



# Private Water Systems User Manual



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# **Chapter 1: Getting Started**

Once the Private Water Systems module has been installed, it can be accessed by going to:

#### **Environmental Health > Private Water Systems**

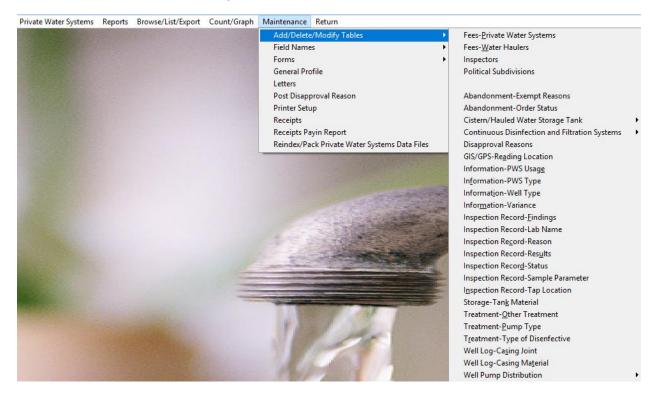
Management Services	Environmental Health	Community and Public Health Sen	
	Beaches		
	Body Art		
	<u>Daily Work Sheets</u>		
	Environmental Assessment		
	Food Protection		
	M <u>o</u> squito Control		
	Open Burning		
	Parks/ <u>C</u> amps		
	Payin Reports		
	Pl <u>u</u> mbing		
	Pool/Spa/Special Use Pool		
	Pr <u>i</u> vate Water Systems		
	<u>P</u> ublic Health Nuisances		
	Rabies Control		
	Receipts		
	School Inspections		
	Sewage Treatment		
	Solid <u>W</u> aste		
	60 AL . MAI	er Boller III. III.	
	City of Lorain - Multi-Dwelling Inspections		
	City of Portsmouth - Rental Dwelling Inspections		
	Franklin County - Environmental History		
	Wood County - Housing Inspections		
	Discontinued Modules		





Once inside **Private Water Systems**, navigate to:

#### Maintenance > Add/Delete/Modify Tables



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

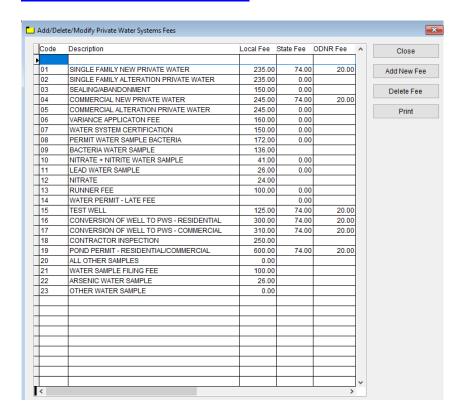
When entering data into **Private Water Systems**, there will sometimes be drop-down boxes for quick data entry.

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 - Private Water Systems



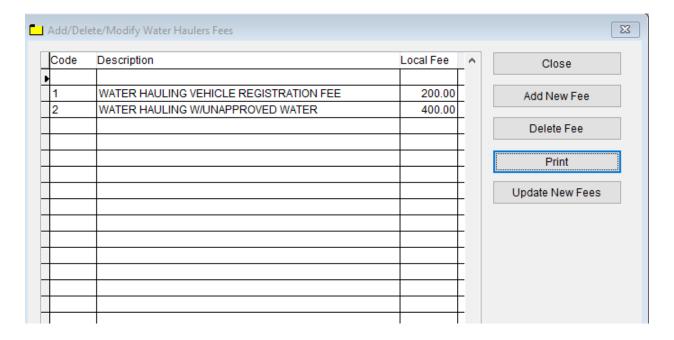
To enter **Fees – Private Water Systems**, follow these steps (use the tab key to advance to each field):

- Click on the **Add New Fee** button and begin filling in the appropriate requirements
- Enter the Code, Description, Local fee, State Fee, and ODNR Fee

- **Print** button will open printing option's window.
- Edit Button allows you to edit a fee
- **Delete button** allows you to delete a fee that is selected
- Click **Close** to exit the table.



#### **Fees – Water Haulers**



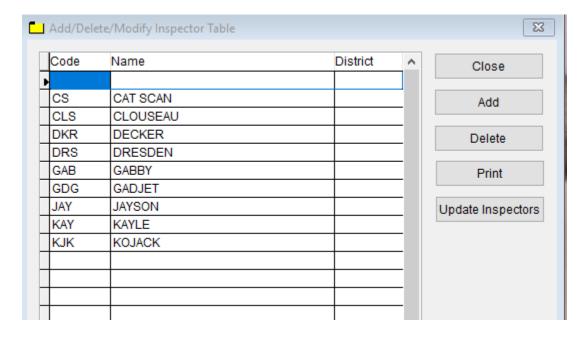
To enter **Fees – Water Haulers,** follow these steps (use the tab key to advance to each field):

- 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
- Update New Fees button will update a newly added fee in the system

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



#### **Inspectors**



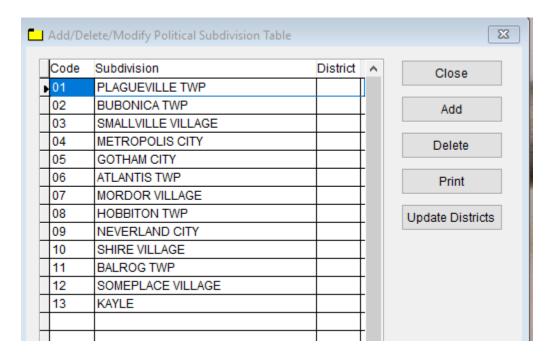
To enter **Inspectors**, follow these steps (use the tab key to advance to each field):

- Click Add and enter a Code, Name, and District
- Update Inspectors button allows you to update the newest Inspectors entered
- Click on the Inspector you want to Delete and click the **Delete** button

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



#### **Political Subdivision**



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

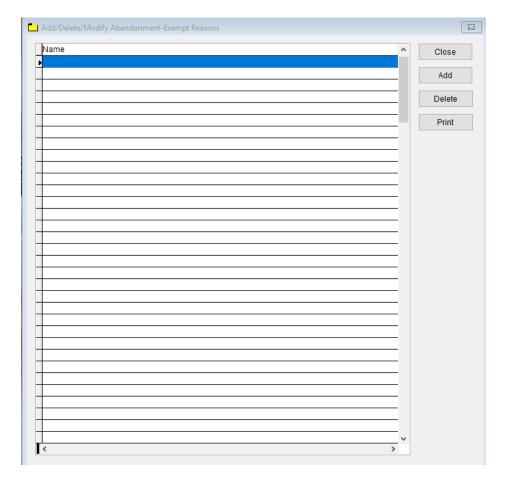
- Click Add and enter a Code, Subdivision, and District
- Update Districts button allows you to update the newest Inspectors entered
- Click on the Subdivision you want to Delete and click the **Delete** button

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





#### **Abandonment – Exempt Reasons**



To enter **Abandonment – Exempt Reason s,** follow these steps (use the tab key to advance to each field):

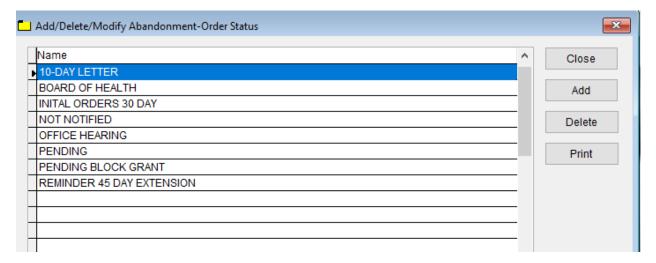
- Click Add and enter a Name to identify the Abandonment Exempt Reasons.
- Click on Abandonment Exempt Reasons, Click Delete to delete the entry.

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





#### **Abandonment – Order Status**



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

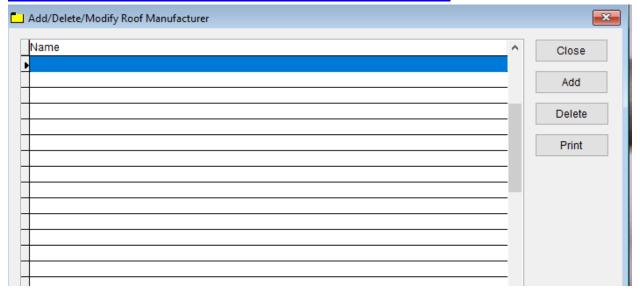
- Click Add and enter a Name to identify the Abandonment Order Status.
- Click on **Abandonment Order Status**, Click **Delete** to delete the entry.

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





## **Cistern/Hauled Water Storage Tank – Roof Manufacturer**



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

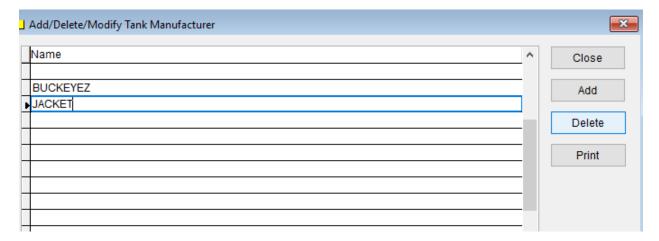
- Click **Add** and enter a **Name** to identify the **Roof Manufacturer**.
- Click on Name, Click Delete to delete the entry.

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





## **Cistern/Hauled Water Storage Tank – Tank Manufacturer**



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

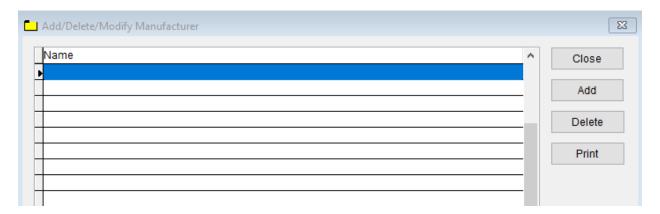
- Click Add and enter a Name to identify the Tank Manufacturer.
- Click on Name, Click Delete to delete the entry.

