Facility Manager Options

April, 1999

ORPS GUI Reference Manual

Table of Contents

Introduction 1
- Purpose of the Course 1
- Objectives 1

ORPS Facility Manager Search & Reports Page 2
- The User Profile 3
- The Search Profile 3

Creating a Search Profile 5
- Starting a New Search Profile 5
- Refining a Search Profile 6
- Displaying Search Specifications 10
- Screening a Search Profile 11
- Finishing a Search Profile 13

Editing a Search Profile 17
- Editing Field Selections 17
- Editing Screen Criteria 19
- Editing the Status Date Range 20

Search Features 22
- The Boolean Logic Specification Box 22
- The Occurrence Report Number Selection Area 24
- Status Date/Time Search Range 25
  - ORPS Manager OR Search Criteria Page 27
  - ORPS Manager OR Search & Reports Page 28

Manager Report Options 33
- Manager Reports Elements 35
- The Manager Report 36
- Manager Report Filters 39
- Report Features 41
  - Viewing Facility Representative and Program Manager Comments 42
  - Viewing Corrective Actions 42
  - Revising a Corrective Action Target Date 44
  - Closing a Corrective Action 44

Appendix A - Search Field Definitions A-1
- Search Fields A-1

Appendix B - Spell Checking Your Report B-1
Obtaining the Spell Check Application B-1
Installing WordScribe B-1
Using WordScribe B-6
Spell Checking Interactively B-7
Spell Checking in Batch Mode B-8
Editing the Spelling Dictionary B-9

Exercise Solutions S-1

Index I-1

Introduction

Purpose of the Course

In this class you will learn how to identify, for your facilities, occurrence reports (ORs) that are new, that have been rejected or commented upon, that have had changes to corrective action dates, and that are in the approval process. You will also learn how to update a corrective action date. In addition, you will learn how to create, save, edit, and delete search criteria and use the date range feature.

Objectives

Upon completion of this class, you will be able to perform the following activities:

- Access the **ORPS MANAGER OR SEARCH & REPORTS** page and explain the purpose of the control panel
- Create, save, edit, and delete a search profile
- Utilize the date range feature and explain the various options available
- Utilize the various report options
- Identify new occurrence reports for your facilities, occurrence reports for your facilities that have been rejected by the DOE Facility Representative (FR) or DOE-HQ Program Manager (PM) or have had other FR/PM comments added, and occurrence reports that have had changes to corrective action dates and the details of those changes
- Update a corrective action date

ORPS Facility Manager Search & Reports Page

The **ORPS MANAGER OR SEARCH & REPORTS** page (**Figure 1**) is accessed from the **OCCURRENCE REPORTING & PROCESSING SYSTEM** home page by clicking on the **FM Functions** hyperlink. This page is customized for you (the Facility Manager or designee) and functions as a control panel to allow for search, report, and update capabilities for facilities under your jurisdiction.

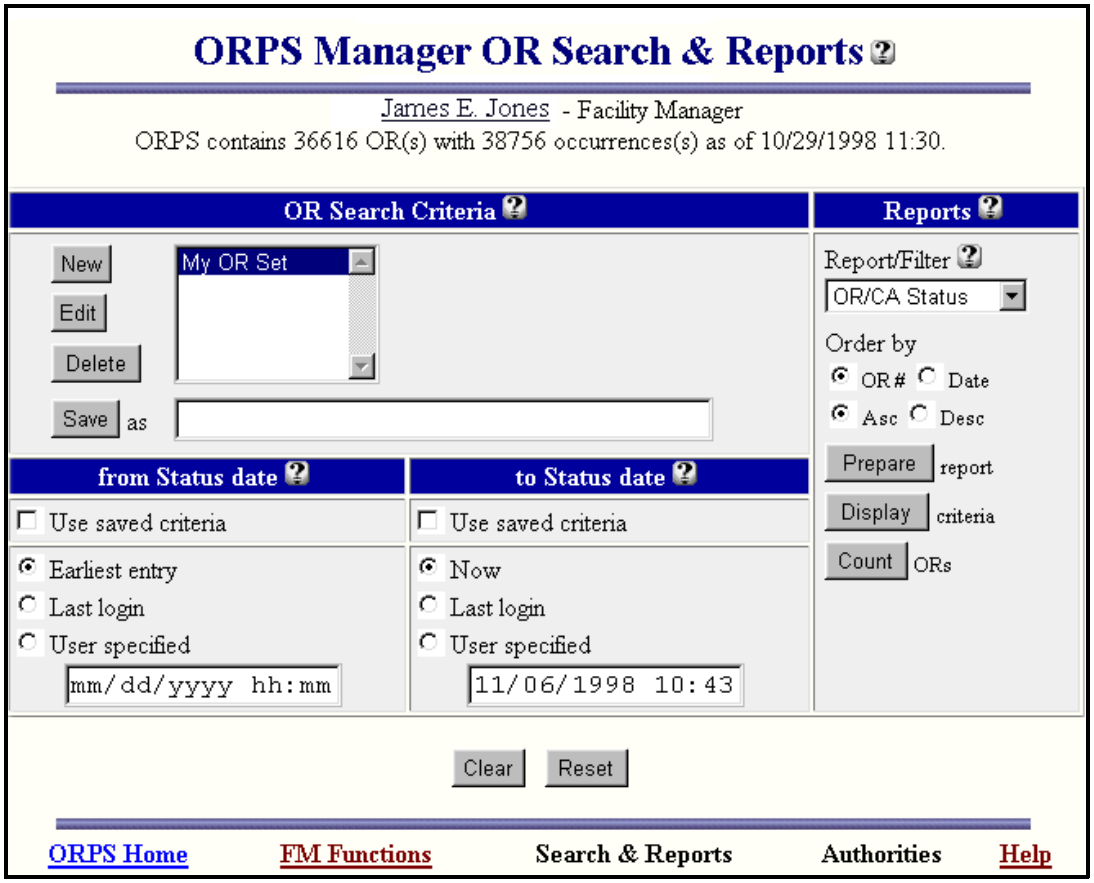


Figure 1 - The **ORPS MANAGER OR SEARCH & REPORTS** control panel.

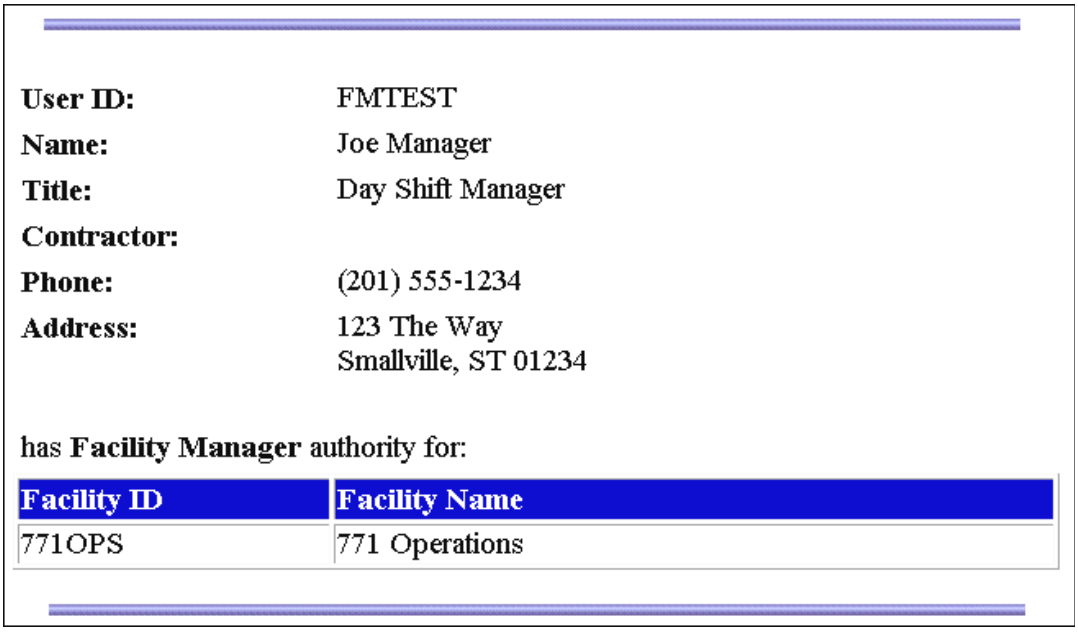
The control panel is divided into four sections: **OR SEARCH CRITERIA**, **REPORTS**, **FROM STATUS DATE**, and **TO STATUS DATE**. The **OR SEARCH CRITERIA** section allows you to create, edit, save, or delete a set of search specifications. The **REPORTS** section allows you to generate reports and perform Facility Manager functions based on the occurrence reports selected with a set of search specifications. The two **STATUS DATE** sections allow you to filter selections based on report status date ranges.

NOTE

A **FM Functions** hyperlink is available at the bottom of most pages in the ORPS GUI. You can always get back to the control panel by clicking on this hyperlink.

The User Profile

At the top of the control panel is your name which is hyperlinked to the **ORPS USER PROFILE** page (**Figure 2**). This page lists general information about you and contains a table listing the facilities under your authority.



User ID: FMTEST
Name: Joe Manager
Title: Day Shift Manager
Contractor:
Phone: (201) 555-1234
Address: 123 The Way
Smallville, ST 01234

has **Facility Manager** authority for:

Facility ID	Facility Name
771OPS	771 Operations

Figure 2 - The **ORPS USER PROFILE** page.

The Search Profile

All operations performed in the control panel are based on a set of search specifications called a search profile. You can select, create, edit, save, and delete search profiles in the **OR SEARCH CRITERIA** section (**Figure 3**) of the control panel.

An initial set of data has been predefined for your searches. It is all of the occurrence reports for the facilities under your authority. This set of data serves as the basis for any new profiles you create. A predefined profile named **My OR Set** reflects this initial set of data. **My OR Set** cannot be edited or deleted; however, any status date ranges specified will apply to this profile.

NOTE

All of the Facility Manager functions on the HP ORPS can be performed by simply using the **My OR Set** search profile and the status date range. The ability to create additional search profiles provides you with the capability of specifying a more precise set of data with which to work.

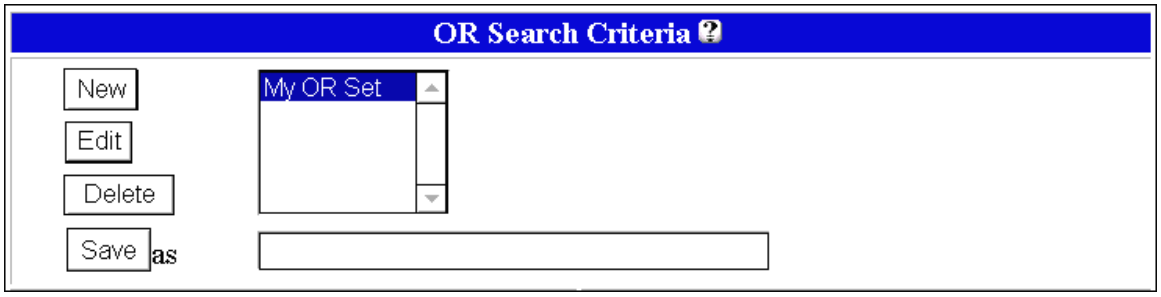


Figure 3 - The **OR SEARCH CRITERIA** section of the **ORPS MANAGER OR SEARCH & REPORTS** control panel.

Four command buttons are used to manage user-defined search profiles. Each is briefly explained in the following table.

Command Button	Function
New	Allows you to define the search specifications for a new search profile.
Edit	Recalls the search specifications saved in a selected search profile and places the specifications in a new OR search profile.
Delete	Removes the selected search profile.
Save	Saves the user-defined search specifications in a user-named search profile.

Creating a Search Profile

Starting a New Search Profile

To initiate the creation of a search profile, click on the **NEW** command button in the **OR SEARCH CRITERIA** section of the **ORPS MANAGER OR SEARCH & REPORTS** control panel. You will be presented with the **ORPS MANAGER OR SEARCH CRITERIA** page (**Figure 4**), where you can specify the search fields for the new search. You are also permitted to select date ranges (**STATUS DATE** sections) that are saved with the new set of criteria.

Figure 4 - The **ORPS MANAGER OR SEARCH CRITERIA** page.

Search fields are displayed at the top of the page. They are selected by clicking in the check boxes. Descriptions of the search fields are found in ***Appendix A*** and are also

available on-line through the ORPS help utility (click on the **Help** hyperlink found at the bottom of most ORPS GUI pages). By default, fields selected from the check boxes have the Boolean operator *AND* applied between the fields. You can use the **BOOLEAN LOGIC SPECIFICATION** edit box to specify the *OR* or *NOT* operators (or a combination of all three operators) between fields. The edit box is discussed further in the ***Search Features*** section.

You can start a new search profile set at any time in the process by clicking on the **NEW** command button at the bottom of the page. This will clear out all selections except those in the two **STATUS DATE** sections. The **CLEAR** command button will clear all selections and restore the page to the default settings. You can also reset the selections on the page to the values that existed when the page was last loaded by clicking on the **RESET** command button. Once you have selected the fields to include, you are ready to refine the profile.

WARNING

The **RESET** command button ONLY resets selections on the page to the values that existed when the page was last entered or refined. It does not reset the values to the default selections that are displayed when you initially enter the **ORPS MANAGER OR SEARCH CRITERIA** page.

Refining a Search Profile

Clicking on the **REFINE** command button on the **ORPS MANAGER OR SEARCH CRITERIA** page dynamically recreates the search screen to reflect the search field selections made on the previous search page. From here, you can define the values within the specified search fields.

NOTE

At this level, values specified within selection boxes always have the Boolean operator *OR* applied.

Figure 5 shows the page that is dynamically recreated after selecting **Report Year** and **Report Type** as the search fields and then specifying **1998**, **1997**, and **X-Update/Final** as the values for those fields. Based on the previous discussion, the logic for this search is (Report Year = 1998 OR Report Year = 1997) AND (Report Type = X-Update/Final).

NOTE

Selections displayed in the **FACILITY** selection box are limited to those facilities under your authority. Selections displayed in the **OPERATIONS/FIELD OFFICE**, **AREA OFFICE**, **CONTRACTOR**, **SECRETARIAL OFFICE**, and **LAB/SITE/ORG** selection boxes are not limited; however, all search criteria will have a default selection applied that consists of only your facilities. Therefore, selection of contractors, etc., other than your own is meaningless and will result in the selection of zero records.

