Table of contents

Online Reporting Application User Manual

This manual is intended for employees of authorized service providers (ASPs) and Measurement Canada (MC) who need to use the Online Reporting Application (ORA). It explains how to use the application, from navigating the pages to performing various actions, such as creating an account, running reports and submitting inspection results.

Within this document, the terms “inspection” and “examination” are used interchangeably. Definitions of commonly used terms and 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.

In addition, the names of ORA pages, tabs, menu options, columns, fields and buttons are highlighted in this document using **bold text** to make it easier to look for them within the instructions. References to related documentation are hyperlinked.

Section 1: User accounts

This section provides information on the ORA terms and conditions of use, the prerequisites to using ORA, as well as instructions on how to create and manage user accounts.

1.1 Terms, conditions and termination of use

When using ORA, you must comply with the ORA terms and conditions of use and with Innovation, Science and Economic Development Canada's (ISED) website 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 - Terms and Conditions

1.2 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 the mandatory ORA training.

- Register for an Online Reporting Application training session

The training is a self-paced online course conducted in the official language of your choice, and consists of videos, readings and quizzes.

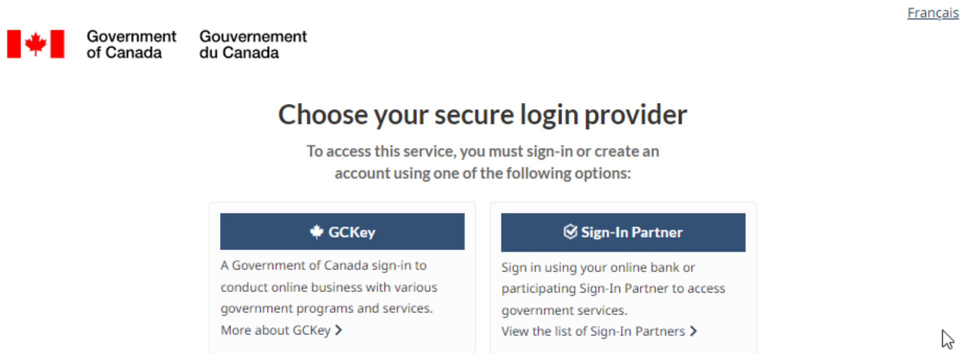
You must achieve a passing grade of 80% or higher on the final exam to successfully complete the course and create an ORA account. Once you have successfully completed the training and are authorized to use ORA, you will receive an email from Measurement Canada with your account registration instructions. This email includes a hyperlink to the secure sign-in page, as well as your assigned user type and user ID. You will need this information to create your account.

1.3 Create an Online Reporting Application user account

Use the hyperlink provided in the email sent to you from Measurement Canada or enter https://www.ic.gc.ca/app/scr/mc/mgmt/secure/dashboard.html in your browser's address field.

Step 1: Choose a secure login provider

Log in to a GCKey account or Sign-In Partner account, such as your online banking account.



Option 1: Use an existing Sign-In Partner account

1. Select **Sign-in Partner**.
2. On the **Select Sign-in Partner** page, select your financial institution.
3. Once you are redirected to your financial institution's sign-in page, enter your sign-in information.
4. You will be redirected to the **Government Sign-In Terms and Conditions** page; read and accept the terms and conditions.
5. You will be redirected to the **Complete your ISED Account** page; enter your first name, family name and email address, then select **Continue**.
6. You will receive an on-screen message asking you to verify your email.
7. An email will be sent to you to confirm your account; open the email and select the **Confirm your account** link.
8. You will be directed to the **Create an Online Reporting Application user profile** page.
9. Proceed to Step 2.

Option 2: Use an existing GCKey account

1. Select **GCKey**.
2. Enter your username and password, then select **Sign In**.
3. You will be redirected to the **Complete your ISED Account** page; enter your first name, family name and email address, then select **Continue**.
4. You will receive an on-screen message asking you to verify your email.
5. An email will be sent to you to confirm your account; open the email and select the **Confirm your account** link.
6. You will be directed to the **Create an Online Reporting Application user profile** page.
7. Proceed to Step 2.

Option 3: Create a GCKey account

1. Select **GCKey**.
2. Select **Sign Up**.
3. Read and accept the Terms and Conditions of Use.
4. Create your username and select **Continue**.
5. Create your password and select **Continue**.
6. Create your recovery question, answers and hints, then select **Continue**.
7. You will be redirected to the **Complete your ISED Account** page; enter your first name, family name and email address, then select **Continue**.
8. You will receive an on-screen message telling you to verify your email.
9. An email will be sent to you to confirm your account; open the email and select the **Confirm your account** link.
10. You will be directed to the **Create an Online Reporting Application user profile** page.
11. Proceed to Step 2.

Step 2: Create your user profile

1. From the **Create an Online Reporting Application user profile** page, select your employer (i.e. select **Measurement Canada** if you are a MC employee or select **Authorized service provider** if you work for an ASP).
2. Enter the requested information (e.g. user type and user ID) that was included in the email you received after completing your ORA training, then indicate your language preference and select **Submit**.
3. A “Create an account – success” message will display.
4. You will receive an email confirming that your account is active.

User types and permissions

Your assigned user type is determined by the role you have in the organization. Each user type is given different permissions.

- User types assigned to ASP employees:
  - Administrator – you can enter examination results in ORA on behalf of recognized technicians
  - Manager – you are designated by your organization as the manager in ORA and can approve ORA user accounts for your organization and enter examination results in ORA on behalf of recognized technicians
  - Recognized technician – you can enter your own examination results in ORA
  - Finance – you can only access ORA to pay ASP fees
- User types assigned to MC employees:
  - Administrator – you are a district manager and can extend examination due dates, enter enforcement actions and examination results in ORA on

behalf of inspectors
- Inspector – you are an inspector and can enter your own examination results and enforcement actions in ORA
- Limited access – you are an administrative assistant and can update establishment profiles and device information but cannot initiate a work order
- System administrator – you are an ORA support desk agent responsible for monitoring the day-to-day operations of ORA and for providing assistance to its users; you can review and approve ORA user accounts
- Read-only – you can only view establishment profiles and device information in ORA

Account approval

All ORA user accounts require approval by the ORA support desk. User accounts of ASP employees are approved by the ASP manager before new user account requests are sent to the ORA support desk.

Information - New 2-step verification process to log into your account

Multi-factor authentication is required to access external Government of Canada applications. Upon initial login, you will be asked to select a 2-step verification method. The choices are:

- Authenticator application
- Phone call
- Text message
- Email message

Each time you log into ORA, you will need to enter a unique, one-time verification code provided to you via the 2-step verification method you have selected.

Account management

The ASP manager is responsible for managing ORA user accounts within their organization and must approve new ORA user accounts.

Once an ASP user account is created, an email notification is generated. To approve the account:

1. Log in to ORA.
2. Select **Message centre**.
3. In the **Notifications** tab (default view), select the **View message** icon in the **Actions** column of the notification.
4. Review the information provided and ensure the details are correct.
5. Select **Next**.
6. Select “Yes” from the **Approve** drop-down list in the **Manager approval** section at the bottom of the page.
7. Select **Confirm**.

After you confirm, you will be redirected to a confirmation page notifying you that the approved user registration has been sent to the ORA support desk.

New user accounts

The ORA support desk reviews new user account requests 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 there are issues with your account, you will receive an email explaining the issues and the follow-up steps.

User account creation summary

To summarize, the process is:

1. Select a secure sign-in method.
2. Create an ORA account.
3. Your account is approved by the ASP manager (ASP users only).
4. Your account is approved by the ORA support desk.

1.4 Access your user account

Critical – Do not share your user account login information

Only the designated (named) user of an ORA account is authorized to use it. Sharing or transferring account information is a contravention of the Online Reporting Application Terms and Conditions of Use.

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

Information – Authorized service provider accounts

Each ASP must designate a manager in ORA. The manager account must be created and approved before other ORA accounts for the ASP can be created.

1. Enter https://www.ic.gc.ca/app/scr/mc/mgmt/secure/dashboard.html into your web browser's address field.
2. Select your preferred secure sign-in method and log in.
3. Once logged in, you will be directed to the ORA **Dashboard**.

1.5 Manage your user account

You can update some account settings in your ORA user profile (email address, email notifications and language preference); however, if you wish to change your password, challenge question or personal information, you must do this through your GCKey or Sign-In Partner account.

To automatically receive a copy of the certificate for each work order you submit, update your user profile as follows:

1. Access your user profile by selecting your hyperlinked name in the upper right portion of the page.
2. Locate the “Receive a copy of certificates” option in your user preferences.
3. Select “Yes” in the drop-down list.
4. Select **Save**.

1.6 Manage and view user profiles

Only ASP managers can view and manage the profile of other ORA users within their organization. Most account changes require the assistance of the ORA support desk.

Approve user profiles within the organization

As an ASP manager, you will be notified in the ORA **Message centre** of any pending account requests. It is your responsibility to ensure that ORA users in your organization have completed the required training and requested the correct ORA user type.

Change user profiles within the organization

As an ASP manager, you can submit a request to change ORA user profiles associated with your organization. To do so, you must email a request to the ORA support desk and provide the name of the user whose profile you want to have changed and all relevant details (e.g. user has left the organization or user’s role within the organization has changed).

ASP manager leaves the organization

There must be one employee within your organization designated as the ASP manager in ORA at all times. If that employee leaves your organization, you must advise the ORA support desk or your auditor immediately.

Recognized technician or administrator leaves the organization

The user profiles of recognized technicians are validated against the Schedule A agreement between the ASP and Measurement Canada. If a recognized technician or an administrator leaves your organization, you must email the ORA support desk to have their account deactivated. The email must include the user name, recognized technician ID (where applicable) and departure date.

View user profiles

To view your organization’s user profiles in ORA, follow these steps:

1. Go to the **Dashboard**.
2. Select the **View user profiles** link.
3. The **View user profiles** page will display.
4. By default, new user profiles are displayed. Use the filters to display other profiles by user type or user status, or enter a person's name in the **Name** field, then select **Filter**.
    - Select **Clear** to reset the filters.
5. To view the profile information, select the **View detailed user profile** icon from the **Actions** column.
6. Select the **Download ASP user report** link to obtain a list of the users associated with your organization. The list will include both active and inactive users.

Section 2: Features

This section describes the main features and tools within the application:

- **Dashboard**
    - what options are included in the dashboard and how to navigate them
- **Message centre**
    - what it is and how to use it
- **Filter and sort**
    - how to use the filter function and where it is available
    - how to use sort function and where it is available
- **Display defaults**
    - how to change the number of items displayed

2.1 Dashboard

Information – System updates and maintenance

Information about planned system outages are displayed at the top of the dashboard in a coloured text box.

Make a note of the information provided to limit the risk of being logged in or attempting to log in to ORA during a planned outage.

