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XC2 User Manual

Getting Started

- **Using This Guide**
- **Using XC2's Knowledgebase**
- **How to Grant a Utility Employee Web Access**



How to Use This Guide Online

KB Asset ID: 3625

This page describes how to use this manual For Use Online

Finding the Guide Online

This guide can be found online at the following address

http://xc2help.net/ffxwb/?kbid=3500

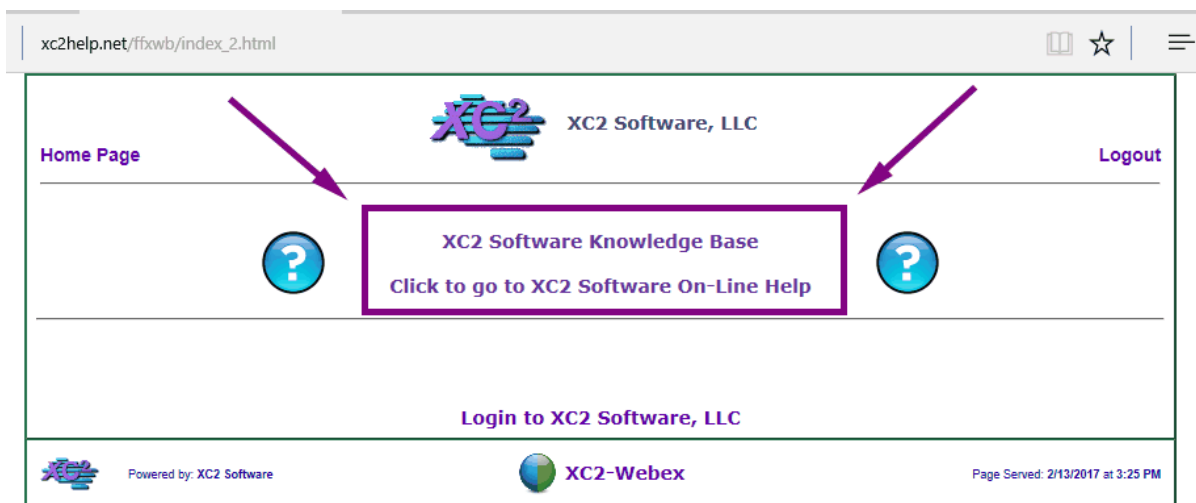
You may also perform a search for the guide.

1) Go to our knowlagebase

xc2help.net

2) Click the link to access our search page


XC2help.net




Notes:



Search

Perform a search for Users Manual



XC2 Software Knowledge Base



Search for: 

Select Type: 
Time Frame: 

Search Any Word Require All Words Search Complete Phrase Only

Found: 0 Page: 1 of 1

Select	Title	Status	KB ID	Module
--------	-------	--------	-------	--------

 Powered by: XC2 Software  XC2-Webex Page Served: 2/13/2017 at 3:35 PM

Notes:

Select the Users Manual

XC2 Software Knowledge Base

Search for: Select Type: Time Frame:


Found: 1 Page: 1 of 1

Select	Title	Status	KB ID	Module
<input type="checkbox"/>	XC2 BFP Users Manual 12/21/2016 Build: Type: How To Document This is our official users manual	FEATURE	3500	BFP

Powered by: XC2 Software Page Served: 2/13/2017 at 3:41 PM

Notes:


Online Guide



XC2 Software Knowledge Base

[Back To List](#)

Knowledgebase Search



Printer Friendly

KB Asset ID: 3500

XC2 BFP Users Manual
This is our official users manual

1 - Getting Started

This chapter describes how to use this manual and access our online knowledgebase.

Getting Started

2 - Start Using XC2

How to Login, How to Create New user accounts and other information necessary when opening XC2 for the First Time.

Start Using XC2

3 - Main Screen

The Main Screen is where it all starts.

From the Main Screen you have access to most of the powerful tools available in XC2. From searching to report generating, most features are a click or two away.

3 - Main Screen


How To Document

Notes:

Chapters


This Guide is divided into chapters.


To open a chapter, Click the link directly below the description of the chapter.



XC2 Software Knowledge Base

[Back To List](#)

Knowledgebase Search 



KB Asset ID: 3500

XC2 BFP Users Manual

This is our official users manual

[1 - Getting Started](#)

This chapter describes how to use this manual and access our online knowledgebase.

[Getting Started](#) ←

[2 - Start Using XC2](#)

How to Login, How to Create New user accounts and other information necessary when opening XC2 for the First Time.

[Start Using XC2](#)

[3 - Main Screen](#)

The Main Screen is where it all starts.

From the Main Screen you have access to most of the powerful tools available in XC2. From searching to report generating, most features are a click or two away.

[3 - Main Screen](#)


How To Document

Notes:

Chapter Topics

Each Chapter will have its own topics.


Click a topic to view the page



XC2 Software Knowledge Base

[Back To List](#)

Knowledgebase Search



KB Asset ID: 3546

1 - Getting Started


Chapter 1 - Getting Started

[Using This Guide](#)


[Using XC2's Knowledgebase](#)

[Back To Top of Page](#)

How To Document



Powered by: XC2 Software



Module: BFP
 Keywords: 3500 3546
 Created: 1/4/2017 Ian Saxton
 Modified: 2/13/2017 Ian Saxton


Page Served: 2/13/2017 at 3:30 PM

Notes:

Topic Page

Each Topic will have its own Web Page


Each Page has a description of the Topic with Screenshots directing "how to"



XC2 Software Knowledge Base

[Back To List](#)

Knowledgebase Search



KB Asset ID: 2038

How to Use XC2's Knowledge Base

Describes how to navigate the Knowledge Base and find useful pages

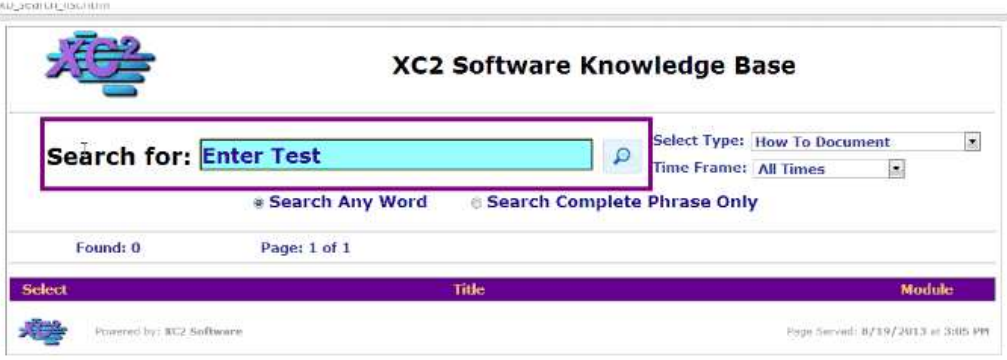
Key Words

XC2's Knowledge Base uses keywords to identify Knowledge Base pages. To search for Knowledge Base pages, type a keyword in the search bar that pertains to the topic you would like to explore.

For instance, if you would like to know how to enter a backflow test, type Enter Test as keywords then press search.

You should see every page related to the key words entered.

How To Document



The screenshot shows the search interface with 'Enter Test' entered in the search bar. Below the search bar are radio buttons for 'Search Any Word' and 'Search Complete Phrase Only'. The results section shows 'Found: 0' and 'Page: 1 of 1'. At the bottom, there is a table header with columns 'Select', 'Title', and 'Module'. The page footer includes 'Powered by: XC2 Software' and 'Page Served: 8/19/2013 at 3:05 PM'.

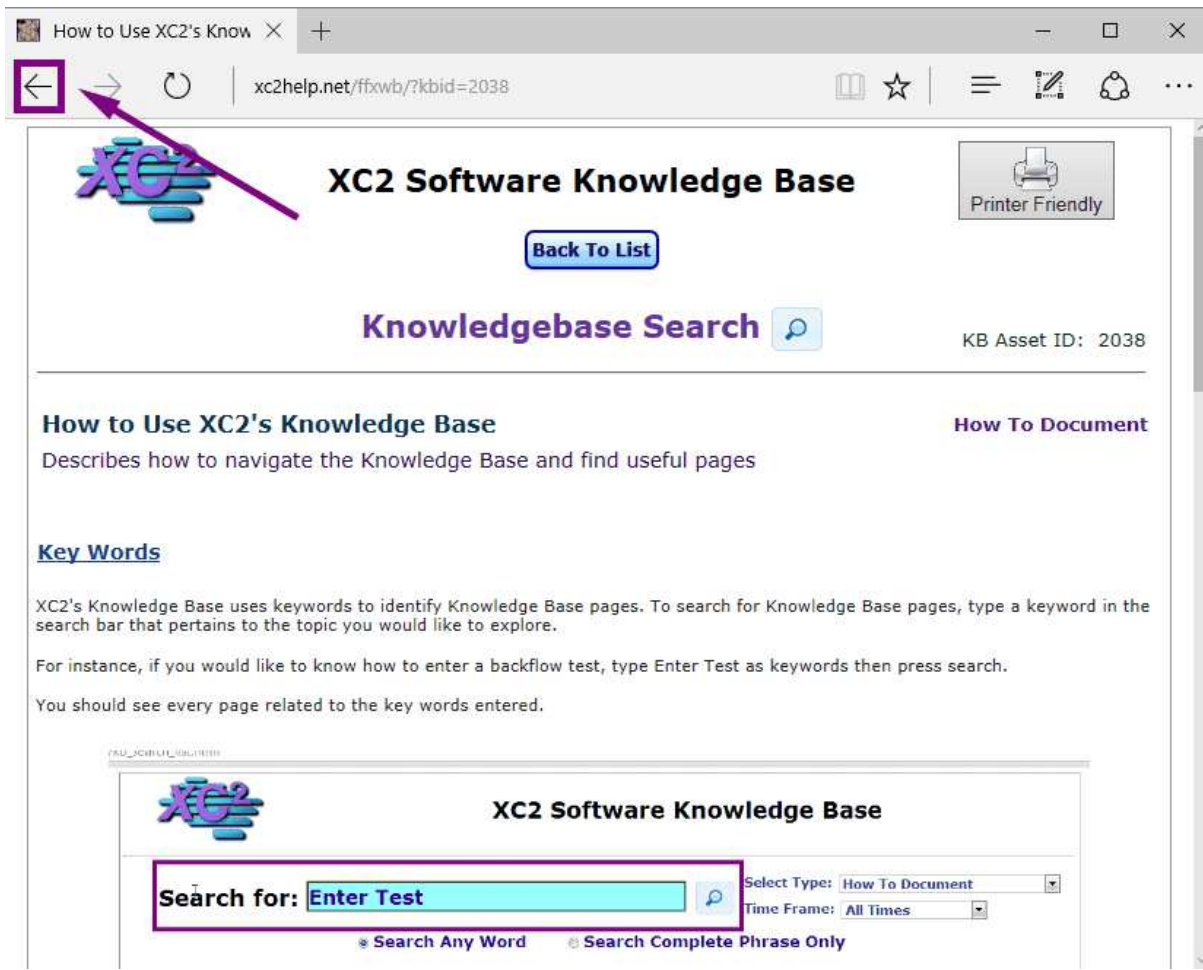
Search Results

Once you have found the page you were looking for, click on the link and the Knowledge Base page will open

Notes:

Getting Back to the Table of Contents

In your web browser, click the back button Twice



Notes:

You will be taken back to the table of contents

The screenshot shows a web browser window with the following elements:

- Browser tab: "XC2 BFP Users Manual"
- Address bar: "xc2help.net/ffxwb/?kbid=3500"
- Page header: "Back To List" button and "Knowledgebase Search" with a magnifying glass icon.
- Page metadata: "KB Asset ID: 3500"
- Section title: "XC2 BFP Users Manual" with a sub-link "How To Document".
- Text: "This is our official users manual"
- Section 1: "1 - Getting Started" with a sub-link "Getting Started". Text: "This chapter describes how to use this manual and access our online knowledgebase."
- Section 2: "2 - Start Using XC2" with a sub-link "Start Using XC2". Text: "How to Login, How to Create New user accounts and other information necessary when opening XC2 for the First Time."
- Section 3: "3 - Main Screen" with a sub-link "Main Screen". Text: "The Main Screen is where it all starts"

Notes:



XC2 Software Knowledge Base



How to Use XC2's Knowledge Base

KB Asset ID: 2038

Describes how to navigate the Knowledge Base and find useful pages

Key Words

XC2's Knowledge Base uses keywords to identify Knowledge Base pages. To search for Knowledge Base pages, type a keyword in the search bar that pertains to the topic you would like to explore.

For instance, if you would like to know how to enter a backflow test, type Enter Test as keywords then press search.

You should see every page related to the key words entered.

/KB_Search_0155111111

XC2 Software Knowledge Base

Search for:

Select Type:

Search Any Word
 Search Complete Phrase Only

Time Frame:

Found: 0
Page: 1 of 1

Select	Title	Module
	<small>Powered by: XC2 Software</small>	
Page Served: 8/19/2013 at 3:05 PM		

Notes:

Search Results

Once you have found the page you were looking for, click on the link and the Knowledge Base page will open

Search for:

Select Type:

Time Frame:

Search Any Word Search Complete Phrase Only

Found: 1 Page: 1 of 1

Select	Title	Module
<input type="checkbox"/>	How To Enter a Backflow Test - Main Screen	KB ID: 20 BFP
<input type="checkbox"/>	4/24/2013 Build: Type: How To Document	
	This Page will show you how to enter tests using XC2's Test Entry Screen	

Found: 1 Page: 1 of 1

Notes:

[Return to the search screen](#)

When you are done looking at the Knowledge Base page, click Knowledge Base Search to return back to the search menu.

XC2 Software Knowledge Base

[Back To List](#)

[Knowledgebase Search](#)

KB Asset ID: 20

How To Enter a Backflow Test - Main Screen

[How To Document](#)

This Page will show you how to enter tests using XC2's Test Entry Screen

Finding the Test Entry Screen

On the lower right portion of the screen press Enter Test

#	Facility Name	Addr (#)	Street	Site Qty	Sched Code	Next
1	29th Ave Liquor	4880	Beech Ridge		1	02-Feb
2	A & B Forest Fresh CO	4415	Ferguson		1	08-Aug
3	A Flag House	1583	Kim		1	09-Sep
4	A-Onest Electronics	5289	Preston Mill		1	04-Apr
5	Academy TV Service	7704	Quarter		1	11-Nov
6	Academy Veterinary Hospital	8350	Lighthouse		2	08-Aug
7	Advantage Brokers	5120	Webb		1	12-Dec
8	Bethesda At St Anthony Hospital North	1802	Woodcreek		3	07-Jul
9	Bilbos Overdue	21212	SPANISH OT			
10	Boulder Min Overcharge Claim Audit	7930	Mays		1	04-Apr
11	Children's Hospital	1552	Naples National		3	03-Mar
12	Echosphere Corporation	7210	West View		1	09-Sep
13	Hospital Shared Services Warehouse	5998	Buena Park		1	10-Oct
14	Hospitality Flowers & Gifts	6725	Sheridan		1	02-Feb

Notes:



XC2 Software Knowledge Base



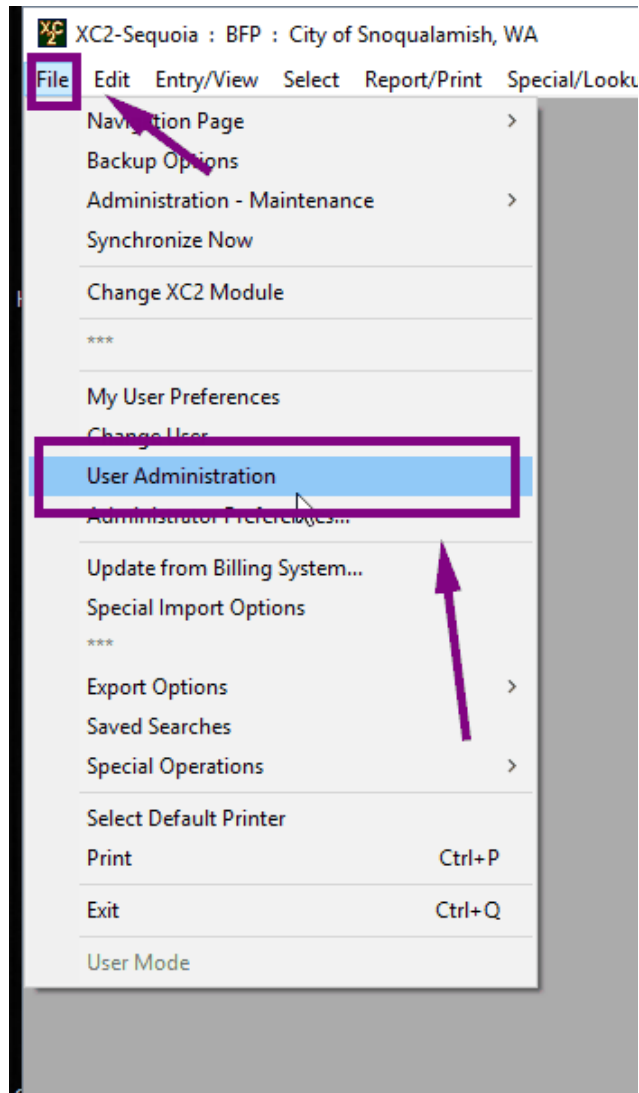
How To Grant a Utility Employee Web Access

KB Asset ID: 3626

This page describes how to give a current utility employee web access.

[Go To User Administration](#)

Go up to the file menu and select User Administration



Notes:

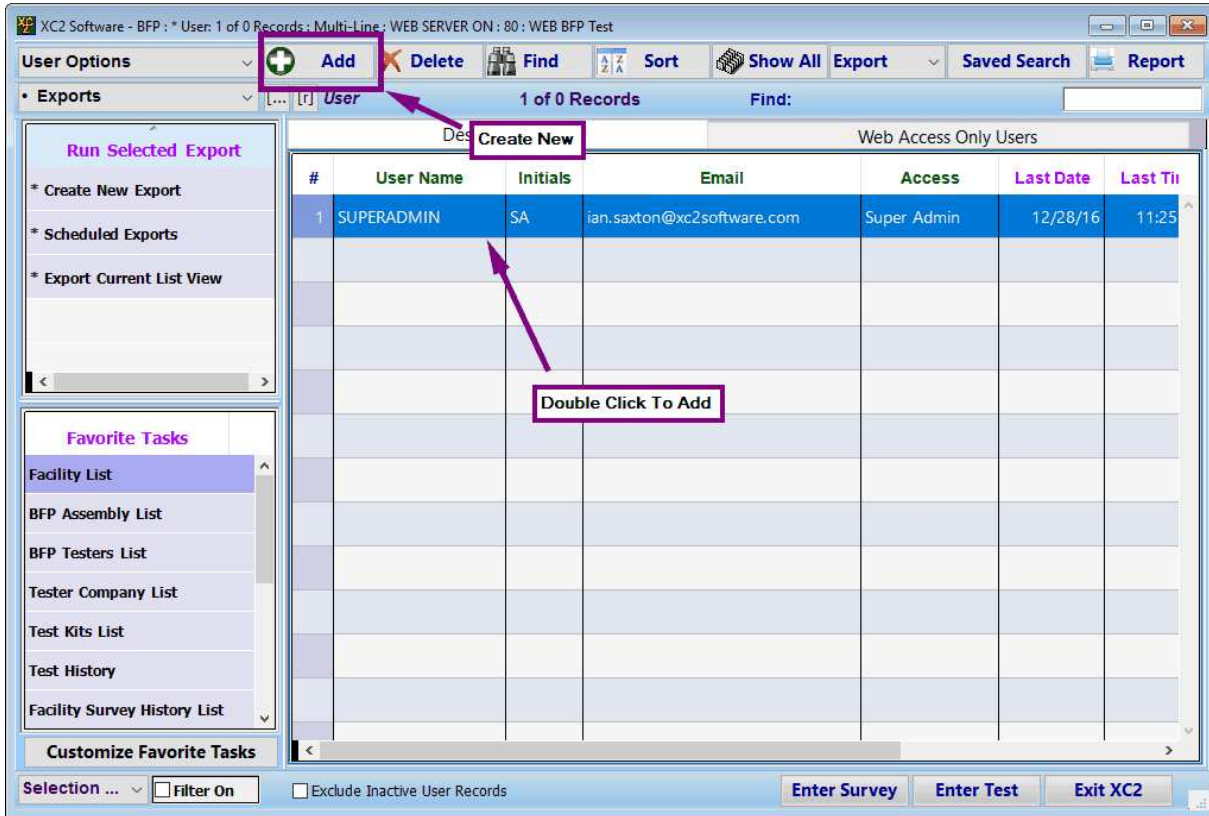
Create New or Edit Current

You can create a new account or you can edit a current existing account

Click New to Create a New account

or

Double Click a current account to add this feature



Notes:

Grant Access to Web

Click this box to grant Web access to the user

The screenshot shows the 'User Administration/Passwords' window for user 'SUPERADMIN'. The 'User Log On Name' is 'SUPERADMIN' and 'Initials/Code' is 'SA'. The 'User Log On Domain' is 'IANS-PC' and 'User Full Name' is 'IAN SAXTON'. The 'Access Level' is 'Super Admin'. The 'Email' is 'ian.saxton@xc2software.com'. The 'Phone' is '(555) 555-5555'. The 'Company Name' is 'ICABODS BACKFLOW 2' and 'Company ID' is '1-0000005'. The 'Tester/Personnel Name' is 'IAN SAXTON' and 'Tester/Personnel ID' is '100086'. The 'Grant Access To Utility Staff Web Entry' checkbox is checked and highlighted with a red box. A purple arrow points to this checkbox. The 'STAFF ONLY' section also includes 'Allow Access via ODBC (READ ONLY)'. The 'For Web Access by Contractors' section includes 'Web Access Setup' and 'Email User' buttons.

Notes:



XC2 Users Manual

Start Using XC2

- **How To Login to XC2**
- **How To Create New Users**
- **Adding Your Organization Information**
- **Adding Your Organization Logo and Letterhead**



XC2 Software Knowledge Base



How To Log Into XC2

KB Asset ID: 3512

User login

The Login Screen


The login Screen consists of several pieces of information that depending on logon requirements, are required to be filled out.

User Name (required)

Password (optional)


Password_Entry

Password Entry




Welcome to
XC2® Software
Please enter your user name
and your password

Wednesday, December 28, 2016

 User Name:

Password:

Default XC2 Module: ▼



City of Snoqualamish, WA

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 © 4D, SA 1985-2016

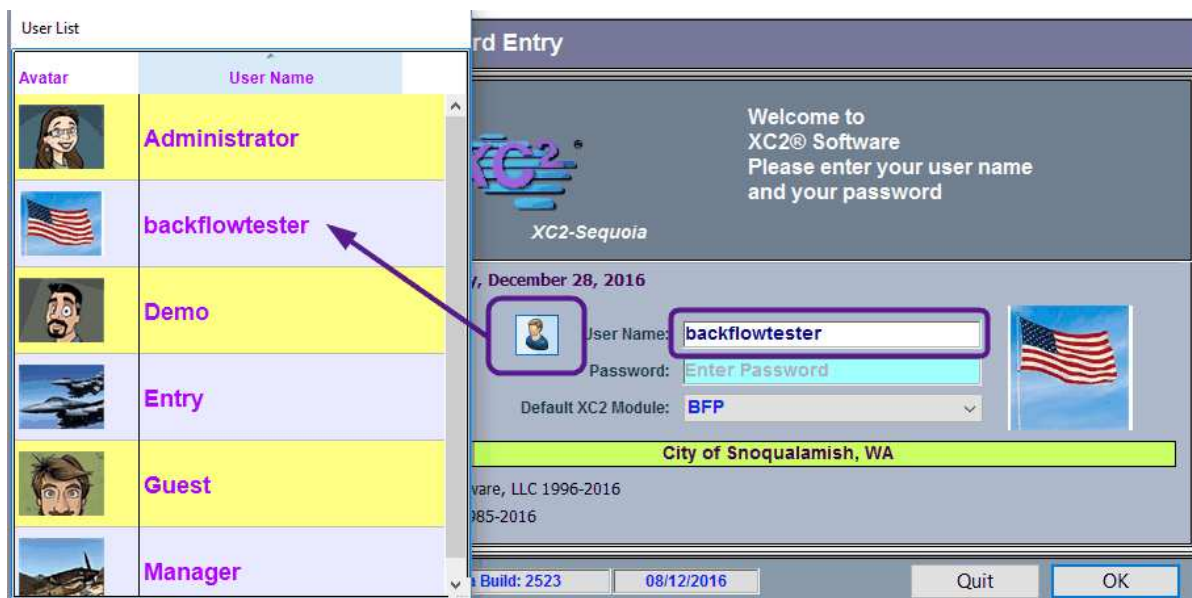
Sequoia Build: 2523
08/12/2016
Quit
OK

Notes:

Entering User or Account Name

There are a couple options when entering the user name

- Type in users name
- Click on the Avatar button to select user account




Notes:

Enter User Password (if required)

Click OK


Password_Entry

Password Entry

 **Welcome to XC2® Software**
Please enter your user name and your password

XC2-Sequoia

Wednesday, December 28, 2016

 User Name: 

Password:

Default XC2 Module:

City of Snoqualamish, WA

© XC2 Software, LLC 1996-2016
© 4D, SA 1985-2016

Sequoia Build: 2523 08/12/2016 Quit **OK**

Notes:



XC2 Software Knowledge Base



How to Create a new User Account or Change Existing User's Information

KB Asset ID: 33

This Page Describes How to setup a New User Account or Make Changes to an Existing Account

User Administration

Note: You need to be logged in with Super Administrator access level to make changes in this area. If you do not have Super Administrator access, you will not be able to create or edit User Accounts.

To create or change a user account, you need to access User Administration

- Scroll through Favorite Tasks list
- Double click User List

The screenshot shows the XC2 software interface. At the top, there's a title bar with the text "XC2 Software - SYNC-Master : DEMO: BFP : City of Denton, TX: * Facility: 914 of 914 Records : Multi-Line : SYNC STATUS ON : WEB SERVER ON : 80 : WEB BFP Test". Below the title bar is a menu bar with options: "User Options", "Add", "Delete", "Find", "Sort", "Show All", "Export", "Saved Search", and "Report".

The main area is divided into two panes. The left pane is titled "Special Functions" and contains a "Select Special Function" section with options like "Special Operations", "Update from Billing System (L)", "Display Records to Sync", "Display Remotes to Sync", "DataSync Setup", and "Auto DataSync Setup". Below this is a "Favorite Tasks" section with options like "Tester Company List", "Test Kits List", "Test History", "Facility Survey History List", "Notice Setup", "User List", and "Automatic Reminders". The "User List" option is highlighted with a mouse cursor, and a purple arrow points to it from the text below. At the bottom of the left pane is a "Customize Favorite Tasks" section.

The right pane is a table titled "Facility" showing 914 records. The table has columns: "#", "Facility Name", "Addr (#)", "Street", "Acct Number", and "Site Qt". The first 15 rows are visible, showing various facility names and addresses.

At the bottom of the interface, there are several buttons: "Selection ...", "Filter On", "Filter Facilities w/out Backflow", "Send Notice", "Enter Survey", "Enter Test", and "Exit XC2".

Notes:

User Accounts

To create a new account click the Add button.

The screenshot shows the 'User Accounts' window in XC2 Software. The title bar reads 'XC2 Software - BFP: * User: 6 of 9 Records: Multi-Line'. The 'User Options' menu is open, and the 'Add' button is highlighted with a red box. A red arrow points from the 'Add' button to the 'SUPER ADMIN' record in the table below. The table has columns for '#', 'User Log On Name', 'Initials', 'Access', 'Last Log Date', 'Last Log Time', 'Module', and 'ID'. The 'SUPER ADMIN' record is highlighted in black.

#	User Log On Name	Initials	Access	Last Log Date	Last Log Time	Module	ID
1	Designer	DES	Designer	03/14/2014	8:17 AM	BFP	
2	Administrator	ADM	Administrator	06/10/2013	8:09 AM	BFP	
3	Entry	ENT	Test Entry Only	08/29/2013	11:07 AM	BFP	
4	Guest	GUE	Guest	10/27/2009	3:33 PM	BFP	
5	SUPER ADMIN	SA	Super Admin	03/12/2014	1:11 PM	BFP	
6	Manager	MGR	Manager	06/10/2009	3:23 PM	BFP	10000

Notes:

Personalize The Account

Enter the information for:

- User Login Name
- Access Level

If you would like to set the login password yourself

- Click the password Button on the top right corner

The screenshot shows the 'User Administration/Passwords' form in the XC2 Software interface. The form is titled 'User Administration/Passwords' and contains the following fields and buttons:

- Required (*)** section:
- User Log On Name (*)**: BRAND NEW USER
- Initials/Code (*)**: BNU
- User Full Name**: BRAND NEW USER
- Access Level**: Entry
- Allow Access via ODBC (READ ONLY)**:
- Personnel ID:** 100007
- User ID:** 100007
- Password** button (highlighted with a purple arrow)
- Personnel Record** button
- Phone**: [Empty]
- Email**: [Empty]
- Employee Num**: [Empty]
- Computer Name**: TECH-CURRENT
- Computer Log On**: [Empty]
- Last Log On**: 00/00/00 12:00 AM
- Password Expiration Date**: [Empty]
- Default XC2Module**: BFP
- Options:**
 - Don't Test for Backup on Exit
 - Sort Field Names - Alphabetically
 - Auto Format Text
 - Test Lookup - Enter Test Directly After Lookup
 - Always Show "New" and "All" Buttons in Query Editor

The form also includes a status bar at the bottom with the text 'User - LG - 01' and buttons for 'New Record', 'Search', 'Report/Print', 'Cancel', and 'Save'.

Notes:

New User

After you save the record, a new User will appear in the list.

The screenshot shows the 'User' management window in XC2 Software. The window title is 'XC2 Software - BFP : * User: 6 of 8 Records : Multi-Line : FILTER ON'. The main area displays a table of users, with a purple arrow pointing to the 6th record, 'New XC2 User'.

#	User Name	Initials	Email	Access	Last Date	Last Time	I
1	Administrator	ADM		Administrator	08/20/98	7:25 AM	
2	Entry	ENT		Entry		12:00 AM	
3	Guest	GUE		Guest	10/20/99	1:29 PM	
4	Demo	DEMO		Super Admin	11/11/14	10:10 AM	
5	Manager	MGR		Manager	01/07/99	9:05 AM	
6	New XC2 User	NXC2	xc2user@snoqualamish.com	Administrator		12:00 AM	
7	SUPER ADMIN	SA		Super Admin	04/06/12	4:04 PM	

The interface includes a left sidebar with navigation options like 'Facility List', 'BFP Assembly List', 'Tester List', etc. The top toolbar contains actions like 'Add', 'Delete', 'Find', 'Sort', 'Show All', 'Export', 'Saved Search', and 'Report'. At the bottom, there are checkboxes for 'Filter On' and 'Exclude Inactive User Records', along with buttons for 'Send Notice', 'Enter Survey', 'Enter Test', and 'Exit XC2'.

Notes:

Make Changes to the Account

If at any point you would like to make changes to an Account, double click on a record you would like to change, then edit the field you would like to change.

The screenshot shows the 'User Administration/Passwords' form for a new user. The form is titled 'XC2 Software - BFP : New XC2 User : NXC2 : Administrator : 6 of 7 Selected'. It features a top navigation bar with buttons for 'Home Page Buttons', 'Email/PDF Prefs', 'BFP Screen Sets', 'Web Access', and 'Access_History'. Below this is a sub-navigation bar with 'User Info', 'Startup Prefs', 'User Task Access Rights', 'XC2 Module Access', 'Table Access Rights', and 'List View Prefs'. The main form area is divided into several sections:

- User Information:** Includes fields for 'User Log On Name (*)' (New XC2 User), 'Initials/Code (*)' (NXC2), 'User Full Name' (New XC2 User), 'Access Level' (Administrator), 'Phone', and 'Email' (xc2user@snoqualamish.com).
- Access Rights:** Includes checkboxes for 'Allow Access via ODBC (READ ONLY)' and 'Allow To Enter BFP Test Results via Web'.
- System Settings:** Includes fields for 'Employee Num', 'Computer Name' (TECH-CURRENT), 'Computer Log On', and 'Last Log On' (00/00/00 12:00 AM).
- Options:** Includes checkboxes for 'Don't Test for Backup on Exit', 'Sort Field Names - Alphabetically', 'Auto Format Text', 'Test Lookup - Enter Test Directly After Lookup', and 'Always Show "New" and "All" Buttons in Query Editor'.
- Default Module:** A dropdown menu set to 'BFP'.
- Password Management:** Includes buttons for 'Password', 'Send New Password via Email', 'Email Signature', and 'Personnel Record', along with a 'Password Expiration Date' field.
- Web Access:** Includes a section for 'For Web Access by Contractors: Click Here:' with a 'Web Access Setup' button.
- Background Tasks:** Includes a section for 'Servant - Client - Performs Background Tasks, e.g Email' with a checkbox for 'Servant Client - Background Tasks' and a 'Servant Machine Name' field.

The bottom of the form features a status bar with 'User.02_LG.1' and '00-0000005', and navigation buttons for 'New', 'Search', 'Print', and 'Save'.

Notes:



XC2 Software Knowledge Base



Your Business Information

KB Asset ID: 2613

This is the area in XC2 to fill in much of your business information.

Once entered here, the information will also be available to insert into your letters by the use of a merge field.

Administrators Setup

From the main screen,

- Click Administrators Setup

The screenshot shows the XC2 software interface with a list of 21 facilities. The left sidebar contains a menu with 'Administrator Setup' highlighted. The main window displays a table with the following data:

#	Facility Name	Addr (#)	Street	Site Qty	Sched Code	Next Survey Date	Last Survey Date	Acct Number	ility H2C
1	29th Ave Liquor	4880	Beech Ridge	1	02-Feb	10/12/2011	10/12/2004	16625-000	
2	A & B Forest Fresh CO	4415	Ferguson	1	08-Aug	08/03/2011	08/03/2006	16891-000	
3	A Flag House	1583	Kim	1	09-Sep	12/09/2002	12/09/2002	9315-000	
4	A-Quest Electronics	5289	Preston Mill	1	04-Apr	08/22/2011	08/22/2004	20089-000	
5	Academy T V Service	7704	Quarter	1	11-Nov	11/29/2016	11/29/2011	11398-000	
6	Academy Veterinary Hospital	8350	Lighthouse	2	08-Aug	08/14/2011	08/14/2004		
7	Advantage Brokers	5120	Webb	1	12-Dec	09/09/2002	09/09/2002	13335-000	
8	Bethesda At St Anthony Hospital Nort	1802	Woodcreek	3	07-Jul	02/21/2013	02/21/2008		
9	Bill's Balloon Bonanza	1111	Hellum			04/03/2015	04/03/2014		
10	Boulder Mtn Overcharge Claim Audit	7930	Mays	1	04-Apr		04/13/2003	14394-000	
11	Children's Hospital	1552	Naples National	7	03-Mar	11/06/2012	11/06/2007		
12	Echosphere Corporation	7210	West View	1	09-Sep	09/22/2011	09/22/2006		
13	Greg's House of Pancakes	1435	El Monte						
14	Hospital Shared Services Warehouse	5998	Buena Park	1	10-Oct	01/26/2012	01/26/2007		
15	Hospitality Flowers & Gifts	6725	Sheridan	1	02-Feb	02/28/2011	02/07/2003		
16	Hospitality Group Inc The	429	Cal Glen	1	10-Oct	03/28/2013	03/28/2008		
17	LA Salle Partners	5622	Sterling Glen	1	02-Feb	03/06/2013	03/06/2008	8087-000	
18	Labford Machine	1577	Meadow Ash	1	01-Jan	04/10/2011	04/10/2006	11884-000	
19	Lakewood Family Medical Clinic Pc	7846	Champions	1	01-Jan	12/21/2015	12/21/2010	22782-000	
20	Lamar Ventures	2941	Adara	1	12-Dec	03/02/2014	03/02/2009	9122-000	
21	Lanyon Sprinkler CO	4709	Prairie Run	2	06-Jun	12/21/2015	12/21/2010	19897-000	

Notes:

Adding Your Organizational Information

Once the main organization page opens, enter the information for your company.

Administrator Preferences

Table Names/Dflts | Custom Fields | List Column Setup | Update from CIS Setup | BFP Test Import | Universal Defaults

Business Info | Default Activity Codes | Data Entry Prefs | Activity Entry | System IDs | Test Criteria

XC2® Licensed To: **City of Snoqualamish, WA** **BFP**

Program Name: Backflow Prevention Program

Supervisor Name: Robert Mum **Title:** Cross Connection Control Super

Supervisor Certification #: [Empty]

Supervisor Certification Info: [Empty]

Default City/ST/Zip: Snoqualamish Wa 98215

Area Code: 206 Use Default City/ST/Zip for New Address Entries

Phone: (206) 555-1213 **FAX:** (206) 555-2121

County: Snoqualamish **Sales Tax Pct:** 8.300%

Mailing Address (Include Organization Name):
City of Snoqualamish
1345 Washougal Blv.
Snoqualamish, WA 98215

Default Return Email: [Empty] Use: User Email

Internal Program Email: [Empty] Use: Program Email (Left)

No Reply Email: [Empty]

XC2 Registration | Logo/Letter Prefs | Startup Index Builder | QuickSearchSetup | Terminology | PWS ID: [Empty] | Organization Type: WP - Water Purve... | Index Reb... | Execute

DataSynch Setup | DataSynch Prefs | List Box Demo

Remote DB ID: [Yellow Highlight] | Cancel | Done

Notes:



XC2 Software Knowledge Base



How to enter your organizations logo and or Letterhead into XC2 FOG

KB Asset ID: 2859

This page describes how to enter your organizations logo and or letterhead into XC2 FOG

Administrators Setup

You can enter your Organizations Logo in Administrators Setup

Click Administrators Setup on the main page

Note: You need super administrator access to make changes in this area

#	Facility Name	Addr (#)	Street	Generator Type	Size	Type	Next Inspection	Last I
1	Golden Pantry	3192	Orchard	Bakery	15	HGI	12/10/03	
2	New China	9162	Interlache	Full Service Restaurant	10	HGI	10/09/04	
3	Uncle Roman's Rib House	4145	Mohawk	Full Service Restaurant	500	HGI	09/18/04	
4	Papa John's Usa	3188	Creekside	Fast Food	1000	GGI	11/18/04	
5	Riverside Healthcare Center	5100	Sunset	Rehab Center	30	HGI	08/22/04	
6	Riverside Healthcare Center	5100	Sunset	Rehab Center	500	GGI	08/22/04	
7	Riverside Healthcare Center	5100	Sunset	Rehab Center	1000	GGI	08/22/04	
8	Newton Early Childhood Center	4142	Picardy	School	1500	GGI	04/16/07	
9	Sharp Middle School	6866	Rossmore	School	30	HGI	01/07/04	
10	Little Angels Day Care	8151	Woodridge	Day Care Center	1000	GGI	07/30/04	
11	Chick-N-Run	30	Broadway	Fast Food	1000	GGI	11/17/04	
12	Newton CO Rec Dept		Sarin	School	1000	GGI	09/28/03	

Notes:

Business Info Tab

Under Business Info

Click Logo/Letter Prefs

The screenshot shows the 'Administrator Preferences' window with the 'Business Info' tab selected. The window title is 'Administrator Preferences'. The tabs include: Table Names/Diffs, Custom Fields, List Column Setup, Update from CIS Setup, Universal Defaults, Business Info (selected), Default Activity Codes, Data Entry Prefs, Activity Entry, and System IDs. The main content area is titled 'City of Snoqualamish, WA' and contains the following fields:

- XC2® Licensed To:** (highlighted with a purple box)
- Program Name:** FOG Program
- Organization:** WP - Water Purveyor
- Supervisor Name:** Sue Atkinson
- Supervisor Certification #:** (empty)
- Supervisor Certification Info:** (empty)
- Default City/ST/Zip:** (empty)
- Area Code:** (empty)
- Phone:** (209) 555-1212
- FAX:** (209) 555-3333
- County:** (empty)
- Sales Tax Pct:** .000%
- Mailing Address (Include Organization Name):**
City of Snoqualamish
Water Department
1345 Washougal Blvd.
Smoqualamish, WA 98215
- Default Return Email:** (empty)
- Internal Program Email:** (empty)
- No Reply Email:** (empty)
- Use: User Email:** (selected)
- Use: Program Email (Left):** (unselected)

At the bottom, there is a row of buttons: XC2 Registration, Logo/Letter Prefs (highlighted with a purple box), Startup Index Builder, QuickSearchSetup, Index Rebuild, DataSynch Setup, DataSynch Prefs, List Box Demo, Terminology, and Execute. Below the buttons is a 'Remote DB ID:' field with a yellow background. At the bottom right are 'Cancel' and 'Done' buttons.

Notes:

Logo/Letter Prefs: Adding Logo

The top portion of Logo/Letter Prefs is for your Logo

Click Load From Document then select your logo.

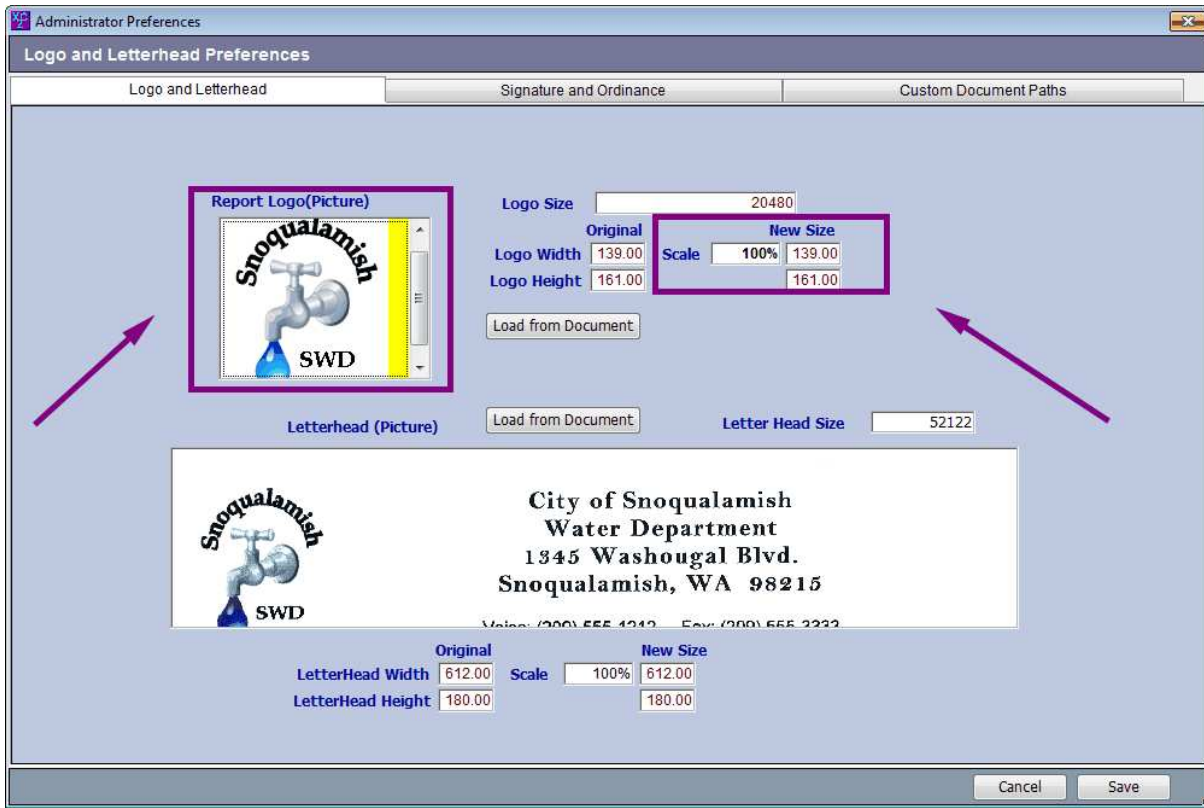


Notes:

Change Size of Logo

The logo should fit inside of the designated square. If you need to change the size, you may adjust the scale by adjusting the percentage

Click Save when you are finished

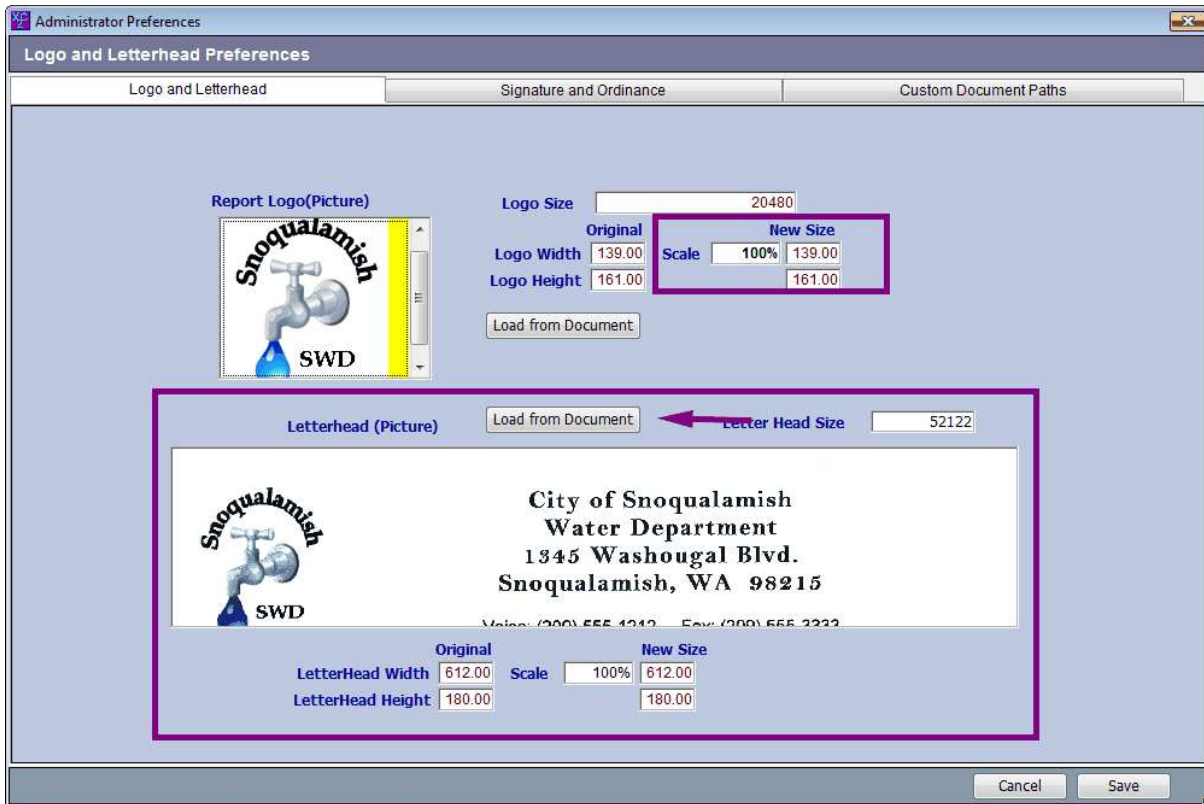


Notes:

Logo Letter Prefs: Letterhead

The Letterhead portion is located on the bottom of the screen

Click Load from document to add your letterhead.



