Online Reporting Application user manual

Version 5.0

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Audience and use

The Online Reporting Application user manual is intended for all individuals who use the Online Reporting Application (ORA), regardless of their function or employer.

Provided within this manual is the information required to use the application and navigate the screens (e.g. run reports, create accounts, report results). Within this document, the terms “inspection” and “examination” are used interchangeably, as are “trade sector” and “category of trade”. Definitions of commonly used terms and responsibilities of defined roles for inspections conducted under the authority of the Weights and Measures Act and the Weights and Measures Regulations are outlined in the Online Reporting Application Terms and Conditions of Use.

The controlled version of the Online Reporting Application (ORA) User Manual is available on the Measurement Canada website.

Printed PDF, printed HTML or downloaded copies are considered uncontrolled versions. People using a version other than from the website must regularly verify their copy against the online version.

Within this document, application page names and fields will be indicated by **high contrast white text on black background** to highlight the field or name to look for within the instruction. Related information and other documents will be listed with hyperlinks at the end of paragraphs or sections in the document. Where hyperlinks are included within a sentence or paragraph, the link leads to another section of this manual.

- Weights and Measures Act
- Weights and Measures Regulations
- Online Reporting Application terms and conditions of use
Accounts

The accounts section includes information on the terms and conditions, the prerequisites to using ORA, as well as how to create, manage and approve accounts.

Terms, conditions and termination

Users are bound by the Online Reporting Application Terms and Conditions of Use and must also always comply with Innovation, Science and Economic Development Canada’s (ISED) Terms and Conditions. Measurement Canada may at its sole and absolute discretion cancel or terminate your right to use this application or any part of the application at any time, without notice or liability to you or any other person.

- Online Reporting Application terms and conditions of use
- Innovation, Science and Economic Development Canada’s Terms and conditions

Prerequisites and training

To use ORA, you must be employed by an authorized service provider (ASP) or Measurement Canada.

Before you can create an ORA account, you must take ORA training. Refer to the ORA training registration information online for the training schedule, forms and registration policy, as well as the training session substitution, cancellation and postponement policy.

- Online Reporting Application - Training Registration
- Online Reporting Application Training Registration Policy
- Online Reporting Application Training Session Substitution, Cancellation and Postponement Policy

Training is conducted in the official language of your choice and consists of two parts.

- Part one is self-directed and you will receive a video to watch
  - You must watch the video before the second part of the training can proceed
- Part two is a web-conferencing based training session conducted by Measurement Canada
Innovation, Science and Economic Development
Canada account

You must create a departmental account in order to have login credentials that ORA will recognize. To set up your ISED account, follow these steps:

- You will be moved to the Access your account page

![Access your account](image)

- Select Create an account to expand the text box
- Select the Create an account button from within the text box
- The Create an account – step 1 of 2 window will open
- Enter your email address, as prompted
- Select Next to proceed to step 2
  - Select Cancel if you wish to abandon the account creation
- Complete all the required fields in the Create an account – step 2 of 2 window
- Select Done when ready to proceed
  - Select Cancel if you wish to abandon the account creation
- If the process worked, the next window will display “Create an account – success”
- You will also receive an email confirmation that your account is active
Online Reporting Application account

Critical – Do not share your ORA username or password.

Your username and password are unique to you. You are not to share your username or password even if you leave your organization or change roles. These are user-specific accounts and are not for generic or group use.

Your ORA account will be deactivated if you are found to be sharing your login information.

Information – Authorized service provider accounts

Each authorized service provider (ASP) must designate an ASP ORA Manager. The manager account creation must be completed before other ORA accounts at the ASP can be created.

- Enter https://www.ic.gc.ca/app/sr/mc/mgmt/login.html into your web browser’s address field
- You will be moved to the ORA login page

- Enter your ISED account username in the Username box
- Enter your ISED account password in the Password box
- Select the Login button
You will be moved to the Create an Online Reporting Application user profile – Online Reporting Application page.

The User information is already populated with the information you entered during the ISED account creation.

You will need to complete the Application access information.

For User type, choose from the drop-down list:

- User type is determined by the role you have in the organization.
- ASP users choose as follows:
  - Administrator – enters examination results in ORA on behalf of recognized technicians
  - Manager – identified by the ASP organization as the ORA manager
  - Technician – you are a recognized technician, entering only your own results
- MC users choose as follows:
  - Administrator – you are a district manager
  - Inspector – you are an inspector
  - System administrator – you are an ORA Support Desk agent
  - Read-only – you have any other role that requires access to ORA (e.g. auditor, program officer, coordinator)

Manually enter ID number.

- ASP users
  - Recognized technicians enter the technician number from the Schedule A agreement with Measurement Canada
  - Administrators and managers enter the organization number from the Schedule A agreement with Measurement Canada
- MC users
  - Inspectors – enter your inspector number
  - All other MC users – enter your employee number

Use the drop-down list to select your Language preference.

Select Submit when ready to proceed.

Select Cancel if you wish to abandon the process.

You receive a confirmation if your user profile creation is successful.

Select OK to proceed.
Information – Account approval is required

Although you will receive a confirmation that your profile has been created, you will not be able to access ORA until the ORA Support Desk approves your account.

ASP user accounts must be approved by the ASP ORA manager before the account request is sent to the ORA Support Desk.

Manage your account

Some account settings can be updated within the ORA profile (e.g. your language preference); however, if you wish to change your password, challenge question or personal information, you must do so from the ISED page.

- ISED account page

Change your password

If you wish to change your password, you can use the link at the bottom of the ORA login page screen for Forgot your username or password? The link will redirect you to the ISED Access your account page

- Select Update your account and follow the prompts
- Enter your Username
- Enter your current Password
- Select Submit
- Select Change your password
- Follow the prompts to complete the update

If you have difficulties updating your account, call 1-800-328-6189 for assistance.

Forgot your password

If you forget your password, you can use the link at the bottom of the ORA login page screen for Forgot your username or password? The link will redirect you to the
ISED Access your account page. Select the Forgot your password? link and follow the prompts.

If your account is locked (three attempts are allowed before the account is locked), call 1-800-328-6189 to reset/unlock your account.

**Forgot your username**

If you forget your username, you can use the link at the bottom of the ORA login page screen for Forgot your username or password? The link will redirect you to the ISED Access your account page. Select the Forgot your username? link and follow the prompts.

If your account is locked (three attempts are allowed before the account is locked), call 1-800-328-6189 to reset/unlock your account.

**Manage and view other users’ profiles**

The option to manage other users’ profiles in ORA is limited to the ASP Manager role in ORA. Most account changes will require contacting the ORA Support Desk for the change to take place. The ORA Manager at ASP organizations can also view the profiles of ORA users attached to the ASP.

**Approve user profiles within organization**

As the ASP ORA manager, you will be notified in the ORA Message centre of any pending account requests. It is your responsibility to ensure the ORA users in your organization have requested the user type your organization requires. Refer to the Account approval section of the manual for more information.

**Change user profiles within organization**

The ORA manager at an ASP can request that ORA accounts under their organization number be changed. To do so, the manager must email the details of the request (e.g. left organization, changing role in organization) and the name of the individual(s) to the ORA Support Desk.

- ORA Support Desk
Manager leaves organization

There must be one ORA manager per ASP. If the ORA manager leaves your organization, you must advise the ORA Support Desk or Alternative Service Delivery (ASD) Auditor immediately.

- ORA Support Desk

Recognized technician or Administrator leaves organization

The ORA profile for a recognized technician is validated against the Schedule A agreement between your organization and Measurement Canada. However, if a recognized technician or administrator advises you that they will be leaving your organization and you wish for the person’s ORA access to be removed immediately at departure or beforehand, email the ORA Support Desk with the details of the request (technician number, name, effective date).

- ORA Support Desk

View user profiles

In order to view the details of user profiles under your organization, follow these steps:

- Go to the Dashboard
- Select View user profiles
- You will be moved to the View user profiles screen
- A list of all users for your ASP will be shown
- To view additional details for an account, select the View detailed user profile icon from the Actions column
Account approval

All ORA accounts require approval by the ORA Support Desk. ASP accounts are also approved by the ASP ORA manager for the organization before being sent to the ORA Support Desk.

- ORA Support Desk

Authorized service provider accounts

The ASP Manager is responsible for the management of ORA users in their organization and must approve new ORA user accounts.

- Accounts that are created and apply to your ASP will generate an email notification
- Log in to ORA
- Select Message centre
- The default view for the Message centre should be the Notifications tab
- Select View message
- Review the information provided
- Select the Next button
- If you approve the account, select “Yes” from the Approve selection list in the Manager approval portion at the bottom of the screen
- Select the Confirm button

After you confirm, you will be redirected to a confirmation screen that notifies you that your approved user registration has been sent to the ORA Support Desk.

All Online Reporting Application accounts

The ORA Support Desk reviews new accounts before final approval to ensure the correct profile is being applied and to ensure the prerequisites (e.g. training) have been met. You will receive a confirmation when your account has been approved and is ready to be used. If your account is not approved within a couple of days, you will receive an email indicating why the account is not yet approved and indicating any follow-up needed.
Certificates, work orders and worksheets

Certificates, work orders and worksheets are grouped together because of the inherent links in the processes. Worksheets and work orders are used to generate certificates. The section is grouped in the same order as the heading: first, the transactions associated with certificates; second, the steps to complete a work order; and third, downloading and uploading worksheets.

For additional information about recording device examination results, refer to the Device Manual.

- Device Manual

Certificates

A Device Examination Certificate is issued when a work order is completed or a worksheet is uploaded to ORA. There are times when a certificate needs to be resent to an establishment or updated and reissued because of an error (e.g. the wrong email address for the establishment was entered).

