

Section One

Basic Operations

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Internet Explorer Settings



Internet Explorer (IE) Settings

For use with Microsoft™ Internet Explorer version 7.0 and above. Do not utilize with any other browser as data corruption and unexpected errors may occur.

It is likely that internet browser software was installed with the default settings. The default settings need to be adjusted for web-based data entry operations. Making the following adjustments allows the application and database to communicate in ‘real-time’ as information is entered and saved to the database.

Setup:

1. Open Internet Explorer (IE). Using the Main Tool Bar, Click Tools, point to Internet Options (reference figure 1-1).
2. In the Internet Options Panel (middle section of the window under ‘Temporary Internet Files’, click the Settings button (reference figure 1-1A).

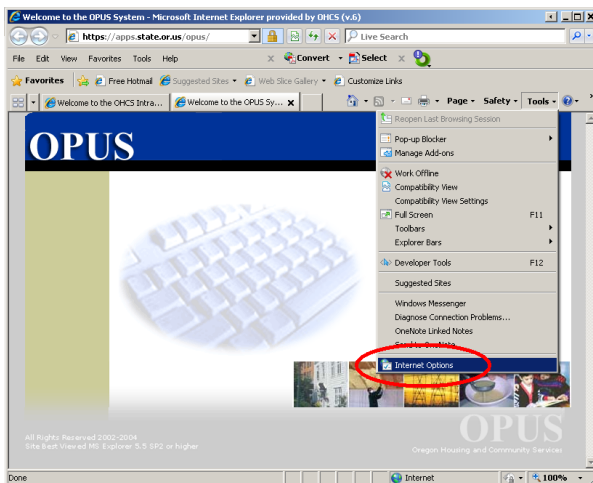


Figure 1-1: internet Options screen.

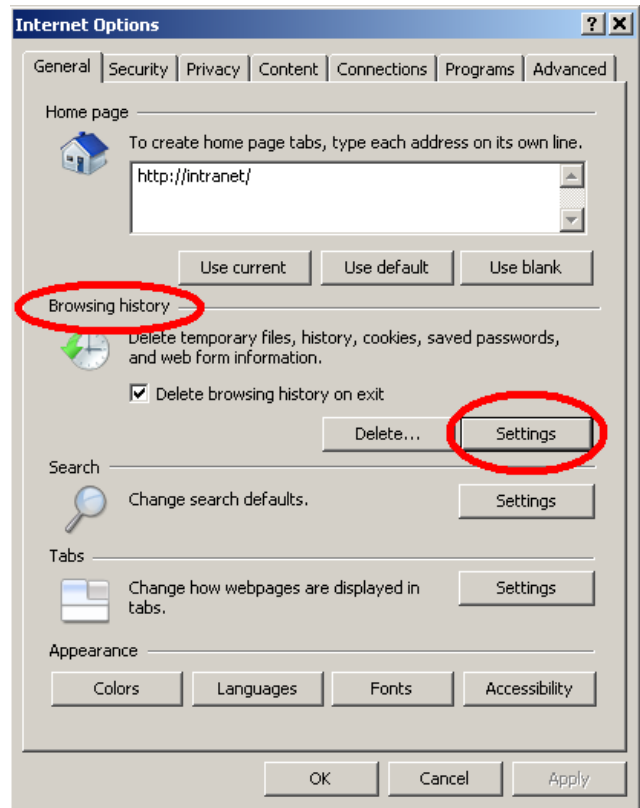
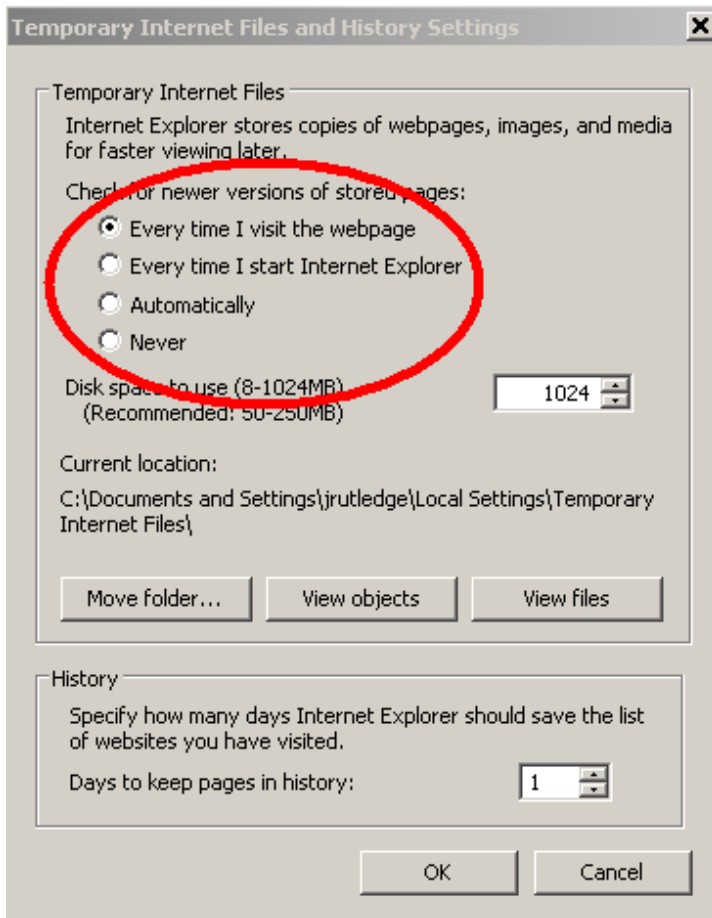


Figure 1-1A: Internet Options Advanced Settings

3. On the Internet Options Panel, in middle section of window under Temporary Internet Settings, click the Settings button (reference figure 1-1).

4. In 'Settings' screen, click the option "Every Visit to the Page", then click "OK" button (reference figure 1-2). You are ready to login using OPUS.



