



pennsylvania
DEPARTMENT OF DRUG AND
ALCOHOL PROGRAMS

PA WITS

*WITS Basics User
Guide*

Applies to: WITS Version 22.3.0+

Pennsylvania DDAP
Last Updated
November 2023

Pennsylvania DDAP

PA-WITS

The PA-WITS system is used by treatment providers to collect Substance Use Disorder (SUD) data across the state of Pennsylvania to assist DDAP in meeting their primary objective of reporting Treatment Episode Data Set (TEDS) to the Substance Abuse and Mental Health Services Administration (SAMHSA) as required by the block grant. In addition to the data collection for these block grant reporting requirements, PA WITS is also used to help DDAP collect additional clinical and case management data as described in [DDAP's Case Management and Clinical Services Manual](#).

Intended Audience

This general user guide has been prepared for all PA WITS users. Topics covered include basic navigation features, system conventions, screen formations, hints, and login information.

System Requirements

PA WITS is a web-based application accessed through an Internet (web) browser with an Internet connection.

Internet Browsers

PA WITS is compatible with up-to-date versions of most modern Internet browsers such as:

- Microsoft Edge
- Google Chrome
- Mozilla Firefox
- Apple Safari

NOTE: When resetting PA-WITS account credentials, be sure to remove any prior saved Passwords from the browser settings. Failing to do so may cause the browser to substitute the older login info upon hitting "Submit" and the login attempt will fail.

Pop-up Blocker

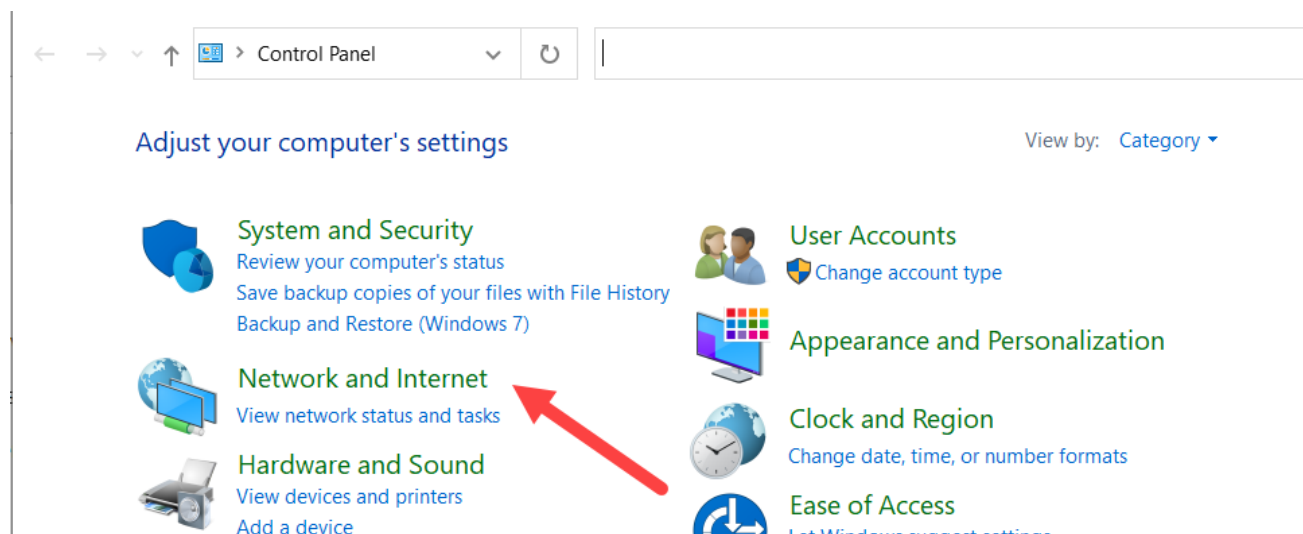
Certain features in PA WITS, such as Snapshot and Scheduler, will open in a separate browser window when selected. Make sure your browser allows pop-ups from PA WITS.

Update Internet Options

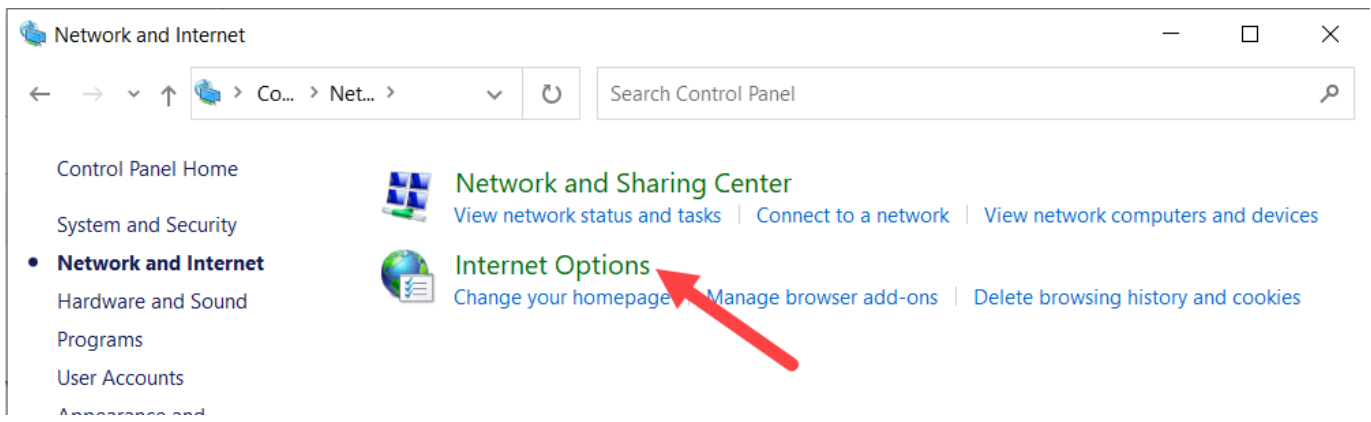
Add PA WITS sites to your browsers **Trusted Sites** list, as shown in the following example.

Microsoft Edge:

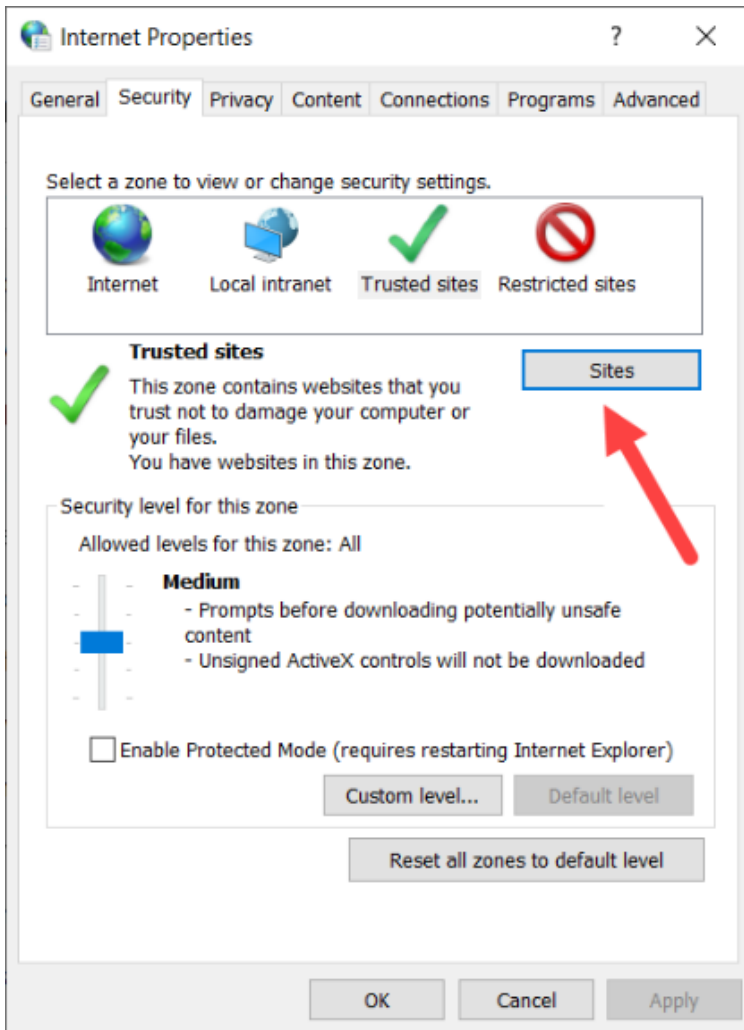
Open the **Control Panel** in your computer and click **Network and Internet**



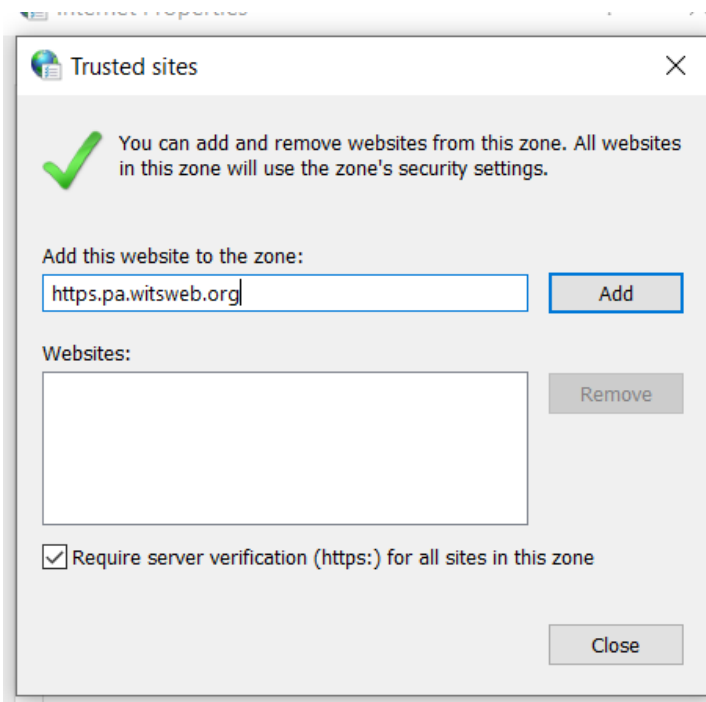
Click **Internet Options**.



