

# **Cross-Track 5.2**

## **Installation and Usage Guide**

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# Cross-Track 5 Installation

## ***System Requirements***

The minimum system requirements to run Cross-Track 5 are a PC with:

- Microsoft Windows XP or Vista
- Microsoft Word 97 or later (optional, see below)
- CD-ROM or DVD drive
- Sufficient RAM memory to run Windows comfortably
- 300 MB available storage on the hard drive

Microsoft Word is required to print the customizable version of the letters. You have an option, however, of using the non-customizable built-in letters that do not require Microsoft Word. See *System Options* under the Contents section entitled *Getting Started*.

## ***Installation Procedure***

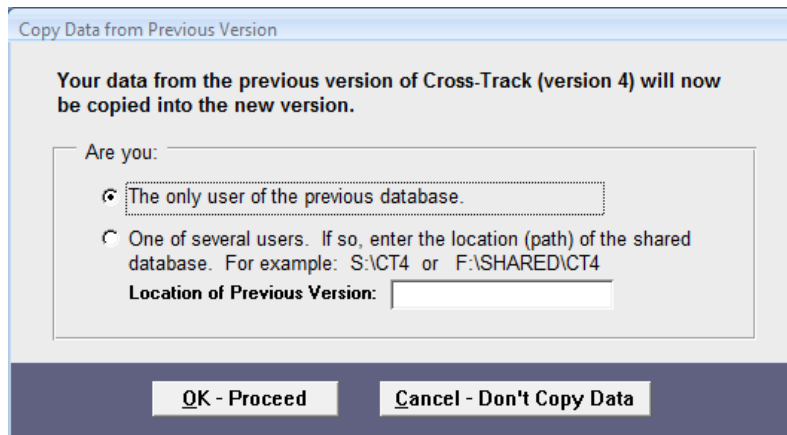
To install Cross-Track 5, insert the CD into the CD-ROM drive. The installation procedure should start automatically.

Follow the instructions displayed by the installation program. Cross-Track 5 will be installed on your C-drive in a folder named “CT5”, and a shortcut file (icon) will be placed on your desktop. Folder CT5 will include a subfolder named Letters, containing the customizable mail merge letters, and another subfolder named Photos, in which you may place photo images of assemblies.

## **Previous Cross-Track Users**

Installation of Cross-Track 5 does not uninstall the previous release. If you have been using the previous version of Cross-Track (version 4), your current data will be copied into the new version the first time you run it. A popup window will be displayed asking whether you were the only user or one of several users (*Figure 1*).

If you were the only user, it is assumed that your previous version is still located in a folder named “CT4” on your C-drive, where it was initially installed. Otherwise, you will have to provide the current location (drive letter and folder) of the previous version.



**Figure 1. Copy Data from Previous Version**

After the data from Cross-Track 4.0 has been copied into Cross-Track 5, another popup window will be displayed asking if you have customized any of the letters in the previous version (*Figure 2*). If so, you will need to copy them into the new version so as not to lose your customization. Note that there have been some name changes. The term “residential questionnaire” replaces “residential survey”, and “site survey” replaces “inspection”. Only the names of your customized letters will be changed automatically as they are copied in.

Copy Customized Letters

Please check any letters that you have customized in the previous version of Cross-Track. They will be copied into the new version, replacing the Cross-Track 5 letters.

Pick	Letter (name in previous version)	New Name
<input checked="" type="checkbox"/>	Residential Survey Letters	Residential Questionnaire Letters
<input type="checkbox"/>	Residential Survey Follow-Ups	Residential Questionnaire Follow-Ups
<input type="checkbox"/>	Initial Inspection Notices	Initial Site Survey Notices
<input type="checkbox"/>	Inspection Follow-Ups (Asm Req)	Site Survey Follow-Ups (Asm Req)
<input type="checkbox"/>	Inspection Follow-Ups (Asm Not Req)	Site Survey Follow-Ups (Asm Not Req)
<input type="checkbox"/>	Thermal Expansion Letters	(Same)
<input type="checkbox"/>	Scheduled Test Notices	(Same)
<input type="checkbox"/>	1st Warning Notices	(Same)
<input type="checkbox"/>	2nd Warning Notices	(Same)
<input type="checkbox"/>	3rd Warning Notices	(Same)
<input type="checkbox"/>	Final Shut-Off Notices	(Same)

OK - Proceed      Cancel - Don't Copy Letters

**Figure 2. Copy Customized Letters**

You may decide to use all or some of the new Cross-Track 5 letters by leaving the box beside the letter unchecked, as shown above in *Figure 2*.

Once you have successfully installed Cross-Track 5 and copied in the data from the previous version, you should start using the new version and stop using the old. Do not continue to use the old version, as you will not be able to merge the data between the old and new. You should delete the old icon from your desktop and uninstall the previous version.

