



Health Department Information System

Helping You...Help Others

Plumbing User Manual



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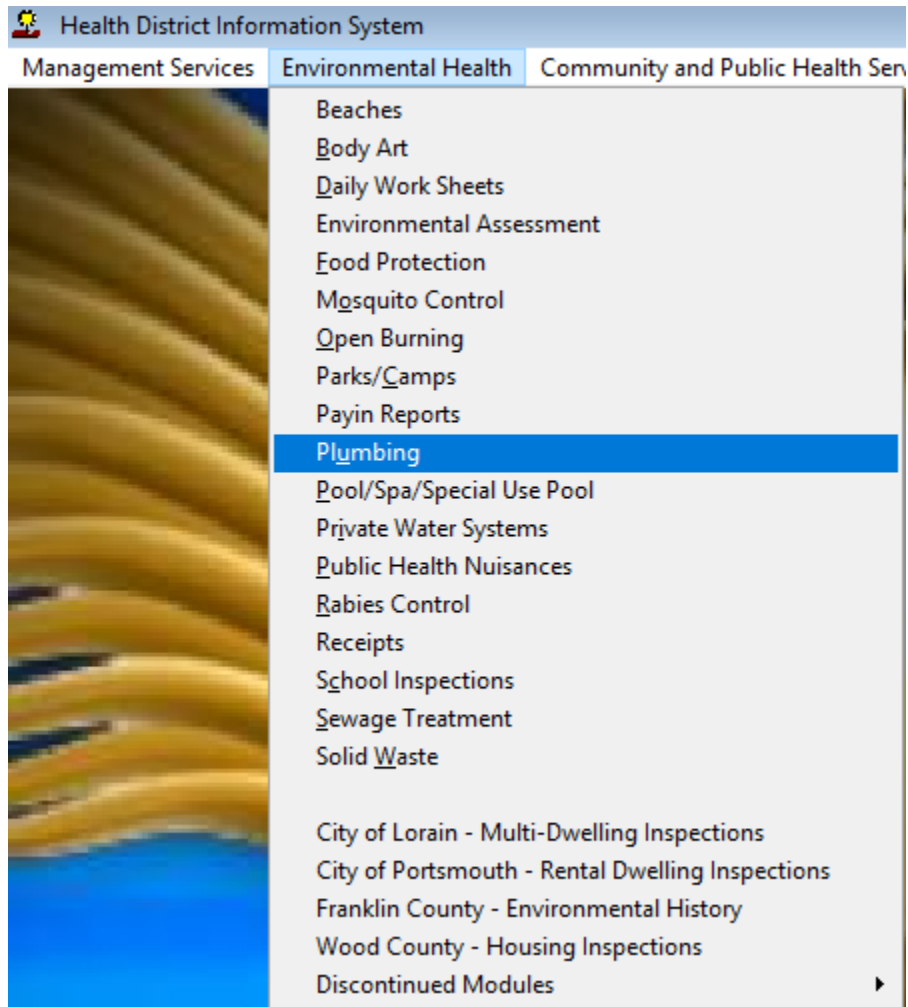
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Chapter 1: Getting Started

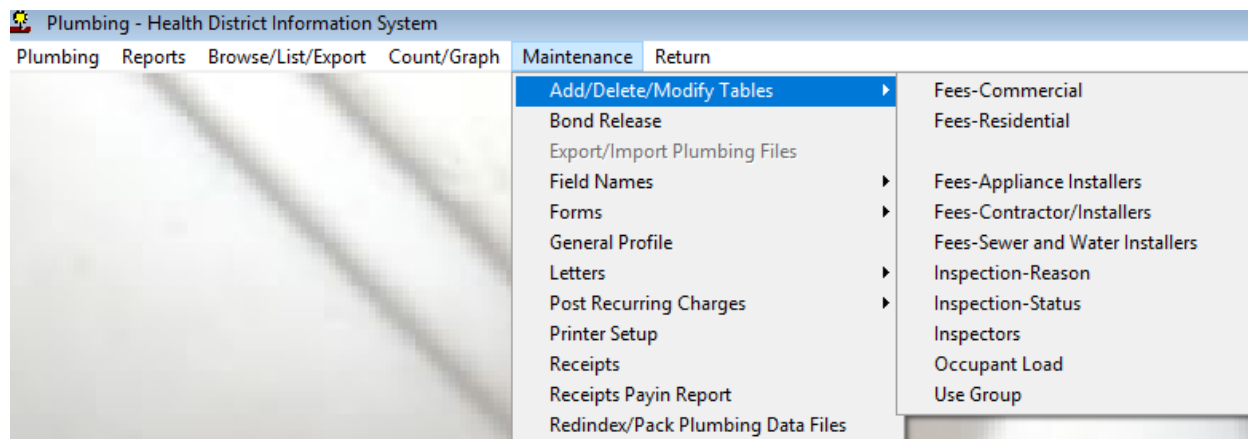
Once the Plumbing module has been installed, it can be accessed by going to:

Environmental Health > Plumbing



Once inside **Plumbing**, navigate to:

Maintenance > Add/Delete/Modify Tables



This section holds the control files that will drive the module.

When entering data into **Plumbing**, there will sometimes be drop-down boxes for quick data entry.

The tables in the **Maintenance > Add/Delete/Modify Tables** section hold the data that fill those drop-down boxes.

Entering the frequently used, fixed data ahead of time will make things a lot easier.

Fees - Commercial

Commercial Plumbing Fees Maintenance Screen

Commercial Plumbing Fees

☒ Active / Future Fees
 ☐ All Fees

Effective Start	Effective End	Code	Description	Amount	State Amount	Recurring	Frequency	System Code

Effective Date Range: / To /
 Fee Code and Description:
 Fee Amounts: Standard 0.00
 Frequency of Recurrence: N/A 0 Months

Fee Properties
☐ Late Fee
☐ Recurring

To enter **Fees - Commercial**, follow these steps (use the tab key to advance to each field):

- Check mark either box: Active/Future Fees or All Fees
- Click on the Add New Code button and begin filling in the appropriate requirements
- Enter the effective date range, fee code, and description
- Type the correct Fee Amounts
- Look at the Fee Properties box on the right bottom of the window, check mark if it is either a Late Fee or Recurring Fee
- If you pick **Recurring Fee**, record the **Frequency of Recurrence**, choose Other to enter a special amount of **Months**

Other options are as follows:

- **Print** button will open printing option's window.
- **Edit Button** allows you to edit a fee
- **Add Cycle** button allows you to add a Cycle to a selected Fee
- Delete button allows you to delete a fee that is selected
- Click the **Save** button to save a fee after updating or entering
- Click **Close** to exit the table.

Fees - Residential

Add/Delete/Modify Residential Plumbing Fees Fees

Code	Description	Local Fee
01	WATER CLOSET	12.00
02	LAVATORY	12.00
03	BATH TUB	12.00
04	SHOWER	12.00
05	URINAL	12.00
06	SINK	12.00
07	WATER DISTRIBUTING SYSTEM	12.00
08	DISHWASHER	12.00
09	GARBAGE DISPOSAL	12.00
10	WASHING MACHINE STANDPIPE	12.00
11	LAUNDRY TUB	12.00
12	WATER HEATER	12.00
13	WATER SOFTENER	12.00
14	FLOOR DRAIN	12.00
15	DRINKING FOUNTAIN	12.00
16	INTERCEPTOR - KITCHEN	12.00
17	AIR ADM. VALVE	12.00
18	BIDET	12.00
19	EMERGENCY EYE WASH	12.00
20	BEVERAGE DISPENSER	12.00
21	EXPANSION TANK	12.00
22	ICE MAKER COMMERCIAL	12.00
23	FOOD PREP SINK	12.00
24	3 COMP SINK	12.00
25	SUMP PUMP	12.00
26	SEWAGE EJECTER	12.00
27	BACKFLOW PREVENTER	12.00
28	ROOF DRAINS	12.00
29	SAND TRAP	12.00
30	SERVICE SINK (MOP)	12.00
31	INTERCEPTOR - GARAGE	12.00
32	DEDUCT METER BAR	12.00

Buttons: Close, Add New Fee, Delete Fee, Print

To enter **Fees - Residential**, follow these steps (use the tab key to advance to each field):

- Click **Add New Fee** and enter a **Code, Description, and Local Fee**
- Click on the Fee you want to Delete and click the **Delete Fee** button

Other options are as follows:

- **Print** button will open printing option's window.
- Click **Close** to exit the table.

Fees – Appliance Installers

[illegible]

To enter **Fees - Appliance Installers**, follow these steps (use the tab key to advance to each field):

- Click **Add New Fee** and enter a **Code, Description, and Local Fee**
- **Update New Fees** button allows you to update the newest fees entered
- Click on the Fee you want to Delete and click the **Delete Fee** button

Other options are as follows:

- **Print** button will open printing option's window.
- Click **Close** to exit the table.

Fees – Contractor/Installers Fees

[illegible]

To enter **Fees – Contractor/Installers**, follow these steps (use the tab key to advance to each field):

- Click **Add New Fee** and enter a **Code, Description, and Local Fee**
- **Update New Fees** button allows you to update the newest fees entered
- Click on the Fee you want to Delete and click the **Delete Fee** button

In HDIS, if you come across a button with an asterisk next to it, that means you must RIGHT-CLICK to use it.