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





## **Continuance Disinfection and Filtration Systems – Manufacturer**



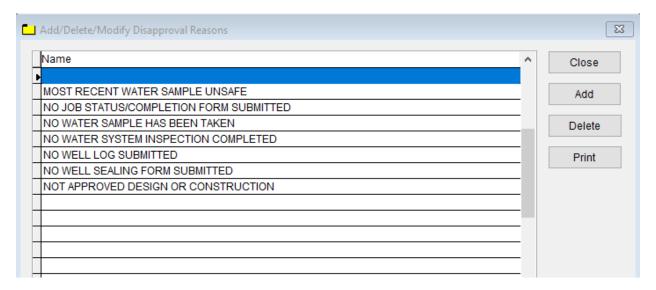
To enter Manufacturer, follow these steps (use the tab key to advance to each field):

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

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



#### **Disapproval Reasons**



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

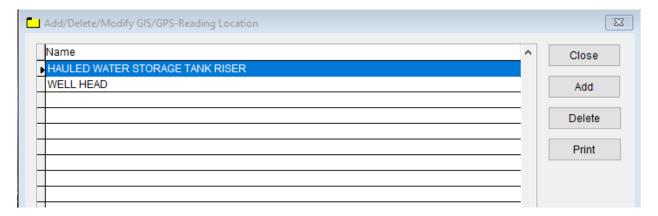
- Click **Add** and enter a **Name** to identify the **Disapproval Reasons**.
- Click on Name, Click Delete to delete the entry.

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





## **GIS/GPS – Reading Location**



To enter GIS/GPS – Reading Location, follow these steps (use the tab key to advance to each field):

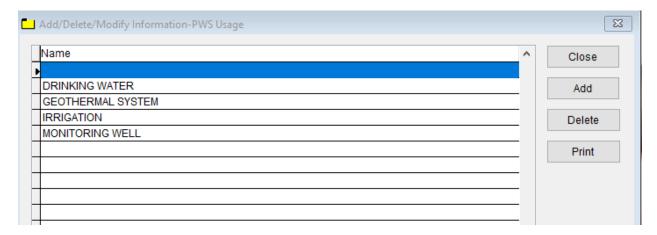
- Click Add and enter a Name to identify the Reading Location.
- Click on Name, Click Delete to delete the entry.

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





#### <u>Information – PWS Usage</u>



To enter **Information – PWS Usage**, follow these steps (use the tab key to advance to each field):

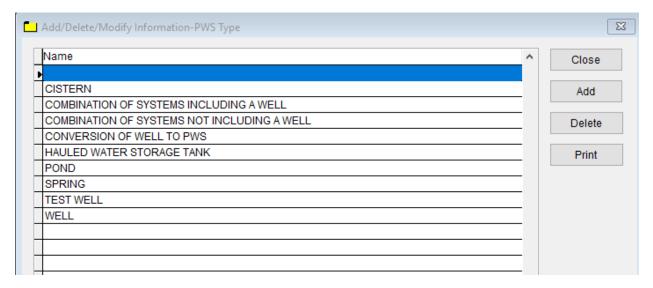
- Click Add and enter a Name to identify the PWS Usage.
- Click on Name, Click Delete to delete the entry.

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





#### <u>Information – PWS Type</u>



To enter **Information – PWS Type,** follow these steps (use the tab key to advance to each field):

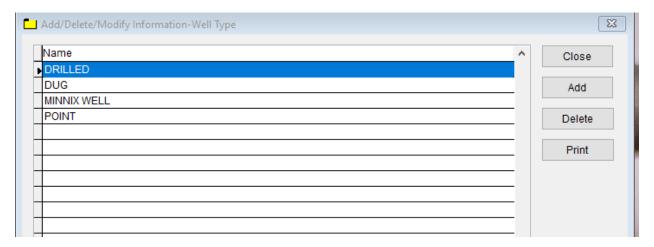
- Click **Add** and enter a **Name** to identify the **PWS Type**.
- Click on Name, Click Delete to delete the entry.

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





## **Information – Well Type**



To enter Information – Well Type, follow these steps (use the tab key to advance to each field):

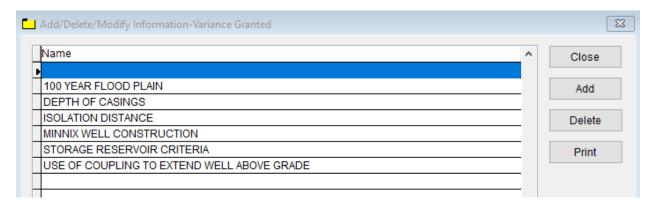
- Click Add and enter a Name to identify the Well Type.
- Click on Name, Click Delete to delete the entry.

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





## **Information – Variance Granted**



To enter Information – Variance Granted, follow these steps (use the tab key to advance to each field):

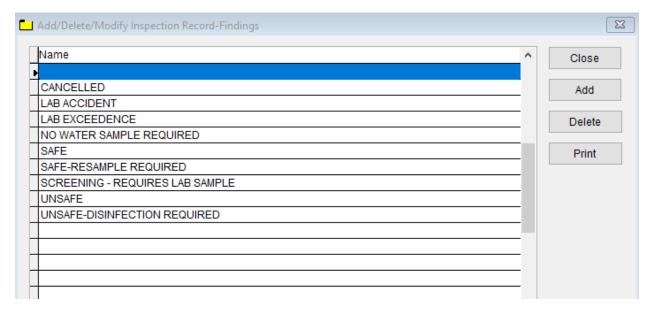
- Click Add and enter a Name to identify the Variance Granted.
- Click on Name, Click Delete to delete the entry.

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





## **Inspection Record - Findings**



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

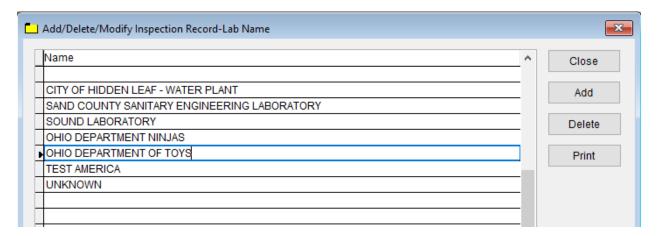
- Click Add and enter a Name to identify the Findings.
- Click on Name, Click Delete to delete the entry.

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





## **Inspection Record – Lab Name**



To enter **Inspection Record – Lab Name**, follow these steps (use the tab key to advance to each field):

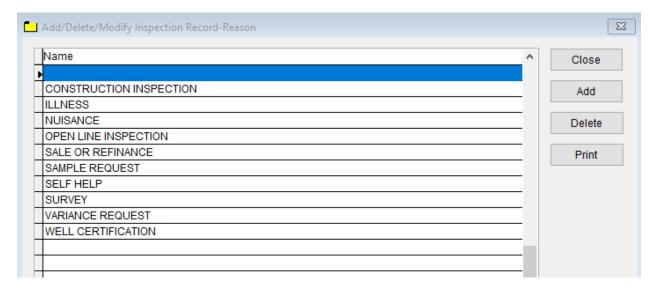
- Click **Add** and enter a **Name** to identify the **Lab Name**.
- Click on Name, Click Delete to delete the entry.

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





#### **Inspection Record – Reason**



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

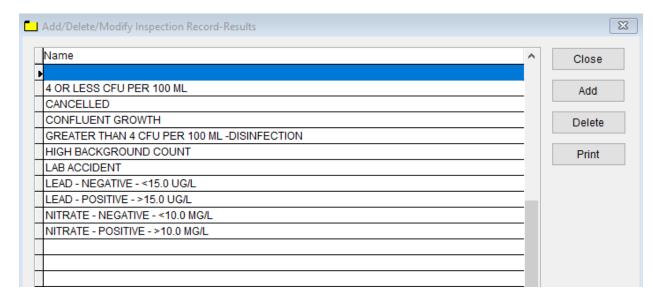
- Click Add and enter a Name to identify the Reason.
- Click on Name, Click Delete to delete the entry.

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





#### **Inspection Record - Results**



To enter Inspection Record –Results, follow these steps (use the tab key to advance to each field):

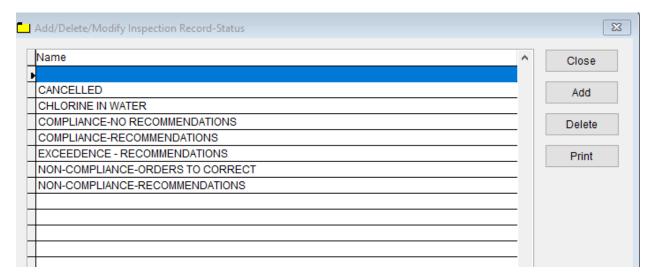
- Click **Add** and enter a **Name** to identify the **Results**.
- Click on Name, Click Delete to delete the entry.

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





#### **Inspection Record – Status**



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

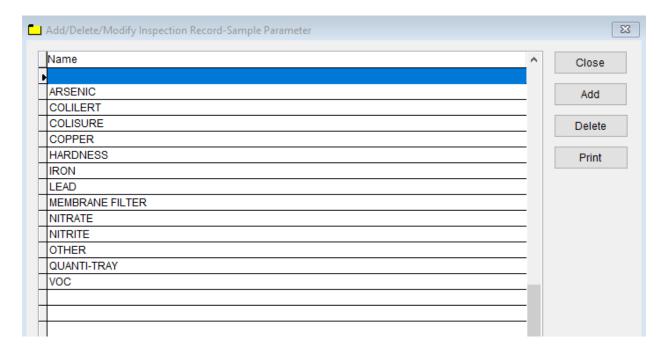
- Click Add and enter a Name to identify the Status.
- Click on Name, Click Delete to delete the entry.

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





#### **Inspection Record – Sample Parameter**



To enter **Inspection Record –Sample Parameter**, follow these steps (use the tab key to advance to each field):

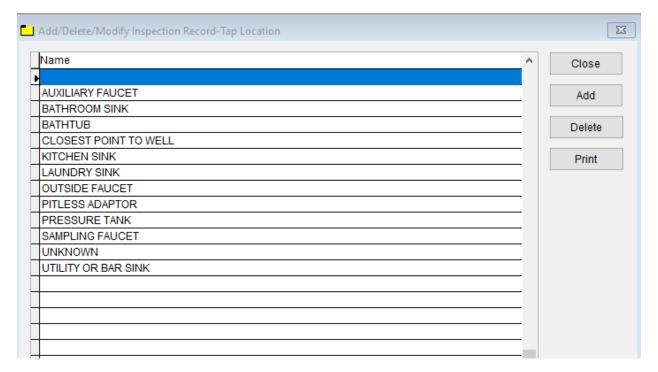
- Click Add and enter a Name to identify the Sample Parameter.
- Click on Name, Click Delete to delete the entry.