## Shared Usage

Cross-Track 5 may be installed on a local area network for shared usage by multiple PC's. It is important to follow the sequence in order:

1. Follow the normal installation procedure for the first PC and, if you were a previous Cross-Track user, copy in the data and, if you want, your customized letters from the previous version (see Figure 2).
2. Then move the entire CT5 folder, including its subfolders, from the C-drive to a drive or folder where it can be shared.
3. Change the shortcut file (icon) on the desktop to point to the new location. (Right-click the icon, select properties and, in the target field, change "C:\CT5" wherever you see it – it will appear twice in the target field -- to the shared drive and folder, e.g. where "S" is your shared drive, change the C-drive to "S:\CT5\Bmi5.mdb" /wrkgrp "S:\CT5\System.mdw").
4. Run the file named "trusted.reg" that is included in the CT5 folder. This is an executable file; you can run it by double-clicking the file name. Its purpose is to allow the shared database to be opened without getting a Microsoft security warning.
5. Repeat the installation of the Cross-Track CD onto each PC that will access Cross-Track, but do not re-copy the old data or customized letters. After installing Cross-Track on these PC's, change each shortcut desktop icon to point to the shared location, as in step 3 above. Also run "trusted reg" on each PC, as in step 4 above.
6. If desired, you may delete the CT5 folder on the C-drive of each of the PC's.

**The only items from the download of the Cross-Track 5 disk necessary to access Cross-Track 5 on each PC are the desktop shortcut icon that is pointed to the shared location and the limited version of the program, Access 2007, that is automatically installed in the Program Files folder on your C-Drive. When the first Cross-Track letter is generated from your PC, a new CT5 folder will automatically appear on your C-drive that will contain the 3 data source files (see pages 26 – 27 for more detail on the data source files).**

# Getting Started

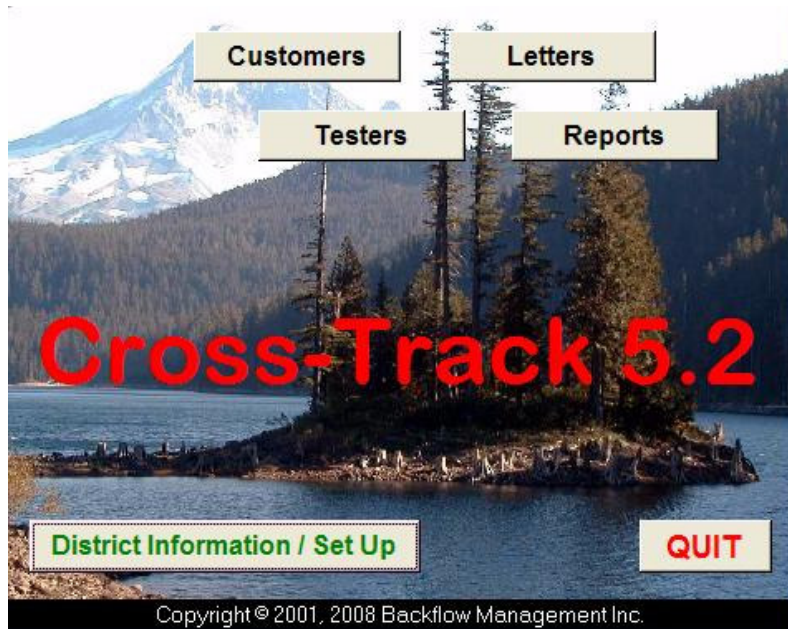
## ***District Information and Setup***

→ The first time you use Cross-Track 5, you need to enter or verify the district information, scheduling, and system options.

Start Cross-Track by double clicking the shortcut (icon) on your desktop. The first screen you will see is the main menu (*Figure 3*). From the main menu click the District Information / Set Up button in the lower left corner. This will display the main page of the district information screen (*Figure 4*).

If you did not have a previous version of Cross-Track installed, all fields on the district information screen will be blank. Start by entering the district name at the top of the screen, then enter the remaining information. Make sure you enter the contact name, title, and contact phone, as this information will appear on the letters you send to your customers. Be sure the person is the appropriate contact for responding to customer questions.

Hint: You can import or copy and paste an actual contact person's signature or use a font that resembles a signature into your letters when customizing them.



***Figure 3. Main Menu***

Service District Information

District Name:

Main Page | **Scheduling - Test Notices** | Scheduling - Other Letters | System Options

**DISTRICT ADDRESS**

# 1:

# 2:

City:

State/Province:  Zip:

Phone:  Contact:

Fax:  Title:

E-Mail:  Contact Phone:

**Figure 4. District Information – Main Page**

### Typing Hints

1. When you enter an address, always enter the state or province before entering the zip code. The zip will be checked for proper format for a US zip code if a US state was entered, or for a Canadian postal code if a Canadian province was entered. You may omit the hyphen in a 9-digit US zip code, or the space in the middle of a Canadian postal code. They will be inserted automatically.
2. You may enter a phone or fax number without any separation characters. If you enter *1234567890*, for example, it will be reformatted automatically to *(123) 456-7890*, whereas *1234567* will be reformatted to *123-4567*. If the number you enter does not have seven or ten digits, it will be left alone, exactly as you entered it, including any alphabetic or separation characters.
3. Frequently used names and numbers will be recognized in certain areas and you can tab to the next field if the name or number you want is displayed.

## Scheduling of Test Notices

Now click on the first Scheduling tab to display the next page of the district information screen (*Figure 5*). You should enter the cross-connection regulation, as this information appears in some of the letters. Hint: You should cite your own enforcement document, e. g. Resolution 3, City of Main.

