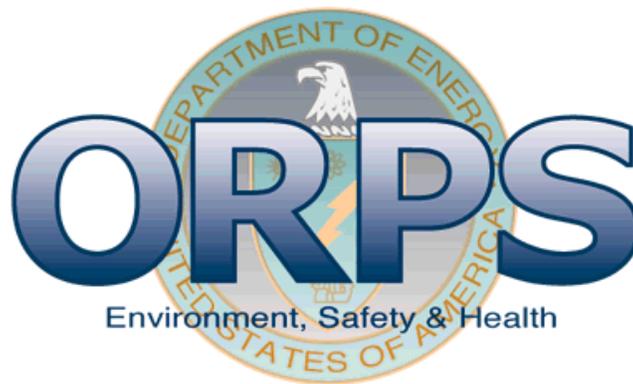


# ORPS GUI Basic Search Techniques



*April, 1999*

**ORPS GUI Reference Manual**



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# Introduction

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## Purpose of the Course

In this class you will learn the specifics of composing a basic search query and initiating a search. You will learn about selection boxes, how to specify a date range, and how to use Boolean logic operators to refine a search. In addition, you will learn how to create and save search criteria, how to preview and discard (or keep) selected records, and the basics of composing narrative text searches using text operators, modifiers, and wildcards.

## Objectives

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

- ▶ Explain the purpose of the **ORPS OR SEARCH & REPORTS** control panel
- ▶ Create, save, edit, and delete a search profile
- ▶ Utilize the **ORPS OR SEARCH CRITERIA** page to specify search fields and values to query the ORPS database
- ▶ Use the basic Boolean, date, and narrative search features of the ORPS GUI

# ORPS OR Search & Reports Page

## The Control Panel

The **ORPS OR SEARCH & REPORTS** page is accessed from the **OCCURRENCE REPORTING AND PROCESSING** home page by clicking on the **Search & Reports** hyperlink. Search and report operations are initiated from the **ORPS OR SEARCH & REPORTS** control panel (see **Figure 1**). This page functions as a control panel by allowing you to select search criteria, report options, and other selections to further refine your query.

**ORPS OR Search & Reports** ?

[SCOTT, BONNIE R](#)

ORPS contains 36621 OR(s) with 38768 occurrences(s) as of 02/26/1999 11:45.

| OR Search Criteria ?                            |   | Reports ?  |
|---|---|--|
| <input type="button" value="New"/>              | Entire DB                                     | Report/Filter<br>OR List   |
| <input type="button" value="Edit"/>             | 96 ID Procedure Root Cause                    | Order by<br><input checked="" type="radio"/> OR # <input type="radio"/> Date |
| <input type="button" value="Delete"/>           | ALB HQ 1998                                   | <input checked="" type="radio"/> Asc <input type="radio"/> Desc              |
| <input type="button" value="Save as"/>          | ALO 1997 Final                                | 10 items/page  |
|   | ALO 97 Procedure Problem Root                 | <input type="button" value="Prepare report"/>                                |
| <b>from DB as of ?</b>                          | <b>to DB as of ?</b>                          | <input type="button" value="Display criteria"/>                              |
| <input type="checkbox"/> Use saved criteria     | <input type="checkbox"/> Use saved criteria   | <input type="button" value="Count ORs"/>                                     |
| <input checked="" type="radio"/> Earliest entry | <input checked="" type="radio"/> Now          |  |
| <input type="radio"/> Last login                | <input type="radio"/> Last login              |  |
| <input type="radio"/> User specified            | <input type="radio"/> User specified          |  |
| mm/dd/yyyy hh:mm                                | 02/26/1999 11:49                              |  |
|   | <input type="checkbox"/> UCNI                 |  |
|   | <input checked="" type="checkbox"/> Cancelled |  |
|   | <input type="checkbox"/> USEC                 |  |
|   | <input type="button" value="Clear"/>          | <input type="button" value="Reset"/>   |

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



A **Search & Reports** 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.

In general, the control panel is used in the following ways:

- To create, edit, save, or delete a set of search specifications
- To generate reports based on the occurrence reports selected with a set of search specifications

The control panel is divided into five sections: **OR SEARCH CRITERIA**, **REPORTS**, **FROM DB AS OF**, **TO DB AS OF**, and **EXCLUDING**. The **REPORTS** sections allows you to generate reports based on the occurrence reports selected with a set of search specifications. The **REPORTS** section of the control panel is discussed in the *ORPS GUI Basic Report Techniques* section of this manual.

The two **DB AS OF** sections allow you to filter your selections based on date ranges (based on system generated time stamps). This feature gives you the ability to view reports as they existed within a certain date/time period, or to only view reports that have changed since you last logged on.

The **EXCLUDING** section allows you to exclude certain types of reports. By default, canceled reports are excluded. The **DB AS OF** and **EXCLUDING** sections of the control panel are discussed further in the *Advanced ORPS Search and Reports Techniques* section of this manual.

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

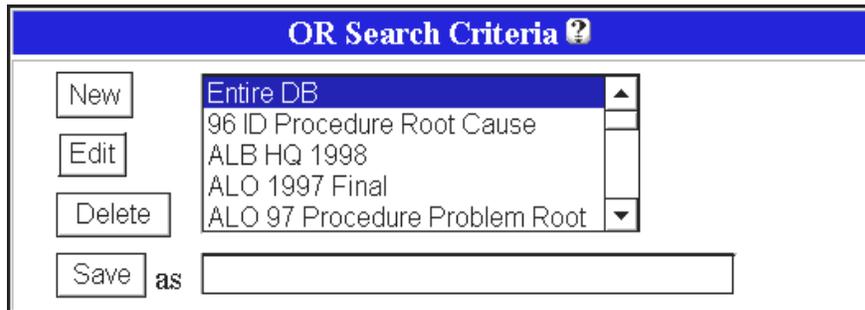
| Command Button  | Function   |
|---|--|
|  | The <b>CLEAR</b> command button restores all the defaults on the page (i.e., <b>FROM DB AS OF</b> is <b>Earliest entry</b> ; <b>TO DB AS OF</b> is <b>Now</b> ; <b>OR List</b> is the highlighted report in the <b>REPORT/FILTER</b> selection box; <b>ORDER BY</b> is set to <b>OR#</b> and <b>Asc</b> ; <b>ITEMS PER PAGE</b> is set to <b>10</b> ; <b>Entire DB</b> is the highlighted profile in the <b>OR SEARCH CRITERIA</b> selection box). |
|  | The <b>RESET</b> command button resets selections made on the control panel to the values that were set when the page was last loaded.   |

For the purposes of this course, we will focus specifically on the **OR SEARCH CRITERIA** section of the control panel. The **OR SEARCH CRITERIA** section allows you to create, edit, save, or delete a set of search specifications.

## The Search Profile

All operations performed in the control panel are based on a set of search specifications called a *search profile*. You may select, create, edit, save, and delete search profiles in the **OR SEARCH CRITERIA** section (see **Figure 2**) of the control panel.

A predefined profile named **Entire DB** is always included in the profile list. **Entire DB** cannot be edited or deleted; however, any exclusions or database date ranges specified will apply to this profile. **Entire DB** can only be selected and used to create distribution and graphic reports.



**Figure 2** - The **OR SEARCH CRITERIA** section of the **ORPS 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   |
|---|--|
|  | Takes you to the <b>ORPS OR SEARCH CRITERIA</b> page where you may define the search specifications for a new search profile.  |
|  | Recalls the search specifications saved in a selected search profile and places the specifications in a new OR search profile. |
|  | Removes the selected search profile.   |
|  | 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 OR SEARCH & REPORTS** control panel. You will be presented with the **ORPS OR SEARCH CRITERIA** page (see **Figure 3**), where you may specify the search fields for the new search. You are also permitted to select date ranges (**DB AS OF** sections) or exclusions (**EXCLUDING** section) that are saved with the new set of criteria.

### ORPS OR Search Criteria ?

[SCOTT, BONNIE R](#)

ORPS contains 36621 OR(s) with 38768 occurrences(s) as of 02/26/1999 11:45.

| Identification <span style="float: right;">?</span>   | Chronology <span style="float: right;">?</span>   | Narrative <span style="float: right;">?</span>   |
|---|---|--|
| <div style="border: 1px solid gray; padding: 2px;"> <div style="background-color: #003366; color: white; padding: 2px;">No Selection</div> <div style="padding: 2px;">                     1. Occurrence Report No.<br/>                     2. Operations / Field Office<br/>                     3. Area Office<br/>                     4. Contractor<br/>                     5. Facility<br/>                     6. Report Year                 </div> </div> | <div style="border: 1px solid gray; padding: 2px;"> <div style="background-color: #003366; color: white; padding: 2px;">No Selection</div> <div style="padding: 2px;">                     25. Current Report<br/>                     26. Last Modification<br/>                     27. Discovery<br/>                     28. Categorization<br/>                     29. HQ EOC Notification<br/>                     30. Other Notifications                 </div> </div> | <div style="border: 1px solid gray; padding: 2px;"> <div style="background-color: #003366; color: white; padding: 2px;">No Selection</div> <div style="padding: 2px;">                     43. All Narrative<br/>                     44. Subject / Title<br/>                     45. Originator Title<br/>                     46. FM Title<br/>                     47. Plant Area<br/>                     48. Division or Project                 </div> </div> |

? **Boolean** logic specification:

| from DB as of <span style="float: right;">?</span>  | to DB as of <span style="float: right;">?</span>   | excluding <span style="float: right;">?</span>   |
|---|--|--|
| <input type="checkbox"/> Use saved criteria<br><input checked="" type="radio"/> Earliest entry<br><input type="radio"/> Last login<br><input type="radio"/> User specified<br><input style="width: 80%;" type="text" value="mm/dd/yyyy hh:mm"/> | <input type="checkbox"/> Use saved criteria<br><input checked="" type="radio"/> Now<br><input type="radio"/> Last login<br><input type="radio"/> User specified<br><input style="width: 80%;" type="text" value="02/26/1999 12:01"/> | <input type="checkbox"/> Use saved criteria<br><input type="checkbox"/> UCNI<br><input checked="" type="checkbox"/> Cancelled<br><input type="checkbox"/> USEC |

**Figure 3** - The **ORPS OR SEARCH CRITERIA** page.

## Selecting Search Fields

The list of searchable fields are displayed in the three selection boxes listed across the top of the page. The **IDENTIFICATION** selection box contains the general identification fields, the **CHRONOLOGY** selection box contains the date and time fields, and the **NARRATIVE** selection box contains the narrative fields. Descriptions of the search fields are found in the **Appendix A** of this section of the manual 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).

### NOTE



A thorough understanding of the data and the Occurrence Reporting process will greatly enhance your ability to formulate meaningful search profiles. For example, if you want to include in your search profile all “open” reports, you need to specify Notification Report (N), Update Report (U), or Update/Final Report (X) from the **Report Type** search field.

Executing the **NEW** command button loads a page with default selections. Note that the default in the selection boxes is **No Selection**. As the name implies, this section indicates that no search fields are selected.

To select a field, simply click with the left mouse button on the desired entry in the selection box. A range of choices may be selected by holding down the left mouse button and dragging the mouse over the range of selections, or by selecting the choice at one end of the range and then doing a *[SHIFT]+[CLICK]* on the choice at the other end of the range. Multiple, nonsequential selections may be made (or removed) by doing a *[CTRL]+[CLICK]* on the desired choices. A selected item may be deselected by doing a *[CTRL]+[CLICK]*.

By default, fields selected from the selection boxes have the Boolean operator *AND* applied *between* the selection box(es). You may use the **BOOLEAN LOGIC SPECIFICATION** edit box to specify the *OR* or *NOT* operators (or a combination of all three operators) between fields. This edit box is discussed further in the **Search Features** section of this manual.