Resend a certificate to an establishment

From the Message centre:

- Select the View message icon
- Select View a copy of the Device Examination Certificate
- You will be moved to the Device Examination Certificate screen
- Select Resend certificate at the bottom of the screen
- You will be moved to the Resend Device Examination Certificate screen
- Review and update the Details of establishment’s contact person, as needed
- When any changes are complete, select Resend certificate
- You will receive a confirmation that the certificate has been resent
From the **View establishment profile** window:

- Select the **Certificates** tab
- Select the **View** icon in the row of the required certificate
- You will be moved to the certificate details
- At the bottom of the screen, select the **Resend certificate** button
- You will be moved to the **Resend Device Examination Certificate** screen
- Review and update the **Details of establishment’s contact person**, as needed
- When any changes are complete, select **Resend certificate**
- You will receive a confirmation that the certificate has been resent
Update, change or reissue a certificate

You can update or change a certificate for up to a year.

Warning – You cannot change the examination date yourself.

If the update you need to make is to the examination date, follow these steps:

- Reopen the work order
- Save the work order
- Email the ORA Support Desk with the correct date of examination.
- The ORA Support Desk will confirm by return email when updated
- Use View open work orders to update the work order
- Complete any other required updates to the examination data
- Resubmit the work order

ORA Support Desk

Take into consideration the following points before updating examination results:

- Does this update change the overall result of the examination?
- Does this update change the NEDD?
- Does this update change the serial number of a device?

Rather than updating the certificate, it may be appropriate to re-examine the device. For additional information about recording device examination results, refer to the Device Manual.

- Device Manual

Complete the changes or updates and reissue the certificate

You can access a certificate to make changes to it through the Message centre or the establishment profile.

Information – Device examination certificates are only reissued when changes made in an update affect data displayed on the certificate.
Changes not affecting fields on the certificate will be saved but do not result in a new certificate.

Information – Reissued certificate numbers

A reissued Device Examination Certificate will contain a reissue number added to the end of the original certificate number. For example: 10038318 will become 10038318-1.

From the Message centre:

- Select the View message icon for the appropriate message
- To view a copy of the certificate, select the “View a copy of the Device Examination Certificate” hyperlink at the bottom of the Device Examination Certificate screen
- You will be moved to the Device Examination Certificate screen
- Select Update at the bottom of the screen

- You will be moved to the Confirmation of update screen where you must check the “I agree that by updating this Device Examination Certificate for this establishment, the completed work order will also be updated.” box.
  - If you do not agree, select Cancel
  - If you agree, select Next
- If you selected Next, you will be moved to step 1 of the work order process
- Navigate through the five work order steps and correct the errors (refer to the step-by-step instructions for work orders, as needed)
- To complete the update and reissue the certificate you must:
  - complete all the phases of the work order
  - agree to the Online Reporting Application Terms and Conditions of Use
  - submit the updated work order; otherwise, the reopened work order will sit in the open work orders section of the application

From the View establishment profile window:

- Select the Certificates tab
- Select the View icon in the row of the required certificate
• You will be moved to the certificate details
• At the bottom of the screen, select the **Update** button
• You will be moved to the **Confirmation of update** screen where you must check the “I agree that by updating this Device Examination Certificate for this establishment, the completed work order will also be updated.” box.
  o If you do not agree, select **Cancel**
  o If you agree, select **Next**
• If you selected **Next**, you will be moved to step 1 of the work order process
• Navigate through the five work order steps and correct the errors (refer to the step-by-step instructions for work orders, as needed)
• To complete the update and reissue the certificate you must:
  o complete all the phases of the work order
  o agree to the Online Reporting Application Terms and Conditions of Use
  o submit the updated work order; otherwise, the reopened work order will sit in the open work orders section of the application

**View a certificate**

• Select the **Message centre** link that appears at the top of all windows
• You will be moved to the **Notifications** tab in the Message centre
• Find the right message in the list (you can use the filter or sort buttons, as you choose)
• Select the view message icon
• Select the **Device Examination Certificate** hyperlink underneath the notification content
• You will be moved to the **Device Examination Certificate** screen
  o This screen provides an overview of the examination
• The following actions are available to you from this screen:
  o Select the **Download Device Examination Certificate** hyperlink to download a PDF copy of the certificate
  o Select the **Return to notification** hyperlink to return to the previous screen
  o Select the **Resend certificate** button to send another copy of the certificate to the establishment
• If you chose to download the certificate, you will be moved to the **Download Device Examination Certificate: [certificate number]** window.

• The following actions are available to you from this screen:
  - Select the **Return to Device Examination Certificate: [certificate number]** to return to the previous screen.
  - Select the **Download** button to download a PDF.
  - Select the **Cancel** button to return to the previous screen.

## Work orders

The process of completing a work order includes selecting devices for examination and entering the results of the examination directly in ORA. For additional information about recording device examination results, refer to the Device Manual. In this section, you will find step-by-step instructions on how to view open work orders (i.e. work orders that are in progress and have been saved), followed by all the steps to complete a work order.

• **Device Manual**

### View open work orders

All open work orders associated with your account appear here. If you download a prefilled examination worksheet or save and exit from a work order, your work will be saved at that step in the View open work orders module of the application.

• Go to the **Dashboard**
• Select the **View open work orders** link
• You will be moved to the **Open work orders** window
• You can filter items or use the sort buttons to change the display
• Select the icons or buttons depending on which action you wish to take
  - Select **Edit work order** to continue entering data into the work order. You will be returned to the step where the work order was saved.
  - Select **Delete open work order** to delete a work order that is no longer needed.
Warning – The delete icon doesn’t appear for reopened work orders.

Work orders that are reopened cannot be deleted because there is a certificate associated with the work order.

Either complete and resubmit the work order (reissuing the certificate) or contact the ORA Support Desk for the work order to be closed (reverting the data back to the issued certificate).

- ORA Support Desk

- Select the **New work order button** at the bottom if you need to start a new work order

**Step 1: Create work order**

**Information – The beginning of step 1 assumes that Search will find the establishment.**

Refer to the [Establishments](#) section of this manual if you need help adding an establishment that is not found after multiple searches.

- Go to the [Dashboard](#)
- Select [Create work order](#)
- The [Search for an establishment](#) screen will open
- Enter your search criteria in the appropriate fields
- Select [Search](#)
- The [Search results](#) window will open, displaying the matching establishments
  - If there are over 100 matching establishments, refine your search criteria
- Select the [Create work order](#) icon next to your chosen establishment

**Information - Measurement Canada users will be prompted to select a work order type.**

If you are conducting a commodities examination, you will need to refer to the Commodities Manual for the step-by-step instructions to enter commodities examination results in ORA.
• Review the Establishment details
  o Select **Update** if changes need to be made

  **Critical – Do not choose “Update” when the changes to establishment details are because of a change in ownership.**

  Updates are made to correct data such as the address and banner, and not ownership information. Refer to the *Establishments* section of this manual for more information.

  ▪ The fields will become text fields
  ▪ Make the necessary updates
  ▪ Select **Save** when complete
  ▪ Select **Cancel** if you wish to abandon the changes you have made

• The **ASP contact information** or **Measurement Canada office** information indicates what organization or office is performing the examination and is tied to your ORA profile
  o You cannot change this information in the work order
  o The information will appear on the Device Examination Certificate

• Enter the **Examination date**

• Enter the **Recognized technician ID** or **Inspector ID**
  o If your ORA profile is as an inspector or recognized technician, the field will be populated by ORA
  o If you are authorized to complete a work order on behalf of someone else, you need to enter the inspector’s or recognized technician’s number
  o Choose **Select from list** if you need to look up the number

• ORA will assign a number if the **Work order / reference number** field is left blank
  o If your organization has an internal numbering system for work assignments, you can enter the number in this field

• Choose the button or link at the bottom of the page, depending on what action you wish to take
  o Select **Previous** to return to the last screen
  o Select **Next** to move to the next step of the work order process
Select **Save and exit** if you want to save the data entered so far and return to the **Dashboard**
  - To access this work order again later, go to the dashboard and select **View open work orders**
Select **Cancel** if you wish to abandon the data entered so far

**Step 2: Prepare work order**

In this step, you will build your examination list to reflect the devices you are inspecting. Refer to the **Devices** section of this manual if you need additional information about each function mentioned below.

- Select the **Add new device** button above the **Legend** if you need to add a device that is not already listed at the establishment

  **Information – The devices displayed depend on your scope and employer**

  - ASP administrators, managers and recognized technicians: only the devices within the scope of the technician specified for the examination will be listed.
  - Measurement Canada: all of the active devices for the establishment will be listed.

- Select checkbox(es) in the **Select** column for the serial numbers of devices that you wish to use
  - Select the **Update device** icon if you need to review or make changes to the device details
  - Select the **Deactivate device** icon if the device is no longer used in trade at the establishment
  - Select the **Deactivate all** hyperlink if the selected devices are all to be deactivated
  - Select the **Reactivate all** link if the selected devices are all to be reactivated
- After any required changes to device(s) are made, select checkbox(es) in the **Select** column for the serial numbers of the devices that will be included in the examination
• Choose the button or link at the bottom of the page, depending on what action you wish to take
  o Select Previous to return to the last screen
  o Select Next to move to the next step of the work order process
  o Select Save and exit if you want to save the data entered so far and return to the Dashboard
    ▪ To access this work order again later, go to the dashboard and select View open work orders
  o Select Cancel if you wish to abandon the data entered in this step

Step 3: Validate work order

In this step, the devices you have selected for examination are listed, as are devices that are being deactivated.
  • To make changes to a device listed at this stage, select the Update device icon
  • Review the list
  • Reconfirm the Examination date in the date of examination section
  • Choose the button or link at the bottom of the page, depending on what action you wish to take
    o Select Previous to return to the last screen
    o Select Next to move to the next step of the work order process
    o Select Save and exit if you want to save the data and return to the dashboard
      ▪ To access this work order again later, go to the dashboard and select View open work orders
    o Select Cancel if you wish to abandon the data entered in this step

Information – Missing information warning

Data validation done in the background while you navigate the screens can cause a “missing information” error to appear at this stage. The details of what is missing are listed in the warning. Refer to the devices section of this manual for information about updating devices.
Step 4: Report examination results

At this stage, enter the examination results for each device in the examination list. If you need to make changes to previously selected or updated information, return to those steps of the work order.