Most of the information on this screen controls the scheduling of test notices. Note that the numbers are all relative to the start of the test month. So, for example, if an assembly is due to be tested in April, the initial test notice will be scheduled for printing on March 21<sup>st</sup> (ten days before April 1<sup>st</sup>), the first warning notice will be scheduled for May 1<sup>st</sup> (30 days after April 1<sup>st</sup>), the second warning notice will be scheduled for May 16<sup>th</sup> (45 days after April 1<sup>st</sup>), etc.

The numbers shown in *Figure 5* are the defaults, but you can change them. **To omit the third warning notice**, blank out the number shown. To omit both the second and third warning notices, blank out both numbers shown.

If you check the box to **send test report forms** with test notices, you will be able to print them from the Letters selection screen. You can also print individual test report forms from the customer information screen (see the section on *Assembly Information* in the Table of Contents).

Service District Information

District Name:

Main Page | **Scheduling - Test Notices** | Scheduling - Other Letters | System Options

Regulation Governing Program

Send scheduled test notice:  days before start of test month

Send test report forms with scheduled test notices

Time to 1st warning notice:  days after start of test month

Time to 2nd warning notice:  days after start of test month

Time to 3rd warning notice:  days after start of test month

Time to final shut-off notice:  days after start of test month

Note: To omit the 2nd and/or 3rd warning notices, leave those fields blank.

**Figure 5. District Information – Scheduling of Test Notices**

## Scheduling of Other Letters

Now click on the second Scheduling tab to display the next page of the district information screen (*Figure 6*). If you have checked the appropriate boxes, Cross-Track will automatically schedule:

- Residential questionnaires to be sent to new residential customers
- Thermal expansion letters to be sent following a site survey if the survey results indicate that premises isolation is required
- Internal protection reminder letters to be sent following the installation of a premises isolation assembly

You may **uncheck** any or all of these **boxes to eliminate the automated functions**, and you may also **change the automated repetition cycle** (number of years) for these letters or eliminate the repetition altogether. Remember these letters serve as important notifications and education to your customers, so carefully consider the effects of sending and periodically resending them to assist with liability issues.

You may also control the scheduling of these letters individually on the customer information screen (see the section *Surveys and Questionnaires* in the Table of Contents).

The screenshot shows a web application window titled "Service District Information". At the top, there is a text input field for "District Name" containing "City of Hamilton". Below this is a navigation bar with four tabs: "Main Page", "Scheduling - Test Notices", "Scheduling - Other Letters" (which is selected), and "System Options". The main content area is divided into three sections, each with a checked checkbox and a text input field for the number of years:

- RESIDENTIAL QUESTIONNAIRES**  
 Send questionnaires automatically to new residential customers  
Repeat questionnaires every  years
- THERMAL EXPANSION LETTERS**  
 Send thermal expansion letters automatically if premises isolation is required  
Repeat site surveys every  years
- INTERNAL PROTECTION REMINDER LETTERS**  
 Send internal protection letters automatically whenever premises isolation device is installed  
Repeat internal protection letters every  years

At the bottom of the content area, there is a note: "Note: To eliminated repeated letters, blank out the number of years." A "Close" button is located at the bottom right of the window.

**Figure 6. District Information – Scheduling of Other Letters**

## System Options

Now click on the System Options tab to display the next page of the district information screen (*Figure 7*). This screen allows you to select the method for generating letters. The default choice is to use mail merge documents, which you may customize. If you do not have Microsoft Word installed on your PC, you must use the built-in letters. They will generate faster than the mail merge documents, but you cannot customize them.

The second group of options applies to scheduled test notices, including all the warning notices. The default is to send **one letter per customer**, listing all the assemblies that are due for testing. The other option is to send **one letter per assembly**. This option applies only if you are using the customizable mail merge documents. You don't have a choice with the built-in Cross-Track letters; they will generate one letter per customer.

Finally, this screen shows you the **maximum number of customer accounts** that you may enter. If you wish to upgrade your program license to handle more accounts, click the "Upgrade License" button, and follow the instructions. There are three sizes of CT; up to 500 accounts, up to 3,000 accounts, and Unlimited customer accounts.

Service District Information

District Name:

Main Page | Scheduling - Test Notices | Scheduling - Other Letters | **System Options**

Generate letters using:

- Customizable Mail Merge Documents (requires MS Word)
- Built-in Cross-Track letters (non-customizable)

Max # of Customer Accounts:

For test notices to customers with multiple assemblies:

- Send one letter per customer, listing the assemblies
- Send one letter per assembly

**Figure 7. District Information – System Options**

# Regular Operation

## Customer Information

Click on the Customers button on the main menu to display the customer information screen (Figure 8). The main page includes basic information about the customer. The customer name and account number appear at the top of the screen. They are both required fields. The account number, which must be unique, may be in any desired format, with or without alphabetic or separator characters.

Make sure you enter the mailing address if you plan to send letters. If you leave the site address blank, it will be assumed to be the same as the mailing address. If you have customers with multiple sites, you can create multiple account records for them. Each record must have a unique account number, but the customer name and mailing address may be the same.