You may 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 all selections except those in the two **DB AS OF** sections and the **EXCLUDING** section. The **CLEAR** command button will clear all selections and restore the page to the default settings. You may 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 in your search, you are ready to refine the profile.

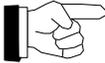


The **RESET** command button **ONLY** resets selections on the page to the values that existed when the page was last entered or refined. It does not reset the values to the default selections that are displayed when you initially enter the **ORPS OR SEARCH CRITERIA** page. If you want to start over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

## Refining a Search Profile

Clicking on the **REFINE** command button on the **ORPS OR SEARCH CRITERIA** page dynamically recreates the search screen to reflect the search field selections made on the previous search page. Note that the default in the selection boxes is **Any**. This selection represents a default of all selections.

NOTE



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

**Figure 4** shows the page that is dynamically recreated after selecting **Operations/Field Office** and **Report Year** as the search fields, and subsequently specifying **Albuquerque Operations, DOE Headquarters, and 1997** as the values within those fields. Based on the previous discussion, the logic for this search is (Operations/Field Office = Albuquerque Operations *OR* Operations/Field Office = DOE Headquarters) *AND* (Report Year = 1997).

| Identification ?  | Chronology ?   | Narrative ?  |
|---|--|--|
| No Selection<br>1. Occurrence Report No.<br><b>2. Operations / Field Office</b><br>3. Area Office<br>4. Contractor<br>5. Facility<br><b>6. Report Year</b>  | No Selection<br>25. Current Report<br>26. Last Modification<br>27. Discovery<br>28. Categorization<br>29. HQ EOC Notification<br>30. Other Notifications   | No Selection<br>43. All Narrative<br>44. Subject / Title<br>45. Originator Title<br>46. FM Title<br>47. Plant Area<br>48. Division or Project                  |
| <b>Boolean</b> logic specification: <input type="text"/><br>Default logic: 2 and 6  |  |  |
| from DB as of ?   | to DB as of ?  | excluding ?  |
| <input type="checkbox"/> Use saved criteria<br><input checked="" type="radio"/> Earliest entry<br><input type="radio"/> Last login<br><input type="radio"/> User specified<br><input type="text" value="mm/dd/yyyy hh:mm"/> | <input type="checkbox"/> Use saved criteria<br><input checked="" type="radio"/> Now<br><input type="radio"/> Last login<br><input type="radio"/> User specified<br><input type="text" value="02/26/1999 12:12"/> | <input type="checkbox"/> Use saved criteria<br><input type="checkbox"/> UCNI<br><input checked="" type="checkbox"/> Cancelled<br><input type="checkbox"/> USEC |
| <b>2. Operations / Field Office</b>   |  |  |
| <input type="text" value="Any"/><br>ALO - Albuquerque Operations<br>CH - Chicago Operations<br><b>HQ - DOE Headquarters</b>   |  |  |
| <b>6. Report Year</b>   |  |  |
| <input type="text" value="Any"/><br>1999<br>1998<br><b>1997</b>   |  |  |

**Figure 4** - Example of dynamically created **ORPS OR SEARCH CRITERIA** page.

After specifying the field values, you may click again on the **REFINE** command button. The search screen is recreated to reflect the search field selections in addition to the values selected on the previous search page. Also, the total number of occurrence reports and occurrences found by the search is listed near the top of the page along with the name of the search profile (see **Figure 5**).

ORPS contains 36621 OR(s) with 38768 occurrences(s) as of 02/26/1999 12:00.  
 Query selected 463 OR(s) with 491 occurrence(s) through 02/26/1999 12:12 using criteria "Untitled".

| Identification ?                    | Chronology ?            | Narrative ?             |
|-------------------------------------|-------------------------|-------------------------|
| No Selection                        | No Selection            | No Selection            |
| 1. Occurrence Report No.            | 25. Current Report      | 43. All Narrative       |
| <b>2. Operations / Field Office</b> | 26. Last Modification   | 44. Subject / Title     |
| 3. Area Office                      | 27. Discovery           | 45. Originator Title    |
| 4. Contractor                       | 28. Categorization      | 46. FM Title            |
| 5. Facility                         | 29. HQ EOC Notification | 47. Plant Area          |
| 6. Report Year                      | 30. Other Notifications | 48. Division or Project |

? Boolean logic specification:  Default logic: 2 and 6

| from DB as of ?                                 | to DB as of ?                                 | excluding ?                                   |
|---|---|---|
| <input type="checkbox"/> Use saved criteria     | <input type="checkbox"/> Use saved criteria   | <input type="checkbox"/> Use saved criteria   |
| <input checked="" type="radio"/> Earliest entry | <input checked="" type="radio"/> Now          | <input type="checkbox"/> UCNI                 |
| <input type="radio"/> Last login                | <input type="radio"/> Last login              | <input checked="" type="checkbox"/> Cancelled |
| <input type="radio"/> User specified            | <input type="radio"/> User specified          | <input type="checkbox"/> USEC                 |
| <input type="text" value="mm/dd/yyyy hh:mm"/>   | <input type="text" value="02/26/1999 12:12"/> |   |

**2. Operations / Field Office**

Any  
 ALO - Albuquerque Operations  
 CH - Chicago Operations  
 HQ - DOE Headquarters

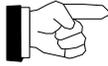
**6. Report Year**

Any  
 1999  
 1998  
 1997

New Refine Screen Display Finish Clear Reset

**Figure 5** - Example of dynamically created **ORPS OR SEARCH CRITERIA** page with totals listed at the top of the page.

NOTE



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



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

The last **REFINE** cause three command buttons to be added at the bottom of the page (for a total of seven buttons). Each is briefly explained in the following table.

| Command Button  | Function   |
|---|--|
|    | Allows you to initiate the creation of a search profile. (Clears all selections on the page except those in the <b>FROM DB AS OF</b> and <b>TO DB AS OF</b> date sections and the <b>EXCLUDING</b> section.) |
|    | Recreates the <b>ORPS OR SEARCH CRITERIA</b> page to reflect selection areas for the search fields specified on the previous page. This allows you to refine the search profile by defining field values.    |
|  | Allows you to selectively include or exclude reports from the search.  |
|  | Displays the search specifications for the current search profile.   |
|  | Finishes the search refinement and returns you to the <b>ORPS OR SEARCH &amp; REPORTS</b> control panel.   |
|  | Clears all selections and restores all the defaults on the page.   |
|  | Resets the selections on the page to the values that existed when the page was last loaded.  |

## Displaying Search Specifications

You may 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, exclusions, and database (DB) date ranges (see **Figure 6**).

**ORPS Display Search Criteria**

---

Profile: "Untitled"

(Operations / Field Office='ALO' or Operations / Field Office='HQ') and Report Year='1997'  
and exclude Cancelled  
and last modified through DB as of 02/26/1999 12:12

---

[ORPS Home](#)      [Search & Reports](#)      [Authorities](#)      [Help](#)

**Figure 6** - The ORPS DISPLAY SEARCH CRITERIA page.

## Screening a Search Profile

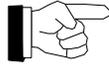
Clicking on the **SCREEN** command button on the **ORPS OR SEARCH CRITERIA** page will take you to the **ORPS SCREEN OR SEARCH CRITERIA** page (see **Figure 7**). This page is dynamically created based on the selections made on the **ORPS OR SEARCH CRITERIA** page. The total number of occurrence reports and 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 may link to an individual report by clicking on the **Subject/Title** hyperlink. Two radio buttons, **EXCLUDE** and **INCLUDE**, appear at the top of the page. These buttons allow you to either exclude or include a record from the ORPS search selection. The **EXCLUDE** radio button (the default selection) will “exclude” any records from the search selection that contain a check mark in the check box to the left of the **Subject/Title**. Alternately, the **INCLUDE** radio button will “include” only those records containing a check mark.

| <b>ORPS Screen OR Search Criteria</b>   |                             |                        |
|---|-----------------------------|------------------------|
| ORPS contains 36621 OR(s) with 38768 occurrences(s) as of 02/26/1999 15:15.<br>Query selected 463 OR(s) with 491 occurrence(s) through 02/26/1999 12:12 using criteria<br>"Untitled". |                             |                        |
| Check any item(s) your wish to <input checked="" type="radio"/> exclude or <input type="radio"/> include.   |                             |                        |
| <b>Subject/Title</b>  | <b>Report Number</b>        | <b>Occurrence Date</b> |
| <input type="checkbox"/> 1) <a href="#">Possible Compromise Of CNSI Document</a>  | ALO--GOAL-ALMSD-1997-0001   | 05/01/1997             |
| <input type="checkbox"/> 2) <a href="#">Potential Compromise of Confidential RD Information</a>   | ALO--GOAL-ALMSD-1997-0002   | 10/22/1997             |
| <input type="checkbox"/> 3) <a href="#">Potential Compromise of Confidential FRD Information</a>  | ALO--GOAL-ALMSD-1997-0003   | 11/06/1997             |
| <input type="checkbox"/> 4) <a href="#">Buried Electrical Cable Cut During Ripping Operations at UMTRA Millsite near Tuba City, Arizona</a>   | ALO--MCTC-GJPOTAR-1997-0001 | 01/02/1997             |
| <input type="checkbox"/> 5) <a href="#">Shipment of Radioactive Soil Samples in Noncompliance with DOT Hazardous Materials Regulations</a>  | ALO--MCTC-GJPOTAR-1997-0002 | 02/05/1997             |

**Figure 7** - Example of a dynamically created **ORPS SCREEN OR SEARCH CRITERIA** page.

NOTE



The “SCREEN” feature in the ORPS GUI may be very useful in refining a narrative search. A narrative search will almost always result in the recovery of non-applicable records, and the “Screen” option may be used to review the results of a narrative search and eliminate the non-applicable records before generating a report.

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   |
|--|--|
| <input type="button" value="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.               |
| <input type="button" value="Display"/> | Displays the search specifications for the current search. Refinements made from the <b>ORPS SCREEN OR SEARCH CRITERIA</b> page become part of the current search profile.     |
| <input type="button" value="Finish"/>  | Finishes the screening and returns you to the <b>ORPS OR SEARCH &amp; REPORTS</b> control panel.   |
| <input type="button" value="Clear"/>   | Restores all the defaults on the <b>ORPS SCREEN OR SEARCH CRITERIA</b> page (i.e., all checks are removed from the check boxes and the <b>EXCLUDE</b> radio button is marked.) |
| <input type="button" value="Reset"/>   | Resets the selections on the page to values that existed when the page was last loaded or refined.   |

NOTE

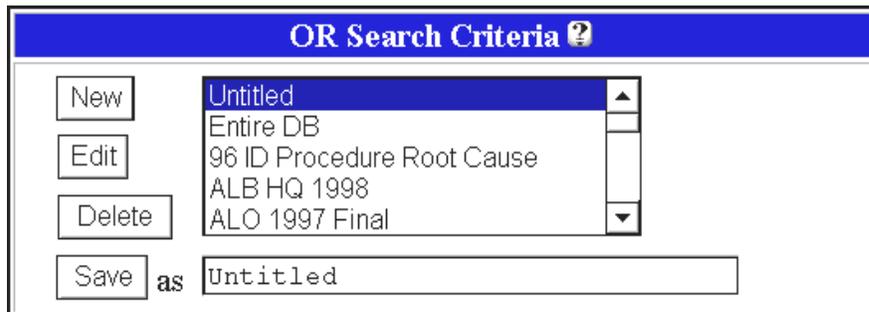


The **Screen** information (i.e., reports that you have chosen to either “exclude” or “include”) is saved with the search profile and may be edited later on.