Select the **Security** tab, click **Trusted Sites**, and then click the **Sites** button.



On the **Trusted Sites** dialog box, click the **Add** button and then click **Close**.



Customer Resources

PA WITS Training Material Website: Contains links to user guides and other useful system information. https://www.ddap.pa.gov/Training/Pages/DataSystem_Training.aspx

PA WITS Support Structure: Details below. Overview of the PA WITS problem reporting structure that describes the proper procedures to report various types of user issues.

PA WITS Help Desk: Email: RA-DAPAWITS@pa.gov
Phone: 717 736-7459 (M-F 8:00 am–4:00 pm)

PA WITS Production Site: <https://pa.witsweb.org>

PA-WITS Support Structure

This section describes the various levels of the support available to users, and the types of issues each level is responsible for addressing.

Tier 1 Support: Agency/Staff Administrator at SCA or Provider

- Champion PA WITS at your organization
- Create new staff accounts, reset passwords, lock/unlock accounts, change user account permissions.
- Have a solid understanding of WITS screens, business rules, and processes; be able to help users with any usability issue that is covered in PA-WITS training manuals or other available user and system documentation.
- Address user issues during normal operation hours
- Ensure users review and complete the on-demand self-service training at: (https://www.ddap.pa.gov/Training/Pages/DataSystem_Training.aspx). Please note: While the steps in these videos are still accurate for PA WITS functionality wise, the appearance of the screens will be different due to the user interface update.
- Escalate system errors or complex issues to PA WITS Service Desk (Tier 2 Support)

Tier 2 Support: DDAP, PA WITS Service Desk

- Available Monday-Friday, 8 AM – 4:00 PM (except on State Holidays) to answer calls or emails from the SCA or Provider’s Tier 1 support designee (PA WITS Agency or Staff Administrator.)
- Email: RA-DAPAWITS@pa.gov
- Phone: 717-736-7459
- Work with SCA or Provider’s Agency or Staff Administrator to see the issue through to resolution. If the problem cannot be resolved, DDAP will escalate the issue to Tier 3 support.

Tier 3 Support: FEi Systems

The PA-WITS Service Desk will work with the vendor, Fei Systems, to address issues not resolved at the Tier 1 or 2 levels, and to address other system defects or availability issues.

Contents

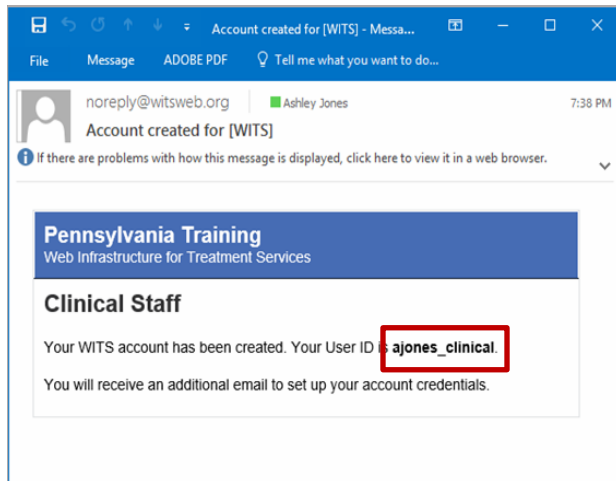
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Part 1: System Access - First Time Logging In

Once your agency administrator has created your account in WITS, you will receive two email messages from noreply@witsweb.org.

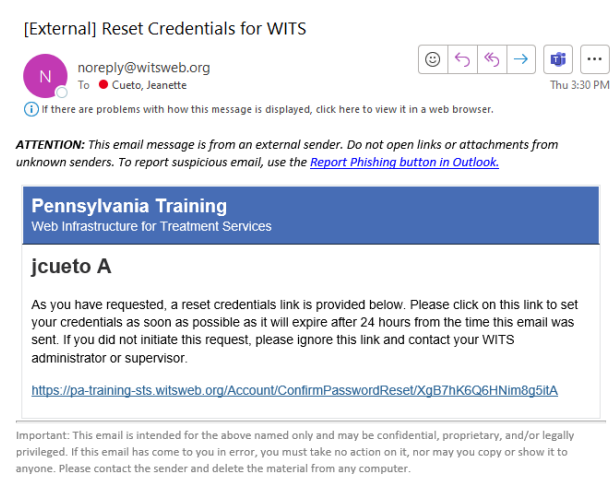
The first email will include your **User ID** and the second email will contain a link to set your log in credentials.

Account Created Email



Locate User ID

Reset Credentials Email



Click the link at the bottom of the window

NOTE: The **Reset Credentials** link will expire 24 hours after the email is sent. If the link has expired, a Facility or Staff Administrator in your agency can reset your account and you will receive another link via email.

1. Open the email with the subject line, "Account created for [WITS]" and locate your **User ID**, you will need it when logging in after setting your credentials.
2. Open the email with the subject line, "Reset Credentials for [WITS]" and click the link. This will open the **Reset Credentials** webpage.
3. On the **Reset Credentials** page, enter the information as shown in the following table.

Table 1-1: Reset Credentials fields.

Field	Description
Display Name	Read-only field displaying your last name and first name.
Email	Read-only field displaying your primary email address.
Security Question	Select a question from the drop-down list. Note: Your Security Question will be used to help reset your credentials if you've forgotten your password/PIN. Please see the " <i>Forgot Password Link</i> " section for more information.
Answer	Type the answer to your selected Security Question. Note: Your answer is <u>case sensitive</u> .

Field	Description
Password	<p>Your Password must contain the following:</p> <div data-bbox="521 191 1101 793" style="border: 1px solid #ccc; padding: 10px;"> <p>Your Password must have</p> <ul style="list-style-type: none"> ✔ at least 12 character(s). <p>And contains at least three (3) of the following:</p> <ul style="list-style-type: none"> ✔ uppercase letters ✔ lowercase letters ✔ numbers ✔ punctuation <p>And does not contain:</p> <ul style="list-style-type: none"> ✔ user ID ✔ dictionary words greater than three letters ✔ first name ✔ last name </div> <p>Note: Your Password and PIN must be different.</p>
Confirm Password	Retype your Password.
PIN	<p>Your PIN must have at least six (6) characters and contain at least three (3) of the following:</p> <ul style="list-style-type: none"> • Uppercase letters • Lowercase letters • Numbers • Punctuation
Confirm PIN	Retype your PIN.

STANDARD WITS

Web Infrastructure for Treatment Services

Reset Credentials

Display Name

Staffmember, Jamie

Email

Val.Hewitt@feisystems.com

Security Question

What month did you get n ▾

Answer

Password

Confirm Password

PIN

Confirm PIN

Save

Cancel

Show Password/Pin

Figure 1-1: First Time Logging In, Reset Credentials screen.

How to Log In

1. Open an Internet browser. The URL for PA-WITS is: <https://pa.witsweb.org>
2. Acknowledge the warning message as shown below and then click **OK**.

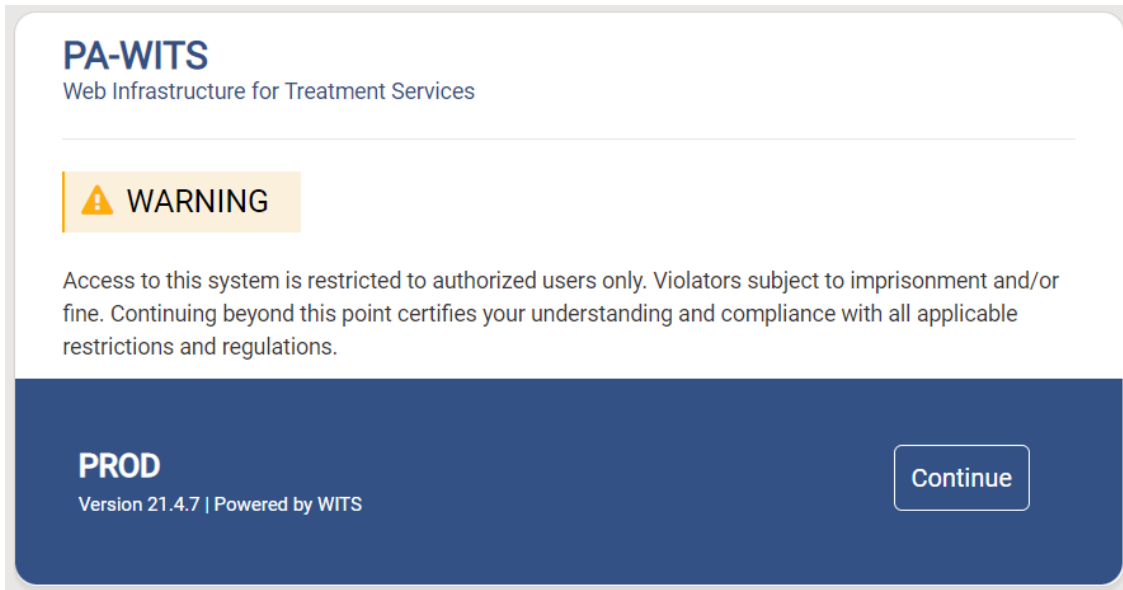


Figure 1-2: Login Warning Message screen.

