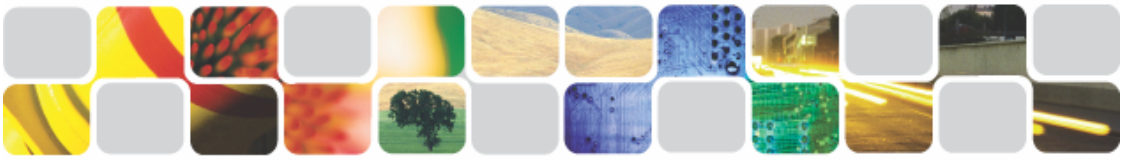
the enviance system



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Introduction to the Enviance System

The Enviance system allows you to consolidate and manage all your compliance-related data and activities across your organization. Unlike other solutions, the Enviance System is fully integrated and tracks numeric emissions data as well as tasks. It enables you to concurrently reference and manage detailed numeric data, giving you complete calculations, analysis, reporting and tracking capabilities.

The various components of the Enviance system allow you to:

Streamline your compliance-related tasks and workflow.

Monitor your compliance data and cut response time.

Maintain audit, incident and inspection logs.

Generate reports for compliance filings and for business analysis.

Coordinate your documentation.

The Enviance System can be accessed anywhere anytime with just a web browser and internet access. The system is accessed over a secure internet connection.

OBJECTIVES

When you have completed this lesson, you will know how to:

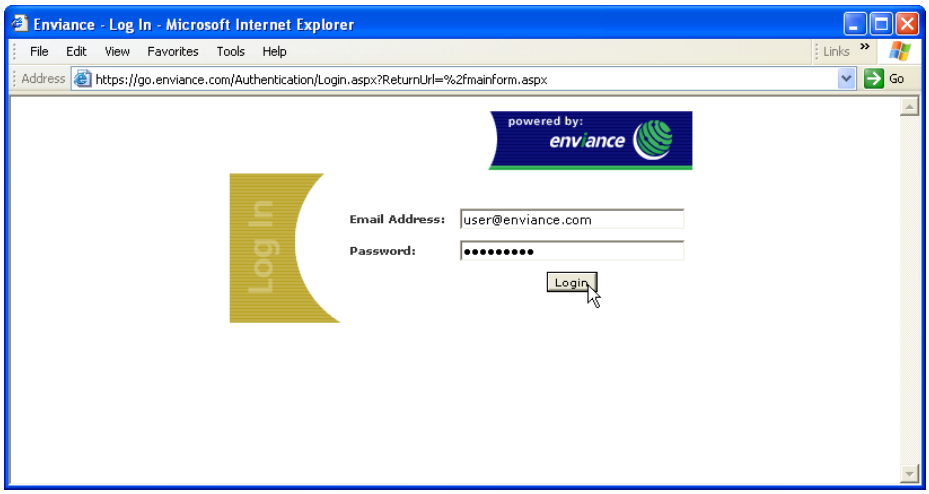
- ⇨ Log into the system for the first time and change your password.
- ⇨ Log into the system from a system-generated email notification.
- ⇨ Navigate the System Model
- ⇨ Use the Search function.
- ⇨ Edit your profile
- ⇨ Change your password.
- ⇨ Log out of the system.
- ⇨ Access and use the online help.

First Time Login

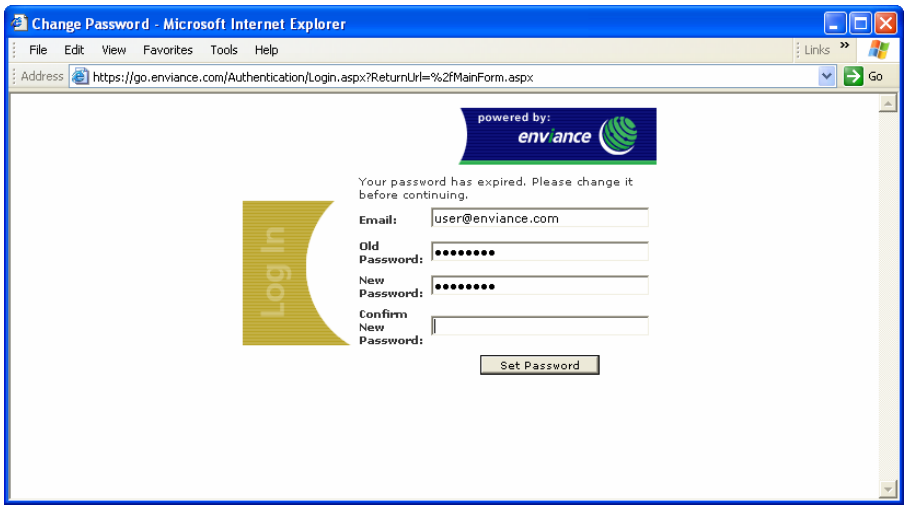
To access the Enviance system, you must log in with your user ID and password. Your administrator will set up your user ID and an initial password for you in the system. The first time you log in to the system you will be required to change your password.

To log in:

1. Navigate to the login page by entering the following URL in your web browser:
   go.enviance.com
2. Enter your user ID and the password that was provided to you and click Login.



A password change page is presented.

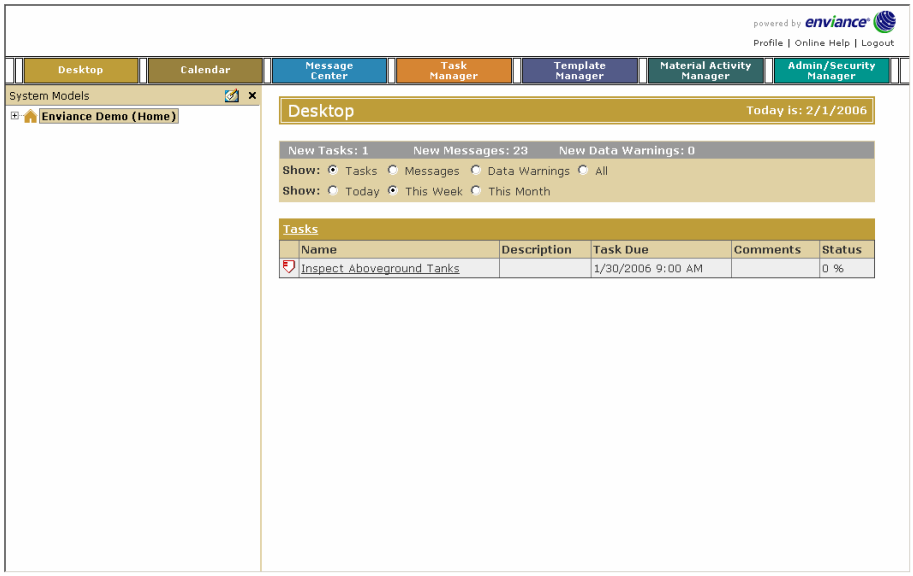


3 Enter the password you were given in the Old Password box.

4 Enter your new password in the New Password box and confirm it by entering it again in the Confirm New Password box.

5 Click Set Password.

You will be logged in and the main system screen appears.



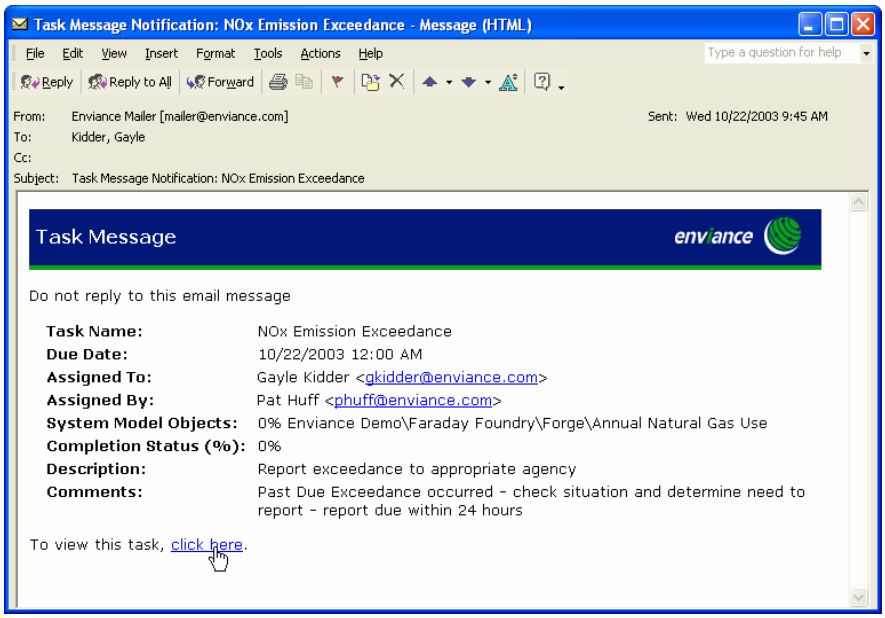
The right side of the screen shows the user Desktop. The default view shows today's tasks assigned to you. You can use the Show button options to change the time period or the message type displayed.

Logging In From Email

System-generated emails are frequently sent out to notify users of system tasks or data warnings. You can access the system by following the link in the email. When the email is a task notification, using the link in the email takes you directly to the task completion form after logging in.

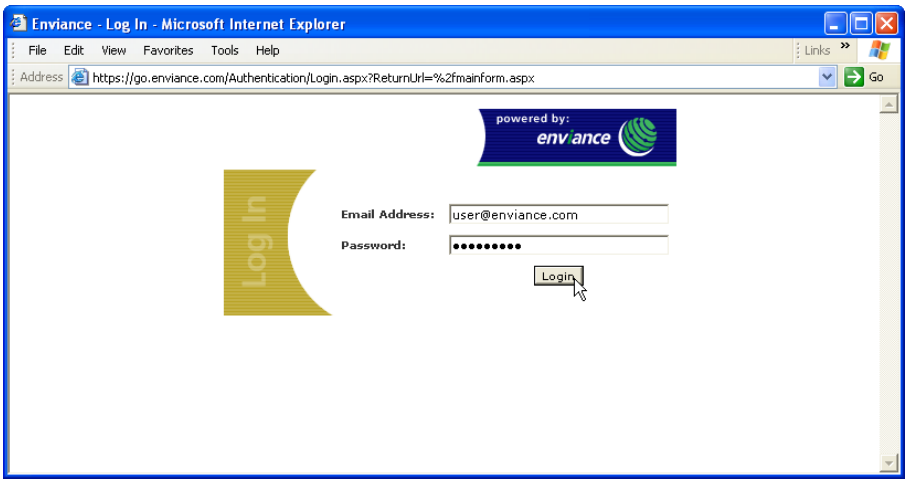
To log into the system from an email task notification:

1 Open the email that was sent to you from the Enviance system.



2 Select the link at the bottom of the email that says: "To view this task, click here."

The login page opens in your web browser.



3 Enter your email address and password and click Login. If login is successful, the task completion page for the task is displayed, ready for you to enter task update information.

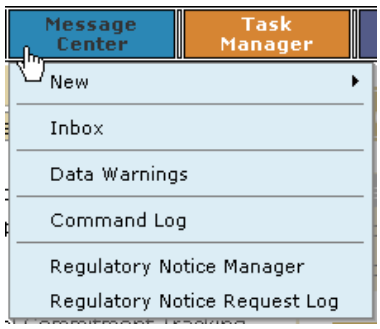
System Navigation

The three components of the interface are the Navigation Frame, the System Model Frame, and the Content Frame.

Navigation Frame

The top frame is the navigation frame, which contains the main menu items, plus links in the top right to access your Profile, Online Help and to Log Out.

When you move the cursor over the main menu buttons, an appropriate menu for that button displays (some buttons do not have menus).



Click on a menu button or an option in the menu list to go to the corresponding area. The content frame then shows the appropriate content.

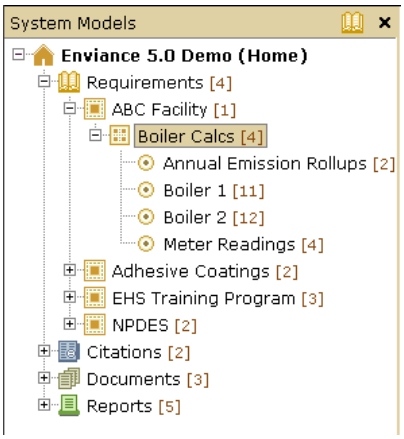
> Note: The buttons and menu options that are available depend on your user rights in the system. If you do not have access to certain functions, the buttons and/or menu options will be disabled.

System Model Frame

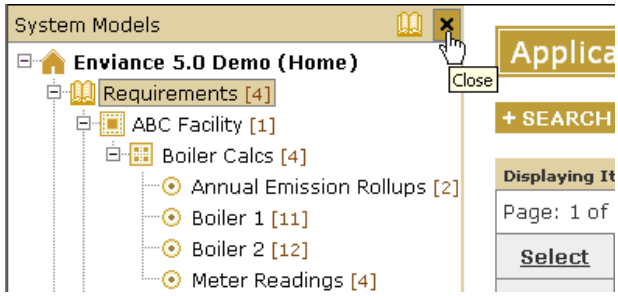
The left pane is the System Model frame, which shows four sections:

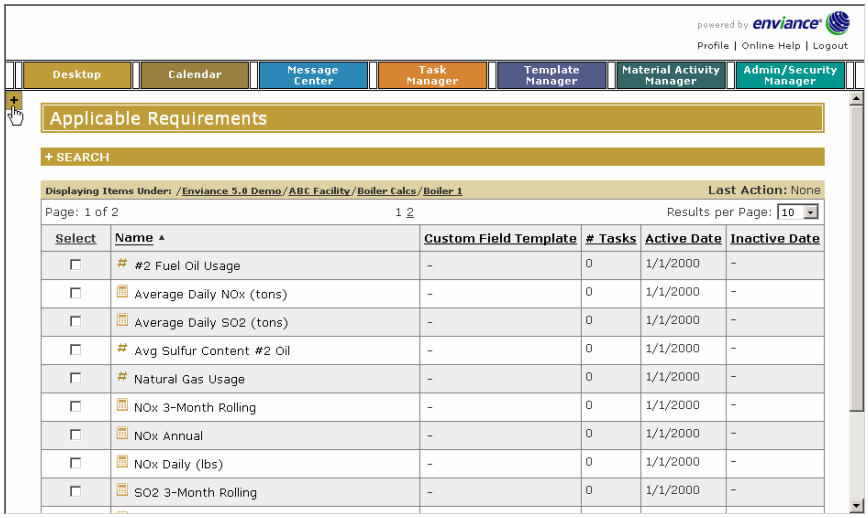
Requirements expands to show the organizational structure of your System Model as a hierarchical tree, comprised of Facilities, Units and POIs. These components may be actual physical entities (such as a production plant or part thereof) or representations of various regulatory program areas (such as air quality requirements or Title V permits), or a mix of the two.

Below the Requirements are folders containing the Citations, Documents, and Reports stored in your system. These sections expand into a similar hierarchical structure of folders, with the contents (document files, reports, or citations) displayed in the Content Frame.



You can Show or Hide the System Model frame in order to expand the working area in the content frame if you wish. To hide the System Model frame, click the X in the upper right corner of the System Model frame. Click the plus (+) sign in the top left corner to show the system model frame again.





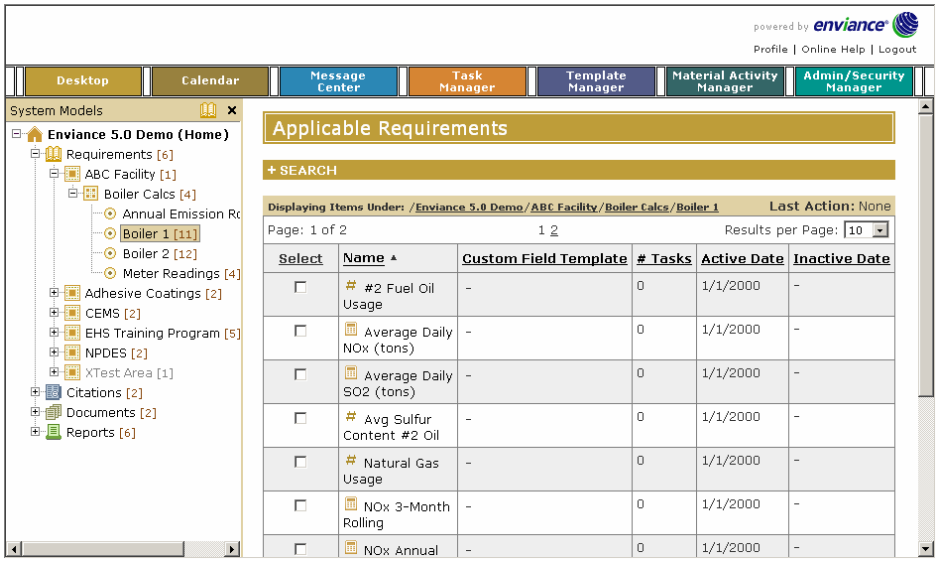
Note: The parts of the System Model you see are those objects to which you have been granted permission by the system administrator. The system model may include other objects to which you do not have permission. If you do not see items you need to work with, see your system administrator.

Content Frame

The right pane is the Content Frame. This is the main content area where most of your interactions take place, such as:

- View tasks
- View data
- Enter and update data
- Complete tasks
- Generate reports
- Communications, such as messages and data warnings

When you click on an object in the Requirements tree, the default view is to show the Requirements related to it and/or its child objects in the Content Frame. The display is similar to the display of folders and files in Windows Explorer – that is, subfolders will appear in both the System Model Frame and the Content Pane, but Requirements (like files) only appear in the Content Pane.



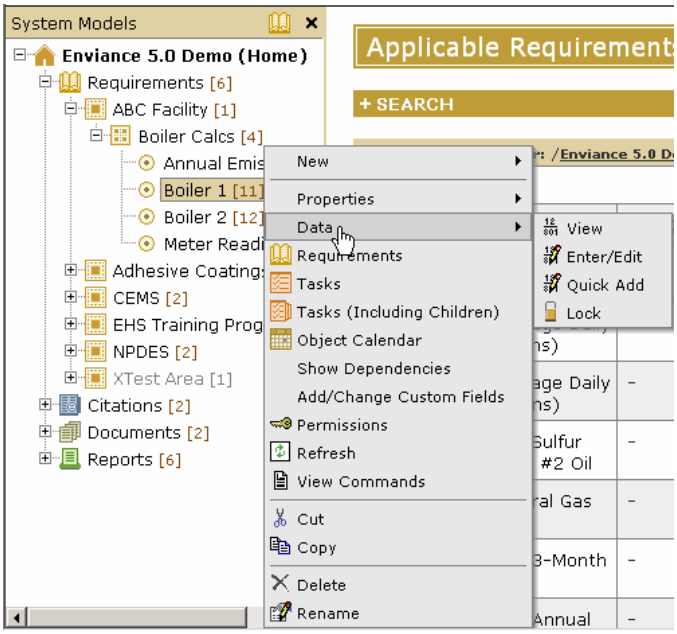
Each system model object has certain other views and actions that can be performed, depending on the type of object.

Using the Right Click Popup Menu

Menu options are available for objects in both the System Model frame and the Contents Frame from a right-click popup menu.

To see menu options for a System Model object:

4 Right click on the object in the Requirements tree.



Note: The right-click context menu options will vary depending on the user's rights and the type of object selected.

The popup menu shows what actions are available for this object. The options vary depending on the type of object selected and on the permissions you have.

Note: Those functions to which you do not have permission are grayed out.

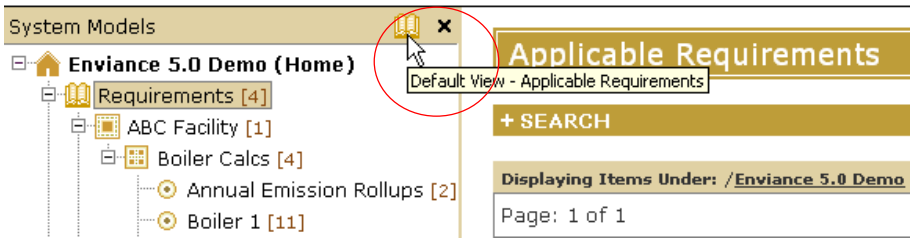
To select an action from the menu:

5 Click on the menu option with the left mouse button.

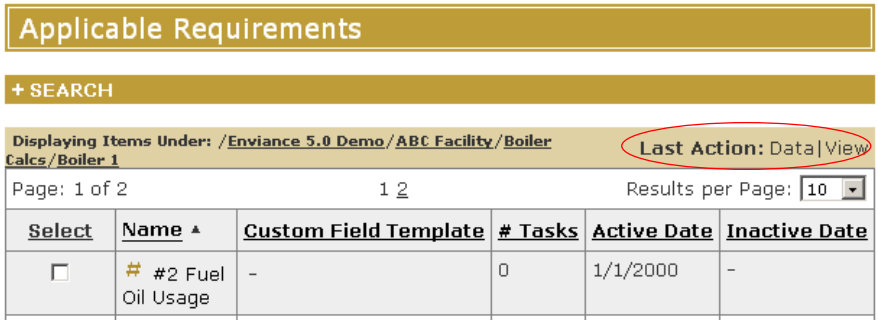
Once you choose a menu option from the right-click popup menu, that menu option becomes the default action for subsequent objects you select (unless that action is not available for the object).

Default menu options are available for both the System Model Frame and the Content Frame.

- From the System Model Frame, the default action is the Applicable Requirements view. In this view, when you select an object in the requirements tree, the applicable requirements are displayed in the Content Frame, or the immediate child objects (Units or POIs) from the Requirements tree. The active menu option is indicated by an icon in the title bar of the System Model frame. An explanatory tool tip appears when you hover the mouse over the icon

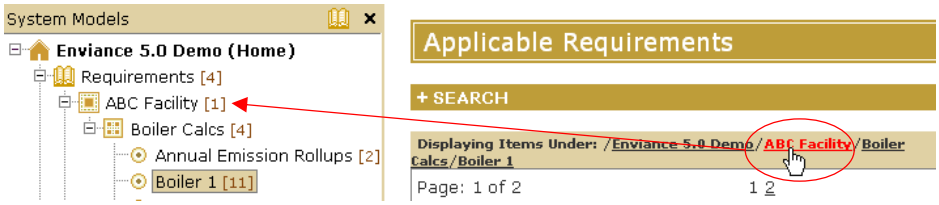


- From the Content Frame, the default action is the last action performed. The Last Action is shown in the status bar of the Content Frame.



If you select Data > Enter/Edit from the right-click popup menu for an object, the data entry screen is displayed for that object. If you select another object, the data entry screen for the new object is shown. Data entry mode then remains the display mode until you choose another menu option. If the default option is not available for an object, the object properties are displayed.

The status bar also contains a "breadcrumb" link that shows the path of the current container in the System Model. The path is hyperlinked and can be used for navigation. Click any part of the path to navigate back up the tree to that level.



Searching for Objects

An expandable Search function is available from most areas of the application. To use the search function (to search for requirements, documents, tasks, etc.), simply click on the plus sign (+) to expand the search pane.

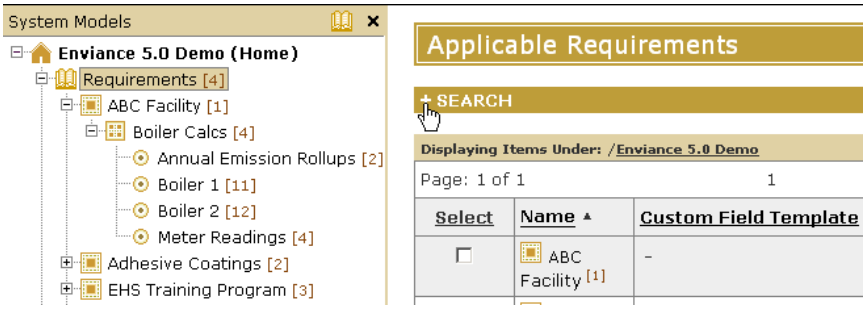
The search may be initiated from any container to search for objects under that container.

To search for objects:

6 In the System Model tree, select the container from which you want to start the search.

To search the entire system, select the top-level Requirements object. Select a Facility, Unit or POI to search for child objects under that parent.

7 Click the plus sign (+) in the Search bar.



The Search section expands to show the available search criteria.

8 Set the search critieria in the Search section, using only those search criteria you want to include.

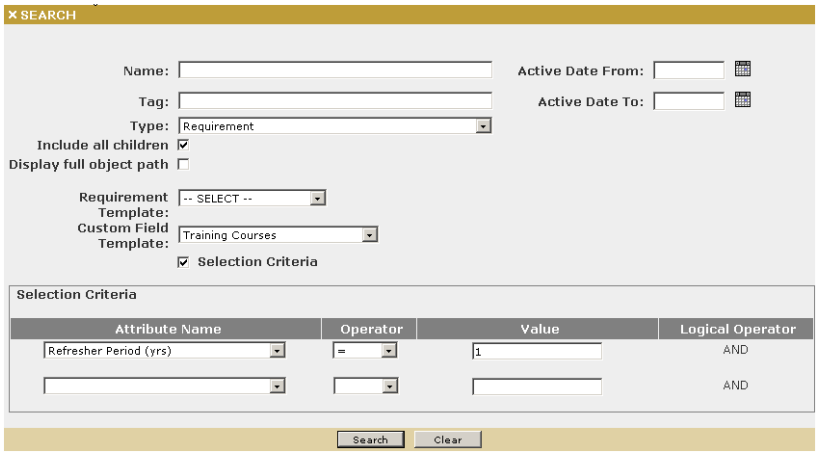
Check "Include all children" to see objects at all levels below the selected object.

Check "Display full object path" to see the full path of the object (its location in the Requirements tree).

To filter for objects by name or type, enter the object name in the Name field. For Type you may choose all requirements or the specific requirement type, as well as any system model object type.

You can filter for objects that share the same Requirement Template or Custom Field Template by choosing the template from the list.

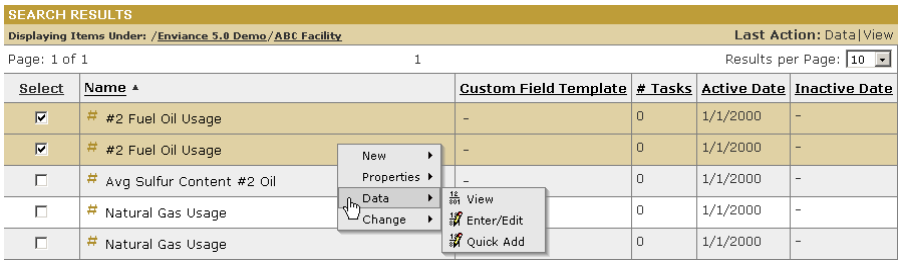
Check the Selection Criteria box if you want to filter by field values on a requirement template or custom template. You may then choose an attribute and a value to filter on.



9 Select Search.

If no results are returned from the search, be sure you have checked Include all children, and that the search is initiated from the appropriate section of the tree.

Bulk operations for multiple objects are available by selecting the checkboxes for selected items, then right click to show a popup menu with available options.



Edit Your Personal Profile

You can access your Personal Profile to change your password and manage your personal information, including email and other contact information. The first time you sign in, you should check your profile for accuracy. You are responsible for keeping your profile up to date in the system, so that notifications will be properly routed to you.

Your email address and your time zone, which are stored in your profile, are especially important, as they are used to send task notifications and data warnings.

To edit your personal profile:

1. Select the Profile link in the upper right corner of the screen, below the Enviance logo.
2. On the Profile page, edit the fields you wish to change.

   Required information is marked with a red asterisk. You may edit required information but you may not delete it. The following fields are required:

   Login ID: Your Login ID (username) is assigned to you by your administrator and cannot be edited.

   User Email: Your correct email is important because it is used to send system notifications.

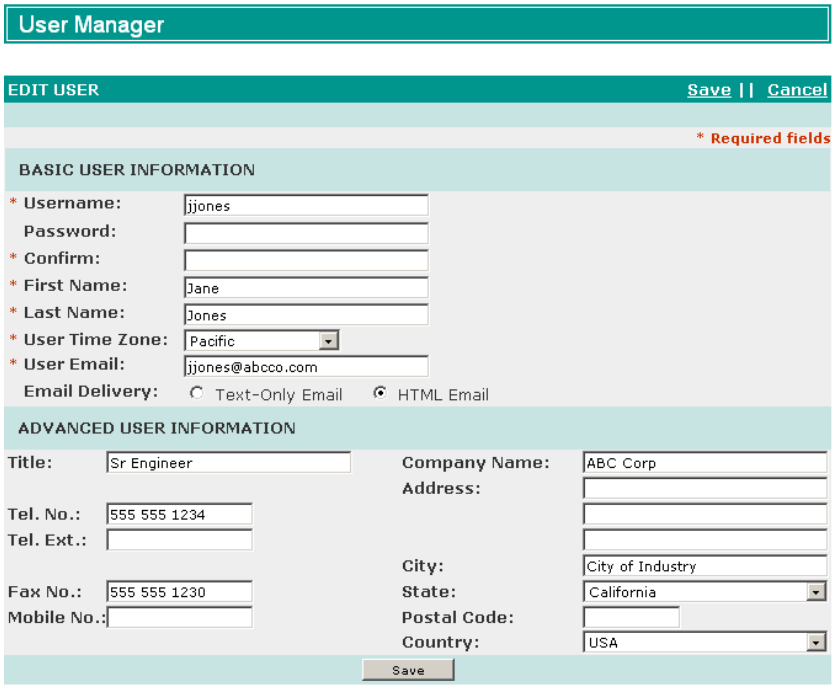
   You can also choose the email format (HTML or text only). In order to log in and access tasks from a link in an email notification, you must enable HTML email.

   User Time Zone: All dates and times are stored in the database as UTC time. Dates and times are displayed in your user time zone for most time fields.

   First Name

   Last Name
3. Click Save.

   Note: You do not need to enter your password to save changes to your profile. However you may use the Password and Confirm fields if you want to change your password.



Change Your Password

If your system security settings allow it, you can change your password when you wish from the personal profile page.

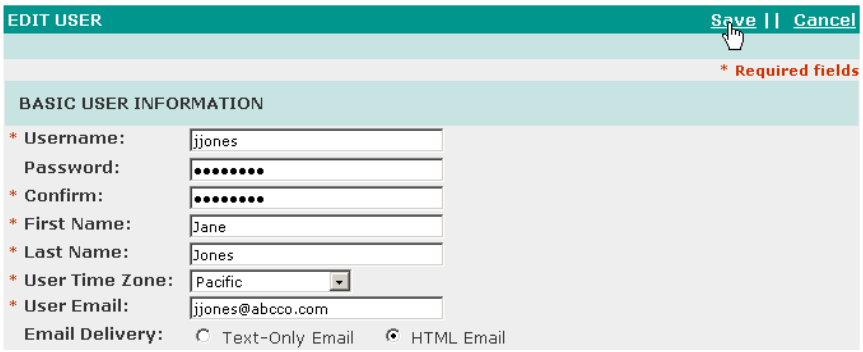
Depending upon the security setup for your system, you may be required to change your password from time to time. If your password expires, you will be required to change your password when you next log in from the login page.

To change your password:

1 Select the Profile link.

2 On the Profile page, enter your new password in the Password box.

3 Re-enter the password in the Confirm box.



4 Click Save.

Your new password is activated immediately.

Logging Out

For security reasons, you should log out of the system and close your browser after completing your work.

To log out of the Enviance system:

1. Select the Log Out link on the top right corner of the screen (below the Enviance logo).
2. In the confirmation dialog, click OK to log out now, or Cancel to remain logged into the system.

For security purposes, users are automatically logged out after a period of inactivity. (The time period varies according to the administrative setup.)

Using Online Help

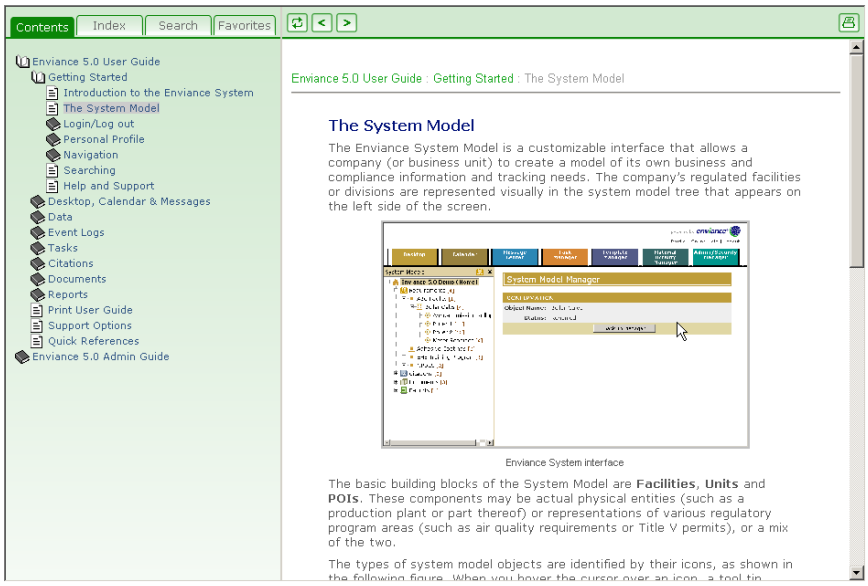
A searchable online help system is available to help you find quick answers to your questions about using the Enviance system.

Display help topics by selecting the Online Help link in the top left corner, under the Enviance logo.

To browse the online help system:

1. Select the Help link from in the top left corner, under the Enviance logo.

   The help system appears in a new browser window so you can continue working while you search for help information. The table of contents for the help system is displayed.
2. Click the plus (+) sign to expand a section and browse the contents for the topics you want.
3. Click a title in the table of contents to display the topic in the content pane.



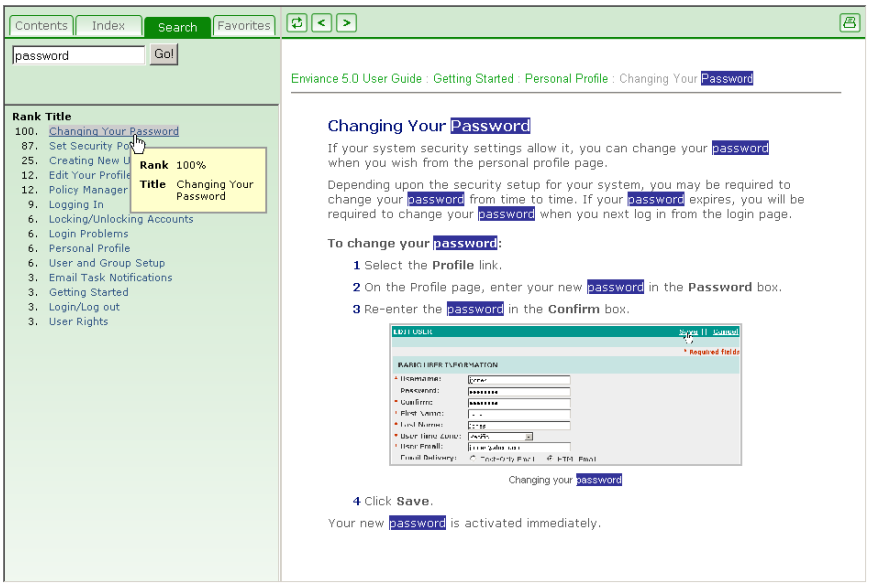
To search the help system for answers to your questions:

1 Select the Search tab.

2 Enter a keyword or phrase and select Go.

A list of topic titles that contain the phrase is displayed. Select a topic to display it in the content pane.

The keyword or phrase is highlighted in the topic to help you find the information you want.

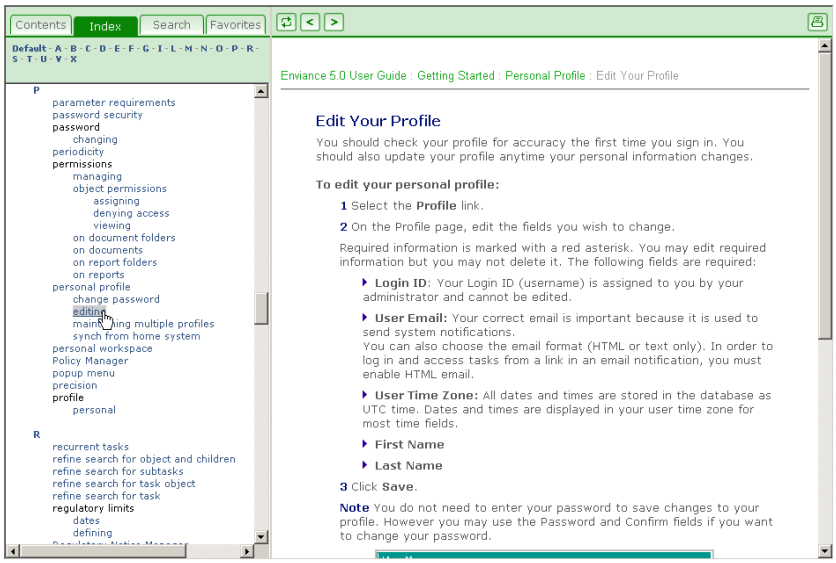


To search index topics:

1 Select the Index tab.

2 Browse the index alphabetically to find the topic you want.

3 Select a linked word or phrase in the index to display the topic in the content pane.



LESSON RECAP

- ⇨ When you log into the system for the first time you must change your password.
- ⇨ You can log into the system directly from an email task notification.
- ⇨ Requirements are accessed from a hierarchical tree that represents your organization's structure and compliance obligations.
- ⇨ You can access extended functions for each object from a right click menu.
- ⇨ You can edit your profile and change your password from the Profile link.
- ⇨ Use the Logout link when finished and close your browser to ensure security.
- ⇨ A comprehensive, searchable online help system is available to answer your questions.