Depending on the computer and IE version, the 'Temporary Internet Files and History Settings' view can vary in appearance and/or wording.

Regardless; the 'Check for newer versions of stored pages;' Must be:

"Every time I visit the webpage"

Figure 1-2: Settings Panel

5. Go to the "Advanced" tab (reference figure 1-3). Look for "Java (Sun) (reference figure 1-3). If Java (Sun) isn't there, double check to see if Microsoft VM Java is checked. If so, this is where the printing problem is. The reports won't print properly with VM Java. Symptoms: pages print landscape and portrait, the print could be cut off or print would be scrambled.

Java (Sun) Java 1.6.0_20 is the latest program. Reference the listed link to access the Java page for quick access: <http://java.com>

If possible, each agency's IS staff should be able to assist the user(s) in downloading on each computer unit (PC). When downloading there will be two security certificates. See example below. The first one is the standard agreement to using the software, check "always". The second security certificate is for the report plug-in, again check "always".

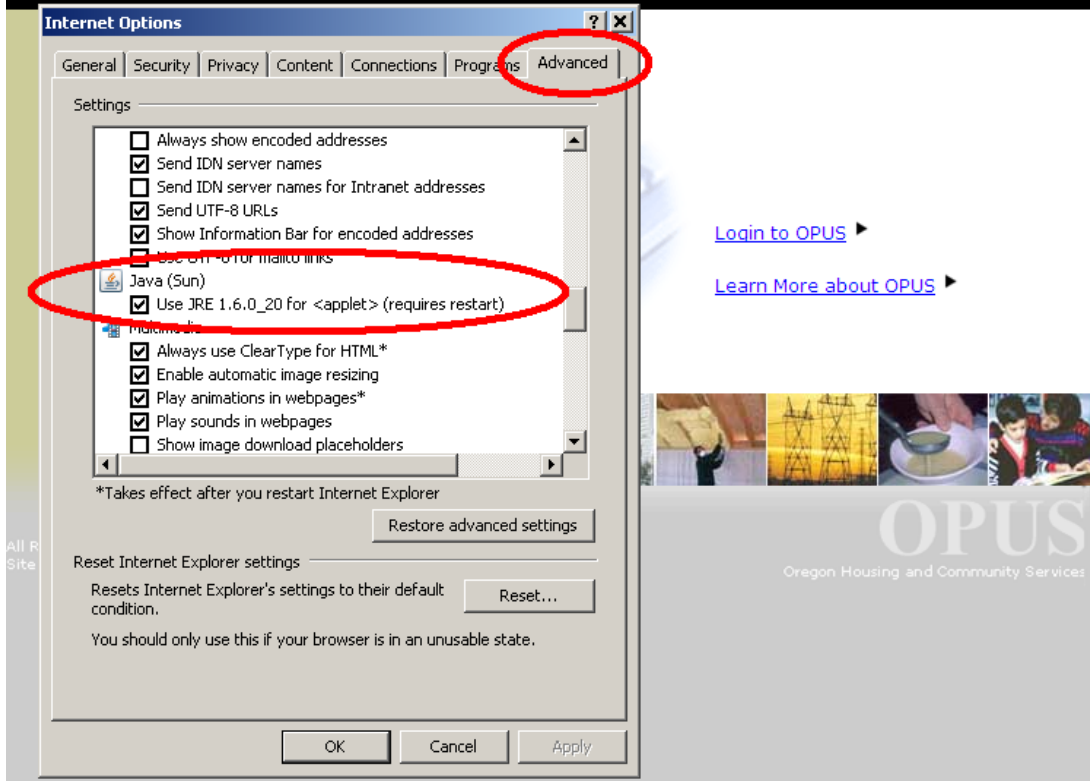


Figure 1-3: Settings Panel - Advanced

Java Security Update

Make sure all your browser windows are closed before proceeding.

1. Go to: Start button (usually located in the lower left corner of your monitor), go to 'setting', to 'control panel'.
2. If you are already in classic view skip this step. In the upper left corner of the screen click on 'Switch to Classic View'.

