



Version 2.1

"Getting Started"

User's Guide

(Agency Edition)

Developed to help new users get a quick
start on using CASST

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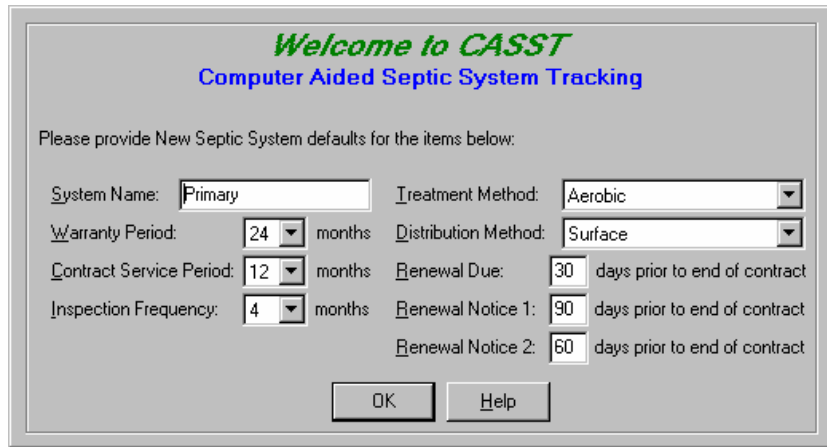
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Using CASST, Version 2.1

(Licensed as an Agency)

Getting Started

After installing CASST, using the installation guide that is provided on the inside cover of the installation CD, the program is started by selecting "CASST" from the "Start" - "Programs" option of Windows®. When CASST is started for the first time, a "Welcome to CASST" screen, as depicted below, will be presented. A list of the "default" values is displayed. CASST uses these defaults when creating a new record for an Onsite Wastewater System.



Although all of these default values can be set later, the opportunity to set the appropriate settings for these defaults is presented as the program starts. The important thing to remember about these settings and/or selections is, that they will only determine the **default** settings for all "new systems" as they are entered into CASST. Any of these settings can be changed for each individual system.

Data Entry Process for Setting up Existing OSSF Systems

When the program opens, a single screen is presented where the information for one system can be displayed. From this screen various options of the program can be utilized for locating and managing the data about individual systems. Many reporting options are also available.

When the program is started for the first time, there will be no records or other data in it. It is the responsibility of the individual user to enter all data needed by the program. Providing the needed data and entering

all appropriate information is intricate and essential to attaining the greatest benefit from using CASST on a daily basis.

Learning the methods for effective data entry and the essential use of CASST will be the focus of the remainder of this document. More assistance in using the features in CASST is available through the Help file in CASST. Users should press F1 at anytime to get context sensitive help.

In the normal day-to-day usage of CASST, the primary need for data entry will be to enter the needed data for issuing new permits, recording start-up inspection data, recording and documenting periodic maintenance inspection reports and the management of Owner Renewal contracts. The most immediate and demanding job, however, is to get the historical and existing data into the program. There are very few short cuts to getting this task accomplished, however, CASST makes the job much less intimidating by providing a one time data entry" methodology. Information should be entered once and then used as many times as necessary, without re-keying it.

Entering System Data

As soon as the program opens, the user is presented with the main program screen of CASST, as shown below.

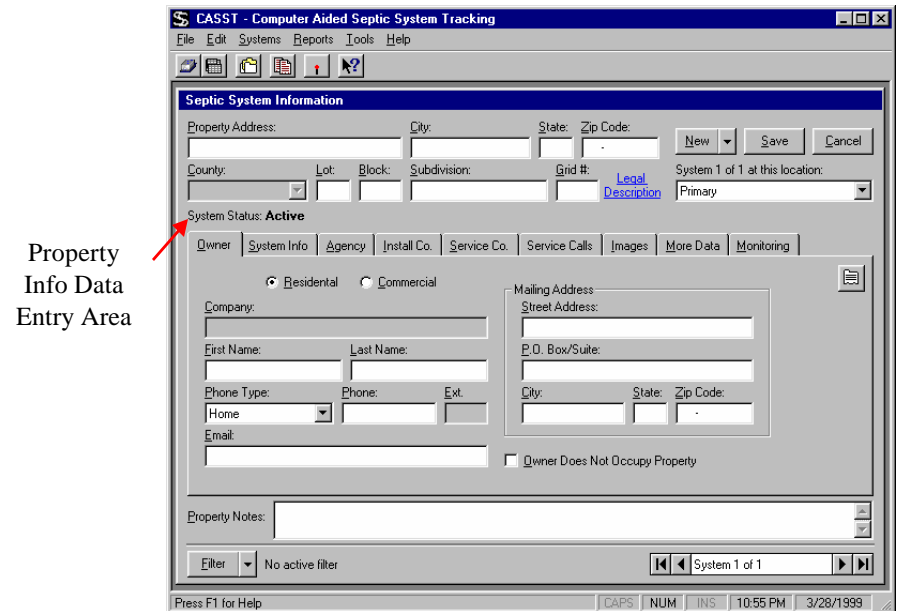



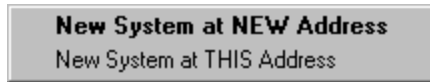


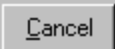

Figure 1

At this screen, if no records have been entered, the user can simply start to enter the information about the property address. If other systems have already been entered, selecting the "New" button, , will create a new blank record for entering the data for a new system at a new address.

Provisions have also been made for creating a new system at the currently selected address. In order to use this option, at least one system record must already exist in the program. By selecting the  button at the right end of the  button, the user can select from the popup menu below:



Selecting the option at the bottom of this menu will cause a "New System at THIS Address" to be created. When creating a "New System at THIS Address", the existing property and owner information is retained. All other data entry areas are cleared in anticipation of the new data for the new system.

Using the "Cancel" button, , will discard all changes since the last action that caused the data to be saved, including the creation of a new system. Using the "Save" button, , will save all changes made up to this time.

Entering Property Information (Agency Version)

CASST is a very friendly and open program. There are very few things that are absolutely required. Among the items that are required are the first five (5) items of the "Property Information." These items are (1) the "Property Address", (2) the "City" where the property is located, (3) the two character abbreviation for the "State" where the property is located, (4) the "Zip Code" for the property and (5) the "County" where the property is located. Without the entry of these items a record for a system cannot be saved.

Note: Although these items do not have to be entered prior to the entry of other information about the new system, only when these five items have been entered can a record for an OSSF system be saved.

The "Property Information" area of CASST is always visible at the very top of the data entry screen, just above all of the "Tabs" that organize other related information about a single system. Please see **Figure 1** on page 2.

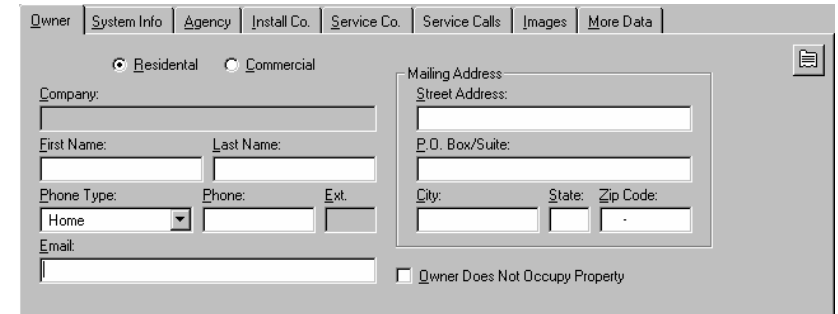
All other items in the "Property Information" area are optional.

Special Note: Although the entire data entry screen of CASST, as seen in **Figure 1** on Page 2, will always be displayed in its entirety, for the purpose of conserving space in this document, only

the specific data entry area of each "Tab" will be shown in the graphics.

The "Owner" Tab

Shown below is the "Owner" Tab.

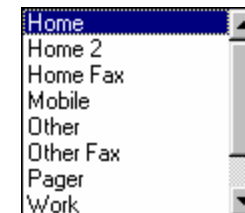


Entering the "Owner" information is actually optional. The owner information is not absolutely required, however, if the full functionality of CASST is to be utilized, every effort should be made to provide as much information as possible.

In addition to the standard personal information requested from this tab, there are a few things that need to be noted.

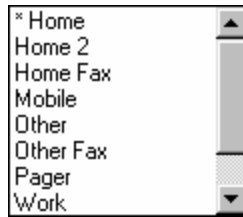
Because the majority of Onsite Wastewater Systems are installed at a residence, the default designation for a system is "residential, however, if the current system is being installed at a commercial site, an option button for designating this is presented at the top of the "Owner" tab. When the "Commercial" option is selected, the "Company" text box will be made available for entry of the name of the commercial operation.

The entry of multiple phone numbers for the Owner is accomplished through the use of the "Phone Type" pull down list box as shown below.



This list provides opportunities for the entry of many types of phone numbers. This method for entering phone numbers is used throughout the program.

After selecting a "Phone Type" from the list and entering the actual phone number for the selected type an asterisk will appear to the left of the "Phone Type." In the graphic below, the asterisk has been placed next to the "Home" and "Work" options, indicating that a phone number has been entered for each option.



It should also be noted that when a "Phone Type" option is selected that could possibly have an "Extension", the text box for entering the phone extension would be made available.

As the "Property Address" and other property information are being entered, these entries are defaulted to be the mailing address for the Owner. If the owner receives mail at an address other than the property address, any of the mailing address information for the owner may be changed at any time.

The other point of interest in this tab is the "Owner Does Not Occupy Property" check box. When this option is selected, an additional "Tab", named "Occupant" is visible on the line of tabs.