Completing System Tasks

The Enviance System helps you fulfill all your compliance-related obligations through the sophisticated Task Management tool. The system keeps track of when tasks are due and sends out automatic email reminders to help ensure that all deadlines are met. The system can also automatically trigger tasks when certain events occur, such as data limit exceedances or accidents that require reporting, enabling rapid response and quick corrective action.

OBJECTIVES

When you have completed this lesson, you will know how to:

- ⇨ Log into the system from an email task notification
- ⇨ Complete a task
- ⇨ Document compliance with a non-numeric requirement through a task
- ⇨ Complete a task related to multiple objects
- ⇨ Understand an overdue task notification
- ⇨ View your task calendar
- ⇨ Search for and complete recurring tasks
- ⇨ Complete multiple tasks at once

Logging In From Email

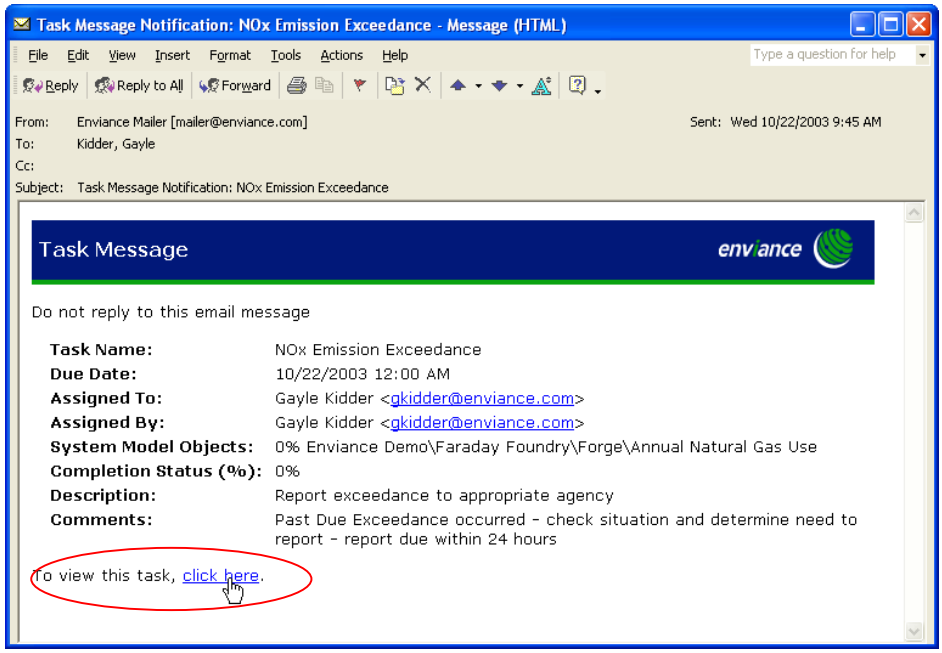
When you are assigned tasks in the Enviance system, you receive an email task notification. You can access the system by following the link in the email task notification. Using the email link ensures that you are taken directly to the task completion form after logging in.

To log into the system from an email task notification:

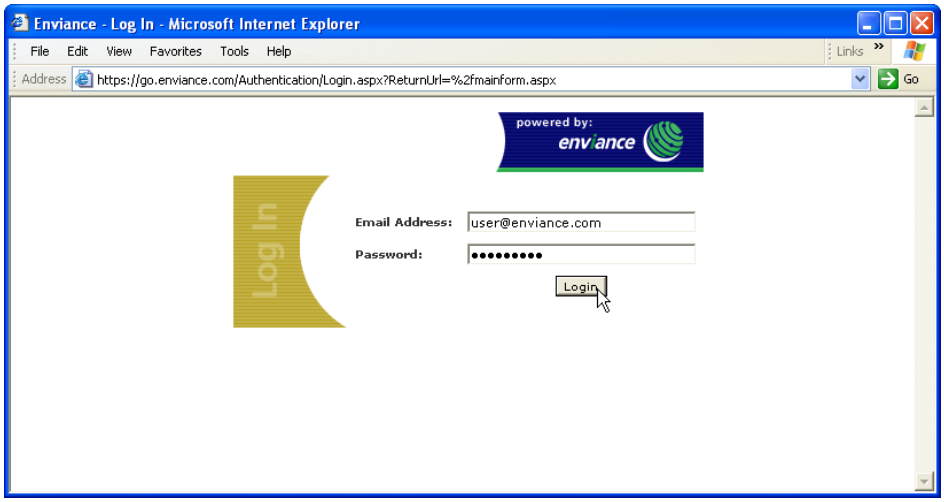
1. Open the Task Message Notification from Enviance Mailer in your email inbox.

   The Assigned To line in the email shows who is assigned to the task. Tasks may be assigned to more than one person.

2. Select the link at the bottom of the email that says: "To view this task, click here."



The login page opens in your web browser.

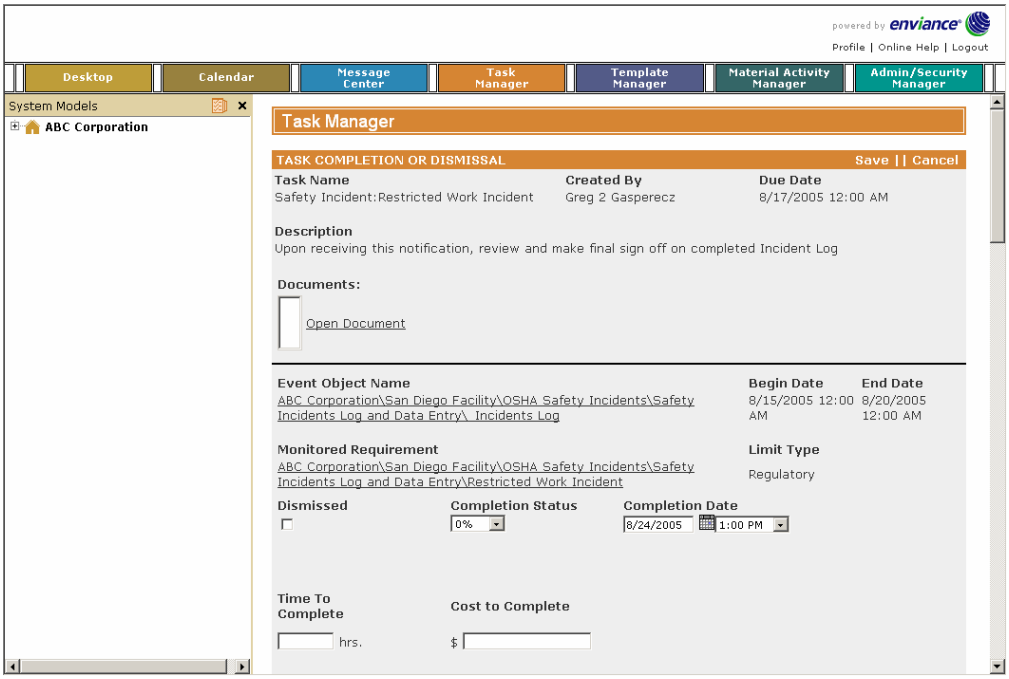


3 Enter your email address and password and click Login.

If login is successful, the task completion page for the task is displayed, ready for you to enter task update information.

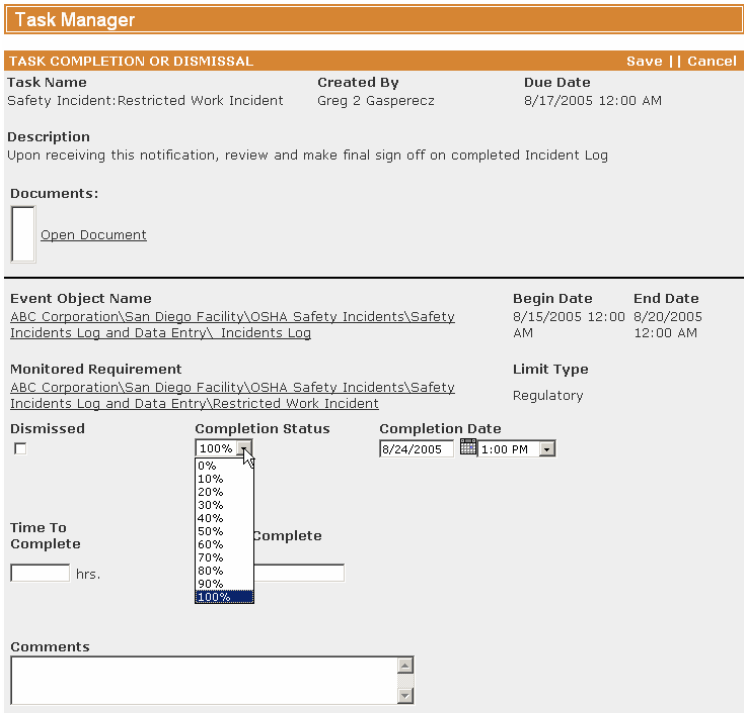
Completing a Task

After you have logged into the system from the task email link, the Task Completion form appears.



To complete a task in the system:

1 In the Completion Status box, select 100%.

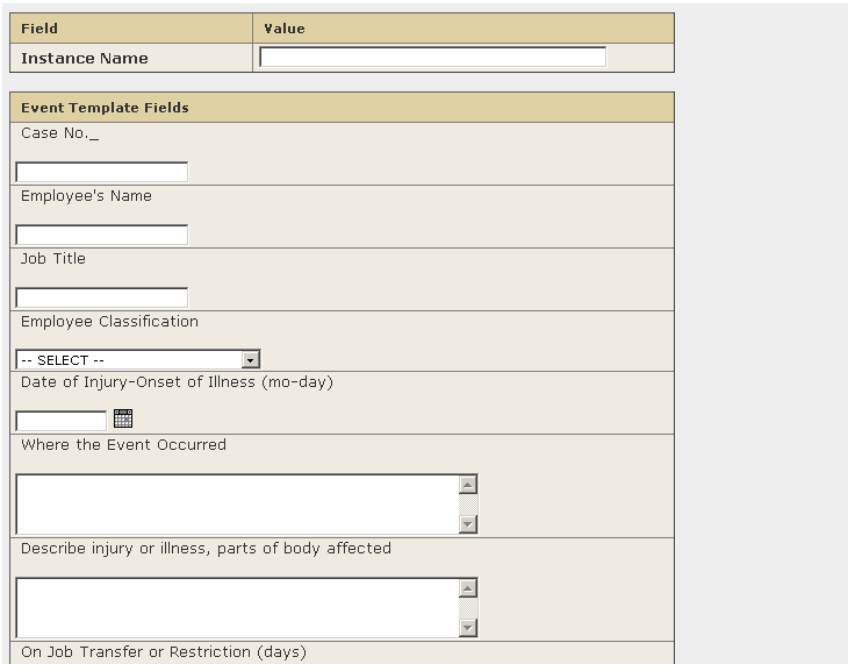


2 Enter the Completion Date. (You can click the small calendar button to select a date from the calendar.)

The Time to Complete and Cost to Complete fields may also be completed, if this information is required. If not, leave them blank.

3 Enter any relevant comments in the Comments box.

Some tasks may have additional information fields available for entry. Complete these fields as applicable.



4 When you have completed the form, click Save.

Completing Compliance Information for Tasks

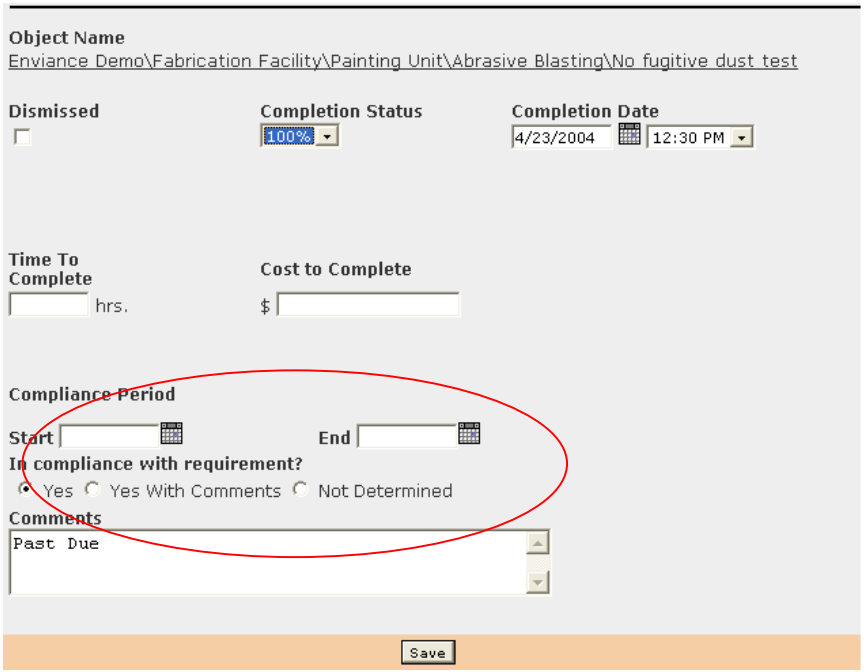
Tasks that are related to non-numeric requirements have additional fields to record the compliance status. These fields are used when generating compliance reports from the system, so they must be completed to properly document compliance with a non-numeric obligation.

To complete a task related to a non-numeric requirement to document compliance:

1 In the Task Completion form, set the Completion Status to 100% and enter the Completion Date.

When you select 100% completion status, the following fields appear:

- Compliance Period Start/End date fields
- In Compliance with requirement? (Yes/Yes with Comments/Not Determined)



2 Answer the "In Compliance with requirement?" question by selecting the appropriate radio button:

- **Yes**: Indicates that the requirement was met.
- **Yes With Comments**: Indicates that the requirement was met, but additional comments are noted.
- **Not Determined**: Indicates that the requirement was not met, or compliance cannot be determined.

Enter any relevant comments in the Comments box.

3 Select the dates for the Compliance Period. These are the dates for which the related requirement is either "in compliance" or for which status cannot be determined.

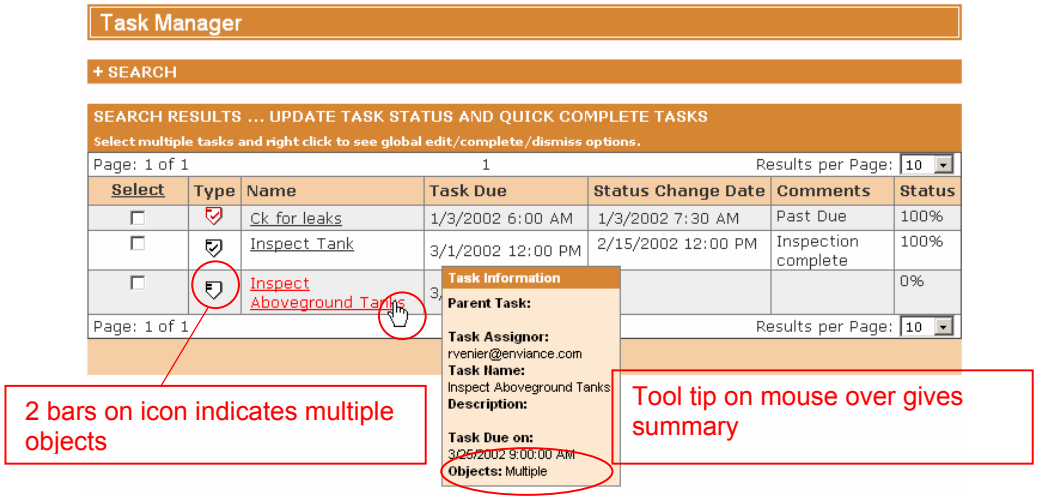
The Time to Complete and Cost to Complete fields may also be completed, if this information is required. If not, leave them blank.

4 Click Save.

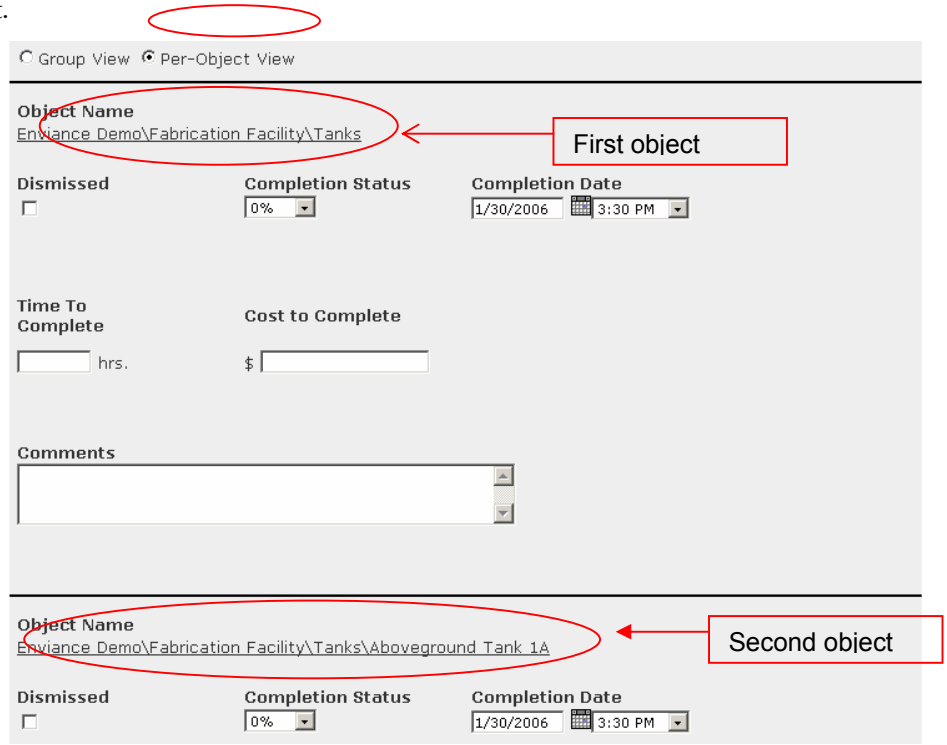
Completing Tasks for Multiple Objects

Some tasks may apply to more than one object in the system. When the task assignee completes the assignment, the system allows the assignee to sign off on all similar assignments at once, or to complete each one individually. An example of this type of task is a monthly inspection requirement that applies to several pieces of equipment.

In Task Manager, multiple object tasks can be identified by the two bars that appear on the task icon. The tool tip that appears when you hold the cursor over the task name also tells you this is a multiple object task.



The task completion form for a task that applies to multiple objects has sections for each object. The Object Name in the task form indicates which section concerns which object.



You can mark the task complete for each object separately, or mark all complete at once.

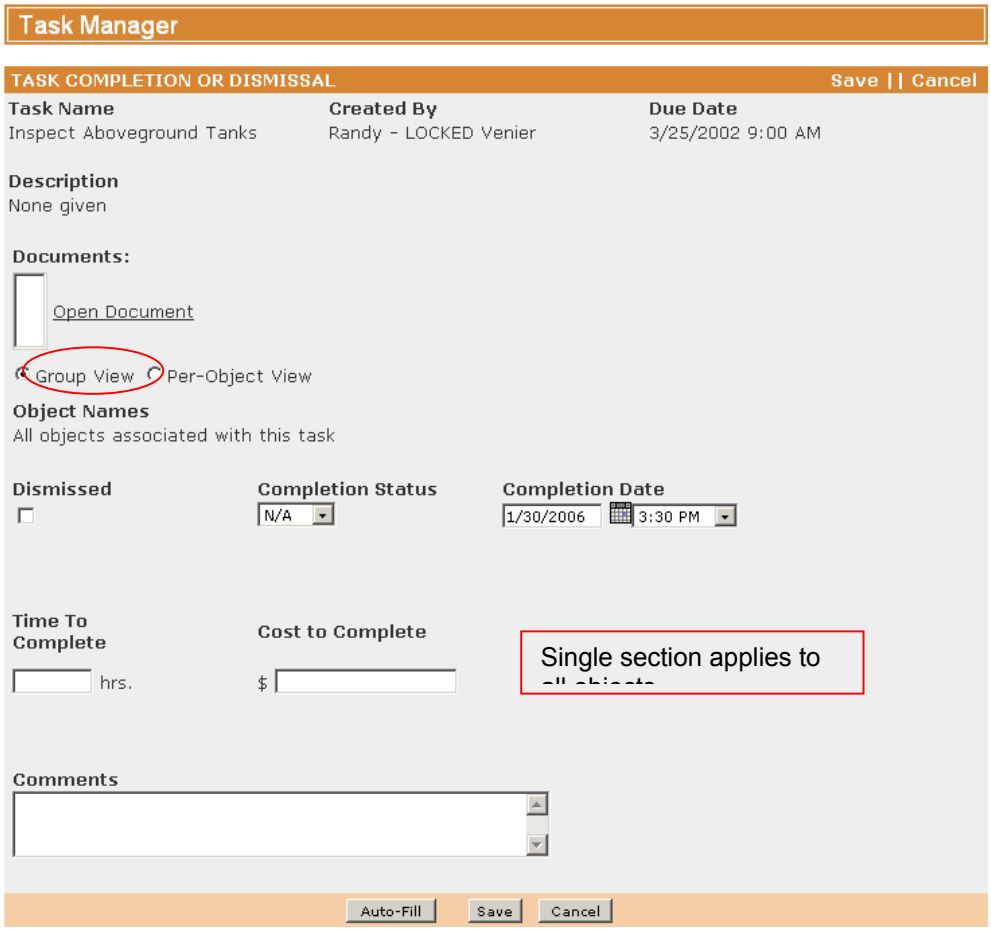
If the task is complete for one object, but not all:

1. Complete the section for the appropriate object(s).
2. Click Save to save the information.

   You can open the task form again later to complete the sections for the other objects. The task remains open until all objects are marked 100% complete. You will continue to receive reminder notifications, if appropriate, until all sections have been marked complete.

To complete a task for all objects at once:

1 Select the Group View radio button.



The form collapses so there is now one section to complete for all compliance objects.

Complete the form as before:

- Enter Completion Status (=100%).
- Select Completion Date.
- If the task is related to Non-numeric requirements, answer the "In compliance with requirement?" question and select the Compliance Period dates.
- If the task is event-related, complete the event fields on the form.
- Add any Comments.
- Enter Time to Complete and Cost to Complete information, if relevant.

2 Click Save.

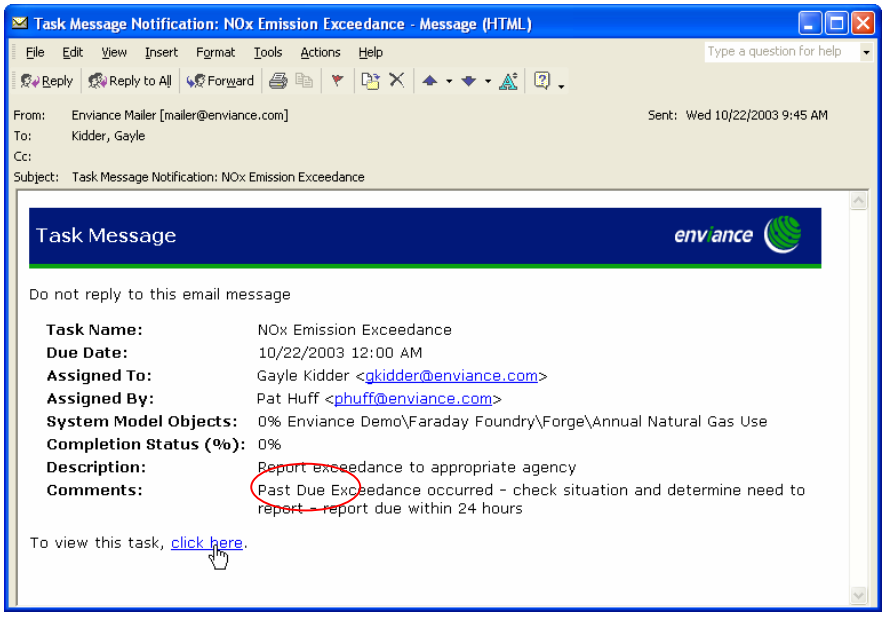
In the Group View, all obligations are now marked 100% complete and the task is closed.

Note: The Auto-fill button can be used to complete the fields for all objects at once. After clicking Auto-fill, the view switches to from Group View back to Per Object View. You may then edit the information for one or more objects before saving. This can save time when information is only slightly different for different objects. You may want to use this, for example, to fill in the same Compliance Period and status for all objects, then switch back to Per Object View to add individual comments.

Overdue Task Notifications

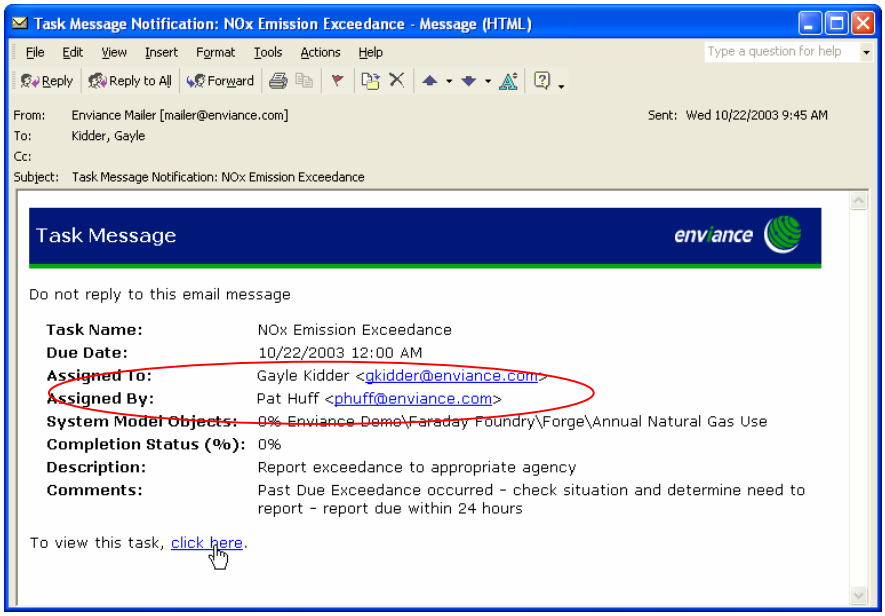
If a task becomes overdue, an email notification is sent immediately to all task assignees. The task assignor also receives a notice.

The Comments section in the email indicates that the task is Past Due.



If you are the assignee and the task has been completed, you should access the system immediately to complete the task completion form. You will continue to receive overdue notifications from the system until the task is marked 100% complete.

Other notifications may also be set up for the task, such as a notification to a supervisor when the task is overdue. If you are a supervisor and you receive an overdue task notification, the assignees and assignor are shown in the email for follow up procedures. You may click the link in the email to log into the system and view the task and see its current status.

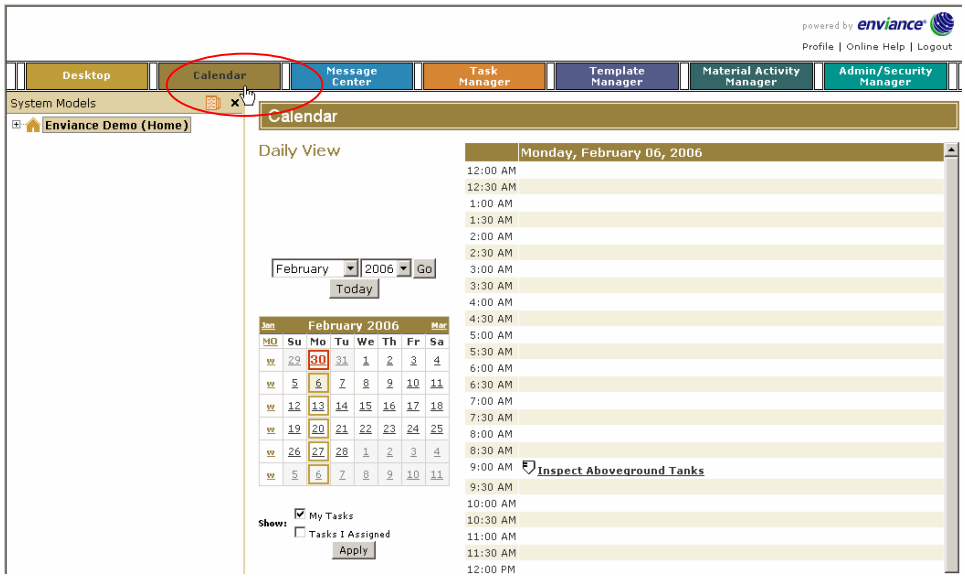

Task Message Notification: NOx Emission Exceedance - Message (HTML)
File Edit View Insert Format Tools Actions Help
Type a question for help
Reply Reply to All Forward
From: Enviance Mailer [mailer@enviance.com]
Sent: Wed 10/22/2003 9:45 AM
To: Kidder, Gayle
Cc:
Subject: Task Message Notification: NOx Emission Exceedance
Task Message
enviance
Do not reply to this email message
Task Name: NOx Emission Exceedance
Due Date: 10/22/2003 12:00 AM
Assigned To: Gayle Kidder <gkidder@enviance.com>
Assigned By: Pat Huff <phuff@enviance.com>
System Model Objects: 0% Enviance Demo\Faraday Foundry\Forge\Annual Natural Gas Use
Completion Status (%): 0%
Description: Report exceedance to appropriate agency
Comments: Past Due Exceedance occurred - check situation and determine need to report - report due within 24 hours
To view this task, click here.

Task Calendar

You can check for upcoming tasks and view your overall task schedule using the Task Calendar. The calendar is useful for keeping track of the tasks for which you are responsible, especially if you will be away from the office for a certain period.

To see your schedule of upcoming tasks:

1 Select the Calendar button.

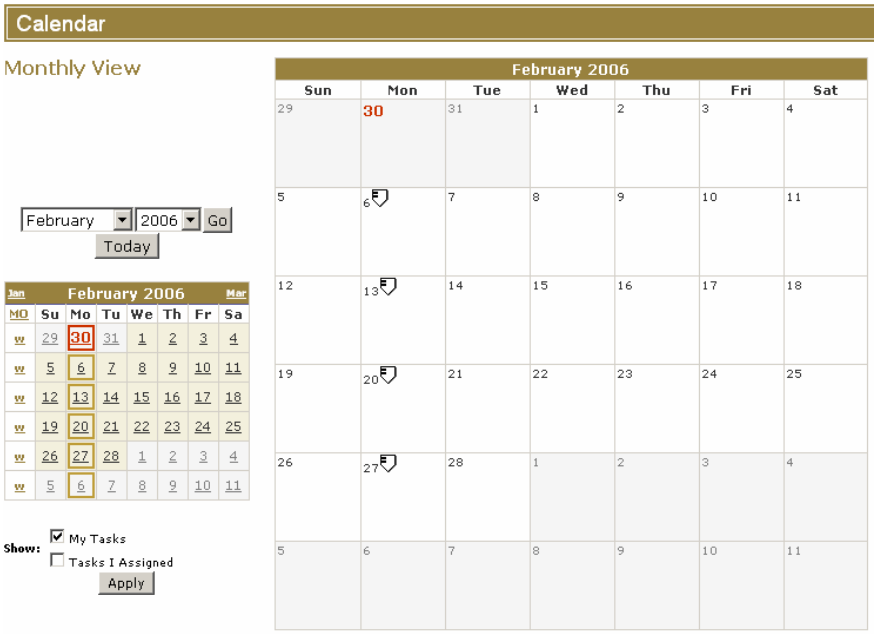


The default view of the calendar is the Daily View. Days with boxes on the small inset calendar have scheduled tasks. A red border indicates an overdue task. The daily agenda is shown on the right.

The Monthly calendar view is useful for viewing your upcoming task schedule.

2 To see a monthly overview of tasks, click the MO link in the small inset calendar.

A large monthly calendar appears on the right. Task icons indicate a task scheduled for a date. Hold the cursor over a task icon to see a summary of the task. A red border also indicates overdue status.



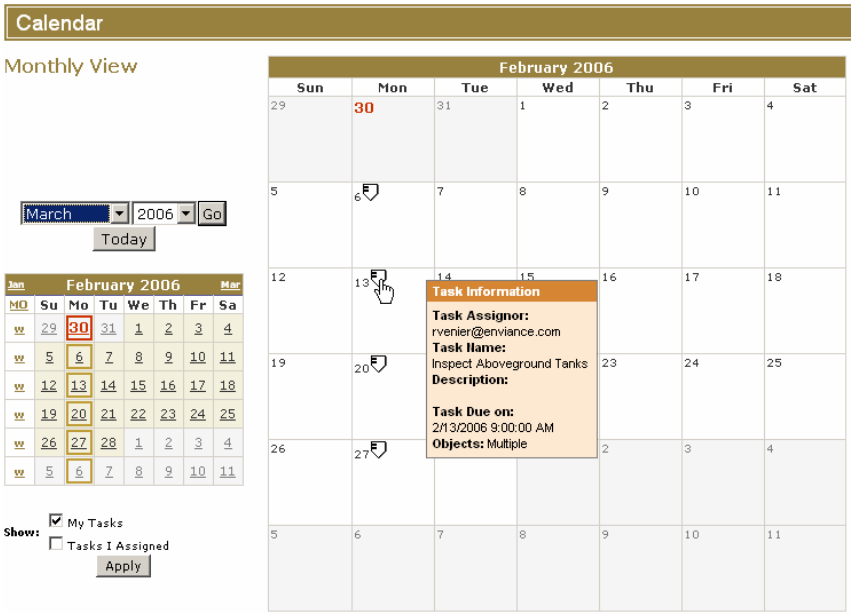
By default the calendar only shows tasks assigned to the user logged in.

If you are a task manager, check Tasks I Assigned to see tasks you've assigned to others. Task icons are yellow for tasks you've assigned.

To see all tasks you have permission to view, regardless of assignee or assignor, check Tasks I May View.

To view a specific month, select the month from the dropdown list at the top and click Go. Click Today to reset to today's date.

To see a summary of a task, hold the cursor over the task icon in the calendar. Click on the task icon to open the task completion form.



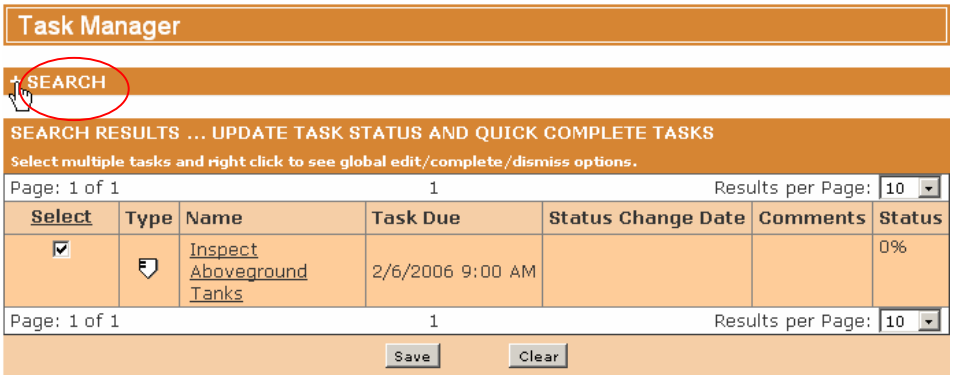
Search For and Complete Recurring Tasks

Many tasks have a recurring schedule, such as a weekly inspection log or monthly reporting task. When you complete a task with a recurring schedule it is important that you complete the correct instance of the task. Since by default in Task Manager you see tasks due from today forwards, if the task is past due, you must use the task search function to find the correct instance.

> **Note:** If you use the link in a task email reminder, you will automatically be directed to the correct task instance, and do not need to use the task search.