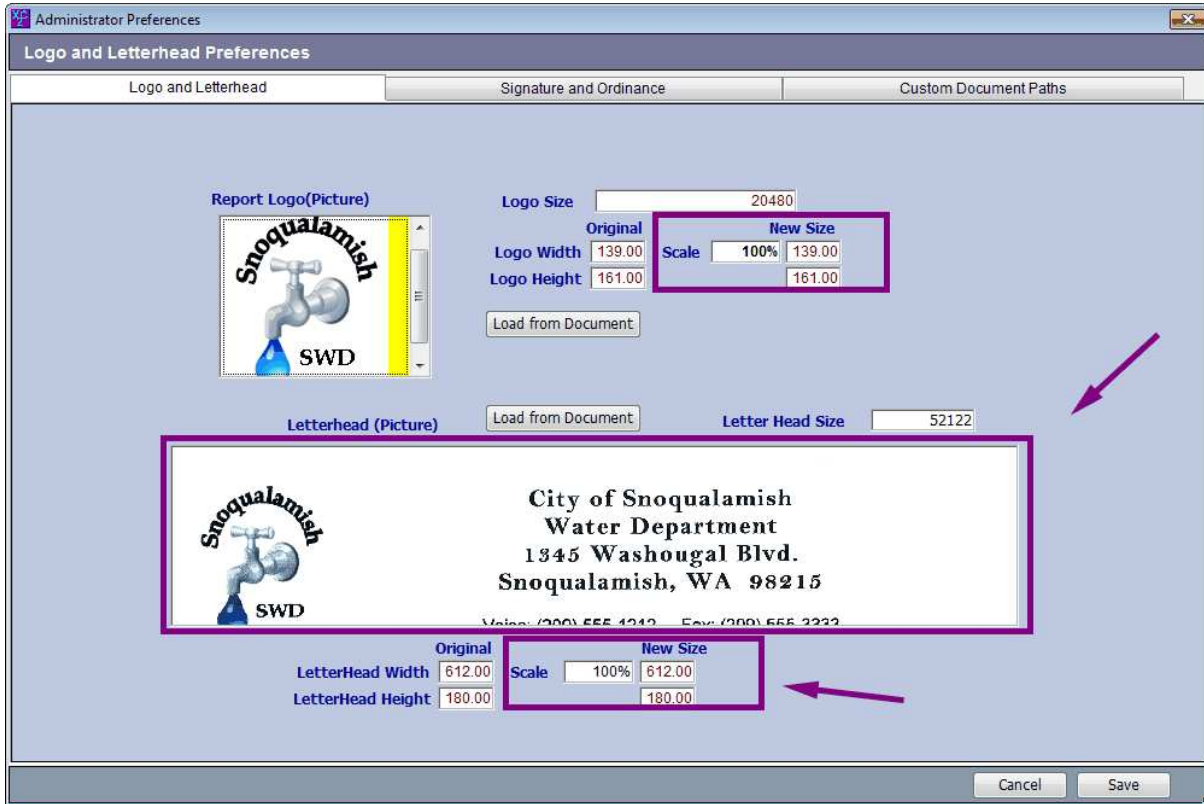
Notes:

Adjust the size

The letterhead should fit in the designated space. If you need to adjust the scale, you may do so just below the designated space.

Important: When uploading your letterhead, only load the portion of the letterhead that has your organizations information. **Do not upload a file that is the size of a full sheet of paper.**

Click Save when you are done



Notes:



XC2 User Manual

The Main Screen

- **What Is The Main Screen?**
- **Main Screen Overview**
- **Where Are You**
- **Setting the Main Screen As Your Default**
- **Resizing and Moving the Main Screen**
- **Auto Adjust and Auto Maximize**
- **Facility vs Assembly**
- **If the Main Screen Closes**
- **Sorting and Creating Subsets**



XC2 Software Knowledge Base



What is the main Screen

KB Asset ID: 3504

This page serves as an introduction to XC2's Main Screen

XC2's Main Screen

This is XC2's Main Screen

This is your main navigation tool that you will use to navigate your data.

In this section we will go over how to use this page and the features that are available

The screenshot shows the XC2 software interface with the following components:

- Header:** "XC2 Software - BFP : City of Snoqualamish, WA: * Facility: 92 of 92 Records : Multi-Line : WEB SERVER ON : 80 : WEB BFP Test"
- Toolbar:** Add, Delete, Find, Sort, Show All, Export, Saved Search, Report
- Quick Lookups:** Facility (92 of 92 Records), Find: Facility Name
- Left Panel:**
 - Run Selected Lookup:** Automatic Reminders, Overdue Notices, Overdue Tests, Failed Assemblies, Unprinted Test Report Results, Tests Due Lookup
 - Favorite Tasks:** Facility List, BFP Assembly List, BFP Testers List, Tester Company List, Test Kits List, Test History, Facility Survey History List
 - Customize Favorite Tasks:** (Empty)
- Main Table:**

#	Facility Name	Addr (#)	Street	Site Qty	Sched Code	Next
53	OMELET HOUSE RESTAURANT ---CHANGE	709	WALLACE	1	07-Jul	
54	OPUS ONE DESIGNS	3166	GUARD-WELL	1	09-Sep	
55	PACIFIC JEWELRY & LOAN CO - CHANGESSS	2566	MAIN	1	03-Mar	
56	PARK MAYFAIR HOME OWNERS ASSOC --- CHAN	6931	MEADOW BEND	1	07-Jul	
57	QUALITY SURFACE OF METRO SNOQUALAMISH	7359	SEAY	1	03-Mar	
58	R L PLIMPTON ASSOC INC	7480	LAKEHURST	2	09-Sep	
59	RAINBOW REBUILDERS	6694	ABBOTSFORD	7	01-Jan	
60	RAINS-FLO PACKINGS	5102	CLARK-SHAW	1	01-Jan	
61	REAL PROPERTY VALUATIONS INC	9089	LINKSWAY	1	10-Oct	
62	REDDING EQUIPMENT CO	2230	VINMAR	1	10-Oct	
63	RESOLUTION TRUST CORP	1905	HILLYER	1	08-Aug	
64	RILEY INCOME TAX SERVICE	1710	LIBERTY	1	01-Jan	
65	SEARS J L & ASSOCIATES REAL ESTATE	7323	FAIRWAY	1	08-Aug	
66	SEARS J L & ASSOCIATES REAL ESTATE - CHAN	7323	FAIRWAY		08-Aug	
67	SENIORS IN COMMUNITY LIVING INC	8005	GREYSON	2	05-May	
				118		
- Footer:** Selection ... Filter On Filter Facilities w/out Backflow

Notes:



XC2 Software Knowledge Base



Main Page Features

KB Asset ID: 2594

XC2's Main Page was designed to make everyday tasks in XC2 easier to access and quicker to navigate by making some of the most used features in XC2 available on one page.

List View

This is your main viewing area for all records.

Here you can view records as a list

#	Facility Name	Addr (#)	Street	Site Qty	Sched Code	Next
53	OMELET HOUSE RESTAURANT ---CHANGE	709	WALLACE	1	07-Jul	
54	OPUS ONE DESIGNS	3166	GUARD-WELL	1	09-Sep	
55	PACIFIC JEWELRY & LOAN CO - CHANGESSS	2566	MAIN	1	03-Mar	
56	PARK MAYFAIR HOME OWNERS ASSOC --- CHAN	6931	MEADOW BEND	1	07-Jul	
57	QUALITY SURFACE OF METRO SNOQUALAMISH	7359	SEAY	1	03-Mar	
58	R L PLIMPTON ASSOC INC	7480	LAKEHURST	2	09-Sep	
59	RAINBOW REBUILDERS	6694	ABBOTSFORD	7	01-Jan	
60	RAINS-FLO PACKINGS	5102	CLARK-SHAW	1	01-Jan	
61	REAL PROPERTY VALUATIONS INC	9089	LINKSWAY	1	10-Oct	
62	REDDING EQUIPMENT CO	2230	VINMAR	1	10-Oct	
63	RESOLUTION TRUST CORP	1905	HILLYER	1	08-Aug	
64	RILEY INCOME TAX SERVICE	1710	LIBERTY	1	01-Jan	
65	SEARS J L & ASSOCIATES REAL ESTATE	7323	FAIRWAY	1	08-Aug	
66	SEARS J L & ASSOCIATES REAL ESTATE - CHAN	7323	FAIRWAY		08-Aug	
67	SENIORS IN COMMUNITY LIVING INC	8005	GREYSON	2	05-May	
				118		

Notes:

Tool Bar

The Tool Bar Located Above the List View gives the users many options to help manage your list of records

- Create New Records
- Manage Records
- Search For Records
- Display All Records
- Export Records

The screenshot displays the XC2 Software interface for the City of Snoqualamish, WA. The window title is "XC2 Software - BFP : City of Snoqualamish, WA - Facility: 92 of 92 Records - Multi-Line - WEB SERVER ON : 80 - WEB BFP Test". The interface includes a tool bar at the top with buttons for Add, Delete, Find, Sort, Show All, Export, Saved Search, and Report. Below the tool bar is a search bar with the text "Find: Facility Name" and a dropdown menu for "Facility". The main area shows a table of 92 records, with the following data visible:

#	Facility Name	Addr (#)	Street	Site Qty	Sched Code	Next
53	OMELET HOUSE RESTAURANT ...CHANGE	709	WALLACE	1	07-Jul	
54	OPUS ONE DESIGNS	3166	GUARD-WELL	1	09-Sep	
55	PACIFIC JEWELRY & LOAN CO - CHANGESSS	2566	MAIN	1	03-Mar	
56	PARK MAYFAIR HOME OWNERS ASSOC ... CHAN	6931	MEADOW BEND	1	07-Jul	
57	QUALITY SURFACE OF METRO SNOQUALAMISH	7359	SEAY	1	03-Mar	
58	R L PLIMPTON ASSOC INC	7480	LAKEHURST	2	09-Sep	
59	RAINBOW REBUILDERS	6694	ABBOTSFORD	7	01-Jan	
60	RAINS-FLO PACKINGS	5102	CLARK-SHAW	1	01-Jan	
61	REAL PROPERTY VALUATIONS INC	9089	LINKSWAY	1	10-Oct	
62	REDDING EQUIPMENT CO	2230	VINMAR	1	10-Oct	
63	RESOLUTION TRUST CORP	1905	HILLYER	1	08-Aug	
64	RILEY INCOME TAX SERVICE	1710	LIBERTY	1	01-Jan	
65	SEARS J L & ASSOCIATES REAL ESTATE	7323	FAIRWAY	1	08-Aug	
66	SEARS J L & ASSOCIATES REAL ESTATE - CHAN	7323	FAIRWAY		08-Aug	
67	SENIORS IN COMMUNITY LIVING INC	9095	GREYSON	2	05-May	
68	SHERIDAN SANITATION DISTRICT #2	7022	RYAN MEADOW	1	03-Mar	
				118		

On the left side, there is a "User Options" menu with sections for "Quick Lookups", "Saved Searches", "Quick Lookups", "Exports", "Reports", "List Views", "Special Functions", and "Resources and Pick Lists". Below this is a "Favorite Tasks" section with a list of tasks including "Facility List", "BFP Assembly List", "BFP Testers List", "Tester Company List", "Test Kits List", "Test History", "Facility Survey History List", "Notice Setup", and "User List". At the bottom, there are buttons for "Send Notice", "Enter Survey", "Enter Test", and "Exit XC2".

Notes:

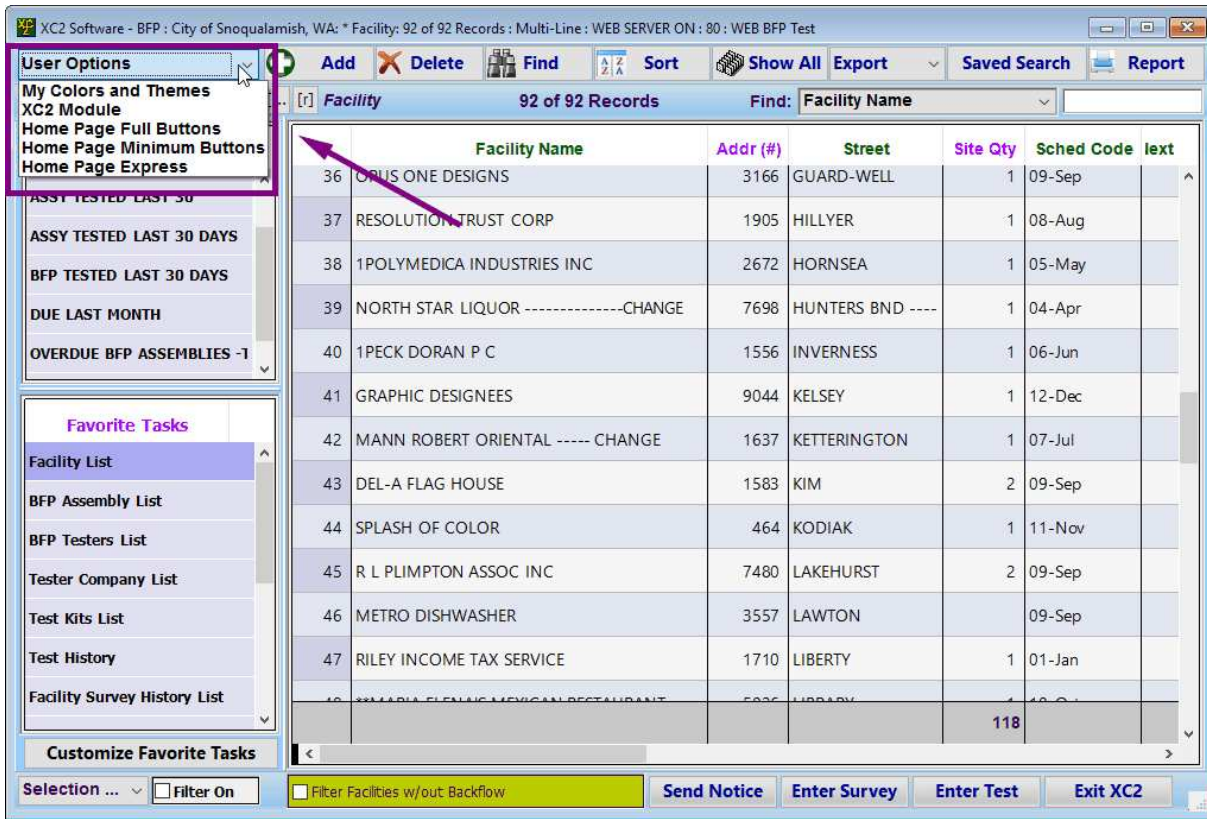
User Options

In the top left corner you can change your personal user options.

Some of these include

- Colors and Themes
- Change Modules
- Change Screen Sets

We will go deeper into this later on in this guide



Notes:

XC2 Kiosk

This is XC2's Kiosk

Here you can quickly access a variety of cool features

We will go deeper into this area later in this guide so for now just now be aware of XC2's Kiosk

The screenshot displays the XC2 Software interface for the City of Snoqualamish, WA. The main window shows a list of 92 facilities. The sidebar on the left contains several sections:

- User Options:** Includes a dropdown menu with options like Quick Lookups, Saved Searches, Exports, Reports, List Views, Special Functions, and Resources and Pick Lists. A purple box highlights this menu, and a purple arrow points to the 'Quick Lookups' option.
- Overdue tests:** Includes Failed Assemblies, Unprinted Test Report Results, and Tests Due Lookup.
- Favorite Tasks:** Includes Facility List, BFP Assembly List, BFP Testers List, Tester Company List, Test Kits List, Test History, Facility Survey History List, Notice Setup, and User List.
- Customize Favorite Tasks:** Includes Selection ... and Filter On options.

The main table displays the following data:

#	Facility Name	Addr (#)	Street	Site Qty	Sched Code	Next
53	OMELET HOUSE RESTAURANT ...CHANGE	709	WALLACE	1	07-Jul	
54	OPUS ONE DESIGNS	3166	GUARD-WELL	1	09-Sep	
55	PACIFIC JEWELRY & LOAN CO - CHANGESSS	2566	MAIN	1	03-Mar	
56	PARL MAYFAIR HOME OWNERS ASSOC ... CHAN	6931	MEADOW BEND	1	07-Jul	
57	QUALITY SURFACE OF METRO SNOQUALAMISH	7359	SEAY	1	03-Mar	
58	R L PLIMPTON ASSOC INC	7480	LAKEHURST	2	09-Sep	
59	RAINBOW REBUILDERS	6694	ABBOTSFORD	7	01-Jan	
60	RAINS-FLO PACKINGS	5102	CLARK-SHAW	1	01-Jan	
61	REAL PROPERTY VALUATIONS INC	9089	LINKSWAY	1	10-Oct	
62	REDDING EQUIPMENT CO	2230	VINMAR	1	10-Oct	
63	RESOLUTION TRUST CORP	1905	HILLYER	1	08-Aug	
64	RILEY INCOME TAX SERVICE	1710	LIBERTY	1	01-Jan	
65	SEARS J L & ASSOCIATES REAL ESTATE	7323	FAIRWAY	1	08-Aug	
66	SEARS J L & ASSOCIATES REAL ESTATE - CHAN	7323	FAIRWAY		08-Aug	
67	SENIORS IN COMMUNITY LIVING INC	9095	GREYSON	2	05-May	
68	SHERIDAN SANITATION DISTRICT #2	7022	RYAN MEADOW	1	03-Mar	
				118		

At the bottom of the interface, there are buttons for Send Notice, Enter Survey, Enter Test, and Exit XC2. There are also checkboxes for Filter On and Filter Facilities w/out Backflow.

Notes:

Favorite Tasks

Favorite Tasks will be your main navigation hub.

This is how you will access your "Data Tables"

Data Tables include

- Facility Records
- Assembly Records
- Testing Company Records
- Tester Records
- Test History
- Test Kit List

By clicking on one of the buttons inside the Main Page you will display the associated records

The screenshot shows the XC2 Software interface for the City of Snoqualamish, WA. The main window displays a table of 92 facilities. The 'Favorite Tasks' menu is open on the left, and the 'Facility List' option is selected. A red arrow points to the 'Facility List' option in the menu. The table below shows the following data:

#	Facility Name	Addr (#)	Street	Site Qty	Sched Code	Next
53	OMELET HOUSE RESTAURANT ...CHANGE	709	WALLACE	1	07-Jul	
54	OPUS ONE DESIGNS	3166	GUARD-WELL	1	09-Sep	
55	PACIFIC JEWELRY & LOAN CO - CHANGESSS	2566	MAIN	1	03-Mar	
56	PARK MAYFAIR HOME OWNERS ASSOC --- CHAN	6931	MEADOW BEND	1	07-Jul	
57	QUALITY SURFACE OF METRO SNOQUALAMISH	7359	SEAY	1	03-Mar	
58	R L PLIMPTON ASSOC INC	7480	LAKEHURST	2	09-Sep	
59	RAINBOW REBUILDERS	6694	ABBOTSFORD	7	01-Jan	
60	RAINS-FLO PACKINGS	5102	CLARK-SHAW	1	01-Jan	
61	REAL PROPERTY VALUATIONS INC	9089	LINKSWAY	1	10-Oct	
62	REDDING EQUIPMENT CO	2230	VINMAR	1	10-Oct	
63	RESOLUTION TRUST CORP	1905	HILLYER	1	08-Aug	
64	RILEY INCOME TAX SERVICE	1710	LIBERTY	1	01-Jan	
65	SEARS J L & ASSOCIATES REAL ESTATE	7323	FAIRWAY	1	08-Aug	
66	SEARS J L & ASSOCIATES REAL ESTATE - CHAN	7323	FAIRWAY		08-Aug	
67	SENIORS IN COMMUNITY LIVING INC	8005	CREEKSON	2	05-May	

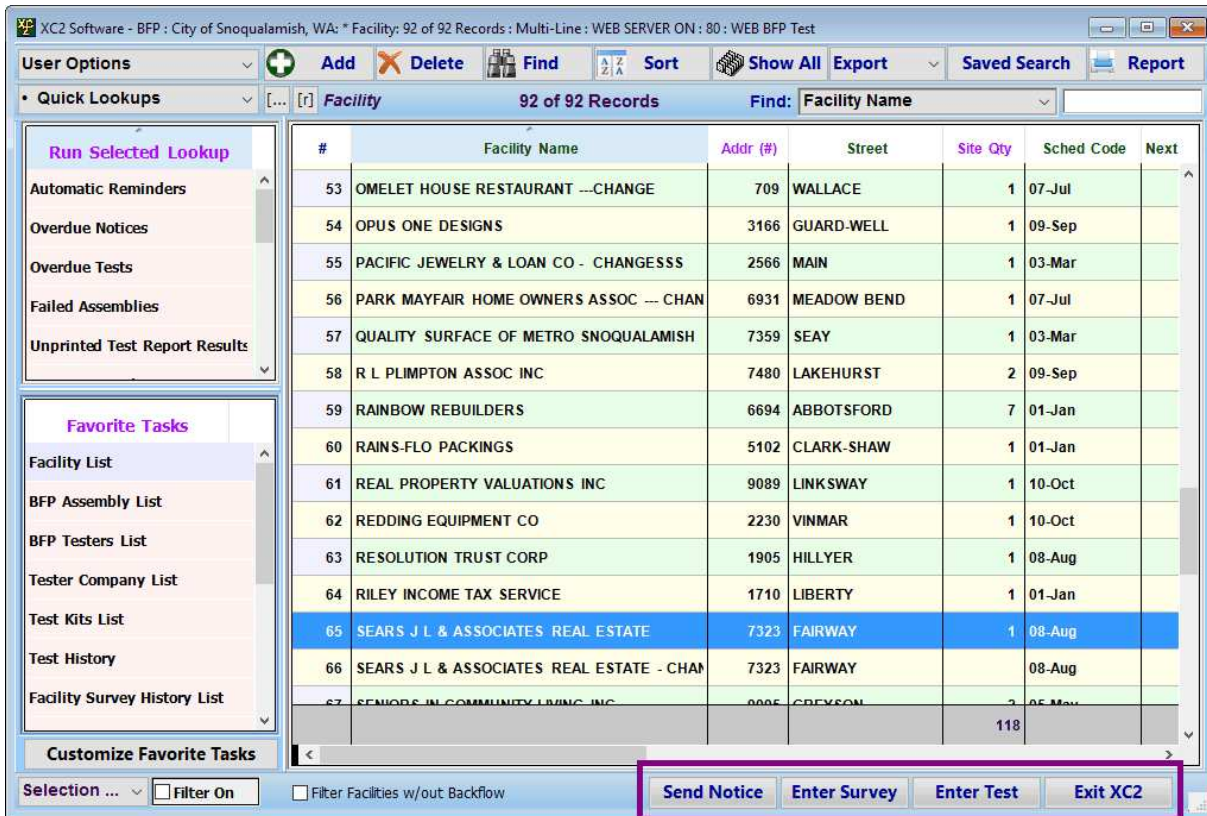
Notes:

Quick Entry Buttons

The Lower Right Portion has 4 buttons added for easy access

- Send Notice
- Enter Test
- Enter Survey
- Exit XC2

These buttons were added to the Main Page for quick access



Notes:



XC2 Software Knowledge Base



What Am I Looking At?

KB Asset ID: 3506

This page explains how to identify what types of records you are looking at.

Im Lost How Do I Get Back Home.

Here is a Senario

You have been opening and closing records all day and you are looking for a specific serial number for a backflow assembly on you list view but you cant find it.

You very well could be looking at the wrong list

If you find yourself in a senerio like this, it is a good idea to first confirm what Type of records you are looking at.

This page will go over how to confirm what type of records are being displayed on the screen

#	Facility Name	Addr (#)	Street	Site Qty	Sched Code	text
36	OPUS ONE DESIGNS	3166	GUARD-WELL	1	09-Sep	
37	RESOLUTION TRUST CORP	1905	HILLYER	1	08-Aug	
38	1POLYMEDICA INDUSTRIES INC	2672	HORNSEA	1	05-May	
39	NORTH STAR LIQUOR -----CHANGE	7698	HUNTERS BND ----	1	04-Apr	
40	1PECK DORAN P C	1556	INVERNESS	1	06-Jun	
41	GRAPHIC DESIGNEES	9044	KELSEY	1	12-Dec	
42	MANN ROBERT ORIENTAL ----- CHANGE	1637	KETTERINGTON	1	07-Jul	
43	DEL-A FLAG HOUSE	1583	KIM	2	09-Sep	
44	SPLASH OF COLOR	464	KODIAK	1	11-Nov	
45	R L PLIMPTON ASSOC INC	7480	LAKEHURST	2	09-Sep	
46	METRO DISHWASHER	3557	LAWTON		09-Sep	
47	RILEY INCOME TAX SERVICE	1710	LIBERTY	1	01-Jan	
48	MARIA ELENA MEXICAN RESTAURANT	5006	LIBERTY	1	12-Dec	
					118	

Notes:

Table Name

On Each List View, the Table Name is displayed in the top left corner.

Here we are looking at the Facility List View

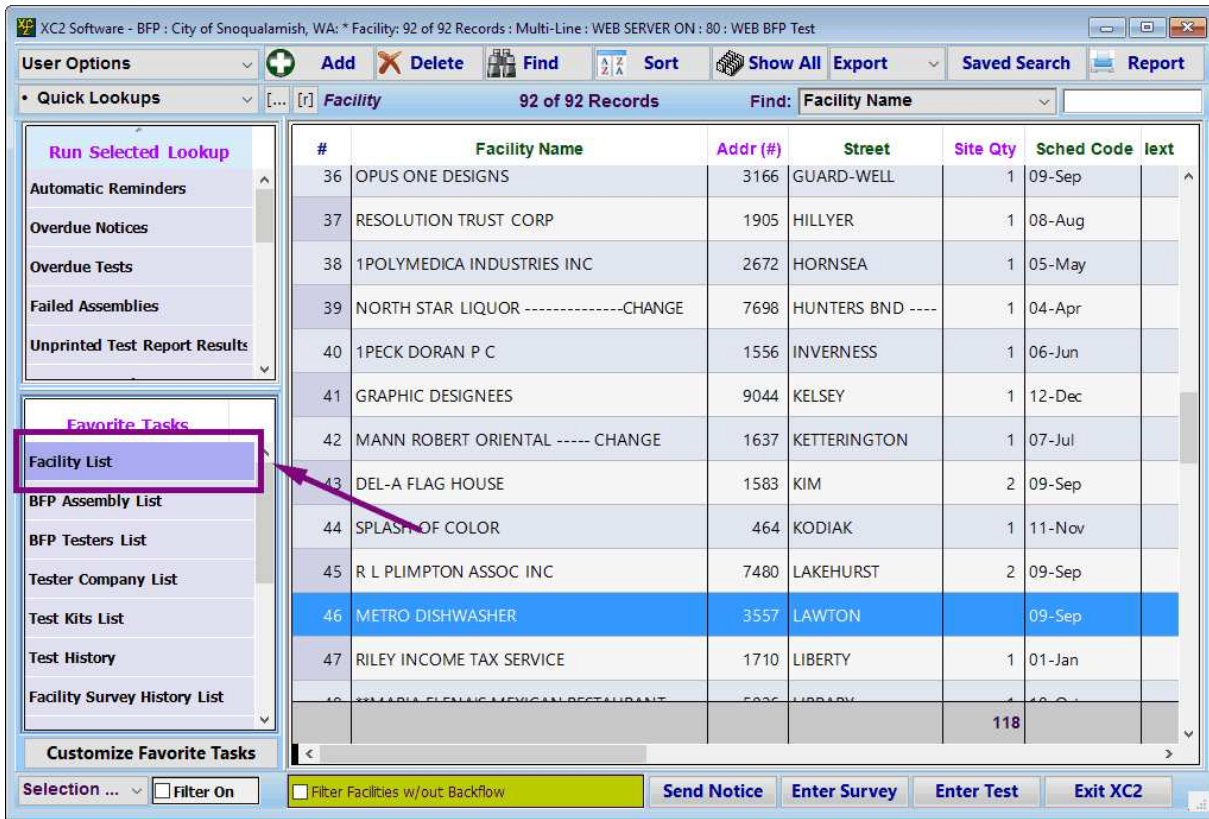
#	Facility Name	Addr (#)	Street	Site Qty	Sched Code	Iext
36	OPUS ONE DESIGNS	3166	GUARD-WELL	1	09-Sep	
37	RESOLUTION TRUST CORP	1905	HILLYER	1	08-Aug	
38	1POLYMEDICA INDUSTRIES INC	2672	HORNSEA	1	05-May	
39	NORTH STAR LIQUOR -----CHANGE	7698	HUNTERS BND ----	1	04-Apr	
40	1PECK DORAN P C	1556	INVERNESS	1	06-Jun	
41	GRAPHIC DESIGNEEES	9044	KELSEY	1	12-Dec	
42	MANN ROBERT ORIENTAL ----- CHANGE	1637	KETTERINGTON	1	07-Jul	
43	DEL-A FLAG HOUSE	1583	KIM	2	09-Sep	
44	SPLASH OF COLOR	464	KODIAK	1	11-Nov	
45	R L PLIMPTON ASSOC INC	7480	LAKEHURST	2	09-Sep	
46	METRO DISHWASHER	3557	LAWTON		09-Sep	
47	RILEY INCOME TAX SERVICE	1710	LIBERTY	1	01-Jan	
48	MARIA ELENA MEXICAN RESTAURANT	5006	LIBRARY	1	10-Sep	
				118		

Notes:

Highlighted Label

The current table that is selected will be highlighted in favorite tasks.

This is another way to confirm where you are located.



Notes:



How to Set the New Main Screen as the Default Screen and Automatically Appear on Startup

KB Asset ID: 2910

This page will describe how to set XC2's new Main Screen as the default navigation page and also have it appear when you log into XC2

Main Screen

This is the Main Screen

#	Facility Name	Addr (#)	Street	Site Qty	Sched Cc
1	LITTLETON GARAGE DOOR SERVICE	6669	SCOTTWOOD	1	01-Jan
2	SENIORS IN COMMUNITY LIVING INC	9095	GREYSON	2	05-May
3	RAINBOW REBUILDERS	6694	ABBOTSFORD	7	01-Jan
4	STOREWISE SOFTWARE INC	5038	SOMERSET	2	11-Nov
5	1LAKWOOD FAMILY MEDICAL CLINIC PC	7846	CHAMPIONS	1	01-Jan
6	1POLYMEDICA INDUSTRIES INC	2672	HORNSEA	1	05-May
7	SHERIDAN SANITATION DISTRICT #2	7022	RYAN MEADOW	1	03-Mar
8	1PECK DORAN P C	1556	INVERNESS	1	06-Jun
9	MEX IMPORTS - CHANGE	6471	CHANT	1	12-Dec
10	TAFOYA ELECTRIC CHANGE	1795	CHURCH VIEW	1	01-Jan
11	NORTH STAR LIQUOR -----CHANGE	7698	HUNTERS BND -----CH	1	04-Apr
12	DEL-SCREENPLAY VIDEO CENTERS	7805	ARCHER	1	11-Nov
				119	

Notes:

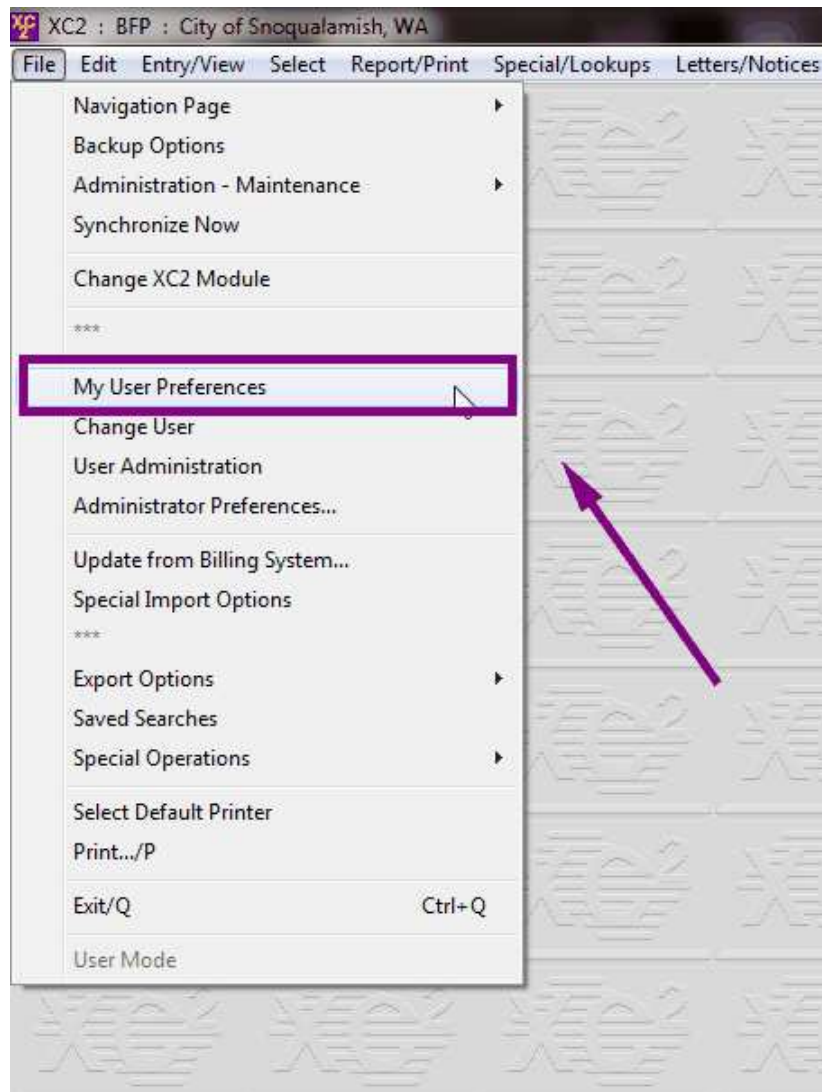
My User Preferences

You can set the new Main Screen as the default navigation page and set it to automatically launch upon startup within **My User Preferences**

To access My User Preferences

Go up to the File Menu

Select My user Preferences



Notes:

Startup Prefs Tab

For Main Screen to Appear upon Startup

Click

Startup Prefs Tab

Check **Use - Main Screen Feature**

Check **Display Homepage at Startup** to have it appear when you first login

User Preferences: DESIGNER

General Prefs **Startup Prefs** My Colors and Themes Home Page Prefs BFP Screen Sets Email PDF Prefs

Set Startup Preferences

Startup Notification

Display Home Page at Startup

Display Palette at Startup

No Home Page or Palette

Use - Main Screen Feature

Check for XC2 Updates on Startup

Startup List View - BFP

Display Equipment List

Display Facility List

Display Testers List

Startup List View - FOG

Display Interceptor List

Display Facility List

Display Disposal Entry

Use "Type Ahead" for Lookups

XC2 Picts Preferences

XC2 Picts Access

Image Warning Size 1,000 kb

Image Maximum Size 4,096 kb

Add if no records found

Load Image Document

Scan/Aquire Image

XC2 Picts - Don't Confirm External Viewer

Use New External Launch Routine

XC2 Picts - Open to Full Screen

Show Multiple Pictures

Show One Picture Only

List View Preferences

Initial Max Records Displayed 2,000

Main Page - Show Admin Pref/Resource Menus

Single-Click Main Page Functions List to Activate

Single-Click Main Page Favorites List to Activate

Type Ahead in List View

Use Type Ahead

Maximum Number of Records (Too Many Records may slow performance) 10,000

Use Default Prefs Only for Fonts/Sizes/Style/Color

User Pref List Password History Change Password Application Launch ... Quick Search Setup Done

Notes:



XC2 Software Knowledge Base



Resizing and Moving the Main Screen

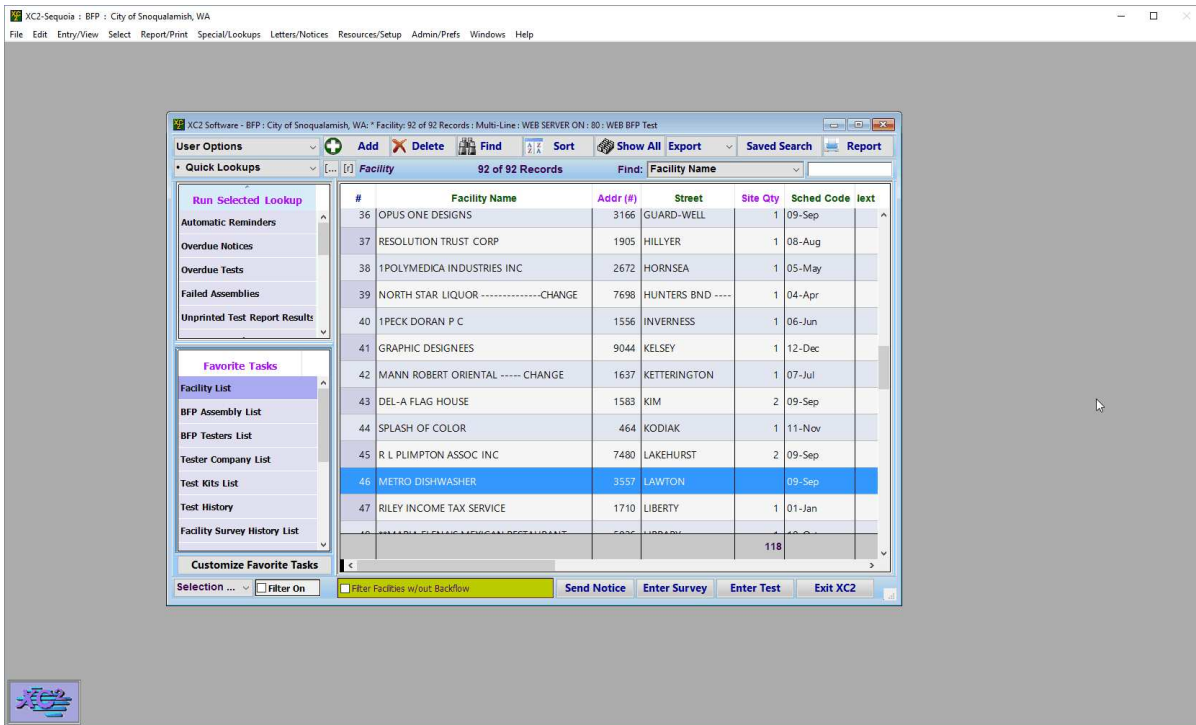
KB Asset ID: 3507

The Main Screen can be resized and moved around. This page describes how to do that.

The Main Screen Can be Resized and Moved

As you can see here, the selected main screen fits within XC2's Main Window

you can size and move the Main Screen withing XC2's Main Window

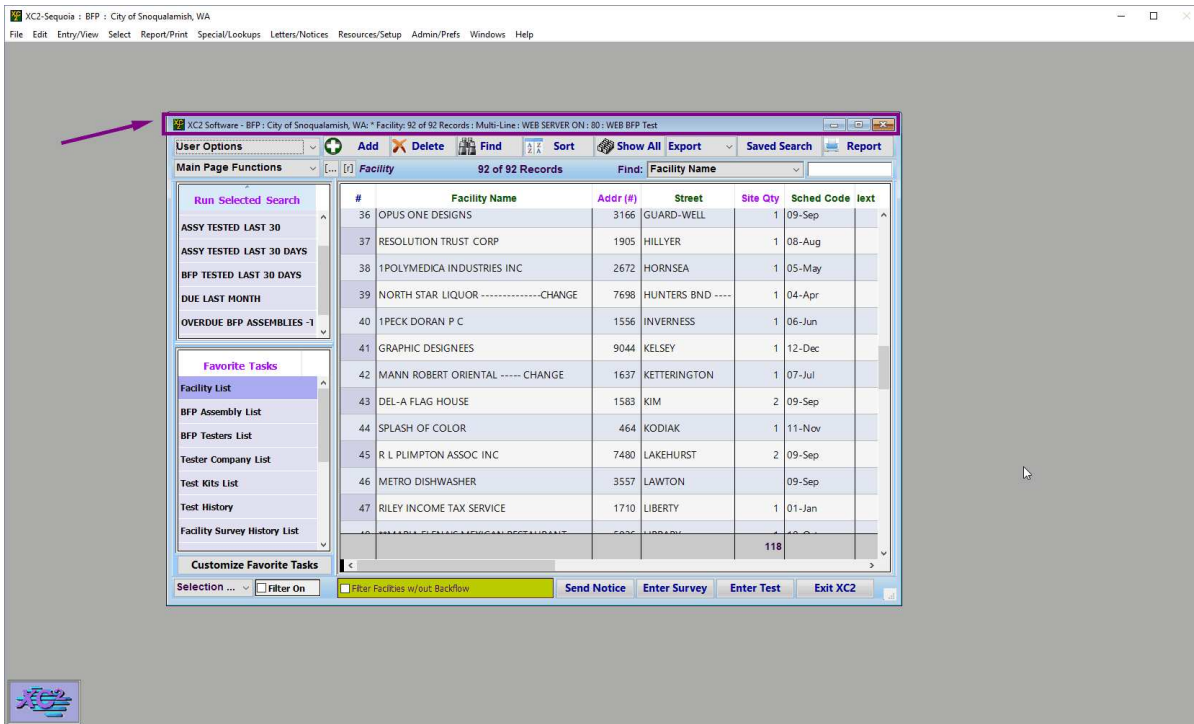


Notes:

Moving XC2 - Title Bar

You can move the Main Screen around by clicking on the Title Bar and Sliding the Main Screen to a different location

Click in the Title Bar and drag to your desired location



Notes:

Move Screen

The screenshot displays the XC2 Software interface for the City of Snoqualamish, WA. The main window shows a table with 92 records. The table columns are: #, Facility Name, Addr (#), Street, Site Qty, and Sched Code. The record for 'MANN ROBERT ORIENTAL' is highlighted in blue. A sidebar on the left contains sections for 'Quick Lookups' (Automatic Reminders, Overdue Notices, etc.) and 'Favorite Tasks' (Facility List, BFP Assembly List, etc.). At the bottom of the window, there are buttons for 'Send Notice', 'Enter Survey', 'Enter Test', and 'Exit XC2'. A status bar at the bottom indicates 'Filter Facilities w/out Backflow'.

