Moving around OPAS

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1.   Logging on

The method of running OPAS will depend on the operating system used by your PC. If your PC is running Windows 95, 98 or NT, selecting the OPAS icon from the Windows Desktop runs OPAS.

When you double click on the OPAS icon you will be asked for your User ID. During the 'Familiarisation session' each person who needs to use the system will have been set up as a user. User names must be unique and unless you have asked otherwise we will have set them up to be your forename. (New members of staff will need to be set up in Utilities – Users. See Utilities – Note 37. Users)

Type in your user id and press **Enter**

You are then asked for your password. **This must be entered in the correct case i.e. if your password has been set up in capital letters then you must type your password in upper case. When we set your initial password, it will be in capital letters.**

Type in your password and press **Enter**

If you get the error Invalid Password then you have either typed the wrong password or you have typed it in the wrong case. You will get three attempts to get your password correct. If the password is typed in incorrectly three times you will be taken out of the log on screen and you will have to double click on the OPAS icon to start again.

Your User ID determines what parts of the system you can use: if you forget either your User ID or your password, or you find you need to access parts of the system which are only available to the administrator, please ask your system administrator.

It is a good idea to keep your password a secret. It is a **bad** idea to write it down, so try to make it easy to remember, without being too easy to guess!

Your password can be changed at any time by selecting Utilities – Password.

Training Area

By logging on with the User ID of Trainee you will be taken into a training session of OPAS, which is completely separate to your live system. It is the ideal place to practice in as you can do anything you like without affecting your live data.

The ways in which you can use the keyboard and the mouse to select the different menu options are covered below. You should become familiar with this section before proceeding, so that you are confident with using the keyboard and the mouse or whatever combination suits you best.

2.   Box menus

An item on a box menu such as the main menu can be selected by:

double-clicking with the left mouse button on the item required (move the tip of the cursor arrow onto the item, then click twice in quick succession with the left mouse button)

pressing the first letter of that item on the keyboard:

if that letter is unique (i.e. no other item on that menu begins with the same letter), the item is selected immediately

if another menu item begins with the same letter, the selection box moves to the first item beginning with that letter: pressing the letter again moves the selection box to the next menu item beginning with that letter; when the right item is selected, press **Enter**.

using the cursor keys (arrow keys), move the selection box to the required item, then press **Enter**.

using the space bar and backspace key, move the selection box to the required item, and then press **Enter**.

3.   Icons

Once you select an option such as **Patients**, icons will show near the top of the screen. Very occasionally, icons may seem to be missing: if this happens, quit out of OPAS and run the system again to bring them back.

Icons are a quick way of accessing some of the more common actions you will carry out.

To select an icon, single click with the left mouse button on that icon. Remember that the tip of the cursor arrow must be on the required icon.

If you are not sure what a particular icon does:

> move the cursor onto the icon with the mouse

> hold down the left mouse button (but do not let go)

> a line of information at the bottom left of the screen appears which tells you what that icon does

> if you want, move the cursor to another icon (still holding down the left mouse button): the text changes to show what that icon does

> if you want to select one of the icons, make sure the cursor is in that icon and let go of the left mouse button

> if you do not want to select any of the icons, move the cursor away from the icon area and then let go of the mouse button.

The icons on any particular screen give access to the more common actions available from that screen, but all the actions can be selected from the pull-down menus above the icons.

4.   Pull-down menus

These give access to the full range of actions available from that particular screen and are above the icons.

To select a pull-down menu item with the mouse, move the tip of the cursor arrow onto that word and single click with the left mouse button. Some of the items carry out that action immediately while others show a sub-menu, from which you select the required item in the same way.
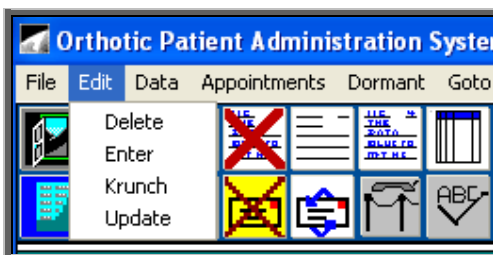
If you prefer not to use the mouse you can select options from the pull-down menu using the keyboard.

To select a pull-down menu item from the keyboard, press and release the **Alt** key: the first menu item will be highlighted.