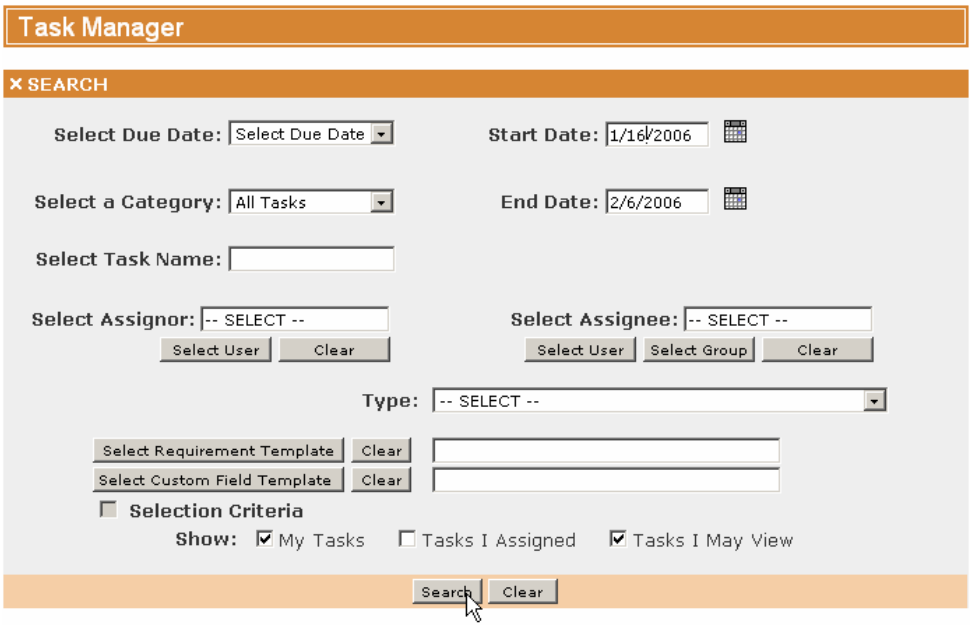
To search for recurring tasks:

1 In Task Manager, expand the Search pane by clicking the plus sign (+) in the Search bar.



2 In the Search pane, set the Start Date and the End Date to include the period for which you want to view task instances.

Alternately, you can use the drop down list in the "Select Due Date" field to select a time period. The Start and End dates are then automatically completed.



If you want to view tasks assigned to others, also check "Tasks I May View" or "Tasks I Assigned."

3 Click Search.

The results show all tasks due within the chosen period.

SEARCH RESULTS ... UPDATE TASK STATUS AND QUICK COMPLETE TASKS

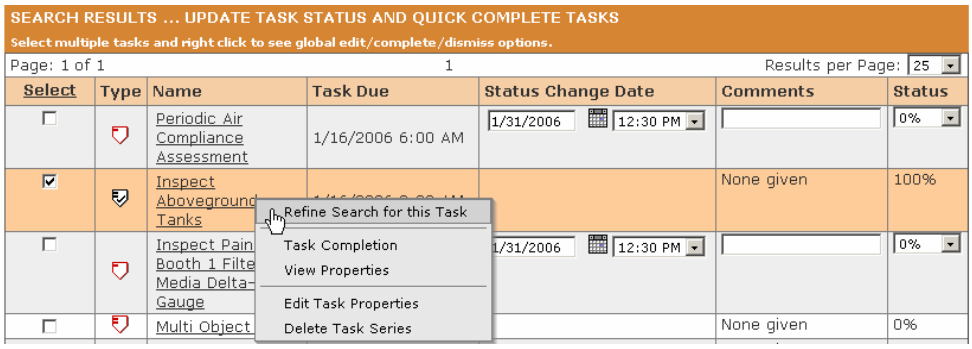
Select multiple tasks and right click to see global edit/complete/dismiss options.

Page: 1 of 1 1 Results per Page: 25

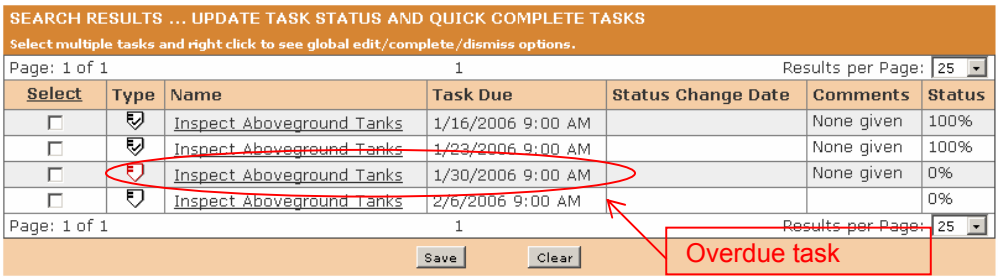
Select	Type	Name	Task Due	Status Change Date	Comments	Status
☐		Periodic Air Compliance Assessment	1/16/2006 6:00 AM	1/31/2006 12:30 PM		0%
☐		Inspect Aboveground Tanks	1/16/2006 9:00 AM		None given	100%
☐		Inspect Paint Booth 1 Filter Media Delta-P Gauge	1/17/2006 10:00 AM	1/31/2006 12:30 PM		0%
☐		Multi Object Task	1/20/2006 2:30 PM		None given	0%
☐		Inspect Aboveground Tanks	1/23/2006 9:00 AM		None given	100%
☐		Inspect Paint Booth 1 Filter Media Delta-P Gauge	1/24/2006 10:00 AM	1/31/2006 12:30 PM		0%
☐		Periodic Air Compliance Assessment	1/25/2006 6:00 AM	1/31/2006 12:30 PM		0%
☐		Confirm Safety Program	1/25/2006 12:00 PM	1/31/2006 12:30 PM		0%
☐		Inspect Aboveground Tanks	1/30/2006 9:00 AM		None given	0%

This list may include other tasks that are assigned to you, in addition to the recurring task you wanted.

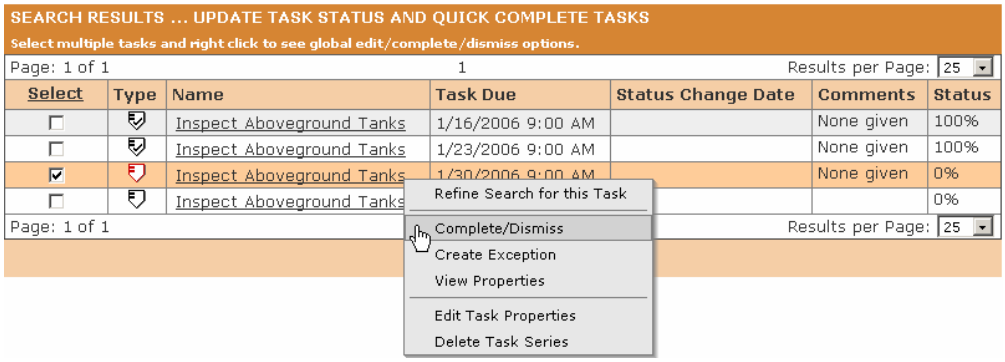
4 To further narrow the results for instances of a specific recurring tasks, right click the task name (of any instance of the task) and choose "Refine Search for This Task" from the menu.



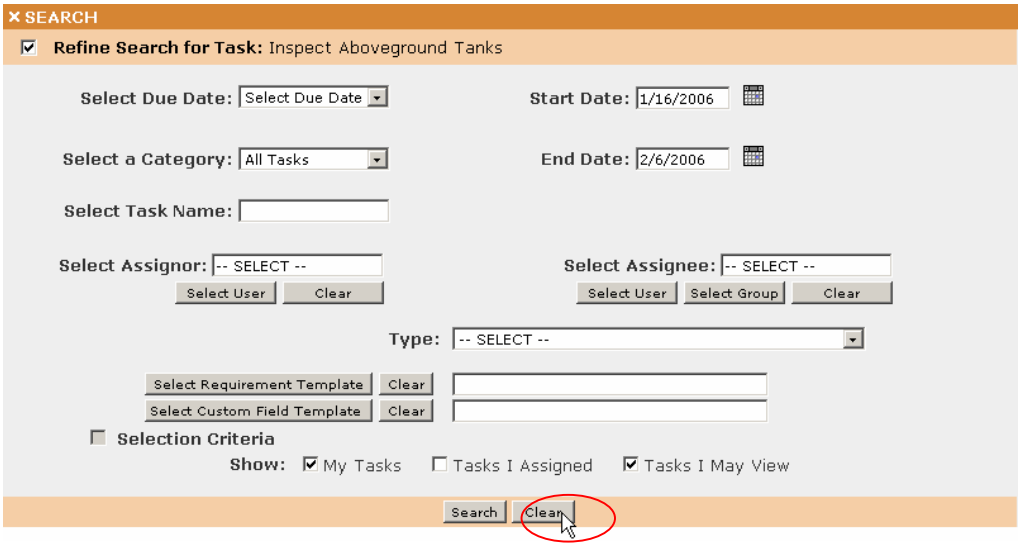
The results are then filtered to show all the instances of the recurring task within the chosen period.



Select the task that you want to complete, noting the task due date, by clicking on the task link, or right click and choose Comple/Dismiss.



Note: The task search criteria you set remains for the rest of your login session, anytime you return to Task Manager. If you want to clear the task search criteria, click Clear in the Search pane.



The Search criteria are returned to the default (today's date for the Start Date and My Tasks only).

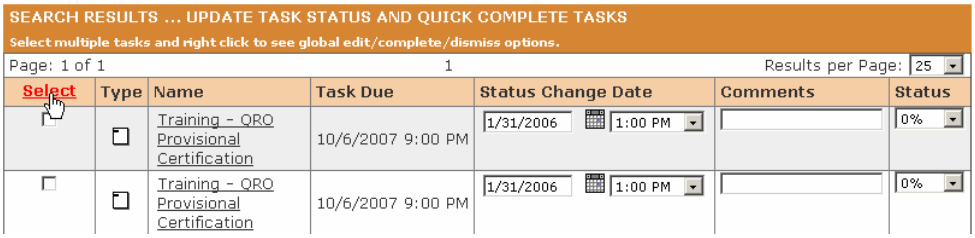
Complete Many Tasks at Once

If you have a number of tasks to complete with identical information, you can use the Global Complete/Dismiss functions to complete them all once. When you use these functions, all the selected tasks are completed with the same date and completion information.

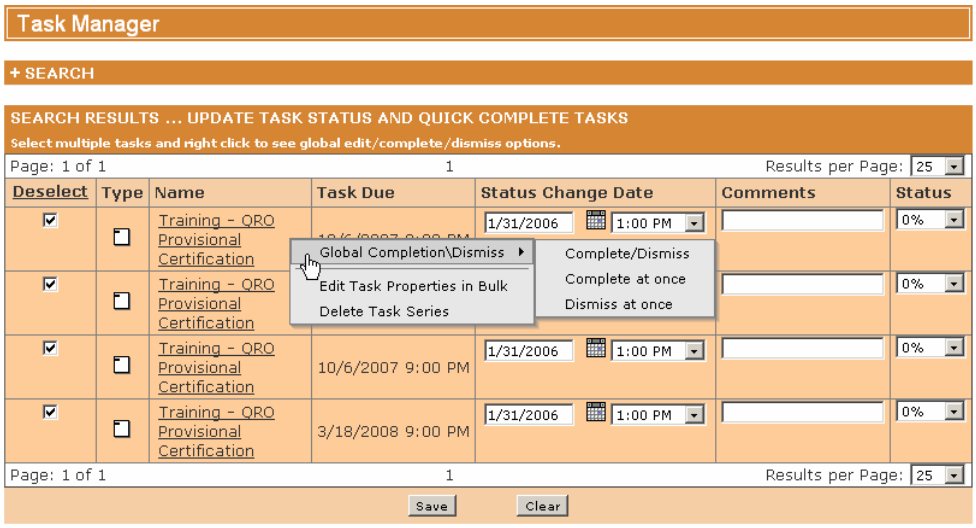
To complete several tasks at once:

1 First, use the Task Search to find the tasks you want to complete, if necessary.

2 From the tasks results list, select the tasks you want to complete by checking the checkboxes.. You can also click Select in the column head to select all tasks shown.

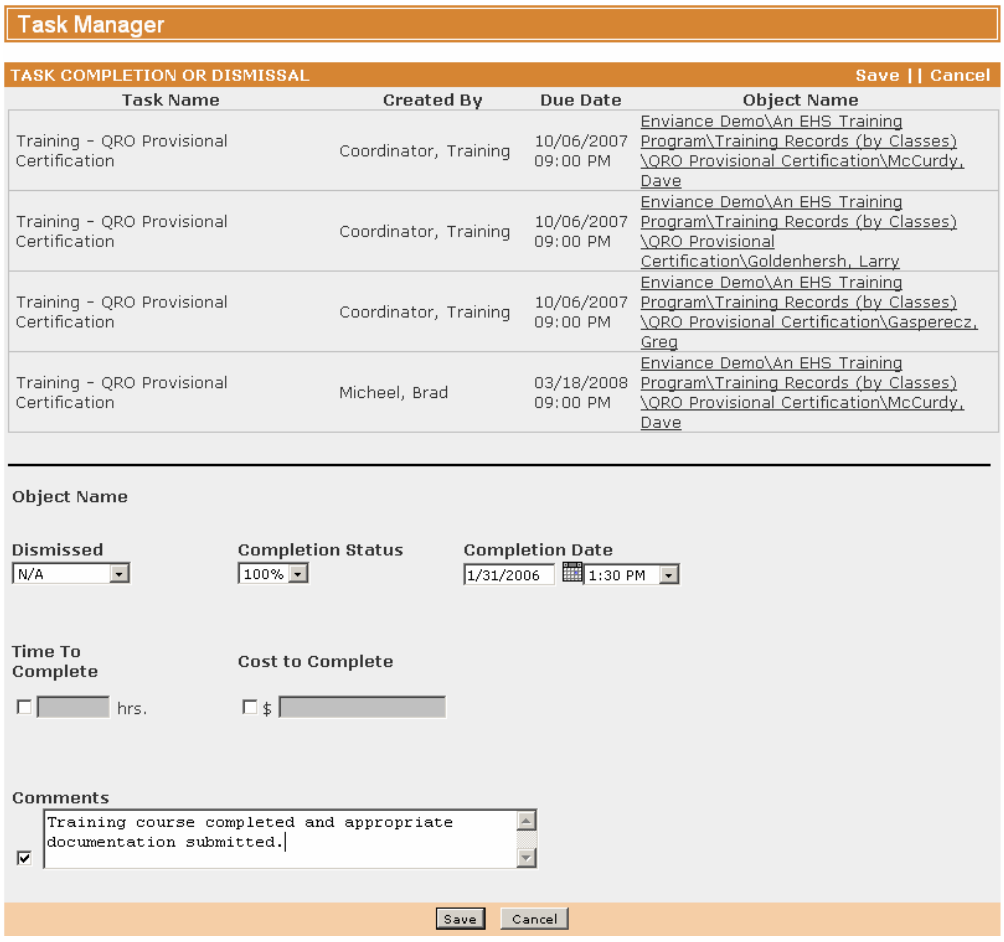


3 Right click any of the selected tasks.

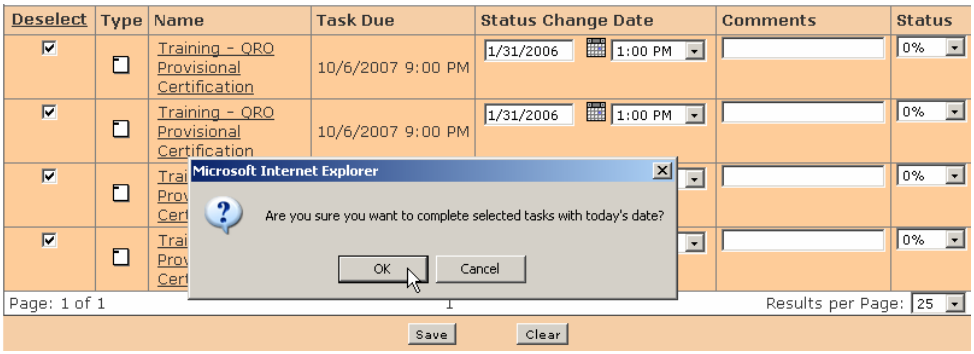


The right click menu shows three options for multiple task completion in the Global Complete/Dismiss submenu:

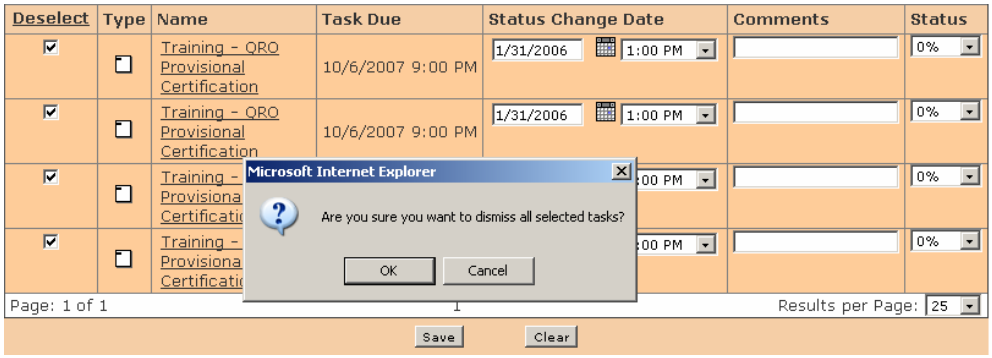
Complete/Dismiss: Choose this option to bring up the task completion form so you can enter the completion information to be applied to all tasks. Check the box to enter comments, or to use the Time to Complete and Cost to Complete fields.



Complete at Once: Completes all tasks immediately with today's date. No comments or additional information is included and other fields will be saved with defaults. You will be asked to confirm before saving.



Dismiss at Once: Dismisses all tasks immediately.



LESSON RECAP

- ⇨ You can log into the system from an email task notification and go directly to the task completion form.
- ⇨ To complete a task in the system, you must set the task completion status to 100% and save the task.
- ⇨ Tasks related to non-numeric requirements also have fields to document compliance in the task form.
- ⇨ A task related to multiple objects has sections for each object, which may be completed separately or all at once.
- ⇨ Overdue task notifications are issued by the system when a task is overdue.
- ⇨ You can view your task schedule from the Calendar.
- ⇨ To display multiple instances of a recurring task, use the Search pane in Task Manager to choose a time period.
- ⇨ You can complete several tasks at once with the Global Complete/Dismiss functions.

Managing Tasks

The Enviance System automates and improves the management of all your organization's compliance-related tasks. Automatic email notifications and escalation procedures help ensure all deadlines are met.

Task managers can easily create and assign an unlimited number of compliance tasks, set schedules, send automated task reminders, and collect audit-specific information such as time and cost required to complete tasks. Upon logging into the Enviance System, the user readily sees what tasks are on his or her immediate schedule. Managers also see the status of any tasks they've assigned, with overdue tasks flagged for attention.

Several types of Task Reports are available to help manage and review task status and obtain performance metrics across the organization.

OBJECTIVES

When you have completed this lesson, you will know how to:

- ⇨ Find and view tasks from Task Manager
- ⇨ Create and assign a task
- ⇨ Set up a task recurrence schedule
- ⇨ Set up task notifications
- ⇨ Set up a task template for an automatically triggered task.
- ⇨ Run a task report

View Tasks for an Object

Tasks may be associated with any item in the System Model (Facility, Unit, POI, or Requirement). Task information, such as task description, due date, status, and completion time is tracked within Task Manager.

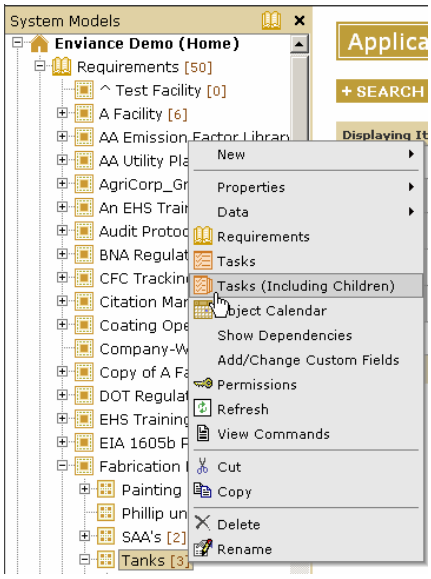
You can filter for tasks related to specific system model objects. There are two ways to do this:

- View object-related tasks from a system model object in Task Manager. This gives you full search capability for tasks.
- View the Object Calendar for an object. This is an easy way to find a task by date, or get an overview of tasks for a month.

View Object-Related Tasks in Task Manager

To view object-related tasks in Task Manager:

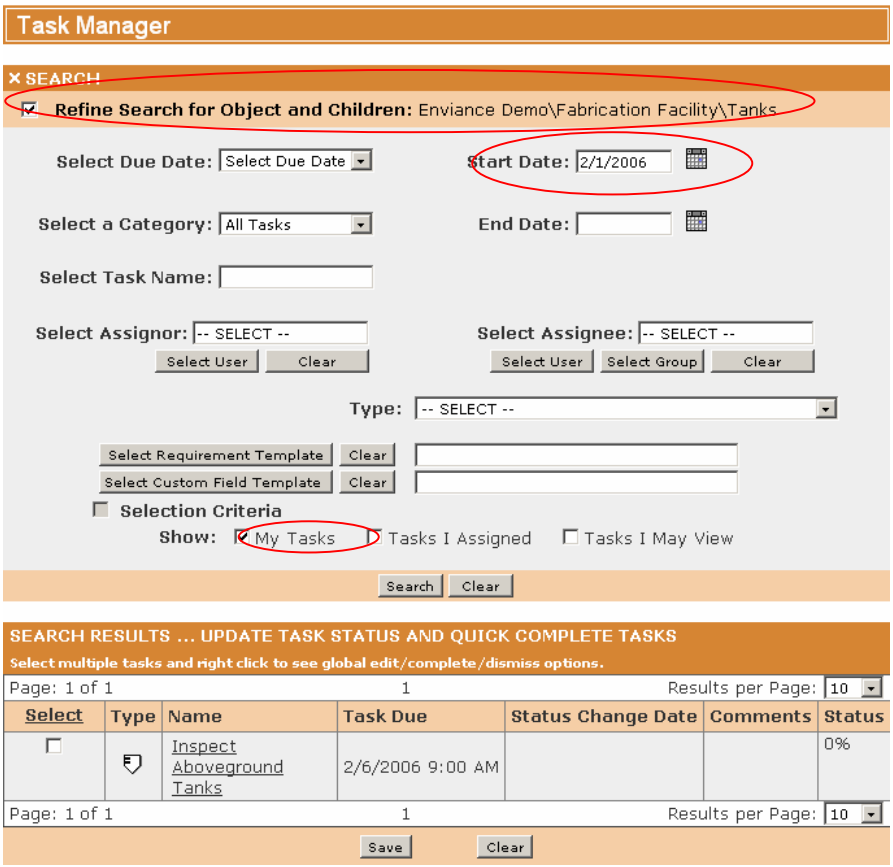
1 Right click the object and choose either Tasks or Tasks (Including Children) from the popup menu.



Task Manager shows all the tasks related to the facility, unit or POI (and its children, if this option is selected).

2 Expand the Search pane by clicking the plus sign in the Search bar.

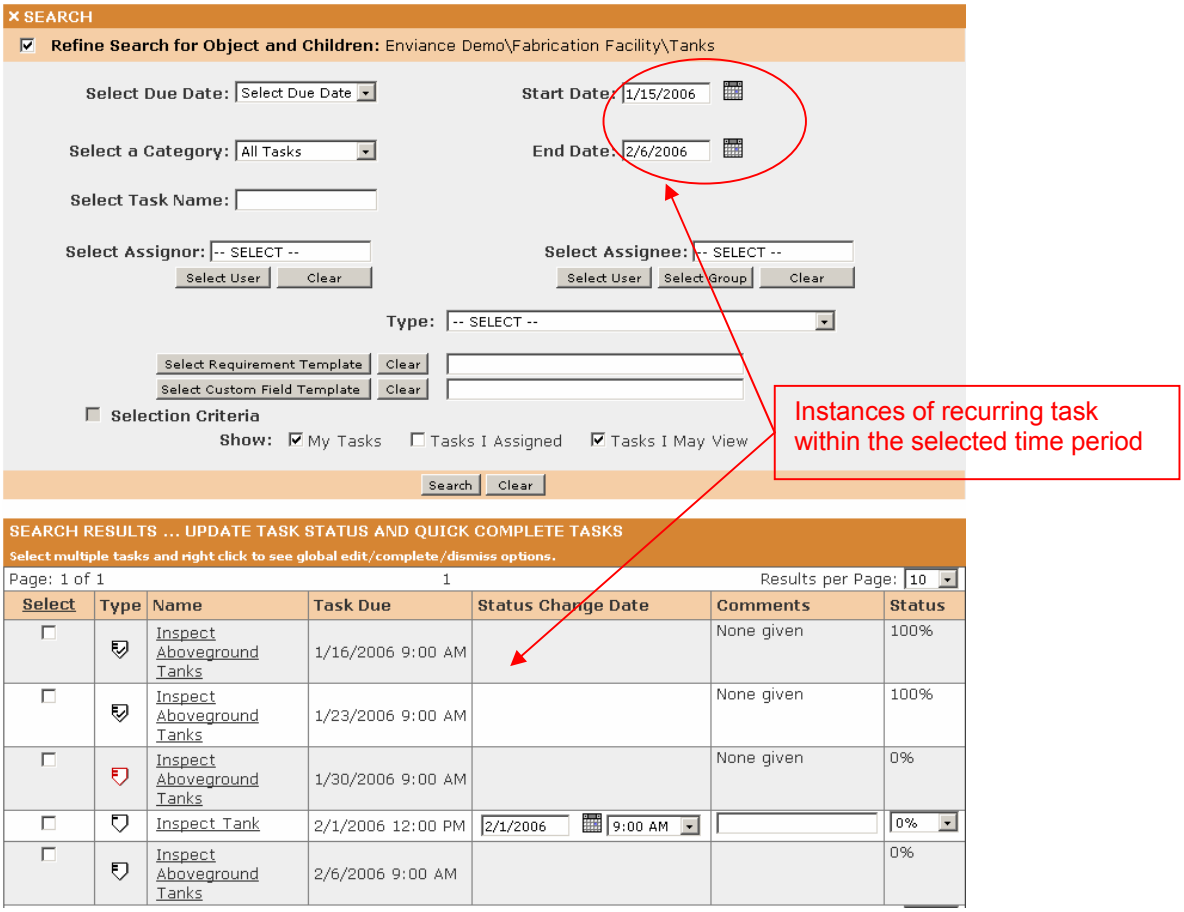
You can now see the filter that is applied to the task list. By default the results are filtered for those for which the user is the assignee, with due dates from the current date.



3 To change the filter criteria, set the Start Date and the End Date to include the period for which you want to view tasks. Alternately, you can use the drop down list in the "Select Due Date" field to select a time period (one to four weeks). The Start and End dates are then automatically completed.

If you set a Start Date only, you will see only the next occurrence of any recurring task. If you set both a Start Date and End Date, you see all instances of the task series.

If you want to view tasks assigned to others, also check "Tasks I May View" or "Tasks I Assigned."



Other available task search criteria includes:

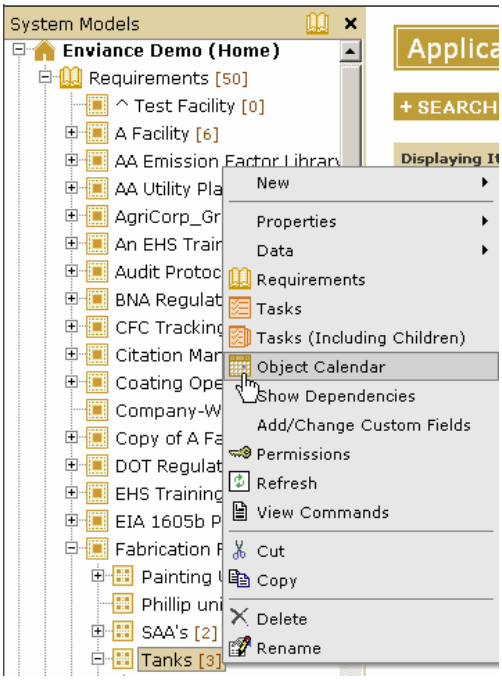
- Type (of related object): Choose the type of related object (Facility, Unit, Point of Interest, Event Log, or Requirement (general or specific requirement type)
- Requirement Template: If the related object is a requirement, you may select the Requirement Template associated with the object.
- Custom Field Template: Select the Custom Field Template that is applied to the related object. You may also filter for specific values for custom fields by checking the Selection Criteria box. Custom fields on the template are then available for selection and entering values.

View Object-Related Tasks on the Object Calendar

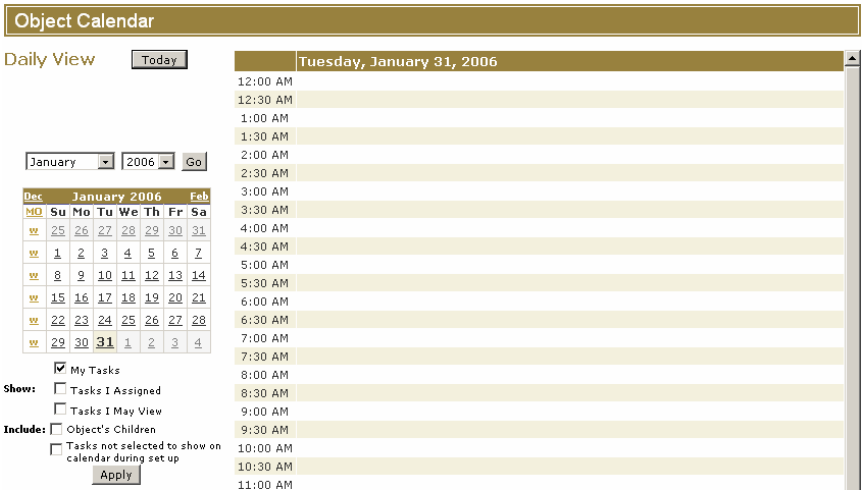
The object calendar shows all tasks related to a selected system object.

To display the Object Calendar:

1 Select an object (Facility, Unit or Point of Interest) in the System Model, right click and choose Object Calendar.



The calendar can be displayed in daily, weekly or monthly view. The initial default view is weekly, and tasks are filtered for those assigned to the user logged in.

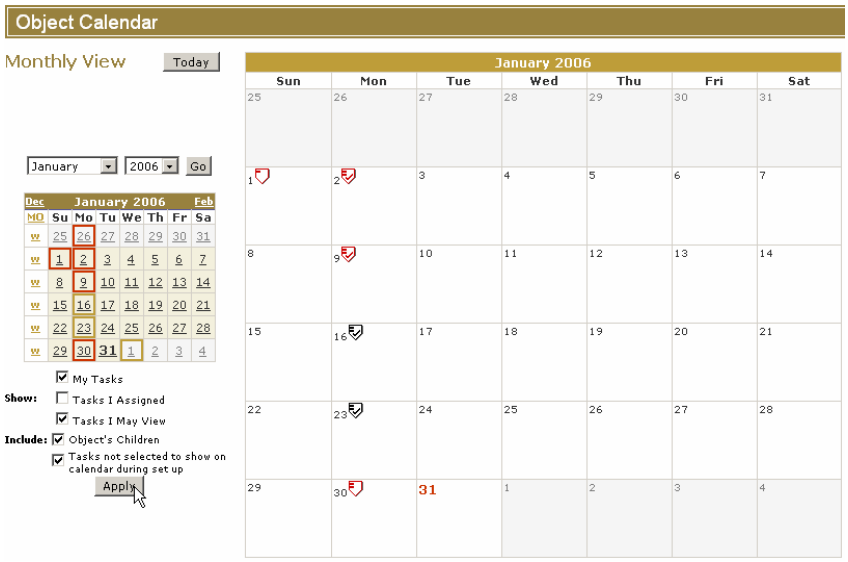


2 Click on the month link (MO) next to the days of the week on the calendar to change to the Monthly view.

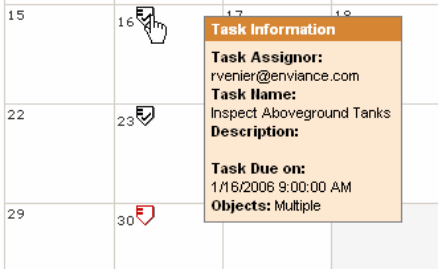
3 Choose other filter options under the calendar:

- To see tasks assigned to others than yourself, check Tasks I Assigned or Tasks I May View (includes those you assigned, as well as those assigned by others). The task you see will depend on your permissions in the system.
- Include tasks for child objects by checking the Object's Children box. You can also choose to show tasks that do not appear on the calendar by default because this option was not selected during task creation.

4 After selecting the filter options, click Apply to refresh the calendar display.



To View Task Information, hold the cursor over any of the Task icons that appear on the calendar to display the task summary. Clicking the icon takes you to the task completion form.



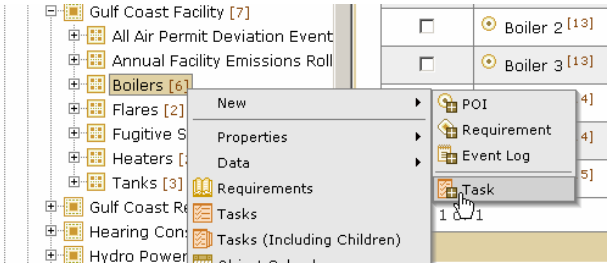
Create and Assign a Task

You may create a task for one or more requirements or objects in the System Model.

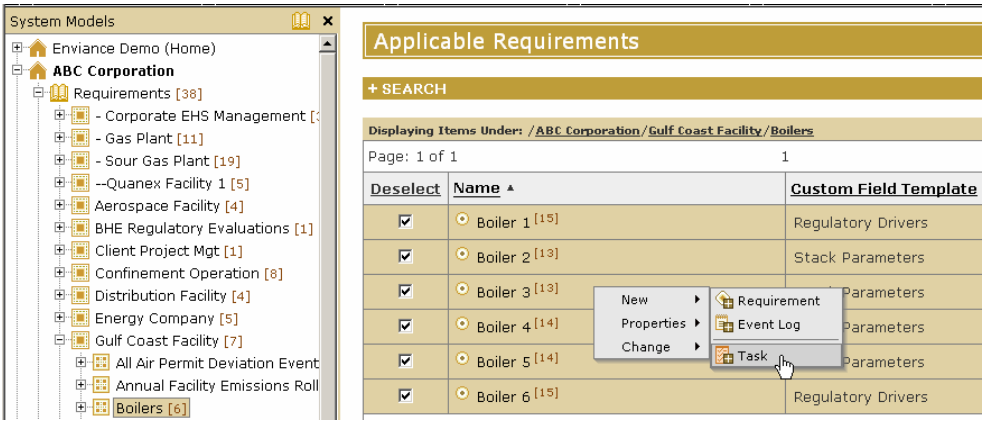
Right click the object with which the task is to be associated and choose New > Task.

For a system model object, you may select either from the system model tree or the Applicable Requirements view.

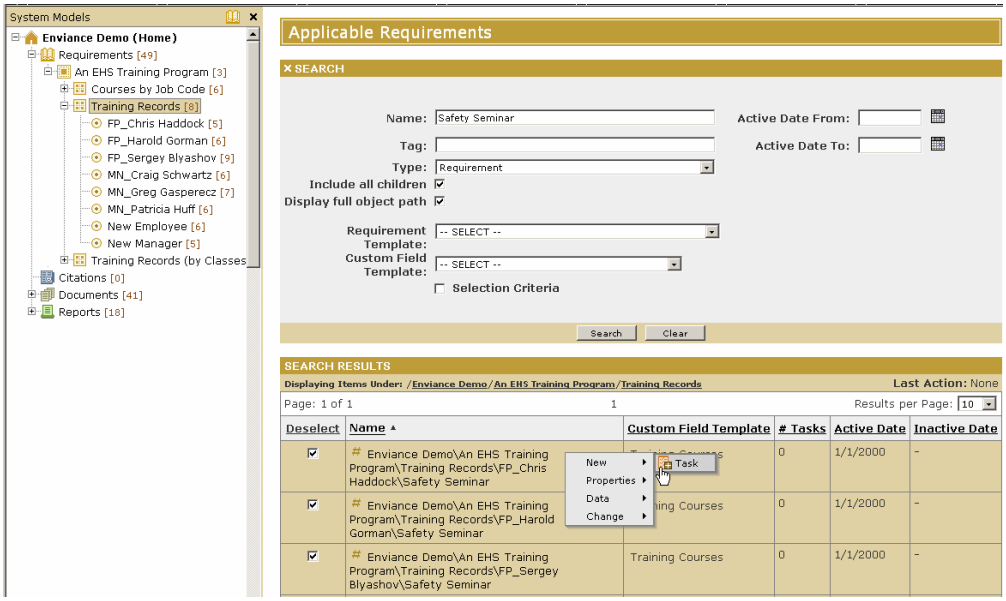
If you want to associate the task with a single object, you can right click the object in the Requirements tree.



If you want to associate the task with several objects, you need to first display the objects in the Applicable Requirements view by selecting a common parent object, then setting search criteria as necessary to display the desired objects. Select the objects by clicking the checkboxes, or click the Select column head to select all the objects displayed. After selecting the objects, right click anywhere in the table to display the menu.



If you want to associate the task with one or more Requirements, select the desired requirement(s) from the Applicable Requirements view in the same manner as above. If the requirements are under different parents, you will need to set search criteria to display the desired requirements first.



Tip: You can create a task for a single Non-numeric Requirement at the same time as you create the requirement by checking the Create Task box at the bottom of the properties form before saving. After the requirement has been saved, the task form will appear.

When you select the New Task option, the new task form appears. There are 3 parts to complete:

- General Properties: Includes Name, Task Description (instructions), Assignor, and Assignee(s). If the task is a one-time task, the due date is specified here; otherwise use the Recurrence tab to set up a recurring schedule.
- Recurrence: Use to specify the schedule for a recurring tasks.
- Notifications: Use to set up task notifications: when to send, to whom, and any additional comments.