The device currently selected for results reporting is indicated by the arrow next to it on the left side of the screen. Alternatively, you can confirm the serial number in the Device information part of the screen on the right. To change which serial number you will enter results for, select the hyperlink for the device serial number within the Examination list.

**Information – View information on P4 and F4 examination types**

Measurement Canada users can view the standard type of information used by recognized technicians when entering a product audit (P4) or follow-up (F4) examination.

- Enter the Examination type
- Enter the Recognized technician ID
  - If the technician is inactive, you must type in the ID number
- ORA looks up the ID and the device selected and validates if the technician has entered these examination parameters.
- ORA looks up the standard type and displays the information on the screen at step 4.

You must complete the Device examination results and Confirm examination results for each device in the Examination list. If you have multiple devices in the examination list that have the same information, you can choose Confirm examination results and clone. When you choose this option, the next device in the Examination list is displayed with all the same information as the previous device, but the Result field must be completed manually for each device.
Use the drop-down lists for each field to select the details and results that apply for each device.

The fields that appear depend on the profile of the recognized technician or inspector that conducted the examination. Mandatory fields, regardless of user type, are indicated by a red asterisk. For more information concerning examination results fields, refer to the Device Manual.

- **Device Manual**

**Information – Comments field**

Use the Comments field to enter information pertaining to individual devices. The Device Examination Certificate will show the comments with a line number that matches the device serial number.

Comments applicable to the overall examination are entered in step 5 of the work order process.

When you have entered the examination results for all devices, a confirmation message that you are finished will be displayed.

- If you need to change examination information for a device, you can choose the device serial number from the **Examination list** on the left

- Choose the button or link at the bottom of the page, depending on what action you wish to take
  - Select **Previous** to return to the last screen
  - Select **Next** to move to the next step of the work order process
  - Select **Save and exit** if you want to save the data and return to the dashboard
    - To access this work order again later, go to the dashboard and select **View open work orders**
  - Select **Cancel** if you wish to abandon the data entered in this step

**Step 5: Confirm and submit work order**

The last stage of the work order process gives you a final opportunity to update the results you have entered and update the contact information for the certificate delivery.
If you need to make changes to previously selected or updated information, return to those steps of the work order.

- Select the **Update examination results** icon to make modifications to the examination results of the devices listed
- Use the drop-down menu to select email or fax to complete the **Certificate delivery method**

**Information – Certificate delivery**

If the establishment does not wish to provide an email address or fax number, the ORA Support Desk will mail the certificate to the establishment. To use this option, select “email” as the option and enter the email address **IC.ORA-adel.IC@Canada.ca**.

- If two certificate recipients are needed, select the **Add another email address** link to the right of the **Email** field
  - A second email address box will appear
  - Enter the email address

**Information – Sending a certificate to two email addresses**

Used when more than one copy of the certificate needs to be sent. For example, send a copy to your ASP ORA manager or if the establishment wants two people to receive the certificate.

Entering a second email address is specific to the certificate and is not stored as part of the establishment profile.
• Complete the **Language preference** field

**Warning – You will have to update and reissue the certificate if you choose the wrong language.**

Double-check your entry to avoid having to go back and reissue the certificate later.

- Enter comments pertaining to all devices in the **Overall examination comments** field
- Anything entered in this field appears on the Device Examination Certificate

**Critical – Establishment number and Recognized technician ID / Inspector ID cannot be changed once a work order is submitted.**

If you realize at this stage that the recognized technician ID / Inspector ID or examination date are incorrect, use the Previous button to return to prior steps and update the information. If you issue a certificate with the wrong technician number, you will have to contact the ORA Support Desk to have the certificate changed.

If the establishment number is incorrect, select the Cancel button, select View open work orders from the Dashboard and delete the incorrect work order. If you issue a certificate to the wrong establishment, you must contact the ORA Support Desk to have the certificate deleted.

- **ORA Support Desk**
Information – Preview feature

After completing the section for the Details of establishment contact person, use the **Preview Device Examination Certificate** feature to see what the certificate will look like with the current data. The feature is shown as a hyperlink to the right above the Date of examination section.

When prompted, choose “Open” or “Save” (using “Open” is recommended).

The certificate is shown with “Preview mode” in the upper right and with a “test” watermark over the establishment information to show that the certificate has not been completed and submitted.

- Choose the button or link at the bottom of the page, depending on what action you wish to take
  - Select **Previous** to return to the last screen
  - Select **Next** to move to the next step of the work order process
  - Select **Save and exit** if you want to save the data entered so far and return to the **Dashboard**
    - To access this work order again later, go to the dashboard and select **View open work orders**
  - Select **Cancel** if you wish to abandon the data entered in this step
- To complete a work order, you must acknowledge and agree to the [Online Reporting Application terms and conditions of use](#)
- Select the **Submit** button to submit the completed Device Examination Worksheet to Measurement Canada
- A confirmation message will appear on the next page
- Select **OK** to return to the dashboard
Worksheets

Worksheets are available for when it’s necessary to enter examination data in a paper form. The worksheet options within ORA are to download prefilled or blank worksheets and to upload completed worksheets.

Download prefilled worksheet

In order to use this option, you must have already started a work order. The option to download a prefilled examination worksheet is shown at Step 1: Create work order and Step 3: Validate work order.

Information – Worksheets that are downloaded can be viewed later in the open work orders window.

Download a worksheet with only the establishment information

Information – It’s better to download with establishment and device information

To get the most use out of the worksheet, it’s recommended that you proceed to step 3 of the work order process and select devices for the examination worksheet before choosing the download option. This recommendation does not apply if you are doing an initial examination.

From the Search results screen:

- Select the Create work order icon
- Enter the Recognized technician ID or Inspector ID
  - This field is prepopulated with your ID, unless your ORA profile allows you to enter results on behalf of other users
  - Tap or click in the box to show a drop-down list
  - Use the Select from list link to the right of the box to view a larger display to specify the technician
- Select the Download Device Examination Worksheet link
- From the next window that opens, select from the options available
Select the **Download** button if you wish to proceed

Choose the **Open**, **Save** or **Cancel** button

- If you choose **Open**, a PDF will open
  - The PDF will display the establishment information and technician number
- If you choose **Save**, you will be prompted to **Open**, **Open folder** or **View downloads**. Select the option you want
- If you choose **Cancel**, the box will close

Select the **Cancel** button to return to the previous screen

**Download a worksheet with establishment and device information**

From the **Search results** screen:

- Select the Create work order icon
- Complete the **Examination date** field
- Enter the **Recognized technician ID**
  - Tap or click in the box to show a drop-down list
  - Use the **Select from list link** to the right of the box to view a larger display to specify the technician
- Select the **Next** button
- Complete **Step 2: Prepare work order**
  - Refer to the work orders step 2 section of this manual if you need assistance completing step 2 and selecting devices for the examination
- Select **Next** to move to the next step of the work order process
- Select the **Download Device Examination Worksheet** link
- From the next window that opens, select from the options available
  - Select the **Download** button if you wish to proceed
  - Choose the **Open**, **Save** or **Cancel** button
    - If you choose **Open**, a PDF will open
      - The PDF will display the information entered up to this step
    - If you choose **Save**, you will be prompted to **Open**, **Open folder** or **View downloads**. Select the option you want
• If you choose **Cancel**, the box will close
  o Select the **Cancel** button to return to the previous screen

While you can download prefilled worksheets that include partial examination information, you cannot upload completed worksheets if you downloaded a blank worksheet. Refer to the individual sections mentioned for more information.

- From the **Dashboard**, select the **Create work order** link
- You will be directed to the **Search** for an establishment screen
- Enter your search criteria and select the **Search** icon
  o The search results screen displays establishments that meet the search criteria
  New establishments or establishments not found using search need to be added.

**Download blank Device Examination Worksheet**

The blank worksheet is available for download to allow examination results to be manually recorded.

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**Warning – You will still have to complete the full work order process when you choose to download a blank worksheet.**

You can only upload a completed worksheet when you have used the option to download a prefilled worksheet.

- Go to the **Dashboard**
- Select the **Download blank Device Examination Worksheet** link
- If you wish to, enter the **Recognized technician ID** or **Inspector ID**
  o This field is prepopulated with your ID, unless your ORA profile allows you to enter results on behalf of other users
  o Tap or click in the box to show a drop-down list
  o Use the **Select from list** link to the right of the box to view a larger display to specify the technician
- If you specified the Recognized technician ID or Inspector ID, the person’s name and number will be displayed
- Select **Download** if you wish to proceed
  o Choose the **Open**, **Save** or **Cancel** button
• If you choose **Open**, a PDF will open
• If you choose **Save**, you will be prompted to **Open**, **Open folder** or **View downloads**.
  • Select the option you want
• If you choose **Cancel**, the box will close
  • Select **Cancel** if you no longer wish to proceed
    o You will be returned to the Dashboard if you choose Cancel

**Upload completed worksheet**

⚠️ **Warning** – You can only upload a completed worksheet if you downloaded a prefilled worksheet at step 1 or step 3 of the work order process.