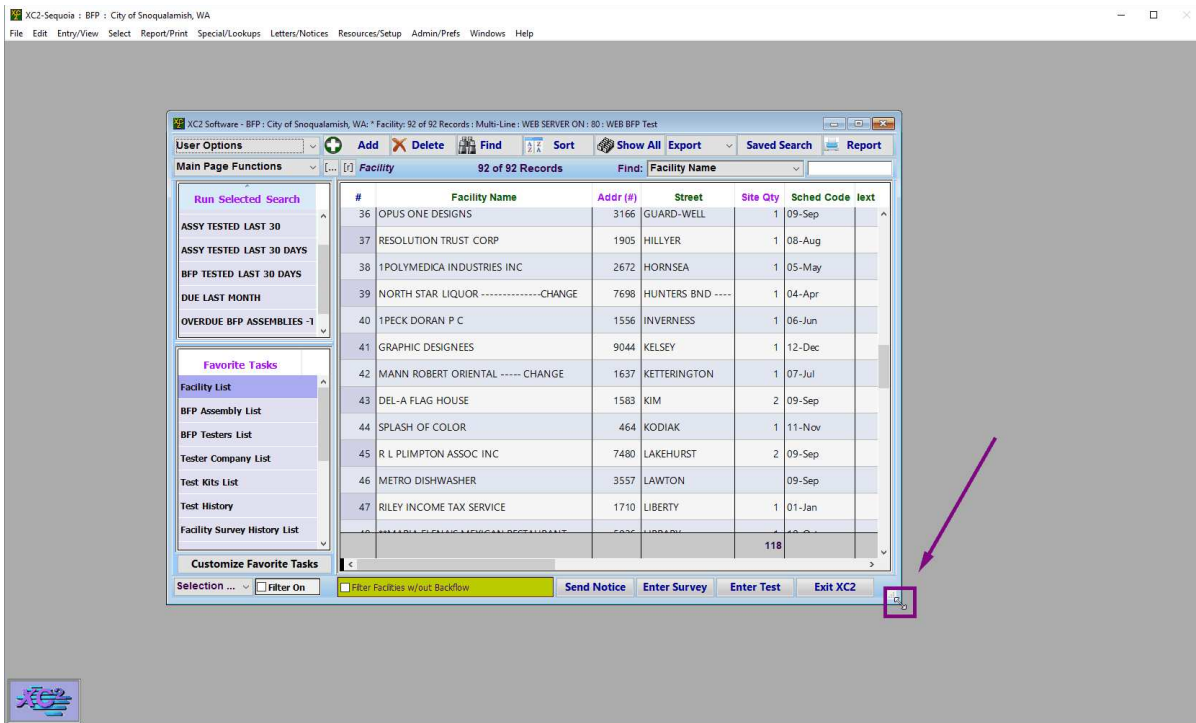
#	Facility Name	Addr (#)	Street	Site Qty	Sched Code
36	ORUS ONE DESIGNS	3166	GUARD-WELL	1	09-Sep
37	RESOLUTION TRUST CORP	1905	HILLYER	1	08-Aug
38	TPOLYMEDICA INDUSTRIES INC	2672	HORNSEA	1	05-May
39	NORTH STAR LIQUOR -----CHANGE	7698	HUNTERS BND ----	1	04-Apr
40	TRUCK DORAN P C	1556	INVERNESS	1	06-Jun
41	GRAPHIC DESIGNNEES	9044	KELSEY	1	12-Dec
42	MANN ROBERT ORIENTAL ----- CHANGE	1637	KETTERINGTON	1	07-Jul
43	DELA FLAG HOUSE	1583	KIM	2	09-Sep
44	SPASH OF COLOR	464	KODIAK	1	11-Nov
45	R PLIMPTON ASSOC INC	7480	LAKEHURST	2	09-Sep
46	METRO DISHWASHER	3557	LAWTON		09-Sep
47	RILEY INCOME TAX SERVICE	1710	LIBERTY	1	01-Jan
48	LIBRARY				118

Notes:

Resize Manually

The Main Screen can be Resized and made larger or smaller

Click on the edges or sides of the Main Screen to manually adjust its size



Notes:

Resize

The screenshot displays the XC2 Sequoia software interface. At the top, a menu bar includes 'File', 'Edit', 'Entry/View', 'Select', 'Report/Print', 'Special/Lookups', 'Letters/Notices', 'Resources/Setup', 'Admin/Prefs', 'Windows', and 'Help'. Below the menu is a toolbar with icons for 'Add', 'Delete', 'Find', 'Sort', 'Show All', 'Export', 'Saved Search', and 'Report'. The main window title is 'XC2 Software - BFP : City of Snoqualamish, WA * Facility: 92 of 92 Records : Multi-Line : WEB SERVER ON : 80 : WEB BFP Test'. The main area features a data table with the following columns: '#', 'Facility Name', 'Addr (#)', 'Street', 'Site Qty', 'Sched Code', and 'Iext'. The table contains 92 records, with the first few visible as follows:

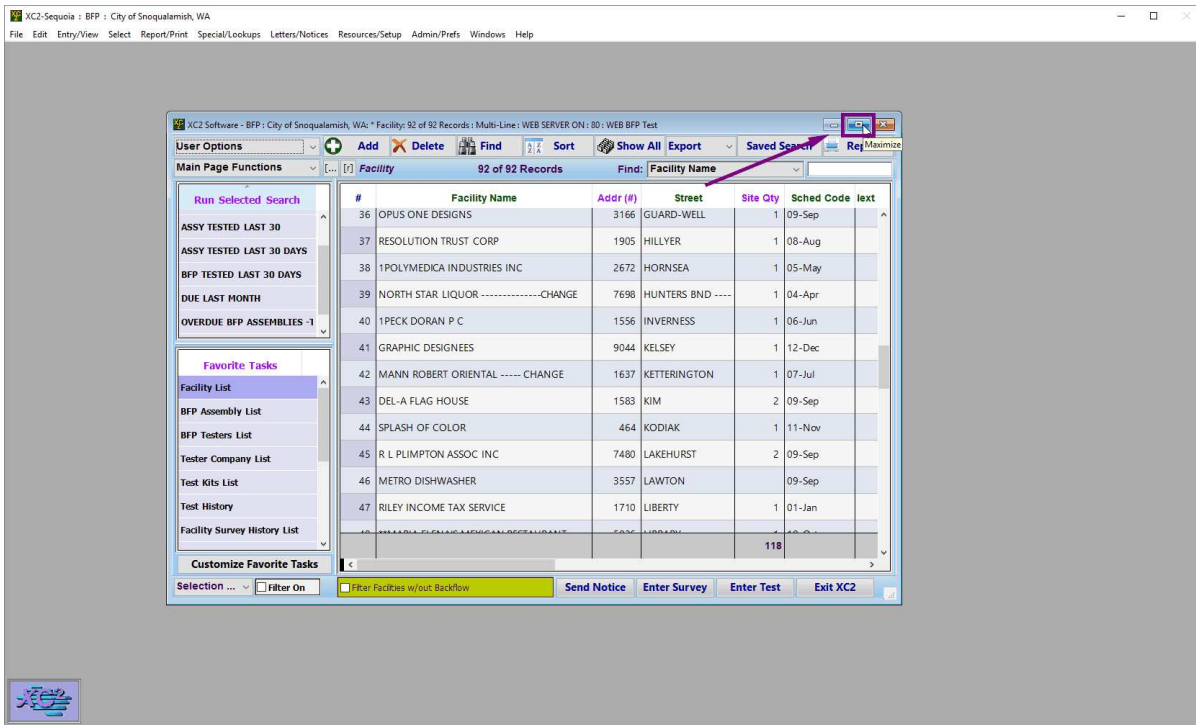
#	Facility Name	Addr (#)	Street	Site Qty	Sched Code	Iext
36	OPUS ONE DESIGNS	3166	GUARD-WELL	1	09-Sep	
37	RESOLUTION TRUST CORP	1905	HILLYER	1	08-Aug	
38	1POLYMEDICA INDUSTRIES INC	2672	HORNSEA	1	05-May	
39	NORTH STAR LIQUOR -----CHANGE	7698	HUNTERS BND ----	1	04-Apr	
40	1PECK DORAN P C	1556	INVERNESS	1	06-Jun	
41	GRAPHIC DESIGNEES	9044	KELSEY	1	12-Dec	
42	MANN ROBERT ORIENTAL ----- CHANGE	1637	KETERINGTON	1	07-Jul	
43	DEL-A FLAG HOUSE	1583	KIM	2	09-Sep	
44	SPLASH OF COLOR	464	KODIAK	1	11-Nov	
45	R L PLIMPTON ASSOC INC	7480	LAKEHURST	2	09-Sep	
46	METRO DISHWASHER	3557	LAWTON		09-Sep	
47	RILEY INCOME TAX SERVICE	1710	LIBERTY	1	01-Jan	

On the left side, there is a sidebar with 'Main Page Functions' and 'Favorite Tasks'. The 'Favorite Tasks' list includes: Facility List, BFP Assembly List, BFP Testers List, Tester Company List, Test Kits List, Test History, and Facility Survey History List. At the bottom of the main window, there are buttons for 'Send Notice', 'Enter Survey', 'Enter Test', and 'Exit XC2'.

Notes:

Maximize

You can Maximize the screen by clicking the Maximize button in the title bar



Notes:

Maximized

XC2-Seqoia : BFP : City of Snoqualamish, WA - [XC2 Software - BFP : City of Snoqualamish, WA - Facility: 92 of 92 Records - Multi-Line - WEB SERVER ON]

File Edit Entry/View Select Report/Print Special/Lookups Letters/Notices Resources/Setup Admin/Prefs Windows Help

User Options Add Delete Find Sort Show All Export Saved Search Report

Main Page Functions Facility 92 of 92 Records Find: Facility Name

#	Facility Name	Addr (#)	Street	Site Qty	Sched Code	Next Survey Dat	Last Survey Date	Notice Response Item	Notice Response Due	Facility BFP ID
36	OPUS ONE DESIGNS	3166	GUARD-WELL	1	09-Sep	09/14/11	09/14/06	TEST DUE #1	04/24/16	
37	RESOLUTION TRUST CORP	1905	HILLYER	1	08-Aug	11/16/12	11/16/07	TEST DUE #1	07/24/16	
38	1POLYMEDICA INDUSTRIES INC	2672	HORNSEA	1	05-May	04/04/11	04/04/06	TESTLTR2	04/24/16	
39	NORTH STAR LIQUOR -----CHANGE	7698	HUNTERS BND ----	1	04-Apr		04/18/02	TEST DUE #1	04/24/16	
40	1PECK DORAN P C	1556	INVERNESS	1	06-Jun	02/17/11	02/17/06	TEST DUE #3	07/14/16	
41	GRAPHIC DESIGNEES	9044	KELSEY	1	12-Dec	11/29/16	11/29/11	TEST DUE #1	04/24/16	
42	MANN ROBERT ORIENTAL ----- CHANGE	1637	KETHERINGTON	1	07-Jul	12/09/11	12/09/06	TEST DUE #1	04/24/16	
43	DEL-A FLAG HOUSE	1583	KIM	2	09-Sep	04/14/15	04/14/14	TEST DUE #1	11/10/16	
44	SPLASH OF COLOR	464	KODIAK	1	11-Nov	01/27/13	01/27/08	TEST DUE #1	04/24/16	
45	R L PLIMPTON ASSOC INC	7480	LAKEHURST	2	09-Sep	09/09/12	09/09/07	TEST DUE #1	04/24/16	
46	METRO DISHWASHER	3557	LAWTON		09-Sep			TEST DUE #1	04/24/16	
47	RILEY INCOME TAX SERVICE	1710	LIBERTY	1	01-Jan	04/26/12	04/26/07	TEST DUE #1	07/07/16	
48	**MARIA ELENA'S MEXICAN RESTAURANT	5026	LIBRARY	1	10-Oct	03/24/13	03/24/08	TEST DUE #3	07/14/16	
49	ACADEMY VETERINARY HOSPITAL	8350	LIGHTHOUSE	3	08-Aug	08/14/11	08/14/04	TEST DUE #1	07/07/16	
50	REAL PROPERTY VALUATIONS INC	9089	LINKSWAY	1	10-Oct	12/21/15	12/21/10	TEST DUE #1	04/24/16	
51	PACIFIC JEWELRY & LOAN CO - CHANGESSS	2566	MAIN	1	03-Mar	02/02/13	02/02/08	TEST DUE #1	04/24/16	
52	TEST FACILITY	123	MAIN	15	02-Feb			TEST DUE #1	04/24/16	
53	BOBO'S CARWASH	123	MAIN	1				TEST DUE #1	04/24/16	
54	BURGER SHACK	123	MAIN					TEST DUE #1	04/24/16	
55	WORLD WIDE FUNDING	197	MAXWELL	2	05-May			TEST DUE #1	04/24/16	
56	AAA - WORLD WIDE FUNDING	197	MAXWELL	1	05-May			TEST DUE #1	04/24/16	
				118						

Favorite Tasks

Facility List

BFP Assembly List

BFP Testers List

Tester Company List

Test Kits List

Test History

Facility Survey History List

Notice Setup

User List

Automatic Reminders

Automatic Notices

Administrator Setup

Lookup-Resource Lists

H2O Organization List

Mailing Addresses List

Customize Favorite Tasks

Selection ... Filter On Filter Facilities w/out Backflow

Send Notice Enter Survey Enter Test Exit XC2

Notes:



XC2 Software Knowledge Base



Automatically Adjust Column Widths and Auto Maximize

KB Asset ID: 2892

This page describes how to have XC2 automatically adjust column widths on List Views and how to use the auto Maximize Feature.

Note: This feature is only available in XC2 XO.

List Views

You are probably aware that you can manually adjust column widths, but you can also have XC2 widen the column widths for you.

Below is a list view of Facility Records where the column width is either too large or too small for the entries within the column.

#	Facility Name	Idr	ITree	C	Hed	Co	urve	urve	sp	asp	ty	E
1	A & B FOREST FRESH CO	115	FERC	1	08-Aug	3/11	3/06	TE	1/16			
2	SUNRISE CHIROPRACTICS	155	MOI	1	08-Aug			TE	1/16			
3	BOBO'S CARWASH	123	MAII	1				TE	1/16			
4	SPECIALTY SYSTEMS	785	WAL	1	05-May	2/08	2/03	TE	1/16			
5	HOBO'S DINER					3/17	3/16					
6	BOGUS BURRITO	387	BURI	1								
7	TEST PIZZA	123	TEST	1	01-Jan							
8	TEST FACILITY	123	BOG			3/17	3/16					
9	SEARS J L & ASSOCIATES REAL ESTATE	123	FAIR	1	08-Aug							
10	MCDONALDS				12-Dec							
11	FLEABOTTOM ENTERPRISES	100	MOI		MAR	3/17	3/16	TE	1/16			
12	AAA - WORLD WIDE FUNDING	197	MAX	1	05-May			TE	1/16			
		118										

Notes:

Adjusting Column Widths

In the top left corner of the Main Page, there is a box with 3 dots.

To adjust the column widths of all columns, **click this box.**

The screenshot shows the XC2 Software interface for a facility list. The window title is "XC2 Software - BFP : City of Snoqualamish, WA: * Facility: 92 of 92 Records : Multi-Line : WEB SERVER ON : 80 : WEB BFP Test". The interface includes a menu bar with options like Add, Delete, Find, Sort, Show All, Export, Saved Search, and Report. Below the menu bar, there's a section for "Special Functions" with a three-dot menu icon highlighted by a purple box. A purple arrow points to this icon. The main area displays a table with the following data:

#	Facility Name	Id	tree	e	C	hed	Co	urve	urve	sp	asp	ty	E
1	A & B FOREST FRESH CO	115	FERC	1	08-Aug	3/11	3/06	TE	1/16				
2	SUNRISE CHIROPRACTICS	155	MOI	1	08-Aug			TE	1/16				
3	BOBO'S CARWASH	123	MAII	1				TE	1/16				
4	SPECIALTY SYSTEMS	785	WAL	1	05-May	2/08	2/03	TE	1/16				
5	HOBO'S DINER					3/17	3/16						
6	BOGUS BURRITO	387	BUR	1									
7	TEST PIZZA	123	TEST	1	01-Jan								
8	TEST FACILITY	123	BOG			3/17	3/16						
9	SEARS J L & ASSOCIATES REAL ESTATE	323	FAIR	1	08-Aug								
10	MCDONALDS				12-Dec								
11	FLEABOTTOM ENTERPRISES	100	MOL		MAR	3/17	3/16	TE	1/16				
12	AAA - WORLD WIDE FUNDING	197	MAX	1	05-May			TE	1/16				

Notes:

Widths will be automatically adjusted

XC2 Software - BFP : City of Snoqualamish, WA: * Facility: 80 of 92 Records : Multi-Line : WEB SERVER ON : 80 : WEB BFP Test

User Options Add Delete Find Sort Show All Export Saved Search Report

Special Functions Facility 80 of 92 Records Find: Facility Name

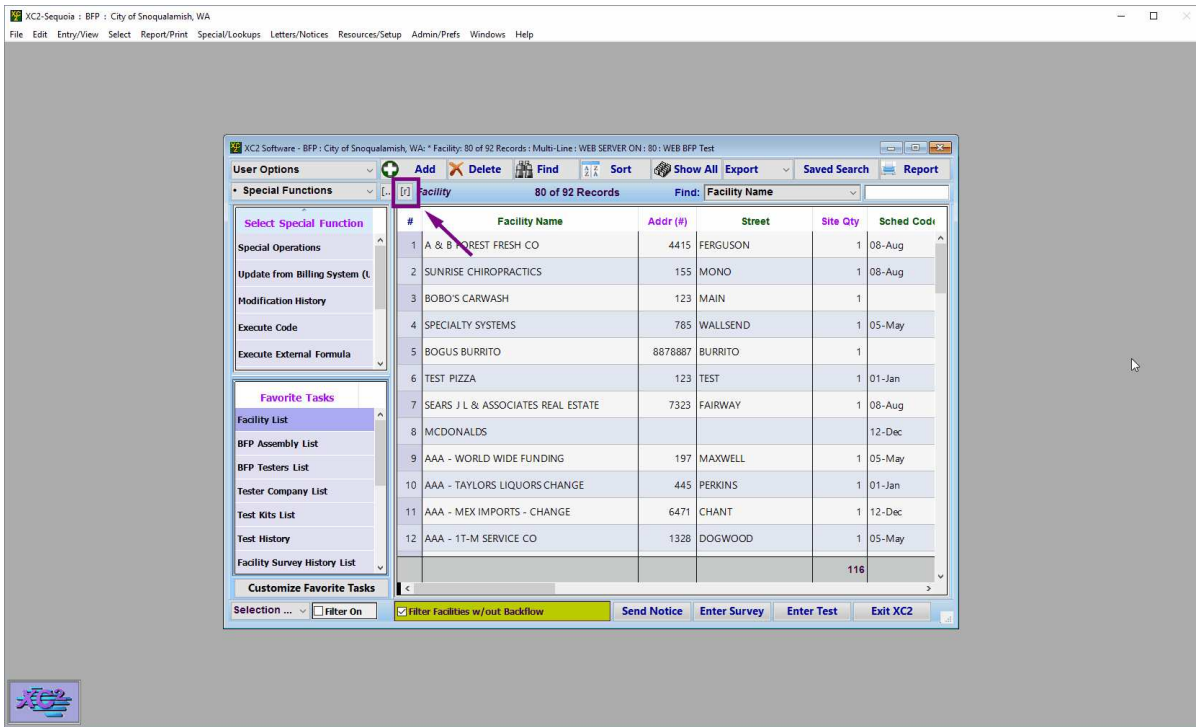
#	Facility Name	Addr (#)	Street	Site Qty	Sched Code	text
1	A & B FOREST FRESH CO	4415	FERGUSON	1	08-Aug	
2	SUNRISE CHIROPRACTICS	155	MONO	1	08-Aug	
3	BOBO'S CARWASH	123	MAIN	1		
4	SPECIALTY SYSTEMS	785	WALLSEND	1	05-May	
5	BOGUS BURRITO	8878887	BURRITO	1		
6	TEST PIZZA	123	TEST	1	01-Jan	
7	SEARS J L & ASSOCIATES REAL ESTATE	7323	FAIRWAY	1	08-Aug	
8	MCDONALDS				12-Dec	
9	AAA - WORLD WIDE FUNDING	197	MAXWELL	1	05-May	
10	AAA - TAYLORS LIQUORS CHANGE	445	PERKINS	1	01-Jan	
11	AAA - MEX IMPORTS - CHANGE	6471	CHANT	1	12-Dec	
12	AAA - 1T-M SERVICE CO	1328	DOGWOOD	1	05-May	
				116		

Selection ... Filter On Filter Facilities w/out Backflow Send Notice Enter Survey Enter Test Exit XC2

Notes:

Auto Maximize

You can also Auto Maximize the Main Screen by clicking the box just to the right of the Auto Adjust button. This will enlarge the Main Screen to fill the entire XC2 window.



Notes:

The Main Screen will be Auto Maximized

#	Facility Name	Addr (#)	Street	Site Qty	Sched Code	Next Survey Date	Last Survey Date	Notice Response Item	Notice Respor
1	A & B FOREST FRESH CO	4415	FERGUSON	1	08-Aug	08/03/11	08/03/06	TEST DUE #1	
2	SUNRISE CHIROPRACTICS	155	MONO	1	08-Aug			TEST DUE #1	
3	BOBO'S CARWASH	123	MAIN	1				TEST DUE #1	
4	SPECIALTY SYSTEMS	785	WALLESEND	1	05-May	05/22/08	05/22/03	TEST DUE #1	
5	BOGUS BURRITO	8878887	BURRITO	1					
6	TEST PIZZA	123	TEST	1	01-Jan				
7	SEARS J L & ASSOCIATES REAL ESTATE	7323	FAIRWAY	1	08-Aug				
8	MCDONALDS				12-Dec				
9	AAA - WORLD WIDE FUNDING	197	MAXWELL	1	05-May			TEST DUE #1	
10	AAA - TAYLORS LIQUORS CHANGE	445	PERKINS	1	01-Jan			TEST DUE #1	
11	AAA - MEX IMPORTS - CHANGE	6471	CHANT	1	12-Dec			TEST DUE #2	
12	AAA - 1T-M SERVICE CO	1328	DOGWOOD	1	05-May			TEST DUE #1	
13	JOHNS GRILL	63	ELLIS	1				TEST DUE #1	
14	TOM'S WEIGHTERS	589	TANKER	1				TEST DUE #1	
15	BOBS BBQ		BELL	1				TEST DUE #1	
16	FINNIGANS BELL PEPS	22222	BELL	4				TEST DUE #1	
17	HOSPITALITY GROUP INC THE	429	CALI GLEN	1	10-Oct	03/28/13	03/28/08	TEST DUE #1	
18	CAPTAIN'S CHAIR ----- CHANGE	6725	SHERIDAN	2	02-Feb	02/28/11	02/07/03	TEST DUE #1	
19	TEST FACILITY	123	MAIN	15	02-Feb			TEST DUE #1	
				116					

Notes:



XC2 Software Knowledge Base



Facility vs Assembly

KB Asset ID: 3596

The 2 primary working areas in XC2 are the FACILITY and the ASSEMBLY records. This document will explain the fundamental differences.

The Assembly Record

The assembly record is specific to the backflow itself.

Areas Indicated

1. Address information

- Service Address
- Mailing Address
- Owner Address
- Property Manager Address

2. Equipment Information

- Device Type
- Size Manufacturer
- Model
- Status
- Test Dates

3. Location Specific Information

- Hazard Type
- Meter information
- Physical assembly location
- Comments

4. Protection Information

XC2 Software - BFP : Lee University (Livingston East) ; Assembly Serial Num : 14257 ; Ass'y Loc. #2 : DC ; Facility ID: 100881 ; 1 of 6 Selected

Acct/Address Info History Comments Custom Fields

Service Address Info Mailing Addresses Owner Addresses Property Manager

1 **Facility Address Info** Facility ID No: 100881 Assembly ID No: 2001458

Facility Name Lee University (Livingston East)

Facility Name 2

Service Addr. 1120 NE Street Ocoee ST

Cross Street 11th Street N.E. Addr. Unit

City ST Zip Cleveland TN State TN Zip 37311

Facility Contact Info Email Notices

Contact Name Leanard Last Johnston

Position

Phone (423) 790-6078 Ext #2 Cell

E-Mail Address

2 **Assembly Details**

Type DC Assembly List

Size 3/4" By Pass

Mfg WATTS No Images

Model 007M1QT No Site Map

Serial Num 14257

Status Status 1 Cnt. Y

Next Test Due 08/31/2017 Mo. 8

Frequency 12 Months

Last/Dflt Tester Clark Crawford View

Last Test Date 08/11/2016 PASS

Test Form Print Date 07/14/2016

Inst/Replace By Clark Crawford

In Service 09/22/2010 Abv. Grade 0

Install Due / /

Replacement Due Date / /

Inst/Replace Date 09/22/2010 Replace

Permit Num

Schedule Code 08-Aug

Containment Containment

3 **Ass'y Loc. #2** UD Alp Map Page

Meter Acct Num 00000 Custom 1

Meter 000000 Last Survey / /

Sz. Next Survey / /

Service Type Fire Systems Haz. Level Low

Hazard Type Class 1

Ass'y Location Science Building Mech. Room Left Corner

Show Minimum Fields

4 **Facility Area Code** No Facility Areas Entered Pressure Zone

Floor Room

Hazard Contaminant Flow GPM 0

Inactive Back Pressure

Flood Protect Continuous Pressure

UD CB 1 Back Siphonage

Escap. Protect Improper Application

Facility Record

The Facility record is what we refer to as the Parent to the backflow record.

Unlike an assembly record that has specific backflow information, the facility is used to group backflow records into one.

Think of it as the building where the backflows are locate.

Areas Indicated

1. Address information

- Service Address
- Mailing Address
- Owner Address
- Property Manager Address

2. Location Identifiers

- ID Numbers
- Survey Dates
- Map Page Location

3. Location Status

- Hazard Type
- Service Type
- Assigned Inspector

4. Associated Backflow List

XC2 Software - BFP : Lee University (Livingston East) : Assembly Serial Num : 14257 : Assy Loc. #2 : DC : Facility ID: 100881 : 1 of 6 Selected

Facility Info | Custom Fields | Comments | Expand List

Service Address Info | Mailing Addresses | Owner Addresses | Property Manager

Facility Address Info | Facility ID No: 100881

1 Facility Name: Lee University (Livingston East)
 Facility Name 2:
 Service Addr. 450 NE Street 19th ST
 Addr. 2 11th Street N.E. Addr. Unit:
 City ST Zip Cleveland State TN Zip 37311
 Contact Name Leanard Last Johnston
 Position Cell
 Phone (423) 790-6078 Ext. Emerg Phone
 EMail Address

Location Identifiers | Facility ID No: 100881

2 Location ID:
 Customer Code RSRA-2386 For Customer
 Tester Code VRFE-6653 For Tester
 Group Code Edit Code
 Acct Number 00000 Seq
 Parcel Number
 Last Survey Date / / Freq. (mos.) 0
 Next Survey Date / / FACILITY_06.1
 Schedule Code 08-Aug
 Map Page

Location Status

3 Service Type Fire Systems
 Facility Type
 Facility Status
 Custom 1
 Assigned Inspector
 Auth. Tester Company
 SIC Code
 Custom 2
 Address Options
 Update Options
 Meter & GPS Info

BFP Assembly List | BFP Assembly History | Letter History | Surveys/Inspections | All Devices | Facility Area

#	Serial Num	Type	Size	Mfg	Next Test	Last Test	Active	Count	Status	Service Address	Assy Location
1	14257	DC	3/4"	WATTS	08/31/17	08/11/16	✓	Y	Status 1	1120 NE Ocoee ST	Science Building Mech. I
2	68230	DCDA	6"	AMES	08/31/17	08/11/16	✓	Y	Status 1	1120 NE Ocoee ST	Science Building Mech. I
3	49000	RP	3"	WILKIN	08/31/17	08/11/16	✓	Y	Status 1	1120 NE Ocoee ST	Science Building Mech. I

Quick Test Entry | Enter New Test | New BFP Assembly | Send Notice | Delete Item | View BFP Assem... | Expand List | Exclude Inactive

Pictures/Site Map | MapPoint | Qty BFP 6 | Add Facility | Search | Report/Print | Cancel | Save

What List Am I Lookin At?

When looking at the list view, which list you are currently viewing is indicated above the listing of records.

The title circled indicates that the current list view is that of Assembly Records.



Notes:



XC2 Software Knowledge Base



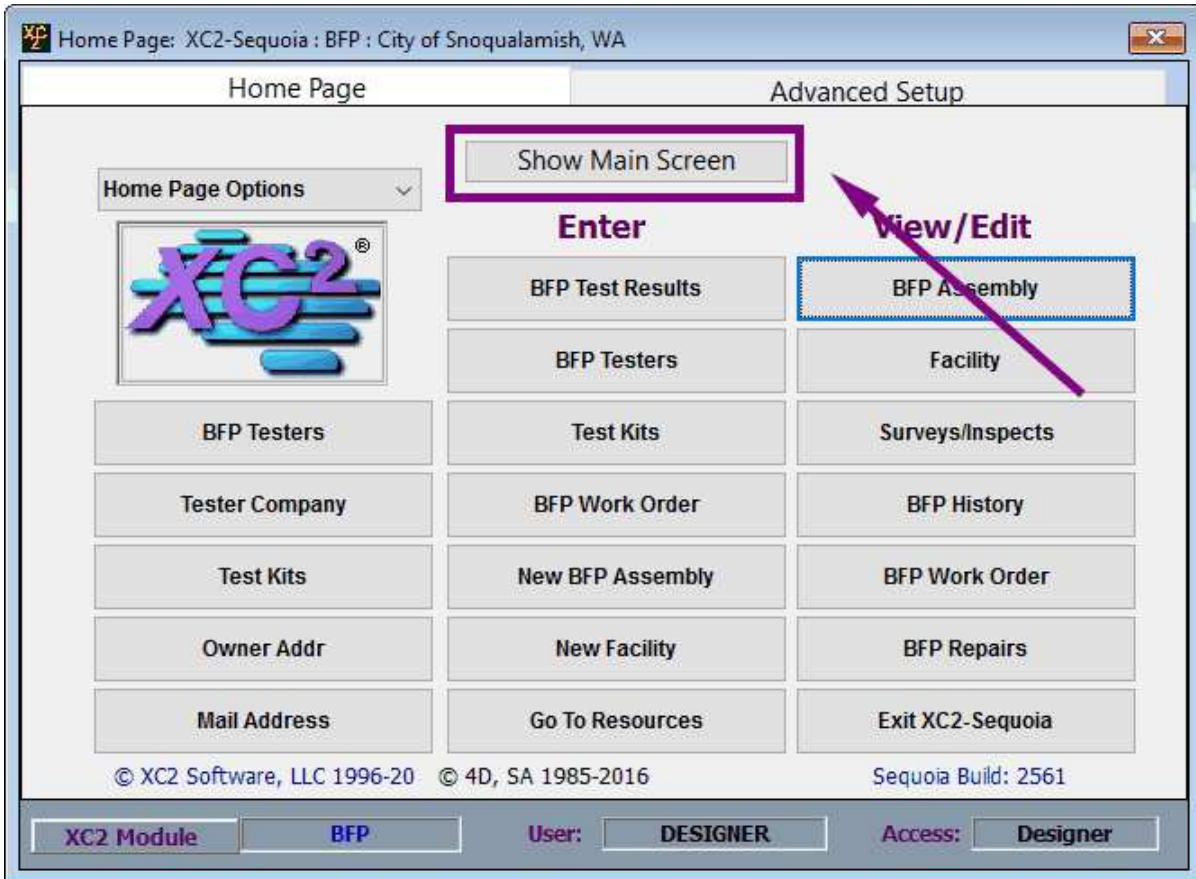
How to Access the Main Screen

KB Asset ID: 2909

Just in case the screen is closed accidentally, this page will describe how to make the screen appear again.

From Older Screen

If the older screen is present you can access the larger screen by clicking Show Main Screen

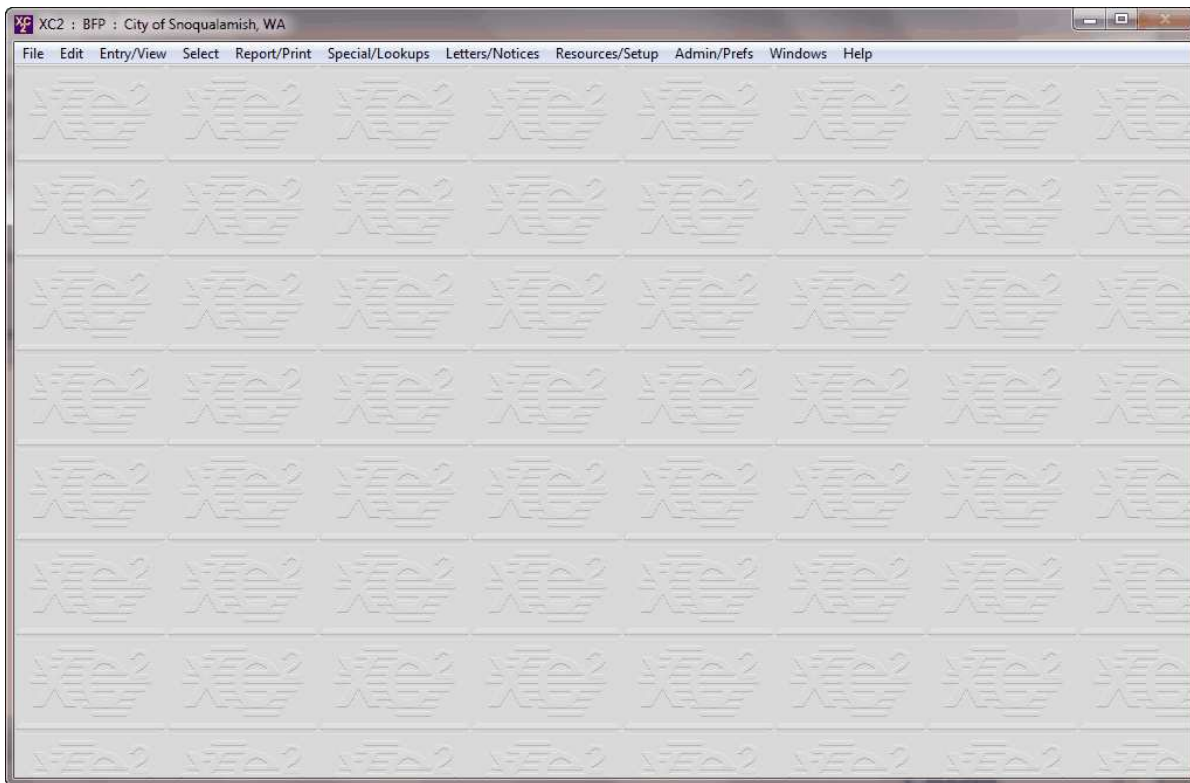


Notes:

If No Screen is Present

If you do not have a screen visible you can access the main screen two different ways.

Here is an example of what XC2 looks like if no screen is present.



Notes:

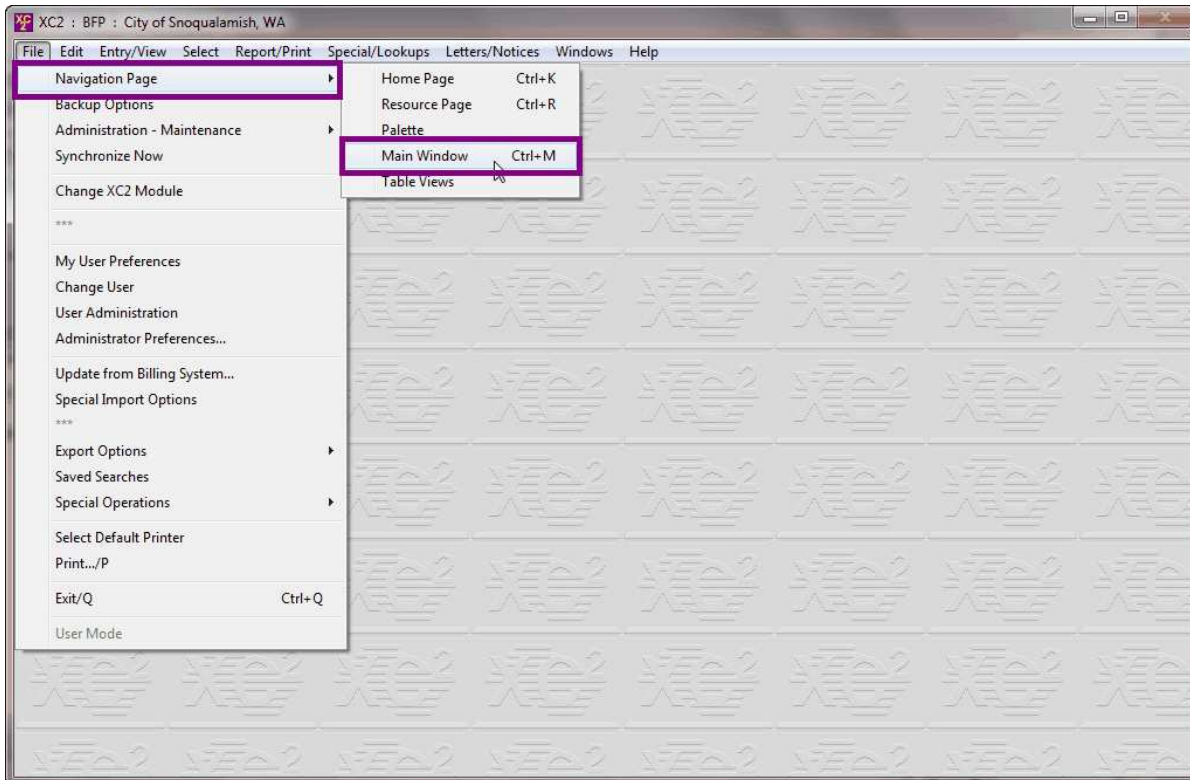
From File Menu

You can access the Main Screen from the file menu.

Click File

Navigation Page

Main Window



Notes:

Click XC2 Logo

You may also click the XC2 Logo in the bottom left corner



Notes:

Main Screen

All three methods shown will bring the main screen back up.

You may also want to check if the main screen is your default navigation page.

Click the link below to learn how to set the main screen as your default navigation page.

Setting Main Screen as Default

#	Facility Name	Addr (#)	Street	Site Qty	Sched Cc
1	LITTLETON GARAGE DOOR SERVICE	6669	SCOTTWOOD	1	01-Jan
2	SENIORS IN COMMUNITY LIVING INC	9095	GREYSON	2	05-May
3	RAINBOW REBUILDERS	6694	ABBOTSFORD	7	01-Jan
4	STOREWISE SOFTWARE INC	5038	SOMERSET	2	11-Nov
5	1LAKEWOOD FAMILY MEDICAL CLINIC PC	7846	CHAMPIONS	1	01-Jan
6	1POLYMEDICA INDUSTRIES INC	2672	HORNSEA	1	05-May
7	SHERIDAN SANITATION DISTRICT #2	7022	RYAN MEADOW	1	03-Mar
8	1PECK DORAN P C	1556	INVERNESS	1	06-Jun
9	MEX IMPORTS - CHANGE	6471	CHANT	1	12-Dec
10	TAFOYA ELECTRIC CHANGE	1795	CHURCH VIEW	1	01-Jan
11	NORTH STAR LIQUOR -----CHANGE	7698	HUNTERS BND -----CH	1	04-Apr
12	DEL-SCREENPLAY VIDEO CENTERS	7805	ARCHER	1	11-Nov
				119	

Notes:



Sorting A List And Creating Subset of Records

KB Asset ID: 3353

There will be times when you will not want to use the search features but instead gather a list, sort that list, highlight specific records and create a subset.

Sorting List and Subsets

In this case, I am looking for all Backflow history with a date range

1. Backflow History button
2. Click the All tab
3. Show All Records
4. Sort Event Date column

#	Event Date	Service Address	Code	Mfr	Type	Size
1			PASS			
2	02/27/98	717 16 STREET SW	PASS	WATTS	DCVA	2"
3	05/02/00	717 16 STREET SW	PASS	WATTS	DCVA	2"
4	02/27/98	717 16 STREET SW	PASS	WATTS	RP	2"
5	05/02/00	717 16 STREET SW	PASS	WATTS	RP	2"
6	02/26/98	2172 BRIER PARK PL NW	PASS	FEBCO	RPDA	2 1/2"
7	02/26/98	2159 BRIER PARK PL NW	PASS	WATTS	DCVA	6"
8	02/15/98	717 16 STREET SW	PASS	WATTS	RP	2"
9	03/05/98	717 16 STREET SW	FAIL/PASS	WATTS	DCVA	8"
10	02/15/98	717 16 STREET SW	FAIL/PASS	WATTS	RPDA	1 1/2"
11	02/15/98	717 16 STREET SW	PASS	WATTS	RP	1 1/2"
12	04/17/00	150 ASH AVE SE	PASS	WATTS	RP	3/4"
13	05/02/00	717 16 STREET SW	FAIL/PASS	WATTS	DCVA	8"
14	02/08/01	64 CORBITT WAY SE	FAIL/PASS	WATTS	RP	1/2"
15	09/16/99		PASS			

Notes:

Highlighting Records

There are a couple of ways to highlight records in a list.

If there are gaps between the records you wish to highlight

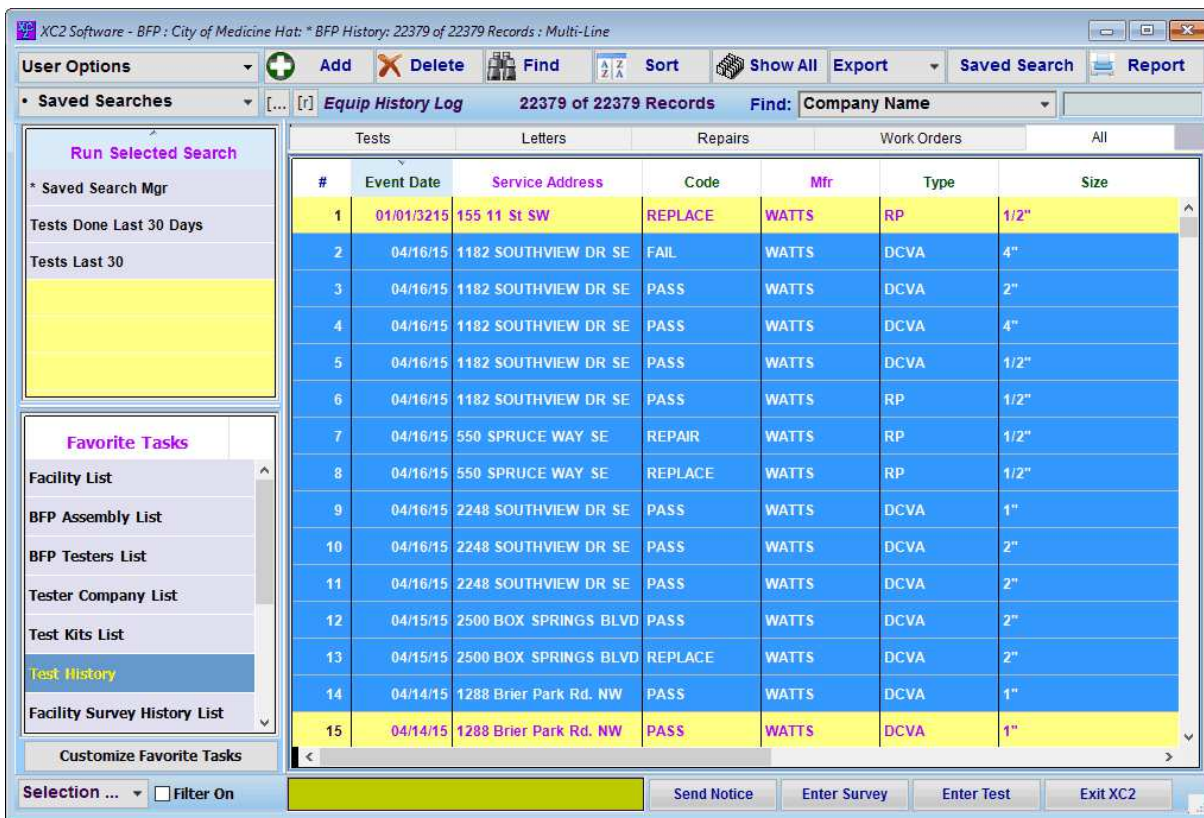
- Hold the Control key down then click on record

If the records oare all in a row and the entire list can be highlighted without scrolling

- Hold the left mouse button down while dragging through the list of records

If the list you need to highlight is long and continues past the screen.