3. Type your **User ID**, **Password**, and **PIN**, and then click **Login**.

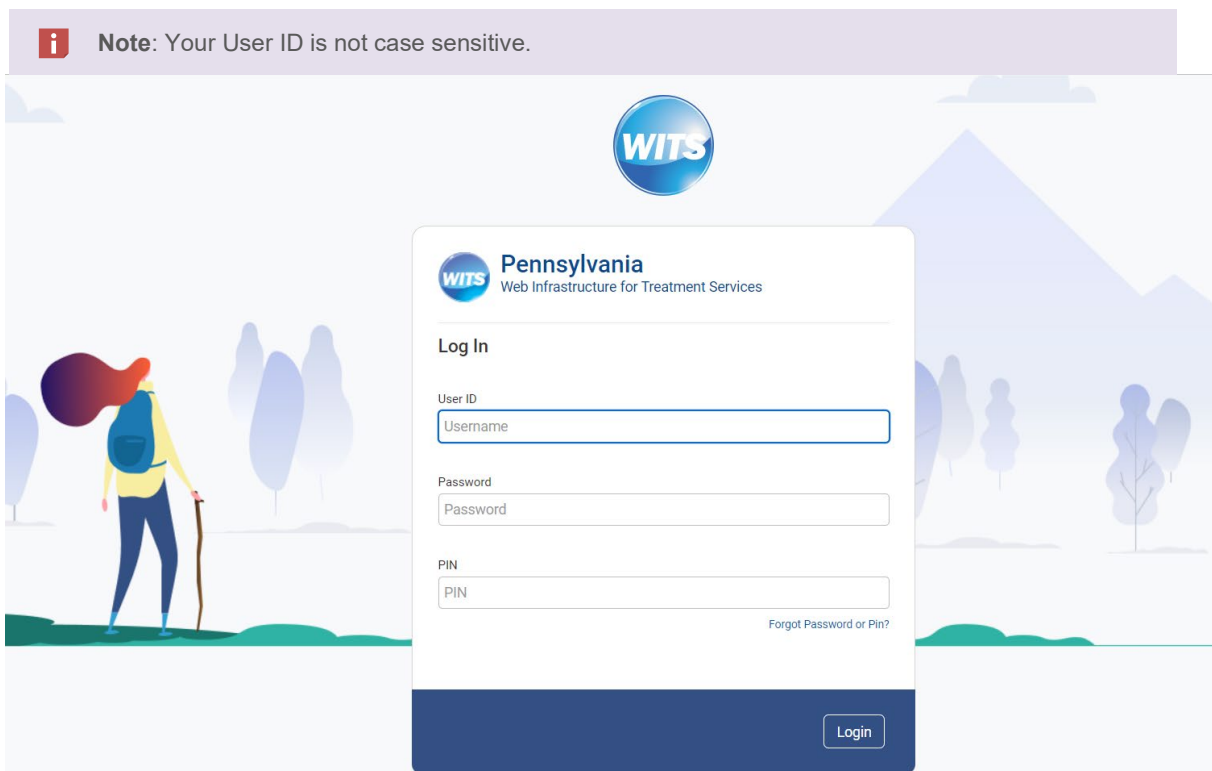


Figure 1-3: Login screen.

Forgot Password Link

Note: Before resetting your login credentials, be sure to remove any prior saved credentials for PA WITS from your browser history. Failing to do so may cause the browser to replace your newly set info with the prior saved info, causing it to fail.

1. If you have forgotten your password, click **Forgot Password** located on the **Login** screen.

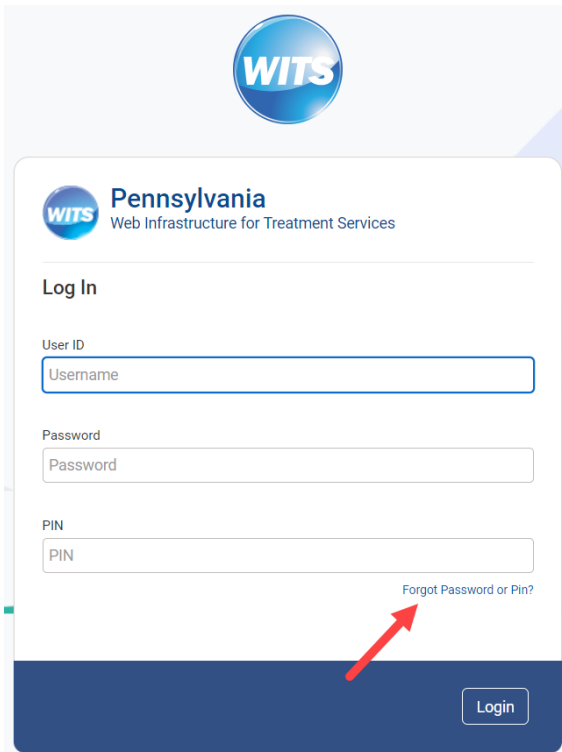


Figure 1-4: Login screen, Forgot Password link.

2. Type your **User ID** and then click the **Submit** button.

NOTE: It is important that you enter ONLY your User ID in the "Username" field. Entering a full email address will cause a failed login attempt and the receipt of a "too many attempts" warning message.

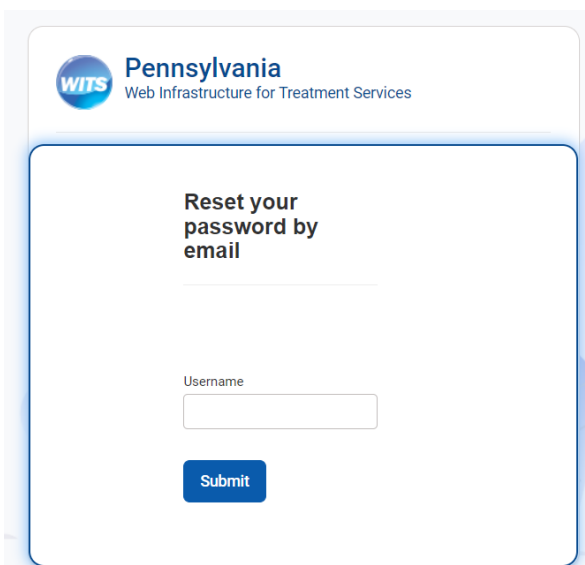


Figure 1-5: Forgot Password screen.

3. Type the answer to your **Security Question** and then click the **Submit** button.

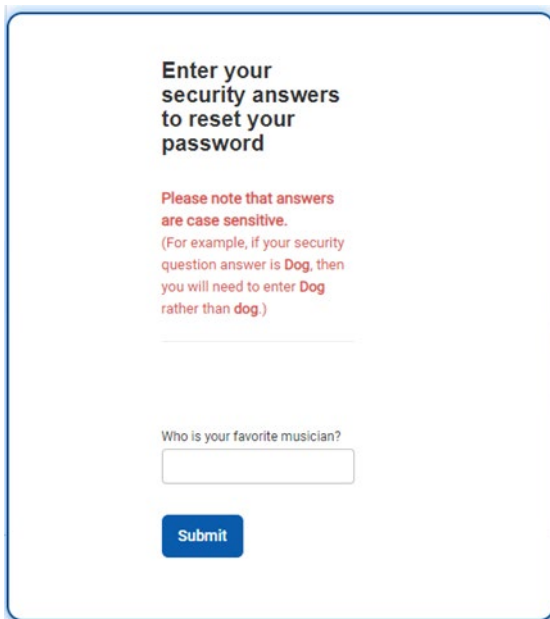


Figure 1-6: Forgot Password screen, Answer field.