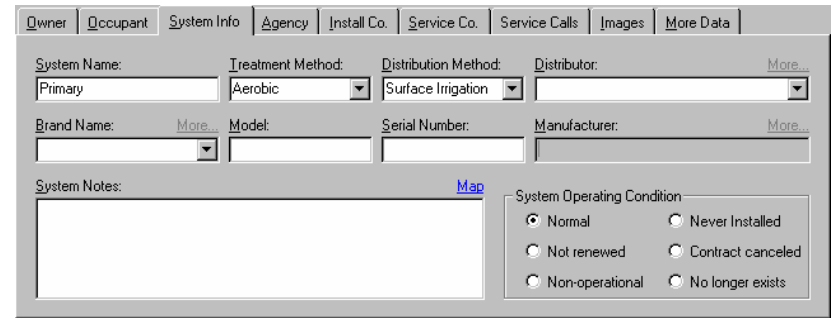
The "Occupant" tab is shown below.



This tab is to be used in those cases where the owner does not reside at the currently property address. By simply clicking the "Owner Does Not Occupy Property" check box on the "Owner" tab all of the same data entry opportunities are for the "Occupant" as are available for the "Owner." If, at any time, this option is no longer needed, clicking the "Owner Does Not Occupy Property" check box on the "Owner" tab again will cause the "Occupant" tab to not be visible.


The "System Info" Tab


The "System Info" tab is shown below.



The essential entries needed on this tab include the "Brand Name", the "Model" and "Serial Number." Other options and data entry areas are quite useful if CASST is to be utilized to its fullest extent. The other options and fields are not absolutely required in order to use CASST for tracking and reporting on Onsite Wastewater Systems.

The first item to be entered is the "Brand Name." This item is requested from the user through the use of a "dropdown list box."

These dropdown list boxes are easily recognized. They have a  at the right end. The use of these dropdown lists saves time while providing consistency and accuracy. There are actually three methods for providing the "Brand Name" using the dropdown list box.

The first option is to simply select the  at the right end of the "Brand Name" drop down list box to display the "Brand Name" list and select the desired "Brand Name" from the list.

If the desired "Brand Name" is not in the list, one of the other two options for providing the "Brand Name" will have to be used.

The second option for providing the "Brand Name" is actually the preferred and recommended method, known as "Dynamic Data Entry." For more information on using this option, see Dynamic Data Entry on page 18.

Another method for providing the "Brand Name" is accomplished by entering data directly into the desired "Support Data" category. (See "Using Direct Support Data Entry" on page 19.

NOTE: Once an entry has been made for one of the "dropdown lists", that selection will then be available each time that "dropdown list box" is used. Typing or entering information for an item in these lists must only be entered once.

The "Agency Info" Tab

The "Agency" tab is displayed below.

Due to the fact that CASST is currently licensed for use as an "Agency," the Name of the Agency to which CASST is licensed will be defaulted and displayed in the "Agency" dropdown list box. In this case, the dropdown list box will not be available for use. As shipped, CASST does not have any information about the "Agency" other than the Name. Additional information is needed and must be supplied by the user. To enter more information related to the "Agency", click on the word [More...](#). The "Agency Data" screen as shown below will be displayed.

Provide any and all additional information about your "Agency" and select the "OK" button to return to the main data entry screen of CASST.

Once back in the "Agency" tab of the main entry screen, an entry should be made for the Permit "Number", the "Issue Date", the "Cost" of the Permit. If the record being entered is for a system that has already been installed and approved for operation, the "Approval Date" (the date that the system was approved for operation) should be entered. When the "Approval Date" is entered CASST will check to

see if the "Install Date" on the "Install Co" tab and the "starting" date on the "Service Co" tab are blank. If either of these dates are blank the "Approval Date" will be entered by CASST as the default value for these fields. See "The "Install Co." Tab" below.

If your Agency uses a dual permitting process, the option button "Separate Permits for Construction/Operation" should be clicked. This will cause additional entry areas to be displayed. A dual permit process screen is displayed below.

Other options should be selected and entries made as required.

One of the data entry features of CASST is that the date provided in the "Approval Date" (single permit process) or the "Issue Date" in the "Operation Permit" section (dual permit process) is defaulted to the "Install Date" on the "Install Co." tab and to the current contract "Starting" date on the "Service Co." tab.

The "Inspections" area is to be used to record any actual visits made to the currently selected system by an Agency Representative. For more information about the use of this feature, please see the documentation that ships with CASST.

The "Install Co." Tab

The "Install Co." tab is displayed below.

No fields in this tab are considered to be absolutely essential and therefore entry is not required before a record can be saved, however,

the entry of information about the Installation Company is very beneficial if the maximum power of CASST is to be utilized.

Please note that, as with all other dropdown list boxes, there are three ways to get the desired information into these boxes.

1. Make a selection from the dropdown list, however, if the desired option is not available, one of the other two options must be used.
2. Use the "Dynamic Data Entry" method. See Dynamic Data Entry **on page 18**.
3. Use the "Direct Support Data Entry" method. See Using Direct Support Data Entry on page 19.

Although not an essential requirement, the name of the "Installation Company" should be provided. Only when the "Installation Company" has been provided will the dropdown list box for the name of the "Installer" will be enabled. The name of the licensed Installer should then be provided using the same options as have been previously described for all dropdown list boxes.

NOTE: A selection for the ""Installation Company" is required before the dropdown list box for the name of the Installer can be used because all licensed installers are associated with a specific installation company during the entry of the installer's name. Therefore, when an "Installation Company" has been selected, the displayed list of installers will only list those installers who are actually associated with the selected "Installation Company."

The "Contract Date", the date that the Installation Company and the buyer made an agreement to install the system, can also be provided.

If a "Approval Date" has been entered in the "Agency Tab", that date will already have been entered in the "Install Date." If this is incorrect, it can be changed.

The "Service Co." Tab

The "Service Co." tab is the only tab that has multiple tabs defined within it. Although only the "Initial Contract" tab is visible during the initial data entry and setup, two more tabs, the "Inspections" and "Contract Renewal" tabs, will eventually be made available. As the setup process is completed, CASST will then present the necessary areas for user input.

During data entry, the first thing that must be done concerning the initial contract, is to set the criteria for the contract.

Establishing and Initiating a Contract

The "Service Co." tab is shown below as it first appears during the data entry and contract setup process.

The screenshot shows the "Service Co." tab in the CASST software. The "Initial Contract" sub-tab is selected. The "Service Company" dropdown menu is set to "Southside Septic Systems, Inc." with a "More..." link. Below this, there are radio buttons for "Warranty" (selected) and "Service Contract". The contract duration is set to 24 months, starting from a blank date field. There are also dropdown menus for "and inspections every 4 months" and a checkbox for "With chlorine". An "Activate System Tracking" button is located below these options. At the bottom of the tab, there are three fields for "Renewal Notice 1: 90", "Renewal Notice 2: 60", and "Renewal Due: 30 days prior to end of contract".

Most of the selections in the "Initial Contract" tab are actually set using predetermined user definable defaults. (These defaults can be redefined at any time from the "Misc/Defaults" tab on the "Support Data" window.) All default settings can be changed on a system-by-system basis.

This tab requests one of the few pieces of data that is **required** by CASST. A *"starting" date for the current contract must be provided before the tracking of the activities required by law can be initiated.*

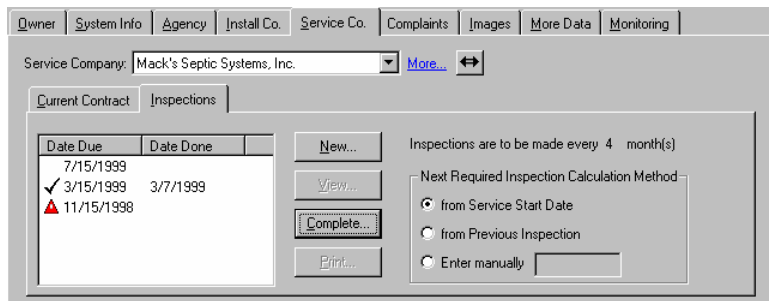
NOTE: If a "Approval Date" was provided on the "Agency" tab or an "Install Date" was provided on the "Install Co." tab while the "Starting" date was blank, whichever of these dates was provided first will have been defaulted to the "starting" date on the "Service Co." tab. If this default is incorrect, it should be changed before initiating the contract.

When all perimeters for the Current Contract have been correctly provided, the "Activate System Tracking" button located on this tab must be used to "start" the tracking process for this system using the perimeters provided. When this button is clicked, a dialog box requiring confirmation of the perimeters for this contract as shown below will be displayed.



NOTE: The purpose for this confirmation of the perimeters of the current contract is that after the "OK" button on this dialog box is selected, these perimeters cannot be changed. This is one of the only things in the entire program that cannot be changed. If this information is entered incorrectly and changes are required, the entire record will have to be deleted and re-entered. It is, therefore, very important that these perimeters be correct.

After the current contract criteria has been established and the contract "Initiated", the appearance of the "Service Co." tab will change. An "Inspections" tab will be visible as shown below.



This will now be the default view for the "Service Co." tab. Completion and management of required, periodic maintenance contract inspections is accomplished from this tab.

Completing and Recording Service Company Inspection Visits

Providing tools for being able to make timely inspection visits and the recording and reporting of the results of these inspection visits is one of the most valuable tools that CASST provides to the user.