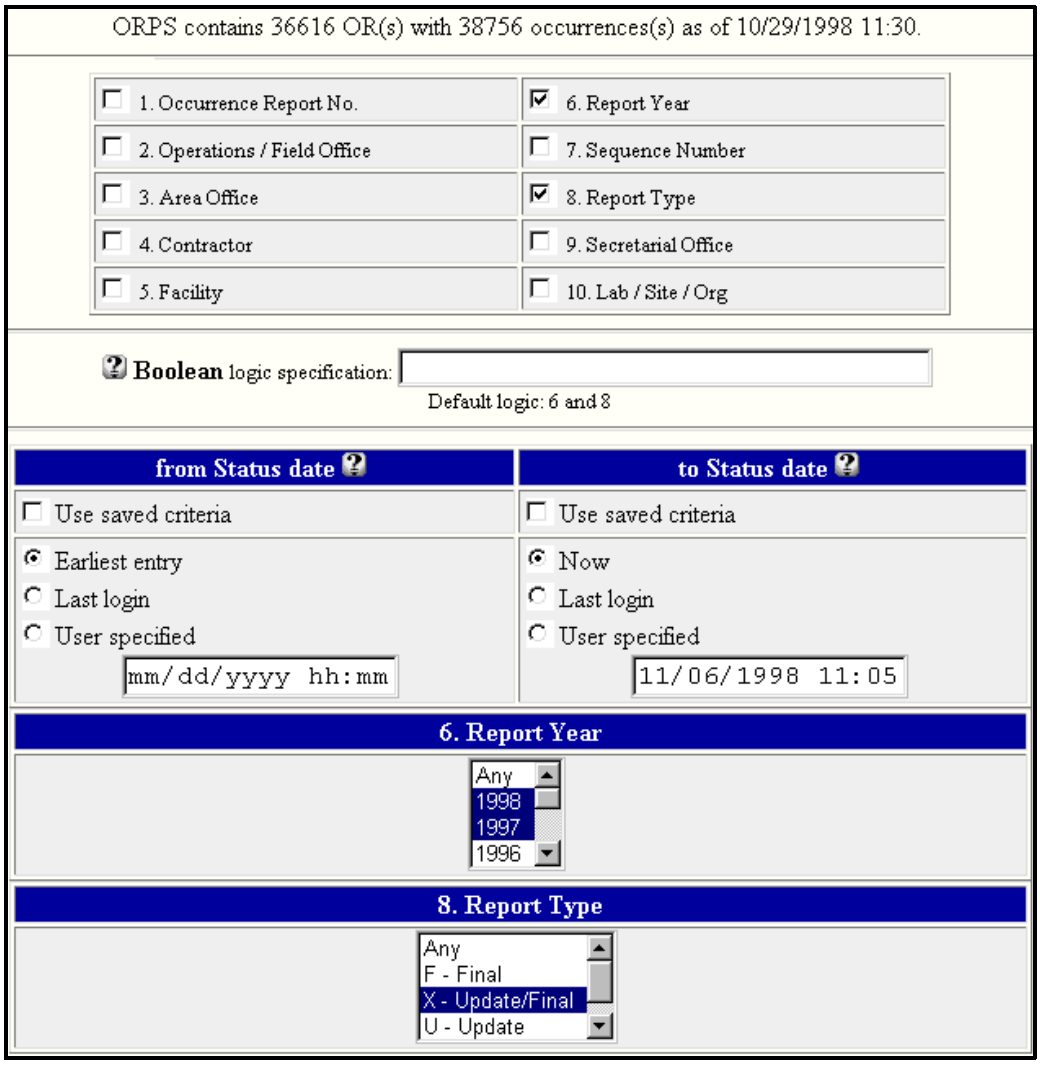


Figure 5 - Example of dynamically created **ORPS MANAGER OR SEARCH CRITERIA** page.

After specifying the field values, you can again click on the **REFINE** command button. The search screen is recreated to reflect the search field selections and values made on the previous search page. In addition, the total number of occurrence reports and occurrences found by the search is listed near the top of the page. The name of the search profile is also shown at the top of the page (**Figure 6**).

NOTE

When a new search is created, the GUI temporarily names the profile **Untitled**.

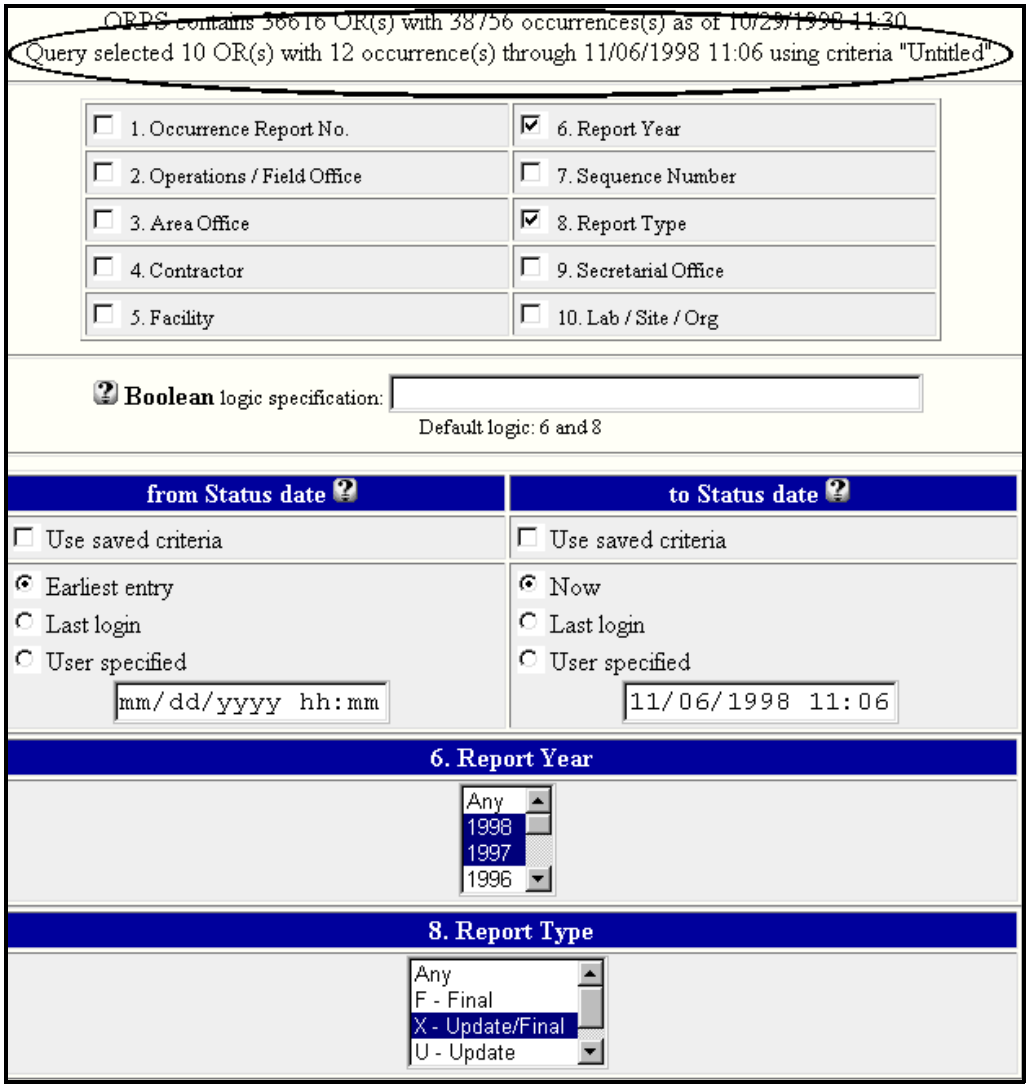


Figure 6 - Example of dynamically created **ORPS MANAGER OR SEARCH CRITERIA** page with totals and search profile name at the top of the page.

WARNING

In some browsers (e.g., Internet Explorer and Netscape), when a page is loaded, the selection boxes are reset to display the top entry in each selection box. However, your previous selections are still highlighted and active; you can view them by using the scroll bar.

Three command buttons were added at the bottom of the page (for a total of seven buttons) the first time you clicked on the **REFINE** command button. Each button is briefly explained in the following table.

Command Button	Function
New	Allows you to initiate the creation of a new search profile. This will clear out all selections except those in the two **STATUS DATE** sections.
Refine	Recreates the **ORPS MANAGER OR SEARCH CRITERIA** page to reflect selection areas for the search fields specified on the previous page. In addition, the total number of occurrence reports and occurrences found by the search is displayed.
Screen	Allows you to selectively include or exclude reports from the search.
Display	Displays the search specifications for the current search profile.
Finish	Finishes the search refinement and returns you to the **ORPS MANAGER OR SEARCH & REPORTS** page.
Clear	Clears all selections and restores all the defaults on the page.
Reset	Resets the selections on the page to the values that existed when the page was last loaded.

Displaying Search Specifications

You can view the specifications for the search profile by clicking on the **DISPLAY** command button at the bottom of the page. Information displayed on the **ORPS DISPLAY SEARCH CRITERIA** page includes the name of the search profile, search values and connective logic, and status date ranges (**Figure 7**).

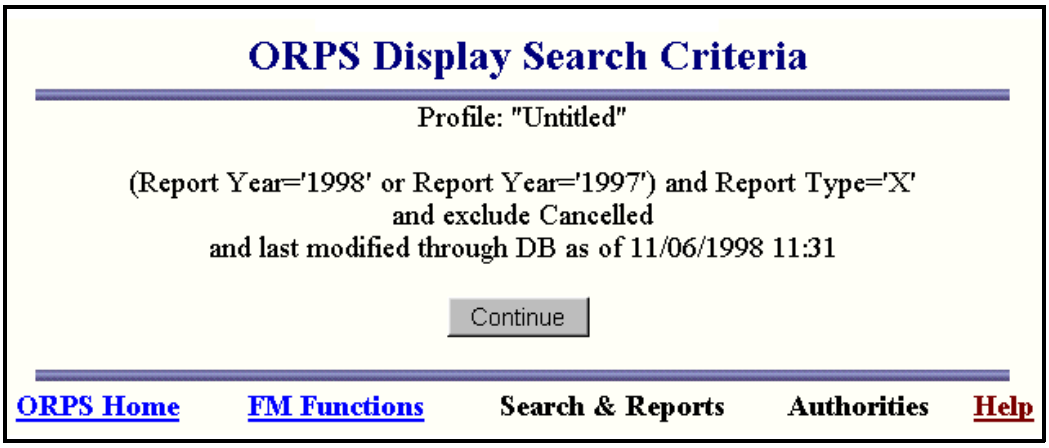


Figure 7 - The **ORPS DISPLAY SEARCH CRITERIA** page.

Screening a Search Profile

Clicking on the **SCREEN** command button on the **ORPS MANAGER OR SEARCH CRITERIA** page will take you to the **ORPS SCREEN OR SEARCH CRITERIA** page (**Figure 8**). This page is dynamically created based on the selections made on the **ORPS MANAGER OR SEARCH CRITERIA** page. The total number of occurrence reports and total occurrences found by the search are listed near the top of the page. The name of the search profile is also shown at the top of the page. Each occurrence report is listed individually by **Subject/Title**, **Report Number**, and **Occurrence Date** (Discovery Date).

You can link to an individual report by clicking on the **Subject/Title**. Two radio buttons, **EXCLUDE** and **INCLUDE**, at the top of the screen allow you to either exclude (the default) or include a record from the ORPS search selection by clicking on the check box to the left of the **Subject/Title**.

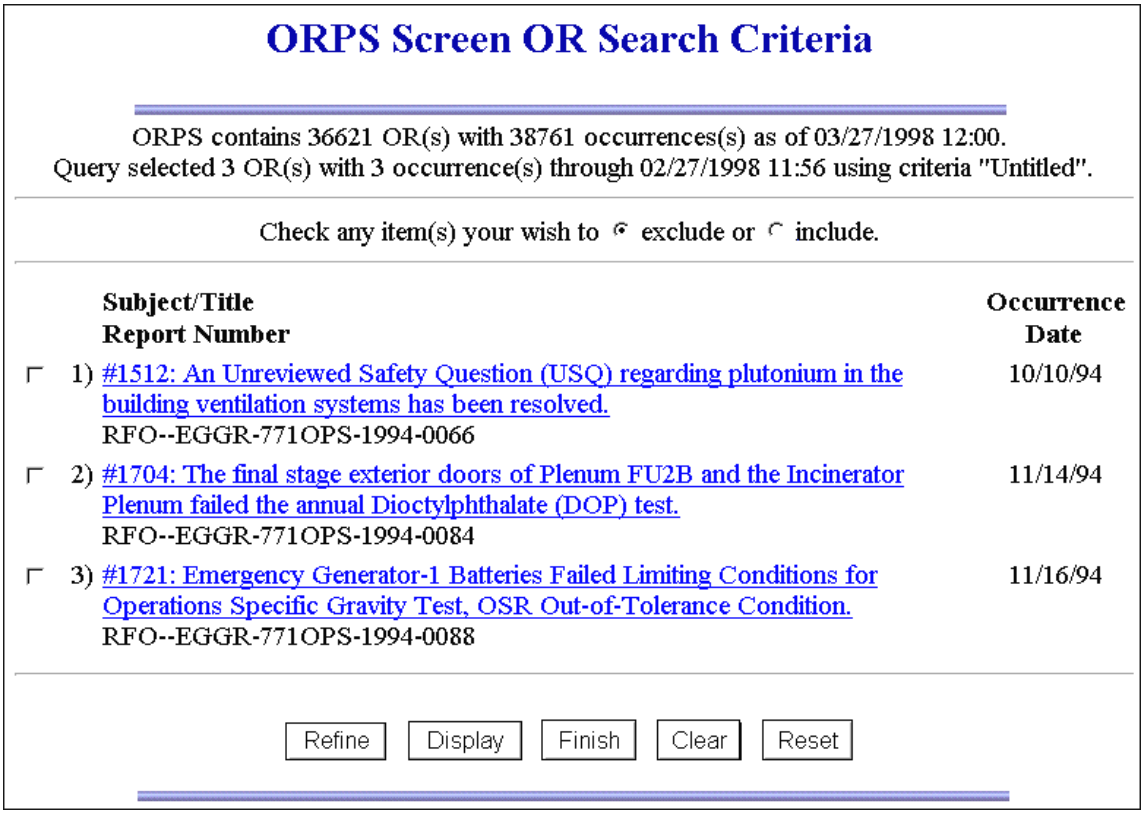


Figure 8 - Example of a dynamically created **ORPS SCREEN OR SEARCH CRITERIA** page.

Five command buttons are used to process selections on the **ORPS SCREEN OR SEARCH CRITERIA** page. Each is briefly explained in the following table.

Command Button	Function
Refine	Recreates the screening page to reflect screening selections made, and displays the revised number of occurrence reports and occurrences at the top of the page.
Display	Displays the search specifications for the current search. Refinements made from the **ORPS SCREEN OR SEARCH CRITERIA** page become part of the current search profile.
Finish	Finishes the screening and returns you to the **ORPS MANAGER OR SEARCH & REPORTS** page.
Clear	Restores all the defaults on the **ORPS SCREEN OR SEARCH CRITERIA** page (i.e., all checks are removed from the check boxes and the **EXCLUDE** radio button is marked).
Reset	Resets the selections on the page to the values that existed when the page was last loaded or refined.

NOTE

The **Screen** information is saved with the search profile and can be edited.

Finishing a Search Profile

Clicking on the **FINISH** command button on either the **ORPS MANAGER OR SEARCH CRITERIA** page or the **ORPS SCREEN OR SEARCH CRITERIA** page processes the selections and returns you to the **ORPS MANAGER OR SEARCH & REPORTS** page. A new search profile has been added to the **OR SEARCH CRITERIA** selection box (**Figure 9**). It is a temporary file (named **Untitled**) that can be used as the criteria to generate reports.

