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7. Abstract

This document describes the use of the Activity Management System by its end users.

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ACTIVITY MANAGEMENT SYSTEM USER REFERENCE MANUAL

1.0 INTRODUCTION

The Activity Management System (AMS) application, as installed in a user site, is not configured to support storing sensitive information or processing essential functions as defined in A-6700-382R *Computer System Evaluation (Instructions)*. If you wish to use AMS for either (or both) of these purposes, you must prepare a *Computer System Evaluation Form*, A-6700-382 (WEF004), for your installation, and submit it to the Westinghouse Hanford Company (WHC) Computer Protection Program Manager (CPPM), as instructed on the form. This submission will be followed by a second, more detailed Application Risk Assessment that is used by the CPPM to evaluate whether adequate levels of physical and procedural protection have been established to comply with U.S. Department of Energy (DOE) and WHC requirements.

The AMS was developed in response to the need for a simple-to-use, low-cost, user interface system for collecting and logging Hanford Waste Vittrification Plant Project (HWVP) activities. This system needed to run on user workstations and provide common user access to a database stored on a local network file server. Most important, users wanted a system that provided a management tool that supported their individual process for completing activities. Existing systems treated the performer as a tool of the system.

Because of this, a site activity was undertaken to define the requirements for a tracking application that could be used site wide. Although the evaluation team looked at more than 60 Commitment Tracking Systems (CTS) that were already in use, none was found that was widely accepted or which provided most of the necessary functions.

The systems reviewed individually had some, but none of the systems had all, of the needed characteristics, including the following:

- A method for obtaining a "buy-in" from those individuals tagged with completing a work task
- The ability for users to adjust "due dates" once entered
- An authorization process for limiting access to portions of the database to third-party individuals based on interest and need
- A low percentage of "out-of-date" or "delinquent" information (evidence that the system was not actively used or that information was too difficult to modify after it had been entered)
- Reliance on a single point of data entry rather than user access to the database directly; needed to avoid data entry by single individuals to make the system responsive and up-to-date

- A general agreement among users as to how such systems should perform or what they should do; users were not the "owners" of the system.

Concurrent with this investigation, the HWVP Project initiated an upgrade of its existing CTS for all the reasons stated above. The project's CTS was not adequate to keep up with the volume of activities the project was generating and not flexible enough to adequately meet the needs of the project. A replacement tracking system was required to support collecting and logging various activities whether or not these activities met the usual definition of a "commitment."

The resulting application, AMS, has been designed to be flexible enough to function in a wide range of roles from that of a classical CTS to one of a personal management tool for individual private "to do" lists. Based on in-process reviews of the AMS concepts and application prototype by the site evaluation team and the Data Administration Council (DAC), it has been confirmed that the application satisfies all the essential requirements that have been defined as necessary in a site-wide system.

The AMS stores activity data in a relational database using the Paradox 4.0* database management software. Each independent project or work group installs the AMS database on a single Hanford Local Area Network (HLAN) file server. Individuals with HLAN access who are registered AMS users can interactively operate on any AMS data for which they have been authorized access.

All AMS data is maintained in encrypted format. Users can feel confident that any activities they have entered into the database are private and that, as the originator, they retain sole control over who can see them. Once entered into the AMS database, the activities cannot be accessed by anyone other than the originator, the designated agent, or by authorized viewers who have been explicitly granted the right to look at specific activities by the originator.

This user guide is intended to assist new AMS users in learning how to use the application and, after the initial learning process, will serve as an ongoing reference for experienced users in performing infrequently used functions. Online help screens provide reference to some of the key information in this manual. Additional help screens, encompassing all the applicable material in this manual, will be incorporated into future AMS revisions. A third, and most important, source of help is the AMS administrator(s). This guide describes the initial production version of AMS, which has been designated Revision 1.0.

*Paradox is a trademark of Borland International.

2.0 BEFORE YOU BEGIN

This section presents an overview of the AMS and discusses what computer equipment is needed, what computer skills you will be required to know, and how to set up your computer to run AMS.

2.1 OVERVIEW

A general familiarity with AMS, its structure, and its process flow will be of great help in effectively using the system. The AMS is structured around the task of creating and maintaining the data needed to describe various activities of interest to the users. This function is depicted graphically in Figure 2-1 and described in the text below.

1. Activity Definition

Figure 2-1 shows that the initial step in introducing a new activity into AMS is that of its definition by an AMS user, who is then called the "originator" of that activity. The definition process consists mostly of entering descriptive data into the computer (see Figure 6-1).

As part of the definition process, the originator is able to choose an "agent"--an individual who will be requested to perform a service or produce a deliverable that is the subject of the activity. The agent is notified of the request by means of a cc:Mail* message generated automatically by the AMS. Originators can designate themselves as the agent thus creating what is called a "personal item." Unless the originator assigns one or more viewers (see below), no one else will be able to see a personal item.

The originator also may designate one or more "viewers." This allows AMS users other than the originator or agent to look at (but not change) an activity's data. While this allows for oversight by other persons, it keeps the control of who can see data and what specific data they can see strictly in the hands of the originator.

2. Activity Validation

When a user receives a request to be an agent, the option is available of "validating" or, in other words, accepting the request. Other options are available to refuse the request (generating automatic cc:Mail notification to the originator) or to "do nothing," leaving the activity unvalidated. This "do-nothing" option allows the proposed agent to look at all requests before acting on any of them or to work with the originator to plan and manage the work. Until the activity is validated by its agent, no assigned viewer will be able to retrieve it.

*cc:Mail is a trademark of the Lotus Company.

In the case of a personal item, the originator is also the agent and the activity is automatically validated. Thus, viewers will be able to retrieve the activity as soon as it has been entered.

Once an activity has been validated, the "original due date" is locked and cannot be changed without deleting the agent.

3. Status activity

Once the activity has been defined and validated, it enters a period where the agent is able to update the status and, ultimately, enter a completed date, when the deliverable (if any) is finished or the service has been performed as agreed.

During this time, the originator is able to modify the "adjusted due date" to reflect a modification in the agreement with the agent. The system only recognizes delinquent items based on this "adjusted due date," not the "original due date."

The originator can also modify the other data fields except for the originator name, identification (ID) number, and original due date. The originator can also clear the agent (after which the original due date can be modified if the activity is to receive a new agent). Options are available for users to view and report an activity, or groups of activities, during the status period.

4. Close Activity

The originator may close an activity at any time by selecting the activity to be closed and performing a specific AMS function. After closing, an activity will no longer be retrieved unless a special "retrieve closed activities" option is set. Closed activities may be reopened.

5. Purge Activity

This function is not shown on Figure 2-1 because it is not a user-controlled function. Periodically, the AMS administrator will run a function that moves closed activities older than a specified time period to a separate archive table. Once in this table, these activities may be "unpurged" by the AMS administrator in case they must be used in year-end reports, special analyses, etc.

Additional details about individual AMS functions and their uses are found in Sections 3.0 through 11.0, and in the Appendix. It is especially recommended that you review the Appendix before using the system because it covers the techniques used to interact through the monitor, mouse, and keyboard. Detailed specifications and software design descriptions can be found in WHC-SD-HWV-SDP-004, *Small Job Development Software Project Documentation for the Activity Management System* (Gates 1994).

2.2 BECOMING AN AMS USER

The first step in using AMS is to locate the AMS administrator (or other necessary individual) as specified for your organization and obtain an AMS user ID and password. Because the identity of this person and the rules for administration can be expected to vary among different AMS user groups, these details are not included in this manual.

Next the AMS software must be installed on your workstation (normally, your administrator will also arrange this).

2.3 EQUIPMENT NEEDED

To use the AMS application, the following computer equipment and software are needed:

- An IBM¹-compatible 386SX, 386DX, or 486 personal computer with a minimum of 4 MB of main memory (random access memory)
- A VGA or higher resolution monitor
- A hard disk drive with at least 5.0 MB of free space. (The HLAN user's [U:] drive can be used for some of this hard disk requirement, but performance will be slowed.)
- DOS 3.3 or higher (DOS 4.0 is not recommended)
- A connection to the HLAN.

Additionally, the following options may be needed or highly desirable:

- A network or local printer with LaserJet² II, III, or greater compatibility
- A Microsoft³ or Logitech⁴ mouse (or any other mouse that is 100% compatible with one of these)
- An upgrade to the current Hanford Site core system software--DOS 5.0, Windows⁵ 3.1, and the new local area network (LAN) manager. (NOTE: Windows is not needed for AMS.)

¹IBM is a trademark of International Business Machines, Inc.

²LaserJet is a trademark of the Hewlett-Packard Corporation.

³Microsoft is a trademark of the Microsoft Corporation.

⁴Logitech is a trademark of Logitech, Incorporated.

⁵Windows is a trademark of the Microsoft Corporation.

2.4 COMPUTER SKILLS REQUIRED

The AMS requires knowledge of the following basic computer skills:

- How to use the mouse (if you have one) to select menu items and perform other operations. (A mouse is not required to operate AMS, but is preferable for convenience and optimum efficiency.)
- The ability to navigate around the AMS screens, choose commands from the menus, and select other options without a mouse, if your system is not so equipped. (See the Appendix.)
- The techniques for opening memo edit fields and using the scroll bars. (See the Appendix.)
- How to start and quit the application. (See Section 3.0.)

2.5 INSTALLING AMS

The AMS can be installed in a number of ways to use more or less of your workstation's hard disk. Because the best method for use in a given situation will vary widely, determination of the best configuration for any individual installation of the AMS will be determined by the software developers, who will install the application on your workstation, or set up the means to execute the application from the server.

Figure 2-1. Activity Management System Process Flow.

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3.0 STARTING AMS

With AMS installed (see Section 2.5), you are ready to start the application and log in. The AMS is an MS-DOS application and it is not necessary to have Windows installed on your computer, or use it to run AMS. The AMS can run under Windows, thus providing the ability to switch between AMS and other applications and network programs without exiting from AMS.

Once AMS has been started using the DOS or Windows procedure detailed below, and the AMS login screen (see Figure 3-1) is displayed on your screen, the rest of the user interface is the same, whether starting from MS-DOS or from Windows.

3.1 STARTING AMS UNDER DOS

To start the AMS application from the DOS prompt, proceed with the following:

1. Select AMS from the HLAN Menu, OR
2. From the DOS prompt ("C:>", or some variation) type CD \PDOXDATA [enter] and then "RUNAMS" [enter]. After several seconds, you will see the AMS login screen (see Figure 3-1).

3.2 STARTING AMS UNDER WINDOWS

To start the application from the Windows desktop:

1. Double-click the mouse on the icon you have selected to represent AMS. The Windows screen will disappear and the computer will enter the DOS full-screen mode. After a few seconds, you will see the AMS login screen (see Figure 3-1).

3.3 FROM DOS OR WINDOWS

1. After one of the two steps above, key your user ID into the field labeled "Login name" and your password into the "Password" field (see Figure 3-2) and [enter].
2. As the login process is performed, several messages (on a red bar) will appear in the lower right corner. This is normal. If there is a problem, the process will halt with the applicable error message displayed. Once the login process is complete, the application will display the AMS main screen (see Figure 4-1).
3. Proceed to select the function you wish to perform. (See Section 4.0.)

Figure 3-1. Activity Management System Login Screen.

Figure 3-2. Login Dialogue Box.

4.0 THE AMS MAIN SCREEN FUNCTIONS

The AMS main screen (Figure 4-1) is the top-level screen, after login, from which all AMS functions are selected. As the various functions are performed, they ultimately return you to the main screen. The main screen is the only location from which you can exit AMS normally.

When the main screen is displayed after you have logged in, a message will be displayed in the lower right corner indicating the number, if any, of unvalidated activities on which you have been requested to be the agent. You may validate these activities immediately after you log in, or at a later time. You will continue to see the "unvalidated activity" message each time you log in until you perform the validation. Validation consists of accepting or refusing the assignment through use of the "Validate" selection under the "Activity" menu (see Figure 4-2). You will not be able to retrieve or view these activities except by use of the "Validate" function.

The white area located horizontally, across the top of the main screen is called a "menu bar." The "words" arrayed across the menu bar are the AMS commands that can be selected from the menu. Each of these functions is described fully in the following sections. Each menu selection and field has a "hot key" designation that represents the key character used to jump directly to that location (see the Appendix, Section A.1.1). The main screen menu selections are as follows.