Buttons with an Asterisk:

- Blank Registration #s* - This button will blank registration numbers
- Blank Date Issued* - This button will blank the date issued
- Blank Date Paid* - This button will blank the date paid
- Blank Receipt #s* – This button will blank receipt numbers

Other options are as follows:

- **Print** button will open printing option's window.
- Click **Close** to exit the table.

Fees - Sewer and Water Installers

[illegible]

To enter **Fees – Sewer and Water Installers**, follow these steps (use the tab key to advance to each field):

- Click **Add New Fee** and enter a **Code, Description, and Local Fee**
- **Update New Fees** button allows you to update the newest fees entered
- Click on the Fee you want to Delete and click the **Delete Fee** button

Other options are as follows:

- **Print** button will open printing option's window.
- Click **Close** to exit the table.

Add/Delete/Modify Inspection-Reasons

Name

IR - IRRIGATION

PDI - PLUMBING DRAIN INSPECTION

PFI - PLUMBING FINAL INSPECTION

PRI - PLUMBING ROUGH IN INSPECTION

PWI - PLUMBING WASTE INSPECTION

SEC - SEWER COMMERCIAL

SER - SEWER RESIDENTIAL

WH - WATER HEATER PERMIT

WLC - WATER LINE COMMERCIAL

WLR- WATER LINE RESIDENTIAL

WS- WATER SOFTENER

Close

Add

Delete

Print

- Click **Add** and enter a **Name** to identify the **Inspection Reason**.
- Click on **Inspection Reason**, Click **Delete** to delete the entry.

- **Print** button will open printing option's window.
- Click **Close** to exit the table.

Inspection Status

The screenshot shows a software window titled "Add/Delete/Modify Inspection-Status". It features a list box with a header "Name" and several rows. The first row, labeled "CONSULT", is highlighted in blue. Other visible labels include "FAIL", "PASS", and "RE-INSPECTION". To the right of the list are four buttons: "Close", "Add", "Delete", and "Print". At the bottom left of the list box area, there is a small icon consisting of a vertical bar and a less-than sign (<).

To enter **Inspection Status**, follow these steps (use the tab key to advance to each field):

- Click **Add** and enter a **Name** to identify the **Inspection Status**.
- Click on **Name**, Click **Delete** to delete the entry.

Other options are as follows:

- **Print** button will open printing option's window.
- Click **Close** to exit the table.

To enter **Inspectors**, follow these steps (use the tab key to advance to each field):

- Click **Add** and enter a **Code, Name, and District** to identify the **Inspector**.
- Click **Update Inspectors** button to update the Inspectors list
- Click on **Name**, Click **Delete** to delete the entry.

- **Print** button will open printing option's window.
- Click **Close** to exit the table.

Occupant Load

The screenshot shows a software window titled "Add/Delete/Modify Occupant Load". It contains a table with a single column labeled "Name". The first row of the table is highlighted in blue. To the right of the table, there are four buttons: "Close", "Add", "Delete", and "Print". The window has a standard Windows-style title bar with a close button in the top right corner.

To enter **Occupant Loads**, follow these steps (use the tab key to advance to each field):

- Click **Add** and enter a **Name** to identify the **Occupant Loan**.
- Click on **Name**, Click **Delete** to delete the entry.

Other options are as follows:

- **Print** button will open printing option's window.
- Click **Close** to exit the table.

Use Group

The screenshot shows a software window titled "Add/Delete/Modify Use Group". It contains a table with a single column header "Name". The first row of the table is highlighted in blue and contains the text "CERTIFICATE OF USE SENT". Below this, there are many empty rows. To the right of the table, there are four buttons: "Close", "Add", "Delete", and "Print".

To enter **Use Group**, follow these steps (use the tab key to advance to each field):

- Click **Add** and enter a **Name** to identify the **Use Group**.
- Click on **Name**, Click **Delete** to delete the entry.

Other options are as follows:

- **Print** button will open printing option's window.
- Click **Close** to exit the table.

- Plumbing
 - Commercial
 - Residential
 - Appliance Installers
 - Contractors/Installers
 - Sewer & Water Line Installers

Navigate to: **Plumbing > Commercial**

[illegible]

To add new records click the **Add** button.

Commercial - Location/Owner Tab

From the **Find** tab, go to **Location/Owner**. Click **Add** to enter a new record.

Commercial Plumbing Location: - Building Name: TEST - PERMIT #: 0

Find Location/Owner Plumbing Permit Info Inspections Backflow Downspout/Footer Drain Comments GIS/GPS

ID # 1 Name of Business(if applicable) TEST Record # 1

Street City FILLORY State FL Zip 44444

Building New/Old (N/O) N Used for # of stories 10 Semi-Public Sewage Y (Y/N)

PWS Water Supply (P)ivate), (C)ommunity) or (I)ndividual Political Subdivision 02 BUBONICA TWP

Parcel #

Business Owner Building Owner

First Name Last Name

Business Name Attention

Street

City State Zip Phone Ext Fax

Previous Next Delete Add Modify

Type the appropriate information or use the drop down boxes to accurately fill in the record.

Click **Modify** to change an existing record, **Previous** to see the previous record, **Next** to see the next record, and **Delete** to delete current record.

Commercial - Plumbing Permit Tab

[illegible]

Actions capable of being performed on this screen:

- Fill in appropriate information for a plumbing permit
- Click the **Add Charge** button after filling out the top area information for the permit
- **Log Payment** button logs the payment
- **Save Recurring Charge** button allows you to save the entered charge as recurring
- **Delete Charge** button will delete the charge that has been entered
- **Refresh Charges** button refreshes the table

Other buttons:

- **Drawing** allows you to attach a document with this record
- **Next Available Permit #** selects and enters the next number in sequence
- **Print** button opens printing options window
- **Modify** button allows you to modify an existing record

Commercial - Info Tab

Commercial Plumbing Location: - Building Name: TEST - PERMIT #: 0

Find	Location/Owner	Plumbing Permit	Info	Inspections	Backflow	Downspout/Footer Drain	Comments	GIS/GPS
Plumbing Contractor <input type="text"/>				Plumbing Installer <input type="text"/>				
Underground Inspection Date <input type="text"/>				Waste & Vents/Backflow Inspection Date <input type="text"/>				
Rough-in Approval Date <input type="text"/>				Final Inspection Date <input type="text"/> <input type="checkbox"/> Final Never Completed				
Inspector <input type="text"/> CS <input type="text"/> CAT SCAN				Service <input type="text"/> PWI <input type="text"/> PLUMBING WASTE INSPECTION				
Use Group / Certificate of Use <input type="text"/> CERTIFICATE OF USE SENT				Occupant Load / Certificate of Use <input type="text"/>				
Total # of Fixtures Approved <input type="text"/>		Plan Review # <input type="text"/> 3		Plan Review Date Issued <input type="text"/>				
				<input type="button" value="Next Plan Review #"/> <input type="button" value="Print"/> <input type="button" value="Modify"/>				

Actions capable of being performed on this screen:

- **Next Plan Review #** automatically updates the Plan Review # field in the record with the next number in sequence
- **Modify** will allow you to edit an existing record
- [Print](#) will open up a print menu.

Print Button:

The screenshot shows a 'Print' dialog box with the following options:

- ☒ Plumbing Permit
- ☐ Plumbing Permit (long form-letter)
- ☐ Plumbing Permit (long form-legal)
- ☐ Plumbing Invoice - Additional Fees
- ☐ Envelope-Owner
- ☐ Envelope-Plumbing Contractor
- ☐ Dymo Label -Owner
- ☐ Dymo Label-Plumbing Contractor
- ☐ Certificate of Use
- ☐ Print Invoice
- ☐ Letter A - Contractor
- ☐ Letter B - Contractor
- ☐ Letter C - Contractor
- ☐ Letter D - Location
- ☐ Letter E - Location
- ☐ Letter F - Location
- ☐ Letter G - Location
- ☐ Letter H - Location
- ☐ Letter I - Location
- ☐ Inspection Report
- ☐ Comments
- ☐ Certificate of Plan
- ☐ Downspout/Footer Permit
- ☐ Letter D - Business Owner
- ☐ Letter E - Business Owner
- ☐ Letter F - Business Owner
- ☐ Letter G - Business Owner
- ☐ Letter H - Business Owner
- ☐ Letter I - Business Center
- ☐ Letter D - Building Owner
- ☐ Letter E - Building Owner
- ☐ Letter F - Building Owner
- ☐ Letter G - Building Owner
- ☐ Letter H - Building Owner
- ☐ Letter I - Building Owner
- ☐ Print Invoice by StreetAddress
- ☐ 8 X 5 Index Card
- ☐ Backflow Prevention Report

At the bottom left, there are two buttons: ☒ Preview and ☐ Print. On the right side, there are two buttons: OK and Close.

Print Button

The print menu is the same for all tabs stated and you can print any of the options.