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





## **Inspection Record - Tap Location**



To enter **Inspection Record –Tap Location**, follow these steps (use the tab key to advance to each field):

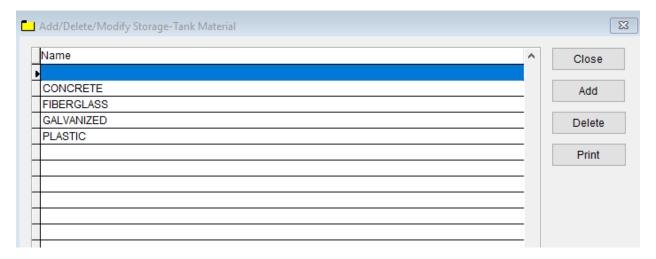
- Click Add and enter a Name to identify the Tap Location.
- Click on Name, Click Delete to delete the entry.

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





## **Storage - Tank Material**



To enter **Storage – Tank Material,** follow these steps (use the tab key to advance to each field):

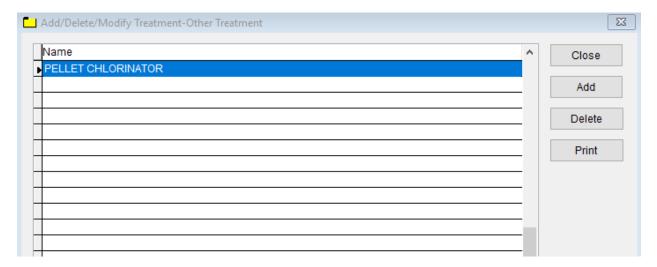
- Click Add and enter a Name to identify the Tank Material.
- Click on Name, Click Delete to delete the entry.

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





#### **Treatment – Other Treatment**



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

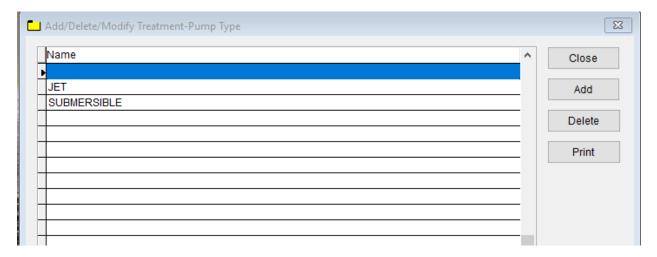
- Click **Add** and enter a **Name** to identify the **Other Treatment**.
- Click on Name, Click Delete to delete the entry.

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





#### <u>Treatment – Pump Type</u>



To enter **Treatment – Pump Type,** follow these steps (use the tab key to advance to each field):

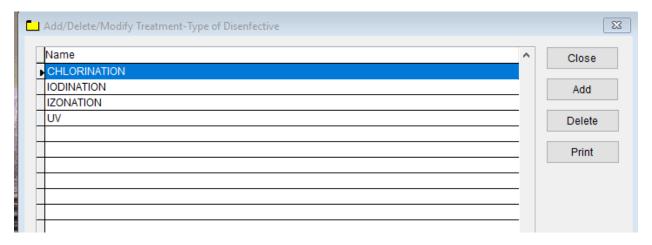
- Click Add and enter a Name to identify the Pump Type.
- Click on Name, Click Delete to delete the entry.

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





## <u>Treatment – Type of Disinfection</u>



To enter **Treatment – Type of Disinfection**, follow these steps (use the tab key to advance to each field):

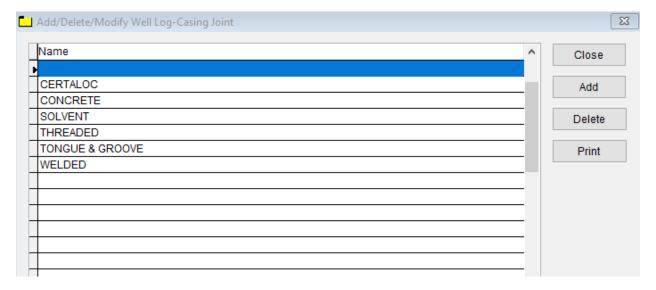
- Click **Add** and enter a **Name** to identify the **Type of Disinfection**.
- Click on Name, Click Delete to delete the entry.

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





#### **Well Log – Casting Joint**



To enter **Well Log – Casting Joint,** follow these steps (use the tab key to advance to each field):

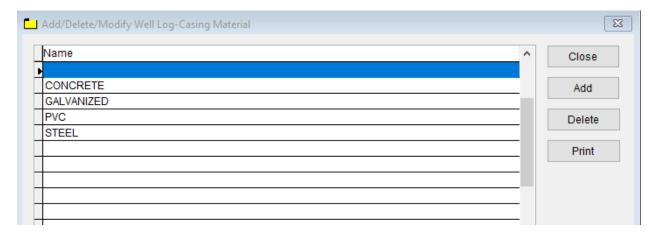
- Click Add and enter a Name to identify the Well Log Casting Joint.
- Click on Name, Click Delete to delete the entry.

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





#### **Well Log – Casting Material**



To enter **Well Log – Casting Material**, follow these steps (use the tab key to advance to each field):

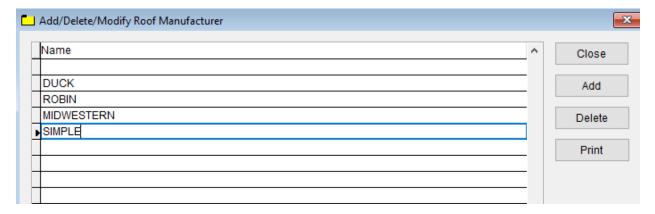
- Click Add and enter a Name to identify the Well Log Casting Material.
- Click on Name, Click Delete to delete the entry.

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





## **Well Pump Distribution – Pitless Manufacturer**



To enter Well Log – Pitless Manufacturer, follow these steps (use the tab key to advance to each field):

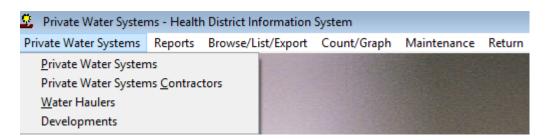
- Click Add and enter a Name to identify the Well Log Pitless Manufacturer.
- Click on **Name**, Click **Delete** to delete the entry.

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



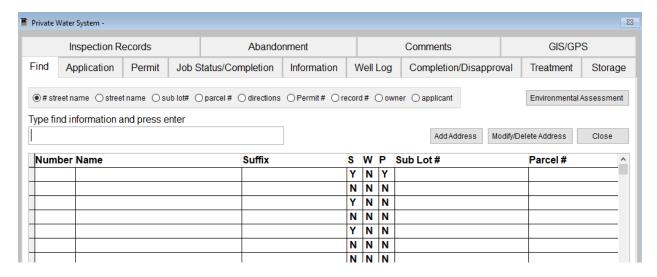


# **Chapter 2: Entering in Private Water Systems**



#### **Private Water Systems Find Tab**

Navigate to: Private Water Systems > Private Water Systems



Under the **Find** tab there are options to search **Private Water Systems** entries. Search options consist of: **by Street** number, **Street** name, **Sub lot** number, **Parcel** number, **Directions**, **Permit** number, **Record** number, and **by** applicant

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** button.

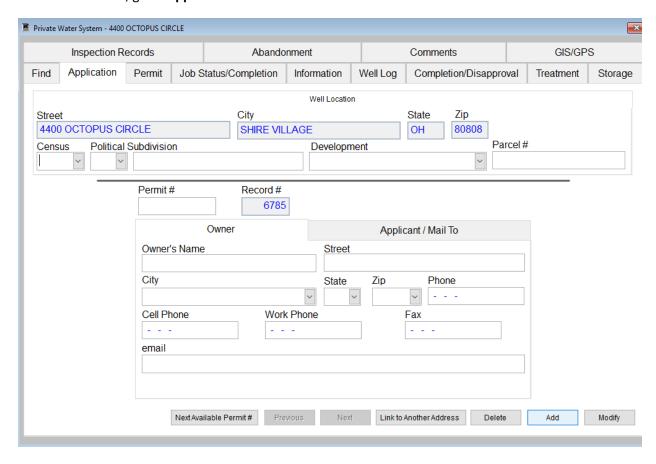
Click on a record and click Modify/Delete Address button to make changes to an existing address.





# **Private Water Systems – Application Tab**

From the **Find tab**, go to **Application Tab**. Click **Add** to enter a new record.



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.

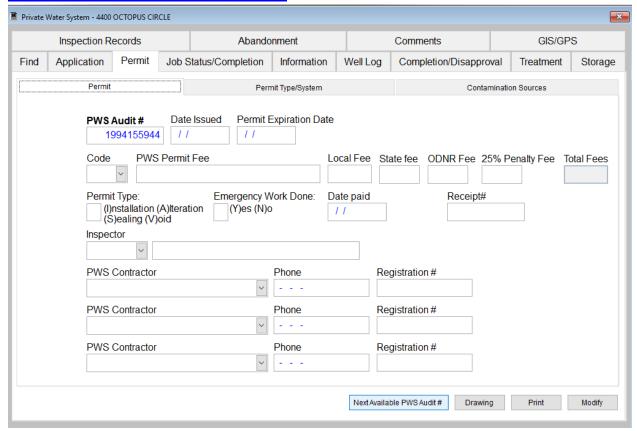
**Next Available Permit #** will automatically add a permit number to the record.

**Link to Another Address** button will link this record to another address.





# <u>Private Water Systems – Permit Tab</u>



#### Permit Sub Tab

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.