## Finishing a Search Profile

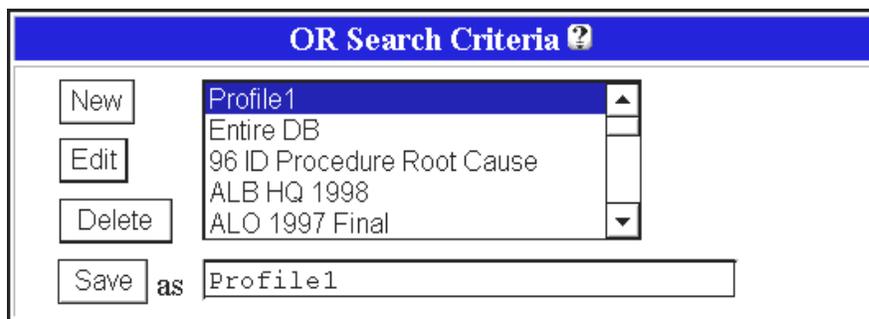
Clicking on the **FINISH** command button on either the **ORPS OR SEARCH CRITERIA** page or the **ORPS SCREEN OR SEARCH CRITERIA** page processes the selections and returns you to the **ORPS OR SEARCH & REPORTS** control panel.

A new search profile has been added to the **OR SEARCH CRITERIA** selection box (see **Figure 8**). It is a temporary file (named **Untitled**) that may be used as the criteria to generate reports. (The ORPS GUI report features are discussed in the ***ORPS GUI Basic Report Techniques*** section of this manual.)



**Figure 8** - A temporary, unsaved search profile.

If desired, you may save the search profile for future use by typing a name in the **SAVE AS** edit box and clicking on the **SAVE** command button. The typed name will appear in the selection box in place of **Untitled** (see **Figure 9**). A maximum of 32 characters and spaces is allowed in the profile name. There is no limit on the number of profiles that may be saved.

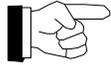


**Figure 9** - A saved search profile.



“Untitled” is a reserved name and may not be used as the title of any saved search criteria.

NOTE

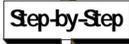


The exclusions (on the **EXCLUDING** section of the control panel) in effect at the time the search profile is saved are saved with the profile.

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



Do not insert a trailing space after the search profile name. If there is a trailing space, you will be unable to delete the profile name from your list.



## TUTORIAL

### Creating and Saving a New Search Profile

1. From the **ORPS GUI** home page, click on the **Search & Reports** hyperlink.
2. Click on the **NEW** command button in the **ORPS SEARCH CRITERIA** section of the **ORPS OR SEARCH & REPORTS** page.
3. Select search fields from the **IDENTIFICATION**, **CHRONOLOGY**, and **NARRATIVE** selection boxes on the **ORPS OR SEARCH CRITERIA** page.

REMINDER: The default Boolean operator *between* selection boxes is *AND*.

4. Click on the **REFINE** command button at the bottom of the page.
5. Specify search field values from the recreated **ORPS OR SEARCH CRITERIA** page.

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

6. Click on the **FINISH** command button at the bottom of the page.
7. Verify that **Untitled** is selected from the **OR SEARCH CRITERIA** selection box in the **OR SEARCH CRITERIA** section of the **ORPS OR SEARCH & REPORTS** page.
8. Type a search profile name in the **SAVE AS** edit box in the **OR SEARCH CRITERIA** section of the **ORPS OR SEARCH & REPORTS** page.

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

9. Click on the **SAVE** command button in the **OR SEARCH CRITERIA** section of the **ORPS 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 that have been rejected five or more times for the Idaho Operations Field Office.
2. Save the search profile as **Idaho Rejected**.
3. Delete the search profile titled **Idaho Rejected**.

## 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 occurrence reports for the Nevada Test Site facility (NTS) categorized into the Nature(s) of Occurrence groupings 03 or 04.



For selection boxes containing numerous items, click in the box and then type the initial character of the desired item (e.g., **N**). You will be taken to the first item containing the initial character specified.



When a selection box contains nested field values (e.g., categories and subcategories), you may select all subcategory values by selecting the higher level category.

2. Save the search profile as **NTS Personnel Safety & Rad.**
3. Delete the search profile titled **NTS Personnel Safety & Rad.**

### 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 1997 occurrence reports for the Los Alamos National Laboratory that required further evaluation of the occurrence before further operation. View the selected occurrences before saving the search profile.



#### HINT

For selection boxes containing numerous items, click in the box and then type the initial character of the desired item (e.g., **L**). You will be taken to the first item containing the initial character specified.

2. Save the search profile as **LANL 1997 Before Operation**.
3. Delete the search profile titled **LANL 1997 Before Operation**.

---

## Editing a Search Profile

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

When you select the **EDIT** command button to edit an unsaved search profile, you will be returned to the **ORPS OR SEARCH CRITERIA** page with the current search specifications listed on the page. From this recreated page, you make changes to the search profile and then select the **FINISH** command button to return to the **ORPS OR SEARCH & REPORTS** page.

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

You may 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 want to save the profile but 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 is retained and a search profile containing the new search specifications is added.

If you do not wish to save the edited search profile, you may 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 OR SEARCH & REPORTS** control panel.



You are not allowed to edit the **Entire DB** search profile.

### Editing Field Selections

You may edit field selections for a previously-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 the values within the search field selection areas that are displayed on the **ORPS OR SEARCH CRITERIA** page.

To specify different or additional search fields, select (or deselect) fields, or modify the statement in the **BOOLEAN LOGIC SPECIFICATION** edit box, then click on the **REFINE** command button. The **ORPS 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 (see **Figure 10**). From here, you may define the values within the specified search fields.



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

**Figure 10** - Example of a dynamically created **ORPS OR SEARCH CRITERIA** page that displays default field values from the current search profile.



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

## Editing Screen Criteria

To edit the screen criteria that is saved with a search profile, click on the **SCREEN** command button at the bottom of the **ORPS OR SEARCH CRITERIA** page. The **ORPS SCREEN OR SEARCH CRITERIA** page is recreated to reflect the currently-selected screen criteria. From here, you may 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.

## Editing the Status Date Range

To edit the status date range that is saved with a search profile, make changes to the **FROM DB AS OF** and **TO DB AS OF** sections as delineated in the *Advanced ORPS Search and Reports Techniques* section of this manual.



TUTORIAL

### Editing a Saved Search Profile

1. From the **ORPS 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 edited search profile, you may click on the **CLEAR** 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 new search profile that contains occurrence reports categorized as Emergency and where the activity classification is Normal Operations.
2. Save the search profile as **Emergency: Normal Ops**.
3. Initiate an edit of the search profile **Emergency: Normal Ops**.
4. Change the profile to contain occurrence reports categorized as Emergency and include all activity classifications *except* Normal Operations.
5. Save this search profile as **Emergency: not Normal Ops**.

## 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 new search profile that contains occurrence reports categorized as Emergency and where the facility function classification is Balance-of-Plant.
2. Save the search profile as **Emergency: Balance-of-Plant**.
3. Initiate an edit of the search profile **Emergency: Balance-of-Plant**.
4. Change the profile to contain occurrence reports categorized as Emergency and include all facility function classifications *except* Balance-of-Plant.
5. Save this search profile as **Emergency: not Balance-of-Plant**.

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## Search Features

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### The Boolean Logic Specification Box

As previously stated, search fields from the **IDENTIFICATION**, **CHRONOLOGY**, and **NARRATIVE** selection boxes automatically have the Boolean operator *AND* applied between the selection boxes. When you click on the **REFINE** command button, the default Boolean logic is displayed below the **BOOLEAN LOGIC SPECIFICATION** edit box (see **Figure 11**). The default logic does not display the field names but rather the unique number assigned to each search field.

The screenshot shows three selection boxes: Identification, Chronology, and Narrative. Each box has a list of search fields with unique numbers. Below these boxes is a text input field for Boolean logic specification, which contains the text "Default logic: 2 and 6 and 14".

| Identification ?             | Chronology ?            | Narrative ?             |
|------------------------------|-------------------------|-------------------------|
| No Selection                 | No Selection            | No Selection            |
| 1. Occurrence Report No.     | 25. Current Report      | 43. All Narrative       |
| 2. Operations / Field Office | 26. Last Modification   | 44. Subject / Title     |
| 3. Area Office               | 27. Discovery           | 45. Originator Title    |
| 4. Contractor                | 28. Categorization      | 46. FM Title            |
| 5. Facility                  | 29. HQ EOC Notification | 47. Plant Area          |
| 6. Report Year               | 30. Other Notifications | 48. Division or Project |

? Boolean logic specification:

**Figure 11** - A section of the **ORPS OR SEARCH CRITERIA** page showing how the default Boolean logic is displayed.

An alternative to selecting search items from the **IDENTIFICATION**, **CHRONOLOGY**, and **NARRATIVE** selection boxes is to enter the search fields (by number) directly into the **BOOLEAN LOGIC SPECIFICATION** edit box using Boolean logic. The Boolean operators may be entered either upper case or lower case, and must be separated from the search field number by a space (see **Figure 12**). When the search profile is refined, search fields entered in the edit box will also be marked in the selection boxes (see **Figure 13**).

The three basic operators, *AND*, *OR*, and *NOT*, may be used in the **BOOLEAN LOGIC SPECIFICATION** edit box. Search terms combined with the Boolean *AND* will return occurrence reports that contain all of the search terms. Search terms combined with the Boolean *OR* will return occurrence reports that contain any of the search terms. Search terms combined with the Boolean *NOT* may be used to exclude occurrence reports from a search. The precedence of operators within an expression is *NOT*, *AND*, and *OR*, but the order of execution may be specified by the use of parentheses.



Any entry in the **BOOLEAN LOGIC SPECIFICATION** edit box will override selections made in the **IDENTIFICATION**, **CHRONOLOGY**, or **NARRATIVE** selection boxes.

| Identification ?   | Chronology ?   | Narrative ?   |
|--|--|---|
| No Selection<br>1. Occurrence Report No.<br>2. Operations / Field Office<br>3. Area Office<br>4. Contractor<br>5. Facility<br>6. Report Year | No Selection<br>25. Current Report<br>26. Last Modification<br>27. Discovery<br>28. Categorization<br>29. HQ EOC Notification<br>30. Other Notifications | No Selection<br>43. All Narrative<br>44. Subject / Title<br>45. Originator Title<br>46. FM Title<br>47. Plant Area<br>48. Division or Project |
| ? Boolean logic specification: (2 AND 6) AND NOT 43  |  |   |

**Figure 12** - A section of the **ORPS OR SEARCH CRITERIA** page showing how user-defined Boolean logic is entered.

| Identification ?   | Chronology ?   | Narrative ?   |
|--|--|---|
| No Selection<br>1. Occurrence Report No.<br>2. Operations / Field Office<br>3. Area Office<br>4. Contractor<br>5. Facility<br>6. Report Year | No Selection<br>25. Current Report<br>26. Last Modification<br>27. Discovery<br>28. Categorization<br>29. HQ EOC Notification<br>30. Other Notifications | No Selection<br>43. All Narrative<br>44. Subject / Title<br>45. Originator Title<br>46. FM Title<br>47. Plant Area<br>48. Division or Project |
| ? Boolean logic specification: (2 AND 6) AND NOT 43  |  |   |

**Figure 13** - A section of the **ORPS OR SEARCH CRITERIA** page showing how Boolean logic is marked in the selection boxes following refinement of a search profile.

The ability to enter the Boolean logic provides you with a very powerful and flexible search tool. For example, by combining search fields in the Boolean logic box with *OR* logic rather than the default *AND* logic, you may search for occurrence reports that identify a specific cause classification for **Direct Cause**, **Contributing Cause**, or **Root Cause**.