The **Dashboard** is the main portal of ORA and is the default page view after logging in. The options that can be selected from the dashboard are as follows:

- **Create work order**: This option allows you to start a work order.
    - See subsection 6.1: Work orders.
- **Upload completed worksheet**: This option allows you to upload a completed worksheet to generate the certificate.
    - See subsection 6.3: Device Examination Worksheet.
- **Search**: This option allows you to find establishments, devices and certificates.
    - See Section 3: Search.
- **Transfer devices**: This option allows you to transfer devices from one

establishment to another.
    - See subsection 5.6: Transfer a device.
- **View user profiles**: This option allows you to view the users within your organization.
    - See subsection 1.6: Manage and view user profiles.
- **View open work orders**: This option allows you to see work orders that you have started but not yet completed and work orders that were reopened but have not been resubmitted.
    - See subsection 6.2: View open work orders.
- **Download blank Device Examination Worksheet**: This option allows you to download a blank worksheet.
    - See subsection 6.3: Worksheets.
- **Add establishment profile**: allows you to create a new establishment profile.
    - See subsection 4.2: Add establishment profile.
- **Create a report**: This option allows you to request reports on establishments, devices, examinations, etc.
    - See Section 7: Reports.
- **Authorized service provider fees**: This option allows you to view fees and make payments.
    - See Section 8: Authorized service provider fees.
- **Information and resources**: This option allows you to download ORA related materials.
    - See Section 9: Information and resources.

The options that are available on your dashboard depend on your user profile. For example, read-only users will only have the **Search** and **Create a report** options on their dashboard.

Navigation Bar

The navigation bar is common to all pages in ORA and includes four links located next to the word “Welcome”:

- **Username**:
    - Select your username to view your user profile information and update your email address, email notification settings and official language choice.
    - Refer to subsection 1.5: Manage your account for more information about managing your account.
- **Message centre**:
    - The number of unread messages is indicated next to this link.
    - Select the link to access the messages and notifications sent to your message centre.
    - Refer to the Message centre section for more information.
- **Dashboard**:
    - Select this link to return to the dashboard from anywhere within the application.

- **Logout**:
  - Select this link to exit the application.

2.2 Message centre

The message centre is your inbox within ORA. This is where you will receive notifications, announcements, informational updates from Measurement Canada, etc.

There are three tabs on the **Message centre** page:

- **Notifications**: This tab will be displayed by default when you access the page. It is used to view messages (e.g. certificates, transfer notices, establishment changes) that are sent specifically to you.
- **Announcements**: Select this tab to view bulletins and announcements from Measurement Canada to specific users or groups.
- **Archived notifications**: Select this tab to view your archived messages.

Messages under these tabs can be filtered and sorted by date, subject, etc. See the Filter and sort section for more information.

Different icons are displayed in the **Flagged** and **Actions** columns for each message. Each icon represents a specific information or action you can take for managing your message. You can refer to the **Legend** at the top of the page while in the **Message centre** to remind you what each icon represents.

- All messages display the **View message** icon in the **Actions** column.
- New or unread messages are bolded; whereas read or opened messages are not bolded.
- The **Notifications**, **Announcements** and **Archived notifications** tabs include the **Compose general message** button.

Manage notifications

Notifications can be flagged, archived, deleted or restored.

Information - Automatic archiving and deletion

Notifications, whether unread or read, will be automatically archived after four (**4**) months. All archived notifications will be permanently deleted after one (**1**) year. Flagged notifications will not be automatically archived or deleted until they are unflagged.

Flag a notification

1. From the **Notifications** tab, select the notification’s **View** icon.
2. At the bottom of the notification, select the **Flag** button; the page will refresh and the button will change to **Flagged**.
3. Select **OK** to return to the **Message centre**; a **Flag** icon is now displayed in the notification’s **Flagged** column.

Archive notifications

There are several ways to archive notifications.

- When viewing a notification, select the **Archive** button located at the bottom of the page.
- Go to the **Notifications** tab:
  - Activate the checkbox in the **Select** column for one or more notifications then select the **Archive selected** button.
  - Select the **Archive all** button to archive all notifications.
  - Select the **Archive message** icon in the **Actions** column to archive a single notification.

Warning – Flagged notifications will be archived if selected.

While the automatic archiving and deletion does not apply to flagged notifications, manually selecting a flagged notification to be archived will move it to the **Archived notifications** tab.

Delete notifications

There are several ways to delete notifications.

- When viewing a notification, select the **Delete** button located at the bottom of the page.
- Go to the **Archived notifications** tab:
  - Activate the checkbox in the **Select** column for one or more notifications then select the **Delete selected** button.
  - Select the **Delete all** button to delete all notifications.
  - Select the **Delete message** icon in the **Actions** column to delete a single notification.

Restore an archived notification

- From the **Archived notifications** tab, select the **Restore** icon in the **Actions** column of a notification to move it back to the **Notifications** tab.
- When viewing an archived notification, select the **Restore** button located at the bottom of the page.

Compose general message

Within the **Message centre**, you can contact the ORA support desk to ask questions or report issues you are experiencing. Questions of a technical nature must be directed to your Measurement Canada contact.

1. Within the **Message centre**, select **Compose general message**.
2. Complete the required fields and provide as much detail as possible to describe your question or issue.

3. Select **Send** to deliver the message.
4. An ORA support desk agent will respond to the message.

2.3 Filter and sort

Filter

The **Filter items** field allows you to enter new search criteria in order to refine your search (i.e. limit the number of items displayed on the page) and make it easier to find what you are looking for.

The **Filter items** field is located below the legend in the following pages:

- **View establishment profile** (in the **Devices**, **Certificates** and **Notices** tabs);
- **Message centre;**
- **View open work orders.**

Sort

The **Sort** function consists of up and down arrows that can be used to reorder column data in either ascending or descending order.

The **Sort** function is located next to the column headings and is available in the following pages:

- **View establishment profile** (in the **Devices**, **Certificates** and **Notices** tabs);
- **Message centre**;
- **Search results**;
- **View open work orders**.

2.4 Display defaults

There are areas within the application where the number of items displayed is limited by a default setting. Use the available options to change the number of items displayed. Any change you make to the display will not be saved and the default setting will be reapplied once you exit the page.

- **Show [ ] entries** field:
  - Use this field to increase or decrease the number of items displayed.
- **Inactive devices** tab:
  - The display default is 500 devices. When the number of inactive devices for the establishment exceeds this limit, a date range or device serial number must be entered in the fields provided.
- **Certificates** tab:
  - Only the 500 most recent certificates are retrieved. Use the **Filter items** field to search among the most recent certificates or, for establishments with more than 500 certificates, provide an examination date range to

find certificates issued during the specified timeframe.

Section 3: Search

The ORA search function is a useful and powerful tool. You can use it to find an establishment's profile, devices, device examination certificates and other information.

3.1 Conduct a search

1. Go to the **Dashboard**.
2. Select the **Search** link; the **Search for an establishment** page will display.
3. In the **Establishment search criteria** section, enter search criteria in at least one of the fields (see also the Search tips section for guidance):
    - Legal or operating name: partial matches are accepted
    - Establishment ID: exact match only
    - Banner: use the **Select from list** link or start typing the banner name into the field and matches will appear
    - Address: partial matches are accepted
    - City: partial matches are accepted
    - Province: select an option from the drop-down list
    - Postal code: partial postal code is accepted (e.g. enter the first 3 or 4 characters)
    - Telephone: exact match only
    - Trade sector: select a sector from the drop-down list (not needed when a trade subsector is selected)
    - Trade subsector: select a subsector from the drop-down list
    - Device serial number: only active devices are searched (to locate inactive devices, refer to subsection 5.6 Transfer devices of the manual)
    - Device approval number: a device serial number (previous field) is required when an approval number is used as search criteria
    - Device secondary serial number: only active devices are searched
    - Device secondary approval number: a device secondary serial number (previous field) is required when an approval number is used as search criteria
    - Certificate number: exact match only
    - Work order / reference number: exact match only
    - Device transfer notice number: exact match only
4. After entering your search criteria, if you want to search a closed establishment, use the radio button below the **Status of establishment** heading to change the default status from **Open** to **Closed**.
5. Select **Search** to proceed to the **Search results** page; otherwise, select **Cancel** to abandon the search and return to the dashboard.

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 by adding additional criteria.

Select either **Refine search** or **New search** to try again. Select **Cancel** to return to the dashboard.

3.2 Search tips

- The search fields are not case-sensitive.
- Try not to be too restrictive with the search criteria or you may exclude the desired result.
- When the search does not return the desired result, try again using different search criteria, such as a partial postal code.
- Avoid using commonly abbreviated words as search criteria.
  - For example, the street name “St. Laurent” could be entered in several different ways, such as “St. Laurent”, “St-Laurent, “St Laurent” and “Saint Laurent”, so excluding the abbreviated part and entering “Laurent” only will improve the search results.
- Avoid using “Limited” and “Incorporated” as search criteria, as these terms are often abbreviated.
- Avoid entering the street type, such as “street”, “avenue” or “boulevard”, as these terms are often abbreviated.
- For words that include an accent, you may have to perform two separate searches, one using the spelling with the accent and one without the accent (e.g. for “Montréal”, search using “montreal” and again using “montréal”, or just use “montr”).
- Enter a partial postal code instead of the full postal code (e.g. “K1A0” instead of “K1A0C9”).
- Enter a partial street address (e.g. 151 or “Tunney”) and the city or a partial postal code in the appropriate fields.
- For small towns and rural areas, enter the town name in the City field rather than searching using the postal code.

3.3 Search results

When your search criteria return fewer than 100 matching results, the **Search results** page will display a list of the establishments that match the criteria you specified. The top of this page will show the criteria used for the search and the number of results found.

Information – Read-only user options

Read-only users can only view establishment profiles. They do not have access to the other options described in this section.

Use the options available on the page as follows:

- Select **Request to merge establishments** to access and view the **Select to merge** page.
  - Refer to Section 4: Establishments for more information.
- Select **Add establishment profile** to access and view the **Add establishment profile** page.
  - Refer to Section 4: Establishments for more information.

- Select **Refine search** to return to the **Search for an establishment** page and add additional search criteria in order to reduce the number of records located; the current criteria are retained.
- Select **New search** to return to the **Search for an establishment** page and start a new search.
- Enter data or text in the **Filter items** field to restrict the list to show only what you specify in the field.
  - Refer to Section 2: Features for more information.
- Use the sort arrows to change the order in which the search results are displayed in the following columns: **ID**, **Legal name**, **Operating name**, **Address** and **Actions**.
  - Refer to Section 2: Features for more information.
- Select an icon in the **Actions** column to perform the following tasks:
  - Select **View establishment profile** to review the establishment details.
  - Select **Create work order** to begin a work order.
    - Refer to Section 6: Work orders, worksheets and certificates for more information.
  - Select **Request to close establishment** to send a notification that an establishment is no longer in business.
    - Refer to Section 4: Establishments for more information.
- Select **Cancel** at the bottom of the page to return to the dashboard.