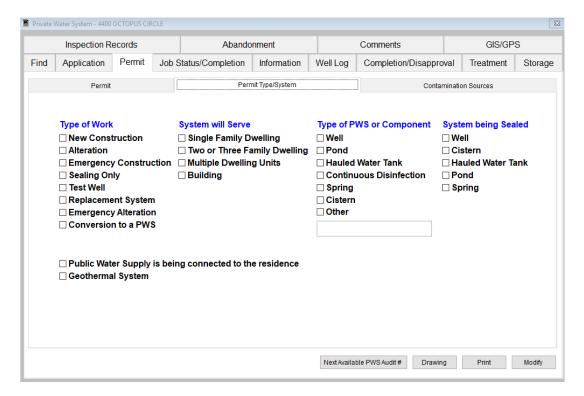
Next Available PWS Audit # will automatically add a PWS Audit number to the record.

**Drawing** allows you to add a file to this record.





#### Permit Type/System Sub Tab



**Checkmark** the appropriate information related to 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.

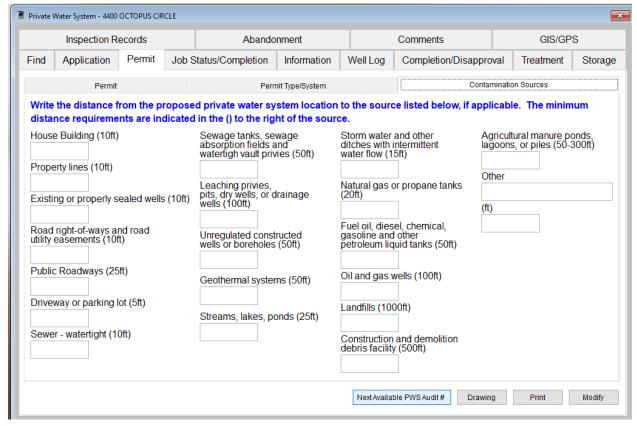
**Next Available PWS Audit #** will automatically add a PWS Audit number to the record that will be shown on Permit Sub Tab.

**Drawing** allows you to add a file to this record.





#### Contamination Sources Sub Tab



Type the appropriate distance from the private water system location to the source in the list. The minimum distance requirements are shows to the right of the source.

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.

**Next Available PWS Audit #** will automatically add a PWS Audit number to the record that will be shown on Permit Sub Tab.

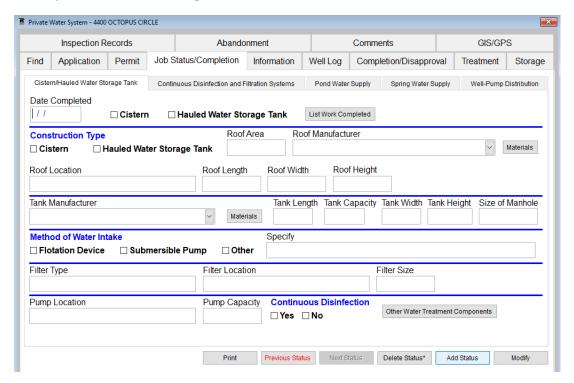
**Drawing** allows you to add a file to this record.





# **Job Status/Completion**

#### Cistern/Hauled Water Storage Tank Sub Tab



Type/checkmark 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 right-click **Delete** to delete current record.

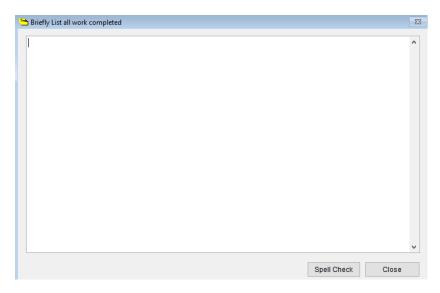
**Add Status** button allows you to add a new status to a record.

(Continued on next page)





**List Work Completed, Materials, Other Water Treatment Components** buttons will open text windows for you to type in information.





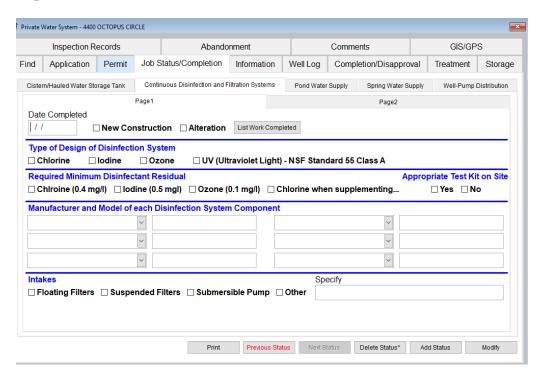


# **Continuous Disinfection and Filtration Systems**

On Page 1 and Page 2 fill in the information related to continuous disinfection and filtration systems. When appropriate, choose information from drop down boxes. Buttons are explained in table below.

Field/Button	Description
List Work Completed	Opens window to record list work completed
Print	Opens window with printing options
Previous Status	Takes to previous status
Next Status	Takes to next status
Delete Status*	Right click to delete a status
Add Status	Click to add a new status
Modify	Allows user to make changes to a status
Additional Filters	Allows user to type additional filters
Comments	Allows user to write comments related to record

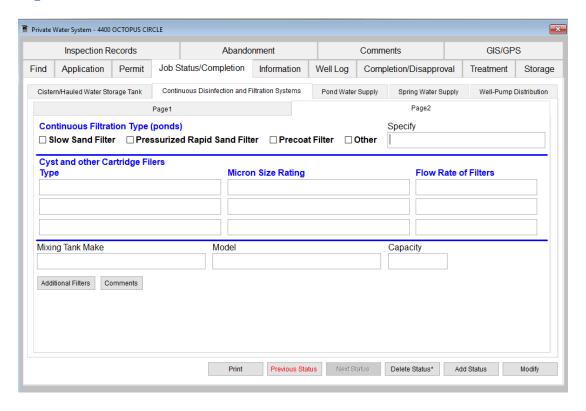
#### Page 1







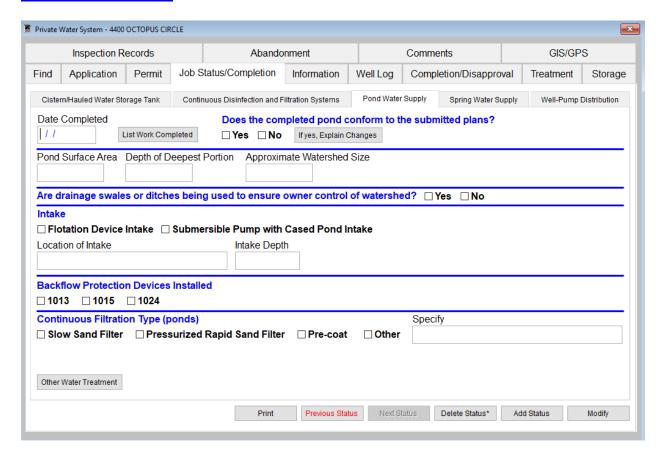
# Page 2







#### **Pond Water Subtab**



Enter Date Completed first.

Fill in and check mark appropriate information.

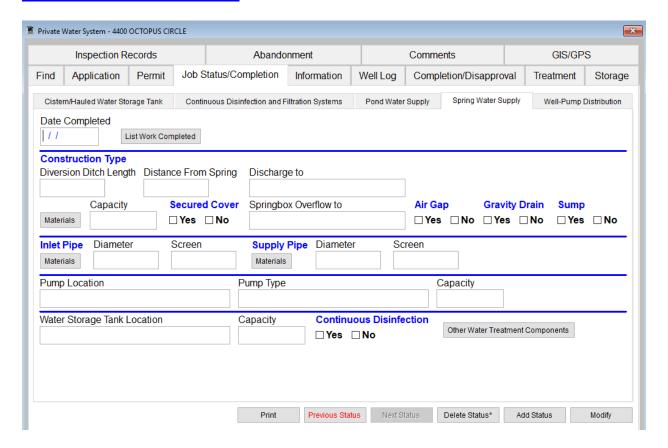
Buttons: List work Completed, If yes, Explain Changes, and Other Water Treatment all open text boxes to write information.

**Print** opens a window with printing options, **Previous Status** changes page to a previous status entered, **Next Status** changes page to next status entered, Right-click **Delete Status\*** will remove record, **Add Status** creates a new status, and **Modify** button allows user to make changes.





#### **Spring Water Supply Subtab**



Enter Date Completed first.

Fill in and check mark appropriate information.

Buttons: List Work Completed, Other Water Treatment Components, and Materials all open text boxes to write information.

**Print** opens a window with printing options, **Previous Status** changes page to a previous status entered, **Next Status** changes page to next status entered, Right-click **Delete Status\*** will remove record, **Add Status** creates a new status, and **Modify** button allows user to make changes.





## **Well – Pump Distribution Subtab**

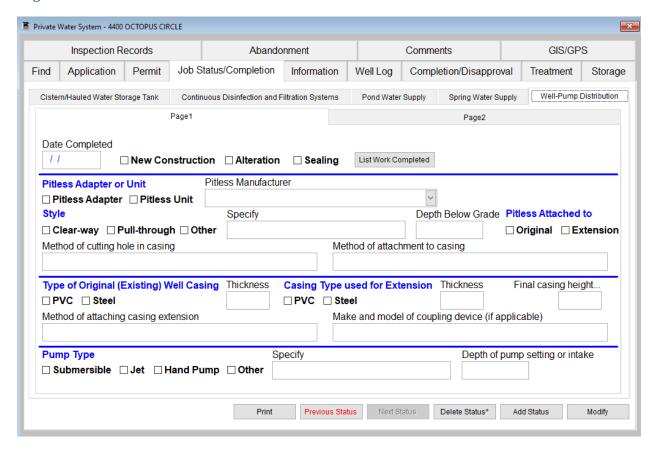
Enter Date Completed first.

Fill in and check mark appropriate information.

Buttons: **List work Completed** opens text box to write information.

**Print** opens a window with printing options, **Previous Status** changes page to a previous status entered, **Next Status** changes page to next status entered, Right-click **Delete Status\*** will remove record, **Add Status** creates a new status, and **Modify** button allows user to make changes.

