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FINAL DRAFT

POLICIES AND PROCEDURES MANUAL

For the Office of the Administrator and
Four Supporting Offices

AGENCY FOR INTERNATIONAL DEVELOPMENT
WASHINGTON, D.C.

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November 10, 1982

Mr. Linwood A. Rhodes
M/SER/DM/IM
Agency for International Development
Washington, DC 20523

Subject: Final Draft Policies and Procedures Manual
Contract No. AID/OTR-I-1860, Work Order
No. 12--ES/EXRL System Implementation Services

Dear Mr. Rhodes:

Booz, Allen & Hamilton is pleased to submit the final draft Policies and Procedures Manual for the office automation system in the Offices of the Administrator, Executive Secretary, External Relations, Legislative Affairs and Public Affairs. The Manual reflects the comments received from these offices on the draft version.

This Manual includes the following information:

- Chapter I, Introduction, provides the objectives of the system and the purpose of the Manual
- Chapter II, Equipment Description, includes an overview of the configuration, component location, features, and internal organization of the Wang equipment
- Chapter III, System Management Staff, presents the roles and responsibilities of the System Manager, Assistant System Manager, and Lead Operators
- Chapter IV, Policies and Procedures, presents the guidelines for staff use of the office automation equipment.

Several appendices are also provided, each having additional information for user and operator reference.

Mr. Linwood A. Rhodes
November 10, 1982
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We wish to express our appreciation for the cooperation and assistance of the offices' staff who contributed in the development of this Manual.

Very truly yours,



BOOZ•ALLEN & HAMILTON Inc.

Michael M. Lent
Managing Associate

Attachment

cc: F. Herder
V. Johnson

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I. INTRODUCTION

The office automation system was installed to increase the effectiveness of work processes, to enhance the quality of work products, and to reduce processing time in the following offices:

- . Office of the Administrator (A/AID, consisting of the Administrator, Deputy Administrator, and Counselor to the Administrator)
- . Office of the Executive Secretary (ES)
- . Office of External Relations (EXRL)
- . Office of Legislative Affairs (LEG)
- . Office of Public Affairs (OPA).

This group of offices is referred to as ES throughout this manual.

To help accomplish these objectives, the Office of Data Management (M/SER/DM) contracted with Booz, Allen & Hamilton Inc. to develop an office automation system design. The system design document, accepted by ES management in October 1982, included recommendations on:

- . Equipment and applications
- . System management roles and responsibilities
- . System usage policies and procedures.

The purposes of this manual are to describe the installed office automation system and to establish an initial set of policies and procedures for individuals who originate documents (i.e., users) for system processing as well as individuals who access the system daily or weekly for document production (i.e., operators). These initial policies and procedures were developed by ES staff with Booz, Allen collaboration and were approved by ES senior management.

The contents of this manual include:

- . Chapter II, Equipment Description, presents an overview of the configuration, component location, features, and internal organization of the Wang equipment.

- Chapter III, System Management Staff, presents the roles and responsibilities of the System Manager, Assistant System Manager, and Lead Operators.
- Chapter IV, Policies and Procedures, presents guidelines for all staff use of the office automation equipment.
- Appendix A, Office-Specific Procedures, provides additional guidelines for staff use of the office automation equipment in the individual offices.
- Appendix B, Glossary of Terms, lists and defines frequently used office automation terms.
- Appendix C, Document Revision Guidelines, presents general instructions and lists the most frequently used symbols for marking revisions to a textual document.
- Appendix D, System Management Staff, lists the key staff with daily office automation responsibilities.
- Appendix E, Library Assignments, lists the Wang libraries assigned to each ES office.
- Appendix F, Glossaries, lists the glossaries developed and maintained by ES staff and includes instructions for using the glossaries.
- Appendix G, List Processing File Creation Guidelines, is a guide to creating a list processing file.
- Appendix H, Care of Diskettes, is a guide specifying diskette handling instructions.

The manual is intended to provide ES staff with the basic information required to administer and use the installed office automation system effectively.

II. EQUIPMENT DESCRIPTION

An understanding of the installed office automation equipment and its structure provides the basis for users and operators to understand and identify its capabilities and uses for daily work activities. This chapter describes the ES office automation equipment including the configuration, location, features, and internal organization of the Wang 5 and the OIS 140.

1. EQUIPMENT CONFIGURATION

The ES office automation equipment configuration was designed specifically for the ES operating environment, existing document procedures, and volume and type of documents processed. The configuration (Exhibit II-1) is composed of a shared-logic system plus two standalone Wang 5s. A shared-logic system is one having a central processing unit (CPU) interconnected via cables to work stations and printers at different locations. This type of system links all attached work stations and printers into an internal communications network. The standalone Wang 5s are independent units. Information is shared between Wang 5s and between the shared-logic system and Wang 5s by use of a removable storage medium, a diskette. The combination of the shared-logic system, a Wang OIS 140, and the standalone Wang 5s provides ES with the capability to process a large volume and variety of documents.

The hardware configuration of the ES Wang OIS 140 (Model III) includes the following equipment:

- . A CPU with an 80.4 million character disk (approximately 36,000 pages) for on-line storage of software and information (documents and files). It also has a diskette drive for off-line storage and retrieval of information via diskettes.
- . Seven work stations, each having an 80-character wide by 24-line CRT (cathode ray tube), a TV-like display screen, and a standard typewriter keyboard with special function keys.
- . Six archival work stations, each having an 80-character wide by 24 line CRT, a standard typewriter keyboard with special function keys and a

EXHIBIT II-1

Equipment Configuration by Organizational Unit

OFFICE	ARCHIVING WORK STATION	WORK STATION	DAISY PRINTER	TWIN SHEET FEEDER	STAND- ALONE WANG 5
A/AID	1	1	1	1	-
ES	2	2	2	2	-
EXRL	1		1	1	1
LEG	1	1	1	1	-
OPA	1	2	2	2	1
CPU ROOM	-	1	1	-	-
	<hr/>	<hr/>	<hr/>	<hr/>	<hr/>
Total	6	7	8	7	2

single diskette drive for off-line storage and retrieval of information through the use of diskettes.

- . Eight daisy printers which produce documents using interchangeable print wheels and bi-directional printing.

The daisy printers can accept paper by three methods:

- . The manual insertion of individual sheets of paper
- . The automatic feeding of continuous form paper
- . The automatic insertion of single sheets of paper through the attachment of a Wang Twin Sheet Feeder.

Each of the two standalone Wang 5s has a CRT, a dual diskette drive for on-line and off-line storage and retrieval of information, and one daisy printer.

This configuration provides access to the equipment by all ES offices and links the offices in a network by the shared applications. The equipment is shared equally within each office. No individual has exclusive use of any particular piece of equipment. In addition, during an emergency or peak requirement, the equipment is available to other offices within the ES network.

2. EQUIPMENT LOCATION

Exhibit II-2, following this page, displays the specific location of each piece of installed equipment. The system's configuration is expandable, and, as the need arises, more equipment may be added to meet office needs.

3. EQUIPMENT FEATURES

The Wang OIS 140 and Wang 5s form a powerful word processing system that provide the users and operators with an efficient, time-saving method of producing documents and maintaining records of information. Specific software features of particular interest to ES personnel are:

(1) Powerful Editing

The editing feature allows the insertion or deletion of characters, words, lines, paragraphs, or entire sections of text quickly and easily. The ability to search for repeated occurrences of a character sequence and automatically replace those characters is

EXHIBIT II-2

Location of Equipment by Organizational Unit

<u>LOCATION</u>	<u>ROOM</u>	<u>EQUIPMENT</u>
A/AID	5942	1 Work Station
	5894	1 Archiving Work Station 1 Printer*
ES	5945	1 Work Station 1 Archiving Work Station 1 Printer*
	5663	1 Work Station 1 Archiving Work Station 1 Printer*
EXRL	5756	1 Archiving Work Station 1 Printer* Wang 5
LEG	2890	1 Work Station
	2894	1 Archiving Work Station 1 Printer*
OPA	4890B	1 Work Station 1 Printer*
	4890	1 Archiving Work Station
	4883	1 Work Station 1 Printer*
	4893	Wang 5
CPU Room	5750	CPU 1 Work Station 1 Printer

*Twin Sheet Feeder Attachment

provided through global search and replace. Time-consuming retyping because of major or minor changes can be reduced. Appendix C to this manual contains guidelines for revising a document. The use of these guidelines helps to clarify the originator's intent for the operator.