Field/Button	Description
Plumbing Permit	Generates a plumbing permit based on the record
Plumbing Permit (long form – letter)	Generates a plumbing permit in long form as a letter
Plumbing Permit (long form-legal)	Generates a plumbing permit in long form as a legal document
Plumbing Invoice – Additional fees	Generates a plumbing invoice with additional fees
Envelope – Owner	Generates an envelope for the owner
Envelope – Plumbing Contractor	Generates an envelope for the plumbing contractor
Dymo Label – Owner	Generates a dymo label for the owner
Dymo Label – Plumbing Contractor	Generates a dymo label for the plumbing contractor
Certificate of Use	Generates a certificate of use
Print Invoice	Generates a print invoice

Print Invoice by Street Address	Generates a print invoice by street address
8 x 5 Index Card	Generates a 8 x 5 index card
Backflow Prevention Report	Generates a backflow prevention report
Letter A-C Contractor	Generates letters A-C to the contractor
Letter D-I Location	Generates letters D-I with location
Letter D-I Business Owner	Generates letters D-I to the business owner
Letter D-I Building Owner	Generates letters D-I to the building owner
Inspection Report	Generates an inspection report
Comments	Generates a comments printout
Certificate of Plan	Generates a certificate of plan
Downspout/Footer Permit	Generates a downspout/footer permit

Commercial - Inspections Tab

Commercial Plumbing Location: - Building Name: TEST - PERMIT #: 0

Find	Location/Owner	Plumbing Permit	Info	Inspections	Backflow	Downspout/Footer Drain	Comments	GIS/GPS
------	----------------	-----------------	------	--------------------	----------	------------------------	----------	---------

Inspection Date: 03/21/2018
 Plumbing Permit #: 0
 Inspector: CS
 CAT SCAN
 Reason: PDI - PLUMBING DRAIN INSPECTIO
 Status: FAIL
 Plumbing Contractor:
 Memo

Next Previous Delete Add Print Modify

Actions capable of being performed on this screen:

- Click **Add** button and add your Inspection record
- **Previous** button will take you to the previous record
- **Next** button will take you to the next record
- **Delete** button allows you to delete the record
- **Modify** will allow you to edit an existing record, and [Print](#) will open up a print menu.

Commercial - Backflow Tab

Backflow Assembly/Installation Info subtab

Commercial Plumbing Location: - Building Name: TEST - PERMIT #: 0

Find | Location/Owner | Plumbing Permit | Info | Inspections | **Backflow** | Downspout/Footer Drain | Comments | GIS/GPS

Backflow Assembly/Installation Info | Devices and Tests | Tester & Company

Backflow Prevention Assembly Info.

Make

Model

Size

Serial No.

Date Installed

Month Tested

of Backflows Per Address

☐ Water Service ☐ Mech Room

Installation Information

Protecting

Other

Date Replaced Serial No.
 /

Date Replaced Serial No.
 /

Date Replaced Serial No.
 /

Fill-in information about Backflow Prevention Assembly Info and Installation Information on this subtab:

- **Print** button will open up a [print menu](#)
- **Modify** button allows you to edit an existing record

Devices and Tests subtab

Commercial Plumbing Location: - Building Name: TEST - PERMIT #: 0

Find Location/Owner Plumbing Permit Info Inspections Backflow Downspout/Footer Drain Comments GIS/GPS

Backflow Assembly/Installation Info **Devices and Tests** Tester & Company

Date //	Reduced Pressure Devices			Pressure Vacuum Barrier	
	Double Check Devices		Relief Valve	Air Inlet	Check Valve
	1st Check	2nd Check			
INITIAL TEST	<input type="checkbox"/> Closed Tight RP <input type="text"/> PSID <input type="checkbox"/> Leaked	<input type="checkbox"/> Closed Tight <input type="checkbox"/> Leaked	Opened at <input type="text"/> PSID	Opened at <input type="text"/> PSID <input type="checkbox"/> Did not open	<input type="text"/> PSID <input type="checkbox"/> Leaked
REPAIRS AND MATERIALS USED	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
TEST AFTER REPAIRS	<input type="checkbox"/> Closed Tight RP <input type="text"/> PSID	<input type="checkbox"/> Closed Tight	Opened at <input type="text"/> PSID	Opened at <input type="text"/> PSID	<input type="text"/> PSID

Previous Next Delete Add Print Modify

Fill-in information about Devices and Tests on this subtab:

- Enter the date on the top left corner of this subtab
- Print button will open up a [print menu](#)
- Modify button allows you to edit an existing record
- Previous button takes you to the previous record
- Next button takes you to the next record

Tester & Company subtab

The screenshot shows a web application window titled "Commercial Plumbing Location: - Building Name: TEST - PERMIT #: 0". The window has a menu bar with the following items: Find, Location/Owner, Plumbing Permit, Info, Inspections, Backflow, Downspout/Footer Drain, Comments, and GIS/GPS. Below the menu bar, there are three tabs: "Backflow Assembly/Installation Info", "Devices and Tests", and "Tester & Company". The "Tester & Company" tab is currently selected. The form contains the following fields:

Backflow Assembly/Installation Info			Devices and Tests		Tester & Company	
Date Test Received	Tester	Ohio Cert. Number				
<input type="text" value="//"/>	<input type="text"/>	<input type="text"/>				
Company	Company Phone					
<input type="text"/>	<input type="text" value="- - -"/>					
Notes						
<input type="text"/>						

Fill-in information about Tester & Company on this subtab

Commercial - Downspout/Footer Drain Tab

Commercial Plumbing Location: - Building Name: TEST - PERMIT #: 0

Find	Location/Owner	Plumbing Permit	Info	Inspections	Backflow	Downspout/Footer Drain	Comments	GIS/GPS
Date Issued	Downspout Permit #	Footer Drain Permit #	Sewer Permit #	Sewage Treatment Permit #				
<input type="text" value="//"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>				
Applicant			Owner's Name					
<input type="text"/>			<input type="text"/>					
Plumbing Contractor			Used for					
<input type="text"/>			<input type="text"/>					
Excavating Contractor	<input type="text"/>							
To connect with: <input type="checkbox"/> Storm Sewer <input type="checkbox"/> Road Ditch <input type="checkbox"/> Dry Well <input type="checkbox"/> Lake <input type="checkbox"/> Creek								
				Next Available Downspout Permit #		Print	Modify	

Fill in appropriate information for Downspout/Footer Drain:

- Next Available Downspout Permit # button enters the next sequential number
- Print button opens a window with printing options
- Modify button allows user to edit information

Commercial - Comments Tab

The screenshot shows a software window titled "Commercial Plumbing Location: - Building Name: TEST - PERMIT #: 0". It features a tabbed interface with the following tabs: Find, Location/Owner, Plumbing Permit, Info, Inspections, Backflow, Downspout/Footer Drain, Comments (selected), and GIS/GPS. The "Comments" tab is active, displaying a large text area with the placeholder text "Type your comments related to the record in here...". At the bottom right of the window, there are two buttons: "Spell Check" and "Modify".

Type your comments in this tab that you want a part of the entry:

- **Spell Check** button will check for spelling errors.
- **Modify** button allows you to edit existing comments.

Commercial - GIS/GPS Tab

Commercial Plumbing Location: - Building Name: TEST - PERMIT #: 0

Find Location/Owner Plumbing Permit Info Inspections Backflow Downspout/Footer Drain Comments GIS/GPS

Global Information System

Street #	Prefix Direction	Prefix Type	Street name	Street Suffix	Prefix Direction
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Global Positioning System

Latitude Decimal Value	Longitude Decimal Value
<input type="text"/>	<input type="text"/>

Modify

This tab allows you to enter your **GPS** coordinates for mapping purposes.

Field/Button	Description
Street #	(automatically filled out when you enter the address)
Prefix Direction	(automatically filled out when you enter the address)
Prefix Type	(automatically filled out when you enter the address)
Street Name	(automatically filled out when you enter the address)
Street Suffix	(automatically filled out when you enter the address)
Prefix Direction	(automatically filled out when you enter the address)
Latitude Decimal Value	Enter the latitude DECIMAL value of the location.
Longitude Decimal Value	Enter the longitude DECIMAL value of the location.
Modify	Click to modify the information on the page.

Residential – Find Tab

[illegible]

Under the **Find** tab there are options to search **Residential Plumbing** entries. Search options consist of: **by Street name, Parcel #, Sub lot #, Directions, ID#, Owner, Building, Permit #, and Final-In.**

Click which type of search you would like to perform and type the text in the textbox.

Hit **Enter** to perform the search.

To add new records click the **Add Address** button.

Click on the Address that is entered and click on the **Location/Owner Tab**.