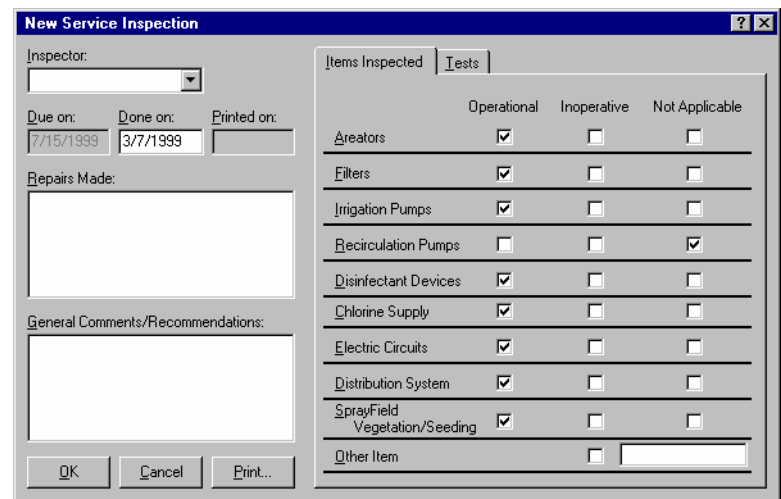
CASST maintains a list of all inspections, through the current date, that are to be made in order to meet the criteria of the current

contract. This list includes all "Past Due Inspections", any currently "Due Inspection" and, if the current date is greater than the currently due inspection date, the "Next Scheduled Inspection Due Date" is also displayed.

All "Past Due" inspections are flagged with a red triangle, ▲. All completed inspections are flagged with a check, ✓. Extra inspections are flagged with a large plus sign, +. The use of these flags provides a very quick and simple way to determine the status of all inspection.

Completing an inspection report is accomplished by double clicking the desired "Inspection Due Date" in the list of inspections or by clicking it to select it from the list of inspections and then selecting the "Complete" button. The "New Service Inspection" form, as show below, will be presented.

When the "Complete" button is selected, the "New Service Inspection" form, as show below, will be presented.



The name of the Service Company "Inspector" should be supplied here.

Please note that, as with all other dropdown list boxes, there are three ways to get the desired information into these boxes.

1. Make a selection from the dropdown list, however, if the desired option is not available, one of the other two options must be used.
2. Use the "Dynamic Data Entry" method. See Dynamic Data Entry on page 18.
3. Use the "Direct Support Data Entry" method. See Using Direct Support Data Entry on page 19.

Using the report as submitted by the Service Company Inspector, check box selections can be made to reflect the conditions reported by the inspector. If any "Tests" were completed, the results of those tests can be recorded by selecting the "Tests" tab. All "Repairs Made" should be recorded by typing them into the appropriate box. Also, any "Comments" provided by the Service Company Inspector should be provided.

When all data about this inspection has been recorded, selecting the "Print..." button can print the report. If no printing is required, selecting the "Ok" button will save the report and close the form.

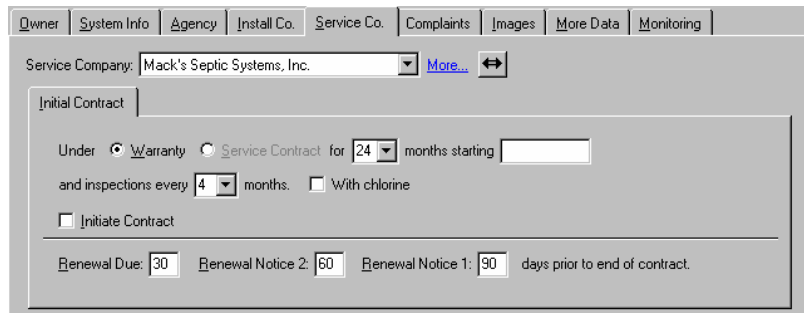
Many other options exist for managing inspections, however, the CASST help file should be consulted for more information about these options.

Maintenance Contract Renewals

As management of the maintenance contract progresses through it's various stages several other events, in addition to the scheduled inspection visits, will begin to occur.

The last of these events is the "Expiration of the Current Contract". This occurs at the specifically scheduled time, as determined by the criteria specified when the "Initialize Contract" was performed.

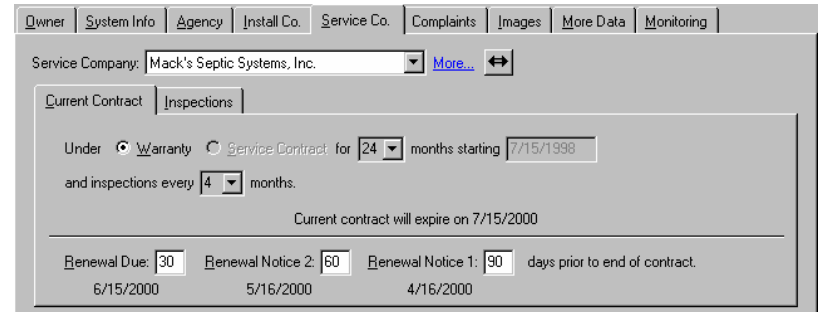
Prior to the "Expiration of the Current Contract", three other events being tracked by CASST will occur. The first of these events is the "First Renewal Notification Date." For a better understanding of these events the "Service Co" tab is again presented below.



Please note that prior to selecting the "Activate System Tracking" button, options were available for setting the intervals at which these other events would occur. The numbers that first appear in the "Renewal Due", "Renewal Notice 2" and the "Renewal Notice 1" text boxes are the default values for the number of days prior to the expiration of the current contract on which the related event should occur.

These defaults are defined in the "Misc/Defaults" tab in the "Support Data" window. See Using Direct Support Data Entry on page 19 for more information. These numbers can be changed for

each individual event on each individual system to reflect when these events should occur. Using these numbers, CASST generates dates on which these events will occur. These dates, including the "Current contract expiration date," are then displayed on the "Initial Contract" tab after the contract has been initiated as shown below.



When the first of these events, the "Renewal Notice 1" date is reached, CASST will make the "Contract Renewal" tab visible in order that the contract that is about to expire can be renewed at any time.

The number of days in the "Renewal Notice 1" test box determines when the Service Company is to have CASST send the first request for the renewal of a service contract to the system owner. Due to the fact that this function is normally the responsibility of the Service Company, additional information about concerning the use of this feature is only available in the CASST help file.

The number of days in the "Renewal Notice 2" test box determines when the Service Company is to have CASST send the second request for the renewal of a service contract to the system owner. Due to the fact that this function is normally the responsibility of the Service Company, additional information about concerning the use of this feature is only available in the CASST help file.

If the "Renewal Due Date" is reached without the maintenance contract having been renewed, a report (letter), can be printed by the Service Company and sent to the Agency that confirms that this maintenance contract has not been renewed with the current Service Company of record.

This process is repeated for each current contract, whether it is a Warranty type contract or a Renewed Service Contract.

When the "First Renewal Notice Date" has been reached CASST will display the "Contract Renewal" tab as displayed below.

When the "Renewal Contract" tab is displayed the parameters for the new "Service Contract" can be provided and the proposed "Renewal Contract" printed.

When the owner of the system returns the "Renewal Contract" with the payment for the new contract, clicking the "Renewed with our company" button will tell CASST that a new contract is now in place.

If the last "Scheduled Inspection" under the current contract has not been completed or if the "Expiration Date" for the current contract has not been reached, the "Renewal Contract" tab will be changed to "Renewal Contract Pending", as shown below.

Date Due	Date Done
5/21/1999	
✓ 1/21/1999	1/12/1999
✓ 9/21/1998	9/21/1998
✓ 5/21/1998	5/5/1998
✓ 1/21/1998	2/12/1998
✓ 9/21/1997	9/5/1997

Only when the current contract has been completed will the Renewed Contract become the Current Contract.

Handling Complaints

Complaints are also an intricate and necessary part of the management of Onsite Wastewater System. It is inevitable that complaints will be called in and must be resolved in some manner. CASST handles complaints in a special area.

New Complaints

When a new complaint is called in, the user can simply use the "Lookup" option button from the Tool Bar to display the "Lookup" options dialog box. Using these options the system

for which the complaint is being lodged can be located. By selecting the "Complaints" tab the screen shown below will be displayed.

When this screen is display, selecting the "New" button will present the dialog box shown below, where the information about this new complaint can be recorded.

Entries for the initials of "Agency Rep", the person taking call, are requested first. The current date and time is defaulted in the next text box. The name of the person registering the complaint is then requested. Next is a phone number where the person registering the complaint can be contacted.

The "Problem" data entry box is a "memo" type field in which a description of the problem being reported can be typed. If more text is entered than can be displayed in the visible area of the "Problem" box the "arrow" keys can be used to scroll through it.

One other, very important, option is presented in this screen. The "Requires an inspection" check box is to be used to indicate whether or not an actual visit is required by an Agency Inspector or not.

Inspection Required

If the "Requires an inspection" check box is checked during the initialization of the complaint this would indicate that a visit to the site was expected. No other noticeable difference will be seen at this time. However, under this condition, when the complaint is being completed, an Agency Inspection form for recording the results of the visit will be presented as shown below.

	Operational	Inoperative	Not Applicable
Aerators	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Filters	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Irrigation Pumps	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recirculation Pumps	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Disinfectant Devices	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Chlorine Supply	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Electric Circuits	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Distribution System	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SprayField	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vegetation/Seeding	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

When this form has been completed a copy of the report can be printed. Additional options could also be utilized at the time of the printing of the report, thus allowing for the sending of the report to others. Selecting the "Ok" button will save the report and close the form.

Inspection Not Required

If the "Requires an inspection" check box is left unchecked during the initialization of the complaint this would indicate that a visit to the site was not expected. No other noticeable difference will be seen on the screen at this time. However, under this condition, when the complaint is being completed, the screen shown below will be presented.

All that would be required, under this condition, to complete the recording the results of the complaint would be to enter the date it was resolved and any comments about how it was resolved.

Entering and Using Support Data

Dynamic Data Entry

The concept of "Dynamic Data Entry" is that in the event that the item needed by the user is not already in the dropdown list box, the user can simply type directly into the dropdown list box and press the "Tab" key. Upon doing this, CASST will display the following a dialog box alerting the user that the entry is not in the list and asking if it should be added.