To complete the task information:

1 Enter a Task Name and Description.

The description typically contains the instructions for the task

2 Select calendar options to specify the where you want the task to be displayed.

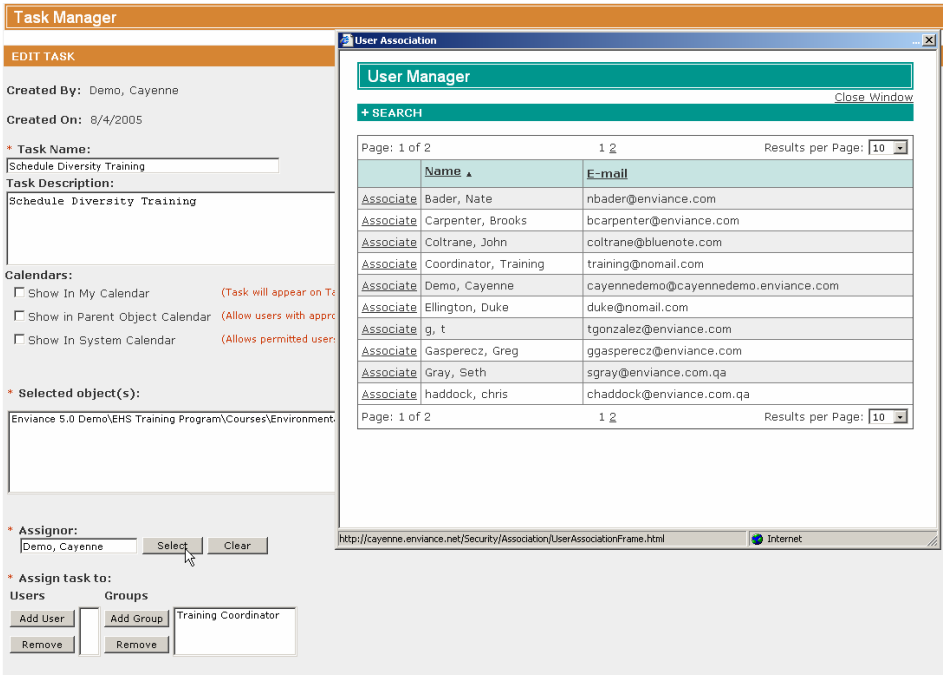
My Calendar: Select this if you want to see this task in your personal calendar, so you can view its status easily.

Object Calendar: Select this to display the task in the calendar for the object(s) it is associated with.

System Calendar: If the System Calendar option is selected, the task will appear in the calendar for the entire system. This allows multiple permitted users to be able to view a task that may be relevant to the whole system, such as an annual EPA audit. However, this option is not necessary for most tasks.

3 Select the Assignor and Assignee(s) for the task.

- Assignor: The user who creates the task is the default Assignor. To change the Assignor to another user, click the Select button and choose an Assignor from the selection window.



- Assignee: Click the Select button and choose one or more users from the selection window. If a Responsible User is designated for the object on its properties, this user is selected by default, but may be changed (see next section).

4 Select the Associate Document link to find a a document to associate with the task (for example, a procedural document or a checklist).

5 Set Due Date:

- If the task you want to set up is a one-time task only, you only need to specify the Due Date on this page. Then click Continue – Notifications to set up task notifications.. If you do not want to set up notifications, click Save to save the task and quit.

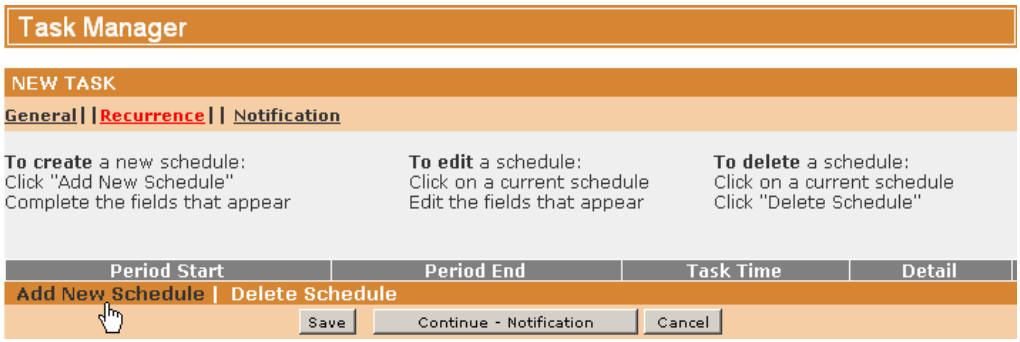
- For a recurring task, ignore the Due Date fields and click the Continue - Recurrence button to set up the recurrence schedule for the task.

Set Recurring Task Schedule

One or more schedules may be set up for a recurring task

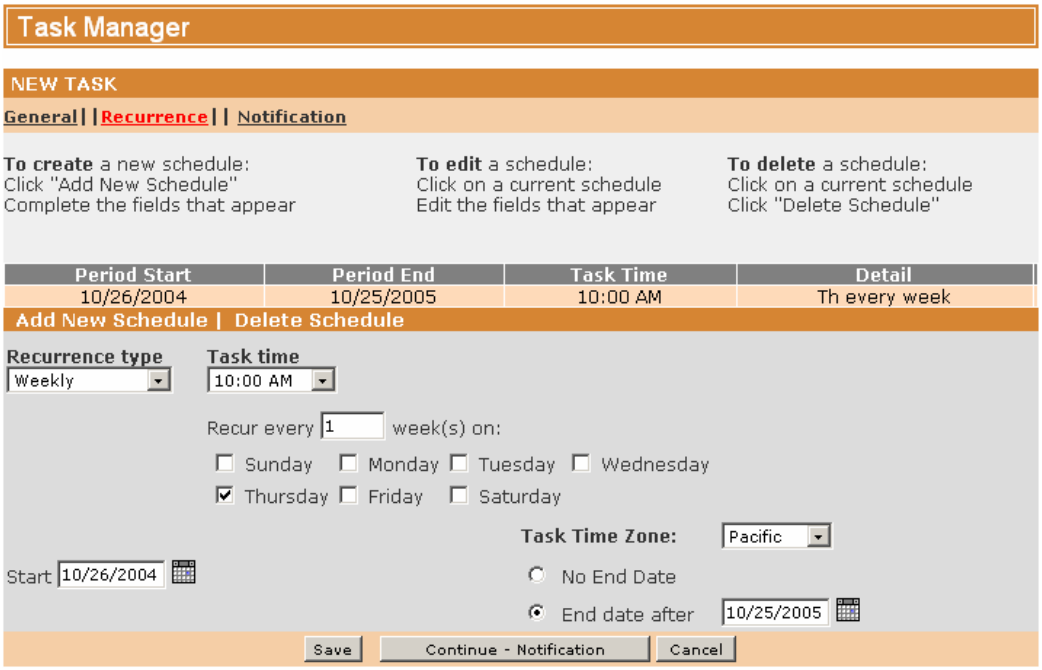
The following example shows you how to set up two schedules for a task: a weekly inspection and a quarterly inspection.

1 Click the Add New Schedule link to create a recurrence schedule for the task.



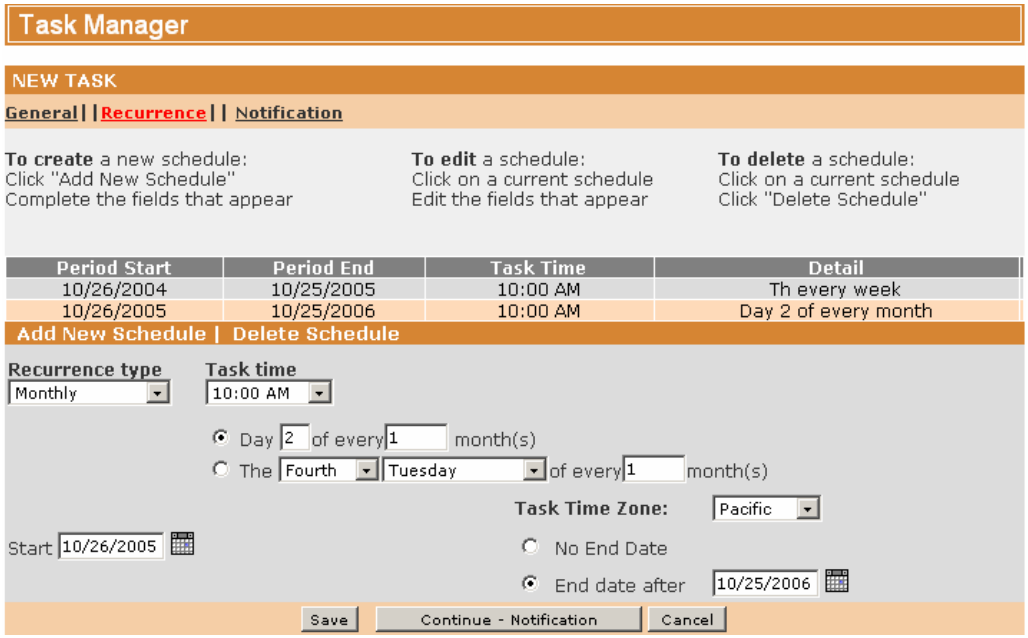
2 Choose the Weekly Recurrence type and select the schedule day and time for the task. For example, 10 am on Thursday

You can select an end date, or choose No End Date for the task. You can also select a different time zone that applies to the task, if necessary.



3 Select Add New Schedule to create a second, quarterly task schedule. Select Monthly for the Recurrence Type. Enter Day 2 of every 3 months.

The two task schedules you've set up can be seen in the task schedule table above the setup options.



After setting up the recurrence schedule, click the Continue – Notifications to set up task notifications. If you do not want to set up notification, click Save to save the task and quit.

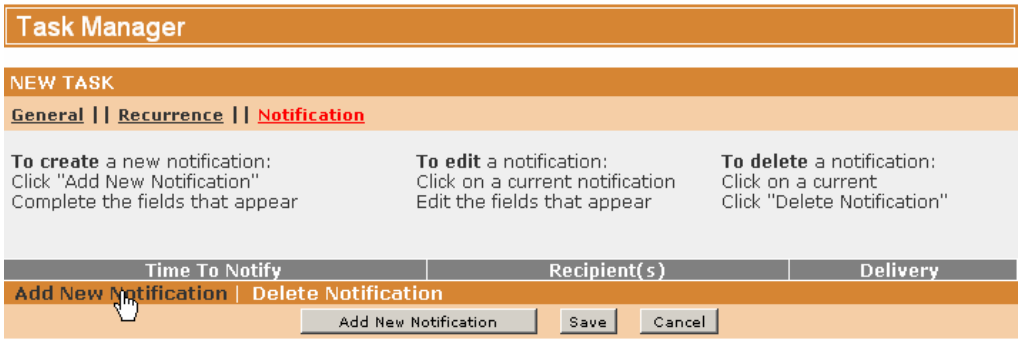
Specify Notifications for a Task

You can specify one or more notification schedules as needed. For example:

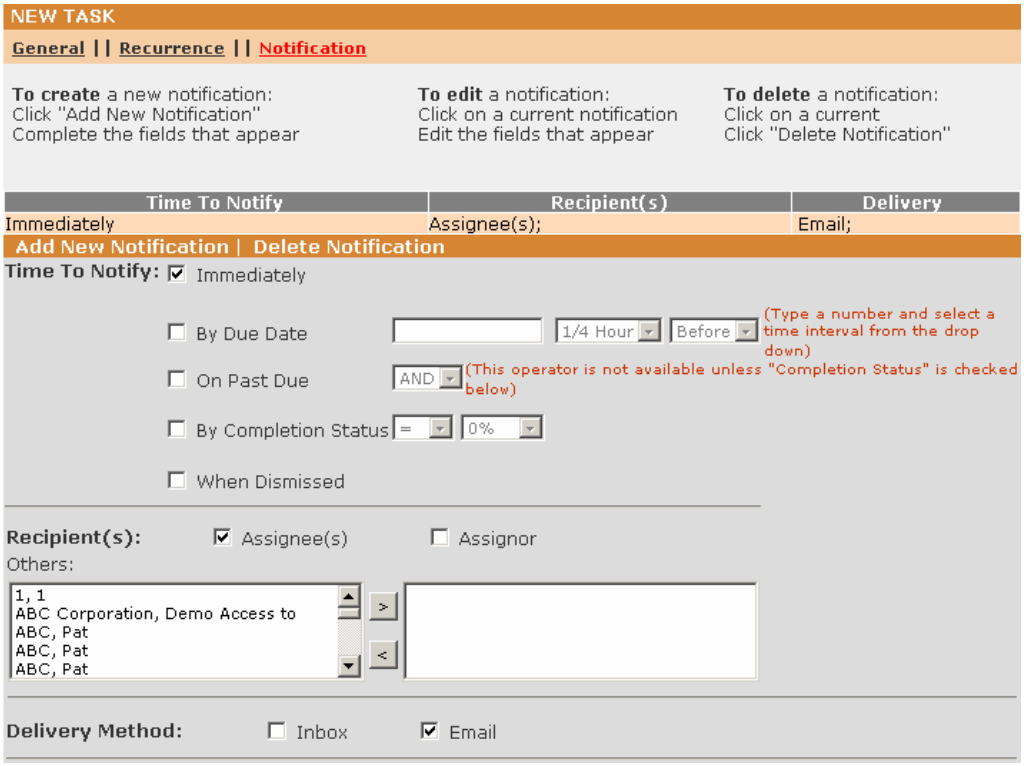
- Send an immediate notification to the task assignee(s).
- Send a reminder notification to the assignee(s) 2 days before the due date.
- Send a notification to the task assignor when the task is completed or is dismissed.
- Send a notification to both assignor and assignee, plus a supervisor, when the task is overdue.

The following example shows how to set up four different types of notification schedules for this task.

1 Click the Add New Notification link to create the first notification schedule.

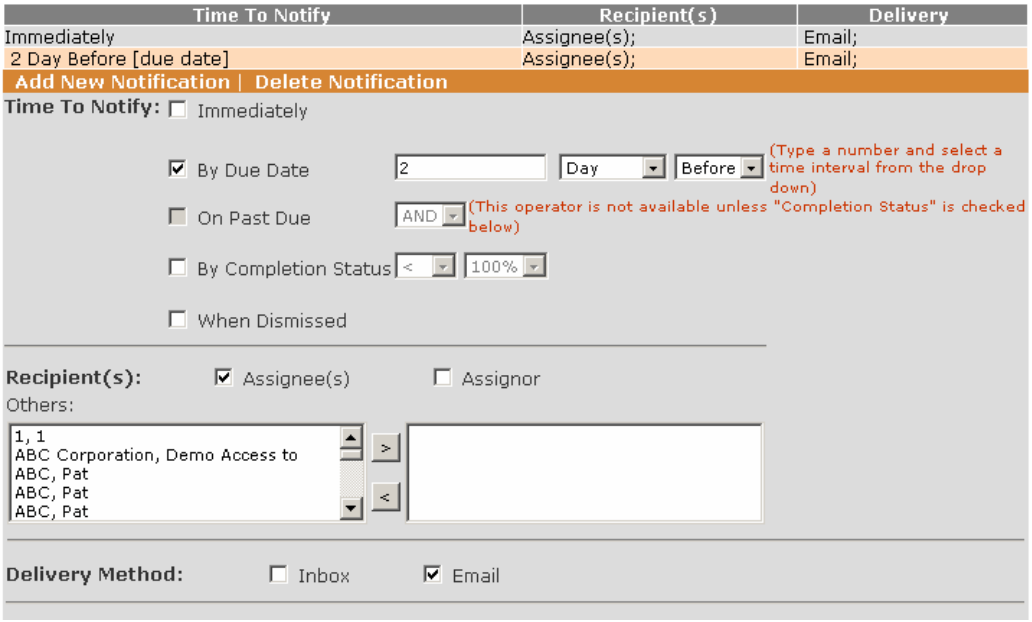


Select the checkboxes for Time to Notify: Immediately and Recipients: Assignee(s). For Delivery Method select both Email and Inbox.



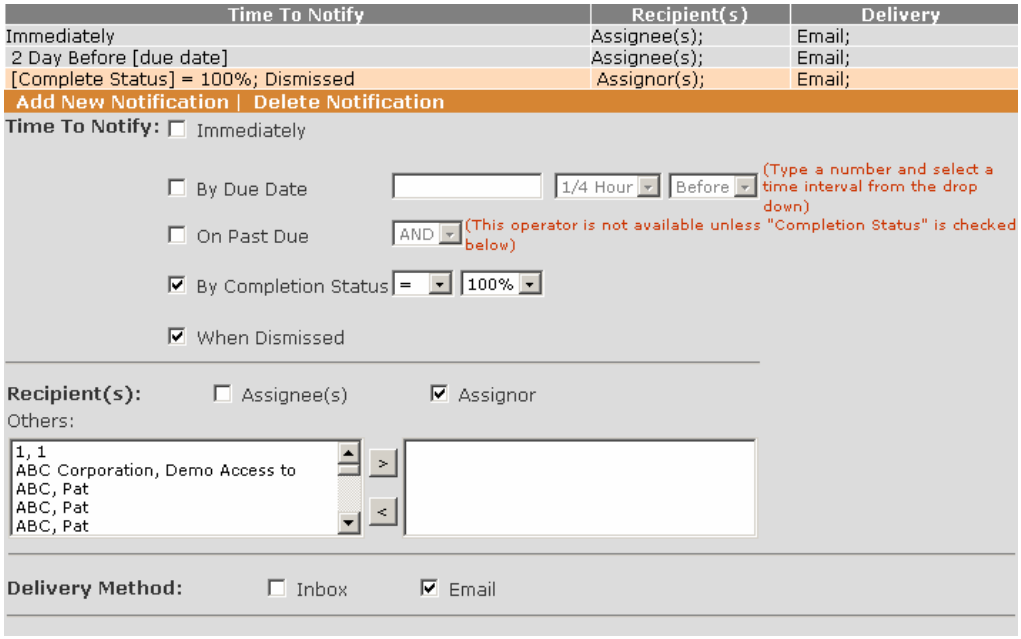
2 Click Add New Notification again to set up the second notification. This will be a task reminder email to be sent 2 days before the due date.

Select the Time to Notify: By Due Date checkbox and specify 2 Days Before in the adjacent boxes. Check Recipients: Assignee(s) and Delivery Method: Email.



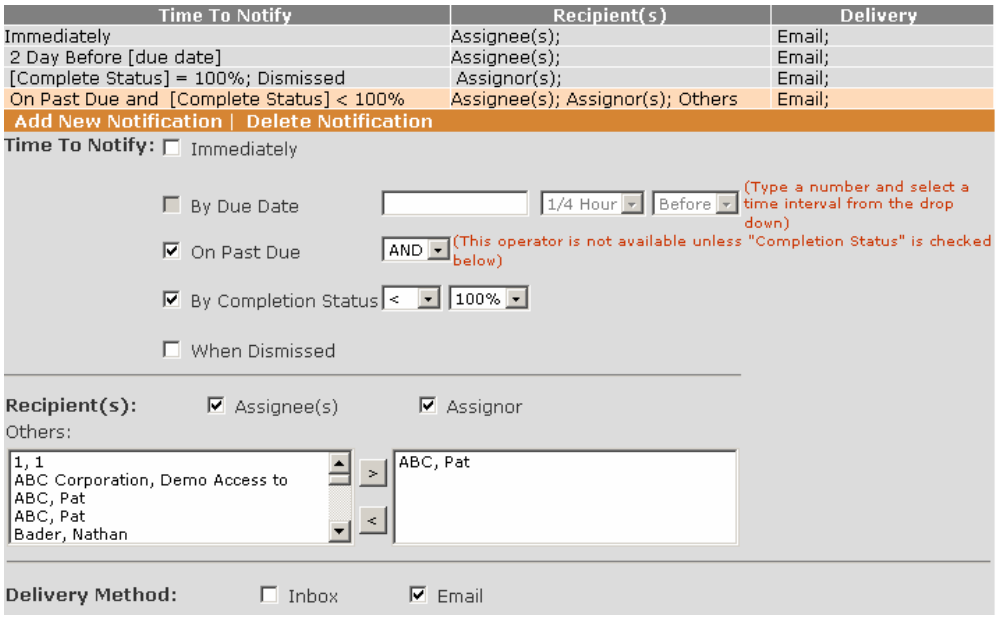
3 Select the Add New Notification link again to set up a notification to the task assignor when the task is completed or is dismissed.

Select Time to Notify: Check By Completion Status and specify =100%. Also select the When Dismissed box. Select Recipients: Assignor and Delivery Method: Email.



4 Click Add New Notification again and set up the overdue notice as follows:

Check On Past Due. Check By Completion Status and specify < 100%. Check Assignee and Assignor. From the Others list select a user name and click > to add it to the right pane to send an additional notification to this person. For Delivery Method, check Email.



Review the four notifications you've set up in the notifications summary table above the setup options.

5 Click the Save button to complete the setup of this task.

If you have assigned the task to yourself, you should now be able to see the task in your calendar.

Click the Calendar button and find the task on your Calendar.

Then find and view the task from the Object Calendar.

Task Templates

Task templates are used to create automatically triggered tasks based on system events.

Task templates are used in the following instances:

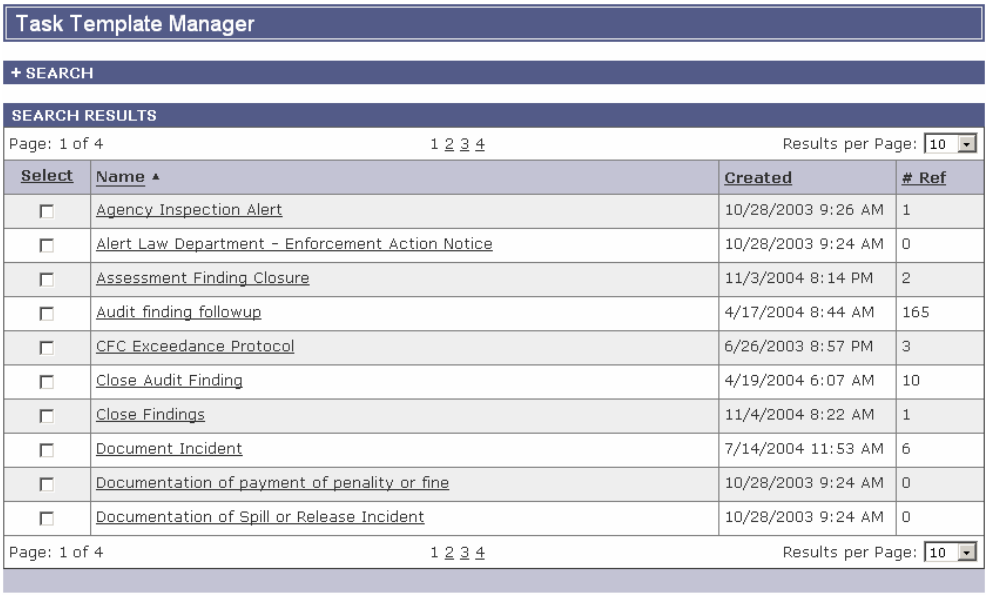
- When applied to a Numeric Requirement that has regulatory or internal limits or both, a task is triggered whenever a data point is added in the system that exceeds the specified limit.
- When applied to an Event Log that monitors a Numeric Requirement, a task is triggered whenever data exceeds the regulatory or internal limit.
- When applied to an Event Log that monitors a Non-numeric Requirement, a task is triggered whenever an event instance is created. For a manual log, this is when a new log entry is made. For an automatic log, this is whenever a task is completed with the compliance status Not Determined.

Creating a task template is similar to creating a simple, non-recurrent task. However, Assignees and Assignor are specified on the Requirement or Event object that uses the task template. The due date of the task is relative to the incident that triggers it.

To view existing task templates:

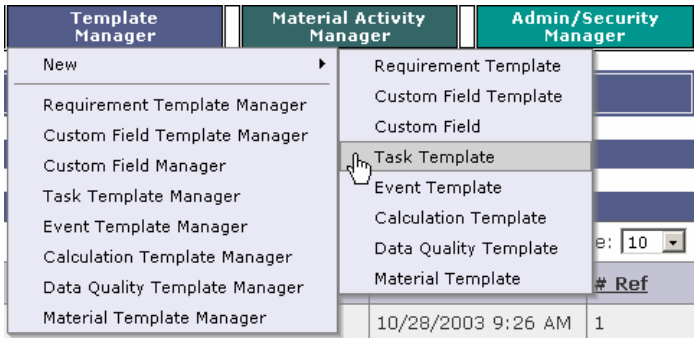
1 Select Template Manager > Task Template Manager

2 Task Template Manager shows a list of task templates already in the system.



To create a new task template:

1 Select Template Manager > New > Task Template.



2 Enter a Task Name and Description.

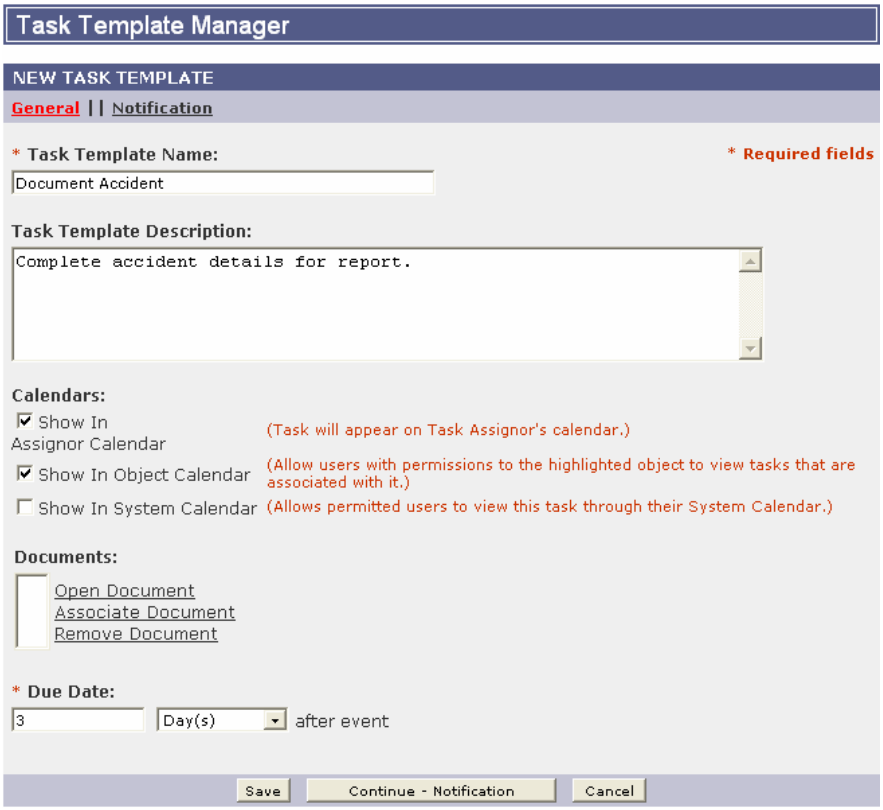
The description typically contains the instructions for the task.

3 Choose the calendars you want the task to appear in.

4 Add an associated document, if you wish.

5 Specify the due date, relative to the event that triggers the task.

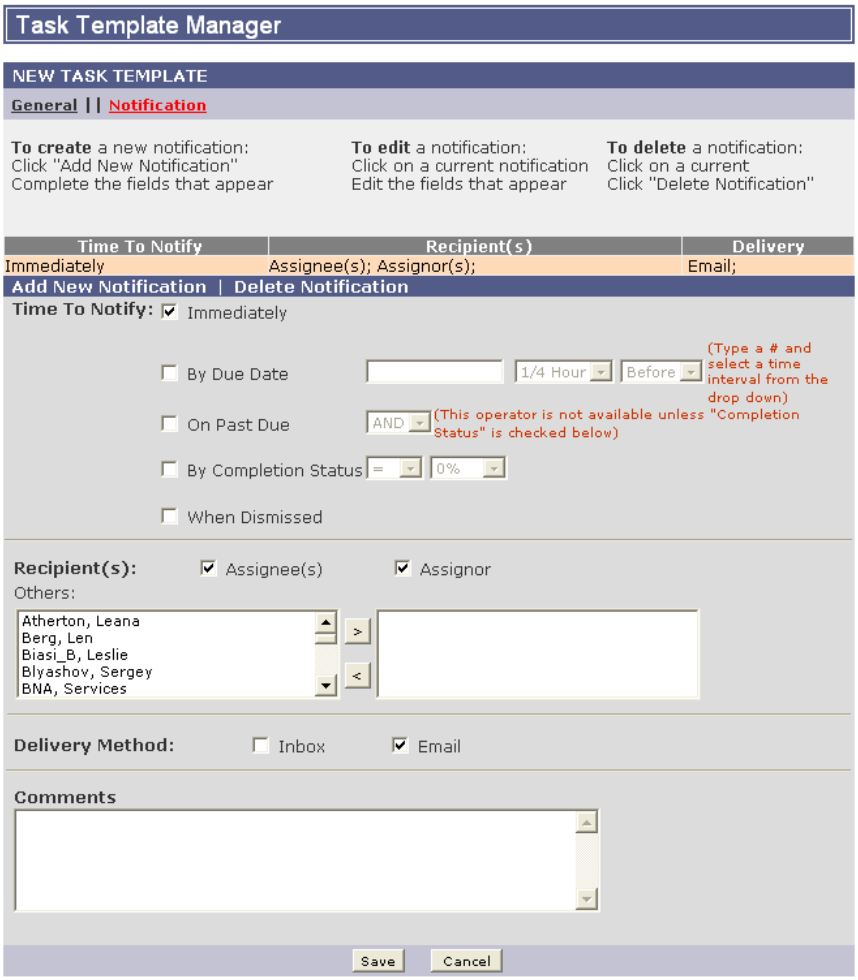
Choose ½ Hour(s), Hour(s), Day(s), Week(s), Month(s) or Year(s) from the list and enter the appropriate number. For example, if you choose 3 Day(s), the task due date will be 3 days after the event that triggered the task.



6 Select Continue – Notification.

7 Click Add New Notification.

8 Set up notifications as desired. For example, in order for the assignee to be notified immediately when the task is triggered, you should set up an Immediate notification.

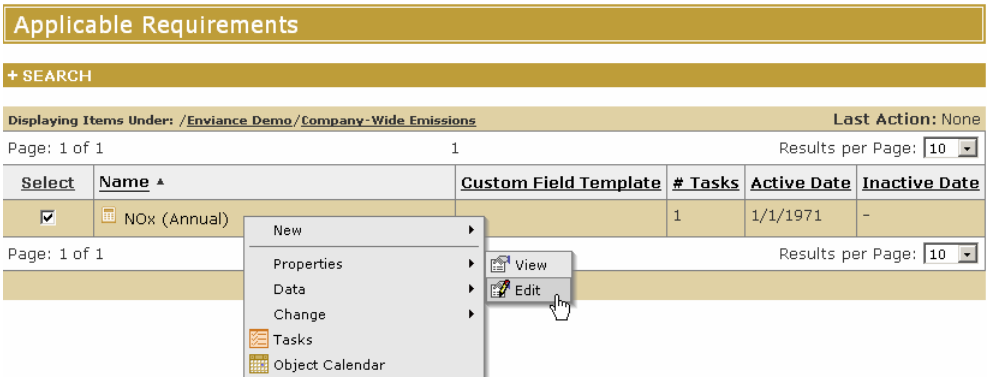


9 Select Save to save the task template.

They may be applied to Event Logs or Numeric Requirements.

To apply a task template to a Numeric Requirement:

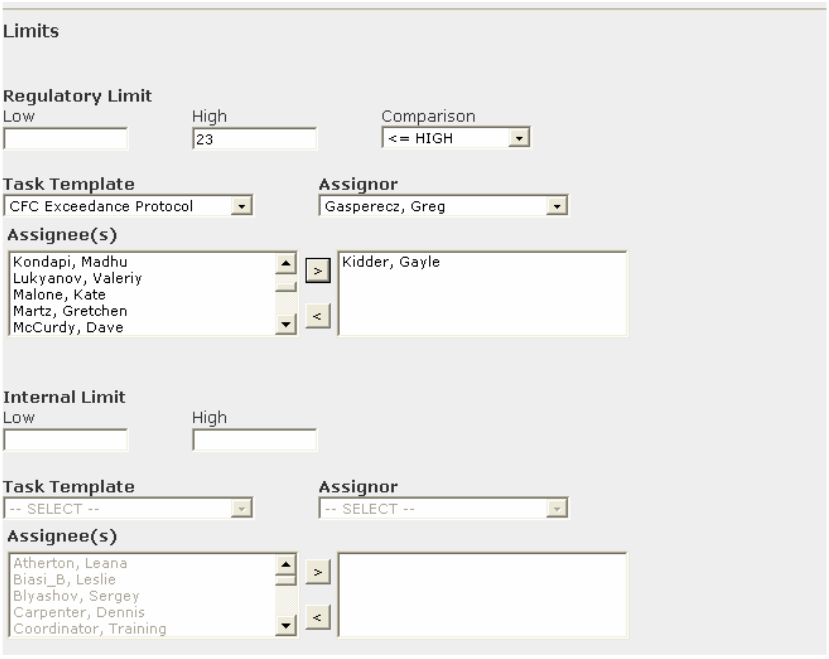
1 Right click the Numeric Requirement in the Applicable Requirements view and choose Properties > Edit.



2 Scroll down to the Limits section on the properties.

3 Specify a Regulatory Limit for the requirement. Then choose a task template from the list.

4 Select an Assignor and Assignee(s) for the task.



Note that you can apply a task template to both the regulatory limit and the internal limit. You can use the same or different task templates for each limit.

To apply a task template to an Event Log that monitors a Numeric Requirement:

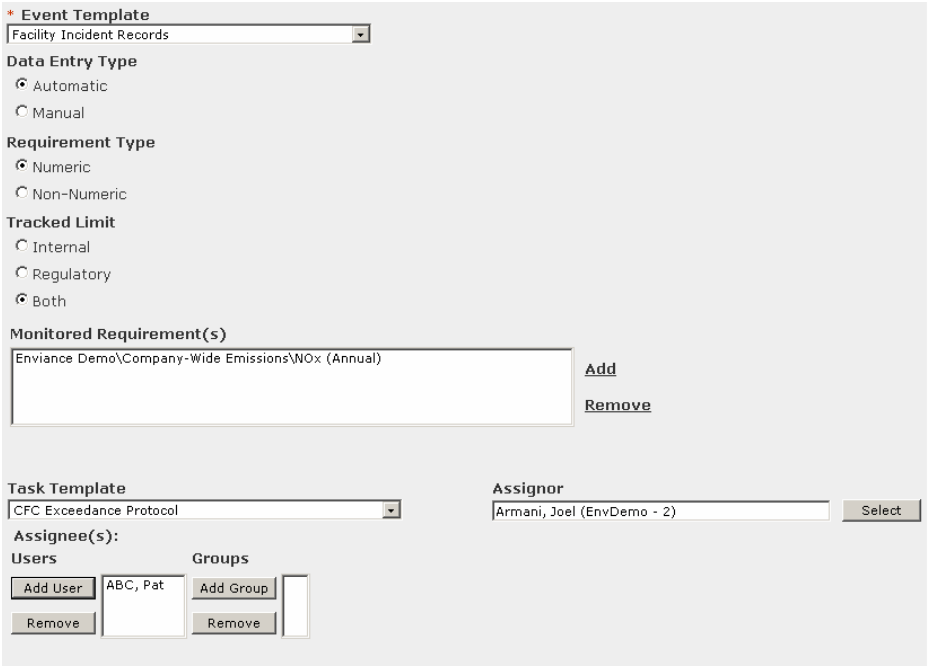
1 In the Event Log properties, select the Event Template.

2 For the Data Entry Type, select Automatic.

3 For the Requirement Type, select Numeric.

4 For the Tracked Limit, select which limit you want to track: Regulatory, Internal or both.

5 Select Assignor and Assignees for the task.



To apply a task template to an Event Log that monitors a Non-numeric Requirement:

1 In the Event Log properties, select the Event Template.

2 For the Data Entry Type, select either Automatic or Manual.

A manual event log has entries created manually as needed. An automatic event log will create event instances whenever a task is completed with compliance status Not Determined.