Section 4: Establishments

This section describes the steps to perform the following actions in ORA related to establishments:

- View an establishment profile
- Add an establishment profile
- Update an establishment's details, including its legal name and contact information
- Request to merge establishment profiles
- Request to close an establishment profile

You may refer to the Device manual for additional information.

4.1 View establishment details

The establishment's profile includes details such as its legal name, location and contact information. It also shows the date the establishment profile was created and the date it was last modified.

The tabs at the bottom of the page include information about:

- active devices
- inactive devices
- issued examination certificates
- transfer notices

Measurement Canada inspectors are also able to view tabs that provide information about commodity reports and enforcement actions.

To access an establishment's profile:

1. Perform a search to locate the establishment (see Section 3: Search for more information).
2. In the **Search results** page, select the **View establishment profile** icon located in the **Actions** column.
3. The **View establishment profile** page will display.
4. At the bottom of the page, select **Return to search results** or **Create work order**.

When viewing an establishment profile, you can also display the latitude and longitude of the establishment's location based on the address provided.

- Select the **Latitude and longitude** hyperlink to display the coordinates.
- Select the **View location on Google Maps** hyperlink to view the location on a map.

4.2 Add an establishment profile

You can add a new establishment profile in ORA when you have used the search function to determine that there is no existing profile for that establishment or there has been a change in ownership and a new establishment profile is required.

Option 1: Add an establishment profile from the Search results page

Step 1

1. Go to the **Dashboard**.
2. Select the **Search** option.
3. Enter the search criteria.
4. Select the **Search** button at the bottom of the page.
5. The **Search results** page will display.
6. If the establishment you are searching for is not listed, select the **New search** link to start another search using different criteria.
7. If the required establishment is still not found, select the **Add establishment profile** link.
8. The **Add establishment profile** page will display.
9. Proceed to step 2.

Option 2: Add an establishment profile using the dashboard link

Step 1

1. Go to the **Dashboard**.
2. Select the **Add establishment profile** link.
3. The **Add establishment profile** page will display.
4. Proceed to step 2.

Step 2

Refer to the Device manual for detailed information about the fields mentioned below.

In the **Establishment details** section:

1. Enter the establishment's legal name in the **Legal name** field (required) and its operating name in the **Operating name** field.

Warning – If the establishment's legal name starts with a series of numbers such as "1234567 Canada Inc.", you must also provide an operating name.

2. Enter the banner in the **Banner field** (required) or select a banner using the **Select from list** link.

Information – Enter or select "IND – Independent" in the Banner field when:

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

3. Enter the address in the **Address** field (required).
4. Enter the city in the **City** field (required).
5. Select the province or territory from the **Province** field (required) drop-down list.
6. Enter the postal code in the **Postal code** field (required).
7. Enter the telephone number in the **Telephone** field (required).
8. If the establishment is a factory, activate the **Factory** checkbox.

Critical – Only activate the Factory checkbox when the establishment is not the end user.

The establishment of a manufacturer, dealer, distributor or authorized service provider is considered a "factory" when it is the premises from which the device will be sent to the end user.

9. Complete the **Directions** field, as needed.
10. Complete the **Establishment notes** field, as needed.
11. Go to the **Details of establishment's contact person** section.
12. Enter the contact person's name in the **Name** field.
13. Enter the contact person's job title in the **Title** field.
14. If applicable, enter the email address in the **Email** field.

- If the establishment requests that a second recipient receive automatic notifications for examination certificates, select the **Add another email address** link and enter the recipient's email address in the **Secondary email** field.

15. If the **Recognized technician ID** field (or the **Inspector ID** field for MC users) is not prefilled, enter the applicable ID or use the **Select from list** link to search for the applicable ID.

    Note: This field is prefilled with your ID, unless your ORA user type allows you to enter device inspection results on behalf of recognized technicians or inspectors.

16. In the **Provide comments to Measurement Canada** section, complete the **Standardized comments** field (required) by selecting the applicable option from the drop-down list:
    - Select **New Establishment** if you are adding the establishment because the establishment is new.
    - Select **New owner of existing establishment** if you are adding the establishment because of a change in ownership; however, you must remember to submit a **Request to close establishment** for the previous owner's establishment.
    - Select **ORA support desk requested** when you are adding the establishment because of a request from the ORA support desk.
    - If none of the above options apply, select **User entered comment** and enter comments in the **Comments** text field to explain why you are adding an establishment profile.
17. At the bottom of the page, select the **Submit** button; otherwise select **Cancel** to discontinue and return to the dashboard.
18. If there are existing establishment profiles that contain similar information to what you have entered, a verification warning will display:
    i. Review the list of similar establishments that ORA generated.
    ii. If the establishment is listed, use the radio button in the **Select** column to select that establishment's profile.
    iii. Select **Next** to access the **View establishment profile** page, then select the appropriate action:
        - Select the **Update** button in the **Establishment details** section to make changes (only MC users have access to this option).
        - Select **Return to Add establishment profile: Profiles found** to return to the previous page.
        - Select **Create work order** to proceed with a work order for this establishment.
    iv. 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", then select **Next**.
    v. If you selected **Next**, you will be redirected to the **Confirmation** page.
19. Choose the action you wish to take:

- Select **Dashboard** to return to the dashboard.
- Select **Create work order** to create a work order for the establishment whose profile you added.
- Select **Transfer devices** to proceed to step 2 of the transfer process.

4.3 Update establishment details

Information included in the establishment profile can be updated. To do this, you must complete a work order.

Within the **Step 1: Create work order** page, you will see the current establishment details:

1. Select **Update**.
2. Make the necessary changes to the text fields.
3. If the **Recognized technician ID** field (or the **Inspector ID** field for MC users) is not prefilled, enter the applicable ID number or use the **Select from list** link to search for the applicable ID.
4. At the bottom of the page, select **Save**; otherwise, select **Cancel** to discontinue and return to the previous page.

Update the legal name of an establishment

An establishment’s legal name can only be changed in ORA when there are errors or omissions.

The **Legal name** field can be updated only in the following situations:

- The legal name recorded contains a spelling or punctuation error.
- The establishment’s legal name and operating name are recorded as the legal name.
- The operating name or banner is recorded as the legal name.
- Where applicable, “Ltd.” or “Inc.” is missing.

Critical – Do not update an establishment’s details when there has been a change of ownership.

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

A change in ownership requires that a new establishment profile be added in ORA. Any devices used at the former establishment that are in use at the new one are to be transferred to that establishment and a request to close the previous owner’s establishment must be submitted.

Submit a request to update the legal name of an establishment

1. Go to the **Dashboard**.
2. Select the **Search** or **Create work order** option.

3. Enter the search criteria.
4. The **Search results** page will display.
5. Select the **Create work order** icon in the **Actions** column for the applicable establishment.
6. The **Step 1: Create work order** page will display.
7. In the **Establishment details** section, select **Update**; the resulting page will allow you to edit the establishment details fields.
8. Make the necessary changes to the **Legal name** field.
9. If the **Recognized technician ID** field (or the **Inspector ID** field for MC users) is not prefilled, enter the applicable ID or use the **Select from list** link to search for the applicable ID.
10. In the Provide comments to Measurement Canada section, complete the **Standardized comments** field (required) by selecting the appropriate option from the drop-down list:
    - Select **Added legal name** if you added the legal name.
    - Select **Corrected legal name** if you corrected errors in the legal name or other information that was missing.
    - Select **ORA support desk requested** if you made changes because of a request from the ORA support desk.
    - Select **User entered comment** if none of the above options apply and provide an explanation in the text box of the **Comments** field.
11. Select **Save** to update the information; otherwise, select **Cancel** to exit this page (the changes will not be saved).

4.4 Merge establishment profiles

The option to merge establishment profiles can be useful when there are some duplicate entries of establishment details in ORA. Duplicate entries can be created by mistake because of confusing addresses, mistyped postal codes and other errors.

If you believe there is a duplicate establishment profile, review the establishment details of each establishment to determine which profile should remain active. Do not request to merge establishment profiles when there has been a change of ownership.

Before requesting to merge duplicate establishment profiles, make sure you close any open work orders for any of the establishments proposed for merger. The request cannot be processed while there are related open work orders. If the open work order wasn’t created by you, contact the ORA support desk who will follow up with the ORA user whose work order is open.

Critical – Mergers cannot be reversed.

You must be certain the establishment profiles you wish to merge are duplicates and there has not been a change of ownership. Once a merger request is processed by the ORA support desk, it cannot be cancelled.

Submit a request to merge establishment profiles

1. Go to the **Dashboard**.
2. Select **Search**.
3. Enter the search criteria.
4. Select **Search** at the bottom of the page; the **Search results** page will display.
5. All of the establishments you wish to merge must appear in the list. If they are not, you have to conduct a new search that will include all of the applicable establishments.
6. Select the **Request to merge establishments** link located above the legend.
7. The **Select to merge** page will display.
8. In the **Select to merge** column (first column), activate the checkboxes for the establishments you wish to merge.
9. At the bottom of the page, select **Request to merge establishments** to proceed; otherwise select **Cancel** to return to the previous page.
10. After selecting **Request to merge establishments**, the **Send notification** page will display.
11. In the **Establishments to be merged** section, select the radio button of the establishment profile that needs to remain active.

Information – Determining which establishment profile should remain active.

Keep the establishment profile that contains the most correct or recent information. If in doubt, contact the ORA support desk for guidance.

12. If the **Recognized technician ID** field (or the **Inspector ID** field for MC users) is not prefilled, enter the applicable ID or use the **Select from list** link to search for the applicable ID.
13. In the Provide comments to Measurement Canada section, complete the **Standardized comments** field (required) by selecting the appropriate option from the drop-down list:
    - Select **Duplicate establishment** to merge two or more establishment profiles that you believe were entered multiple times for the same establishment.
    - Select **ORA support desk requested** to merge two or more establishment profiles at the request of the ORA support desk.
    - Select **User entered comment** to provide comments or justification for the merger request; this is particularly necessary when the establishment profiles are not exact duplicates.
    - If you selected **User entered comment** and completed the **Comments** field, you must activate the checkbox next to the mandatory acknowledgement that you reviewed the information and it is correct.

Critical – Submitting a merger request without a prior visit to the

establishment site.

It is recommended you visit the establishment site before submitting a merger request. However, if you have not visited the site, but are certain that the establishment profiles are exact duplicates, you must complete the **User entered comment** section to explain how you determined the duplicates need to be merged. For example:

- You phoned the establishment and checked ownership details.
- The name of the establishment 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 establishment is located at an intersection which resulted in one establishment profile showing one street address and the other profile showing the other street address).

