ADAMS PUBLIC SEARCH (APS)

User Manual

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Introduction

The Agencywide Documents Access and Management System (ADAMS) Public Search (APS) is a modern, cloud based, full text search application. This is an update to the previous webbased ADAMS search application.

Returning to the Home Page

At any point in the application, clicking on the Home button will return you to the system's Home page. This will clear out any previous search criteria you have provided.

Note: Clicking on the U.S. Nuclear Regulatory Commission (NRC) logo will take you to the ADAMS Public Documents page.

Home Page

When accessing APS, you will be presented with the Home page.



Along the top is the header with the NRC logo and the title of the application, Public Search, being used.

Just beneath that is a row with button options:

- Home—brings you back to the Home page as pictured above (you will lose any previously entered search information when this is selected).
- Advanced Search—takes you to the Advanced Search page with the options to provide criteria for an advanced search. Click <u>Advanced Search</u> to be taken to the Advanced Search pages within this manual and the different options available.

- Load Saved Search—allows you to load a previously saved search. Click <u>Load Saved</u>
 <u>Search</u> for the steps to load a search.
- Quick Searches—clicking the drop-down arrow will display a list of predefined searches that you can use. Selecting one will return the documents fitting the description provided (documents released today, yesterday, or during the last 7 or 30 days).

Note: You will have to click the drop-down arrow next to the words Quick Search to see the options.

 Help & Info—selecting this drop-down menu will display links to other helpful sites and information including the user manual for this system and a link where you can look up Docket Numbers.



<u>Simple Search</u> (the text box in the center of the page) can be used to start your search based on the criteria provided. Details on the Simple Search function are provided below.

Simple Search

In the center of the page is a text box where you can provide words or phrases you are looking for within a document or the properties of a document. Once these details are provided, click the Search button to be taken to the Results page.

The **Search Results** section shows different options once the query results are populated.

Search Terms

A search of the Search Terms returns only documents that contain <u>all</u> term(s) or phrases entered. To perform a Search Term search—

(1) Enter a term, such as "valve" (without quotation marks), or a phrase, such as "fire protection" (including quotation marks).

(2) Click the Search button.

Note: By default, the search is "additive," meaning that it will return only documents that contain <u>all</u> the terms or phrases that you enter. You can use Boolean operators to change your search results. The table below provides some examples.

Terms	Description of Search Results
fire protection valve	Will include documents that contain <u>all</u> of the terms (i.e., "fire," "protection," and "valve")
fire AND protection AND valve	Will include documents that contain <u>all</u> of the terms (i.e., "fire," "protection," and "valve"
II TIPE DIOTECTION VAIVE	Will include documents that contain the exact phrase "fire protection valve"
fire OR valve	Will include documents that contain the words "fire" <u>or</u> the word "valve"

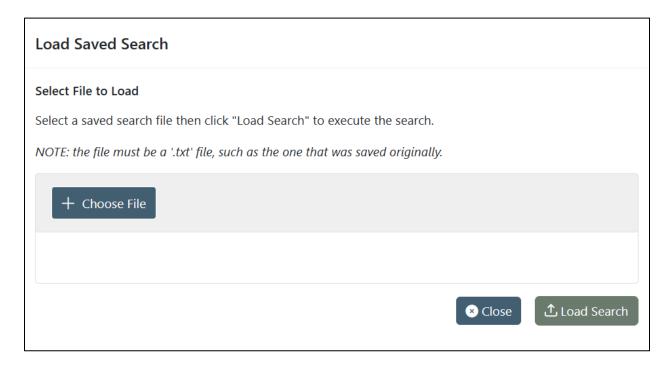
Load Saved Search

To the right of the Advanced Search button is an option to Load a Search. This is used to load a previously saved search within the system.

Note: Steps to save a search can be found by clicking **Save Search**.