To modify or delete an existing address, click on that address and click the **Modify/Delete** button

Residential - Location/Owner Tab

Residential Plumbing Location -111111 (1) ZIPPY LANE Z PERMIT #: 0

Find	Location/Owner	Plumbing Permit	Information	Inspections	Downspout/Footer Drain	Comments	GIS/GPS
------	----------------	-----------------	-------------	-------------	------------------------	----------	---------

Street: 111111 ZIPPY LANE Z
 City: CITY LAND
 State: OH
 Zip: 11111

Political Subdivision: 03 SMALLVILLE VILLAGE
 Name of Business(if applicable):
 Tap In Permit #:

Building New/Old (N/O):
 Used for:
 # of stories:

Water Supply (P)ivate), (C)ommunity) or (I)ndividual):
 Semi-Public Sewage(Y/N):

ID #: 111113
 Record #: 37840
 Owner's Name:

Street:
 City:

State:
 Zip:
 Phone:

Cell Phone:
 Work Phone:
 Fax:

Email:

Previous Next Link to Another Address Delete Add Modify

Click the **Modify** button to edit an existing record or click the **Add** button to add a new record:

- The **Street, City, State, and Zip** are greyed out and added from the **Find Tab**
- Enter the information relating to your record
- **Link to Another Address** button allows you to link a record to multiple addresses
- **Delete** button will remove a record

Residential - Plumbing Permit Tab

[illegible]

To enter a Plumbing Permit follow these steps:

- Enter the **Plumbing Permit #** followed by the **Date Issued**, **Date Expires** and **Date paid/Receipt #** if it was paid
- After filling out the Code/Description click Add Charge to add this record into the table below
- Fee codes may change over time but this table allows you to keep data entered historical
- Click Delete Charge button to remove a charge
- The **Next Available Permit#** button will automatically enter in the next **Plumbing Permit #**
- The **Drawing** button allows you to attach a file to the record

The Print button opens up a window with various printing options

Print

☒ Plumbing Permit
☐ Plumbing Permit (long form)
☐ Plumbing Invoice - Additional Fees
☐ Home Owner's Bond Release Letter
☐ Home Owner's Envelope
☐ Plumbing Contractor's Envelope
☐ Dymo Label - Home Owner
☐ Dymo Label - Plumbing Contractor
☐ Certificate of Use
☐ Plumbing Invoice

☐ 8 X 5 Index Card

☐ Postcard 4 X 6

☐ Letter A - Contractor
☐ Letter B - Contractor
☐ Letter C - Contractor
☐ Letter D - Owner
☐ Letter E - Owner
☐ Letter F - Owner
☐ Letter G - Owner
☐ Letter H - Owner
☐ Downspout/Footer Permit
☐ Inspection Report
☐ Comments
☐ Certificate of Plan Review

☒ Preview
☐ Print

OK
Close

Residential - Information Tab

Residential Plumbing Location: 111111 - (1) ZIPPY LANE - Z - PERMIT #: 0

Find	Location/Owner	Plumbing Permit	Information	Inspections	Downspout/Footer Drain	Comments	GIS/GPS
Plumbing Contractor / Installer <input type="text"/>				Plumbing Installer <input type="text"/>			
Installer's Registration # <input type="text" value="0"/>		Home Owner Bond ? <input type="checkbox"/>		Bond Amount <input type="text"/>			
Underground Inspection Date <input type="text" value="//"/>				Waste & Vents/Backflow Inspection Date <input type="text" value="//"/>			
Rough-in Approval Date <input type="text" value="//"/>				Final Inspection Date <input type="text" value="//"/> <input type="checkbox"/> Final Never Completed			
Inspector <input type="text"/>				Service <input type="text"/>			
Use Group / Certificate of Use <input type="text"/>				Occupant Load / Certificate of Use <input type="text"/>			
Total # of Fixtures Approved <input type="text"/>		Plan Review # <input type="text" value="0"/>		Plan Review Date Issued <input type="text" value="//"/>			
<div style="text-align: right;"> <input type="button" value="Next Plan Review #"/> <input type="button" value="Print"/> <input type="button" value="Modify"/> </div>							

Fill in appropriate information under the Information tab:

- **Next Plan Review #** button will automatically assign the next plan review number
- Make sure all dates are entered and correct
- Drop down boxes are populated in the Maintenance section

Residential – Inspections Tab

Residential Plumbing Location: 111111 - (1) ZIPPY LANE - Z - PERMIT #: 0

Find Location/Owner Plumbing Permit Information **Inspections** Downspout/Footer Drain Comments GIS/GPS

Inspection Date: 03/27/2018 Plumbing Permit #: 6 Inspector: CS CAT SCAN

Reason: SER - SEWER RESIDENTIAL Status: PASS

Plumbing Contractor: Memo

Next Previous Delete Add Print Modify

This tab is where you will enter in your Residential inspections:

- Enter the **Residential Inspection Date**, **Plumbing Permit #**, and choose which Inspector performed the inspection.
- **Modify** button to change a record, **Add** button to add a new inspection, **Delete** button to remove a record, **Next** and **Previous** buttons will navigate between inspections, and **Print** button opens a window with printing options

Residential - Downspout/Footer Drain Tab

Residential Plumbing Location: 111111 - (1) ZIPPY LANE - Z - PERMIT #: 0

Find	Location/Owner	Plumbing Permit	Information	Inspections	Downspout/Footer Drain	Comments	GIS/GPS
<div> <div>Date Issued</div> <div>Downspout Permit #</div> <div>Footer Drain Permit #</div> <div>Sewer Permit #</div> <div>Sewage Treatment Permit #</div> </div> <div> <div>Applicant</div> <div>Owner's Name</div> </div> <div> <div>Plumbing Contractor</div> <div>Used for</div> </div> <div> <div>Excavating Contractor</div> </div> <div> <div>To connect with:</div> <div> <input type="checkbox"/> Storm Sewer <input type="checkbox"/> Road Ditch <input type="checkbox"/> Dry Well <input type="checkbox"/> Lake <input type="checkbox"/> Creek </div> </div> <div> <div>Next Available Downspout Permit #</div> <div>Print</div> <div>Modify</div> </div>							

To enter information about the Downspout/Footer Drain:

- Start by entering the Date Issued
- Enter Downspout Permit # or click the Next Available Downspout Permit # button
- Enter in the information displayed on the page
- Print button opens a window with printing options and Modify allows you to change a record

Residential – Comments Tab

The screenshot shows a software window titled "Residential Plumbing Location: 111111 - (1) ZIPPY LANE - Z - PERMIT #: 0". The window has a tabbed interface with the following tabs: Find, Location/Owner, Plumbing Permit, Information, Inspections, Downspout/Footer Drain, Comments (which is the active tab), and GIS/GPS. The "Comments" tab contains a large text area with the placeholder text "This is the section where you will type your comments...". At the bottom right of the window, there are two buttons: "Spell Check" and "Modify".

This section is where you will put your comments related to the record you are entering:

- Type comments in windowed section
- **Spell Check** button checks for spelling errors
- **Modify** allows you to make changes to already existing comments

Residential - GIS/GPS Tab

Residential Plumbing Location: 111111 - (1) ZIPPY LANE - Z - PERMIT #: 0

Find	Location/Owner	Plumbing Permit	Information	Inspections	Downspout/Footer Drain	Comments	GIS/GPS								
<div style="text-align: center;">Global Information System</div> <table border="0"> <tr> <td>Street # 111111</td> <td>Prefix Direction <input type="checkbox"/></td> <td>Prefix Type <input type="checkbox"/></td> <td>Street name ZIPPY LANE</td> <td>Street Suffix Z</td> <td>Prefix Direction <input type="checkbox"/></td> </tr> </table> <div style="text-align: center;">Global Positioning System</div> <table border="0"> <tr> <td>Latitude Decimal Value <input type="text"/></td> <td>Longitude Decimal Value <input type="text"/></td> </tr> </table> <div style="text-align: right; margin-top: 20px;"><input type="button" value="Modify"/></div>								Street # 111111	Prefix Direction <input type="checkbox"/>	Prefix Type <input type="checkbox"/>	Street name ZIPPY LANE	Street Suffix Z	Prefix Direction <input type="checkbox"/>	Latitude Decimal Value <input type="text"/>	Longitude Decimal Value <input type="text"/>
Street # 111111	Prefix Direction <input type="checkbox"/>	Prefix Type <input type="checkbox"/>	Street name ZIPPY LANE	Street Suffix Z	Prefix Direction <input type="checkbox"/>										
Latitude Decimal Value <input type="text"/>	Longitude Decimal Value <input type="text"/>														

This tab allows you to enter your **GPS** coordinates for mapping purposes.

Field/Button	Description
Street #	(automatically filled out when you enter the address)
Prefix Direction	(automatically filled out when you enter the address)
Prefix Type	(automatically filled out when you enter the address)
Street Name	(automatically filled out when you enter the address)
Street Suffix	(automatically filled out when you enter the address)
Prefix Direction	(automatically filled out when you enter the address)
Latitude Decimal Value	Enter the latitude DECIMAL value of the location.
Longitude Decimal Value	Enter the longitude DECIMAL value of the location.
Modify	Click to modify the information on the page.

Appliance Installers – Find Tab

Appliance Installers -

Find Information Licensing Information

Enter Business Name/Plumber or Registration #

 Add Close

Registration #	Name	Street	City

This section is a little bit easier than Commercial and Residential

- Enter the **Business Name/Plumber or Registration #** to find a record
- Click the **Add** button to add a new record
- **Close** button will exit from this window

Appliance Installers – Information Tab

Start by entering the Registration #

- Add button allows you to add a new record
- Modify button allows you make to changes to a previous record
- Delete button will remove current record
- Print button opens a window with printing options
- Previous/Next buttons allow you to go through different records

Appliance Installers – Licensing Information Tab

Appliance Installers -

Find Information **Licensing Information**

Code Descript Local fee Date issued

Date paid Receipt# Political subdivision

State License #

☐ Backflow Technician ☐ Limited ☐ Unlimited

Email

Note

☐ Out of business OOB date

Print Modify

This tab is where you will enter the Licensing information for Appliance installers

- Enter the code for the fee and Date paid/Receipt number if they paid it.
- Fill out all necessary information
- Print button opens window with printing options and Modify button allows you to change an existing record

[illegible]

Add button will allow you to add a new record and **Close** button will close this window

Contractors/Installers - Information Tab

Plumbing Contractors / Installers - V, TEST.