14. At the bottom of the page, select **Submit** to continue; otherwise, select **Cancel** to return to the previous page.
15. If you selected **Submit**, the **Confirmation** page will display.
16. Select **OK** to finish and return to the **Search results** page.

4.5 Close an establishment profile

An establishment profile is closed when the establishment is no longer in business or has changed ownership.

If an establishment moves locations but the ownership stays the same, update the establishment address details as opposed to creating a new establishment profile and closing the existing one.

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

Submit a request to close an establishment profile

1. Go to the **Dashboard**.
2. Select **Search**.
3. The **Search for an establishment** page will display.
4. Enter the search criteria.
5. Select **Search** when ready to proceed.
6. The **Search results** page will display.
7. In the **Actions** column, select **Request to close establishment**.
8. The **Send notification** page will display.
9. If the **Recognized technician ID** field (or the **Inspector ID** field for MC users) is not prefilled, enter the applicable ID or use the **Select from list** link to search for the applicable ID.
10. In the Provide comments to Measurement Canada section, complete the **Standardized comments** field (required) by selecting the appropriate option

from the drop-down list:

- Select **Establishment no longer exists** if you are submitting the request because the establishment has ceased operations.
- Select **New owner of establishment** if you are submitting the request because the ownership of the establishment has changed; if you select this option, you may also need to add an establishment profile for the new establishment and transfer any devices that are in use at the new establishment.
- Select **ORA support desk requested** if you are closing this establishment at the request of the ORA support desk.
- Select **User entered comment** if you wish to provide comments or if none of the above options explain the reason why you are closing the establishment.

Critical – Submitting a closure request without a prior visit to the establishment site.

It is recommended you conduct a site visit before submitting a request to close an establishment profile.

If you submit a request without visiting the establishment, select **User entered comment** and include the research you conducted to determine that the establishment is closed, such as:

- recent Google Street view search
- banner site listings missing from corporate websites
- attempted calls to the establishment resulted in a “number not in service” or “wrong number” message
- Internet search shows the business in permanently closed

You must include **two** independent confirmations that the establishment no longer exists in your comment.

11. At the bottom of the page, select the **Submit** button to continue.
12. The **Confirmation** page will display.
13. Select **OK**; you will be returned to the **Search results** page.

You can select **Cancel** at any time to return to the previous page. If you choose this option, your actions will not be saved.

Information – Requests to close an establishment profile are reviewed by the ORA support desk.

When a review of a request is in progress, the search results will display a note in the **Actions** column showing that there is a pending closure request for that establishment.

Section 5: Devices

This section describes the steps to perform various actions in ORA related to devices, including the following:

- view device information, including the device’s examination and transfer history
- add, delete, deactivate and reactivate a device profile
- transfer a device between establishments and cancel a device transfer
- update a device profile

Unless stated otherwise, these actions must be completed as part of a work order.

Information – Changing device information

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

The **Date of last update** field indicates the calendar date of the change. The **Last updated by** field indicates the user that made the change.

5.1 View a device profile

The details of a device can be viewed before creating a work order or initiating a device transfer. Device details, such as the device capacity and components as well as the device notes are not visible on the **View establishment profile** page. However, you can access the device profile, which includes the device’s transfer and examination history, from that page.

From the **View establishment profile** page:

1. Go to the **Active devices** tab (default tab).
2. Locate the device you wish to review.
3. Select the **View device profile** icon in the **Actions** column.
4. The device profile will display:
    - Scroll down to the **Components** section to view the active components associated with the device, including their approval number, description and status.
    - Scroll down to the **Device transfer history** section to view the device transfer number, the receiving and sending establishments, the date the transfer occurred and the transfer status.
    - Scroll down to the **Device examined on certificates** section to view the examination history of the device at the establishment (this section is visible to MC users only).
5. To exit, select the **Return to establishment profile** link at the bottom of the page.

5.2 Add a device profile

You may add a device profile at **Step 2: Prepare work order** by selecting the **Add new device** button located above the legend. Refer to the Device manual for more information about the device information fields.

Information – Only add profiles of devices being initially examined.

The profile of any device that has previously been examined is to be transferred to the establishment in ORA. If you cannot find the device profile, contact the ORA support desk for assistance.

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

1. Enter the device's serial number in the **Serial number** field (required).
2. Select **Next** to proceed; otherwise, select **Cancel** to discontinue and return to the work order.
3. If the serial number you entered is similar to that of a device that is already listed in the establishment profile (whether in the **Active devices** or **Inactive devices** tab), you will be prompted to review the device listing.
4. If the serial number is listed, select **Update device** to review the device details.
5. The **Serial number** field will be prepopulated with the serial number you entered on the previous page; however, if you notice an error, correct it.
6. Complete the **Approval number** field (required).
    - The number must consist of a prefix followed by four digits (e.g. AM-1111).
    - Search the Notice of approval database to find approval numbers.
7. Complete the **Secondary serial number** field, if applicable.
8. Complete the **Secondary approval number** field, if applicable.
9. Complete the **Device type** field (required).
10. Complete the **Trade subsector code** field (required).
11. Complete the **Capacity** field (required).
12. Complete the **Unit** field (required) by selecting the unit of measure that applies to the capacity from the drop-down list.
13. If applicable, complete the **Interval** field (required for mass devices) and the field next to it.
14. Provide any additional details in the **Device notes** field.
15. At the bottom of the page, select the appropriate option:
    - Select **Add and clone** to add the profile of another new device with the same parameters; you'll need to specify the device's serial number.
    - Select **Add** to complete the process and return to step 2 of the work order.
16. If the device has a separate component, select **Add component**:
    - Add the component's serial number in the **Serial number** field.
    - Add the component's approval number in the **Approval number** field.
    - Add a description of the component if needed.

5.3 Delete a device profile

The option to delete a device is only available for a device whose profile has just been added to ORA. You cannot delete a device that has been examined and for which a certificate has previously been issued. A device that has previously been examined is deactivated, not deleted.

If you added a device profile and realize it was a mistake, the profile should be deleted. You can delete a device profile at the **Step 2: Prepare work order** page:

1. Locate the relevant device in the device list (there will be a star icon designating a new device next to the serial number).
2. Select the **Delete device** option found in the **Actions** column.
3. The **Delete device** page will display.
4. Select the **Delete** button if you want to proceed with the deletion; otherwise, select **Cancel** to abandon the deletion and return to the previous page.
5. If you selected the **Delete** button, a confirmation message will display.
6. Select the **Return to Step 2: Prepare work order** link.

5.4 Deactivate a device profile

You can only deactivate the profile of devices that have previously been examined.

If you added a device, but have not yet completed the work order, refer to subsection 5.3 Delete a device profile.

When there are duplicate profiles of the same device at an establishment, contact the ORA support desk for assistance. The ORA support desk will merge the duplicate device profiles to retain the examination history.

Deactivate a device profile

From the **View establishment profile** page:

1. Go the **Active devices** tab (default tab).
2. Select the correct serial number in the active devices list.
3. Select the **Deactivate device** icon in the **Actions** column; the device profile will be deactivated and moved to the **Inactive devices** tab.

Deactivate multiple device profiles

From the **View establishment profile** page:

1. Go the **Active devices** tab (default tab).
2. Select the devices to be deactivated by activating the checkboxes in the **Select** column.
3. Select the **Deactivate selected profiles** option at the bottom of the page; the selected device profiles will be deactivated and moved to the **Inactive devices** tab.

Deactivate device profiles while completing a work order

From the **Step 2: Prepare work order** page:

1. Select the **Deactivate device** icon in the **Actions** column of each device whose profile you wish to deactivate.
2. When your examination list is complete, select **Next** to proceed to the **Step 3: Validate work order** page.
3. The devices selected for deactivation will be displayed in the **Deactivated devices** section of the page.
4. The profiles of these devices will only be deactivated when the completed work order is submitted.
5. A list of deactivated devices will appear on the examination certificate.

5.5 Reactivate a device profile

Inactive devices do not appear in the examination list. In order to reactivate a device profile, you must be at step 2 of the work order process.

1. From the **Step 2: Prepare work order** page, select **Add new device**.
2. Enter the serial number in the **Serial number** field.
3. A warning message that the device may already exist will display.
4. Select **Update device** to reactivate the device profile.
5. Fill in all the required fields (they are preceded by a red asterisk).
6. Update the **Device status** field by selecting the applicable option from the drop-down list.
7. Select **Save** to complete the reactivation process; otherwise select **Cancel** to discontinue the process and return to the **Step 2: Prepare work order** page.

   Note: You can also select the **Save and clone** option to reactivate and add the profile of a second device with the same specifications; however, this is not recommended.

Information – Avoid using the Save and clone option when reactivating device profiles.

Although the option is available, it is recommended to reactivate and add device profiles separately. Cloning a reactivated device profile as part of the same step is not recommended.

Once the device profile is reactivated, the device will appear on the examination list. Refer to the Device manual for more information about devices and examination data fields. Refer to Section 6: Work orders, worksheets and certificates for instructions on completing the work order.

5.6 Transfer devices

When a device moves from one establishment to another, you must update the device location by completing a device transfer. This action will generate a Device Transfer Notice.

Information – Transferring multiple devices

When multiple devices from different sending establishments must be transferred, you must complete a separate transfer for each establishment.

1. Go to the **Dashboard**.
2. Select **Transfer devices**.
3. The **Step 1: Search for receiving establishment** page will display.
4. If you know the establishment ID, enter it in the **Establishment ID** field, then select the **Search** button.
5. If you don't know the establishment ID, select **More search criteria** to enter other search criteria, then select the **Search** button.
6. The **Search results** page will list the establishments that match your search criteria.
    - If the receiving establishment is not listed in the search results, select the link **Is the establishment you are looking for not listed?**
    - Only open establishments are listed in search results.
    - Select **More search criteria** to further refine your search, then select **Search**.
7. In the list of search results, select the **View establishment profile** icon in the **Actions** column, if needed, to confirm the correct receiving establishment.
8. Select the receiving establishment in the list of search results by activating the radio button in the **Select** column next to the establishment ID.
9. Select **Next** to continue; otherwise, select **Cancel** to discontinue the transfer and return to the dashboard.
10. After selecting **Next**, the **Step 2: Search for devices** page will display.
11. You can choose to stay on the default **Search by establishment** tab or select the **Search by serial/approval number** tab.
12. If you choose **Search by establishment**:
    i. Enter the sending establishment ID in the **Establishment ID** field or select **More search criteria** to use other search criteria.
    ii. Select the **Search** button.
    iii. The **Search results** page will display.
        - If the sending establishment is not listed in the search results, select the link **Is the establishment you are looking for not listed?**.
        - Select **More search criteria** to further refine your search, then select **Search**.
    iv. Select the sending establishment in the list of search results by activating the radio button in the **Select** column next to the establishment ID.
    v. Select the action you want to take:
        - Select **Previous** to return to the **Step 1: Search for receiving establishment** page.
        - Select **Next** to continue; otherwise, select **Cancel** to abandon the transfer and return to the dashboard.