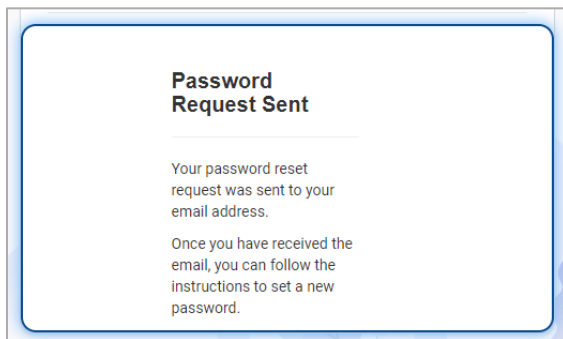
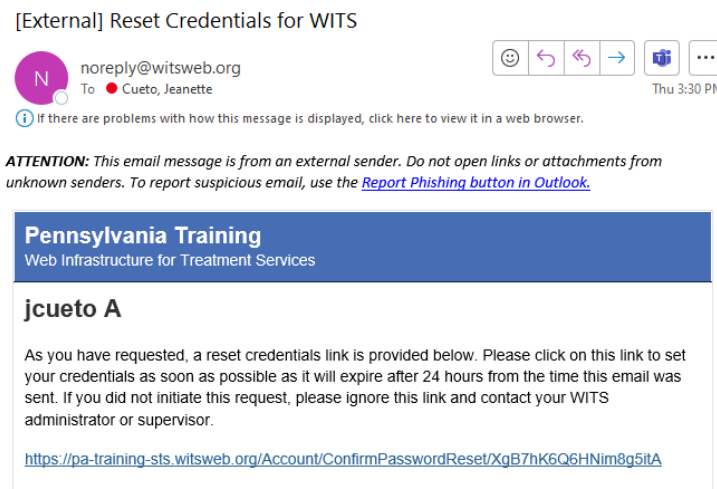


Figure 1-7: Forgot Password, Confirmation screen.

4. An email will be sent to the primary email address for your account with a link to reset your credentials. Please note that this link will expire 24 hours after the email was sent. Click the link provided in the email.



Important: This email is intended for the above named only and may be confidential, proprietary, and/or legally privileged. If this email has come to you in error, you must take no action on it, nor may you copy or show it to anyone. Please contact the sender and delete the material from any computer.

Figure 1-8: Reset Credentials Email

5. On the **Reset Credentials** screen, type your new **Password** and **PIN** then click **Save**.
Please Note: you do not have to re-answer your security question when resetting your credentials.

Reset Credentials

Display Name
Staffmember, Jamie

Email
Val.Hewitt@feisystems.com

Security Question
What month did you get n ▾

Answer

Password

Confirm Password

PIN

Confirm PIN

Save Cancel

Show Password/Pin

Figure 1-9: Reset Credentials screen.

Success

You can now log in to WITS.

Figure 1-10: Reset Credentials, Confirmation screen.

How to Log Out

Remember to log out of WITS at the end of the day and anytime your computer is unattended.

1. On the top navigation bar, click **Logout**.

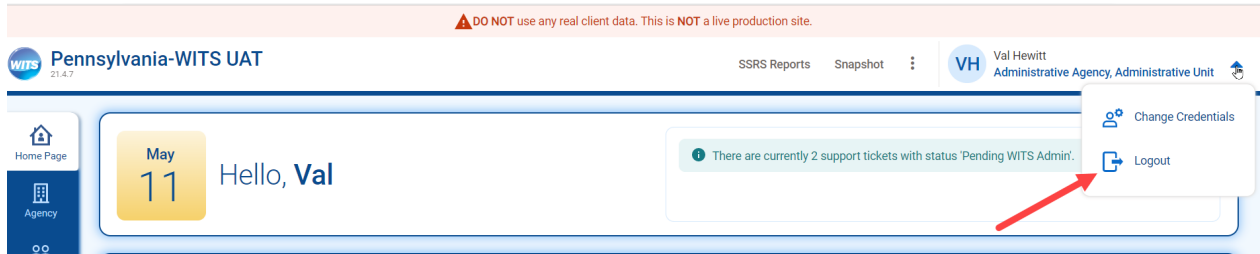


Figure 1-11: Logout button

2. Next, click **Yes** to log out.

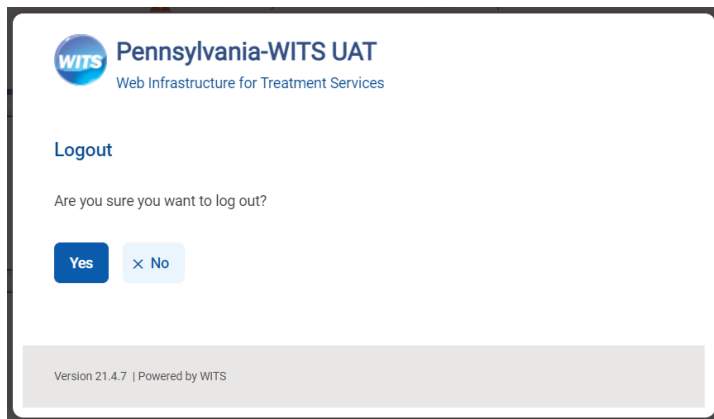


Figure 1-12: Logout confirmation window

Security Features

- WITS will automatically lock an account if you are signed into the system on one computer and then use a different computer to log in to WITS. To prevent this issue, always remember to log out at the end of the day and anytime your computer is unattended.
- Your Password and PIN must be changed every 60 days.
- You have a maximum of three incorrect login attempts before your account will be locked and your Staff Administrator will need to Reset your credentials.
- Your account will be disabled after 60 days if you do not log in.

How to Update your Password and PIN

If you are already logged in to PA WITS, you can change your credentials by following the steps below.

3. On the top navigation bar, click the down arrow to the right of your name. This will open a drop-down menu. Click **Change Credentials**.

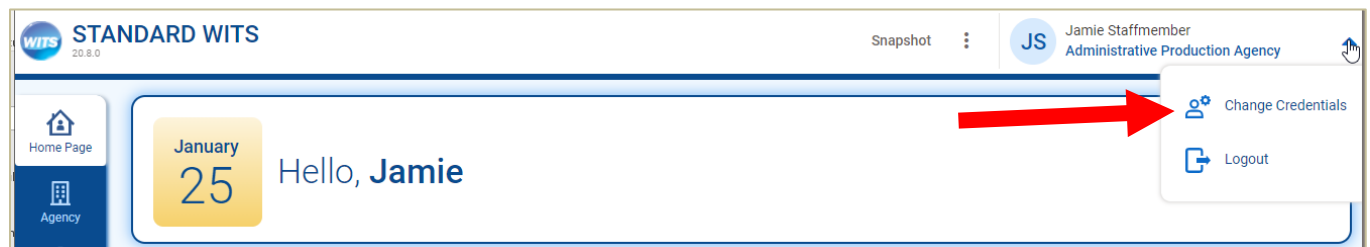


Figure 2-1: Top Navigation Bar, User Display Name

- This will open the **Change Password** screen.

STANDARD WITS
Web Infrastructure for Treatment Services

Change Credentials

User ID: **jamie.staffmember**

Security Question
Who is your favorite musician? ▼

Answer
[Input Field]

Show Password/PIN

Old Password
[Input Field]

New Password
[Input Field]

Confirm Password
[Input Field]

Old PIN
[Input Field]

New PIN
[Input Field]

Confirm PIN
[Input Field]

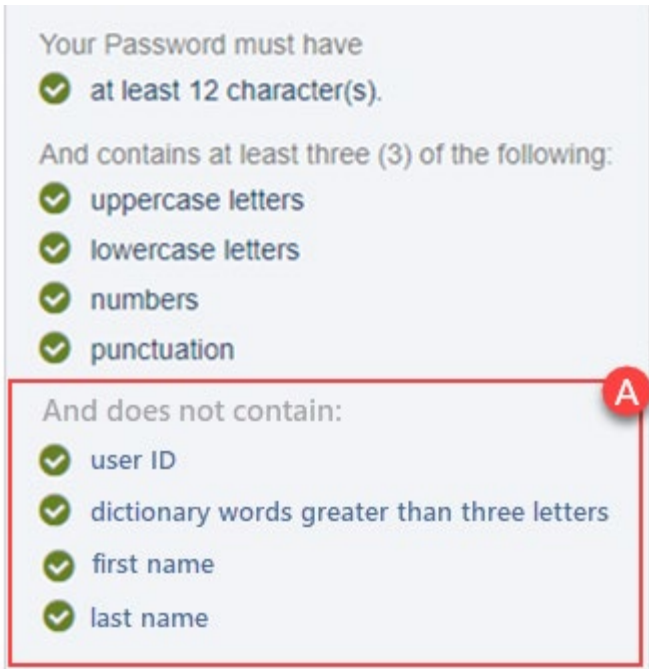
Change × Cancel

Figure 2-2: Change Password screen

- On the **Change Password** screen, complete the fields as listed in the table below.

Table 2-1: Update Password fields

Field	Description
User Name	Read-only field displaying your User ID.
Security Question	Current Security Question is displayed. To update this question, select another option from the drop-down list. Note: Your Security Question will be used to help reset your credentials if you've forgotten your Password or PIN.

Field	Description
Answer	The currently stored answer to your security question is displayed. If you selected a new Security Question, type the answer to that question in this field. Note: Your answer is case sensitive.
Old Password	Type your current Password.
New Password	<p>Your Password must abide by the following parameters:</p>  <p>Note: These Password and PIN requirements may differ based on the settings established for your Training and/or Production site(s).</p>
Confirm Password	Retype your new Password.
Old PIN	Type your current PIN.
New PIN	<p>Your PIN must have at least six (6) characters and contain at least three (3) of the following:</p> <ul style="list-style-type: none"> • Uppercase letters • Lowercase letters • Numbers • Punctuation <p>Note: Your Password and PIN must be different.</p> <p>Note: These Password and PIN requirements may differ based on the settings established for your Training and/or Production site(s).</p>
Confirm PIN	Retype your new PIN.