From the **Dashboard**:

• Select the **Upload completed worksheet** link
• Select the **Browse**... button
• Navigate to the file from the window that opens
• Double-click on the file or select the Open button
• Ensure the filename you chose shows in the **File** text box
• Select the **Upload** button
  o Select the **Cancel** button if you wish to abandon the upload

**Information – Types of worksheet errors**

There are two types of worksheet errors:
1. Errors that prevent the worksheet from being loaded
2. Errors that must be fixed before submitting the work order

When an error is flagged, part of the notice will include information about what is missing or incorrect. Fix the errors to proceed.

• When your worksheet loads with an error, you will be shown the error messages
  o Select **Next** to move to the work order process
  o Select **Cancel** to return to the Dashboard
If you choose Cancel, the uploaded work order will be saved in the open work orders.

- When your worksheet uploads and there are no errors, you will receive a confirmation that the worksheet uploaded successfully into a work order.
- Choose the option you wish to use:
  - Select the **Next** button to move to step 5 of the work order process.
    - If you need assistance with the remainder of the process, refer to the work orders section of this manual.
  - Select **Cancel** to return to the dashboard.
    - If you choose Cancel, the uploaded work order will be saved in the open work orders.

## Devices

The following actions can be taken on devices. Unless stated otherwise, the actions must be completed as part of a work order.

- add a device
- cancel a device transfer
- deactivate a device
  - it is possible to deactivate a device without completing a work order
- delete a device
- reactivate a device
- transfer a device between establishments
  - transfers are completed outside of a work order
- view a device transfer history
- update a device

### Information – Changing device information

When changes are made to a device, the device information in ORA will populate the fields **Date of last update** and **Last updated by**.

- **Date of last update** = the calendar date of the change.
- **Last updated by** = the user making the change.
Add a device

You may add a device from step 2 of the work order using the Add new device button above the Legend.

After selecting the **Add new device** button:

- Enter the **serial number** of the device
- Choose the option you wish to use
  - Select **Cancel** to return to step 2 of the work order
  - Select **Next** to finish adding a new device
    - If the serial number you entered is similar to a device that is already present at the establishment (whether active or inactive), you will be prompted to review the similar device listings
    - If the serial number is listed, select the **Update device** icon to review the device details
- The **Serial number** field will show the serial number you entered on the previous screen
  - If you notice an error, update the number
- Complete the **Approval number**
  - Mandatory field
  - Consists of a prefix plus four numeric digits (e.g. AM-1111)
  - Consult the Notice of Approval database to search for approval numbers
  - More complex devices will have a secondary approval number
- Complete the **Secondary serial number**, if applicable
- Complete the **Secondary approval number**, if applicable
- Complete the **Device type**
  - Mandatory field
- Complete the **Trade sub-sector code**
  - Mandatory field
- Complete the **Capacity**
  - Mandatory field
- Complete the **Unit** field
  - The **Unit** that applies to **Capacity** is a mandatory field
• Complete the **Interval**
  o Mandatory field for mass devices
  o If you specify an interval, complete the **Unit** field next to **Interval**
• Add any **Device notes**
• Select the option you need to proceed
  o Select **Add and clone** to add another new device with the same parameters
    (you will only need to add the new serial number)
  o Select **Add** to complete the addition and return to step 2 of the work order
  o Select **Add component** if the device has a separate component
    ▪ Add the **Serial number** of the component
    ▪ Add the **Approval number** of the component
    ▪ Add a description of the component, if needed

• [Notice of Approval database](#)

**Cancel a device transfer**

If you need a device transfer cancelled, contact the ORA Support Desk by email. Include the details of the device transfer (serial number, sending establishment, receiving establishment) or a copy of the Device Transfer Notice in the email. When the cancellation is complete, you will get a confirmation by return email.

• [ORA Support Desk](#)

**Deactivate a device**

It is necessary to deactivate devices that are no longer in use. If there are duplicates of the same device at an establishment, deactivate duplicates until there is one active device with the correct serial number (including any secondary serial numbers) to ensure that all new examinations are captured in the correct device history. Sometimes duplicate devices are created because of data entry errors and the incorrect/inaccurate device needs to be deactivated.

You can only deactivate devices that have been previously examined. If you add a device and realize it’s a duplicate but have not issued a certificate yet, refer to the steps to delete a device.
To deactivate one device

- From the **View establishment profile** window
- Ensure the **Active devices** tab is selected
- Find the correct serial number in the list
- Select the **Deactivate device** icon
- The device will be deactivated and moved to the **Inactive devices** tab

To deactivate multiple devices

- From the **View establishment profile** window:
  - ensure the Active devices tab is selected
  - select the devices by activating the checkboxes in the Select column
  - select the Deactivate selected button at the bottom of the page
- The devices will be deactivated and moved to the **Inactive devices** tab

To deactivate devices while completing a work order

- From **Step 2: Prepare work order**
- Devices must be deactivated one at a time
- Select the **Deactivate device** icon next to each device you wish to deactivate
- When your Examination list is complete, select Next to proceed to step 3
- The devices selected for deactivation will be shown in the Deactivated devices portion of the screen
- Devices will only be deactivated when the work order is completed and submitted
Delete a device

The option to delete a device is only present for devices that have just been added to ORA. You cannot delete a device that has any certificate results associated with the device (devices that have been examined and a certificate issued are deactivated, not deleted).

If you added a device and realize it was a mistake and the device should not have been added, you can only take these actions from **Step 2: Prepare work order**:

- The device you added is shown in the device list
- There is a star icon near the serial number, designating a new device
- Select the **Delete device** icon
- You will be moved to a window to confirm your request
  - Select the **Delete** button if you want to delete the device
  - Select the **Cancel** button to abandon the deletion and return to the previous screen
- If you selected Delete, you will be moved to a confirmation screen
- Select the button **Return to Step 2: Prepare work order**

Reactivate a device

Inactive devices do not appear in the list of devices to be examined. In order to reactivate a device, you must be at **Step 2: Prepare work order** of the work order process.

- Select the **Add new device** button
- Enter the **Serial number**
- You will receive a warning message that the device may already exist
- Select the **Update device** icon to reactivate the device
- If information is missing, you will have to fill in the necessary device information fields to complete the reactivation (mandatory fields are indicated with a red asterisk)
- Update the Device status by using the drop-down list
- Select the option at the bottom of the screen for the action you wish to take
  - Select the **Save** button to complete the reactivation
Select the **Save and clone** button to add a second device with the same specifications.

**Information – Try to avoid using save and clone when reactivating devices.**

Although the feature is there, it’s recommended to reactivate devices and add devices separately. Cloning a reactivated device as part of the same transaction is not recommended.

Select the **Cancel** link to abandon the reactivation and return to step 2.

The device will now appear under the list of active devices and is selected for examination. Refer to the Device Manual for more information about devices. Refer to the work orders section of this manual if you need assistance completing the work order.

- [Device Manual](#)
- [Work orders](#)

**Transfer a device**

When a device moves from one establishment to another, you can update the device location by completing a device transfer. The document that is generated is a Device Transfer Notice.

**Information – Transferring device(s) back and forth between establishments.**

Until October 6, 2016, ORA would not allow a device to be transferred from establishment A to establishment B and back to establishment A. Before then, you had to reactivate the device at establishment A. Now you can transfer the device from establishment B back to establishment A, if needed. Devices previously transferred out of an establishment will be listed in the inactive devices tab. Devices transferred in will be shown in the active devices tab with the transferred in icon next to the serial number.

- Go to the **Dashboard**
Select the **Transfer devices** hyperlink.

You will be moved to **Step 1: Search for receiving establishment**.

If you know it, enter the **Establishment ID**.

- Select the **Search** button.

If you do not know the **Establishment ID**, select the **More search criteria** hyperlink.

- Enter the search parameters.
- Select the **Search** button.

You will be shown the list **Search results** for establishments that match your search criteria.

Select the **View establishment details** icon, if needed, to confirm if the establishment is the correct receiving establishment.

If you find the receiving establishment in the list, activate the radio button in the **Select** column to choose the establishment.

- Select **Next** to continue.
- Select **Cancel** to return to the dashboard.

If the receiving establishment is not in the list, select **Is the establishment you are looking for not listed?** for information about why the establishment is not listed.

- Only open establishments are listed in search results.
- To refine your search criteria and try again, select the **More search criteria** hyperlink and update the search parameters.

Select the **Search** button when ready to try again.

After selecting a receiving establishment, you will be moved to **Step 2: Search for devices**.

- The default view is to **Search by establishment**.
- You can also choose the tab **Search by serial/approval number**.

If you chose **Search by establishment**

- Enter the **Establishment ID**, or
- Select the **More search criteria** hyperlink.
• Enter the search criteria
• Select the **Search** button
• The **Search results** will be displayed
  • If the sending establishment is not in the list, select **Is the establishment you are looking for not listed?** for information about why the establishment is not listed
• If you find the sending establishment in the list, activate the radio button in the **Select** column to choose the establishment
  • Select **Previous** to return to step 1
  • Select **Next** to continue
  • Select **Cancel** to return to the dashboard
• If you chose **Search by serial/approval number**
  • Enter the **Serial number** of the device being transferred
  • You may enter the **Approval number**, if you choose
  • Choose the option, depending on what action you wish to take
    • Select the **Add another serial/approval number** link if you wish to transfer additional device(s)
    • Select the **Search** button to continue
• After completing step 2, you will be moved to **Step 3: Select devices**
• Select the device(s) to be transferred by activating the checkbox(es) in the **Select** column

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**Information – Transferring devices considered non-compliant.**

A blue triangle, indicating a device that is not in a compliant state will be next device serial numbers that the non-compliant status applies to.