- Highlight the first record in the list that you wish in the list
- Scroll through the list until you see the last record you wish in the list
- Hold the Shift key down and click on the last record



Notes:

Create Your Subset

Once you have the records highlighted you wish to have in your list

Pres Control + H key

The screenshot shows the 'Equip History Log' window with 22379 records. The table below represents the data shown in the interface:

#	Event Date	Service Address	Code	Mfr	Type	Size
1	01/01/3215	155 11 St SW	REPLACE	WATTS	RP	1/2"
2	04/16/15	1182 SOUTHVIEW DR SE	FAIL	WATTS	DCVA	4"
3	04/16/15	1182 SOUTHVIEW DR SE	PASS	WATTS	DCVA	2"
4	04/16/15	1182 SOUTHVIEW DR SE	PASS	WATTS	DCVA	4"
5	04/16/15	1182 SOUTHVIEW DR SE	PASS	WATTS	DCVA	1/2"
6	04/16/15	1182 SOUTHVIEW DR SE	PASS	WATTS	RP	1/2"
7	04/16/15	550 SPRUCE WAY SE	REPAIR	WATTS	RP	1/2"
8	04/16/15	550 SPRUCE WAY SE	REPLACE	WATTS	RP	1/2"
9	04/16/15	2248 SOUTHVIEW DR SE	PASS	WATTS	DCVA	1"
10	04/16/15	2248 SOUTHVIEW DR SE	PASS	WATTS	DCVA	2"
11	04/16/15	2248 SOUTHVIEW DR SE	PASS	WATTS	DCVA	2"
12	04/15/15	2500 BOX SPRINGS BLVD	PASS	WATTS	DCVA	2"
13	04/15/15	2500 BOX SPRINGS BLVD	REPLACE	WATTS	DCVA	2"
14	04/14/15	1288 Brier Park Rd. NW	PASS	WATTS	DCVA	1"
15	04/14/15	1288 Brier Park Rd. NW	PASS	WATTS	DCVA	1"

Notes:

Subset Of Records

Your list will now only contain the records highlighted.

Here you can run a report or export the list.

The screenshot shows the 'Equip History Log' window with 13 records displayed. The records are as follows:

#	Event Date	Service Address	Code	Mfr	Type	Size
1	04/16/15	1182 SOUTHVIEW DR SE	FAIL	WATTS	DCVA	4"
2	04/14/15	1288 Brier Park Rd. NW	PASS	WATTS	DCVA	1"
3	04/15/15	2500 BOX SPRINGS BLVD	PASS	WATTS	DCVA	2"
4	04/16/15	2248 SOUTHVIEW DR SE	PASS	WATTS	DCVA	2"
5	04/16/15	2248 SOUTHVIEW DR SE	PASS	WATTS	DCVA	2"
6	04/16/15	2248 SOUTHVIEW DR SE	PASS	WATTS	DCVA	1"
7	04/16/15	1182 SOUTHVIEW DR SE	PASS	WATTS	RP	1/2"
8	04/16/15	1182 SOUTHVIEW DR SE	PASS	WATTS	DCVA	1/2"
9	04/16/15	1182 SOUTHVIEW DR SE	PASS	WATTS	DCVA	4"
10	04/16/15	1182 SOUTHVIEW DR SE	PASS	WATTS	DCVA	2"
11	04/16/15	550 SPRUCE WAY SE	REPAIR	WATTS	RP	1/2"
12	04/15/15	2500 BOX SPRINGS BLVD	REPLACE	WATTS	DCVA	2"
13	04/16/15	550 SPRUCE WAY SE	REPLACE	WATTS	RP	1/2"

Notes:



XC2 User Manual

XC2 Kiosk

- **How To Use XC2's Kiosk**
- **Saved Searches**
- **Quick Lookups**
- **Exports**
- **Reports**
- **List Views**



XC2 Software Knowledge Base



How to use XC2's Kiosk

KB Asset ID: 3502

This page describes how to use XC2 Kiosk

XC2's Kiosk is located in the top left corner of the Main Page.

XC2's Kiosk is essentially a pulldown menu containing a variety of tools that can be accessed from the main page.

The following sections will go over XC2's Kiosk and describe its uses.

The screenshot shows the XC2 software interface. At the top, there is a title bar with the text "XC2 Software - BFP : * Facility: 92 of 92 Records : Multi-Line : WEB SERVER ON : 80 : WEB BFP Test". Below the title bar is a menu bar with options: "User Options", "Add", "Delete", "Find", "Sort", "Show All", "Export", "Saved Search", and "Report".

On the left side, there is a sidebar menu. The "Main Page Functions" section is highlighted with a red box and contains the following items:

- Saved Searches
- Quick Lookups
- Exports
- Reports
- List Views
- Special Functions
- Resources and Pick Lists

Below this are sections for "Modification History", "Administrator Preferences", and "Display Associated Surveys". Further down is a "Favorite Tasks" section with a list of tasks: "Facility List", "BFP Assembly List", "BFP Testers List", "Tester Company List", "Test Kits List", and "Test History".

The main area of the interface displays a table of facilities. The table has the following columns: "#", "Facility Name", "Addr (#)", "Street", "Site Qty", "Sched Code", and "Iext". The data in the table is as follows:

#	Facility Name	Addr (#)	Street	Site Qty	Sched Code	Iext
1	1T-M SERVICE CO	1328	DOGWOOD		05-May	
2	TAYLORS LIQUORS CHANGE	445	PERKINS		01-Jan	
3	LA SALLE PARTNERS	5622	STERLING GLEN		02-Feb	
4	LAMAR VENTURES	2941	ADARA		12-Dec	
5	MIDWEST SALES CO	4557	FRANK		02-Feb	
6	METRO DISHWASHER	3557	LAWTON		09-Sep	
7	BOB O'S BBQ					
8	BURGER SHACK	123	MAIN			
9	FLEABOTTOM ENTERPRISES	400	MOLLALA		MAR	
10	MCDONALDS				12-Dec	
11	SEARS J L & ASSOCIATES REAL ESTATE - CHAN	7323	FAIRWAY		08-Aug	
12	TEST FACILITY	123	BOGUS			
				118		

At the bottom of the interface, there is a "Customize Favorite Tasks" section and a "Selection ..." dropdown. Below that are checkboxes for "Filter On" and "Filter Facilities w/out Backflow". On the right side, there are buttons for "Send Notice", "Enter Survey", "Enter Test", and "Exit XC2".

Notes:

Selecting Tool Sets

By clicking in the Kiosk's Pulldown Menu you can select a variety of Categories

These include

- Saved Searches
- Quick Lookups
- Exports
- Reports
- List Views
- Special Functions
- Resources and Pick List

The screenshot shows the XC2 Software interface. The title bar reads "XC2 Software - BFP : * Facility: 92 of 92 Records : Multi-Line : WEB SERVER ON : 80 : WEB BFP Test". The main window has a menu bar with "User Options", "Add", "Delete", "Find", "Sort", "Show All", "Export", "Saved Search", and "Report". Below the menu bar is a search bar with "Facility" and "92 of 92 Records" and a "Find: Facility Name" dropdown. The main area is a table with columns: #, Facility Name, Addr (#), Street, Site Qty, Sched Code, and Iext. The table contains 12 rows of facility data. A pulldown menu is open on the left, showing "Main Page Functions" with options: Saved Searches, Quick Lookups (highlighted), Exports, Reports, List Views, Special Functions, and Resources and Pick Lists. Below this are "Modification History", "Administrator Preferences", and "Display Associated Surveys". Further down is "Favorite Tasks" with a list: Facility List, BFP Assembly List, BFP Testers List, Tester Company List, Test Kits List, and Test History. At the bottom, there is a "Customize Favorite Tasks" section and a "Selection ..." dropdown with a "Filter On" checkbox. The bottom right has buttons for "Send Notice", "Enter Survey", "Enter Test", and "Exit XC2".

#	Facility Name	Addr (#)	Street	Site Qty	Sched Code	Iext
1	1T-M SERVICE CO	1328	DOGWOOD		05-May	
2	TAYLORS LIQUORS CHANGE	445	PERKINS		01-Jan	
3	LA SALLE PARTNERS	5622	STERLING GLEN		02-Feb	
4	LAMAR VENTURES	2941	ADARA		12-Dec	
5	MIDWEST SALES CO	4557	FRANK		02-Feb	
6	METRO DISHWASHER	3557	LAWTON		09-Sep	
7	BOB O'S BBQ					
8	BURGER SHACK	123	MAIN			
9	FLEABOTTOM ENTERPRISES	400	MOLLALA		MAR	
10	MCDONALDS				12-Dec	
11	SEARS J L & ASSOCIATES REAL ESTATE - CHAN	7323	FAIRWAY		08-Aug	
12	TEST FACILITY	123	BOGUS			
				118		

Notes:



XC2 Software Knowledge Base



Enhanced Saved Searches

KB Asset ID: 45

Create and/or initiate from Main Menu

Overview

Create and/or initiate from Main Menu Search on Related Tables
 e.g. search for Facility records based upon Backflow Record information

Main Page

1. Launch the Saved Search Editor

Main Screen

The screenshot shows the 'Main Screen' of the XC2 software. The window title is 'XC2 Software - BFP : City of Snoqualamish, WA : * Facility: 73 of 73 Records : Multi-Line'. The interface includes a top menu bar with options like 'Add', 'Delete', 'Find', 'Sort', 'Show All', 'Export', 'Saved Search', and 'Report'. Below this is a search bar with 'Find: Facility Name' and a 'Go!' button. The main area is a table with 73 records, showing columns for '#', 'Facility Name', 'Addr (#)', 'Street', 'Site Qty', 'Sched Code', 'Next Survey Date', 'Last Survey Date', and 'Acct Number'. A sidebar on the left contains a 'Saved Searches' dropdown and a list of search categories: 'Run Selected Search', '* Saved Search Mgr', 'Bfp - Commercial', 'Bfp - Hospital', 'Bfp - Residential', 'Fac - Commercial', 'Fac - Hospital', 'Fac - Residential', and 'Facilities With 2+'. Below these are buttons for 'Facility List', 'BFP Assembly List', 'Tester List', 'Company List', 'BFP History', 'Survey History', 'Notice Setup', 'Send Annual Notices', 'Automatic Reminders', 'Compliance Report', 'Administrator Setup', and 'Lookup/Setup Lists'. At the bottom, there are buttons for 'Send Notice', 'Enter Survey', 'Enter Test', and 'Exit XC2'. A red arrow points from the 'Run Selected Search' button in the sidebar to the table.

#	Facility Name	Addr (#)	Street	Site Qty	Sched Code	Next Survey Date	Last Survey Date	Acct Number
1	Seniors in Community Living Inc	9095	Greyson	2	05-May	02/16/2011	02/16/2009	8767-000
2	Littleton Garage Door Service	6669	Scottwood	1	01-Jan	06/01/2014	06/01/2009	21739-0
3	Rainbow Rebuilders	6694	Abbotsford	2	01-Jan	12/22/2011	12/22/2010	22096-000
4	Storewise Software Inc	5038	Somerset	2	11-Nov	02/13/2013	02/13/2008	22782-000
5	Lakewood Family Medical Clinic Pc	7846	Champions	1	01-Jan	12/21/2015	12/21/2010	22782-000
6	Polymedica Industries Inc	2672	Hornsea	1	05-May	04/04/2011	04/04/2006	5081-000
7	Sheridan Sanitation District #2	7022	Ryan Meadow	1	03-Mar	03/08/2013	03/08/2008	5644-000
8	Peck Doran P C	1556	Inverness	1	06-Jun	02/17/2011	02/17/2006	5684-000
9	T-M Service CO	1328	Dogwood	1	05-May	01/18/2013	01/18/2008	6669-000
10	Mex Imports	6471	Chant	1	12-Dec	01/06/2013	01/06/2008	7280-000
11	Tafoya Electric	1795	Church View	1	05-May	08/02/2011	08/02/2004	7281-000
12	Taylor's Liquors	445	Perkins	1	01-Jan	07/08/2012	07/08/2007	8070-000
13	North Star Liquor	7698	Hunters	1	04-Apr		04/18/2002	22403-000
14	LA Salle Partners	5622	Sterling Glen	1	02-Feb	03/06/2013	03/06/2008	8087-000
15	Screenplay Video Centers	7805	Archer	1	11-Nov		11/16/2003	8403-000
16	Willie's Place	8488	Strathmoore	1	11-Nov	02/09/2013	02/09/2008	8415-000
17	Malecall II	9044	Kelsey	1	12-Dec	11/29/2016	11/29/2011	8430-000
18	World Computer Corporation	7816	Yankee	1	02-Feb	11/03/2012	11/03/2007	8561-000
19	Specialty Systems	785	Wallsend	1	05-May		05/22/2003	8795-000
20	Marco William Incorporated	5707	Chatham	1	04-Jan	02/22/2012	02/22/2008	8804-000

Notes:

Design Your Search

2. Design Your Search Parameters

Saved Search Setup Page

System ID: 10000021

Saved Search Name: Assemblies Tested Last 30 Days

Results Table: BFP Assembly | Last Date Used: | Records:

Description: Assemblies Tested Last 30 Days

Display in List View: Default

Created: Demo : 2013-05-21T09:10:44 | Modified:

!	Search Field	Operator	Value	Date Mod
◆	[BFP Assembly]Last Test Date	Is Greater Than or Equal to	^-1M -1 Month*	

Buttons: Add Search Item, Delete Search Item, Select a Field to Search, Duplicate this Saved Search, Exclude Inactive Records, Save To File, Run This Search Now, Must Match All Above Criteria, May Match Any of Above Criteria, Cancel, Save

Notes:

You new saved search is now available

3. Double Click to Run Your Saved Search

Saved Search Selection List

The screenshot displays the 'Saved Search Selection List' for 'BFP History' in the XC2 Software. The interface includes a menu on the left with 'BFP History' selected, a main data table with columns for Event Date, Service Address, Code, Mfr, Type, Size, Serial Num, and various PSID values, and a toolbar at the bottom with buttons like 'Send Notice', 'Enter Survey', 'Enter Test', and 'Exit XC2'.

#	Event Date	Service Address	Code	Mfr	Type	Size	Serial Num	Init CV1 PSID	Init CV2 PSID	Init RP RV PSID
1	04/22/2013	5408 FAWN LAKE CT	PASS	WATTS	DC	1"	220507	6.50	3.10	
2	04/22/2013	5712 OAK LAKE TRL	PASS	WILKINS	RP	1"	1381018	6.50	3.20	2.10
3	03/27/2013	3626 SUPREME CT	PASS	AMES	DC-NT	3/4"	11111	6.50	3.20	
4	03/27/2013	3626 SUPREME CT	PASS	AMES	DC-NT	3/4"	11111	6.54	3.20	
5	03/26/2013	99999 Test Street Name	FAIL	WATTS	RP	2"	SN99999999			
6	02/06/2013	1610 CHERRY LAKE WAY	PASS	FLOMATIC	DC	1"	A7282	1.80	1.80	
7	02/06/2013	1606 CHERRY LAKE WAY	PASS	WATTS	DC	1"	207315	2.40	2.20	
8	02/06/2013	1597 CHERRY LAKE WAY	PASS	FLOMATIC	DC	1"	A2863	2.00	2.60	
9	02/06/2013	1602 CHERRY LAKE WAY	PASS	WILKINS	DC	1"	1206676	2.80	2.40	
10	02/06/2013	1590 CHERRY LAKE WAY	PASS	WATTS	DC	1"	208451	2.40	2.00	
11	02/06/2013	1601 CHERRY LAKE WAY	PASS	WATTS	RP	1"	214690	8.80	1.80	2.40
12	02/06/2013	1605 CHERRY LAKE WAY	PASS	WILKINS	DC	1"	1132127	2.40	2.60	
13	02/06/2013	1609 CHERRY LAKE WAY	PASS	WILKINS	DC	1"	2296950	3.80	2.60	
14	02/06/2013	1613 CHERRY LAKE WAY	PASS	FLOMATIC	DC	1"	A6896	1.60	2.60	
15	02/06/2013	1617 CHERRY LAKE WAY	PASS	WILKINS	DC	1"	1278585	3.40	2.40	
16	02/06/2013	1577 CHERRY LAKE WAY	PASS	WILKINS	DC	1"	1047834	2.60	2.40	
17	02/06/2013	1573 CHERRY LAKE WAY	PASS	WATTS	DC	1"	209553	2.20	2.00	
18	02/06/2013	1581 CHERRY LAKE WAY	PASS	WILKINS	DC	1"	1244951	2.60	3.00	

Notes:



XC2 Software Knowledge Base



Quick Lookups

KB Asset ID: 2202

The Quick Lookup feature makes checking for important items and dates as easy as clicking a button.

Quick Lookup items include:

- Overdue Notices
- Overdue Tests
- Failed Assemblies
- Tests Due
- Tester Certifications Due
- Surveys Due
- and More!

Quick Lookups can be accessed directly from the Main Page

The screenshot shows the XC2 Software interface for BFP Assembly. The 'Quick Lookups' menu is open, highlighting several options. A callout box labeled 'XC2 Quick Lookups' points to the menu items. The main data table displays a list of BFP Assembly records with columns for #, Last Letter Date, Active, Facility Name, Last Stat, Addr (#), Street, and Next Test.

#	Last Letter Date	Active	Facility Name	Last Stat	Addr (#)	Street	Next Test
1	02/01/2011	✓	29TH AVE LIQUOR	PASS	4880	BEECH RIDGE	08/01/2012
	12/04/2013	✓	A FLAG HOUSE	PASS	1583	KIM	12/31/2010
3			SERVICE	PASS	7704	QUARTER	11/30/2011
4			ACADEMY VETERINARY SERVICE	PASS	7704	QUARTER	08/01/2012
5	05/13/2013	✓	ACADEMY VETERINARY HOSPITA	FAIL/PAS	8350	LIGHTHOUSE	08/01/2012
6	08/01/2011	✓	ACADEMY VETERINARY HOSPITA	PASS	8350	LIGHTHOUSE	08/31/2012
7	01/17/2011	✓	ADVANTAGE BROKERS	PASS	5120	WEBB	12/31/2010
8	07/01/2011	✓	BETHESDA AT ST ANTHONY HOS	PASS	1802	WOODCREEK	07/31/2012
9	07/01/2011	✓	BETHESDA AT ST ANTHONY HOS	PASS	1802	WOODCREEK	07/31/2012
10	07/01/2011	✓	BETHESDA AT ST ANTHONY HOS	PASS	1802	WOODCREEK	07/31/2012
11	05/01/2011	✓	BOULDER MTN OVERCHARGE CL	PASS	7930	MAYS	04/30/2012
12	05/13/2013	✓	CHILDREN'S HOSPITAL	FAIL/PAS	1552	NAPLES NATIONAL	08/01/2012
13	04/01/2011	✓	CHILDREN'S HOSPITAL	PASS	1552	NAPLES NATIONAL	08/01/2012
14	04/01/2011	✓	CHILDREN'S HOSPITAL	PASS	1552	NAPLES NATIONAL	08/01/2012
15	10/01/2011	✓	ECHOSPHERE CORPORATION	PASS	7210	WEST VIEW	09/30/2012

Notes:

How to Access Quick Lookups

Quick Lookups can be accessed from the Main Screen pull-down menu in the upper left corner of the screen.

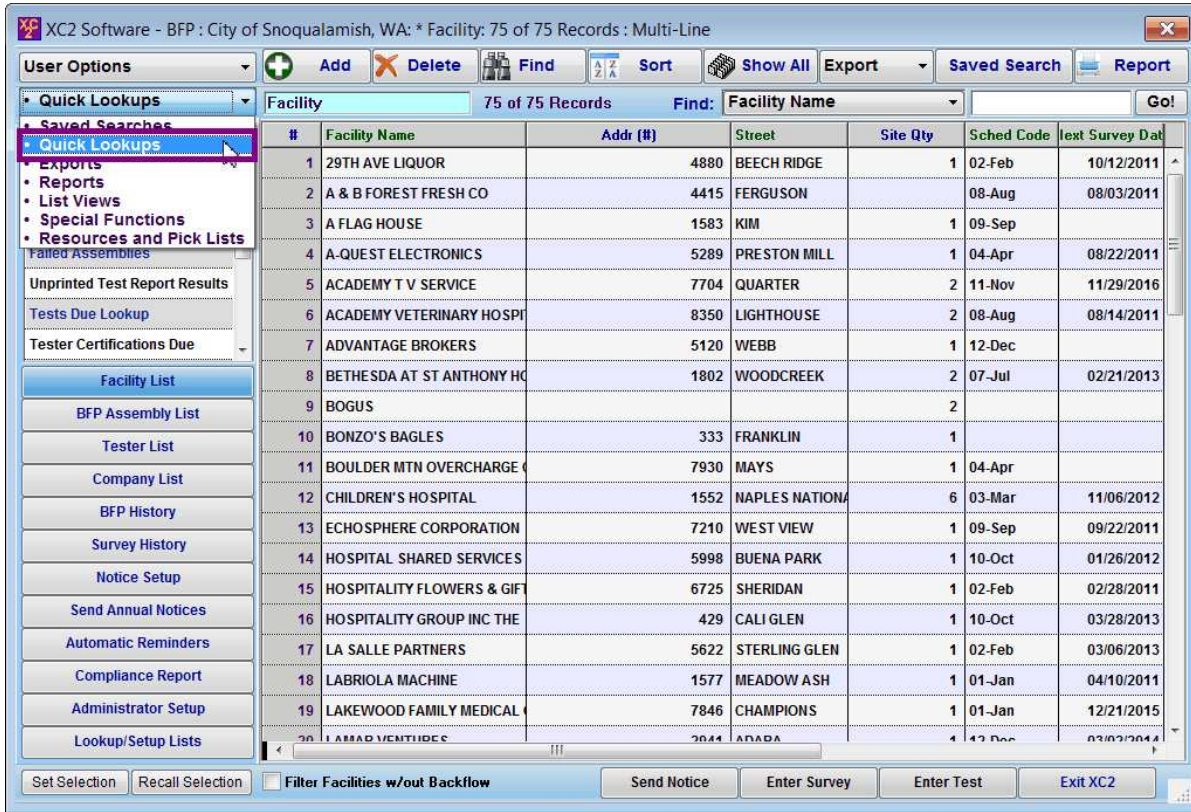
The screenshot displays the XC2 Software interface for the City of Snoqualamish, WA. The main window title is "XC2 Software - BFP : City of Snoqualamish, WA: * Facility: 75 of 75 Records : Multi-Line". The interface includes a top toolbar with buttons for "Add", "Delete", "Find", "Sort", "Show All", "Export", "Saved Search", and "Report". A "Quick Lookups" menu is open, showing a list of options including "Run Selected Lookup", "Automatic Reminders", "Overdue Notices", "Overdue Tests", "Failed Assemblies", "Unprinted Test Report Results", "Tests Due Lookup", "Tester Certifications Due", "Facility List", "BFP Assembly List", "Tester List", "Company List", "BFP History", "Survey History", "Notice Setup", "Send Annual Notices", "Automatic Reminders", "Compliance Report", "Administrator Setup", and "Lookup/Setup Lists". A red arrow points from the "Quick Lookups" menu to the "Facility List" option. Below the menu is a table of facilities with columns for "#", "Facility Name", "Addr (#)", "Street", "Site Qty", "Sched Code", and "Next Survey Date". The table contains 20 rows of data, including facilities like "29TH AVE LIQUOR", "A & B FOREST FRESH CO", "A FLAT HOUSE", "A-QUEST ELECTRONICS", "ACADEMY T V SERVICE", "ACADEMY VETERINARY HOSPITAL", "ADVANTAGE BROKERS", "BETHESDA AT ST ANTHONY HO", "BOGUS", "BONZO'S BAGLES", "BOULDER MTN OVERCHARGE C", "CHILDREN'S HOSPITAL", "ECHOSPHERE CORPORATION", "HOSPITAL SHARED SERVICES", "HOSPITALITY FLOWERS & GIF", "HOSPITALITY GROUP INC THE", "LA SALLE PARTNERS", "LABRIOLA MACHINE", "LAKEWOOD FAMILY MEDICAL C", and "LAMAR VENTURES". At the bottom of the interface, there are buttons for "Set Selection", "Recall Selection", "Filter Facilities w/out Backflow", "Send Notice", "Enter Survey", "Enter Test", and "Exit XC2".

#	Facility Name	Addr (#)	Street	Site Qty	Sched Code	Next Survey Date
1	29TH AVE LIQUOR	4880	BEECH RIDGE	1	02-Feb	10/12/2011
2	A & B FOREST FRESH CO	4415	FERGUSON		08-Aug	08/03/2011
3	A FLAT HOUSE	1583	KIM	1	09-Sep	
4	A-QUEST ELECTRONICS	5289	PRESTON MILL	1	04-Apr	08/22/2011
5	ACADEMY T V SERVICE	7704	QUARTER	2	11-Nov	11/29/2016
6	ACADEMY VETERINARY HOSPITAL	8350	LIGHTHOUSE	2	08-Aug	08/14/2011
7	ADVANTAGE BROKERS	5120	WEBB	1	12-Dec	
8	BETHESDA AT ST ANTHONY HO	1802	WOODCREEK	2	07-Jul	02/21/2013
9	BOGUS			2		
10	BONZO'S BAGLES	333	FRANKLIN	1		
11	BOULDER MTN OVERCHARGE C	7930	MAYS	1	04-Apr	
12	CHILDREN'S HOSPITAL	1552	NAPLES NATIONAL	6	03-Mar	11/06/2012
13	ECHOSPHERE CORPORATION	7210	WEST VIEW	1	09-Sep	09/22/2011
14	HOSPITAL SHARED SERVICES	5998	BUENA PARK	1	10-Oct	01/26/2012
15	HOSPITALITY FLOWERS & GIF	6725	SHERIDAN	1	02-Feb	02/28/2011
16	HOSPITALITY GROUP INC THE	429	CALI GLEN	1	10-Oct	03/28/2013
17	LA SALLE PARTNERS	5622	STERLING GLEN	1	02-Feb	03/06/2013
18	LABRIOLA MACHINE	1577	MEADOW ASH	1	01-Jan	04/10/2011
19	LAKEWOOD FAMILY MEDICAL C	7846	CHAMPIONS	1	01-Jan	12/21/2015
20	LAMAR VENTURES	2044	ADADA	4	12-Dec	03/02/2014

Notes:

Select Quick Lookups

In this pulldown menu, there are also other options that can be chosen. If Quick Lookups is not selected, click the pull-down menu and select Quick Lookups.



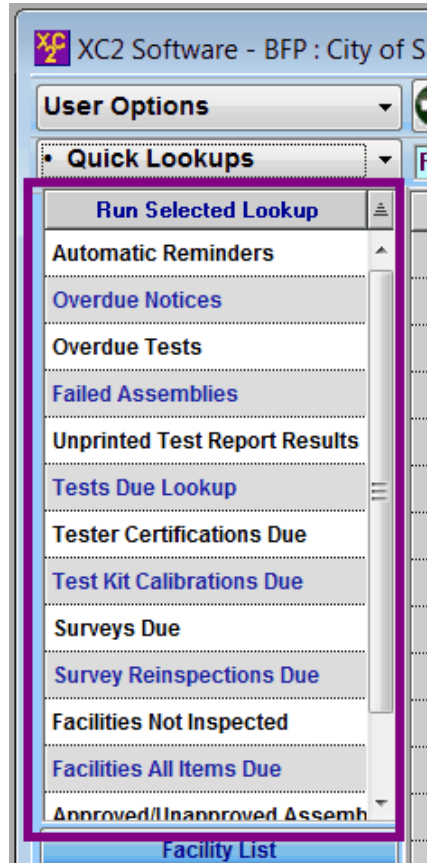
Notes:

Quick Lookup Items

When Quick Lookups is selected,

A variety of different lookup items will appear in a menu with a scroll bar.

To use these items, double click on the item you would like to view.



Notes:

Example 1

Below I have selected Overdue Tests Quick Lookup

After clicking on the Quick Lookup Option, the BFP Assembly List is selected and a list of all assemblies that are currently past their Test Due Date appeared in the Main Screen List View.

XC2 Software - BFP : City of Snoqualamish, WA: * BFP Assembly: 30 of 94 Records : Multi-Line

User Options: Add, Delete, Find, Sort, Show All, Export, Saved Search, Report

Quick Lookups: BFP Assembly, 30 of 94 Records, Find: Facility Name, Go!

Left Sidebar (Quick Lookups):

- Run Selected Lookup
- Automatic Reminders
- Overdue Notices
- Overdue Tests** (highlighted with a purple box and arrow)
- Failed Assemblies
- Unprinted Test Report Results
- Tests Due Lookup
- Tester Certifications Due
- Facility List
- BFP Assembly List** (highlighted with a purple box)
- Tester List
- Company List
- BFP History
- Survey History
- Notice Setup
- Send Annual Notices
- Automatic Reminders
- Compliance Report
- Administrator Setup
- Lookup/Setup Lists

#	Last Letter Date	Active	Facility Name	Last Stat	Addr (#)	Street	Next Test
1		✓	SENIORS IN COMMUNITY LIVING I	PASS	9095	GREYSON	01/01/2012
2	01/01/2011	✓	RAINBOW REBUILDERS	PASS	123	WEST	01/31/2012
3	11/01/2011	✓	STOREWISE SOFTWARE INC	PASS	5038	SOMERSET	08/01/2012
4	06/16/2011	✓	POLYMEDICA INDUSTRIES INC	PASS	2672	HORNSEA	05/31/2012
5		✓	MEX IMPORTS	PASS	6471	CHANT	12/31/2011
6	03/25/2011	✓	TAYLORS LIQUORS	PASS	445	PERKINS	08/01/2012
7	04/01/2011	✓	NORTH STAR LIQUOR	PASS	7698	HUNTERS	04/30/2012
8	02/01/2011	✓	WORLD COMPUTER CORPORAT	PASS	7816	YANKEE	02/28/2012
9	06/16/2011	✓	SPECIALTY SYSTEMS	PASS	785	WALLSEND	05/31/2012
10	03/25/2011	✓	RILEY INCOME TAX SERVICE	PASS	1710	LIBERTY	01/31/2012
11	11/01/2011	✓	RESOLUTION TRUST CORP	FAIL/PAS	1905	HILLYER	08/01/2012
12	04/01/2011	✓	WEBER MANAGEMENT COMPAN	PASS	6679	CROSS CREEK	04/30/2012
13	12/01/2013	✓	MR SMITH'S RESTAURANT	PASS	4370	ROBIN HOOD	08/31/2012
14	03/01/2011	✓	PACIFIC JEWELRY & LOAN CO	PASS	2566	MAIN	03/31/2012
15	05/01/2011	✓	WORLD WIDE FUNDING	PASS	197	MAXWELL	05/31/2012

Bottom Buttons: Set Selection, Recall Selection, Exclude Inactive BFP Assembly Records, Send Notice, Enter Survey, Enter Test *, Exit XC2

Notes:



XC2 Software Knowledge Base



How to Create a New Export File

KB Asset ID: 2849

This page describes how to create and save a new export file that can be run multiple times.

Choose the correct list

Before creating the new export, you need to choose the correct list.

Here I want to export a list of Facility records so I selected the Facility List on the Main Page

The screenshot shows the XC2 software interface for 'City of Snoqualamish, WA'. The main window displays a table of 74 facility records. The sidebar on the left contains a menu with several options, and 'Facility List' is highlighted with a purple box. A callout box labeled 'Choose a List' points to this menu item. The table columns include Facility Name, Address, Street, Site Qty, Scheduled Code, Next Survey Date, and Last Survey Date.

#	Facility Name	Addr (#)	Street	Site Qty	Sched Code	Next Survey Date	Last Survey Date
	Sheridan Sanitation District #2	7022	Ryan Meadow	1	03-Mar	03/08/2013	03/08/200
	T-M Service CO	1328	Dogwood	1	05-May	02/17/2013	02/17/200
	Mex Imports	6471	Chant	2	12-Dec	01/06/2013	01/06/200
	Tafoya Electric	1795	Church View	1	05-May	08/02/2011	08/02/200
	Taylor's Liquors	445	Perkins	1	01-Jan	07/08/2012	07/08/200
	LA Salle Partners	5622	Sterling Glen	1	02-Feb	03/06/2013	03/06/200
	Screenplay Video Centers	7805	Archer	1	11-Nov		11/16/200
	Willie's Place	8488	Strathmoore	1	11-Nov	02/09/2013	02/09/200
	World Computer Co	7816	Yankee	1	02-Feb	11/03/2012	11/03/200
	Specialty Systems	785	Wallsend	1	05-May	05/22/2008	05/22/200
	Mercer William Incorporated	5707	Chatham	1	01-Jan	02/23/2013	02/23/200
	Sears, Roebuck & Associates Real Estate	7323	Fairway	1	08-Aug		08/24/200
	Lamar Ventures	2941	Adara	1	12-Dec	03/02/2014	03/02/200
	Midwest Sales CO	4557	Frank	1	02-Feb	04/25/2012	04/25/200
	A Flag House	1583	Kim	1	09-Sep	04/14/2015	04/14/201
	Riley Income Tax Service	1710	Liberty	1	01-Jan	04/26/2012	04/26/200
	Redding Equipment CO	2230	Vinmar	1	10-Oct	10/07/2011	10/07/200
	Rains-Flo Packings	5102	Clark-Shaw	1	12-Dec		11/15/200
	Weber Management Company	6679	Cross Creek	1	04-Apr	03/17/2013	03/17/200
	Mr. Smith's Restaurant	4270	Robin Hood	1	08-Aug	04/14/2015	04/14/201

Notes:

Export Manager

Under the pull-down menu, In the top left portion of the main page, select Exports

The screenshot shows the 'XC2 Software - BFP : City of Snoqualamish, WA: Facility: 74 of 74 Records : Multi-Line' window. The 'Exports' menu is open, listing options like 'Saved Searches', 'Quick Lookups', 'Exports', 'Reports', 'List Views', 'Special Functions', and 'Resources and Pick Lists'. The main table contains the following data:

#	Facility Name	Addr (#)	Street	Site Qty	Sched Code	Next Survey Date	Last Survey Date
6	Shelton Sanitation District #2	7022	Ryan Meadow	1	03-Mar	03/08/2013	03/08/200
7	T-M Service CO	1328	Dogwood	1	05-May	02/17/2013	02/17/200
8	Mex Imports	6471	Chant	2	12-Dec	01/06/2013	01/06/200
9	Tafoya Electric	1795	Church View	1	05-May	08/02/2011	08/02/200
10	Taylor's Liquors	445	Perkins	1	01-Jan	07/08/2012	07/08/200
11	LA Salle Partners	5622	Sterling Glen	1	02-Feb	03/06/2013	03/06/200
12	Screenplay Video Centers	7805	Archer	1	11-Nov		11/16/200
13	Willie's Place	8488	Strathmoore	1	11-Nov	02/09/2013	02/09/200
14	World Computer Corporation	7816	Yankee	1	02-Feb	11/03/2012	11/03/200
15	Specialty Systems	785	Wallsend	1	05-May	05/22/2008	05/22/200
16	Mercer William M Incorporated	5707	Chatham	1	01-Jan	02/23/2013	02/23/200
17	Sears J L & Associates Real Estate	7323	Fairway	1	08-Aug		08/24/200
18	Lamar Ventures	2941	Adara	1	12-Dec	03/02/2014	03/02/200
19	Midwest Sales CO	4557	Frank	1	02-Feb	04/25/2012	04/25/200
20	A Flag House	1583	Kim	1	09-Sep	04/14/2015	04/14/201
21	Riley Income Tax Service	1710	Liberty	1	01-Jan	04/26/2012	04/26/200
22	Redding Equipment CO	2230	Vinmar	1	10-Oct	10/07/2011	10/07/200
23	Rains-Flo Packings	5102	Clark-Shaw	1	12-Dec		11/15/200
24	Weber Management Company	6679	Cross Creek	1	04-Apr	03/17/2013	03/17/200
25	Mr Smith's Restaurant	4270	Robin Hood	1	08-Aug	04/14/2015	04/14/200

Notes:

Select Create New Export

The screenshot shows the XC2 Software interface for 'City of Snoqualamish, WA'. The main window displays a list of 74 facilities. On the left, there is a sidebar menu under 'Exports' with 'Create New Export' highlighted in a red box. A red arrow points from this menu item to the first row of the facility list. The facility list has columns for Facility #, Facility Name, Address, Street, Site Qty, Scheduled Code, Next Survey Date, and Last Survey Date.

#	Facility Name	Addr (#)	Street	Site Qty	Sched Code	Next Survey Date	Last Survey Date
6	Sheridan Sanitation District #2	7022	Ryan Meadow	1	03-Mar	03/08/2013	03/08/200
7	T-M Service CO	1328	Dogwood	1	05-May	02/17/2013	02/17/200
8	Mex Imports	6471	Chant	2	12-Dec	01/06/2013	01/06/200
9	Tafoya Electric	1795	Church View	1	05-May	08/02/2011	08/02/200
10	Taylor's Liquors	445	Perkins	1	01-Jan	07/08/2012	07/08/200
11	LA Salle Partners	5622	Sterling Glen	1	02-Feb	03/06/2013	03/06/200
12	Screenplay Video Centers	7805	Archer	1	11-Nov		11/16/200
13	Willie's Place	8488	Strathmoore	1	11-Nov	02/09/2013	02/09/200
14	World Computer Corporation	7816	Yankee	1	02-Feb	11/03/2012	11/03/200
15	Specialty Systems	785	Wallsend	1	05-May	05/22/2008	05/22/200
16	Mercer William M Incorporated	5707	Chatham	1	01-Jan	02/23/2013	02/23/200
17	Sears J L & Associates Real Estate	7323	Fairway	1	08-Aug		08/24/200
18	Lamar Ventures	2941	Adara	1	12-Dec	03/02/2014	03/02/200
19	Midwest Sales CO	4557	Frank	1	02-Feb	04/25/2012	04/25/200
20	A Flag House	1583	Kim	1	09-Sep	04/14/2015	04/14/201
21	Riley Income Tax Service	1710	Liberty	1	01-Jan	04/26/2012	04/26/200
22	Redding Equipment CO	2230	Vinmar	1	10-Oct	10/07/2011	10/07/200
23	Rains-Flo Packings	5102	Clark-Shaw	1	12-Dec		11/15/200
24	Weber Management Company	6679	Cross Creek	1	04-Apr	03/17/2013	03/17/200
25	Mr Smith's Restaurant	4270	Robin Hood	1	08-Aug	04/14/2015	04/14/201

Notes:

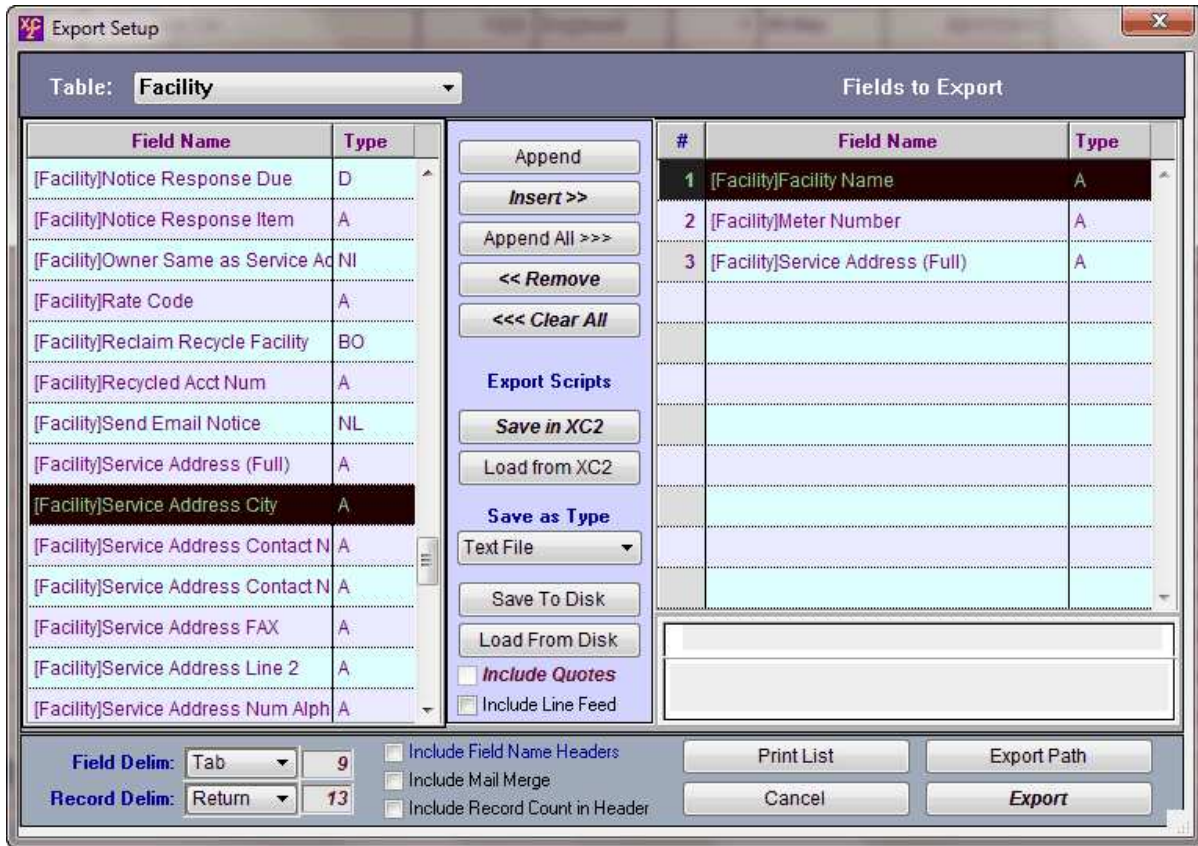
Select Fields to Export

Next select the fields to export.

Double click the fields on the left to add them to the export file.

All fields on the right will be exported.

