

Using the "Import" and "Export" Features

General Overview

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 has 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.

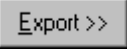
	Operational	Inoperative	Not Applicable
Areators	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Filters	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Irrigation Pumps	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<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 type="checkbox"/>	<input checked="" 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 Vegetation/Seeding	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other Item	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

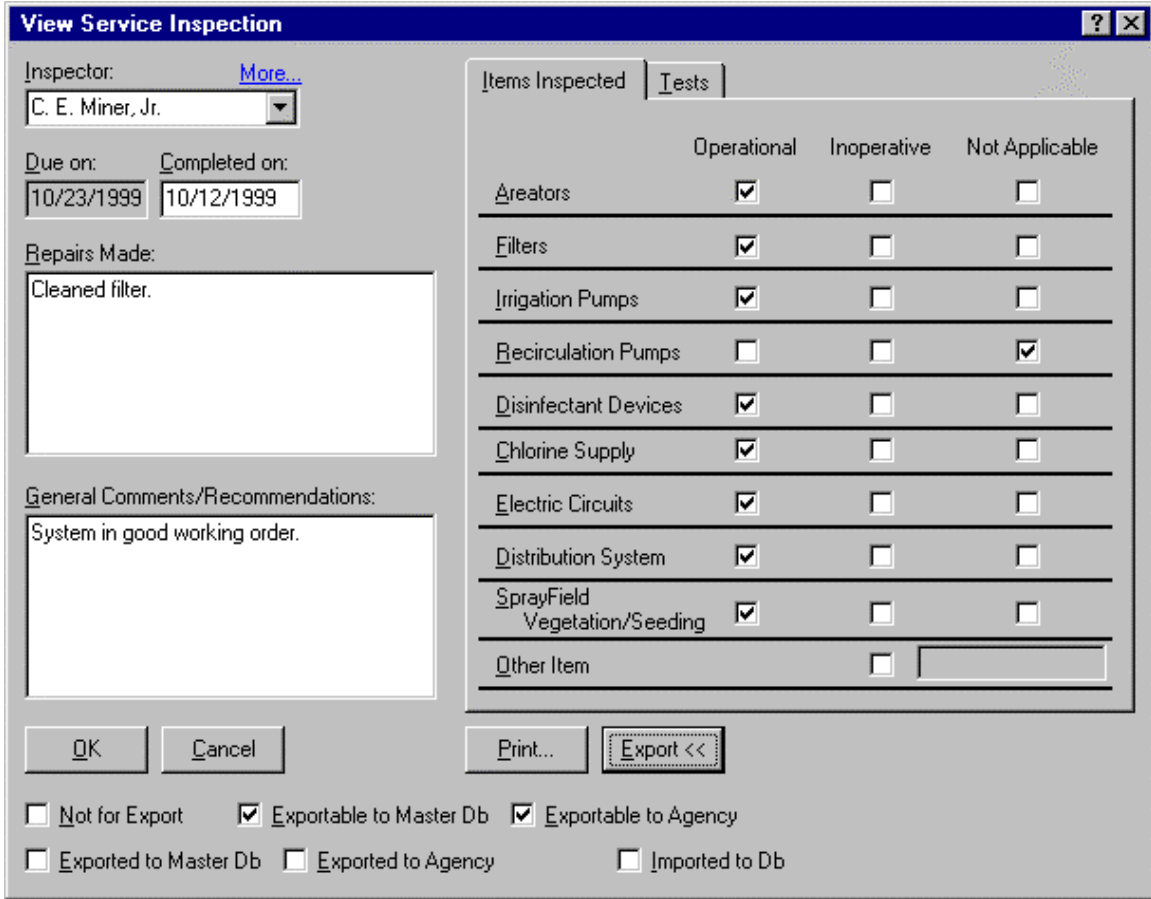
Figure 1

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 1. When this button is clicked the Inspection Report form will be expanded to display the "Export Options" group of check boxes. Please see Figure 2 below.



The screenshot shows a window titled "View Service Inspection" with the following fields and sections:

- Inspector:** C. E. Miner, Jr. (with a "More..." link)
- Due on:** 10/23/1999
- Completed on:** 10/12/1999
- Repairs Made:** Cleaned filter.
- General Comments/Recommendations:** System in good working order.
- Items Inspected Table:**

	Operational	Inoperative	Not Applicable
Areators	<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 Vegetation/Seeding	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Buttons:** OK, Cancel, Print..., Export << (highlighted), Export >> (highlighted in the text above).
- Export Options:**
 - Not for Export
 - Exportable to Master Db
 - Exportable to Agency
 - Exported to Master Db
 - Exported to Agency
 - Imported to Db

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 Figure 3.