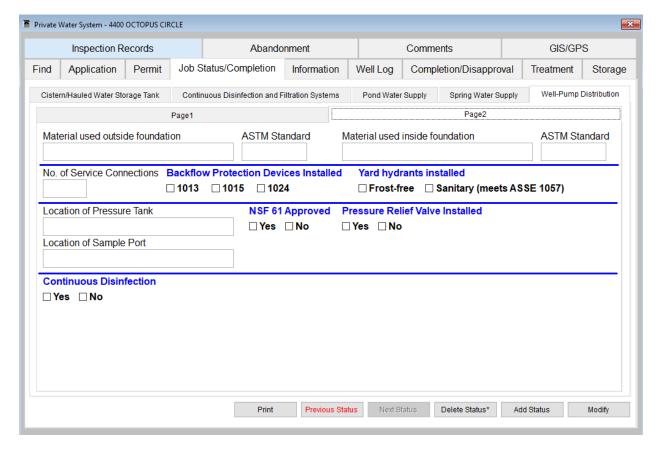
#### Page 1







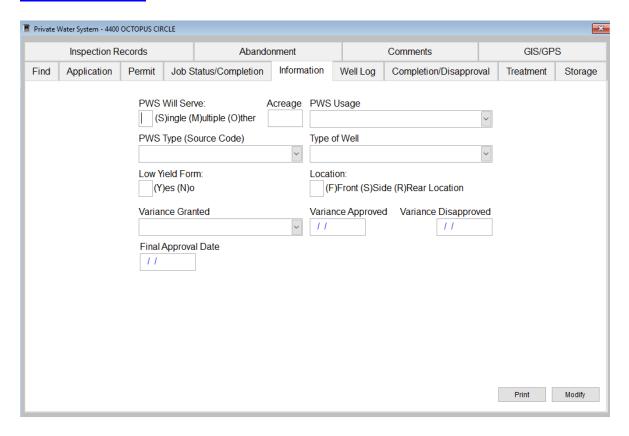
#### Page 2







## **Information Tab**



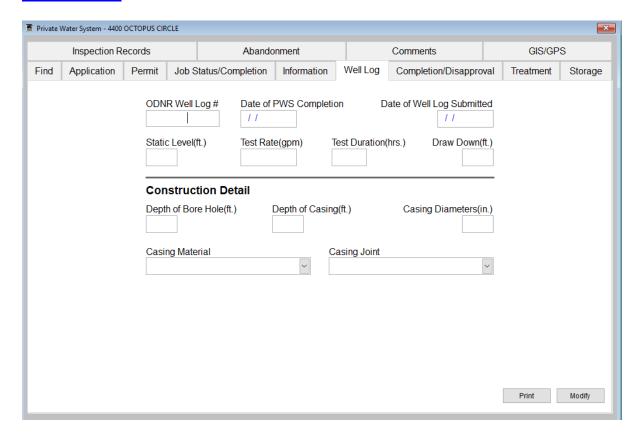
Fill in and select appropriate information relating to Private Water Systems

**Print button** will open a window with printing options.





# **Well Log Tab**



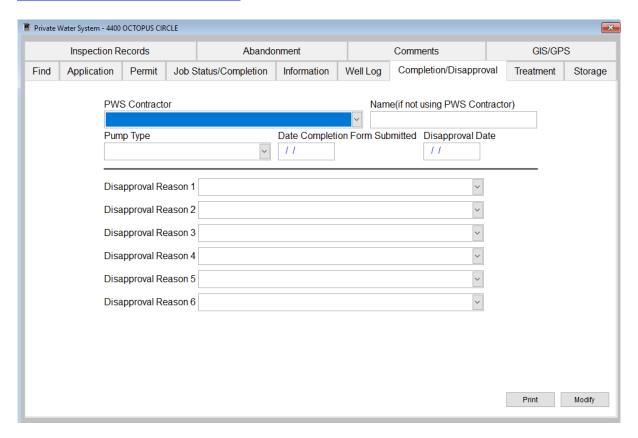
Fill in and select appropriate information relating to Private Water Systems

**Print button** will open a window with printing options.





# **Completion/Disapproval Tab**



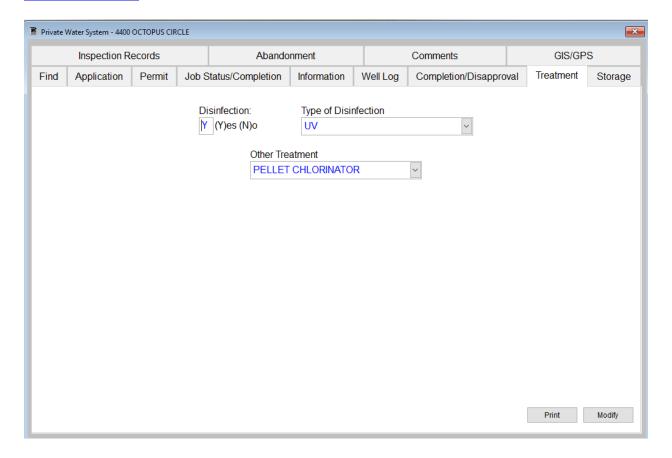
Fill in and select appropriate information relating to Private Water Systems

**Print button** will open a window with printing options.





## **Treatment Tab**



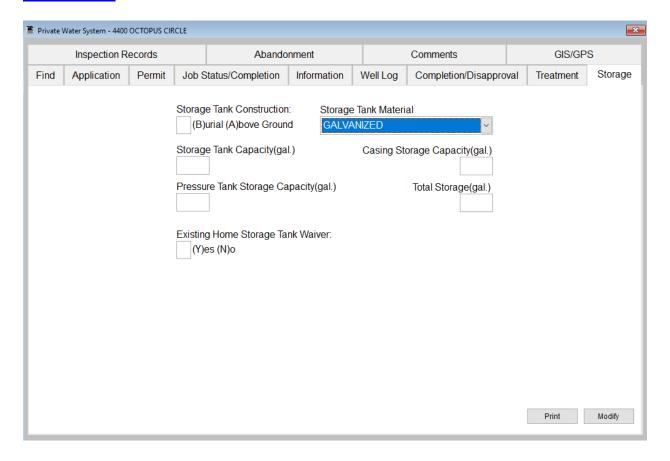
Fill in and select appropriate information relating to Private Water Systems

**Print button** will open a window with printing options.





# **Storage Tab**



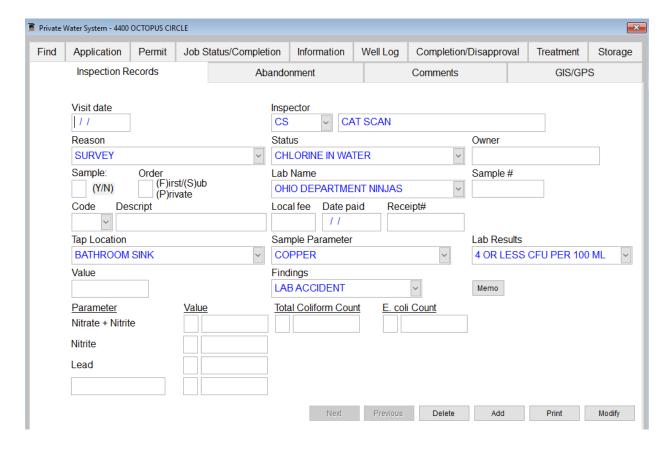
Fill in and select appropriate information relating to Private Water Systems

**Print button** will open a window with printing options.





# **Inspection Records Tab**



Enter Visit date first.

Fill in and check mark appropriate information.

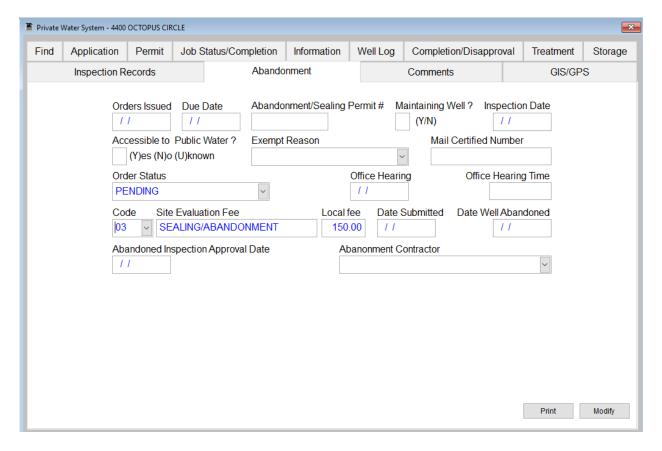
Buttons: **Memo** opens text box to write information.

**Print** opens a window with printing options, **Previous Status** changes page to a previous status entered, **Next Status** changes page to next status entered, Right-click **Delete Status\*** will remove record, **Add Status** creates a new status, and **Modify** button allows user to make changes.





## **Abandonment Tab**



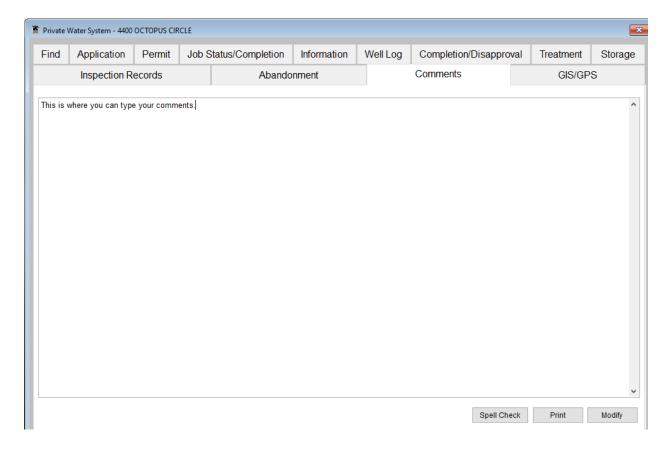
Fill in and select appropriate information relating to Private Water Systems

**Print button** will open a window with printing options.





## **Comments Tab**



#### Type comments related to record in this tab.

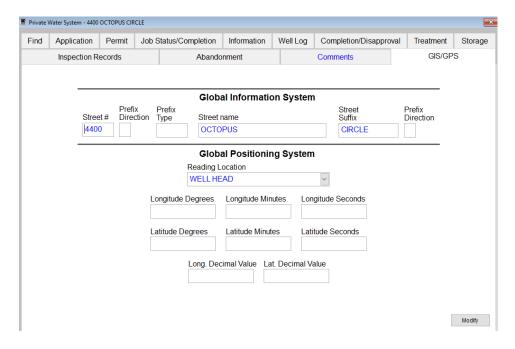
**Print button** will open a window with printing options.