## Using the Boolean Logic Specification Edit Box to Search for Reports Where “Training” Is Identified as a Causal Factor

1. From the **ORPS GUI** home page, click on the **Search & Reports** hyperlink.
2. Click on the **NEW** command button in the **ORPS SEARCH CRITERIA** section of the **ORPS OR SEARCH & REPORTS** page.
3. Type **15 or 16 or 17** in the **BOOLEAN LOGIC SPECIFICATION** edit box. Note that the *OR* logic specified in this edit box overrides the default *AND* logic between selection boxes.
4. Click on the **REFINE** command button.
5. Select **5-Training Deficiency** from the **DIRECT CAUSE, CONTRIBUTING CAUSE(S),** and **ROOT CAUSE** selection boxes.
6. Click on the **FINISH** command button.

## Exercise 6

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 1997 occurrence reports where weather or ambient condition is identified as a causal factor.
2. Screen reports to include only those that cite icy, snowy, or freezing conditions.
3. Save the search profile as **Snow/Freezing Conditions 1997**.

## Exercise 7

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 where the Nature of Occurrence classification is both Occupational Injuries/Illnesses and Violation/Inadequate Procedures.
2. Screen reports and include only the incidents where electricity was involved.
3. Save the search profile as **Electrical Injuries/Procedures**.

## The Occurrence Report Number Selection Area

After you select the **OCCURRENCE REPORT NO.** search field from the **IDENTIFICATION** selection box (or type the field number into the **BOOLEAN LOGIC SPECIFICATION** edit box) and click on the **REFINE** command button, the **ORPS OR SEARCH CRITERIA** page is dynamically recreated to display an **OCCURRENCE REPORT NO.** selection area (see **Figure 14**). The **OCCURRENCE REPORT NO.** selection area contains five selection boxes and one edit box that correspond to the elements of an occurrence report number: Operations / Field Office identifier, Area Office identifier, Contractor identifier, Facility identifier, Year of Occurrence, and Sequence Number.

| 1. Occurrence Report No. |                       |                             |                                 |                             |                      |
|--------------------------|-----------------------|-----------------------------|---------------------------------|-----------------------------|----------------------|
| FO -                     | AO -                  | CONT -                      | FAC -                           | YEAR -                      | NUM                  |
| Any<br>ALO<br>CH<br>HQ   | Any<br>AA<br>AB<br>AO | Any<br>ALPH<br>AMES<br>AMPR | Any<br>1000<br>10000<br>1000MDL | Any<br>1999<br>1998<br>1997 | <input type="text"/> |

**Figure 14** - The **OCCURRENCE REPORT NO.** selection area on a dynamically recreated **ORPS 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 all.
- Similarly, if nothing is entered in the sequence number edit box, the default is all.
- Leading zeros are not required in the sequence number edit box.



The **No Selection** entry in “search field” selection boxes (i.e., **IDENTIFICATION**, **CHRONOLOGY**, and **NARRATIVE**) represents a default of no selections; whereas, the **Any** entry in “search item” selection boxes represents a default of all selections.

You may use the **OCCURRENCE REPORT NO.** selection area in a variety of ways. The most obvious way is to select a single occurrence report number; however, the functionality of the **OCCURRENCE REPORT NO.** selection area extends beyond the specification of an individual report. For example, selecting **Operations/Field Office, Area Office, Contractor, Facility, and Report Year** (or any combination of these fields) from the **IDENTIFICATION** selection box is essentially the same as simply selecting **Occurrence Report No.** from the **IDENTIFICATION** selection box.

**Figures 15 and 16** show how values selected from the **OCCURRENCE REPORT NO.** selection area will retrieve the same records as values selected from the **OPERATIONS/FIELD OFFICE, AREA OFFICE, and REPORT YEAR** selection boxes. Notice that the screen display of the **OCCURRENCE REPORT NO.** selection area is more compact and thus easier to use; however, it does not provide the decoded description for the coded fields.

The image shows three separate selection boxes stacked vertically. The first box, titled "2. Operations / Field Office", has a dropdown menu with options: "Any", "ALO - Albuquerque Operations", "CH - Chicago Operations", and "HQ - DOE Headquarters". The second box, titled "3. Area Office", has a dropdown menu with options: "AO - Amarillo Area Office", "BA - Batavia Area Office", "BH - Brookhaven Area Office", and "DA - Dayton Area Office". The third box, titled "6. Report Year", has a dropdown menu with options: "1999", "1998", "1997", and "1996".

**Figure 15** - Values selected from **OPERATIONS/FIELD OFFICE, AREA OFFICE, and REPORT YEAR** selection boxes.

The image shows a single, larger selection box titled "1. Occurrence Report No.". It is divided into six columns: "FO -", "AO -", "CONT -", "FAC -", "YEAR -", and "NUM". Each column has a dropdown menu. The "FO -" menu has options: "Any", "ALO", "CH", "HQ". The "AO -" menu has options: "AO", "BA", "BH", "DA". The "CONT -" menu has options: "Any", "ALPH", "AMES", "AMPR". The "FAC -" menu has options: "Any", "1000", "10000", "1000MDL". The "YEAR -" menu has options: "1999", "1998", "1997", "1996". The "NUM" column is empty.

**Figure 16** - Values selected from the **OCCURRENCE REPORT NO.** selection area.

**NOTE**



It is not necessary to fill in all the items in the **OCCURRENCE REPORT NO.** selection area. Usually **FAC**, **YEAR**, and **NUM** are enough to fully define a particular record. However, including all information (at least **FO**) will improve system performance.

You may also use the **OCCURRENCE REPORT NO.** selection area to identify which facilities (for a specific contractor) submitted occurrence reports for a given year. To do this, you would select a contractor from the **CONT** selection box, a year from the **YEAR** selection box, and type **1** in the **NUM** edit box (see **Figure 17**). To account for canceled reports with a sequence number of 0001, you must also remove the check mark from the **CANCELED** check box in **EXCLUDING** section of the page. Selecting the **SCREEN** command button will display a list of the recovered records so that you may identify the reporting facilities (see **Figure 18**).

| from DB as of ?  |                       | to DB as of ?   |                                 | excluding ?  |                               |
|--|-----------------------|---|---------------------------------|--|-------------------------------|
| <input type="checkbox"/> Use saved criteria  |                       | <input type="checkbox"/> Use saved criteria   |                                 | <input type="checkbox"/> Use saved criteria  |                               |
| <input checked="" type="radio"/> Earliest entry<br><input type="radio"/> Last login<br><input type="radio"/> User specified<br><input type="text" value="mm/dd/yyyy hh:mm"/> |                       | <input checked="" type="radio"/> Now<br><input type="radio"/> Last login<br><input type="radio"/> User specified<br><input type="text" value="02/26/1999 16:59"/> |                                 | <input type="checkbox"/> UCNI<br><input type="checkbox"/> <b>Canceled</b><br><input type="checkbox"/> USEC |                               |
| 1. Occurrence Report No.   |                       |   |                                 |  |                               |
| FO -   | AO -                  | CONT -  | FAC -                           | YEAR -   | NUM                           |
| Any<br>ALO<br>CH<br>HQ   | Any<br>AA<br>AB<br>AO | AMPR<br>ANLE<br>ANLW<br>ARTC  | Any<br>1000<br>10000<br>1000MDL | 1999<br>1998<br>1997<br>1996   | <input type="text" value=""/> |

**Figure 17** - Using the **OCCURRENCE REPORT NO.** selection area to identify reporting facilities.

## ORPS Screen OR Search Criteria

ORPS contains 36621 OR(s) with 38768 occurrences(s) as of 02/26/1999 17:00.  
 Query selected 19 OR(s) with 19 occurrence(s) through 02/26/1999 17:07 using  
 criteria "Untitled".

Check any item(s) your wish to  exclude or  include.

| <b>Subject/Title<br/>Report Number</b>  | <b>Occurrence<br/>Date</b> |
|---|----------------------------|
| <input type="checkbox"/> 1) <a href="#">Personal Clothing Contamination As a Result of a Spill in a Analytical Laboratory Hood</a><br>CH-AA-ANLW-AL-1997-0001 | 02/15/1996                 |
| <input type="checkbox"/> 2) <a href="#">Malfunctioned Shielding Door Outside ANL-W AL Hot Cell No. 6</a><br>CH-AA-ANLW-AL-1997-0002                           | 03/25/1997                 |
| <input type="checkbox"/> 3) <a href="#">Shoe contamination in B wing</a><br>CH-AA-ANLW-AL-1997-0003   | 07/23/1997                 |
| <input type="checkbox"/> 4) <a href="#">NaK Leak From Sodium Cold Trap During Scrap Metal Sizing Operations</a><br>CH-AA-ANLW-ANLW-1997-0001                  | 10/07/1997                 |
| <input type="checkbox"/> 5) <a href="#">Work On The SPF Roof Without Proper Fall Protection</a><br>CH-AA-ANLW-EBR-1997-0001                                   | 01/09/1997                 |
| <input type="checkbox"/> 6) <a href="#">Personnel Clothing Contamination</a><br>CH-AA-ANLW-EBR-1997-0002  | 04/23/1997                 |

**Figure 18** - Using the "Screen" feature to display the reporting facilities.

### Exercise 8

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 using the **OR Number** search field that locates occurrence reports for the following facilities under Lockheed Idaho Technologies Company (LITC): Tan Hot Shop Area (THS), Test Area North (TAN), Test Area North Operations (TANO), and the TAN Landlord Facilities and Oper. (TANLL).
2. Screen the reports to determine which facility reported the fewest occurrences.

### Exercise 9

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. Identify all Los Alamos National Laboratory (LANL) facilities that reported occurrences in 1996.
2. Display the listing of records and identify the facilities.

## Chronology Date Ranges

When you select a search field from the **CHRONOLOGY** selection box, it is refined in a chronology selection area. Depending on the field selected, the chronology selection area displays either date and time selections (e.g., **Current Report**) or only date selections (e.g., **PM Approval**) (see **Figure 19**).

The image shows two sections of a web interface for selecting search criteria. The top section, titled '25. Current Report', has a 'use range' checkbox and three sub-sections: 'Year' (with 'Any', '1999', and '1998' options), 'Month' (with 'Any', '01', and '02' options), and 'Day' (with 'Any', '01', and '02' options). It also includes 'Hour' (with 'Any', '00', and '01' options) and 'Minute' (with 'Any', '00', and '01' options) sections. The bottom section, titled '40. PM Approval', has a 'use range' checkbox and three sub-sections: 'Year' (with 'Any', '1999', and '1998' options), 'Month' (with 'Any', '01', and '02' options), and 'Day' (with 'Any', '01', and '02' options). Both sections include checkboxes for '<', '=', and '>' to define the range of the selection.

**Figure 19** - **CURRENT REPORT** and **PM APPROVAL** selection areas on the **ORPS OR SEARCH CRITERIA** page.

You will use a series of selection boxes and check boxes to set the chronology dates and times. When working with the selection boxes, the following rules apply:

- Within a single selection box, multiple choices use *OR* logic.
- Between selection boxes, *AND* logic is applied.
- If **Any** is selected in a selection box, the default is all.



The **No Selection** entry in “search field” selection boxes (i.e., **IDENTIFICATION**, **CHRONOLOGY**, and **NARRATIVE**) represents a default of no selections; whereas, the **Any** entry in “search item” selection boxes represents a default of all selections.

In addition to specifying date and time values within the selection boxes, you must also check one or more of the <, =, or > check boxes.

Date ranges may be specified by using the internal *OR* logic within a selection box. For example, you may specify a range of months for a specific year (see **Figure 20**).

The screenshot shows a search interface titled "27. Discovery". At the top left, there is a checkbox labeled "use range" which is checked. Below this, there are five columns for date and time selection: Year, Month, Day, Hour, and Minute. Each column has a dropdown menu. The Year dropdown is open, showing "Any", "1999", and "1998" (with "1998" selected). The Month dropdown is open, showing "Any", "01", and "02" (with "02" selected). The Day, Hour, and Minute dropdowns are closed, showing "Any", "00", and "01" respectively. To the left of the dropdowns are three radio buttons: the first is unchecked and labeled "<", the second is checked and labeled "=", and the third is unchecked and labeled ">".