Note: If you enter an account contact name, that name will appear as an “Attn” line on mailing labels and letters.

Note: The drop down fields (down arrows) in Figure 8 will recognize typed information. When the field displays correctly you can tab to the next field to eliminate typing the entire word.

The screenshot shows a web application interface for customer information. At the top, there are two input fields: 'Customer:' with the value 'SMITH ENTERPRISES' and 'Account #:' with the value '123456.01'. Below this is a horizontal menu with tabs: 'Main Page' (selected), 'Surveys', 'List of Assemblies', 'Assembly Details', 'Test Schedules/Results', and 'Photos'. The main content area is divided into four sections: 'MAILING ADDRESS', 'SITE ADDRESS (if different from mail address)', 'ACCOUNT INFORMATION', and 'SITE INFORMATION'. Each section contains several input fields, some with dropdown menus for 'City', 'State/Province', and 'Acct Type'. At the bottom of the form are four buttons: 'Find Customer', 'New Customer', 'Delete Customer', and 'Close'. A status bar at the very bottom shows 'Record: 26 of 26', 'No Filter', and a search box.

**Figure 8. Customer Information – Main Page**

To search for a particular customer account record, click the “**Find Customer**” button at the bottom of the page. This will display a pop-up window prompting you to do a search by customer name, account number, mailing address, site address, or assembly serial number. The drop down menus at the end of each line also allow you to look at all the choices in each category.

On the customer information screen, you may also move from one record to another by using the arrow keys at the bottom of the screen.

To enter a **new customer** account record, click the “New Customer” button. This will clear the fields so that you can enter the new information. To **delete a record**, first display the record you want to delete, then click the “Delete Customer” button.

## Surveys and Questionnaires

The next tab on the customer information screen displays the surveys page (*Figure 9*).

Customer Information

Customer: ABC Construction Inc. Account #: 65400

Main Page Surveys List of Assemblies Assembly Details Test Schedules/Results Photos

**SITE SURVEY**

Survey Required  
Survey Notification Sent: 10/1/2007  
Survey Completed On: 10/25/2007

**SURVEY RESULTS**

Assemblies Required  
Type of Protection: Premises Isolation  
Survey Follow-up Sent: 11/8/2007  
Follow-up Inspection By: 1/20/2008

Survey Results for Follow-up Letter  
Pressure Vacuum breaker installed on irrigation system is low. This assembly must be raised at least one foot above the highest downstream piping or outlets.

**RESIDENTIAL QUESTIONNAIRE**

Questionnaire Required  
Initial Letter Sent:   
30-Day Follow-up Sent:   
 Response Received

Send Thermal Expansion Letter  
Thermal Letter Sent:   
 Send Internal Protection Reminder  
Reminder Letter Sent:

General Comments

Find Customer New Customer Delete Customer Close

Record: 15 of 684 No Filter Search

**Figure 9. Customer Information – Surveys**

To initiate a **residential questionnaire**, check the “Questionnaire Required” box. This will schedule the printing of a residential questionnaire letter. (This box may also be checked automatically for all new residential customers – see *Scheduling of Other Information* under the section entitled *District Information and Setup*).

When you receive the questionnaire response from the customer, check the “Response Received” box. A **residential questionnaire follow-up letter** will be scheduled for printing if a response has not been received within 30 days of the original letter.

To initiate a **site survey**, check the “Survey Required” box. This will schedule the printing of an initial site survey notice. Once the survey has been completed and the results obtained, enter the survey completion date in the space provided. Entering the date will cause a site survey follow-up letter to be scheduled for printing, depending on the results.

- If the survey results indicate that assemblies are not required at this time, there is nothing more to enter in this section. The “assemblies not required” version of the site survey follow-up letter will be scheduled for printing.
- If assemblies are required you must check the Assemblies Required box and fill in the remaining information – the type of protection required, the date for a follow-up survey, and a paragraph summarizing the survey results. The latter is especially important, because whatever text you enter in the “Survey Results for Follow Up” box will be included for the customer to read in the “assemblies required” version of the survey follow-up letter. The “General Comments” area is for your private notes and will not be included in any letters.

The remaining two check boxes on the survey page will schedule the printing of a **thermal expansion letter** and/or an **internal protection reminder letter**. The first of these letters explains the problems associated with thermal expansion, and the second is a reminder that premises isolation assemblies do not provide internal protection within the site.

If the corresponding automated functions are enabled, a thermal expansion letter will be scheduled automatically whenever the survey results are entered and the type of protection is set to “premises isolation”, and an internal protection reminder letter will be scheduled automatically whenever a new premises isolation assembly is installed. See *Scheduling of Other Information* under the section entitled *District Information and Setup*.

## Assembly Information

The “List of Assemblies” tab on the customer information screen displays a summary list of assemblies for this account (*Figure 10*). **To enter a new assembly** for this account, click the “New Assembly” button. The assembly details page will then be displayed with all the fields cleared to allow you to enter the new information. **To delete an assembly**, first put the cursor on the line you want to delete, then click the “Delete Assembly” button.