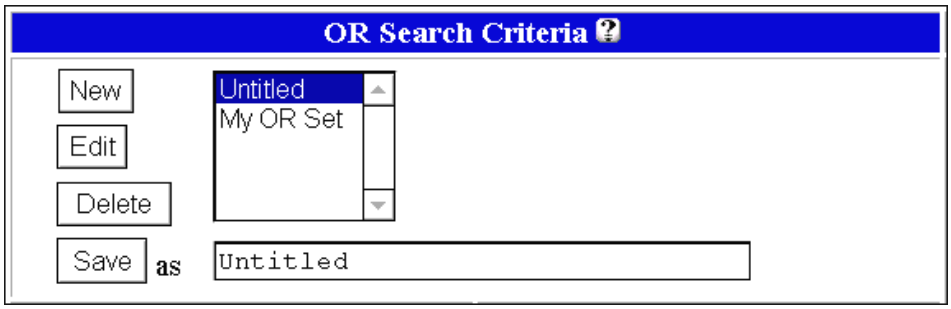


Figure 9 - A temporary search profile.

If desired, you can save the search profile for future use by typing a name in the **SAVE AS** edit box (type over **Untitled**) and click on the **SAVE** command button. The typed name will appear in the selection box in place of **Untitled** (**Figure 10**). A maximum of 32 characters and spaces is allowed in the profile name. There is no limit on the number of profiles that can be saved.

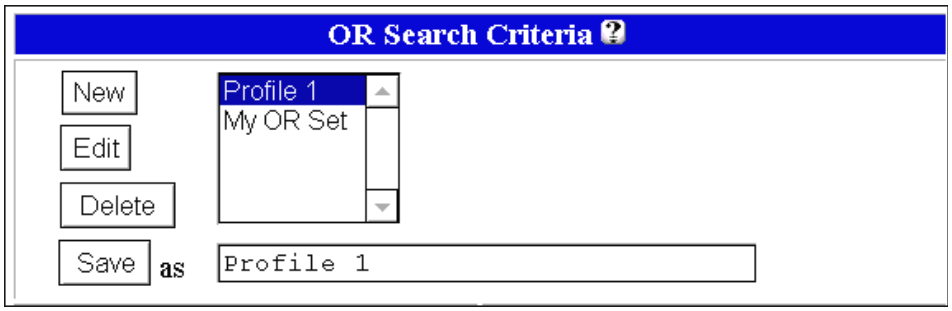


Figure 10 - A saved search profile.

WARNING

"Untitled" is a reserved name and cannot be used as the title of any saved search criteria.

NOTE

To display the search specifications for any search profile displayed in the **OR SEARCH CRITERIA** selection box, click on the **DISPLAY** criteria command button in the **REPORTS** section of the **ORPS MANAGER OR SEARCH & REPORTS** page.

To delete a saved search profile, select the name of the set from the **OR SEARCH CRITERIA** selection box and then click on the **DELETE** command button.

Step-by-Step

TUTORIAL

Creating and Saving a New Search Profile

1. Click on the **NEW** command button in the **ORPS SEARCH CRITERIA** section of the **ORPS MANAGER OR SEARCH & REPORTS** page.

2. Select search fields by clicking in the check boxes on the **ORPS MANAGER OR SEARCH CRITERIA** page.

REMINDER: The default Boolean operator between search fields is *AND*.

3. Click on the **REFINE** command button at the bottom of the page.

4. Specify search field values from the recreated **ORPS MANAGER OR SEARCH CRITERIA** page.

REMINDER: Field values specified within selection boxes always have the Boolean operator *OR* applied.

5. Click on the **FINISH** command button at the bottom of the page.

6. Verify that **Untitled** is selected from the **OR SEARCH CRITERIA** selection box in the **OR SEARCH CRITERIA** section of the **ORPS MANAGER OR SEARCH & REPORTS** page.

7. Type the name in the **SAVE AS** edit box in the **OR SEARCH CRITERIA** section of the **ORPS MANAGER OR SEARCH & REPORTS** page.

REMINDER: A maximum of 32 characters and spaces is allowed in the name.

8. Click on the **SAVE** command button in the **OR SEARCH CRITERIA** section of the **ORPS MANAGER OR SEARCH & REPORTS** page.

Exercise 1

As you work, write down the steps you take. These notes will act as a reminder when you take similar actions in the future.

1. Create a new search profile that contains occurrence reports for the current year for a facility under your authority.

2. Save the search profile as **My Facility - Current Year.**

3. Delete the search profile titled **My Facility - Current Year.**

Editing a Search Profile

The **EDIT** command button in the **SEARCH CRITERIA** section of the **ORPS MANAGER OR SEARCH & REPORTS** page is used to edit search profiles. It can be used to edit an unsaved search profile (called **Untitled**) or a user-named search profile.

When you select the **EDIT** command button to edit an "unsaved" search profile, you will be returned to the **ORPS MANAGER OR SEARCH CRITERIA** page with the current search specifications listed on the page. From this recreated page, you can change field selections, screening criteria, or the status date range. Select the **FINISH** command button to return to the **ORPS MANAGER OR SEARCH & REPORTS** page where the name, **Untitled**, is displayed in the **SAVE AS** edit box.

When you select the **EDIT** command button to edit a "saved" search profile, you will be returned to the **ORPS MANAGER OR SEARCH CRITERIA** page with the saved search specifications listed on the page. From this recreated page, you can change field selections, screening criteria, or the status date range. Select the **FINISH** command button to return to the **ORPS MANAGER OR SEARCH & REPORTS** page where the name of the profile is already displayed in the **SAVE AS** edit box.

You can now save the search profile with the same name by clicking on the **SAVE** command button. When you do this, the original search profile is overwritten. If you do not want to overwrite the original profile, enter a different name in the **SAVE AS** edit box and click on the **SAVE** command button. The original search profile will then be retained and a search profile containing the new search specifications is added. If you do not want to save the new search profile with the changes, you can click on the **CLEAR** command button at the bottom of the page. This will empty the contents of the **SAVE AS** edit box and return to the default settings of the **ORPS MANAGER OR SEARCH & REPORTS** page.

WARNING

You cannot edit the **My OR Set** search profile.

Editing Field Selections

You can edit field selections for a user-defined search profile by changing the values for an existing search field or by specifying different or additional search fields. To change the values for an existing search field, select new values within the search field selection areas that are displayed on the **ORPS MANAGER OR SEARCH CRITERIA** page.

To specify different or additional search fields, select (or deselect) fields with the check boxes or modify the statement in the **BOOLEAN LOGIC SPECIFICATION** edit box, then click on the **REFINE** command button. The **ORPS MANAGER OR SEARCH CRITERIA** page is recreated to reflect the search field selections made on the previous search page and the field values from the current search profile are displayed as the default selections (**Figure 11**). From here, you can define the values within the specified search fields.

WARNING

Any entry in the **BOOLEAN LOGIC SPECIFICATION** edit box overrides selections made in the check boxes; therefore, if the recreated **ORPS MANAGER OR SEARCH CRITERIA** page returns a statement in the **BOOLEAN LOGIC SPECIFICATION** edit box, edit the statement rather than using the check boxes.

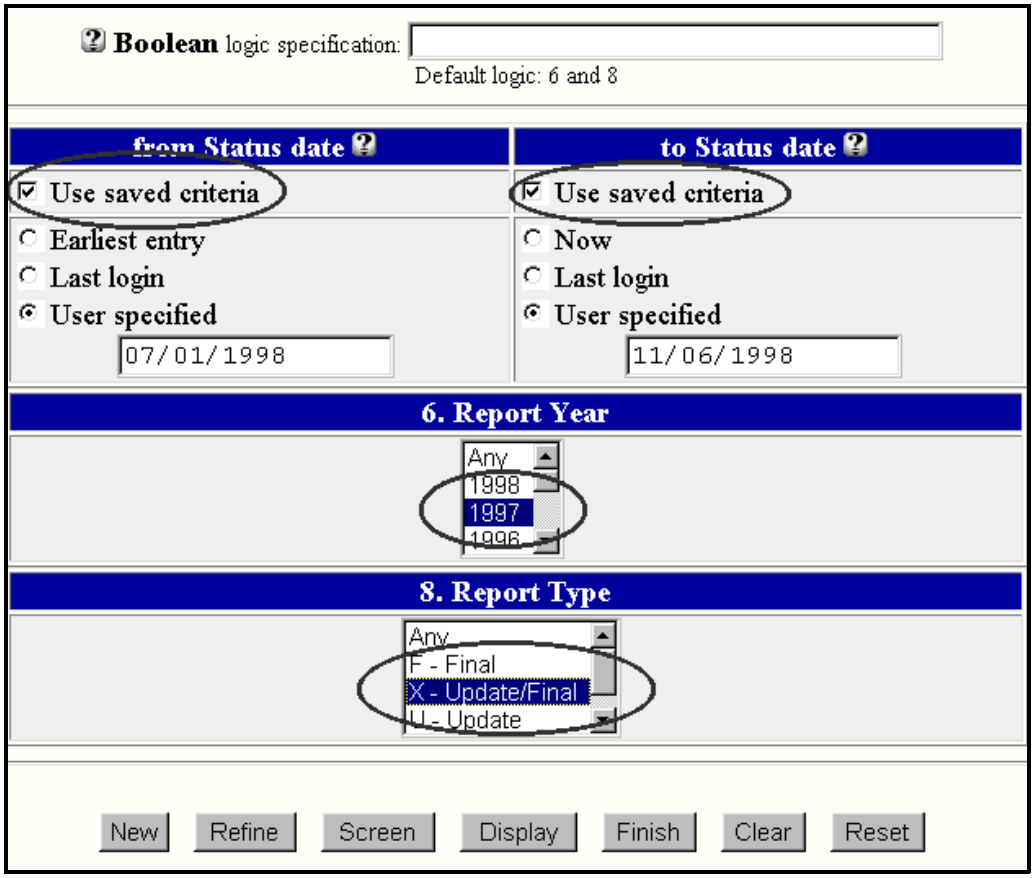


Figure 11 - Example of a dynamically created **ORPS MANAGER OR SEARCH CRITERIA** page that displays default field values from the current search profile.

WARNING

Any edit of field selections or the status date range will delete the **Screen** criteria that are saved with your profile.

Editing Screen Criteria

To edit the screen criteria that are saved with a search profile, click on the **SCREEN** command button at the bottom of the **ORPS MANAGER OR SEARCH CRITERIA** page. The **ORPS SCREEN OR SEARCH CRITERIA** page is recreated to reflect the current screen criteria **(Figure 12)**. From here, you can make modifications to the screen criteria. Remember that changes you make here (e.g., you deselect an excluded record) will only be saved if the profile is resaved, either with a new name or the same name.

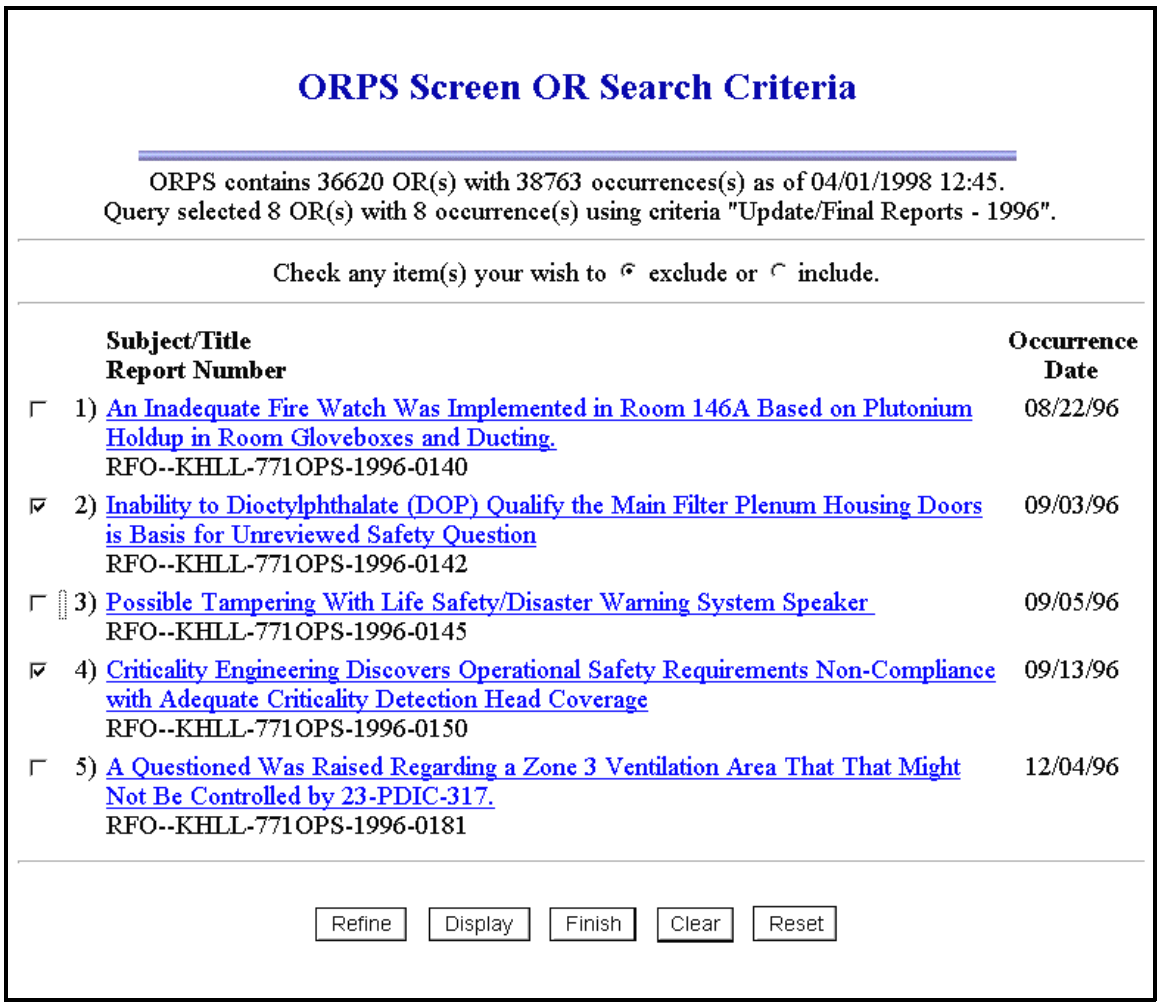


Figure 12 - Example of a dynamically created **ORPS SCREEN OR SEARCH CRITERIA** page that displays screen information for the current search profile.

Editing the Status Date Range

To edit the status date range that is saved with a search profile, make changes to the **FROM STATUS DATE** and **TO STATUS DATE** sections as delineated in the ***Search Features*** section of this manual.

Step-by-Step

TUTORIAL

Editing a Saved Search Profile

1. From the **ORPS MANAGER OR SEARCH & REPORTS** page, select a saved search profile from the **OR SEARCH CRITERIA** selection box.

2. Click on the **EDIT** command button.

3. Make desired changes to the search profile.

4. Click on the **FINISH** command button.

5. a. To save the profile with the original name, click on the **SAVE** command button.

   b. To save the profile with a different name, enter the new name in the **SAVE AS** edit box and then click on the **SAVE** command button.

   c. If you do not want to save the new search profile with the changes, you can click on the **CLEAR** command button at the bottom of the page.

Exercise 2

As you work, write down the steps you take. These notes will act as a reminder when you take similar actions in the future.

1. Create a new search profile that contains Update/Final Reports for the current year for all facilities under your authority.