Once the Load Saved Search button is selected, you will be prompted to do the following:

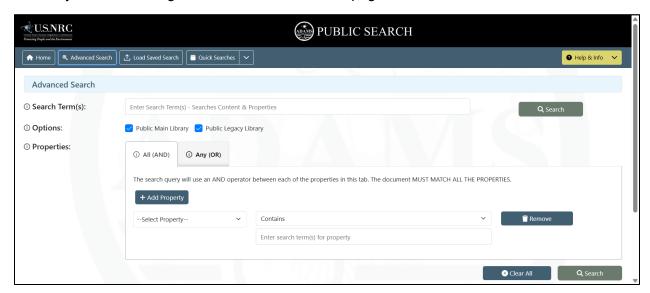
- (1) Select the text file that contains the saved search by clicking the Choose File button.
- (2) In the window that opens, locate and select the Saved Search file.
- (3) Once selected, click the Open button at the bottom right of the window.



The title of the file will be displayed below the Choose File button. You can then click the Load Search button, and the window will close. The system will run the search, and the results will be displayed.

Advanced Search

Advanced Search allows for more granular search criteria to be applied. The sections below review the different options within the Advanced Search. Any time you choose to edit an existing search, you will be brought to the Advanced Search page.



Search Terms (Advanced Search)

In Advanced Search, you have the same search capabilities as presented on the Home page (referred to as Simple Search). You can refer to the <u>Search Terms</u> section for more guidance.

Library Selection (Options)

Beneath the Search Term box are checkboxes for Public Main Library and Public Legacy Library. By default, both are selected, indicating both libraries will be searched based on the criteria provided. You can click on the checkbox to remove the check so that library will not be searched.

Note: At least one library must be selected to run a search.

Properties

The Properties section is broken into two tabs, "All (AND)" and "Any (OR)." This explains how the properties will be put together when filtering the data that will be returned for your search. When AND is used, the document(s) <u>must match all the properties</u> selected within the tab. When OR is used, if ANY of these properties match the document(s) within the tab, they will be returned. You can use a combination of properties in both tabs at the same time to filter your search results. The AND tab is the default tab selected, so you will need to click on the OR tab to add more criteria.

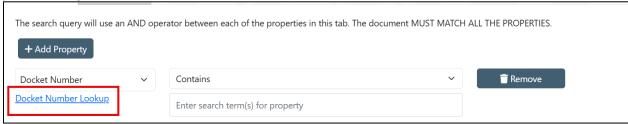
Once you have the correct tab, you can click on the Select Property field and a list of available properties will be displayed. Select the property that you want to use. Next to that field, the Operator field will update based on the property you selected. Once you select the operator, you can then provide your criteria.

If additional properties are needed, click the Add Property button and repeat the steps above. You can use the Remove button next to the property information to have that property removed from the criteria. The Clear All button will remove all the information that has been provided. The steps for providing properties are the same whether you are in the All(AND) or Any(OR) tab.

Note: It is recommended that you do not use more than 10 properties in a single search. Any more than 10 properties can cause the search to run slowly.

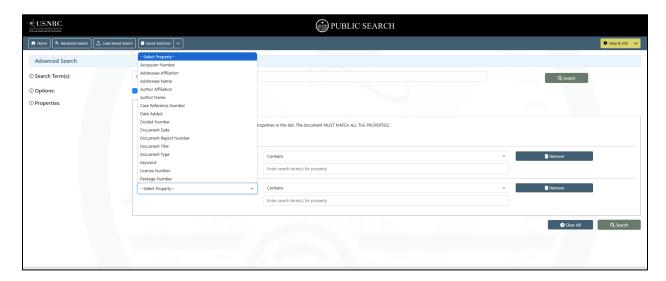
Note: It is recommended that you do not use the contains operator when doing an Author Name or Author Affiliation search due to their having single characters as it can cause unintended search results.

Note: When Docket Number is selected, a link will be available under the property that will take you to a page where Docket Numbers can be looked up.



You can delete criteria for each property by selecting the Remove button. The property as well as the operator and criteria will be removed.

Once all criteria have been provided, click the Search button.



Search Results

Search Filters

Once you have received your search results, you can use filters to further filter or refine them. Search Filters are available in both the Summary and Table views. Be aware that filters will not be retained in searches that are saved or copied. If you want to keep those filters, it is best to add them as properties within the Advanced Search.