You can transfer non-compliant devices; the local Measurement Canada district office receives a notification of the transfer.

• Choose the option at the bottom of the screen for the action you wish to take
o Select the Previous button to return to step 2
o Select the Next button to continue
o Select the Cancel hyperlink to abandon the transfer and return to the dashboard

- After selecting the devices, you will be moved to Step 4: Confirm transfer
- You will see a warning message at the top of the screen reminding you that the trade sector of each device must be reviewed and corrected, if needed, before completing the transfer
- Complete the Receiving establishment contact details section (mandatory fields are indicated with a red asterisk next to the field name)
- Complete the Sending establishment contact details
- Review the Transferred devices information
- Use the Update trade sector icon in the Trade sub-sector field to make any changes to the trade sector before completing the transfer
  o If you prefer, select the View icon from the Action column
  o You will be moved to the View device information screen
  o To update device information (including trade sector) from this view, select the Update icon

Information – Transferring devices and trade sector information

A trade sub-sector must be identified. Verify the trade sub-sector before completing a transfer.

Changes to trade sectors affect a device’s NEDD.

- Activate the checkbox next to the mandatory acknowledgement that you confirm the information in step 4 is correct
- Choose the option at the bottom of the screen for the action you wish to take
  o Select the Previous button to return to the previous step
  o Select the Complete the transfer button to continue
  o Select the Cancel hyperlink to return to the dashboard
• If you selected **Complete the transfer**, you will be moved to a confirmation screen that includes a summary of the transfer
• Select the **OK** button

When you complete a device transfer, you can access the **Device Transfer Notice** in your **Message centre** or by looking up either the sending or receiving establishment. If you search by establishment and then select **View establishment profile**, select the **Notices** tab and you can select the **View** icon to review the notice.

**View a device transfer history**

In order to view the transfer history of a device, you must go to the **View establishment details** window for the establishment that has the device you wish to review.

From the establishment details screen:
• Select **View device** icon from the **Actions** column
• You will be moved to the details screen, which includes the transfer history at the bottom of the window

**Update a device**

You can only update the details of a device from within a work order. You have the choice to make changes to device information fields by selecting the **Update device** icon, and you can make some changes to the status of a device from the **Step 2: Prepare work order** screen.

**Update the status of one device**

If you need to update only the device status, the options will be indicated in the Actions column, next to the **Update device** icon.
• Select the **Deactivate device** icon if you wish to deactivate a device
• Select the **Reactivate device** icon if you wish to reactivate a device
• Select the **Delete device** icon if you wish to delete a device
• A star next to a device serial number indicates a **New device** (this information cannot be edited)
• A warning icon (an exclamation point inside a triangle) next to a device serial number indicates that the device is **Not in a compliant state** (this information cannot be edited)

**Update the status of multiple devices at once**

To make multiple devices active or inactive in one transaction, activate the checkboxes next to the serial numbers of the devices you wish to update and then select either the **Deactivate all** or **Reactivate all** hyperlink underneath the device list.

**Update the information fields of a device**

• Select the **Update device** icon for the device serial number you wish to make updates to
• You will be moved to a window that displays the **Device information** fields (mandatory fields are indicated with a red asterisk)

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**Information – Missing information for older devices**

Some older devices may be missing mandatory information. The fields that are now required information may not have been mandatory at the time the device was entered or last examined. To complete the update, you must ensure all required information is completed.
• Update the **Serial number**, if needed

**Warning – Be cautious making updates to serial numbers.**

Only corrections are allowed, not a complete change. An inaccurate or incorrect serial number can be updated (e.g. 1T7 is displayed but the device shows 1Y7, or a B is entered and it should be an 8).

Refer to the Field inspection manuals to review the rules for types of devices.

- [Field Inspection Manual – Automatic Weighing Devices](#)
- [Field Inspection Manual – Dimensional Measuring Devices](#)
- [Field Inspection Manual – Inspection Preparation](#)
- [Field Inspection Manual – Non Automatic Weighing Devices](#)
- [Field Inspection Manual – Volumetric Measuring Devices](#)

• Update the **Approval number**, if needed
• Enter or update the **Secondary serial number**, as needed
• Enter or update the **Secondary approval number**, as needed
• Ensure the **Device type** is correct
• Ensure the **Trade sub-sector** code is correct
• Enter or update the **Capacity**, as needed
• Update the **Unit** field for **Capacity**, as needed
• Enter or update the **Interval** field, as needed (this field is mandatory for mass devices)
• Update the **Unit** field for **Interval**, as needed
• Add or update **Device notes** that may be needed
• Change the **Device status**, as needed
• Choose the option at the bottom of the screen for the action you wish to take
o Select the **Action** that you may need to take for any **Components** listed (use the legend above the Component section)
o Select the **Add component** button if you need to add a component for the device
o Select the **Save** button to save the changes and return to step 2
o Select the **Save and clone** button to save the changes and add a second device with the same parameters
o Select the **Cancel** button to return to step 2

**Establishments**

In this section, you will find information about the different transactions that can be made with establishments in ORA.

ORA users can take the following actions when working with establishments:
- Add an establishment profile
- Change the legal name of an establishment
- Request an establishment merger
- Request an establishment closure
- Update establishment details

In each subsection below are the particulars of how and when to use each type of action. Refer to the Device Manual for additional information about establishments.

- **Device Manual**
Add establishment profile

A new establishment is added to ORA when you have used the search function to determine that the establishment is not already in the database.

When you add a new establishment, you can issue a certificate to that establishment once you receive the confirmation that the addition has been sent to Measurement Canada for review.

Warning – Always try searching for an establishment before adding it.

Only add an establishment if a comprehensive search confirms the establishment is not already in ORA. Refer to the search section of this manual for tips on conducting searches of the information in the system.

Add an establishment after using search

- Go to the Dashboard
- Select the Search hyperlink
- Enter the search criteria
- Select the Search button when ready
- You will be moved to the Search results window
- If the establishment you need is not listed, select the Add establishment profile hyperlink above the legend
- You will be moved to a new window
- Complete the Establishment details section
  - Enter the Legal name of the establishment (mandatory field)
  - Enter the Operating name of the establishment

Warning – If the legal name is a numbered company, you must enter an operating name.
• Enter the **Banner** (mandatory field)

**Information – Enter IND as the banner when:**
- the establishment does not have a banner
- the banner is not found in the list

• Enter the **Address** (mandatory field)
• Enter the **City** (mandatory field)
• Select the **Province** from the drop-down list (mandatory field)
• Enter the **Postal code** (mandatory field)
• Enter the **Telephone** number (mandatory field)
• If the establishment is a factory, activate the **Factory** checkbox

**Critical – Factory is only chosen when the establishment is the place devices are examined for sale to device owners.**

Factories are establishments that are manufacturers, sellers or resellers of trade devices, not the end users of the devices.

• Complete the **Directions** field, as needed
• Complete the **Details of establishment’s contact person** section
  - Complete the **Name** field
  - Complete the **Title** field
  - If applicable, enter the **Fax** number
  - If applicable, enter the **Email** address
• If not already indicated, enter the **Recognized technician ID** or **Inspector ID**, or use the **Select from list** hyperlink
  - This field is prepopulated with your ID, unless your ORA profile allows you to enter results on behalf of other users
• You must complete the **Provide comments to Measurement Canada** section
• Use the drop-down list to complete the **Standardized comments** (mandatory field)
o Select **New Establishment** if the addition is being done because the establishment is new

o Select **New owner of existing establishment** if the addition is a result of a change in ownership
  - If this is the reason chosen, you must also send a Request to close establishment for the previous owner’s establishment

o Select **ORA support desk requested** if you are adding this establishment because of a request from the ORA support desk to make the addition

o Select **User entered comment** if you wish to enter comments or if none of the above reasons explain why you are adding an establishment

  • If you selected **User entered comment**, you must complete the **Comments** field by entering information about why you are adding the establishment

  • Choose the option at the bottom of the screen that matches the action you wish to take
    o Select **Submit** to continue
    o Select **Cancel** to abandon the addition and return to the dashboard

  • If there are existing establishments with similar information to what you have just entered, you will be moved to a verification window
    o Review the list of similar establishments ORA generated
    o If the establishment is listed, use the toggle button in the **Select** column to choose to use that establishment
      - If you use the **Select** button and choose **Next**, you will be moved to the **View establishment profile** window and you can either:
        • Select the **Update** button in the **Establishment details** section to make changes
        • Select the **Return to Add establishment profile: Profiles found** button to return to the previous window
        • Select the **Create work order** button if you wish to proceed with a work order for this establishment
If the establishment is not listed, activate the checkbox next to the statement

*None of these establishment profiles match the establishment profile I attempted to add*

- Choose the option at the bottom of the window that matches the action you wish to take
  - Select the **Previous** button to return to the establishment information window
  - Select the **Next** button to continue
  - Select the **Cancel** hyperlink to return to the dashboard
- If you chose to continue, you will be moved to the **Confirmation** window
- Choose the option on the screen that matches the action you wish to take
  - Select the **dashboard** hyperlink to return to the **Dashboard**
  - Select the **Create work order** button if you wish to create a work order for the establishment you just added

**Add an establishment using the dashboard link**

- Go to the **Dashboard**
- Select the **Add establishment profile** link
- You will be moved to a new window
- Complete the **Establishment details** section
  - Enter the **Legal name** of the establishment (mandatory field)
    - If the Legal name is a numbered company, you must enter an operating name
  - Enter the **Operating name** of the establishment

**Warning** – If the legal name is a numbered company, you must enter an operating name.
Enter the **Banner** (mandatory field)

**Information – Enter IND as the banner when:**

- the establishment does not have a banner
- the banner is not found in the list

Enter the **Address** (mandatory field)

Enter the **City** (mandatory field)

Select the **Province** from the drop-down list (mandatory field)

Enter the **Postal code** (mandatory field)

Enter the **Telephone** number (mandatory field)

If the establishment is a factory, activate the **Factory** checkbox

**Critical – Factory is only chosen when the establishment is the place devices are examined for sale to device owners.**

Factories are establishments that are manufacturers, sellers or resellers of trade devices, not the end users of the devices.