A **test report form** may also be **printed from this page**. To do so, put the cursor on the desired line and then click the Print Test Report Form button.

Double click to show details		
Serial #	Location	Next Test
▶ 55088	Behind main building, by tool shed	Jan 2008
551999	In pump room	Jan 2008

**Figure 10. Customer Information – List of Assemblies**

**To display additional information about an assembly**, either double click a line in the “List of Assemblies” tab, or click the “Assembly Details” tab. Either way, the assembly details page will be displayed (*Figure 11*).

You may use the large right and left arrow buttons (Record x of x) on the Assembly Details screen **to display the various assemblies** for this customer account if there is more than one assembly. You may also **add or delete assemblies** from this screen (and any of the other assembly screens).

For assemblies, the serial number and location are both required fields. The serial number must be unique for each customer account (different accounts can have the same assembly serial numbers). Note that the assembly location that you enter on this screen is included in test notices sent to customers, along with the assembly serial number. Make sure you enter enough information in the location field to easily identify the particular assembly. The “Comments” area is private for your notes and will not be included in any letters.

Customer Information

Customer: ABC Construction Inc. Account #: 65400

Main Page Surveys List of Assemblies **Assembly Details** Test Schedules/Results Photos

Serial #: 55088 Date Installed: 9/13/2001

Make: WATTS Isolation: Premises Isolation (Containment)

Model: 009 Hazard Level: Low Health Hazard

Size: .50 Test Interval: 12 Months

Type: RPBA

Location: Behind main building, by tool shed Map ID

Comments: This device was previously account number 65400-2

Record 1 of 2 New Assembly Delete Assembly

Find Customer New Customer Delete Customer Close

Record: 15 of 684 No Filter Search

**Figure 11. Customer Information – Assembly Details**

The “Test Schedules/Results” tab on the customer information screen allows you to **enter the results of an assembly test**, and also displays information about the **scheduling of test notices** and **past test history** (Figure 10). Whenever a test has been completed, you enter the test date, results, and the tester’s name in the first three fields of this screen. The next test will then be scheduled and shown in the “Next Test” field automatically after you move to any other screen (Record 2 of 2) or tab (Assembly Details) and then back to the Test Schedule tab.

Customer Information

Customer: ABC Construction Inc. Account #: 65400

Main Page Surveys List of Assemblies Assembly Details **Test Schedules/Results** Photos

**Enter Test Results**

Test Date:

Result:

Tester:

Serial #: 55088

Next Test: Jan 2008

Test Notes

**Scheduled Letters**  Stop Warning Letters

Test Required Letter: 12/22/2007  Sent?

1st Warning Notice: 1/31/2008  Sent?

2nd Warning Notice: 2/15/2008  Sent?

3rd Warning Notice: 3/1/2008  Sent?

Final Warning Notice: 3/16/2008  Sent?

**Test History**

Test Date	Result	Tester
2/8/2007	Passed	Bill Samuels
2/22/2006	Passed	Bill Samuels

Record 1 of 2

New Assembly Delete Assembly

Find Customer New Customer Delete Customer Close

Record: 14 of 15 of 684 No Filter Search

**Figure 12. Customer Information – Test Schedules/Results**

**Tests** are normally **scheduled** to occur **once every 12 months** on the anniversary month of the installation, even if the test is conducted late. If a test is conducted early, however, the schedule for subsequent tests will be pushed up. For example, suppose a test is scheduled for August 2008. If the test is not conducted until September 2008, the following test will still be scheduled for August 2009. If the test is conducted early, say in June 2008, then the next test will be scheduled for June 2009.

**Note:** If the next test date is wrong, you can change it on this screen. You should seldom if ever have to do this. Normally, you should allow the system to compute the next test date, which it will do automatically after you enter test results. A **test interval other than 12 months** can be set from the “Customer Information” section on the “Assembly Details” tab. Make sure you know what the requirements are before you change this interval.

The **schedule for the test and warning letters**, shown on this screen, is set automatically based on the next test month and the letter intervals **set in the district information screen**. Whenever a letter is printed, the *Sent?* box is checked automatically. If a letter is printed late, the subsequent letters are rescheduled to preserve the appropriate intervals between them. If you click the **“Stop Warning Letters”** box, no further warning letters will be sent *for this assembly*. Once a successful test is conducted, the stop warning letter box is automatically unchecked and the next test is scheduled. The Reports section has a report on all accounts with stop warning letters so you don't lose track.

### **Entering Dates**

Dates are entered using the format month/day/year, with either a 2- or 4-digit year. You must enter either a slash or hyphen as a separator character.

Examples:

4/1/09 or 04/01/09

4-1-2009

If you enter a 2-digit year, the date will be reformatted automatically to show a 4-digit year. If you omit the year altogether, the current year is assumed. Example:

4/1 is assumed to be 4/1/2009 if  
this is year 2009

The “Photos” page of the customer information screen is shown in *Figure 13*. If you want **to display a photo** of an assembly, you must first put (save) the image file (of type *bmp*, *jpg*, *gif*, *tif*, or *pcx*) into the Photos subfolder within the folder CT5 (on your C-drive unless you have a shared user installation -- see the section entitled *Installation Procedure*). Then you enter the name of the image file in this screen. You may click the Browse button to find the file name.