Filtering Your Search Results with Search Filters:

- (1) Click the drop-down arrow on the desired facet to display the options available for that facet.
- (2) Select one or more values from the list of options to apply them as filters.

Note: Clicking the Clear Filters button will remove all the filters.

Note: For any filter other than a date-related (i.e. DateAdded, DocumentDate) one, a maximum of 50 values will be displayed. Date related Searches can have up to 1000 values (days) available for display.

Note: The primary search will override any filters applied from the search results view. (i.e. Searching on a date range and then trying to filter on the same date will not work as expected.)

Note: If a date is initially missing from the filter, select the year you are interested in. As you gradually narrow the search, more dates will appear in the filters. You can also use the Advanced Search to filter down to a specific time frame.

Hiding the Filter Menu

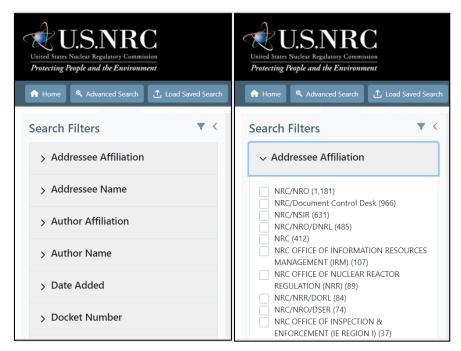
You can control the amount of space available to view the search results by toggling the display of the Search Filters menu

(1) Click the left-facing arrow to the right of the Clear Filters button to hide the Search Filters menu.



(2) Click the right-facing arrow just under the Home button to display the Search Filters menu.





New Search

Once New Search is selected, you will be taken back to the Home screen and the search criteria will be removed.



Edit Search

Once you get the Search Results page, you will have an option to edit the search, regardless of which view you are using. When you click Edit Search, you will be taken to the Advanced Search page with the search parameters previously used already in the fields. You can update the parameters of the search and then click the Search button. Click <u>Advanced Search</u> to go to the section reviewing the different options in Advanced Search.

Note: Facet filters do not carry over when Edit Search is selected.



Save Search

Saving a search will allow you to save the search criteria currently on the screen. You can then use the Load Saved Search function to get the search results at a different time.

Note: The facet filters are <u>not</u> saved in the Save Search function. If you wish to save a narrower search, the faceted information should be entered through the Properties function in Advanced Search.

To save a search, click Save Search. In the new window, provide a name for the file that will be saved and click Save Search within the window. The file will be saved to your Downloads folder on your computer.



For the section on loading a search, click **Load Saved Search**.

Copy Search

The Copy Search button will copy the URL for your search to the clipboard. You can then paste that URL in another browser window, email, or document that can be shared.

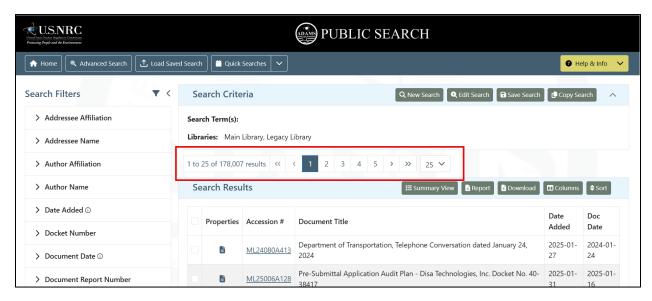
Note: The facet filters are <u>not</u> retained in the Copy Search function.



Paging

In the Table or Summary view, you can determine the number of items you want displayed in the table. Select the number to the far right of the paging bar and the different options will be displayed in the drop-down menu.

If you have multiple pages, you can use the double arrows to jump to the first or last page of the results. The single arrow will move you one page forward or one page back and clicking on a number will take you to that page of results.



Summary View

Summary view allows users to see the first few lines of text available for the results provided. The document title will be listed at the top and clicking on it will download the document.