3. Double click on the Java Icon



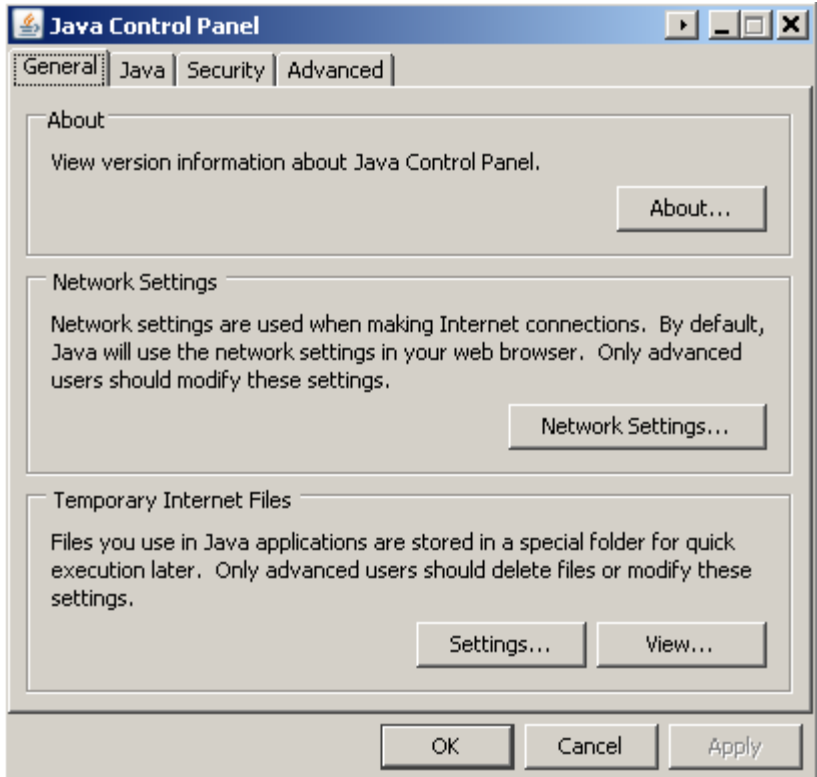


Figure 1-4A: Java Control Panel – General

4. Go to the “Advanced” tab (reference figure 1-4B). Click on the + sign in front of ‘Security’.

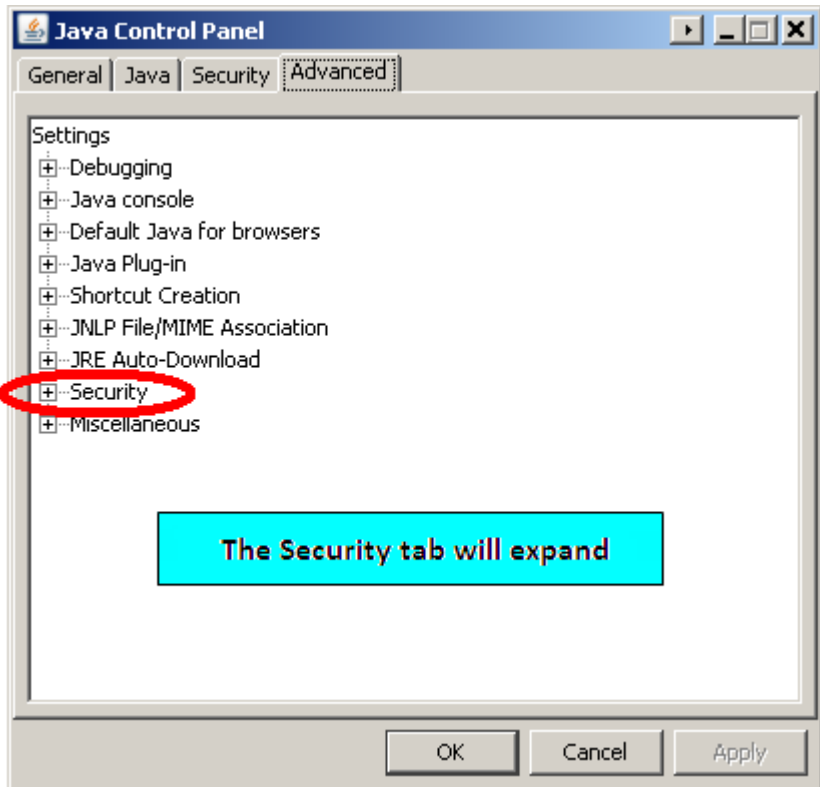


Figure 1-4B: Java Control Panel – Advanced

4. Click on the + sign in front of 'General' (reference figure 1-4C)

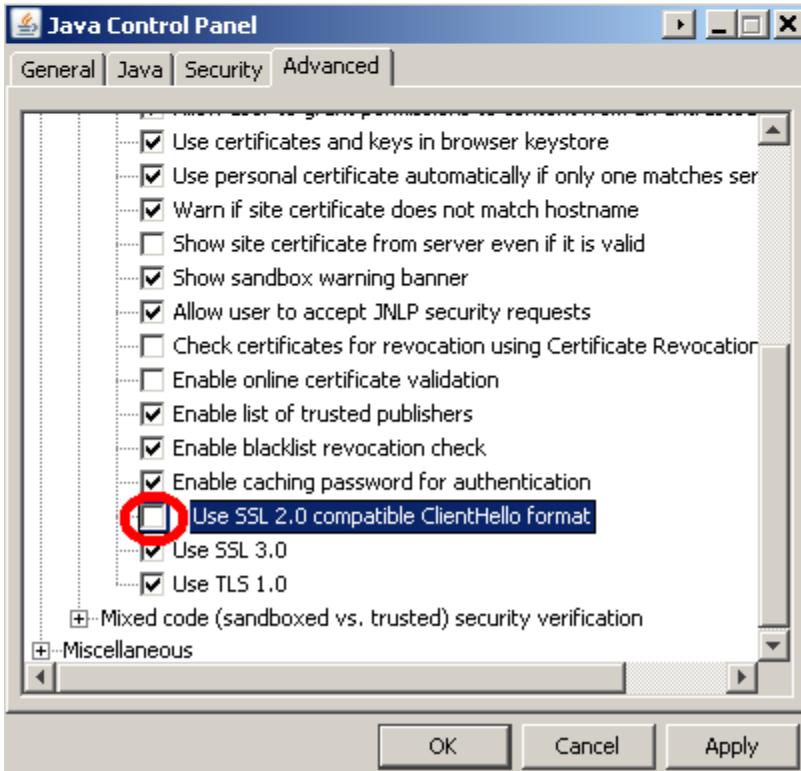
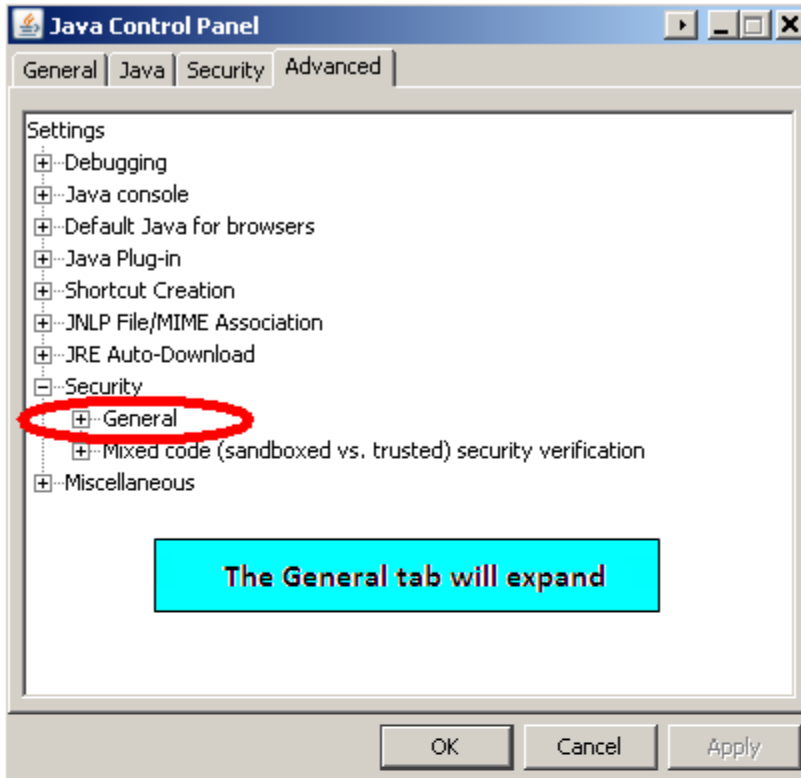