**Figure 20** - Example of **Discovery** date range search using the *OR* logic internal to a selection box.

If the desired range does not lend itself to this selection, you may specify a range by using the **USE RANGE** check box (see **Figure 21**). Mark the **USE RANGE** check box and then click on the **REFINE** command button. Another chronology date/time selection area of the same type will be added to the **ORPS OR SEARCH CRITERIA** page (See **Figures 21** and **22**) and the **USE RANGE** check box no longer appears.

| 27. Discovery                                 |      |       |     |      |        |
|---|------|-------|-----|------|--------|
| <input checked="" type="checkbox"/> use range | Year | Month | Day | Hour | Minute |
| <input type="checkbox"/> <                    | Any  | Any   | Any | Any  | Any    |
| <input type="checkbox"/> =                    | 1999 | 01    | 01  | 00   | 00     |
| <input type="checkbox"/> >                    | 1998 | 02    | 02  | 01   | 01     |

**Figure 21** - Marking the **USE RANGE** check box for a **Discovery** date search.

| 27. Discovery                                 |      |       |     |      |        |
|---|------|-------|-----|------|--------|
| <input checked="" type="checkbox"/> use range | Year | Month | Day | Hour | Minute |
| <input type="checkbox"/> <                    | Any  | Any   | Any | Any  | Any    |
| <input type="checkbox"/> =                    | 1999 | 01    | 01  | 00   | 00     |
| <input type="checkbox"/> >                    | 1998 | 02    | 02  | 01   | 01     |

| 27. Discovery                      |      |       |     |      |        |
|------------------------------------|------|-------|-----|------|--------|
| <input type="checkbox"/> use range | Year | Month | Day | Hour | Minute |
| <input type="checkbox"/> <         | Any  | Any   | Any | Any  | Any    |
| <input type="checkbox"/> =         | 1999 | 01    | 01  | 00   | 00     |
| <input type="checkbox"/> >         | 1998 | 02    | 02  | 01   | 01     |

**Figure 22** - Refining the search profile with the **USE RANGE** check box checked recreates the page and displays an additional **DISCOVERY** selection area.

You may now specify the desired range by utilizing both chronology date/time selection areas. **Figure 23** shows a search for a Discovery Date range *greater than or equal to* 10/01/1995 and *less than or equal to* 05/17/1996.

| 27. Discovery                         |      |       |     |      |        |
|---------------------------------------|------|-------|-----|------|--------|
|                                       | Year | Month | Day | Hour | Minute |
| <input type="checkbox"/> <            |      |       |     |      |        |
| <input checked="" type="checkbox"/> = | 1996 | 09    | Any | Any  | Any    |
| <input checked="" type="checkbox"/> > | 1995 | 10    | 01  | 00   | 00     |
|                                       | 1994 | 11    | 02  | 01   | 01     |

| 27. Discovery                         |      |       |     |      |        |
|---------------------------------------|------|-------|-----|------|--------|
|                                       | Year | Month | Day | Hour | Minute |
| <input checked="" type="checkbox"/> < |      |       |     |      |        |
| <input checked="" type="checkbox"/> = | 1997 | 04    | 16  | Any  | Any    |
| <input checked="" type="checkbox"/> > | 1996 | 05    | 17  | 00   | 00     |
|                                       | 1995 | 06    | 18  | 01   | 01     |

**Figure 23** - Example **Discovery** date range search using two **DISCOVERY** selection areas.

**NOTE**



If you are using the **BOOLEAN LOGIC SPECIFICATION** edit box to specify a chronology field, the **USE RANGE** check box will not appear in the chronology selection area after you select the **REFINE** command button. To use the range function directly from the **BOOLEAN LOGIC SPECIFICATION** edit box, you must specify the field number twice separated by a Boolean **AND** operator (see **Figure 24**).

| Identification ?             | Chronology ?            | Narrative ?             |
|------------------------------|-------------------------|-------------------------|
| No Selection                 | No Selection            | No Selection            |
| 1. Occurrence Report No.     | 25. Current Report      | 43. All Narrative       |
| 2. Operations / Field Office | 26. Last Modification   | 44. Subject / Title     |
| 3. Area Office               | 27. Discovery           | 45. Originator Title    |
| 4. Contractor                | 28. Categorization      | 46. FM Title            |
| 5. Facility                  | 29. HQ EOC Notification | 47. Plant Area          |
| 6. Report Year               | 30. Other Notifications | 48. Division or Project |

? Boolean logic specification: 27 AND 27

**Figure 24** - Using the **BOOLEAN LOGIC SPECIFICATION** edit box to duplicate the **USE RANGE** feature.



## Creating a Search Profile That Contains a Chronology Date Range Using the DATE RANGE Feature of the ORPS GUI

1. From the **ORPS GUI** home page, click on the **Search & Reports** hyperlink.
2. Click on the **NEW** command button in the **ORPS SEARCH CRITERIA** section of the **ORPS OR SEARCH & REPORTS** page.
3. Select a field from the **CHRONOLOGY** selection box.
4. Click on the **REFINE** command button.
5. Check the **USE RANGE** check box.
6. Click on the **REFINE** command button.
7. Select the values that will *bound* the range from the selection boxes in both chronology selection areas.
8. Check the relevant **>**, **<**, or **=** check boxes.
9. Click on the **FINISH** command button.

### Exercise 10

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 with Notification dates between December 15, 1996 and December 22, 1996.

### **Exercise 11**

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 all Update, Update/Final, and Final Reports with Discovery Dates in the first quarter of 1997.

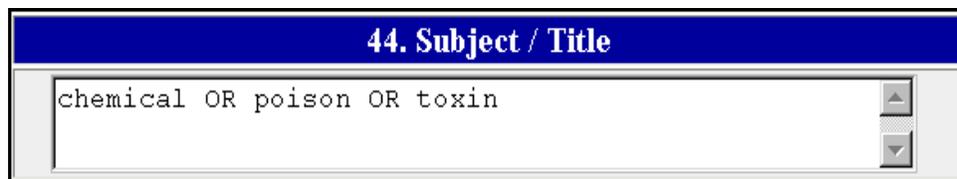
### **Exercise 12**

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 that were rejected during the last quarter of 1995 or the first quarter of 1996.

## Narrative Searches

You make refinements to fields selected from the **NARRATIVE** selection box on the **ORPS OR SEARCH CRITERIA** page by typing a search expression in an edit box (see **Figure 25**). A simple or complex search string may be entered in the edit box without regard to the size of the box. The entry will automatically wrap to a new line and scroll beyond the bottom margin of the edit box, allowing longer search strings.



**Figure 25** - The **SUBJECT/TITLE** edit box on the **ORPS OR SEARCH CRITERIA** page.



Some browsers will allow you to start your narrative input on any line in the edit box; however, if the narrative is started on any line other than the first line, the query will return zero records. Additionally, with some browsers, each time the query is refined, a blank line is again inserted at the top of the edit box, ahead of the text. This blank line must be removed before the query is again processed, either by refining or finishing, or the query will retrieve zero records.



The ORPS GUI uses the TOPIC® search engine for narrative searches. Users should be aware that a narrative search string processed by TOPIC® will produce results much different from the same string entered on HP ORPS. Many of these differences are identified in the following discussion and must be kept in mind as search strings are constructed.

You may easily compose basic narrative searches using a few basic operators and following a few general guidelines. (Note that information for advanced narrative searches is found in the *Advanced ORPS Search and Reports Techniques* section of this manual.) The guidelines for performing basic searches are:

- Search strings are not case sensitive. Queries may be entered in upper, lower, or mixed case. This applies to both search words and operators.

- A simple word search (i.e., where search word(s) not enclosed in quotes) will locate stemmed variations of the search words. For example, a search for the word **protection** will locate records containing the words “protection,” “protect,” “protective,” “protected,” etc. In order to search for a particular word only, the search word must be enclosed in quotation marks. For example, use the search term “**protection**” to search for records containing *only* the word “protection.”



An ORPS GUI stemmed search is not equivalent to the wildcard narrative search on HP ORPS. A wildcard search on HP ORPS locates words with different endings for the specified base, whereas a stemmed search on the ORPS GUI locates all instances of words having the same stem. Also, note that, for the ORPS GUI to search for stemmed variations of a word, the stem itself must be a word in the TOPIC® dictionary.

- Two or more words separated by a space are searched for as a phrase, e.g., **fall protection**. This search string will locate all records containing the phrase “fall protection,” and records containing stemmed variations of the phrase such as “fallen protective barrier.” Again, to search for the exact string, enclose the search string in quotation marks, e.g., “**fall protection**.”
- The basic Boolean operators (*OR*, *AND*, and *NOT*) may be entered in a search string without any special formatting. These are reserved words in TOPIC and, by default, will be considered operators when included in a search string. If they are used as a search word rather than an operator, they must be enclosed in quotation marks. For example, the search string **slipped and fell** will search for records containing both the words “slipped” and “fell.” To search for the phrase “**slipped and fell**,” the *AND* must be enclosed in quotation marks, e.g., **slipped “and” fell** or **slipped and fell**.
- Where multiple Boolean operators are included in a search string, *AND* takes precedence over *OR*. Parentheses may be used to further define the order of evaluation of an expression.



On HP ORPS, *OR* takes precedence over *AND*. This differs from the order of precedence on the ORPS GUI.

- The asterisk operator locates occurrence reports that contain matches to a search string containing variables. The asterisk operator specifies zero or more of any alphanumeric character. For example, **sa\*** will locate reports that contain any one of the following: “safety,” “saline,” “sat,” “satisfy,” “salient,” etc.

NOTE



The asterisk (\*) wildcard operator on the ORPS GUI is equivalent to the HP ORPS wildcard operator @.

Step-by-Step

TUTORIAL

### Performing a Simple Narrative Search

1. From the **ORPS OR SEARCH CRITERIA** page, select a search field from the **NARRATIVE** selection box.
2. Click on the **REFINE** command button.
3. Type a word or phrase in the narrative field edit box.
4. Click on the **FINISH** command button.

## Exercise 13

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. Start a new search profile that contains occurrence reports with the word “evacuat” with any possible ending in the subject or title for the Rocky Flats Operations Field Office.
2. Screen the profile and verify the report selection. What varieties of the word “evacuate” were recovered?
3. Revise the profile to contain occurrence reports with the word “evacuat” with any possible ending in the subject or title for the Pu Fabrication facilities.



You may revise the profile from the **ORPS SCREEN OR SEARCH CRITERIA** page or from **ORPS OR SEARCH CRITERIA** page. The only way to return to the **ORPS OR SEARCH CRITERIA** page from the **ORPS SCREEN OR SEARCH CRITERIA** page is to select the **BACK** button from the browser button bar menu.

4. Screen the profile and verify the report selection.

## Exercise 14

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. Start a new search profile that contains occurrence reports with the exact phrase “fall protection” in the subject or title.
2. Screen the profile and verify the report selection.
3. Revise the profile to contain occurrence reports with the exact phrase “fall protection” in the subject or title and stemmed variations of “procedure” in the cause narrative.



### HINT

The only way to return to the **ORPS OR SEARCH CRITERIA** page from the **ORPS SCREEN OR SEARCH CRITERIA** page is to select the **BACK** button from the browser button bar menu.