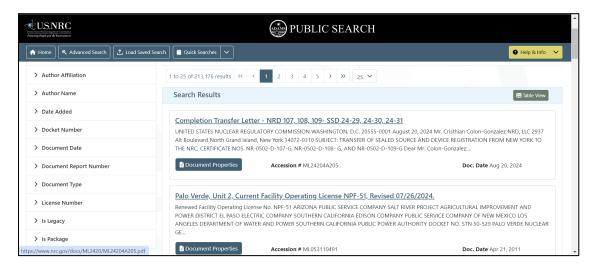
There will also be a short summary of the content of full-text documents available in the Public Main Library. The summary is the first 450 characters of the document.

Packages and legacy documents act differently within this view. When you click on the title of a package, it will open a new browser tab that will display the contents of the package. Also, for packages, a message will appear letting you know that clicking on the title will show the contents of the package.

When you click on the title of a legacy document, a pop-up will appear, informing you that you have selected a legacy document. It will also show the microform address and accession

number for that document. Also, for legacy documents a message will appear letting you know there is no summary for legacy documents.

A Document Properties button, the accession number, and the document date will appear under the summary or note.



Clicking on the Document Properties or Package Properties button will provide you the properties window for that document or package.

Above the search results is the option to convert the results to the Table view. Click <u>Table View</u> for additional information on working in the Table view.

Properties Window

This window is displayed by selecting the Document Properties button within the Summary view. Within the Properties window, users can select and copy any of the displayed property information. There are also two drop-down menus within the window:

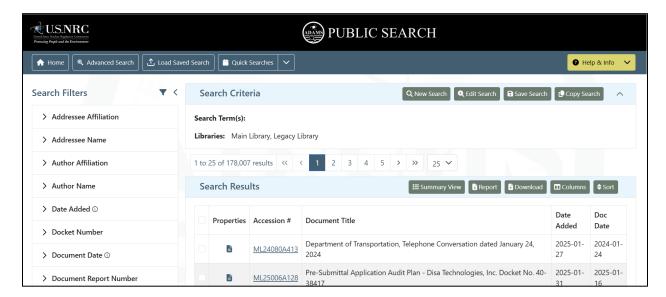
- Document Properties and Package Properties
 - Within these drop-down menus, you will have two additional options:
 - (1) Open Properties—opens the properties in another window
 - (2) Copy Properties—copies the URL to the document or package properties that can be shared with other users
- Document or Package
 - In this drop-down menu, you will have two additional options:
 - (1) Copy Link—copies the URL to a document or package so that the URL can be shared with other users

(2) Download—for documents, indicates that the chosen files will be saved to your Downloads folder; for packages, displays the contents of the chosen folder in another window



Table View

Table view will display your search results in a table format. The sections below review how to edit the table values displayed and the different options present within the view.



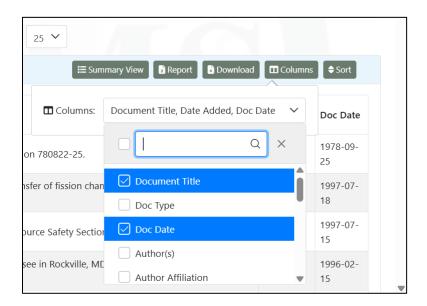
Columns

In Table view, you can edit the columns that are displayed. By default, the following column headers are displayed: Properties, Accession Number, Document Title, Date Added, and Document Date.

To change the displayed columns, click on the Columns button. This will display a small window. Clicking on the drop-down arrow in that window will display all the available properties that can be used as a column header. Selecting the checkbox at the very top will place a check mark in all the boxes so that all columns will display. Next to the checkbox is a search field where you can search the available list to select a particular column header. The list will truncate as you type. There is an X next to the search field that can be used to clear out what you have typed. You can also scroll through the list and select the checkbox next to the property(s) you want to have as a column header.

As you check the boxes, the table will update. Once you have selected all the properties you wanted as a column header, you can just click outside the menu to leave the selection drop-down menu.

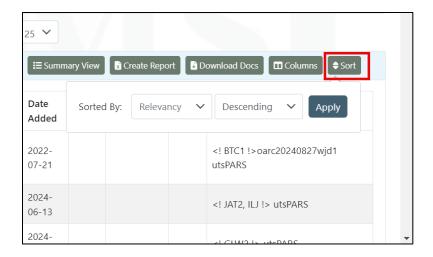
Note: If you do an advanced search, any properties used in the search will automatically be added as column headers.