(2) Glossary

Glossary allows commonly used words, phrases, standard paragraphs, or instructions to be stored on the system disk or diskette for later recall and insertion into a document with only two keystrokes. The use of glossaries can reduce document preparation time and ensure conformity to established document specifications.

(3) System Security (limited access)

System Security is the name of the Wang feature designed to help protect information requiring limited access. Password-protection can be given to a document, a group of documents, or a file to help control unauthorized access.

(4) Mathematic Support

Mathematic Support enables operators to perform common mathematical functions (addition, subtraction, multiplication, or division) on numbers that are part of any word processing document without the use of an external calculator. Once the functions are performed, the solution is inserted into the document, if requested by the operator. By eliminating time-consuming, manual rechecking of calculations, operators can become more efficient and productive.

(5) Document Merge

This feature allows an operator to merge a primary document of standard information and a secondary document of variable information into a third document which can be viewed on the screen for possible revisions or stored as a separate document. For example, a form letter can be merged with a specific name, address, and other variable information to produce a tailored output document.

(6) Decision Processing

Decision Processing is an extension of Wang glossary which facilitates text manipulation by allowing operators to test for user-specified conditions and

then instruct the system to proceed based upon the results of those tests. For example, a glossary may contain instructions which ask the operator if the end of the page has been reached. Depending on the operator's response, the system may present the next pre-constructed page for keying or allow the operator to continue typing on the same page. This feature eliminates repetitive text-editing steps and enables operators to preconstruct forms and other business documents that can be used in other instances, regardless of variables entered by the operator. It is available only on the OIS 140.

(7) Automatic Paragraph Numbering/Table of Contents Generator

This feature automatically numbers paragraphs and chapters in a document and creates the table of contents for a word processing document. It is available only on the OIS 140.

(8) Calculator

Calculator allows the user to perform mathematical calculations. The numbers used to calculate are not part of a word processing document. They are typed into the advanced function menu only to be used in performing the desired calculations. The results can be saved by creating a word processing document to contain them. It is available only on the OIS 140.

(9) Mailbox

Mailbox, available on the OIS 140 only, allows messages to be transmitted between work stations.

(10) List Processing

List Processing allows operators to create and maintain records of user-defined information. These records, together, form a file and can be retrieved and printed in user-specified criteria. This feature is available on the OIS 140 only.

(11) Index Generator

Index Generator, available on the OIS 140 only, creates the index for a document from a list of user specified keywords.

(12) Sort

Sort provides the ability to sequence data according to a user-specified key field of a file. Sequencing can be done either alphabetically or numerically, in ascending or descending order.

(13) Document Sort

Document Sort provides users with the capability to arrange lists of information into ascending and descending order. Document Sort differs from the Sort feature in two ways. First, multiple pages of a single document can be sorted and second, several documents (up to 120) can be combined and sorted to produce one final document. This feature is only available on the OIS 140.

Applying these features in various combinations will enhance ES document preparation and information handling processes.

4. INTERNAL ORGANIZATION OF THE WANG 5 AND OIS 140

A combination of the hardware and software support the internal organization of both the Wang 5 and the OIS 140. The hardware and software permit operators to designate and organize information for subsequent retrieval and usage. The hardware and software tools include:

- . System Disk
- . Archive Diskettes
- . Libraries and Document ID Numbers
- . File Names.

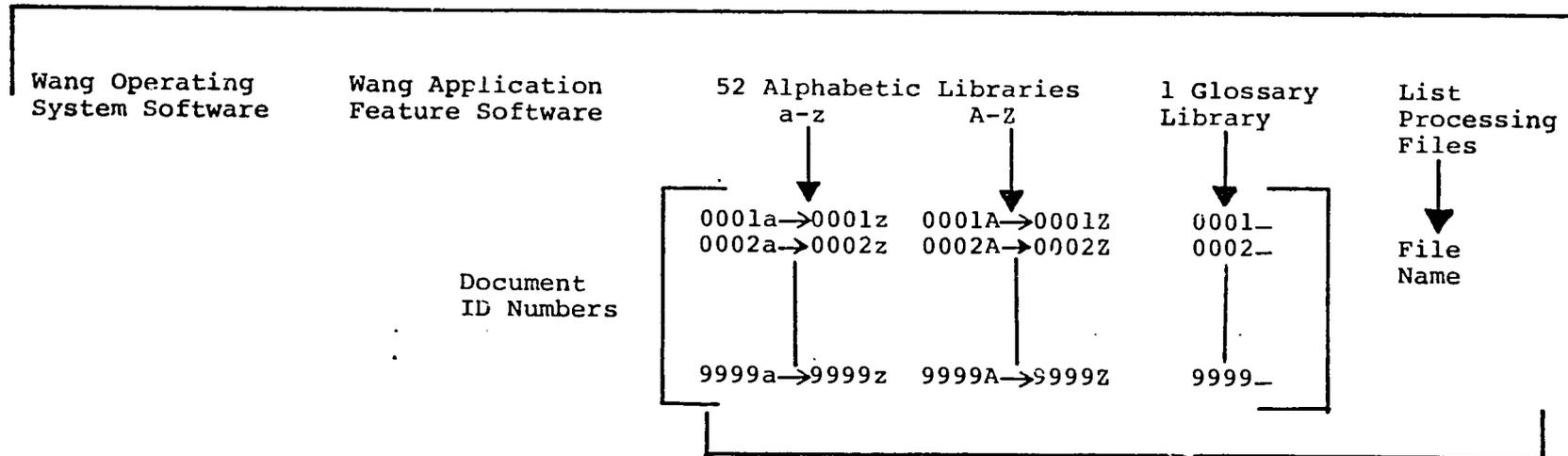
A description of each tool and its major uses are presented in the following sections. Exhibit II-3 presents a pictorial representation of the internal organization of the OIS 140.

(1) System Disk

The system disk on the OIS 140 is the on-line storage medium available for interactive processing by the CPU. The system disk can contain up to 80.4 million characters (or approximately 36,000 pages) of user-created information and Wang software. Under normal conditions, when the CPU is "powered up", all documents and files created and/or revised by users at CPU-connected work stations are automatically written and stored on the disk and accessible to all users

EXHIBIT II-3
 Internal Organization Of The Wang OIS 140

WANG OIS 140 SYSTEM DISK



Information Filed and/or Copied
 Onto Archive Diskettes

unless password-protected. Therefore, all information created and stored on the disk is centrally located in the Wang OIS 140 until deleted or filed onto archive diskettes.

On the Wang 5 a nonremovable system diskette performs the same function as the system disk contained within the OIS 140. This system diskette contains up to approximately 80 pages of documents and the software. During processing of information, the system diskette stores all documents created and/or revised by operators at the work station.

(2) Archive Diskettes

An archive diskette is a magnetic storage medium resembling an eight-inch 45 rpm record used for off-line storage of information. One diskette can contain up to approximately 120 doubled-spaced pages of information. Off-line storage of information serves two useful purposes:

- . To contain back-up copies of information to prevent total information loss from equipment malfunction
- . To provide additional storage space off the system disk (or diskette) for information not frequently used.

Back-up diskettes which contain duplicate and identical information to that residing on the system disk preserve information when equipment malfunction/failure or disk damage occur. When a document or file cannot be recovered on the system disk after an unforeseen system malfunction, the back-up, or "copied," information on the diskette can be rewritten onto the system disk for further usage via the Wang archival feature.

Diskettes serve also to free occupied system disk space for use by other documents and files. Information not frequently used on the system disk can be removed from the system disk and transferred, or "filed," onto diskettes. By freeing system disk space, the overall system response time at each work station and printer can decrease and efficient utilization of disk space can be maintained. Once the document or file is filed onto diskettes, it remains in electronic form for later retrieval and use via the Wang archival feature. (Refer to Chapter IV, Policies and Procedures, for document maintenance guidelines and Appendix H for diskette care instructions.)

The use of archive diskettes is the same for both the Wang 5s and the OIS 140. However, due to the limited on-line storage space of the Wang 5, information is usually filed off the system diskette each time processing is completed.

(3) Libraries and Document ID Numbers

Libraries and document ID numbers are two Wang tools which aid operators to organize and catalog documents created on the Wang OIS system disk. There are 53 libraries, each assigned an identifying alphabet, a-z and A-Z, and the glossary library, assigned a space instead of a letter. When a document is being created, the operator designates which library the document is to be assigned. The Wang then generates a unique four-digit identification number followed by the operator-selected library letter forming the document ID number (e.g., 0010A for a document created in library A or 0010_ for a glossary document). Each document ID number is unique and is the operator's access number to storing and retrieving the document from the system disk and archive diskette.