2. Save the search profile as **Update/Final - Current Year.**

3. Initiate an edit of the search profile titled **Update/Final - Current Year.**

4. Change the profile to contain only Final Reports for the current year for all the facilities under your authority.

5. Save the new search profile as **Final Reports - Current Year.**

The Boolean Logic Specification Box

As previously stated, searches specified with the check boxes automatically have the Boolean operator *AND* applied between the fields. When you click on the **REFINE** command button, the default Boolean logic is displayed below the **BOOLEAN LOGIC SPECIFICATION** edit box (**Figure 13**). The default logic does not display the field names but rather the unique number assigned to each search field.

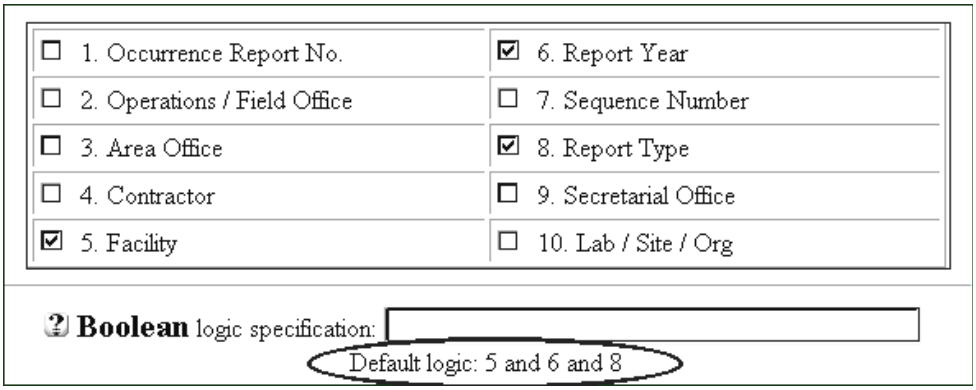


Figure 13 - A section of the **ORPS MANAGER OR SEARCH CRITERIA** page showing how the default Boolean logic is displayed.

An alternative to selecting search items with check boxes is to enter the search fields (by number) directly into the **BOOLEAN LOGIC SPECIFICATION** edit box using Boolean logic. The Boolean operators can be entered as either upper case or lower case and must be separated from the search field number by a space (**Figure 14**).

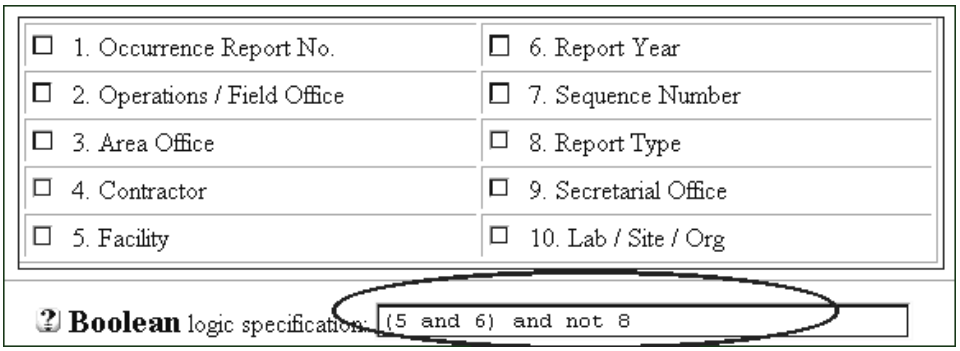


Figure 14 - A section of the **ORPS MANAGER OR SEARCH CRITERIA** page showing how user-defined Boolean logic is entered.

When the search profile is refined, search fields entered in the edit box will also be marked in the check boxes (**Figure 15**).

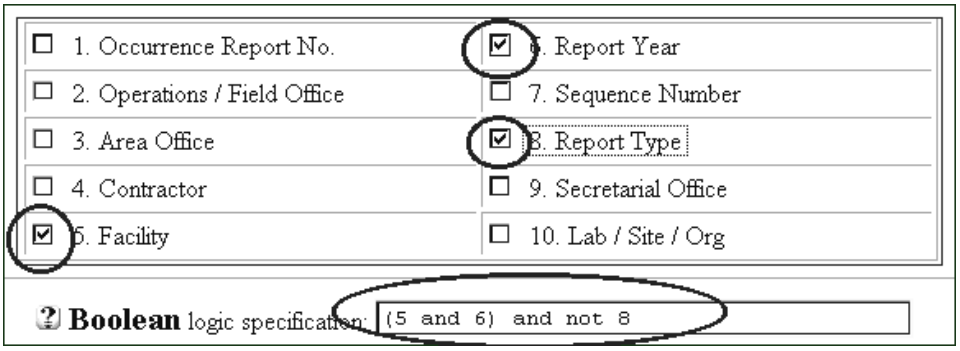


Figure 15 - A section of the **ORPS MANAGER OR SEARCH CRITERIA** page showing how Boolean logic is marked in the selection boxes following refinement of a search profile.

WARNING

Any entry in the **BOOLEAN LOGIC SPECIFICATION** edit box overrides selections made in the check boxes.

The three basic operators, *AND*, *OR*, and *NOT*, can be used in the **BOOLEAN LOGIC SPECIFICATION** edit box. Search terms combined with the Boolean *AND* will return occurrence reports in your predefined set (i.e., occurrence reports for facilities under your authority) that contain <u>all</u> of the search terms. Search terms combined with the Boolean *OR* will return occurrence reports that contain <u>any</u> of the search terms in your predefined set. Search terms combined with the Boolean *NOT* can be used to <u>exclude</u> occurrence reports from a search. The precedence of operators within an expression is *NOT*, *AND*, and *OR*, but the order of execution can be specified by the use of parentheses.

The Occurrence Report Number Selection Area

To display an **OCCURRENCE REPORT NUMBER** selection area, you must dynamically recreate the **ORPS MANAGER OR SEARCH CRITERIA** page. First select the **Occurrence Report Number** field by clicking on its associated check box (or typing the field number in the **BOOLEAN LOGIC SPECIFICATION** edit box). Then click on the **REFINE** command button. **Figure 16** is an example **OCCURRENCE REPORT NUMBER** selection area. The **OCCURRENCE REPORT NUMBER** selection area contains five selection boxes and one edit box that correspond to the elements of an occurrence report number: Field Office identifier, Area Office identifier, Contractor identifier, Facility identifier, Year of Occurrence, and Sequence Number.

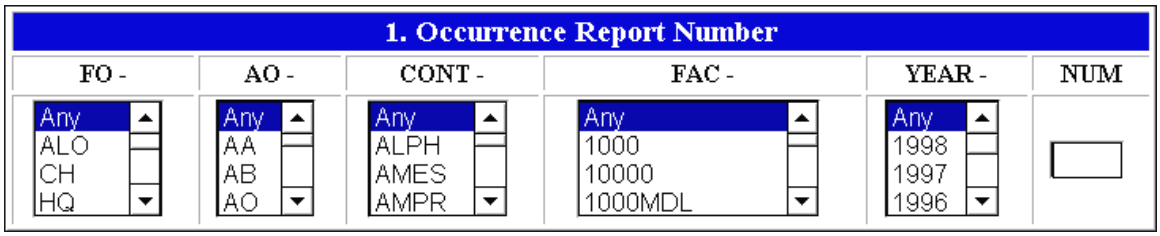


Figure 16 - The **OCCURRENCE REPORT NUMBER** selection area on a dynamically recreated **ORPS MANAGER OR SEARCH CRITERIA** page.

When working with these selection and edit boxes, the following rules apply:

- Within a single selection box, multiple choices use *OR* logic
- Between selection boxes the *AND* logic is applied
- If **Any** is selected in a selection box, the default is <u>all</u>
- Similarly, if nothing is entered in the **NUM** edit box, the default is <u>all</u>
- Leading zeros are not required in the **NUM** edit box

NOTE

It is not necessary to fill in all the items in the **OCCURRENCE REPORT NUMBER** selection area. Usually **FACILITY**, **YEAR**, and **NUM** are enough to fully define a particular record. However, including all information (at least **FO**) will improve system performance.

Status Date/Time Search Range

The selections within the **FROM STATUS DATE** and **TO STATUS DATE** sections allow you to filter your search of the database to include records for which the most recent change occurred within the specified date ranges. The database filtering that is accomplished through the **STATUS DATE** sections is based on a time stamp recorded at each change to a report. Because this time stamp records the date and time of every change to a record, it is possible to limit the search to new records that may require your immediate attention (e.g., status changes within the last week) or to older records that require your attention (e.g., status changes more than three months old).

Status date/time ranges are specified by clicking on the radio buttons within the **FROM STATUS DATE** and **TO STATUS DATE** sections of the control panel. If the radio button associated with the **FROM STATUS DATE USER SPECIFIED** edit box is selected, then a date/time value must be entered into the edit box; however, the **TO STATUS DATE USER SPECIFIED** edit box defaults to the current date and time.

NOTE

You are not required to enter a time value in the edit boxes; however, when a time value is not specified, the default time is 00:00 (zero hours). The effect of this default is inclusion of cases at the starting date (**FROM STATUS DATE** section) and the exclusion of cases at the ending date (**TO STATUS DATE** section).

Figure 17 shows the **FROM STATUS DATE** and **TO STATUS DATE** sections of the control panel. The function of each item within the **FROM STATUS DATE** and **TO STATUS DATE** selection areas is explained in the following tables. It is important to remember that each of these selections is limited to your initial set of data (i.e., all of the occurrence reports for the facilities under your authority).

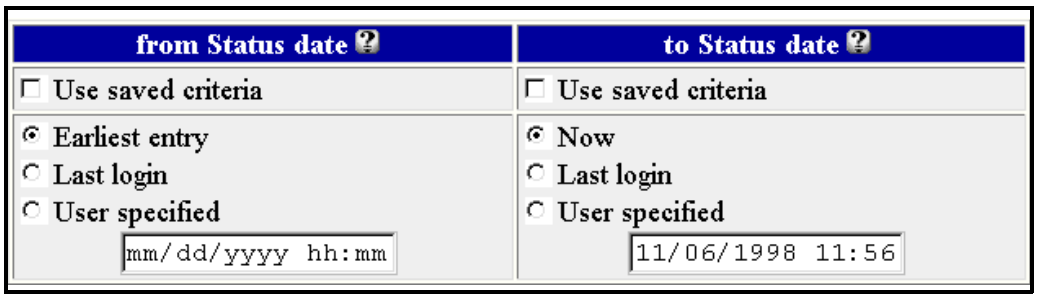


Figure 17 - The **FROM STATUS DATE** and **TO STATUS DATE** selection area.

From Status Date		Function
Use saved criteria		If this box is checked, the system starts the search from the date saved in the selected search criteria. If this box is not checked, the system uses the selection from the bottom pane of the selection area to determine the start date.
	Earliest entry	Starts the search at the beginning of the database.
	Last Login	Starts the search from the last date and time you logged in to the ORPS GUI.
	User specified date edit box	Starts the search at the date and time specified in the associated edit box. In order for any entry in the **FROM STATUS DATE** edit box to be recognized, the radio button associated with the edit box must be selected.

To Status Date		Function
Use saved criteria		If this box is checked, the system ends the search at the date and time saved in the selected search criteria. If this box is not checked, the system uses the selection from the bottom pane of the selection area to determine the end date.
	Now	Ends the search at the current date and time.
	Last Login	Ends the search at the date and time you last logged in to the ORPS GUI.
	User specified date edit box	Ends the search at the date and time specified in the associated edit box. In order for any entry in the **TO STATUS DATE** edit box to be recognized, the radio button associated with the edit box must be selected.

The **FROM STATUS DATE** and **TO STATUS DATE** sections are located on both the **ORPS MANAGER OR SEARCH CRITERIA** page and on the **ORPS MANAGER OR SEARCH & REPORTS** page. On each page, the sections serve a different function.

ORPS Manager OR Search Criteria Page

From the **ORPS MANAGER OR SEARCH CRITERIA** page, the **FROM STATUS DATE/TO STATUS DATE** sections are used to define the date/time range that is saved with the search profile and therefore, the date/time value that is used when the **SAVED** check boxes are checked. When you create a new search profile, the default selections for the **FROM STATUS DATE** section is **Earliest entry** and for the **TO STATUS DATE** section is **Now**.

When you edit a search profile, the default selections for the **FROM STATUS DATE** and the **TO STATUS DATE** sections are **Use Saved Criteria** to reflect those that were saved with the profile. You can change the default selections to specify a different status date/time range to be saved with the profile.

Changes made to the date/time ranges at this point will affect the current selections, but will not alter the ranges stored in the search profile unless you save the changes in a search profile with the same name. (In essence, you would be overwriting the original search profile.)

To view the date and time range that will be saved with the profile, click on the **DISPLAY** command button at the bottom of the **ORPS MANAGER OR SEARCH CRITERIA** page.

ORPS Manager OR Search & Reports Page

From the **ORPS MANAGER OR SEARCH & REPORTS** control panel, the **FROM STATUS DATE/TO STATUS DATE** sections are used to define the date/time range that is used for generating reports. The default selection for the **FROM STATUS DATE** section is **Earliest entry** and for the **TO STATUS DATE** section is **Now**. If you want to use the date/time range that was saved with the profile, you must select the **USE SAVED CRITERIA** check boxes in the **FROM STATUS DATE/TO STATUS DATE** sections. To view the date and time range that will be used to generate a report, click on the **DISPLAY** command button in the **REPORTS** section of the **ORPS MANAGER OR SEARCH & REPORTS** page.

NOTE

The date/time range used to generate reports applies to user-saved search profiles, temporary search profiles (i.e., **Untitled**), and the predefined profile, **My OR Set**.

Step-by-Step

TUTORIAL

Saving a Status Date/Time Range with an Existing Search Profile

1. From the **ORPS MANAGER OR SEARCH & REPORTS** page, highlight the search profile in the **OR SEARCH CRITERIA** selection box, and then click on the **EDIT** command button.

REMINDER: To view the date and time range that has been saved with the profile, click on the **DISPLAY** command button at the bottom of the **ORPS MANAGER OR SEARCH CRITERIA** page.

2. Specify the status date/time range from within the **FROM STATUS DATE** and **TO STATUS DATE** sections.

REMINDER: To view the date and time range that will be saved with the profile, click on the **DISPLAY** command button at the bottom of the **ORPS MANAGER OR SEARCH CRITERIA** page.

3. Click on the **FINISH** command button at the bottom of the page.

4. Click on the **SAVE** command button in the **OR SEARCH CRITERIA** section of the **ORPS MANAGER OR SEARCH & REPORTS** page.

Step-by-Step

TUTORIAL

Saving a Status Date/Time Range with a New Search Profile

1. Click on the **NEW** command button in the **OR SEARCH CRITERIA** section of the **ORPS MANAGER OR SEARCH & REPORTS** page.

2. Select search fields by clicking in the check boxes on the **ORPS MANAGER OR SEARCH CRITERIA** page.

3. Specify the status date/time range from within the **FROM STATUS DATE** and **TO STATUS DATE** sections.

4. Click on the **REFINE** command button at the bottom of the page.

5. Specify search field values from the recreated **ORPS MANAGER OR SEARCH CRITERIA** page.

REMINDER: To view the date and time range that will be saved with the profile, click on the **DISPLAY** command button at the bottom of the **ORPS MANAGER OR SEARCH CRITERIA** page.