3 For the Requirement Type, select Non-Numeric.

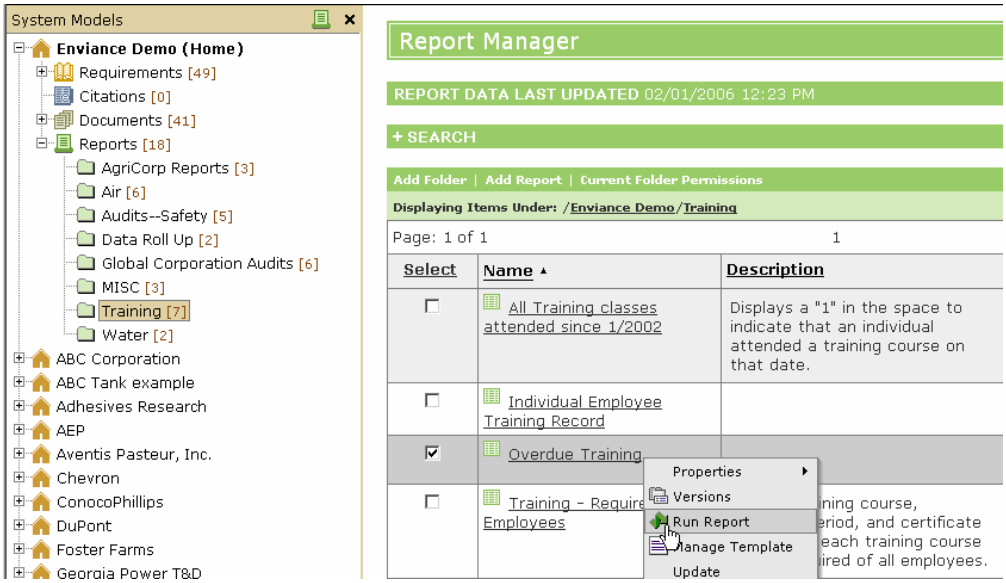
4 Select Assignor and Assignees for the task.

Run a Task Report

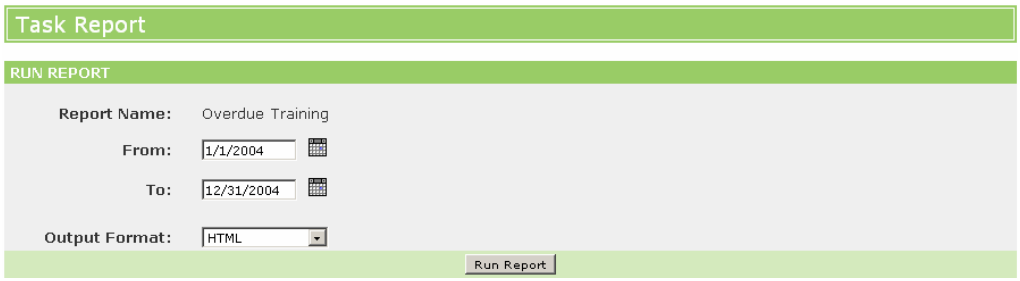
Task Reports provide an easy way to monitor and manage task activities. The data generated by Task Manager can be output in a report to help you more effectively manage your operation.

1 In the Reports tree, open the folder that contains the report you want to run, or use the reports search to find the report.

Right click the report in the reports list and choose Run Report.



2 Choose the desired output format and change the date range as desired. Then click the Run Report button to generate the report.



If you choose HTML format, the report can be viewed immediately online. If you choose Excel format, the report will be exported to an Excel file which can be opened or saved after the report is run.

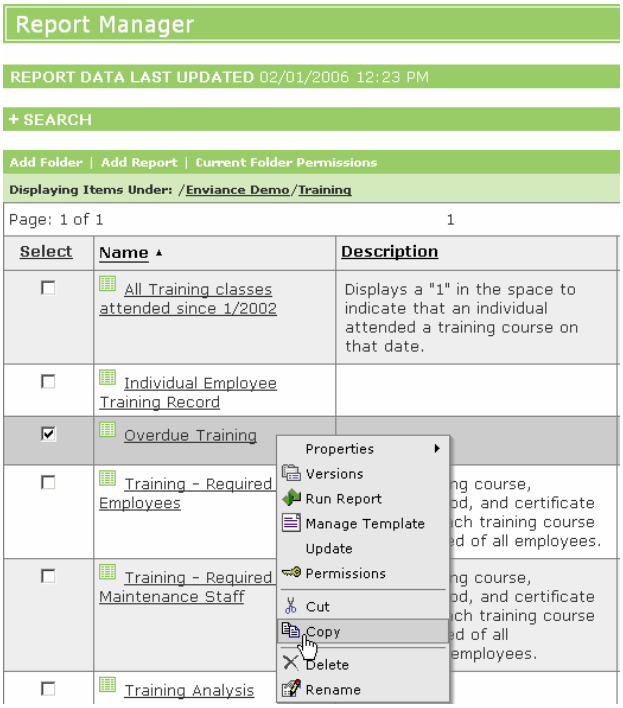
Task Report

Requirement Name	Task Name	Task Due Date
Chicalo, Mike	Training - ISO 14001 Awareness	01/16/2004 09:00 PM
Chicalo, Mike	Training - Hearing Test	01/22/2004 09:00 PM
Chicalo, Mike	Training - Environmental Operations Manual	06/17/2004 09:00 PM
Gasperecz, Greg	Training - ISO 14001 Awareness	01/16/2004 09:00 PM
Gasperecz, Greg	Training - Hearing Test	01/22/2004 09:00 PM
Gasperecz, Greg	Training - Neighbor Complaint Response	03/09/2004 09:00 PM
Gasperecz, Greg	Training - Environmental Operations Manual	06/17/2004 09:00 PM
Gasperecz, Greg	Training - Environmental Operations Manual	06/25/2004 09:00 PM
Goldenhersh, Larry	Training - ISO 14001 Awareness	01/16/2004 09:00 PM
Goldenhersh, Larry	Training - Neighbor Complaint Response	03/09/2004 09:00 PM
Huff, Pat	Training - ISO 14001 Awareness	01/16/2004 09:00 PM
Huff, Pat	Training - Hearing Test	01/22/2004 09:00 PM
Huff, Pat	Training - Environmental Operations Manual	06/09/2004 09:00 PM
Huff, Pat	Training - Environmental Operations Manual	06/17/2004 09:00 PM
McCurdy, Dave	Training - ISO 14001 Awareness	01/16/2004 09:00 PM
McCurdy, Dave	Training - Hearing Test	01/29/2004 09:00 PM
McCurdy, Dave	Training - Neighbor Complaint Response	03/09/2004 09:00 PM
McCurdy, Dave	Training - Environmental Operations Manual	06/25/2004 09:00 PM
Venier, Randy	Training - ISO 14001 Awareness	01/16/2004 09:00 PM
Venier, Randy	Training - Hearing Test	01/29/2004 09:00 PM
Venier, Randy	Training - Environmental Operations Manual	06/17/2004 09:00 PM

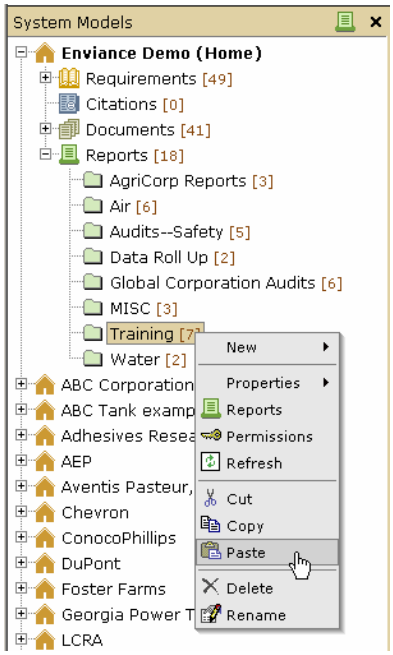
Edit a Task Report

You can create a new task report from scratch in the Report Manager, or make a copy of an existing report and edit it to create a new report.

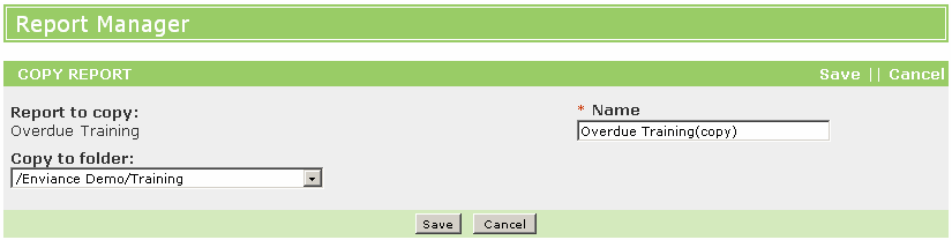
1 Right click the report you want to copy and choose Create Copy.



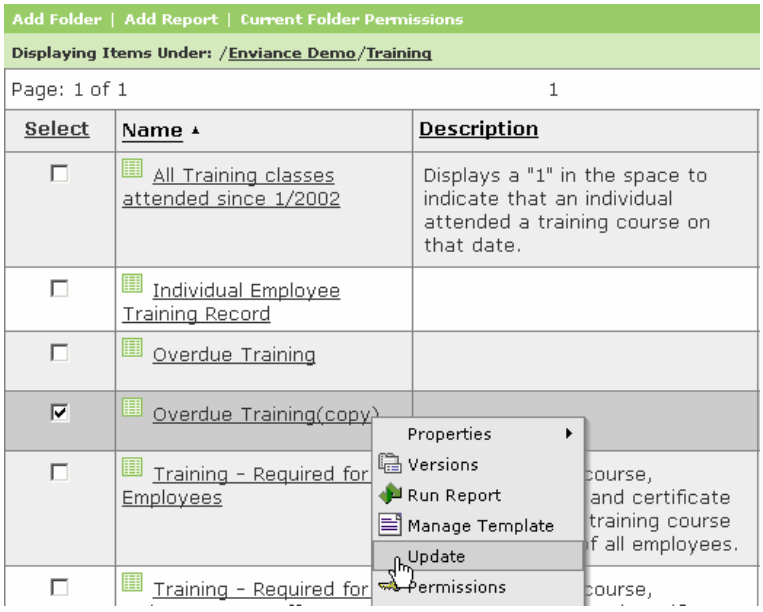
2 Right click the folder in which you want to create the copy and choose Paste.



3 Rename the report and click Save.

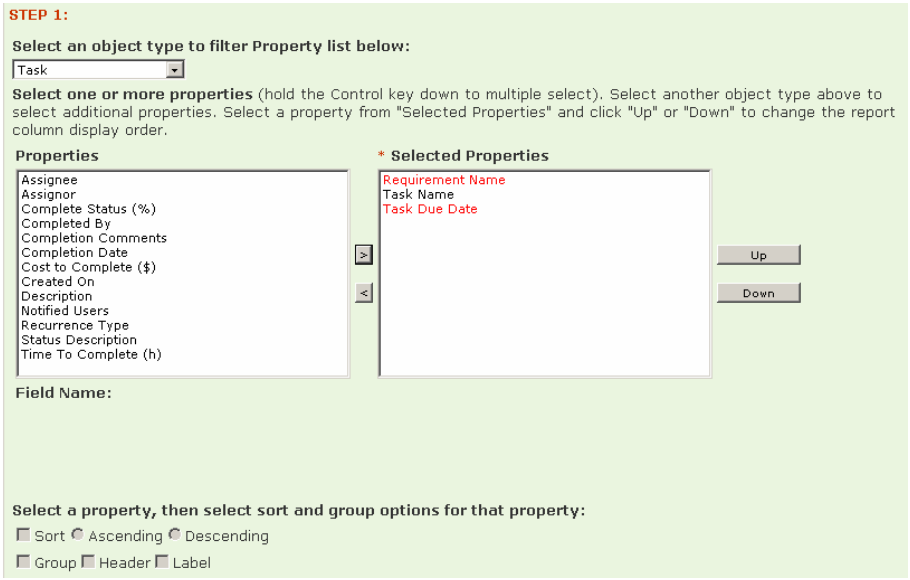


4 Right click the new report and choose Update.

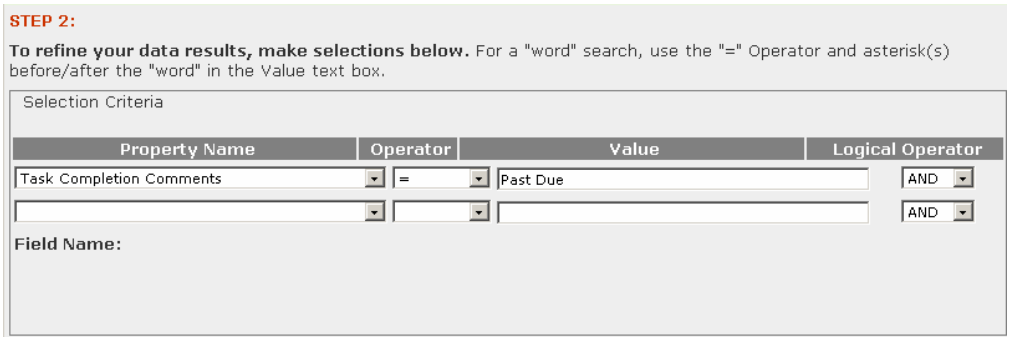


5 Modify the report filter criteria as desired.

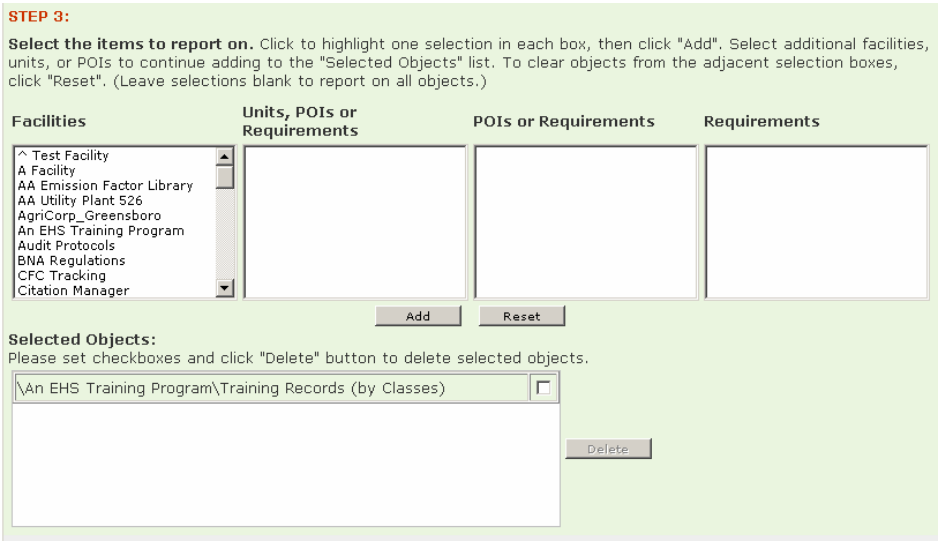
Select the fields you want to include in the report. The fields used in this report are shown in the Selected Attributes list. You can add or delete task fields or fields from any of the parent objects.



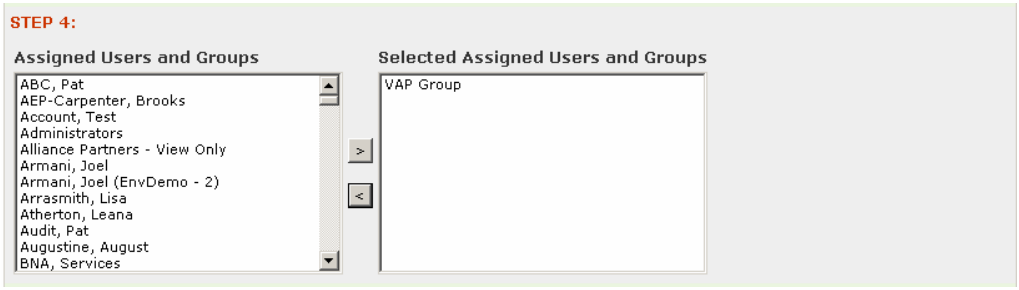
Filter properties for specific values by selecting the property and setting up the comparison criteria and value.



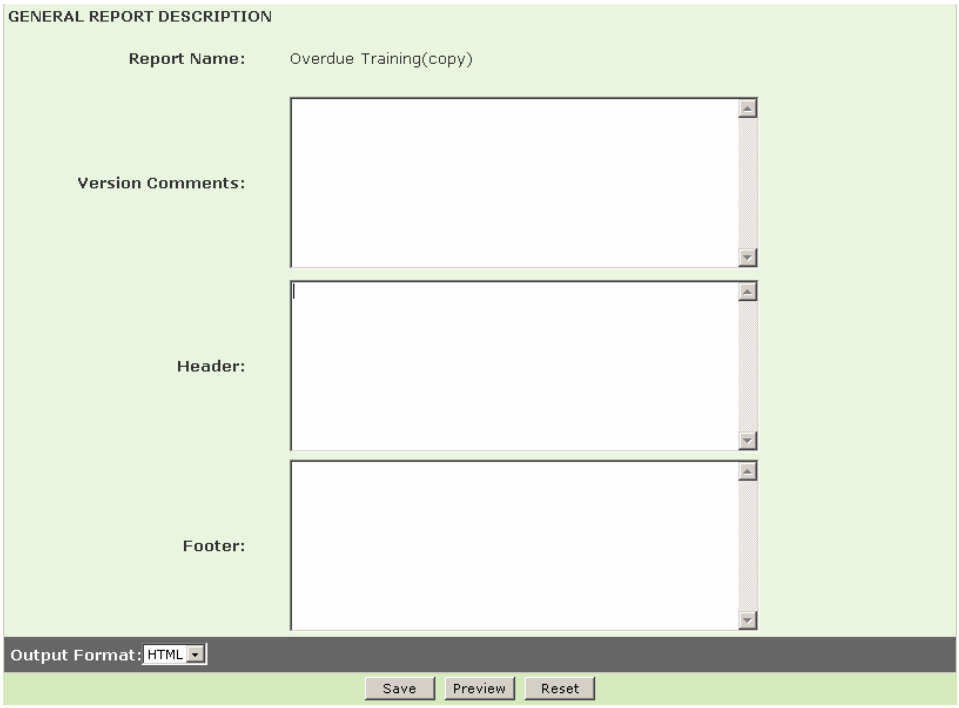
6 Add system model objecst to report on by selecting the parent object, then selecting child objects down to the level you want. Click Add to add new objects to the Selected Objects box. To delete an object, select it in the Selected Objects box and click Delete.



7 Select the users or groups you want to report on if you want to narrow the report. In this way, you filter for tasks assigned to specific users or groups.



8 Add a description, version comments, and header/footer text as desired. Click Preview to preview the report before saving it.



Other types of Task Reports are also available for analyzing overall task performance in the system.

Task Status Summary Report gives an overview of the status of all selected tasks.
Task Closing Time Summary Report gives an overview of the time taken to complete tasks.

LESSON RECAP

- ⇨ You can view tasks associated with an object from Task Manager or from the Object Calendar.
- ⇨ You can create and assign tasks for any object.
- ⇨ Multiple recurrence schedules can be set up for tasks that are repeated periodically.
- ⇨ You can set up task notification schedules to send timely reminders and notifications to the assignees, the task assignor and to other users.
- ⇨ Task Templates are used to generate tasks automatically from system events.
- ⇨ Task Reports can be run to keep track the status of tasks in the system.

Viewing and Entering Data

The Enviance System tracks data, such as air emissions or wastewater analysis, in addition to non-numeric information such as tasks and inspections. Numeric requirements store essential data required to meet your compliance requirements.

Data can be input directly into the system via an HTML page or uploaded from a Microsoft® Excel spreadsheet.

OBJECTIVES

When you have completed this lesson, you will know how to:

- ⇨ View data for a single requirement
- ⇨ View data for multiple requirements.
- ⇨ Enter data directly into the system via an HTML page.
- ⇨ Enter and upload data using an Excel spreadsheet.

Viewing Data

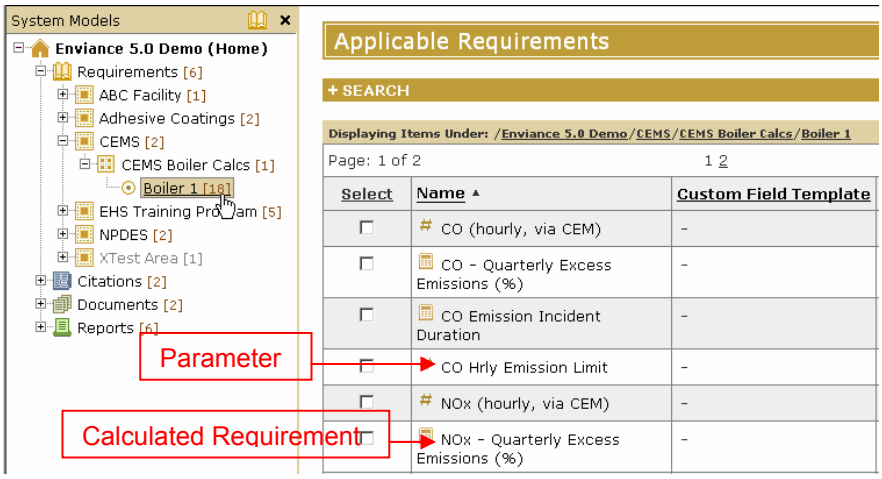
You may view and enter data for:

- One or more requirements under a common immediate parent object
- Multiple requirements under different parent objects

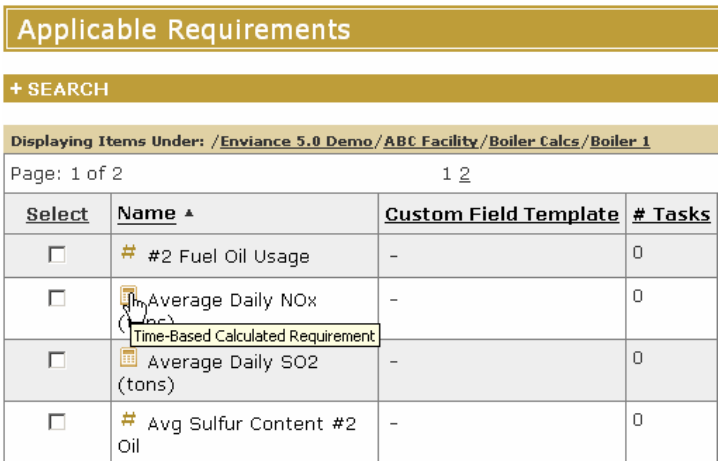
The data viewing procedure is essentially the same. However, if you want to view data for requirements in different locations in the Requirements tree, you must search for the appropriate requirements first.

View Data for a Single Unit or POI

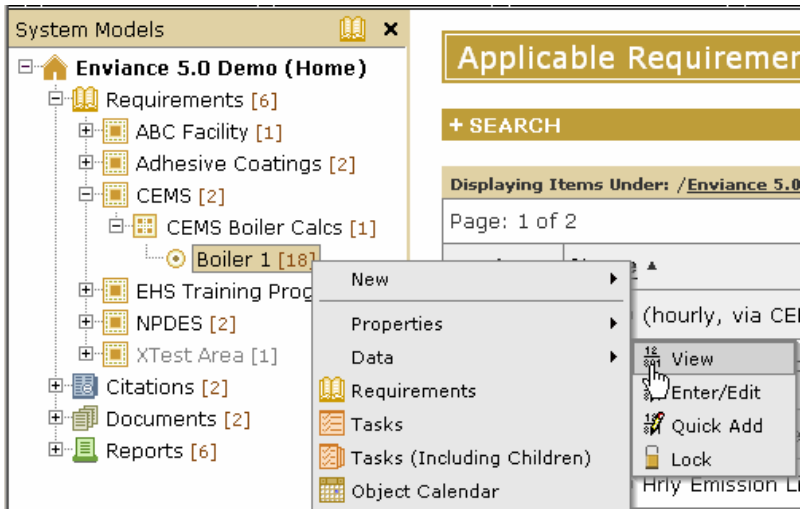
1 Expand the Requirements tree in the System Model Frame and select a Unit or POI that has multiple numeric requirements.



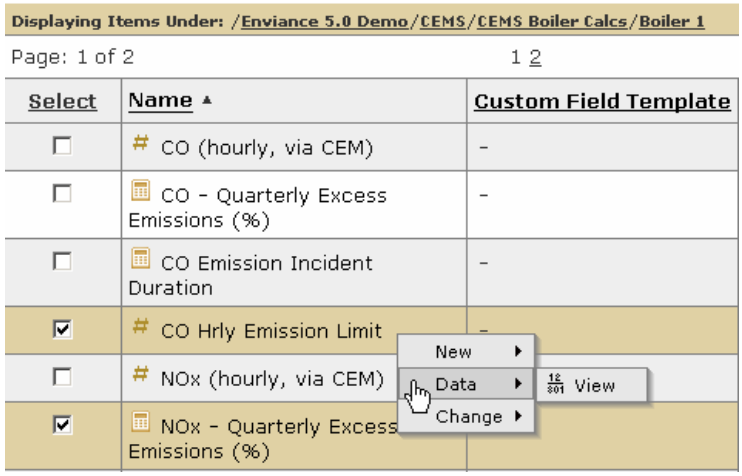
The Requirements directly under it are displayed in the Contents Frame. Note that the icon indicates whether a requirement is a Parameter or a Calculated Requirement. If you hold the cursor over the icon, a tool tip tells you exactly what kind of requirement it is.



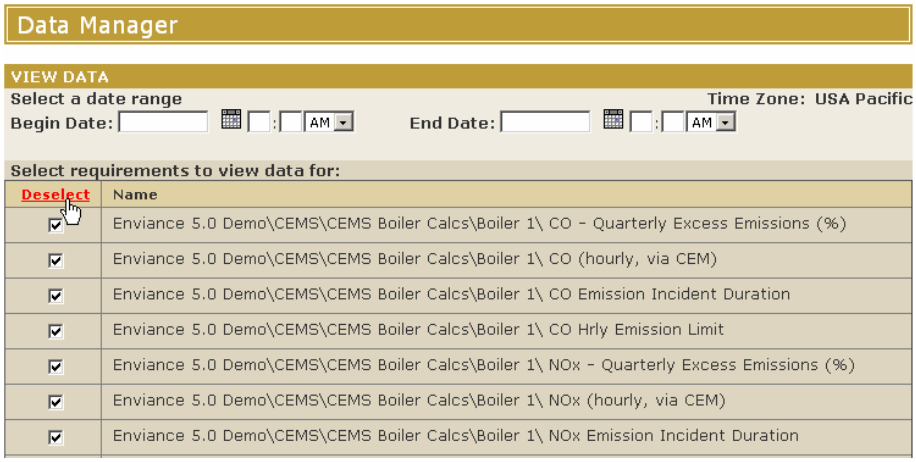
2 To view data for any or all of the requirements, right click the parent object in the Requirements tree and choose Data > View from the popup menu.

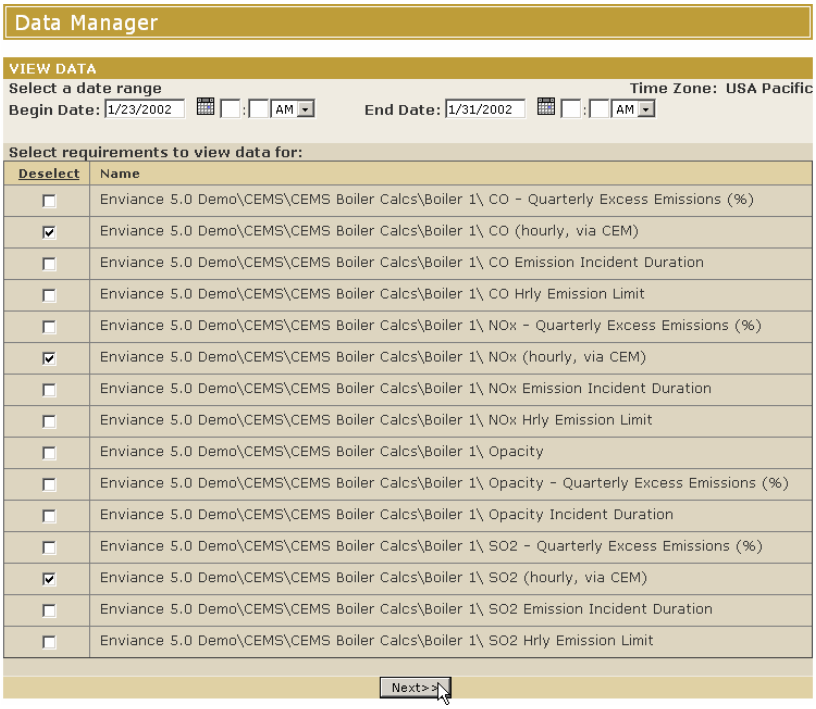


Alternatively, you can select one or more requirements whose data you want to view by checking the appropriate checkboxes. Then right click any of the selected requirements and choose Data > View.



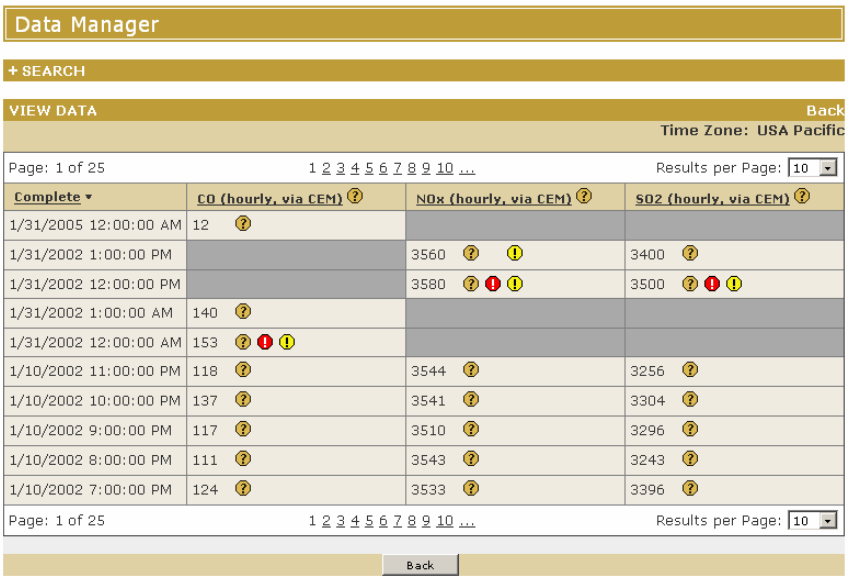
The View Data start page allows you to specify a date range for the data you want to view and to deselect/select requirements. If you used the System Model tree to initiate the data view, all requirements under the selected parent object are shown. You can uncheck those you don't want, or click Deselect to uncheck all, then select just the ones you want.





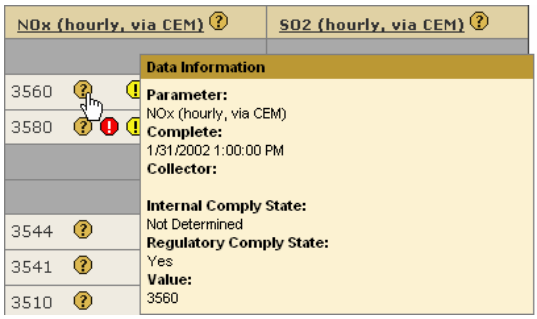
3 After choosing data you want to see and the date range, click Next.

The data is displayed. The table display shows the collector, the date entered, the value, and whether or not the value was determined to be in compliance.

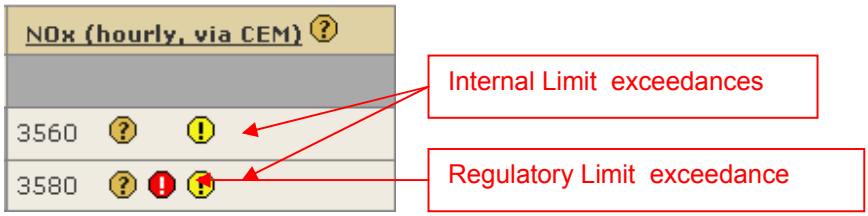


The icons on the page allow you to display further information for the data points.

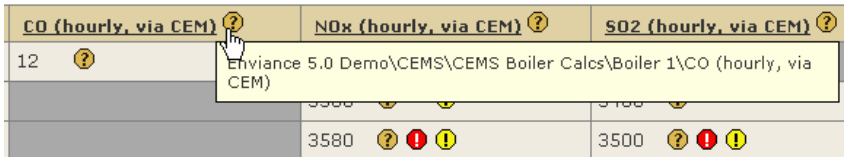
To view summary information for a data point click the icon next to the data point:



The icon indicates a regulatory limit exceedance. The icon indicates an internal limit exceedance.

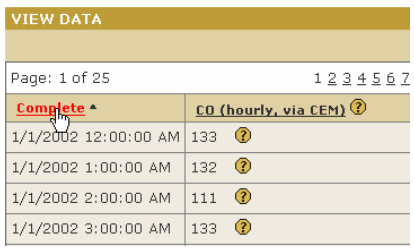


To see the full object path, click the icon in the column head.



If the value exceeded the regulatory limits for the requirement, its Comply status is Not Determined. The system allows you to decide if the value is to be considered out of compliance or not. For instance, if a reading is caused by an equipment malfunction, it may be unnecessary to make a report to an agency due to a regulatory exemption. For more information, see the Events training module.)

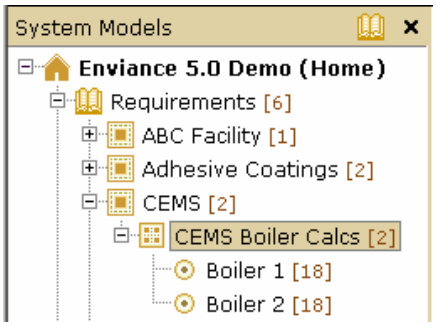
By default, data points are arranged by date, with the most recent data first. Click the Complete column head to change from descending to ascending.



View Data Across the Tree

You can view data for multiple requirements under different Units or POIs across the System Model tree by using the Search function to search for the objects you want first.

1 Select a common parent object in the Requirements tree, which is high enough in the hierarchy to include all the requirements you want.



To view data for both Boiler 1 and Boiler 2, select the common parent object, Boiler Calcs

2 Click the plus sign to expand the search pane in the Applicable Requirements view.

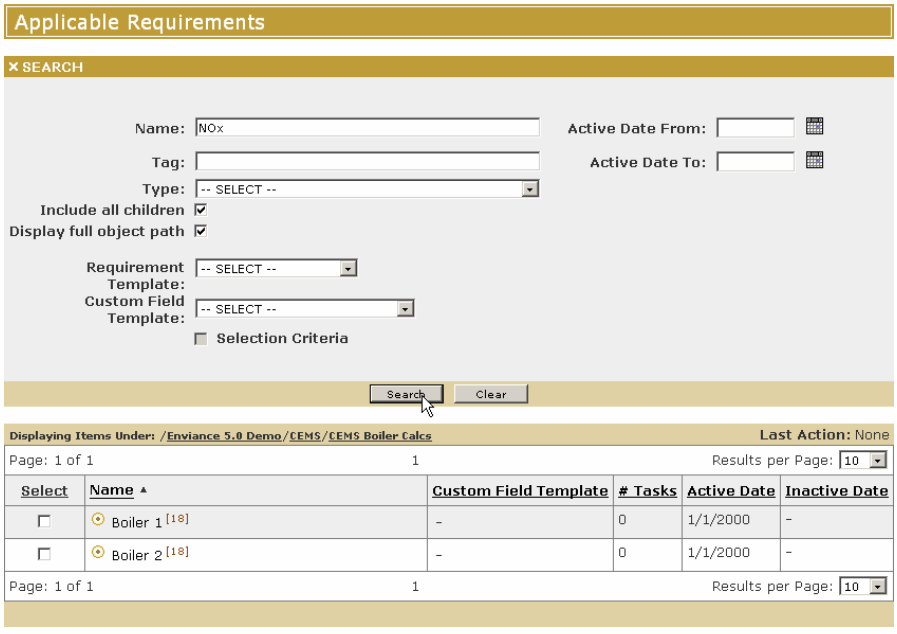
3 In the search pane, choose the search criteria to find the requirements you want.

Check "Include all children" so the search will include all items lower in the tree.

Check "Display full object path" if you want to see the full path, to distinguish between requirements that may have the same name

In the Type box you can choose the type of requirement (parameter, time-based calc, etc.), if you only want one type.

You may also narrow the selection to requirements that share the same Requirement Template or Custom Field Template. To filter by field values, check Selection Criteria and choose the fields and values to filter for.



4 After choosing the search criteria, click Search.

Objects matching the search criteria are displayed in the results list. If the requirements you want are not listed, or you want to further narrow the results, revise the search criteria and search again until the requirements you want are shown.