1. The System Menu [$\equiv$], at the far left of the menu bar, is represented by three parallel, horizontal lines. Selecting this command enables a further choice of two functions:
 - 1.a Change Password [P]
 - 1.b Defaults [D]
2. The Activity Menu [A] allows selection of AMS functions dealing with specific activities. The three choices provided (see Figure 4-2) are as follows:
 - 2.a Create [C] new activity
 - 2.b Validate [V] any unvalidated activities
 - 2.c Retrieve [R] activities
3. The Lists Menu [L] (Figure 4-3) offers functions to support creating and maintaining the three types of lists supported by AMS. These are as follows:
 - 3.a User Lists [U]
 - 3.b Activity Groups [A]
 - 3.c Mail Lists [M]
4. Selecting the Help Menu [H] brings up the on-line help index (Figure 4-4) which lists the help screens that are available (see Figure 4-5 for sample).
5. The Admin selection is reserved for use by AMS administrator(s). If the user is not an AMS administrator, this command will be "dimmed out" and will not function.

6. The "Exit" [X] selection is used to quit the AMS application. Selecting this brings up the pull-down menu choices "No" [N] or "Yes" [Y] (Figure 4-6). Choosing "No" returns you to the main screen, while "Yes" terminates the AMS and returns you to either the DOS screen or the Windows Desktop, depending on where you were when you started AMS.

Figure 4-1. Activity Management System Main Screen.

Figure 4-2. Activity Menu.

Figure 4-3. Lists Menu.

Figure 4-4. Activity Management System Help Index.

Figure 4-5. Sample of Help Text Screen.

Figure 4-6. Activity Management System Exit.

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5.0 SYSTEM MENU [=] FUNCTIONS

At this time, AMS has only one function implemented under this selection: "Change Password" [P]. Nothing has been implemented yet for "Defaults" [D], but the option is being left for possible future use.

5.1 CHANGE PASSWORDS [P]

Choosing "Change Password" [P] will bring up a single dialogue box with three text boxes (Figure 5-1). Type your current password into the first of these. Next, type the desired new password into each of the next two boxes (to protect against typing errors). The display shows asterisks in place of the actual passwords to permit a check on the number of characters typed, without displaying the actual passwords to anyone who might be watching the screen.

Once the requested password data has been entered, press the action button labeled "Change" [C] to actually perform the change. The AMS verifies that the current password has been entered correctly, compares the two copies of the new password to ascertain that they match, and updates the password field in the user table.

Once "Change" has been activated and the new password has been inserted, you must use the new password the next time you log into AMS. Be sure to remember it!

If you have made an error in entering the old password, or the two repetitions of the new password do not match, you will hear a "beep" and see a message displayed in the lower right corner of the screen.

A "Cancel" [A] button is also provided. Selecting this at anytime before activating the "Change" button will terminate the "Change Password" operation and leave the old password unchanged.

The following "hot keys" are provided for moving the cursor around the "Change Password" dialogue box with the keyboard:

- *Alt-U*--Move to "Current Password" text box.
- *Alt-N*--Move to "New Password" text box.
- *Alt-G*--Move to "New Password Again" text box.

5.2 DEFAULT [D]

Selecting this menu choice will bring up a display box (Figure 5-2) with a message stating that the command has not been implemented yet. A single "OK" button is used to return to the Main Menu.

Figure 5-1. Change Password Dialogue Box.

Figure 5-2. Default Command Text Box.

6.0 CREATING A NEW ACTIVITY

A primary function of the AMS is the creation of new activity records in the AMS database. This function is initiated by selecting the "Create" [C] command from the "Activity" pull-down menu that results from selecting "Activity" [A] from the Main Menu bar. The "Create" selection causes a "Data Entry Form" to be opened (Figure 6-1). This form consists of 13 text fields, including 3 memo fields. (See the discussion in the Appendix, Section A.5, on memo fields and the use of the Editor to enter and change the text in them.)

You are only required to enter data into two of the activity fields (the AMS will enter the ID number): these are the title and the due date. Attempting to perform a "next," "clone," or "exit" menu selection with either of these fields missing will result in an "Invalid Activity" warning message (Figure 6-2) with action buttons that allow you to "Return" [R] to the Data Entry Form, or "Abandon" [A] the activity and lose the data.

Steps to Create an Activity (from the Main Screen):

1. Select the "Activity" [A] menu bar command.
2. Select the "Create" [C] command from the "Activity" pull-down menu. This will open the Data Entry Form (Figure 6-1). The AMS prefills the ID field with a system-generated, unique ID number, and inserts the originator's name in the Originator field and the words "Not Assigned" in the Agent field. Any fields that you cannot change or enter data into will be colored red.
3. Enter an activity title. This is a required field and can be any text, up to 30 characters in length, that will assist you to identify the activity being created. The AMS does not edit the data entered into this field. The activity title does not have to be unique because that characteristic is guaranteed by the system-generated "ID" field.

If future retrieval of activities from the database based on the title is desired, keep in mind that the selection will be based on any pattern of letters or whole words from this title. It is important to devise good titles that can be used to identify specific activities as uniquely as possible and yet which might also be useful for retrieving related sets of activities. This selection by match will be case sensitive unless you employ wildcard characters (see the Appendix, Section A.6).

4. Enter an agent, if desired (optional at the time of creation), or tab to the Priority field (also optional). To select an agent, choose the "Find Agent" [A] command from the menu bar. This will open the pull-down menu (Figure 6-3) offering two choices: "FindAgent" [F] and "Clear" [C].

Choose "Agent" [F] to open the AMS User Names dialogue box (see Figure 6-4). This dialogue box consists of the following:

- A display box used in retrieving names from the AMS user table
 - A text box for entering all or part of a name to be matched in searching the AMS users
 - A "Search" [S] action button
 - An "OK" [O] action button
 - A "Cancel" [C] action button
- 4.a Type a name (or several leading characters of a last name) into the text box and select "Search."
 - 4.b All AMS user's names that match the characters entered will be displayed in the display box under the title "Retrieved Names."
 - 4.c Click on the name desired or tab to the display box and use the up and down arrow keys to highlight the desired name.
 - 4.d Activate the "OK" [O] button, by clicking with the mouse or pressing *Alt-O*, to transfer the selected name to the Agent field of the Activity form.
 - 4.e The "Cancel" [C] button may be activated at any time to return you to the Activity form with "Not Assigned" in the "Agent" field.
 - 4.f The "Clear" command is used to delete a selected "Agent" and return the "Agent" field to "Not Assigned."
5. Enter a priority code, if desired. This can be any three characters (letter or number) you choose. While optional, this is an AMS search field and the search is case sensitive (unless wildcard operators are used; see the Appendix, Section A.6). This field aids in grouping related activities. The AMS does not restrict or check this value except for length.
 6. Enter a Prerequisite Code, if desired (optional at the time of creation). Type in a code if you know of one or else choose from a list of predefined codes. To access a list of predefined Prerequisite Codes, choose the "Lookup" [L] command from the menu. This will open the pull-down menu (Figure 6-5) offering four choices: "Prerequisite List" [P], "Clear Prerequisite List" [C], "Category Codes" [A], and "Clear Category Code" [L]. Choose "Prerequisite List" [P] to open the Prerequisite List Lookup dialogue box (see Figure 6-6). This dialogue box consists of the following:
 - A display box used to display Prerequisite Codes
 - An "OK" [O] action button
 - A "Cancel" [C] action button.

- 6.a Select the Prerequisite Code desired by either clicking the mouse on the code or using the up or down cursor movement keys to select the code.
 - 6.b Activate the "OK" [O] button by clicking with the mouse or pressing Alt-O to transfer the selected code to the Prerequisite Code field of the activity form.
 - 6.c Activate the "Cancel" [C] button, by clicking with the mouse or pressing Alt-C to not select a code and to leave the Prerequisite Code field of the activity form as it was.
 - 6.d The "Clear Prerequisite List" is used to clear the Prerequisite Code field.
7. Enter a Category code, if desired (optional at the time of creation). Type in a code if you know of one or else choose from a list of predefined codes. To access a list of predefined Category Codes, choose the "Lookup" [L] command from the menu. This will open the pull-down menu (Figure 6-5) offering four choices: "Prerequisite List" [P], "Clear Prerequisite List" [C], "Category Codes" [A], and "Clear Category Code" [L]. Choose "Category Codes" [P] to open the Category Code Lookup dialogue box (see Figure 6-7). This dialogue box consists of the following:
 - A display box used to display Category Codes
 - An "OK" [O] action button
 - A "Cancel" [C] action button.
- 7.a Select the Category Code desired by either clicking the mouse on the code or using the up or down cursor movement keys to select the code.
 - 7.b Activate the "OK" [O] button by clicking with the mouse or pressing Alt-O to transfer the selected code to the category field of the activity form.
 - 7.c Activate the "Cancel" [C] button by clicking with the mouse or pressing Alt-C to not select a code and to leave the category field of the activity form as it was.
 - 7.d The "Clear Category Code" is used to clear the category field.
8. Enter the number of an associated reference document in "Ref Doc," if desired. This field is optional and can hold up to 20 alphanumeric characters. The information entered is not checked by the AMS for specific values.
9. Enter a due date. This field is required and must be a valid date in the form mm/dd/yy. If the date entered is prior to the current day's date (loaded from HLAN), a warning will be displayed. This warning can be ignored if a retroactive date is desired.

10. The Current Due Date field can only be accessed during the update process. The Completion Date can only be entered by the agent.
11. Enter a task description, status, and deliverable description, if desired. These three fields are memo fields and can be of almost unlimited length. To "open" the field for entry, move the mouse pointer to the desired field and click twice. Optionally, you can select "MemoEdit" [M] from the menu bar. Either method will open a submenu with selections for "Description" [D], "Status," or "Deliverable" [E] that are used to open the desired field.

See the Appendix, Section A.5, for a description of the editor used to enter text into these fields. NOTE: The AMS inserts today's date at the top of the status field each time it is opened. This date can be deleted or changed, if desired.

12. When all initial data entry is complete, you may take several actions.
- 12a. Select "Exit" [X] from the menu bar if you wish to save the Activity record and return to the Main Screen. This will open a submenu (see Figure 6-8):

- Select "Yes" [Y] from the pull-down menu to save the activity data you have just entered, and return to the Main Screen.
- Select the "Add Viewers" [A] command to attach individual viewers or viewing (user) lists to the Activity record. (See the "Viewing Lists" description in Section 7.9.1 for a description of this function.)

NOTE: The "Main Menu" command is not available from the "Create" function.

- 12b. Select "Next" [N] from the menu bar if you wish to save the information in the form and enter another activity. You will then be given a pull-down menu (Figure 6-9) with two choices:

- "Yes" [Y] saves the activity data you have just entered, clears the data entry form of the data you just entered, and inserts a new Activity ID so that you may create another activity record.
- "Add Viewers" [A] permits you to attach individual viewers or viewing (user) lists to the new Activity record before storing it in the database. (See the "Viewing Lists" description in Section 7.9.1 for a description of this function.)

- 12c. Select "Clone" [C] to terminate the current activity and copy its data to a new one. You will be presented with a submenu (Figure 6-10) with two choices:
- "Yes" [Y] saves the activity data you have just entered and inserts a new Activity ID so that you may create another activity record based on data in the original.
 - "Add Viewers" [A] permits you to attach individual viewers or viewing (user) lists to the new Activity record. (See the "Viewing Lists" description in Section 7.9.1 for a description of this function.)
- 12d. Select "Cancel" [C] to terminate the "Create" function and return to the Main Screen without saving the Activity data you have entered. You will be given a submenu (Figure 6-11) with two choices:
- "Yes" [Y] confirms the "Cancel" command and returns you to the Main Screen unless you have performed a "Clone" operation on an activity selected from the Retrieved Activities screen (Section 7.5). In this case, "Yes" will return you to that screen.
 - The second choice, "Main Menu," is only unavailable from the "Create" function. This function is only used when you have executed the "Clone" function from the Retrieved Activities screen (Section 7.5). It returns you directly to the Main Screen.
13. To delete all data that you have entered during your current data entry or updating session, select the "Undo" [U] command from the menu bar. You will be presented with a warning screen (Figure 6-12) to give you a chance to change your mind. You can select the "Undo" [U] action button to continue the erasure, or you can choose "Cancel" [C] to return to the Data Entry screen.