Find Information Licensing Information Installers

Application for Registration to Install Plumbing

Registration # Business Name/Plumbing Installer

Street City State

Zip code Phone Cell Phone Fax/Pager Years

Bonded/Ins(Y/N)? ☐ Bond/Ins. Company Bond/Ins. Exp. Certification of Ins. Expiration

Name of Contractor/Plumbing Installer Street address

City State Zip code Phone

Enter information about the Business/Plumbing Installer:

- **Print** button will open window with printing options
- **Previous & Next** buttons will let you go through different records
- **Delete** button will remove a record
- **Add** will add a new empty record and **Modify** will update an old record

Contractors/Installers – Licensing Information Tab

Plumbing Contractors / Installers - V, TEST.

Find	Information	Licensing Information	Installers
Code 01	Descript PLUMBING REGISTRATION 2016	Local fee 200.00	Date issued / /
Date paid 06/09/2009	Receipt# 116201	Political subdivision 02 BUBONICA TWP	
State License # 	Expiration Date / /	<input type="checkbox"/> Backflow Technician <input type="checkbox"/> Limited <input type="checkbox"/> Unlimited	
Website 			
Email 			
Note 			
<input type="checkbox"/> Out of business OOB date 01/01/2010			
		Print	Modify

Enter **Code** for fee along with **Date paid** and **Receipt #** if applicable:

- **Print** button will open window with printing options
- **Modify** will update an old record

Contractors/Installers – Installers Tab

[illegible]

Follow the following steps:

- Click Add Installer button to add a new installer, the ID# will automatically generate
- Type in the Installer, Date issued, Local Fee, and check mark if it was paid
- Delete Installer button removes a record
- Print button opens a window with printing options
- Modify button allows changes to be made

Sewer & Water Line Installers – Find Tab

[illegible]

This section is a little bit easier than Commercial and Residential

- Enter the **Business Name/Plumber or Registration #** to find a record
- Click the **Add** button to add a new record
- **Close** button will exit from this window

Sewer & Water Line Installers – Information Tab

Sewer and Water Installers -

Find Information Licensing Information

Application for Registration to Install Plumbing

Registration # Business Name

Street City State

Zip code Phone Cell Phone Fax/Pager Years

Bonded(Y/N?) ☐ Bond Company Bond Expires Certification of Ins. Expiration

Name of Appliance Installer Street address

City State Zip code Phone

Enter information about the Business/Plumbing Installer:

- **Print** button will open window with printing options
- **Previous & Next** buttons will let you go through different records
- **Delete** button will remove a record
- **Add** will add a new empty record and **Modify** will update an old record

Sewer & Water Line Installers – Licensing Information Tab

Sewer and Water Installers - TEST BUSINESS NAME

Find Information Licensing Information

Code	Descript	Local fee	Date issued
TEST	THIS IS A TEST	90.00	//

Date paid	Receipt#	Political subdivision
03/28/2018		01 PLAGUEVILLE TWP

State License #

☐ Backflow Technician ☐ Limited ☐ Unlimited

Email

Note

☐ Out of business OOB date //

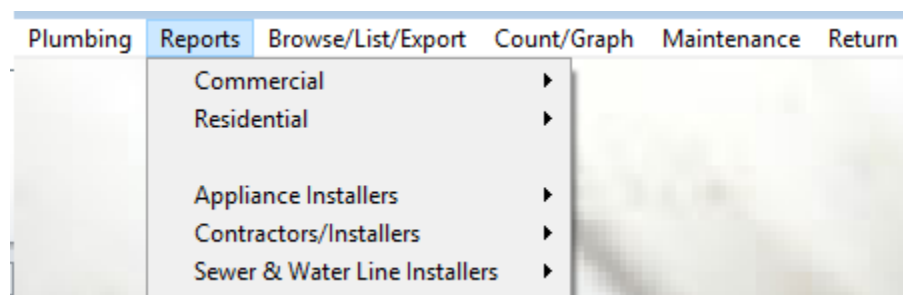
Print Modify

Enter **Code** for fee along with **Date paid** and **Receipt #** if applicable:

- **Print** button will open window with printing options
- **Modify** will update an old record

Chapter 3: Reports

Navigate to: **Environmental Health > Plumbing > Reports**. There will be a drop down menu for different types of reports you can create/modify.



Reports can be filtered. [See Page on Filters for more detail \(Click this link\).](#)

Report	Description
Commercial	
Backflow Devices & Test	Generates a report based on backflow devices and test
Backflow Devices & Test – Three Part Form	Generates a report based on backflow devices & test in a three part form
Backflow Devices & Test – EPA List	Generates a report based on backflow devices & test with an EPA list
Backflow Devices – Count Per Address	Generates a report based on backflow devices with a count per address
Backflow Devices By Waste & Vents/Backflow Inspection Date	Generates a report based on backflow devices by waste & vents with a backflow inspection date
Backflow Master List	Generates the backflow master list
Envelopes – Owner	Generates envelopes for the Owner
Final Releases	Generates a final releases form
Inspections	Generates a report based on Inspections with given date range
Inspection Schedule	Generates an inspection schedule
Labels – Owner	Generates labels based on the owner
Letters	Generates letters for Commercial Plumbing

List of Plumbing Permits Issued	Generates a list of the plumbing permits that have been issued
List of Plumbing Permits by Permit #	Generates a list of plumbing permits based on Permit number
Monthly Plumbing Report	Generates a monthly plumbing report
Permit Invoices	Generates a permit invoices report
Plumbing Charges	Generates a report based on plumbing charges
Plumbing Charges – Past Due	Generates a report based on plumbing charges that are past due
Plumbing Permits	Generates plumbing permits based on given date range
Plumbing Permit Contractor’s Envelope	Generates an envelope for the Plumbing Permit for the Contractor
Rough – In Releases	Generates a report based on Rough – In releases
Residential	
Contract City Billing	Generates a report based on contract city billing
Envelopes – Owner	Generates envelopes addressed to the owner
Final Releases	Generates a report based on final releases
Inspections	Generates a report based on inspections within given date range
Inspection Schedule	Generates an inspection schedule
Labels – Owner	Generates labels with the Owner
List of Parcel Numbers/Sewage/Well/Plumbing records	Generates a list of parcel numbers, sewage, well, and plumbing records
List of Plumbing Permits Issued	Generates a list of the plumbing permits that were issued based on the date range given
List of Plumbing Permits by Permit #	Generates a list of plumbing permits by Permit # within given date range
Monthly Plumbing Report	Generates a monthly plumbing report based on given date range
Plumbing Charges	Generates a plumbing charges report based on given date range
Plumbing Charges – Past Due	Generates a plumbing charges report that are past due based on given date range
Plumbing Permits	Generates plumbing permits based on given date range
Plumbing Permit Contractor’s Envelopes	Generates Plumbing Permit Contractors Envelopes based on given date range

Rough – In Releases	Generates a report based on Rough – In Releases
Appliance Installers	
Applications	Generates applications based on given date range
Envelopes	Generates envelopes based on given date range
Labels	Generates labels based on given date range
List by Company Name	Generates a list by Company Name based on given date range
List by Company Name with Cell Phone #'s	Generates a list by Company Name with Cell Phone numbers based on given date range
List by Appliance Installers Name	Generates a list by Appliance Installers name based on given date range
Registration Cards	Generates registration cards based on given date range
Contractors/Installers	
Applications	Generates applications based on date range
Envelopes	Generates envelopes based on date range
Letters	Generates letters based on date range
Labels – Installers	Generates labels for installers based on date range
List by Company Name	Generates a list by company name based on date range
List by Company Name – Expired	Generates a list by company name that are expired based on date range
List by Company Name with Cell Phone #s	Generates a list by company name with cell phone numbers based on date range
List by Installers Name	Generates a list by installers name based on given date range
Plumbers Registration Cards – Apprentice	Generates plumbers registration cards with apprentice based on given date range
Plumbers Registration Cards – Journeyman	Generates plumbers registration cards with journeymen based on given date range
Plumbers Registration Cards – Master	Generates plumbers registration cards with master based on given date range
Plumbers Registration Cards – Associate	Generates plumbers registration cards with associate based on given date range

Plumbers Registration Cards – Backflow Installer/Tester	Generates plumbers registration cards with backflow installer/tester based on given date range
Plumbers Registration Cards – Maintenance	Generates plumbers registration cards with Maintenance based on given date range
Plumbers Registration Cards – Med Gas	Generates plumbers registration cards with med gas based on given date range
Plumbers Registration Cards – Sewer Trapper	Generates plumbers registration cards with sewer trapper based on given date range
Plumbers Registration Cards – Water Conditioning Installer	Generates plumbers registration cards with water conditioning installer based on given date range
Plumbers Registration Cards – Water Heater Installer	Generates plumbers registration cards with water heater installer based on given date range
Sewer & Water Line Installers	
Applications	Generates applications based on date range
Envelopes	Generates envelopes based on date range
Labels	Generates labels based on date range
List by Company Name	Generates a list by company name based on date range
List by Company Name with Cell Phone #s	Generates a list by company name with cell phone numbers based on date range
List by Sewer & Water Line Installers Name	Generates a list by sewer & water line installers name based on date range
Registration Cards	Generates registration cards based on date range

Each Report will have a date range you can enter before the report is generated:

Residential Plumbing Report Options for Inspections

Output to: ☒ Preview ☐ Printer

From Inspection Date: //

☐ Include Filter Printout ☐ Include Mail Merge File

To Inspection Date: //

OK Close Filters

Chapter 4: Browse/List/Export

Inside the **Plumbing** module navigate to the **Browse/List/Export**.