13. If you choose **Search by serial/approval number**:
    i. Enter the device's serial number in the **Serial number** field (required).
    ii. Enter the approval number in the **Approval number** field. Note: It is recommended to only add the approval number when you need to refine the search results, as some devices have the wrong approval number or the approval number is missing.
    iii. When transferring more than ten devices, select **Add serial/approval numbers** to enter additional serial and approval numbers.
    iv. Select **Search** to continue.
    v. A message will display while the application conducts the search.
14. When the search is complete, the **Step 3: Select devices** page will display.
15. Select the **View device profile** icon in the **Actions** column to review a device profile.
16. Select **Return to step 3: Select devices** when you have finished reviewing the profile.
17. Select the devices to be transferred to the receiving establishment by activating the checkboxes in the **Select** column of the applicable devices.

Information – Transferring non-compliant devices

A blue triangle is displayed next to the serial number of devices that are not in a compliant state.

You can transfer non-compliant devices. The local Measurement Canada district office will receive notification of the transfer.

18. Select **Next** to continue; otherwise, select **Previous** to return to **Step 2: Search for devices** or select **Cancel** to abandon the process and return to the dashboard.
19. After selecting the devices, the **Step 4: Confirm transfer** page will display; a warning at the top of the page will remind you to review and correct the trade sector of each device, if needed, before completing the transfer.
20. Complete the fields in the **Receiving establishment contact details** section (required fields are preceded by a red asterisk).
21. Complete the fields in the **Sending establishment contact details** section.
22. Review the device information below the **Transferred devices** heading.
23. Select the **Update trade sector** icon in the **Trade subsector** field to make changes to the trade sector before completing the transfer.
24. Select the **View** icon from the **Actions** column to view a device profile.
25. The **View device information** page will display.

Information – Transferring a device and trade subsector information

When transferring a device, the trade subsector must be identified. Verify the trade subsector before completing the transfer.

Changes to the trade subsector may affect a device's next examination due date.

26. Activate the checkbox next to the mandatory acknowledgement to confirm the information entered in step 4 is correct.
27. At the bottom of the page, select **Complete the transfer** to continue; otherwise, select **Previous** to return to the previous step or select **Cancel** to abandon the transfer and return to the dashboard.
28. After selecting **Complete the transfer**, the **Confirmation** page will display.
29. Once ORA has completed the transfer, select **View status** to view a summary of the transfer.

When the transfer is completed, you can access the device transfer notice in your **Message centre** and in the **Notices** tab of the **View establishment profile** page of the sending or receiving establishment (select the **View** icon to review the notice).

5.7 Cancel a device transfer

If you need to cancel a device transfer, contact the ORA support desk by email. Include the details of the device transfer (i.e. serial number, sending establishment, receiving establishment) or a copy of the device transfer notice in the email. When the cancellation is completed, you will get a confirmation by email.

5.8 Update device details

You can only update device details while completing a work order, at the **Step 2: Prepare work order** page. There are options on this page that allow you to make changes to device information fields or the status of a device.

Update the status of a device

To change the status of a device from active to inactive or vice versa, select the appropriate icon next to the **Update device** icon in the **Actions** column:

- Select the **Deactivate device** icon to deactivate the device profile.
- Select the **Reactivate device** icon to reactivate the device profile.

Update the status of multiple devices

To change the status of multiple devices at once:

1. Activate the checkboxes in the **Select** column next to the serial number of the devices you wish to update.
2. Select the **Deactivate selected profiles** option located below the device list on the right-hand side.

To reactivate device profiles that were just deactivated:

1. Activate the checkboxes next to the serial numbers of the applicable devices.
2. Select the **Reactivate selected profiles** option located below the device list next to the **Deactivate selected profiles** option.

Update the device information fields

To update the device information fields:

1. Select the **Update device** icon in the **Actions** column of the device whose information you wish to update.
2. The **Device information** fields will display.

Information – Missing device information

The profile of older devices may be missing some mandatory information. The fields preceded by a red asterisk (*) may not have been required at the time the device was last examined. To complete the update, you must ensure the relevant information is entered in all required fields.

3. Review the **Serial number** field and correct the number if needed.

Warning – Be cautious when updating serial numbers.

Only update this field to correct an error in the serial number (e.g. the number displayed in ORA starts with 1T7, but the number on the device information plate starts with 1Y7, or the digit “8” was incorrectly entered as the letter “B”). Do not update this field to change the entire serial number.

4. Review all the other fields in this section to ensure the information is correct and update them if needed. All the required fields must be completed.
5. To add a component or update the component information:
   - Select **Add component** to add a component to the device profile.
   - Select the **Update component** icon in the **Actions** column of the applicable component to update the component information.
6. At the bottom of the page, select the action you wish to take:
   - Select **Save** to save the changes and return to the **Step 2: Prepare work order** page.
   - Select **Save and clone** to save the changes and add a second device with the same parameters.
   - Select **Cancel** to return to the **Step 2: Prepare work order** page.

Section 6: Work Orders, worksheets and certificates

This section describes the steps to complete work orders as well as device examination worksheets and certificates. These processes have been grouped together because of the inherent links between them, as worksheets and work orders are used to generate certificates.

6.1 Work orders

This section explains all the steps for completing a work order in ORA, such as selecting devices for examination, recording device examination results and viewing open work orders (i.e. work orders that are in progress and have been saved).

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

Work order navigation

Common actions are available at the bottom of each page of the work order process:

- Select the **Previous** button to return to the previous step (not available at step 1).
- Select the **Next** button to continue to the next step of the work order (not available at step 5).
- Select **Save and exit** to save the data entered and return to the dashboard.
- Select **Cancel** at any time to discontinue the work order process; any data you entered or changed will not be saved.
- Select **Delete work order** to permanently delete the work order and any data you entered.

To access a saved work order again later, go to the dashboard and select **View open work orders**.

Warning – Do not use your Web browser's forward and back buttons.

When navigating in ORA, you must use the **Previous** and **Next** buttons at the bottom of each page. Failure to do so can lead to errors.

Step 1: Create work order

There are several ways to start a work order. The **Create work order** option is available:

- from the **Dashboard;**
- in the **Actions** column on the **Search results** page;
- at the bottom of the **View establishment profile** page;
- on the **View open work orders** page;
- after adding an establishment profile on the **Confirmation** page.

Information – A work order can only be created if the establishment has an active profile in ORA.

Refer to the Section 3: Search of this manual for information on searching for an establishment. Refer to the Section 4: Establishments of this manual for information on adding an establishment profile in ORA.

To start a work order from the dashboard:

1. Select **Create work order**.
2. The **Create work order** page will display; below the **Search for an establishment** heading, enter your search criteria in the appropriate fields.

3. Select **Search** at the bottom of the page.
4. The search results will display the profiles of matching establishments; refine your search if needed to limit the results.
5. Locate the establishment in the search results and select the **Create work order** icon in the **Actions** column.

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

If you are conducting a commodity examination, you will need to

refer to the Commodities manual for the step-by-step instructions for creating a commodity work order in ORA.

6. The **Device examination** page will display.
7. Review the information in **Establishment details** section.
8. Select the **Update** button to make changes to the details fields.

Critical – Has there been a change of ownership?

Updates can be made to correct establishment details, such as the address and banner, but not ownership information. For more information, refer to Section 4: Establishments.

9. When you have completed the update, select **Save** to save the changes and return to the previous page; otherwise, select **Cancel** to discontinue.

Information – ASP contact information section (or Measurement Canada office information section for MC users)

This section indicates the organization or MC office that is tied to the ORA user profile of the recognized technician or inspector performing the examination. You cannot change this information in the work order. The information will also appear on the Device Examination Certificate.

10. Enter the date in the **Examination date** field.
11. If the **Recognized technician ID** field (or **Inspector ID** field if you are an MC inspector) is not prefilled, enter your ID number or, if you are authorized to complete a work order on behalf of a recognized technician or an inspector, enter their ID number in this field or use the **Select from list** link to search for the applicable number.
12. If your organization has an internal numbering system for work assignments, enter the number in the **Work order / reference number** field; if you do not have a work order number, ORA will automatically generate a reference number in this field.
13. At the bottom of the page, choose the action you wish to take:
    - Select **Next** to continue to step 2 of the work order.
    - Select **Save and exit** to save your work order and return to the dashboard.
    - Select **Cancel** to discontinue the work order process and exit the page.

- Select **Delete work order** to permanently delete the work order.

Step 2: Prepare a work order

In this step, you will build your examination list and ensure it includes all the devices you are examining. Refer to Section 5: Devices of this manual for additional information about each function mentioned below.

1. Select the **Add new device** button located above the legend to add the profile of a device used at the establishment that is not already listed or to reactivate an inactive device's profile.

Information – The devices listed depend on your scope and employer.

- ASP users: only the devices within the scope of the recognized technician specified for the examination will be listed.
- MC users: all active devices for the establishment will be listed.

2. In the **Select** column, activate the checkbox next to the serial number of each device you want to add to your examination list.
3. Make any additional changes as required:
    - Select the **Update device** icon in the **Actions** column if you need to review or make changes to the device details.
    - Select the **Deactivate device** icon in the **Actions** column to deactivate the profile of a device that is no longer used in trade at the establishment.
    - Select the **Deactivate selected profiles** link below the list to deactivate multiple devices.
    - Select the **Reactivate selected profiles** link below the list to reactivate multiple devices.
4. After you have made the required changes, activate the checkbox in the **Select** column next to the serial number of each device for which you are entering examination results.
5. At the bottom of the page, choose the action you wish to take:
    - Select **Next** to continue to step 3 of the work order.
    - Select **Save and exit** to save your work order and return to the dashboard.
    - Select **Cancel** to discontinue the work order process and exit the page.
    - Select **Delete work order** to permanently delete the work order.

Step 3: Validate a work order

In this step, you will review and confirm the list of devices you have selected for examination and any devices to be deactivated.

1. Select the **Update device** icon in the **Actions** column to make changes to the details of a device listed.
2. Reconfirm the examination date indicated in the **Date of examination** section.

Information – Missing information warning

The validation of data performed while you navigate within a work order can cause a “missing information” warning to appear. The details of what is missing are listed in the warning. Refer to subsection 5.8: Update device details of the manual for information about updating devices.

3. At the bottom of the page, choose the action you wish to take:
   - Select **Next** to continue to step 4 of the work order.
   - Select **Save and exit** to save your work order and return to the dashboard.
   - Select **Cancel** to discontinue the work order process and exit the page.
   - Select **Delete work order** to permanently delete the work order.

Step 4: Report examination results

In this step, you will enter the examination results for each device in the examination list. If you need to make changes to the examination list or update device details, refer to the previous steps.