Sorting

Clicking Sort will open a pop-up window where you can choose the column you want to sort by (e.g., Relevancy), select Descending or Ascending, and then click Apply to implement the selected changes.

Note: As you add more columns, more options will be displayed in the Relevancy field.

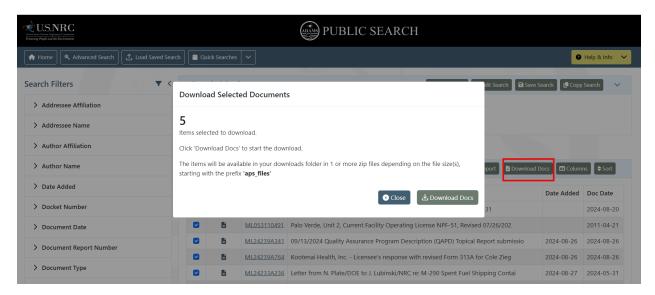


Download

In Table view, you can download multiple documents. You can select a document you want to download by clicking the checkbox next to it. Once you have selected all the documents you want, click the Download button. A window will display showing how many documents you have selected and explaining the format the documents will be downloaded in. You can click the Close button to stop the download and return you to the Results page or click Download to start the download process.

Note: A maximum of 25 documents can be downloaded at one time.

Note: Legacy Documents will not be included in downloaded files since most do not have full documents available.



Icons

The different document types available in the system are represented by different icons. The icons are as follows:

- This icon is used to represent a document.
- h This icon is used to represent a legacy document.
- This icon is used to represent a package.

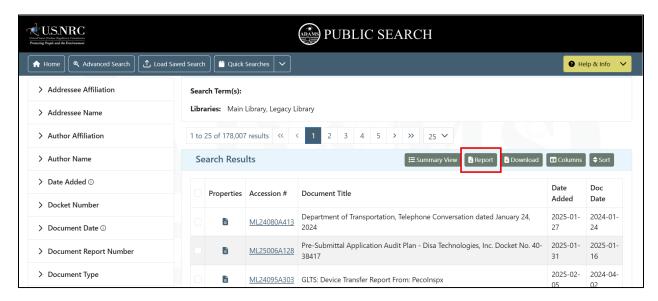
Reporting

To run a report, you must be in the Table view of your search results.

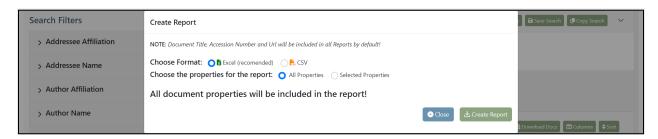
First you will need to select the documents you want to include in the report. Clicking on the first checkbox at the top of the table will cause all boxes to be checked and include all items returned by your search. If you only want a portion of the documents returned, click on the checkbox on the row of the item you want to include so that a check mark is present.

Note: Documents must be selected in order to run a report.

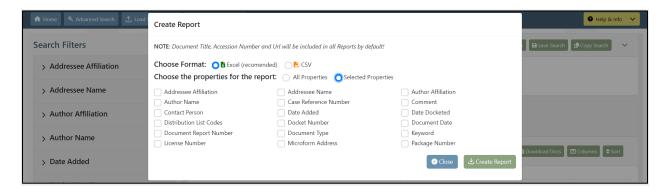
Once you have selected the documents you want in a report, select the Create Report button.



A window will display with selections for different report formats and properties to be included. The format options are Excel, which is recommended and selected by default, or .csv. Click next to .csv to select that format. For Properties, you can choose between All Properties, which is the default, or Selected Properties.



If you choose Selected Properties, the window will expand and display all of the available properties that can be included in the report. Click the checkbox next to the property(s) you want included in the report so that a check mark is present.



Once you have selected the format and properties you need, click the Create Report button and the report will be generated in the format requested. The report will be available in your Downloads folder on your computer.