Lets look at an example of using "Dynamic Data Entry." In this example we will add an "Installation Company" to the "Installation Company" dropdown list box on the "Install Co." tab.

Example:

1. From the main screen of CASST, select the "Install Co" tab the cursor should be located in the "Installation Company" dropdown list box.
2. With the cursor in the " Installation Company " dropdown list box, type the name of the Installation Company you want to add to the list and press the "Tab" key. The following dialog box will be presented.

- Click on the "Yes" button or press "Enter" and the "Installation Companies" screen will appear as shown below.


Type	Number	Ext
Business		
Business 2		
Business Fax		
Assistant		

- Provide any addition information for this record.
- After completing all desired data in this screen, click on the "OK" button to accept and save the new data entries. The previous screen will again be displayed.

Using Direct Support Data Entry

During the normal use of CASST, many dropdown list boxes are displayed. These dropdown list boxes are used during the data entry process for speed as well as ensuring consistency and accuracy. For each of these dropdown list boxes there is additional data associated with each selection in the list.

Each dropdown list box represents a specific category of data. In addition to the "Dynamic Data Entry" method described above for entering "Support Data" for each category, all categories of "Support Data", including "Defaults" can be managed from one screen by accessing the "Support Data" window.

To access the "Support Data" window, select the "Support Tables" button, , from the CASST "Tool Bar" shown below.



The "Support Data" window will be displayed as shown below.

Type	Number	Ext
Phone		
Phone 2		
Fax		
Mobile		

Select the Tab that represents the category of data for which data entry is desired, and complete as much of the requested data as possible.


NOTE: Due to the fact that CASST can be licensed as an Agency, an Installation Company, a Service Company, a Distributor, or a Manufacturer, the option for changing the name listed in one or more of the tabs shown here may be prohibited, depending on how CASST is licensed. If an item is "grayed out", it can not be edited.

Following is an example of entering the data needed to provide the data for a Manufacturer. In this example we will add a new Manufacturer and then associate the new Manufacturer with the specific "Brand Name" for their product. During the use of CASST the selection for a "Brand Name" will cause the Manufacturer to also be selected and displayed.


Example of Direct Data Entry of Support Data:

In the "Support Data" window, select the "Manufacturers" tab and enter the name of the Manufacturer and any other available information about this Manufacturer in the screen displayed below.

After completing all desired data entry in the "Manufacturers" tab, select the "Brands" tab and the data entry screen depicted below will be presented, where the desired information can be entered.

Use the  button at the right end of the "Manufacturers" list box to reveal the list of "Manufacturers." Select the desired Manufacturer from the list. Press the "Tab" key to move to the "Brand" text box. Type the desired "Brand Name." After completing the desired data entry, select the "Close" button,

which will save all entries and close the "Support Data" window.

The  button at the right end of the "Brand" list box on the "System Info" tab can now be used to display the list of available "Brand Name" selections. Select the desired "Brand Name" and the Manufacturer of this brand will automatically be entered in the "Manufacturer" text box.

NOTE: Once entries have been made for any of the categories in "Support Data", reusing this information is as simple as making a selection from a pull down list.

Recording Agency Site Visits

Occasionally there is a need for a representative of the Agency to make a visit to a particular site. Using CASST, these visits can now be recorded and tracked.

To record a site inspection report from the Agency Representative select the "Agency" tab. (See the "Agency" tab shown below.)

The "Inspections" box displayed to the right side of this tab will be used to list and record these inspections.

Selecting the "New" button will present the "New Agency Inspection" report form shown below.

The name of the Agency Representative that made the visit to the site should be provided by typing it in. No dropdown list is provided for listing these representatives. All other information can be entered as required.

When data entry is completed, selecting the "Ok" button will save the data and close this form.

Data Entry Process for New Systems

Although very similar to entering data for an existing system, covered previously in this document, the data entry process for a system that is to be installed is just a little different.

The steps for doing this entry process start with providing the required data for issuing the permit to construct the system.

Issuing a Permit

Providing the data required for the issuance of the permit should start with the "Property Information." The required entries are the "Property Address", the "City", "State" and "Zip Code" and the "County where the property is located.

Next, the "Owner" tab should be selected and the owner's information completed. The more complete the data entry for categories of information is, the more efficiently CASST can be used to track and report maintenance contract activities.

Next the "System Info" tab should be selected. Other than the default data the entries needed in this tab are the selection of the "Brand Name".

Please note that, as with all other dropdown list boxes, there are three ways to get the desired information into these boxes.

1. Make a selection from the dropdown list, however, if the desired option is not available, one of the other two options must be used.
2. Use the "Dynamic Data Entry" method. See **Dynamic Data Entry** on page 18.
3. Use the "Direct Support Data Entry" method. See **Using Direct Support Data Entry** on page 19.

Next select the "Install Co." tab and provide the name of the Installation Company, the name of the Installer, using one of the methods described above for entering data in the dropdown list boxes. Any other information that is available and being requested on this tab for the "Install Co." should be enter at this time. The actual "Install Date" will not be available at this time. It will be entered later.

Next, select the "Agency" tab. The essential data needed in this tab is the "Permit Number" and the "Issue Date." When this information has been provided, the "Permit" could be printed using the print button provided.

Operation Approval

In many instances, the next activity the Agency will encounter, following the issuance of the permit, is the inspection for the Approval of the System for Operation. To record this activity, the minimal requirement is to select the "Agency" tab and enter the "Approval Date." The "Approval Date" is considered to be the date that the approval for the operation of the system was given by the Agency Representative.

The above-described action is all that is absolutely required to record the action taken by the Agency Representative. However, an option has been provided for recording in more detail the actual visit information. By adding an inspection record, the actual visit activities can be recorded.

If the features of CASST for the tracking of future inspection visits and other maintenance contract activities are to be utilized by the Agency, an action to initiate the contract is required. See "Activating a Maintenance Agreement Contract" below.



Activating a Maintenance Agreement Contract

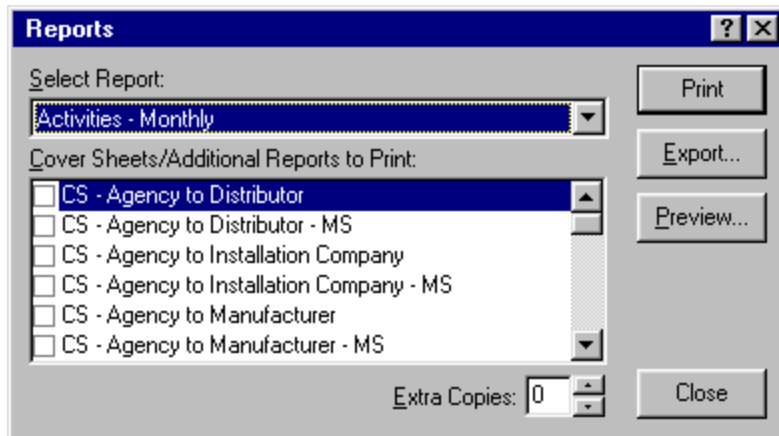
When the "Approval Date" is entered on the "Agency" tab, it will be defaulted to the "Install Date" on the "Install Co." tab


and to the "starting" date on the "Service Co." tab. To complete the require actions to start the tracking process in CASST, click on the "Service Co." tab and provide the name of the "Service Company. Move the cursor to the "starting" date field on the "Service Co." tab.

When the "starting" date for the "Initial Contract" is correct and the other criteria are correct, the "Activate System Tracking" button must be clicked. When clicked, a confirmation dialog box will be presented. If the information about the current contract displayed in this box is correct selecting the "OK" button will complete the "Initialize Contract" process. The values provided and accepted during this process can no longer be changed without deleting the record for the entire system and re-entering it

Reporting from CASST

Any printout from CASST is referred to as a "report" or a "cover sheet". (See the description for a report and a coversheet later in this document.) Reports can be printed from several locations in the program, including the pull down Menu, the Reports Icon, , on the Tool Bar as well as several print buttons, , located in various appropriate places. When any of these methods are used, the results is that the user is presented with options for printing from the "Reports" window, shown in **Figure 2** below.



When this dialog box is called from the pull down Menu or the Icon, , on the Tool Bar all options are available for both "reports" and "coversheets."

"Reports" are classified as any document that is produced by CASST, which is autonomous. These can be as detailed as an "Activities Report". These reports can be as simple as a "Notification of No Valid

Contract" or a "Did Not Renew Notice". In all cases these "reports" contain information that can be presented with the aid of other documentation.

"Cover Sheets" are documents that provide the users return address and the address of the recipient. These "Cover Sheets" can be printed as an addition to other reports, as dictated by the need to send the selected report to various recipients. These "Cover Sheets" are denoted by the "CS" prefix in the report name. Selecting more than one "Cover Sheet" will tell CASST to print a copy of the selected report for each of the selected "Cover Sheet". If and extra printed copy of the selected report is needed, the number of extra copies can be specified.

CASST has several reports that provide information about "Inspection" activities, such as "Inspections Due This Month", "Inspections Due Next Month", and "Inspections Due Last Month". These reports print a list of those systems needing inspection visits during the specified time period. These reports are typically used in organizing inspection activities. If these reports are run without having selected any "Cover Sheets or Additional Reports to Print:" the list of due inspections will be printed. More reporting power is available when printing these reports by making selections from the "Cover Sheets/Additional Reports to print:" list. Selecting the "Inspection Report - Service Company - Blank" and the "System Profile" reports from the "Cover Sheets/Additional Reports to print:" list with one of the "Inspection Due ..." reports will not only print the list of inspections due but also print a blank inspection report with the Owner and System information already printed on it and also "System Profile" report which lists details about a system including the record of the last six visits and the results of those visits, for each system listed on the selected "Inspection Due ..." report.