Either press the underlined letter of the item required (e.g. E for <u>E</u>dit), or use the arrow keys to move the highlight to the item required, and then press **Enter**.

If a sub-menu appears, again use either the arrow keys to move the highlight or press the required underlined letter (e.g. U for <u>U</u>pdate).

5.   Pop-up menus

These appear when you are entering data into certain fields and make life easier by allowing you to select from a list of relevant data rather than having to type the information in. This saves time and prevents typing errors.

In some cases, the pop-up menu appears automatically as soon as you move into that field; in other cases the pop-up menu appears when you press **Tab**.

(N.B. Where pop-up menus appear automatically can be controlled by you within Utilities – Choices – Defaults – see Utilities – Note 6. Choices - Defaults)

An example is when entering the GP into a new patient's record.

Doctor	Practice	Postcode	Referenc
ANDERSON MG	LENSFIELD ROAD MED PRAC.	CB2 1EH	G0102926
ADLER S	682 FINCHLEY ROAD	NW11 7NP	G0105912
ALEXANDER PJ	10 WEST END	HU14 3PE	G0107725
ANDERSON CF	THE HEALTH CENTRE	TS18 1HU	G0108324
ASHER PN	94-96 HOLLOWAY ROAD	N7 8JG	G0108922
ARTHUR RA	153 CANNON HILL LANE	SW20 9DA	G0109325

All pop-up menus work in the same way.

You can search for the record you want in any of the columns shown (in this example Doctor, Practice, Postcode or Reference). To search in a particular column, move the green highlight into that column by using the right and left arrow keys on the keyboard or by clicking on the column with the mouse)

Then type the data you want to find. As you type, the system changes the records to being in alphabetical order by that column and zooms in to the nearest match to what you have typed.

Thus if you are searching for a particular GP by name and type 'M' the first GP with a name beginning with **M** shows:

If you now type 'AC' the first GP beginning with **MAC** shows:
If you now type 'H' the first GP beginning with **MACH** shows:

Thus the quickest way of selecting a record is to type enough to get quite close to the record required, then use **Up**, **Down**, **PgUp** and **PgDn** to move the highlight to the required record, then press **Enter** to select that one. How many letters you will have to type to get close to the required record depends on how many adjacent records there are: for instance if the GP's name begins with **X**, you are not likely to have to type any further letters to zoom in closer.

The letters typed to zoom in are case-sensitive, so if the list contains upper-case data, you must type the search letters in upper case, not lower case. If the search jumps to the last record, you have probably entered your data in the wrong case.

6.   Standard menu options

The following options appear on a number of screens and are very similar or identical in operation.

For each one, the various ways in which it can be selected are shown:

> the icon (if any)
>
> the pull-down menu (if any), showing the underlined letters
>
> the key press (if any)

Exit

File, Exit   **Esc**   or   single click anywhere on the screen with the right mouse button

This takes you back one stage e.g. to the previous menu. From the Main Menu, it allows you to quit to the Windows Desktop. In general, **Esc** will abandon what you are currently doing and take you back one stage.

Enter

Edit, Enter

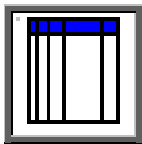This allows you to create a new record on the current screen.

Update

Edit, Update

This allows you to change the data on the current record.

Browse

Data, Browse

This changes the screen from showing the detail of one record to showing a list of records, with one line per record.
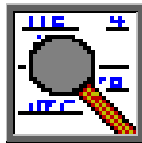

When you change into browse (list) mode, the record which you are currently looking at will show at the top of the page. To see previous records, use the up arrow or **PgUp**.