MemoEdit Agent Lookup		Next	Clone	Exit	Cancel	Undo
Data Entry Form						
Title: Sample for AMS User Manual				ID:	18	
Originator: Burdick, Mike B				Priority:	AIA	
Agent: Not Assigned				Ref. Doc:	L23-45678-901234	
Prereq Code: 5 COMP MCPH				Val:	Status:	
Category: 1000 19 01				ADMINISTRATIVE		
Due Dates						
Original: 6/01/94		Adjusted:		Completed:		
Desc: Sample activity for use in AMS User Manual...						
Shows first 4 lines						
Line 3						
Line 4						
Status: 5/02/94						
This activity created as a sample for inclusion in the AMS User Manual.						
Shows first 7 lines						
Line 4						
Line 5						
Line 6						
Line 7						
Deliverable: Sample activity						
Activity Management System Version 2.0				Mon 2 May 1994		

Figure 6-1. Data Entry Form.

Adjusted:	Completed:
Invalid Activity	
<p>The activity you have entered does not have a title and/or a due date. A activity must have both before it can be entered into the system.</p>	
Return	Abandon

Figure 6-2. Invalid Activity Warning Dialogue Box.

The screenshot shows a form titled "MemoEdit Agent Lookup". It contains several fields: "Title:" with a dropdown menu showing "Find Agent" and "Clear"; "Originator:"; "Agent:"; "Area Code:" with the value "6"; "COMP NEPA"; "Category:" with the value "1000.19.01"; and "Due Date:". A vertical bar on the right side of the form has the letters "U" and "B" visible.

Figure 6-3. Agent Menu.

The screenshot shows a "Select Agent" form. At the top, there is a menu bar with "MemoEdit Agent Lookup", "Next", "Clone", "Exit", "Cancel", and "Undo". Below the menu bar, there is a "Date Entry Form" and "AMS Over Name". The main area of the form is titled "Retrieved Names" and contains a list of names. Below the list, there is a "Home" button and a "Search" button. At the bottom of the form, there are "Ok", "Select Agent", and "Cancel" buttons. The status bar at the bottom of the window displays "Activity Management System | Version 2.0" and "Mon 2-May-1994".

Figure 6-4. Select Agent Form.

Figure 6-5. Lookup Menu.

Figure 6-6. Prerequisite List Lookup Dialogue Box.

Figure 6-7. Category Code Lookup Dialogue Box.

Figure 6-8. Data Entry Form Exit.

Previous Next Clone Exit

Data Entry Form

ser Manual

Yes

Add viewers

ori

ID

Val. Stat

ADMINISTRATIVE

Adjusted: Completed

for use in AMs User Manual.

Figure 6-9. Data Entry Form "Next."

Agent Previous Next Clone Exit Cancel

Data

Yes

Add viewers

ID:

ates, Theodore A Jr

priority:

Not Assigned

ef. Date:

Due Dates

Adjusted: Completed:

Figure 6-10. Data Entry Form, Clone Menu.

Figure 6-11. Data Entry Form Cancel Menu.

Figure 6-12. Undo Command Warning Message.

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7.0 RETRIEVING ACTIVITIES FROM THE AMS DATABASE

Once activities have been defined and stored in the database, all other operations affecting them must begin with retrieving one or more activities from the database. To facilitate this important function, a number of different methods for retrieving data have been included in the AMS application. These are described in the individual sections below.

To retrieve data, select the "Activity" [A] command from the main menu bar. This will bring up the Activity drop-down menu (Figure 4-2). Next, select the "Retrieve" [R] command from that menu. This, in turn, brings up the retrieve submenu (Figure 7-1), with eight choices: "By Group" [G], "By Role" [R], "By Match" [M], "By Validation" [V], "By Completion" [C], "By Delinquency" [D], "By Prerequisite" [P], and "By Category" [A].

Normally, the following retrieve commands only return activities that have not been closed. However, every command has an option that can be selected to "Include Closed Data." This is activated by setting an "X" in the appropriate check box.

7.1 RETRIEVAL BY ACTIVITY GROUP [G]

Activity groups are user-defined groupings of activities. Groups can consist of any activities you are entitled to view, either as originator, agent, or by being on a viewing list. Groups are defined by the "Activity Groups" [A] command of the "Lists" [L] function of the Main Menu (see Section 9.2). The main purpose of these groups is to facilitate retrieval of sets of activities rather than have to retrieve each individually. Activities may be grouped for any purpose, but are most frequently used to group related activities for updating or reporting.

The population of a group remains fixed once the activities have been assigned and only changes automatically when items are closed. Activities can be deleted or additional activities can be assigned manually by performing the appropriate function (see Sections 7.9.1 and 9.2.1).

To retrieve by groups:

1. Choose the "Retrieval" [R] command from the Main Menu. This brings up the retrieve submenu (Figure 7-1).
2. Choose the "By Groups" [G] command from the retrieval submenu. This brings up a dialogue box with a pick list of all the groups you have defined (Figure 7-2). If you have defined no groups, an error message will inform you of this and return you to the main screen.
3. Select the group desired for retrieval from the pick list by clicking the mouse or using the keyboard.
4. If you wish to include closed activities, select the "Include Closed Activities" [I] box, and then select the "OK" [O] action button.

5. The retrieve by group function may be terminated by selecting the "Cancel" [C] action button at any time prior to activating "OK."
6. Execution of this retrieval brings up the "Retrieved Activities" form described in Section 7.5.

7.2 RETRIEVAL BY ROLE [R]

This retrieval function selects activities based on your role in relation to the activity. You must be one of the following: originator, agent, or viewer. An activity also can be defined as a "personal item," that is, one in which you have defined yourself as the agent.

To retrieve by role:

1. Choose the "Retrieval" [R] command from the Main Menu. This brings up the retrieval submenu (Figure 7-1).
2. Choose the "By Role" [R] command from the retrieval submenu. This brings up a dialogue box (Figure 7-3) with a set of check boxes for "Originator" [O], "Agent" [A], "Personal Data" [P], and "Viewing List" [V].

You can specify any or all of these by clicking in the box or by moving the cursor to the box and pressing the space bar. (Pressing the space bar when the box is selected toggles the selection off.) When a check box is selected, an "X" will be turned on within the brackets. Continue this process until all desired roles have been selected.

3. To retrieve closed activities, select the "Include Closed Activities" option [I].
4. Execute the query by selecting the "OK" [O] action button or pressing "Enter," or terminate the function by selecting the "Cancel" [C] button. Pressing "Enter" or activating "OK" with no check boxes selected will execute the query but no activities will be returned.
5. When the query is executed, a list of activities matching the roles specified will be returned on the "Retrieved Activities" form described in Section 7.5.

7.3 RETRIEVAL BY MATCHING DATA [M]

This retrieval option is used when you wish to select one or more activities by using Boolean logic to match the data contained in the originator, agent, activity ID, title, due date, status date, or priority fields. (See the Appendix, Section A.6, for a list of the allowable search string logic operators.) The text fields are case sensitive in the match operation unless wildcard operators are employed (see the Appendix, Section A.6).

To retrieve by match:

1. Choose the "Retrieval" [R] command from the Main Menu. This brings up the retrieval submenu (Figure 7-1).
2. Choose the "By Match" [M] command from the retrieval submenu. This brings up a dialogue box titled "Retrieve by Pattern Matching" (Figure 7-4). This is a complex screen with facilities for selecting activities based on matching the data contained in one or more of a number of fields. Executing this query with all fields empty will bring up all activities that you are entitled to access.

You can specify that the activities to be retrieved should match a single user name, or the names contained in a list of user names that you have previously defined. The same possibilities can be specified for matching the agent. Either or both of these two fields can be left set to "Any User" so that all originators and/or agents will be accepted and the match will be determined by the contents of the other fields. (You will only see activities on which you are allowed access privileges based on being the originator or agent, or because you have been granted viewing privileges.)

The search will retrieve records that are the result of a logical "and" on the originator and agent fields. That is, if you specify Smith as the originator and Jones as the agent, you will see only those activities where Smith is the originator AND Jones is the agent.

Other fields are also provided to further restrict (or filter) the records that will be retrieved. These fields allow input of an activity ID number, a title (or part of a title), due date, the date of the last status update, or a priority code. Paradox query operators are allowed in these fields to enhance the flexibility of the search command (see the Appendix, Section A.6).

3. To retrieve closed activities with the match query, you must also select the "Include Closed Activities" check box.
4. Select the user and/or agent names (if desired), by entering three or more characters of the last name in the text box above the "Search for Name" action button and activate the button. If any AMS user names match the characters you entered, they will be listed in the display box under the "Search for Name" button.

You can then highlight one of these names and activate the "User" [E] action button under the originator text box, and/or the "User" [R] action button under the agent text box to copy the name from the list to the specified text box on the right side of the form. If you press the "Any User" [A] button under the "Originator" box or [Y] under the "Agent" box, any user names in those boxes will be replaced by the "Any User" designation.

5. The "User Lists" display box will always show all the user lists you have defined with the "User List" function (Section 9.1). System lists, defined by the AMS administrator, will not be shown. You may select any of these list names for the originator and/or agent name boxes instead of a single user name by pressing the "List" button under the appropriate field ([L] under the originator field or [I] under the agent field).
6. You may enter an activity ID number in the "Activity ID" [V] field, if you wish to search on that identifier.
7. If desired, you can enter any text string into the "Title" [T] field. This text may be accompanied by valid wildcard characters. (The "." wildcard character for matching any text string is handy when you can only remember part of a title. See the Appendix, Section A.6, for a description of all wildcard characters.)
8. A date may be inserted in the "Due Date" [D] field, if applicable. The "<" and ">" wildcards are especially useful along with the dates in this field.
9. A date to be matched to the date of the most recent status field update may be entered in the "Status Date" [S] field. Again, the "<" and ">" wildcard characters are particularly useful in this field.
10. Finally, a priority code may be inserted in the "Priority" [O] field.
11. After supplying the data desired for restricting the scope of the search, activate the "OK" [O] action button. If no activities match all the criteria supplied, a message will be displayed in the lower right corner of the screen stating "No activities found." If activities are retrieved, they will be listed in the "Retrieved Activities" form (Figure 7-5).
12. The "Cancel" [C] can be activated at any time to abandon the Match operation and return to the Main Screen.

7.4 RETRIEVAL BY VALIDATION STATUS [V]

This retrieval option allows for retrieval of activities where you are the originator, based on their validation status. Selecting this command brings up a dialogue box with five check boxes: "Unvalidated" [U], "Refused" [R], "Unassigned" [N], "Accepted" [A], and "Closed" [C] (Figure 7-6). Any or all of these boxes may be "checked" by pressing the space bar. Pressing the space bar on a box that is already selected will de-select it. Likewise, you may select or de-select by use of the *Alt* key combined with the "hot" key designated for the box. Finally, you may make a selection by clicking with the mouse.

To retrieve by any of these categories:

1. Choose the "Retrieval" [R] command from the Main Menu. This brings up the "Retrieve by Validation" dialogue box (Figure 7-6).
2. To retrieve all unvalidated activities, select "Unvalidated." If any such activities are found, they will be listed in the "Retrieved Activities" form (Figure 7-5).
3. To retrieve all activities that have no agent assigned, select "Unassigned." If any such activities are found, they will be listed in the "Retrieved Activities" form (Figure 7-5).
4. To retrieve all activities that have been accepted by the designated agent, select "Assigned." If any such activities are found, they will be listed in the "Retrieved Activities" form (Figure 7-5).
5. To retrieve all activities that are closed, select "Closed" [C]. If any such activities are found, they will be listed in the "Retrieved Activities" form (Figure 7-5).
6. You may combine selections to select more than one type in one search.

7.5 RETRIEVAL BY COMPLETION [C]

This query selects only those activities that have a date in the completion field, based on your role in relation to the activity. You must be one of the following: originator, agent, or viewer. An activity also can be defined as a "personal item," that is, one where you have defined yourself as the agent.