Complete the **Directions** field, as needed

- Complete the **Details of establishment’s contact person** section
  - Complete the **Name** field
  - Complete the **Title** field
  - If applicable, enter the **Fax** number
  - If applicable, enter the **Email** address

- If not already indicated, enter the **Recognized technician ID** or **Inspector ID** in the box or use the **Select from list** hyperlink
  - This field is prepopulated with your ID, unless your ORA profile allows you to enter results on behalf of other users.

- You must complete the **Provide comments to Measurement Canada** section
- Use the drop-down list to complete the **Standardized comments** (mandatory field)
- Select **New Establishment** if the addition is being done because the establishment is new
- Select **New owner of existing establishment** if the addition is a result of a change in ownership
  - If this is the reason chosen, you must also send a Request to close establishment for the previous owner's establishment
- Select **ORA support desk requested** if you are adding this establishment because of a request from the ORA support desk to make the addition
- Select **User entered comment** if you wish to enter comments or if none of the above reasons explain why you are adding an establishment
- If you selected **User entered comment**, you must complete the **Comments** field by entering information about why you are adding the establishment
- Choose the option at the bottom of the screen that matches the action you wish to take
  - Select **Submit** to continue
  - Select **Cancel** to abandon the addition and return to the dashboard
- If you selected **Submit**, you will be moved to the **Confirmation** window
- Choose the option on the screen that matches the action you wish to take
  - Select the **dashboard** hyperlink to return to the **Dashboard**
  - Select the **Create work order** button if you wish to create a work order for the establishment you just added
Establishment legal name change

An establishment legal name change is only requested when there are errors or omissions in the way the legal name is recorded in ORA.

An establishment’s **Legal name** is only updated in the following types of situations:

- the recorded name has spelling errors
- a combination of the legal name and operating name are recorded in the legal name field
- the operating name is recorded as the legal name
- the store number is missing
- where applicable, “Ltd.” or “Inc.” is missing

**Critical – Do not update ORA establishment details to reflect ownership changes**

Do not attempt to submit an establishment legal name change in ORA if there has been a change in ownership.

A change in ownership requires that the old establishment be closed, a new establishment be added (to reflect the new owner) and any devices that are in use at the new business are transferred.

Submit a name change

- Go to the [Dashboard]
- Select the [Search] or [Create work order] hyperlink
- Enter the search criteria
- You will be moved to the [Search results] page
- For the chosen establishment, select the [Create work order] icon
- You will be moved to the **Step 1: Create work order** window
- Select the [Update] button in the [Establishment details] section of the screen
- You will be moved to a window where you can edit the establishment fields
- Make the necessary changes to the [Legal name]
- Make any other updates that are needed to the establishment fields
• If not already indicated, specify the **Recognized technician ID** in the box or use the **Select from list** hyperlink

• You must complete the **Provide comments to Measurement Canada** section

• Use the drop-down list to select from the Standardized comments (mandatory field)
  - Select **Added legal name** if the change is required because there was no legal name in the establishment details before
  - Select **Corrected legal name** if the change is to correct any errors in the legal name or to add a store number, etc.
  - Select **ORA support desk requested** if you are making this change because of a request from the ORA support desk
  - Select **User entered comment** if you wish to enter comments or if none of the above reasons explain why you are making the change

• If you selected **User entered comment**, you must complete the **Comments** field by entering information about why you are changing the legal name of the establishment

• Choose the option on the screen that matches the action you wish to take
  - Select the **Save** button to save the changes and return to the previous screen
  - Select the **Cancel** hyperlink to abandon the changes and return to the previous screen
Request to merge establishments

The option to merge establishments can be useful because there are some duplicate entries of establishments in ORA. Duplicate establishments can be created by mistake or due to errors or confusing addresses, mistyped postal codes and other reasons. Although it’s easier with ORA to find establishments than when paper certificates were issued, some establishment histories are duplicated and need to be merged when duplicates are discovered.

If you believe you have found a duplicate entry, review the establishment details to confirm. Reviewing the details of each establishment helps determine which establishment should stay as the active or open establishment.

Close any open work orders you may have before making a request to merge establishments; a merger request cannot be processed while there are open work orders for any of the establishments being proposed for merger. If the open work order was not created by you, contact the ORA Support Desk who will follow-up with the ORA user who has the open work order.

Submit a merger request

- Go to the Dashboard
- Select the Search hyperlink
- You will be moved to the Search for an establishment window
- Select search criteria that applies to all establishments to be merged
- Enter the search criteria in the appropriate fields
- Select the Search button when ready to proceed
- You will be moved to the Search results window
- Select the Request to merge establishments hyperlink (found above the legend)
- The display will change to the Select to merge window
- In the first column, called Select to merge, activate the checkboxes for the establishments you wish to merge
- Choose the option at the bottom of the page for the action you wish to take
  - Select the Request to merge establishments button to proceed
Select the **Cancel** hyperlink to return to the Search results view

You will be moved to the **Send notification** window if you chose

**Request to merge establishments**

- First, you must complete the **Establishments to be merged** portion of the screen
- Activate the toggle button in the **Select** column to identify which establishment will stay open

**Information – Choosing which establishment to keep open.**

Choose to keep the establishment open that has the most examination data.

If in doubt, contact the ORA Support Desk for guidance.

- **ORA Support Desk**

- If not already complete, identify the **Recognized technician ID** by choosing the **Select from list** hyperlink

- You must complete the **Standardized comments** in the **Provide comments to Measurement Canada** part of the screen
  - Select **Duplicate establishment** if you are submitting the merge request because you found two or more establishments that you believe is one establishment entered multiple times
  - Select **ORA support desk requested** if you are submitting this merger because of a request from the ORA support desk to do so
  - Select **User entered comment** if you wish to enter comments or if none of the above reasons explain why you are merging the establishments
Critical – Submitting merger requests without a site visit.

A site visit before submitting merger requests is recommended. However, for the times that it’s clear establishments are duplicates, and you haven’t completed a visit to the location, choose **User entered comment**. You must explain how you verified that there are duplicates that need to be merged.

For example:

- You phoned the establishment and checked ownership details.
- The name of the businesses and contact information are the same.
- There is a small difference in the establishment’s address that may have prompted the duplicate entry (e.g., the postal code is entered incorrectly or the business is at an intersection and one establishment is captured with one street address and the second is captured with the other street address).

- If you selected **User entered comment**, you must complete the **Comments** field by entering information about why you are adding the establishment
- You must activate the checkbox next to the mandatory acknowledgement that you reviewed the information and it is correct
- Choose the option at the bottom of the screen that matches the action you wish to take
  - Select **Submit** to continue
  - Select **Cancel** to return to the previous window
- If you selected Submit, you will be moved to the **Confirmation** window
- Select the **OK** button
- You will be returned to the Search results window
Request to close establishment

Establishments are closed when no longer in business or no longer operating at that location.

If an establishment moves locations within the same community but the ownership stays the same, update the establishment address details as opposed to closing the establishment.

Information – An establishment can only be closed if there are no open work orders.

Submit a closure request

- Go to the Dashboard
- Select the Search hyperlink
- You will be moved to the Search for an establishment window
- Enter the search criteria
- Select the Search button when ready to proceed
- You will be moved to the Search results window
- Select the Request to close establishment icon (in the Actions column)
- You will be moved to the Send notification window
- If not already complete, identify the Recognized technician ID by entering the box or choosing the Select from list hyperlink
- You must complete the Standardized comments in the Provide comments to Measurement Canada part of the screen
  - Select Establishment no longer exists if you are submitting the closure because the establishment is no longer open
  - Select New owner of establishment if you are submitting the closure because the ownership of the establishment has changed
    - If this is the reason, you may also need to Add establishment profile to reflect the new business and transfer any devices that are in use at the new establishment
Select **ORA support desk requested** if you are submitting this closure because of a request from the ORA support desk to do so.

Select **User entered comment** if you wish to enter comments or if none of the above reasons explain why you are closing the establishment.

### Critical – Submitting closure requests without a site visit.

It’s recommended to conduct a site visit before submitting a request to close an establishment. However, if you submit a closure without visiting the site, choose **User entered comment**.

You must include the research you conducted to determine an establishment is closed.

**Two** independent confirmations that the establishment no longer exists must be included in the notes.

Examples:

- Recent Google Street view search
- No listing in Canada411
- Banner site listings from corporate websites
- Attempted calls to establishment have a “number not in service” or “wrong number” message

- If you selected **User entered comment**, you must complete the **Comments** field by entering information about why you are adding the establishment.
- Choose the option at the bottom of the screen that matches the action you wish to take:
  - Select **Submit** to continue
  - Select **Cancel** to return to the previous window
- If you selected Submit, you will be moved to the **Confirmation** window.
- Select the **OK** button.
- You will be returned to the Search results window.
Information – Closure requests are reviewed by the ORA Support Desk.