Once you have entered the file name for the photo, you may click the “Show Picture” button to display it. Photos are not displayed automatically so as not to slow the performance of your pc. There is one sample photo included in this folder.



**Figure 13. Customer Information – Photos**

## Letters

Click the “Letters” button on the main opening page menu to display the letter selection screen (Figure 14). This screen **shows** the number of **letters** that are **currently scheduled to be printed**. It also gives you an **option of printing letters only, mailing labels only, or both**.

The “due” column on this screen shows the number of *customers* who are due to receive letters. There is one exception: The number for test report forms shows the number of *assemblies* that are currently due to be tested. (This number will be zero if you have disabled the sending of test report forms with test notices – see *Scheduling of Test Notices, Figure 5*).

Due	Letter
0	Residential Questionnaire Letters
0	Residential Questionnaire Follow-Ups
0	Initial Site Survey Notices
0	Site Survey Follow-Ups (Asm Req)
0	Site Survey Follow-Ups (Asm Not Req)
0	Thermal Expansion Letters
0	Internal Protection Reminder Letters
-----	
2	Scheduled Test Notices
0	1st Warning Notices
1	2nd Warning Notices
0	3rd Warning Notices
0	Final Shut-Off Notices
0	Test Report Forms - Due for Testing Now
	Test Report Forms - Any or All Customers
	Cross Connection Questionnaire Form

Print Options

Print Letters and Labels  
 Print Letters Only  
 Print Labels Only

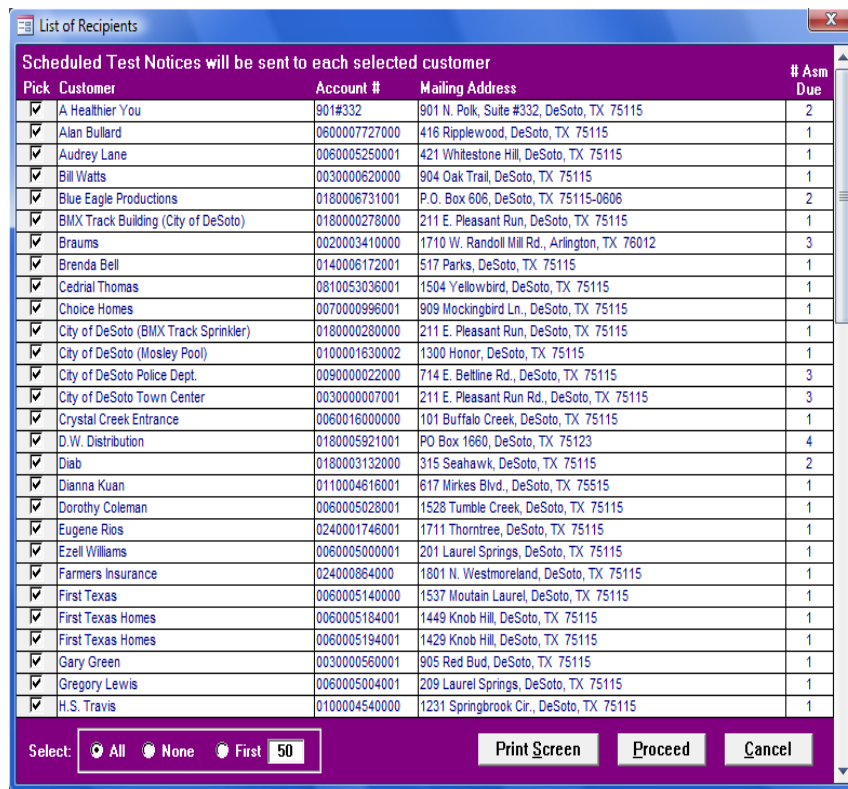
Print    Reset/Reprint    Close

**Figure 14. Letter Selection**

**To print a letter**, first select which of the three print options you want, then select the type of letter by clicking/highlighting it in the list, then click the “Print” button.

A screen will be displayed listing the customers who will receive the letters (*Figure 15*). The check boxes down the left-hand side allow you to control which letters are to be printed at this time. Buttons at the lower left of the screen will check or uncheck all of them, or check a batch (you can change the default number “50” to any number you want).

When you click the “Proceed” button on that screen, the checked letters will be printed and the current date will be recorded as the date sent.



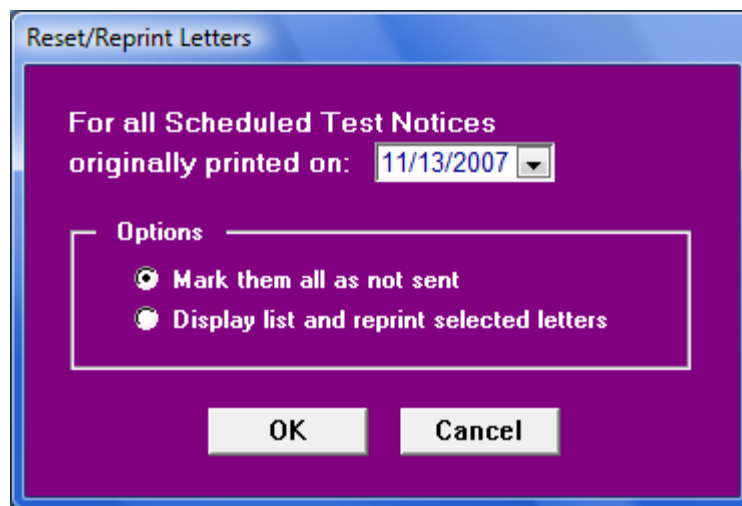
**Figure 15. List of Recipients**

Notes: Click the *Print Screen* button to print just the list as shown above to keep for your own records file.