On the Wang 5s, only two libraries are available, one for the storage of text and one for the storage of glossaries. As on the OIS 140, the system generates a unique document identification number using the same format described above.

(4) File Names

File names are used to identify a file created in Wang List Processing, an OIS feature. A file name contains eight characters of which any or each character can be alphabetic, numeric, or a punctuation key. Wang's operations keys, such as copy, delete, move, cannot be used as part of the file name. When creating a file, each file name on the Wang OIS should be unique. It is advisable to use the file name in describing the file's contents, e.g., MISSION represents a file of all inventory at USAID Missions.

III. SYSTEM MANAGEMENT STAFF

A clear, effective management structure is a necessary condition for system success. This is especially true when installed equipment is distributed throughout different offices and shared by the staff members. Senior management has assigned overall responsibility for administering the office automation system to the Office of the Executive Secretary (ES). The establishment of the central management staff in ES greatly enhances the ability to maximize the use and benefits of the system. Three staff roles have been developed and assigned to individuals who will manage and ensure proper utilization of the Wang 5s and OIS 140. These are the System Manager (SM), the Assistant System Manager (ASM), and Lead Operators (LO). This chapter presents an overview of the roles and the key responsibilities of the system management staff.

The System Manager and Assistant System Manager have overall responsibility for formulating and implementing policies throughout the system, for coordinating training activities and system usage, and for serving as a central contact point for advice, technical and maintenance support of the system. Lead Operators assigned to each office assist in coordinating work at their individual offices and in training staff in the use and capabilities of the equipment.

1. SYSTEM MANAGER

The System Manager has primary responsibility for system-wide management and decision-making. The following lists the main duties performed by the SM with the delegation of the day-to-day activities to the Assistant System Manager:

- . Advise senior management of the status of office automation operations and the need for any corrective action.
- . Identify and develop operational procedures under the technical guidance of M/SER/DM
- . Revise (as necessary) the operational procedures
- . Develop training strategy
- . Approve and assess training activities

- . Maintain overview knowledge of system operations and document applications
- . Serve as the in-house advisor on use of the system
- . Oversee the distribution of technical and procedural information within ES and to M/SER/DM
- . Resolve work station availability conflicts between offices that cannot be resolved by the offices
- . Ensure the preparation of and review the system utilization statistics as required by M/SER/DM (e.g., operation logs) that identify amount of time equipment is in use and the amount of output produced
- . Participate with M/SER/DM in operational reviews and post-implementation evaluations, as appropriate
- . Participate in a group composed of office automation users, sponsored by M/SER/DM, to identify operational problems and solutions
- . Receive M/SER/DM bulletins on office automation topics
- . Maintain inventory of installed equipment
- . Serve as advisor on equipment configuration modifications
- . Consider new features and equipment as they become available
- . Help justify equipment changes
- . Define and revise (as necessary) the system back-up policy
- . Determine and revise assignment of libraries
- . Establish and implement the password system.

2. ASSISTANT SYSTEM MANAGER

The Assistant System Manager supports the SM in managing the system on a day-to-day basis and is the primary system resource to Lead Operators. As such, the position serves as back-up to the SM and is responsible for the duties presented above, as well as for the specific duties listed below:

- . Maintain knowledge of equipment operations and document applications
- . Serve as the in-house technical expert on the equipment operations of the system
- . Provide guidance to equipment users and operators on technical and procedural issues.
- . Distribute technical and procedural information within ES
- . Coordinate, schedule, and monitor training and provide initial staff orientation
- . Maintain the system utilization statistics
- . Create and update the library assignments on the volumes of the system disk
- . Monitor the space utilization of the system disk
- . Notify operators to remove documents from the system disk if space utilization is too high
- . Review and approve glossaries for consistency with AID regulations
- . Send copies of newly developed glossaries to ES operators and M/SER/DM
- . Administer and monitor the password system
- . Bring Wang OIS up and take it down as needed
- . Serve as an advisor to operators when equipment malfunctions
- . Place requests for service or technical support calls as necessary
- . Maintain records of equipment problems, amount of downtime, responsiveness of service calls, and Wang service receipts
- . Monitor system downtime and coordinate the awarding of downtime credits with M/SER/DM
- . Maintain adequate levels of expendable supplies
- . Order supplies as necessary
- . Determine work stations not "in use" on request.

3. LEAD OPERATORS

Lead Operators are assigned to each organizational unit (i.e., offices). These individuals are responsible for directing office-wide utilization and administration of the equipment by both users and operators. They work closely with the System and Assistant System Managers. The principal duties of the Lead Operators are to:

- . Serve as the local expert on office-specific system applications and procedures
- . Maintain knowledge of document applications and equipment operations
- . Provide a central point of coordination within each office
- . Establish work priorities within each office
- . Orient office staff to appropriate use of the equipment capabilities
- . Recommend revisions to existing operational procedures to the System Manager
- . Determine equipment malfunctions
- . Contact Assistant System Manager to secure service or technical support
- . Oversee proper archiving of information.
- . Check supply levels at work station area(s)
- . Prepare order of supplies needed for the Assistant System Manager
- . Test new equipment
- . Monitor the recording of system utilization statistics for the work station
- . Submit utilization statistics required by M/SER/DM to the System Manager.

Within each office, designated operators have been selected. Although not part of the formal system management structure, these individuals, whose current job responsibilities include typing and related functions, support the office Lead Operator by:

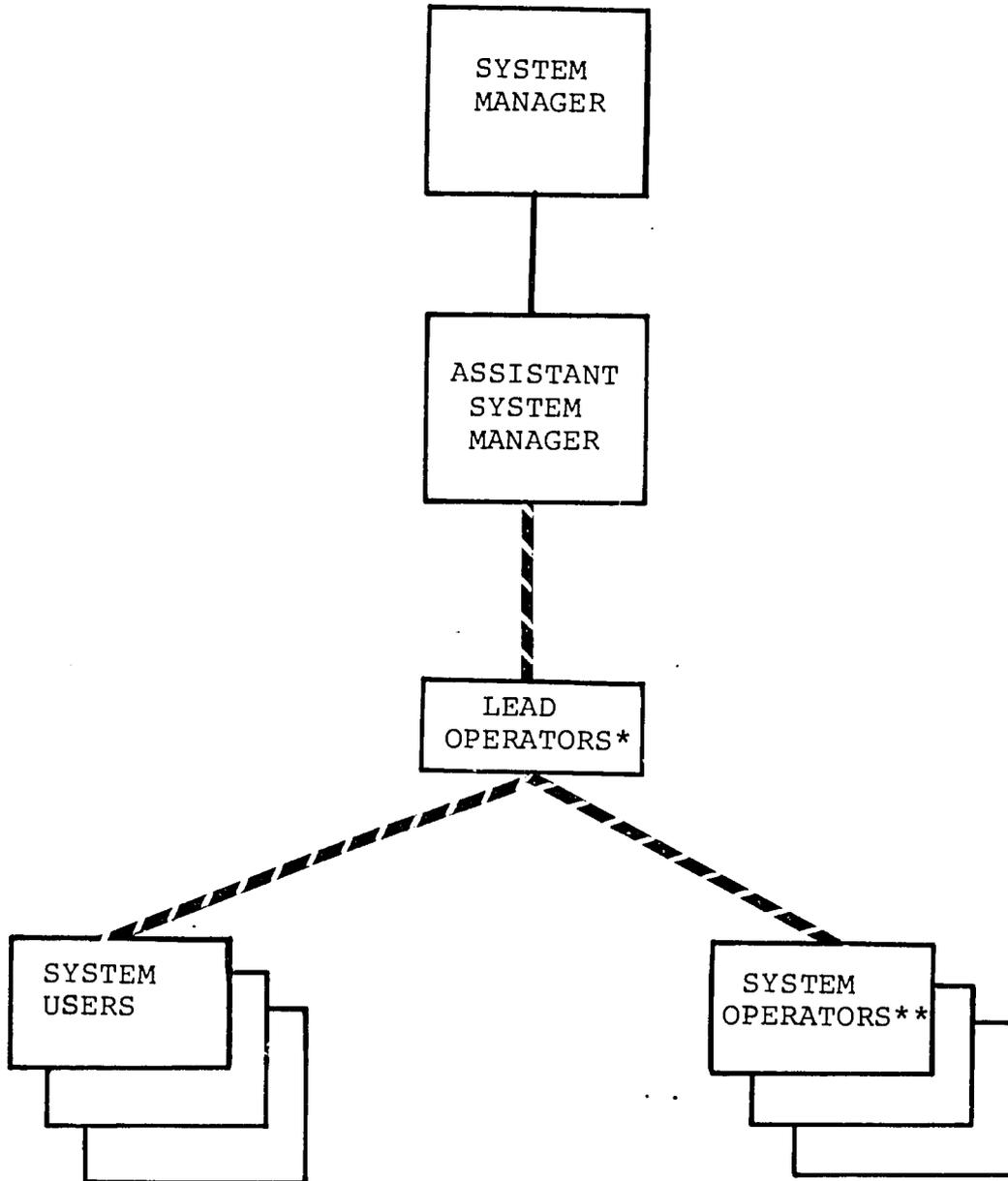
- . Assuming responsibility for maintaining proper operations at a specific work station
- . Notifying the Lead Operator of system needs (e.g., reordering of supplies).