To retrieve by completion:

1. Choose the "Retrieval" [R] command from the Main Menu. This brings up the retrieval submenu (Figure 7-1).
2. Choose the "By Completion" [C] command from the retrieval submenu. This brings up a dialogue box (Figure 7-7) with a set of check boxes for "Originator" [O], "Agent" [A], "Personal Data" [P], and "Viewing List" [V].

You can specify any or all of these by clicking in the box or by moving the cursor to the box and pressing the space bar. (Pressing the space bar when the box is selected toggles the selection off.) When a check box is selected, an "X" will be turned on within the brackets. Continue this process until all desired roles have been selected.

3. To include closed activities, select the "Include Closed Activities" [I] option.

4. Execute the query by selecting the "OK" [O] action button or pressing "Enter," or terminate the function by selecting the "Cancel" [C] button. Pressing "Enter" or activating "OK" with no check boxes selected will execute the query but no activities will be returned.
5. When the query is executed, a list of activities matching the roles specified will be returned on the "Retrieved Activities" form described in Section 7.5.

7.6 RETRIEVAL BY DELINQUENCY [D]

The retrieval option is used to retrieve activities based on their delinquency status. Selecting this option brings up the Retrieved Delinquent Activities dialogue box (Figure 7-8). There are two selection choices, "Originator Role" [O] and "Agent Role" [A]. After you have selected either or both of these, execute the query by activating the "OK" [O] button. Activities that are delinquent that match your role as selected above will be retrieved and their titles displayed on the "Retrieved Activities" screen (Figure 7-5).

7.7 RETRIEVAL BY PREREQUISITE [P]

This query is used to retrieve activities based on their Prerequisite code. Selecting this option brings up the Retrieve by Prerequisite List dialogue box (Figure 7-9). Select the Prerequisite to retrieve from the list of prerequisites and select the "OK" [O] button. Activities that have that prerequisite will be retrieved and their titles displayed on the "Retrieved Activities" screen (Figure 7-5).

7.8 RETRIEVAL BY CATEGORY [A]

This query is used to retrieve activities based on their Category code. Selecting this option brings up the Retrieve by Category Code dialogue box (Figure 7-10). Select the Category to retrieve from the list of categories and select the "OK" [O] button. Activities that have that category will be retrieved and their titles displayed on the "Retrieved Activities" screen (Figure 7-5).

7.9 RETRIEVED ACTIVITIES

Any activities retrieved from the database by any of the above retrieval functions will be listed on a "Retrieved Activities" form (Figure 7-5). This form displays a listing of each activity that was retrieved, one line per item. Before any retrieved activities can be acted upon by one of the "Functions" [F] commands, they must be "checked" as described in Section 7.9.3.

A box at the lower right of the form will indicate the total number of activities retrieved by the command.

The menu bar contains a number of choices. These are detailed in the following sections.

7.9.1 Functions [F]

The "Functions" selection opens a submenu (Figure 7-11) displaying the different functions that can be performed on the "checked" [✓] activities.

The functions available are:

- Edit [E]

Will only select checked items if you are the originator or the agent. (See Section 8.0.)

- Clone [C]

A duplicate will be created, one at a time, from each "checked" [✓] activity. These "clones" will have new activity IDs, blank due dates, and the originator field will be set to the current user. Otherwise the "cloned" activities will be identical to the activities from which they originate. They will be displayed on the "Data Entry Form" (Figure 6-1) and can then be edited to modify various characteristics.

- Report and View [R]

See Section 11.0.

- Group [G]

This function allows you to assign all "checked" [✓] activities to a single activity group. The groups must have been defined in the Activity Group function of the List Maintenance choice on the Main Menu before selecting this function. (See Section 9.2.)

After selection, a list of your Activity Groups is displayed in a dialogue box (Figure 7-12), and you can choose the group to which the "checked" activities will be assigned. Once you have highlighted the desired group, activate the "Add To" [A] action button, and the assignment will be made. The "Cancel" [C] button returns you to the "Retrieved Activities" (Figure 7-5) screen, with no group assignment made.

- Viewers [V]

This function allows you to go through the "checked" [✓] activities for which you are the originator and attach viewing lists. Selecting this command brings up a submenu (Figure 7-13) that provides three options.

- The first of these, "Individually" [I], will present you with a discrete "Enabled Viewers" form (Figure 7-14) for each

"checked" [✓] activity that uniquely identifies the presented activity by title, agent name, and due date. The form shows, in two windows, "Enabled Viewers"--those individuals who already have, or will have, viewing access to the activity at the end of this operation, and "User Lists"--a list of the User Lists that you have created plus a "list" for each individual system user.

Three commands are available in the menu bar of this command:

1. Attach List [A]

This command "attaches" each list "selected" by the current cursor position to the specified activity. The names from each list are moved to the "Enabled Viewer" list, in alphabetical order, and a "check mark" [✓] is placed in front of the attached list. (If any lists had previously been attached to the activity, they too would have been denoted by a "check mark.") Any duplicate names are dropped.

2. Detach List [D]

This command works the opposite of the "Attach List" command. It removes the selected list and the names associated with that list.

3. Exit [X]

Selecting this command returns you, immediately, to the "Retrieved Activities" (Figure 7-5) form and ends the viewing list assignment function.

- The second of these, "Group" [G], will present you with a single "Enabled Viewers" form (Figure 7-15) that will effect all the "checked" [✓] activities. Instead of identifying each activity, the form specifies that it applies to all selected activities. This variation functions exactly the same as the individual option, above.
- The third option, "Report" [R], brings up a dialogue box (Figure 7-15) that is used to print a report showing the assigned viewers of each "checked" [✓] activity. To print the report, select "Report" from the submenu and activate the "Report" [R] action button. To return to the Retrieved Activities screen without printing the report, activate the "Cancel" [C] action button.
- Close [7]

This function sets the status of all "checked" activities to closed. If the activity status is not "accepted," the agent data (if any) will be cleared.

- Reopen [O]

This function will set the status of all "checked," closed activities to "accepted" (open) if there is an agent. If the closed activity does not have an agent, the status will be set to "unassigned" (open).

(The significance of this feature is that an activity that has an agent assigned, but unaccepted, will lose the agent data if it is closed and reopened.)

7.9.2 Sort [S]

This selection is used to sort the activities listed on the "Retrieved Activities" screen by the contents of one of the fields in the list. When this menu item is selected, a submenu (Figure 7-16) presents the available sort choices. These are as follows:

- by Title [T]
- by Status [S]
- by Originator [O]
- by Agent [A]
- by Due Date [D].

Select any of these to reorder the list as desired or press F10 to return to the "Retrieved Activities" screen.

7.9.3 Check [C]

Selecting this function will bring up a submenu (Figure 7-17) with the choices "Current" [C] and "All" [A]. Selecting "Current" will insert a "check mark" [✓] next to the activity currently highlighted. Selecting "All" will "check" [✓] all listed activities.

An alternate means of "checking" an activity for mouse users is to double-click the desired activity with the left mouse button.

7.9.4 Uncheck [U]

Selecting "Uncheck" opens a submenu (identical to the "Check" submenu) that provides two choices: "Current" [C] or "All" [A]. The "Current" command unchecks the activity highlighted. "All" unchecks all listed activities.

The mouse may be used for unchecking an individual activity by double clicking with the right mouse button.

7.9.5 Reselect [R]

The "Reselect" [R] command returns you to the retrieval screen that was used to select the information.

7.9.6 Exit [X]

Selecting "Exit" [X] returns you to the Main Screen.

Figure 7-1. Retrieve Activity Submenu.

Figure 7-2. Retrieve by Activity Group Dialogue Box.

Retrieve by Activity Role

- ☐ Originator
- ☐ Agent
- ☐ Personal Data
- ☐ Viewing List

☐ Include Closed Activities

Ok Cancel

Figure 7-3. Retrieve by Role Dialogue Box.

Retrieve by Pattern Matching

AMS User Names: [Search Box]

User Lists: [Scrollable Area]

Originator: [Any User] [Name] [Initial] [Any User]

Agent: [Any User] [Name] [Initial] [Any User]

Other Search Fields:

- Activity ID: [Text Box]
- Title: [Text Box]
- Due Date: [Text Box]
- Status Date: [Text Box]
- Priority: [Text Box]

☐ Include Closed Activities

Ok Find Cancel

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Figure 7-4. Retrieve by Pattern Matching Form.

# Functions Sort Check Uncheck Reselect Exit					
Retrieved Activities					
File	Validation	Status	Originator	Agent	Due Date
Sample #3			w Gates, Theodore	Burdick, Mike B	6/01/94
Sample For HMS User Manual			n Gates, Theodore	Not Assigned	6/01/94
* 					

Figure 7-5. Retrieved Activities Screen.

Retrieve by Validation Status

Originator Role

- ☐ Unrelated
- ☐ Refused
- ☐ Unassigned
- ☐ Accepted
- ☐ Closed

OK Cancel

Figure 7-6. Retrieve by Validation Status Dialogue Box.

Figure 7-7. Retrieve Completed Activities Dialogue Box.

Figure 7-8. Retrieve Delinquent Activities Dialogue Box.

Figure 7-9. Retrieve by Prerequisite List Dialogue Box.

Figure 7-10. Retrieve by Category Dialogue Box.

Figure 7-11. Retrieved Activities Functions Submenu.

Figure 7-12. Add Activity to Group Dialogue Box.

Figure 7-14. Enable Viewers Form.

Figure 7-13. Activity Viewers Submenu.

Figure 7-15. Enabled Viewers Report Dialogue Box.

Figure 7-16. Retrieved Activities Sort Submenu.

Figure 7-17. Retrieved Activities Check Submenu.

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8.0 MODIFYING ACTIVITY DATA (EDIT)

When the "Edit" function is selected from the "Retrieved Activity" form (Figure 7-5), a data entry form is opened that displays the data, one activity at a time, for each activity that was checked.

NOTE: Edit will only display checked activities on which you are either the originator or the agent.

The form is the same as the one used for the "Create Activity" function (Figure 6-1). The specific title and the fields that the user is permitted to modify vary depending on several factors, including the user's status (originator or agent) and the validation status of the activity (accepted, unaccepted, rejected, etc.).

If you are the originator, you may change data in every field except the originator, ID, validation status, and completed date fields. The fields you are permitted to change are displayed in blue. Once the activity has been validated, the original date cannot be changed without clearing the agent.

If you are the agent, you may modify only the data in the completion date field and the status data memo field. These fields are displayed in blue.

If this is a personal item, where you are originator and agent, you may change any data except the original date, originator, validation status, and ID. NOTE: If you change the agent (changing this to a non-personal item), you will not be able to change the completion date once the new agent has validated the activity.

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9.0 LIST MAINTENANCE

The "Lists" function supports the tasks involved in creating and maintaining the three types of lists that AMS supports: User Lists, Activity Group Lists, and Mail Lists.

9.1 USER LISTS

The User Lists function provides for grouping users into sets, for use in either or both of two different AMS functions.

The first use of User Lists is as "viewing lists" to allow any AMS users who have been defined as members of the list to view any validated activities to which that list has been "attached" (see Section 7.9.1). This "viewing list" capability permits other AMS users who may be project members, team members, management, etc., to look at specified activities.

The second, entirely different use for AMS User Lists is used in the "Retrieve by Match" function. User Lists may be specified in place of individual users in two of the match fields: Originator and Agent. Specifying a list instead of an individual name expands the scope of the search to all members of the list. Thus, sets of activities can be retrieved. Examples may include the set of all activities where you are the originator and any member of a specified user list is the agent. Or, vice versa, the set of all activities where any of the users on the list is the originator and you are the agent.

It should be noted that, unlike activity groups, this second use of User Lists provides a dynamic grouping capability. That is, any new activities by users in the list will be retrieved automatically (if you are agent, viewer, or originator) by the retrieve by match query as long as any other match criteria are satisfied. Thus, it is not necessary to add new activities to the resulting set explicitly as is required by the Activity Group function.

User lists are created using the "User List" function under the "Lists" command on the Main Menu.