This section allows the exportation of data, also allowing the user to use [Filters](#).

There are also multiple ways for you to output the data: Screen, Printer, DBF file, SDF file, and Delimited file.

If you pick DBF file, SDF file, or Delimited file make sure you select the appropriate path.

Select **Browse** to find the needed path.

Commercial Plumbing - Browse/List/Export

Output to:

☒ Screen

☐ Printer

☐ DBF file

☐ SDF file

☐ Delimited file

C:\HDIS\EXPORT\COMMERCIAL PLUMBING\

Output data:

☒ All Fields

☐ Selected fields only

Sort by: (3 Max)

< >

- # of Stories
- Applicant
- Backflow count
- Building Attention
- Building Owner First name
- Building Owner Last name
- Building Owner Name
- Building Owner Street
- Building owner city
- Building owner fax
- Building owner state
- Building owner zip
- Building owner's extension
- Building owner's phone
- Building(New/Old)
- Bus Owner's Attention
- Bus Owner's City

Sort by

Sorting by Field Names (3 Max) is an option.

Click on the Field Name you want to sort by and press the < symbol to move the Field Name to the empty box.

If you want to remove a Field Name, click the Field Name and press the > symbol.

The screenshot shows a software interface titled "Sort by: (3 Max)". It consists of two main parts: a large empty rectangular box on the left for selected fields, and a list of available field names on the right. Between these two boxes are two buttons: one with a left-pointing chevron (<) and one with a right-pointing chevron (>). The list of field names on the right includes: # of Stories, Applicant, Backflow count, Building Attention, Building Owner First name, Building Owner Last name, Building Owner Name, Building Owner Street, Building owner city, Building owner fax, Building owner state, Building owner zip, Building owner's extension, Building owner's phone, Building(New/Old), Bus Owner's Attention, Bus Owner's City, and Bus Owner's Extension. Each list has a small upward arrow at the top and a downward arrow at the bottom for scrolling.

Filters

From the **Browse/List/Export** click on the **Filters** button

This section allows you to set filters based on the **Output Field**

Output Field	Data	Data
<input type="checkbox"/> # OF STORIES	=	
<input type="checkbox"/> APPLICANT	=	
<input type="checkbox"/> BACKFLOW COUNT	=	
<input type="checkbox"/> BUILDING ATTENTION	=	
<input type="checkbox"/> BUILDING OWNER FIRST NAME	=	
<input type="checkbox"/> BUILDING OWNER LAST NAME	=	
<input type="checkbox"/> BUILDING OWNER NAME	=	
<input type="checkbox"/> BUILDING OWNER STREET	=	
<input type="checkbox"/> BUILDING OWNER CITY	=	
<input type="checkbox"/> BUILDING OWNER FAX	=	
<input type="checkbox"/> BUILDING OWNER STATE	=	
<input type="checkbox"/> BUILDING OWNER ZIP	=	
<input type="checkbox"/> BUILDING OWNER'S EXTENSION	=	
<input type="checkbox"/> BUILDING OWNER'S PHONE	=	
<input type="checkbox"/> BUILDING(NEW/OLD)	=	
<input type="checkbox"/> BUS OWNER'S ATTENTION	=	
<input type="checkbox"/> BUS OWNER'S CITY	=	
<input type="checkbox"/> BUS OWNER'S EXTENSION	=	
<input type="checkbox"/> BUS OWNER'S FAX	=	
<input type="checkbox"/> BUS OWNER'S FIRST NAME	=	
<input type="checkbox"/> BUS OWNER'S LAST NAME	=	
<input type="checkbox"/> BUS OWNER'S NAME	=	
<input type="checkbox"/> BUS OWNER'S PHONE	=	
<input type="checkbox"/> BUS OWNER'S STATE	=	
<input type="checkbox"/> BUS OWNER'S STREET	=	

Clear Filter Open Filter Save Filter Close

**** Note **** If you are attempting to create a filter to search for **only** blank data use: "(Blank)."

"(Blank)" is appropriate when you are searching for an unspecified name, date, or Boolean (True/False – Yes/No).

**** Note **** If you want to search for a string with some spacing after the characters use: "AB(B)".

Example for characters with a space:

Desired Search Result: "Monkey Inc"

Appropriate Search: "Monkey(B)"

Chapter 5: Count Graph

Inside the **Plumbing** module navigate to the **Count/Graph**.

Create the title you would like as the **Report Title**.

This section allows you to create a Count, Pie graph, or bar graph of the data. There is a **Report Title**, **Legend Title**, **List of Field Names**, **Footer**, and **Output to** section. The **Output to** gives you options on how you want to display or store your results.

Under the **Output**: there is an option to show the **top ten** or **all** results.

There is a **Filters** button which is identical to the [Filters](#) in the [Browse/List/Export](#) section. The purpose of the filters section is so you can manipulate the type of results. For example: Let's say you wanted to see results from a certain date range. If you go into filters you can create a date range and the results will only display those records.

There is a **Sort by** section where you can organize your results from *High to low (Greatest value to lowest value)*, *Low to high (Lowest value to greatest value)*, and by *data* (results will be displayed organized based on the data. Example: If it is based on ID numbers, the numbers will be organized in order).

In the **Type** area, if you select Totals: **Level 1 Group** and **Level 2 Group** options will display. Select the best options dependent on your search type.

Count

Here is an example of what the “**Count**” type would look like.

There are percentages and totals on the side and bottom of the page.

Report Designer - count.fx - Page 1

1st contact date - Count/Percentage		
Number	Percent	Location city
2419	89 %	/ /
6	0 %	02/23/2016
5	0 %	03/17/2016
5	0 %	04/26/2016
5	0 %	06/03/2016
5	0 %	09/01/2016
4	0 %	04/25/2016
4	0 %	09/09/2016
4	0 %	12/28/2015
266	10 %	OTHER
2723	100 %	Totals

If you choose to add filters, those will also be shown at the bottom of the page.

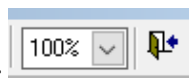
Report Designer - count.frx - Page 1

Contact's City - Count/Percentage		
Number	Percent	Contact's City
1	50 %	BEAVERCREEK
1	50 %	BELLBROOK
2	100 %	Totals

Filters

Contact's City=B

Click on the door icon next to the percent to return to the menu:



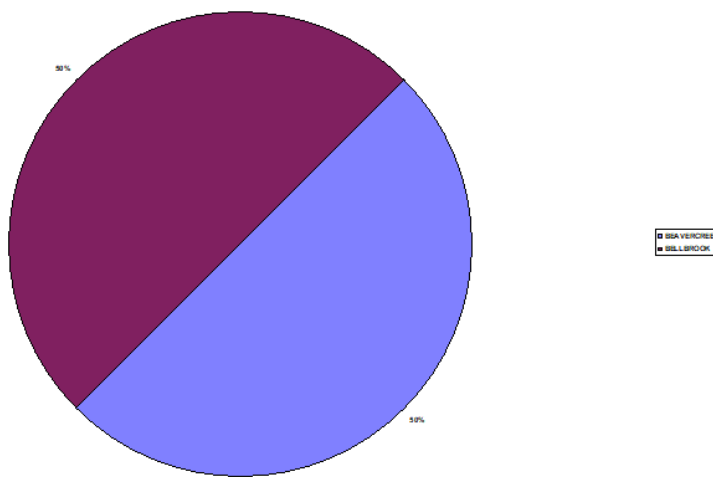
Pie Graph

Here is an example of what the “**Pie Graph**” type would look like.

Depending on the data chosen, the percentages are altered to reflect it.

There is a legend displaying the data chosen and the color representation.

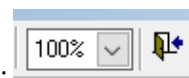
Contact's City



Filters
Contact's City=B

BGI HD 11/30/2017

Click on the door icon next to the percent to return to the menu:

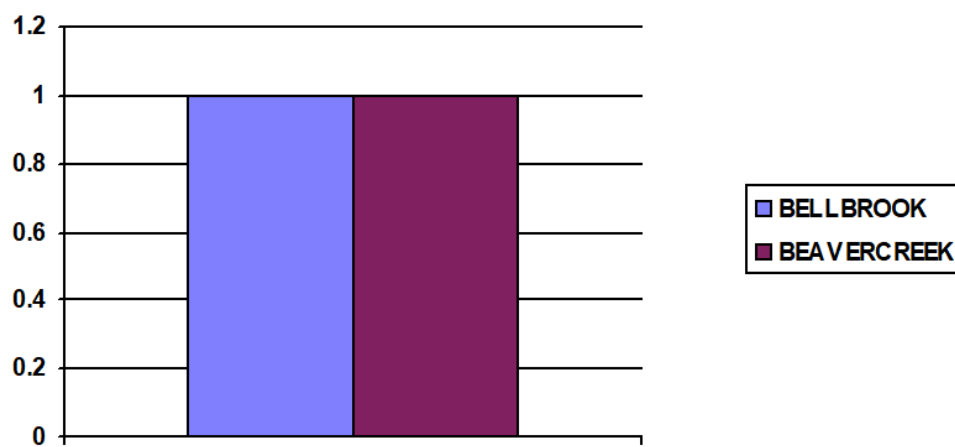


Bar Graph

Here is an example of what the “**Bar Graph**” type would look like.