6. Click **Change**.

Part 2: User Interface

Navigation

WITS is a sophisticated system designed to accommodate many different types of users and staff. In fact, WITS can be customized by any system administrator to create staff accounts with user-specific access and permissions. This translates into a personalized WITS interface whereby the end user will only have access to the modules, screens, and functions that have been assigned to them.

Because WITS uses a personalized user interface, end users will not be distracted by additional screens, modules, or functionality, which can reduce productivity and make an interface less user friendly. To obtain the maximum use out of the WITS system, the user should be aware of the following interface features and navigation, including the following:

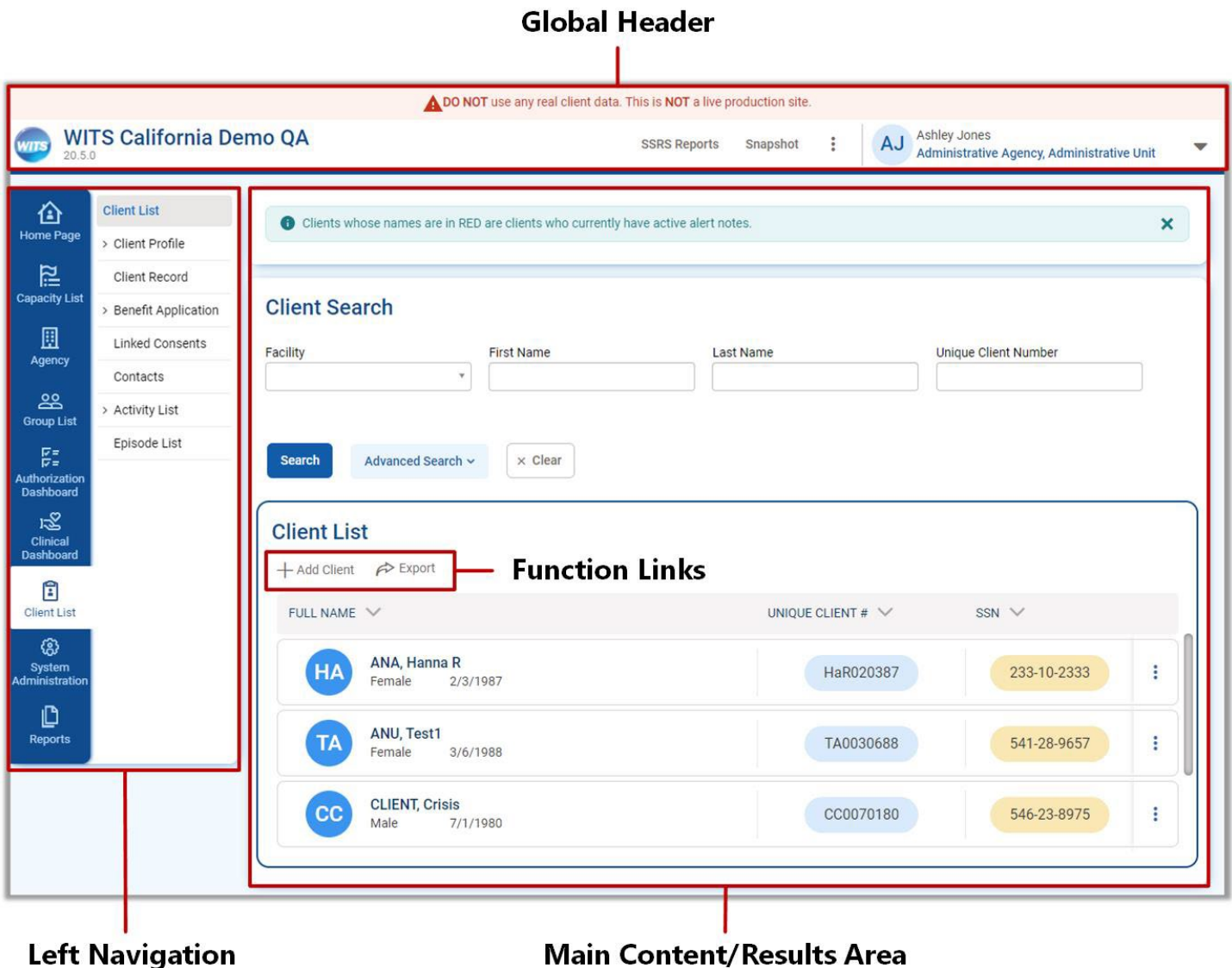


Figure 2-1: WITS User Interface Diagram

1. **Top Navigation Bar:** This area contains information that helps the user know his or her current context in the system, which includes:
 - **User:** The Staff Member currently logged in to the system.
 - **Location:** The Agency and Facility currently selected.




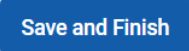
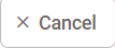


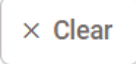


Figure 2-2: Top Navigation and Main Header Features



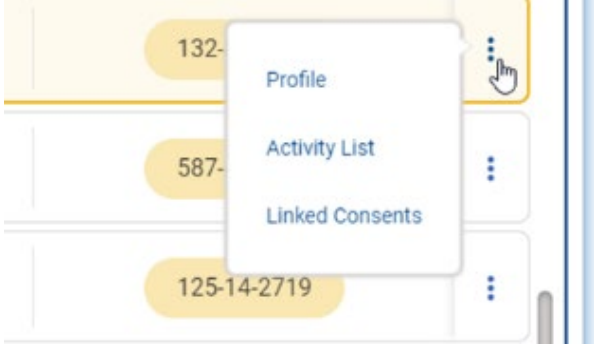
2. **Left Navigation:** PA-WITS has been designed to follow common behavioral health service workflows. As a result, when using the left navigation (menu), you will immediately note that most of the modules and screens have been logically organized in a manner that makes sense to many Clinical Staff, Case Managers, and Administrators.
3. **Main Content/Results Area:** The main area of the screen will constantly change as you progress through your workflow. Typically, you will first see either of these sections:
 - Search:** To find information already entered, or
 - Profile:** To enter new data
4. **Section Headers:** PA-WITS often contains screens that are comprised of several sections. Typical headers indicate Search, List, and Profile (or entry) sections of screens. These section headers are always dark blue and may contain actions such as “**Add**” or “**Export**.” If you are in the context of a client, a section header will also display the **Client Name**, WITS unique client number (**UCN**), and **Case** if you are within the activity list.













5. **Function Links:** If the screen allows you to perform certain functions, such as Add or Export, the functions appear as underlined links. A hand icon will also appear when your cursor floats over the action item, reminding you that you can click.

System Icons

Button	Functionality
	Saves data entered and remains on the current screen.
	Saves data entered and returns to the section start page.
	Cancels the current action and returns to the previous screen.
	Left and Right Arrow Buttons navigate through the various screens in each section
	Moves data from one mover box to another (mover buttons).
	Clears all criteria from search fields.
	Run the search screen using the criteria entered in the search fields.
	Expand search options

Action Links	
	Clicking on a column heading will reorganize the table alphanumerically from 1-Z and then Z-1
	Administrative Actions
	On list screens, hover over the Ellipsis icon to quickly select from associated screens

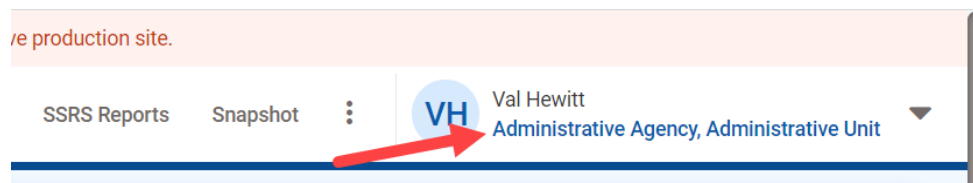
System Alert/Notification	Description
 Success 	Success: This notification informs the user that their action was completed.
 Information 	Informational: This notification message informs users that something has occurred.
 Warning 	Warning: This notification message warns the user that entered data falls outside of a certain parameter. The record can still be updated.
 Warning Elevated 	Warning Elevated: This type of notification is a higher warning message that needs to stand out more.
 Error 	Error: This notification message indicates an error on the screen. WITS will not allow the user to leave or save the page until the stated error is addressed.

NOTE: Error messages will display at the top of the page, unless the screen requires scrolling, in which case, the error message will display where the user is on the page.

How to Change Facilities

Staff members with permission to access other agencies and/or facilities can navigate to those locations by using the **Change Facility** screen.

- On the top navigation bar, point to your current location, and then click the name.



- On the **Change Facility** screen, click the drop-down menus to select a new Agency and/or Facility.
- Click **Go**.

Change Facility

Current Agency
Administrative Agency

Current Facility
Administrative Unit

New Agency
Administrative Agency

New Facility
Administrative Unit

Go

Types of Screens - Home Page

The **Home Page** displays general information including **Announcements**, **Alerts**, the **Scheduler**, and **Informational Messages**. This is the first screen you will see after logging in.

You can also access this screen from the left menu by clicking the **Home Page** button, which is located at the top left of the navigation menu.