9.1.1 To Define a New User List

1. Select the "Lists" [L] command in the Main Menu (see Figure 4-1).
2. Select the "User List" [U] command from the subsequent pull-down menu (see Figure 4-3). This choice will result in a "User List Maintenance" screen (Figure 9-1) being opened. This screen consists of four dialogue boxes, located in the four quadrants of the form; one of these consists only of four action buttons.

The first dialogue box, titled "User Lists," located in the lower right quadrant, shows the names of any lists you have already defined.

The second dialogue box, located in the upper left quadrant and titled "User List Names," displays information about the list currently being operated on. The name of the list appears in a text box titled "List," followed by the names that are assigned to that list.

The third dialogue box, in the lower left quadrant, is a window used to retrieve AMS user names from the AMS user table. This dialogue box contains a text box titled "Retrieved Names," into which can be typed an AMS User Name, or the first few characters of a name. When the "Search" [S] action button is selected, any names matched by the characters or name entered will be listed in the box below.

The fourth quadrant contains only action buttons. Three of these control actions in the first quadrant, the "User List." These are the "Add Name" [D], "Clear" [C], "Save" [S], and "Exit" [X] buttons described below.

3. Name the list to be created.

3.a If the "User List Names" dialogue box, and "List" name text box are empty (they should be), skip to 3.b. Otherwise, activate the "Clear" [C] button to the right. This will clear the dialogue box so that a new list name and set of user names can be entered.

3.b Enter the name to be used for identifying the new User List in the "List" text box.

4. Populate the list

4.a You may add AMS user names to the new list by either or both of two methods.

First, you may select (highlight) the name of an existing list from the "User Lists" window in the lower right quadrant and activate the "Append" [P] action button under that window. This will move all the names associated with the selected list to the "Current User List Names" window. You may append the names from as many existing user lists as you desire. The AMS will eliminate any duplicates.

You may use the "Del Name" [E] action button to the right of the "Current User List Names" window to delete any names you do not wish to retain in the new list.

4.b You also may select names from the list of all AMS users by entering as many characters as you desire in the "Retrieved Names" search text box and activating the "Search" [S] action button. All names beginning with the same characters as those entered in the text box will be listed in the window below this box. You may then select (highlight) any of these and use the "Add Name" [A] action button to move the highlighted name to

the "Current User List Names" box. This technique may be used to add as many individual user names to the new list as you require.

Both of these methods can be employed to extract names from previously defined lists and combine them with names from the AMS master user list to build a new list.

5. When the new list has been named and all desired names have been inserted, activate the "Save" [V] action button in the upper right quadrant to permanently store the list so that it can be used.
6. To terminate the "User List Maintenance" function, activate the "Exit" [X] action button. You will be placed back in the "Lists" menu.

9.1.2 To Modify Existing User Lists

1. Select the "Lists" [L] command in the Main Menu bar.
2. Select the "User List" [U] command from the subsequent pull-down menu. This will result in a "User List Maintenance" form being opened (Figure 9-1).
3. Select (highlight) the name of the list you desire to change in the "User Lists" window and activate the "Open" [O] action button beneath this window. This will cause the name of the "opened" list to be moved to the "Name" text box of the "User List Names" window, and the names currently assigned to the list will be displayed beneath the name. You can then add and delete names as described in Section 9.1.1, Item 4.
4. When the list has been changed as desired, activate the "Save" [V] action button to make the changes permanent.
5. Select the "Exit" [X] to exit the "User List Maintenance" functions if you have finished.

9.1.3 To Delete a User List

1. Select the "Lists" [L] command in the Main Menu bar.
2. Select the "User List" [U] command from the subsequent pull-down menu. This will result in a "User List Maintenance" form being opened (Figure 9-1).
3. Select (highlight) the list you desire to delete in the "User Lists" window and activate the "Delete" [D] action button beneath this window. The deleted user list name will be removed from the "User List" window.

- 3.a If you have previously opened the list you deleted so that it is displayed in the "User List Names" window, the list name and data will still be displayed in that window after the delete operation. In fact, you can activate the "Save" [V] action button and recreate the list.
- 3.b If the deleted list was not opened, it will not be displayed in the "User List Names" window as described above.
4. When the lists to be deleted have all been removed, activate the "Save" [V] action button to make the changes permanent.
5. Select the "Exit" [X] to exit the "User List Maintenance" functions if you have finished.

9.2 ACTIVITY GROUPS

This feature allows activities to be grouped into sets. Activity Groups can be assembled for any purpose. They are useful for retrieving, with a single operation, specified sets of activities for reporting, updating, etc.

Activity Group functions are accessed through forms with the same general appearance as those used for the User List and Mail List functions. This common design was selected to reduce the learning curve for these operations.

The population of a group remains fixed once the activities have been assigned and only changes automatically when items are completed. Activities can be deleted or additional activities can be assigned manually by performing the appropriate function (see Sections 7.9.1 and 9.2.2).

9.2.1 To Define New Activity Groups

1. Select the "Lists" [L] command in the Main Menu bar (see Figure 4-1).
2. Select the "Activity Groups" [A] command from the subsequent pull-down menu (see Figure 4-3). This will result in an "Activity Group Maintenance" form being opened (Figure 9-2). This form consists of four dialogue boxes, located in four quadrants of the form. One of these contains only four action buttons.

The first dialogue box, titled "Activity Groups" [G], located in the lower right quadrant lists the names of any activity groups you have already defined.

The second dialogue box, titled "Group Activities" [G], in the upper left quadrant, displays information about the group currently being operated on. It shows the name of the group in a text box titled "Group" [U] and is followed by a list of the names that have been assigned to that group.

Finally, in the lower left quadrant, is a window used to retrieve AMS activities by title from the AMS database. This dialogue box contains a text box titled "Activities," into which can be typed an activity title, or the first few characters of an activity. When the "Search" [S] action button is selected, any activity titles matched by the characters or name entered will be listed in the box below.

The fourth quadrant contains only action buttons. The control actions in the first quadrant ("Group Activities") are the "Add Act" [D], "Clear" [C], "Save" [S], and "Exit" [X] buttons, described below.

3. Name the group

3.a If the "Group Activities" box, or group name in that dialogue box is empty (it should be), skip to 3.b. Otherwise, activate the "Clear" [C] button. This will clear any existing information out of the box.

3.b Enter the name of the new group in the "Group" text box.

4. Populate the group

4.a You may add activity names to the new group by either or both of two methods. First, you may select the name of one of the existing groups from the "Activity Groups" window in the lower right quadrant and activate the "Append" [P] action button under that window.

This action will move all the activity names already defined in the selected list to the "Group Activities" window. You may append the names from as many existing activity groups as you desire. The AMS will eliminate any duplicates. You may use the "Del Act" [E] action button to the right of the "Group Activities" window to eliminate any activity names you do not wish to retain in the new list.

4.b You also may select any names from the list of all AMS activities by entering as many characters as you desire in the "Activities" search text box and activating the "Search" [S] action button. Any activity names that begin with the same characters as those entered will be listed in the window below this box. You may then select any of these and use the "Add Act" [A] action button to move the highlighted name to the "Group Activities." You may select as many individual activity names as you like with this technique.

You may combine these two methods to extract names from previously defined groups and combine them with names from the AMS activity table to build a new list.

5. When the new group has been named and all desired activity names have been inserted, activate the "Save" [S] action button in the upper right quadrant to permanently store the group so that it can be used.
6. To leave the "Activity Groups" function, activate the "Exit" [X] action button.

9.2.2 To Modify Existing Activity Groups

1. Select the "Lists" [L] command in the Main Menu bar.
2. Select the "Activity Groups" [A] command from the subsequent pull-down menu. This will result in a "Activity Group Maintenance" form (Figure 9-2) being opened.
3. Select (highlight) the group you desire to change in the "Activity Group" window and activate the "Open" [O] action button beneath this window. This will cause the name of the "opened" group to be moved to the "Group" text box of the "Group Activities" window, and the names in the list will be listed beneath the name. You can then add and delete names as described in Section 9.2.1, Item 4.
4. When the list has been changed as desired, activate the "Save" [S] action button to make the changes permanent.
5. Select the "Exit" [X] to exit the "Activity Groups" functions if you have finished.

9.2.3 To Delete an Activity Group

1. Select the "Lists" [L] command in the Main Menu bar.
2. Select the "Activity Groups" [A] command from the subsequent pull-down menu. This will result in a "Activity Group Maintenance" form (Figure 9-2) being opened.
3. Select (highlight) the group you desire to delete in the "Activity Groups" window and activate the "Delete" [D] action button beneath this window. The deleted group name will be removed from the "Activity Groups" window.
 - 3.a If you have previously opened the group you deleted so that it is displayed in the "Group Activities" window, the group name and data will still be displayed in that window after the delete operation. In fact, you can activate the "Save" [S] action button and recreate the group.
 - 3.b If the deleted group was not opened, it will not be displayed in the "Group Activities" window as described above.

4. When the groups to be deleted have all been removed, activate the "Save" [V] action button to make the changes permanent.
5. Select the "Exit" [X] to exit the "User List Maintenance" functions if you have finished.

9.3 MAIL LISTS

Mail Lists are lists of cc:Mail subscribers who can be defined by AMS users. These lists can be used for sending reports and extracts of activities to anyone with cc:Mail access, even if they are not a registered AMS user.

The Mail List functions are accessed through the same form layout as those used for the User List and Activity Group functions. This reduces the learning curve for these operations.

9.3.1 To Define New Mail Lists Groups

1. Select the "Lists" [L] command in the Main Menu bar.
2. Select the "Mail Lists" [A] command from the subsequent pull-down menu. This will result in an "Activity Group Maintenance" form being opened. This form (Figure 9-3) consists of four dialogue boxes, located in the four quadrants of the form. One of these consists only of four action buttons.

The first dialogue box, called "CCmail Mailing Lists," is located in the lower right quadrant and lists the names of any Mail Lists you have already defined.

The second dialogue box, in the upper left quadrant, is called "Mail List Names," and displays information about the Mail List currently being operated on. It shows the name of the Mail List in a text field titled "List," followed by a list of the names that have been included in that Mail List.

Finally, in the lower left quadrant is a text field into which can be typed a name, or the first part of a name to be searched in the sitewide cc:Mail User List. The list of names that follows shows any cc:Mail subscriber names that have been retrieved by a search.

3. Name the cc:Mail List
 - 3.a If the "Mail List Names" box, or "List" name in that dialogue box is empty (it should be), skip to 3.b. Otherwise, activate the "New List" [N] button. This will clear any existing information out of the box.
 - 3.b Enter the name of the new cc:Mail List in the "List" text box.

4. Populate the List

- 4.a You may add subscriber names to the new cc:Mail List by either or both of two methods. First; you may select the name of one of the existing CCmail Lists from the "cc:Mail Mailing Lists" window in the lower right quadrant and activate the "Append" [P] action button under that window.

This action will move all the subscriber names already defined in the selected list to the "Mail List Names" window. You may append the names from as many existing cc:Mail Lists as you desire. The AMS will eliminate any duplicates. You may use the "Del Name" [E] action button to the right of the "Mail List Names" window to drop any subscriber names you do not wish to retain in the new cc:Mail List.

- 4.b You also may select any names from the list of all cc:Mail subscribers by entering as many characters as you desire in the "Retrieved CCmail Names" search text box and activating the "Search" [S] action button. Any cc:Mail Subscriber Names that begin with the same characters as those entered will be listed in the window below this box. You may then select (highlight) any of these and use the "Add Name" [A] action button to move the highlighted name to the "Mail List Names" box. You may select as many individual subscriber names as you like with this technique.

You may combine these two methods to extract names from previously defined cc:Mail Lists and combine them with names from the cc:Mail subscriber list to build a new list.

5. When the new list has been named and all desired subscriber names have been inserted, activate the "Save" [V] action button in the upper right quadrant to permanently store the new cc:Mail List so that it can be used.
6. To leave the "Mail List Maintenance" function, activate the "Exit" [X] action button.

9.3.2 To Modify Existing Mail Lists

1. Select the "Lists" [L] command in the Main Menu bar.
2. Select the "Mail Lists" [A] command from the subsequent pull-down menu. This will result in a "Mail List Maintenance" form (Figure 9-3) being opened.
3. Select (highlight) the existing cc:Mail List name you desire to change in the "CCmail Mailing Lists" window and activate the "Open" [O] action button beneath this window. This will cause the name of the "opened" list to be moved to the "List" text box of the "Mail

List Names" window, and the names in the list to be listed beneath the name. You can then add and delete subscriber names as described in Section 9.2.1, Item 4.