* * * * *

Exhibit III-1, on the the following page, presents the system management structure. A complete list of all system management staff, including locations and telephone numbers, is presented in Appendix D. All staff assigned to participate in the administration of the office automation system continue to carry out all their other responsibilities, unless notified by their supervisor. System management staff still continue to report to their supervisor in all matters except those relating to the office automation system.

Although M/SER/DM does not have a formal role in managing the office automation system, it is still responsible for coordinating the Agency's use of the technology, consequently, M/SER/DM will be periodically issuing bulletins to the System Manager on the use and management of the system. M/SER/DM is also available for information and advice as needed by management and the System Manager.

EXHIBIT III-1
System Management Structure



- * Each office has a Lead Operator to guide office-wide use of shared equipment and to coordinate system usage by both users and operators.
- ** Each office has designated operators who may have primary responsibility for specific pieces of equipment whose use is coordinated by the Lead Operator.

IV. POLICIES AND PROCEDURES

This chapter presents the initial general policies and related procedures for using the ES office automation equipment. The intent of these policies is to provide the staff a foundation to begin effective utilization of the system. The accompanying procedures provide direction to system users and operators for policy implementation. The following subjects are presented in this chapter.

- . Policy Formulation
- . Training
- . Hours of Operation*
- . Use of Work Stations*
- . Assignment of Libraries
- . Assignment of Passwords
- . Production of LOU/Classified Material
- . Technical/Equipment Maintenance Support
- . Supply Acquisition/Maintenance
- . Utilization Statistics*
- . Document Creation
- . Use of Document ID Numbers*
- . Document Back-Up
- . Document Retention/Deletion
- . Maintenance of Glossaries
- . File Creation
- . File Retention/Deletion
- . File Back-up.

Appendix A, Office-Specific Procedures, contains additional guidelines for staff use of the equipment in the individual offices. The subjects indicated with an asterisk (*) above are discussed in this appendix.

These policies and procedures provide the staff with the framework to begin effective use of the installed Wang 5s and OIS 140. Throughout this chapter, the responsibilities of the System Manager and the Assistant System Manager are discussed as they relate to specific tasks. Whenever one of these managers is absent, the other manager is responsible for providing the required service or advice.

1. POLICY FORMULATION

(1) Policy

Policy decisions affecting staff and budget issues are made by the System Manager in consultation with the senior management (i.e., the directors of the individual offices comprising the ES system). Examples of these issues are system management roles and staffing, training strategy, and major equipment modifications. The System Manager is responsible for the development and implementation of the operational policy decisions. These decisions include standards for documentation of applications, enforcement measures to maintain system integrity and effectiveness, and local office requirements to monitor and evaluate system performance.

(2) Procedures

All recommendations for new or revised policies should be directed to the System Manager. The System Manager will develop the appropriate policies and, if necessary, coordinate the policy development and changes with senior management. Once approved the policies and any associated procedures will be distributed to the staff by the Assistant System Manager.

2. TRAINING

(1) Policy

ES has developed a training strategy with the objective of providing users and operators the required information and skills to effectively use the word processing system. Training is available to all staff members. The following four levels of training are addressed in this strategy:

- Orientation - This consists of group seminars or individual sessions with all staff members. The orientation provides an overview of the equipment capabilities, the system management roles, and the operating policies and procedures.
- Access Training - This training consists of teaching staff members the fundamental functions of the equipment. This includes how to create, locate, and print a document, as well as to perform simple editing functions.

- . Basic Operator Training - This training covers the same information as the Wang basic word processing course. The features and functions included in the Access Training, above, and other topics are presented, e.g., document format, filing and copying information to diskette, retrieving data from diskette, advanced editing techniques, and the attachment of glossaries.
- . Advanced Training - This addresses the more advanced functions and features of the system. Examples of the materials available are the creation of glossaries and list processing files.

The two phases of the training strategy are:

- . Phase I - Transition Training
- . Phase II - On-going Training.

During Phase I, Transition Training, the objectives are to provide the entire staff with system overview information, to build expertise in basic functions and selected advanced functions for the system management staff, and to train operators on the applications developed by Booz, Allen. To address the first objective, orientation sessions will be held to acquaint the staff with the system components. All staff members should attend these sessions. To build expertise in basic and advanced functions for the system management staff, courses will be conducted by Wang and AID's Office of Training (M/PM/TD/OT). Once the system management staff has received instruction, the training efforts will be expanded to include other operators and users. The level and detail of training will be determined by the trainee and the System Manager. To accomplish the third objective of Transition Training, Booz, Allen will train selected operators on the specific applications they develop for the ES system. The results of the Transition Training will be a staff equipped with the information to facilitate effective use of the system and a core staff of operators with expertise in Wang equipment functions.

The objective of the On-going Training (Phase II) is to provide all levels of training to new users and operators and to extend the knowledge of those already trained. New personnel will need to be introduced to the system orientation information, probably through individual sessions. Access, basic, and advanced

training will be provided to other staff members, as needed. Training arrangements will be coordinated by the Assistant System Manager with the approval of the System Manager. The Lead Operators, trained as part of the core staff during the Transition Training phase, will assist the Assistant System Manager as in-house trainers, when required. As a result, staff training needs will be satisfied on a continuous basis.

(2) Procedures

When a need is identified, the potential training recipient and his/her supervisor should discuss the scope and timing of the desired training with the office Lead Operator. In order to receive training, staff members must contact the System Manager or the Assistant System Manager. They can assist any potential trainee in determining which level of training is required or what specific features are needed if advanced training is desired. Once this determination is made and approved by the System Manager, the Assistant System Manager will make the necessary arrangements for the training to occur.

3. HOURS OF OPERATION*

(1) Policy

Due to the placement of the equipment in secured rooms, the system is available on a continuous basis, twenty-four hours a day, seven days a week. Normally, the CPU which controls the work stations and printers attached to the OIS remains "up" (turned on) at all times. However, the work stations and printers are to be turned off at the close of each business day. The Wang 5s are also to be turned off at the close of each business day.

An exception to the continuous availability would be during maintenance work by Wang. At these times, operations may be halted, depending on which piece of equipment is being serviced. If, for example, a scheduled maintenance visit by the Wang service representative occurs, the OIS 140 may be unavailable for two to three hours. However, if maintenance on an individual component (e.g., a printer) is required, only that component is unavailable.

(2) Procedures

The Lead Operators are responsible for turning the equipment on and off each day. At the close of each business day, the Assistant System Manager checks, via the control functions at a work station, to see that all OIS 140 work stations and printers are turned off or in use. If the equipment is on but not in use, the Lead Operators are notified so that the equipment can be turned off.

Lead Operators assigned to the Wang 5s must be particularly careful to verify that the equipment is turned off at the end of the day. Since they are not connected to the OIS CPU, there is no other way to determine if they are left on.

4. USE OF WORK STATIONS*

(1) Policy

Work stations are to be used for official Agency business only. No other work is authorized. Although work stations are located in designated areas they are to be shared office-wide. No individual or group has exclusive use of a particular piece of equipment. When work priority conflicts occur, the shared use of each office's equipment is coordinated by the Lead Operator. During an emergency or peak requirement, work stations in other offices that are part of the ES system may be used. This usage is coordinated through the Lead Operators with the approval of the System Manager. The work station in the CPU room is available when not in use for training.