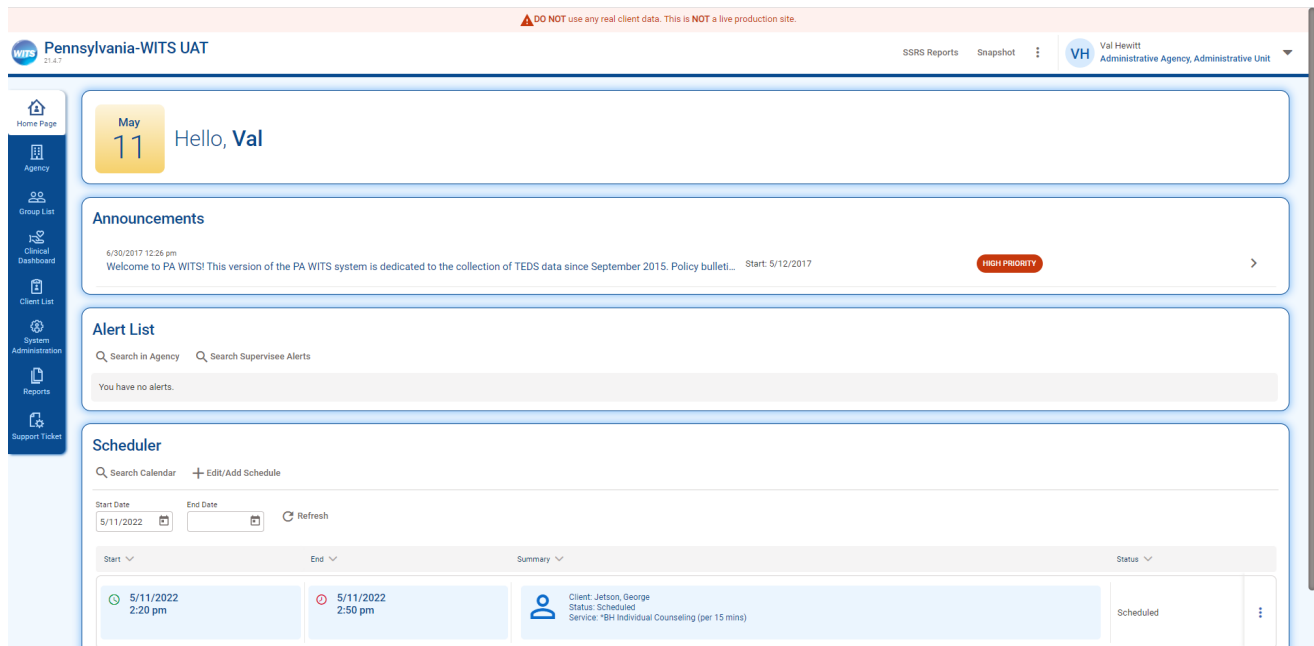


Figure 2-3: Home Page

Search Screen

Search screens allow you to search for items that have already been entered into the system. Search results are then displayed in the List screen. The more information entered in the search fields, the more restrictive the search. Search screens are identified with the Go and Clear buttons.

- **Search** initiates the search.
- **Clear** will remove all search criteria in the search fields.
- An “Advanced Search” button is available, which displays all available search fields on the client list

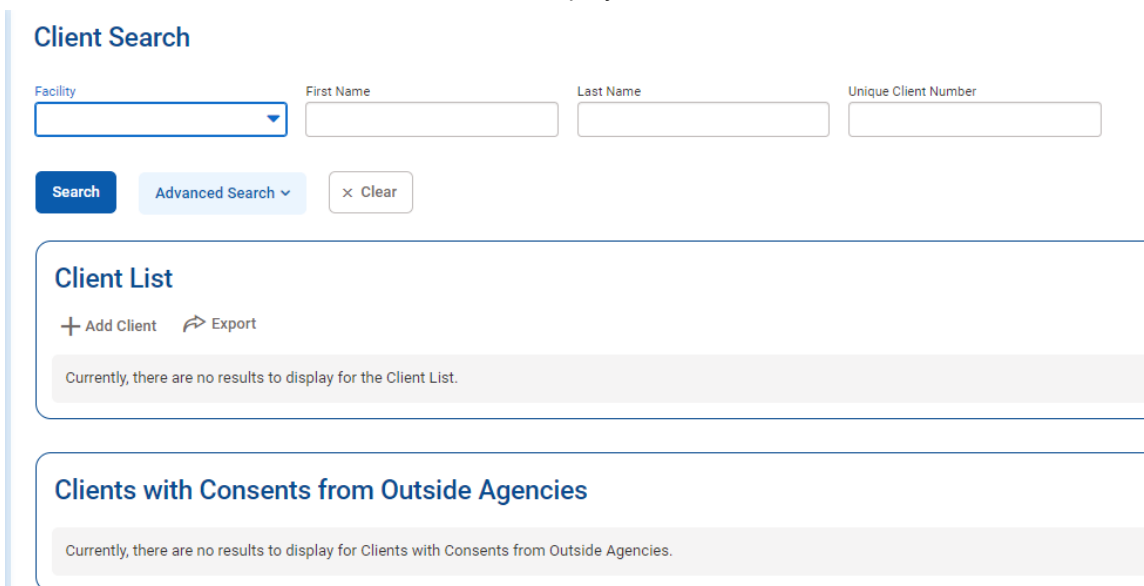
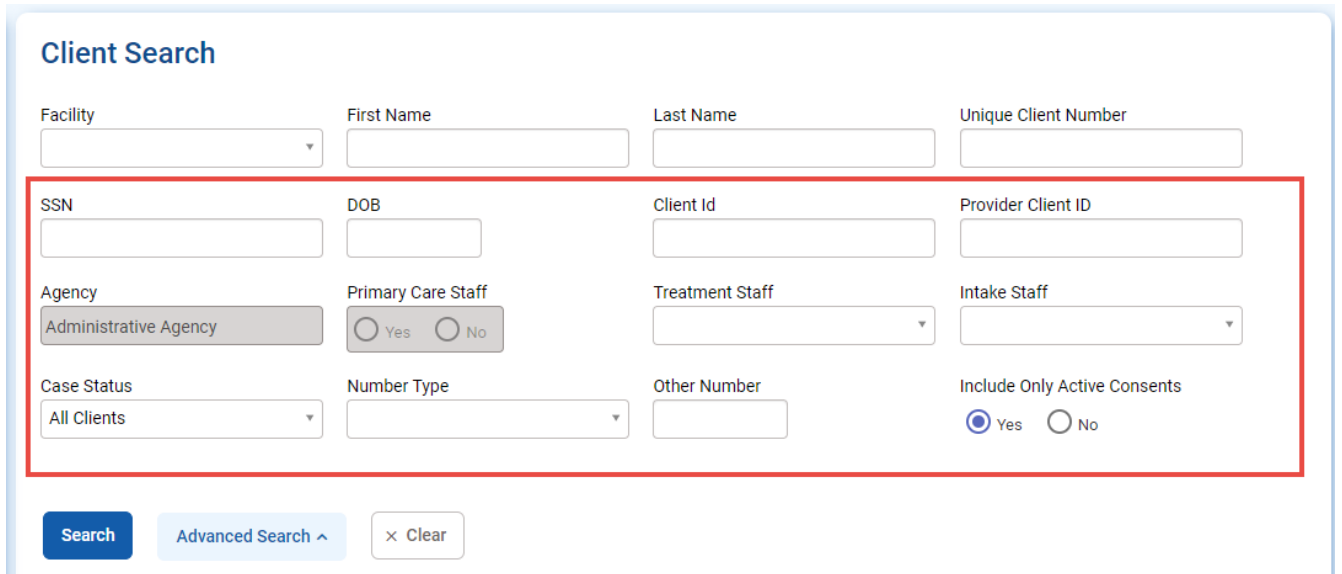


Figure 2-4: General Client Search Screen

Advanced Search:



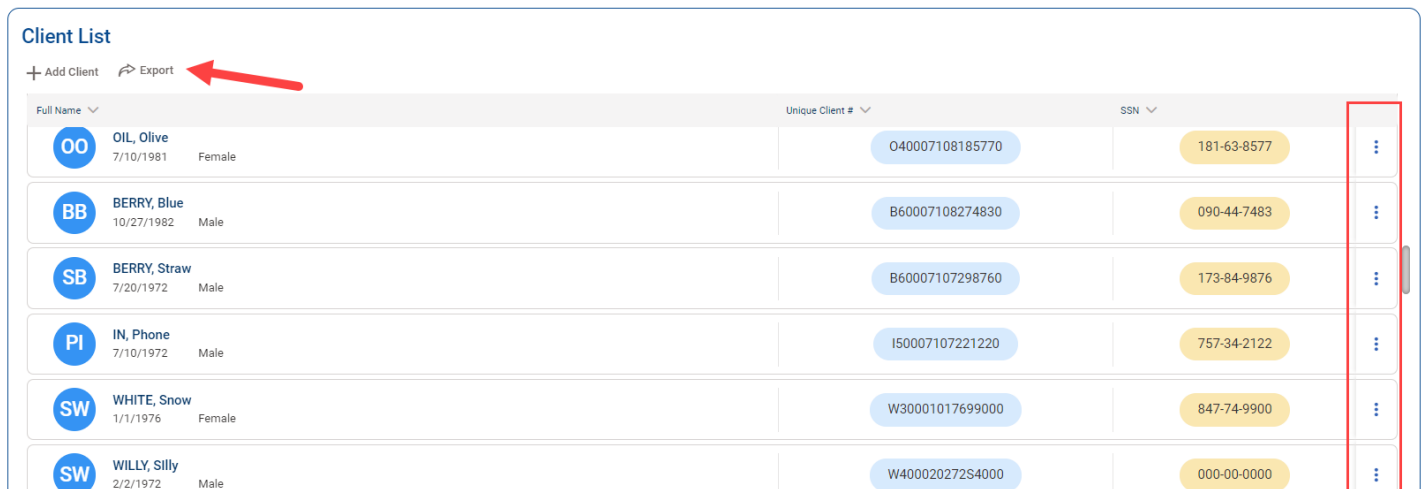
The image shows a 'Client Search' form with various input fields. A red box highlights the following fields: SSN, DOB, Client Id, Provider Client ID, Agency (set to 'Administrative Agency'), Primary Care Staff (radio buttons for 'Yes' and 'No'), Treatment Staff, Intake Staff, Case Status (set to 'All Clients'), Number Type, Other Number, and 'Include Only Active Consents' (radio buttons for 'Yes' and 'No'). Below the form are buttons for 'Search', 'Advanced Search ^', and 'x Clear'.