Note: If you would like to change the export order, you may move the fields around on the right by clicking them and dragging up or down

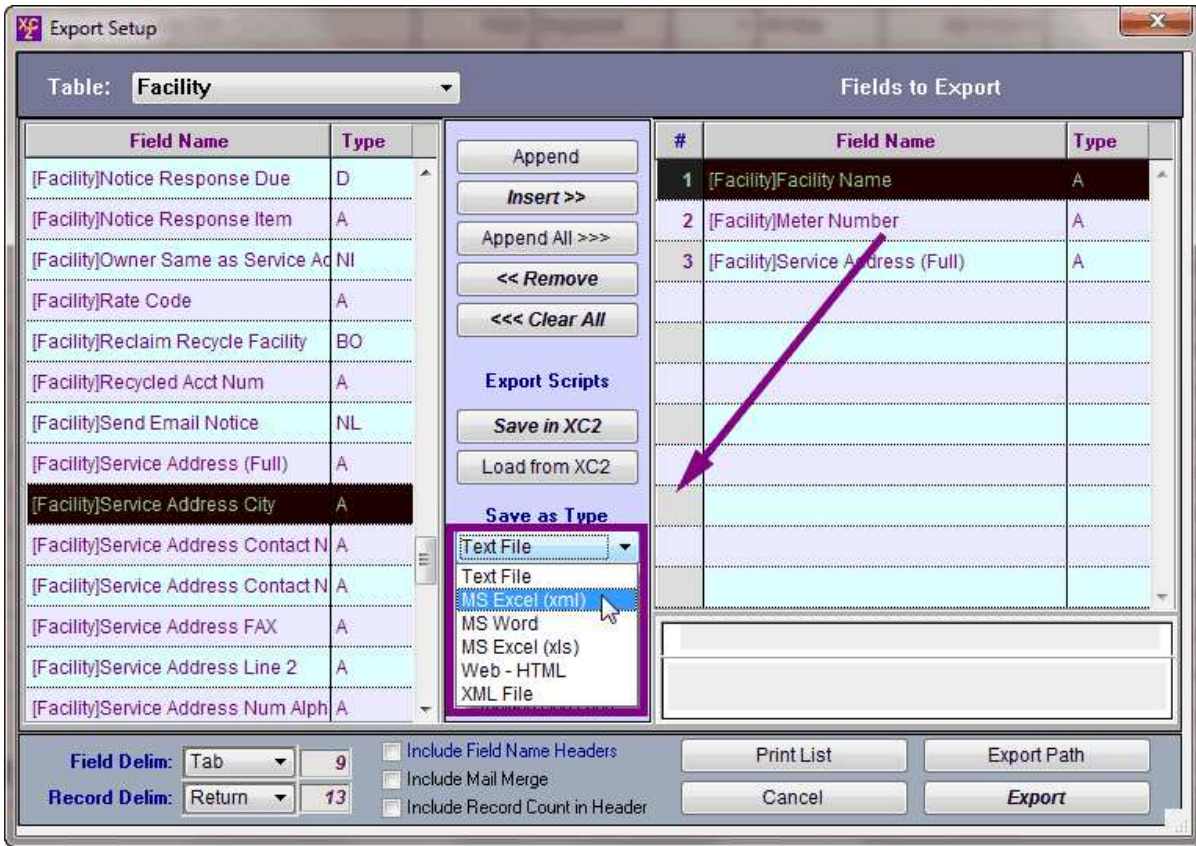


Notes:

Select File Type

Select the file type.

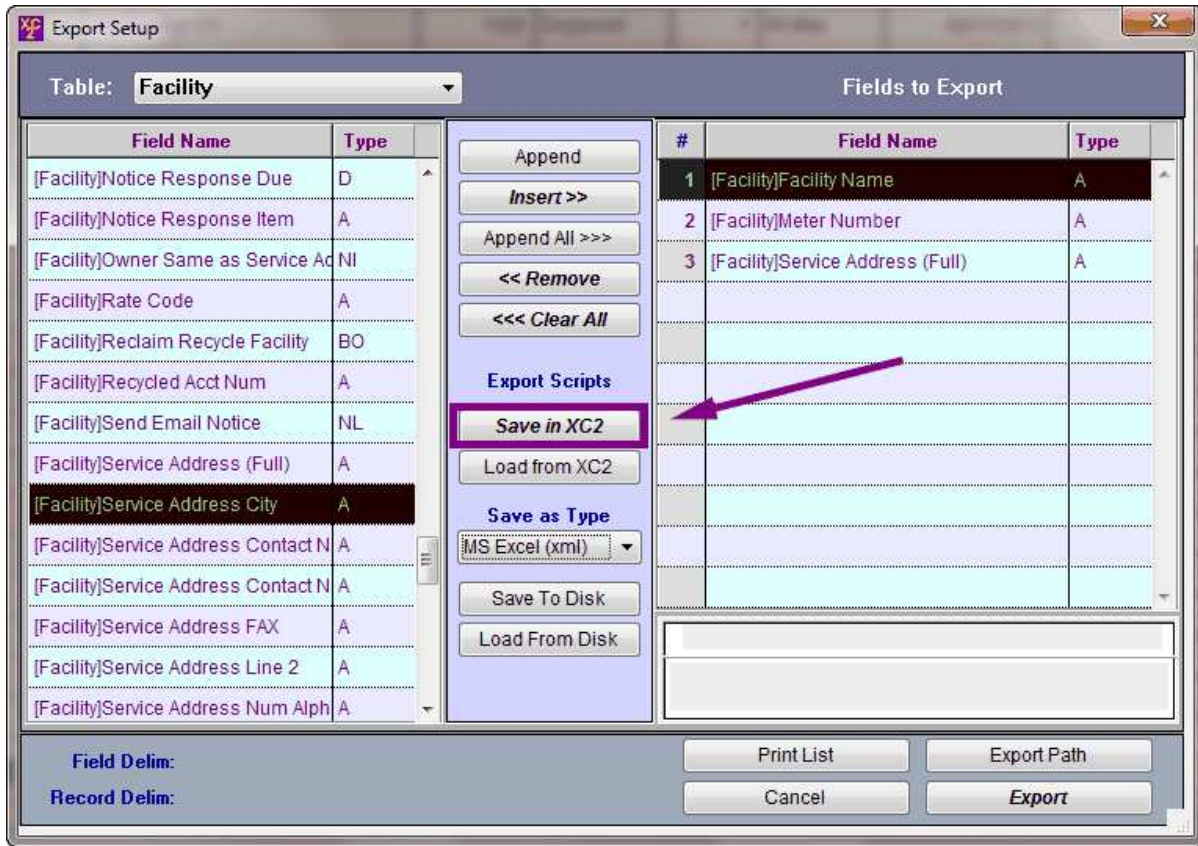
Here I selected an Excel file type



Notes:

Save Export

When you are done creating the Export File, save the export by clicking Save in XC2



Notes:

Give The Export a Name

Name the export and click Save

Export Scripts

Saved Scripts: Export IMPORT/EXPORT.02

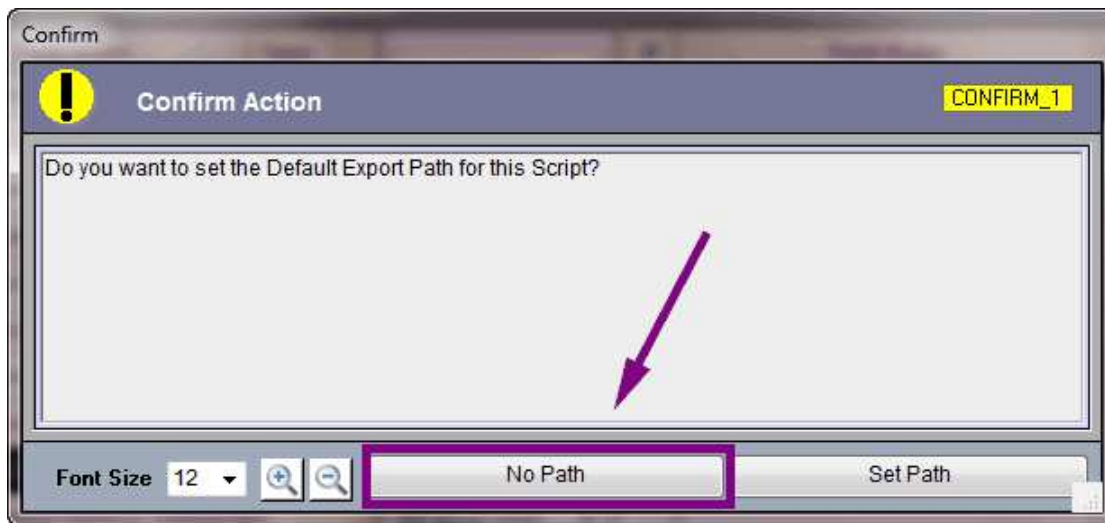
Script Name

Saved Name	Last Saved Date	Next Scheduled Date	Last Saved By

Notes:

Do not save export path

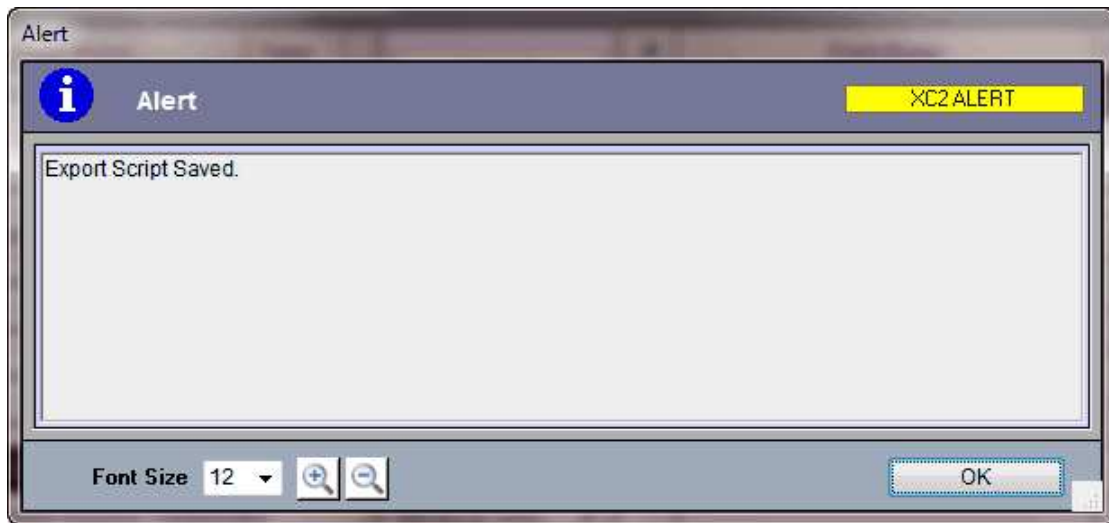
This is used on different occasions. Click No Path to continue



Notes:

Click OK

Click Ok to Confirm

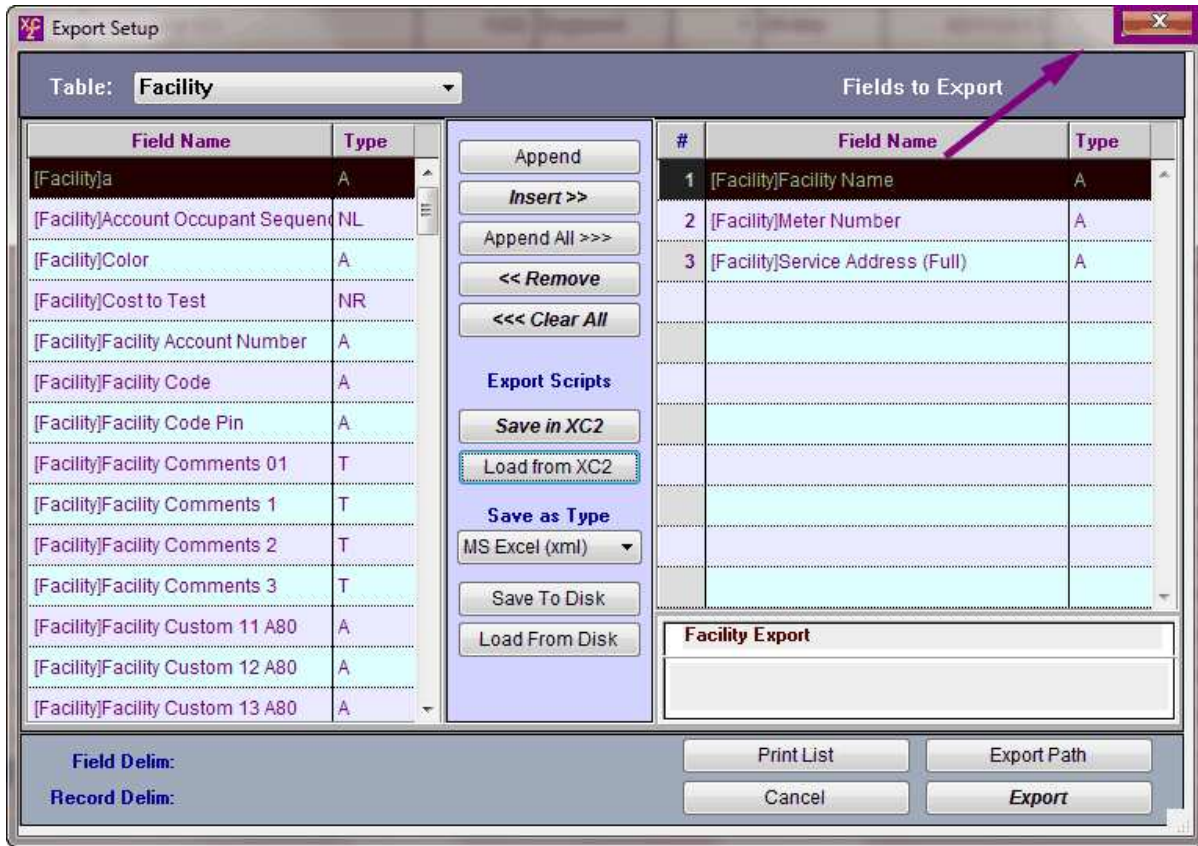


Notes:

You are Finished

You are now finished creating the export.

Click the red X to close the export manager.

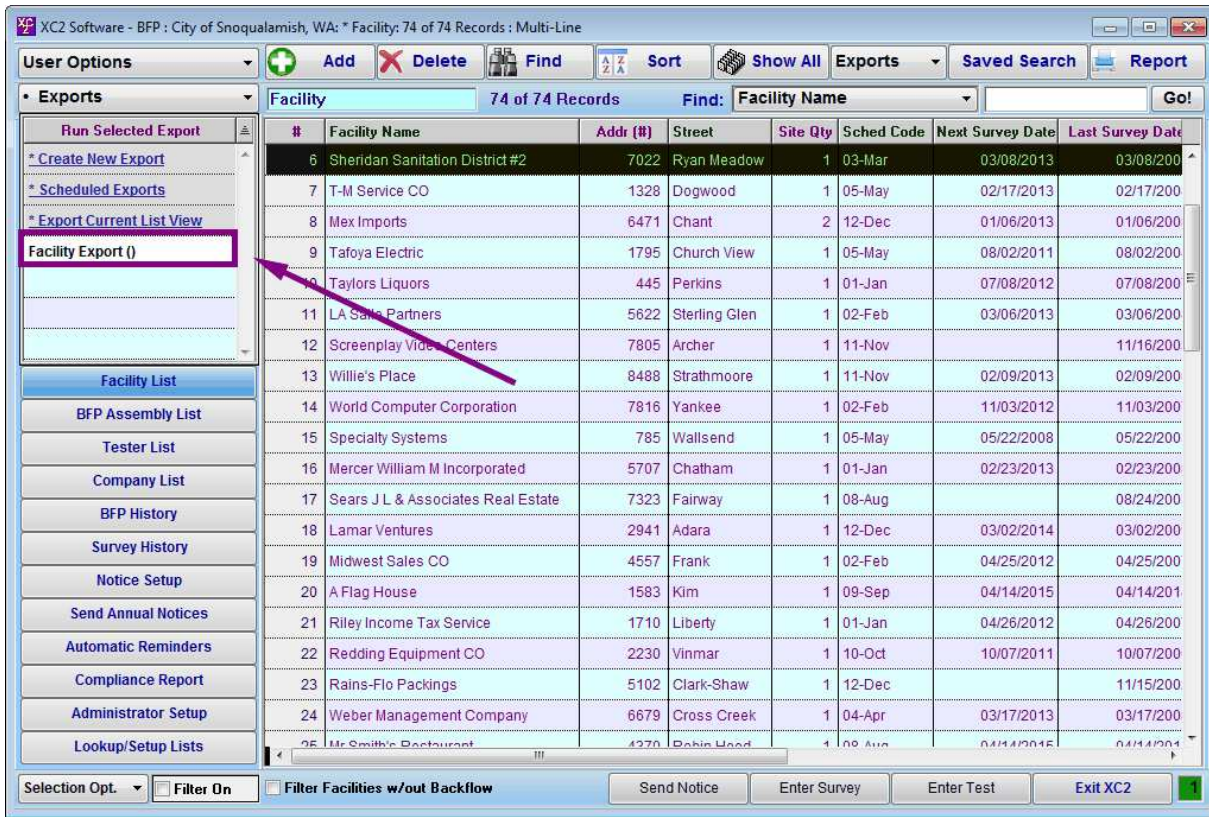


Notes:

Easy access to Export

Now after you have created your export you can quickly run the export as many times you like.

To run the export, simply double click on the script, save the file and everything in your list will export.



Notes:



XC2 Software Knowledge Base



Kiosk - Reports

KB Asset ID: 3510

This Page Gives an overview of the reports area in XC2

Reports

All Reports can be access from XC2 Kiosk.

There are many options and reports to choose and this guide will go into reporting a little deeper later.

Some of these reports include

- Program Analytics Reports
- Exporting List Views
- Compliance Reports

The screenshot shows the XC2 Software interface. The main window displays a table of facilities with columns: #, Facility Name, Addr (#), Street, Site Qty, Sched Code, and text. The table contains 12 rows of data, with the 6th row (METRO DISHWASHER) highlighted in blue. The sidebar on the left has a 'Run Selected Report' section with options: Print Current List View, Export Current List View, Print Current List Options, Program Analytics Reports (highlighted), Compliance Reports, and Compliance Report Detail. Below this is a 'Favorite Tasks' section with options: Facility List, BFP Assembly List, BFP Testers List, Tester Company List, Test Kits List, and Test History. The bottom of the window has a 'Selection ...' dropdown, a 'Filter On' checkbox, a 'Filter Facilities w/out Backflow' checkbox, and buttons for 'Send Notice', 'Enter Survey', 'Enter Test', and 'Exit XC2'.

#	Facility Name	Addr (#)	Street	Site Qty	Sched Code	text
1	1T-M SERVICE CO	1328	DOGWOOD		05-May	
2	TAYLORS LIQUORS CHANGE	445	PERKINS		01-Jan	
3	LA SALLE PARTNERS	5622	STERLING GLEN		02-Feb	
4	LAMAR VENTURES	2941	ADARA		12-Dec	
5	MIDWEST SALES CO	4557	FRANK		02-Feb	
6	METRO DISHWASHER	3557	LAWTON		09-Sep	
7	BOB O'S BBQ					
8	BURGER SHACK	123	MAIN			
9	FLEABOTTOM ENTERPRISES	400	MOLLALA		MAR	
10	MCDONALDS				12-Dec	
11	SEARS J L & ASSOCIATES REAL ESTATE - CHAN	7323	FAIRWAY		08-Aug	
12	TEST FACILITY	123	BOGUS			
				118		

Notes:



How to Create a Custom List View

KB Asset ID: 2260

This page describes how to customize list views in XC2

What is a List View?

A list view is a collection of data organized into rows and columns that represents a specific table in XC2.

Below we are looking at a List View of the Facility Table.

Here a collection of facilities is organized into rows, and a collection of information related to these facilities is organized into columns. Together they represent one List View.

In XC2 you can create multiple List Views and access each list by the click of a button.

#	Facility Name	Service Address	Service Addr	Site Qty	*
1	BOGUS			2	*
2	BONZO'S BAGLES	333 FRANKLIN AVE	87562	1	*
3	LITTLE CEASARS PIZZA	122 TAYLOR DR	94930	1	*
4	SENIORS IN COMMUNITY LIVING INC	9095 S GREYSON DR	98215	2	*
5	LITTLETON GARAGE DOOR SERVICE	6669 S SCOTTWOOD CT	98215	2	*
6	RAINBOW REBUILDERS	6694 S ABBOTSFORD WAY	98215	2	*
7	STOREWISE SOFTWARE INC	907 W A ST	98215	2	*
8	LAKEWOOD FAMILY MEDICAL CLINIC PC	7846 CHAMPIONS CT AS	98215	1	*
9	POLYMEDICA INDUSTRIES INC	2672 N HORNSEA DR	98215	1	*
10	SHERIDAN SANITATION DISTRICT #2	7022 N RYAN MEADOW PL	98215		*
11	PECK DORAN P C	1556 N INVERNESS ST	98215	1	*
12	T-M SERVICE CO	1328 S DOGWOOD LN	98215	1	*
13	MEX IMPORTS	6471 S CHANT CT	98215	1	*
14	TAFOYA ELECTRIC	1795 S CHURCH VIEW CT	98215	1	*
15	TAYLORS LIQUORS	445 S PERKINS LN	98215	1	*
16	NORTH STAR LIQUOR	7698 E HUNTERS ST	98215	1	*
17	LA SALLE PARTNERS	5622 E STERLING GLEN DR	98215	1	*
18	SCREENPLAY VIDEO CENTERS	7805 S ARCHER LN	98215	1	*
19	WILLIE'S PLACE	8488 S STRATHMOORE RD	98215	1	*
20	MALECALL II	8844 S KEL SEV CT	98215	4	*

Notes:

Create a New List

To create a new List View, select List Views from the pulldown menu in the upper left corner of the Main Screen.

The screenshot shows the XC2 Software interface for BFP in Snoqualamish, WA. The main window displays a table of 75 facilities. On the left, a 'List Views' menu is open, highlighting the 'List Views' option. The table below shows the following data:

#	Facility Name	Service Address	Service Addr	Site Qty	*
1	BOGUS			2	*
2	BONZO'S BAGLES	333 FRANKLIN AVE	87562	1	*
3	LITTLE CEASARS PIZZA	122 TAYLOR DR	94930	1	*
4	SENIORS IN COMMUNITY LIVING INC	9095 S GREYSON DR	98215	2	*
5	LITTLETON GARAGE DOOR SERVICE	6669 S SCOTTWOOD CT	98215	2	*
6	RAINBOW REBUILDERS	6694 S ABBOTSFORD WAY	98215	2	*
7	STOREWISE SOFTWARE INC	907 W A ST	98215	2	*
8	LAKEWOOD FAMILY MEDICAL CLINIC PC	7846 CHAMPIONS CT AS	98215	1	*
9	POLYMEDICA INDUSTRIES INC	2672 N HORNSEA DR	98215	1	*
10	SHERIDAN SANITATION DISTRICT #2	7022 N RYAN MEADOW PL	98215		*
11	PECK DORAN P C	1556 N INVERNESS ST	98215	1	*
12	T-M SERVICE CO	1328 S DOGWOOD LN	98215	1	*
13	MEX IMPORTS	6471 S CHANT CT	98215	1	*
14	TALOYA ELECTRIC	1795 S CHURCH VIEW CT	98215	1	*
15	TAYLORS LIQUORS	445 S PERKINS LN	98215	1	*
16	NORTH STAR LIQUOR	7698 E HUNTERS ST	98215	1	*
17	LA SALLE PARTNERS	5622 E STERLING GLEN DR	98215	1	*
18	SCREENPLAY VIDEO CENTERS	7805 S ARCHER LN	98215	1	*
19	WILLIE'S PLACE	8488 S STRATHMOORE RD	98215	1	*
20	MALECALI B	6044 S KEL SEV CT	98215	1	*

Notes:

New List View

Next, select New List View in the upper left corner of the Main Screen.

The screenshot shows the XC2 Software interface for the City of Snoqualamish, WA. The main window displays a list of 75 facilities. The left-hand menu is open, and the 'New List View' option is highlighted with a red box. The main table contains the following data:

#	Facility Name	Service Address	Service Addr	Site Qty	*
1	BOGUS			2	*
2	BONZO'S BAGLES	333 FRANKLIN AVE	87562	1	*
3	LITTLE CEASARS PIZZA	122 TAYLOR DR	94930	1	*
4	SENIORS IN COMMUNITY LIVING INC	9095 S GREYSON DR	98215	2	*
5	LITTLETON GARAGE DOOR SERVICE	6669 S SCOTTWOOD CT	98215	2	*
6	RAINBOW REBUILDERS	6694 S ABBOTSFORD WAY	98215	2	*
7	STOREWISE SOFTWARE INC	907 W A ST	98215	2	*
8	LAKEWOOD FAMILY MEDICAL CLINIC PC	7846 CHAMPIONS CT AS	98215	1	*
9	POLYMEDICA INDUSTRIES INC	2672 N HORNSEA DR	98215	1	*
10	SHERIDAN SANITATION DISTRICT #2	7022 N RYAN MEADOW PL	98215		*
11	PECK DORAN P C	1556 N INVERNESS ST	98215	1	*
12	T-M SERVICE CO	1328 S DOGWOOD LN	98215	1	*
13	MEX IMPORTS	6471 S CHANT CT	98215	1	*
14	TALOYA ELECTRIC	1795 S CHURCH VIEW CT	98215	1	*
15	TAYLORS LIQUORS	445 S PERKINS LN	98215	1	*
16	NORTH STAR LIQUOR	7698 E HUNTERS ST	98215	1	*
17	LA SALLE PARTNERS	5622 E STERLING GLEN DR	98215	1	*
18	SCREENPLAY VIDEO CENTERS	7805 S ARCHER LN	98215	1	*
19	WILLIE'S PLACE	8488 S STRATHMOORE RD	98215	1	*
20	MALECALI B	6044 S KELSEY CT	98215	1	*

Notes:

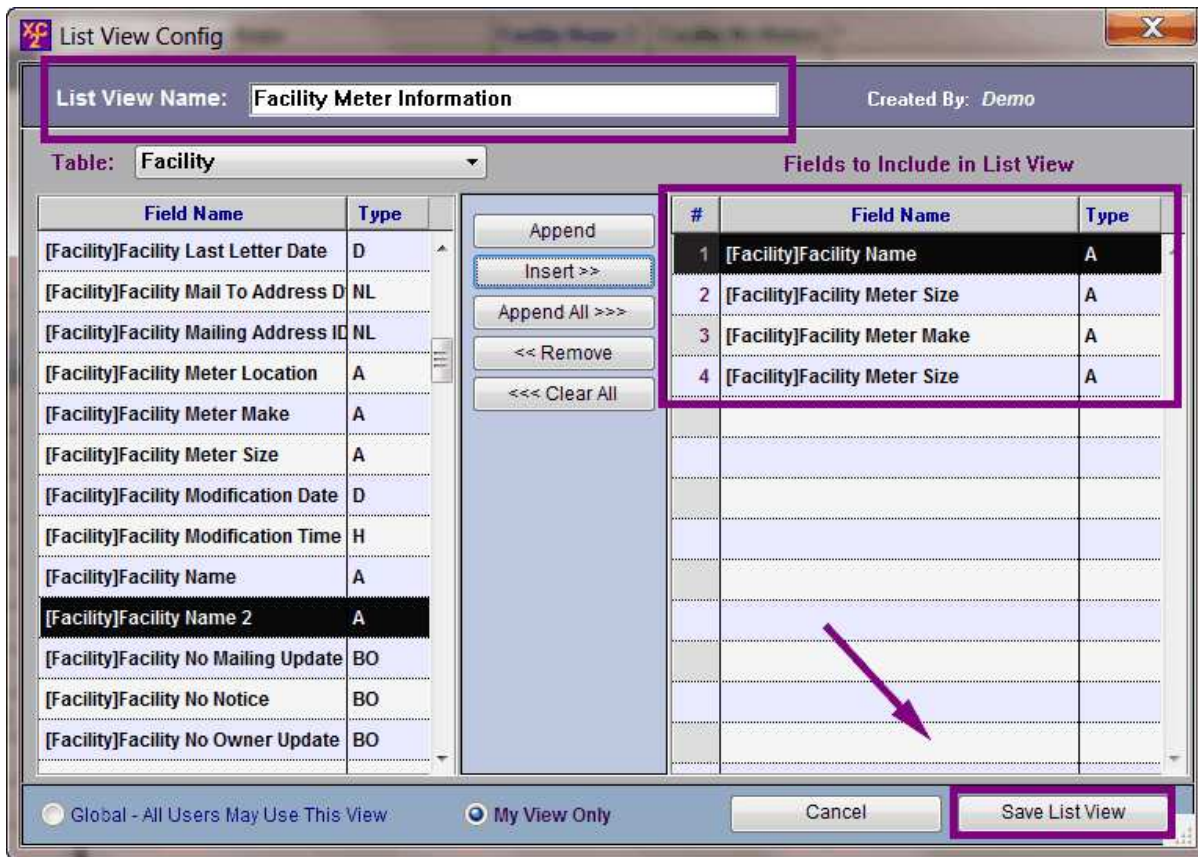
Create New List

First, create a name for the list.

Second, select the fields to be included in this list. When you find a field on the left side of the screen that you want to be on the list, highlight it and either click "Insert" or drag and drop it into the list on the right side of the screen.

Here I have created a list that just includes Facility Meter Information.

Click Save List View when done.



Notes:

Access New List

After you save your list, a new link will appear in the List View pulldown menu.

You can access your list by clicking on that link.

The screenshot shows the XC2 Software interface for BFP: City of Snoqualamish, WA. The window title is "XC2 Software - BFP : City of Snoqualamish, WA: * Facility: 75 of 75 Records : Multi-Line". The interface includes a toolbar with options like Add, Delete, Find, Sort, Show All, Export, Saved Search, and Report. Below the toolbar, there are dropdown menus for "List Views" (set to "Facility") and "Find:" (set to "Facility Name").

The main area displays a table with the following columns: #, Facility Name, Facility Meter Size, Facility Meter Make, and SIC Code. The table contains 75 records, with the following data visible:

#	Facility Name	Facility Meter Size	Facility Meter Make	SIC Code
57	SLOAN PAUL & CHARLENE SL	3	NEPTUNE	*
58	SO FINE LIMOUSINE SERVICE	F4	NEPTUNE	*
59	SOUTHWEST RADIOGRAPHIC	2	NEPTUNE	*
60	SPECIALTY SYSTEMS	1	NEPTUNE	*
61	SPLASH OF COLOR	5/8	ROCKWELL	*
62	STEELS ELEMENTARY SCHOOL	1:1/2	BADGER	*
63	STEWART PAINTING & RESTO	1	NEPTUNE	*
64	STOREWISE SOFTWARE INC	1	NEPTUNE	*
65	T-M SERVICE CO	1	NEPTUNE	*
66	TAFUYA ELECTRIC	6	ROCKWELL	*
67	TAYLORS LIQUORS	2	NEPTUNE	*
68	TOYS-R-US	F4	NAME	*
69	U S HOSPITALITY CONSULTAN			*
70	WEBER MANAGEMENT COMP	1:1/2	NEPTUNE	*
71	WEJ MANAGEMENT CORP	1:1/2	NEPTUNE	*
72	WILLIE'S PLACE	2	NEPTUNE	*
73	WORLD COMPUTER CORPOR	1	NEPTUNE	*
74	WORLD WIDE FUNDING	2	ROCKWELL	*
75	XELCO COLLECTION SERVICE	1	ROCKWELL	*

On the left side, there is a "List Views" pulldown menu. The "FACILITY METER INFORMATION" option is highlighted with a purple box. A purple arrow points from this menu item to the row for "STEELS ELEMENTARY SCHOOL" in the table.

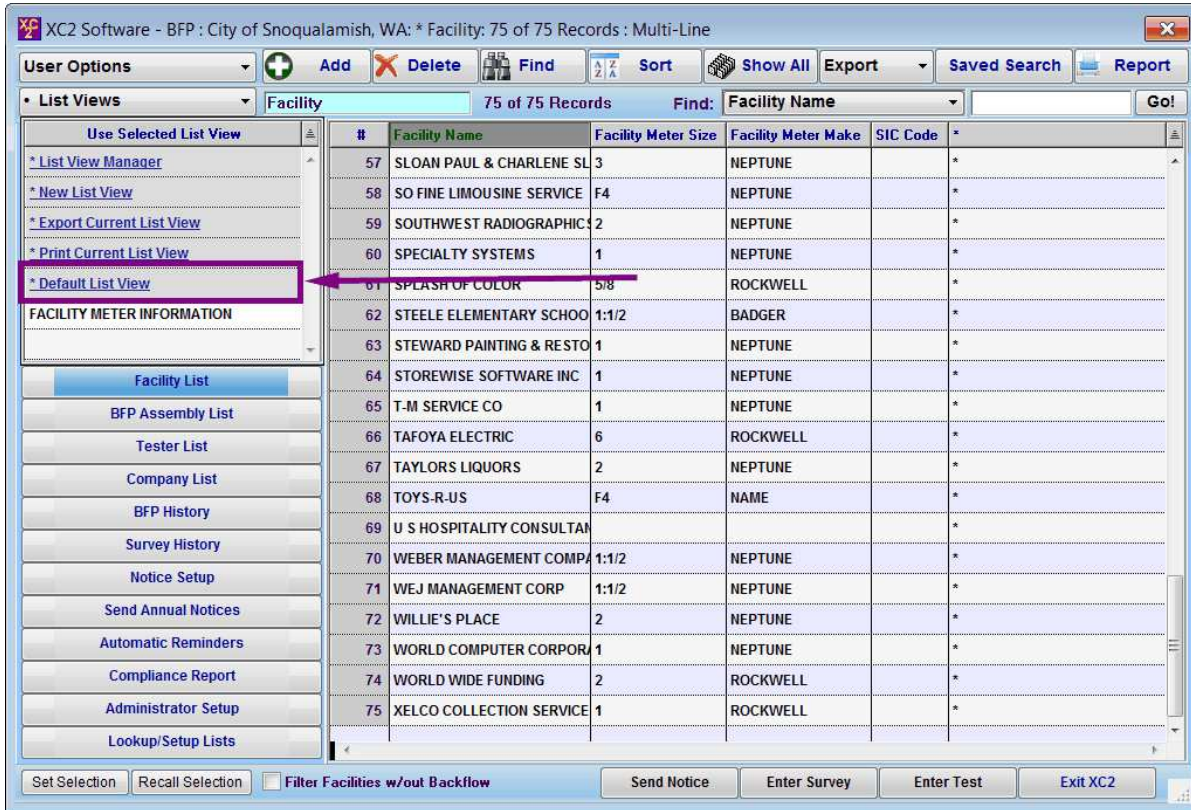
At the bottom of the interface, there are buttons for "Set Selection", "Recall Selection", "Filter Facilities w/out Backflow", "Send Notice", "Enter Survey", "Enter Test", and "Exit XC2".

Notes:

Changing Your List View

You can switch back to your old List View easily - here I am accessing my default list by clicking on Default List View.

You can easily switch between all lists by clicking on the lists link.

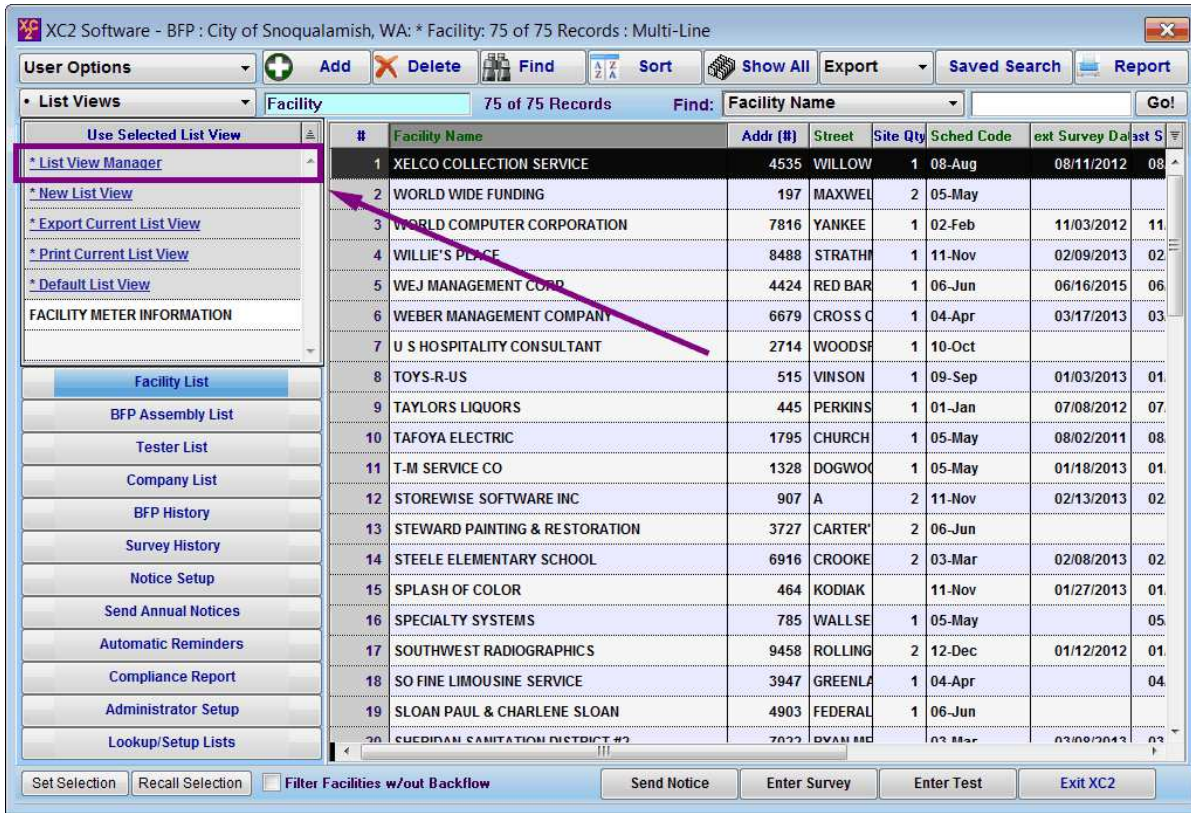


Notes:

Editing Your List View

If you want to edit previously made List Views

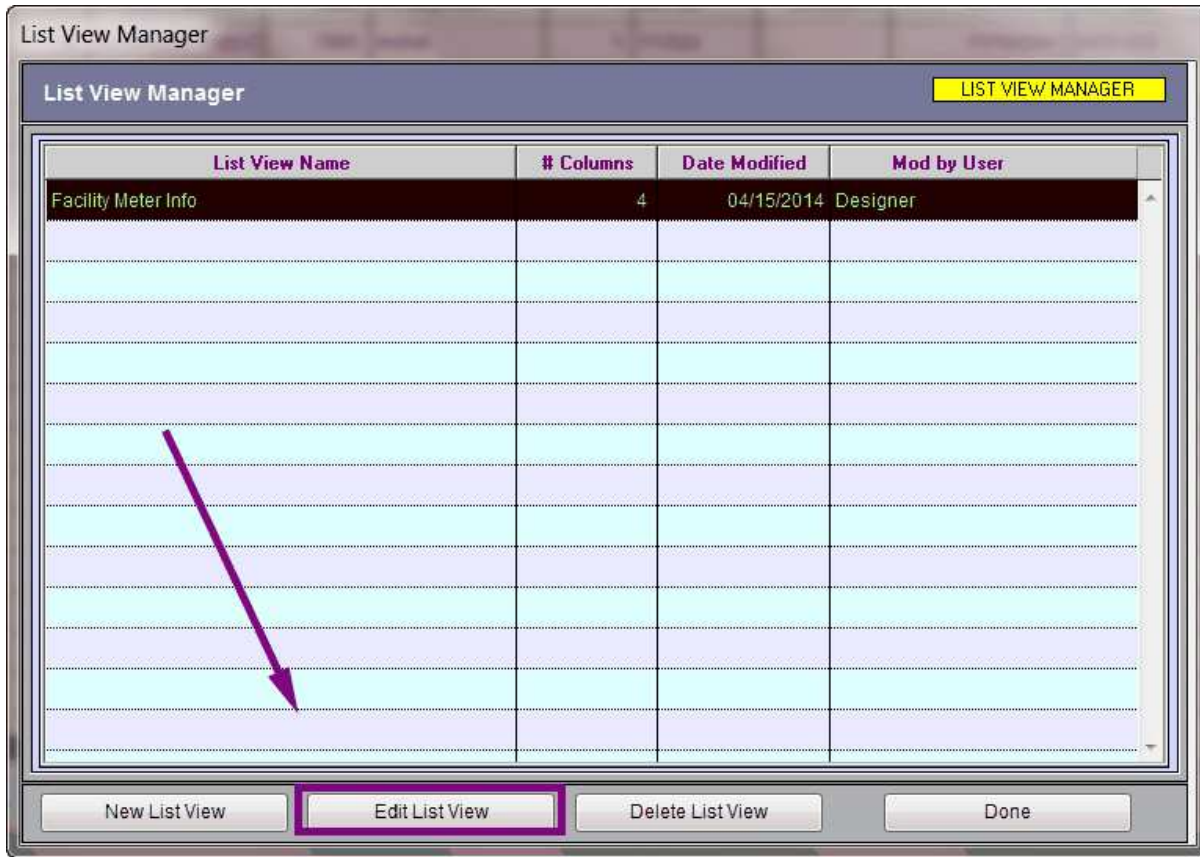
Select List View Manager in the List View pulldown menu.



Notes:

Edit List View

With the List View Manager selected, choose the list you would like to edit and select Edit List View.



Notes:



XC2 User Manual

Favorite Tasks

- **Using Favorite Tasks**
- **Customizing Favorites Tasks List**
- **Lookup/Resource List**



XC2 Software Knowledge Base



Using Favorite Tasks

KB Asset ID: 3514

This page describes what Favorite Tasks is and how to navigate Favorite Tasks

[Favorite Tasks](#)

Favorite Tasks is located in the bottom left portion of the main screen

XC2 Software - BFP : * Facility History: 101 of 0 Records : Multi-Line : WEB SERVER ON : 80 : WEB BFP Test

User Options Add Delete Find Sort Show All Export Saved Search Report

Main Page Functions Facility History 101 of 0 Records Find: Facility Name

#	Activity Date	Facility Name	Violations Qty	Qty Corrected
9	00/01/09	LITTLETON GARAGE DOOR SERVICE		
10	09/30/11	ACADEMY T V SERVICE - !!!!!!!!!!!!!!! CHANGE		
11	11/29/11	GRAPHIC DESIGNEES		
12	11/29/11	GRAPHIC DESIGNEES		
13	08/31/10	A & B FOREST FRESH CO		
14	09/21/10	A & B FOREST FRESH CO		
15	08/31/10	A & B FOREST FRESH CO		
16	08/31/10	A & B FOREST FRESH CO		
17	12/21/10	REAL PROPERTY VALUATIONS INC		
18	06/10/10	LANYON SPRINKLER CO		
19	03/15/10	1LAKEWOOD FAMILY MEDICAL CLINIC PC		
20	04/05/10	NATIONAL LENDER SERVICES INC --- CHANGE		
21	04/10/10	GRAPHIC DESIGNEES		
			213.00	200.00

Selection ... Filter On

Send Notice Enter Survey Enter Test Exit XC2

Notes:

What Is Favorite Tasks

Favorite Tasks will be your main navigation hub.

This is how you will access your "Data Tables"

Data Tables include

- Facility Records
- Assembly Records
- Testing Company Records
- Tester Records
- Test History
- Test Kit List

By clicking on one of the buttons inside the Main Page you will display associated records

We will have specific Chapters dedicated to each table later in this guide.

For now just know that this is how you will navigate between data tables.



XC2 Software Knowledge Base



Customize Favorite Tasks

KB Asset ID: 2866

This page describes how to customize favorite tasks on the Main Page.

What Are "Favorite Tasks"?

Favorite Tasks is a **fully-customizable** section on the Main Page that gives each user quick access to specific lists and specific tasks.

The picture below shows where this section is located on the Main Page.

Note: This feature is only available in the latest version, XC2-XO.

If you are currently running XC2-2K11 and would like to use this feature, you will need to upgrade to XC2-XO.

This upgrade will need to be scheduled, so please call XC2 at your convenience to schedule it.

If your Maintenance & Support contract is current, you can upgrade to XC2-XO at no charge.

The screenshot shows the XC2 software interface. At the top, there's a title bar: "XC2 Software - BFP : City of Snoqualamish, WA: * Facility: 74 of 74 Records : Multi-Line". Below that is a toolbar with buttons: "User Options", "Add", "Delete", "Find", "Sort", "Show All", "Export", "Saved Search", and "Report".

The main area displays a table of facilities. The table has columns: "#", "Facility Name", "Addr (#)", "Street", "Site Qty", "Sched Code", "Next Survey Date", and "Last Survey". A purple arrow points to the "Favorite Tasks" sidebar on the left, which is highlighted with a purple box. The sidebar contains a list of tasks: "Facility List", "BFP Assembly List", "BFP Testers List", "Tester Company List", "Test Kits List", "Test History", and "Facility Survey History List". At the bottom of the sidebar is a "Configure Favorite Tasks" button.