4. When the cc:Mail List has been changed as desired, activate the "Save List" [V] action button to make the changes permanent.
5. Select the "Exit" [X] to exit the "Mail Lists" functions if you have finished.

9.3.3 To Delete a Mail List

1. Select the "Lists" [L] command in the Main Menu bar.
2. Select the "Mail Lists" [A] command from the subsequent pull-down menu. This will result in a "Mail List Maintenance" form (Figure 9-3) being opened.
3. Select (highlight) the list you desire to delete in the "CCmail Mailing List" window and activate the "Delete" [D] action button beneath this window. The deleted group name will be removed from the "CCMail Mailing Lists" window.
 - 3.a If you have previously opened the group you deleted so that it is displayed in the "Mail List Names" window, the List name and data will still be displayed in that window after the delete operation. In fact, you can activate the "Save List" [V] action button and recreate the list.
 - 3.b If the deleted cc:Mail List was not opened, it will not be displayed in the "Mail List Names" window as described above.
4. When the lists to be deleted have all been removed, activate the "Save" [V] action button to make the changes permanent.
5. Select the "Exit" [X] to exit the "User List Maintenance" functions if you have finished.

User List Maintenance

User List Names

List: AMS VIEW

Burdick, Brian E

Carallo, Kimberly J (Kim)

Halsey, Thomas G (Tom)

Retrieved Names

Search

Burdick, Brian E

User Lists

AMS VIEW

USERMAN

Append Open Delete

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Figure 9-1. User List Maintenance Form.

Activity Group Maintenance

Group Activities

Group: Sample for AMS User Manual

Activities

Search

Sample for AMS User Manual

Activity Groups

AMS SDP

CPSP

MIS SDP

Plant SMP

PD SMP

Risk Assess

Append Open Delete

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Figure 9-2. Activity Group Maintenance Form.

Mail List Maintenance

Mail List Names

List : Userman

Murdick, Mike B

Rosnick, C K (Chuck)

Get Saved Email Names

Rosnick

Sin

Rosnick, C K (Chuck)

Get Email

Close

Save List

Email Mailin Lists

Get Email

Open

Close

Print

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Figure 9-3. Mail List Maintenance Form.

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10.0 VALIDATE COMMAND

"Validation" is the term used for the AMS process whereby a person requested to be the agent for an activity indicates acceptance or rejection of that request. The AMS users are notified of an agent request in two ways.

- First, a cc:Mail message is automatically mailed to the requested agent by the AMS announcing the request.
- Second, when proposed agents log into the AMS application, a message informs them of the number of unvalidated activities they may have in the database. (They are also told if no unvalidated activities are found.)

To validate one or more activities:

1. Select the "Activity" [A] command from the Main Menu bar. This brings up the Activity pull-down menu (Figure 4-2).
2. Select the "Validate" command from the pull-down menu. This brings up a submenu (Figure 10-1) with two selections: "Validate" [V] and "Report" [R]. Select the "Validate" command. This activates a search for unvalidated activities and presents them to you, one at a time, on a "Validation Form" (another variation of the data entry form (Figures 6-1 and 10-2).

You will be able to look at all the data in the Activity record, but will be unable to enter or change any data except for the "Status" memo field which is used to send any message back to the originator.

3. Select one of the options from the "Options" command from the "Validation Form" menu bar. This opens a submenu (Figure 10-3). The choices are: "Accept" [A], "Refuse" [R], or "DoNothing" [D] (to leave the activity status as is until you come back to it). The choices are self-evident. If you select "Refuse," you will be removed from the activity and the originator will be notified via cc:Mail.
4. Choose "Next" [N] to perform the type of validation selected and look at the next activity, if there is more than one.
5. OR, choose "Exit" [X] to perform the selected validation activity and exit to the main screen without viewing additional activities.

To print a report of the unvalidated activities (in order to see all of them at once), choose the "Report" command. This results in a dialogue box (Figure 10-4) that allows you to specify the printer to be used. After selecting a printer, activate the "OK" [O] button to print the report or the "Cancel" [C] button to abandon the operation.

Figure 10-1. Validate Activities Submenu.

Options	ViewMenu	Previous	Next	Exit
Validation Form				
Title: Sample For User Manual		ID:	807	
Originator: Gates, Theodore A Jr		Priority:		
Agent: Rordick, Mike D		Ref. Doc:		
Prereq Code: 2 ISSUE SDHD				
Category: 1000-19-01		REGFHOCH		
Due Date:				
Original: 10/20/94		Adjusted: 10/20/94	Completed:	
Description: No description entered				
Status: No status entered				
Deliverable: No deliverable entered				
Validation status: Waiting Validation				

Figure 10-2. Activity Validation Form.

Figure 10-3. Validation Options Submenu.

Figure 10-4. Unvalidated Activity Report Dialogue Box.

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11.0 REPORTS

The AMS user reports are created by selecting the "Functions" [F] command in the "Retrieved Activities Form" menu bar (Section 7.5 and Figure 7-8) and choosing the "Report & View" [R] selection from the resulting submenu (Figure 7-11). This will bring up the "Activity Reports" dialogue box (Figure 11-1). The "Report & View" function acts on the entire set of activities that have been "checked" [✓] previously on the "Retrieved Activities" form. Two main options are available for output:

- The reports can be displayed, one at a time, on the screen. A separate action must be taken for each report.
- The reports can be sent to the local or network line printer, to a file, or to a cc:Mail address. In this instance, all items will be processed by a single command.

All controls for the "Report & View" function are located in the "Activity Reports" dialogue box (Figure 11-1). There are four sets of radio buttons.

- The first set is used to select the type of report to be created: "Full" [U], "Summary" [Y], "Brief Landscape" [B], or "Brief Portrait" [E] (see the Appendix for samples).

NOTE: The "Brief Landscape" option will not be valid if you attempt to display the report to the screen.

- The second set of buttons allows a choice of sort sequence by "Title," "Due Date," or "Agent."
- The third set of buttons allows for selection of the output destination: "LPT1" [1], "LPT2" [2], "LPT3" [3], "CCmail [I], or "File [F].
- The final set of buttons specifies the size of the report, either "Letter" [L] or (pocket) "Planner" [A].

A text field is available for keying in a comment to be added to the report.

Finally, four push buttons to initiate the action are located across the bottom of the screen. These are as follows:

- "Report" [R], to send the data to the selected printer, file, or cc:Mail
- "Screen" [S] to display the reports on the user's PC screen
- "MainMenu" [M] to return to that screen
- "Cancel" [C] to return to the "Retrieved Activities" screen.

11.1 DISPLAYING REPORTS ON THE SCREEN

1. Select the type of report format desired: "Full," "Summary," or "Brief Portrait" (vertical orientation) (Figure 11-1).
2. Select the sort order desired.
3. Select the destination (see Section 11.3 for special instructions if this choice is to be written to a file or Section 11.4 if it is to be sent via cc:Mail).
4. Select the desired paper size (used only if the "print" option is selected (see Step 8, below).
5. Activate the "Screen" [S] action button to display the first report on a "View Activities" screen (Figure 11-2).
6. Additional "checked" [✓] reports (if any) can be viewed by selecting the "Next" [N] command from the menu bar. When you have reached the bottom of the list, you will get a "beep" if you select "Next" again.
7. You can "back up" to reports previously viewed by selecting the "Previous" [P] command from the menu bar. When you reach the first report, the "Previous" command will have no effect except for a "beep."
8. At any point, while you are in the "View Activities" screen (Figure 11-2), you can print the on-screen activity or all the selected activities. Simply choose the "Print" [N] item from the menu bar. You will be presented with a submenu with two choices: "All" [A] or "Current" [C]. After the print request is finished, you will return to the "View Activities" screen.
 - 8.a If you have chosen File as the destination for the report(s), you will be asked to name the file. See Section 11.3 for additional instructions.
 - 8.b If you have chosen cc:Mail as the destination, you will be asked to select the cc:Mail addressees. See Section 11.4 for additional instructions.
9. You can select "Report Options" [R] from the menu bar to return to the "Activity Reports" (Figure 11-1) dialogue box to change the report options at any time you have the "View Activities" (Figure 11-2) screen displayed.
10. Selecting the "Exit" [X] command from the menu bar will terminate the report process and return you to the "Retrieved Activities" screen (Figure 7-5). This will allow you to change the "checked" [✓] that will be reported on, choose other menu functions, such as "Clone" or "Edit," or "Exit" the retrieval process. No reports will be printed, mailed, or written to a file.

11.2 PRINTING REPORTS DIRECTLY

1. Select the type of report format desired: "Full," "Summary," "Brief Landscape" (horizontal paper orientation), or "Brief Portrait" (vertical paper orientation) (Figure 11-1).
2. Select the sort order desired.
3. Select the destination (see Section 11.3 for special instructions if this choice is to be written to a file or Section 11.4 if it is to be sent via cc:Mail).
4. Select the desired paper size.
5. Activate the "Report" [R] action button to send all the "checked" [✓] activities, in the format chosen, to the specified destination (printer, cc:Mail, or file). At the end of this operation, the application returns you to the "Activity Reports" screen (Figure 11-1). This allows you to select a different report format or destination for the same list of activities.
 - 5.a If you have chosen File as the destination for the report(s), you will be asked to name the file. See Section 11.3 for additional instructions.
 - 5.b If you have chosen cc:Mail as the destination, you will be asked to select the cc:Mail addressees. See Section 11.4 for additional instructions.
6. To terminate the report function and return to the "Retrieved Activities" screen (Figure 7-5), activate the "Cancel" [C] action button. This will enable you to "check" other activities and perform other operations.
7. To terminate the Report & View function and return to the AMS Main Menu screen (Figure 4-1), select the "Main Menu" [M] function on the menu bar.

11.3 WRITE REPORTS TO A DOS ASCII FILE

This feature allows you to generate the AMS reports in any of the provided formats (except the "planner" paper size) and direct the output to an ASCII file rather than to the printer or screen. This capability is activated indirectly by selecting "File" [F] in the "Destination" [D] radio buttons on the "Activity Reports" screen. Once one of the two commands that initiates report output has been executed--"Report" [R] on the "Activity Reports" dialogue box (Figure 11-1) or "Print" [N] on the "View Activities" form (Figure 11-2)--the data will be written to the specified file.

1. If the action originates from the "Report" action button, AMS will open a dialogue box (Figure 11-3) titled "Write to File." This is used to collect the DOS file string that will be used to store the file.

- 1.a Once the file string (disk, directories, and file) has been entered, the "WriteFile" [W] action button is used to write the data and return to the "Retrieved Activities" screen (Figure 7-5). If no disk or directory is specified, the file will be written to the directory "WPDATA" on your "C:" drive.
- 1.b Activating the "Cancel" [C] action button on the "Write to File" dialogue box terminates the function and returns you to the "Retrieved Activities" screen.
2. If the action originates from the "Print" [N] command in the "View Activities" screen menu bar (Figure 11-2), the process will function the same as above except that you will return to the "View Activities" screen after the file has been written.

11.4 MAIL REPORTS VIA CC:MAIL

This feature allows you to generate reports and mail them, via cc:Mail, to any cc:Mail subscribers, whether or not they are also AMS users. This capability is activated by selecting "CCmail" [I] in the "Destination" [D] radio buttons on the "Activity Reports" dialogue box (Figure 11-1). Once one of the two commands that initiates report output has been executed--"Report" [R] on the "Activity Reports" dialogue box or "Print" [N] on the "View Activities" form (Figure 11-2)--the reports will be mailed to the selected addressees.

Whichever command is used to start the mail process, AMS will open a dialogue box (Figure 11-4) titled "CCmail Addresser." This box is used to select one or more addressees to receive the mailed reports, give the mail message a cc:Mail subject, and specify whether a receipt is requested. Once the "CCmail Addresser" dialogue box is open, the following steps occur.