This is a toggle option so by selecting Data, Browse again you will return to seeing just one record.

```
─Patients─
                        Registered: 25/02/2000  By ROOT
  Current Care Episode Exists   Last Update: 07/06/2008  By ROOT
  Hospital No N4454544          NHS No 999-999-9999   D O B 11/11/1924  age 83
  Title        Forenames        Surname               D O D
  MR           JAMES            HERRIOT               Sex M      Ethnicity
     Address 21 James St          Mailing 21 James St
                                  Address                           DOR YAD
        Town Jamestown                   Jamestown                      YAD
      County Middlesex                   Middlesex
   Post Code JT1 2ER                     JT1 2ER             Notes:
  Home Phone 01234 567890        Mobile:                   Service 0
  Work Phone 01234 654321           Fax:                  Elements 0
       Email james.herriot@hotmail.com   GP: GIBSON PW         PCT 5M6
```
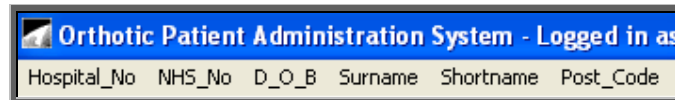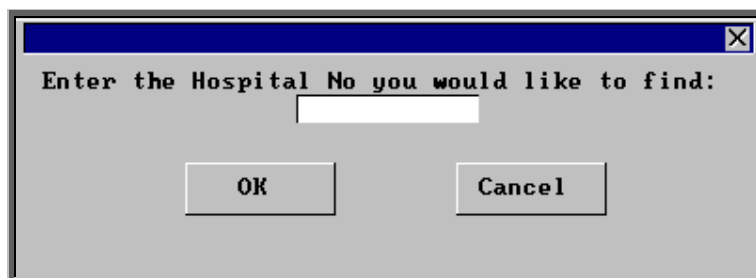
Find

Data, Find

This allows you to search for a particular record e.g. if you are in the **Patients** screen, it allows you to find a particular patient.

When you select Data, Find, a list of fields that you can search by will appear for you to select from. The fields shown depend on the screen you are using at the time (Patients, Orders etc).


```
Orthotic Patient Administration System - Logged in as
Hospital_No  NHS_No  D_O_B  Surname  Shortname  Post_Code
```

Select the field you want to search on: for instance, if you want to find a patient and you know their Hospital Number but not their Surname, you would select Hospital_No.


```
[X]
Enter the Hospital No you would like to find:
        [          ]

    [ OK ]        [ Cancel ]
```

Then type the data you want to find and select OK by clicking on the OK button with the mouse or by pressing **Enter** twice.

You do not need to type all of the data e.g. if you are finding the surname **Thistlethwaite**, you could just type 'Thistle' and the system will find the first patient with a surname beginning with **Thistle**.

Using Find also automatically sorts the records in order by the field you have chosen: for instance, if you use Find to find a particular surname, the records will then be in order by surname. You may find it useful to change into browse mode either just before or just after using Find, since it will be easy to see patients with similar surnames to the one the system has selected as being the best match; this may help you check that you have the correct patient.

If the field you want to use to find is not shown in the list (e.g. a patient's NHS Number), you can use Sequential_Search to search on any field in the database: a list is shown, from which you select the field required by moving the pointer and pressing <u>**Enter**</u>. This method, although it allows you to find using any field, is much slower than selecting the field required from the main list.

Sort
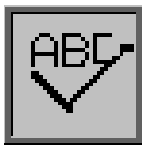
Sort

This allows you to change the order of the records shown on the screen e.g. you can put the patients in order by Surname.

When you select Sort you will be asked the field you wish to sort by. The specific fields shown depend on the screen you are using at the time (Patients, Orders etc).

Select the field you want to sort on: for instance, you may want to put the patients into order by Surname. You are then given three options.

Whole_File   puts the whole database into order: this is the option you would normally select

One_Only   allows you to select only records that match the criterion you choose: for instance, you might want to see only patients with the surname Bloggs. The difference between using this and using Find to find Bloggs is that using Find shows all the records, with the current record being the nearest match, but Sort, One_Only shows only the records selected. This is useful if, for instance, you want to send a letter to only those patients

Range   allows you to select records within a range, for instance patients with surnames from **A** to **C**. You are asked to enter the lower, then upper limit: note that if you want to find patients from **A** to **C**, i.e. including **CZERNY**, you must enter **CZZZ** as the upper limit. Entering just **C** as the upper limit will not include any patients

after **C** in the alphabetical list of patients, e.g. **CHARLES** will not be included.

Both <u>O</u>ne_Only and <u>R</u>ange show you the number of records found that match the criteria you set and isolates those matches (by placing them in an index).

```
╔═ Query Summary ═══════════════════════════════╗
║ 38035 records searched                         ║
║ 19 matches found                               ║
║ Index q:\opas\system\users\LINDA.0\one_12.idx created ║
║ ◄                                            ► ║
╚════════════════════════════════════════════════╝
```

Press **Esc** to remove the Query Summary box. Any reports or letters produced now will only include those in the index created.

