

IMPACT Database User Guide (Integrated, Management, Planning and Control Tool)

HOW TO SEARCH & OTHER FEATURES

Login to IMPACT, the database is accessible through the link provided here:

<https://www-esh.fnal.gov/pls/apex/f?p=129>

You need permission to add and edit work packages in the DB.

If you have issues logging into the database, please contact kathy@fnal.gov to get access.

Revision History

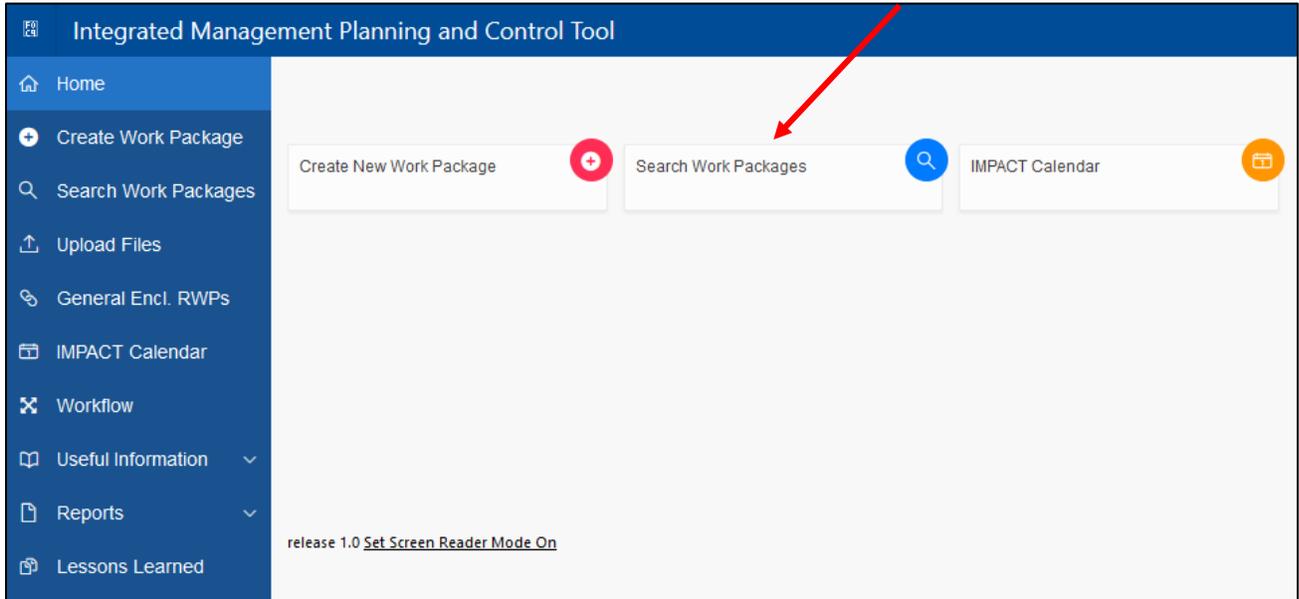
Name	Description	Date
Kathy Vuletich	Added sections on how to customize search results screen, and how to edit a work package from the search results screen.	September 2020
Kathy Vuletich	Initial Release	September 2019
Kathy Vuletich	Updated search screen adding search by estimated start/end dates, and by form/permit number.	December 2019

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HOW TO SEARCH

- From the IMPACT homepage, click on “[Search Work Packages](#)” either from the left navigation menu, or the main landing page.



Integrated Management Planning and Control Tool

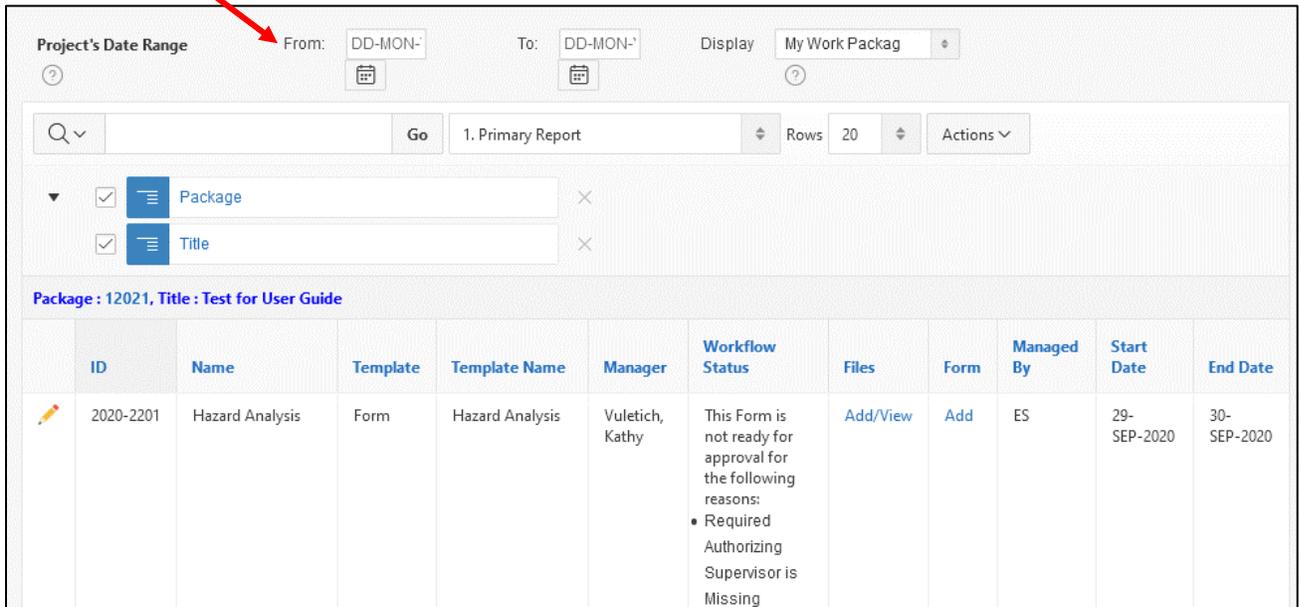
- Home
- Create Work Package
- Search Work Packages**
- Upload Files
- General Encl. RWPs
- IMPACT Calendar
- Workflow
- Useful Information
- Reports
- Lessons Learned

Create New Work Package Search Work Packages IMPACT Calendar

release 1.0 [Set Screen Reader Mode On](#)

- Search by the following choices

- Select a date range in the “From:” and “To:” fields. This will narrow down the search results based on the start and end dates of the work package.