Figure 1-4C: Java Control Panel – Advanced – Security and General Tabs expanded

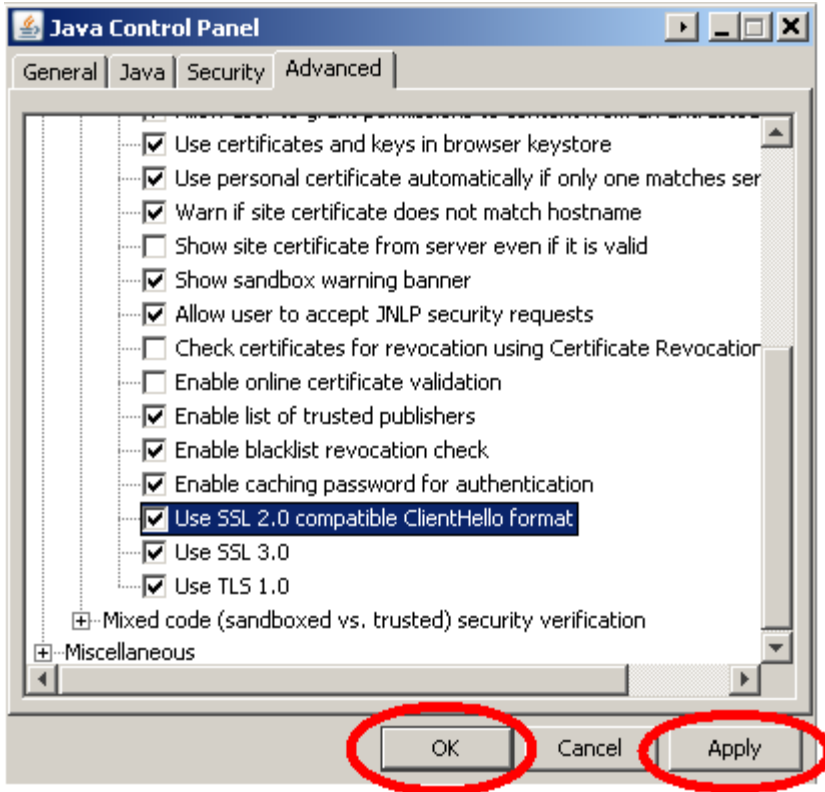


Figure 1-4D: Use SSL 2.0 compatible ClientHello format selection

5. Check the box highlighted above. Click on “Apply”, then “OK” (reference figure 1-4D)
6. Log into OPUS normally and run one of your reports. You should receive this pop up.