1. On the left side of the page, the serial number of each device you have selected for examination is listed in the **Examination list**. On the right side of the page, in the **Device information** section, the details of the device whose serial number is indicated by a green arrow in the **Examination list** will be displayed. If you want to enter the examination results of a different device, select the serial number of the device in the **Examination list**.

Information – View information on P4 and F4 examination types

Measurement Canada users will see the **ASP certificate number**, **Recognized technician ID** and **Physical standard type** fields that the recognized technician completed when entering the results of a product audit (P4) or follow-up (F4) examination.

2. Complete all the required fields (preceded by a red asterisk) in the **Device examination results** section by selecting the applicable option from the drop-down list or by entering the results in the field for each device. Note: The fields that are displayed will be different depending on whether a recognized technician or inspector conducted the examination.
3. Select the **Confirm examination results** button after entering the examination results for each device in your examination list.
4. If there are multiple devices in your examination list whose examination results are the same, you can select the option **Confirm examination results and clone**. When you use this option, the next device in the examination list is displayed with the same examination results as the previous device, but the **Result** field must be completed manually for each device.

   For more information about the examination data fields, refer to the Device manual.

Information – Comments field

In the **Comments** field, enter any necessary information pertaining to the examination of the device. The comments will appear at the bottom of the Device Examination Certificate. When there are comments for multiple devices, each comment on the certificate will be preceded by the number that corresponds to the device number displayed under the **Examined devices** list.

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

5. When you have entered the examination results for all devices, a confirmation message that you are finished will display.
6. If you need to change information pertaining to the device examination, select the device serial number in the **Examination list** on the left of the page.
7. Read and activate the checkbox for the attestation statement regarding standards with expired certificates. Failure to do so will prevent you from proceeding to step 5 and submitting the work order.
8. At the bottom of the page, choose the action you wish to take:

- Select **Next** to continue to step 5 of the work order.
- Select **Save and exit** to save your work order and return to the dashboard.
- Select **Cancel** to discontinue the work order process and exit the page.
- Select **Delete work order** to permanently delete the work order.

Step 5: Confirm and submit a work order

The last step of the work order process allows you to do a final review of the examination results and the contact information for the certificate delivery.

If you need to make changes to previously selected or updated information, return to the applicable steps of the work order process.

1. Select **Update examination results** to make modifications to the examination results of the devices listed. In the **Certificate delivery method** field, select “email” or “mail” from the drop-down list.

Information – Certificate delivery

If the establishment does not wish to provide an email address, select the “mail” option (the email address ORA-ADEL@ised-isde.gc.ca will appear in the field) and the ORA support desk will mail the certificate to the establishment.

2. If two recipients need a copy of the certificate, select the **Add another email address** link to the right of the **Email** field.
3. In the second email address text box that will display, enter the email address of the other recipient.

Information – Sending a certificate to two email recipients

When you send a copy of the certificate to a second recipient at the establishment, the second email address is specific to the certificate and is not saved to the establishment profile unless you activate the **Save to establishment profile** checkmark.

4. To receive a copy of the certificate by email, activate the checkbox **Send me a copy at**.
5. Complete the **Language preference** field.

Warning – If you choose the wrong language, you will have to update the certificate and reissue it.

Double-check to make sure you chose the correct language to avoid having to reissue the certificate. Resending the certificate will not correct the language.

6. In the **Overall examination comments** field, enter comments that pertain to all the devices examined; any information entered in this field will appear on the Device Examination Certificate.

Critical – The establishment ID, examination date and recognized technician ID or inspector ID cannot be modified once a work order is submitted.

At this stage, if you notice that the recognized technician ID or inspector ID or the examination date is incorrect, select the **Previous** button to return to prior work order steps and update the relevant fields.

If you notice that the establishment ID is incorrect before completing the work order, select the **Cancel** button, then select **View open work orders** from the **Dashboard** and delete the incorrect work order.

If you issue a certificate with the wrong recognized technician ID or inspector ID or the wrong examination date, you must contact the ORA support desk.

If you issue a certificate to the wrong establishment, you must contact the ORA support desk to have the certificate deleted.

Information – Preview feature

After completing the **Details of establishment contact person** section, select the **Preview Device Examination Certificate** link located to the right of the **Email** field to see what the certificate will look like with the current data.

In preview mode, the certificate is displayed with a “test” watermark over the establishment details section to indicate that the certificate has not been submitted.

Information – Download Device Examination Worksheet

After completing the **Details of establishment contact person** section, select the **Download Device Examination Worksheet** link located to the right of the **Email** field to view the examination data entered in the work order.

This worksheet can be saved as a reference copy of all of the data fields completed in the work order.

7. At the bottom of the page, choose the action you wish to take:
   - Select **Save and exit** to save your work order and return to the dashboard.
   - Select **Cancel** to discontinue the work order process and exit the page.
   - Select **Delete work order** to permanently delete the work order.
8. To complete the work order, you must acknowledge and agree to the Online Reporting Application terms and conditions of use.
9. Select **Submit** to submit the completed Device Examination Worksheet to Measurement Canada.
10. The **Confirmation** page will display.
11. Select **OK** to return to the dashboard.

6.2 View open work orders

This section explains the steps to view, modify and delete open work orders.

If you download a prefilled examination worksheet or save and exit while completing a work order step, the work order will be saved in the **Open work orders** page. All open work orders associated with your account can be accessed from the dashboard.

1. Go to the **Dashboard**.
2. Select View open work orders.
3. The **Open work orders** page will display.
4. Use the **Filter items** option or the sort arrows to change the display.
5. Select the action you wish to take in the **Actions** column:
   - Select the **Edit work order** icon to continue completing the work order at the step where it was last saved.
   - Select the **Delete open work order** icon to delete the work order if it’s no longer needed.

Warning – The “Delete open work order” icon is not available for work orders that are reopened.

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

You must either complete and resubmit the work order (i.e. reissue the certificate) or contact the ORA support desk to request the work order be closed (i.e. to revert the data back to the issued certificate).

6. Select **New work order** at the bottom of the page if you need to start a new work order.

6.3 Device examination worksheets

This section describes how to download a device examination worksheet when you want to record the device’s examination results on paper and how to upload a completed worksheet.

The following options are available in ORA:

- download a prefilled worksheet from an open work order
- download a blank worksheet from the dashboard
- upload a completed worksheet from the dashboard

Download a prefilled worksheet

You can download a prefilled worksheet only if you have already created a work order. This option is available at **Step 1: Create work order** and **Step 3: Validate work order** of an open work order.

Information – It's recommended to download a worksheet that contains the establishment and device details.

It is recommended that you download a prefilled worksheet at step 3 of the work order process, once all the devices have been added to the examination list. This will ensure the worksheet contains both the establishment details and those of the devices selected for examination.

This recommendation does not apply if you are doing an initial examination.

Download a prefilled worksheet containing only the establishment details

From the **Step 1: Create work order** page:

1. Select the **Download Device Examination Worksheet** link above the **Establishment details** section, on the right.
2. On the resulting page, select **Download** to proceed with the download, then select from the options available to you; otherwise select **Cancel** to discontinue and return to the previous page.

Refer to Step 1: Create work order for instructions on creating and saving a work order.

Download a prefilled worksheet containing the establishment details and device information

From the **Step 3: Validate work order** page:

1. Select the **Download Device Examination Worksheet** link above the **Selected devices** section, on the right.
2. On the resulting page, select **Download** to proceed with the download, then select from the available options; otherwise select **Cancel** to discontinue and return to the previous page.

Refer to Step 2: Prepare work order for instructions on preparing a work order and selecting devices.

Information – Once you have downloaded a worksheet, you can view it later in the Open work orders page.

Download a blank worksheet

You can download a blank worksheet to manually record the examination results. However, if you select that option, you cannot use the worksheet to upload the examination results.

Warning – You still need to complete all the steps of the work order process when you choose to download a blank worksheet.

You can upload examination results from a completed worksheet only if you selected the option to download a prefilled worksheet at step 1 or step 3 of the work order process.

From the **Dashboard**:

1. Select the **Download blank Device Examination Worksheet** link.
2. If you want your name and ID to appear on the worksheet, fill out the **Recognized technician ID** field (or the **Inspector ID** field for MC users) or, if you are authorized to submit examination results on behalf of a recognized technician or an inspector, enter their ID in this field or use the **Select from list** link to search for the applicable ID.
3. On the resulting page, select **Download** to proceed with the download, then select the options available to you; otherwise, select **Cancel** to discontinue and return to the previous page.

Upload a completed worksheet

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

From the **Dashboard**:

1. Select the **Upload completed worksheet** link.
2. Select the **Choose File** button.
3. In the file search window that will display, navigate the folders to find and select the relevant file, then select **Open**.
4. Ensure the file name shows in the **File name** text box, then select **Upload**; otherwise, select **Cancel** to discontinue.
5. If your worksheet contains an error, an error message will display indicating the reason the worksheet cannot be uploaded.

Information – Types of worksheet errors

There are two types of worksheet errors:

- Errors that prevent the worksheet from loading.
- Errors that must be fixed before the work order can be submitted. When an error is flagged, the message will indicate what information is missing or incorrect. You must fix the errors to proceed.

6. When the completed worksheet is uploaded successfully, you will receive a confirmation message to that effect.

7. Select the action you wish to take:
   - Select **Next** to proceed to step 5 of the work order process.
   - Select **Cancel** to return to the dashboard; the uploaded worksheet will be saved to the **Open work orders** page.

For instructions on completing the work order process, refer to subsection 6.1: Work orders.

6.4 Device examination certificates

This section explains how to resend, modify, update and reissue a device examination certificate.

A certificate is issued when a work order is completed or a completed worksheet is uploaded to ORA. At times, a certificate needs to be resent to an establishment or updated and reissued because it contains an error (e.g. the wrong email address for the establishment was entered).

If a certificate was issued to the establishment in the wrong language, resending the certificate will not correct the language. The certificate must be reissued to the establishment in the correct language. Refer to the Modify, update or reissue a certificate section for additional information.

Resend a certificate to an establishment

From the **Message centre:**

1. In the **Notifications** tab, find the relevant device examination certificate notification.
2. Select the **View message** icon in the **Actions** column of the notification.
3. Select the **View a copy of the Device Examination Certificate** link at the bottom of the page.
4. The **Device Examination Certificate** page will display.
5. At the bottom of the page, select the **Resend certificate** button.
6. The **Resend Device Examination Certificate** to establishment page will display.
7. Review and update the information in the **Details of establishment's contact person** section, as needed.
8. When you have made the necessary corrections, select **Resend certificate** at the bottom of the page.
9. You will receive a confirmation that the certificate has been resent.

From the **View establishment profile** page:

1. Select the **Certificates** tab, then find the relevant certificate number from the ones listed.
2. Select the **View certificate** icon in the **Actions** column of the row where the certificate number is indicated.
3. The **Device Examination Certificate** page will display.