Modify button will allow user to make changes to existing record.

**Spell Check button** will go through the comments and look for spelling errors.



# **GIS/GPS Tab**

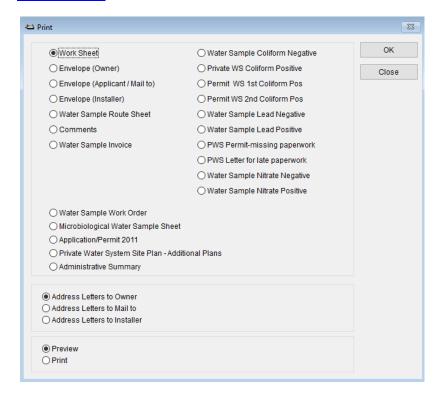


This tab allows you to enter your **GPS** coordinates for mapping purposes.

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.
Reading Location	Choose option from drop-down list



#### **Print Button:**



#### **Print Button**

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

Field/Button	Description
Work Sheet	Generates a work sheet with data entered in the module
Envelope(Owner)	Generates an envelope based on the Owner
Envelope(Applicant/Mail to)	Generates an envelope based on application/mail to
Envelope(Installer)	Generates an envelope based on installer
Water Sample Route Sheet	Generates a water sample route sheet
Comments	Generates a report with comments
Water Sample Invoice	Generates an invoice with water samples
Water Sample Coliform Negative	Generates a report of water sample coliform negative
Private WS Coliform positive	Generates a private water sample coliform positive
Permit WS 1 <sup>st</sup> Coliform Pos	Generates a permit based on WS 1 <sup>st</sup> Coliform pos





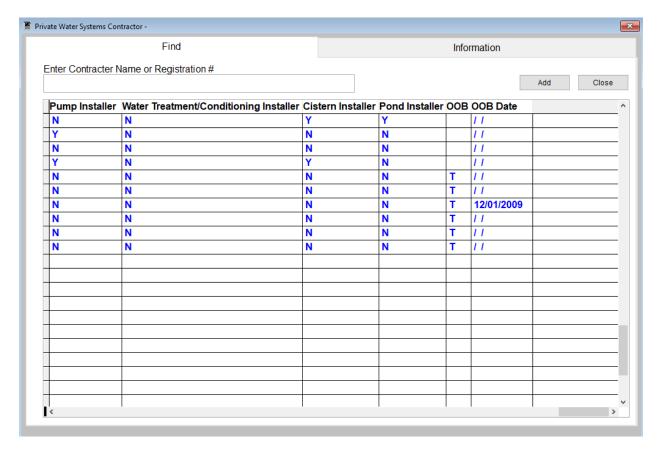
# Private Water Systems User Manual

Permit WS 2 <sup>nd</sup> Coliform pos	Generates a permit WS 2 <sup>nd</sup> coliform pos
Water Sample Lead Negative	Generates a report of water sample lead negative
Water Sample Lead Positive	Generates a report of water sample lead positive
PWS Permit-missing paperwork	Generates a PWS permit-missing paperwork report
PWS Letter for late paperwork	Generates a PWS letter for late paperwork report
Water Sample Nitrate Negative	Generates a water sample nitrate negative report
Water Sample Nitrate Positive	Generates a water sample nitrate positive report
Water Sample Work Order	Generates a water sample work order
Microbiological water sample sheet	Generates a microbiological water sample sheet
Application/Permit 2011	Generates an application/permit 2011
Private Water System Site Plan – Additional Plans	Generates a private water system site plan with additional plans
Administrative summary	Generates an administrative summary report
Address Letters to Owner	Generates letters addressed to owner
Address letters to mail to	Generates letters addressed to mail to
Address Letters to Installer	Generates letters addressed to installer





# **Private Water Systems Contractors - Find Tab**



Under the Find tab there are options to search by Entering Contractor Name or Registration Number.

Hit **Enter** to perform the search.

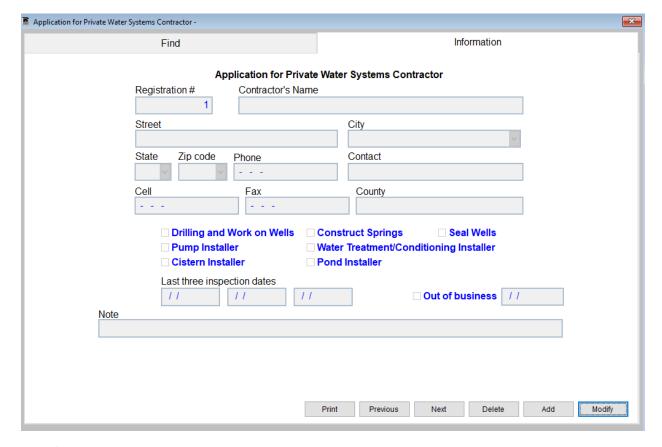
To add new records click the **Add** button.

Click on the Address that is entered and click on the Information Tab.





# **Private Water Systems Contractors - Information Tab**



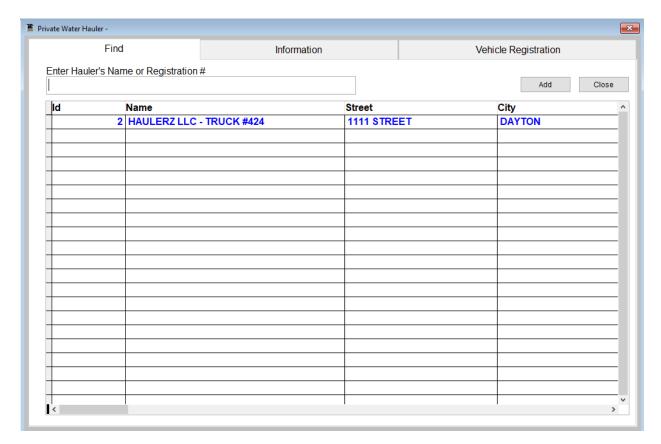
Fill in/check mark appropriate information.

Buttons: **Print** will open a window with printing options, **Previous** will go to previous record, **Next** will go to next record, **Delete** will remove a record, **Add** will add a new record, and **Modify** will allow user to make changes to existing record.





# **Water Haulers Find Tab**



Under the **Find** tab there are options to search **by Entering Hauler's Name or Registration number**Hit **Enter** to perform the search.

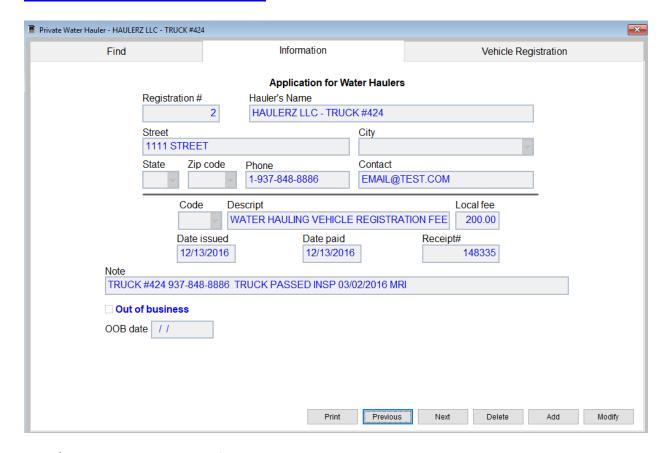
To add new records click the Add button.

Click on the Address that is entered and click on the Information Tab.





# **Water Haulers Information Tab**



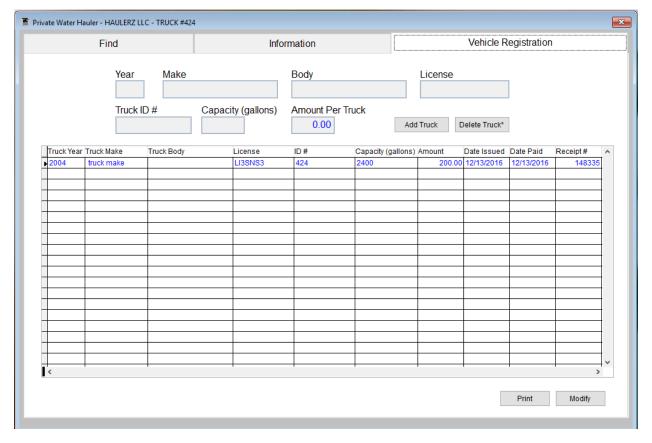
Fill in/check mark appropriate information.

Buttons: **Print** will open a window with printing options, **Previous** will go to previous record, **Next** will go to next record, **Delete** will remove a record, **Add** will add a new record, and **Modify** will allow user to make changes to existing record.





# **Water Haulers Vehicle Registration Tab**



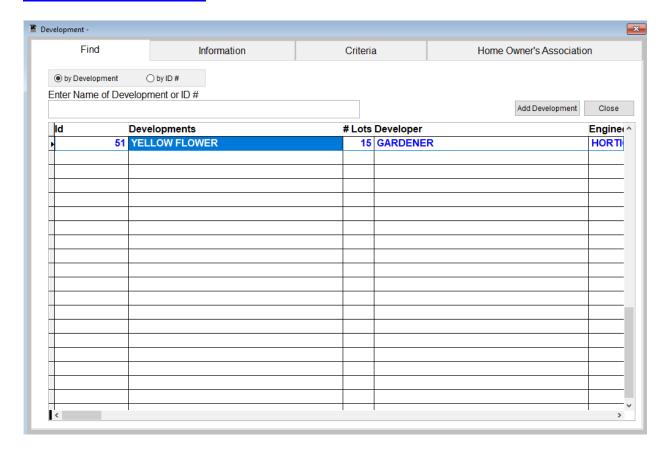
Fill in vehicle registration information and click **Add Truck** button to add a new truck.

To delete a truck, select a Truck record in the table and right-click Delete Truck\*





# **Developments Find Tab**



Under the Find tab there are options to search by Entering Name of Development or ID number.