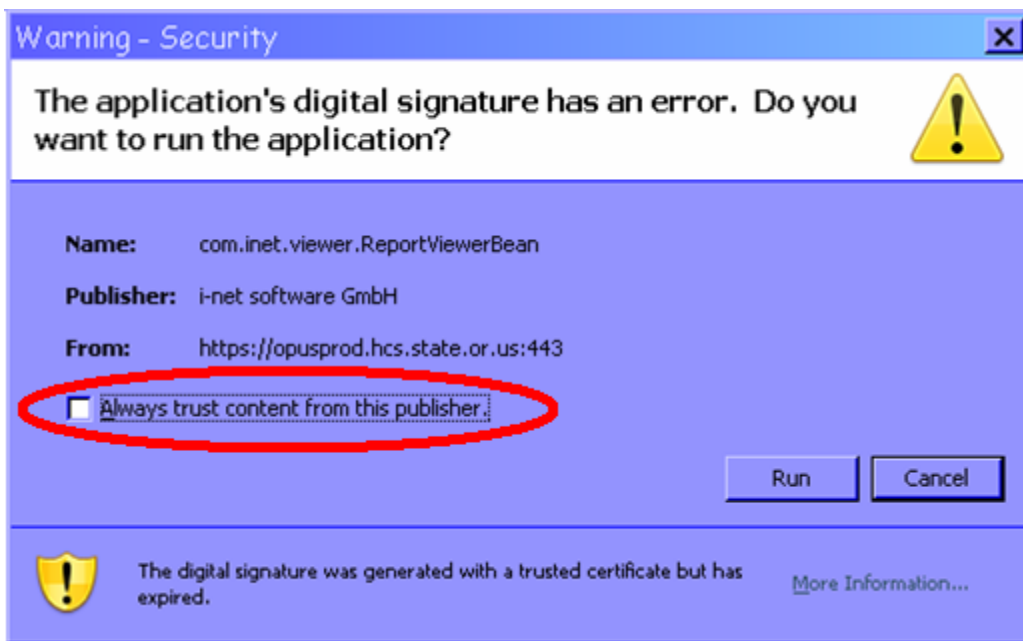


Figure 1-4E: Warning Security pop-up

7. Click on “Always trust content from this publisher.”

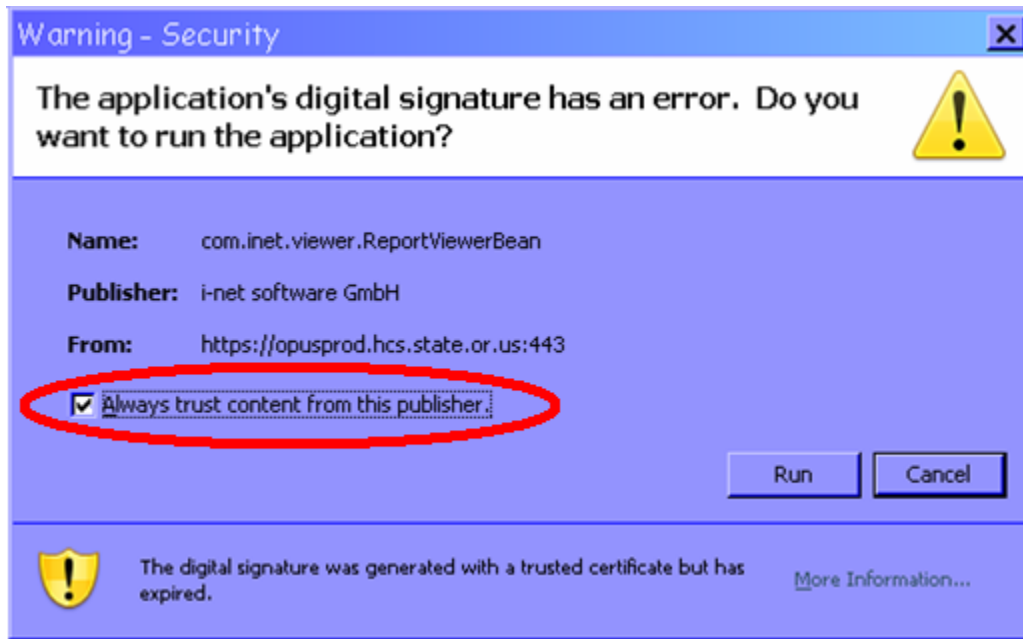


Figure 1-4F: Warning Security pop-up

8. Click on the “RUN” button and wait for the system to complete the process. Then you should be able to review your normal print window.
9. If you have any questions and if you have an IS person at your agency, ask for their assistance or contact

OPUS Helpdesk
opushelp@hcs.state.or.us
1-800-453-5511 Option #6

Logging into OPUS

Setup:

1. Start Internet Explorer (IE)
2. Type the address: <http://apps.state.or.us/opus/>
3. A popup window will ask you to accept a security certificate, Click the 'OK' button. This is the security certificate to protect the database.
Note: Check the box next to the phrase, "In the future, do not show this warning", so that you will not repeatedly see the message popup on each visit to OPUS.
4. On the OPUS screen, click the 'Login to OPUS' link (*reference figure 1-5A*).



Figure 1-5A: OPUS Main Page

5. On the 'Login' screen, type the 'User Name' and the password (*reference figure 1-5B*). For new users, a temporary password automatically sent via email from the OPUS System when a new user is created or password is reset (NOTE: Temporary passwords are valid for 24 hours from issue date/time). The user will required to change it on the next screen. The 'Password' *is* case sensitive.



Figure 1-5B: Login screen

6. Click the 'Login' button.

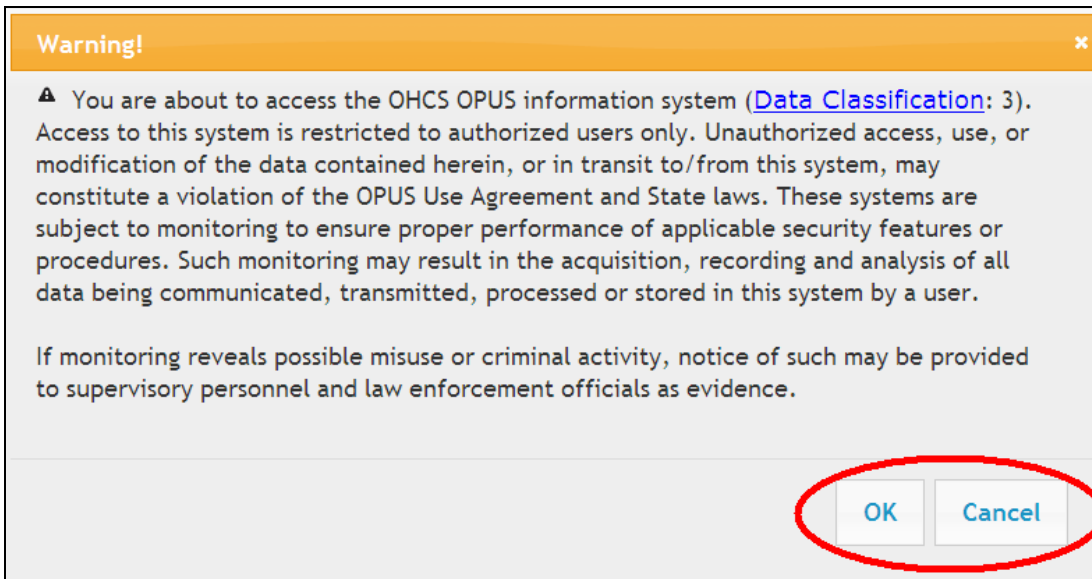


Figure 1-6: Data Classification Warning Screen

7. The Data Classification 'Warning' screen will appear. Click 'OK' to proceed or 'CANCEL' to return to the 'Login' screen (*reference figure 1-6*)
8. The 'Change Password' screen will appear. For the 'Old Password'; type the temporary (default) password again (*reference figure 1-7*).