Proceeding to print letters will automatically be sent to the default printer. To print labels it will pop up a box that allows you to load the label paper (standard 30 labels per page) and print from your choice of available printers.

Occasionally you may need to **reprint letters and/or mailing labels**. To do this, first select the type of letter on the letter selection screen (*Figure 14*), choose the print option you want (letters and labels, letters only, labels only) and then click the “Reset/Reprint” button. A pop-up window will be displayed (*Figure 16*) showing you the last dates that letters of this type were printed in the drop down menu. Select the date you want reset or reprinted.

The first option (mark them all as not sent) is appropriate if you need to **reprint the entire batch** and change the date they were printed. All of them will then show up as “due” on the letters selection screen. If you want to **reprint selected letters**, choose the second option, “Display List”. The list of recipients (*Figure 15*) will then be displayed for the original batch of letters, and you can check the ones you want to reprint.

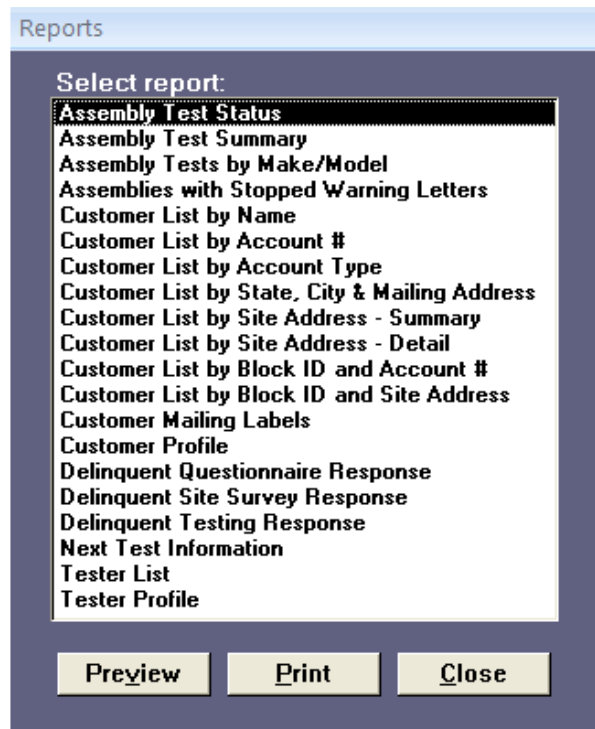


**Figure 16. Reprint/Reset Letters Popup Window**

## Reports

Click the “Reports” button on the main opening page menu to display the report selection screen (*Figure 17*). To **select a report**, click or highlight it on the list, then click either the “Preview” or “Print” button. The Preview button will display the report in printer format, with an option to print it or email it, whereas the Print button will print it directly.

A few of the reports will require a range of desired dates to be entered to generate the report, such as the Assembly Test Status, Summary, Tests by Make reports. A pop-up box will appear as a prompt to enter the starting and ending dates.



**Figure 17. Report Selection**

## Testers

Click the “Testers” button on the main opening page menu **to display the tester information** screen (*Figure 18*). The main Tester page includes basic information about the tester. The tester ID, which is required, must be unique. This ID should be their Tester certification number that they received from the certification agency, for example “B1234”.

**To search for a particular tester**, click the “Find” button at the bottom of the page. This will display a pop-up window prompting you to enter a tester name. On the tester information screen, you may also move from one record to another by using the arrow keys at the bottom of the screen.

You may need **to temporarily deactivate a tester** by changing the “Active” drop down field to “No”. This will retain all of the tester’s information but will not include this tester on the Tester Report Letter that is provided to the customer with their test due notices.

To enter a **new tester record**, click the “New Tester” button. This will clear the fields so that you can enter the new information. To **delete a record**, first display the record you want to delete, then click the “Delete Tester” button.

The remaining tabs on the tester information screen allow you to enter **additional information about the tester**, including certification, insurance, and gauge calibration.

The screenshot shows a web application window titled "Tester Information". At the top, there are two input fields: "Name: Tyrone J. Schnacker" and "Tester ID: 655321". Below these are four tabs: "Main Page", "Certification", "Insurance", and "Gauge Calibration". The "Main Page" tab is active. The form contains several fields: "Company: Backflow Management Inc.", "Address: 17752 NE San Rafael Street", "City: Portland", "State/Province: OR", "Zip: 97230", "Phone: (800) 841-7689", "Fax: (503) 255-1220", "E-Mail: bmi@bmibackflow.com", "Contact: Garrett or Mary", "Contact Phone: (503) 255-1619", "Cell/Pager:", "Active: Yes" (with a dropdown arrow), and "Comments:" (with a text area). There are radio buttons for "Tester" (selected) and "Contractor". At the bottom, there are four buttons: "Find", "New Tester", "Delete Tester", and "Close". A status bar at the very bottom shows "Record: 27 of 27", "No Filter", and a search box.