<u>S</u>ort, Special_Sorts shows a list of pre-defined sort definitions for specific purposes.

This list initially includes all the sort routines available, most of which will not be relevant to the screen you are currently using: to show only the relevant ones, select <u>T</u>his_View from the options at the top of the screen.

From here, depending on any restrictions applied to your login, you may be able to edit the pre-defined sort criteria and create new sort criteria: we advise you to tread carefully and make sure you know what you are doing first!
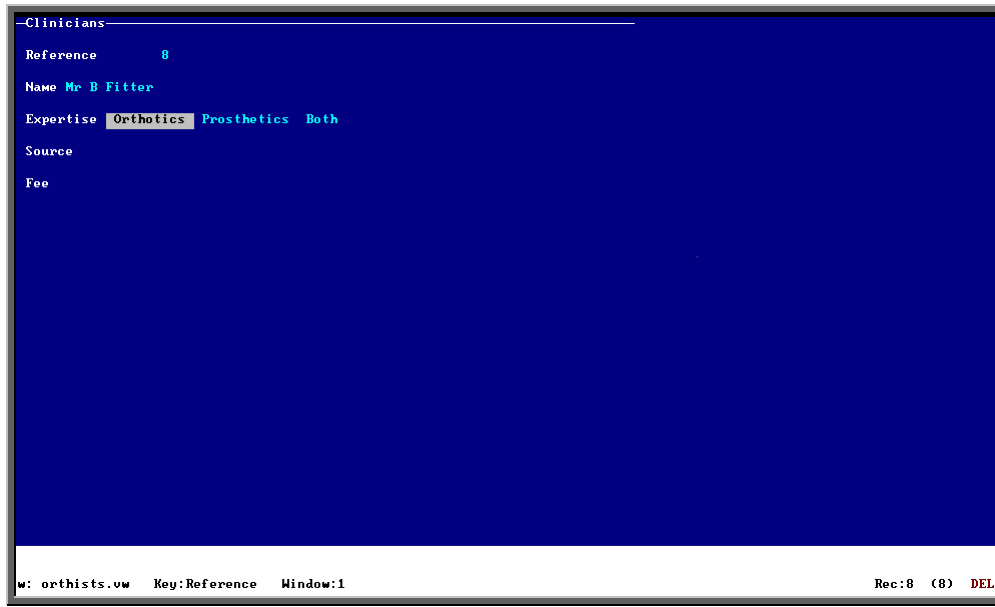
Print
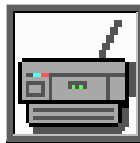
        <u>F</u>ile, <u>P</u>rint

This normally shows a box menu with the printing options available from the screen you are in.

Delete

        <u>E</u>dit, <u>D</u>elete

This normally marks the current record (patient, order etc: whatever is currently showing on the screen) to be deleted.

Deleted records remain visible until they are permanently removed by the System Administrator. The record will show that it is deleted, either by showing Del at the bottom right corner of the screen

                              or by showing a message on the screen

If you delete a record by mistake, in most cases you can simply select Delete again and this will re-activate the record.

N.B. Take care when in the Appointment screens as appointments cannot be re-activated once deleted.

7.   Standard Keys

When entering a new record or updating existing data, the following keys are standard.

F2	enters today's date
F3	moves back to the previous field
F4	moves on to the next field
F7	reformats multiple line fields to wrap correctly within the box
F8	deletes the data in the current field
Ctrl-F8	deletes the data in the current line (when in a table)
F9	inserts the same data that you entered in that field in the previous record
Ctrl-Enter	saves the current record
Esc	abandons the current record (you are asked whether to save changes if you were adding or editing data at the time)
Tab	where relevant, shows a list of choices (in a pop-up menu) from which a selection can be made. Either move the highlight with the arrow keys or, for longer lists e.g. the list of GPs, type the data needed: as you type, the system shows the nearest match.
	If more than one field is shown, you can move right or left along the columns shown to highlight the field you wish to search by. Then type the data required for that field. Press **Enter** to select the currently highlighted item.
Shift-Right Arrow	will highlight text.
Ctrl-C	will copy highlighted text.
Ctrl-X	will cut highlighted text.
Ctrl-P	will paste copied or cut text.