Project's Date Range From: DD-MON-' To: DD-MON-' Display My Work Packag

Go 1. Primary Report Rows 20 Actions

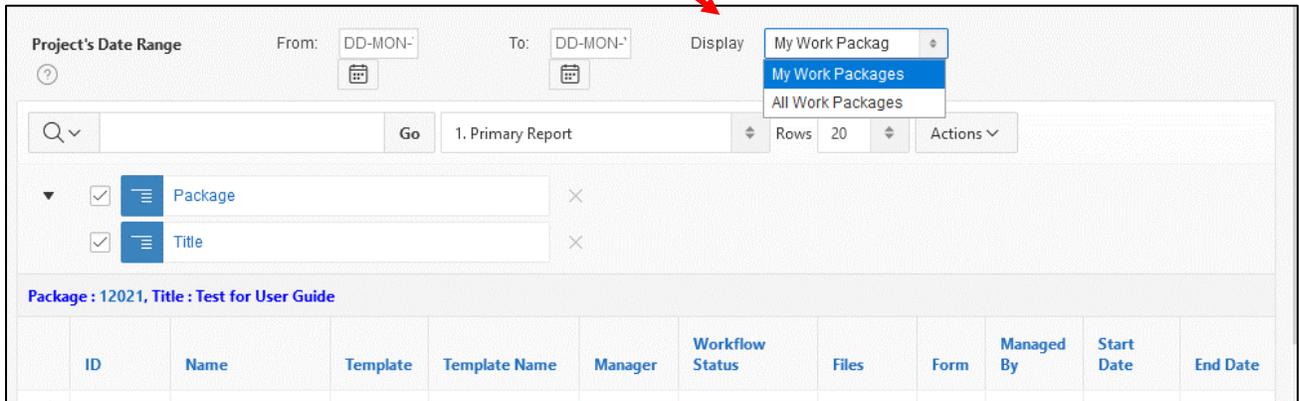
Package

Title

Package : 12021, Title : Test for User Guide

ID	Name	Template	Template Name	Manager	Workflow Status	Files	Form	Managed By	Start Date	End Date
2020-2201	Hazard Analysis	Form	Hazard Analysis	Vuletich, Kathy	This Form is not ready for approval for the following reasons: <ul style="list-style-type: none"> Required Authorizing Supervisor is Missing 	Add/View	Add	ES	29-SEP-2020	30-SEP-2020

- b. Select to display your work packages or all work packages by utilizing the “Display” dropdown menu.
 - i. Selecting to view “My Work Packages” will show only your work packages.
 - ii. Selecting to view “All Work Packages” will show all work packages in the system.



Project's Date Range From: DD-MON- To: DD-MON- Display My Work Packag

My Work Packages

All Work Packages

Q Go 1. Primary Report Rows 20 Actions

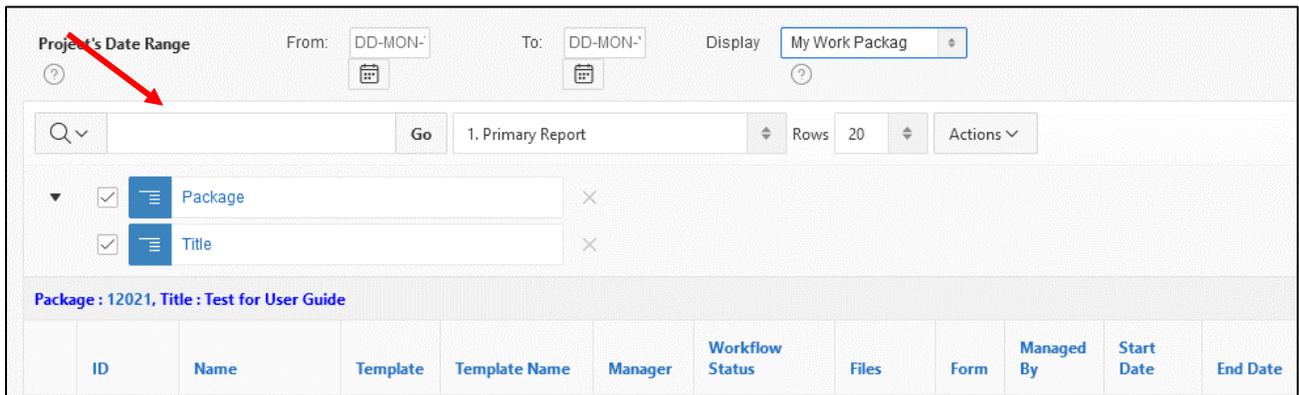
Package

Title

Package : 12021, Title : Test for User Guide

ID	Name	Template	Template Name	Manager	Workflow Status	Files	Form	Managed By	Start Date	End Date
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- c. Enter in a word or phrase in the text search field



Project's Date Range From: DD-MON- To: DD-MON- Display My Work Packag

Q Go 1. Primary Report Rows 20 Actions

Package

Title

Package : 12021, Title : Test for User Guide

ID	Name	Template	Template Name	Manager	Workflow Status	Files	Form	Managed By	Start Date	End Date
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- i. Optional - Clicking the eyeglass dropdown to the left of the text field allows you to limit your data field search. Default is to search ALL data fields for the word or phrase.