SEARCH RESULTS

Displaying Items Under: /Enviance 5.0 Demo/CEMS/CEMS Boiler Calcs — Last Action: None

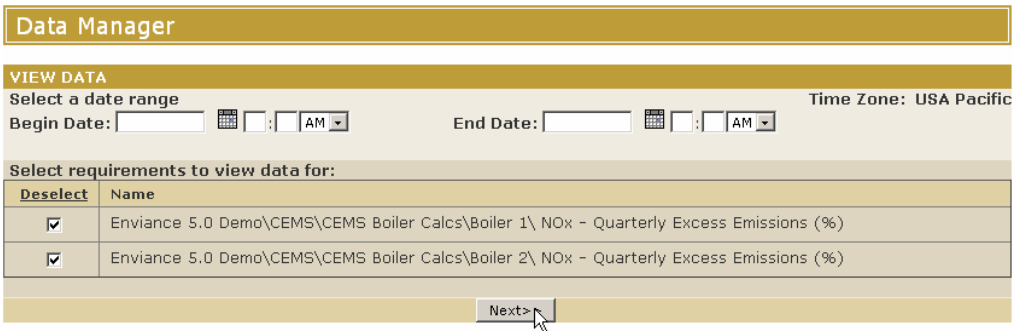
Page: 1 of 1 — 1 — Results per Page: 10

Select	Name ▲	Custom Field Template	# Tasks	Active Date	Inactive Date
☐	Enviance 5.0 Demo\CEMS\CEMS Boiler Calcs\Boiler 1\NOx (hourly, via CEM)	-	0	1/1/2000	-
☐	Enviance 5.0 Demo\CEMS\CEMS Boiler Calcs\Boiler 1\NOx - Quarterly Excess Emissions (%)	-	0	1/1/2000	-
☐	Enviance 5.0 Demo\CEMS\CEMS Boiler Calcs\Boiler 1\NOx Emission Incident Duration	-	0	1/1/2000	-
☐	Enviance 5.0 Demo\CEMS\CEMS Boiler Calcs\Boiler 1\NOx Hrly Emission Limit	-	0	1/1/2000	-
☐	Enviance 5.0 Demo\CEMS\CEMS Boiler Calcs\Boiler 2\NOx (hourly, via CEM)	-	0	1/1/2000	-
☐	Enviance 5.0 Demo\CEMS\CEMS Boiler Calcs\Boiler 2\NOx - Quarterly Excess Emissions (%)	-	0	1/1/2000	-
☐	Enviance 5.0 Demo\CEMS\CEMS Boiler Calcs\Boiler 2\NOx Emission Incident Duration	-	0	1/1/2000	-
☐	Enviance 5.0 Demo\CEMS\CEMS Boiler Calcs\Boiler 2\NOx Hrly Emission Limit	-	0	1/1/2000	-

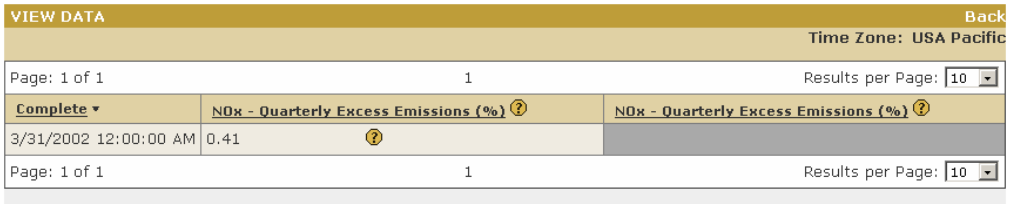
5 Select the requirements whose data you want to view by checking the appropriate checkboxes. Then right click any of the selected requirements and choose Data > View.. Then click Next.

Select	Name ▲	Custom Field Template
☐	Enviance 5.0 Demo\CEMS\CEMS Boiler Calcs\Boiler 1\NOx (hourly, via CEM)	-
☑	Enviance 5.0 Demo\CEMS\CEMS Boiler Calcs\Boiler 1\NOx - Quarterly Excess Emissions (%)	-
☐	Enviance 5.0 Demo\CEMS\CEMS Boiler Calcs\Boiler 1\NOx Emission Incident Duration	-
☐	Enviance 5.0 Demo\CEMS\CEMS Boiler Calcs\Boiler 1\NOx Hrly Emission Limit	-
☐	Enviance 5.0 Demo\CEMS\CEMS Boiler Calcs\Boiler 2\NOx (hourly, via CEM)	-
☑	Enviance 5.0 Demo\CEMS\CEMS Boiler Calcs\Boiler 2\NOx - Quarterly Excess Emissions (%)	-

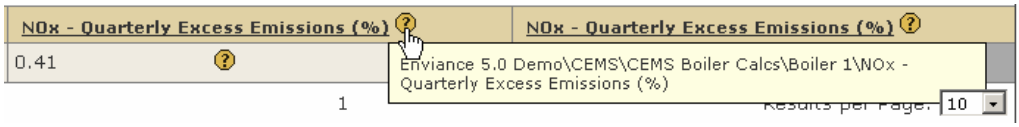
6 Select a date range, if desired. Click Next.



The data for the selected requirements is displayed.



Again, note that if two requirements have the same name, you can click the icon in the column head to view the full object path to distinguish them.



Viewing Data through Reports

When you want to view large amounts of data stored in the system, it may be necessary to generate a report to extract the data.

If you select data that is too large for generating and viewing in your web browser, you will receive a message informing you that you must either select fewer data points or generate a report.

Pre-configured reports specific to your system model are frequently available for common data extraction needs. You can also generate ad hoc reports and choose the data you need, if you have the appropriate user rights, or you can request the report to be prepared by someone at your company that has the appropriate user rights.

Direct Data Entry via HTML

You can use the Enviance interface online to enter and submit data directly to the system in HTML. Two methods are available for HTML data entry:

Quick Add: Use the Quick Add option to enter data points at a specified interval (for instance, a month's worth of data with daily entries).

Standard Data Entry: Use the Data Enter/Edit option to edit data, or enter discrete data points or small amounts of data with irregular date/time.

In general, Quick Add is the preferred method for entering data, since date/time fields are pre-completed for you acc.

Standard data entry is chiefly useful to edit existing data. When using this method for data entry, data points must be added one at a time.

Quick Add Data Entry

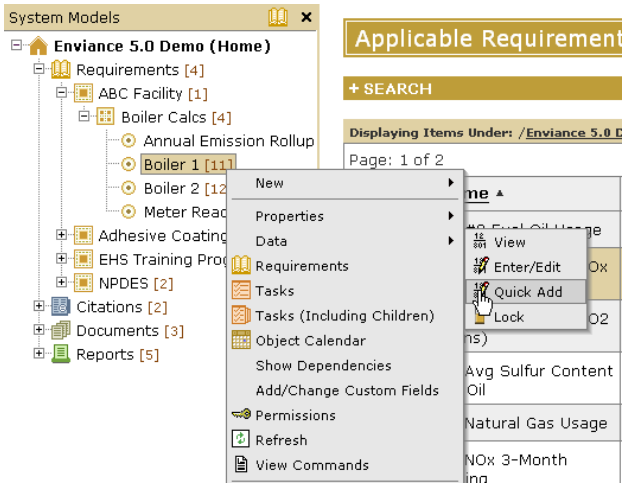
The Quick Add data entry function lets you enter multiple data points quickly at a specified interval (for instance, a month's worth of daily data entries).

With Quick Add, you choose the number of data points, the interval, and the start point, and a form is created with the number of data rows you want and the date/time pre-completed.

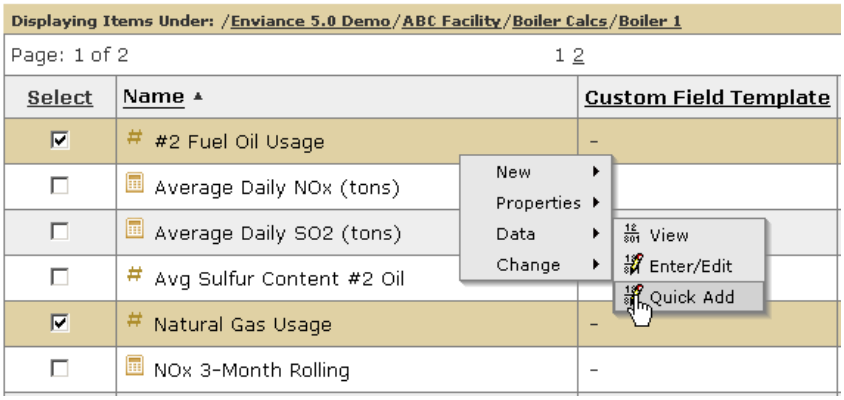
To enter data with Quick Add:

1 First, select the requirements for which you want to enter data, by one of the following methods:

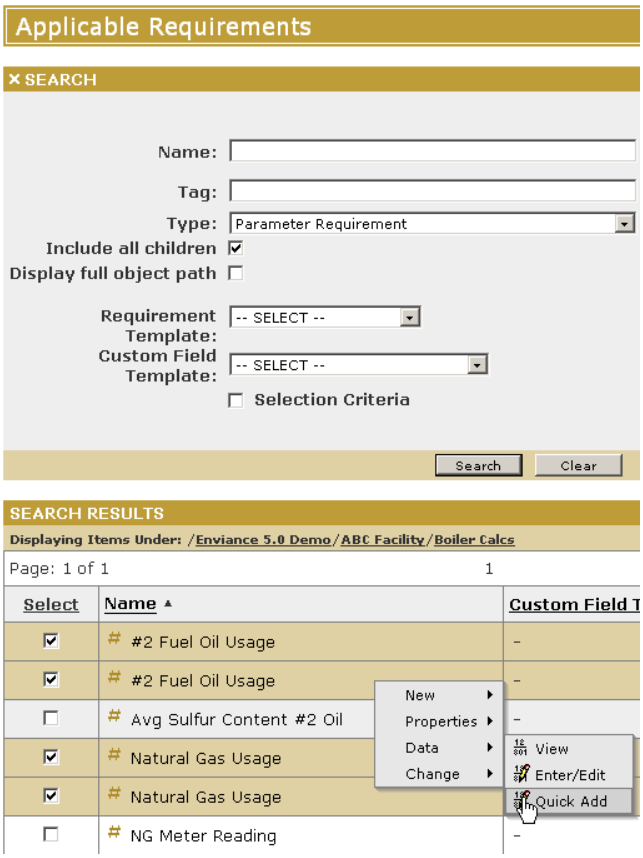
For parameters under the same parent, right click the parent object of the parameters and choose Data > Quick Add.



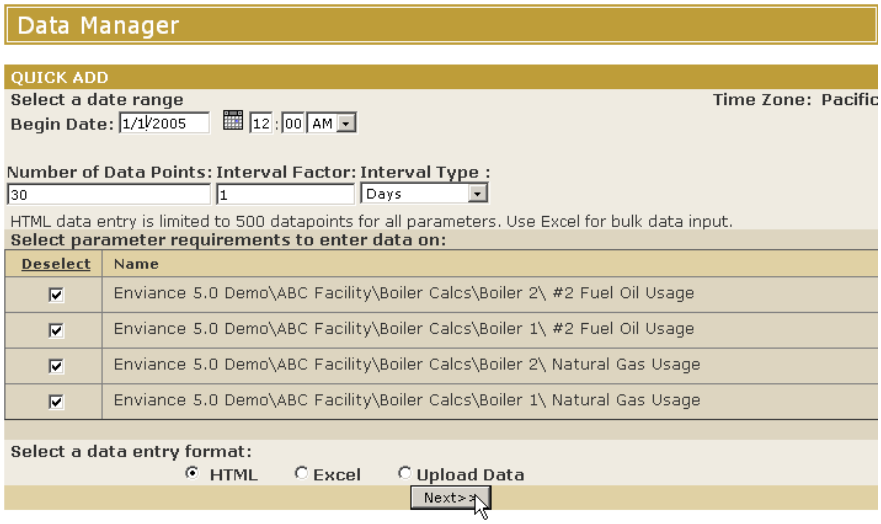
From the Applicable Requirements display, select the checkboxes for the parameters to enter data on. Then right click and choose Data > Quick Add.



For parameters under different parent objects, first search for the parameters using the Search function from the Requirements view of a common parent in the hierarchy.



The Quick Add criteria selection page appears.



2 Select the checkboxes for the parameters to enter data on (or de-select those you don't want).

To select specific parameters, click Deselect in column head and re-select the desired parameters. Or to select all, click Select in the column head.

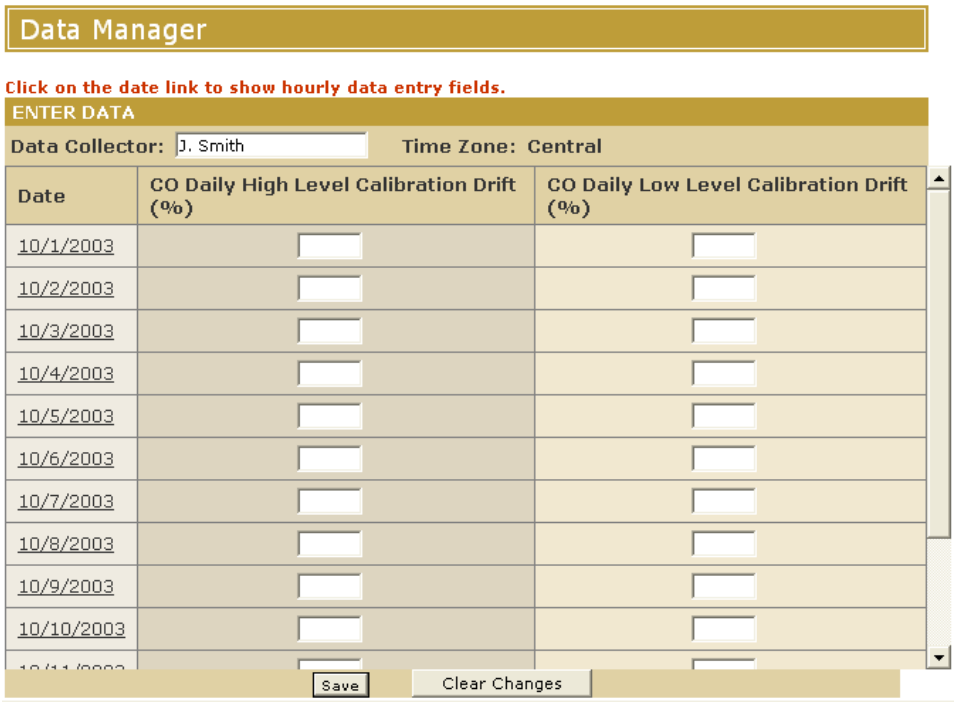
3 Specify the start date/time, number of data points, and the interval period.

- Begin Date: The first date for which you want to enter data.
- Number of Data Points: Total number of data points to create, starting with Begin Date.
- Interval Factor: Number by which to increment each data point.
- Interval Type: Unit of time to use for incrementing each data point (minutes, hours, days, months).

Example: To enter one month's worth of data with daily entries, the begin date is the first day of the month, number of data points is the number of days in the month (i.e., 30), interval factor is 1, interval type is Days.

4 Leave the data entry format at the default HTML selection. Then click Next.

The data entry screen appears. Rows are available for each data line, with a column for each parameter. The Collector field is available at the top of the page (the same Collector field value will be used for all data records in this batch).



5 Entering the data values.

To add additional data points, select Add.

Tip: Pressing the Tab key when the cursor is in the last entry field on the page creates a new data row with date/time automatically incremented to the next interval.

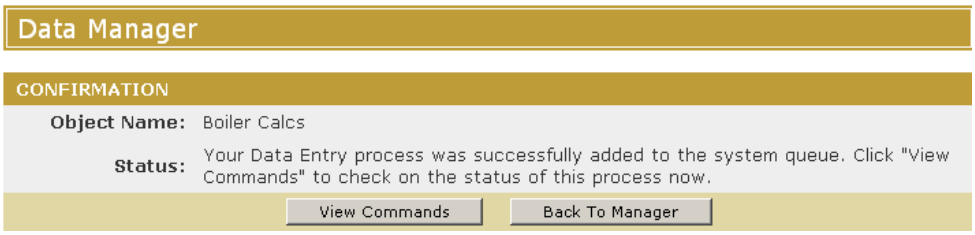
Any row left blank will be ignored. No data point will be created for that date/time. If data already exists for that date/time in the system, it will be preserved, unless you specifically overwrite it with a zero value.

The date/time must be unique (only one data point can be stored for the same date/time).

To clear all fields, select Clear Changes. This will erase all data entered in the page.

6 Select Save.

A confirmation message appears informing you that the transaction has been queued.



If a conflict with existing data is found, you will be prompted to choose Overwrite or Cancel the process.

Note that data entries may not appear immediately in the system, depending on the amount of calculation required and the system load. You can check the status of a command immediately by clicking View Commands. Completed transactions have the status Succeeded. Transactions still in process may be Processing or Waiting. Failed commands should be reported to your administrator. Data from a failed transaction is not saved and will need to be resubmitted once the problem is resolved.

7 Click Back to Manager to return to the previous view mode.

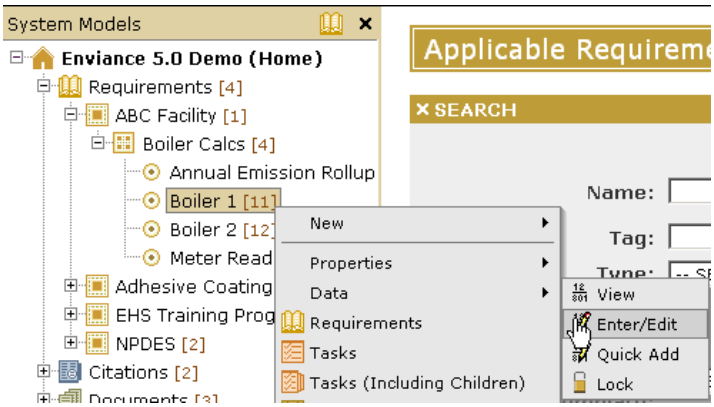
Discrete Data Entry

The standard data enter mode is used to enter discrete data points with irregular date/time or to edit existing data.

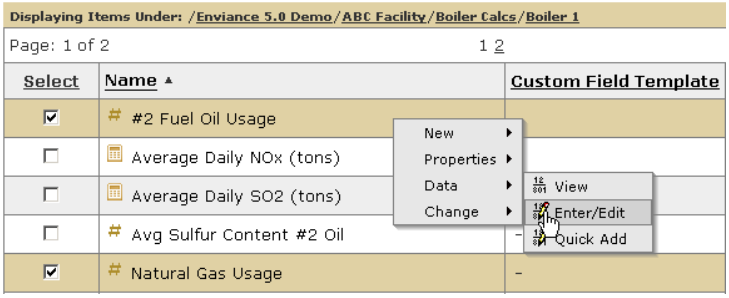
To enter data in standard data entry mode:

1 First, select the requirements for which you want to enter data. You can do this by one of the following methods:

For parameters under the same parent, right click the parent object of the parameters and choose Data > Enter/Edit.



From the Requirements view for the parent object, select the checkboxes for one or more parameters to enter data on. Then right click and choose Data > Enter/Edit.



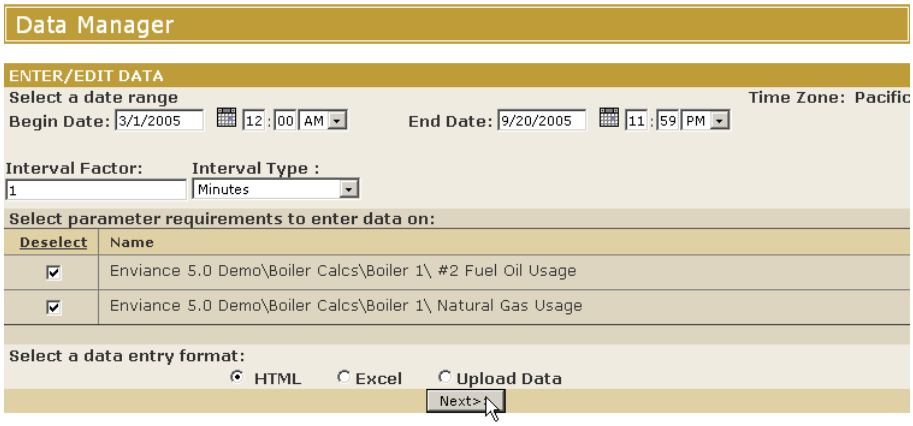
For parameters under different parent objects, first search for the parameters using the Search function from the Requirements view of a common parent in the hierarchy.

2 Enter a date range if you want to include existing data in the data entry view. You will be able to edit existing data as well as add new data. Otherwise, enter the Begin Date for the first data point you want to enter.

Note: The Interval Factor and Type boxes are used to increment the date/time when you add a new data point from the data entry screen. In Excel entry mode, it is also used to create data entry rows at specific intervals with pre-completed date/time.

If you need to select specific parameters, click Deselect in column head and re-select the desired parameters. Or to select all, click Select in the column head.

3 Leave the data entry format at the default HTML selection. Then click Next.



The data entry screen appears. If any data exists for the specified time period, it will be shown.

4 Click Add to add a new data point.

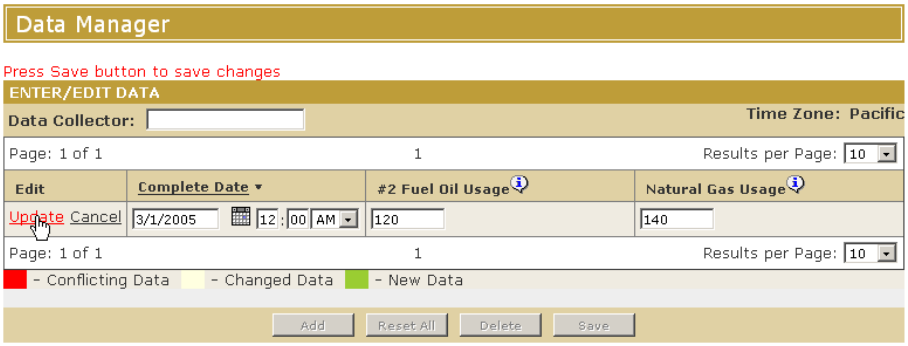
A new data row is created with fields available for entry.

5 Enter the data.

The Complete Date is the date/time at which to store the data. The date/time defaults to the current day at 12:00 AM and may be edited as desired. Data may be

entered up to the minute. The date/time must be unique (only one data point can be stored for the same date/time).

6 Select Update.

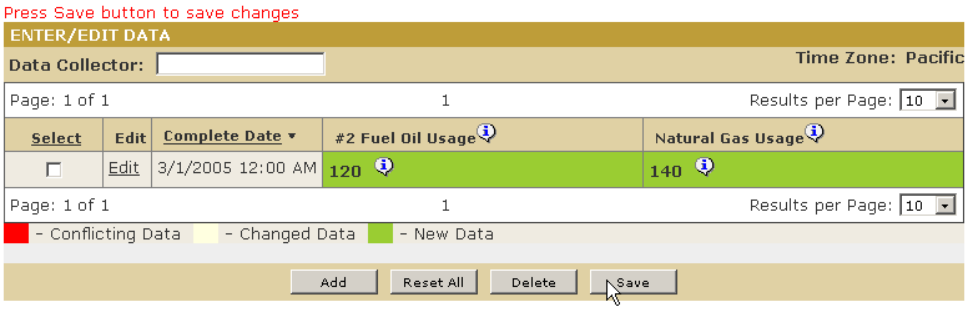


The new data line is displayed for review. New data is highlighted in green. If a conflict with existing data is detected, the data line will be highlighted in red.

You may more data points by selecting Add.

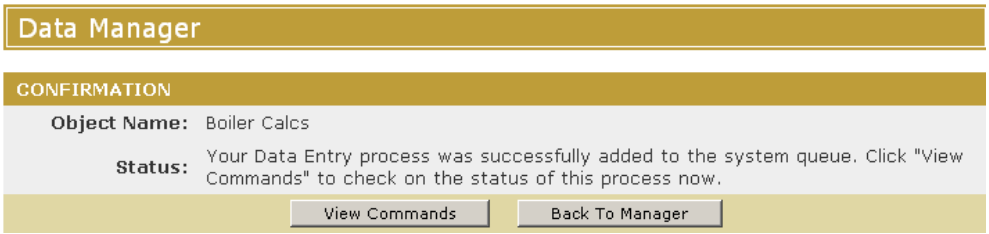
7 Select Save to save the data.

Important: Data is not saved until you click Save.



If a conflict with existing data is found, you will be prompted to choose Overwrite or Cancel the process.

A confirmation message appears informing you that the transaction has been queued.



Note that data entries may not appear immediately in the system, depending on the amount of calculation required and the system load. You can check the status of a command immediately by clicking View Commands. Completed transactions have the status Succeeded. Transactions still in process may be Processing or Waiting. Failed commands should be reported to your administrator. Data from a failed transaction is not saved and will need to be resubmitted once the problem is resolved.

Editing Data

Data for numeric requirements can be edited in two ways:

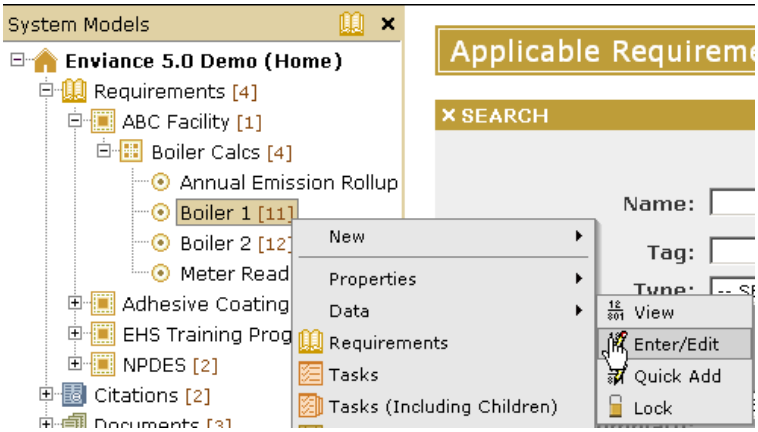
- Via the HTML data entry form
- Uploading new data to overwrite existing data via an Excel file.

Data calculated by the system may not be edited, with one exception: Data for a time-based subtraction requirement may be edited, to allow for manually resetting the value to 0 (or other specific value).

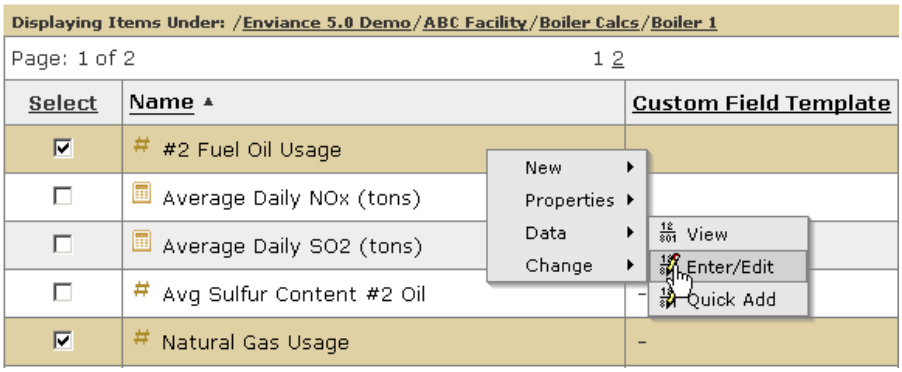
To edit data for a requirement via HTML:

1 First, select the requirements for which you want to enter data. You can do this by one of the following methods:

For parameters under the same parent, right click the parent object of the parameters and choose Data > Enter/Edit.



From the Requirements view for the parent object, select the checkboxes for the parameters to enter data on. Then right click and choose Data > Enter/Edit.



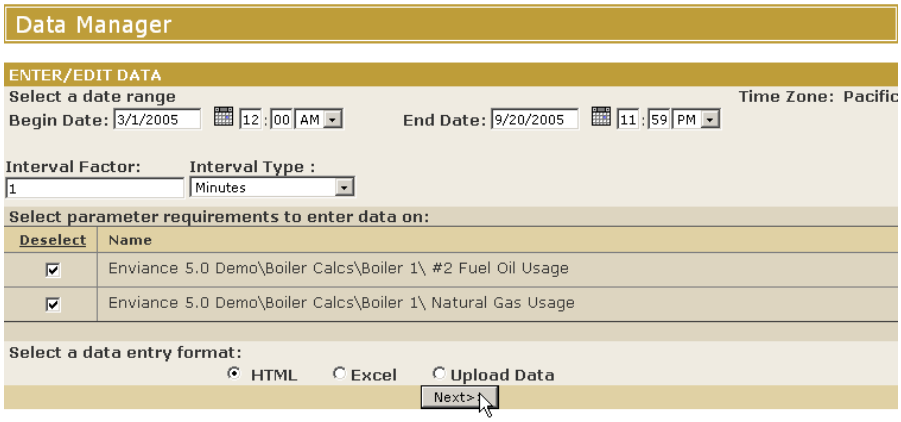
For parameters under different parent objects, first search for the parameters using the Search function from the Requirements view of a common parent in the hierarchy.

2 Select the checkboxes for the parameters to enter data on (if not already selected).

To select specific parameters, click Deselect in column head and re-select the desired parameters. Or to select all, click Select in the column head.

3 Enter a date range to include the existing data you want to edit in the data entry view. You will be able to edit existing data as well as add new data.

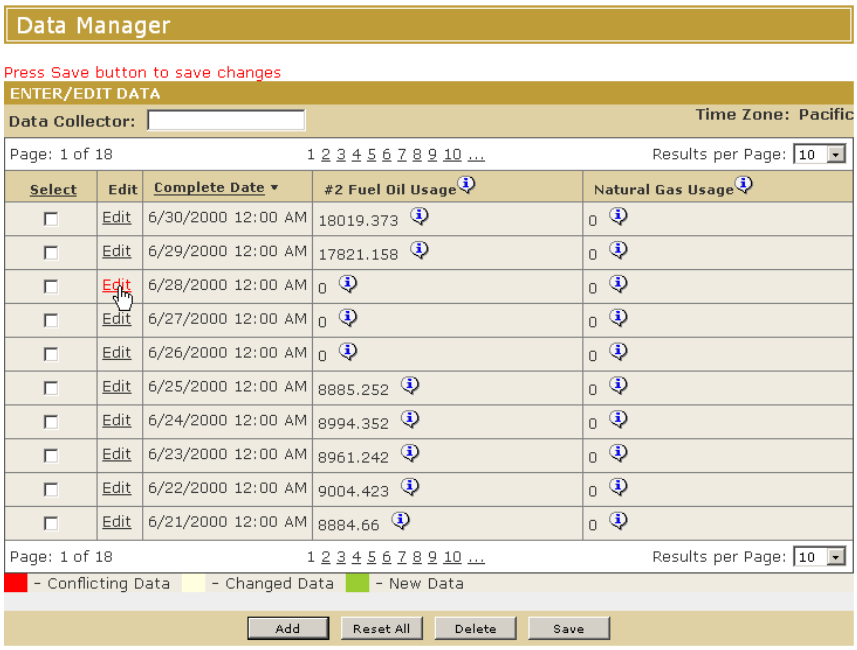
4 Leave the data entry format at the default HTML selection. Then click Next.



The data entry screen appears. Any data that exists within the date range selected will be shown.

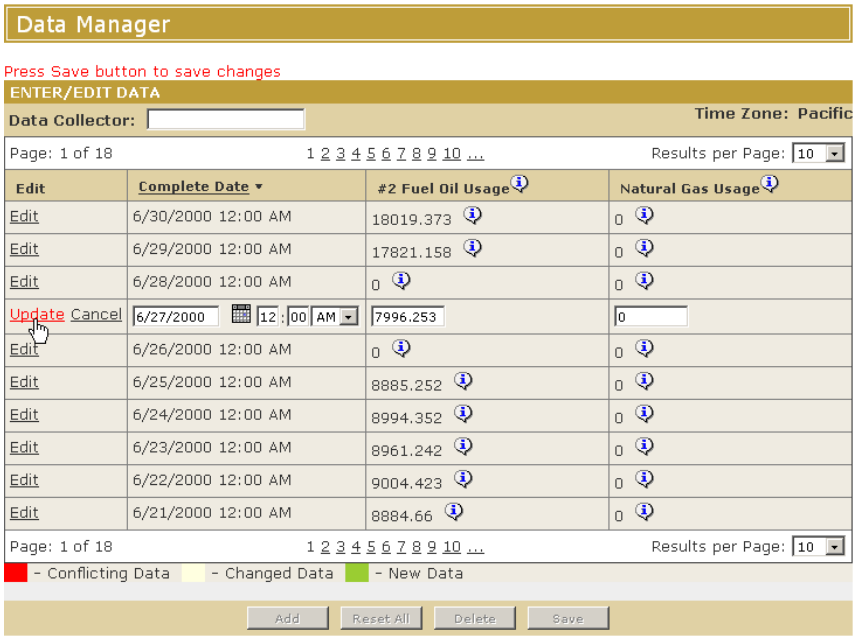
5 Select the Edit link for the record that you want to edit.

The record displays with the fields available for editing.



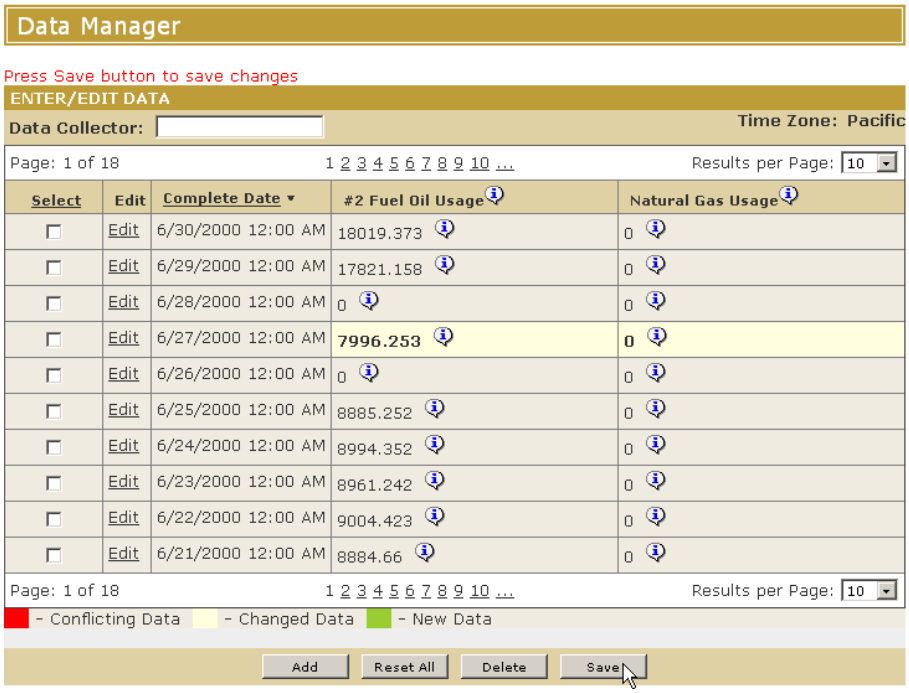
6 Make the desired changes in the data fields.

7 Select Update.



The data is displayed for review. Changes are shown highlighted in pale yellow. If a conflict with existing data is detected, the data line will be highlighted in red. New data is highlighted in green.

8 Select Save to save the changes.



Important: Data changes are not saved until you click Save.

Note: The Comply and Internal Comply fields are set automatically according to the system model configuration and may not be edited. To change these values, you

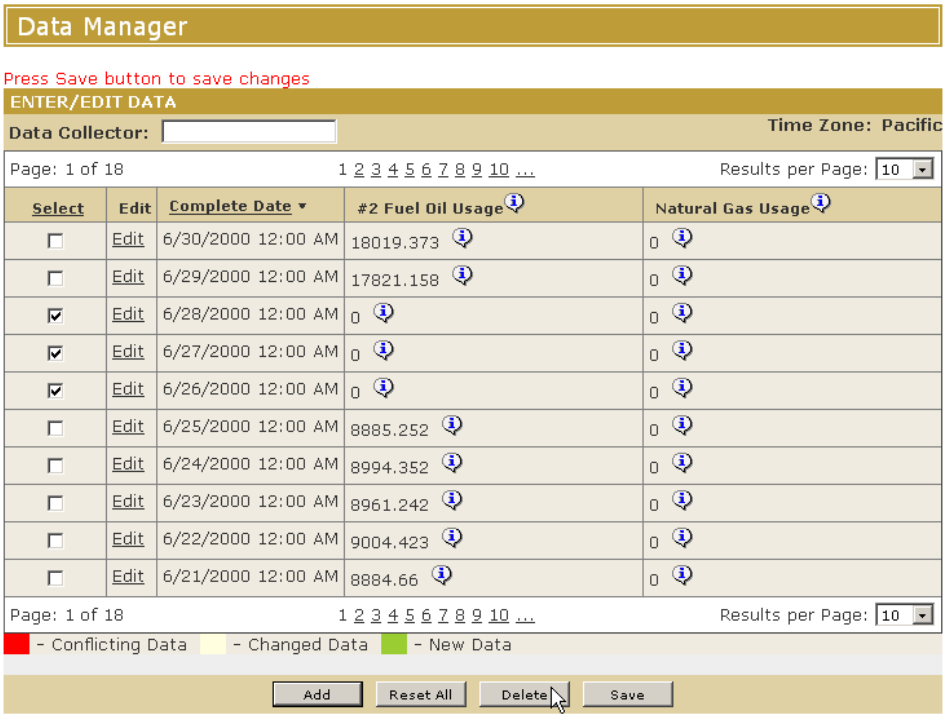
must edit the limit history for the requirement, as they are used to generate data warnings when regulatory or internal limits are exceeded.

To delete data:

1 In the Data Enter/Edit screen, find the data you want to delete.

You can search for the data by date using the Begin and End Dates.

2 Select the Delete checkbox for the records that you want to delete.



3 Select Delete.

A confirmation dialog appears.