Note: All reports include the document title, accession number, and URL. This is also indicated in the Report window.

Properties in Profile

This section describes the fields that make up a document profile in APS.

Property Name	Description	
Accession Number	A system-generated identification number (ID) assigned when a document or package is first added to an ADAMS Library, consisting of the following elements: two-character alphabetic code (e.g., "ML" to indicate the original library) nine-character numeric code, known as the "ADAMS Item ID"	
Addressee Affiliation	The name of the organization receiving the agency document(s)	
Addressee Name	The name of the individual(s) to whom the document is addressed	
Author Affiliation	The name of the organization that originated the document	
Author Name	The name of the individual(s) who approved the document or is listed in the title page of the publication	
Case Reference Number	A unique number or name, or both, that refers to a specific action or identification of a document and is applied to all related documents and associated records (e.g., "FOIA/PA-2001-0012" and "TAC MB8992")	
Comment	Additional textual information deemed important about the document	

Property Name	Description	
Contact Person	Information about the person or organization primarily responsible for the document	
Date Added	The date a document was added to ADAMS	
Date Docketed	The date that a document is officially accepted by the Commission's Office of the Secretary (SECY) as part of an adjudicatory record of an agency hearing; this may or may not be the date the document was received by the NRC	
Distribution List Codes	Code used to provide distribution notification of the document, including external recipients (e.g., "NMSS10," "SECY01," and "AP01")	
Docket Number	An NRC-assigned number that uniquely identifies a facility, licensee, or activity. The first three digits represent the associated part of Title 10 of the <i>Code of Federal Regulations</i> . The abbreviation "(MV)" designates that this is a multivalued property, meaning that more than one docket number may be selected if appropriate (for example, "05000259" and "WM00011")	
Document Date	The date of the document (i.e., the date on a letter or memorandum, or another date assigned to the document following office business rules for date fields)	
Document Report Number	A unique number used to identify or retrieve an actual document or any of its derivatives, such as a new edition, revision, supplement, or errata data (e.g., "NUREG/CR-0927, Rev. 2")	
Document Title	A brief description of the subject or contents of a document	
Document Type	Indicates a specific document type: NRC bulletin contract SECY paper	
Keyword	A description of the document, sensitive unclassified nonsafeguards information (SUNSI) review information and designation code if nonpublic, and ADAMS template number (when submitting NRC-generated documents to the Document Processing Center): • Category A: SUNSI • Category B: Nonpublic/Nonsensitive Records	
License Number	An NRC- or State-assigned number identifying an NRC or State license or permit holder	
Microform Address	Indicates the microfiche location of a Public Legacy Library document in the NRC Public Document Room microfiche collection	
Package Number	Indicates the accession number of the ADAMS package in which a document resides	

Wildcards

APS supports using wildcards and other special characters in your search parameters.

Wildcard Searches

APS supports using special characters universally recognized for use in wildcard searches.

The following table explains the single and multiple wildcard search characters and provides examples of how to use them.

Note: When using these wildcards in the search terms box, it is recommended that you put the term(s) in quotes.

Wildcard Character	Usage
	To match on a character string of unspecified length. For example, 98072* would return values such as 98072-1222 and 98072-5261.
?	To match on a single character. For example, <i>980?2</i> would return the following: 98002, 98012, 98022, 98032, 98042, 98052, 98062, 98072, 98082, and 98092.

Note: You can combine wildcard characters in a single search. For example, *980*?2* would return results such as 98072-1222 and 98052-1234.

Note: You cannot use wildcards at the beginning of a phrase.

Affix Types in Wildcard Searches

Wildcard characters can be used for prefix, infix, or suffix matching. The following table provides explanations and examples of each of those affix types.

Affix Type	Description and Examples
Prefix	The term fragment comes before the * or ? characters. For example, <i>alpha</i> * returns "alphanumeric" or "alphabetical." Prefix matching is supported in both simple and full syntax.
Infix	Term fragments enclose the * or ? characters. For example, <i>non*al</i> returns "nonnumerical" and "nonsensical."
Suffix	The term fragment comes after the * or ? characters, with a forward slash to delimit the construct. For example, /.*numeric/ returns "alphanumeric."