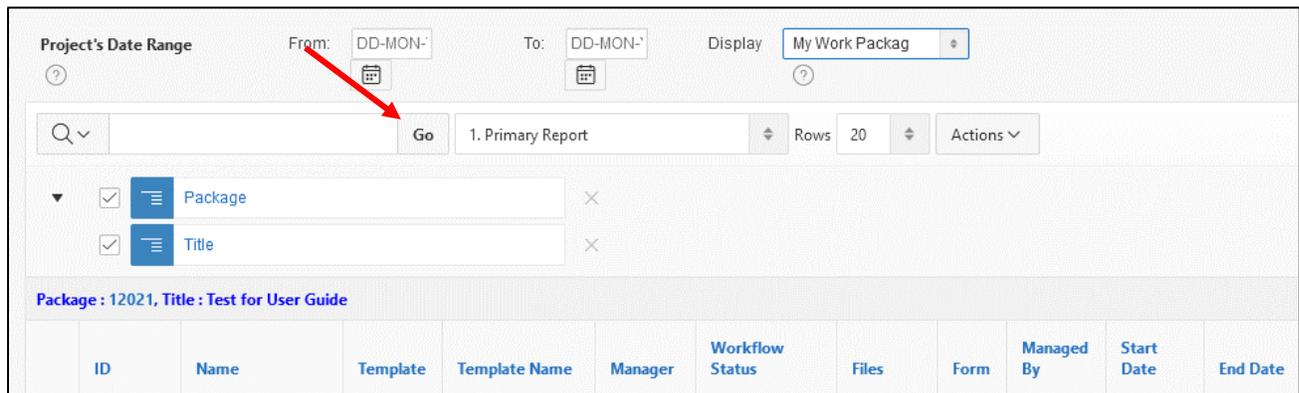
- ii. Optional - The grouping dropdown allows you to group the search results by:
1. Primary Report – Default
 2. Grouped by Manager
 3. Grouped by Owning Organization



- iii. Optional – The rows dropdown allows you to select how many records you see per page.



- iv. Click “Go” when ready



ID	Name	Template	Template Name	Manager	Workflow Status	Files	Form	Managed By	Start Date	End Date
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d. Sort and search like Excel

i. ALL headers of columns can be clicked, and a small menu opens.

Project's Date Range From: DD-MON- To: DD-MON- Display My Work Packag

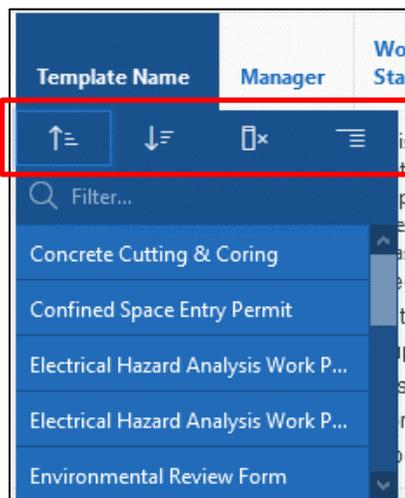
1. Primary Report Rows 20 Actions

Package Title

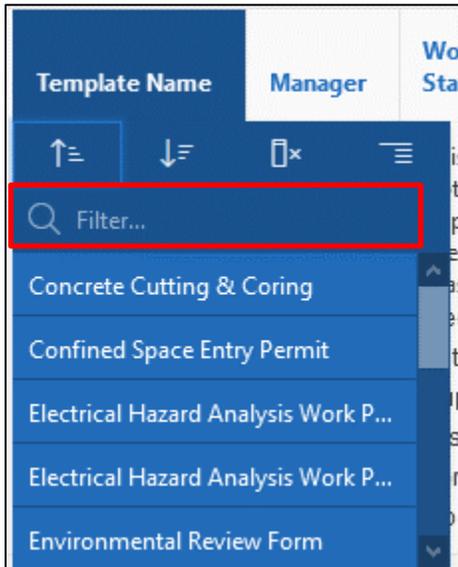
Package : 12021, Title : Test for User Guide

ID	Name	Template	Template Name	Manager	Workflow Status	Files	Form	Managed By	Start Date	End Date
2020-2201	Hazard Analysis	Form	Hazard Analysis	Vuletich, Kathy	This Form is not ready for approval for the following reasons: <ul style="list-style-type: none"> Required Authorizing Supervisor is Missing Form Contains No Data 	Add/View	Add	ES	29-SEP-2020	30-SEP-2020
Package : 12004, Title : fire alarm repair										
2020-2165	Hazard Analysis	Form	Hazard Analysis	Schlatter, Eric	This Form is not ready for approval for the following reasons: <ul style="list-style-type: none"> Required Authorizing Supervisor is Missing Form Contains No Data 	Add/View	Add	ES	21-SEP-2020	28-SEP-2020

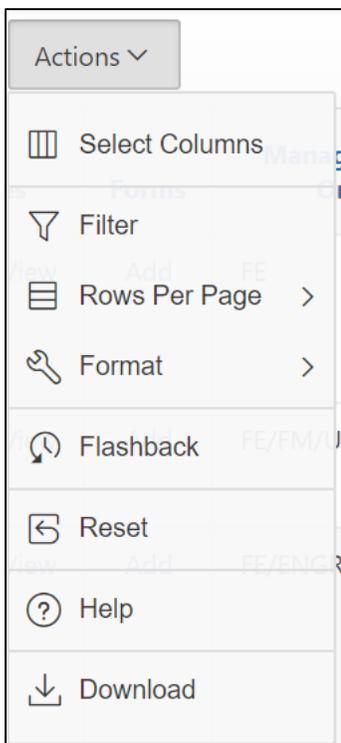
- Sort ascending (1) or descending (2)
- Hide the column (3)
- Enter a control break (4)



4. Search on the column and filter the results by entering word(s) in the search field or selecting it from the scroll list.