6. Click on the **FINISH** command button at the bottom of the page.

7. Type the profile name in the **SAVE AS** edit box in the **OR SEARCH CRITERIA** section of the **ORPS MANAGER OR SEARCH & REPORTS** page.

8. Click on the **SAVE** command button in the **OR SEARCH CRITERIA** section of the **ORPS MANAGER OR SEARCH & REPORTS** page.

Step-by-Step

TUTORIAL

Specifying a Status Date/Time Range for Generating Reports

1. Specify the status date/time range within the **FROM STATUS DATE** and **TO STATUS DATE** sections of the **ORPS MANAGER OR SEARCH & REPORTS** page.

   NOTE

   The status date/time range will apply to any profile selected from the **OR SEARCH CRITERIA** selection box on the **ORPS MANAGER OR SEARCH & REPORTS** page.

2. Select a search profile from the **OR SEARCH CRITERIA** selection box.

3. Select a report filter from the **REPORT/FILTER** selection box.

4. Click on the **PREPARE** command button.

At the bottom of the **ORPS MANAGER OR SEARCH & REPORTS** page, there are two buttons. The function of each is described in the following table.

Command Button	Function
Clear	The **CLEAR** command button restores all the defaults on the page (i.e., **FROM STATUS DATE** is **Earliest entry**; **TO STATUS DATE** is **Now**; **OR/CA Status** is the highlighted report in the **REPORT/FILTER** selection box; **ORDER BY** is set to **OR#** and **Asc**; **My OR Set** is the highlighted profile in the **OR SEARCH CRITERIA** selection box).
Reset	The **RESET** command button resets selections made on the control panel to the values when the page was last loaded.

Exercise 3

As you work, write down the steps you take. These notes will act as a reminder when you take similar actions in the future.

1. Create a new search profile that contains occurrence reports for DOE Headquarters Operations/Field Office.

2. Specify a status date/time range to be saved with the profile with a beginning date of two weeks prior to today and an ending date of now.

3. Display the search specifications.

4. Save the search profile as **DOE HQ - Last 2 Weeks.**

5. Specify the date/time range that will start with the beginning of the database and end with the current date and time for generating reports.

6. Display the search specifications.

7. Specify the date/time range saved with **DOE HQ - Last 2 Weeks** for generating reports.

8. Display the search specifications.

Manager Report Options

Managers generate reports by specifying options from the **REPORTS** section of the **ORPS MANAGER OR SEARCH & REPORTS** control panel (**Figure 18**). This control panel allows you to choose a profile and the beginning and ending dates for the report. You choose the profile in the **OR SEARCH CRITERIA** selection box of the control panel and the date and time range in the **FROM STATUS DATE** and **TO STATUS DATE** sections of the control panel.

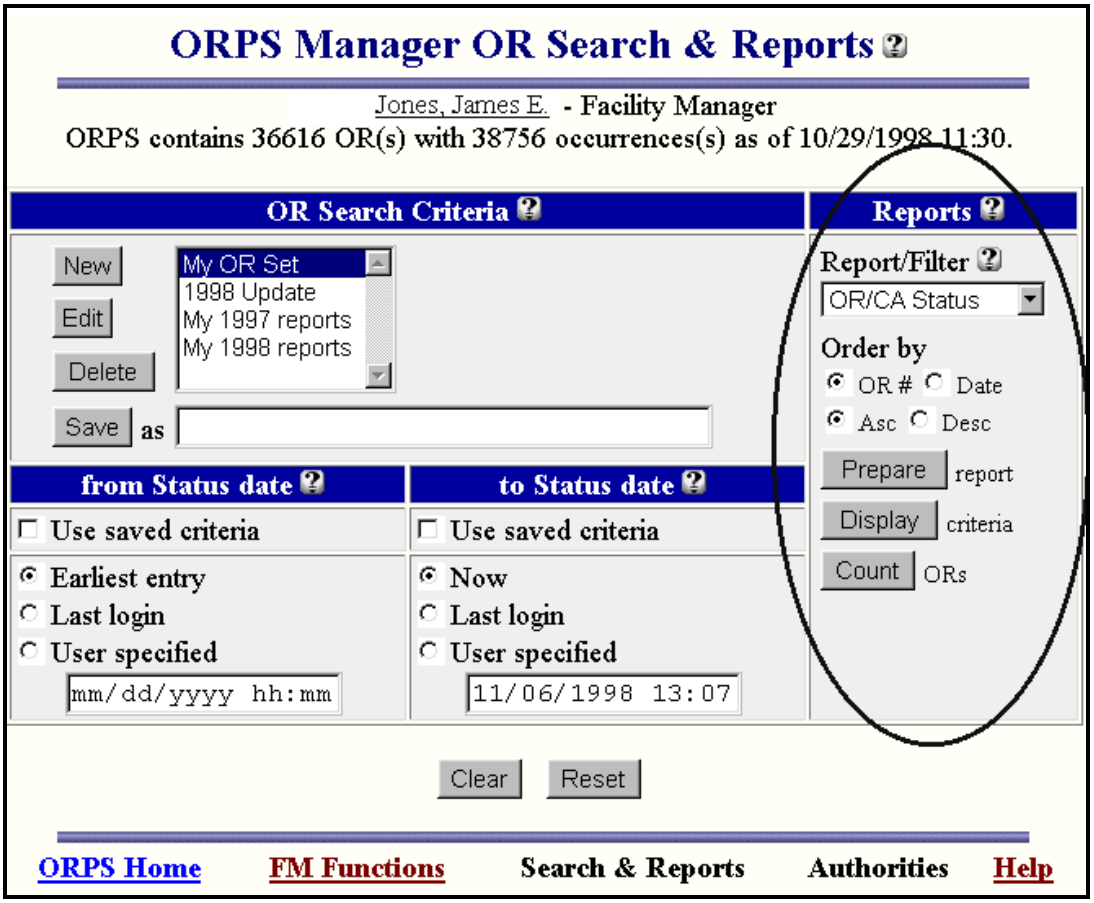


Figure 18 - The **ORPS MANAGER OR SEARCH & REPORTS** page.

The **REPORTS** section of the control panel allows you to select and define specific content for a single report type. You specify content in this report by selectively filtering the ORs contained in the profile. The following sections explain how this is done.

NOTE

The default selection for the **FROM STATUS DATE** section is **Earliest entry** and for the **TO STATUS DATE** section is **Now**. If you want to use the date/time range that was saved with the profile, you must select the **USE SAVED CRITERIA** check boxes in the **FROM STATUS DATE** and **TO STATUS DATE** sections of the control panel.

NOTE

As a reminder, information about the specific records you choose to exclude (or include) is stored with the search profile, and the records are excluded (or included), as appropriate, when the report is generated. To determine the specific records that were excluded (or included), select the search profile and then click the **EDIT** command button. Use the vertical scroll bar to scroll to the bottom of the page and click the **SCREEN** command button. The original selections will be displayed.

Manager Reports Elements

The **REPORTS** section of the **ORPS MANAGER OR SEARCH & REPORTS** control panel contains five elements: a selection box, a set of radio buttons, and three command buttons. Each element is described in the following table.

Control Panel Element	Function
Report/Filter OR/CA Status OR/CA Status - OR Status -- New ORs -- Rejected ORs -- Comments -- for Action -- for My Action - CA Status -- Open CAs -- Changed CAs	The **REPORT/FILTER** selection box allows you to select one of 10 different OR filters for the Manager Report. These filters will exclude (include) certain ORs based on specified filter criteria. Note that multiple selections are not permitted.
Order by OR # Date Asc Desc	The **ORDER BY** radio buttons allow you to specify the order of the occurrence reports when a report is prepared. You can choose to order by occurrence report number or status date (date of last modification) in ascending or descending order. The default order is ascending by occurrence report number.
Prepare	The **PREPARE** command button creates the report corresponding to the filter selected in the **REPORT/FILTER** selection box.
Display	The **DISPLAY** command button displays the search specifications from the current search profile and status date range that will be used to create the report.
Count	The **COUNT** command button displays the count of occurrences, based on the current search profile and status date range, at the top of the **ORPS MANAGER OR SEARCH & REPORTS** page.

The Manager Report

The Facility Manager Report (**Figure 19**) is a listing of occurrence reports that satisfy the criteria specified in the search profile, the status date range, and the filter. The report title (**ORPS Manager OR Status Report**) includes the name of the filter criteria, e.g., **OR/CA Status, New OR(s**), **Rejected OR(s)**, etc.

Displayed at the top of the report is the name of the search profile and the number of occurrence reports and occurrences that meet the profile and status date range criteria. The number of occurrence reports that meet the additional filter criteria is also displayed.

ORPS Manager OR Status Report

OR/CA Status

JOE MANAGER - Facility Manager
ORPS contains 243 OR(s) with 323 occurrences(s) as of 03/23/1999 18:15.
Query selected 2 OR(s) with 2 occurrence(s) from 03/01/1999 00:00 through 03/23/1999 18:28 using criteria "My Non-Final".
A total of 2 OR(s) qualified for this report.

Subject/Title

# Oc.	Report Number / Notes	Category OR/CA Status	Discovery / Status Date	Age (days)
1)	Selective Alpha Brainwave Monitored Alarm Panel Power Light Was Indicating A Possible Loss Of Activity			
1	HQ--TRN-FACBRS-1999-0009	Unusual	01/22/1999	60
	Approved by FR: Cogswell Cogs	FR Approved/Closed	03/02/1999	21
	FR Input			
2)	Picnic Basket Discovered With Contents Missing			
1	HQ--TRN-FACBRS-1999-0010	Unusual	01/22/1999	60
	Approved by FR: R. K. Maroon	FR Approved/Open	03/20/1999	3

CA Detail

OR Summary

Notification	Update	*** Pre-Final Reports ***				Final		Total
		Pending Action		Rejected		CA Status		
		by FR	by PM	by FR	by PM	Open	Closed	
0	0	0	2	0	0	0	0	2

Figure 19 - An example of the Facility Manager Report using the **OR/CA Status** filter.

The following information is displayed for each occurrence report:

- **Subject/Title**: The Subject/Title is a brief description (140 characters or less) of the nature, cause, and result of the occurrence. Each report title is hyperlinked to the full report.

- **# Oc.**: The number of occurrences in an occurrence report.

- **Report Number**: The Occurrence Report Number is a composite of Field Office identifier, Area Office identifier, Contractor identifier, Facility identifier, Year of Occurrence, and Sequence Number.

- **Notes**: The last action that was performed on the occurrence report.

- **Category**: Each occurrence is categorized as Emergency (E), Unusual (U), or Off-Normal (O) depending on the seriousness of the occurrence. In addition, a report can be Canceled.

- **OR/CA Status**: The occurrence report status and the corrective action status. Occurrence report status is displayed until the report becomes final. Once the report becomes final, the occurrence report status (i.e., Final) will be displayed followed by the corrective action status.

- **Discovery Date**: The date and time the occurrence was discovered.

- **Status Date**: The date of the last action.

- **Discovery Age**: The number of days from the discovery date to the current date.

- **Status Age**: The number of days from the status date to the current date.

NOTE

When the OR/CA Status is Final/Closed, dashes appear in the age columns. Age is no longer meaningful when everything is completed.

Following the occurrence report listing is the **OR Summary** table. This table displays a distribution of the listed occurrence reports by report status.

Manager Report Filters

The records selected for the Manager Report can be filtered by additional criteria. These criteria are selected from the **REPORT/FILTER** selection box. The first option, **OR/CA Status**, imposes no filters; therefore, the listing will include all occurrence reports selected by the current search profile and status date range criteria. The other options contain filter criteria as described below.

- **OR Status** - Reports that were transmitted within the date range, reports with comments added within the date range, rejected reports, reports awaiting signature, and Final Reports with open corrective actions.
- **New ORs** - Reports that were transmitted within the date range (excluding rejected reports).
- **Rejected ORs -** Rejected reports.
- **Comments** - Reports that have had comments added within the date range.
- **For Action** - Final Reports with open corrective actions and reports awaiting signature.
- **For My Action** - Final Reports with open corrective actions.
- **CA Status** - Update/Final and Final Reports with open corrective actions and Final Reports with corrective action date changes within the date range.
- **Open CAs** - Update/Final and Final Reports with open corrective actions.
- **Changed CAs** - Final Reports with corrective action date changes within the date range.

The following table shows these filters and associated criteria in tabular form. The first column lists the filter. The second and third columns show the criteria associated with each filter. The Boolean logic that applies between the different criteria is also included. The criteria are divided into two columns to distinguish the report status criteria from the status date criteria; however, the Boolean logic continues from one column to the next. Keep in mind when specifying date criteria that the filter date must be within the status date range specified in the **FROM STATUS DATE** and **TO STATUS DATE** sections of the **ORPS MANAGER OR SEARCH & REPORTS** page.

Filter Selection	Report Status Filter	Status Date Filter
OR/CA Status	None	None
OR Status	- Rejected reports *OR* - Reports awaiting signature *OR* - Final Reports with open corrective actions *OR*	- Current report date *OR* - Comment date
New ORs	- *NOT* rejected reports *AND*	- Current report date
Rejected ORs	- Rejected reports	None
Comments	None	- Comment date
For Action	- Final Reports with open corrective actions *OR* - Reports awaiting signature	None
For My Action	- Final Reports with open corrective actions	None
CA Status	- Final Reports with open corrective actions *OR* - Update/Final Reports with open corrective actions *OR*	- Corrective action change date
Open CAs	- Final Reports with open corrective actions *OR* - Update/Final Reports with open corrective actions	None
Changed CAs	None	- Corrective action change date

Report Features

The Facility Manager Report has a few special report features: the **FR Input** hyperlink, the **PM Input** hyperlink, and the **CA DETAIL** command button as shown in **Figure 20**. The **FR Input** and **PM Input** hyperlinks are displayed for reports that contain Facility Representative or Program Manager Comments. The **CA DETAIL** command button is displayed for reports that have open corrective actions or that have had changes to corrective actions (i.e., revised target date or actual completion date) within the date range. These features are discussed below.

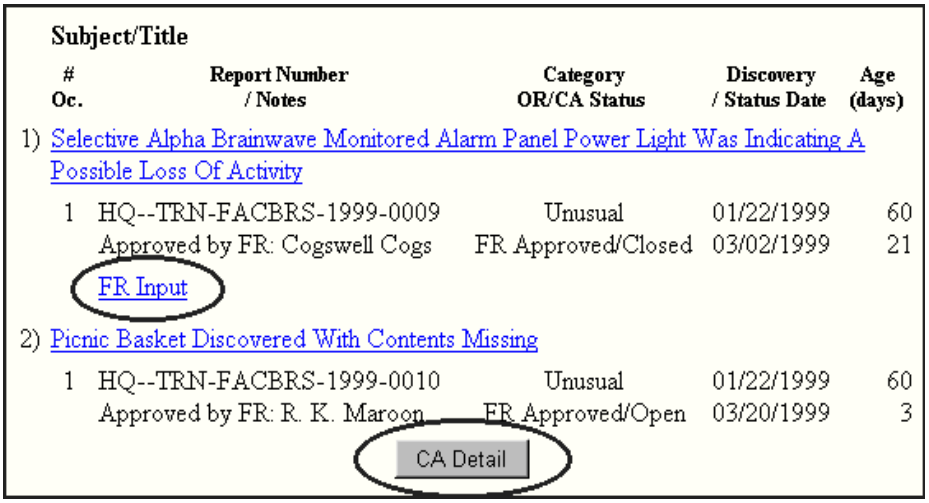


Figure 20 - An example of the **FR Input** hyperlink and the **CA DETAIL** command button in the Facility Manager Report.