(2) Procedures

When a work priority conflict occurs, the office Lead Operator should be contacted. If unable to resolve the conflict, the office Lead Operator should contact other Lead Operators to determine the availability of another work station and the System Manager for usage approval. Appendix D includes a list of the Lead Operators and their telephone extensions. When no other work station is available, the System Manager should be asked to resolve the conflict.

5. ASSIGNMENT OF LIBRARIES

(1) Policy

Specific libraries have been assigned to each office and, in some cases, to divisions within an

office. The glossary library is available for system-wide use. Appendix E presents a list of the offices and their assigned libraries. The remaining libraries are currently unassigned.

(2) Procedures

Requests for additional libraries are made to the System Manager. However, since the maximum document ID number for each library is 9999, there should be very few of these requests. If a new library assignment is approved by the System Manager, the Assistant System Manager will create the library and notify the affected Lead Operator.

6. ASSIGNMENT OF PASSWORDS

(1) Policy

Passwords are attached to documents and files to prevent unauthorized access by other system operators. These passwords must be assigned by the Assistant System Manager to operators. Document passwords are then attached to documents by operators. File passwords are attached by the Assistant System Manager.

(2) Procedures

Each operator desiring a password should request one from the Assistant System Manager. The Assistant System Manager maintains a secured log of the assigned passwords and, if applicable, attaches the password to a file. The Assistant System Manager also provides the Lead Operators the password assignments for their specific office.

7. PRODUCTION OF LOU/CLASSIFIED MATERIAL

(1) Policy

Following the Uniform Security Regulations (5 FAM 900) established by the State Department's Security Office, and IG/SEC Notice, "Processing Limited Official Use Information (March 26, 1982), sensitive information such as personnel data and LOU documents can be placed on the Wang equipment but must be protected with a password and filed to an archive diskette, not stored on the system disk (OIS 140) or system diskette (Wang 5).

Classified material (Confidential, Secret, Top Secret) shall not be prepared, processed, or stored on the Wang 5s or OIS at any time.

(2) Procedures

To process sensitive or LOU material on the installed equipment, operators must password protect the document or file. Once processing is complete, the information must be filed to a diskette by using an archiving work station. Any diskette containing LOU material must be secured at the end of each working day in a locked cabinet. (Refer to Appendix H for general diskette care instructions.)

8. TECHNICAL/EQUIPMENT MAINTENANCE SUPPORT

(1) Policy

The Lead Operators assist operators with problems of a technical or possible maintenance nature. The Assistant System Manager should be consulted if the Lead Operator cannot resolve the problem. Wang service or customer support is then requested by the Assistant System Manager if necessary to resolve the problem.

Arrangements have been made with Wang to receive credits for prolonged downtime due to delayed response by a service representative. The Assistant System Manager is notified of these delays and is responsible for documenting incidents of delay to secure these credits. For details on these credit arrangements, the Assistant System Manager should be consulted.

(2) Procedures

The following procedures should be used if a technical question or problem arises:

- . Operators request assistance from the Lead Operator.
- . If the Lead Operator is unable to answer the question or resolve the problem, the Assistant System Manager is consulted.
- . Operators having urgent technical questions can call Wang's "hot line" number for assistance. This service is called "Action Center," and the number is (703) 276-0807. Wang personnel answering the call will either respond immediately or call back within four hours with a solution.

- The Assistant System Manager calls the Wang customer support representative if necessary to resolve the question or problem. This manager coordination is to ensure that all system operators requiring assistance can be seen when the Wang representative arrives.
- The record of call slips left by the Wang customer support representative is to be forwarded to the Assistant System Manager for monitoring and information purposes.

The procedures to be used if a mechanical problem arises are the same as those discussed above for technical questions except the Wang service representative is called instead of the customer support representative.

The Assistant System Manager arranges for the awarding of credits if there is a prolonged downtime due to delayed response of service to a call.

9. SUPPLY ACQUISITION/MAINTENANCE

(1) Policy

Quantities of expendable equipment-related supplies are ordered and received from the vendor by the Assistant System Manager. Expendable supplies are continuous feed paper, ribbons, print wheels, and diskettes. Lead Operators are responsible for storing and maintaining a fifteen-day supply level for their assigned work stations.

The Agency has arranged with Wang for credits to be awarded for malfunction of ribbons and print wheels and return of used ribbon cartridges. The Assistant System Manager is responsible for contacting the vendor to receive these credits. For details on these credit arrangements, the Assistant System Manager should be consulted.

(2) Procedures

The following procedures are used to obtain supplies:

- Operators who need ribbons or other supplies should notify the appropriate Lead Operator.

- . Lead Operators are responsible for preparing orders, submitting the orders to the Assistant System Manager, and maintaining supplies for their offices.
- . The ASM furnishes Lead Operators with supply replenishment and orders new supplies from vendors as necessary.
- . Special order requests are directed to the System Manager for review and approval prior to ordering.

Lead Operators must return any ribbons and print wheels as well as used ribbon cartridges to the Assistant System Manager. The ASM arranges with Wang and M/SER/DM for the award of credits.

10. UTILIZATION STATISTICS*

(1) Policy

All operators are responsible for completing the logs at the work stations each time the equipment is used. The Lead Operators collect and total the columns of the logs each week. The totals are submitted to the Assistant System Manager. The information from the logs is accumulated for purposes of evaluating system utilization and aiding in the identification of possible system modifications.

(2) Procedures

The log entries are entered each time the equipment is used. Exhibit IV-1, following this page, is an example of the log. The objective of the log is to determine the number of hours the work station is used and the number of original and revised pages or records are produced.

The Lead Operator totals the statistics for each week and submits the totals to the Assistant System Manager once a month. In turn, the System Manager reviews the monthly information and submits a summary report of the utilization statistics to M/SER/DM when requested.

11. DOCUMENT CREATION

(1) Policy

Each operator is to create documents in the specifically assigned library or the system-wide glossary

library. If an operator is creating a document for another unit, the operator must use a library assigned to that unit.

(2) Procedures

The document summary menu must be completed as follows:

- Document Name - use a descriptive title (up to twenty-five characters)
- Operator - enter the first initial, a space, and the last name in all capital letters of the person keying the document (up to twenty characters)
- Author - type the first initial, a space, and the last name in all capital letters of the originator of the document (up to twenty characters)
- Comments - key-in the date the document can be deleted (if known) or other useful comments (up to twenty characters).

Exhibit IV-2, following this page, is an example of a completed document summary menu. Proper keying of these entries assists in locating documents and performing library maintenance tasks.

Documents created on a Wang 5 must be filed to diskette immediately after processing is complete. This is due to the small amount of on-line storage available. An index of a diskette should be run each time a new document is filed.

12. USE OF DOCUMENT ID NUMBERS

(1) Policy

Documents created on the Wang OIS 140 or Wang 5 are automatically assigned an identification number, or ID. This number is considered the control number for a document and must be used to access a particular document.

(2) Procedures

Since document ID numbers are essential, both the operator and the document originator should keep track of these numbers. The originator needs the number in

EXHIBIT IV-2
Document Summary Menu

DOCUMENT SUMMARY

Document Id: 6062A
Document Name: Memo re: new equipment
Operator: J SMITH
Author: G WASHINGTON
Comments: 6/12/82 Delete

STATISTICS

OPERATION	DATE	TIME	WORKTIME	KEYSTROKES
Created	05/13/82	15:03	:00	2
Last Revised	/ /	:	:	
Last Printed	05/13/82	15:07		
Last Archived	/ /	:	onto Diskette	
Total Pages:	1	Total Worktime:	:00	
Total Lines:	4	Total Keystrokes:	2	

Pages to be printed 1

case it becomes necessary to have another operator make revisions and the original operator is unavailable.

There are many ways to keep track of the document ID number. On drafts, it could be entered as part of the page number so that it prints on each page of the document (i.e., 0010A-1). Or, it can be simply written in a corner of the first page of the document. Other suggestions, which work for both draft and final documents, are to write the ID number on the document with a non-photo blue pencil or on the back of the first page or to use a "Document Identification" form which remains with the document to record the ID number. Whatever means is used, it is important to recognize that knowing a document ID number saves time in locating a document.

If the document ID number is unknown, the operator can request to view or print a library index to locate a document on the OIS 140. The ability to select only a specific originator's document allows the operator to locate the document faster because only the specified person's documents are presented instead of the entire library. However, operators must strictly follow the procedures discussed above for document creation to allow this selection by originator. Although less time-consuming than indexing an entire library, this is an inefficient way of locating a document ID number.