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

Hit **Enter** to perform the search.

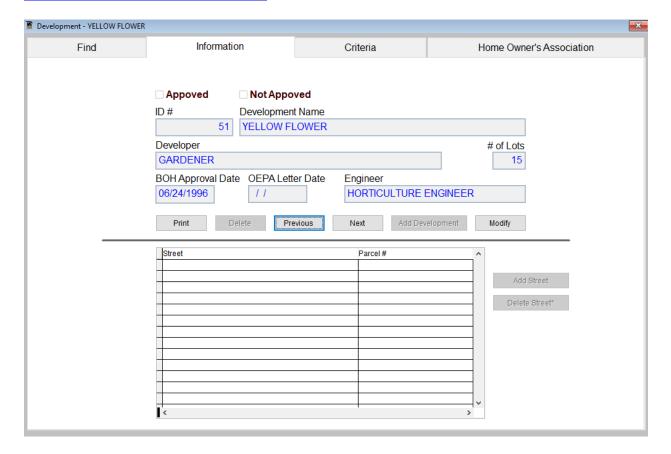
To add new records click the Add button.

Click on the Address that is entered and click on the Information Tab.





# **Developments Information Tab**



Fill in/check mark appropriate information.

Add Development button will add information to system.

Buttons: **Print** will open a window with printing options, **Previous** will go to previous record, **Next** will go to next record, **Delete** will remove a record, **Add** will add a new record, and **Modify** will allow user to make changes to existing record.

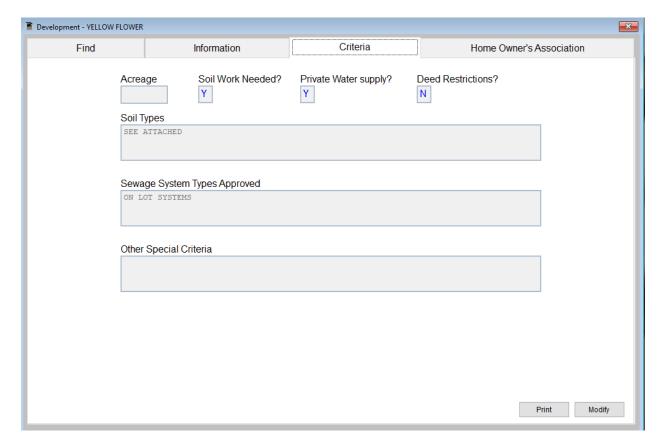
**Add Street** button will open the table so you can add a street to record.

**Delete Street\*** - Must right click this button to remove a street that is selected.





# **Developments Criteria Tab**



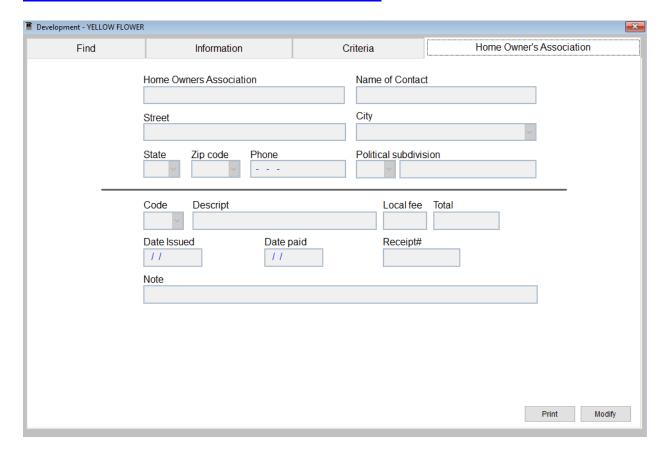
# Fill in appropriate information.

**Print button** will open a window with printing options.





# **Developments Home Owner's Association Tab**



#### Fill in appropriate information.

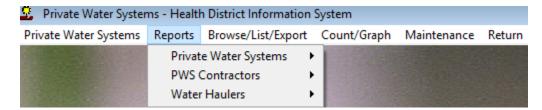
**Print button** will open a window with printing options.





# **Chapter 3: Reports**

Navigate to: **Environmental Health> Private Water Systems > 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
Private Water Systems	<u> </u>
Dates/Numbers/Contractors	Generates a report with dates, numbers, and contractors
Dates/Numbers/Contractors – Last Water Sample	Generates a report with dates, numbers, and contractors with last water sample included
Disapproval Letters	Generates disapproval letters
Envelopes for Disapproval letters	Generates the envelopes for the disapproval letters
Envelopes – Owner	Generates envelopes addressed to the owner
Filing Labels	Generates filing labels
Labels – Owner	Generates labels with owner
Letters A-J	Generates letters created in A-J
Permit Expiration	Generates report with permit expiration
ODH-Permit Transmittal	Generates an ODH permit transmittal
ODH-Permit Report	Generates an ODH permit report
Sealing – Date Orders Issued	Generates a sealing date orders issued report
Sealing – Abandoned Approval Date	Generates a sealing abandoned approval date report
Water Samples	Generates report with water samples
ODH – Old Transmittals	Holds all of the old transmittal forms to ODH





# **Private Water Systems User Manual**

ODH – Old Permit Reports	Generates the old ODH permit reports	
PWS Contractors		
Envelopes	Generates envelopes for PWS contractors	
Labels	Generates labels for PWS contractors	
List	Generates a list of PWS contractors	
Water haulers		
Applications	Generates applications for water haulers	
Envelopes	Generates envelopes for water haulers	
Labels	Generates labels for water haulers	
List	Generates a list of water haulers	

# Most Reports will have a date range you can enter before the report is generated:







# **Chapter 4: Browse/List/Export**

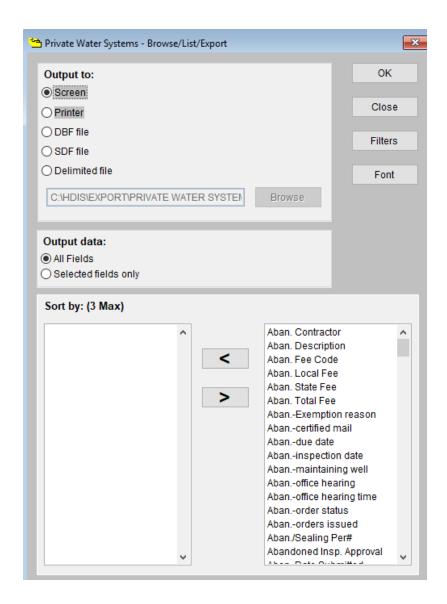
Inside the Private Water Systems module navigate to the Browse/List/Export.

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.





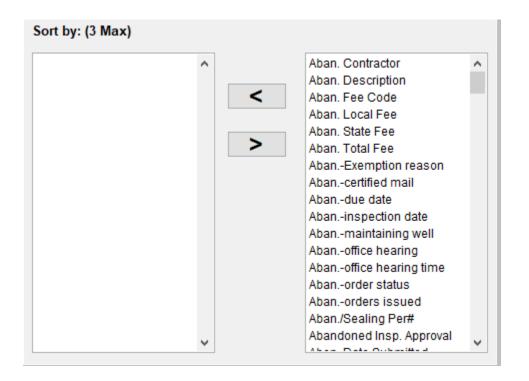


# **Sort by**

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.



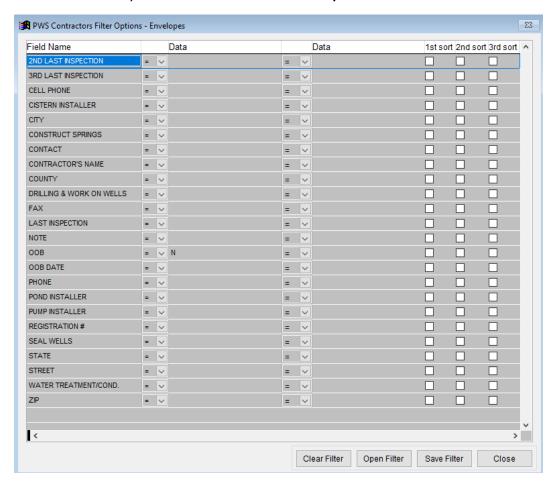




## **Filters**

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

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



\*\* 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 Private Water Systems module navigate to the Count/Graph.

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

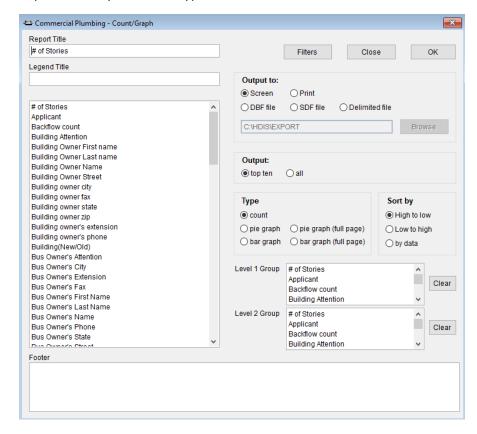
This section allows you to create a Count, Pie graph, or bar graph of the data. There is a **Report Title**, **Legend Title**, **List of Field Names**, **Footer**, **and Output to** section. The **Output to** gives you options on how you want to display or store your results.

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 <u>Filters</u> in the <u>Browse/List/Export</u> 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 I Group** and **Level 2 Group** options will display. Select the best options dependent on your search type.



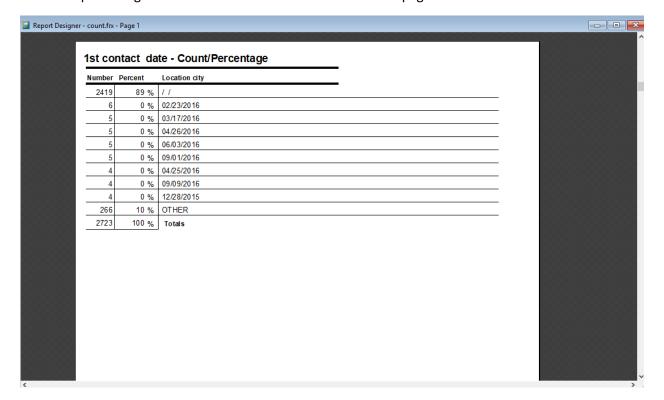




## **Count**

Here is an example of what the "Count" type would look like.