Viewing Facility Representative and Program Manager Comments

For any occurrence report in the listing having Facility Representative or Program Manager comments, a **FR Input** or **PM Input** hyperlink is displayed under the **Report Number/Notes** information. Clicking on the **FR Input** hyperlink takes you to the **DOE Facility Representative Input** portion of the occurrence report, and clicking on the **PM Input** hyperlink takes you to the **DOE Program Manager Input** portion of the occurrence report. From this location within the report, you can use the vertical scroll bar to view other portions of the report. To return to the Manager Report, click on the browser's **BACK** toolbar button.

Viewing Corrective Actions

For any occurrence report in the listing having an open corrective action or a changed corrective action (i.e., revised target date or added completion date) within the status date range, a **CA DETAIL** command button is displayed under the **Report Number/Notes** information. Clicking on the command button takes you to a page where you can make updates to the corrective action date, close corrective actions, or view previous changes (**Figure 21**).

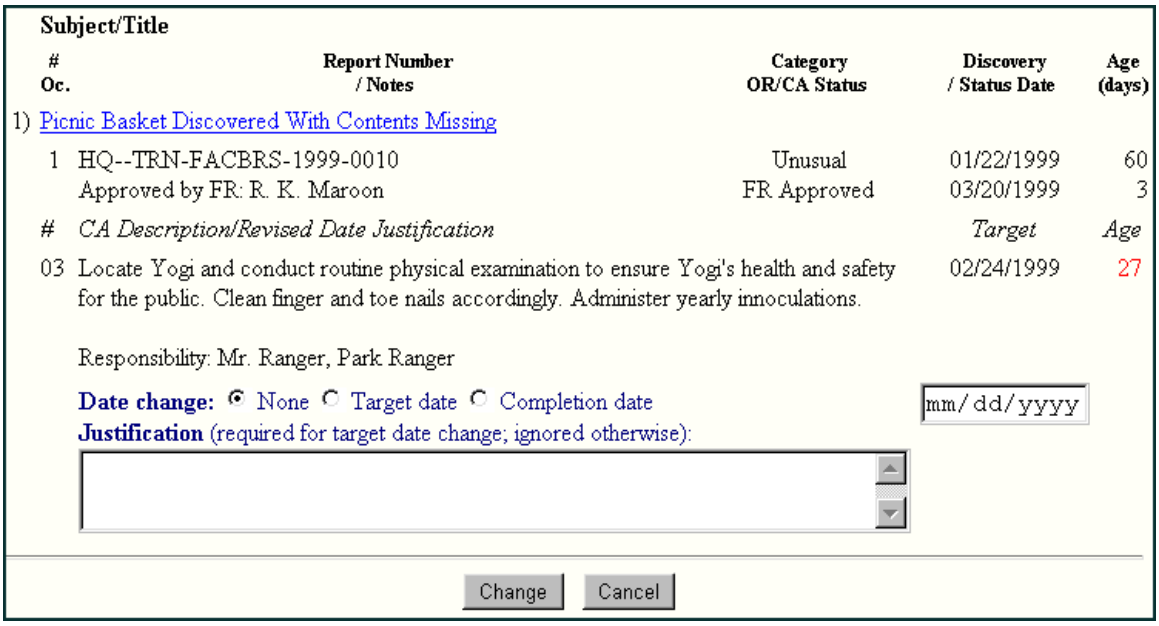


Figure 21 - Example of a page where Facility Managers revise corrective action target dates, close corrective actions, or view previous changes.

This page displays the same information for the occurrence that is displayed on the Manager Report. In addition, the page shows corrective action descriptions, the initial target date for completion, any revised target dates, age of the target dates, and the completion date for a closed corrective action. Both the actual completion date and the date it was made on the system are displayed. Anytime there was a change, both the date and person making the change are shown on the report.

The target date age is number of days from the target date to the current date. The target date age is only displayed for open corrective actions, and ages are shown for both the original target date and the revised target date. If the corrective action is past due, the age is a positive number and is displayed in red. If the target date is still in the future, the age is negative and displayed in black.

Associated with every open corrective action are a set of radio buttons and two edit boxes. Following the corrective action descriptions are two command buttons: **CHANGE** and **CANCEL**. These command buttons are only displayed if the page contains open corrective actions.

At the bottom of the page is the **CA SUMMARY** table that summarizes both open and closed corrective actions by corrective action status (**Figure 22**). The table provides the number of target date changes made to open corrective actions. It also provides a breakdown of the number of corrective actions completed after the report was final and the number of corrective actions completed before the report was final. The total reflects the total of all corrective actions in the report.

CA Summary				
Open/Target Date		Completed		Total
Unchanged	Changed	Before PreFinal	After PreFinal	
1	0	2	0	3

Figure 22 - Example of a corrective action summary table.

Revising a Corrective Action Target Date

To revise a corrective action target date, select the **TARGET DATE** radio button and enter the target date change in the **DATE CHANGE** edit box. The format for the date is mm/dd/yyyy. In addition, you *must* enter a justification for the change in the **JUSTIFICATION** edit box.

NOTE

As you enter text into the **JUSTIFICATION** edit box, you can use the WordScribe spell checking software. WordScribe can be operated in either interactive mode (check-as-you-type) or batch mode (blocked text). Please refer to ***Appendix B - Spell Checking Your Report*** for detailed instructions on using the software.

Click on the **CHANGE** command button to process the change and return to the Facility Manager Report. The **CANCEL** command button will cancel any changes made on the page and return you to the Facility Manager Report.

Closing a Corrective Action

To close a corrective action, select the **COMPLETION DATE** radio button and enter the completion date in the **DATE CHANGE** edit box. The format for the date is mm/dd/yyyy. Click on the **CHANGE** command button to process the change and return to the Facility Manager Report. The **CANCEL** command button will cancel any changes made on the page and return you to the Facility Manager Report.

Step-by-Step

TUTORIAL

Revising a Corrective Action Target Date

1. Select a search profile from the **OR SEARCH CRITERIA** selection box on the **ORPS MANAGER OR SEARCH & REPORTS** page.

2. Select a date range with the **FROM STATUS DATE** and **TO STATUS DATE** sections on the **ORPS MANAGER OR SEARCH & REPORTS** page.

3. Select a report filter from the **REPORT/FILTER** selection box that includes Final Reports with open corrective actions.

HINT

The **OR/CA Status**, **OR Status**, **For Action**, **For My Action**, **CA Status**, and **Open CA** filters will display all reports that meet the search profile and date range criteria with open corrective actions.

4. Click on a **CA DETAIL** command button.

HINT

To display only reports with open corrective actions, select either the **For My Action** or **Open CA** filter. If you use other filters, the **CA DETAIL** page may not display open corrective actions. In that case, return to the Manager Report and select another **CA DETAIL** command button.

5. For an open corrective action, select the **TARGET DATE** radio button and enter the target date change in the **DATE CHANGE** edit box.

6. Enter a justification for the change in the associated **JUSTIFICATION** edit box.

7. Click on the **CHANGE** command button at the bottom of the page.

Step-by-Step

TUTORIAL

Closing a Corrective Action

1. Select a search profile from the **OR SEARCH CRITERIA** selection box on the **ORPS MANAGER OR SEARCH & REPORTS** page.

2. Select a date range with the **FROM STATUS DATE** and **TO STATUS DATE** sections on the **ORPS MANAGER OR SEARCH & REPORTS** page.

3. Select a report filter from the **REPORT/FILTER** selection box that includes Final Reports with open corrective actions.

HINT

The **OR/CA Status**, **OR Status**, **For Action**, **For My Action**, **CA Status**, and **Open CA** filters will display all reports that meet the search profile and date range criteria with open corrective actions.

4. Click on a **CA DETAIL** command button.

HINT

To display only reports with open corrective actions, select either the **For My Action** or **Open CA** filter. If you use other filters, the **CA DETAIL** page may not display open corrective actions. In that case, return to the Manager Report and select another **CA DETAIL** command button.

5. For an open corrective action, select the **COMPLETION DATE** radio button and enter the completion date in the **DATE CHANGE** edit box.

6. Click on the **CHANGE** command button at the bottom of the page.

Exercise 4

As you work, write down the steps you take. These notes will act as a reminder when you take similar actions in the future.

1. Create a Facility Manager Report that lists only Final Reports with open corrective actions using the **My OR Set** search profile and status dates from **Earliest entry** to **Now**.

2. Update a corrective action.

3. Close a corrective action.

Exercise 5

As you work, write down the steps you take. These notes will act as a reminder when you take similar actions in the future.

1. Create a Facility Manager Report that lists only occurrence reports (excluding rejected reports) that were transmitted within the last two weeks.

2. Order the list in descending order by date of last modification.

Appendix A - Search Field Definitions

Search Fields

Field Number	Field Name	Field Description
1	Occurrence Report No.	The Occurrence Report Number is a composite of Field Office identifier, Area Office identifier, Contractor identifier, Facility identifier, Year of Occurrence, and Sequence Number.
2	Operations/Field Office	Every occurrence report must have a DOE Operations/Field Office associated with it.
3	Area Office	An occurrence report may have a DOE Area Office associated with it.
4	Contractor	Every occurrence report must have a contractor associated with it.
5	Facility	Every occurrence report must have a facility associated with it.
6	Report Year	Report Year is the year of the occurrence report number. Since the occurrence report number is automatically assigned when the Notification Report is transmitted to the ORPS database, the Report Year is the year when the Notification Report was transmitted.
7	Sequence Number	The Sequence Number is the sequential number of the occurrence by facility. This number is assigned to the report by the centralized computer system at the time the Notification Report is transmitted. This number contains four digits (e.g., 0004). (Note: It is not necessary to enter leading zeros when entering a number in the edit box.)

Field Number	Field Name	Field Description
8	Report Type	The ORPS GUI can search for four types of reports: Notification Report (N), Update Report (U), Update/Final Report (X), and Final Report (F).
9	Secretarial Office	Every occurrence report must have a DOE Secretarial Office associated with it.
10	Lab/Site/Org	An occurrence report should have a site (or laboratory/organization) associated with it.

Appendix B - Spell Checking Your Report

Obtaining the Spell Check Application

DOE has purchased a multiple-copy license of the WordScribe spell checker for use with the Occurrence Report Data Entry and Manager Functions. This spell checker will be available for you to download and install on your computer without cost. For information on how to obtain a copy of this software, contact the ES&H Helpline at (800) 473-4375. Use of this particular spell check application is not mandatory. If you have another spell checker that will work with your browser, you may use it instead.

Please remember that WordScribe is a commercial software package. The number of licenses purchased, while sufficient to support the ORPS process throughout the DOE complex, is not unlimited and its installation and use should be limited to those workstations that are being used in the creation of ORPS reports. It should not be redistributed to other individuals within your organization.

NOTE

The current version of WordScribe will not work with Internet Explorer. A new version that will work with Internet Explorer is being developed by the manufacturer and will be made available when it is released.

Detailed instructions for installing and configuring WordScribe, along with basic instructions for using the software, are provided in the following sections. The software package also provides on-line helps which will provide additional information on its installation and use.

Installing WordScribe

From the **WINDOWS TASKBAR**, click on **Start** and select **Run**. This will open the **RUN** dialog box shown in **Figure 23**. In the edit box type **a:\wsp_hd.exe**.

(This assumes you are installing from a floppy disk in the A: drive. If you are installing from another location, e.g., your hard drive, replace the A: with the path to the file, e.g., C:\TEMP.)

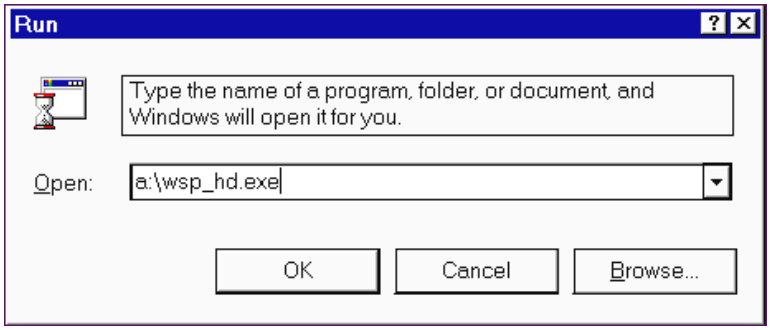


Figure 23 - The **RUN** dialog box.

After you have entered the file name, click on the **OK** button. This will extract the temporary files that are necessary to complete the installation. When the file extraction is complete, the **WORDSCRIBE INSTALLATION** dialog box, shown in **Figure 24**, will be displayed.

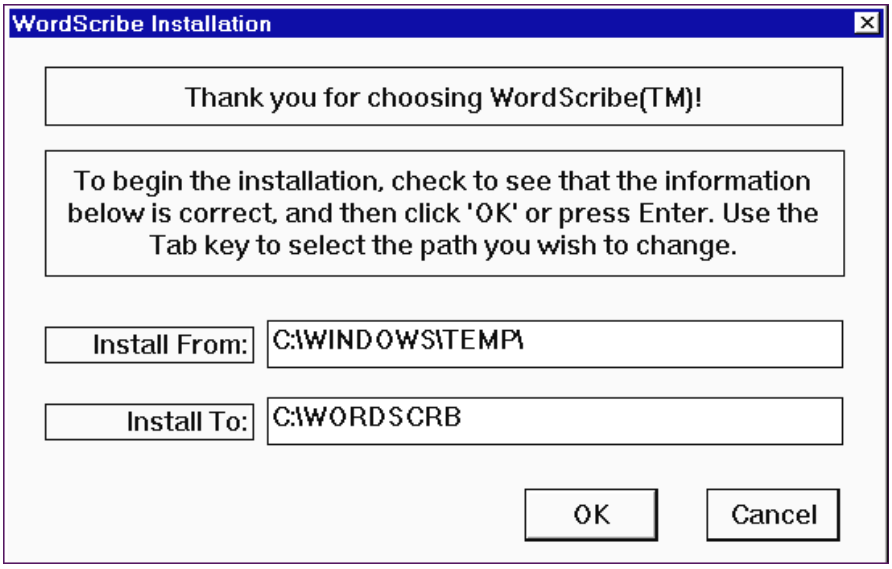


Figure 24 - The **WORDSCRIBE INSTALLATION** dialog box.

You can accept the default values in dialog box and continue with the installation by clicking on the **OK** button; the installation will proceed without any additional prompts. Once the installation is complete, you will see a message box indicating that WordScribe has been installed. Click on the **OK** button in the message box to finish the installation.

At the conclusion of the installation, a How-to document (named Howto.txt) will automatically be displayed in the Windows Notepad. This document describes the basic operation of WordScribe. This document is placed in the **\WORDSCRB** directory during the installation process; you can review it now or at a later time. When you have finished

reviewing the document, close the **NOTEPAD** window by selecting **Exit** from the Notepad **FILE** menu. You will also need to close the **WORDSCRIBE PROGRAM** folder that was created during the installation. This can be done by selecting **Close** from the **FILE** menu.