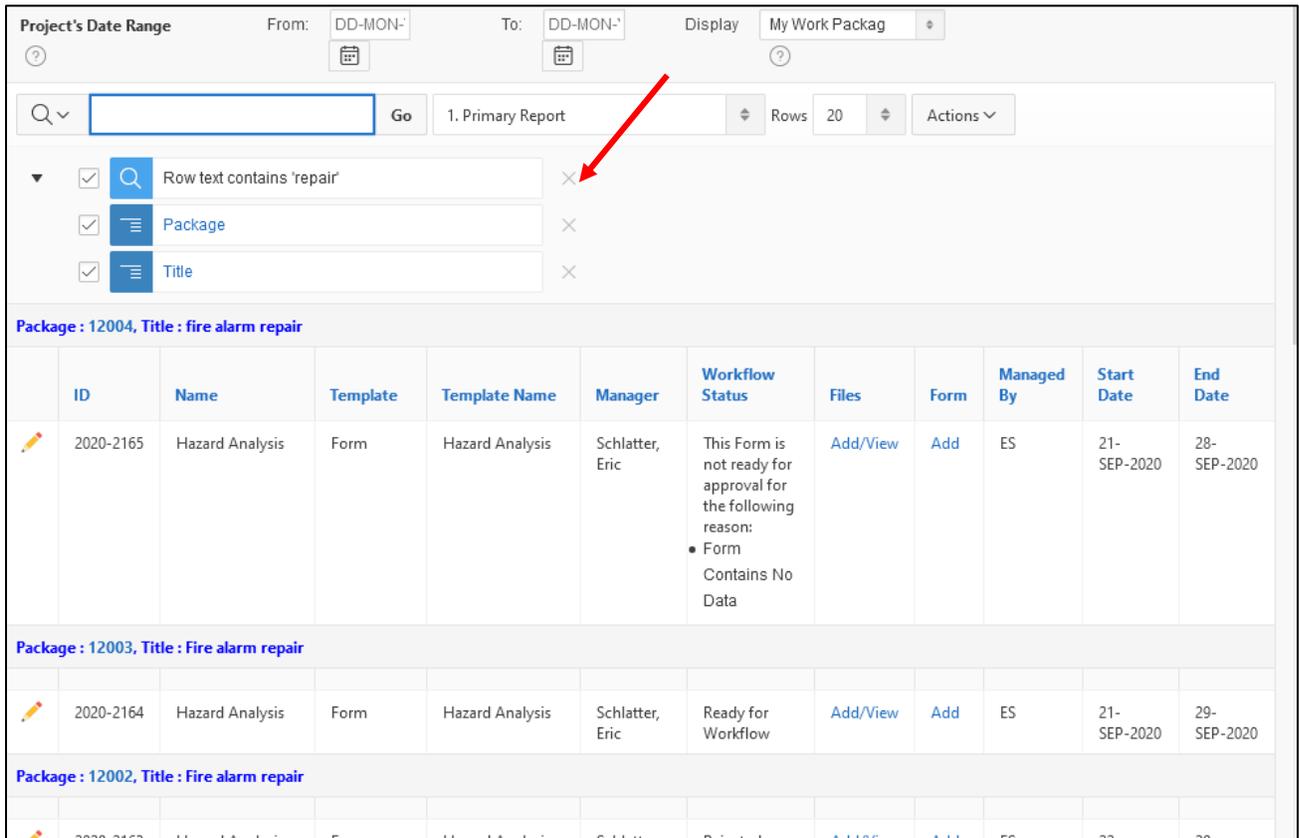


- e. Use the “[Actions](#)” menu to perform similar actions



- i. “Select Columns” - Select the columns to show in your search results
- ii. “Filter” - Filter the columns like Excel
- iii. “Rows Per Page” - Change the number of results you see per page
- iv. “Format” - Format your search results
- v. “Flashback” - Flashback to a moment in time to view previous search results
- vi. “Reset” - Reset the results to the default list
- vii. “Help” – Help with searching
- viii. “Download” - Download to external format

3. To remove any parameters from the search results, click the “x” next to the item.



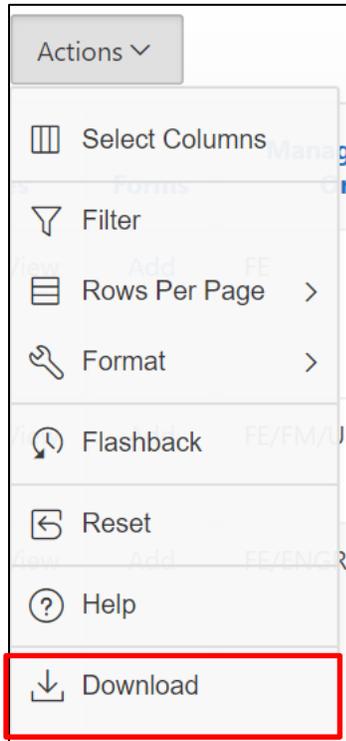
ID	Name	Template	Template Name	Manager	Workflow Status	Files	Form	Managed By	Start Date	End Date
Package : 12004, Title : fire alarm repair										
2020-2165	Hazard Analysis	Form	Hazard Analysis	Schlatter, Eric	This Form is not ready for approval for the following reason: • Form Contains No Data	Add/View	Add	ES	21-SEP-2020	28-SEP-2020
Package : 12003, Title : Fire alarm repair										
2020-2164	Hazard Analysis	Form	Hazard Analysis	Schlatter, Eric	Ready for Workflow	Add/View	Add	ES	21-SEP-2020	29-SEP-2020
Package : 12002, Title : Fire alarm repair										
2020-2162	Hazard Analysis	Form	Hazard Analysis	Schlatter, Eric	Rejected	Add/View	Add	ES	22-SEP-2020	28-SEP-2020

4. The parameter has been removed from the search results and the screen has refreshed with the results.

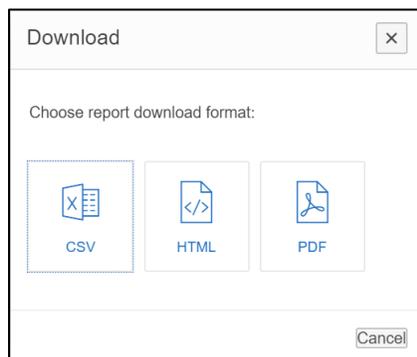
HOW TO EXPORT SEARCH RESULTS

Any search results can be downloaded and exported to a CSV Excel file, HTML, or a PDF.