8.   Moving around records

When you are looking at records, the following movement icons and keys are standard.

> Moves to the next record   **F6**

> Moves to the previous record   **F5**

> Moves to the last record   **Ctrl-End**

> Moves to the first record   **Ctrl-Home**

> Page up   **PgUp**

> Page down   **PgDn**

9.   Tables

A table is a list of records within a master record: for instance a list of orders for a patient within that patient's record:

```
┌Orders────────────────────────────────────────────────────────────────┐
│Date of Or│Order No │Sup│Desc                              │Received    │
│01/10/1999│G00254   │888│COLLAR                            │01/10/1999  │
│20/07/1999│G00242   │888│COLLAR                            │20/07/1999  │
│19/07/1999│G00241   │012│SHOES                             │26/07/1999  │
│26/05/1999│G00239   │041│PIEDROS                           │08/07/1999  │
│17/05/1999│G00234   │083│SHOES                             │06/08/1999  │
│04/05/1999│G00231   │121│CALIPER                           │04/05/1999  │
└───────────────────────────────────────────────────────────────────────┘
```

Only a few records can show on the screen at one time, but there may be more. To see further records in the table, press **Alt-T** to see a list of tables available and select the required one (Orders in the above example) or click inside the table with the mouse. Then use **PgDn** and **PgUp** to scroll up and down the table.

To return to the main screen press **Alt-R**, or click anywhere on the screen (where there is not a table) with the mouse.

10.   Printing reports to screen

Most reports can be either shown on the screen or printed on the printer: if so, you will be asked to select:

Print 16 records

| Screen | Printer | File |

If you select Screen, the first page of the report is shown:

The following keys can be used:

F5 shows the previous page

F6 shows the next page

F7 reduces the magnification

F8 increases the magnification

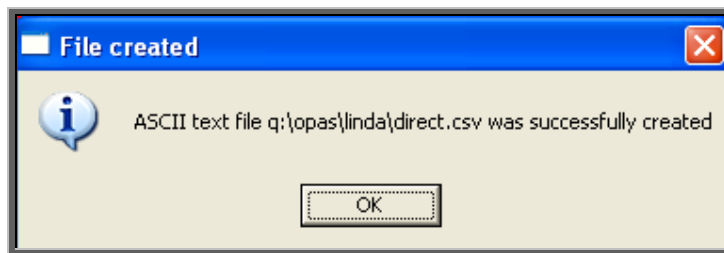Also, the cursor keys can be used
to move around the page.

When you have finished, press Esc. This will take you back to the choice of printing to screen, printer or file; so if required you could now print that report to the printer.

11.   Saving reports to file

Most reports within OPAS can be saved to a file.

If you select File, a comma separated variable file will be created.

The file will always be saved in your personal directory within OPAS (i.e. Q:\OPAS\(username)), but the file name will be different for each report.

This can now be exported into Lotus123 or MS Excel or sent as an attachment in email.

Opening a report file in MS Excel

Within MS Excel select File, Open from the menu at the top of the screen.