Search results will display a note in the Actions column that the establishment is pending closure while the review is in progress.

View establishment details

The information that will be displayed in the next window includes establishment details and details of the establishment’s contact person. Tabs at the bottom of the page include information about the establishment’s active devices, inactive devices, previous examination certificates and notices. Measurement Canada inspectors are also able to view Commodity reports in the establishment details window.

Information – View examination type information for P4 and F4 examination types

Measurement Canada users can view the standard type information used by recognized technicians.

From the View establishment details window:

- Select the Certificates tab
- Select the View icon for the Certificate number applicable to the device Serial number details you want to display
- From the Examined devices list, select View in the Actions column for the device you want to display
Update establishment details

Information – Go to the Update, change or reissue a certificate section of this manual if you need to update information on a certificate you recently issued.

Information included in the establishment details or establishment profile can be updated to reflect changes. In order to update establishment details, if you have not already issued the certificate, you must complete a work order. The option to update establishment details is within Step 1: Create work order

- You will see the Establishment details as currently entered
- Select Update to make changes

Critical – Do not choose “Update” when the changes to establishment details are because of a change in ownership.

Updates are made to correct data such as address, banner, etc. and not to ownership information. Refer to the Establishments section of this manual for more information.

- The fields will become text fields
- Make the necessary updates
- If not already complete, identify the Recognized technician ID by entering the box or choosing the Select from list hyperlink
- Choose the option at the bottom of the window that matches the action you wish to take
  - Select Save to complete the update
  - Select Cancel to abandon the update
- You will be returned to Step 1: Create work order
Features

ORA offers many features and types of transactions that can be completed. In this section, features and tools within the application that have not been addressed in the previous sections are explained.

You will find information in this section about the:

- dashboard
  - what is included in the dashboard and how to navigate the options
- filter and sort options
  - how to use filter and where the filter options are
  - how to use sort and where you can use sort
- Message centre
  - what is in the Message centre and how to use the Message centre
- reports
  - what reports are available / the report types
  - why or when a report is used
  - what search criteria and report results are available for each type of report
- search function
  - how to use the search function
  - tips on how to maximize your search results
  - what actions you can use search for

Dashboard

The dashboard is the main portal of ORA and is the default page view after having logged in.

In this section, the dashboard options that are not outlined in detail elsewhere in this manual are explained. The features that are outlined in detail elsewhere are listed with a reference to the other section of this manual. Each box on the dashboard offers a quick link to the following transactions in ORA (listed alphabetically; screen display is different):

- Add establishment profile
  - Refer to the Add establishment profile subheading in the Establishments section of this manual for more information about how to use this feature
- Create a report
• Refer to the **Reports** subheading in this section of the manual for more information about how to use this feature

• **Create work order**
  
  o Refer to the **Work orders** subheading in the **Certificates, work orders and worksheets** section of this manual for more information about how to use this feature

• **Download blank Device Examination Worksheet**
  
  o Refer to the **Worksheets** subheading in the **Certificates, work orders and worksheets** section of this manual for more information about how to use this feature

• **Search**
  
  o Refer to the **Search** subheading in this section of the manual for more information about how to use this feature

• **Transfer devices**
  
  o Refer to the **Transfer a device** subheading in the **Devices** section of this manual for more information about how to use this feature

• **Upload completed worksheet**
  
  o Refer to the **Worksheets** subheading in the **Certificates, work orders and worksheets** section of this manual for more information about how to use this feature

• **View open work orders**
  
  o Refer to the **View open work orders** subheading in the **Certificates, work orders and worksheets** section of this manual for more information about how to use this feature

• **View user profiles**
  
  o Refer to the **Manage and view other users’ profiles** subheading in the **Accounts** section of this manual for more information about how to use this feature.

The list of options you will see depends on your user profile, for example, read-only users will only have the search and create a report options.
Navigation bar

Common to all screens in ORA are the four links found on the page header next to the word Welcome.

- **User Name** indicates the name of the individual logged in
  - Select your name to view your user profile information
  - You can update your email address, email notification and official language choices
  - Refer to the Accounts section of this manual for more information about managing your account

- **Message centre** is a link to the Message centre of the application
  - The number next to the words Message centre indicates the number of unread messages in your Message centre
  - Refer to the Message centre section for more information

- **Dashboard** is a link that will bring you back to the Dashboard

- **Logout** is a link to log you out of the application

Filter and sort

Filter

There are several windows within the application that offer a **Filter items** box. Using a filter can help limit the displayed information to make it easier to find what you are looking for.

You can use filters to further refine search results in the Certificates and Notices tabs in the View establishment profile window, in the Message centre and the View open work orders window.

Sort

The sort buttons that appear as arrows next to column headings in some windows and tabs offer the option to reorder the appearance of the data in either ascending or descending format, based on the column you choose.

You can use the sort arrows to change the display in the following windows: search results, in the Certificates and Notices tabs in the View establishment profile window, in
the Message centre, and in the View open work orders. Select the downward pointing arrow to sort in descending order and select the upward pointing arrow to sort in ascending order.

**Message centre**

The Message centre works like an inbox within ORA. You can receive notifications related to your transactions created, informational updates from Measurement Canada, etc.

There are three tabs found on the Message centre screen.

- **Notifications** – Messages that are sent specifically to you (e.g. certificates, transfer notices, establishment changes)
- **Announcements** – Bulletins and announcements from Measurement Canada to specific users or groups
- **Archived notifications** – Messages archived by the user

Messages under these tabs can be sorted or filtered (refer to the Filter and sort subheading in this section of the manual for more information). Different icons in the **Status** and **Actions** columns indicate the different options and information for each message. While you can use the **Legend** on the screen while in the **Message centre**, the list below each icon and description keeps the information at hand as you navigate the screens.

- All messages display the View message icon in the Actions column
- New messages or unread messages are indicated in the Status column by a closed envelope
  - New or unread messages are also indicated by bold font in the row
- Read messages are indicated in the Status column by an open folder
  - Messages that have been viewed before are also no longer in bold font
- When a message is indicated as Read, you can use the briefcase icon in the Actions column to archive a message
- When in the Archived notifications tab, you can select the right arrow in the Actions column to restore a message to the Notifications tab
- The Notifications and Announcements tabs include the Compose general message button
Information – “Compose general message” button

Use this button to send an email to the ORA Support Desk.

Only the information you enter in the message will be sent to the ORA Support Desk; none of the information about the establishment, certificate or device you are asking about will be included unless you type it into the message. Whatever information that was displayed when you selected the button is not included in your message to the ORA Support Desk.

Reports

The four reports available in ORA are intended to look up examination information that has been entered and to use the reports results to help plan examinations. For example, you could search for all certificates entered by your company to see what has been entered, or you could search for platform scales that have a NEDD within a particular period in order to plan your next examination list. Within ORA, the Reports and Search functions work similarly.

In order to maintain the speed of the application, the reports have a 10,000 record limit; only the first 10,000 matching records will be returned in the report. If your search parameters are broad, it’s likely your query will exceed 2,000 records. It’s recommended that you select Microsoft Excel as the file format for your reports. If the file opens with 10,001 rows (header row plus 10,000 matching records), you may wish to narrow your search criteria and rerun the report until you have fewer than 10,000 records per report to ensure you have the full picture of data meeting each of your criteria.

Example: Searching all examinations from 2015-04-01 to 2016-03-31 may result in more than 10,000 matching records; it’s dependent on what information you have access to in ORA. If you work for a smaller organization, maybe you only need to run one report because you did 1,800 examinations in that period. However, if you work at Measurement Canada, and specify only a time period, your report will pull all examination results regardless of organization and you will need to run multiple reports to get all the data.

Which report you choose depends on what information you need.
Create a report

- Go to the **Dashboard**
- Select the **Create a report** hyperlink
- You will be moved to the **Create report** window
- Determine which report you want (each report’s search criteria, report headers and possible uses are below)
- Specify the report by selecting the **Create report** icon in the **Action** column
- You will be moved to a new screen to select the search criteria
- Specify the search criteria for the report you want
  - Where there is an **Add** button to the right of the field, you must select the button after entering each parameter
  - Where there is no add button, either enter text or select from the drop-down list that will appear when you click or tab into the box for that criterion
  - To remove search criteria, select the **X** button beside each selected item
- Specify the **Report format** (mandatory field)
  - Select **CSV comma delimited for English OS** if you want a text format in English
  - Select **CSV semicolon delimited for French OS** if you want a text format in French
  - Select **Microsoft Excel 2003+ (*.xls)** for a spreadsheet format

**Information – Column headings in reports.**

Regardless of what report type you choose, the column headings will be displayed in the language you are currently using for ORA.

- Choose the button at the bottom of the screen for the action you wish to take
  - Select the **Create report** button to proceed
  - Select the **Cancel** hyperlink to abandon the report and return to the dashboard
  - Select the **Reset** hyperlink to clear the search criteria you entered
Device Report

The Device Report lists devices that match the search criteria you specify. This report can be useful when planning travel and you want to know what devices are in an area or to try to estimate how much time might be needed in an area to examine all the devices due in a particular device type (e.g. gas pumps). You may wish to know what and/or how many devices so that you can plan your work accordingly. Another reason to use the report is to know how many devices there are in a specified area. Examples:

- number of devices of a particular device type
- number of devices of a particular device type within a trade sector
- what devices are within a certain postal code in a city or district

If you are searching for volume devices, it’s particularly useful to refine the report by product type. If you’re conducting mass searches, you may want to refine by device type and possibly trade sector.