#	Facility Name	Addr (#)	Street	Site Qty	Sched Code	Next Survey Date	Last Survey
1	29th Ave Liquor	4880	Beech Ridge	2	02-Feb	10/12/11	10/
2	A & B Forest Fresh CO	4415	Ferguson	1	08-Aug	08/03/11	08/
3	A Flan House	1583	Kim		09-Sep	04/14/15	04/
4	A Quest Electronics	5289	Preston Mill	1	04-Apr	08/22/11	08/
	Academy T V Service	7704	Quarter	1	11-Nov	11/29/16	11/
6	Academy Veterinary Hospital	8350	Lighthouse	3	08-Aug	08/14/11	08/
7	Advantage Brokers	5120	Webb	1	12-Dec	04/14/15	04/
8	Bethesda At St Anthony Hospital N	1802	Woodcreek	3	07-Jul	02/21/13	02/
9	Boulder Mtn Overcharge Claim Aud	7930	Mays	1	04-Apr	04/13/08	04/
10	Captain's Chair	6725	Sheridan	2	02-Feb	02/28/11	02/
11	Children's Hospital	1552	Naples Nation	3	03-Mar	11/06/12	11/
12	Echosphere Corporation	7210	West View	1	09-Sep	09/22/11	09/
13	Graphic Designees	9044	Kelsey	1	12-Dec	11/29/16	11/
14	Hospitality Group Inc The	429	Cali Glen	1	10-Oct	03/28/13	03/

At the bottom of the interface, there are buttons: "Selection ...", "Filter On", "Filter Facilities w/out Backflow", "Send Notice", "Enter Survey", "Enter Test", and "Exit XC2".

Notes:

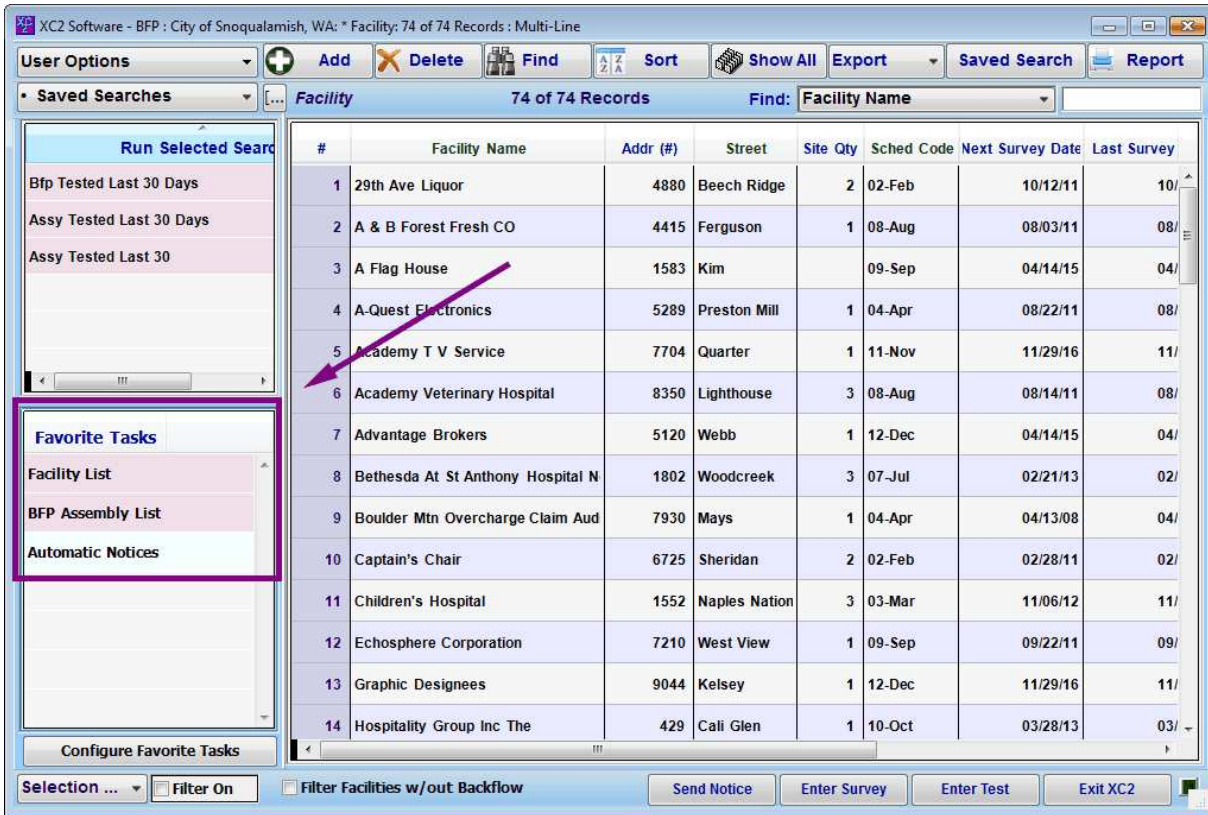
How to make Favorite Tasks look the way you want

We designed favorite tasks with individual users in mind. **Each User** can choose the tasks available in Favorite Tasks.

Notice below I have changed Favorite Tasks to only include:

- Facility List
- Assembly List
- Automatic Notices

I have also changed the color of each button



Notes:

How to Customize Favorite Tasks

To customize Favorite Tasks, click Customize Favorite Tasks

Note: If you have not accessed "Customize Favorite Tasks" before, a heart will be located on this button

The screenshot shows the XC2 Software interface for the City of Snoqualamish, WA. The main window displays a list of 74 facilities. The sidebar on the left contains a 'Favorite Tasks' section with a list of tasks. The 'Customize Favorite Tasks' button at the bottom of this list is highlighted with a red box, and a red arrow points to it from the facility list.

#	Facility Name	Addr (#)	Street	Site Qty	Sched Code	Next Sur
1	29th Ave Liquor	4880	Beech Ridge	2	02-Feb	
2	A & B Forest Fresh CO	4415	Ferguson	1	08-Aug	
3	A Flag House	1583	Kim		09-Sep	
4	A-Quest Electronics	5289	Preston Mill	1	04-Apr	
5	Academy T V Service	7704	Quarter	1	11-Nov	
6	Academy Veterinary Hospital	8350	Lighthouse	3	08-Aug	
7	Advantage Brokers	5120	Webb	1	12-Dec	
8	Bethesda At St Anthony Hospital North	1802	Woodcreek	3	07-Jul	
9	Boulder Mtn Overcharge Claim Audit	7930	Mays	1	04-Apr	
10	Captain's Chair	6725	Sheridan	2	02-Feb	
11	Children's Hospital	1552	Naples National	3	03-Mar	
12	Echosphere Corporation	7210	West View	1	09-Sep	
13	Graphic Designees	9044	Kelsey	1	12-Dec	
14	Hospitality Group Inc The	429	Cali Glen	1	10-Oct	

Notes:

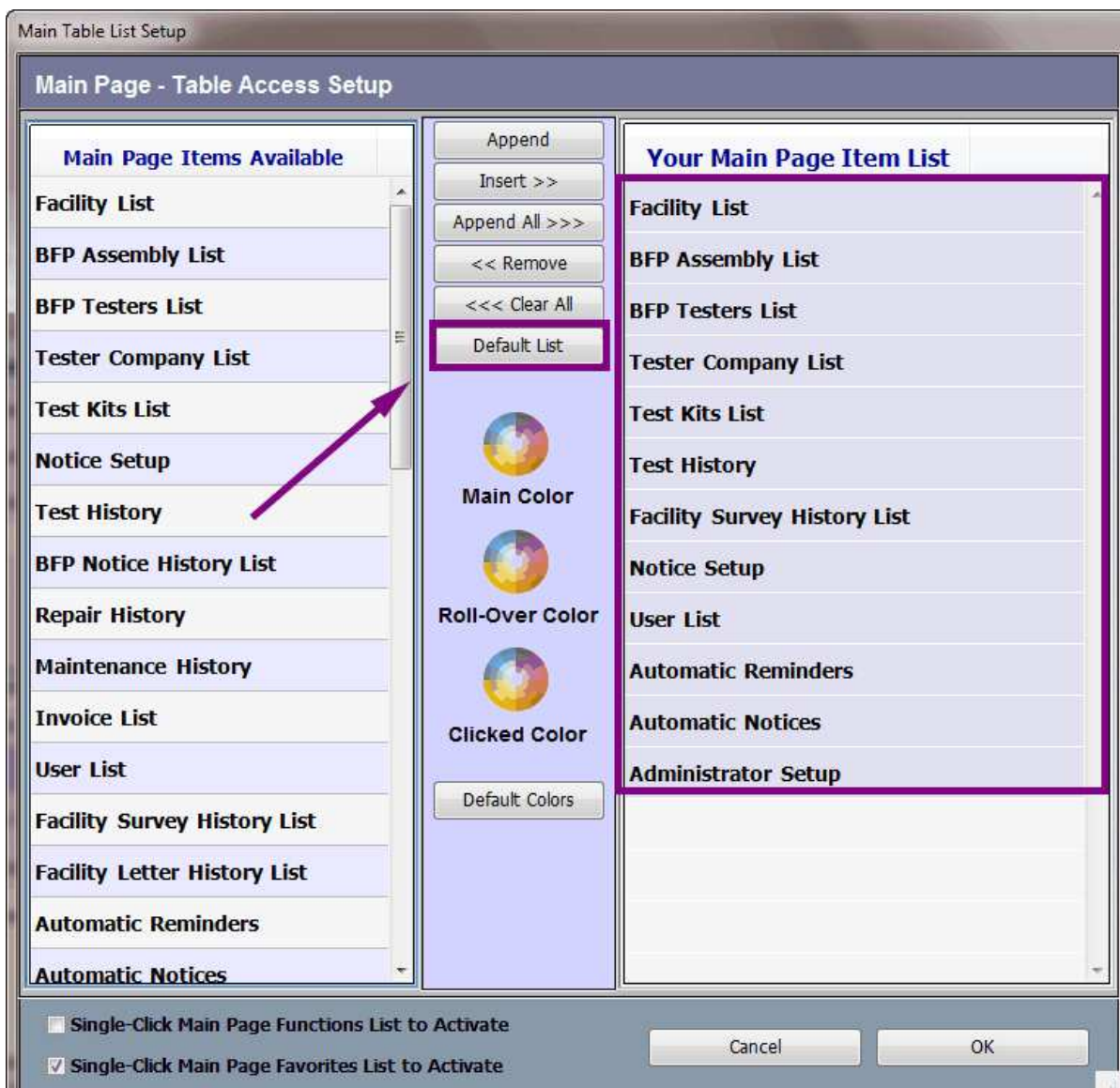
Default List

By default, the following items are made available in Favorite Tasks (these are the default Items for Super Administrator access)

- **Facility List:** Access to Facility Records
- **BFP Assembly List:** Access to Assembly Records
- **BFP Testers List:** Access to Tester Records
- **Tester Company List:** Access to Tester Company Records
- **Test Kits List:** Access to Test Kit Records
- **Test History:** List of all Test Records
- **Facility Survey History List:** List of all Survey Records
- **Notice Setup:** Create New or Edit Current Notices
- **User List:** Current XC2 User Login Accounts
- **Automatic Reminders:** Items that may require attention
- **Automatic Notices:** Send Notices via Automatic Notices
- **Administrator Setup:** Make Administrator changes to XC2

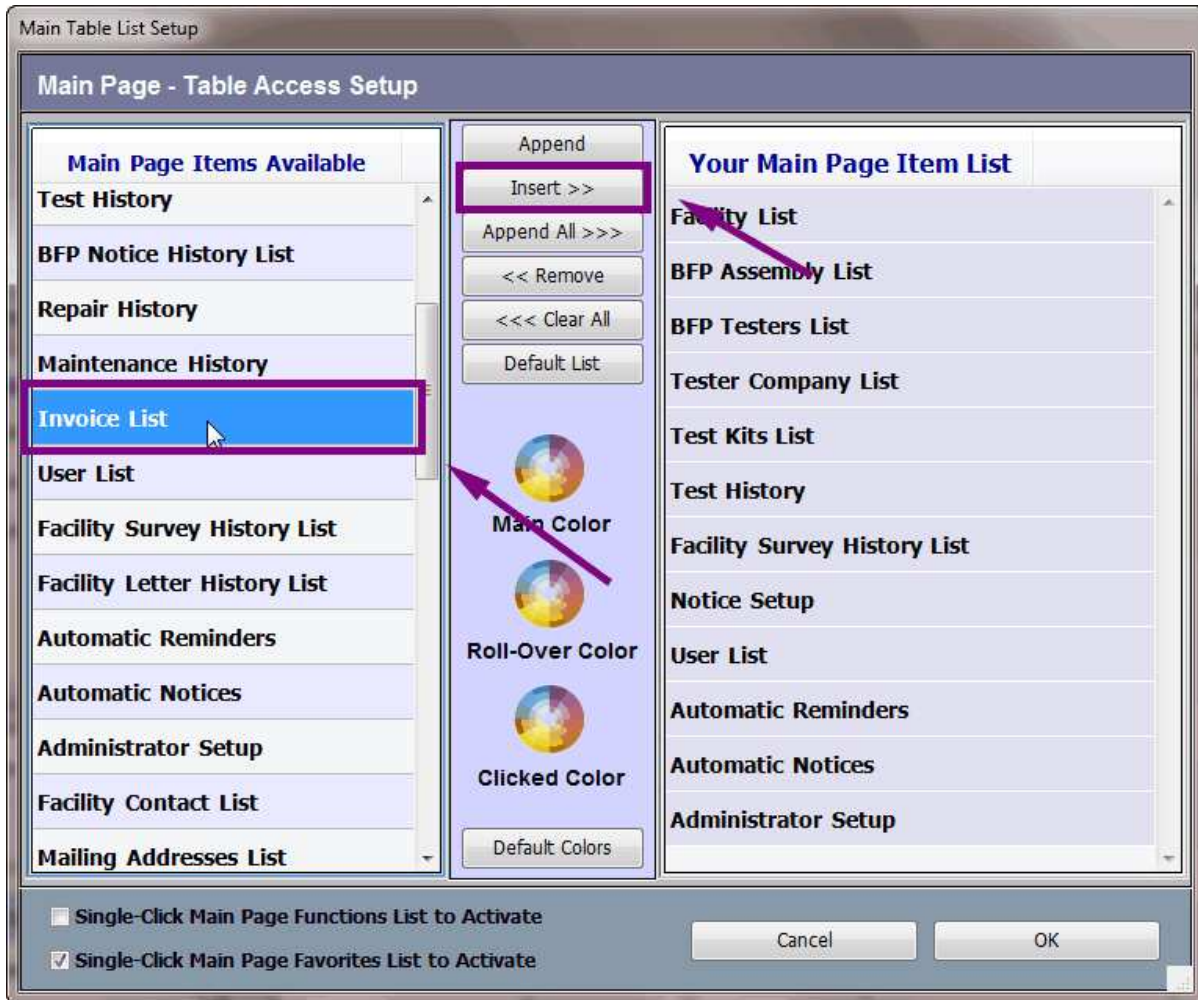
You may rearrange this list in any order you like by highlighting the list name and dragging and dropping it into the location you want. You can also remove or add items.

At any given time, you can click the Default List button to restore the default task options.



Adding Items

You can add items to the Favorite Task list by double-clicking on the item on the left (or by highlighting the item), and then clicking Insert.

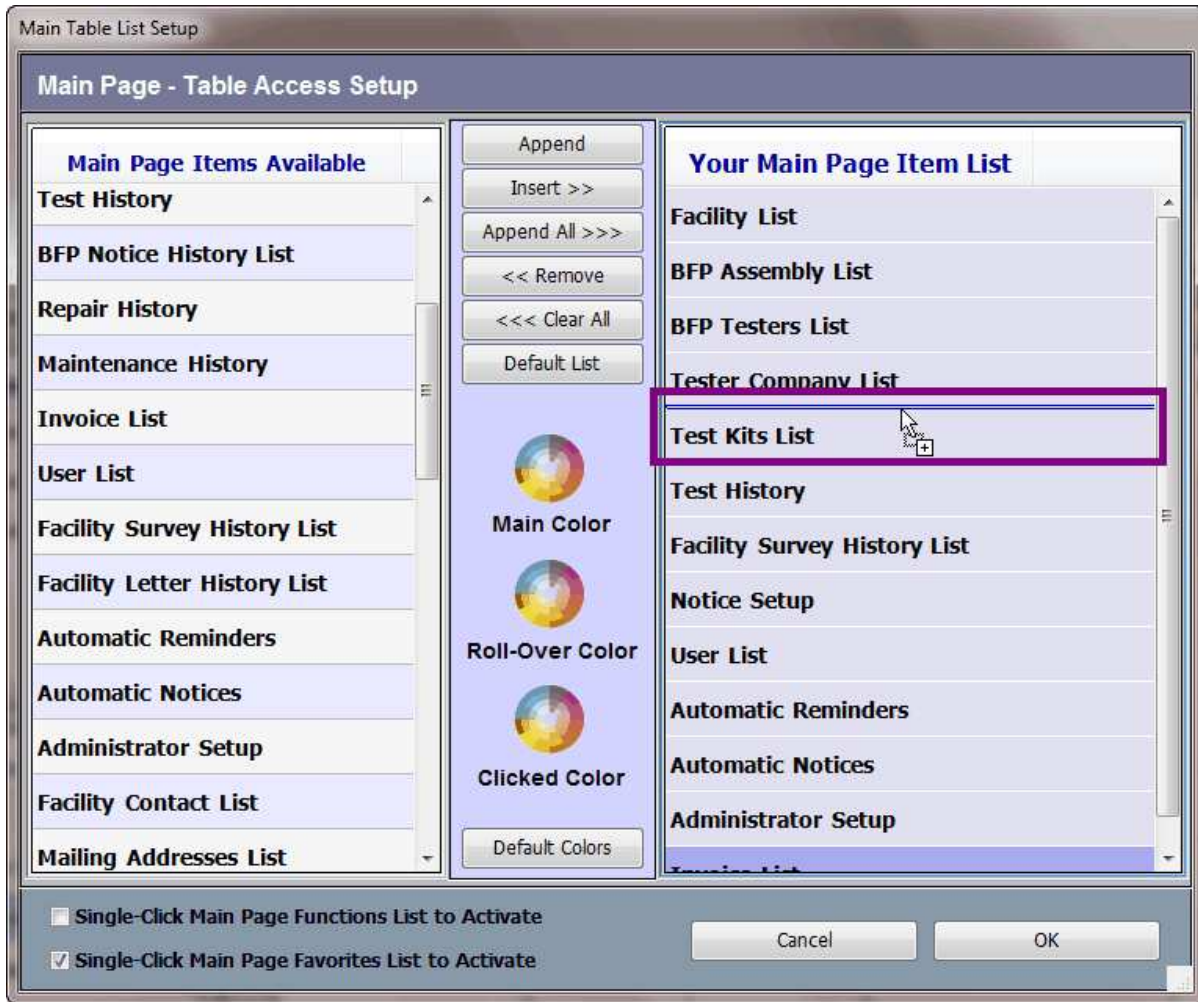


Notes:

Rearranging Items

You may re-arrange the items in the list by clicking and dragging the item up or down the list.

Note: when you drag an item, a plus sign will appear and the location where the item will be moved to will be outlined in blue.

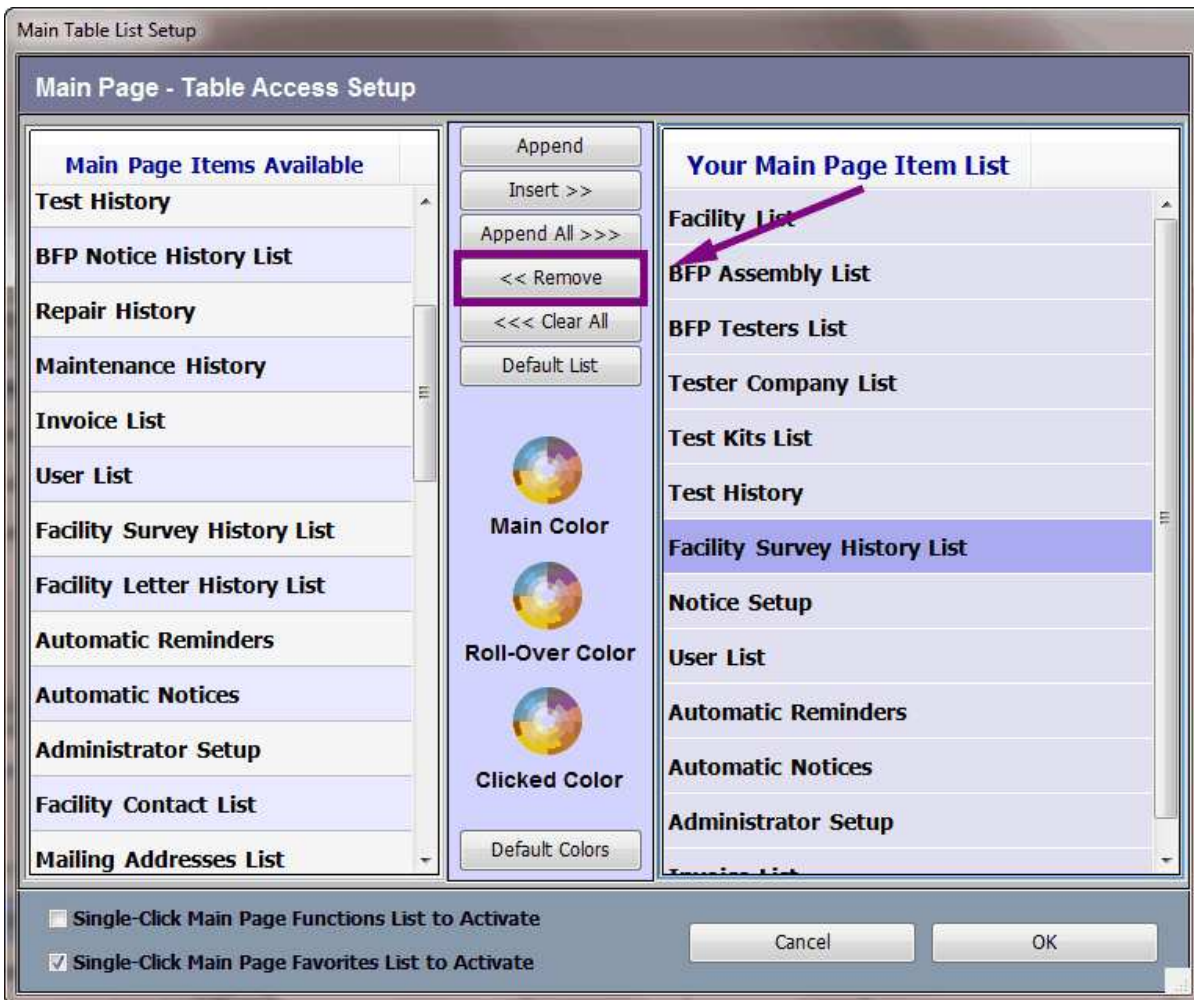


Notes:

Removing Items

You can remove an item by highlighting the item and then clicking Remove.

Note: you may remove all items from this list by clicking Clear All.



Notes:

Changing the Color of Buttons

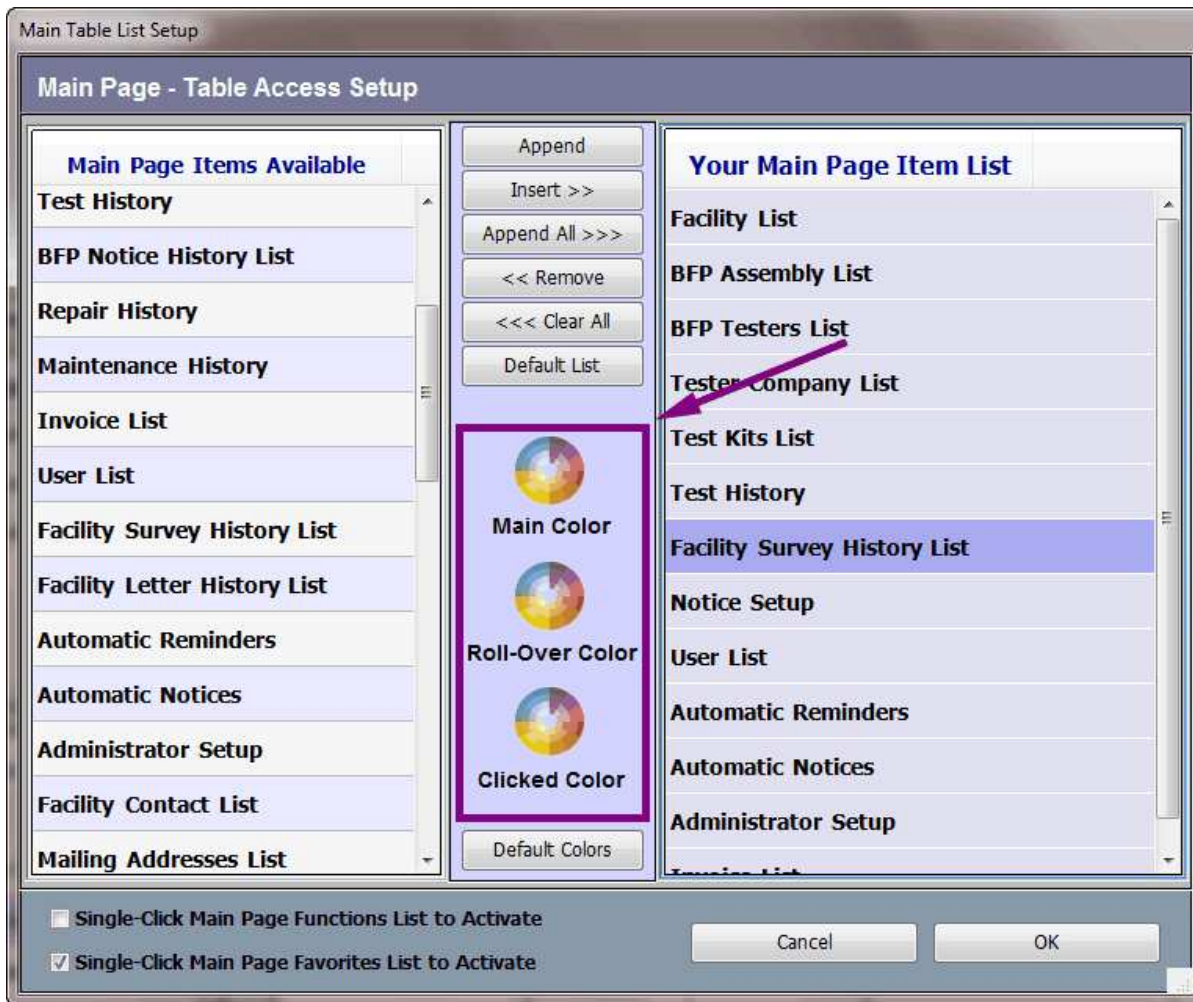
The buttons can be one of three colors at any time.

Main Color: This is the default color of the buttons if it is not selected or your cursor is not "hovering" over the button.

Roll-Over Color: This is the color of the button if your cursor is "hovering over" the button.

Clicked Color: This is the color of the button when the button has been clicked.

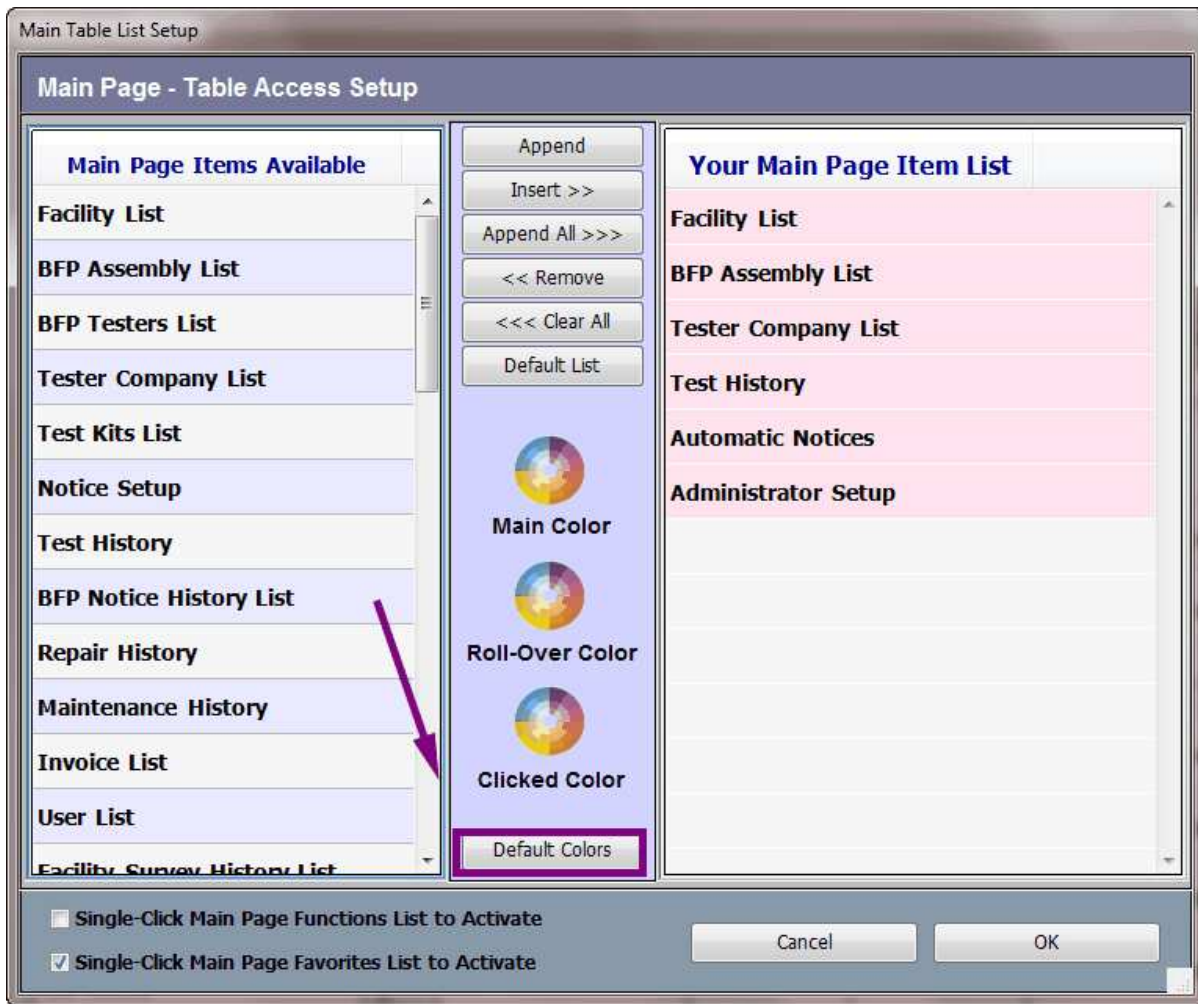
To change the color, click the color wheel located above the type of color you would like to change.



Notes:

How to Return Colors to Default (if desired)

If you decide you like the default colors better, click Default Colors.



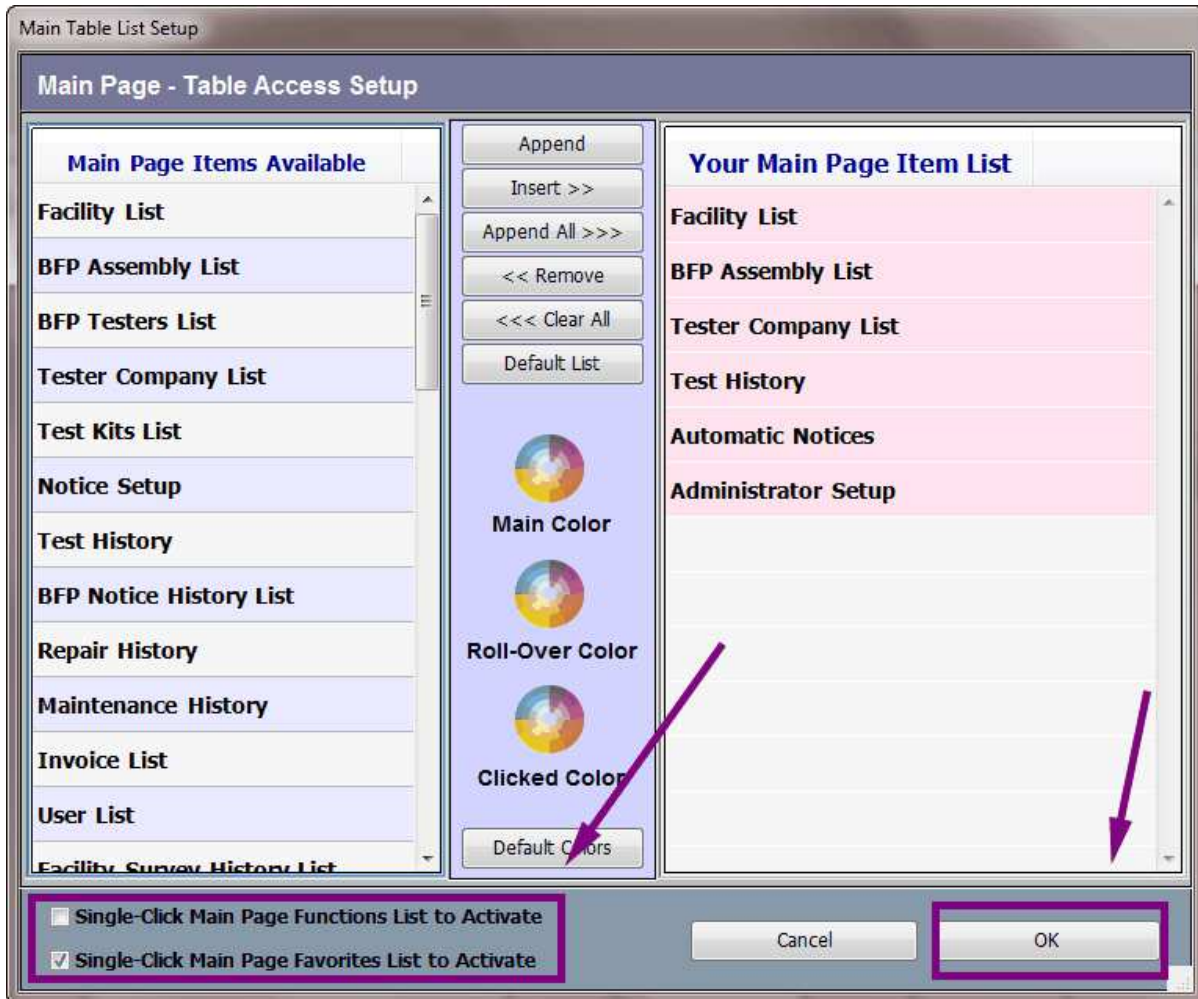
Notes:

Single Click, Double Click

You can even change the behavior of each button.

Select Single Click if you prefer single-clicking over double-clicking.

When you are finished customizing Favorite Tasks, click OK.



Notes:



XC2 Software Knowledge Base



Lookup/Resource List Overview

KB Asset ID: 3527

This Page Describes What the Lookup/Resource list is, and how to modify items in this area.

What is Lookup/Resources List?

The Lookup/Resources list area is an important configuration area that allows users to customize specific items in XC2.

Items that can be customized in the lookup/resource area includes

- 1) Zip Codes
- 2) Equipment Types
- 3) H2O Organizations
- 4) Most Pulldown Menus
- 5) Hazard Types

View Setup Lists

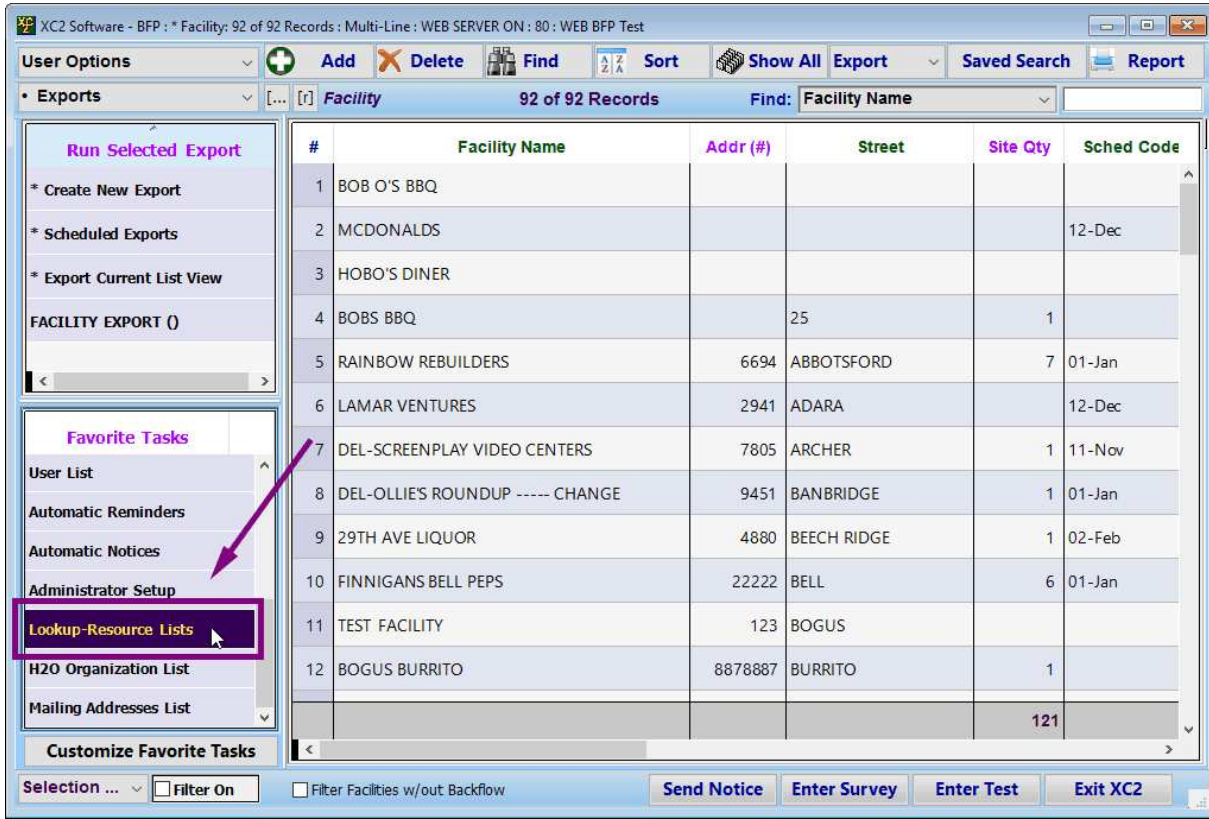
Select a Setup List To View

Setup Lists	ID
Activity Type	010
BFP Hazard Type	025
Boiler Plate Text	066
Business Category Code	029
Choice List Manager	003
Compliance Rpt Category	170
Equipment Model	002
Equipment Model Size	028
Equipment Size	014
Equipment Type	015
Fixture Type	090
H2O Organization	021
...	...

Cancel
Select

Where do I find the Lookup/Resource List?

This area can be found under favorite tasks.



Notes:

Example - Zip Codes

Most of the Items in the Lookup/Resource list area are customized the same way.

here I will demonstrate an example of how to create a new zip code

Create a new Zip Code record

Highligh Zip Code and click select

View Setup Lists

Select a Setup List To View

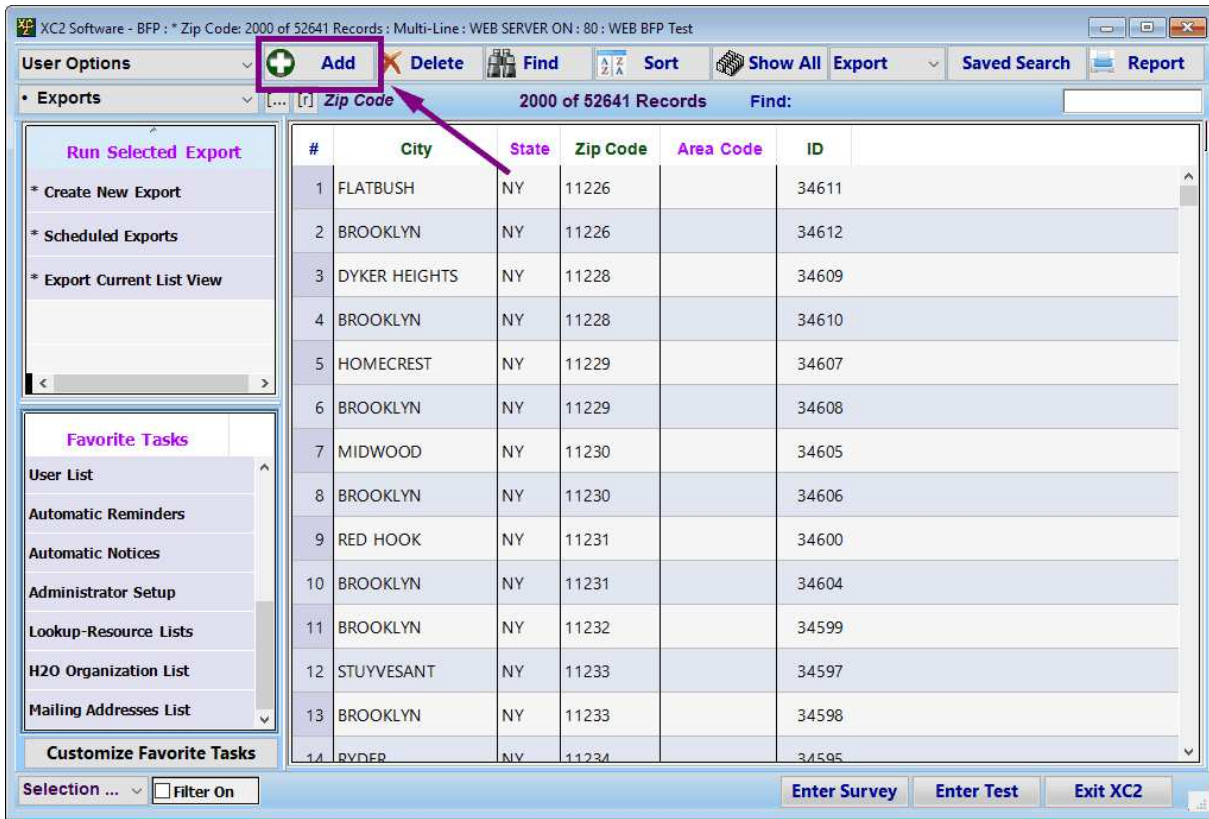
Setup Lists	ID
Activity Type	010
BFP Hazard Type	025
Boiler Plate Text	066
Business Category Code	029
Choice List Manager	003
Compliance Rpt Category	170
Equipment Model	002
Equipment Model Size	028
Equipment Size	014
Equipment Type	015
Fixture Type	090
H2O Organization	021
Line Item Codes	074
Manufacturers	022
Schedule Code	033
Street List	058
Test Kit Models	040
User	012
Zip Code	011

Cancel Select

Notes:

Add New Zip Code Record

Click Add to create a new Zip Code Record



Notes:

Save You New Entry

Enter

Zip Code

City

State

Area Code (optional)

XC2 Software - BFP : New Record For: : Zip Code : WEB SERVER ON : 80 : WEB BFP Test

Zip Code Entry ZIP.2

Zip Code 55599

City ANYTOWN

State/Province CA Area Code 555

County (Opt.) XC2-County

New Search < < > > Cancel Save

Notes:

Zipcode will be Added

The screenshot shows the XC2 Software interface with a table of records. The table has columns for #, City, State, Zip Code, Area Code, and ID. Row 38 is highlighted in blue and enclosed in a purple box. A purple arrow points to this row. The interface includes a top menu bar with options like Add, Delete, Find, Sort, Show All, Export, Saved Search, and Report. On the left, there are sections for 'Run Selected Export' and 'Favorite Tasks'. At the bottom, there are buttons for 'Enter Survey', 'Enter Test', and 'Exit XC2'.

#	City	State	Zip Code	Area Code	ID
29	AMIRET	MN	56112		25988
30	ANAHUAC	TX	77514		47087
31	ANDOVER	MN	55304		25759
32	ANGLETON	TX	77516		47084
33	ANGLETON	TX	77515		47085
34	ANGORA	MN	55703		25441
35	ANNANDALE	MN	55302		25764
36	ANOKA	MN	55304		25761
37	ANOKA	MN	55303		25763
38	ANYTOWN	CA	55599	555	104577
39	APPLE VALLEY	MN	55124		25807
40	ARAGO	OR	97458		40787
41	ARCADIA	OH	44804		37752
42	ARCADIA	TX	77517		47082

Notes:



XC2 User Manual

User Options

- **Changing Colors Themes and Fonts**
- **Quick Search Setup**
- **How to Change Other Users Password**
- **How to Change Your Own Password**
- **Users Avatar Feature**



XC2 Software Knowledge Base



User Preferences: Colors, Themes and Font Size

KB Asset ID: 39

Each User Account in XC2 can be customized to reflect their own personal preferences. This page describes how to change your color and font settings in XC2.