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 Figure 4, informing the user that no inspection are available for export.



Figure 4

Using the "to Agencies" option (see Figure 3) 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 Figure 5.

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.

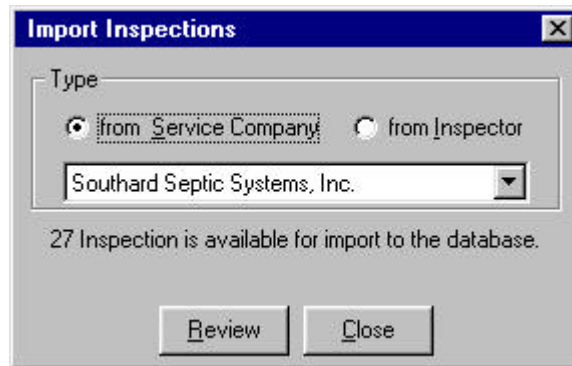


Figure 5

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 Figure 6.

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.

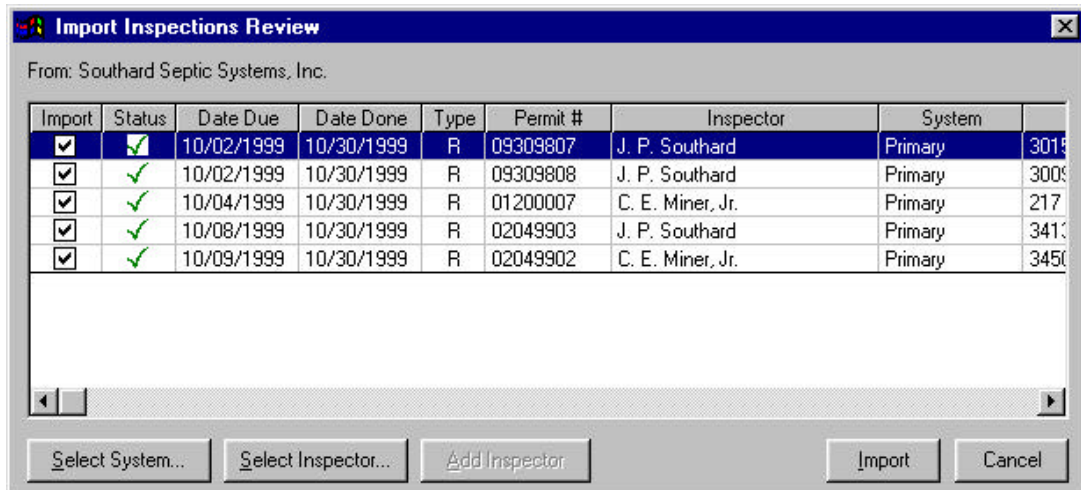


Figure 6

When inspection records from the entity's Inspector are being imported the list of inspection records will be displayed as depicted below in Figure 7.

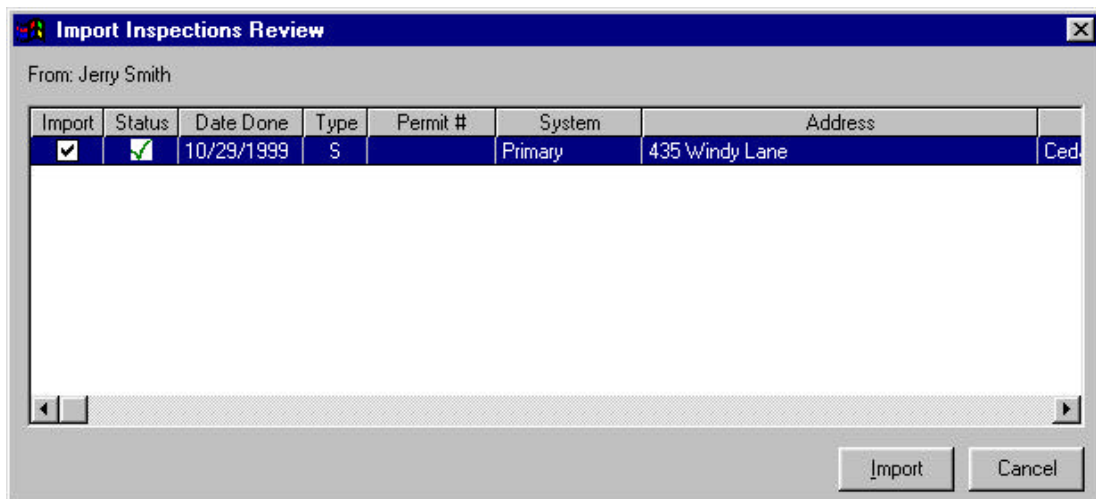


Figure 7

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 Figure 6 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 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".