Search criteria you can use

- Establishment ID
- Legal or operating name
- City
- Province
- Postal code
- District
- Trade sector
- Device type
- Product type
- Last examination date (from and to fields)
- Next examination due date (from and to fields)

Fields returned in the report

- Establishment ID
- Legal name
- Operating name
- Banner
- Address
- City
- Province
• Postal code
• Telephone number
• Region
• District
• Trade subsector
• Trade subsector description
• Device type
• Device type description
• Device subtype
• Device subtype description
• Product code
• Product code description
• Capacity/unit of measurement
• Interval/unit of measurement
• Serial number
• Approval number
• Secondary serial number
• Secondary approval number
• Last examination date
• Next examination due date

**Examination Details Report**

The Examination Details Report returns the most comprehensive and complete information about examinations that have been completed. You will find this report especially useful if you need all the data about examinations and wish to view multiple criteria or use the data for other reporting or statistical information. You can also use this report if you want to know whether approval numbers are still in use, where the numbers have been used and what examination types there have been. If you conduct a search based on device type and the from and to dates in the last examination date, you will be able to see when the approval number is included in examinations.
Search criteria you can use

- Establishment ID
- Legal or operating name
- Employee (refers to Measurement Canada employees)
- Technician (refers to ASP employees)
- Active technicians only
  - The default is to search by active technicians only. If you wish to search by all technicians, unselect the checkbox
- City
- Province
- Postal code
- Organization
- District
- Trade sector
- Device type
- Product type
- Examination type
- Examination date (from and to fields)
- Next examination due date (from and to fields)

Data fields returned in the report

- Certificate No
- Establishment ID
- Legal name
- Operating name
- Banner
- Address
- City
- Province
- Postal code
- Inspector/technician
- Trade subsector
- Serial number
- Approval number
- Secondary serial number
• Secondary approval number
• Device type
• Device subtype
• Capacity/unit of measurement
• Interval/unit of measurement
• Examination date
• Submitted date
• Number of days
• Next examination due date
• Component serial number
• Component approval number
• Component description
• Product type
• Examination type
• Recognized technician ID
• Standard type used for audit
• Seal status
• As found
• Result
• Standard type
• Standard ID
• Equipment used
• Device comment
• Overall comments

**Examination Report**

The Examination Report can be used to view the establishment information and basic examination data that meet the search criteria you specify. You may wish to use this report if you want to see what certificates were issued in a particular area or by a particular technician or inspector but do not need to view the examination results or details.

**Search criteria you can use**

• Establishment ID
• Legal or operating name
• Employee
• Technician
• Active technicians only
  o The default is to search by active technicians only; if you wish to search by all technicians, unselect the checkbox
• City
• Province
• Postal code
• Organization
• District
• Trade sector
• Device type
• Examination date (from and to fields)
• Next examination due date (from and to fields)

Data fields returned in the report

• Certificate no
• Establishment ID
• Legal name
• Operating name
• Banner
• Address
• City
• Province
• Postal code
• Inspector/technician
• Examination date
• Examination type
Search

The ORA search function is a useful and powerful tool that can save you time. You can use search for many of your transactions, for example transferring devices, finding establishments or looking up other information.

Conduct a search

- Go to the **Dashboard**
- Select the **Search** link
- You will be moved to the **Search for an establishment** window
- To conduct a search, you need to enter search criteria in the **Establishment search criteria** section of the screen. You can specify criteria by entering information in at least one of the following fields
  o Legal or operating name
  o Establishment ID
  o Banner
  o Address
  o City
  o Province
  o Postal code
  o Telephone
  o Trade sector
  o Trade subsector
  o Device serial number
  o Device approval number
  o Certificate number
  o Status of establishment
    - The default option is **Open**; use the toggle button to change to **Closed**
    - This option is only available to Measurement Canada ORA users
- After entering your search criteria, choose the option at the bottom of the screen for the action you wish to take
  o Select the **Search** button to continue
o Select the **Cancel** hyperlink to abandon the search and return to the dashboard

- After selecting **Search**, you will be moved to the **Search results** window

**Warning – If the search criteria you specified return over 100 matches, no search results will be displayed.**

You must refine your search by narrowing the criteria already specified or entering additional criteria.

Select either the **Refine search** or **New search** hyperlinks on the screen to try again. Select the **Cancel** hyperlink to return to the dashboard.

### Search results

When you have entered search criteria that results in fewer than 100 matching records, you will be moved to the Search results screen that displays the establishments that match the criteria you specified.

**Information – Navigation options in the search results window.**

The icons and options available to you in the search results depend on the type of ORA user profile you have. If an icon or link does not appear, it is because your user profile does not include the authority to take that action.

You can use the options available on the screen as follows:

- select the **Request to merge establishments** hyperlink to change the view to the **Select to merge** window
  - refer to the **Request to merge establishments** subsection in the **Establishments** section of this manual for more information
- select the **Add establishment profile** hyperlink to move to the **Add establishment profile** window
  - refer to the **Add establishment profile** subheading in the **Establishments** section of this manual for more information about how to use this feature
• select the **Refine search** hyperlink to return to the previous window to add additional search criteria
  o the goal when selecting this option is to further shorten the **Search results** by entering additional criteria but not having to re-enter the current criteria
• select the **New search** hyperlink to return to the previous window and start a new search
  o the goal when selecting this option is to begin again and the previous entries are cleared
• use the **Filter items** box to shorten the list to only what you specify
  o refer to the **Filter** section of this manual for additional information about how to use this feature
• to change the display of the search results, use the **Sort** arrows available in the following columns: **ID**, **Legal name**, **Operating name**, and **Address**
  o refer to the **Sort** section of this manual for additional information about how to use this feature
• select an icon in the **Actions** column, based on which option you wish to use
  o select the **View establishment details** icon to review additional information about the establishment

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**Information – View examination type information for P4 and F4 examination types**

Measurement Canada users can view the standard type information used by recognized technicians.

From the **View establishment details** window:

- Select the **Certificates** tab
- Select the **View** icon for the **Certificate number** applicable to the device **Serial number** details you want to display
- From the **Examined devices** list, select **View** in the **Actions** column for the device you want to display

  o select the **Create work order** icon if you wish to begin a work order
• refer to the work orders section of this manual for additional information
  o select the Request to close establishment icon if an establishment is no longer in business
• Refer to the request to close establishment information in the Establishments section of this manual for more information
• select the Cancel hyperlink at the bottom of the page to return to the dashboard

Tips to get better search results

• Search is not case sensitive
• Consider using partial postal code (e.g. first three or four characters) instead of the full postal code
• Consider using partial street addresses
  o For example, if the establishment is on St. Laurent Boulevard, enter Laurent in the address and include the city in the City field. The reason being that St. Laurent can be entered as “St. Laurent”, “St-Laurent”, “St Laurent” or “Saint Laurent” and ORA will only find what you seek if what you enter matches what the person before you entered
  o For example, after entering the name of the street, include only a partial identifier, such as “ave” instead of “avenue” or “boul” instead of “boulevard”
  o Try leaving the street type off the search entirely, for example, enter main in the address field and include another criterion, such as city or postal code. That way, if someone made a mistake before and entered “street” when it’s really “avenue”, you will find the establishment and can make the update to correct the address
• When searching by legal or operating name, try to correctly include all punctuation, such as hyphens, apostrophes and commas

Revisions

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<td>Early 2014</td>
<td>Updated information for changes to system from pilot testing – for Measurement Canada roll-out of ORA</td>
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<tr>
<td>3.0</td>
<td>April 2015</td>
<td>Updated information to capture regulation changes and roll-out/field updates</td>
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<td>3.1</td>
<td>December 2015</td>
<td>Updated sections B.5 to B.10 to reflect changed options for entering rural addresses and directions.</td>
</tr>
<tr>
<td>4.0</td>
<td>March 2016</td>
<td>Version 4 of the Online Reporting Application (ORA) User Manual reflects the following major changes, to create stand-alone documents:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Removed the Online Reporting Application Terms and Conditions of Use.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Removed sections B, C, D, E, F and appendices 1, 3, 4, 6 and 8.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The removed information can be found in other documents as follows:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Online Reporting Application Terms and Conditions of Use</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Device Manual created from sections:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>o B – Establishment Field List</td>
</tr>
<tr>
<td></td>
<td></td>
<td>o C – Device Field List</td>
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<tr>
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<td></td>
<td>• Commodities manual created from sections:</td>
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<tr>
<td></td>
<td></td>
<td>o D – Application Guide: Commodity Examinations</td>
</tr>
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<td></td>
<td></td>
<td>o E – Non-Retail / Retail Commodity Field List</td>
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<td></td>
<td></td>
<td>o F – Clerk Served Commodity Field List</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Device type and subtype tables created from Appendix 1</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Trade sector tables created from Appendix 3</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Product code table – devices created from Appendix 4</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Product class tables - commodities created from Appendix 6</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Equipment usage tables created from Appendix 8</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The Online Reporting Application (ORA) User Manual version 4.0 supersedes all previous versions of ORA user manuals.</td>
</tr>
<tr>
<td>5.0</td>
<td>February 2017</td>
<td>• Updated title page with new departmental name and graphic</td>
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<td></td>
<td></td>
<td>• Reordered all sections and updated content to Canada.ca style (plain language and writing for the web)</td>
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<tr>
<td></td>
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<td>• Removed section numbering</td>
</tr>
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<td></td>
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<td>• Updated content to incorporate changes to information</td>
</tr>
<tr>
<td>Version</td>
<td>Date</td>
<td>Revisions</td>
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<td>and instructions due to changes to the application</td>
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<td>• Updated requirements for comments in merger and closure requests, based on Measurement Canada senior management decision</td>
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