Also when printing "Service Calls Requests" the "Inspection Report - Service Company - Blank" and the "System Profile" reports can also be selected to provide support and information to the Service Company representative that is to make the inspection visit.

There are at least two reports that ship with CASST that have two versions the report. These are the "Notice - Renewal 1" and the "Notice - Renewal 1 - MS" reports and the "Notice - Renewal 2" and the "Notice - Renewal 2 - MS" reports. These reports differ in that one is designated with a suffix of "MS" on the report name. The reports that do not have this suffix report on the currently selected system record. The reports with the "MS" suffix report on all systems that meet the record selection criteria for each report.

These reports and their record selection criteria can be described as follows:

Notice - Renewal 1 - MS

This is the first of two letters that can be sent to the Owner of the wastewater systems notifying them that the current maintenance contract for the specifically described system is about to expire. This first renewal notice refers to and quotes the law that requires that an active maintenance contract with an approved Service Company must remain in place. It also states that the renewal of this maintenance contract must be in place no less than thirty (30) days prior to the end of the current contract.

This report is designed to be sent from the "Service Company" to the "Owner" and therefore should have a "Cover Sheet" with the "MS" suffix selected when printed. When this report is run, CASST will prepare one of these notification letters for each System Owner where the current date is greater than the "Notice - Renewal 1" date and less than the "Notice - Renewal 2" dates. These dates are calculated using the "number of days prior to the end of the current contract" specified by "default" entry or by actual entry by the user for each of these notices. These dates are displayed on the "Current Contract" tab of the "Service Co." tab. When this report is run, CASST not only prepared the letter to the Owner but also sets a flag on all system records for which the report is printed. This flag will prevent CASST from automatically preparing another letter for this system. In other words, CASST will only print this notice once for each system during each contract. When a renewal contract is implemented for this system, the flag for printing this notice is reset and will again print this notice for the renewed contract when it reaches the appropriate time.

Notice - Renewal 2 - MS

This is the second of two letters that can be sent to the Owner of the wastewater systems notifying them that the current maintenance contract for the specifically described system is about to expire. This second renewal notice refers to and quotes the law that requires that an active maintenance contract with an approved Service Company must remain in place. It also states that the renewal of this maintenance contract must be in place no less than thirty (30) days prior to the end of the current contract. This second renewal notice has the words "Second Notice" printed in large letters in the background of the notice.

This report is designed to be sent from the "Service Company" to the "Owner" and therefore should have a "Cover Sheet" with the "MS" suffix selected when printed. When this report is run, CASST will prepare one of these second notification letters for each System Owner where the current date is greater than the "Notice - Renewal 2" date and less than the "Renewal Due" dates. These dates are calculated using the "number of days prior to the

end of the current contract" specified by "default" entry by CASST or by actual entry by the user for each of these notices. These dates are displayed on the "Current Contract" tab of the "Service Co." tab. When this report is run, CASST not only prepared the "Second Renewal" letter to the Owner but also sets a flag on all system records for which the report is printed. This flag will prevent CASST from automatically preparing another "Second Renewal" letter for this system. In other words, CASST will only print this notice once for each system during each contract. When a renewal contract is implemented for this system, the flag for printing this "Second Renewal" notice is reset and will again print this notice for the renewed contract when it reaches the appropriate time.

To use most of the reports in CASST, the user should simply use the "Look-up" feature to locate the system for which a report or document is to be printed and then select the desired report or document from the "Select Report" drop-down list. Next, the selection of any "Cover Sheets/Additional Reports to Print:" should be made.

To utilize the real power of CASST for its reporting capabilities, the use of those reports with the "MS" suffix should be used. To use these reports, the user would simply open the "Reports" dialog box by selecting the "Reports" button on the toolbar or by selecting the "Reports" option from the "Reports" pull-down menu and then select the desired report with the "MS" suffix. If "Cover Sheets" are desired for these reports, the appropriate "Cover Sheet" with the "MS" suffix must be selected.

NOTE: When a "Report" with a suffix of "MS" is used, any additional "Cover Sheets/Additional Reports to Print:" must also have the "MS" suffix.

In addition to the "CS" prefix for "Cover Sheets" and the "MS" suffix for Multi System reporting, the suffix of "WC" indicated that a special "Cover Page" will be printed with the report. The suffix of "BG" indicates that the report will use the "Grid Number" as part of its sorting criteria.

Because CASST provides a great deal of flexibility in reporting, the process for printing reports and documents may seem a little confusing at first, however, with a little practice and experience you will be able to utilize the power of CASST in a simple and efficient manner.

Graphic Images and CASST

CASST, Version 2, now supports the attachment of graphic files to the record of an individual system. These graphic images are not actually stored in the database file with the other data about the system, but can be stored in a location specified by the user. Only the path to the image

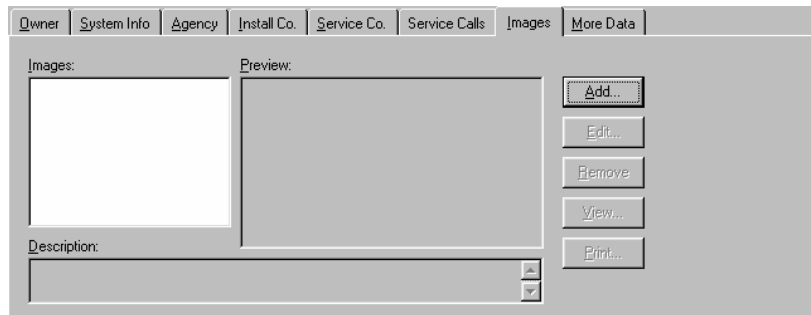
is stored in the database. This method not only saves valuable space in the database but also allows for more flexibility in where the actual graphic files are stored and how they are organized.

NOTE: CASST does not create any graphic files but does provide viewing and printing capabilities.

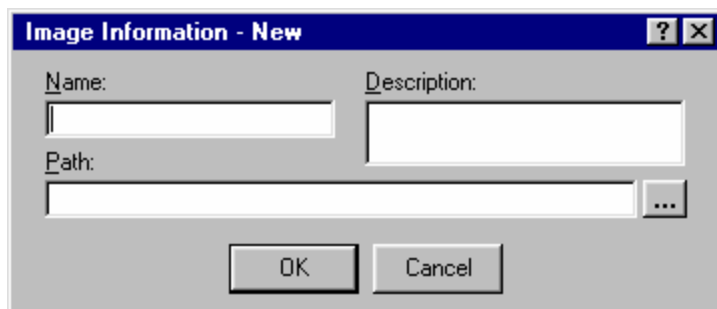
CASST supports the following types of graphic files: bmp, jif, jpg, wmf, emf, and dwf. These are standard graphic file formats. The kinds of files that can be attached include scanned documents, pictures (taken with both digital cameras and even pictures taken with other types of cameras and processed to disk), and even drawing files from drafting software programs. (The .dwf format is the format from AutoDesk that was developed for Internet use. If a drafting software program can save a file to this format, CASST can not only display and print it, but can actually provide pan, zoom and layer control from within CASST.)

The default path for the location where the graphic files are to be stored is "C:\CASST2\Images". This default location can easily be changed using the "Options" selection from the "Tools" menu on the pull-down menu. Before any graphic images can be attached to a system record, the graphic must first be saved to disk in a location accessible to CASST.


The "Images" tab is shown below:



Click the "Add" button to attach an image to the current record. The "Image Information - New" dialog box will be displayed as shown below.



A descriptive "Name" for the graphic you are about to add must be provided. This name is for display purposes only, and has no relevance to the actual file name. Two names, "Map" and "Legal Description", are special to CASST and should be reserved for use as defined by CASST.

The  button at the end of the "Path" text box will present the "Select Image File" dialog box from which the file can be located. When the file has been located, select the "Open" button to place the path to this file in the "Path" text box.

The "Description" text box is an optional entry box. A description can be added later, even from the "Image Information - New" dialog box if desired.

After making these entries, select the "OK" button and the name will appear on the left side of the "Images" tab. To preview this image, simply select its name and it will be visible in the preview window on the right.

The only limit to the number of graphic files that can be attached to a system record is only limited by the amount of hard drive space available.

A Map Image

If a map to the location of the system is available (these can be acquired over the Internet) the map can not only be attached, but it will be available from the "System Info" tab.

To attach a "Map" and have it available from the "System Info" tab, start by selecting the "Images" tab and select the "Add" button.

For the "Name" type the word **Map**.

Provide the "Path" to the map that is to be attached to the system record.

When these items have been provided, select the "OK" button and the "Map" name will be added to the images list on the left side of the "Images" tab. The "Map" can not only now be previewed from the "Images" tab, but from the "System Info" tab as well.

Select the "System Info" tab and locate the "[Map](#)" hotspot, located just above and to the right end of the "System Notes" memo field. Click on this hotspot and the "Map" will be presented in the preview window. To close the preview window, simply click the "X" in the upper right of the window.

NOTE: The preview window can be resized as desired. When it is closed, CASST retains the size of the preview window and the next time the preview window is

opened, it will return to the same size it was when it was closed.

A Legal Description Image

Legal descriptions can be quite lengthy and can be very difficult to retype. CASST provides a more simple and easy way to have the legal description available for any system.

The actual "Legal Description" can normally be acquired from public records at the county courthouse. If such a document can be acquired it can then simply be scanned, thus saving it to a graphic file format that CASST can display.

To attach the "Legal Description" and make it readily available, first select the "Images" tab and select the "Add" button.

For the "Name" type the words **Legal Description**.

Provide the "Path" to the scanned image of the legal description that is to be attached to the system record.

When these items have been provided, select the "OK" button and the "Legal Description" name will be added to the images list on the left side of the "Images" tab. The "Legal Description" can not only now be previewed from the "Images" tab, but from the "Property Information" area of CASST as well.