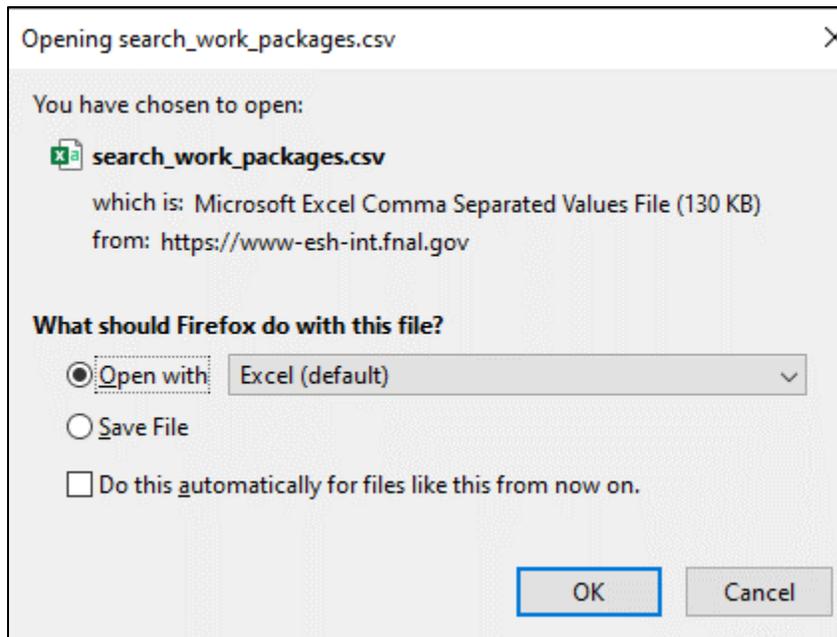
1. Click on the “[Actions](#)” menu in the search screen and click on “[Download](#)”.



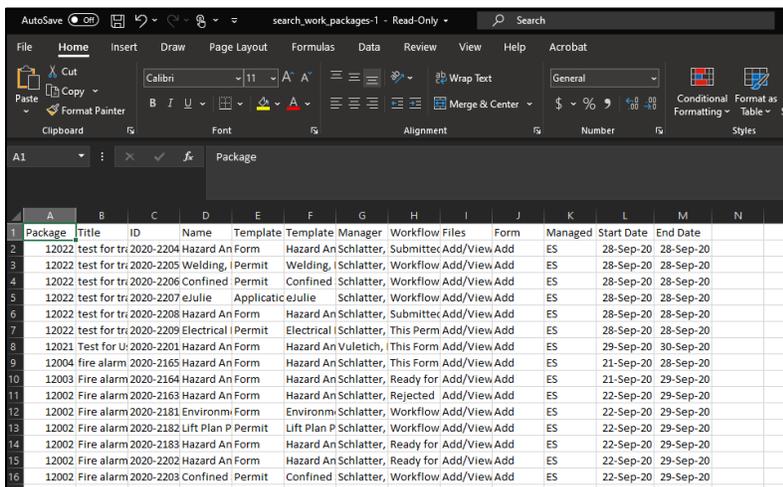
2. Choose the file format you wish to export to.



3. In this example, a .csv file was chosen, and the browser is FireFox.
 - a. Click Open with Excel
 - b. Or Save File
4. Click “OK”.



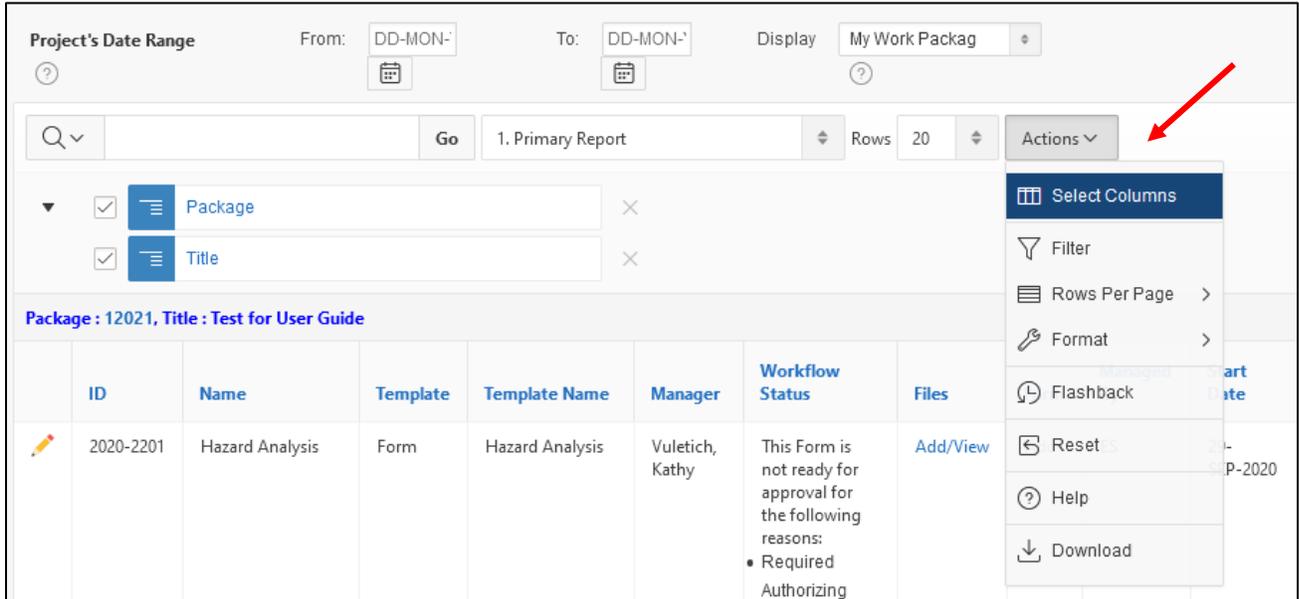
5. In this example the selection was to open with Excel. The file opened in Excel and the file successfully downloaded.