4. Screen the profile and verify the report selection.



## Appendix - ORPS GUI Search Field Definitions

### Identification Search Fields

| Field Number | Field Name              | Field Description  |
|--------------|-------------------------|--|
| 1            | Occurrence Report No.   | The Occurrence Report Number is an alphanumeric designation that identifies the DOE Operations / Field Office, Area Office (if applicable), DOE contractor or laboratory involved, facility, the calendar year of the occurrence report, and sequential number of the occurrence by facility. Examples are SR--WSRC-MED-1995-0005 and AL-AO-MHSM-PANTEX-1995-0003. This number is automatically generated when a Notification Report is transmitted. |
| 2            | Operations/Field Office | Every occurrence report must have a DOE Operations / Field Office associated with it.  |
| 3            | Area Office             | An occurrence report may or may not 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.  |

| Field Number | Field Name              | Field Description  |
|--------------|-------------------------|--|
| 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.) |
| 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 (Program Office) associated with it.  |
| 10           | Lab/Site/Org            | An occurrence report should have a site (or laboratory/organization) associated with it.   |
| 11           | Facility Function       | Facility Function describes the type of facility or activity/function being performed by the facility at the time of occurrence. This field is required for all occurrence reports.  |
| 12           | Activity Category       | The activity category describes the ongoing activity at the time of the occurrence. This field is required for all occurrence reports.   |
| 13           | Occurrence Category     | Each occurrence is categorized as Emergency (E), Unusual (U), or Off-Normal (O) depending on the seriousness of the occurrence. This field is required for all occurrence reports. In addition, a report may be Canceled. Canceled Reports do not require any information beyond that required in a Notification Report.                           |
| 14           | Nature(s) of Occurrence | Occurrences are categorized into Nature of Occurrence groupings. The groupings are generic and relate to DOE operations. This field is required for all occurrence reports. Each report must have from one to three entries.   |

| Field Number | Field Name            | Field Description   |
|--------------|-----------------------|---|
| 15           | Direct Cause          | <p>The Direct Cause is the cause that directly resulted in the occurrence. Every Final Report must have a direct cause identified. Notification Reports and Update Reports may or may not have a direct cause identified. However, if a direct cause is identified, it is subject to change prior to submittal of the Final Report.</p>   |
| 16           | Contributing Cause(s) | <p>Contributing Causes are causes that contributed to the occurrence but, that by themselves, would not have caused the occurrence. Every Final Report "may" have one to three contributing causes identified. Notification Reports and Update Reports "may" also have one to three contributing causes identified. However, they are subject to change prior to approval of the Final Report.</p>  |
| 17           | Root Cause            | <p>The Root Cause is the cause that, if corrected, would prevent recurrence of this and similar occurrences. The root cause does not apply to this occurrence only, but has generic implications to a broad group of possible occurrences, and it is the most fundamental aspect of the cause that may logically be identified and corrected. In the event a series of causes can be identified, one leading to another, this series should be pursued until the most fundamental, correctable cause has been identified.</p> <p>Every Final Report and Roll-up Report must have a root cause identified. Notification Reports and Update Reports may or may not have a root cause identified. However, if a root cause <i>is</i> identified, it is subject to change prior to submittal of the Final Report.</p> |

| Field Number | Field Name            | Field Description   |
|--------------|-----------------------|---|
| 18           | Number of Occurrences | This is the number of occurrences in an occurrence report. The number will always be one unless the occurrences meet the specific criteria for Roll-Up Reports for Off-Normal Occurrences. If the occurrences meet these criteria, the field should be revised each time additional occurrences are added.  |
| 19           | FM Telephone          | This is the phone number of the Facility Manager (the individual who has direct line responsibility for operation of the facility). Facility Manager information is required for all Notification, Update, and Final Reports.   |
| 20           | Originator Telephone  | This is the phone number of the individual who gathered the information and originated and transmitted the report. Originator information is required for all Notification, Update, and Final Reports.  |
| 21           | Further Evaluation    | This field indicates if further evaluation of the occurrence is required. (This response should not be "yes" on a Final Report, as further evaluation could change the root cause or identify additional corrective actions.) If further evaluation is required, then the report must indicate if further evaluation is required before further operation. This field is required for all occurrence reports. |
| 22           | Before Operation      | This field identifies if further evaluation of the occurrence is required before further operation. This field is required for all Notification and Update/Final Reports where Further Evaluation is "Yes".   |

| Field Number | Field Name        | Field Description  |
|--------------|-------------------|--|
| 23           | CA Revision Count | This field identifies the number of times that a corrective action target date has been revised. All corrective actions will have a revision count of zero until the target date is revised. The count increments by one each time the target date is revised. An entry for this field will exist for all occurrence reports for which corrective actions exist. The count is maintained at a corrective action level, i.e., different corrective actions may have different revision counts for the same occurrence report. |
| 24           | Rejection Count   | This field identifies the number of times that an occurrence report has been rejected. The count starts at 1 for the first report rejection and increments by one for each subsequent rejection.   |

## Chronology Search Fields

| Search Number | Field Name                      | Field Description  |
|---------------|---------------------------------|--|
| 25            | Current Report Date/Time        | This is the date and time that the latest version of the occurrence report was made available to the ORPS User. For an occurrence that is currently a Notification or Update Report on the system, this is the date that the Notification or Update Report was last transmitted. In the case of a Final Report, it is the date that the Program Manager signed the report. |
| 26            | Last Modification Date          | This is the date of the last modification to the occurrence report.  |
| 27            | Discovery Date/Time             | This is the date and time when the facility staff discovered the event or condition being reported. This field is required for all occurrence reports.   |
| 28            | Categorization Date/Time        | This is the date and time the Facility Manager determined the event or condition constituted a reportable occurrence and determined its category (Emergency, Unusual, or Off-normal). This field is required for all Notification, Update, and Final Reports.  |
| 29            | HQ EOC Notification Date/Time   | This is the date and time when the DOE HQ Emergency Operations Center (EOC) was notified of the occurrence. This field is required for all occurrence reports that are categorized as Emergency or Unusual.  |
| 30            | Other Notification(s) Date/Time | This is the date and time when state and local officials or other agencies were notified of the occurrence. This field is optional for all occurrence reports.   |
| 31            | AC Review Date                  | This is the date when an Authorized Classifier determined that the occurrence report was unclassified. This field is required for all occurrence reports that are prepared by facilities where classified operations are conducted and classified information is generated.  |

| <b>Search Number</b> | <b>Field Name</b>               | <b>Field Description</b>   |
|----------------------|---------------------------------|--|
| 32                   | Notification Report Date/Time   | This is the date and time the Notification Report was transmitted to the centralized computer.   |
| 33                   | Initial Update Report Date/Time | This is the date and time the Initial Update Report was transmitted to the centralized computer.   |
| 34                   | Latest Update Report Date/Time  | This is the date and time the most recent Update Report was transmitted to the centralized computer. (If only one Update Report has been transmitted, it is the same as the Initial Update Report Date/Time.)  |
| 35                   | Final Report Date/Time          | This is the date and time of signature by the DOE Program Manager on the Final Report. The report then becomes an approved Final Report.   |
| 36                   | Rejected Date                   | This is the date when an occurrence report was rejected. Multiple rejection dates may exist for a single occurrence report. The search will locate a report if any rejection date meets the selection criteria. This field is found for occurrence reports that have been rejected.        |
| 37                   | Further Evaluation Date         | This is the date when further evaluation of an occurrence is to be completed to determine if further operation of the facility is to be allowed. This field is required for all occurrence reports where further evaluation is required and where evaluation is required before operation. |
| 38                   | FM Approval Date                | This is the date of transmission by the Facility Manager of a Final Report. ONLY approved Final Reports meet this criterion.   |
| 39                   | FR Approval Date                | This is the date of signature by the DOE Facility Representative on the Final Report. ONLY approved Final Reports meet this criterion.   |
| 40                   | PM Approval Date                | This is the date of signature by the DOE Program Manager on the Final Report. The report then becomes an approved Final Report.  |

| Search Number | Field Name                | Field Description   |
|---------------|---------------------------|---|
| 41            | CA Target Completion Date | This is the latest date, either original or revised, when a corrective action is, or was, scheduled to be completed. This field will exist for all occurrence reports where corrective actions exist. |
| 42            | CA Actual Completion Date | This is the date when a corrective action was actually completed. This field will exist for all occurrence reports where corrective actions have been completed.                                      |

## Narrative Search Fields

| Search Number | Field Name       | Field Description   |
|---------------|------------------|---|
| 43            | All Narrative    | This selection allows the user to search all narrative fields.  |
| 44            | Subject/Title    | The Subject/Title is a brief description (140 characters or less) of the nature, cause, and result of the occurrence. If the occurrence involved an Unreviewed Safety Question, the acronym "USQ" is placed at the end of the title/subject. If the report is a roll-up report, the word "roll-up" is included in the title/subject. This field is required for all occurrence reports.   |
| 45            | Originator Title | The Originator is the individual who gathered the information and originated and transmitted the report. This person is generally the most knowledgeable about the event. If a signed, hard-copy report is not on file, the report must be transmitted by the Facility Manager or designee. Originator information is automatically entered on the report when the report is transmitted. Originator information includes the name, title, and telephone number of the originator; however, only the title and telephone number are searchable in ORPS. Originator information is required for all Notification, Update, and Final Reports. |
| 46            | FM Title         | The Facility Manager, or designee, is the individual who has direct line responsibility for operation of the facility. It is also the individual who approved the occurrence report, either by personally transmitting the electronic report or by signing the hard copy report. Facility Manager information includes the name, title, and telephone number of the Facility Manager; however, only the title and telephone number are searchable in ORPS. Facility Manager information is required for all Notification, Update, and Final Reports.  |

| Search Number | Field Name             | Field Description   |
|---------------|------------------------|---|
| 47            | Plant Area             | This field identifies the name of the site-specific plant area where the occurrence took place. This field is required for all Notification, Update, and Final Reports.   |
| 48            | Division or Project    | This field identifies the division, project, or contractor organization responsible for the facility at which the occurrence took place. This field is required for all Notification, Update, and Final Reports.  |
| 49            | System/Bldg/Equip      | This field identifies the systems, equipment, or structural items involved in the occurrence, as applicable. In addition, in the case of component failures or defective parts or materials, information such as the manufacturer, model number, and size is provided. The most significant items are listed here. Additional information may be found in the Occurrence Description. This field is required for all Notification, Update, and Final Reports. |
| 50            | Operating Condition(s) | The Operating Conditions field describes the operational status of the facility or equipment at the time of the occurrence; including pertinent temperatures, pressures, or other parameters necessary for evaluation of the occurrence and its consequences. If the information is not applicable, the field should contain the words, "Does not apply." This field is required for all Notification, Update, and Final Reports.                             |
| 51            | Occurrence Description | The Occurrence Description field contains a description of what happened and what was observed. This description should include a sequence of events. This field is required for all Notification, Update, and Final Reports.   |

| Search Number | Field Name            | Field Description  |
|---------------|-----------------------|--|
| 52            | Immediate Action(s)   | The Immediate Actions field describes the immediate or remedial actions taken to return the facility, system, or equipment item to service; to correct or alleviate the anomalous condition; and to record the results of those actions. This field is required for all Notification, Update, and Final Reports.                 |
| 53            | Cause Description     | The Cause Description field discusses the cause of the occurrence and includes root, direct and contributing causes, if applicable, and the corrective actions identified. This field is required for all Final Reports.   |
| 54            | FM Evaluation         | This field provides the Facility Manager evaluation of the occurrence and its effect or possible effect on the plant, system, program, etc. This field is required on a Notification Report if further evaluation is required before further operation. It is also required for all Update and Final Reports.                    |
| 55            | Corrective Action(s)  | This field lists all actions identified to correct the problem that, when completed, will prevent recurrence. The first two lines of each corrective action shall be a title or summary of the corrective action. This field is required for all Final Reports.  |
| 56            | CA Date Justification | The CA Date Justification provides the Facility Manager's reason for revising a corrective action target completion date.  |
| 57            | ES&H Impact           | The Impact on ES&H field provides an assessment of the environment, safety, and health consequences and implications of the occurrence and description of the impact of the occurrence on the environment, safety, and health of workers, the public, and onsite/offsite environs. This field is required for all Final Reports. |