Personalize

XC2 allows each user to personalize all screens. As you see below, you can get very creative.

XC2 Software - BFP : City of Snoqualamish, WA: * Facility: 76 of 76 Records : Multi-Line

User Options [Add] [Delete] [Find] [Sort] [Show All] [Export] [Saved Search] [Report]

• Saved Searches [Facility] 76 of 76 Records Find: Facility Name

#	Facility Name	Addr (#)	Street	Site Qty	Sched Code	Next Survey Date	Last Su
1	Littleton Garage Door Service	6669	Scottwood	1	01-Jan	06/01/14	
2	Seniors in Community Living Inc	9095	Greyson	2	05-May	02/16/11	
3	Rainbow Rebuilders	6694	Abbotsford	2	01-Jan	12/22/11	
4	Storewise Software Inc	5038	Somerset	2	11-Nov	02/13/13	
5	Lakewood Family Medical Clinic Pc	7846	Champions	1	01-Jan	12/21/15	
6	Polymedica Industries Inc	2672	Hornsea	1	05-May	04/04/11	
7	Sheridan Sanitation District #2	7022	Ryan Meadow	1	03-Mar	03/08/13	
8	Peck Doran P C	1556	Inverness	1	06-Jun	02/17/11	
9	T-M Service CO	1328	Dogwood	1	05-May	01/18/13	
10	Mex Imports	6471	Chant	1	12-Dec	01/06/13	
11	Tafoya Electric	1795	Church View	1	05-May	08/02/11	
12	Taylor's Liquors	445	Perkins	1	01-Jan	07/08/12	
13	North Star Liquor	7698	Hunters	1	04-Apr		
14	LA Salle Partners	5622	Sterling Glen	1	02-Feb	03/06/13	
15	Screenplay Video Centers	7805	Archer	1	11-Nov		
16	Willie's Place	8488	Strathmoore	1	11-Nov	02/09/13	
17	Malecall II	9044	Kelsey	1	12-Dec	11/29/16	

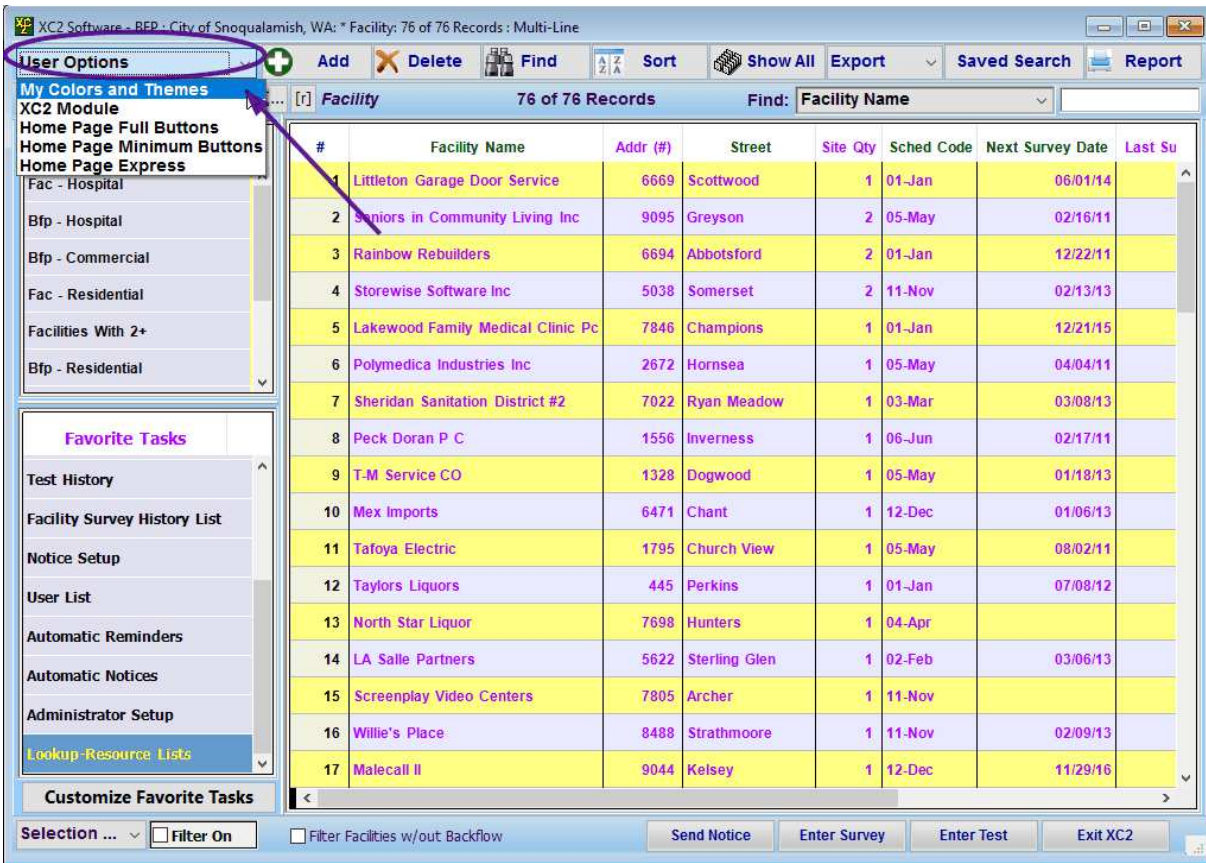
Selection ... [Filter On] [Filter Facilities w/out Backflow] [Send Notice] [Enter Survey] [Enter Test] [Exit XC2]

Notes:

Finding Colors and Themes

To Access Colors and Themes go to Users Options

Select My Color and Themes



Notes:

Colors and Themes Tab

In My User Preferences

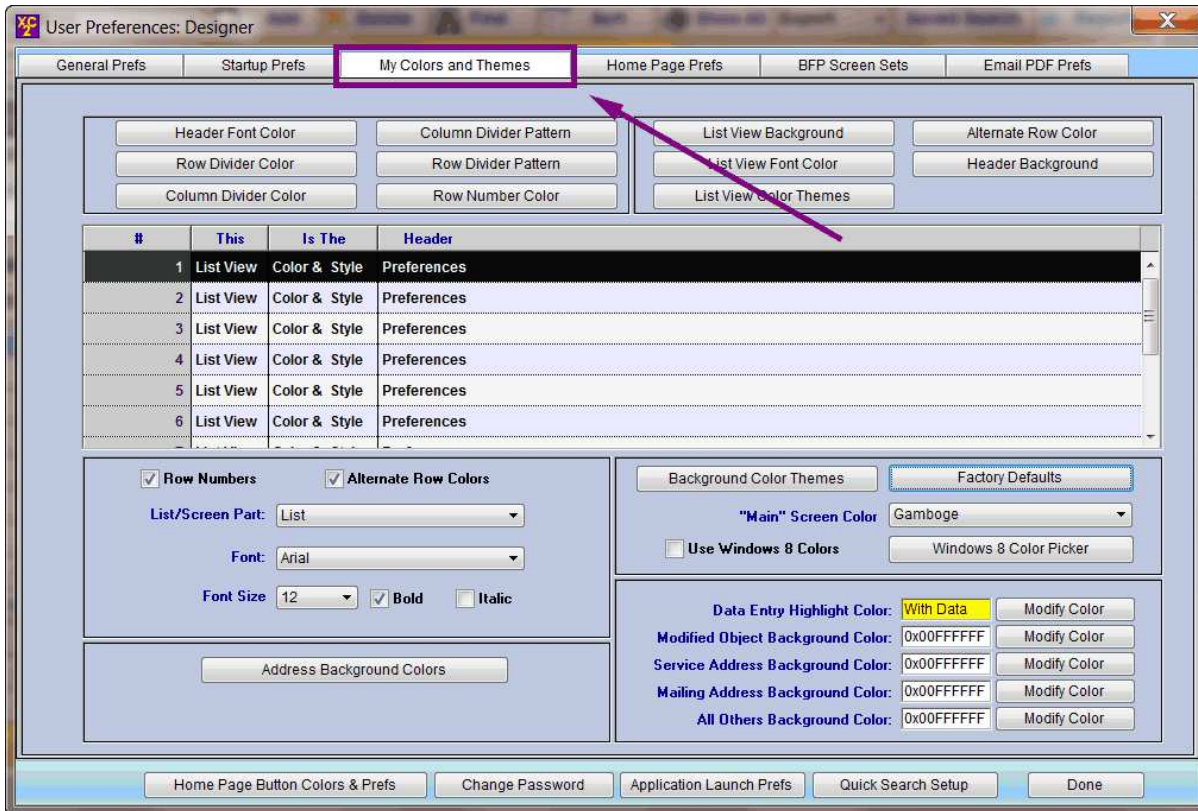
Click on the My Colors and Themes Tab

In My Colors and Themes, you can

Change Font Size and Style

Change List View Settings

Change The color of Background Windows

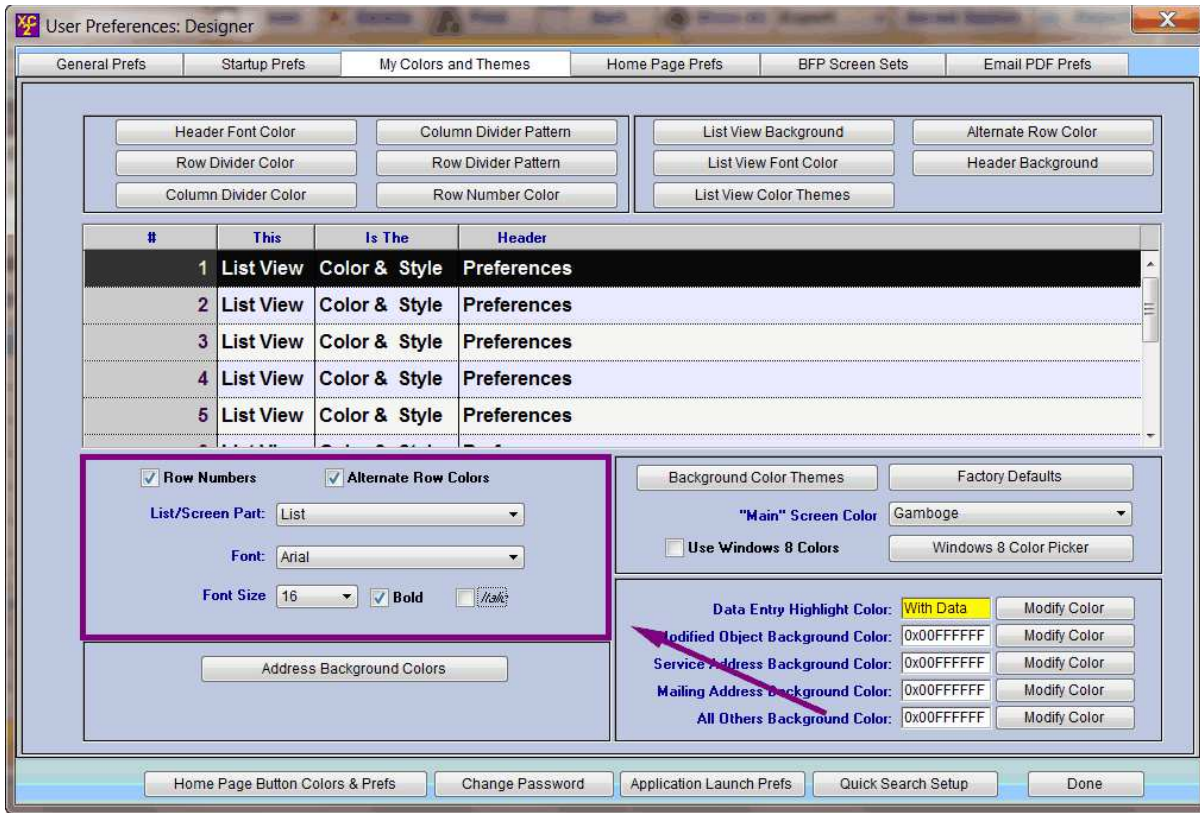


Notes:

Change Your Font Style or Size

Customize your Fonts in XC2 by choosing your Font Type, Font Size, Font Style and Font Color

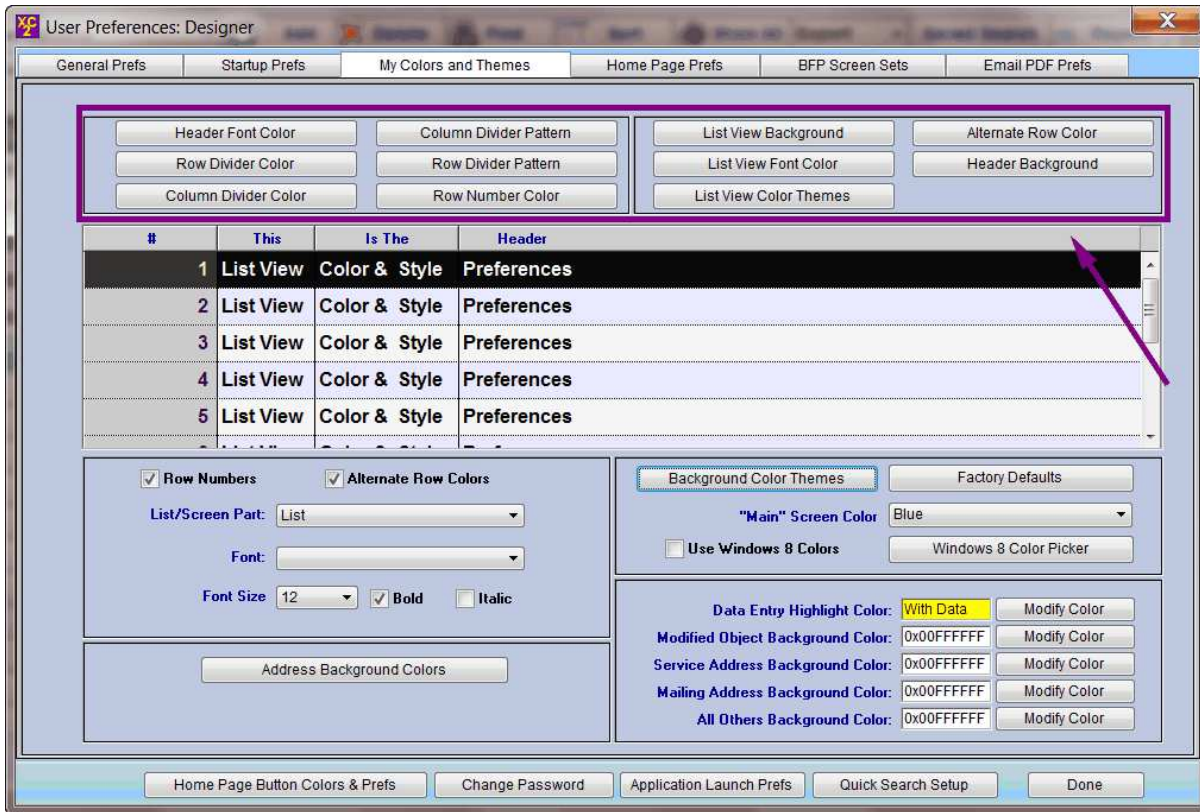
Here I made my Font Size Larger in the List View.



Notes:

Change Your List View Color Settings

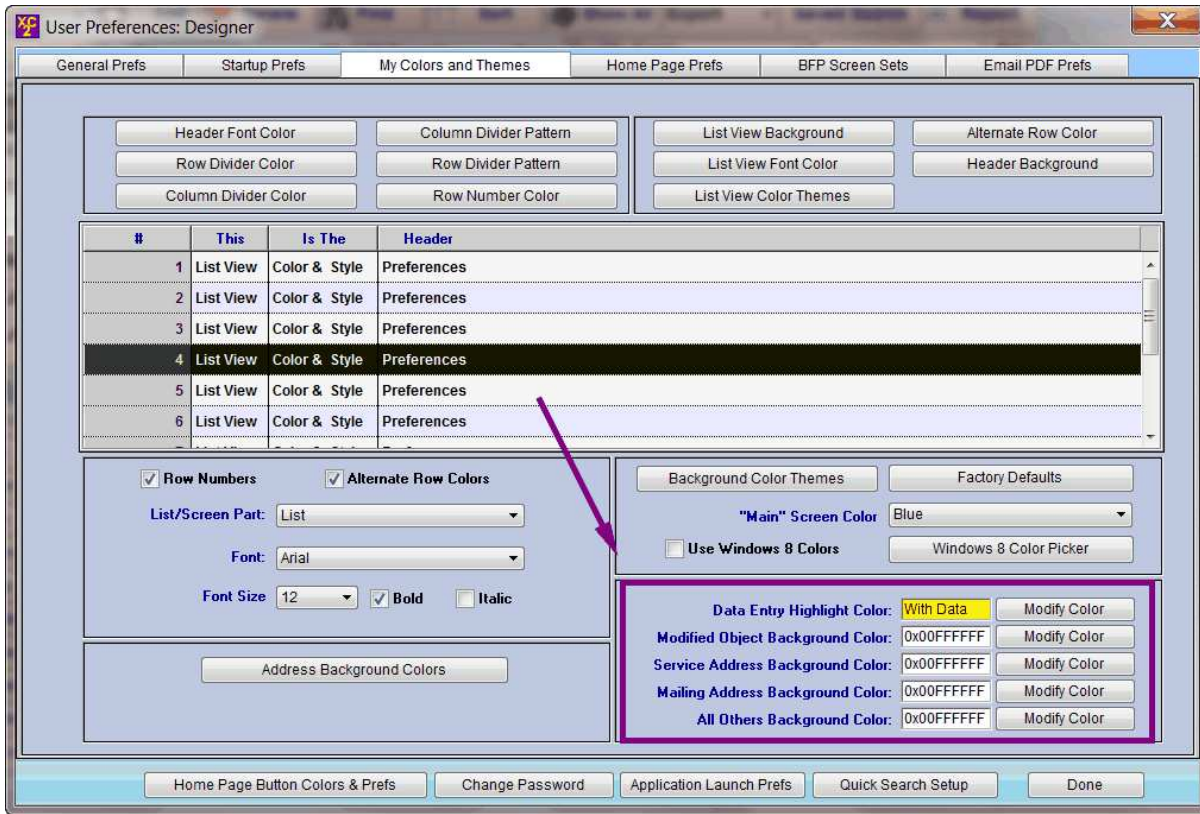
Change your List View Color settings by clicking on the buttons on the top portion of the screen



Notes:

Change Background Color

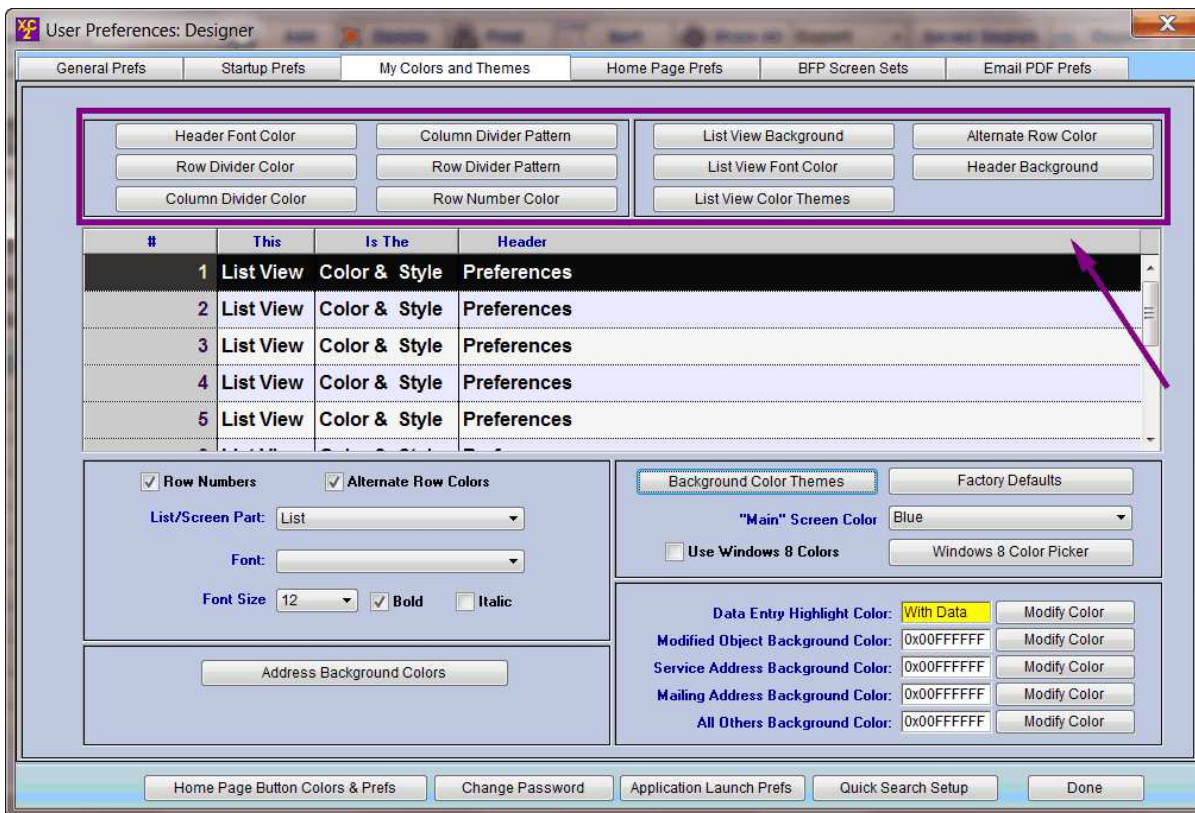
Choose different background colors in the lower right corner



Notes:

Choose a Pre-Programed Color Theme

If you don't feel like creating your own theme, you can choose a pre-programed theme for a quick makeover.

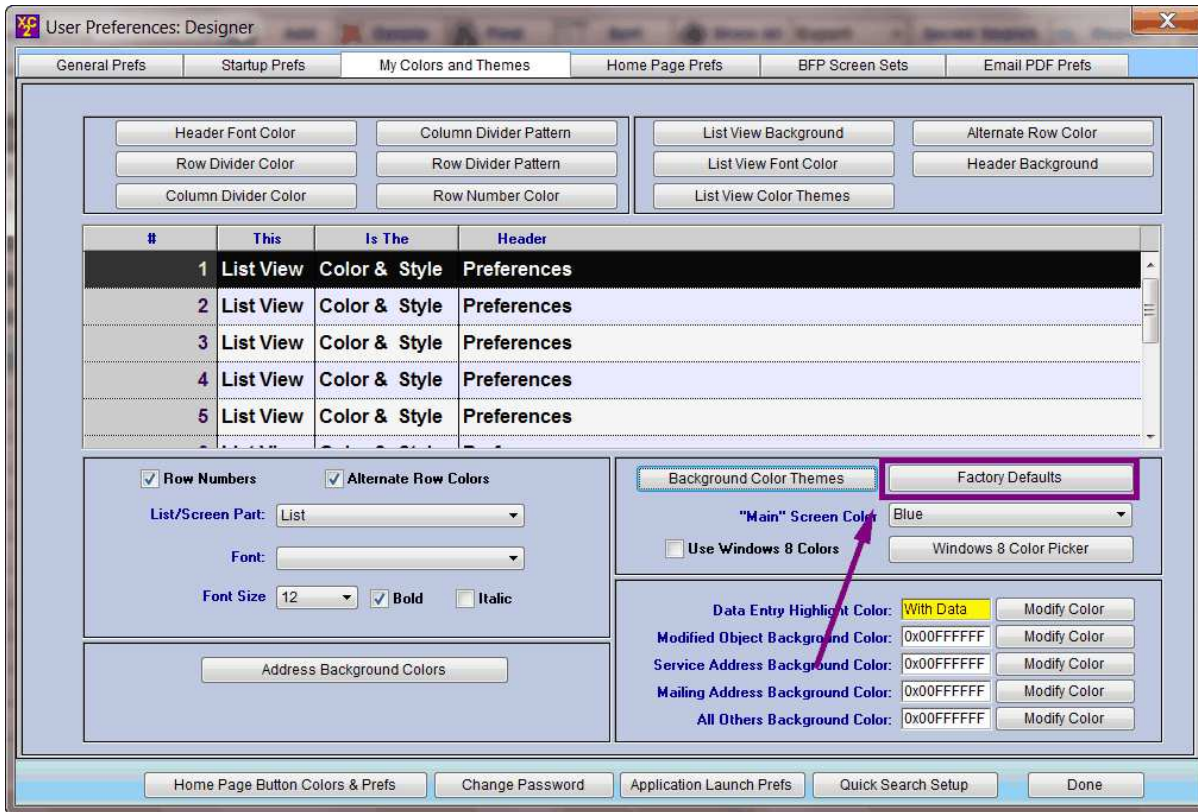


Notes:

[Back to Factory Default Settings](#)

The way you choose to change your settings is entirely up to you so play around with your settings.

Remember, if you realize at some point that you have gone to far, click on the Factory Defaults button and XC2 will bring you back to the original look.



Notes:



XC2 Software Knowledge Base



Quick Search Setup

KB Asset ID: 3015

XC2's EZ Search can be customized so the most-used search parameters can be quickly selected.

Why Customize Your Search List?

Everyone uses XC2 EZ Search differently. For example, you may prefer to search for Assemblies using a Facility Name while others may prefer to search by Serial Number.

Whatever your preference, each user account has the option to choose their own search options in XC2's EZ search.

Below shows XC2's EZ Search on the Main Screen.

The screenshot shows the XC2 EZ Search interface. At the top, there are buttons for 'Add', 'Delete', 'Find', 'Sort', 'Show All', 'Export', 'Saved Search', and 'Report'. Below these is a 'Saved Searches' list on the left and a main table of facilities. A dropdown menu is open over the 'Find' field, showing search options: 'Facility Name', 'Service Address Num Alpha', 'Service Address Street Name', and 'Facility Account Number'. A red arrow points from the 'Facility Name' option in the dropdown to the 'Facility Name' column header in the table.

#	Facility Name	Addr (#)	Street	Survey Date	Last Survey Date
1	Rainbow Rebuilders	6694	Abbotsf	2/22/2011	12/22/2011
2	Lamar Ventures	2941	Adara	03/02/2011	03/02/2011
3	Screenplay Video Centers	7805	Arche	1 11-Nov	11/16/200
4	Ollie's Roundup	9451	Banbridge	1 11-Nov	11/13/2011
5	29th Ave Liquor	4880	Beech Ridge	2 02-Feb	10/12/2011
6	Hospitality Group Inc The	29	Calli Glen	1 10-Oct	03/28/2013
7	Steward Painting & Restoration	3727	Carter's Corne	2 06-Jun	03/28/200
8	Lakewood Family Medical Clinic Pc	7846	Champions	1 01-Jan	12/21/2015
9	Mex Imports	6471	Chant	2 12-Dec	01/06/2013
10	Mercer William M Incorporated	5707	Chatham	1 01-Jan	02/23/2013
11	Tafoya Electric CHANGE	1795	Church View	1 05-May	08/02/2011
12	Rains-Flo Packings	5102	Clark-Shaw	1 12-Dec	11/15/200
13	Steele Elementary School	6916	Crooked Elm	2 03-Mar	02/08/2013
14	Weber Management Company	6679	Cross Creek	1 04-Apr	03/17/2013
15	Lingerie Etc	1760	Cuyuga	1 12-Dec	01/27/2013
16	T-M Service CO	1328	Dogwood	1 05-May	02/17/2013
17	Sears J L & Associates Real Estate	7323	Fairway	1 08-Aug	08/24/200
18	New Again Auto Re-Con Systems	881	Fawn Meadow	1 10-Oct	10/12/2011
19	Sloan Paul & Charlene Sloan	4903	Federal	1 06-Jun	08/03/200
20	A & B Forest Erach CO	4415	Ferguson	1 08-Aug	08/03/200

Notes:

User Preferences

To customize XC2's EZ Search

Go to Users Options

My Colors and Themes

The screenshot shows the 'User Options' menu on the left side of the application window. The menu items are:

- User Options
- My Colors and Themes
- XC2 Module
- Home Page Full Buttons
- Home Page Minimum Buttons
- Home Page Express
- Fac - Hospital
- Bfp - Hospital
- Bfp - Commercial
- Fac - Residential
- Facilities With 2+
- Bfp - Residential

The main window displays a table of facilities with the following columns: #, Facility Name, Addr (#), Street, Site Qty, Sched Code, Next Survey Date, and Last Su. The table contains 17 records.

#	Facility Name	Addr (#)	Street	Site Qty	Sched Code	Next Survey Date	Last Su
1	Littleton Garage Door Service	6669	Scottwood	1	01-Jan	06/01/14	
2	Seniors in Community Living Inc	9095	Greyson	2	05-May	02/16/11	
3	Rainbow Rebuilders	6694	Abbotsford	2	01-Jan	12/22/11	
4	Storewise Software Inc	5038	Somerset	2	11-Nov	02/13/13	
5	Lakewood Family Medical Clinic Pc	7846	Champions	1	01-Jan	12/21/15	
6	Polymedica Industries Inc	2672	Hornsea	1	05-May	04/04/11	
7	Sheridan Sanitation District #2	7022	Ryan Meadow	1	03-Mar	03/08/13	
8	Peck Doran P C	1556	Inverness	1	06-Jun	02/17/11	
9	T-M Service CO	1328	Dogwood	1	05-May	01/18/13	
10	Mex Imports	6471	Chant	1	12-Dec	01/06/13	
11	Tafoya Electric	1795	Church View	1	05-May	08/02/11	
12	Taylor's Liquors	445	Perkins	1	01-Jan	07/08/12	
13	North Star Liquor	7698	Hunters	1	04-Apr		
14	LA Salle Partners	5622	Sterling Glen	1	02-Feb	03/06/13	
15	Screenplay Video Centers	7805	Archer	1	11-Nov		
16	Willie's Place	8488	Strathmoore	1	11-Nov	02/09/13	
17	Malecall II	9044	Kelsey	1	12-Dec	11/29/16	

Notes:

Select Quick Search Setup

Under General Preferences

Select Quick Search Setup

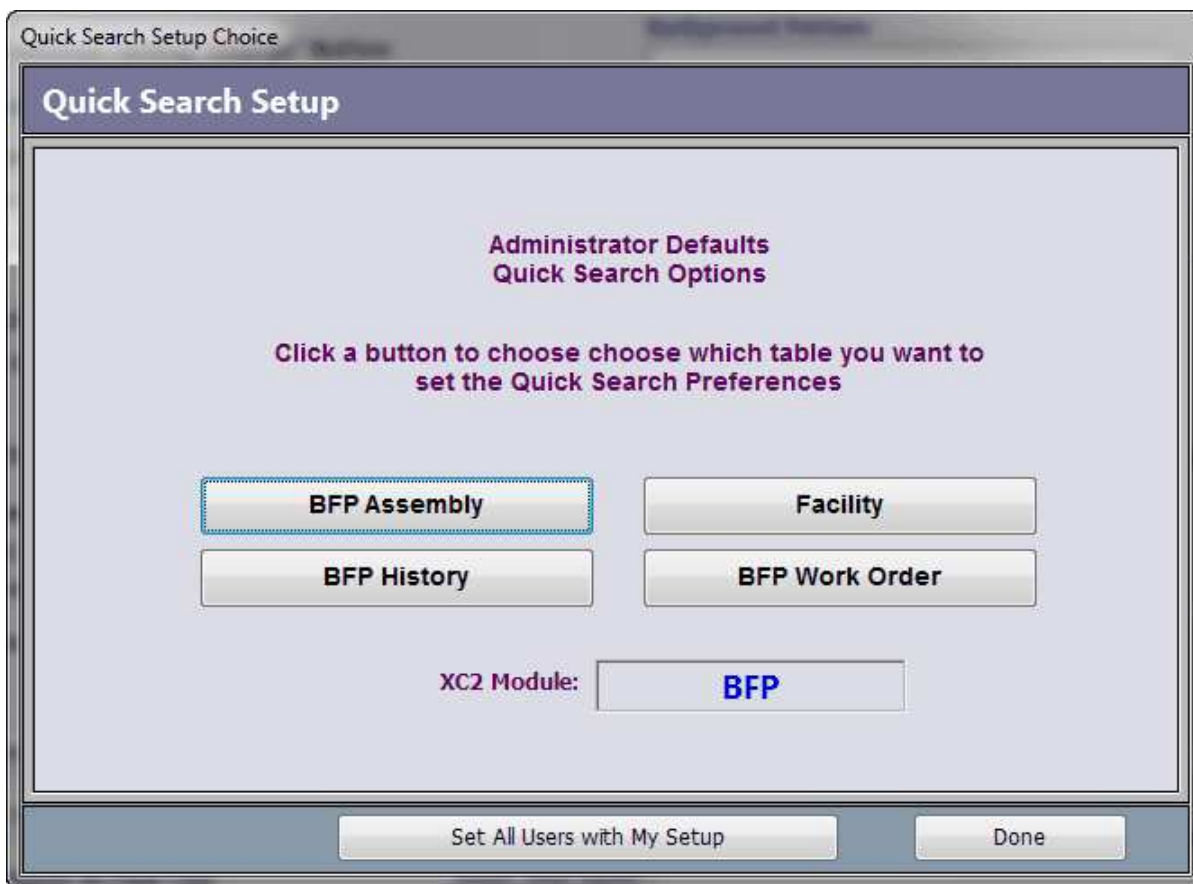


Notes:

Choose the Table

Choose the EZ Search List you would like to change.

i.e What type of record will you be searching for?



Notes:

XC2's Search Listing

Available Fields to add are on the left

Fields that are currently available are on the right

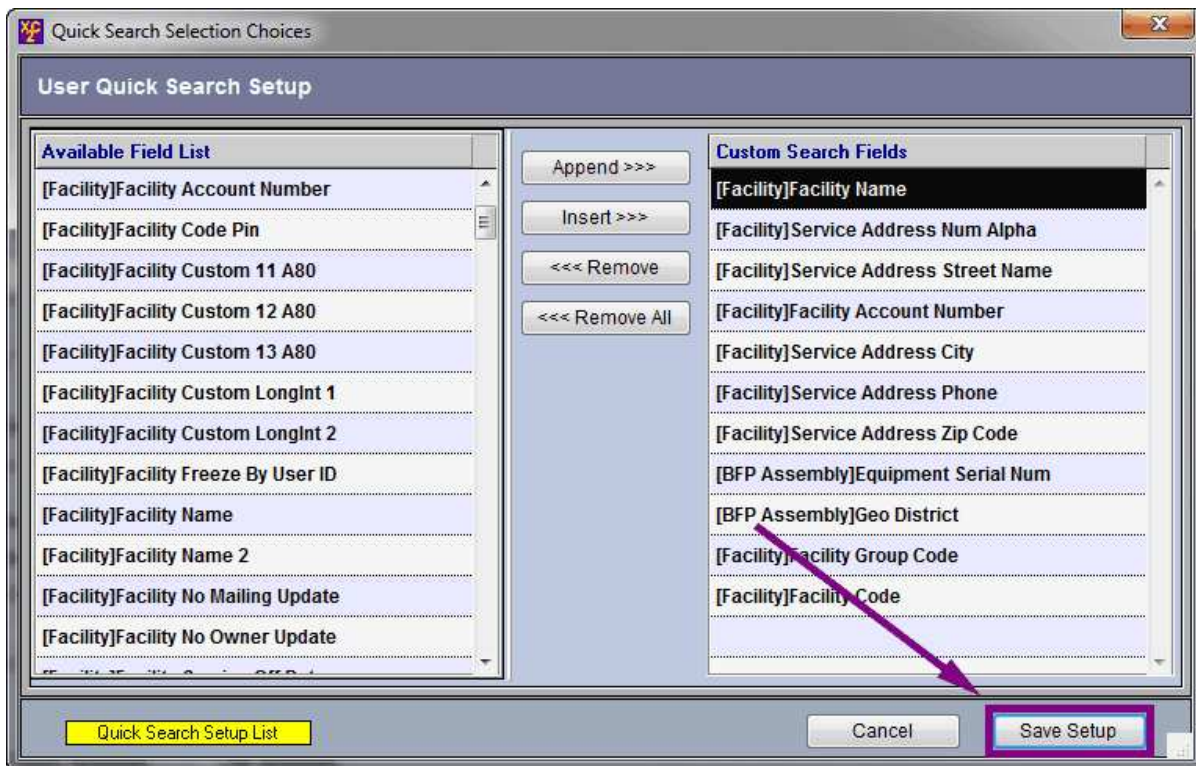
To add a Field: Highlight the field on the left, then click Insert

To remove a Field: Highlight the field on the right, then click Remove

You may also **rearrange** the fields **by clicking and dragging fields up or down**

Here I have added 7 new fields to XC2's Search Listing

When you have selected or rearranged your fields click Save Setup



Notes:

Change other Search Lists if Needed

You will be brought back to the Search Setup Screen

NOTE: If you would like to set ALL users to use the same search setup, click

- Set All Users With My Setup

Click Done when complete

Quick Search Setup Choice

Quick Search Setup

Administrator Defaults
Quick Search Options

Click a button to choose which table you want to set the Quick Search Preferences

BFP Assembly **Facility**

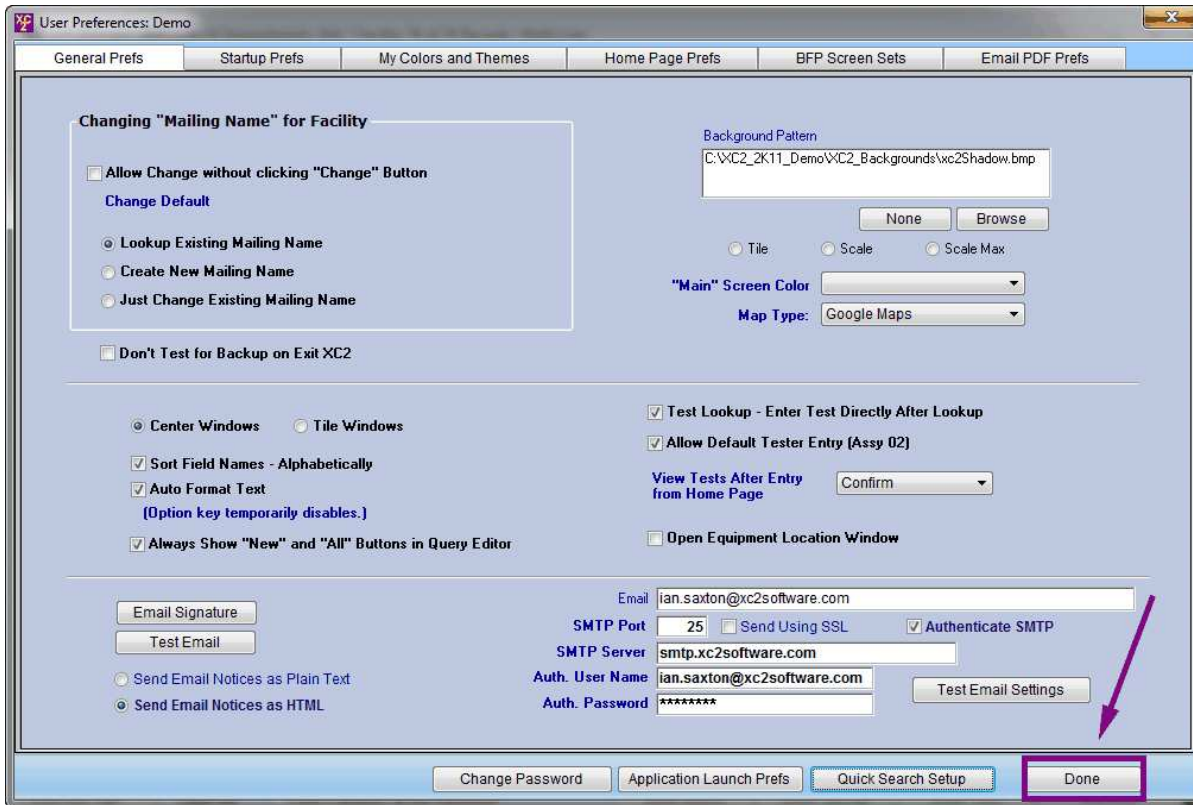
BFP History **BFP Work Order**

XC2 Module: **BFP**

Set All Users with My Setup Done

Notes:

Click Done to Close User Prefs



Notes:

New Quick Search Setup Items

The screenshot shows the XC2 Software interface for BFP (Backflow Prevention) management. The main window displays a list of 74 facilities. A search dropdown menu is open, showing various search criteria. A purple box highlights the search criteria, and a purple arrow points from the 'Facility List' button in the left sidebar to the search dropdown.

Search Criteria (from dropdown menu):

- Facility Name
- Service Address Num Alpha
- Service Address Street Name
- Facility Account Number
- Service Address City
- Service Address Phone
- Service Address Zip Code
- Equipment Serial Num
- Geo District
- Facility Group Code
- Facility Code

Facility List (from main table):

#	Facility Name	Addr (#)	Street	Survey Date	Last Survey Date
1	Rainbow Rebuilders	6694	Abbotsfo	12/22/2011	12/22/2011
2	Lamar Ventures	2941	Adara	03/02/2014	03/02/2014
3	Screenplay Video Centers	7805	Archer	11/16/200	11/16/200
4	Ollie's Roundup	9421	Banbridg	11/13/2011	11/13/2011
5	29th Ave Liquor	4880	Beech Ri	10/12/2011	10/12/2011
6	Hospitality Group Inc The	429	Calli Glen	03/28/2013	03/28/2013
7	Steward Painting & Restoration	727	Carter's Corne	06-Jun	
8	Lakewood Family Medical Clinic Pc	7846	Champions	01-Jan	12/21/2015
9	Mex Imports	6471	Chant	12-Dec	01/06/2013
10	Mercer William M Incorporated	5707	Chatham	01-Jan	02/23/2013
11	Tafoya Electric CHANGE	1795	Church View	05-May	08/02/2011
12	Rains-Flo Packings	5102	Clark-Shaw	12-Dec	11/15/200
13	Steele Elementary School	6916	Crooked Elm	03-Mar	02/08/2013
14	Weber Management Company	6679	Cross Creek	04-Apr	03/17/2013
15	Lingerie Etc	1760	Cuyuga	12-Dec	01/27/2013
16	T-M Service CO	1328	Dogwood	05-May	02/17/2013
17	Sears J L & Associates Real Estate	7323	Fairway	08-Aug	08/24/200
18	New Again Auto Re-Con Systems	881	Fawn Meadow	10-Oct	10/12/2011
19	Sloan Paul & Charlene Sloan	4903	Federal	06-Jun	
20	A & B Forest Erach CO	4415	Ferguson	08-Aug	08/03/2014

Notes:



XC2 Software Knowledge Base



How To Change Login Passwords

KB Asset ID: 2108

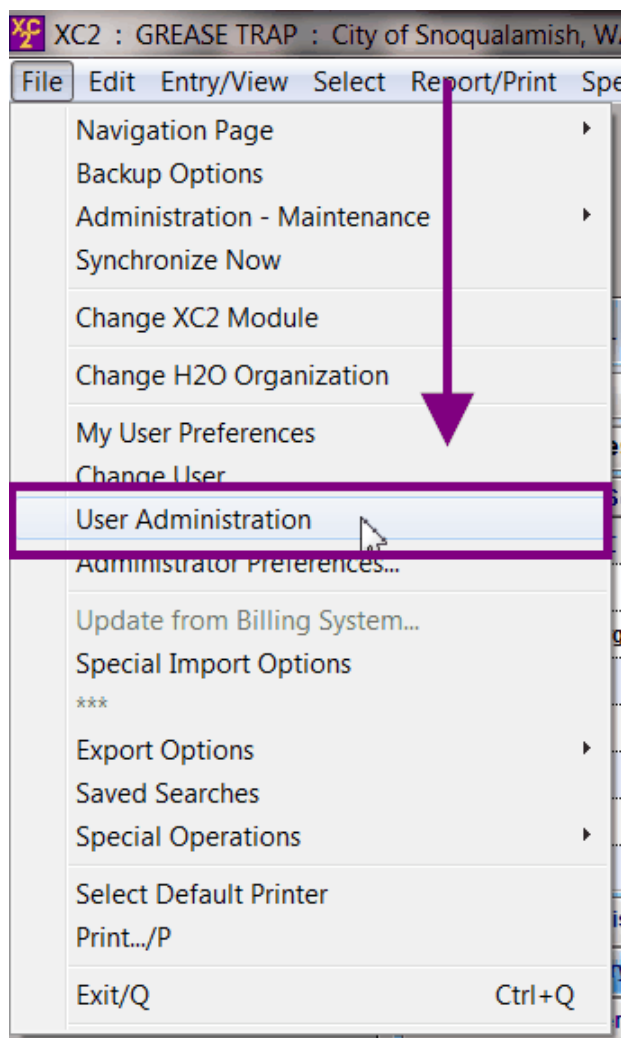
Page describes how to change a user login passwords in XC2

User Administration

Note: You need to be logged in as a Super Administrator to Access this function

Go up to the File Menu

Select User Administration



Notes:

Select User Account

Select the user login account you wish to add or change the password for.