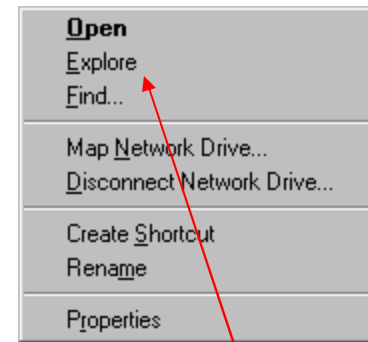
Locate the **"Legal Description"**, located just to the right end of the "Grid #" field. Click on this hotspot and the "Legal Description" will be presented in the preview window. To close the preview window, simply click the "X" in the upper right of the window.

NOTE: The preview window can be resized as desired. When it is closed, CASST retains the size of the preview window and the next time the preview window is opened, it will return to the same size it was when it was closed.

in this directory. If the program was installed anywhere other than the default directory, the "Data" directory would be a sub-directory below the directory where the program was installed. If the user does not know what directory the program was installed in, then the Windows "Find" feature may have to be used to locate the file that we want to backup. (See "Using the "Find" feature to locate the CASST data file" later in this document)

To actually backup the data file, we will need to open the Windows Explorer.

To open the Windows Explorer, place the mouse cursor over the "My Computer" icon on the main desktop and click once with the Right mouse button. A small menu, as depicted below, will be displayed.



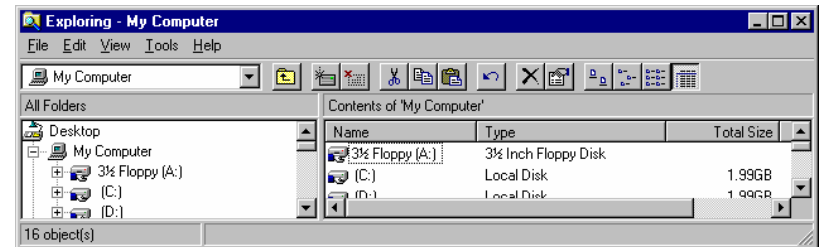
From this menu, select the "Explore" option. The Windows Explorer, shown below, will be displayed. (Not all of the items listed in this example will be in your listings)

Backing up the CASST Data

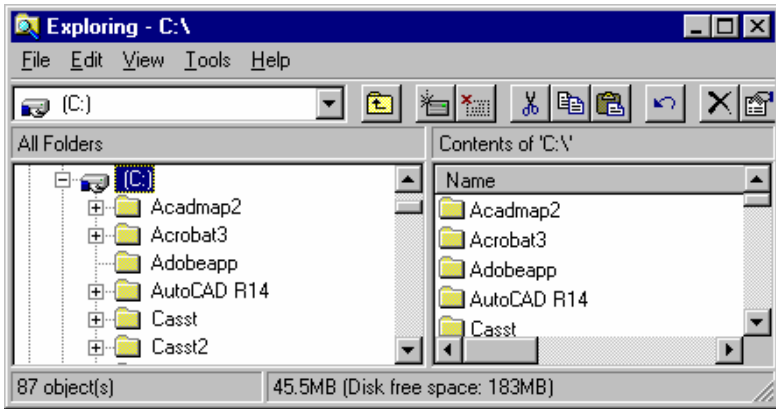
The data that is entered into CASST, Version 2.1, is all stored in one file.

This file is located in the "Data" sub-directory below the actual directory where the program was installed. For example, the default installation directory for CASST, Version 2.1, is "CASST2". This directory is directly below the Root Directory or C:\.

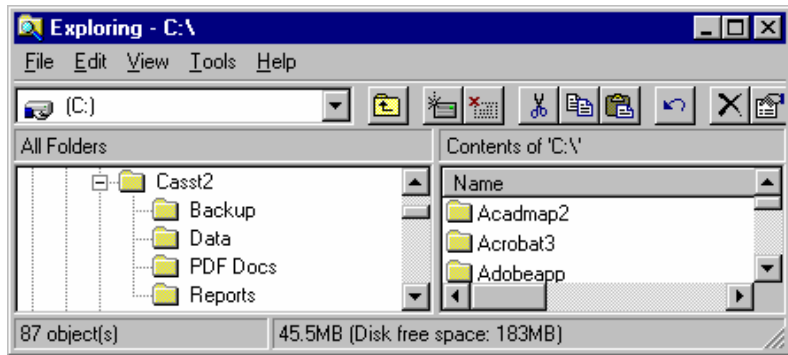
NOTE: If the program was installed to the default installation directory, then the "Data" directory will be a sub-directory



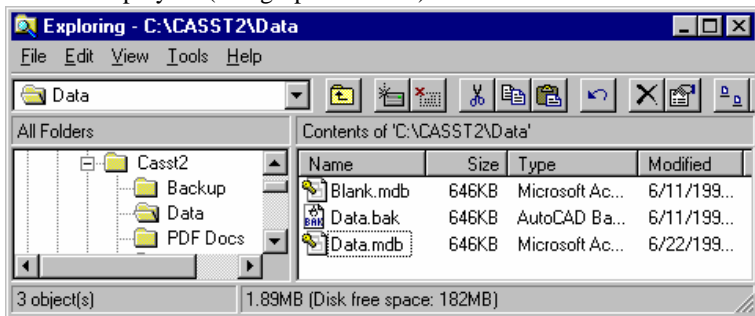
Locate the (C:) drive. There will be a plus sign (+) to the left of this drive letter. Click on the plus sign. The list of directories on this drive will then be displayed. (See graphic below.)



You will see a different list of folders in your Explorer that is show here. Locate the "Casst2" Directory below the "(C:)" drive. There will be a plus sign to the left of the "Casst2" Directory. Click on the plus sign to display the list of all sub-directories that are below this directory. (See graphic below.)



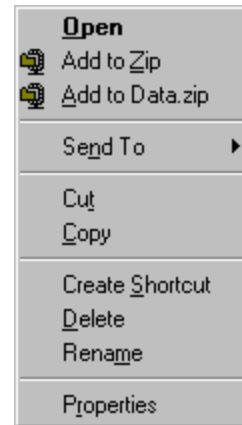
Once again, you will see a different list of folders in your Explorer that is show here. Locate the "Data" sub-directory and click on the word "Data". A list of the files that are contained in this folder will be displayed. (See graphic below.)



Please note that there is other information available about these files.

Locate the file named "Data.mdb". Donot be concerned if you do not see the ".mdb" extension, on the file name. Just locate the file name "Data" without any extension. Windows defaults to not display certain file name extensions. Please note the size of this file. (The size column is located just to the right of the file name column.) If this file size is greater that 1,440 then other action will be required to backup this file.

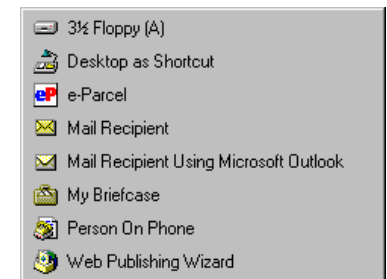
When you have located this file name, place the mouse cursor over this file name and click with the Right mouse button to display the menu depicted below.



You may not have some of the options shown here in this menu. However, you will have the ones necessary for what we are doing.

Move your mouse cursor over the "Send To" option and pause. Another menu will be displayed as shown below.

From this menu, select the 3 ½ floppy (A) option.



This will cause the "Data.mdb" file to be copied to the 3 ½ Floppy disk.

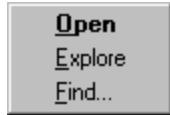
We strongly suggest that you should deep a second backup copy of you data files in a location away from your normal work location.

When the copy process is complete you can close all Windows including the Explorer and remove the 3 ½ floppy disk from the floppy drive and put it some where for safe keeping.

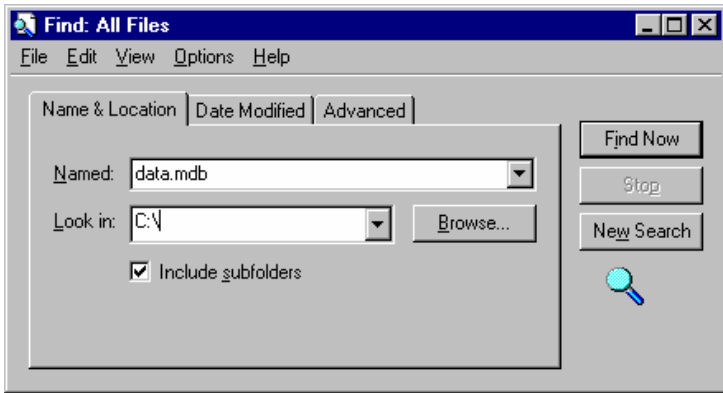
Using the "Find" feature to locate the CASST data file

When you do not know just where the "Data.mdb" file is located, Follow these instructions to locate it using the Windows "Find" feature.

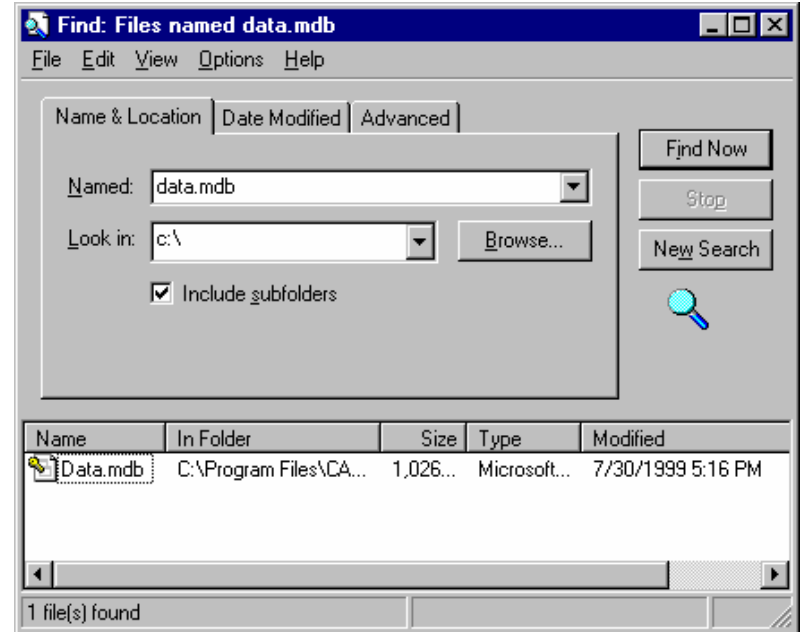
Place the mouse cursor over the "Start" button and click the Right mouse button to display the menu depicted here.