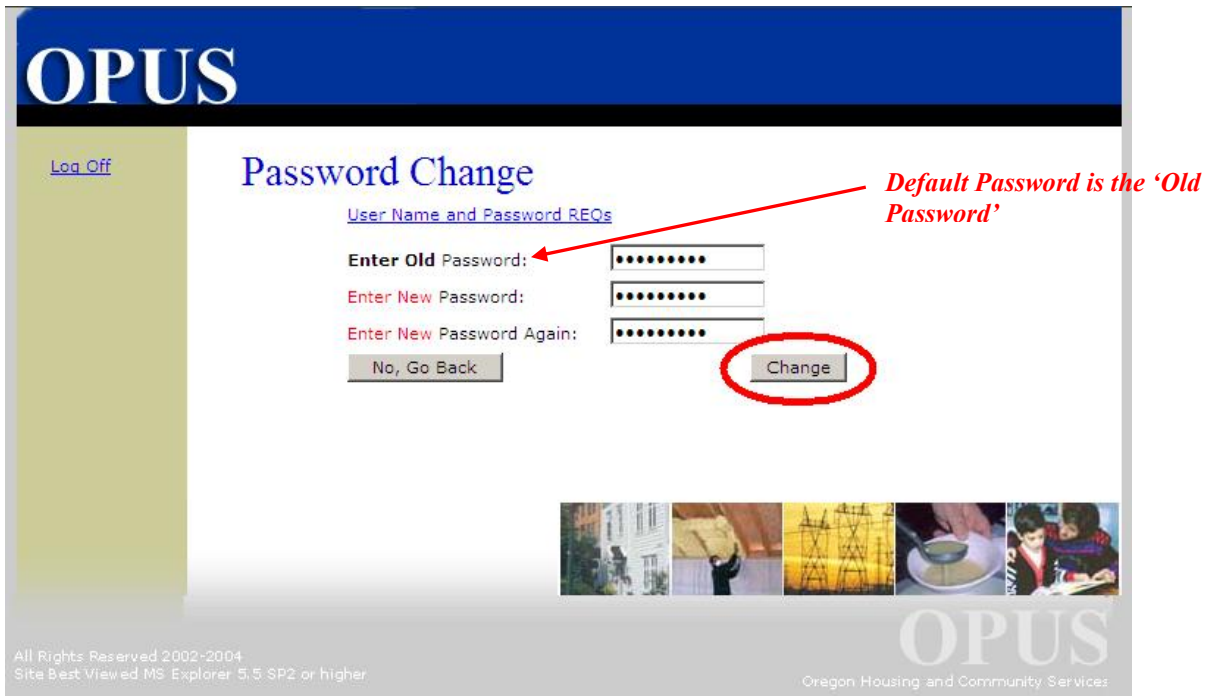


Figure 1-7: Password change screen.

9. Type a new password (this will be the permanent one to use on a regular basis unless there is a password reset). Permanent passwords need to be at least eight (8) characters, at least one upper-case letter, at least one lower-case letter, and at least one number or special character in the middle somewhere (characters such as #, *, -, @, \$). A password cannot begin with a number.
10. In the next box, re-type your new password, to confirm.
11. Click the 'Change' button. The 'Agency & Module Select' screen will appear. Some OPUS users have more than one module to work in, if so, the user has the opportunity to select the module they are approved to work in. Users with one module won't need to do anything except click 'submit'. If a user has multiple modules, use the dropdown button in 'OPUS Module' to select the required module then click 'Submit' (*reference figure 1-8*).

Agency & Module Select

Agency: OHCS

OPUS Module: WEATHERIZATION

Submit

Data Classification: 1

Timeout: 18:21

Figure 1-8: Agency & Module Select screen.

12. After clicking on the 'Submit' button, the 'Message of the Day' screen will appear.

Message of the Day

The 'Message of the Day' screen is known as the OPUS Home Page. Users will be alerted to notices of upcoming system-upgrades, program updates, and OPUS helpdesk procedures.

To initiate a client search, click the 'Search Client' link at the left or use the Main Menu, scroll over 'Client' and click on the 'Search' dropdown (*reference figure 1-9A*). To initiate a job search use the Main Menu, scroll over 'Program' and click on the 'Job Search' dropdown (*reference figure 1-9B*).



Figure 1-9A: Main Menu - Links for Search Client.

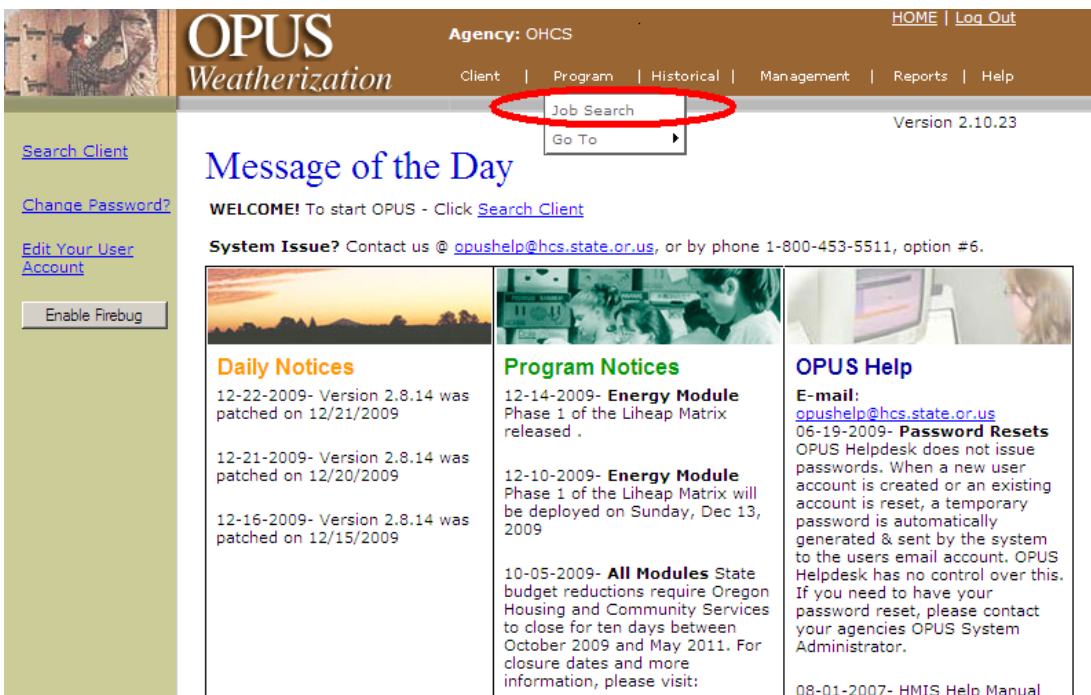


Figure 1-9B: Main Menu - Links for Program Job Search.