Suffix matching requires the regular expression forward slash / delimiters. Generally, you cannot use a * or ? symbol as the first character of a term without the /. It is also important to note that the * will behave differently when used outside of regular expression (regex) queries. Outside of regex forward slash / delimiters, the * is a wildcard character and will match any series of characters, much like .* in regex. For example, "search=/non.*al/" will produce the same result set as "search=non*al" would.

Special Characters

The following table provides a list of special characters and uses "Yes" and "No" to indicate whether they are enabled in an application. If a special character is <u>not</u> enabled, then it does <u>not</u> perform any special function, and the search treats it as a regular character.

Character	Enabled	Usage
+	Yes	Indicates a <u>required</u> term. Searches for the required term and, optionally, the other term(s).
(Yes	Used in combination with the right parenthesis to group terms into subqueries.
)	Yes	Used in combination with the left parenthesis to group terms into subqueries.
	Yes	Used in pairs to enclose a phrase and search on the complete phrase (e.g., "backflow valve" would find documents referring to backflow valves.
~	Yes	 The tilde symbol (~) can be used in a Fuzzy Search or a Proximity Search: Fuzzy Search: Use "~" after a term to find terms that differ by one character. Example: color~ would find "colour." Cannot be used for search phrases. Proximity Search: Use "~" and a number after a phrase that sets the proximity boundary by defining the maximum number of words that can separate the words in the phrase. For example, "hotel airport"~7 will return items that contain the terms "hotel" and "airport" within five words of each other, so it would not return an item with the phrase "the hotel must be within 1 mile of the airport" because there are seven words between "hotel" and "airport."
*	Yes	Wildcard—Unspecified length. Example: <i>immerse*</i> returns variations such as "immerse," "immersed," and "immersion."
?	Yes	Wildcard—Single Character. Example: <i>immerse</i> ? returns the variations "immerse" and "immersed."
\	Yes	Escapes any special character that immediately follows it and treats that character as a regular character. For example, 98072* would escape the asterisk (*) and treat it like a regular character instead of a wildcard character, so the search would return items that referenced "98072*."
&	No	Searches for items containing either or both of the terms, same as the OR operator.
٨	No	Boosts the preceding term, which makes documents containing the term more relevant to the search. For example, <i>submersible</i> ^ <i>pump</i> will increase the relevancy score of documents that contain the term "submersible."
!	No	Searches for the items containing the first term, but <u>not</u> the term following the character. <u>Cannot</u> be used with a single term. For example, <i>substrate !concrete</i> would return documents that contain "substrate" but <u>not</u> "concrete."
/	No	This character has no function in searches.
{	No	This character has no function in searches.
}	No	This character has no function in searches.
[No	This character has no function in searches.
]	No	This character has no function in searches.

#	No	This character has no function in searches.
,	No	This character has no function in searches.

Tips and Known Limitations

The section below will provide suggestions for performing searches within APS. It will also cover known limitations with APS.

- ❖ Docket Number type ahead is now available on the last three of more digits of the docket number. If you are trying to do this lookup within Advanced Search, you will need to use the Contains operator.
- ❖ Using the Load Search feature when a search has already been run will cause the columns displayed in the first search to remain. As an example, if you load a search filtering on Docket Number and Author Name but your previous search, which results are still displayed, has columns for Addressee Affiliation and License Number, you will still see the Addressee Affiliation and License Number columns in the new results.
- ❖ When downloading documents, once you reach a zip size of 25MB a new zip file will be created.
- Using the Starts With operator for multivalued fields looks at the first value provided in the property. It is possible what you are looking for is listed further in result set due to lower relevancy score if there are many values provided.
- When selecting from the type-ahead options when doing a title search, you will want to avoid the Contains operator. If you must use the contains operator, do not select from the type ahead options provided.
- Avoid using the Contains operator when your search criteria has single characters, such as when searching Author Name, as it can lead to "noisy results" due to single character matching.
- ❖ When returning to the search results from the Properties page for a document, the screen will no longer return to the top of the search results.