1. The list of cc:Mail subscribers is searched for the desired addressee(s) by entering at least the first three characters of the last name into the "Name" [N] field and activating the "Search" [S] action button. All matching names will be returned to the "Retrieved Names" list. The desired name is then highlighted and the "Add Name" [A] action button is activated to move the name to the list titled "CCmail Addressees" [M]. This is the list to whom the reports will actually be sent. To remove a name from the "CCmail Addressees" list, select the name and execute the "Del Name" [D] command.
2. To facilitate mailing reports to the same group of addressees on a repeating basis, the lists shown in the "Mail Lists" [L] can be used to specify groups of cc:Mail subscribers as addressees. All lists you have previously defined (see Section 9.3) will be shown in the "Mail Lists" area of the screen. Highlight the list you desire and activate the "Add Mail List" [I] action button. The names from that list will be added to the list of "CCmail Addressees." You may add as many lists as desired.

3. Once the addressees have been selected, an appropriate subject should be entered into the "Subject" field, as this is what will appear in cc:Mail when the addressee checks for new mail.
4. If a receipt is desired from cc:Mail, the "Receipt Requested" check box should be accessed to turn on the "X."
5. At this point, the "OK" [O] button at the bottom of the screen should be activated to proceed with the mail function.
 - 5a. If you started the cc:Mail function by pressing the "Report" [R] button on the "Activity Reports" dialogue box, the reports will be generated and mailed to the addressees and you will be returned to the "Retrieved Activities" screen (Figure 7-5).
 - 5b. If you started the cc:Mail function by pressing the "Print" [N] button on the "View Activities" screen (Figure 11-2), the reports will be mailed and you will be returned to the "View Activities" screen. Remember that no reports will be mailed until you select the "Print" command from the "Activities" screen.
6. Activating the "Cancel" [C] action button terminates the cc:Mail function with no reports mailed and returns you to the originating screen as described above.

Activity Reports

Source (<*) N 11 (<*) Summary (<*) Brief Landscape (<*) Brief Portrait	Destination (<*) LPT (<*) LPT (<*) LPT (<*) GCma 1 (<*) File
Sort Order (<*) Title (<*) Due Date (<*) Agent	Paper Size (<*) Letter (<*) Planner

Report Comment

Report Summary Brief Landscape Brief Portrait

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Figure 11-1. Activity Reports Dialogue Box.

Print ViewMemo Previous Next Report Options Exit

View Activities

Title: Sample For User Manual	ID: 807
Originator: Gates, Theodore R Jr	Priority:
Agent: Burdick, Mike B	Ref. Port:
Parag Code: 2 18808 GPRD	Del. Status:
Category: 18808-19-03	RESTROOMS
Original: 04/05/94	Adjusted: 04/05/94
Due Date:	Completed:

Description: No description entered

Status: No status entered

Deliverable: No deliverable entered

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Figure 11-2. View Activities Screen.

Figure 11-3. Write to File Dialogue Box.

Figure 11-4. cc:Mail Addresser Screen.

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12.0 REFERENCES

Gates, T. A., 1994, *Small Job Development Software Project Documentation for the Activity Management System*, WHC-SD-HWV-SDP-004, Rev. 1, Westinghouse Hanford Company, Richland, Washington.

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13.0 GLOSSARY

ACRONYMS

ASCII	American Standard Code for Information Interchange
AMS	Activity Management System
CPPM	Computer Protection Program Manager
CTS	Commitment Tracking System
DAC	Data Administration Council
DOE	U.S. Department of Energy
HLAN	Hanford Local Area Network
HWVP	Hanford Waste Vitrification Plant
ID	identification
LAN	Local Area Network
WCT	Westinghouse Correspondence Tracking
WHC	Westinghouse Hanford Company

GLOSSARY

Activity. A single event, action item, occurrence, deliverable, etc. that has been entered into the AMS database (see "Commitment").

Activity group. A set of activities that is defined by an AMS user for the purpose of grouping selected activities so that they may be acted upon by single commands.

Agent. The individual who will perform the action, work, task, etc., necessary to complete the requirements of an activity. This term was selected because it can be considered that the "agent" is acting at the request and on behalf of the originator.

Commitment. An accepted activity calling for performance of some action to be performed by an agent on behalf of the originator. (The agent may be the originator.)

Originator. The person responsible for an activity that has been entered into AMS* (i.e., the "owner" of the activity).

Personal item. An activity where the agent is the originator.

*Use of the term "originator" should not be interpreted to mean that this is necessarily the individual who first created the need for an activity being inserted into the AMS. In AMS, the "originator" is that AMS user who wants to incorporate a description of the activity in the database (and will be interested in its resolution). It will be possible for an individual to be identified in the database as the "originator" of an activity even though someone else performs the actual work of entering the data into the computer.

User list. Every AMS user can create one or more lists of other AMS users. These lists are used for several system functions. One such use is to specify "viewing lists" (see below). Another is to specify lists of originators or agents for retrievals.

Viewer. An AMS user authorized viewing access to specific activities or commitments. This access is allowed for viewing only and no modification to the item retrieved is possible.

Viewing list. One or more user lists that have, optionally, been "attached" to an activity or commitment. This is the mechanism by which AMS users, other than the originator or agent, are identified as having read-only access to an activity or commitment.

APPENDIX

USING THE ACTIVITY MANAGEMENT SYSTEM

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APPENDIX

USING THE ACTIVITY MANAGEMENT SYSTEM

A.1 THE ACTIVITY MANAGEMENT SYSTEM (AMS) SCREEN

Each time you start AMS, you see the following:

- The Main Menu in the *menu bar* at the top of the screen
- The *Message Bar* at the bottom of the screen
- The *desktop* in between the menu bar and the Message Bar.

Figure 4-1 in Section 4.0 shows the AMS screen.

A.1.1 The Hot Keys

One function key, F10, is implemented in AMS. The F10 key moves the cursor to the menu bar and permits selection of menu choices from the keyboard.

NOTE: Once in the menu bar, and also in pull-down menus, commands may be selected by pressing a single key, represented by a highlighted letter of contrasting color. (There are similar "hot keys" in dialogue boxes, but you must press the *Alt* key and the "hot key" together to activate them.) "Hot keys" are shown in the text portions of this manual as italicized characters within brackets, e.g., "[C]". "Hot keys" are not case sensitive--that is, upper or lower case letters are interpreted the same.

A.1.2 Messages

Status messages will appear at the bottom right of the Desktop. The message about unvalidated activities at login is an example of such messages. Other messages appear in windows that pop open on the Desktop.

A.1.3 Message Bar

A brief text description of the current menu selection appears in the message bar at the bottom of the screen. This text changes as you move the cursor around the screen.

A.1.4 Dimmed Screen Items

A menu selection, or other screen selection item that is dimmed, means that you are unable to execute that item. In the case of the Admin selection on the main menu, only the AMS administrator will have this selection in

normal brightness and be able to choose that menu. Other selections will be dimmed because of your role on the activity to show functions that you may not perform.

A.1.5 Color Changes

The AMS uses colors to highlight various items on the screen. For instance, the fields that you are not able to modify on the data entry form are colored magenta and names in lists are highlighted by means of a colored bar.

A.2 USE OF THE KEYBOARD AND THE MOUSE

The AMS recognizes movement and inputs from the mouse, making interaction with the pull-down menus, dialogue boxes, and windows fast and simple. If you don't have a mouse, you can move around the AMS screens solely with the keyboard. Some actions can be accomplished only by pressing keys, such as entering data into activity records.

A.2.1 Clicking Mouse Buttons

The AMS recognizes both buttons of a two-button mouse. The left button is used to pick and select items on the screen and the right button is used to cause deletion of an item that can be deleted.

- Clicking and double clicking--When this document directs you to *click*, position the pointer on the object you are to *click* and quickly press and release the mouse button of your choice. When the document directs you to *double-click*, position the pointer on the object you are to *double-click* and, in quick succession, press and release a mouse button twice.

A.2.2 Pressing Keys

You can use many keyboard shortcuts to invoke common commands and move around on the screens. The following sections introduce you to the way that the keyboard may be used.

- Function keys--Use the function key, F10, as instructed in Section A.1.1 to move to the menu bar.
- Arrow keys--The arrow keys (→, ←, ↑, ↓) can be used to move between and within menus and from field to field within forms.
- Tab key--The tab (and shift-tab) key can be used to move forward and backward from field to field and from fields to and among selection buttons on the data entry screens.

A.3 INTERACTING WITH MENUS

The AMS *screen menus* appear at the top of the screens in the menu bar and contain *commands* relevant to the current function. When you choose certain commands, AMS displays a pull-down menu. Figure 4-2 in Section 4.0 shows a closeup of the Main Screen and the pull-down menu that appears when you select "Activity." You can continue to make choices from nested pull-down menus until you arrive at or perform the operation you want. The message bar displays a concise explanation of the command that is currently highlighted. As you move to other commands, this explanation changes. As the cursor is moved by use of the mouse or keyboard, the menu item that will be selected is highlighted with a colored bar.

A.3.1 The Main Menu

The Main Menu is the menu that accompanies the AMS Main Screen (see Figure 4-1 in Section 4.0). The commands on the Main Menu reflect the AMS major functions.

- The System Menu, at the far left of the menu bar, is denoted by three parallel, horizontal lines. Selecting this choice allows further choice of two functions:
 - "Change Password" [P]
 - "Defaults" [D]
- The "Activity" [A] menu allows selection of functions dealing with specific activities. The three choices provided are as follows:
 - "Create" [C] new activity
 - "Validation" [V]: validate any unvalidated activities
 - "Retrieve" [R] existing activities from the database
- The "Lists" [L] menu offers a selection of functions supporting the creation and maintenance of the three types of lists supported by the AMS. These are as follows:
 - "User Lists" [U]
 - "Activity Groups" [A]
 - "Mail Lists" [M]
- Selecting the "Help" [H] menu brings up the on-line help index which provides access to text descriptions of system activities.
- The "Admin" selection is reserved for use by the AMS administrator(s). If the user is not an AMS administrator, this command will be "dimmed out" and will not function.
- The "Exit" [X] selection is used to quit the AMS application. Selecting this brings up the pull-down menu choices "No" [N] or "Yes" [Y]. Choosing "no" returns you to the main screen, while "yes" terminates the AMS session and returns you to DOS or Windows, depending on where you started AMS.

A.3.2 Choosing Menu Commands

Press the F10 key to move the cursor to the menu bar, or click on any command in the menu bar with the mouse. When in the menu bar, use the left and right arrows (← and →) to move between commands along the bar. When choosing a command results in a pull-down menu, use the up and down arrows (↑ and ↓) to highlight its commands; or use the mouse and click the command you want to choose.

Notice that when you move to commands in menus with the arrow keys, you only highlight the command. You do not actually invoke the command until you press the enter key, or click the command with the mouse. This gives you an opportunity to read the explanation of the command in the message bar before you actually execute the command.

NOTE: When in a menu, you can choose a command instantly by pressing the letter corresponding to the "hot key" that is highlighted in that command. Alternately, you can choose a command instantly with the mouse by clicking on it; you do not first have to move to the menu bar by pressing the F10 key.

A.3.3 Canceling Menus

1. To cancel a pull-down menu with the keyboard:

- Press F10 to return to the menu bar.
- Press Esc to back out of pull-down menus one at a time.

Figure 7-1 in Section 7.0 shows the successive pull-down menus that result when you choose "Activity" from the Main Menu, then "Retrieve." Pressing Esc closes these menus one at a time, in reverse order, until you're back at the main menu. Pressing F10 takes you immediately back to the Main Menu and closes all the pull-down menus at once.

NOTE: If you are in the main menu, you remain in the menu bar when you press Esc or F10.

2. To cancel a pull-down menu with the mouse, click anywhere outside of the menu (either the blank desktop or a command in a higher-up pull-down menu or the menu bar).

NOTE: If you click the desktop, the pull-down menu disappears and the menu bar is active once again. If you click a command in a higher-up pull-down menu, or in the menu bar, you invoke that command.

A.3.4 The Menu and the Desktop

At any given moment, you're working either from the menu or on the desktop. When you complete a set of menu choices, the cursor appears in the active window on the desktop and any pull-down menus or dialogue boxes that

led to the active window disappear. At this point, you will have either remained in the Main mode or entered another mode to perform a Paradox^{*} operation. The menu you see in the menu bar is specific to the particular mode you are in.