Use the 'up one level icon' until you can see My Computer.
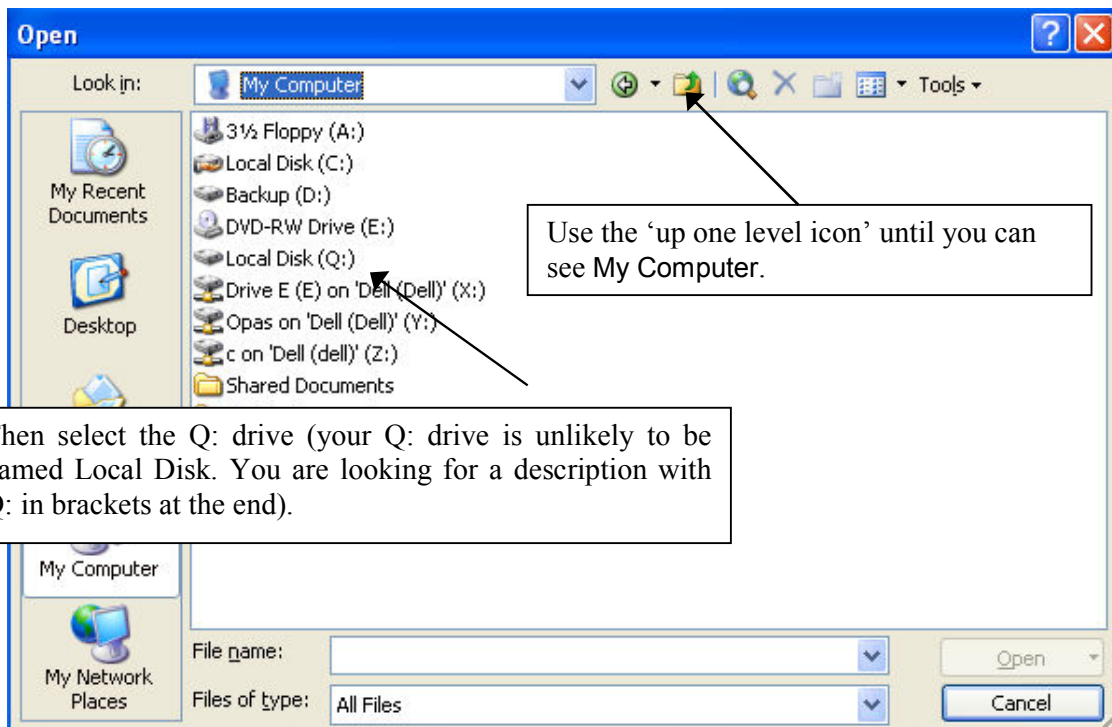
Then select the Q: drive (your Q: drive is unlikely to be named Local Disk. You are looking for a description with Q: in brackets at the end).

Then select the yellow folder called OPAS
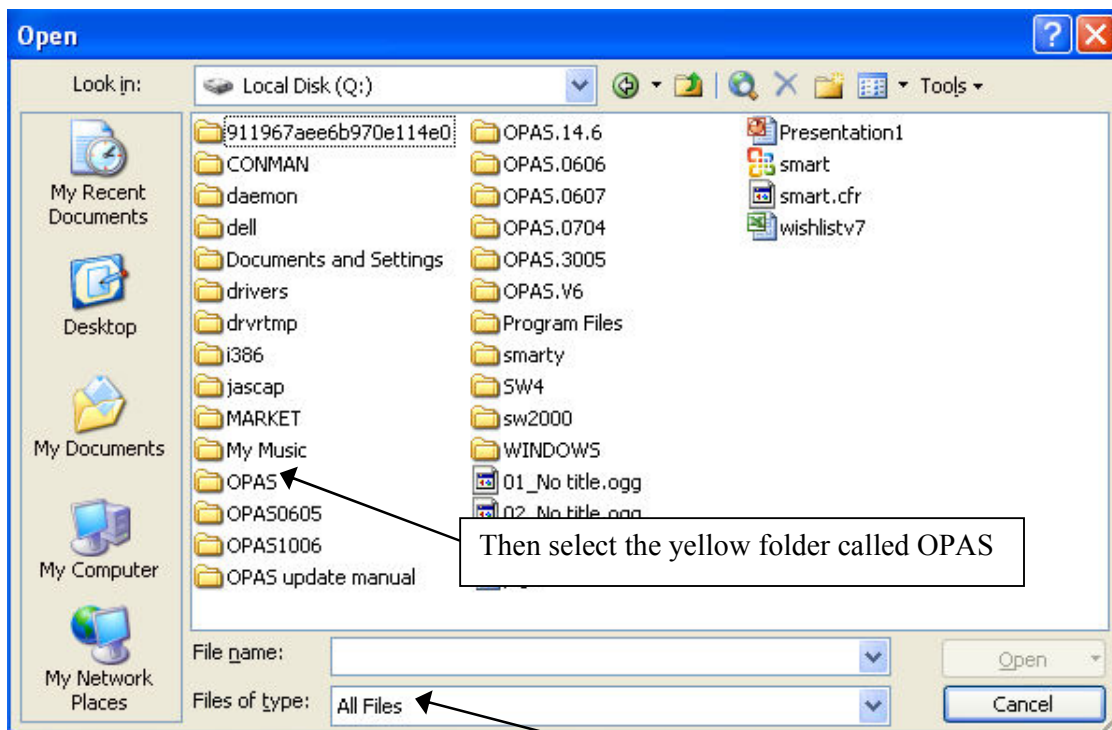
Then select your personal folder (i.e. your name). Ensure that All Files is selected, and then you will be able to see and choose the report file to be opened.