Depending on the data chosen, there will be a specific color to represent the data’s bar.

Contact's City



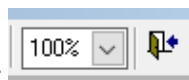
Filters

Contact's City=B

BGI HD

11/30/2017

Click on the door icon next to the percent to return to the menu:

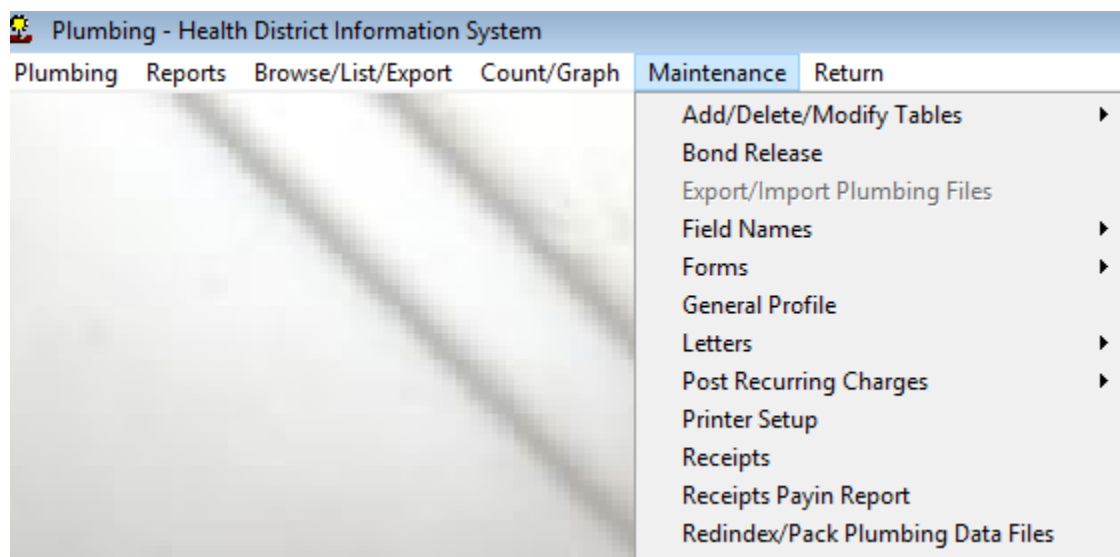


Chapter 6: Maintenance

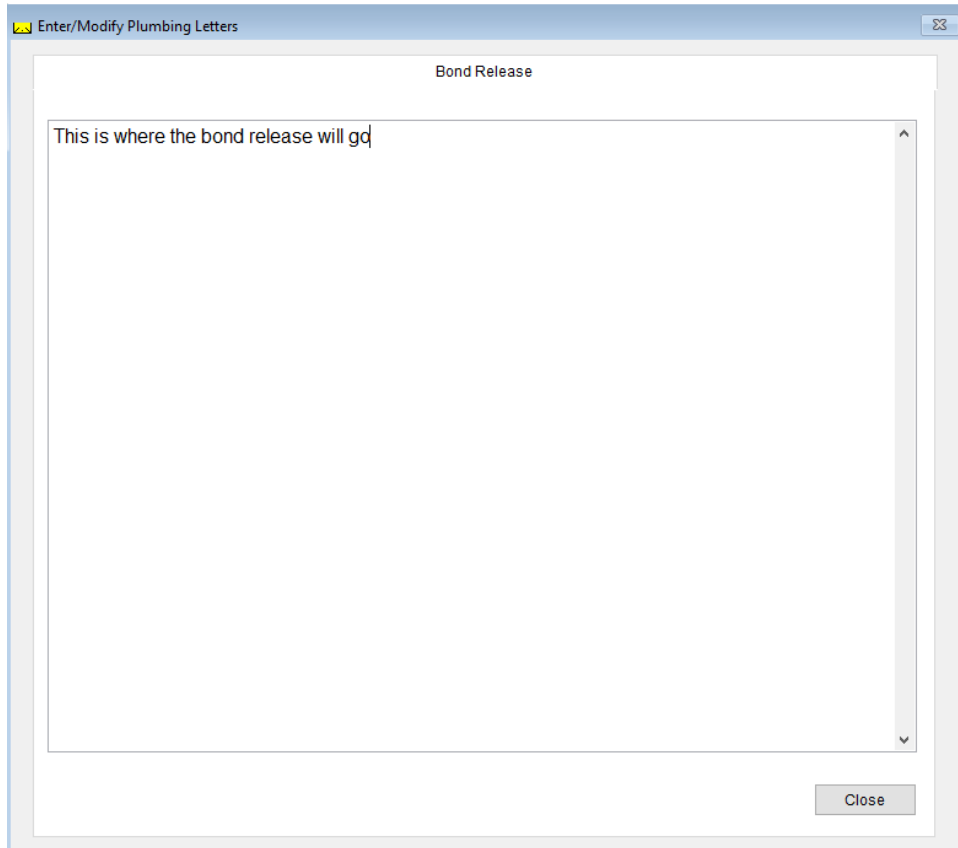
Navigate to: **Environmental Health > Plumbing > Maintenance**

The **Maintenance** section holds a lot of the mechanics behind the module.

This area is where you can [Add/Delete/Modify](#) tables along with other actions you use in the **Plumbing data entry windows**.



Bond Release



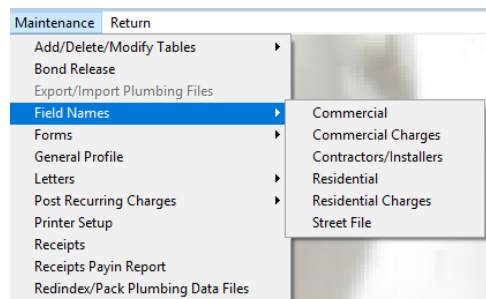
The screenshot shows a software window titled "Enter/Modify Plumbing Letters" with a sub-header "Bond Release". Inside the window is a large text area containing the text "This is where the bond release will go". A vertical scrollbar is on the right side of the text area. At the bottom right of the window is a "Close" button.

Type in the **Bond Release** information in the text box shown above

Close button will exit from this window

Field Names

Navigate to: **Maintenance > Field Names**

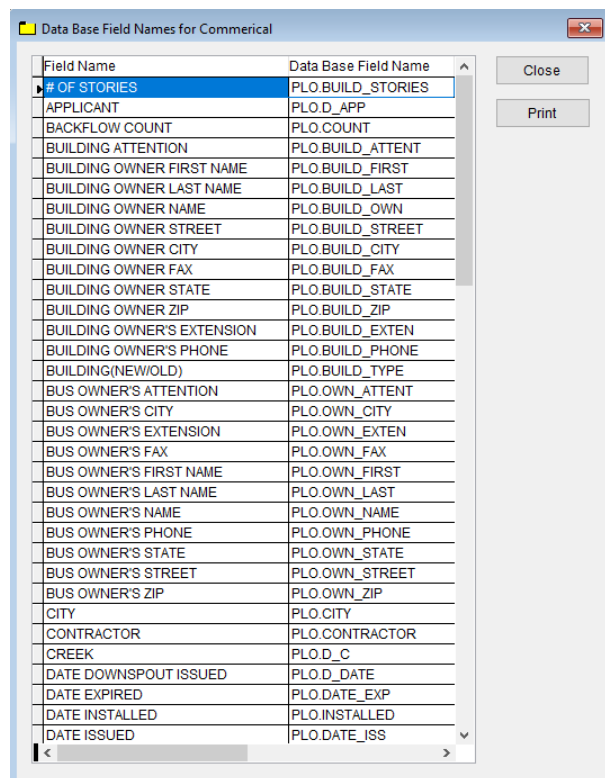


The field names listing can be very useful in determining what fields you wish to utilize to merge data for letters or when creating ad hoc reports. The field name column is used to merge data into letters.

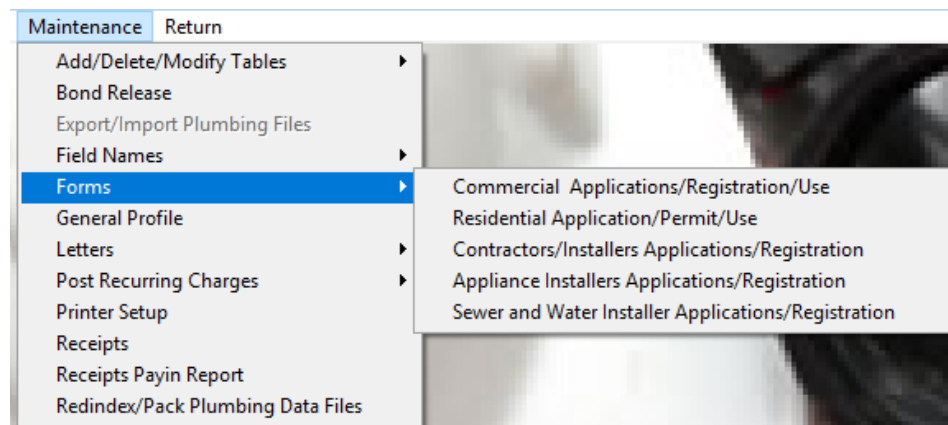
Enter the field name in capital letters in the body of the letter surrounded by asterisks (no spaces between asterisks and field name).