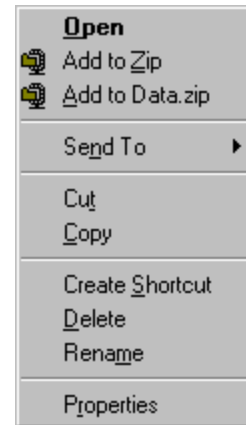
From this menu select the "Find..." option to display the "Find" dialog box as displayed below.



In the "Named:" box, type in "data.mdb" as the name of the file that you want to find. In the "Look in:" box, type in "C:\" as where to look for the file and then click on the "Find Now" button. The following dialog box will be presented and if the file is located, it will be listed as shown below.

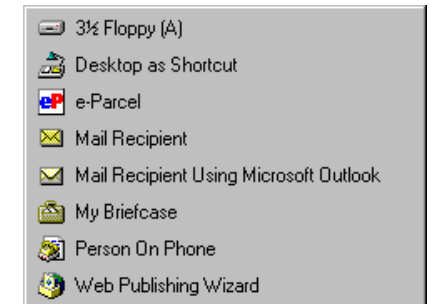


Now that the file has been located, place the mouse cursor over the file name and click with the Right mouse button to display the menu depicted below.



Move your mouse cursor over the "Send To" option and pause. Another menu will be displayed as shown below.

From this menu, select the 3 ½ floppy (A) option.



This will cause the "Data.mdb" file to be copied to the 3 ½ Floppy disk.

We strongly suggest that you should deep a second backup copy of you data files in a location away from your normal work location.

When the copy process is complete you can close all Windows including the Explorer and remove the 3 ½ floppy disk from the floppy drive and put it some where for safe keeping.

What to Do When the Data File won't fit on a Floppy Disk?

We suggest using one of two methods for backing up you data file when it is to large to fit on a floppy disk.

The first and least expensive option is to install a software program called "WinZip". We have included a free demo version on the CASST installation CD. This demo software is located in the "Goodies" directory in the "Winzip 7.0" directory. When you have located the "winzip70.exe" file, simply double click it to install WinZip. This is a very simple and easy program to use. When you have installed this program you will be able to "Zip" up you data file before you back it up. This process will reduce the size of the file and it will still fit on the 3 ½ Floppy disk. This process can even be used with multiple disks when the file gets so large that even after "Zipping" it up is still will not fit on one floppy disk.

The second method for dealing with a data file that is to large for a floppy disk is to purchase a "Zip Drive" and a "Zip Disk" from you favorite computer store. This is a more expensive method but it can be used for other things as well and is very convenient.

The option is yours, and good luck.

Using the "Import" and "Export" Features

The Import/Export feature allows a user to export completed inspection report records and then have another user be able to update their records by importing the exported inspection records. This feature has been added to provide even more advantage to CASST users. Each of these features actually have two options for use.

The Import/Export feature was primarily designed to allow one user to export inspection reports to external entities, such as Agencies or Manufacturers. This type of export is known as "Export to Agency".

The Import/Export feature can also be implemented within a single entity. For example, a service company could have multiple people performing required, periodic inspections and service calls using laptops. When inspections have been completed, they would then be exported to the "Master Database" where they would then be imported into the master database at the office.

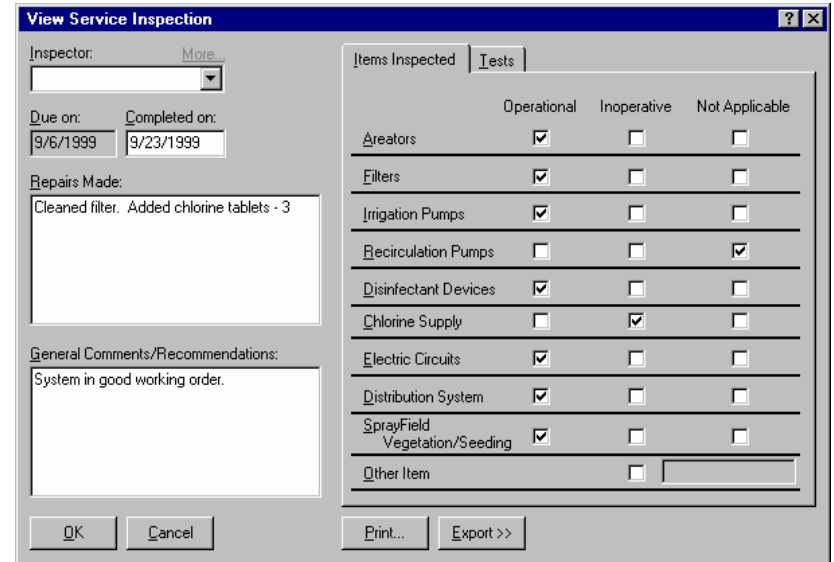



Figure 1

Completing Inspection Reports for Export

All inspection reports should be completed as usual, even if the user is planning to export and not print these inspection reports.

When an inspection report is completed, it is flagged internally in CASST as being available for export both to Master Database and to Agency. This flag provides the information to tell CASST which inspections to export at any given time.

A new button, the "Export>>" button, , has been added to the Inspection Report form, see Figure 1, Page 2. When this button is clicked the Inspection Report form will be expanded to display the "Export Options" group of check boxes. Please see **Error! Reference source not found.** below.

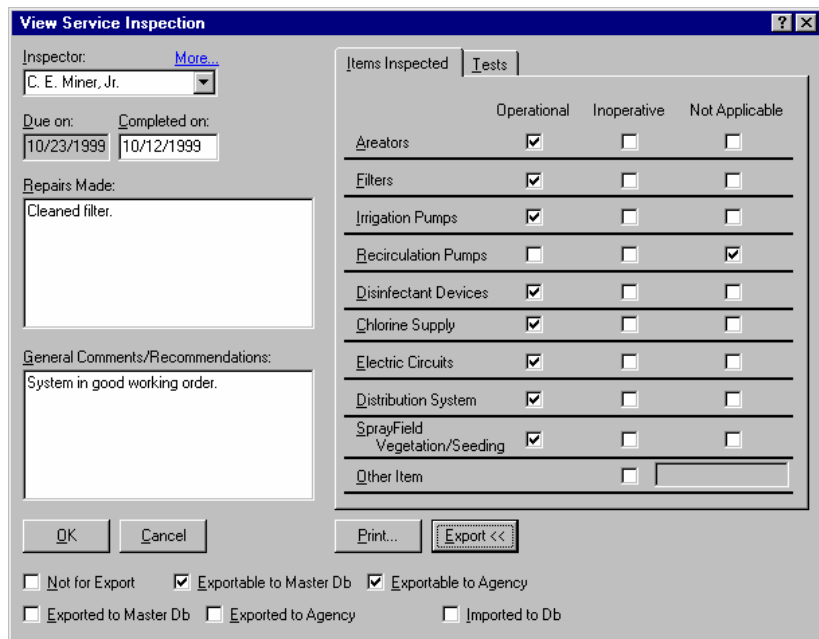


Figure 2

If when completing an inspection report, the user knows in advance that the inspection report will not need to be exported at all, the "available for export" flag can manually be changed by the user by simply clicking on the appropriate option check box. In most cases the user would check the "Not for Export" option to prevent CASST from exporting the current inspection record. The other options available here should be used on an as needed basis by the user for meeting the desired objective for exporting.

Exporting Inspection Reports

No special action is required in order to prepare an inspection report for export. The user is expected to complete all inspection reports as usual, printing and saving all reports as desired.

When all reports are completed, from the "Tools" menu, move the cursor over the "Export" option and then select the "Inspections" option from the fly-out menu.

CASST will present the "Export Inspections" dialog box as depicted below in **Error! Reference source not found.**

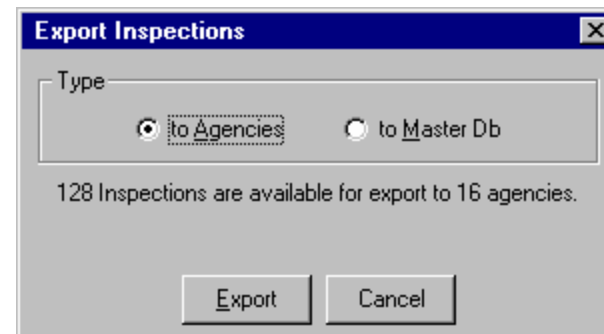


Figure 3

The export feature has two options for exporting. If inspection reports are available for export to any regulatory Agency, the export option "to Agencies" will be pre-selected. If no inspection reports are available for export to a regulatory Agency and inspection reports are available for export to the master database, then the "to Master Db" option will be available and can be selected. If all inspection reports have previously been exported, CASST will present the dialog box depicted below in **Error! Reference source not found.**, informing the user that no inspection are available for export.