HOME and the Log Out Screen

The 'HOME' and 'Log Out' links are located on the Main Menu (*reference figure 1-9C*). The 'HOME' link goes to the "Message of the Day" screen.

The screenshot shows the OPUS Weatherization main menu. At the top right, the 'HOME | Log Out' link is circled in red. The main menu area is titled 'Message of the Day' and contains three columns of notices: 'Daily Notices', 'Program Notices', and 'OPUS Help'. The 'Daily Notices' column lists three updates from December 2009. The 'Program Notices' column lists several updates, including 'Energy Module' releases and 'Opus Unavailable Sunday' notices. The 'OPUS Help' column provides information about password resets and user manual updates. The footer of the page includes 'Oregon Housing and Community Services' and 'All Rights Reserved' information, along with 'HOME | Logout' links.

Figure 1-9C: Main Menu - Links for HOME and Log Out screen.

To end a session, click the 'Log Out' link. The 'Log Off' screen will appear. To continue logging off, click the "Yes" button. To cancel from logging off, and return to the last screen visited, click the "No, Go Back" button (*reference figure 1-9*).

The 'Log Off' screen has a five minute timer before logging the user totally out. All other OPUS screens have a 20 minute timer (*reference figure 1-11*). . If there isn't activity in a screen, the system will go to 'log out' (*reference figure 1-10*). .



Figure 1-10: Log Off screen

Types of Screens and Buttons

There are four types of screens: 'Search', 'View', 'Edit' and 'New'.

Search Screen

The 'Search' screen is used to search for existing database records.

Wild cards: OPUS supports the use of two types of wild cards on search screens. (% many characters, _ single character). All search screens automatically adds a % wild card in the background [unseen] to the end of the search parameter.

View Screen

A 'View' screen provides a view and/or review of information entered. This screen usually appears after saving data from a 'New' or 'Edit' screen.

Edit Screen

An 'Edit' screen displays existing database records so a user can edit regions/fields requiring updating and to be saved.

New Screen

A 'New' screen creates new records, a new client, a new residence, or a new payment.

The Save Button

On 'New' screens, the "Save" button is used to save information to the database. On 'Edit' screens, the "Save Changes" button is available.

Screen Timer

Each OPUS screen is programmed with a 20 minute timer (*reference figure 1-11*). If a screen is inactive for more than 20 minutes, the ‘Log Off’ screen will appear. The ‘Log Off’ screen has a five (5) minute timer. You will need to click either “No” or “Yes” within 5 minutes. If a response is not completed within five minutes, the session will end and the user will be logged off. To continue using OPUS, the user must re-log into OPUS. This process is a security measure programmed into the system to protect client and agency information.

Data Classification

Information, like other assets, must be properly managed from its creation to disposal. As with other assets, not all information has the same value or importance and therefore information requires different levels of protection. Information asset classification and data management are critical to ensure that the information assets have a level of protection corresponding to the sensitivity and value of the information asset. Descriptions of data classification levels can be found via the following link:

<https://apps.state.or.us/oaisdocs/usermanual/DataClassificationGuidelines.pdf>

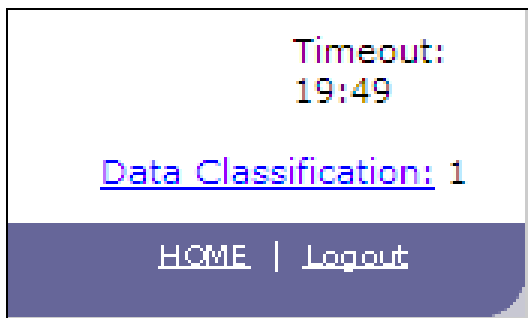


Figure 1-11: Screen Timer and Data Classification

Note: Log out of the system if leaving your desk for any amount of time. If you have saved each screen you have completed beforehand, you can log-in and go back to where you left off.

Screen Navigation

Main Menu, Left Navigation Bar (Left Nav Bar), and Drop-Down Menus
OPUS screens have two navigational sections: Main Menu and Left Navigation Bar.

Main Menu

The ‘Main Menu’ is the horizontal section located on the top area of the screen (*reference figure 1-12*). The active ‘Agency’ is displayed in the ‘Main Menu’. The main menu provides top level drop-down menus. Drop-down menus appear under: Client, Program, Fiscal, Management, Reports and Help