Package	Title	ID	Name	Template	Manager	Workflow Files	Form	Managed	Start Date	End Date
12022	test for tr:2020-2204 Hazard An Form		Hazard An Schlatter, Submitte	Add/View	Add	ES	28-Sep-20	28-Sep-20		
12022	test for tr:2020-2205 Welding, I Permit		Welding, I Schlatter, Workflow	Add/View	Add	ES	28-Sep-20	28-Sep-20		
12022	test for tr:2020-2206 Confined Permit		Confined Schlatter, Workflow	Add/View	Add	ES	28-Sep-20	28-Sep-20		
12022	test for tr:2020-2207 eJulie Applicatio		eJulie Schlatter, Workflow	Add/View	Add	ES	28-Sep-20	28-Sep-20		
12022	test for tr:2020-2208 Hazard An Form		Hazard An Schlatter, Submitte	Add/View	Add	ES	28-Sep-20	28-Sep-20		
12022	test for tr:2020-2209 Electrical I Permit		Electrical I Schlatter, This Perm	Add/View	Add	ES	28-Sep-20	28-Sep-20		
12021	Test for U:2020-2201 Hazard An Form		Hazard An Vuletich, I This Form	Add/View	Add	ES	29-Sep-20	30-Sep-20		
12004	fire alarm 2020-2165 Hazard An Form		Hazard An Schlatter, This Form	Add/View	Add	ES	21-Sep-20	28-Sep-20		
12003	Fire alarm 2020-2164 Hazard An Form		Hazard An Schlatter, Ready for	Add/View	Add	ES	21-Sep-20	29-Sep-20		
12002	Fire alarm 2020-2163 Hazard An Form		Hazard An Schlatter, Rejected	Add/View	Add	ES	22-Sep-20	29-Sep-20		
12002	Fire alarm 2020-2181 Environm		Environm Schlatter, Workflow	Add/View	Add	ES	22-Sep-20	29-Sep-20		
12002	Fire alarm 2020-2182 Lift Plan P Permit		Lift Plan P Schlatter, Workflow	Add/View	Add	ES	22-Sep-20	29-Sep-20		
12002	Fire alarm 2020-2183 Hazard An Form		Hazard An Schlatter, Ready for	Add/View	Add	ES	22-Sep-20	29-Sep-20		
12002	Fire alarm 2020-2202 Hazard An Form		Hazard An Schlatter, Ready for	Add/View	Add	ES	22-Sep-20	29-Sep-20		
12002	Fire alarm 2020-2203 Confined Permit		Confined Schlatter, Workflow	Add/View	Add	ES	22-Sep-20	29-Sep-20		