4. At the bottom of the page, select the **Resend certificate** button.
5. The **Resend Device Examination Certificate to establishment** page will display.
6. Review and update the fields in the **Details of establishment's contact person** section as needed.
7. When you have made the necessary corrections, select **Resend certificate** at the bottom of the page.
8. You will receive a confirmation that the certificate has been resent.

Modify, update or reissue a certificate

You can modify and update a certificate for up to one year, 365 days, from the examination date.

Warning – You cannot change the examination date yourself.

If the examination date is wrong, follow these steps:

1. Follow the instructions below to modify and reissue the certificate.
2. Save the open work order.
3. Email the ORA support desk and provide the correct date of examination.
4. The ORA support desk will send a confirmation email when the date has been corrected in ORA.
5. From the dashboard, select **View open work orders**.
6. Make any other necessary updates to the examination data.
7. Resubmit the work order to generate the corrected certificate.

Consider the following questions before updating the examination results:

- Does this update change the overall result of the examination?
- Does this update change the next examination due date (NEDD)?
- Does this update change the serial number of a device?

If you answered yes to any of these questions, it may be more appropriate to re-examine the device. For additional information about recording device examination results, refer to the Device manual.

Modify and reissue the certificate

You can access a certificate from the **Message centre** or the **View establishment profile** page in order to make changes to it.

Information – Updated device examination certificates are only generated when the changes made affect the data displayed on the certificate.

Changes made to fields such as the examination results, trade sector or comments will generate an updated version of the examination certificate. Changes made to fields such as seal status and physical standard ID will not generate an updated version of the examination certificate as these fields do not affect the data displayed on the certificate.

Information – Reissued certificate numbers

When an examination certificate is reissued, a reissue number will be added to the end of the original certificate number (e.g. 10038318 will become 10038318-1).

From the **Message centre**:

1. In the **Notifications** tab, find the relevant device examination certificate notification.
2. Select the **View message** icon in the **Actions** column of the notification.
3. To view the certificate, select the **Device Examination Certificate** link at the bottom of the page.
4. The **Device Examination Certificate** page will display.
5. At the bottom of the page, select the **Update** button.
6. In the resulting **Confirmation of update** page, activate the checkbox next to the “I agree” statement; otherwise, select **Cancel** to discontinue.
7. If you agreed to the statement, select **Next** to proceed.
8. The **Step 1: Create work order** page will display.
9. Navigate through each work order step and make the necessary corrections (refer to the section of the manual for the pertinent work order step, as needed).
10. To reissue the certificate you must:

    - complete all the work order steps;
    - agree to the ORA terms and conditions of use;
    - submit the updated work order; it will stay in your open work orders if it’s not submitted.

From the **View establishment profile** page:

1. Select the **Certificates** tab, then find the relevant certificate number from the ones listed.
2. Select the **View certificate** icon in the **Actions** column of the row where the certificate number is indicated.
3. The **Device Examination Certificate** page will display.
4. At the bottom of the page, select the **Update** button.
5. In the resulting **Confirmation of update** page, activate the checkbox next to the “I agree” statement; otherwise, select **Cancel** to discontinue.
6. If you agreed to the statement, select **Next** to proceed.
7. The **Step 1: Create work order** page will display.
8. Navigate through each work order step and make the necessary corrections (refer to the section of the manual for the pertinent work order step, as needed).
9. To reissue the certificate, you must:

    - complete all work order steps;
    - agree to the ORA terms and conditions of use;

- submit the updated work order; it will stay in your open work orders if it’s not submitted.

View and download a certificate

From the **Message centre:**

1. In the **Notifications** tab, find the relevant device examination certificate notification.
2. Select the **View message** icon in the **Actions** column of the notification.
3. In the resulting page, select the **Device Examination Certificate** link to view a copy of the certificate.
4. The **Device Examination Certificate** page will display.
5. Select the **Download Device Examination Certificate** link on the top right above the **Examination date** section; otherwise, select the **Return to notification** button at the bottom of the page.
6. If you chose to download the certificate, the **Download Device Examination Certificate: [certificate number]** page will display.
7. From this page, choose the action you wish to take:
    - Select the **Download** button to obtain a PDF copy of the certificate.
    - Select the **Return to Device Examination Certificate: [certificate number]** link to return to the previous page.
    - Select the **Cancel** button to discontinue and return to the previous page.

From the **View establishment profile** page:

1. Select the **Certificates** tab, then find the relevant certificate number from the ones listed.
2. Select the **View certificate** icon in the **Actions** column of the row where the certificate number is indicated.
3. The **Device Examination Certificate** page will display.
4. Select the **Download Device Examination Certificate** link on the top right above the **Examination date** section to continue; otherwise, select the **Return to establishment profile** button at the bottom of the page.
5. If you chose the download option, the **Download Device Examination Certificate: [certificate number]** page will display.
6. From this page, choose the action you wish to take:
    - Select the **Download** button to obtain a copy of the certificate in PDF format.
    - Select **Return to Device Examination Certificate: [certificate number]** to return to the previous page.
    - Select the **Cancel** button to discontinue and return to the previous page.

Section 7: Reports

This section describes the steps for selecting and creating a report, including report format options.

The reports available in ORA can be used to extract data on establishments, devices and examination details. The reports are key tools for planning examinations, monitoring examination details as well as reviewing and analyzing data.

Note: Reports are not accessible to the ASP Finance user type.

Information - There is a size limit of 65,000 rows per report.

Reports which exceed the size limit will generate an error message. To avoid exceeding the limit, refine your search criteria. Refer to subsection 7.4: Report search criteria fields for more information.

7.1 Select a report

There are three different reports that are accessible to all ORA users. Review the description of each report to determine which one best suits your needs:

- **Device Report**: This report provides a list of establishments and their devices that match your search criteria. Select this report to:
  - view all of the devices at an establishment or a specific device type;
  - find out which devices or device types are in a specific geographic area;
  - obtain the number of devices of a particular device type within a trade sector;
  - see what devices are within a particular postal code or city;
  - find all current and previous entries for a specific device (for this, you must activate the **Include inactive devices** checkbox in the search criteria).
- **Detailed Examination Report**: This report provides the most comprehensive and detailed information on completed examinations. Each device appears on a separate line, and data from all the fields in the work order as well as the standard information and comments are included in the report. Select this report to:
  - review examination data entered by an organization or a recognized technician;
  - generate a list of examinations performed by an inspector, a recognized technician or an organization within a specific timeframe;
  - review examinations for a specific device type, geographic area or establishment;
  - audit device examination details.

  Note: ASP users are only able to obtain data on examinations performed by their organization.

- **Examination Report**: This report provides establishment information and basic examination data. Select this report to:

    - view the certificates that were issued by a recognized technician or organization within a specific timeframe;
    - view a particular establishment's information;
    - review a recognized technician's work to ensure all examination results have been recorded.

  Note: ASP users are only able to obtain data on examinations performed by recognized technicians within their organization.

There are two additional reports that are only accessible to Measurement Canada users:

- **Overdue Device Report**: This report provides a list of establishments and their overdue devices. Select this report to:
    - generate a list of devices in the mandatory trade sectors which have an overdue next examination due date;
    - review a list of devices in all trade sectors that are overdue for repairs;
    - obtain a list of devices that are coming due for examination.
- **Enforcement Action Report**: This report lists the enforcement actions that occurred within the specified report period as well as the status of each file. Select this report to:
    - generate a list of enforcement actions and their associated details;
    - find out which enforcement actions are outstanding and need to be addressed;
    - obtain information on areas of potential concern;
    - identify non-compliance trends by banner, trade sector, geographic area or device type that need to be addressed.

7.2 Create a report

1. Go to the **Dashboard**.
2. Select the **Create a report** link.
3. The **Create report** page will display.
4. In the **Report list**, select the **Create** icon in the **Action** column beside the type of report you wish to create (refer to subsection 7.3 Report creation options to determine which report best suits your needs).
5. In the **Report search criteria** section of the resulting page, specify your search criteria in the relevant fields:

- Where there is an **Add** button to the right of the field, you can add additional search parameters for that specific field.
- Where there is no **Add** button, enter text or click into the field or use the tab key to access the field and select from the drop-down list options; repeat this process to add multiple criteria in the field.
- For the **Trade sector** field, you can select a trade sector or individual trade subsectors.

- To remove a criterion, select the **X** beside it.

6. Enter the dates in the **Examination date** and **Next examination due date** fields to further refine the report results if needed.
7. The **Create a large report** box is activated by default. Uncheck the box to generate the report online. Refer to subsection 7.3 Report creation options for more information.
8. In the **Report format** field, select a report output option from the drop-down list:

   - If you select CSV comma delimited for English OS, the report will be generated in English in a text format.
   - If you select CSV semicolon delimited for French OS, the report will be generated in French in a text format.
   - If you select Microsoft Excel 2003+ (*.xls), the report will be generated in a Microsoft Excel spreadsheet format in the language indicated in the **User preferences** section of your ORA user profile.
   - If you select Microsoft Excel 2007+ (*.xlsx), the report will be generated in a Microsoft Excel spreadsheet format in the language indicated in the **User preferences** section of your ORA user profile.

9. At the bottom of the page, select the action you want to take:

   - Select **Create report** to generate the report.
   - Select **Cancel** to exit the page and return to the dashboard.
   - Select **Reset** to clear all the criteria you have entered.
   - Select **Return to report list** to return to the previous page.

7.3 Report creation options

Users have the option to request the creation of a large report that can be downloaded at a later time or a small report that can be generated immediately.

Request the creation of a large report

- This option is selected by default.
- Use this option when requesting a report expected to contain 5,000 to 65,000 rows.
- A message confirming that the report has been submitted will appear on the page.
- While this report is being generated, you can continue to work or request additional reports.
- You will receive a notification in your **Message centre** when the report can be downloaded; select the **Download** link provided in the notification to view the report.

Warning - These notifications are single-use only. Once you have

downloaded the report, the notification will no longer appear in your Message centre.

Request the creation of a small report

- Uncheck the **Create a large report** box to generate a small report that can be downloaded immediately.
- You can use this option when requesting the creation of a report expected to contain fewer than 5,000 rows.
- You must remain on the **Create a report** page until the report is generated.
- If the report exceeds the size limit, an error message will appear. When this happens, use the browser’s back arrow and check the **Create a large** report box to try again.

7.4 Report search criteria fields - Reports accessible to all users

For reports that are accessible to all ORA users, the report search criteria fields are as follows.