Attaching to an email

To send a report file as an attachment in email, create an email message to the person concerned and then click on 'add attachment' (you may have a big paper clip icon instead).

> Use the 'up one level icon' until you can see My Computer.

> Then select the Q: drive (your Q: drive is unlikely to be named OPAS. You are looking for a description with Q: in brackets at the end).

> Then select the yellow folder called OPAS
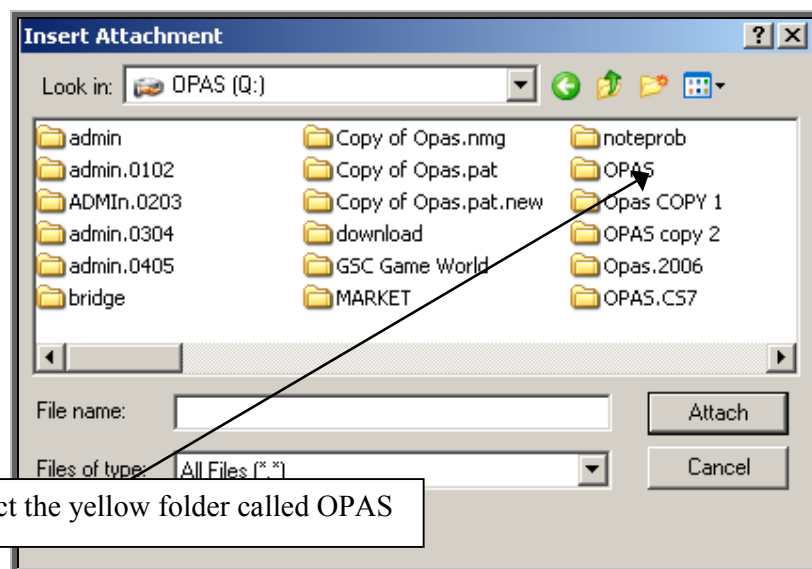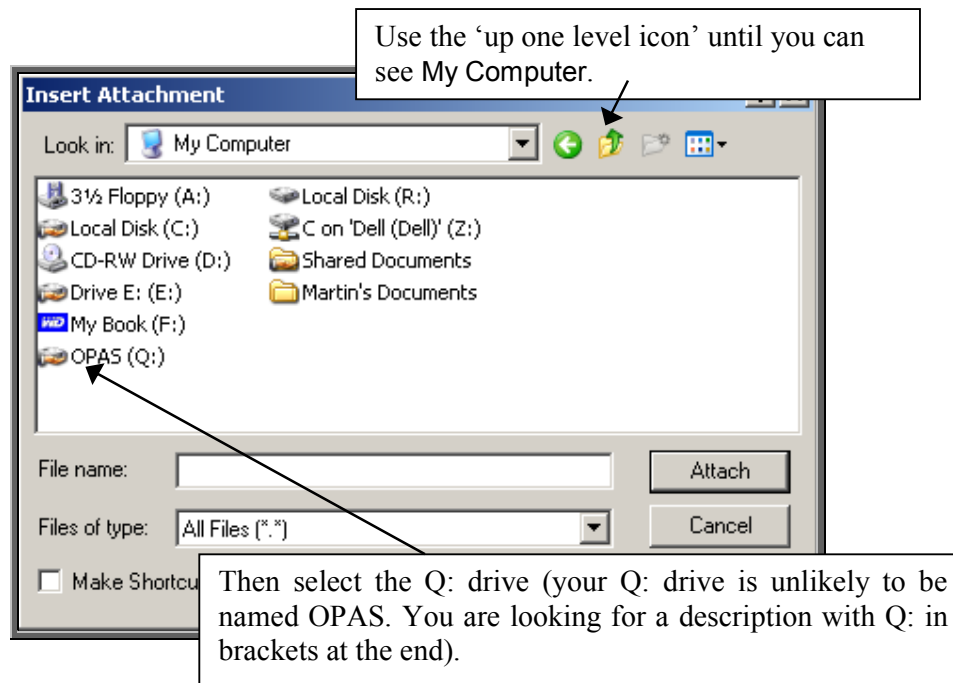
Then select your personal folder (i.e. your name). You should then be able to see the report file to attach to your email.