Figure 4

Using the "to Agencies" option (see **Error! Reference source not found.**) will prepare a small file for each Agency to which any inspection record is to be sent containing all the inspection records that are to go that that Agency. This file will be saved in the "Export" sub-directory of the CASST2 (CASST installation directory). The file name will be in the naming convention form of the name of the Regulatory Agency to receive the inspection reports, a dash (-) and then the name of the Service Company that is sending the Inspection Reports. For example, if the "Southside Septic Systems Inc" Service Company was sending Inspection reports to the "Johnson County Health Department" the file name would be, "Johnson County Health Department-Southside Septic Systems Inc.mdb".

The files that are made and saved in the Export directory would then be sent to the receiving regulatory authority by e-mail, or by placing the file on a floppy disk or by some other method.

After any inspection reports have been exported, CASST will automatically flag all of the exported inspection reports as "Exported", specifying to whom the file was exported, which will cause all exported inspection reports not be exported again the next time an export is performed. If any inspection report is to be re-exported, the user will be required to lookup the system that has the desired inspection report and then use the "View" option to view the completed inspection. Then click the "Export>>" button and make the appropriate selections in the Export option check boxes, save the changes and then export the inspection reports.

The "to Master Db" option will prepare a file for each Service Company Inspector containing all inspection reports for that inspector that are currently flagged as "Exportable to Master Db" and not flagged as "Exported to Master Db". This file will be saved in the "Export" sub-directory of the CASST2 (CASST installation directory). The file name will be in the naming convention form of "Inspections -) and the name of the Service Company Inspector. For example if the Service Company's inspector was Joe Smith, the file would be named "Inspections-JoeSmith.mdb".

The files that are made and saved in the Export directory would then be transferred to the Import directory of the Master Database by placing the file on a floppy disk or through some other method.

Importing Inspection Reports

The Import option of CASST is designed to allow users to import inspection records exported from other CASST programs.

To import inspection records into CASST, from the "Tools" menu, move the cursor over the "Import" option and then select the "Inspections" option from the fly-out menu. CASST will present the "Import Inspections" dialog box as shown below in **Error! Reference source not found.**

There are two options for importing inspection records. The options will be made available based upon the availability of Exported files in the "Import" directory of the "CASST2. This dialog box displays a pull-down list of the available import files and whom they are from.

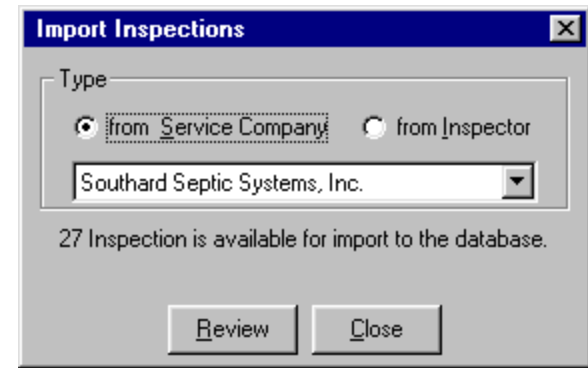


Figure 5

Note: All exported files from other CASST programs that are to be imported into CASST should be placed in the "Import" directory before attempting to import these files.

If files exported from Service Companies exist then the "from Service Company" option will be available. If files exported from a CASST program being used by an Agency exist in the "Import" then the "from Inspector" option will be available. Only when both types of import files are available will both options be made available to the user.

CASST will also display the total number of inspection reports that are available for import.

The "Review" option button is to be selected to preview the inspection records that will be imported. The display of the information about the incoming inspection records differs depending upon the type of inspection records being imported.

When Service Company inspection records are being imported the list of inspection records will be displayed as depicted below in **Error! Reference source not found.**

Various options are available for selecting and managing the available inspection records to prepare them for import. Selecting the "Import" button from this dialog box will import the specified inspection records and update the records of the importing CASST program. See the "Options" section for more information.

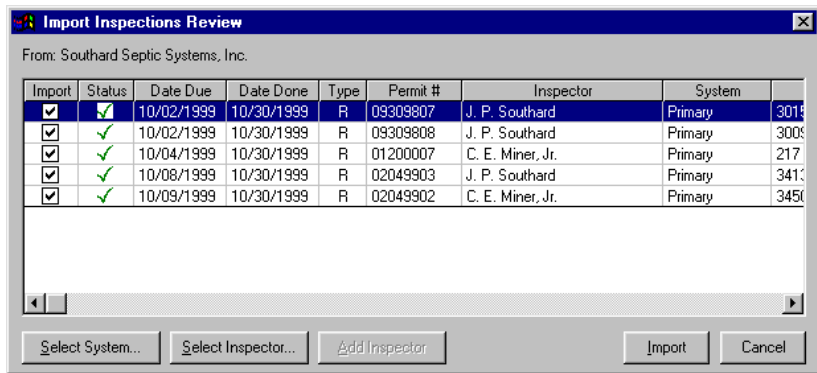


Figure 6

When inspection records from the entity's Inspector are being imported the list of inspection records will be displayed as depicted below in **Error! Reference source not found.**

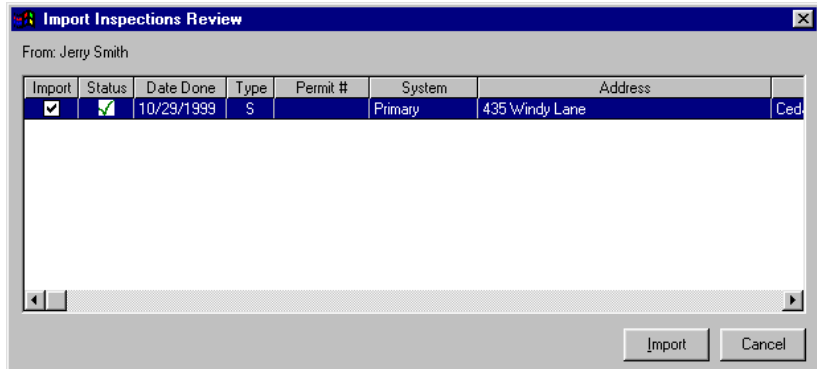


Figure 7

Options and Conditions Explained

Any time that information is being exchanged from one database to another, there exists a potential for error and conflict of information. At import time, CASST makes every attempt to match incoming records with the existing records, however, there may be times when CASST just cannot be completely sure if a certain record matches a record in the current database. In these cases the user is provided with some options for correcting mismatches, making specific record assignments or simply deciding not to import the inspection record.

When inspection records are being imported or exported within an entity, it is assumed that there would be fewer problems with matching records, therefore, there are less options available when importing to the master database. See Figure 7 above. The reason

that there should be less problems with matching records is that it is expected that each off-site user (those working with laptops, etc.) would start with the most recent updated copy of the Master Database at some periodic interval.

When importing inspection records from one entity to another, CASST assumes that there is a potential for more conflicts in matching incoming records with existing records. Several attempts are made to try to match the records.

The first attempt to match the records is based on the Permit Number. If no match can be made on the Permit Number then an attempt is made to match the records based on the Property Address information. If a match is found for the record, then CASST will place a **check mark** in the "Status" column and place a check mark in the "Import" column of that record in the "Import Inspections Preview" dialog box. (See **Error! Reference source not found.** above.) If no match can be found for the record CASST will place a large Red "X" in the "Status" column and will leave the "Import" check box unchecked for that record.

During the attempt to find a match for the inspection record, CASST is also looking for "Duplicate" records. That is, inspection records that appear to already exist in the current database. If CASST finds records that appear to be duplicate records, it will place a large blue plus sign in the "Status" column and will "grey out" the check box in the "Import" column for that record.

CASST will indicate what issue could not be resolved by adding a statement in the "Comment" column. (This column is the last column to the right in the "Importing Inspections" dialog box. The user can resize the form or adjust the width of the columns and/or scroll to the right to see the comment column.) If the record is a duplicate then the word "Duplicate" will be added to the comment column. Other statements will be provided to assist the user in trying to determine the reason that the record could not be matched with existing records.

Another reason that an item may not be checked for immediate import may be that no match could be found for the Inspector. The first criteria that is used for trying to match inspectors is the inspector's license number, if no match can be found for the license number, an attempt is made to match on the actual name. If no match of the name of the inspector can be determined, CASST will again place a large Red "X" in the "Status" column and will leave the "Import" check box unchecked for that record.

In any case where CASST has not been able to resolve matching issues, the user should use the "Select System", the "Select

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Inspector" or the "Add Inspector" buttons to try to resolve the non-matching issues.

The "Select System" option is provided to allow the user to locate and change the specification of the System to which the currently selected Inspection record will be updated. This can occur if there is a slight variation in the spelling or typing of the system information. When this option is selected, the user will be presented with the same dialog box that is displayed when the user selects the "Lookup" button from the CASST toolbar. The user would then use any of the options in this dialog box to locate the appropriate system.

The "Select Inspector" option is provided to allow the user to find and select the correct "Inspector" for this record. CASST may have a problem matching an Inspector's name from one entity to the other due to spelling, capitalization and exact name matching. Not only should the user resolve these discrepancies during the import process, but an attempt should be made to resolve the missing or incorrect license number or name conflict in the "Support Data" tables in order that in the future this same conflict will not continue to occur.

The "Add Inspector" button is only available when an inspector's name appears in the incoming inspection records that cannot be matched in the receiving database. When the export record is created, CASST includes enough information about inspectors that it can allow the receiving user to select and "Add" the new Inspector to their database as an Inspector for the entity that is sending the Inspection records.

When all desired conflict resolutions have been completed, select the "Import" button to import the available inspections.

Note: After importing the inspection records from any available file in the "Import" directory, CASST will rename the inspection reports export file with the extension of ".bak".

Conclusion

Many other features and options are to be found in CASST, Version 2.1. For more information about using all of the many features of CASST, please use the "Help" file that is shipped with CASST or call AppliTech, Inc. for more information on training seminars.

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