	Device Report	Detailed Examination Report	Examination Report
Report search criteria fields			
Establishment ID	✓	✓	✓
Legal or operating name	✓	✓	✓
Banner	✓	✓	✓
City	✓	✓	✓
Province	✓	✓	✓
Postal code	✓	✓	✓
Employee	-	✓*	✓*
Technician	-	✓	✓
Organization	-	✓*	✓*
District	✓*	✓*	✓*
Trade sector	✓	✓	✓
Device type	✓	✓	✓
Product type	✓	✓	-
Serial number	✓	✓	-
Approval number	✓	✓	✓
Examination type	-	✓*	-
Examination date (From and To fields)	✓	✓	✓
Next examination due date (From and To fields)	✓	✓	✓

* denotes fields available to MC users only

You do not have to specify criteria for each field, but you will need to enter some parameters to avoid exceeding the size limit outlined at the beginning of this section. Criteria like a city, province or postal code combined with a device type and/or trade sector can be used. You can also enter one or more recognized technician or inspector IDs and a date range to see what work was performed.

The information displayed in each report differs.

	Device Report	Detailed Examination Report	Examination Report
Report fields			
Certificate number	-	✓	✓
Establishment ID	✓	✓	✓
Work order / reference number	-	✓	✓
Legal name	✓	✓	✓
Operating name	✓	✓	✓
Banner	✓	✓	✓
Address	✓	✓	✓
City	✓	✓	✓
Province	✓	✓	✓
Postal code	✓	✓	✓
Telephone number	✓	-	✓
Contact person	-	-	✓
Email	-	-	✓
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	✓	✓	-
Device status	✓	✓	-
Last examination date	✓	-	-
Next examination due date	✓	✓	-

	Device Report	Detailed Examination Report	Examination Report
Status of establishment	-	✓	✓
Inspector/Technician	-	✓	✓
Device notes	-	✓	-
Factory examined	-	✓	-
Examination date	-	✓	✓
Submitted date	-	✓	-
Number of days	-	✓	-
Component serial number	-	✓	-
Component approval number	-	✓	-
Component description	-	✓	-
Examination type	-	✓	-
Recognized technician ID	-	✓	-
Standard type used by RT	-	✓	-
Seal status	-	✓	-
As Found	-	✓	-
Result	-	✓	-
Standard type	-	✓	-
Standard ID	-	✓	-
Temperature standard ID	-	✓	-
Equipment used	-	✓	-
Device comment	-	✓	-
Overall comments	-	✓	-
Project number	-	✓	-

* denotes fields available to MC users only

7.5 Report search criteria fields - Reports accessible only to MC personnel

For reports that are accessible only to Measurement Canada personnel, the report search criteria fields and the report fields are as follows.

	Overdue Device Report	Enforcement Action Report
Report search criteria fields		
Establishment ID	✓	✓
Legal or operating name	✓	✓
Banner	✓	✓
City	✓	✓
Province	✓	✓
Postal code	✓	✓
District	✓	✓

	Overdue Device Report	Enforcement Action Report
Trade sector	✓	-
Device type	✓	-
Product type	✓	-
Approval number	✓	-
Employee	-	✓
Enforcement action(s) taken	-	✓
Enforcement action number	-	✓
Status of enforcement action	-	✓
Last examined by	✓	-
Examination date (From and To fields)	✓	-
Next examination due date (From and To fields)	✓	-
Date action was taken (From and To fields)	-	✓

You do not have to specify criteria for each field, but you will need to enter some parameters to avoid exceeding the size limit outlined at the beginning of this section. Criteria like a city, province or postal code combined with a device type and/or trade sector can be used.

The information displayed in each report differs.

	Overdue Device Report			Enforcement Action Report
	By device	**By establishment**	**Summary**	
Report fields				
Region	✓	-	-	✓
District	✓	-	-	✓
Trade sub-sector	✓	-	-	-
Device type	✓	✓	✓	-
Device subtype	✓	✓	✓	-
Capacity / Unit of measurement	✓	✓	-	-
Serial number	✓	✓	-	-
Approval number	✓	✓	-	-
Establishment ID	✓	✓	-	✓
Legal name	✓	✓	-	✓
Operating name	✓	✓	-	-
Banner	✓	-	-	✓
Address	✓	✓	-	✓
City	✓	-	-	✓

	Overdue Device Report			Enforcement Action Report
	By device	By establishment	Summary	
Province	✓	-	-	✓
Postal code	✓	-	-	✓
Last examination date	✓	✓	-	-
Next examination due date	✓	✓	-	-
Days overdue	✓	✓	✓	-
NEDD or repair overdue	✓	✓	-	-
Total	✓	✓	✓	-
Enforcement action no.	-	-	-	✓
Escalated	-	-	-	✓
Escalation no.	-	-	-	✓
Date action was taken	-	-	-	✓
Enforcement action relating to	-	-	-	✓
Enforcement action type	-	-	-	✓
Provision(s) contravened	-	-	-	✓
Device type and serial number(s)	-	-	-	✓
Number of devices	-	-	-	✓
Status of enforcement action	-	-	-	✓
Issued to	-	-	-	✓
Details	-	-	-	✓
Follow-up due date	-	-	-	✓
Created by	-	-	-	✓
Date created	-	-	-	✓

Section 8: Authorized service provider fees

Authorized service providers (ASPs) have the ability to pay their accreditation and registration fees in ORA. Only an individual designated as either the ASP finance user or ASP manager can make these payments. The user will need an ORA account.

At this time, only Visa, MasterCard and American Express credit cards are accepted as methods of payment.

8.1 Make a payment

When a payment is required, an automated email is sent to either the ASP finance user or the ASP manager.

To make a payment:

1. Click the link provided to access the ORA login page.
2. Log in to ORA.

3. From the **Dashboard**, select the **Authorized service provider fee** link.
4. The **Payments** page displays a list of unpaid and paid payments. Each payment entry shows the following information:
   - Due date
   - Transaction ID (indicated after payment is made)
   - Payment date (indicated after payment is made)
   - ASP: lists the organization's ID and name (Measurement Canada users only)
   - Region: shows the Measurement Canada region responsible for the ASP (Measurement Canada users only)
   - Fee type: lists the activity for which the fee was charged
   - Total fee before taxes
   - Provincial tax
   - Federal tax
   - Total fee charged including taxes
   - Payment status (i.e. unpaid, paid or pending)
5. Select the **Pay** icon located in the **Actions** column of the unpaid payment.

Critical – Before making a payment, be sure you are ready to proceed.

Once you select **Pay**, you must complete the transaction. Failure to do so will result in an incomplete or pending transaction.

6. The **Proceed with payment** page will display.
7. Select **Proceed to checkout**; otherwise, select **Cancel** to discontinue and return to the **Payments** page.
8. If you selected **Proceed to checkout**, the **Moneris Solutions** page will display.

Warning - Do not use your browser's navigation buttons while on this page.

Using your browser's back button will result in an error and the status indicated in the **Payment status** column will change to "Pending". If the status shows as pending, you must contact the ORA support desk for assistance.

9. Choose a payment method: Visa, MasterCard or American Express.
   - Although Interac Online is displayed as a payment option, it is not currently available.
10. The **Payment Details** fields will display.
11. Enter the credit card information.
12. Select **Process Transaction** to submit your payment.

Critical – Do not select "Cancel Transaction".

Cancelling the payment at this stage will automatically change the status in the **Payment status** column to “pending”. If the payment status is pending, you must contact the ORA support desk for assistance.

13. When the payment is processed, the **Transaction approved** page will display.
14. To obtain a copy of the receipt by email, select **Email receipt**.
15. Select **Continue** to return to the ORA **Payments** page.

8.2 View payment details

On the **Payments** page, the **Payment status** column will now show as “Paid” and the activity listed in the **Fee type** column will be hyperlinked. To view the details of the payment:

1. Select the activity hyperlink; a window will display showing the payment information.
2. Choose an option according to the action you wish to take:
   - Select **Download invoice** to obtain a copy of the invoice.
   - Select **Download receipt** to obtain a copy of the receipt.
   - Select **Close** to exit and return to the **Payments** page.

Section 9: Information and resources

This section lists the various resources available to ORA users and where to access them.

9.1 Information and resources

All ORA related manuals and reference tables can be downloaded from ORA. To obtain a copy of a resource, follow these steps:

1. From the **Dashboard**, select the **Information and resources** link.
2. Locate the document you wish to download. Use the **Filter items** field or column **Sort** function to locate the desired document in the language of your choice.
   Note: If a document is listed twice, refer to the Upload date to determine the most recent version.
3. In the **Actions** column, select the download icon.
4. Follow your browser’s instructions to download and save the file.

9.2 ORA training

[Register for an Online Reporting Application training session]

9.3 Other useful links

Measurement Canada website

Find a notice of approval

Reporting the transfer of ownership of a measuring device

9.4 ORA support desk

Support desk agents are only equipped to answer general questions about using ORA. Technical questions must be directed to your Measurement Canada contact.

Support desk staff are available Monday to Friday, excluding statutory holidays, 7 a.m. to 3 p.m. Eastern time.

There are a few different ways to contact the ORA support desk:

- Email: ora-adel@ised-isde.gc.ca
- Telephone: 1-877-646-7525 or 613-948-8759
- From your ORA account:
  1. Go to your **Message centre**.
  2. On the top right of the **Notifications** tab, select **Compose general message**.
  3. Complete the required fields and provide as much detail as possible to describe your question or issue.
  4. Select **Send** to deliver the message.
  5. An ORA support agent will respond to the message.

Revisions

Effective date	Description of the revisions
August 2025	• Added Microsoft Excel 2007+ (*.xlsx) as a report format option to section 7.2.

Effective date	Description of the revisions
June 2024	• Updated subsections 1.2 and 9.2 to reflect changes to mandatory ORA training. • Added instructions to subsection 1.5 on how to update the user profile in order to automatically receive copies of device examination certificates by email. • Updated subsection 3.1 to include the **Work order / reference number** field in the establishment search criteria. • Added information with respect to secondary email addresses to subsection 4.2. • Updated the instructions in subsection 6.1 for sending a certificate to two email recipients and for receiving a copy of the certificate by email. • Added instructions to subsection 6.1 in reference to the new attestation statement regarding standards used for examinations • Added information to subsection 6.1 regarding the new **Delete work order** button.
January 2024	• Updated section 7 to add a note and make minor changes. • Updated subsection 7.1 to add descriptions of the reports accessible only to Measurement Canada personnel. • Added subsection 7.5 to provide the report search criteria fields for reports accessible only to Measurement Canada personnel.
December 2023	• Updated the instructions for viewing user profiles provided in section 1.6. • Added instructions to subsection 2.2 to reflect changes to how notifications are displayed and managed. • Updated subsection 4.1 to reflect changes to the **View establishment profile** page. • Updated subsection 4.2 to include the **Establishment notes** field and **Transfer devices option**. • Added a critical warning message to subsection 4.4.

August 2023	• Reordered and restructured all sections.
	• Added section numbering.
	• Updated content and instructions to reflect changes to the application.
	• Added two new sections:
	  ◦ Authorized service provider fee
	  ◦ Information and resources

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