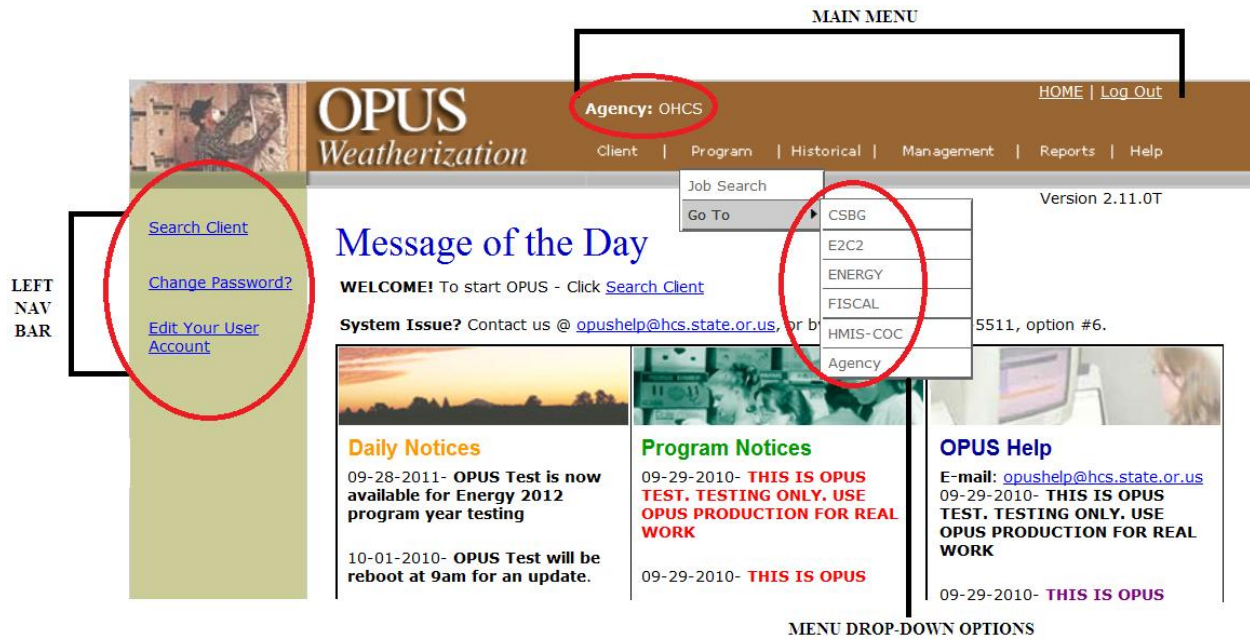


Figure 1-12: Main Menu and Left Nav Bar

A drop-down menu may include sub-menus when the mouse scrolls over a topic. For each menu item, you may see a black arrow pointing towards the right. When the mouse is scrolled over a menu, the arrow will display additional sub-menu items. In the example above, the ‘Program’ menu has a drop-down menu with a ”Go To” item menu, which has a sub-level menu listing other modules. The menu includes an “Agency” item which leads the user to the Agency-Module Select screen.

Left Navigation (Nav) Bar

The Left Nav Bar is bar area has text links (*reference figure 1-12*). Text links change on the ‘Left Nav Bar’, from screen to screen, depending on what screens have been accessed, or need to be completed through the client intake process.

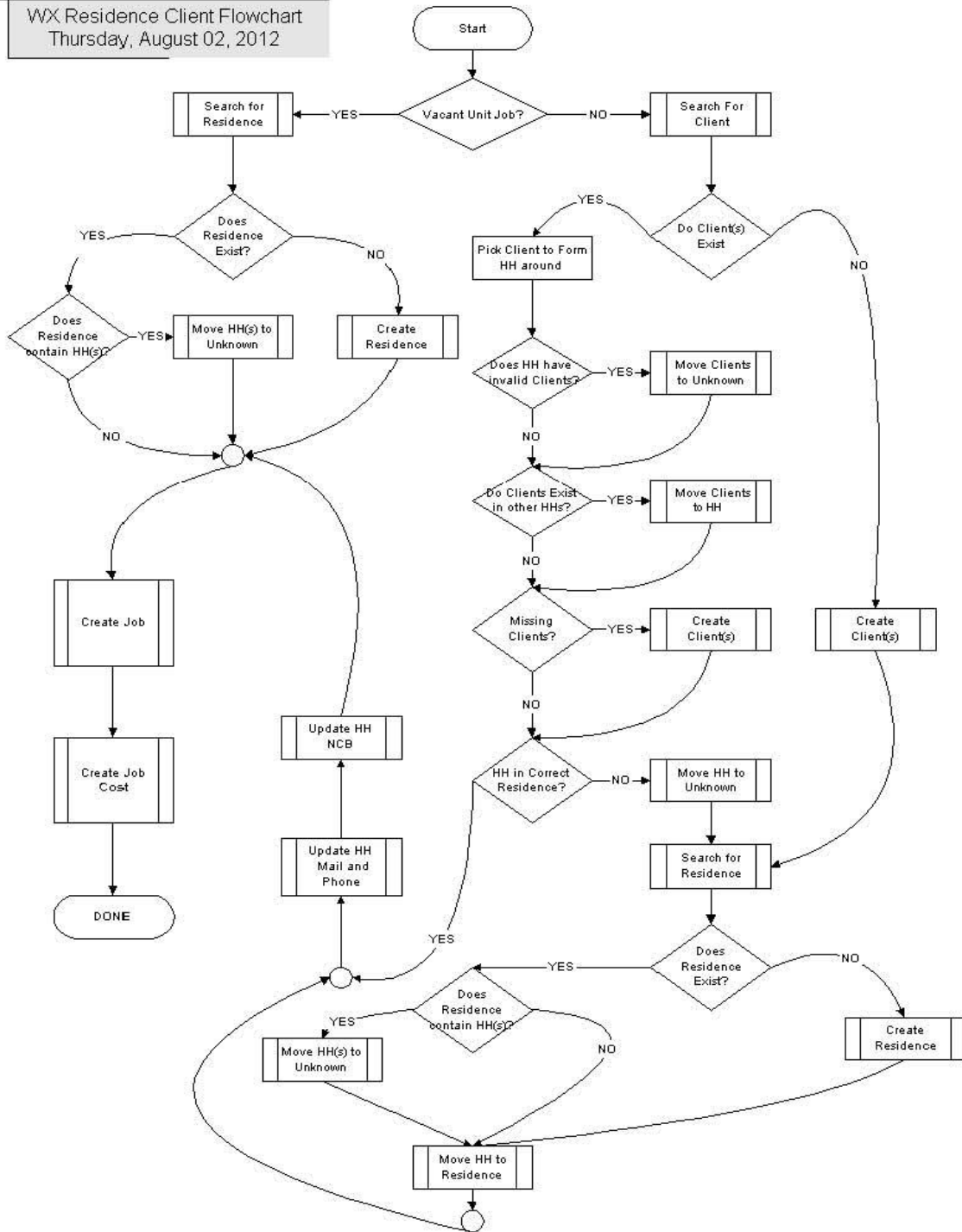


Figure 1-13: [Weatherization Residence Client Flowchart](#)