This completes the installation; from now on, WordScribe will load automatically every time you start Windows and will attach automatically to the programs that have been selected. However, you will probably want to do some configuration of the application before you use it.

To configure WordScribe, go to the **WINDOWS TASKBAR** and click on the **WORDSCRIBE** button. This will open the WordScribe application as shown in **Figure 25**.

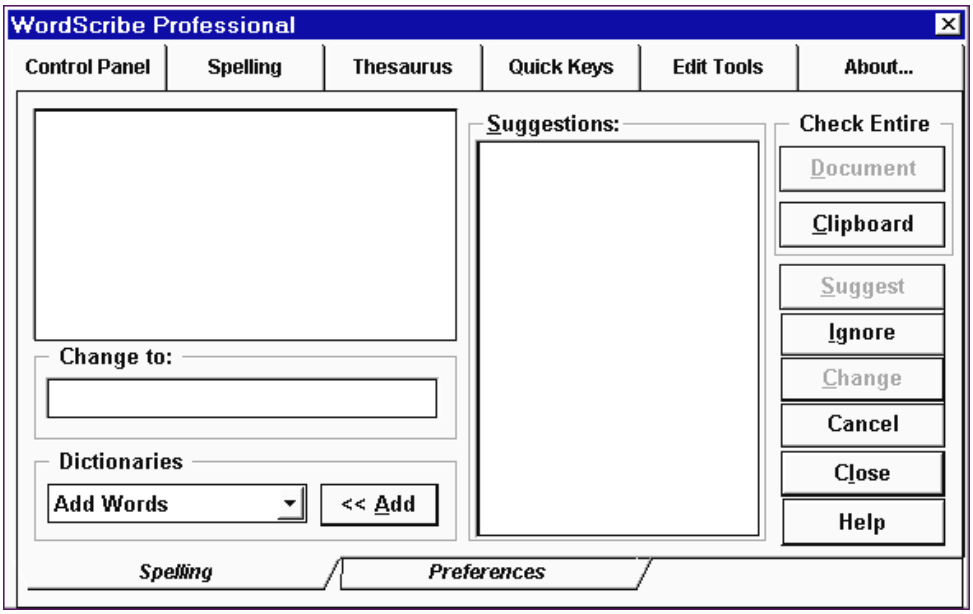


Figure 25 - The **WORDSCRIBE SPELL CHECKING** page.

By default, WordScribe is installed to provide interactive spell checking, i.e., it will notify you each time you enter a misspelled word. If you would rather work in a batch mode, you can change this by clicking on the **PREFERENCES** tab. This will open the page shown in **Figure 26**.

NOTE

If you have configured WordScribe to spell check in an interactive mode, it is not necessary to make the corrections as they are identified. You may wish to use the interactive mode to let you know that there is a problem in your text, and then use the batch mode to make all of the corrections at one time after you have finished entering your text.

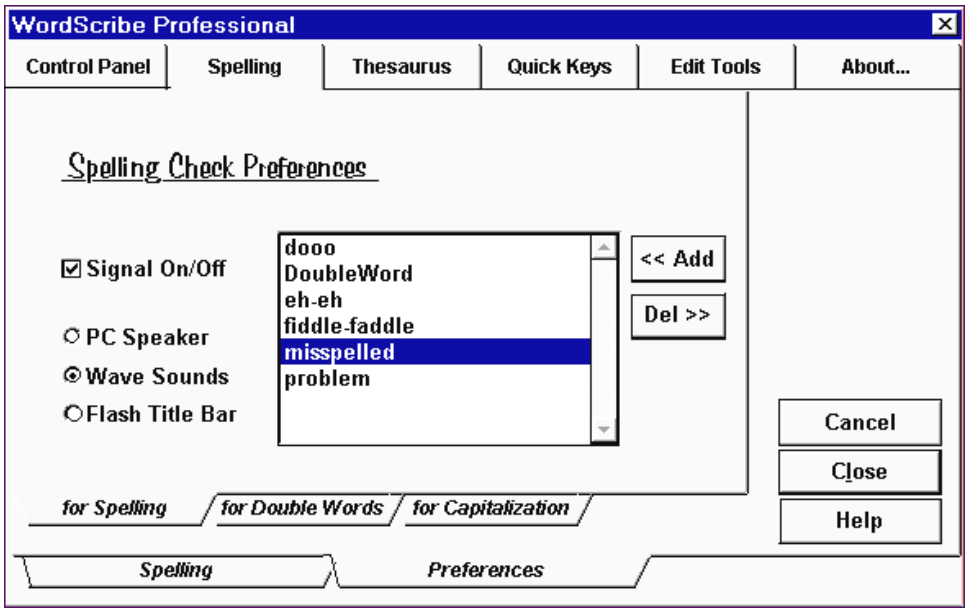


Figure 26 - The **WORDSCRIBE SPELLING PREFERENCES** page.

Preferences are set independently for Spell checking, Double Word checking, and for Capitalization checking. For example, you might want to set Spell checking to batch mode and Double Word checking to interactive. The page shown in **Figure 26** is for the Spelling options. Similar pages are found for Double Word checking and Capitalization checking.

A check mark in the **SIGNAL ON/OFF** checkbox indicates that you want to be informed each time you type a misspelled word. If you want to work strictly in a batch mode with no interactive warnings, simply click on the checkbox to remove the check mark.

The **PREFERENCES** tab is also where you set the type of signal that you will receive when you enter a misspelled word. If you have a sound card you can use the default **Wave Sounds** option to generate a verbal warning. If you do not have a sound card, select **PC Speaker** for an audible warning (a beep) or select **Flash Title Bar** for a visual warning. Note that this only applies if you are configured for an interactive mode, i.e., the **SIGNAL ON/OFF** box is checked.

Next, you need to select the programs that WordScribe will work with. By default, WordScribe will attach itself to many of the programs that are already installed on your computer and will try to work with them. If you want WordScribe to do this, you can leave the selected programs as they are. However, you will probably want to prevent WordScribe from trying to work with some of your applications, in particular those which have their own spell checker (such as WordPerfect) or those where you will be entering primarily non-word data (such as Excel). To change these settings, click the **CONTROL PANEL** tab to access the control panel shown in **Figure 27**.

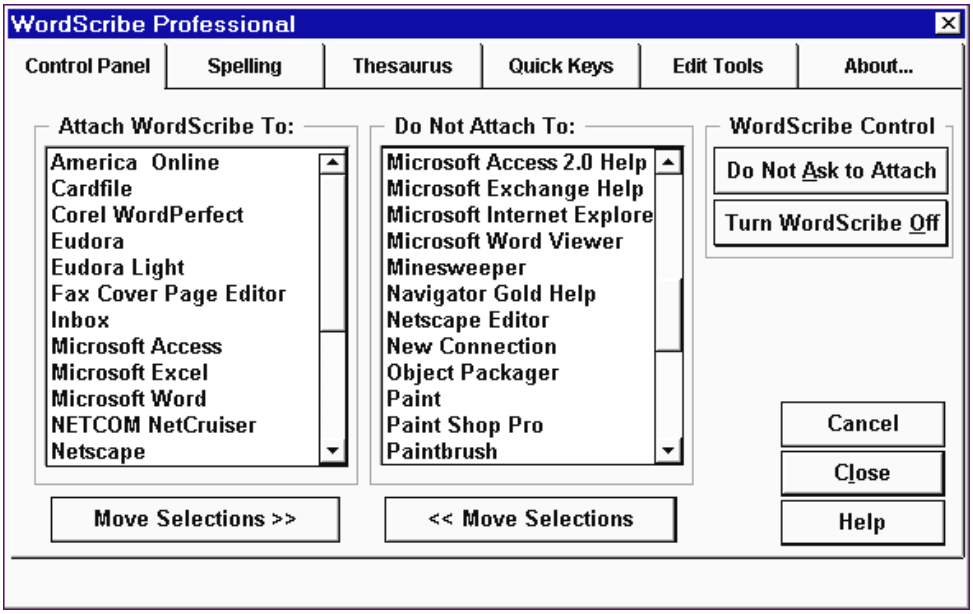


Figure 27 - The **WORDSCRIBE DEFAULT** control panel.

To prevent an application from trying to use WordScribe, click on the name of the application in the left-hand, **ATTACH WORDSCRIBE TO:** window to highlight it. (Multiple applications can be selected by clicking and highlighting multiple names.) Once you have made your selections, click on the **MOVE SELECTIONS>>** button to move the applications into the right-hand, **DO NOT ATTACH TO:** window.

Now, click on the **DO NOT ASK TO ATTACH** button to prevent WordScribe from prompting you any time you open a program that is not attached. You will receive a message box saying, "*WordScribe will no longer attempt to attach to new programs. Are you sure?*" Respond to the resulting message box by clicking the **YES** button. A typical configuration is shown in **Figure 28**.

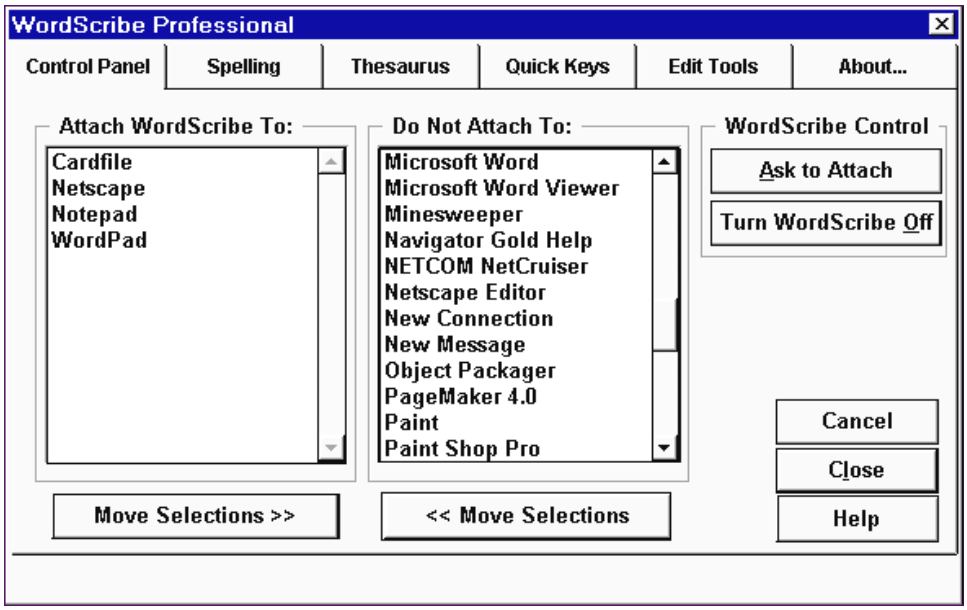


Figure 28 - The suggested **WORDSCRIBE** control panel options.

When you have finished configuring WordScribe, click on the **CLOSE** button to minimize the WordScribe window and resume normal operation.

WARNING

The WordScribe window will not close if you are currently viewing the **SPELLING/PREFERENCES** page. To close WordScribe from this page, first click on the **SPELLING** tab to return to the **SPELLING** page and then click the **CLOSE** button.

Using WordScribe

When you open an application that was attached to WordScribe during the installation process, you should see a feather icon on the menu bar. That indicates that WordScribe is attached and ready to go.

WordScribe can be operated in either an interactive mode (check-as-you-type) or a batch mode (blocked text). When operating in an interactive mode, if you type a word incorrectly you will hear a beep or other warning signal as soon as you complete the word by entering a space or punctuation mark and you can make the corrections as you go. When operating in a batch mode, you manually select a block of text that you want to spell check and then check the entire block at one time.

NOTE

When working in an interactive mode, it is not necessary to correct errors at the time that they are first identified. You can simply note that an error was identified and continue with your input. Once you have completed your input, you can then spell check the entire field in a batch mode and correct all errors at one time.

Spell Checking Interactively

To check your spelling interactively, simply start typing. If you type a word that is not found in the WordScribe dictionary, followed by a space or a punctuation mark that indicates the end of the word, you should hear a beep or other warning signal. When you hear the signal, click on the **FEATHER** icon on the menu bar. This will open the **WORDSCRIBE SPELLING** page, displaying the misspelled word and a list of suggested replacement words, as shown in **Figure 29**.

NOTE

Instead of clicking on the feather, you can also use the keyboard combination of *[CTRL]+[~]* or *[CTRL]+[`]*.

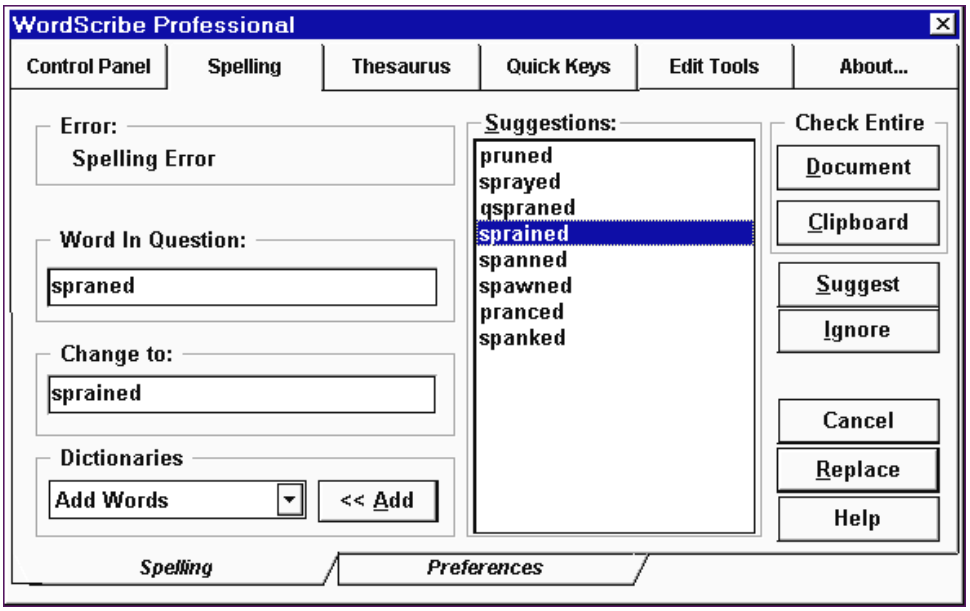


Figure 29 - The spell checker in interactive mode.

Pick the correctly spelled word from the list of suggested words. You can use the mouse pointer to highlight the correct word or use the up and down arrow keys. The selected word will appear in the **CHANGE TO:** box. Then click on the **REPLACE** button or hit the **ENTER** key. You can also double-click on the correct word when you select it. The spelling page will be closed and the misspelled word will be replaced with the correct spelling in your text.

Spell Checking in Batch Mode

If you do not like the distraction of the warnings generated from the interactive checking, you can set WordScribe to operate only in a batch mode. To spell check in a batch mode, you must first highlight the block of text that you wish to check.

NOTE

This is done using standard Windows techniques for selecting text for cutting, copying, or other text management operations. Using the mouse pointer, you can click and drag the desired text to highlight it. You can also use the keyboard to select the text.

Once you have selected the text, click the **FEATHER** icon on the menu to bring up the **WORDSCRIBE SPELLING** page with your selection displayed as shown in **Figure 30**.