HOW TO CUSTOMIZE SEARCH RESULTS

1. From the Search screen, click on the “[Actions](#)” dropdown menu and click “[Select Columns](#)”.



Project's Date Range From: DD-MON- To: DD-MON- Display My Work Packag

Search: 1. Primary Report Rows: 20 Actions

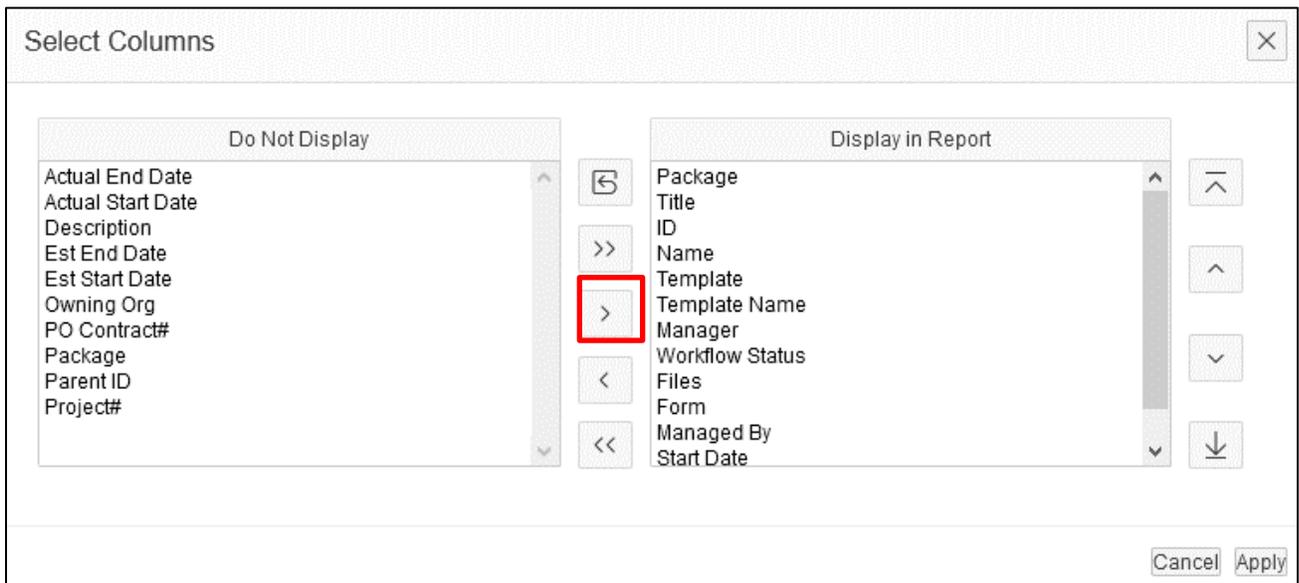
Selected Columns: Package, Title

Package: 12021, Title: Test for User Guide

ID	Name	Template	Template Name	Manager	Workflow Status	Files
2020-2201	Hazard Analysis	Form	Hazard Analysis	Vuletich, Kathy	This Form is not ready for approval for the following reasons: • Required Authorizing	Add/View

Actions menu options: Select Columns, Filter, Rows Per Page, Format, Flashback, Reset, Help, Download

2. The Select Columns box opens. The items in the left side of the table are items you can add to your search results, and the items on the right side of the table already exist in your search results.
3. To move an item to be displayed, highlight the item and then click the right arrow button.



Select Columns

Do Not Display

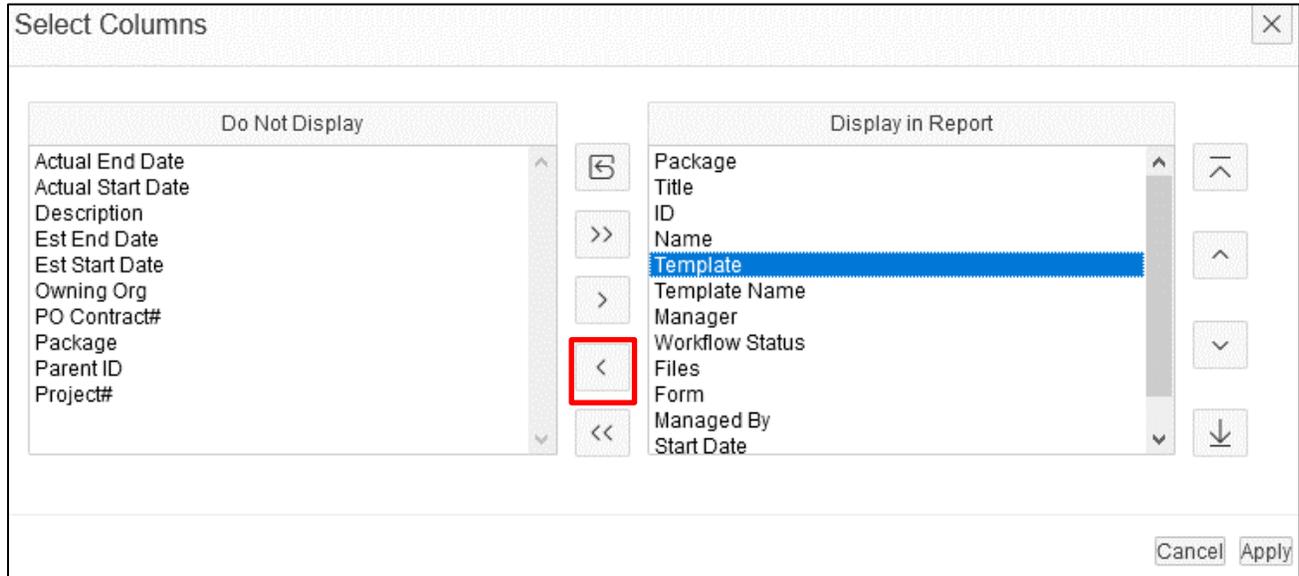
- Actual End Date
- Actual Start Date
- Description
- Est End Date
- Est Start Date
- Owning Org
- PO Contract#
- Package
- Parent ID
- Project#

Display in Report

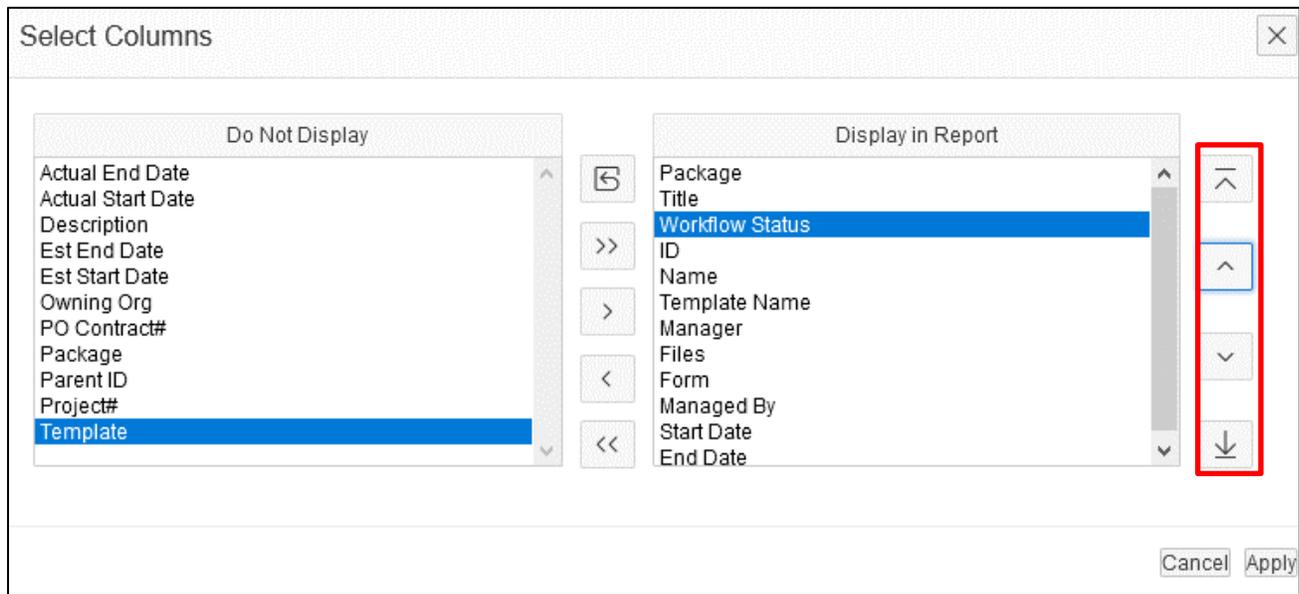
- Package
- Title
- ID
- Name
- Template
- Template Name
- Manager
- Workflow Status
- Files
- Form
- Managed By
- Start Date

