

## WIS Advanced Features Part I

In our next session I'd like to cover some advance features of the WIS application. We're going to cover action items and the tab organization, reviewing submitted forms, a search function, the icons that are on the different screens, we'll look at steps and remarks on processed documents, we'll look at how to archive, edit user profiles and modify passwords among other things.

I've logged into my account and the opening page will look similar to this, depending on the number of action items you have or things in process, archive and recent. What I'd like to do is look at some of the icons and the advanced features on this screen.

The first thing we'll look at is your profile information. Your profile information basically is generated the first time you set up your account in WIS and these things contain items such as your name, your e-mail address and certain parameters that are set up when you manage your account. There are a number of items in your profile that can be edited by you. If you come down and click on the edit user profile button; any item that shows up in this next screen with a little pencil mark can be edited by you as an individual. Anything that is not on this screen has to be edited by the WIS administrator. So for example if your telephone number changes you could come down here to the office phone number, click on the little pencil icon in the right hand column under edit, click on the pencil, modify your value, click on submit and basically your profile is changed. To return back to the previous screen you click on back.

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Now one thing that you need to be aware of is that WIS passwords will expire after 90 days. Not to worry though; when your password has expired you'll be able to log in to the application, you'll be prompted to change your password as it's been expired but you'll still be able to log in. Let me show you how to change your password in advance or even with the prompt will be the same thing that you'll see. You can go to your first opening page, go to my profile; at the very bottom of the form you'll see a button, edit user login. Click on that and then click on modify your password. The screen you see here is basically the same screen you'll also see when your password has expired. It'll allow you to type in your old password and your new password twice at the bottom, following the rules minimum of 12 characters, uppercase and lowercase letters, at least one number and one special character, cannot repeat the last 24 passwords used and it cannot contain all or any of your user login ID. Once you've typed that in successfully, you can click on the modify button and we'll skip that step right now and it should return you back. You can click on back and come back all the way out to here.

I also like to encourage my users to test their password once it's been modified. Go ahead and log out and log back in with your new password just to make sure that everything is correct and you can get logged back in. Your password will lock up your account if you try unsuccessfully to log in a number of times. You won't really know that your account has locked up; it just won't let you log in.

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That's a security feature as designed to prevent misuse of your account. If you feel like your account has locked up because of bad passwords you can call the WIS administrator and have your account unlocked and even have a new password sent to you. If you're not sure what your current password is and you can't get logged in, you can contact the WIS administrator and have your password reset.

Another item that you might want to use as you develop more processes is the search process. Search process icon will allow you to search in any of your forms for specific key words or numbers or combination of all of the above. If you're looking for a particular form that has a unique value; a well name, a well number, an API number etc. you can go ahead and type that string in here, click on the search button and it'll actually return the number of transactions that you have; the specific transactions that contain that unique field. For example if I know that I'm looking for a well number that was 77; I can type in the number 77, click on the search feature and it'll actually return the number of forms, the specific forms, that have 77 in the value anywhere on that form. Now you'll notice right away that if you have a fairly common search parameter; it'll be a little bit harder to find if you use that number on a repetitive basis. For example searching for the word federal would probably return quite a few documents if all of your numbers; if all of your well names are federal.

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In addition to the key phrase search you can also set your processes by looking at all processes or only specific processes; the specific status whether they're in draft, have been sent, have been finalized; can search by date, by identifier if you know what that number is or the process. Now the other key feature is when the BLM receives your document it will be assigned a 6 digit transaction item number. Those numbers are the items that the BLM will see. You could search in that doc- in the document for that. For example a number like 131236 would be the key transaction number; would be able to search in that features- search for those features. Again we'll use the back button and come back to here.

The other icon that you might use on somewhat of a regular basis is the help button that has been provided by Probarus the company who has built the background commercial off the shelf software. This is a search feature that runs in the background and it might be of assistance for you when you're using the software. Again this is a search feature that was built by the third-party contractor that developed this software.

Like to continue on and show you a few more items on this top level feature; the action items as we've looked at before would contain all the documents or the transactions that you have yet to submit to BLM. My processes would show all of the transactions whether they are sent to the BLM or in process or have been finalized. Archive is something that you might do as you build more and more forms. We don't allow you to delete any documents from this database but we

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do allow you to archive certain processes in to a different part of the screen. I like to think of this as a file drawer where you keep all your active projects in one file drawer and when those projects are no longer active you move them to the archive. You archive your documents by clicking on the check box next to the item number, come down and click on the red archive process button; that document will basically be moved from my processes into the file drawer for archived processes. If you'd like to move a document back, the reverse process is used. Click on the document number check box, click on restore and that document will be move back to my processes. You can use this feature to clean up your closed or completed projects by moving them from my processes to archive. As you build documents, this counter will grow. It will start from 1 of 1 and grow through the number of pages. You'll have up to 10 documents displayed on a given page and as you build more than 10 documents you'll actually increase your number of pages. You'll be able to click on this little pull down menu to go to a specific page or click on next page or previous page to move through your documents.