| Search Number | Field Name            | Field Description  |
|---------------|-----------------------|--|
| 58            | Programmatic Impact   | This field describes the impact of the occurrence on the program or project affected. This could be a loss of data, loss of plant availability for a specified period, additional costs, schedule delays, or other measurable consequences of the occurrence. This field is required for all Final Reports.                      |
| 59            | Codes/Std's Impact    | The Codes and Standards Impact field contains a statement regarding the adequacy of the codes or standards (if the occurrence affected the requirements of national codes and standards, program standards or DOE Orders), along with any recommended changes. This field is required for all Final Reports.                     |
| 60            | Lesson(s) Learned     | This field includes any lessons learned from the occurrence that could be of importance to other facility operators or that should be addressed in personnel training or facility procedures. This field is required for all Final Reports.  |
| 61            | Similar Occurrence(s) | This field provides a list of report numbers for occurrence reports that describe similar occurrences. The purpose of this item is to identify, if recognized, occurrences that might suggest a generic problem (i.e., cause) that may result in single or common lessons learned. This field is required for all Final Reports. |
| 62            | User Field #1         | This optional field is used by the Facility Manager to store facility-specific information (e.g., a cross reference to performance indicator data).  |
| 63            | User Field #2         | This optional field is used by the Facility Manager to store facility-specific information (e.g., a cross reference to a site specific number or name).  |

| Search Number | Field Name | Field Description  |
|---------------|------------|--|
| 64            | FR Input   | This field provides the Facility Representative evaluation of the occurrence, including an evaluation of the initial and proposed corrective actions and any follow-up by the contractor, and should describe any other actions that DOE has taken since the occurrence. This field is required only on Final Reports rejected by the Facility Representative. |
| 65            | PM Input   | This field provides the Program Manager evaluation of the occurrence, including an evaluation of the initial and proposed corrective actions and any follow-up, and should describe any other actions that DOE has taken since the occurrence. This field is required only on Final Reports rejected by the Program Manager.                                   |



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## Exercise Solutions

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### Exercise 1

1. Create a new search profile that contains occurrence reports that have been rejected five or more times for the Idaho Operations.
  - a. From the **ORPS GUI** home page, click on the **Search & Reports** hyperlink.
  - b. Click on the **NEW** command button in the **OR SEARCH CRITERIA** section of the **ORPS OR SEARCH & REPORTS** page.
  - c. Select **2. Operations/Field Office** from the **IDENTIFICATION** selection box. Scroll down the box to **24. Rejection Count** and add this item to the selection by doing a **[CTRL]+[CLICK]**.
  - d. Click on the **REFINE** command button.
  - e. Select **ID-Idaho Operations** from the **OPERATIONS/FIELD OFFICE** selection box.
  - f. Check the **=** and **>** **REJECTION COUNT** check boxes and type **5** into the **REJECTION COUNT** edit box.
  - g. Click on the **FINISH** command button.
2. Save the search profile as **Idaho Rejected**.
  - a. Type **Idaho Rejected** in the **SAVE AS** edit box. (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 **Idaho Rejected**.
  - a. Select **Idaho Rejected** from the **OR SEARCH CRITERIA** selection box.
  - b. Click on the **DELETE** command button.

## Exercise 2

1. Create a new search profile that contains occurrence reports for the Nevada Test Site facility (NTS) categorized into the Nature(s) of Occurrence groupings 03 or 04.
  - a. From the **ORPS GUI** home page, click on the **Search & Reports** hyperlink.
  - b. Click on the **NEW** command button in the **OR SEARCH CRITERIA** section of the **ORPS OR SEARCH & REPORTS** page.
  - c. Select **5. Facility** from the **IDENTIFICATION** selection box. Scroll down the box to **14. Nature(s) of Occurrence** and add this item to the selection by doing a **[CTRL]+[CLICK]**.
  - d. Click on the **REFINE** command button.
  - e. Click in the **FACILITY** selection box and type **N**. Scroll down the box and select **NTS-Nevada Test Site**.
  - f. Scroll down the **NATURE OF OCCURRENCE** selection box and select **03-PERSONNEL SAFETY**. Scroll down the box to **04-PERSONNEL RADIATION PROTECTION** and add this item to the selection by doing a **[CTRL]+[CLICK]**.
  - g. Click on the **FINISH** command button.
2. Save the search profile as **NTS Personnel Safety & Rad**.
  - a. Type **NTS Personnel Safety & Rad** in the **SAVE AS** edit box. (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 **NTS Personnel Safety & Rad**.
  - a. Select **NTS Personnel Safety & Rad** from the **OR SEARCH CRITERIA** selection box.
  - b. Click on the **DELETE** command button.

### Exercise 3

1. Create a new search profile that contains 1997 occurrence reports for the Los Alamos National Laboratory that required further evaluation of the occurrence before further operation. View the selected occurrences before saving the search profile.
  - a. From the **ORPS GUI** home page, click on the **Search & Reports** hyperlink.
  - b. Click on the **NEW** command button in the **OR SEARCH CRITERIA** section of the **ORPS OR SEARCH & REPORTS** page.
  - c. Select **4. Contractor** from the **IDENTIFICATION** selection box, then add **6. Report Year** to the selection by doing a **[CTRL]+[CLICK]**. Scroll down the box to **22. Before Operation** and add this item to the selection by doing a **[CTRL]+[CLICK]**.
  - d. Click on the **REFINE** command button.
  - e. Click in the **CONTRACTOR** selection box and type **L**.
  - f. Select **1997** from the **REPORT YEAR** selection box. (No action is required on the **BEFORE OPERATION** selections because the **YES** radio button is the default selection.)
  - g. Click on the **SCREEN** command button and click on the hyperlinked Report Titles to view selected reports.
  - h. After viewing selected reports, return to the **ORPS OR SEARCH & REPORTS** page by clicking on **FINISH** command button at the bottom of the **ORPS SCREEN OR SEARCH CRITERIA** page.
2. Save the search profile as **LANL 1997 Before Operation**.
  - a. Type **LANL 1997 Before Operation** in the **SAVE AS** edit box. (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 **LANL 1997 Before Operation**.
  - a. Select **LANL 1997 Before Operation** from the **OR SEARCH CRITERIA** selection box.
  - b. Click on the **DELETE** command button.

## Exercise 4

1. Create a new search profile that contains occurrence reports categorized as Emergency and where the activity classification is Normal Operations.
  - a. From the **ORPS GUI** home page, click on the **Search & Reports** hyperlink.
  - b. Click on the **NEW** command button in the **OR SEARCH CRITERIA** section of the **ORPS OR SEARCH & REPORTS** page.
  - c. Select **12. Activity Category** and **13. Occurrence Category** by holding down the left mouse button and moving the mouse across both entries in the **IDENTIFICATION** selection box.
  - d. Click on the **REFINE** command button.
  - e. Select **03-Normal Operation** from the **ACTIVITY CATEGORY** selection box.
  - f. Select **E-Emergency** from the **OCCURRENCE CATEGORY** selection box.
  - g. Click on the **FINISH** command button.
2. Save the search profile as **Emergency: Normal Ops**.
  - a. Type **Emergency: Normal Ops** in the **SAVE AS** edit box. (Make sure that **Untitled** is selected in the **OR SEARCH CRITERIA** selection box.)
  - b. Click on the **SAVE** command button.
3. Initiate an edit of the search profile **Emergency: Normal Ops**.
  - a. Select **Emergency: Normal Ops** from the **OR SEARCH CRITERIA** selection box on the **ORPS OR SEARCH & REPORTS** page.
  - b. Click on the **EDIT** command button.
4. Change the profile to contain occurrence reports categorized as Emergency and include all activity classifications *except* Normal Operations.
  - a. Select **01-Construction** and **02-Maintenance** by holding down the left mouse button and moving the mouse across both entries in the **ACTIVITY CATEGORY** selection box. Do a **[CTRL]+[CLICK]** on **04-Startup**. With the **[CTRL]** key held down, click and drag the mouse across the remaining entries in the **ACTIVITY CATEGORY** selection box. (At this point, all entries should be selected except **Any** and **03-Normal Operations**.)
  - b. Click on the **FINISH** command button.
5. Save this search profile as **Emergency: not Normal Ops**.
  - a. Type **Emergency: not Normal Ops** in the **SAVE AS** edit box.
  - b. Click on the **SAVE** command button.

## Exercise 5

1. Create a new search profile that contains occurrence reports categorized as Emergency and where the facility function classification is Balance-of-Plant.
  - a. From the **ORPS GUI** home page, click on the **Search & Reports** hyperlink.
  - b. Click on the **NEW** command button in the **OR SEARCH CRITERIA** section of the **ORPS OR SEARCH & REPORTS** page.
  - c. Select **11. Facility Function** from the **IDENTIFICATION** selection box, then add **13. Occurrence Category** by doing a **[CTRL]+[CLICK]**.
  - d. Click on the **REFINE** command button.
  - e. Selection **99-Balance-of-Plant** from the **FACILITY FUNCTION** selection box.
  - f. Select **E-Emergency** from the **OCCURRENCE CATEGORY** selection box.
  - g. Click on the **FINISH** command button.
2. Save the search profile as **Emergency: Balance-of-Plant**.
  - a. Type **Emergency: Balance-of-Plant** in the **SAVE AS** edit box. (Make sure that **Untitled** is selected in the **OR SEARCH CRITERIA** selection box.)
  - b. Click on the **SAVE** command button.
3. Initiate an edit of the search profile **Emergency: Balance-of-Plant**.
  - a. Select **Emergency: Balance-of-Plant** from the **OR SEARCH CRITERIA** selection box on the **ORPS OR SEARCH & REPORTS** page.
  - b. Click on the **EDIT** command button.
4. Change the profile to contain occurrence reports categorized as Emergency and include all facility function classifications *except* Balance-of-Plant.
  - a. Select facility functions 01 through 16 by holding down the left mouse button and moving the mouse across the sixteen entries in the **FACILITY FUNCTION** edit box. (Make sure you do not select **Any** or **99-Balance-of-Plant**.)
  - b. Click on the **FINISH** command button.
5. Save this search profile as **Emergency: not Balance-of-Plant**.
  - a. Type **Emergency: not Balance-of-Plant** in the **SAVE AS** edit box.
  - b. Click on the **SAVE** command button.

## Exercise 6

1. Create a new search profile that contains 1997 occurrence reports where weather or ambient condition is identified as a causal factor.
  - a. From the **ORPS GUI** home page, click on the **Search & Reports** hyperlink.
  - b. Click on the **NEW** command button in the **OR SEARCH CRITERIA** section of the **ORPS OR SEARCH & REPORTS** page.
  - c. Type **6 and (15 or 16 or 17)** in the **BOOLEAN LOGIC SPECIFICATION** edit box.
  - d. Click on the **REFINE** command button.
  - e. Select **1997** from the **REPORT YEAR** selection box.
  - f. Select **7A - Weather or Ambient Condition** from the **DIRECT CAUSE**, **CONTRIBUTING CAUSE**, and **ROOT CAUSE** selection boxes.
  
2. Screen reports to include only those that cite icy, snowy, or freezing conditions.
  - a. Click on the **SCREEN** command button.
  - b. Click on the **INCLUDE** radio button.
  - c. View the reports to determine the conditions. Mark the check boxes associated with the following reports: (Note that additional reports may have been added to the database after the creation of this exercise.)  
**RL--PHMC-PNL&L-1997-0001**  
**RL--PHMC-TANKFARM-1997-0003**  
**RFO--KHLL-7790PS-1997-0009**  
**ORO--LMES-Y12SITE-1997-0002**  
**ALO-LA-LANL-HEMACHPRES-1997-0001**  
**RFO--KHLL-NONPUOPS2-1997-0001**
  - d. Click on the **FINISH** command button.
  