4 Select OK to confirm that you want to delete the selected data.

Data Entry in Excel

Large amounts of data are typically entered via an Excel spreadsheet. The system generates a blank spreadsheet for the dates and variables you select which you can use to enter data and upload it to the system. The date/time fills the first column in the spreadsheet and the variables/parameters become the column headers.

Either standard Data Enter/Edit or Quick Add can be used to generate the Excel template to use for data entry. Both methods will produce a template with data rows pre-stamped with the date/time. The difference is only in how you specify the date range for the data.

- In Quick Add, the start date/time is specified along with the number of data points to generate and the interval factor for incrementing each data row. The

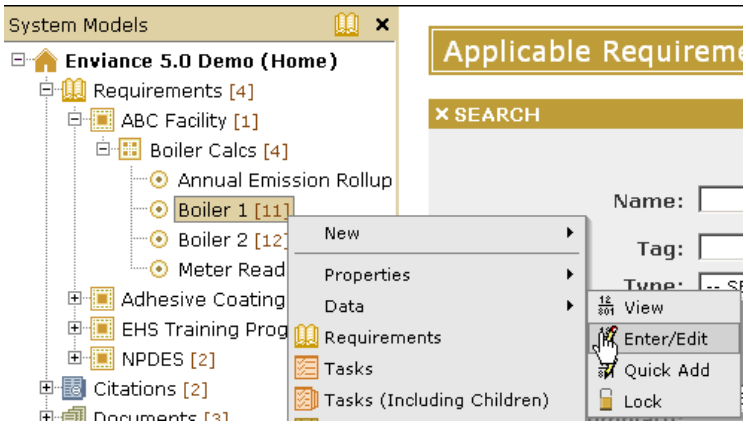
end date/time is calculated based on the number of datapoints and interval factor.

- In standard data entry mode, the start and end date/time is specified along with the interval factor for incrementing each data row.

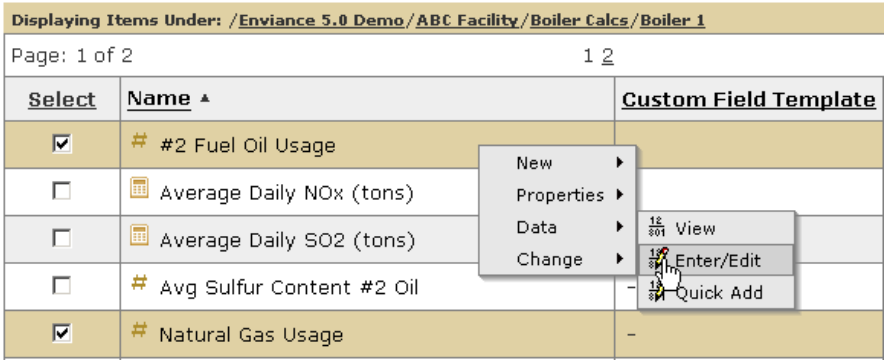
To add or edit data in Excel format:

1 First, select the requirements for which you want to enter data. You can do this by one of the following methods:

For parameters under the same parent, right click the parent object of the parameters and choose Data > Enter/Edit or Quick Add.



From the Requirements view for the parent object, select the checkboxes for the parameters to enter data on. Then right click and choose Data > Enter/Edit or Quick Add.



For parameters under different parent objects, first search for the parameters using the Search function from the Requirements view of a common parent in the hierarchy. Then select the parameters and choose data entry mode as above.

1 Select the checkboxes for the parameters to enter data on (if not already selected).

To select specific parameters, click Deselect in column head and re-select the desired parameters. Or to select all, click Select in the column head.

2 Select the options for generating data rows in the template:

In Quick Add, enter a Start time, the number of datapoints to create, and the interval factor and type.

In standard data entry mode, enter a begin and end date/time and select the interval factor and type.

- Interval Factor: Number to increment each data point by.
- Interval Type: Unit of time to use for incrementing each data point (minutes, hours, days, months).

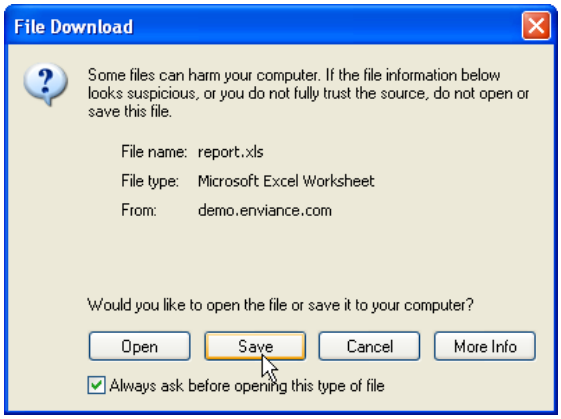
Example: To enter one month's worth of data with daily entries in standard data entry mode, the begin date and end date are the first and last days of the month. The interval factor is 1; interval type is days. To enter the same data in Quick Add, the begin date/time is first day of the month, number of datapoints is 30, interval factor is 1, type is days.

3 For the data entry format select Excel. Then click Next.

A dialog appears asking whether you want to open or save the document.

4 Choose Save to save the template to your computer. Choose a location to save it and rename the file if desired.

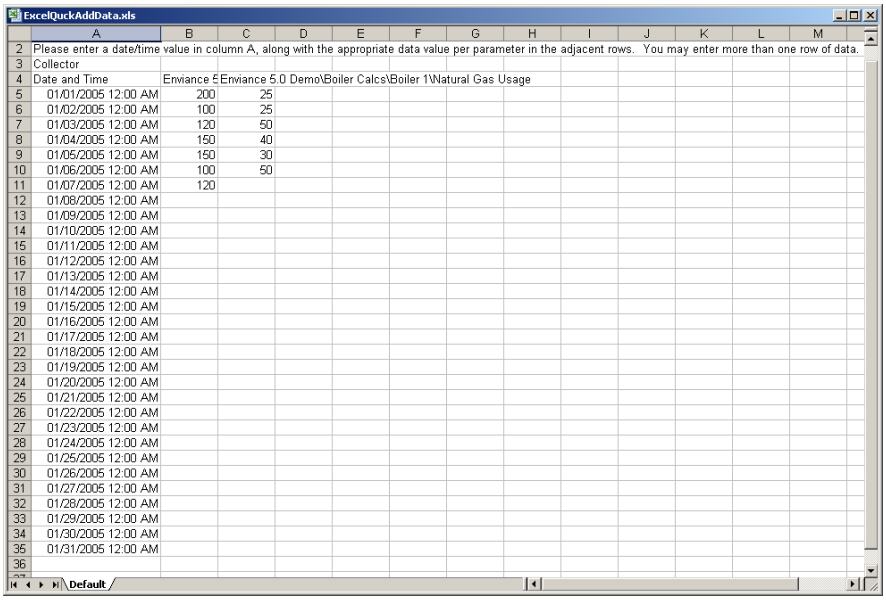
You may choose Open to open the Excel template and enter data immediately. However, before uploading the data, you must save the file locally.



5 Save the Excel spreadsheet locally

6 Open the file in Excel and enter the data as needed. Then save the file.

Any existing data for the date range and requirements you selected will appear in the template. You may edit and overwrite this data as appropriate. When you upload the file, all data for the same date/times shown in the spreadsheet will be replaced.



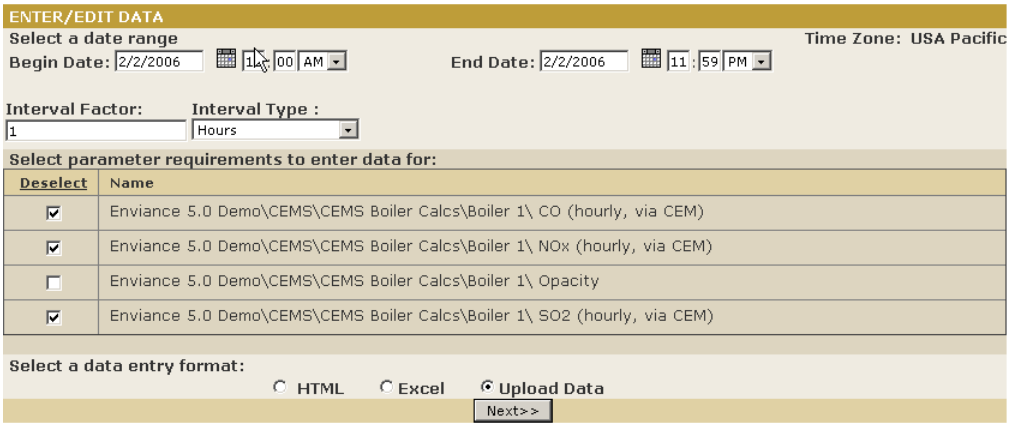
Uploading Excel Data

1 When you are ready to upload data from an Excel file, return to the Data Entry screen, by right clicking any container and choosing Data > Enter Edit or Quick Add.

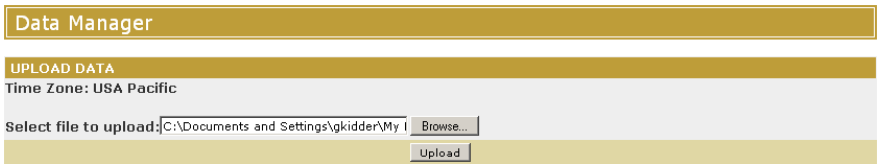
Since the id of the requirements for which you are entering data is stored in the Excel template, it does not matter what object you select.

2 Choose the Upload Data button, then select Next.

Note: When uploading data, you do not need to specify a date range or select parameters. The dates and parameter selections are irrelevant, as they will be imported from the Excel spreadsheet.

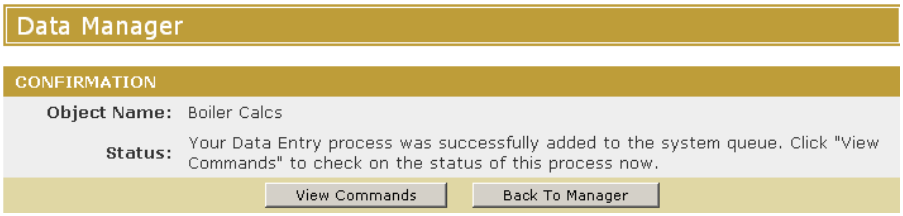


3 Select Browse and browse to find the Excel data file from your local folders.



4 Select Upload.

When upload is complete, a message confirms that the data has been uploaded and queued for entry.



Note that data entries may not appear immediately in the system, depending on the amount of calculation required and the system load. You can check the status of a command immediately by clicking View Commands. Completed transactions have the status Succeeded. Transactions still in process may be Processing or Waiting. Failed commands should be reported to your administrator. Data from a failed transaction is not saved and will need to be resubmitted once the problem is resolved.

Click Back to Manager to return to the previous view mode.

LESSON RECAP

- ⇨ You can view data for a single numeric requirement directly in the system.
- ⇨ You can view data for multiple numeric requirements from the parent object.
- ⇨ You can enter data for one or more requirements from an HTML page.
- ⇨ You can enter and upload large amounts of data using an Excel spreadsheet.

Event Logs: Responding to Events

Event Logs are used to store data related to incidents, such as health and safety incidents and deviations for monitored requirements. Some examples of uses of events in the system are:

- Maintain logs of audits and inspections
- Keep incident records for OSHA reporting purposes
- Maintain Title V deviation logs to record data limit exceedances and document causes and corrective actions

Tasks can be automatically triggered when an incident occurs, with the task assignee given the responsibility for supplying further details about the event, deciding whether the event represents a true deviation or not, and/or filing any required reports.

Event Reports help you extract the information you need for reporting requirements and to manage incidents.

OBJECTIVES

When you have completed this lesson, you will know how to:

⇨ View and edit Event Log entries

⇨ Create an entry for a manual Event Log

⇨ View and complete tasks triggered automatically by an event

⇨ Edit automatically triggered events for data exceedances to determine compliance status

⇨ Document potential non-compliance events related to non-numeric tasks

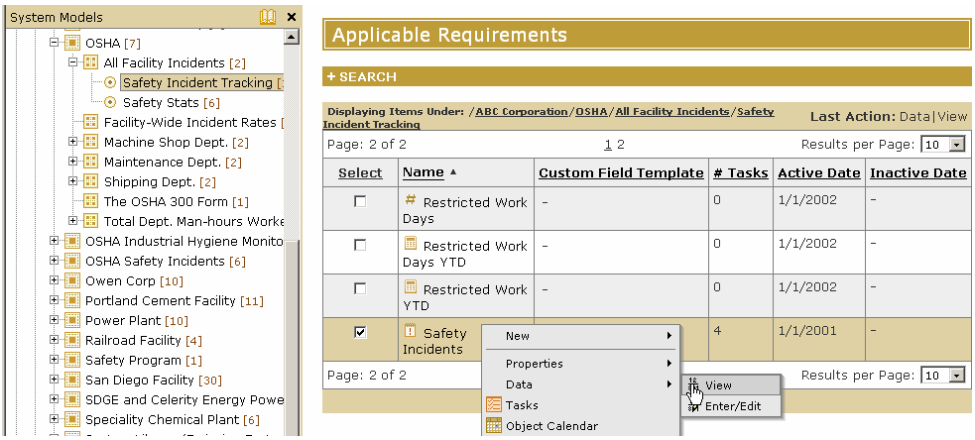
⇨ Run an Event Report

View and Edit Event Logs

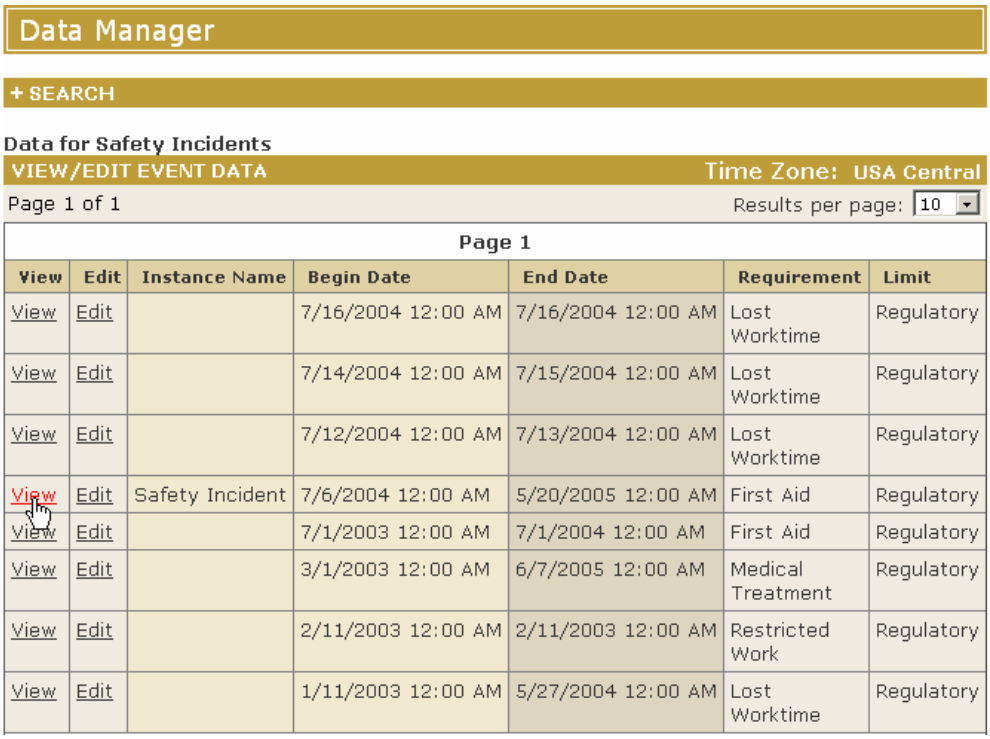
You can set up an Event Log in the system to manually log events such as audit and inspection findings or incident records. This type of event is typically associated with a Non-numeric Requirement, such as a requirement to perform regular audits. Log entries are created manually as needed.

To view and edit Event Log entries:

1 In the Applicable Requirements view, select the Event Log, right click and choose Data > View from the popup menu.



The data view shows the list of event instances that have been logged. In this example, each row represents a safety incident that needs to be documented.



Data Manager

+ SEARCH

Data for Safety Incidents

VIEW/EDIT EVENT DATA Time Zone: USA Central

Page 1 of 1 Results per page: 10

Page 1

View	Edit	Instance Name	Begin Date	End Date	Requirement	Limit
View	Edit		7/16/2004 12:00 AM	7/16/2004 12:00 AM	Lost Worktime	Regulatory
View	Edit		7/14/2004 12:00 AM	7/15/2004 12:00 AM	Lost Worktime	Regulatory
View	Edit		7/12/2004 12:00 AM	7/13/2004 12:00 AM	Lost Worktime	Regulatory
View	Edit	Safety Incident	7/6/2004 12:00 AM	5/20/2005 12:00 AM	First Aid	Regulatory
View	Edit		7/1/2003 12:00 AM	7/1/2004 12:00 AM	First Aid	Regulatory
View	Edit		3/1/2003 12:00 AM	6/7/2005 12:00 AM	Medical Treatment	Regulatory
View	Edit		2/11/2003 12:00 AM	2/11/2003 12:00 AM	Restricted Work	Regulatory
View	Edit		1/11/2003 12:00 AM	5/27/2004 12:00 AM	Lost Worktime	Regulatory

2 Select View to see the details of an instance.

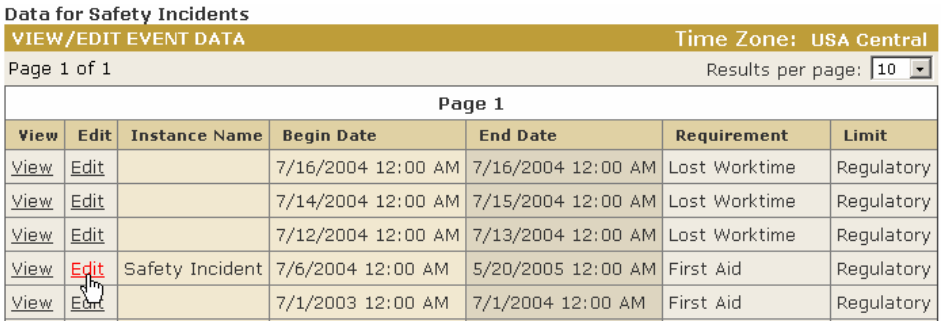
The information related to the instance is shown.

Field	Value
Instance Name	Safety Incident
Begin Date	7/6/2004 12:00 AM
End Date	5/20/2005 12:00 AM
Requirement	First Aid
Limit	Regulatory Limit
Due Date	7/6/2004 12:30 AM

Event Template Fields
Case No. O-144
Date of Injury-Onset of Illness (mo-day) 1/11/2003
Days Away From Work True
Death False
Body Part None given
Describe injury or illness, parts of body affected Respiratory attack due to inhalation of fumes from solvent spill
Employee's Name Pablo Painter

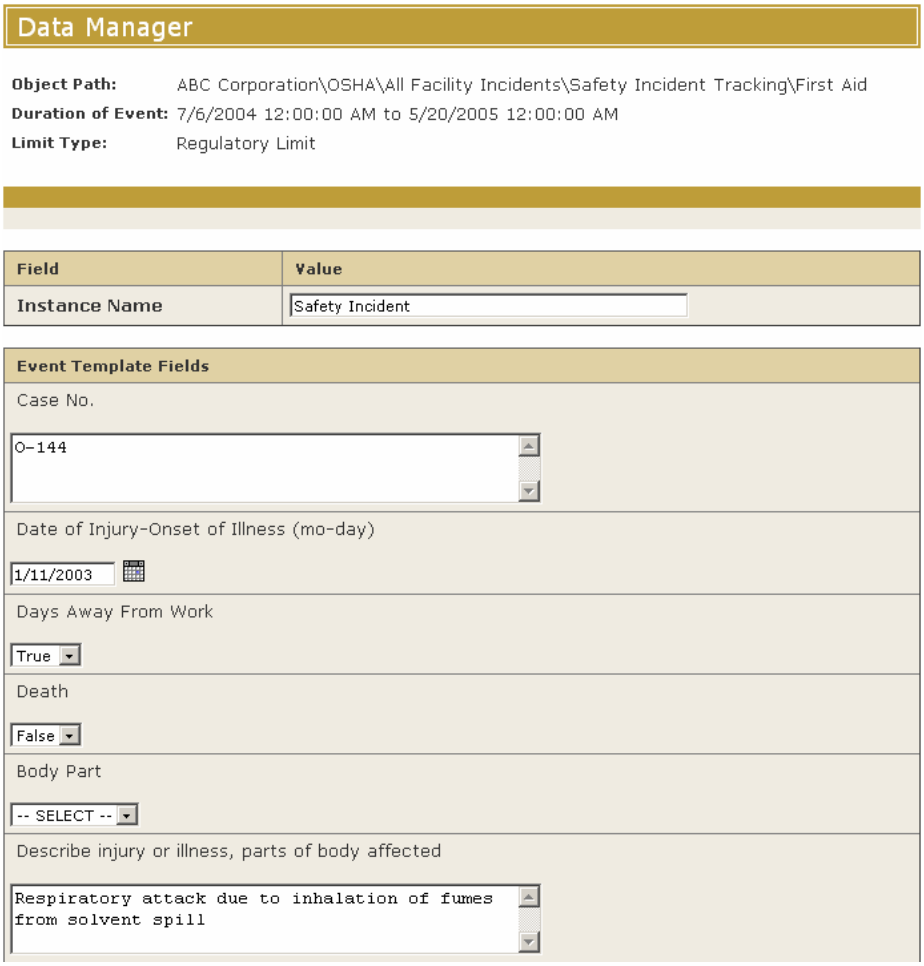
3 Click Back to Event List at the bottom of the page.

4 Click the Edit link for an event.



The information is now displayed in an editable form. You can edit the information in the fields as desired.

Note: Your ability to view and edit data is dependent on the permissions and user rights assigned to you in the system.

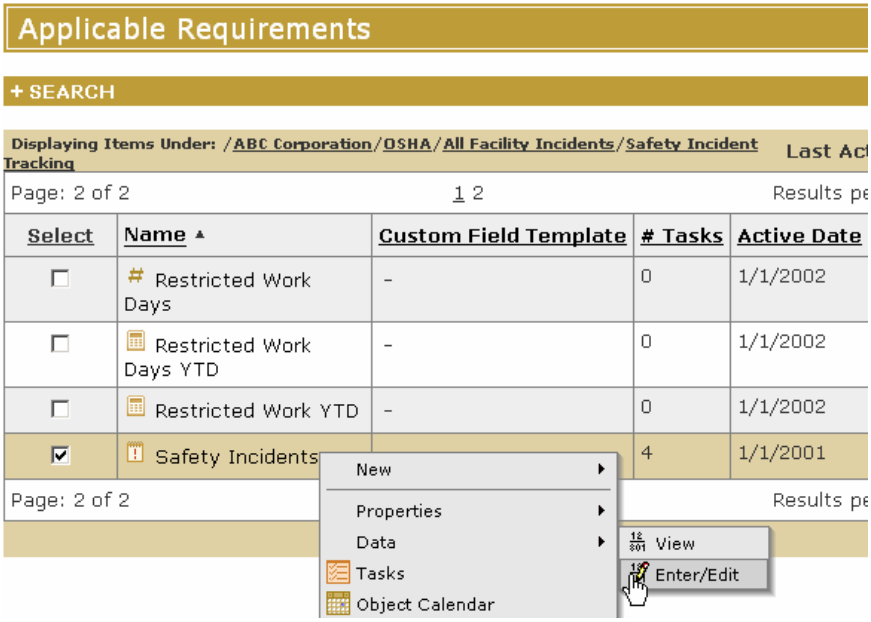


Create a Manual Event Log Entry

Event Logs that are used to record such discreet events as safety incidents or audits and inspections are manual event logs. Records are created created manually as needed.

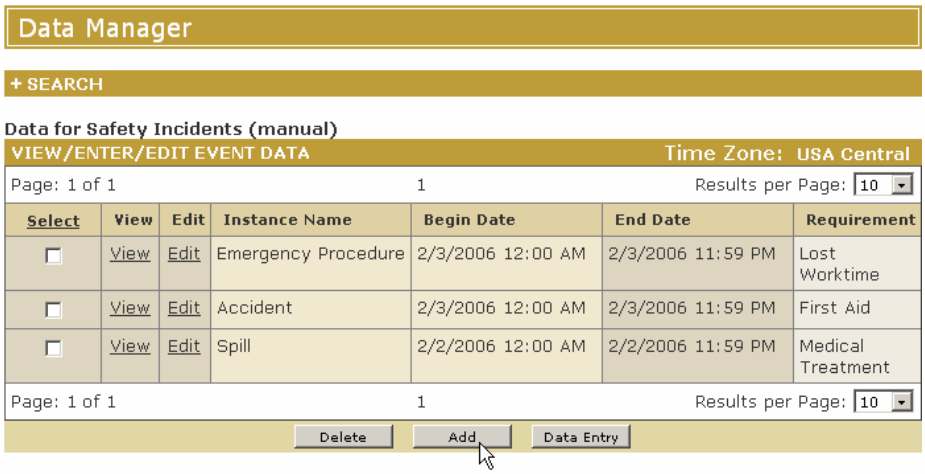
To create a manual Event Log entry:

1 In the Applicable Requirements view, select the Event Log, right click and choose Data > Enter/Edit.



The Event Log shows the list of event instances that have been logged. Buttons are available to allow you to add log entries. (Only users with the appropriate user rights will be able to access this option.)

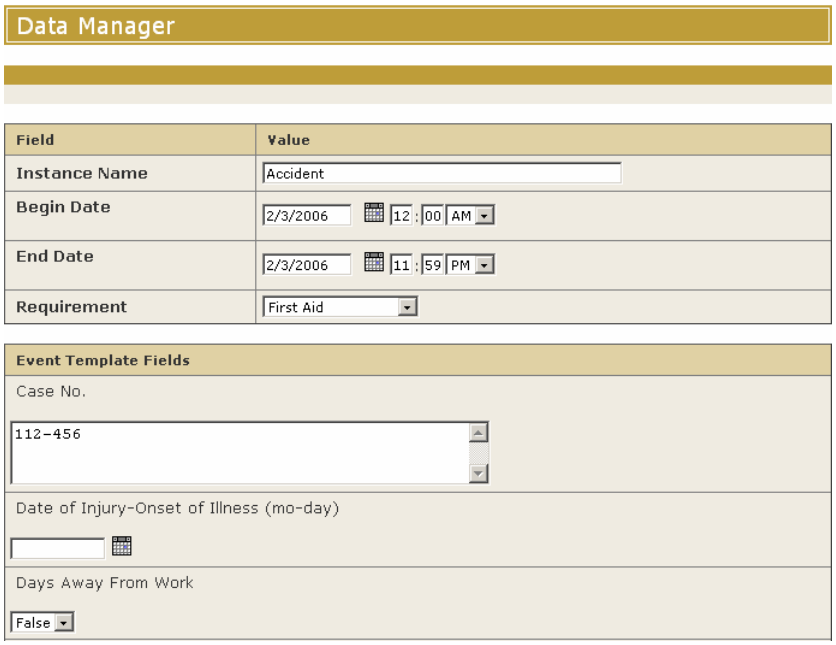
2 Click the Add button.



3 Complete the fields provided to create a new instance.

If no task is associated with the event, you can complete all applicable fields to document the event now, if known. If not known, you can simply save the entry and return later to edit it to provide the information.

If a task will be triggered from the event, leave the information fields that need to be completed by the task assignee blank.



4 Click Save to save the record.

A confirmation message appears. Click Back to Data Edit to return to the Event Log entries, where you will see the instance you created listed.

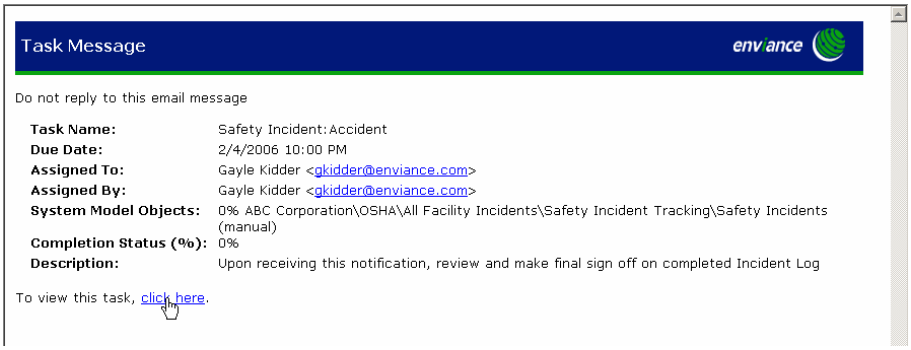
If a task is associated with the event, an email will be sent out from the system shortly to inform the task assignee.

Completing an Event-Triggered Task

When a task is associated with an event, the task will be automatically triggered each time an event instance is recorded (i.e., an Event Log entry is made). A task notification email is sent to the task assignee, and the event fields necessary to document the event are included in the task completion form.

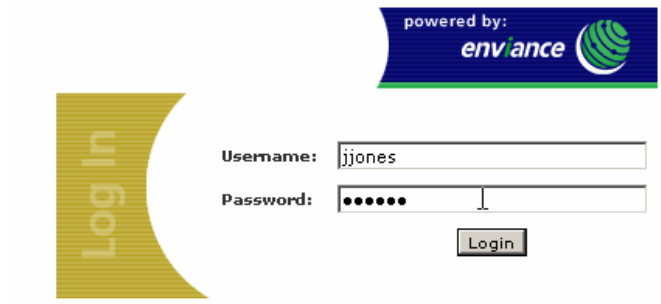
To complete the task to document an event:

1 Click the link at the bottom of the email task notification to view the task.

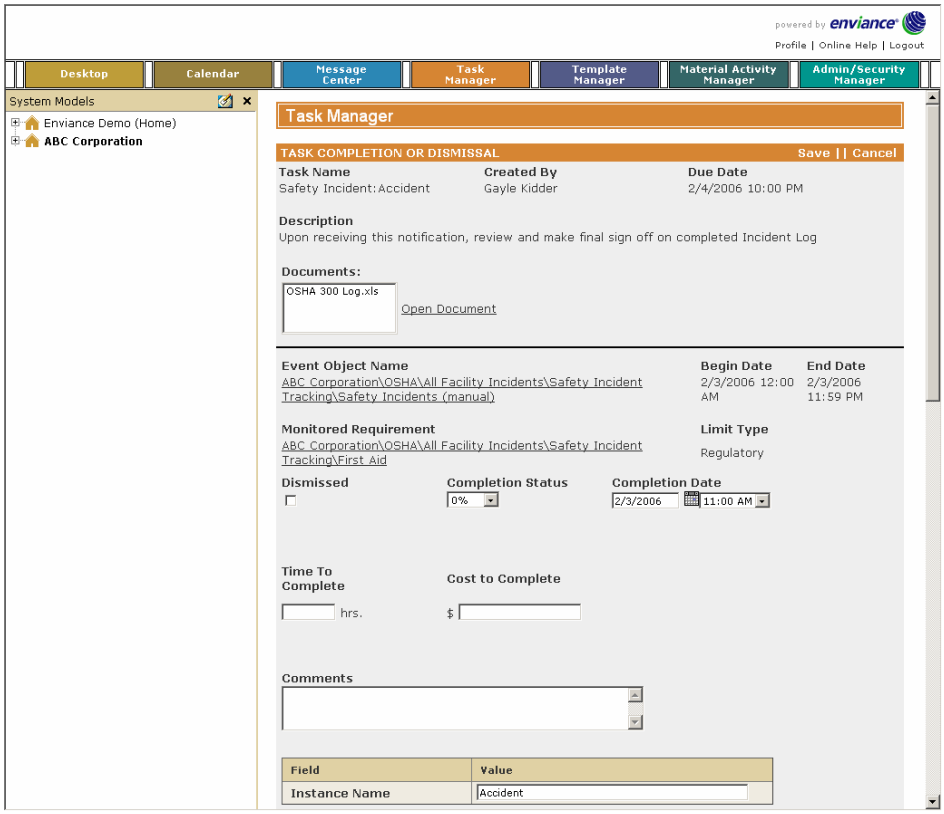


The Enviance login page appears in the web browser.

2 Log into the system with your user name and password.



If login is successful, the task completion form appears.



3 Complete the fields to document the event at the bottom of the form.

If you do not have all the information yet to complete the task, you can enter partial information and just click Save. You can return later by the same method to complete the information and close the task.

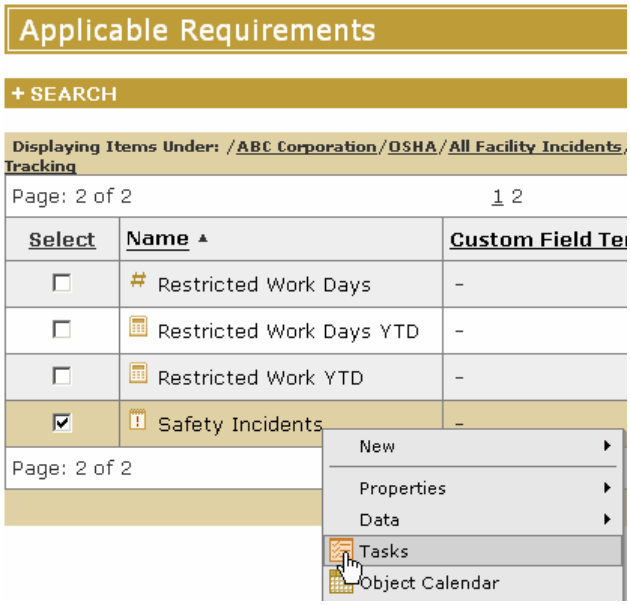
4 When the event has been documented as required, close the task by setting the completion status to 100% and entering the completion date.

5 Click Save.

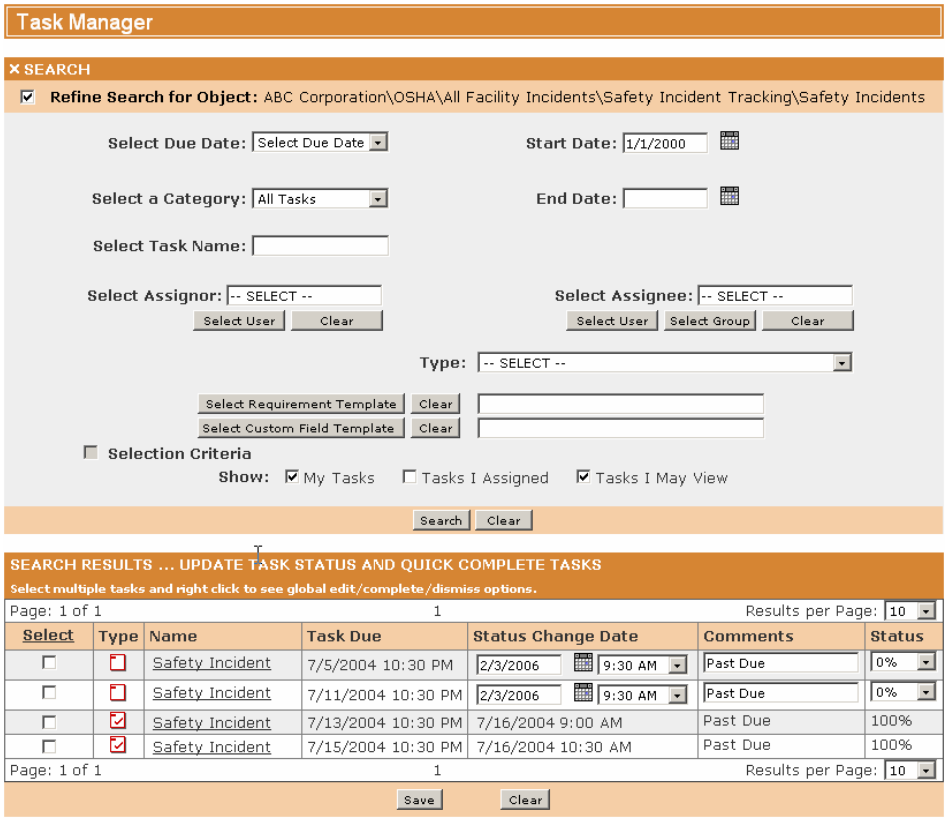
You can also access the task completion from the system, by viewing tasks for the Event Log.