**Figure 18. Tester Information – Main Page**

## Customizing the Letters

The **customizable letters** are stored as mail merge document **templates** (.dot) files in the folder CT5, in the Letters subfolder on your C-drive (or on a shared drive if you have a shared usage installation). You may modify them using Microsoft Word, version 97 or later.

It is strongly recommended that you first make a backup copy of the Letters subfolder before you modify them, since there is no automated procedure to restore an original template.

Open a blank Microsoft Word document, go to the file drop down menu, select open and navigate to the Letters subfolder within the CT5 folder to select one of the Cross-Track letters that you want to modify. Notice that the letter opens with a “.dot” extension instead of the normal “.doc”. You can import your letterhead, change the wording and add or delete mail merge fields. After completing your changes, just close the letter and you will be prompted “do you want to save your changes?”. Select *yes* and it should retain the extension “.dot” and be saved back into the Letters subfolder under the same name. Do not use the “save as” option.

Three files are used as the data sources for the mail merge. Their file names are:

- Data Source1.txt – for scheduled test letters and warnings, and test report forms
- Data Source2.txt – for all other letters
- Data Source3.txt – for the questionnaire form

These three files will be found in the CT5 folder on your C- drive once you have generated some letters (even if you have a shared usage installation, the data source files for mail merge will be generated on *your* C-drive once you print any letter.)

Data Source1 and Data Source2 files also include data merge fields that are not currently used in the document templates. You may include any of the available fields when customizing the documents.

Data Source1, used for scheduled test letters and warning notices, includes 10 groups of fields for assembly information. This allows up to 10 assemblies to be listed in a letter. If a customer account has more than 10 assemblies due for testing in the same month, multiple letters will be printed for that account. Example: If twenty-three assemblies are due for testing, three letters will be printed, listing the first 10 assemblies, the second 10, and the last three.

The merge fields included in **Data Source1** are shown in *Table 1*. **Data Source2** has the same data merge fields as Data Source1, except that there is no assembly information, as noted.

**Data Source3** only has data merge fields for Service Address, District Address, District City, State and Zip, District Contact, Contact Title and Contact Phone.

### TIPS FOR ADDING DATA MERGE FIELDS:

When you have opened a letter to customize it, you may need to go to the “View” drop-down menu, select “Toolbars” and check “Mail Merge”. This will add a new row of options to use such as “View Merged Data”, to identify the fields if they do not show, or “Insert Merge Field” with a drop-down menu. Do not edit a merge field within the template, as you should only select a new merge field one from the toolbar or delete one that you don’t want.

<i>Category</i>	<i>Merge Field Name</i>	<i>Comments</i>
District Information	ServiceDistrict**	District Name
	DistrictContact**	
	ContactTitle**	
	ContactPhone**	
	Regulation	
Customer Information	CustomerName	
	AccountID	Account Number
	MAddress1	Mailing Address
	MAddress2	
	MCity	
	MState	
	MZip	
	SAddress1	Site Address
	SAddress2	
	SCity	
	SState	
	SZip	
	AcctType	Account Type
	Contact	Account Contact Name
	AttnLine	“ATTN: ” plus Account Contact Name
	Phone	Account Phone
	CellPhone	Account Cell Phone
Fax	Account Fax	
EMail	Account Email	
BlockID		
SiteContact	Site Contact Name	
Residential Questionnaires	ResQLetterSent	Date Letter Printed
	ResQFollowUpSent	Date Letter Printed
	ResQReceived	Yes/No

**Table 1. Merge Fields in Data Source1**

<i>Category</i>	<i>Merge Field Name</i>	<i>Comments</i>
Site Surveys	SurveyRequired	Yes/No
	SurveyLetterSent	Date Letter Printed
	SurveyComplete	Date Survey Completed
	AssemRqd	Assemblies Required (Yes/No)
	SurveyFollowUpSent	Date Letter Printed
	FollowUpDate	Date for Follow Up Inspection
	ReportNotes	For Follow Up Letter if Assem Req
	SendExpandLetter	Thermal Exp Letter (Yes/No)
	ExpandLetterSent	Date Letter Printed
Assembly Information	TestDue	Next Test Date (Month and Year)
(Data Source 1 only)	SerialNumber (x10)*	There are 10 of each of these fields, named SerialNumber, SerialNumber2, ..., SerialNumber10 Location, Location2, ..., Location10 Etc.
	Location (x10)*	
	AsmMake (x10)*	
	AsmModel (x10)*	
	AsmSize (x10)*	
	AsmType (x10)*	
	LastTestDate (x10)*	
	TesterName (x10)*	

**Table 1 continued Merge Fields in Data Source1**

Note:

\* indicates merge fields not available in Data Source2

\*\* indicates merge fields available in Data Source3. Two other merge fields are available in Data Source3: District Address and the District CSZ (City, State, Zip)

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