3. Save the search profile as **Snow/Freezing Conditions 1997**.
  - a. Type **Snow/Freezing Conditions 1997** in the **SAVE AS** edit box. (Make sure that **Untitled** is selected in the **OR SEARCH CRITERIA** selection box.)
  - b. Click on the **SAVE** command button.

## Exercise 7

1. Create a new search profile that contains occurrence reports where the Nature of Occurrence classification is both Occupational Injuries/Illnesses and Violation/Inadequate Procedures.
  - a. From the **ORPS GUI** home page, click on the **Search & Reports** hyperlink.
  - b. Click on the **NEW** command button in the **OR SEARCH CRITERIA** section of the **ORPS OR SEARCH & REPORTS** page.
  - c. Type **14 AND 14** in the **BOOLEAN LOGIC SPECIFICATION** edit box.
  - d. Click on the **REFINE** command button.
  - e. Select **01F - Violation/Inadequate Procedures** from the first **NATURE(S) OF OCCURRENCE** selection box.
  - f. Select **03A - Occupational Illness/Injuries** from the second **NATURE(S) OF OCCURRENCE** selection box.
  
2. Screen reports and include only the incidents where electricity was involved.
  - a. Click on the **SCREEN** command button.
  - b. Click on the **INCLUDE** radio button.
  - c. View reports to identify if electricity was involved. Mark the check boxes associated with the following reports:  
**ALO-LA-LANL-DPWEST-1995-0002**  
**ALO-LA-LANL-HEMACHPRES-1996-0009**  
**ALO-LA-LANL-LANL-1995-0015**  
**ALO-LA-LANL-LANL-1997-0001**  
**ALO-LA-LANL-PHYSTECH-1994-0013**  
**ORO--LMES-Y12CM-1996-0002**  
**SAN--LLNL-LLNL-1992-0055**  
(Note that additional reports may have been added to the database after the creation of this exercise)
  - d. Click on the **FINISH** command button.
  
3. Save the search profile as **Electrical Injuries/Procedures**.
  - a. Type **Electrical Injuries/Procedures** in the **SAVE AS** edit box. (Make sure that **Untitled** is selected in the **OR SEARCH CRITERIA** selection box.)
  - b. Click on the **SAVE** command button.

## Exercise 8

1. Create a new search profile using the OR Number search field that locates occurrence reports for the following facilities under Lockheed Idaho Technologies Company (LITC): Tan Hot Shop Area (THS), Test Area North (TAN), Test Area North Operations (TANO), and the TAN Landlord Facilities and Oper. (TANLL).
  - a. From the **ORPS GUI** home page, click on the **Search & Reports** hyperlink.
  - b. Click on the **NEW** command button in the **OR SEARCH CRITERIA** section of the **ORPS OR SEARCH & REPORTS** page.
  - c. Select **1. Occurrence Report No.** from the **IDENTIFICATION** selection box.
  - d. Click on the **REFINE** command button.
  - e. Select **ID** from the **FO** selection box.



**HINT** It is not necessary to select **ID** from the **FO** selection box. However, including the Field Office information will improve system performance.

- f. Select **LITC** from the **CONT** selection box.
  - g. Select **TAN** from the **FAC** selection box. Scroll down the box to **TANLL**, **TANO**, and **THS** and add these items to the selection by doing a **[CTRL]+[CLICK]**.
2. Screen the reports to determine which facility reported the fewest occurrences.
  - a. Click on the **SCREEN** command button. (Note that no occurrences are displayed for the TAN Hot Shop Area, although additional reports may have been added to the database after the creation of this exercise.)

## Exercise 9

1. Identify all Los Alamos National Laboratory (LANL) facilities that reported occurrences in 1996.
  - a. From the **ORPS GUI** home page, click on the **Search & Reports** hyperlink.
  - b. Click on the **NEW** command button in the **OR SEARCH CRITERIA** section of the **ORPS OR SEARCH & REPORTS** page.
  - c. Select **1. Occurrence Report No.** from the **IDENTIFICATION** selection box.
  - d. Click on the **REFINE** command button.
  - e. Select **ALO** from the **FO** selection box.

### HINT



It is not necessary to select **ALO** from the **FO** selection box. However, including the Field Office information will improve system performance.

- f. Select **LANL** from the **CONT** selection box.
  - g. Select **1996** from the **YEAR** selection box.
  - h. Type **1** in the **NUM** edit box.
  - I. Remove the check mark from the **CANCELED** check box in the **EXCLUDING** section of the **ORPS OR SEARCH & REPORTS** page.
2. Display the listing of records and identify the facilities.
  - a. Select the **SCREEN** command button. Note that the occurrence report number (including the facility identifier) is displayed in the listing.

## Exercise 10

(Note that there are multiple ways to solve this exercise. Only one solution is presented here.)

1. Create a new search profile that contains occurrence reports with Notification Dates between December 15, 1996 and December 22, 1996.
  - a. From the **ORPS GUI** home page, click on the **Search & Reports** hyperlink.
  - b. Click on the **NEW** command button in the **OR SEARCH CRITERIA** section of the **ORPS OR SEARCH & REPORTS** page.
  - c. Select **32. Notification Report** from the **CHRONOLOGY** selection box.
  - d. Click on the **REFINE** command button.
  - e. Check the **=** check box in the **NOTIFICATION REPORT** selection area.
  - f. Select **1996** from the **YEAR** selection box and select **12** from the **MONTH** selection box.
  - g. Select **15** in the **DAY** selection box then scroll down the box and select **22** with a **[SHIFT]+[CLICK]**.  
(The numbers 15 through 22 should be highlighted in the **DAY** selection box.)
  - h. Click on the **FINISH** command button.

## Exercise 11

(Note that there are multiple ways to solve this exercise. Only one solution is presented here.)

1. Create a new search profile that contains all Update, Update/Final, and Final Reports with Discovery Dates in the first quarter of 1997.
  - a. From the **ORPS GUI** home page, click on the **Search & Reports** hyperlink.
  - b. Click on the **NEW** command button in the **OR SEARCH CRITERIA** section of the **ORPS OR SEARCH & REPORTS** page.
  - c. Type **8 AND 27 AND 27** in the **BOOLEAN LOGIC SPECIFICATION** edit box.
  - d. Click on the **REFINE** command button.
  - e. Select **F-Final** from the **OR TYPE** selection box, then add **X-Update/Final** and **U-Update** to the selection by doing a **[CTRL]+[CLICK]**.
  - f. Check the = and > check boxes in the first **DISCOVERY** selection area.
  - g. Select **1997** from the **YEAR** selection box and **01** from the **MONTH** selection box in the first **DISCOVERY** selection area.
  - h. Check the = and < check boxes in the second **DISCOVERY** selection area.
  - I. Select **1997** from the **YEAR** selection box and **03** from the **MONTH** selection box in the second **DISCOVERY** selection area.
  - j. Click on the **FINISH** command button.

## Exercise 12

(Note that there are multiple ways to solve this exercise. Only one solution is presented here.)

1. Create a new search profile that contains occurrence reports that were rejected during the last quarter of 1995 or the first quarter of 1996.
  - a. From the **ORPS GUI** home page, click on the **Search & Reports** hyperlink.
  - b. Click on the **NEW** command button in the **OR SEARCH CRITERIA** section of the **ORPS OR SEARCH & REPORTS** page.
  - c. Select **36. Rejected** from the **CHRONOLOGY** selection box.
  - d. Click on the **REFINE** command button.
  - e. Check the **USE RANGE** check box in the **REJECTED** selection area.
  - f. Click on the **REFINE** command button.
  - g. Check the = and > check boxes in the first **REJECTED** selection area.
  - h. Select **1995** from the **YEAR** selection box and **10** from the **MONTH** selection box in the first **REJECTED** selection area.
  - I. Check the = and < check boxes in the second **REJECTED** selection area.
  - j. Select **1996** from the **YEAR** selection box and **03** from the **MONTH** selection box in the second **REJECTED** selection area.
  - k. Click on the **FINISH** command button.

## Exercise 13

1. Start a new search profile that contains occurrence reports with the word “evacuat” with any possible ending in the subject or title for the Rocky Flats Operations Field Office.
  - a. From the **ORPS GUI** home page, click on the **Search & Reports** hyperlink.
  - b. Click on the **NEW** command button in the **OR SEARCH CRITERIA** section of the **ORPS OR SEARCH & REPORTS** page.
  - c. Select **2. Operations/Field Office** from the **IDENTIFICATION** selection box.
  - d. Select **44. Subject/Title** from the **NARRATIVE** selection box.
  - e. Click on the **REFINE** command button.
  - f. Select **RFO-Rocky Flats Operations** from the **OPERATIONS/FIELD OFFICE** selection box.
  - g. Type **evacuat\*** in the **SUBJECT/TITLE** edit box.
2. Screen the profile and verify the report selection. What varieties of the word “evacuate” were recovered?
  - a. Click on the **SCREEN** command button. Varieties of the word evacuate include “evacuation” and “evacuated.”
3. Revise the profile to contain occurrence reports with the word “evacuat” with any possible ending in the subject or title for the PU Fabrication facilities.
  - a. Select the **BACK** button from the browser button bar.
  - b. Select **5. Facility** from the **IDENTIFICATION** selection box.
  - c. Click on the **REFINE** command button.
  - d. Click in the **FACILITY** selection box and type **P**. Scroll down the selection box and select **PUFAB - Pu Fabrication Pyrochemical Ops**. Scroll down the box to **PUFABOPS1 - Pu Fab Pyrochemical Ops \*\*Inactive\*\***, **PUFABOPS2 - Pu Fab Pyrochemical Ops \*\*Inactive\*\***, and **PUFABOPS3 - Pu Fab Pyrochemical Ops \*\*Inactive\*\***, and add these items to the selection by doing a **[CTRL]+[CLICK]** on each one.
4. Screen the profile and verify the report selection.
  - a. Click on the **SCREEN** command button.

### Exercise 13 (Continued)

*(Alternate solution)*

3. Revise the profile to contain occurrence reports with the word “evacuat” with any possible ending in the subject or title for the PU Fabrication facilities.
  - a. Click on the **INCLUDE** radio button at the top of the **OR SCREEN OR SEARCH CRITERIA** page.
  - b. Click on the check boxes next to the PU Fabrication facilities.
  - c. Click on the **REFINE** command button.

## Exercise 14

1. Start a new search profile that contains occurrence reports with the exact phrase “fall protection” in the subject or title.
  - a. From the **ORPS GUI** home page, click on the **Search & Reports** hyperlink.
  - b. Click on the **NEW** command button in the **OR SEARCH CRITERIA** section of the **ORPS OR SEARCH & REPORTS** page.
  - c. Select **44. Subject/Title** from the **NARRATIVE** selection box.
  - d. Click on the **REFINE** command button.
  - e. Type “**fall protection**” in the **SUBJECT/TITLE** edit box.
2. Screen the profile and verify the report selection.
  - a. Click on the **SCREEN** command button.
3. Revise the profile to contain occurrence reports with the exact phrase “fall protection” in the subject or title and stemmed variations of “procedure” in the cause narrative.
  - a. Click on the **BACK** button from the browser button bar.
  - b. Scroll down the **NARRATIVE** selection box and add **53. Cause Description** to the selection with a **[CTRL]+[CLICK]**.
  - c. Click on the **REFINE** command button.
  - d. Type **procedur\*** in the **CAUSE DESCRIPTION** edit box.
4. Screen the profile and verify the report selection.
  - a. Click on the **SCREEN** command button.



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