To locate the lost document ID number for a document created on the Wang 5, the operator must check the diskette indexes to locate the desired document.

13. DOCUMENT BACK-UP

(1) Policy

Documents processed on the OIS 140 that are of a critical nature or may be used over a period of time (a week or more) should be immediately copied to a diskette for off-line storage. By doing this, the document exists both on the system disk and on the diskette. If there should be an equipment failure, the document can be accessed immediately by using the diskette on a Wang 5.

Documents processed on the Wang 5 are filed to diskette immediately after use is complete by the operator. If the Wang 5 used to prepare a document is

unavailable or inoperative when further operator actions are desired, the diskette is used to place a document on the OIS 140 or another Wang 5.

Examples of the types of documents that should be copied are:

- . Documents over five pages long
- . Documents prepared to go outside an office
- . Speeches (A/AID), Briefing Books (EXRL), CP (LEG), Articles (OPA), Listing of Outstanding Task Assignments, Due Dates, and Required Clearances (ES).

Diskette copies of documents shall not, however, be used in lieu of paper copies for Agency archival files.

(2) Procedures

Originators should notify operators if specific documents should be backed-up at the time of creation or revision. (Documents on the Wang 5 are always filed after use.) The following procedures should be followed on both the OIS 140 and the Wang 5s:

- . Use the work station in the CPU room or an archiving work station to make back-up copies of documents on the OIS 140.
- . When a document is revised, always copy (file if using a Wang 5) the revised document back to the same diskette that contained the original document. This assures that only one, the latest, version of the document is available on diskette.
- . Print an index of the diskette when new (not revised) documents are copied to the diskette.
- . When an OIS 140 document is no longer needed, delete it from the system disk and the back-up diskette. When a document has been used only on a Wang 5, delete it from the diskette. Mark the diskette index to indicate a document has been deleted.

14. DOCUMENT RETENTION/DELETION

(1) Policy

Documents which are no longer "active" or in use should be removed from the OIS 140 system disk. Removal of these "inactive" documents keeps disk space available for other, more current documents and prevents a noticeable degradation of response time when performing equipment functions. Therefore, it is very important that all staff, users and operators, help to ensure that only active documents are maintained on the system disk.

There are two ways of removing documents from the disk. The document can be deleted, when no longer needed or it can be filed (i.e., transferred) to diskette. A filed document can be retrieved from diskette, transferred back to the system disk, at any time for future revision or other use.

To facilitate the removal of inactive documents, each Lead Operator prints an index of the office library once a week. The index is used by originators to identify documents that can either be deleted or filed to diskette. The operators can then perform the action indicated by the originators.

In addition, the Assistant System Manager monitors the disk utilization percentage and notifies Lead Operators when this percentage is getting too high. A 75-80 percent disk utilization figure is considered the point at which documents must be removed.

(2) Procedures

The following steps are performed to facilitate the removal of inactive documents from the system disk on a regular basis:

- . When documents are created, the originator's name and probable deletion or filing date are entered in the document summary menu. (See Document Creation section of this chapter.)
- . Once a week, the Lead Operators run indices of the libraries with documents selected by originator names.

- . The indices are circulated to the appropriate originators with the request that any inactive document be marked for deletion or filing. The probable deletion or filing date printed in the comments section should help the originators make the decision.
- . Operators are given the indices and perform the indicated action.
- . The indices with deletions marked are returned to the Lead Operators. The ASM may request copies of these indices to facilitate the disk utilization monitoring responsibility.

If the disk utilization reaches the 70-75 percent range, the Assistant System Manager notifies Lead Operators immediately. The same steps discussed above are performed, except the originators must identify inactive documents within two days and operators must perform the requested action on the same day. If disk space is still too full, the Assistant System Manager will request that the above steps be taken again until disk availability space has reached an acceptable level.

15. MAINTENANCE OF GLOSSARIES

(1) Policy

As discussed earlier, glossaries are special documents used to store words, phrases, standard paragraphs, or instructions which are later recalled and inserted into a new document to reduce keying. Therefore, the policies and procedures that apply to other documents are applicable to glossaries. However, due to the nature of the information stored in glossaries and the possibility of system-wide applicability of this information, additional coordination of glossaries is required. Before creation on the system, an operator must receive approval of the glossary from the Assistant System Manager. When an operator creates a new glossary, its document name, ID number, and description of intended use must be provided to the System Manager. This coordination of glossaries is intended to eliminate duplication of effort and to facilitate the sharing of information among system users. Appendix F presents the information for the glossaries currently stored on the Wang 5s and the OIS 140.

(2) Procedures

The following procedures are to be used to ensure proper maintenance of glossaries:

- . The Assistant System Manager is responsible for coordinating and monitoring glossaries.
- . The Assistant System Manager will disseminate the information concerning the stored glossaries to operators and M/SER/DM.
- . Operators must secure Assistant System Manager approval before creating a new glossary.
- . Operators provide the Assistant System Manager the information described in the above policy when new glossaries are created.
- . Periodically the Assistant System Manager will print an index of the glossary library and, if necessary, request information on any glossary stored for which information has not been submitted.
- . Once information is submitted to the Assistant System Manager, the creator of the glossary should not delete or modify it without confirming with the Assistant System Manager that no one else needs access to the glossary.

16. FILE CREATION

(1) Policy

Files are usually created using the Wang list processing feature. To prevent a proliferation of duplicate files of information on the OIS 140, the guidelines contained in Appendix G of this manual are to be used when new files are created. As a file is created, a password should be assigned to prevent unauthorized access and usage of file data.

(2) Procedures

The file guideline in Appendix G is to be used to define user requirements to specify file data fields. When the record and file size are estimated, the Assistant System Manager is to be notified to calculate the potential system disk space usage and assign a password.

17. FILE RETENTION/DELETION

(1) Policy

The number of files and file sizes are to be kept to a minimum. Files used frequently, e.g., daily or weekly, can remain on the system disk. Only active records within a file are maintained on the system disk and inactive records should be deleted entirely from the file or filed onto diskette.

(2) Procedures

Operators are responsible for file maintenance tasks including:

- . Adding and editing records to the file
- . Deleting or filing inactive records from the file
- . Copying records and/or file onto diskettes as back-up copies.

When a file is to be deleted from the system disk, the operator should notify the Assistant System Manager that the file password is no longer in use and that disk space is now available for utilization planning. When active records become inactive and may require later reference, transfer (i.e., file) them onto diskette.

18. FILE BACK-UP

(1) Policy

A copy of the entire file should be placed onto diskette(s) for back-up purposes in case of equipment malfunction. File back-up should be performed after every major file edit. The actual data input sheet used to edit a record should be kept until the next file back-up procedure is performed.

(2) Procedures

- . For small files, output the entire file onto a word processing document and file the document onto a diskette
- . For large files, divide the file into logical segments via the select records feature;

output each segment into a word processing document; copy the document onto a diskette - one segment per diskette.

Each file or segment of a file should be copied onto a diskette which is properly labeled and stored. Appendix H of this manual presents diskette care guidelines.

OFFICE-SPECIFIC PROCEDURES

OFFICE-SPECIFIC PROCEDURES

This appendix provides the additional guidelines for staff use of the equipment in the individual offices. The Lead Operator should be consulted for any clarification of the procedures that is necessary.

A/AID

- . Hours of Operation - The work station in 5942 will be deactivated by the Lead Operator from close of business on Friday until Monday morning.
- . Use of Work Stations - There are no additional procedures.
- . Utiliation Statistics - It is not necessary to enter the "start time" and "end time" when completing the Daily Operation Log (see Chapter IV, Exhibit IV-1).
- . Use of Document ID Numbers - Operators should write this number on the back of the first page of each document using a non-photo blue pencil.

ES

- . Hours of Operation - There are no additional procedures.
- . Use of Work Stations - There are no additional procedures.
- . Utilization Statistics - It is not necessary to enter the "start time" and "end time" when completing the Daily Operation Log (see Chapter IV, Exhibit IV-1).
- . Use of Document ID Numbers - When a document is created, the operator must enter the requested information into the log book on the Lead Operator's desk.

ES/CCS

- . Hours of Operation - There are no additional procedures.

- . Use of Work Stations - There are no additional procedures.
- . Utilization Statistics - It is not necessary to enter the "start time" and "end time" when completing the Daily Operation Log (see Chapter IV, Exhibit IV-1).
- . Use of Document ID Numbers - Operators should write this number on the back of the first page of each document using a non-photo blue pencil.