To view tasks for an Event Log:

1 Right click the Event Log and choose Tasks.

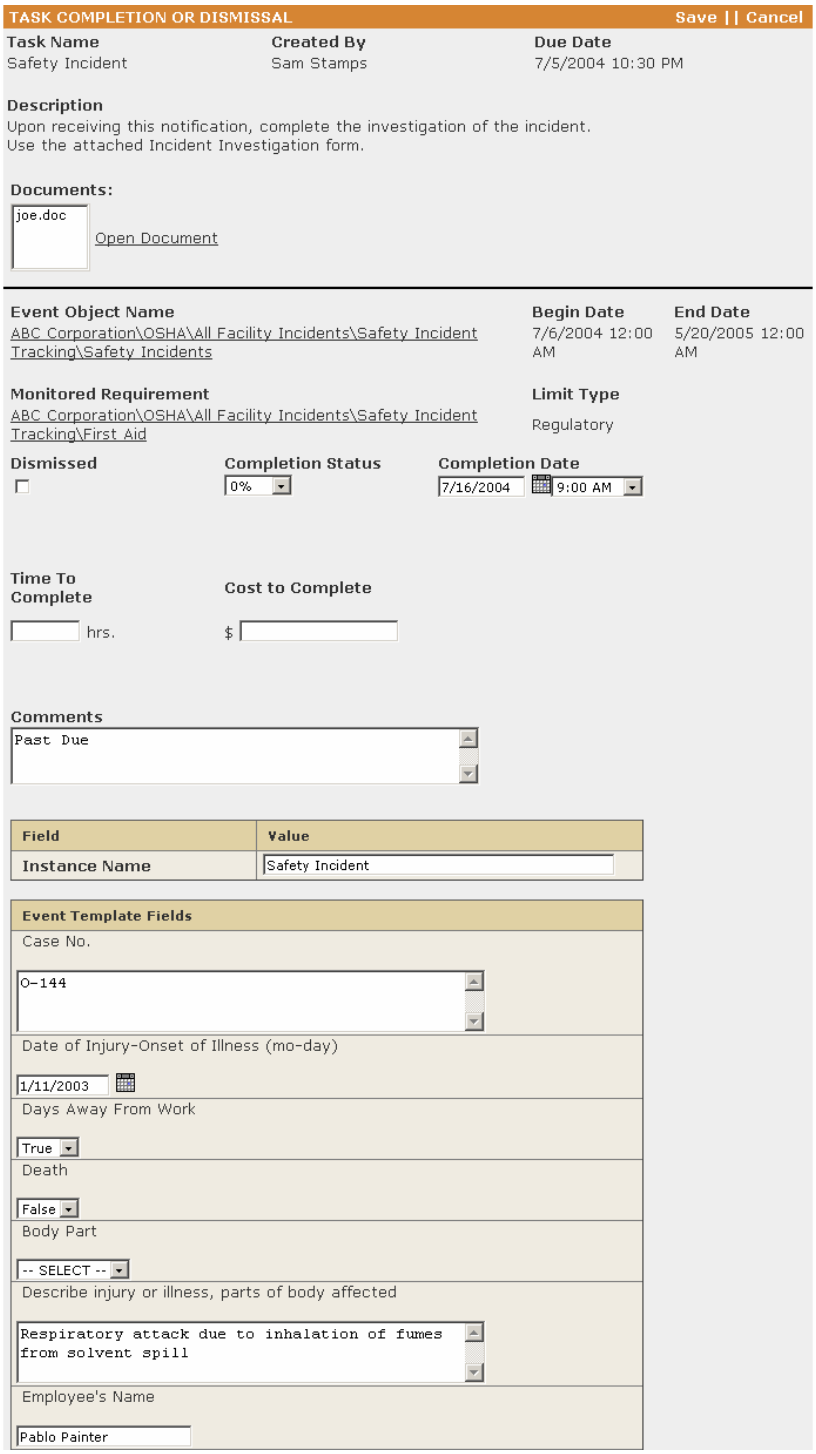


Tasks associated with the Event Log are shown. Each task represents an event instance and corresponds to a record in the Event Log. The usual default filters are in effect in Task Manager – by default, the list is filtered for tasks assigned to the you, with due dates starting from today. You will need to expand the Search pane and change the search criteria to see older tasks. Initially, you can change the Start Date to an earlier date and select Tasks I May View, then click Search.



2 Click the task link to open the task completion form.

At the bottom of the Task Completion form are the fields to complete to document the event. When the task is completed and saved, the information for the event instance is saved in the Event Log.



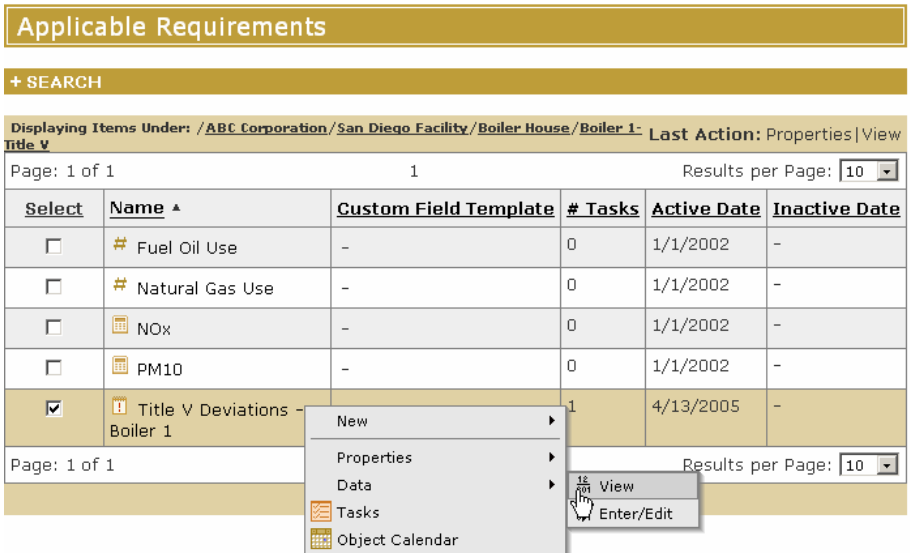
Automatic Events for Data Exceedances

Automatic Event Logs associated with numeric requirements are used to track deviations, or periods of time when a requirement is not determined to be in compliance. Event instances are then triggered automatically whenever data exceeds established

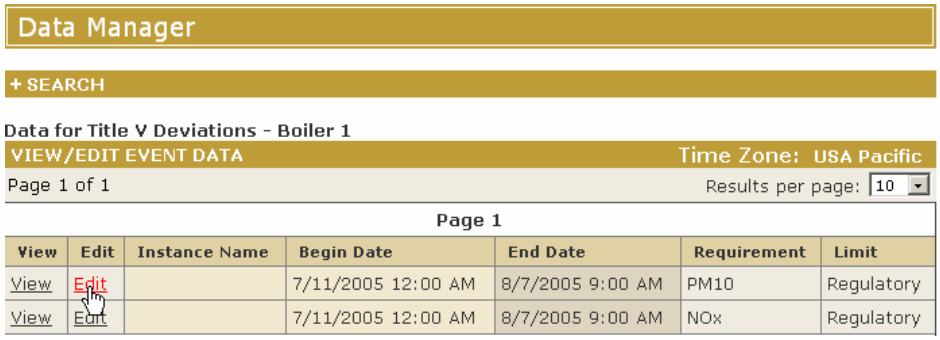
limits. If a task is associated with the Event Log, a task will also be automatically triggered when an event occurs, as shown in the previous section.

The Accept as Deviation field allows you to decide whether the event instance should be treated as a true deviation or not. The data in the Event Log can then be extracted for compliance reporting purposes.

1 In the Applicable Requirements view, right click the Event Log and choose Data > View.



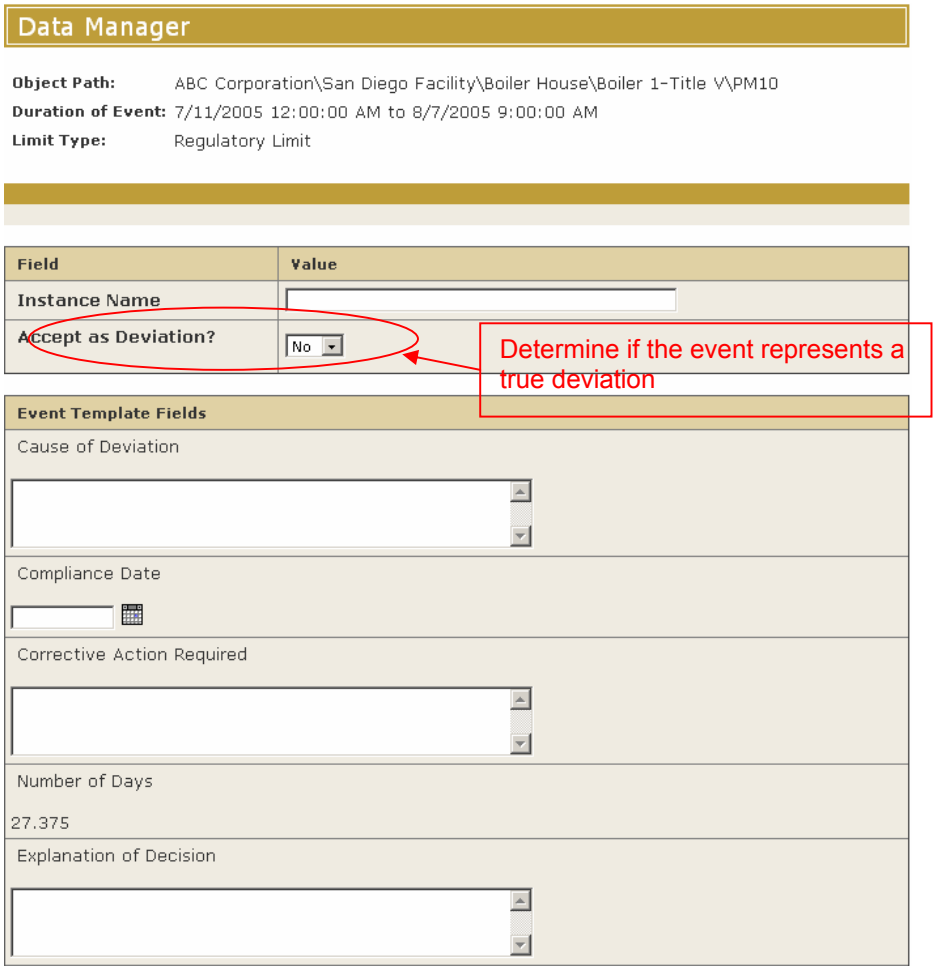
Each row (or event instance) records a data limit exceedance for one of the monitored requirements. The table shows the monitored requirement concerned, the type of limit exceeded (Regulatory or Internal) and the duration of the event (Begin and End dates).



2 Select the Edit link for an event instance.

The fields available to document the event are shown. The Accept As Deviation field allows you to decide if this is a true deviation or not. For example, the instance may have been caused by an equipment malfunction, so it may be unnecessary to make a report to an agency due to a regulatory exemption. If the value for this field is No, the incident will not be counted for reporting purposes in the compliance report.

If a task is associated with the event, these fields will appear in the task completion form for the assignee to complete. (See the previous section, Completing an Event Triggered Task.).



Automatic Event Logs for Non-Numeric Requirements

In addition to monitoring numeric requirements for data exceedances, an automatic Event Log may be used to monitor a non-numeric requirement for periods in which the requirement may out of compliance. An event will be automatically triggered any time a task associated with the requirement has the compliance status Not Determined.

Like events triggered by data exceedances, the event may have the Accept as Deviation field so that the task assignee may decide if the event represents a true deviation or not. The event instance may be documented through a task, or by editing the Event Log entry, as appropriate.

Create an Event Report

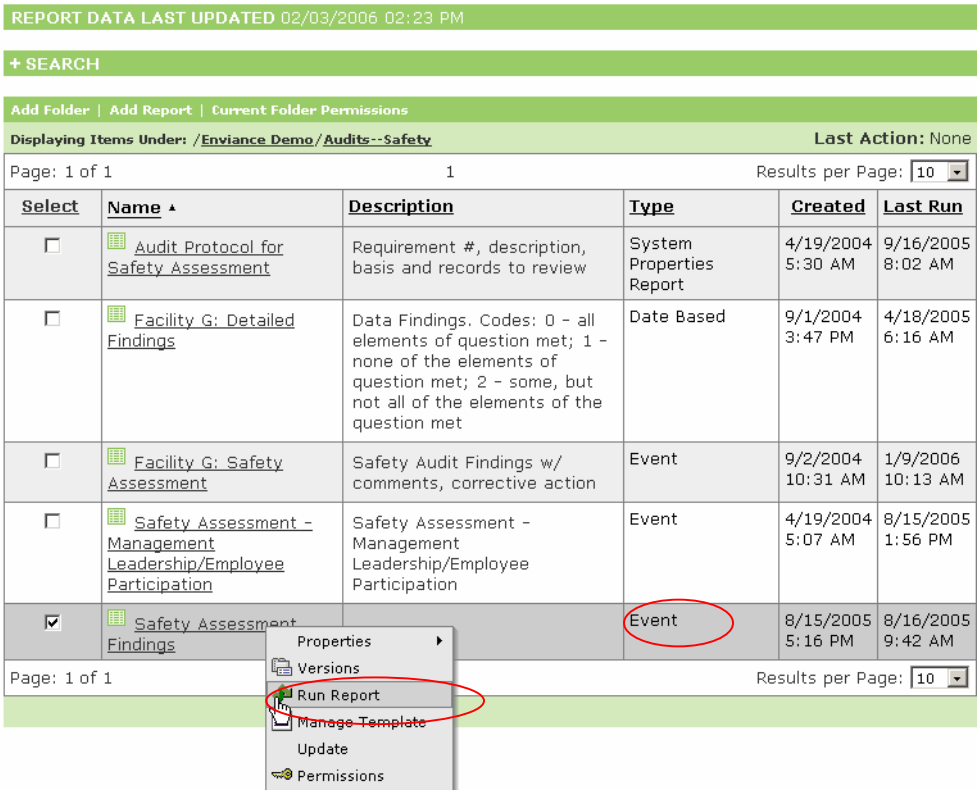
Event Reports are useful for extracting information on incidents which can be used for required reports such as a Title V Deviation Report.

- Expand the Reports section of the System Model tree to browse the report folders.

3 Select a folder to view the reports it contains.

The Type column shows what type of report each is.

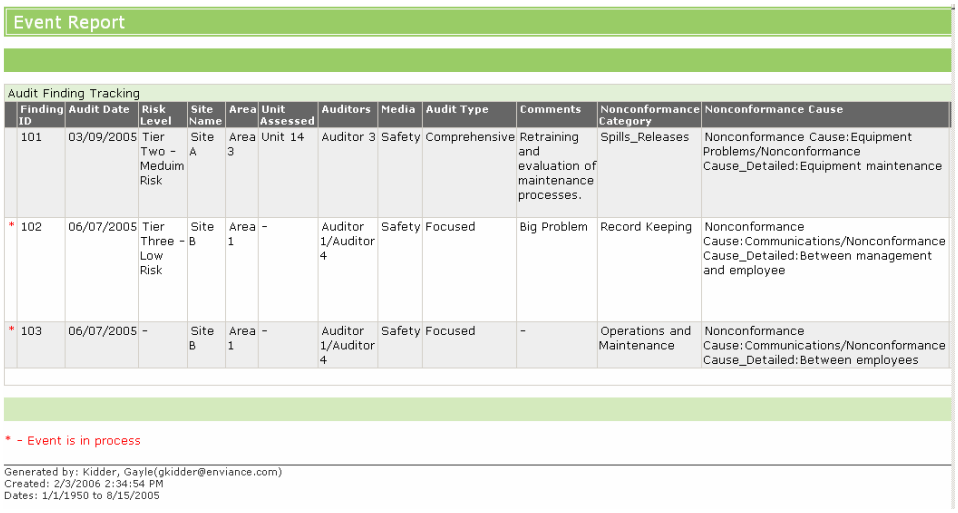
4 Right click an Event report and choose Run Report.



A new window appears where you can select the criteria for the report.

5 Choose the dates for the report and the output format and click Run Report.

If you choose HTML format, the report is displayed directly in the browser. If data is too large to be displayed in the browser, you will be prompted to choose less data, or download the report in Excel format. For more information on downloading reports to Excel, see the Reports section of the training guide.



Event Report

Audit Finding Tracking

	Finding ID	Audit Date	Risk Level	Site Name	Area	Unit Assessed	Auditors	Media	Audit Type	Comments	Nonconformance Category	Nonconformance Cause
	101	03/09/2005	Tier Two - Meduim Risk	Site A	Area 3	Unit 14	Auditor 3	Safety	Comprehensive	Retraining and evaluation of maintenance processes.	Spills_Releases	Nonconformance Cause:Equipment Problems/Nonconformance Cause_Detailed:Equipment maintenance
*	102	06/07/2005	Tier Three - Low Risk	Site B	Area 1	-	Auditor 1/Auditor 4	Safety	Focused	Big Problem	Record Keeping	Nonconformance Cause:Communications/Nonconformance Cause_Detailed:Between management and employee
*	103	06/07/2005	-	Site B	Area 1	-	Auditor 1/Auditor 4	Safety	Focused	-	Operations and Maintenance	Nonconformance Cause:Communications/Nonconformance Cause_Detailed:Between employees

* - Event is in process

Generated by: Kidder, Gayle(gkidder@enviance.com)
Created: 2/3/2006 2:34:54 PM
Dates: 1/1/1950 to 8/15/2005

LESSON RECAP

- An Event Log stores data related to incidents, such as health and safety incidents and deviations for monitored requirements.
- Manual Event Logs allow you to keep a log of reportable incidents and resolution details.
- Tasks can be associated with an event to allow for quick response to potential incidents and documentation.
- Automatic events that are triggered when data limits are exceeded are used to keep a record of potential deviations for reporting purposes. You can decide if an event represents a true deviation or not.
- Automatic events can also be triggered when a task associated with a non-numeric requirement is potentially out of compliance.
- Event Reports help you manage incidents and extract the information you need for reporting requirements.

Running Reports

Report Manager allows you to design, preview and print the information you need for either your internal information needs or for filing purposes.

Reports in Report Manager are organized into report folders. The report folders and reports that you see depend on the report permissions set up by your administrator.

You can generate reports in HTML or Microsoft® Excel formats using data stored in the System.

OBJECTIVES

When you have completed this Lesson, you will know how to:

- ⇨ View the pre-configured reports in the system that are available for you to run.
- ⇨ Search or browse to find a report
- ⇨ Run a report and view the output in HTML
- ⇨ Download a report in Excel format

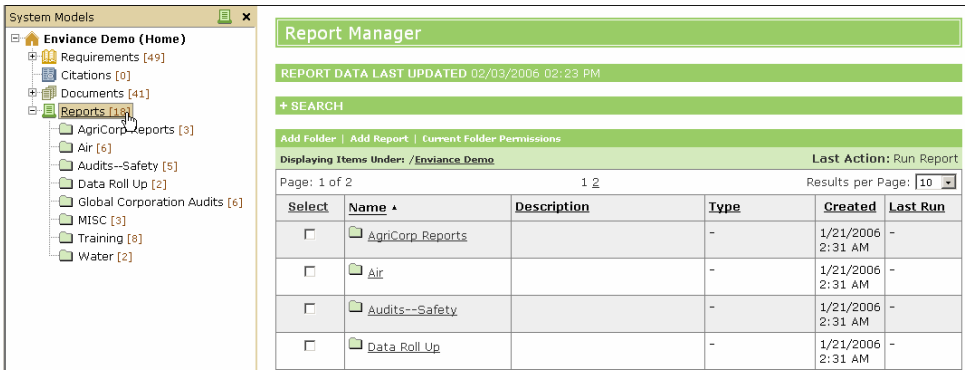
Viewing Reports

Reports can be pre-configured in the system so that they may be run at any time by users who have been given permission to the report. When you run a pre-configured report from Report Manager, you only need to choose the dates to include in the report.

The reports that are available to you are shown in Report Manager. The reports you see in Report Manager depend on your permissions.

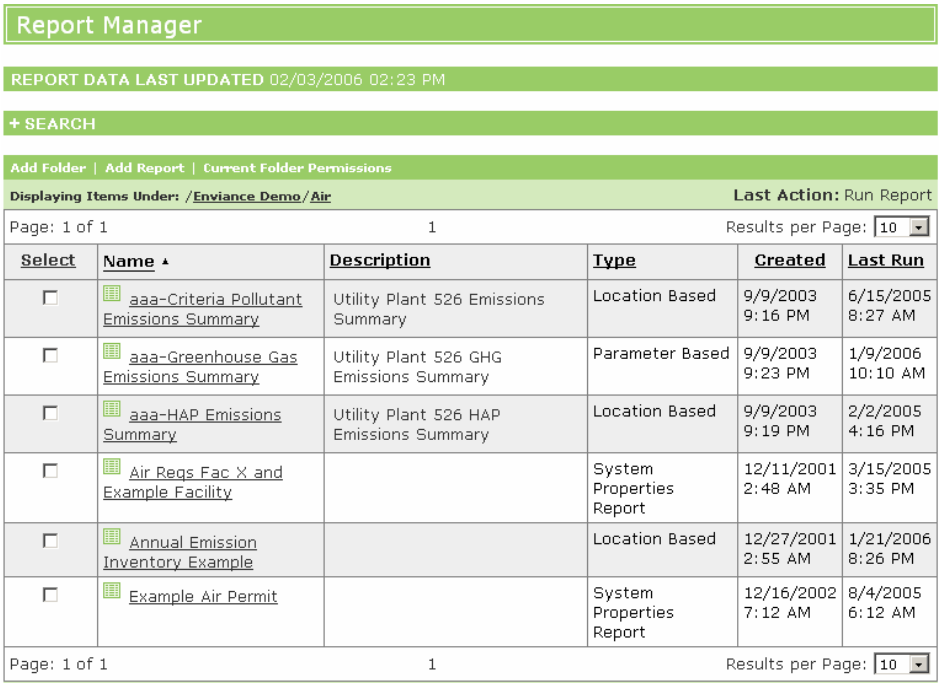
To view available reports:

1 Click on the Reports section of the System Model tree and expand the section to see the available report folders.

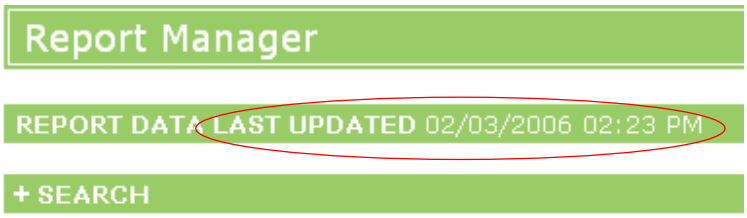


2 Select a folder to view the reports it contains.

The Type column indicates what type of report each is. You can also see at a glance when it was created and when it was last run.



The top of the Report Manager page contains potentially important information as to when the report data was last updated. If you are trying to run a report that include data that was recently input, it may not appear because the data has not yet been updated in the report database.



Search Reports

You can search for a report by expanding the Search pane and setting the search criteria to find the report you want.

To search reports:

1 Click the plus sign (+) in the Search bar to expand the search pane.

2 In the search pane, choose your search critieria.

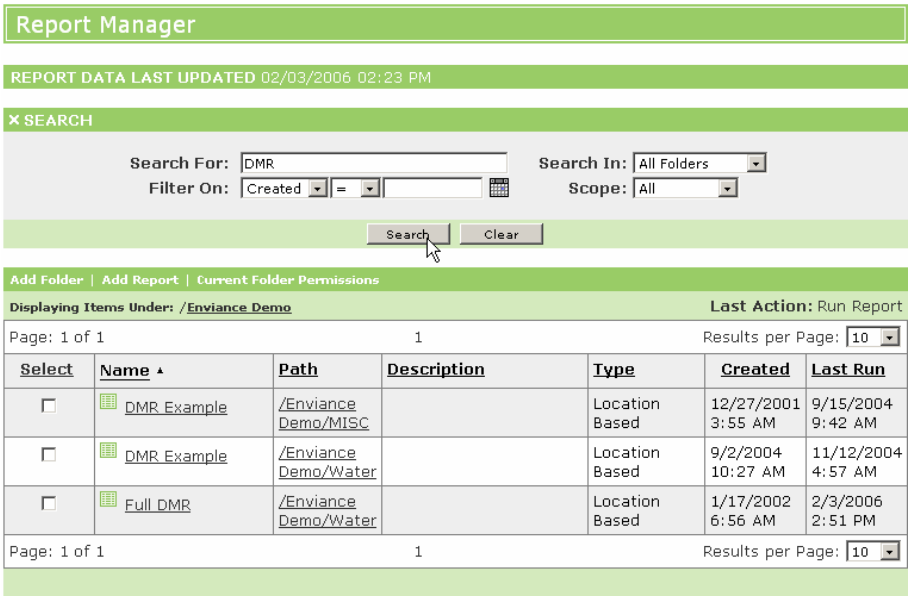
In the Seach For box, you can enter a text string to search for. The Scope field lets you choose whether to search to report name or description or both.

You can choose whether to search the current folder, the current branch (current folder and all subfolders), or all folders.

You can also filter on creation date or date last run, with different comparison criteria.

3 Click Search.

Reports matching your search criteria are displayed in the results list.

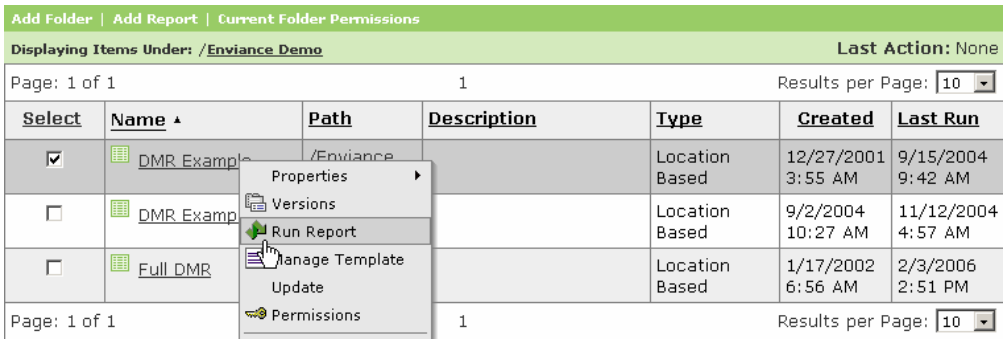


Running a Report

The pre-configured reports that have been created for the system are shown in Report Manager. These reports may be run by any user who has the appropriate permissions for the report. The data and display options have been pre-selected and the user only needs to select the dates to include in the report.

To run a report:

1 Right click the report in the Report Manager list and choose Run Report.



The report selection criteria opens in a new window.

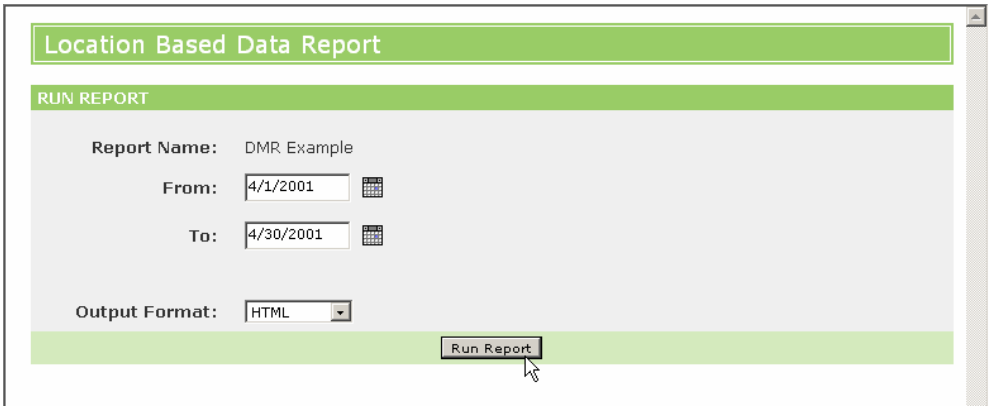
2 Select the dates to report on, in the From and To windows. Click the calendar button to select a date from the calendar.

3 Choose the desired output format for the report. The default report format is shown in the Output Format box. You may run a report in HTML format, or in Excel format.

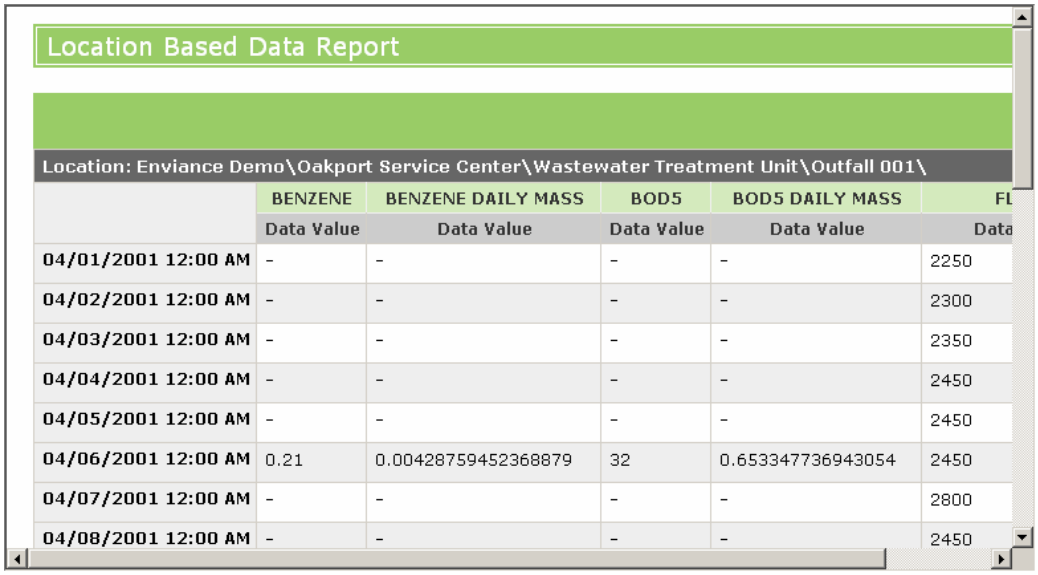
HTML format outputs the report directly in the browser window.

Excel format outputs the report data as an Excel file. You may choose to view the report file directly, or to save the file to your computer for viewing later in Excel. If the report includes a large amount of data, you will be required to download the file first.

4 Click Run Report.



If you choose HTML format, the report appears in a separate browser window. Close the report window when you are finished viewing the report.



	BENZENE	BENZENE DAILY MASS	BOD5	BOD5 DAILY MASS	FL
	Data Value	Data Value	Data Value	Data Value	Data
04/01/2001 12:00 AM	-	-	-	-	2250
04/02/2001 12:00 AM	-	-	-	-	2300
04/03/2001 12:00 AM	-	-	-	-	2350
04/04/2001 12:00 AM	-	-	-	-	2450
04/05/2001 12:00 AM	-	-	-	-	2450
04/06/2001 12:00 AM	0.21	0.00428759452368879	32	0.653347736943054	2450
04/07/2001 12:00 AM	-	-	-	-	2800
04/08/2001 12:00 AM	-	-	-	-	2450

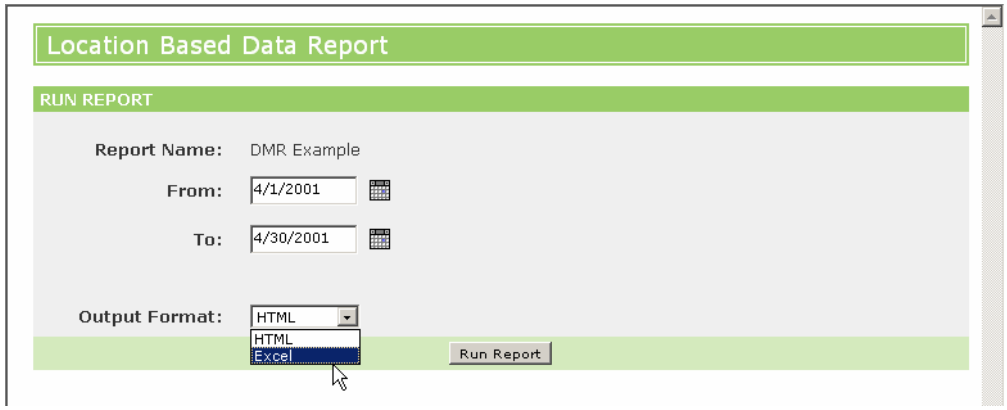
If the Excel output format is chosen, a dialog appears asking whether you want to open the file for viewing, or save the file to your computer.

Downloading a Report in Excel Format

Some reports are configured to be run and output as Excel data spreadsheets by default. If a report includes a large amount of data, you may also be required to download the report.

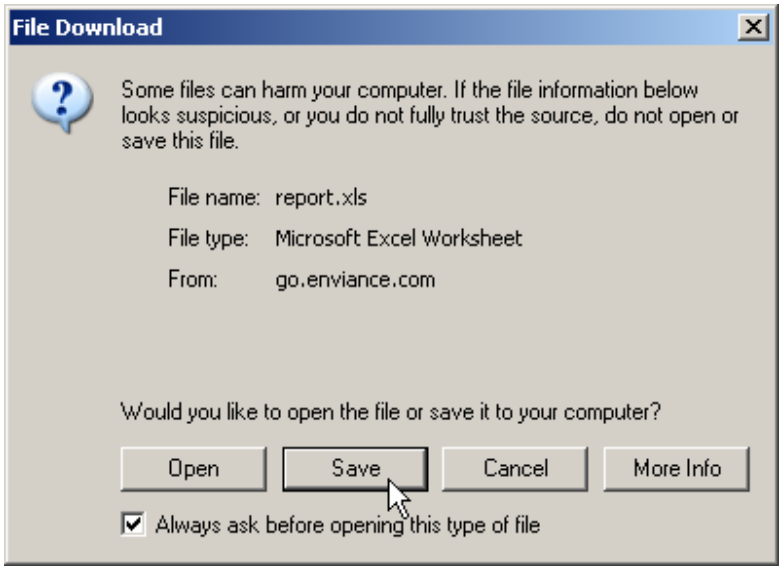
To output a report in Excel format:

1 After selecting the dates, choose the Excel option for the Output Format.



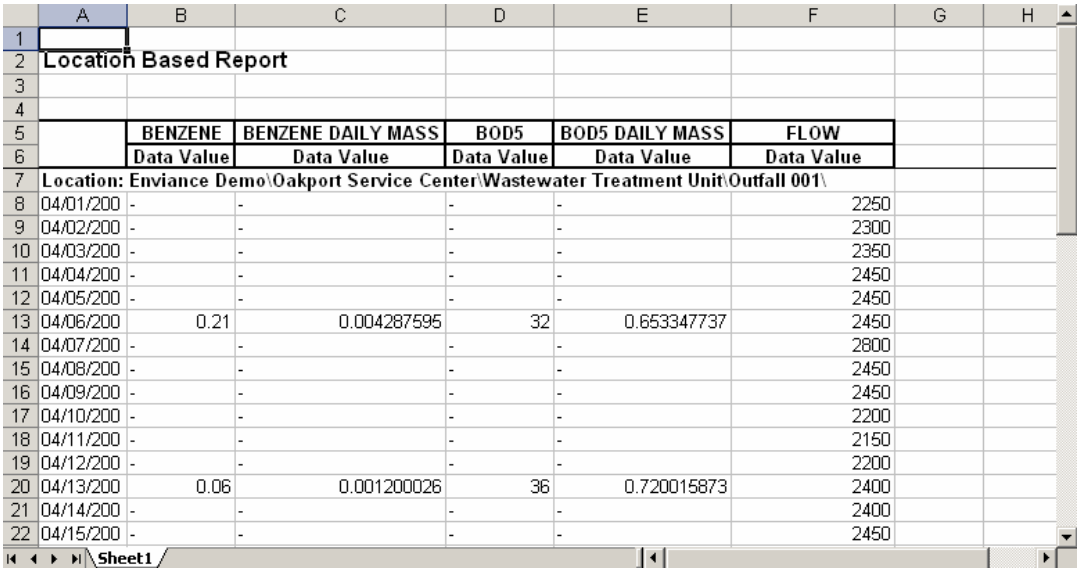
2 Click Run Report.

A dialog appears asking if you want to open the file or save it to your computer.



3 Choose Save to save the file to your computer, and choose a location to save it to. You can then open the file with Microsoft Excel.

Or, If the data is not too large, you can open the file directly for viewing. The Excel window will appear in your browser, displaying the file.



	A	B	C	D	E	F	G	H
1								
2	Location Based Report							
3								
4								
5		BENZENE	BENZENE DAILY MASS	BOD5	BOD5 DAILY MASS	FLOW		
6		Data Value	Data Value	Data Value	Data Value	Data Value		
7	Location: Enviance Demo\Oakport Service Center\Wastewater Treatment Unit\Outfall 001\							
8	04/01/200	-	-	-	-	2250		
9	04/02/200	-	-	-	-	2300		
10	04/03/200	-	-	-	-	2350		
11	04/04/200	-	-	-	-	2450		
12	04/05/200	-	-	-	-	2450		
13	04/06/200	0.21	0.004287595	32	0.653347737	2450		
14	04/07/200	-	-	-	-	2800		
15	04/08/200	-	-	-	-	2450		
16	04/09/200	-	-	-	-	2450		
17	04/10/200	-	-	-	-	2200		
18	04/11/200	-	-	-	-	2150		
19	04/12/200	-	-	-	-	2200		
20	04/13/200	0.06	0.001200026	36	0.720015873	2400		
21	04/14/200	-	-	-	-	2400		
22	04/15/200	-	-	-	-	2450		

Sheet1

LESSON RECAP

- Pre-configured reports help you extract the data you need quickly from the system.
- You can run a pre-configured report from Report Manager.
- You may view report results in HTML format or Excel.
- Reports output in Excel format may be downloaded and saved to your computer.