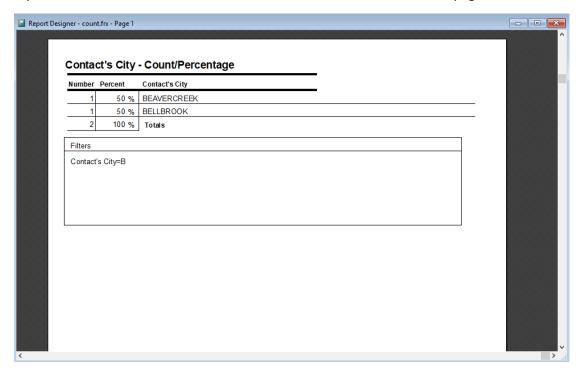
There are percentages and totals on the side and bottom of the page.







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



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





100% 🗸



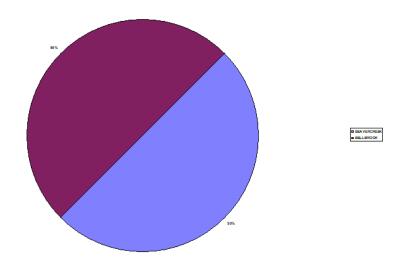
# **Pie Graph**

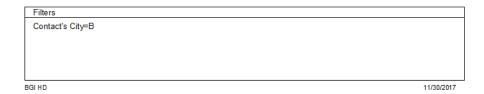
Here is an example of what the "Pie Graph" type would look like.

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





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





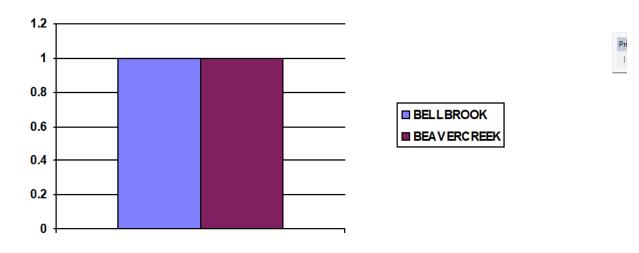


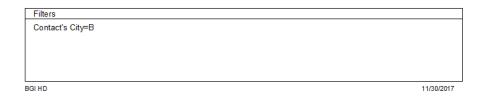
# **Bar Graph**

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





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





100% 🗸

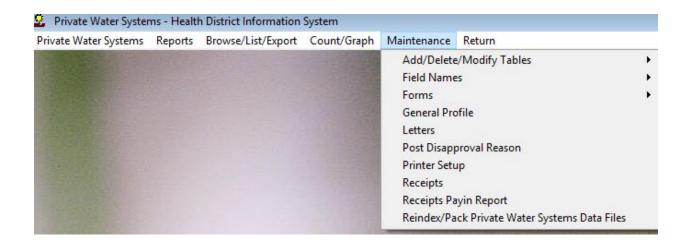


# **Chapter 6: Maintenance**

Navigate to: Environmental Health > Private Water Systems > Maintenance

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

This area is where you can <a href="Add/Delete/Modify">Add/Delete/Modify</a> tables along with other actions you use in the Private Water Systems data entry windows.

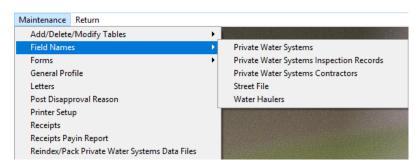






## **Field Names**

#### Navigate to: Maintenance > Field Names

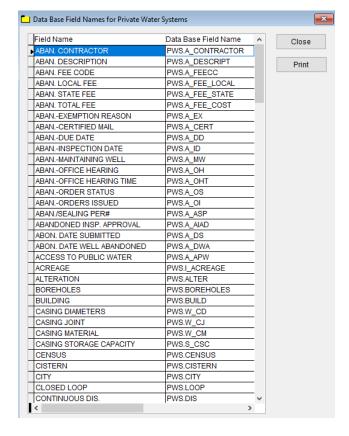


The field names listing can be very useful in determining what fields you wish to utilize to merge data for letters or when creating ad hoc reports. The field name column is used to merge data into letters.

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\*

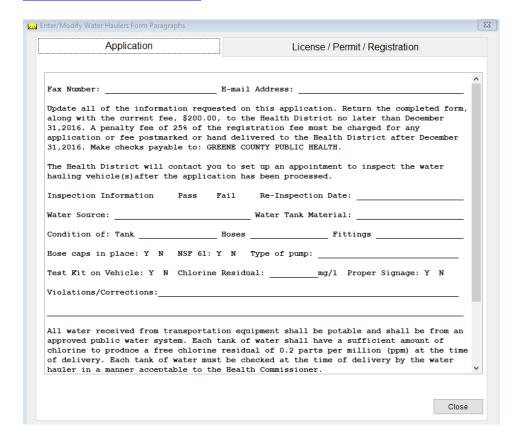
See Letters for more information on Letters.







## **Forms – Water Haulers**



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.





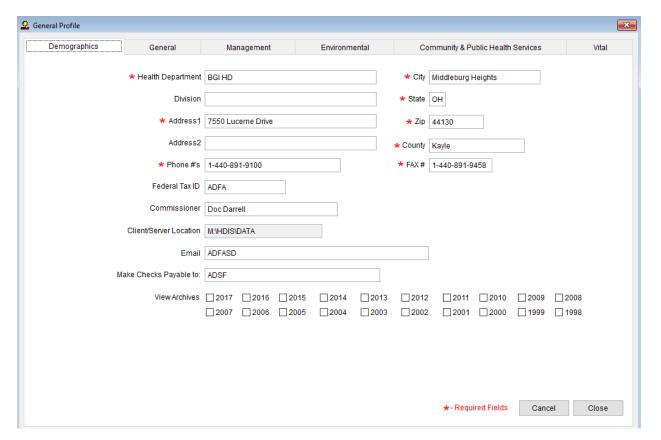
# **General Profile**

Navigate to: Maintenance > General Profile

The General Profile allows you to fill out the basic information regarding Private Water Systems.

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.



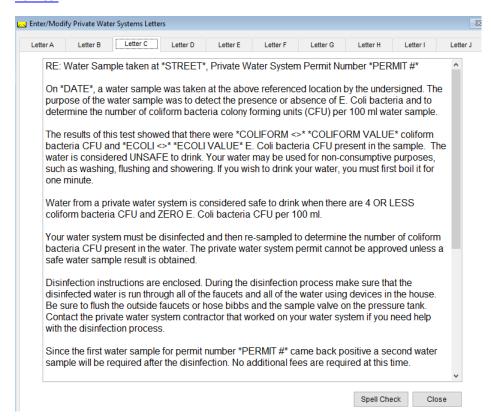




#### **Letters**

#### 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 **Private Water Systems**. 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

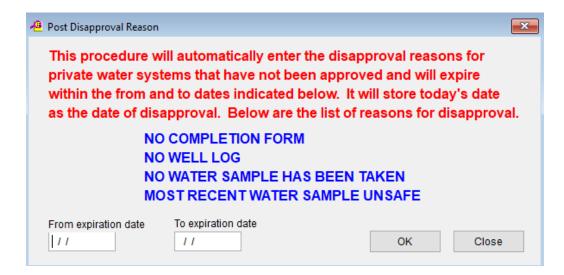
Examples: \*OWNER\* = JOHN DOE

\*Owner\* = John Doe \*type of animal\* = dog





## **Post Disapproval Reason**



Enter the **from** and **to** dates to automatically enter the disapproval reasons for private water systems that have not been approved and will expire. The current date will be stored as the date for the disapproval.



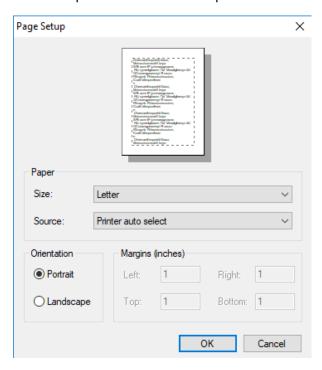


# **Printer Setup**

## 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**.

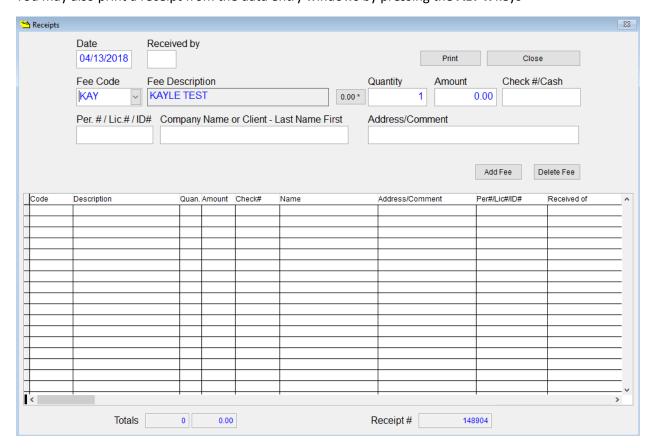






## **Receipts**

If you have the **Receipts** module, you have the capability to print any receipt through the **Maintenance** tab You may also print a receipt from the data entry windows by pressing the **ALT-R** keys



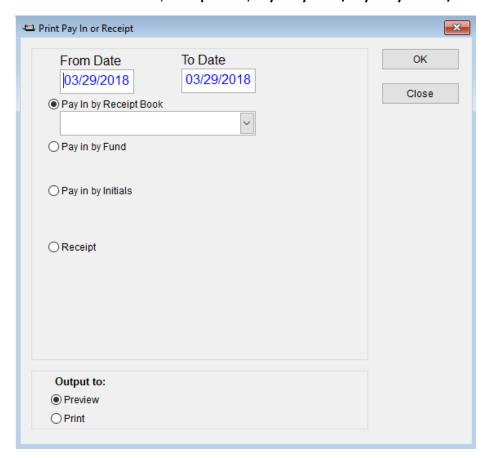




# Receipts Pay - In Report

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.







## **Reindex/Pack Private Water Systems Data Files**

Navigate to: Maintenance > Reindex/Pack Private Water Systems 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.