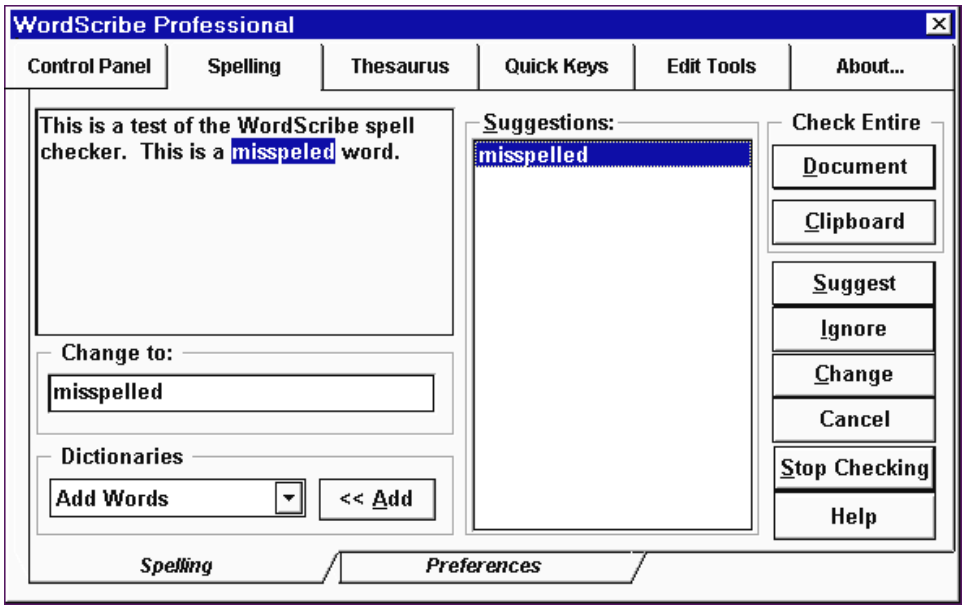


Figure 30 - The spell checker in batch mode.

The first misspelled word, if any, will be highlighted and suggested correct spellings will be displayed. Select one of the suggestions by clicking on it. The selected word will appear in the **CHANGE TO:** box. If none of the choices is the correct one, you can type the correct spelling directly in the **CHANGE TO:** box.

Click on the **CHANGE** button and the new suggestion will replace the misspelled word in the selection. If the word is correctly spelled and just not in the spelling dictionary, you can click on the **IGNORE** button to leave the word as-is and move on to the next misspelled word. WordScribe will continue to check your selection.

Once all words have been checked, you will receive a message box that says the spell check is complete. When this occurs, click on the **OK** button to close the message box, and then click on the **REPLACE** button to paste the corrected selection of text back into your document.

WARNING

WordScribe includes an option for spell checking a complete document. Because the information in ORPS is entered into multiple fields on a form rather than into a single document, this option will not function properly. Instead, you must select and check each section individually.

Editing the Spelling Dictionary

As with any spell checking program, WordScribe includes a limited number of common words in its dictionary. Additional words that you frequently use in your text can be added to the dictionary. If you do this, these words will not continue to generate false misspelling messages.

There are two ways to add words to the dictionary. When you are actually spell checking a word or block of text, the checked word will be displayed in the **CHANGE TO:** box until it is replaced by another word selected from the list. If the word is correct as it is displayed and you wish to add it to your dictionary, simply click on the **<<ADD** button prior to clicking the **REPLACE** button (when in interactive mode) or the **CHANGE** button (when in batch mode).

When you first install WordScribe, you can also add words to the dictionary that you know you will be using before you actually spell check a document. To add words in this manner, open WordScribe by clicking on the **WORDSCRIBE** button on the **TASKBAR**. Type the word to be added to the dictionary in the **CHANGE TO:** box and click on the **<<ADD** button. Repeat this process for each word you wish to add.

Occasionally, you may accidentally add an incorrect word to the spelling dictionary and wish to remove it. Although WordScribe does not have a built-in utility for removing words from the dictionary, you can manually edit the dictionary to remove the undesired words. Words that are added to the dictionary are contained in a file called **ADDWORDS.AD** that is located in the **\WORDSCRB** directory. This file can be opened in a simple text editor such as Notepad. The added words will be displayed, one word per line, with the most recent additions located at the end of the file. To remove a word from the dictionary, simply delete the line containing the undesired word and save the edited file. The word will again be flagged as misspelled the next time it is encountered.

Exercise Solutions

Exercise 1

1. Create a new search profile that contains occurrence reports for the current year for a facility under your authority.
   a. Click on the **NEW** command button in the **OR SEARCH CRITERIA** section of the **ORPS MANAGER OR SEARCH & REPORTS** page.
   b. Click on the **5. FACILITY** and **6. REPORT YEAR** check boxes.
   c. Click on the **REFINE** command button.
   d. Select a facility from the **FACILITY** selection box.
   e. Select **the current year** from the **REPORT YEAR** selection box.
   f. Click on the **FINISH** command button.

2. Save the search profile as **My Facility - Current Year.**
   a. Highlight **Untitled** in the **SAVE AS** edit box and type **My Facility - Current Year.** (Make sure that **Untitled** is selected in the **OR SEARCH CRITERIA** selection box.)
   b. Click on the **SAVE** command button.

3. Delete the search profile titled **My Facility - Current Year**.
   a. Select **My Facility - Current Year** from the **OR SEARCH CRITERIA** selection box. (Make sure that **My Facility - Current Year** is selected in the **OR SEARCH CRITERIA** selection box.)
   b. Click on the **DELETE** command button.

Exercise 2

1. Create a new search profile that contains Update/Final Reports for the current year for all facilities under your authority.
   a. Click on the **NEW** command button in the **OR SEARCH CRITERIA** section of the **ORPS MANAGER OR SEARCH & REPORTS** page.
   b. Click on the **6. REPORT YEAR** and **8. REPORT TYPE** check boxes.
   c. Click on the **REFINE** command button.
   d. Select **the current year** from the **REPORT YEAR** selection box.
   e. Select **X-Update/Final** from the **REPORT TYPE** selection box.
   f. Click on the **FINISH** command button.

2. Save the search profile as **Update/Final - Current Year.**
   a. Highlight **Untitled** in the **SAVE AS** edit box and type **Update/Final - Current Year.**
   b. Click on the **SAVE** command button.

3. Initiate an edit of the search profile titled **Update/Final - Current Year.**
   a. Make sure that **Update/Final - Current Year** is selected in the **OR SEARCH CRITERIA** selection box.
   b. Click on the **EDIT** command button in the **OR SEARCH CRITERIA** section of the **ORPS MANAGER OR SEARCH & REPORTS** page.

4. Change the profile to contain only Final Reports for the current year for all the facilities under your authority.
   a. Select **F - Final** from the **REPORT TYPE** selection box.
   b. Click on the **FINISH** command button.

5. Save the new search profile as **Final Reports - Current Year**.
   a. Highlight **Update/Final - Current Year** in the **SAVE AS** edit box and replace it with **Final Reports - Current Year.**
   b. Click on the **SAVE** command button.

Exercise 3

1. Create a new search profile that contains occurrence reports for DOE Headquarters Operations/Field Office.
   a. Click on the **NEW** command button in the **OR SEARCH CRITERIA** section of the **ORPS MANAGER OR SEARCH & REPORTS** page.
   b. Click on the **2. OPERATIONS/FIELD OFFICE** check box.
   c. Click on the **REFINE** command button.
   d. Select a **HQ - DOE Headquarters** from the **OPERATIONS/FIELD OFFICE** selection box.

2. Specify a status date/time range to be saved with the profile with a beginning date of two weeks prior to today and an ending date of now.
   a. Click on the **USER SPECIFIED** radio button in the **FROM STATUS DATE** section.
   b. Type in the date that is two weeks prior to today's date into the **USER SPECIFIED** edit box.
   c. Click on the **NOW** radio button in the **TO STATUS DATE** section.

3. Display the search specifications.
   a. Click on the **DISPLAY** command button at the bottom of the **ORPS MANAGER OR SEARCH CRITERIA** page.

4. Save the search profile as **DOE HQ - Last 2 Weeks.**
   a. Click on the **CONTINUE** command button or the browser **BACK** toolbar button to exit the display page.
   b. Click on the **FINISH** command button on the **ORPS MANAGER OR SEARCH CRITERIA** page.
   c. Highlight **Untitled** in the **SAVE AS** edit box and type **DOE HQ - Last 2 Weeks**.
   d. Click on the **SAVE** command button.

Exercise 3
(Continued)

5. Specify the date/time range that will start with the beginning of the database and end with the current date and time for generating reports.
   a. Click on the **EARLIEST ENTRY** radio button in the **FROM STATUS DATE** section of the **ORPS MANAGER OR SEARCH & REPORTS** page.
   b. Click on the **NOW** radio button in the **TO STATUS DATE** section.

6. Display the search specifications.
   a. Click on the **DISPLAY** criteria command button in the **REPORTS** section of the **ORPS MANAGER OR SEARCH & REPORTS** page.

7. Specify the date/time range saved with **DOE HQ - Last 2 Weeks** for generating reports.
   a. Click on the **CONTINUE** command button or the browser **BACK** toolbar button to exit the display page.
   b. Click on the **USE SAVED CRITERIA** check box in the **FROM STATUS DATE** section of the **ORPS MANAGER OR SEARCH & REPORTS** page.
   c. Click on the **USE SAVED CRITERIA** check box in the **TO STATUS DATE** section.

8. Display the search specifications.
   a. Click on the **DISPLAY** criteria command button in the **REPORTS** section of the **ORPS MANAGER OR SEARCH & REPORTS** page.

Exercise 4

1. Create a Facility Manager Report that lists only Final Reports with open corrective actions using the **My OR Set** search profile and status dates from **Earliest entry** to **Now**.
   a. From the **ORPS MANAGER OR SEARCH & REPORTS** page, highlight the **My OR Set** search profile in the **OR SEARCH CRITERIA** selection box.
   b. In the **FROM STATUS DATE** section, click on the **Earliest entry** radio button.
   c. In the **TO STATUS DATE** section, click on the **Now** radio button.
   d. Select the **for Action** filter from the **REPORT/FILTER** selection box.
   e. Click on the **PREPARE** report command button.

2. Update a corrective action.
   a. Click on a **CA DETAIL** command button.
   b. Select the **TARGET DATE** radio button and enter the new target date in the **DATE CHANGE** edit box.
   c. Enter the justification text in the **JUSTIFICATION** edit box.
   d. Click on the **CHANGE** command button.

3. Close a corrective action.
   a. Click on a **CA DETAIL** command button.
   b. Select the **COMPLETION DATE** radio button and enter the completion date in the **DATE CHANGE** edit box.
   c. Click on the **CHANGE** command button.

Exercise 5

1. Create a Facility Manager Report that lists only occurrence reports (excluding rejected reports) that were transmitted within the last two weeks.
   a. From the **ORPS MANAGER OR SEARCH & REPORTS** page, highlight the **My OR Set** search profile in the **OR SEARCH CRITERIA** selection box.
   b. In the **FROM STATUS DATE** section, click on the **USER SPECIFIED** radio button and type the date two weeks prior to today into the edit box.
   c. In the **TO STATUS DATE** section, click on the **NOW** radio button.
   d. Select the **New ORs** filter from the **REPORT/FILTER** selection box.

2. Order the list in descending order by date of last modification.
   a. Click on the **DATE** and **DESC** radio buttons in the **REPORTS** section of the **ORPS MANAGER OR SEARCH & REPORTS** page.
   b. Click on the **PREPARE** report command button.

Index

Access 1, B-4
Authority 3, 7, 15, 16, 21, 23, 26, S-1, S-2
Boolean 6, 15, 18, 22-24, 39
    AND operator 24
    OR operator 24
Browser B-1, S-3, S-4
Command Button . . 4-6, 8-11, 13-15, 17-20, 22, 24, 27-31, 34, 35, 41, 42, 44-46, S-1-6
    Count 35
    Display command button 10, 27-30, 35, S-3
    Finish command button 13, 15, 17, 20, 29, 30, S-1-3
    New command button 5, 6, 15, 30, S-1-3
    Prepare 31, 35, S-5, S-6
    Refine command button 6, 8, 9, 15, 18, 22, 24, 30, S-1-3
    Reset command button 6, 31
    Save command button 13, 15, 17, 20, 29, 30, S-1-3
    Screen command button 11, 19, 34
Computer System A-1
    HP ORPS 4
    ORPS GUI 3, 6, 26, 27, A-2
Control Panel 1-5, 25, 26, 28, 31, 33-35, B-4-6
    Date Range 1, 4, 17, 18, 20, 35, 36, 39, 41, 42, 45, 46
Corrective Actions 39-43, 45-47, S-5
Definitions A-1
Display 9, 10, 14, 22, 24, 27-30, 32, 35, 45, 46, S-3, S-4
    Criteria 1-15, 17-20, 22-24, 26-31, 33-36, 39, 45, 46, S-1-6
Edit 1-3, 6, 13, 15, 17-27, 29-31, 34, 43-46, B-9, S-1-3, S-5, S-6
Exclusions
    Cancelled 38
Facility Manager 1, 2, 4, 36, 37, 41, 44, 47, 48, S-5, S-6
Fields 5, 6, 9, 15, 17, 18, 22, 23, 30, A-1, B-9
Help 6
Profile 1, 3-6, 8-21, 23, 27-36, 39, 45-47, S-1-3, S-5, S-6
Report Categorization
    Emergency 38
    Unusual 38
Report Type 6, 33, S-2
    Final 6, 21, 38-41, 43, 45-47, S-2, S-5
    Notification A-1, A-2
    Update/Final 6, 21, 39, 40, S-2
Reports 1-5, 8, 9, 11-17, 20, 21, 23, 26-33, 35, 36, 38-41, 45-48, A-2, S-1-6

CA Status 31, 36-40, 45, 46
Comments 1, 39-42
Elements 24, 35
Features 6, 20, 22, 41
Filters 35, 39, 45, 46
Manager 1, 1, 2, 4-9, 11-15, 17-20, 22-24, 27-31, 33, 35-37, 39, 41-48, S-2-6
OR Status 35, 36, 39, 40, 45, 46
Save As 13, 15, 17, 20, 30, S-1-3
Screen
Exclude 9, 11, 12, 23, 34, 35, S-3
Include 6, 9, 11, 25, 34, 35, 39, S-3
Search 1-36, 39, 45-47, A-1, A-2, S-1-6
Search fields 5, 6, 9, 15, 17, 18, 22, 23, 30, A-1
Search Criteria 1-15, 17-20, 22-24, 26, 27, 29-31, 33, 45, 46, S-1-3, S-5, S-6
Delete command button 14, S-1
Edit command button 17, 20, 29, 34, S-2
Spell Check B-1, B-3, B-6-9
Batch mode 44, B-3, B-4, B-6-9
Dictionary B-7-9
Interactive 44, B-3, B-4, B-6-9
WordScribe 44, B-1-9
Status date
Status date 2-6, 9, 10, 17, 18, 20, 25-36, 38-40, 42, 45, 46, S-3-6
User Classifications
Facility Manager 1, 2, 4, 36, 37, 41, 44, 47, 48, S-5, S-6
Facility Representative 1, 41, 42
Program Manager 1, 41, 42
Viewing 42, B-6
WordScribe
Feather B-6-8