Figure 2-5: Advanced Client Search Screen

List Screen

A search will result in a populated list, with columns showing various data elements. All lists are sortable by clicking on the column header.

- Many lists have an **Actions** column (ellipsis) offering functions that can be applied to a selection from the list.
- Many lists have an **Export** feature, allowing you to export data on the list into an Excel spreadsheet. Exports are great alternatives to reports.



The image shows a 'Client List' table with columns for Full Name, Unique Client #, and SSN. A red arrow points to the 'Export' button. A red box highlights the ellipsis menu in the Actions column for each row.

Full Name	Unique Client #	SSN	Actions
OO OIL, Olive 7/10/1981 Female	040007108185770	181-63-8577	⋮
BB BERRY, Blue 10/27/1982 Male	B60007108274830	090-44-7483	⋮
SB BERRY, Straw 7/20/1972 Male	B60007107298760	173-84-9876	⋮
PI IN, Phone 7/10/1972 Male	I50007107221220	757-34-2122	⋮
SW WHITE, Snow 1/1/1976 Female	W30001017699000	847-74-9900	⋮
SW WILLY, Silly 2/2/1972 Male	W400020272S4000	000-00-0000	⋮

Figure 2-6: List Screen

Profile Screen

The **Profile Screen** displays the main content area for data entry. Profile Screens include Save, Cancel, and Save and Finish buttons.

- **Cancel:** returns to the prior screen or list without saving.
- **Save:** reviews any business rules associated with the screen before saving the data and will keep the user on the current screen.
- **Save and Finish:** saves the data and returns to the previous list screen.

The screenshot shows a 'Client Profile' form with a header 'Client Profile' and a toggle 'Hide Context Information'. Below the header is a table with the following fields:

Unique Client Number	State Client ID		
Created By	Created Date	Updated By	Updated Date

The main form contains the following fields:

- Current First Name (text input)
- Middle Name (text input)
- Current Last Name (text input)
- Mother's Maiden Name (text input)
- Suffix (text input)
- Birth First Name (text input)
- Birth Last Name (text input)
- Gender (dropdown menu)
- DOB (text input with calendar icon)
- SSN (text input)
- Provider Client ID (text input)
- Driver's License (text input with dropdown arrow)
- County (dropdown menu)
- Has paper file (radio buttons for Yes and No, with 'Yes' selected)

At the bottom of the form are five buttons: '< Back', 'Next >', 'Save', 'Save and Finish', and '× Cancel'.

Figure 2-7: Profile Screen


Part 3: Data Entry Tips

Field Types

- Label placement for each field is now located above the field.
- Required for Completion and Required for Save indicators have changed to the left side.
- Yes/No fields now represented as Radio Buttons

Required Fields

- Easier to distinguish between fields required to save versus required for completion.

Required to Save:  Solid gold bar on left side of field.

- Indicates items required to save the screen.








Required for Completion (Reporting required):  Striped gold bar on left side of field.

- Indicates items required to be in a completed status (i.e., State required fields), but are not required to save the screen.
- When a field is focused, it becomes a bold outlined in blue; it is more prominent than before.

Textbox

Functionality: Enter text into the field.

The table below outlines the changes to text box fields; this pattern is the same for all field types.

Description	Required to Save	Required for Completion
Base		
Focus (when the field is clicked)		
Filled In		
Validation Error (empty)	 <p>*Required to Save</p>	

Drop-down Menu

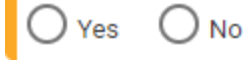
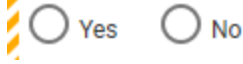
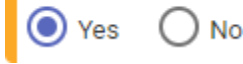
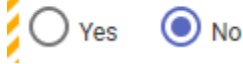
A Drop-down Menu (also called a drop-down list) is used when only one entry may be selected from a list of values. Typically, these values are controlled by your administrator.

Description	Required to Save	Required for Completion
Drop down	Gender 	Preferred Language 

Radio Buttons

Function: Select one option.

- To clear the field, select the option again.

Description	Required to Save	Required for Completion
Base Radio Buttons	Billable 	Consent on File for Future Contact 
Radio Buttons Selected	Billable 	Consent on File for Future Contact 

Multi-Select List Box/Transfer Box

Functionality: Select multiple options from one mover box to another.

- Updated look of mover buttons
- Depending on what browser you are using, the scroll bar appearance differs.

Risk Categories

- Abuse victims
- Already using substances
- Children of substance abusers
- Drop-outs
- Homeless and/or runaway youth
- Mental health problems**
- Physically disabled
- Pregnant women/teens
- Violent and delinquent behavior

Selected Risk Categories

- Economically disadvantaged



Add Selected Risk Categories

Figure 4-1: Multi Select Box Required to Save Question

Races

- Refused
- Alaska Native
- American Indian
- Asian
- Black or African American
- Multi-racial
- Native Hawaiian or Other Pacific Islander
- Other Race**
- Other Single Race
- Tongan
- Unknown
- White

Selected Races

-



Add Selected Races

Figure 4-2: Multi Select Box Required for Completion

Time Input

Functionality: Enter the time.

- Requirements are on the left side of the field

Start Time

End Time

Session Duration

 Min

Documentation Duration

 Min

Travel Duration

 Min

Total Duration

 Min

of Service Units / Sessions

Figure 4-3: Time Input Fields

Mover Box (Dual List Box)

A mover box is used when more than one entry may be selected from a list of values. To choose multiple values from the list, hold down the control key, click the values from the left side, and then click the > button to move the values to the right. To remove values from the selected list, click the value(s) on the right that you want to remove and then click the < button to move them to the left.



Keyboard Shortcut: Hold **Ctrl+A** to select all options.

Races	Selected Races
Alaska Native	
American Indian	
Asian	
Black or African American	
Native Hawaiian or Other Pacific Islander	

Mover Box (Dual List Box) with a Condition

In some cases, you may be asked to provide a condition (such as a date) to go along with the value you choose. Make sure to enter the appropriate date for each selected value.

Client Information To Be Consented

Expiration Type: + Days

*Expiration type is required for disclosure activities.

Client Information Options	Disclosure Selection
ASAM	Admission (DS, +30)
ATR Eligibility Screen	Client Information (Profile) (DS, +30)
Behavioral Health Assessment	
Client Screening	
Consent	
CONTINUUM Triage™ Assessment	
CONTINUUM™	
DENS ASI Assessment	
DENS ASI Lite	
Diagnosis List	

Part 4: Other Features

Snapshot

The Snapshot feature opens a separate window containing a read-only copy of your current screen. This useful tool allows you to access other screens in WITS while still viewing the information within the Snapshot. You can open multiple Snapshots windows simultaneously. Please remember to turn off the pop-up blocker or you will be unable to view the additional windows.