If you press F10 or click in the menu bar while you are working on the desktop, AMS returns to the menu bar. At that point, the keys you press apply to the menu, not the desktop. You can press Esc to return to the active window on the desktop.

A.4 EXCHANGING INFORMATION WITH THE APPLICATION

The AMS uses two primary structures in supporting communication between the application and the user. The first of these is the *dialogue box*. This structure is used to present information about the operation of the application and collect information from the users about preferences, inputs of parameters, etc. (Figure 7-7 in Section 7.0 is an example).

The second structure used is termed a *form*. Forms consist of data to be input into the database or that has been extracted from the database. Visually, forms can appear to be very similar to dialogue boxes, and the difference is normally not important, operationally. Forms are exited by selecting a menu bar command (usually "Exit"), while dialogue boxes are exited by selecting an action button (see Section A.4.1) (Figure 7-12 in Section 7.0 is an example).

A.4.1 Interacting with Dialogue Boxes

Dialogue boxes will consist of some or all of a standard set of parts. These are as follows.

Text Boxes

Most dialogue boxes contain one or more text boxes. These provide for inputting such information as the user identification (ID) and password, name of a list to be created or retrieved, etc. Figure 5-1 in Section 5.0 shows the Change Password screen with three text boxes.

The amount of data that you can enter in a specific text box depends on what the application will allow. In the case of a very long field, you may scroll the line in the window. You can move the cursor in a text box entry to edit it. Press *Ins* to toggle between overwrite and insert modes. You can also press *Ctl-Backspace* to remove the whole text field. Press *ENTER* or choose *OK* when the text box contains what you want.

Check Boxes

Check boxes consist of a set of choices, each with a "box" consisting of left and right brackets ([]) that is used for selecting that particular

*Paradox is a trademark of Borland International.

choice. You can "check" no box, one box, or as many as you desire, up to all of the boxes. Unlike a menu choice, no action is taken until you exit the dialogue box containing the selected check boxes. As an example, Figure 7-3 in Section 7.0 shows the dialogue box that appears when you choose "Activity," then "Retrieve," "By Role" from the Main Menu. This consists of a series of selection boxes. By moving the cursor to the desired box (or boxes) and clicking the mouse or pressing the space bar, one or more choices can be made (indicated by an "X" in the box). Pressing the bar or clicking the mouse a second time while in the box toggles the "X" off.

Radio Buttons

These are similar to check boxes, but are denoted with paired parentheses (). You must select one of the choices and cannot select more than one. (If you select a second one, the first will be de-selected.) As with check boxes, nothing occurs until you exit the dialogue box containing the radio boxes. As an example, Figure 11-1 in Section 11.0 is a dialogue box with four sets of radio buttons.

Action Buttons

Action buttons (such as "OK" or "Exit") cause an immediate action when "pressed" (by clicking or pressing *Enter* after using the tab key to move the cursor to the button to be activated). Action buttons take the place of the menu bar selections in a dialogue box. For example, Figure 9-1 in Section 9.0 has nine action buttons.

A.4.2 Interacting with Forms

Interacting with forms is similar to interacting with dialogue boxes. The component parts are nearly identical and, at times, it is not easy to tell which you are in. The major difference is that a form has a menu bar, and actions are initiated by selecting these menu choices (as opposed to the use of action buttons in dialogue boxes). Figure 6-1 in Section 6.0 shows the data entry form.

A.4.3 Display Boxes

A third type of device is used to convey information to the user. *Display boxes* appear similar to text boxes, but will not accept input and cannot be altered by the user (i.e., they are "display only"). The text portion of Figure 6-9 in Section 6.0 (the "Undo" warning message) is a sample of a display box.

A.5 MEMO FIELDS AND EDITOR

The AMS uses a Paradox facility termed a "memo field" for three text fields in the activity record. These are the Description Field, Status Field, and Deliverable Field. These fields can contain ASCII text of essentially

unlimited length, although the normal Activity form shows only the part of each field on the screen (four rows of the description, seven rows of the status, and one row of the deliverable).

These memo fields are processed differently from normal Paradox text fields. Instead of merely keying data into the field area shown on the screen, a memo field must first be "opened" for editing (or to view the entire contents) by double clicking the mouse in the field or by pressing F10 and selecting the "MemoEdit" command (Figure A-1) from the menu bar. Once opened, the memo field is transformed into a text edit area using the full screen (Figure A-2).

Once the memo field is "open," the function of inserting or modifying text is accomplished through use of the Paradox Editor. This task is accomplished by keying in text normally, as with WordPerfect.* The mouse will function essentially as it does in the Windows Notepad, or other standard Windows applications. There is some difference in the way the keyboard is used. The following sections describe the Editor keyboard controls, plus the additional editing capabilities that are supported in AMS for memo fields.

Table A-1 shows how to use the keyboard to navigate within the editor, while Table A-2 shows how to highlight text in memo fields. Table A-3 shows how to use the keyboard to edit memo fields.

A.5.1 Additional Edit Features of Memo Fields

In addition to the text-entry-type edit features available through the mouse or keyboard (as described in Tables A-1 through A-3), there are a number of edit functions available through the "Edit" command on the memo field menu bar (Figure A-3). These are as follows:

- WriteFile [W]

Allows all or part of the contents of a memo field to be written to a new or existing DOS ASCII file. If a subset of the data in the memo field has been selected (highlighted), only the selected data will be written to the file. If no subset is selected, the entire field is written.

When the WriteFile function is selected, a dialogue box opens. A text box is provided in which must be entered the DOS file string necessary to identify the name of the file to be written (e.g., C:\EXAMPLE\TEST.TST). The file and directory names must all be valid DOS names and any directories thus specified must exist already. If only a file name and no directory name is entered, the default C:\WPDATA will be used.

*WordPerfect is a trademark of the WordPerfect Corporation.

Table A-1. Using the Keyboard to Navigate Within the Editor.

Key	Action
←	Move one character left
→	Move one character right
<u>Ctrl</u> ←	Move one word left
<u>Ctrl</u> →	Move one word right
<u>Home</u>	First character of line
<u>End</u>	Last character of line
↑	Up one line
↓	Down one line
<u>PgUp</u>	Up one window screen
<u>PgDn</u>	Down one window screen
<u>Ctrl-PgUp</u>	Move to first character in memo field
<u>Ctrl-PgDn</u>	Move to last character in memo field
<u>Num Lock</u>	Cursor/numeric mode toggle for numeric keypad
<u>Scroll Lock</u>	Keyboard scroll lock toggle; when scroll lock is on, cursor remains in place and direction keys cause the text to scroll

Table A-2. Using Keyboard to Highlight Text in Memo Fields.

Key	Action
<u>Shift</u> ←	Select one character left
<u>Shift</u> →	Select one character right
<u>Shift-Ctrl</u> ←	Select one word left
<u>Shift-Ctrl</u> →	Select one word right
<u>Shift-Home</u>	Select from the cursor to the beginning of the line
<u>Shift-End</u>	Select from the cursor to the end of the line
<u>Shift-↑</u>	Select one line up
<u>Shift-↓</u>	Select one line down
<u>Shift-PgUp</u>	Select from the cursor up one windowful
<u>Shift-PgDn</u>	Select from the cursor down one windowful
<u>Shift-Ctrl PgUp</u>	Select from the cursor to the first character of the memo field
<u>Shift-Ctrl-PgDn</u>	Select from the cursor to the last character of the memo field
<u>Esc</u>	De-select (unhighlight) whatever is currently selected

Table A-3. Using the Keyboard to Edit Memo Fields.

Key	Action
<u>Ins</u>	Insert/overwrite mode toggle
<u>Del</u>	Delete character at cursor if no area is highlighted or delete entire highlighted area
<u>Ctrl-Ins</u>	Copy selected (highlighted) area to clipboard, replacing any current material in the clipboard
<u>Shift-Del</u>	Cut selected (highlighted) area to clipboard (removing it from memo field), replacing any current material in the clipboard
<u>Shift-Ins</u>	Insert (paste) the material from the clipboard at the current cursor position in the memo field
<u>Alt-D</u>	Delete from the current cursor position to the end of the current word, including any punctuation characters and spaces at the end of the word
<u>Ctrl-Y</u>	Delete entire line cursor is on
<u>Alt-F7</u>	Send current memo field to printer

- ReadFile [R]

Provides ability to open and copy the data from any DOS ASCII files. The entire contents of the file are copied to the current location of the cursor.

When the ReadFile function is selected, a dialogue box is opened. A text box (containing the current directory) is available for selecting the desired directory.

Below this text box is a box displaying, in a 3 by 5 matrix, the files present in the current directory. This display changes as different directories are selected. Once the desired file is highlighted, the ReadFile action button below the file box is used to copy the contents of the file into the memo field.

A Cancel action button allows you to terminate the ReadFile command and return to the memo field edit operation.

Five hot keys are available for moving around the ReadFile dialogue box. These are as follows:

- Current Directory [D]: To move to the directory text box
- Change Directory [G]: To execute a change to the new directory specified in the text box
- Files [F]: To move to the file list box so that a file may be selected

- ReadFile [R]: Effects reading of selected file into the memo field
- Cancel [C]: Abort the FileRead command and return to the memo field edit functions.

- Find [F]

This command supports locating text strings within the memo field. When the command is selected, a dialogue box opens with a text field into which the character string to be located is keyed. The search is forward only, from the current location of the cursor, so if the entire field is to be searched, move the cursor to the beginning. The search is case insensitive, so capital or lower case letters match equally.

This command supports the use of two *wildcard* characters. The "@" represents any single occurrence of any character. The ".." operator represents any number of any characters.

- FindNext [N]

This command causes the last Find to be repeated. FindNext can be repeated as many times as desired without changing the search string.

- Search & Replace [S]

The Search & Replace command supports substitution of one text string for another. Selecting this command opens a dialogue box with two text boxes. Into the first, insert the text string to be matched against the contents of the memo field. The search will be forward from the current location of the cursor, just as in the Find command. The "@" and ".." wildcards may be used.

The string to be used to replace the located text is keyed into the second text box. Wildcards may not be used!

Two action buttons provide for either executing the operation or canceling it. The Search [S] action button executes the operation which will replace ALL occurrences of the specified text string with the specified replacement text. No verification of this replacement is provided and no undo is available. Great care must be exercised in the use of wildcards and short character strings. For example, a command to change "a" to "the" will also change "than" to "ththen" unless the "a" is entered with spaces on each side.

It is advisable to save the contents of the memo field by selecting Exit [X] and Save [S] and then reentering the memo field edit mode before executing a Search & Replace with wildcard characters unless you are absolutely sure you will change only the text you specify.

- Cut [T]

This pull-down menu command performs the same function as the *Shift-De1* keys described in Table A-3.

- Copy [C]

This command performs the same function as the *Ctrl-Ins* key combination described in Table A-3.

- Paste [P]

This command performs the same function as the *Shift-Ins* key combination described in Table A-3.

A.5.2 To Conclude Memo Field Operations

When operations on the memo field have been concluded, select the Exit [X] command from the menu bar. A pull-down menu will offer two choices: Save [S] causes the current contents of the memo field to be written to the database; Undo [U] abandons any changes that may have been made and returns to the previous form without modifying the database.

A.6 SEARCH STRING OPERATORS

The AMS search commands accept various Paradox operators to expand your search capabilities. Table A-4 lists the operators supported by AMS.

Table A-4. Operators Supported by the Activity Management System.

Category	Operator	Meaning
Arithmetic operators	+	Addition or concatenation
	-	Subtraction
	*	Multiplication
	/	Division
Comparison operators	=	Equal to (optional)
	>	Greater than
	<	Less than
	>=	Greater than or equal to
	<=	Less than or equal to
Wildcard operators*	.. (2 periods)	Any number of any characters
	. @	Any single character
Special operators	LIKE	Similar to
	NOT	Does not match
	BLANK	No value
	TODAY	Today's date
	OR	Specify OR conditions in a field
	, (comma)	Specify AND conditions in a field

*NOTE: Use of the wildcard operators "turns off" case sensitivity in the match function.

Figure A-1. MemoEdit Menu.

Figure A-2. Memo Edit Screen.

Figure A-3. Memo Edit Screen, Edit Menu.