Buttons: Cancel, Apply

- To remove an item from the display, highlight the item and then click the left arrow button.



- To change the order the items appear on the screen, highlight an item and use the up and down arrows to the right of the table to move them to the desired location.
- When done, click “[Apply](#)”.



7. The search results screen will update with your selections.

Project's Date Range From: DD-MON-' To: DD-MON-' Display My Work Packag

Go 1. Primary Report Rows 20 Actions

Package Title

Package : 12022, Title : test for training

	Workflow Status	ID	Name	Template Name	Manager	Files	Form	Managed By	Start Date	End Date
	Submitted	2020-2204	Hazard Analysis - Location #1	Hazard Analysis	Schlatter, Eric	Add/View	Add	ES	28-SEP-2020	28-SEP-2020
	Workflow not required for this Permit	2020-2205	Welding, Burning, Brazing, Spark Production Operations Permit (Burn Permit)	Welding, Burning, Brazing, Spark Production Operations Permit (Burn Permit)	Schlatter, Eric	Add/View	Add	ES	28-SEP-2020	28-SEP-2020
	Workflow not required for this Permit	2020-2206	Confined Space Entry Permit	Confined Space Entry Permit	Schlatter, Eric	Add/View	Add	ES	28-SEP-2020	28-SEP-2020
	Workflow not required for this Permit	2020-2207	eJulie	eJulie	Schlatter, Eric	Add/View	Add	ES	28-SEP-2020	28-SEP-2020

8. To remove the custom view and restore the search results to the default, click the “Actions” dropdown box, and then select “Reset”.

Project's Date Range From: DD-MON-' To: DD-MON-' Display My Work Packag

Go 1. Primary Report Rows 20 Actions

Package Title

Package : 12022, Title : test for training

	Workflow Status	ID	Name	Template Name	Manager	Files	Form	Managed By	Start Date	End Date
	Submitted	2020-2204	Hazard Analysis - Location #1	Hazard Analysis	Schlatter, Eric	Add/View	Add	ES	28-SEP-2020	28-SEP-2020
	Workflow not required for this Permit	2020-2205	Welding, Burning, Brazing, Spark Production Operations Permit (Burn Permit)	Welding, Burning, Brazing, Spark Production Operations Permit (Burn Permit)	Schlatter, Eric	Add/View	Add	ES	28-SEP-2020	28-SEP-2020
	Workflow not required for this Permit	2020-2206	Confined Space Entry Permit	Confined Space Entry Permit	Schlatter, Eric	Add/View	Add	ES	28-SEP-2020	28-SEP-2020

Actions dropdown menu:

- Select Columns
- Filter
- Rows Per Page >
- Format >
- Flashback
- Reset**
- Help
- Download

9. Click “Apply”.



10. The screen will restore to the default results list.

Project's Date Range		From: DD-MON-	To: DD-MON-	Display	My Work Packag					
<input type="text"/> <input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>					
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>					
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
Package : 12022, Title : test for training										
ID	Name	Template	Template Name	Manager	Workflow Status	Files	Form	Managed By	Start Date	End Date
2020-2204	Hazard Analysis - Location #1	Form	Hazard Analysis	Schlatter, Eric	Submitted	Add/View	Add	ES	28-SEP-2020	28-SEP-2020
2020-2205	Welding, Burning, Brazing, Spark Production Operations Permit (Burn Permit)	Permit	Welding, Burning, Brazing, Spark Production Operations Permit (Burn Permit)	Schlatter, Eric	Workflow not required for this Permit	Add/View	Add	ES	28-SEP-2020	28-SEP-2020
2020-2206	Confined Space Entry Permit	Permit	Confined Space Entry Permit	Schlatter, Eric	Workflow not required for this Permit	Add/View	Add	ES	28-SEP-2020	28-SEP-2020

HOW TO EDIT A WORK PACKAGE

1. To edit a work package, utilize the search screen to find the work package to be edited.
2. Once found, click on the pencil icon next to the item to be edited, or click on the work package ID.

Project's Date Range From: DD-MON- To: DD-MON- Display My Work Packag

Search: [] Go 1. Primary Report Rows 20 Actions

Package Title

Package : 12022, Title : test for training

ID	Name	Template	Template Name	Manager	Workflow Status	Files	Form	Managed By	Start Date	End Date
 2020-2204	Hazard Analysis - Location #1	Form	Hazard Analysis	Schlatter, Eric	Submitted	Add/View	Add	ES	28-SEP-2020	28-SEP-2020
 2020-2205	Welding, Burning, Brazing, Spark Production Operations Permit (Burn Permit)	Permit	Welding, Burning, Brazing, Spark Production Operations Permit (Burn Permit)	Schlatter, Eric	Workflow not required for this Permit	Add/View	Add	ES	28-SEP-2020	28-SEP-2020
 2020-2206	Confined Space Entry Permit	Permit	Confined Space Entry Permit	Schlatter, Eric	Workflow not required for this Permit	Add/View	Add	ES	28-SEP-2020	28-SEP-2020