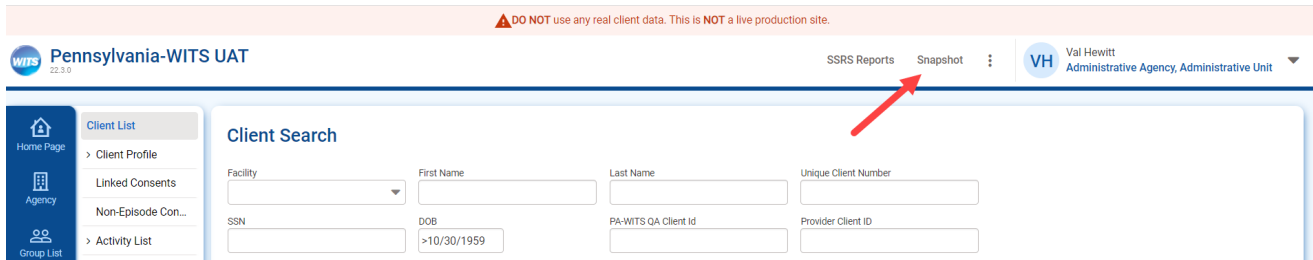


Figure 4-1: Snapshot button

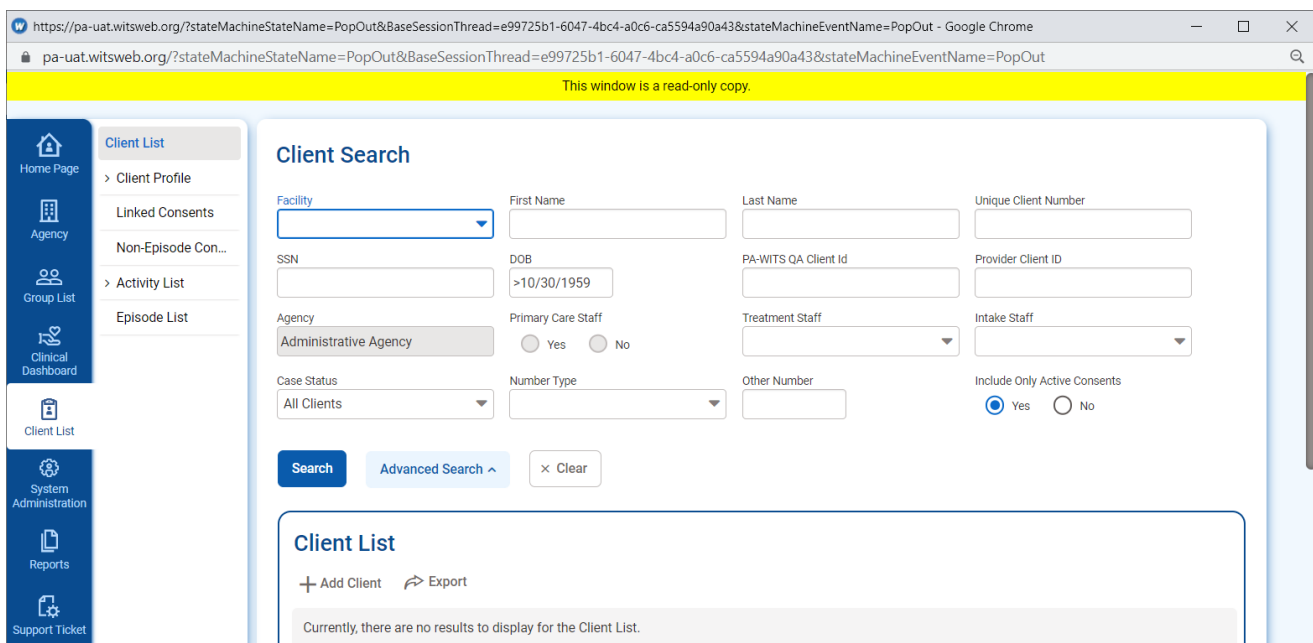


Figure 4-2: Snapshot, read-only window

Print Function

Use your browser's print function to print your screen. Using your mouse, **right-click** on your screen to open a list of options, and then click **Print**.

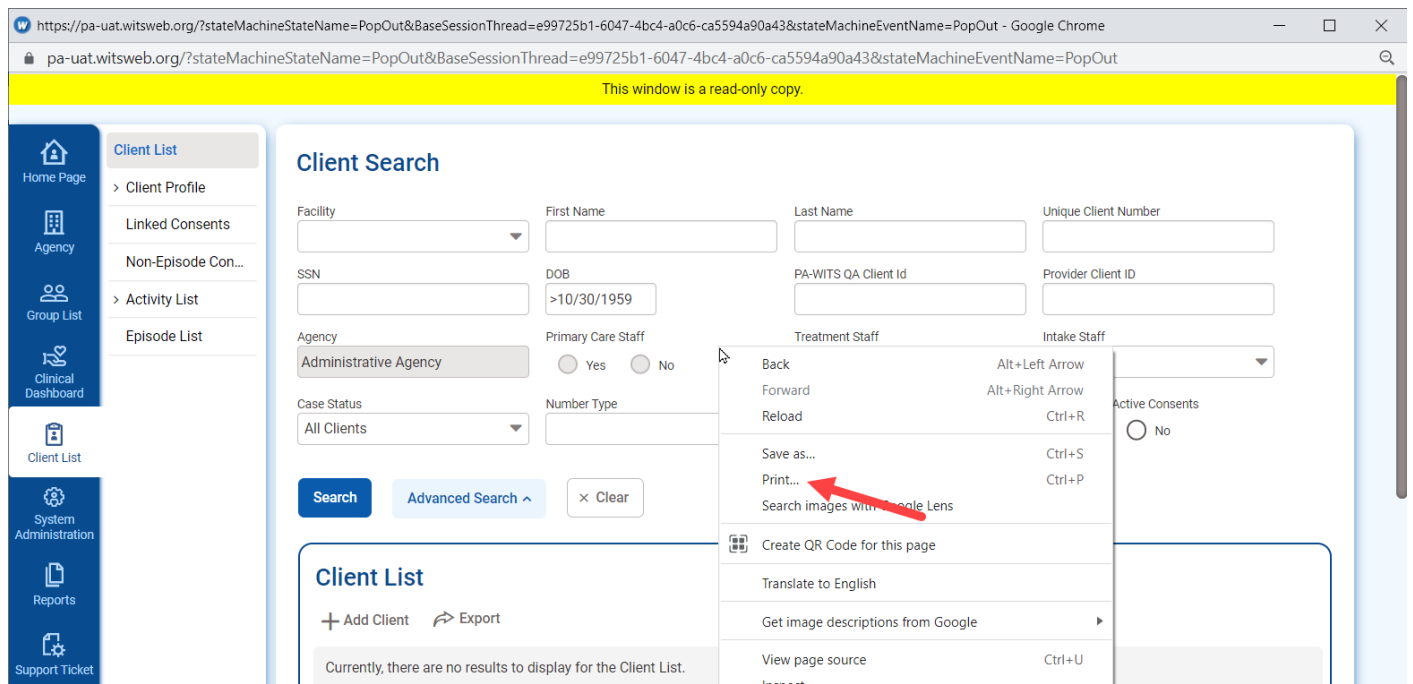


Figure 4-3: Right-click to open Internet browsers Print function.

In the print preview, notice that the system saves ink by only printing the main section of the screen.

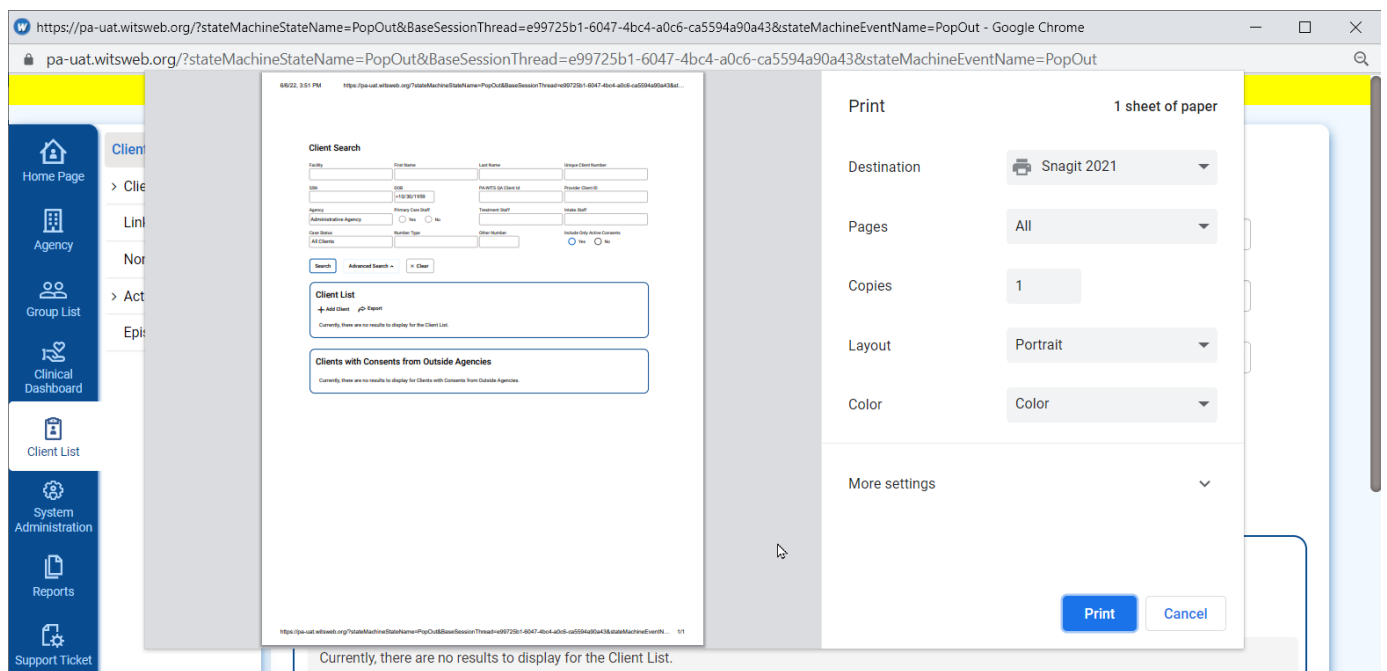


Figure 4-4: Print Preview