EXRL

- . Hours of Operation - There are no additional procedures.
- . Use of Work Stations - There are no additional procedures.
- . Utilization Statistics - It is not necessary to enter the "start time" and "end time" when completing the Daily Operation Log (see Chapter IV, Exhibit IV-1).
- . Use of Document ID Numbers - When a document is created, the operator must enter the requested information into the log book on the Lead Operator's desk.

LEG

- . Hours of Operation - There are no additional procedures.
- . Use of Work Stations - There are no additional procedures.
- . Utilization Statistics - It is not necessary to enter the "start time" and "end time" when completing the Daily Operation Log (see Chapter IV, Exhibit IV-1).
- . Use of Document ID Numbers - There are no additional procedures.

EPA

- . Hours of Operation - The designated operators are responsible for turning the equipment on each morning.

- Use of Work Stations - Time on any OPA work station can be reserved in advance by completing the "start time" and "end time" columns on the Daily Operation Log (see Chapter IV, Exhibit IV-1) for the desired day.
- Utilization Statistics - There are no additional procedures.
- Use of Document ID Numbers - There are no additional procedures.
- Archive Diskettes - The Lead Operator maintains the office log books for archive diskettes.

1. SYSTEM NAME DESCRIPTION	2. REPORTS TO BE GENERATED	3. DATA TO BE STORED	4. CURRENT STATUS	5. NUMBER OF RECORDS	6. INPUT VOLUME FREQUENCY	7. SOURCES OF UPDATING INFO.	8. DATA MANIPULATIONS
<u>EXRL - EXTERNAL GROUPS</u>	Virtually all reports envisioned would be ad hoc, to produce a list of all organizations having specified characteristics, etc. as the need for such reports arise.	<ul style="list-style-type: none"> . Organization Name . Address . Subject, interest, other categorizations . Names of principals, titles . 10-12 other fields TBD 	Conceptual; some lists of organizations have been compiled but data is incomplete. System is in conceptual design phase.	<p>Continually growing until reaching an estimated maximum of 600 organizations.</p> <p>Record length will be an estimated 200 characters maximum.</p> <p>Data base size is an estimated 120K characters.</p>	<p>An estimated 5 records per week will be added. An estimated 30-40 updates will be made per week, at maximum. Update character volume will likely be small, as data base is fairly stable.</p>	Multiple sources.	Parametric search is most complex and most frequent function expected.

1. SYSTEM NAME DESCRIPTION	2. REPORTS TO BE GENERATED	3. DATA TO BE STORED	4. CURRENT STATUS	5. NUMBER OF RECORDS	6. INPUT VOLUME FREQUENCY	7. SOURCES OF UPDATING INFO.	8. DATA MANIPULATIONS
<u>EXH. -</u> <u>COMMUNICATIONS</u> <u>REVIEW BOARD</u>	Regular reports on CRB activity would occur monthly. Special inquiries would likely occur once per week.	<ul style="list-style-type: none"> . Publication Title . Publication Type and or Subject Code . Bureau/Office . Audience Code . Program Area . Cost Data TBD . Circulation No. . CRB Action . CRB Action Date . Other Fields TBD 	Manual; currently CRB data is maintained on Wang 5 W/P equipment. No complex manipulations are performed. Some format and design work remain before CRB could be transformed to a L/P ADP, or scaled back to a W/P (sort) application.	Continually growing, with an estimated maximum of 1000 records. There is no clear need to maintain all records on-line, but archiving procedures remain to develop. Record length is an estimated 200 characters. Data base size will be an estimated 200K max.	Input will be at an estimated rate of 20 per month, added bi-weekly. Little or no updating of existing records will occur.	OPM is the main source.	The most complex function required is unclear. Further investigation needed to determine if W/P sorting would suffice for the limited selection required. Otherwise, the application will require L/P. If all records are to be available on-line, an ADP application will need to be developed.

GLOSSARY OF TERMS

A

Alphabetic Data	Data composed exclusively of letters of the alphabet and the blank character. Occasionally, the period and the comma are also used.
Alphanumeric Data	Data containing letters, digits, and usually other characters such as punctuation marks.
Archival/Archive	To preserve and store information into a repository, such as a diskette, for later retrieval
Archival Work Station	A work station equipped with an attachment to create diskettes for off-line storage of documents processed on the OIS and for re-entry into the OIS system disk for further processing.
Author	The originator of a created document.

B

Back-up	A procedure, technique, or hardware intended to be used in an emergency to help cover lost or destroyed data or to keep a system running
Batch Processing	An approach to processing a number of similar input items during the same machine run

C

Cathode Ray Tube (CRT)	A device that presents data in visual form by means of controlled electron beams on a TV-like screen
------------------------	--

Central Processing Unit (CPU)	A master unit of the OIS system that includes the circuit controlling the interpretation and execution of instructions
Character	A letter, digit, or other symbol used as part of represented data
Character Keys	Standard typewriter keyboard keys
Configuration	The relative position, mix, or arrangement of equipment components which compose a system
Control Function	The Wang OIS capability to electronically survey equipment component status
Copy	The document/file maintenance procedure which duplicates system disk information onto diskette(s) for back-up purposes
Cursor	A light beam indicating where the next entered character or symbol will appear
	<u>D</u>
Daisy Printer	Wang output hardware which produces high quality paper documents at 30 to 40 characters per second
Disk	See system disk
Disk Operating System	The Wang capability permitting system disk monitoring and maintenance tasks and the ability to access other Wang functions such as word processing
Diskette	A flexible/floppy magnetic storage medium resembling a 45 rpm record which stores information off-line

Document	A portion of space and text conveying information (up to 120 screenloads) which the system treats as a single unit
Document ID Number	An indexed document identifier containing four digits and an alphabet character or space used to access a document for storage and retrieval purposes
Document Summary	A formatted screen or printed page displaying operator entered document name, operator name, author name, and comments, and Wang-produced document ID number and creation/usage statistics
	<u>E</u>
Edit	To select, emend, and revise information or data to make suitable for a particular purpose such as revising a previously created document for the purpose of final printing/output.
	<u>F</u>
Field	In a record, a specified area used for a particular category of data.
File	A collection of related records treated as a unit such as in list processing files
File to Diskette	The document/file maintenance procedure which removes information from the system disk or diskette and places it onto diskette and vice versa
Floppy Diskette	See Diskette.

Format Line	The Wang feature used to arrange or organize space and text on a document page such as tab stops, vertical spacing, and line length.
	<u>G</u>
Glossary	The Wang feature which permits the storage of words, phrases, paragraphs, and instructions in a special library for later recall into another document
	<u>H</u>
Hardware	Physical equipment such as mechanical, magnetic, electrical, or electronic devices
Horizontal Scrolling	The CRT and keyboard feature which permits the user to view a line length of up to 158 characters
	<u>K</u>
Key Field	A field used to sort a file into a particular sequence. In ascending order, the record with the lowest-valued key field (for example, Apple) is the first record; the record with the highest-valued key field (for example, Zebra) is the last record. If preceded by a DEC TAB, the key fields will be aligned on the decimal points and then sorted.
	<u>L</u>
Library	The Wang feature which automatically catalogs documents indexed via an alphabet letter or space. The last character of the document ID number identifies the library.

M

Menu A formatted screen requiring a user to select an activity in order to proceed to other Wang menus or tasks

Modem A device used to link two components by telephone line interconnection.

O

Off-line Pertaining to equipment or devices not under the control of the central processing unit such as diskettes

OIS 140 Office Information System 140 (Model I) -- is an advanced shared-logic word processing system consisting of a CPU and a variety of work stations, printers and other attachments. It allows for the creation, editing and transmission of a document as well as a host of other document specific functions, e.g., paragraph numbering, math support, and pagination.

On-line Pertaining to equipment or devices under the control of the central processing unit such as the system disk

Operating System Software that controls the execution of OIS programs such as list processing, powerful editing and may provide input/output control, storage assignment, scheduling and related OIS services

Operations Keys The Wang keys located across the top and at the right of character keys on the workstation keyboard. These keys perform the format, locate, and edit functions.