Example: *FIELDNAME*

[See Notification Letters for more information on Letters.](#)

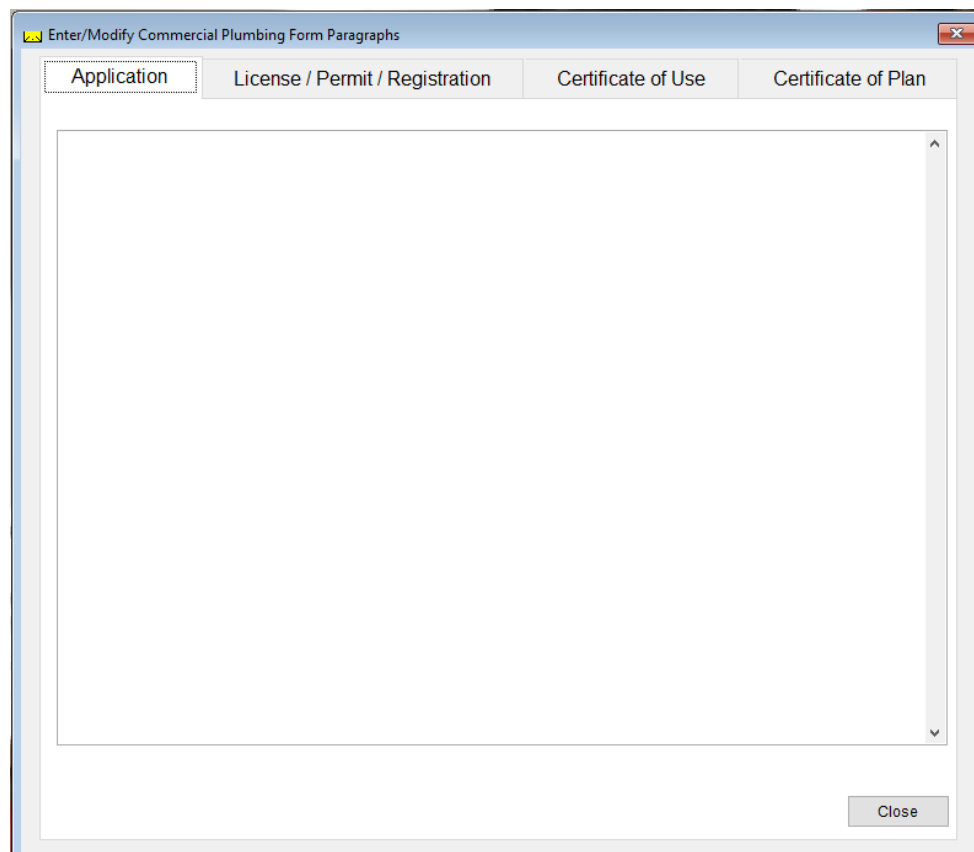


Forms



Each of these screens will allow you to enter in the forms you want to use in the module.

Enter in the form and you will be able to use it for the specified records.



General Profile

Navigate to: **Maintenance > General Profile**

The **General Profile** allows you to fill out the basic information regarding **Plumbing**.

Check marking a year next to **View Archives** will give you access to previous data from the selected years.

On the **General** Tab there are options to edit the margins in letters and letter heads.

General Profile

Demographics | General | Management | Environmental | Community & Public Health Services | Vital

* Health Department: BGI HD

City: Middleburg Heights

Division:

* State: OH

* Address1: 7550 Lucerne Drive

* Zip: 44130

Address2:

* County: Kayle

* Phone #s: 1-440-891-9100

* FAX #: 1-440-891-9458

Federal Tax ID: ADFA

Commissioner: Doc Darrell

Client/Server Location: M:\HDIS\DATA

Email: ADFASD

Make Checks Payable to: ADSF

View Archives: ☐ 2017 ☐ 2016 ☐ 2015 ☐ 2014 ☐ 2013 ☐ 2012 ☐ 2011 ☐ 2010 ☐ 2009 ☐ 2008
☐ 2007 ☐ 2006 ☐ 2005 ☐ 2004 ☐ 2003 ☐ 2002 ☐ 2001 ☐ 2000 ☐ 1999 ☐ 1998

* - Required Fields

Cancel Close

Letters

Navigate to: **Maintenance > Letters**

If you click on **Letters** under the **Maintenance** tab, a window will pop up. Here you can create letters relating to a specific area under **Plumbing**. [After reading this page, click this link to see more information on field names.](#)

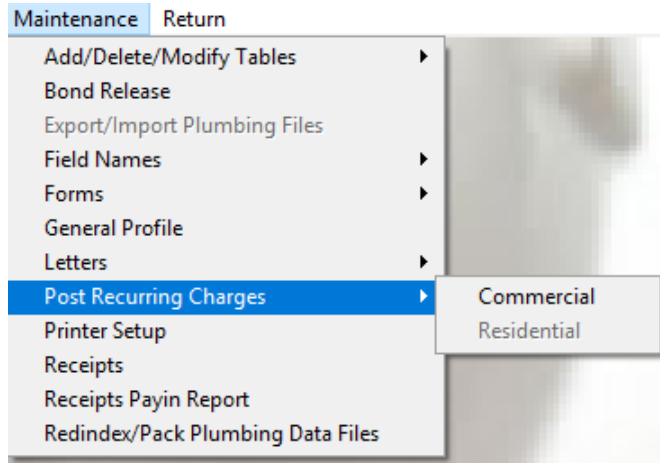
The HDIS system provides you the flexibility to write standard letters that can be sent to clients. These letters will pull data through use of the *. The * is placed on each end of the field name that you want to pull into the letter.

Merge fields:

All upper case:	*OWNER*	JOHN DOE
Only first letter uppercase	*Owner*	John Doe
All lower case	*type of animal*	dog

Examples: *OWNER* = JOHN DOE
 Owner = John Doe
 type of animal = dog

Post Recurring Charges



Post Recurring Charges - Commercial Plumbing

Specify Charge Type(s) and Time Period for Charges being Posted

Charge Month: Charge Date:

Recurring Charge:

Frequency of Charge: ☐ Annual / Multi-year ☐ Quarterly ☐ Monthly ☐ Other

Select:

- Charge Month
- Charge Date
- Recurring Charge
- Frequency of Change

Generate Charges button will automatically generate the charges based on the fields you selected.

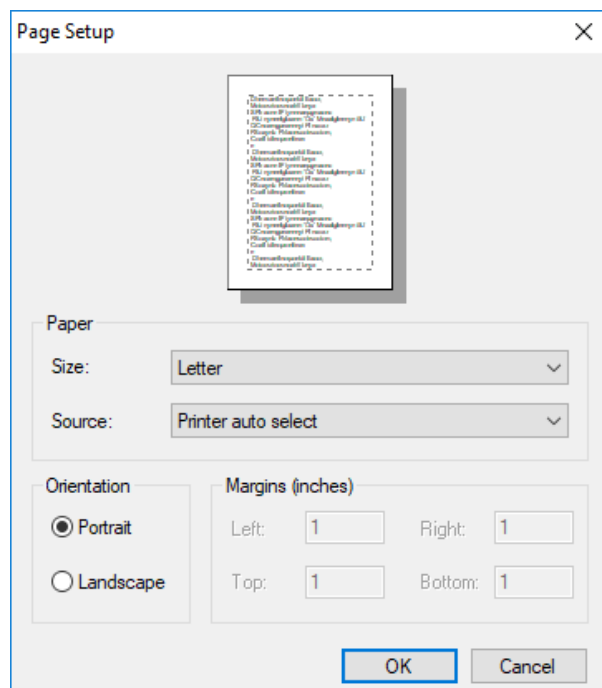
Exit button will close out of this screen.

Printer Setup

Navigate to: **Maintenance > Printer Setup**

The print setup allows you to choose from what printer you would like to print.

Select the printer in the name dropdown and click **OK**.



Page Setup

Preview:

Paper

Size: Letter

Source: Printer auto select

Orientation

☒ Portrait

☐ Landscape

Margins (inches)

Left: 1 Right: 1

Top: 1 Bottom: 1

OK Cancel

Receipts Pay – In Report

If you have the **Receipts** module, you have the ability to print your pay in reports through the **Maintenance** tab.

Select **From** and **To** date, **Receipt Book/Pay in by Fund/Pay in by Initials/Receipt**, and either **Preview** or **Print**.

The screenshot shows a Windows-style dialog box titled "Print Pay In or Receipt". It contains the following elements:

- From Date:** A text box containing "03/29/2018".
- To Date:** A text box containing "03/29/2018".
- Buttons:** "OK" and "Close" buttons are located on the right side.
- Radio Buttons:**
 - ☒ Pay In by Receipt Book: Below this is a dropdown menu.
 - ☐ Pay in by Fund
 - ☐ Pay in by Initials
 - ☐ Receipt
- Output to:**
 - ☒ Preview
 - ☐ Print

Reindex/Pack Plumbing Control Data Files

Navigate to: **Maintenance > Reindex/Pack Plumbing Data Files**

This function is only needed should your data be corrupt due to a power failure.

Please contact BGI if you have any questions or concerns.