Operator	Usually a person whose assigned regular duties include performing tasks on the Wang OIS keyboard and printer
Originator	The author of a created document
	<u>P</u>
Password	A secret group of characters used for identification that must be keyed on the Wang system if assigned to protect a document, file, or function in order to enter and/ or perform a particular function
Peripheral Equipment	Any unit of equipment which is connected to the central processing unit and acts as an extension of the CPU, e.g., a printer
Policy	A statement designed to organize and regulate
Print Summary	A formatted screen or printed page displaying operator-selected options used to format the print functions of an output document
Procedures	A particular way of doing or going about the accomplishment of a policy
	<u>R</u>
Record	A collection of related data items contained in fields treated as a unit; a complete set of records form a file
	<u>S</u>
Screenload	A collection of space and text which occupy one visual display (20 lines) of the Wang CRT screen

Sequence Number	A Wang-generated number used to identify and access a record of a list processing file. This number occupies the first field of each record.
Shared-logic System	A configuration where peripheral equipment share the arithmetic and logic operations of the central processing unit
Sheet Feeder	See Twin Sheet Feeder
Software	A set of OIS programs and internal procedures that govern operation of the Wang system
Standalone System	A self-contained word processing system able to perform all phases of processing independent of a central processing unit
System Management Staff	The body of persons responsible for the activities which plan, organize and control the Wang system in accordance to established and approved policies and procedures
System Disk	A flat disk-shaped magnetic medium used to store information and software usually on-line
System Diskette	A non-removable diskette containing information controlling the operation of the system and also providing on-line storage of text
System User	A person whose assigned duties do not include regular activities on the Wang system but who occasionally accesses or uses the system

T

Transaction Keys

Special function keys used to tell the system to complete or cancel an operation or procedure

Twin Sheet Feeder

A Wang equipment feature which automatically feeds single sheets of paper into a printer for document output

W

Work Station

The Wang physical work area containing a cathode ray tube and a keyboard of character, operation, and transaction keys

Wraparound

The Wang capability which automatically places text on the next line of a page when it reaches and goes beyond the established line length

DOCUMENT REVISION GUIDELINES

Revisions written on previously typed documents should be clear and distinct. The standard proofreader marks on the following pages should be used wherever possible. To shorten the revision cycle and ensure accuracy:

- Write insertions or changes in red ink and place a checkmark in the right margin. Avoid using a light pencil or a blunt felt tip pen.
- Do not cut, paste, or use correction fluid (e.g., snopake or white out) on the typed document. Keep pages in proper sequence. If text is to be rearranged, say, "move to page ___" or indicate by an asterisk where attached information is to be typed.
- Lengthy inserts should be written or typed on a separate sheet of paper and attached to the original copy, with indications as to where new text is to be inserted.

IMPORTANT: When submitting a document for revision, provide the document ID number to the operator for easier and faster access to the document.

STANDARD REVISION MARKS

<u>SYMBOL</u>	<u>DEFINITION</u>
∪ or ∂ or 7	delete; take it out
○	close up; print as <u>one</u> word
⊖	delete and <u>close</u> up
^ or > or <	caret; insert <u>here</u> something
≠	insert <u>space</u>
eg #	space evenly <u>^</u> where indicated
stet	let marked text stand as set
⋈	transpose, change <u>(order the)</u>
/	used to separate two or more marks and often as a concluding stroke at the end of an insertion
⌊	<u>set</u> farther to the left
⌋	<u>set</u> farther to the right
≡	straighten <u>align</u> ment
	straighten or align
⊗	imperfect or broken character
□	indent or insert em quad space
¶	begin a new paragraph
Ⓟ	spell out -- 5 lbs. as five pounds
cap	set in <u>capitals</u> (CAPITALS)
sm cap or S.C.	set in small capitals (SMALL CAPITALS)
lc	set in <u>lowercase</u> (lowercase)

STANDARD REVISION MARKS

<u>SYMBOL</u>	<u>DEFINITION</u>
<i>ital</i>	set in <u>italic</u>
bf	set in <u>boldface</u>
—	hyphen
∨	superscript or superior (as in $\pi^{\vee} r^2$)
^	subscript or inferior (as in H ₂ O)
∧ or ∨	centered (∧ for a centered dot in p.g)
∧	comma
∨	apostrophe
⊙	period
; or ;/	semicolon
: or ⊙	colon
”	quotation marks
(/)	parentheses
□ / □	brackets
OK/?	query to author: has this been set as intended?
□	move up or move down
no ¶	no paragraph
□ □	centered matter
cap + ll	capitalize first; lower case remainde:

~~MISSILES AND SPACE~~

LIBRARY ASSIGNMENTS

<u>Office</u>	<u>Library</u>
Office of the Administrator	
. Administrator	A
. Deputy Administrator	B
. Counselor to the Administrator	C
Office of the Executive Secretary	D
Office of Legislative Affairs	
. Director's Office	E
. Program Presentation and Legislative Projects Division	F
. Congressional Liaison Staff	G
Office of External Relations	H
Office of Public Affairs	
. Director's Office	I
. Publications Division	J
. News and Media Relations Division	K
. Public Inquiries Division	L
Training Library	T

NOTE: All work stations are set to display library "w" when Create New Document is selected. An operator must type the correct assigned library letter before beginning the document creation process.

GLOSSARIES

UNDER DEVELOPMENT

LIST PROCESSING FILE
CREATION GUIDELINES

What is List Processing?

List Processing is a records-processing package which can reduce the need for paper files at various office locations. List Processing allows operators to create and maintain records of user-defined information. These records, together, form a file and can be selectively retrieved, sorted, and printed according to user-specified criteria. However, List Processing is not a true data processing application package.

* * * * *

The purpose of these guidelines is to help Wang users specify requirements of a proposed list processing file. Answer the following questions as they pertain to your proposed file application.

1. What is the purpose of the proposed list processing file? Does the purpose conform to the above definition of list processing?
2. What proposed reports, forms, letters, labels, and other documents will be produced using data from this file?
3. What inquiries or questions will the file be expected to answer and how?

4. What types of information or data will be captured in this file in order to produce the documents or to answer the inquiries listed above? List all data fields of the file and specify each field length and field type (alphabetic, numeric, alphanumeric)?

<u>Field name</u> (10-character limit)	<u>Field length</u>	<u>Field type</u>
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5. How many records do you expect the entire file to contain? _____
6. How many times a week will the file be accessed for:
- | | |
|-------------------------|-------|
| a. Adding new records? | _____ |
| b. Editing old records? | _____ |
| c. Deleting records? | _____ |
| d. Backing-up records? | _____ |
| e. Staff inquiries? | _____ |
| f. Document generation? | _____ |
7. How long will the proposed file be active on the system disk? _____
8. Who will be responsible for file:
- | | |
|------------------|-----------------------------------|
| a. Creation? | _____ |
| b. Maintenance? | _____ |
| | (data entry, update, and back-up) |
| c. Verification? | _____ |
| | (data integrity) |

Consult the Assistant System Manager for password assignment and disk space utilization estimate.

CARE OF DISKETTES

Diskettes contain important information and require special care. Damaged diskettes can also adversely affect the Wang system. A diskette that is physically damaged (torn, erased, warped) or contaminated may cause the system's read/write head to lift from the diskette, resulting in errors or head contamination. The following recommendations are made to assist you in caring for diskettes:

- . Storage - Store diskettes in their jackets or envelopes. When removing a diskette from a jacket, lift it by the top edge and carefully insert it into the disk drive. Return the diskette to its envelope and place it in a proper storage facility such as a filing cabinet. Improper storage can cause permanent damage. Diskettes can be stored flat - not more than ten to a pile, or can be stored vertically. If stored vertically, diskette must be supported so that they will not slump, bend, or cause problems for the Wang system.
- . Handling - Diskettes are sensitive to several environmental conditions in the office, such as temperature, dust, and to contact with certain types of office supplies and materials.
 - Extremes of heat and cold can affect diskettes. Avoid exposing them to sunlight (window sills) or heat (heaters, radiators).
 - Never place a paperweight, telephone, or any other heavy object on a diskette
 - Never clip a hard copy or anything else to a diskette.
 - Use only a felt-tipped pen when writing on a diskette label. Ballpoint or pencil pressure may inadvertently emboss the surface of the diskette. If labels are used, they should be placed to the right of the trademark label. When applying labels, make sure that the adhesive does not touch the exposed inner areas of the diskettes.

- Never file diskettes between packs of paper--keep them in a clear and dust-free container or area
- Do not touch the exposed areas on the diskettes. Natural hand oils or hand lotions, etc., are contaminants and can cause problems for diskettes.
- Keep magnets away from diskettes as they will erase data. Be aware of magnets on copy stands.