The screenshot shows the 'User Options' window in the XC2 Software. The window title is 'XC2 Software - GREASE TRAP : City of Snoqualamish, WA: * User: 7 of 7 Records : Multi-Line : FILTER ON'. The interface includes a toolbar with buttons for Add, Delete, Find, Sort, Show All, Export, Saved Search, and Report. Below the toolbar, there are sections for 'Saved Searches' and a list of menu items on the left side, including Facility List, FSE Inventory List, Inspectors/Personnel, Waste Haulers, Vehicle List, Pump Out History, Inspection History, Notice Setup, Automatic Reminders, Administrator Setup, and Lookup/Setup Lists. The main area is a table with 7 records. The 7th record, 'Waldo Bennett', is highlighted with a purple border. A purple arrow points to the 'H2O Organization' column for the 6th record, 'Demo'.

#	User Name	Initials	Access	Log Date	Log Time	XC2 Module	H2O Organization	H
1	Administrator	ADM	Administrator	08/20/1998	7:25 AM	BFP		
2	Entry	ENT	Entry		12:00 AM	BFP		
3	Joebob	JB	Entry	04/27/2011	4:41 AM	GREASE TRAP		
4	Guest	GUE	Guest	10/20/1999	1:29 PM	BFP		
5	Manager	MGR	Manager	01/07/1999	9:05 AM	BFP		
6	Demo	DEMO	Super Admin	10/30/2013	10:48 AM	GREASE TRAP		
7	Waldo Bennett	WB	Super Admin	09/20/2011	12:07 PM	BFP		

Notes:

Click Password

Click Password

XC2 Software - GREASE TRAP : Waldo Bennett : WB : Super Admin : 7 of 7 Selected

Home Page Buttons | H2O Org. Access | Email/PDF Prefs | BFP Screen Sets

User Info | Startup Prefs | Task Access Rights | XC2 Module Access | Table Access Rights | List/View Prefs

Required (*) Personnel ID: 100002
User ID: 100002

User Administration/Passwords

User Log On Name (*) Waldo Bennett Initials/Code (*) WB Password
Personnel Record

User Full Name WALDO BENNETT
Access Level Super Admin Allow Access via ODBC (READ ONLY)
Phone
Email waldo.bennett@foobar.com
Employee Num Email Signature
Computer Name XC2-M6400-01
Computer Log On Randy Engle
Last Log On 09/20/11 12:07 PM Password Expiration Date

Default XC2Module BFP

Don't Test for Backup on Exit
 Sort Field Names - Alphabetically
 Auto Format Text
 Test Lookup - Enter Test Directly After Lookup
 Always Show "New" and "All" Buttons in Query Editor

User - LG - 01 | New Record | Search | Report/Print | < | << | >> | > | Cancel | Save

Notes:

Change your password

Change your Password and click OK



Notes:



XC2 Software Knowledge Base



How To Change Your Own Password

KB Asset ID: 3629

There may be times you will need or want to update your XC2 user login password.

Login Password

Click the File Menu

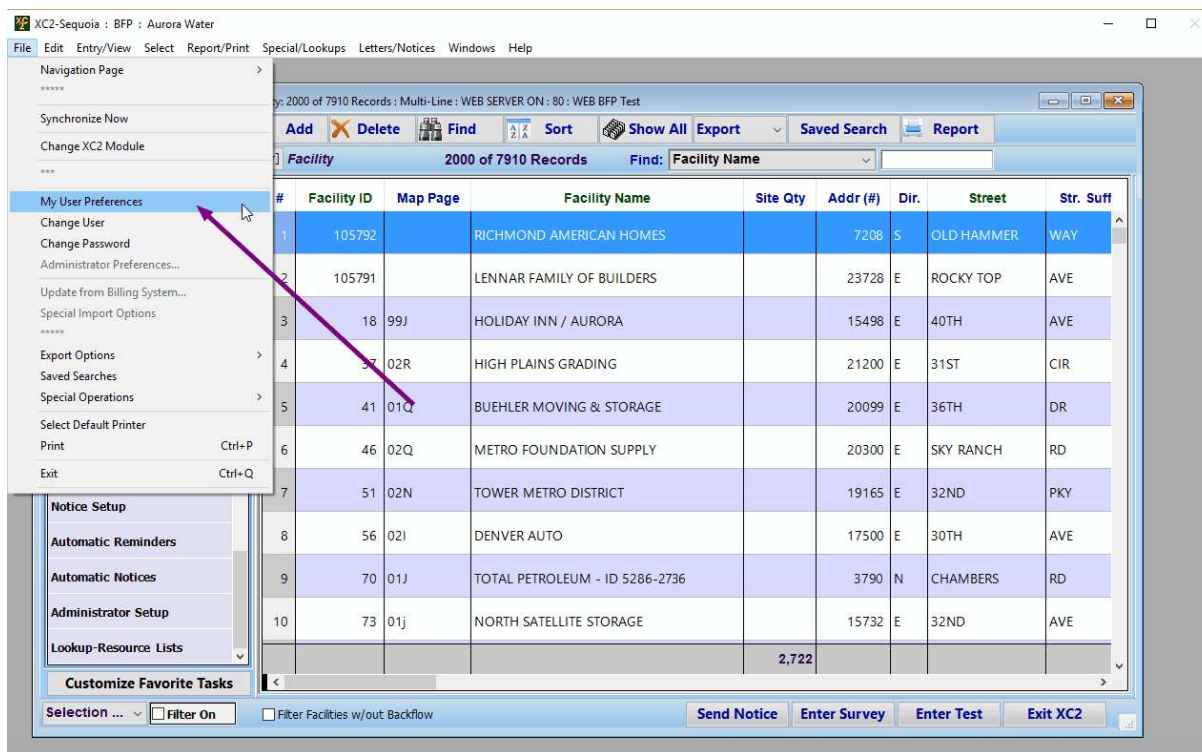
The screenshot shows the XC2 software interface. The title bar reads "XC2-Sequoia : BFP : Aurora Water". The menu bar includes "File", "Edit", "Entry/View", "Select", "Report/Print", "Special/Lookups", "Letters/Notices", "Windows", and "Help". The "File" menu is highlighted with a red arrow. Below the menu bar is a toolbar with buttons for "Add", "Delete", "Find", "Sort", "Show All", "Export", "Saved Search", and "Report". The main window displays a table of facility records. The table has columns for "#", "Facility ID", "Map Page", "Facility Name", "Site Qty", "Addr (#)", "Dir.", "Street", and "Str. Suffix". The table contains 10 rows of data, with a total of 2,722 records shown at the bottom. On the left side, there are panels for "Run Selected Search", "Favorite Tasks", and "Customize Favorite Tasks".

#	Facility ID	Map Page	Facility Name	Site Qty	Addr (#)	Dir.	Street	Str. Suffix
1	105792		RICHMOND AMERICAN HOMES		7208	S	OLD HAMMER	WAY
2	105791		LENNAR FAMILY OF BUILDERS		23728	E	ROCKY TOP	AVE
3	18	99J	HOLIDAY INN / AURORA		15498	E	40TH	AVE
4	37	02R	HIGH PLAINS GRADING		21200	E	31ST	CIR
5	41	01Q	BUEHLER MOVING & STORAGE		20099	E	36TH	DR
6	46	02Q	METRO FOUNDATION SUPPLY		20300	E	SKY RANCH	RD
7	51	02N	TOWER METRO DISTRICT		19165	E	32ND	PKY
8	56	02I	DENVER AUTO		17500	E	30TH	AVE
9	70	01J	TOTAL PETROLEUM - ID 5286-2736		3790	N	CHAMBERS	RD
10	73	01j	NORTH SATELLITE STORAGE		15732	E	32ND	AVE
				2,722				

Notes:

Open User Preferences

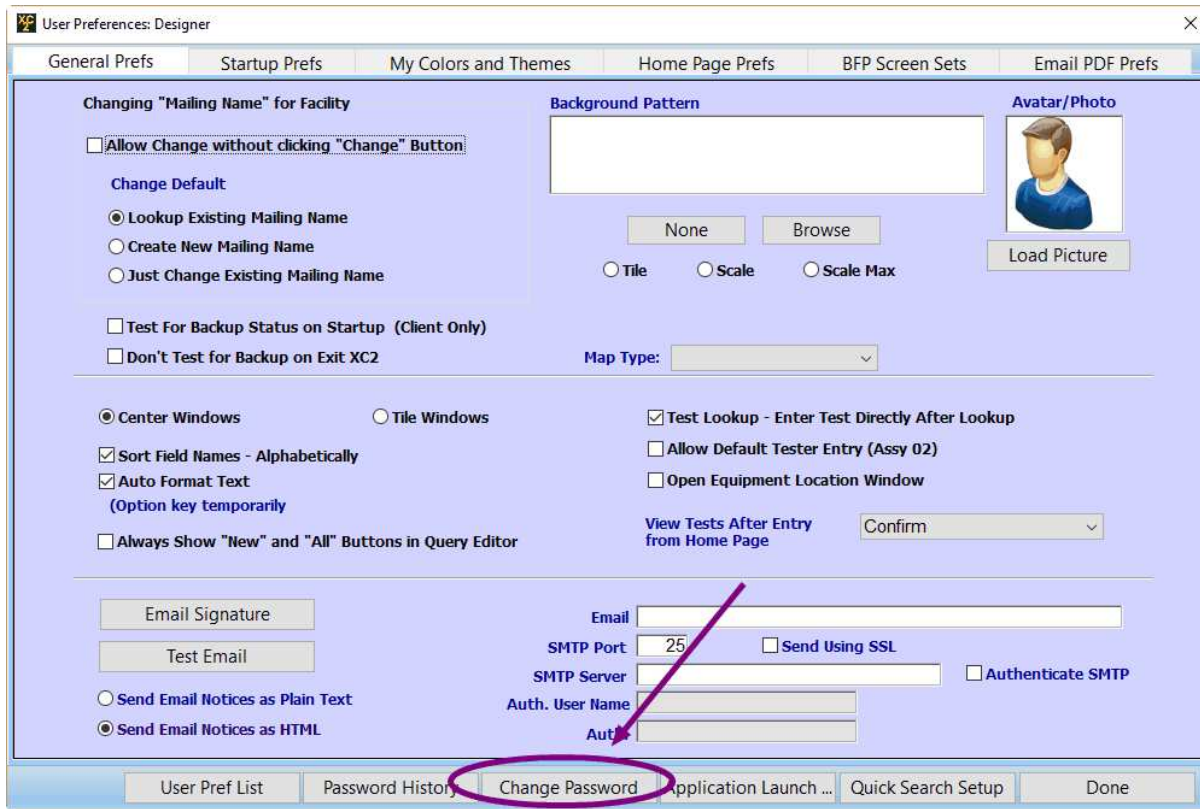
Click My User Preferences



Notes:

Change Password

Click the Change PASSword button.



Notes:

Enter New Password

Enter you new password in the top line then again to confirm

Click OK

XC2-*Sequoia*

Please enter the NEW Password for:
Administrator

User Name: Administrator

Password: *****

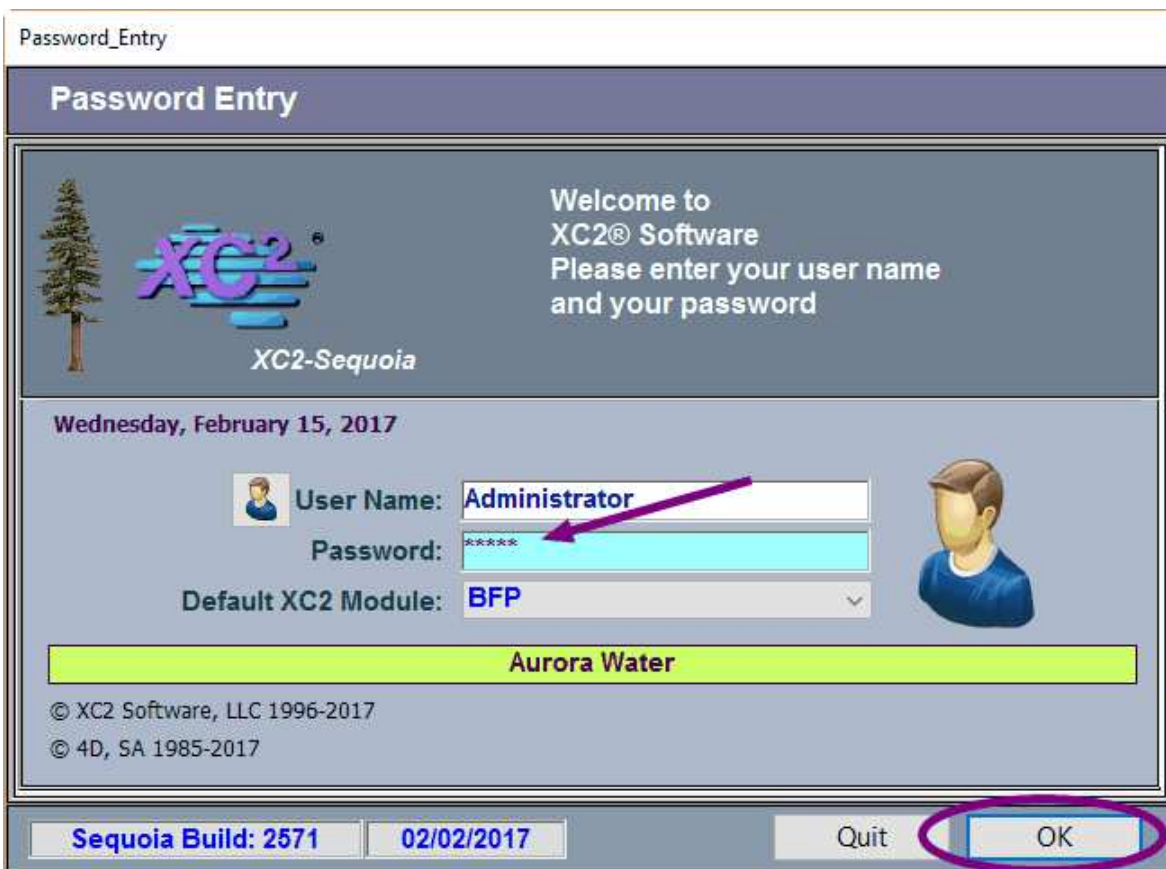
Confirm Password:

Cancel OK

Notes:

Log Out Then Log Back In

The next time you log back into XC2 you will enter your new password .



Notes:



XC2 Software Knowledge Base



Avatar - Username Feature

KB Asset ID: 3289

This page describes how to add a picture to your user account, and have your picture and user name show up in a pick-list on the password entry screen.

Avatar on Login

If you would like to add an Avatar / picture to your XC2 login screen, we have a new feature that will allow you to do that.



Notes:

Log In with Username and Avatar

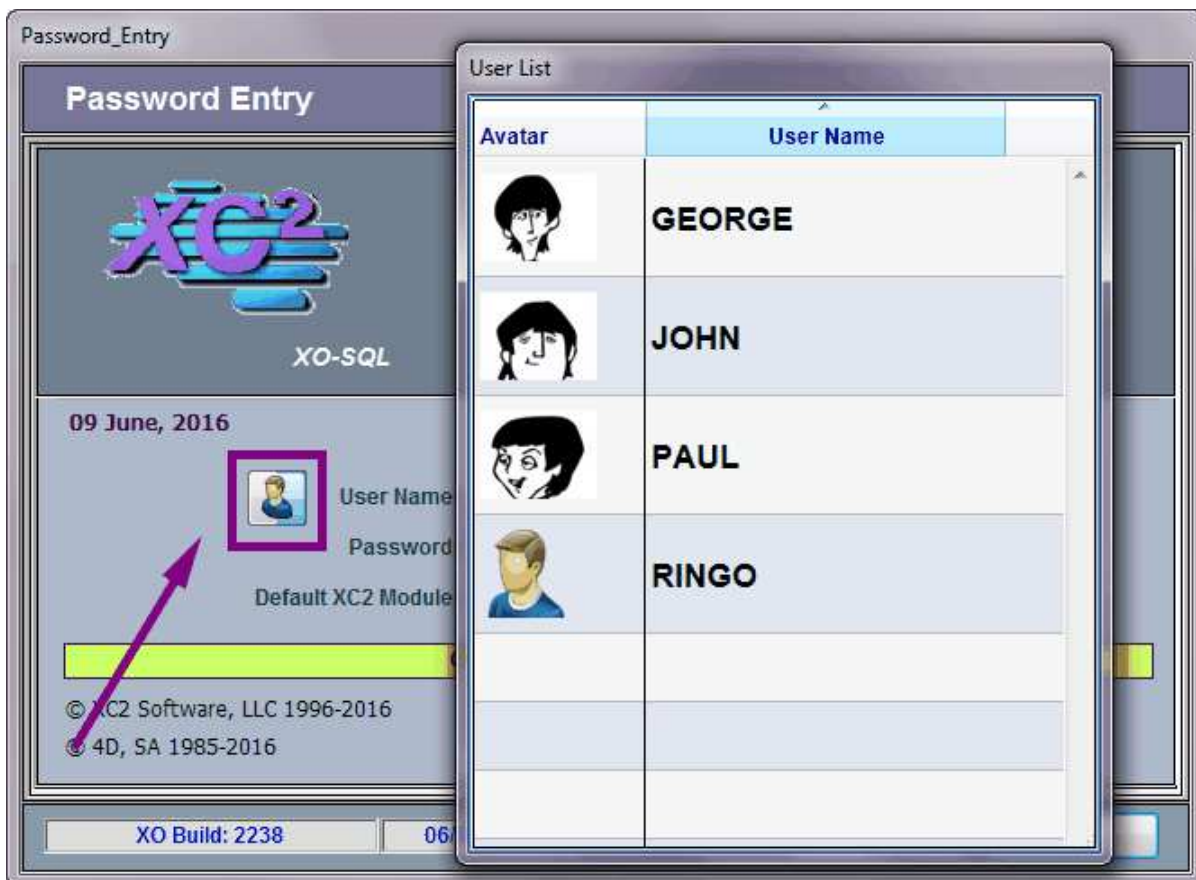
This page describes how to add a picture to your user account, and have your picture and user name show up in a pick-list on the password entry screen.

Forgot your "user name"? No problem. A single click displays all user name with their picture/photo/avatar.

On the Login screen, if you click the Avatar button, XC2 will pull up a list of all Users and their Avatars.

Double clicking on the user account will select that account.

If the User has not uploaded an Avatar, a default picture will be in place.

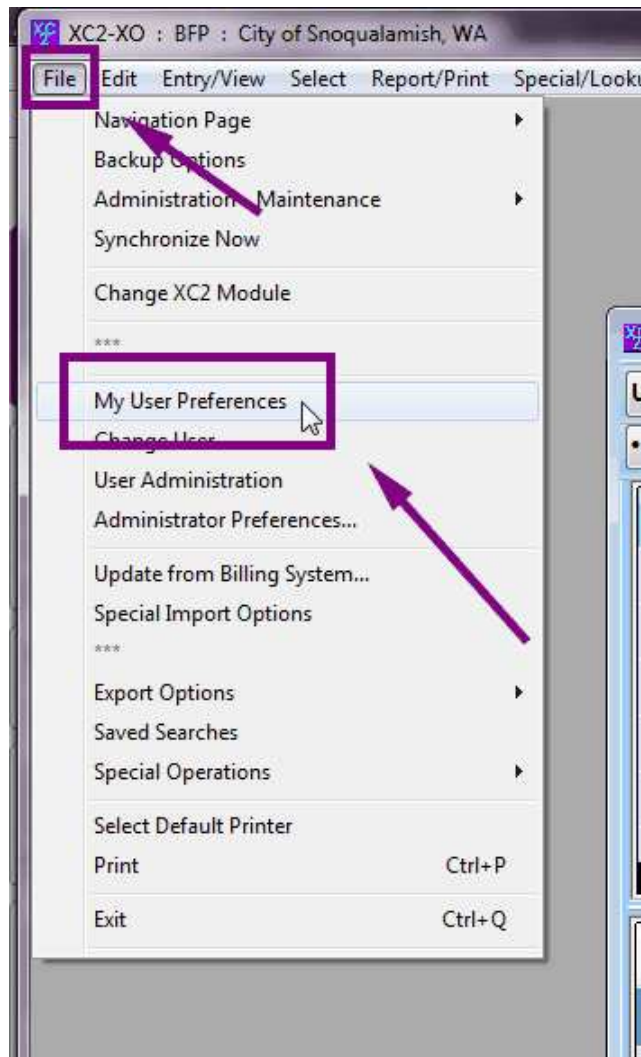


Notes:

How to upload your Avatar

Users can upload their picture in User Preferences

Go up to the File menu, select My User Preferences

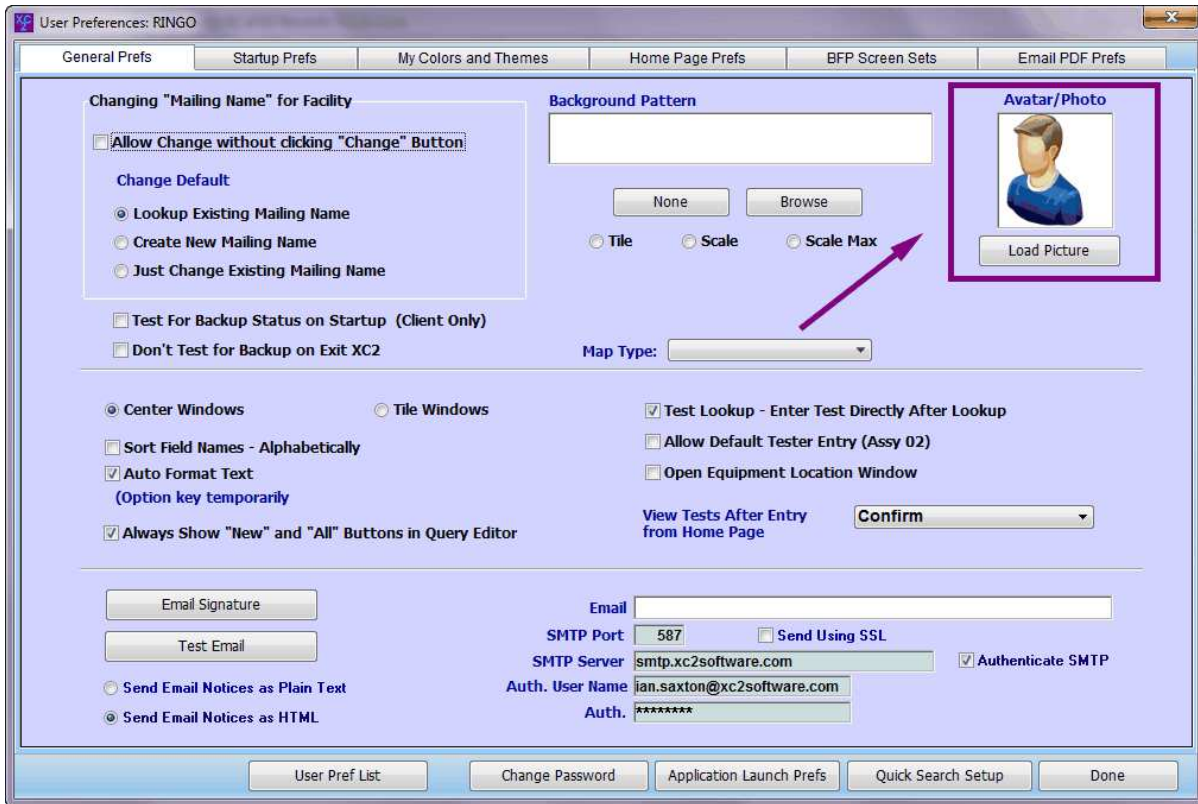


Notes:

Click Load Picture

In the top right corner

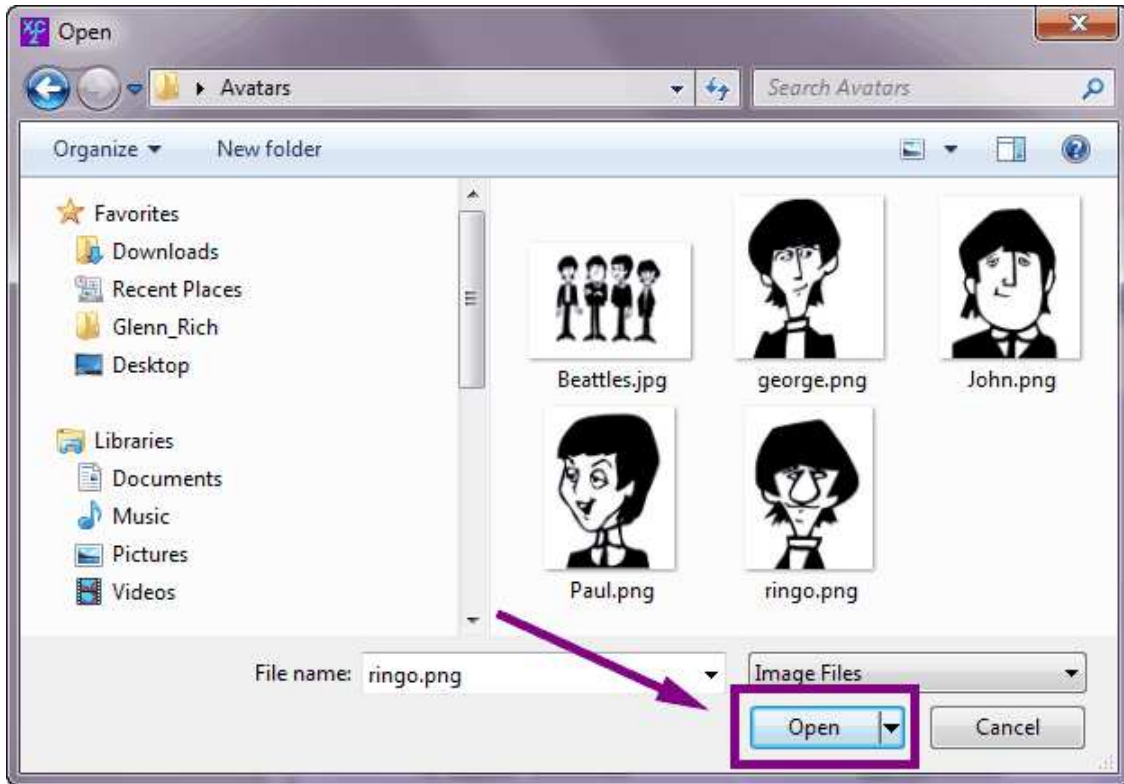
Click Load Picture



Notes:

Choose picture and click Open

Choose your picture and then click the Open button

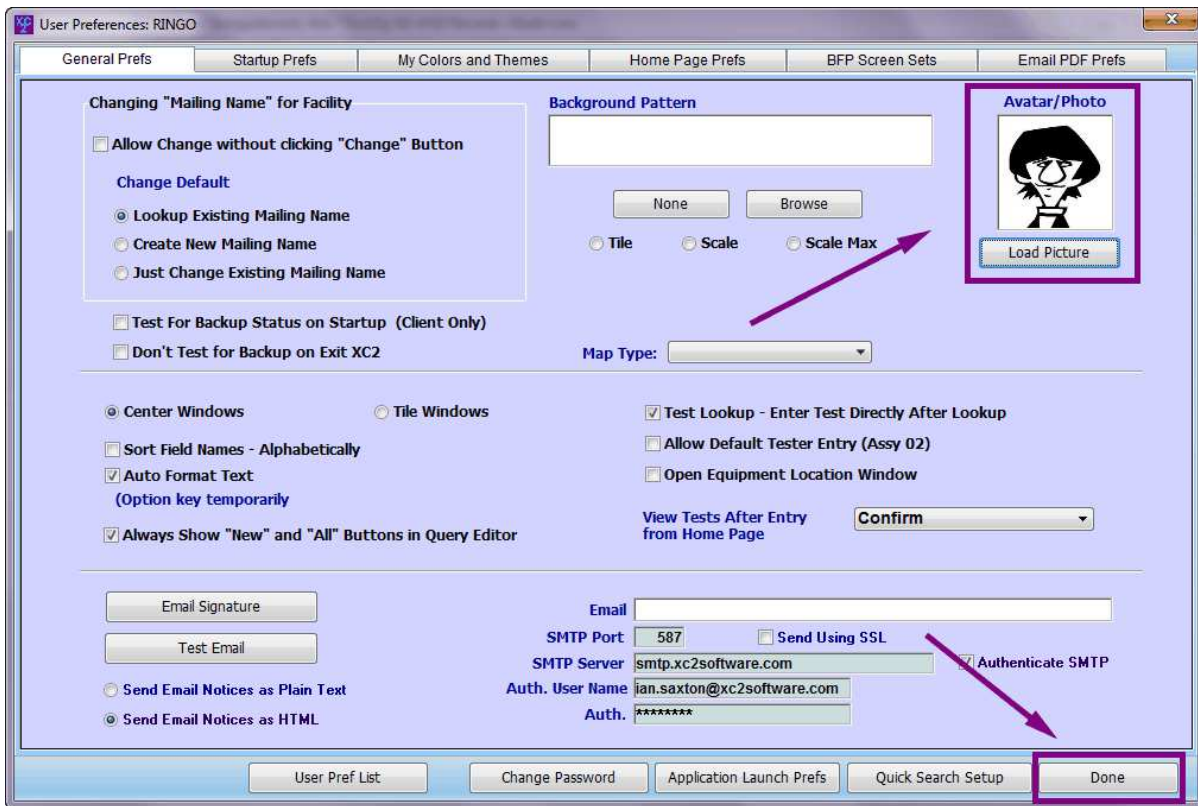


Notes:

Picture Will be Added

Your picture has been added

Click Done to save



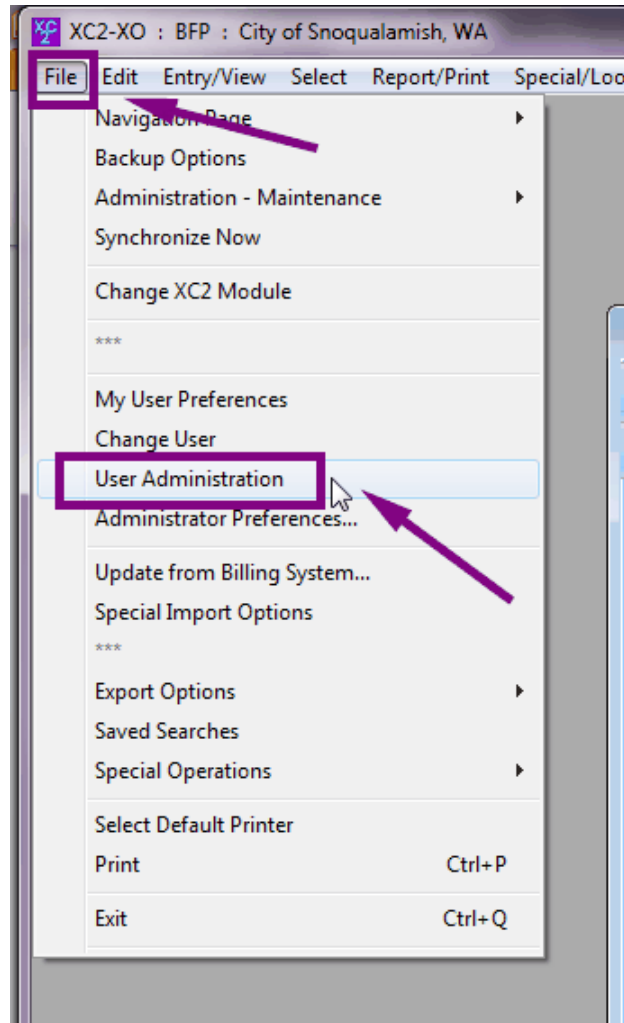
Notes:

Super Admin

If you are the Super Administrator, you may upload Avatars for all Users

Go up to the File menu

Select User Administration



Notes:

List of All Users

This is a list of all Current Users

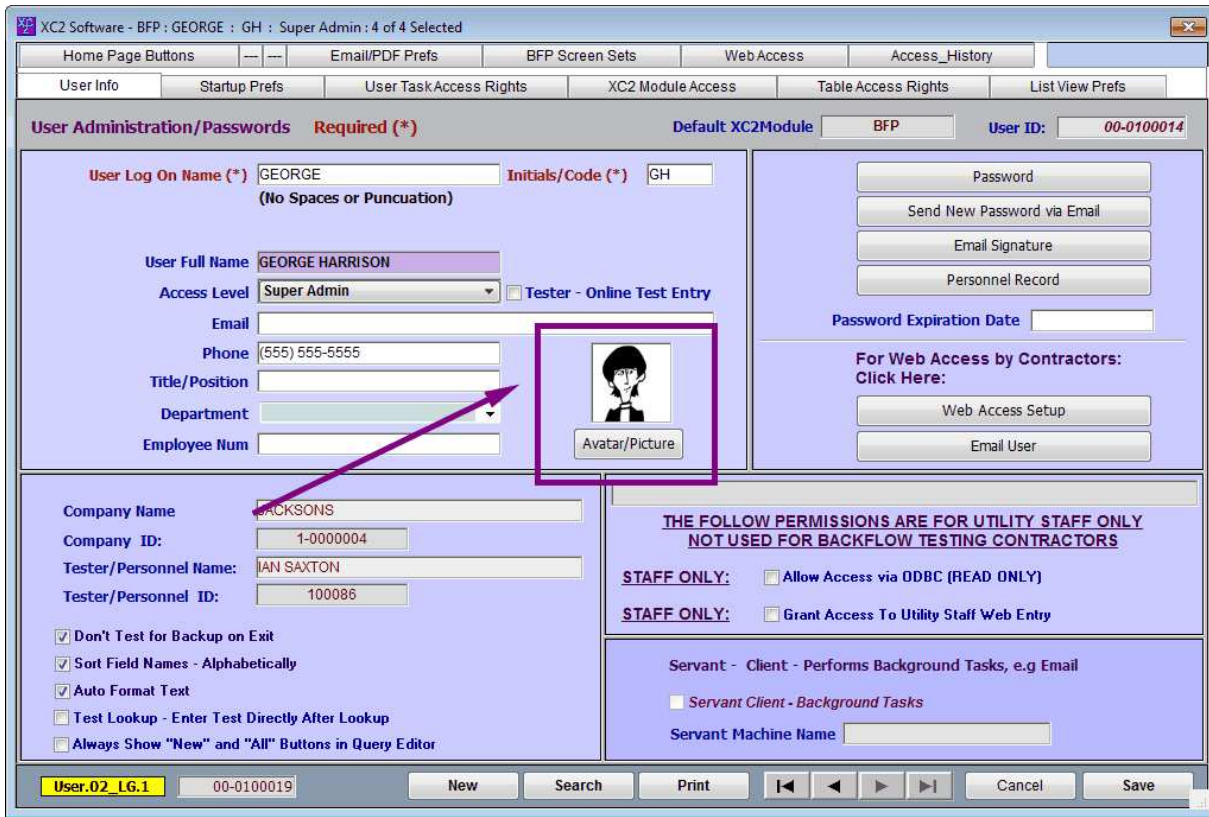
Double click on a record to open it

#	User Name	Initials	Email	Access	Last Date	Last Time
1	RINGO	RS		Super Admin	06/09/16	11:41 A
2	PAUL	PM		Super Admin	02/24/16	7:59 A
3	JOHN	JL		Super Admin	06/09/16	11:35 A
4	GEORGE	GH		Super Admin	04/28/16	1:28 P

Notes:

Change Avatar

Super Administrators can change every user Avatar by clicking Avatar/Picture



Notes:



XC2 User Manual

Searching

- **Quick Search from Main Screen**
- **EZ Search – Search Menu**
- **Multi Field Search**
- **Power Search 1**
- **Power Searches – Date Range**
- **Saved Searches**
- **Advanced Search Options**



XC2 Software Knowledge Base



XC2 Quick Search Feature

KB Asset ID: 2126

This Page describes how to perform a quick search from the main screen.

What is a Quick Search?

XC2's Quick Search is designed to narrow your search results as you type within the search bar.

The Quick Search Bar can be found in the upper right corner of the Main Window.

The screenshot shows the XC2 software interface with a search bar highlighted in purple. The search bar contains the text "Find: Facility Name" and a "Go!" button. Below the search bar is a table with the following columns: #, Facility Name, Addr (#), Street, Acct Number, Site Qty, Tap Num, and Sched Code. The table contains 20 rows of data.

#	Facility Name	Addr (#)	Street	Acct Number	Site Qty	Tap Num	Sched Code
1	San Demo Manor Nursing Hor	7974	Aitkin	02-014790-001	1	02-014790-001	10-Oct
2	Quick Wash Hand Clean	448	Amos		1		
3	Pizza Hut	2575	Baja	04-0278-30-001	1	04-0278-30-001	11-Nov
4	Billybob's Super Bbq	8888	Billybob				
5	Newton Detention Center	3992	Bridgeport		1		
6	Plain Nuts Catering	7417	Bridgewater	04-017264-001	1	04-017264-001	
7	Blimpie / Elm St	9023	Brindle	37723426	1	37723426	06-Jun
8	La Loma	2915	Bristol Bane		1		
9	Kiddie Castle	3763	Buck Run	02-014793-001	2	02-014793-001	06-Jun
10	Mad Dog B B Q	3261	Cahill	04-016427-003	1	04-016427-003	08-Aug
11	Dairy King	5503	Camden	04-016360-002		04-016360-002	05-May
12	Cousins	2260	Cavanaugh	01013171001	5	01013171001	06-Jun
13	El Charro Mexican Rest	7034	Chantry	04-016435-001	2	04-016435-001	05-May
14	Chevron Food Mart	1172	Charterhouse				
15	Autospa Car Wash	8147	Chasely	04-028859-001	1	04-028859-001	04-Apr
16	Fat Boys Bar Grill	2900	Chimera	04-016263-004	2	04-016263-004	04-Apr
17	Zaxby	279	Collingwood	02-030340-001	3	02-030340-001	09-Sep
18	Papa John's Usa	4872	Creekside	04-016311-001	1	04-016311-001	12-Dec
19	Shoney's #5237	3227	Daisy	02-014006-006	2	02-014006-006	06-Jun
20	Food Depot	3250	Darlington	04-016434-001	3	04-016434-001	08-Aug

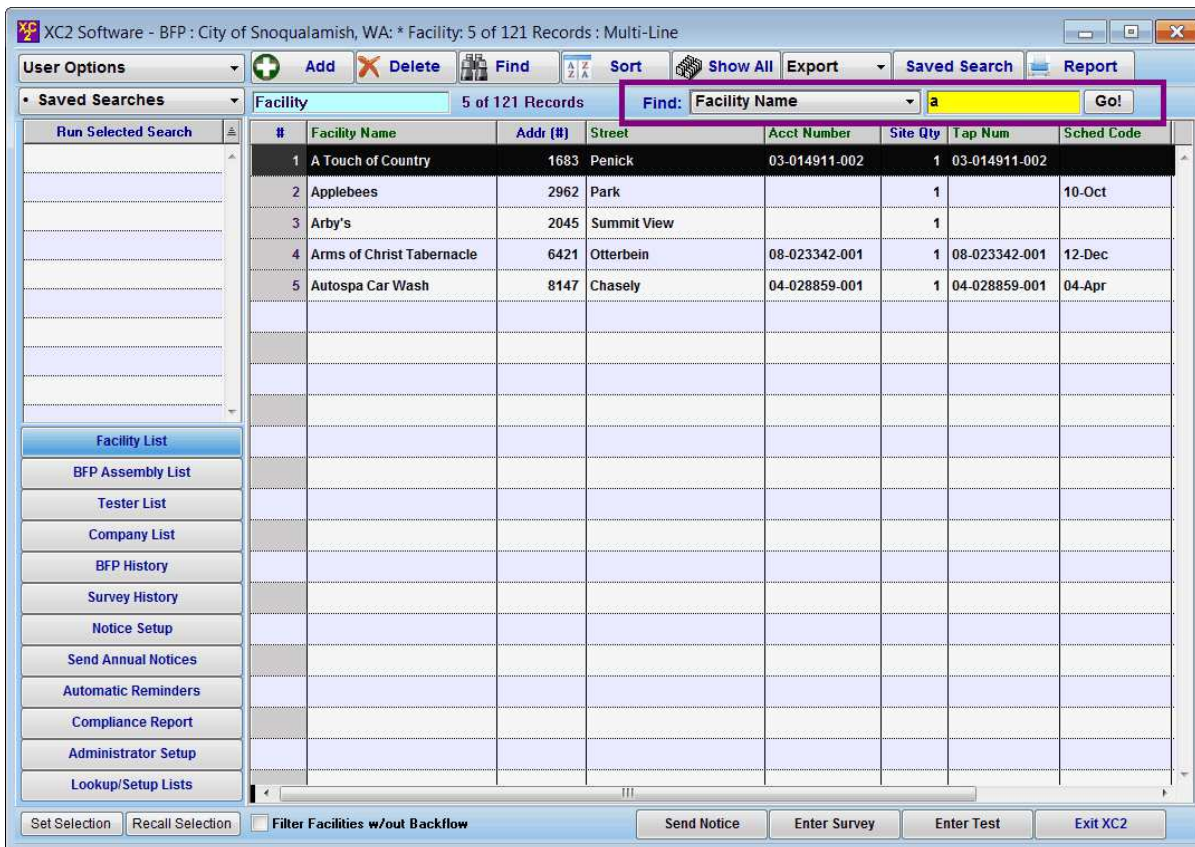
Notes:

How to Quick Search

First choose your search parameter

Next Start Typing

XC2 Will automatically narrow your search results as you type.



Notes:



XC2 Software Knowledge Base



XC2 EZ - How to Use XC2's EZ Search From Search Menu

KB Asset ID: 2611

Outlines how to use XC2's EZ Search

Search Window

Click find to access the Search Window

XC2 Software - BFP : * Facility: 92 of 92 Records : Multi-Line : WEB SERVER ON : 80 : WEB BFP Test

User Options [Add] [Delete] [Find] [Sort] [Show All] [Export] [Saved Search] [Report]

Exports [Facility] 92 of 92 Records Find: Facility Name

#	Facility Name	Addr (#)	Street	Site Qty	Sched Code
29	*NEW AGAIN AUTO RE-CON SYSTEMS	881	FAWN MEADOW	1	10-Oct
30	SLOAN PAUL & CHARLENE SLOAN	4903	FEDERAL	1	06-Jun
31	A & B FOREST FRESH CO	4415	FERGUSON	1	08-Aug
32	MIDWEST SALES CO	4557	FRANK		02-Feb
33	NATIONAL LENDER SERVICES INC --- CHANGE	5450	GRACE	1	04-Apr
34	SO FINE LIMOUSINE SERVICE - CHANGE	3947	GREENLAWN	1	04-Apr
35	SENIORS IN COMMUNITY LIVING INC	9095	GREYSON	2	01-Jan
36	OPUS ONE DESIGNS	3166	GUARD-WELL	1	09-Sep
37	RESOLUTION TRUST CORP	1905	HILLYER	1	08-Aug
38	1POLYMEDICA INDUSTRIES INC	2672	HORNSEA	1	05-May
39	NORTH STAR LIQUOR -----CHANGE	7698	HUNTERS BND -----CHANGE	1	04-Apr
40	1PECK DORAN P C	1556	INVERNESS	1	06-Jun
41	GRAPHIC DESIGNFEES	9044	KELSEY	1	12-Dec
				121	

Selection ... [Filter On] [Filter Facilities w/out Backflow] [Send Notice] [Enter Survey] [Enter Test] [Exit XC2]

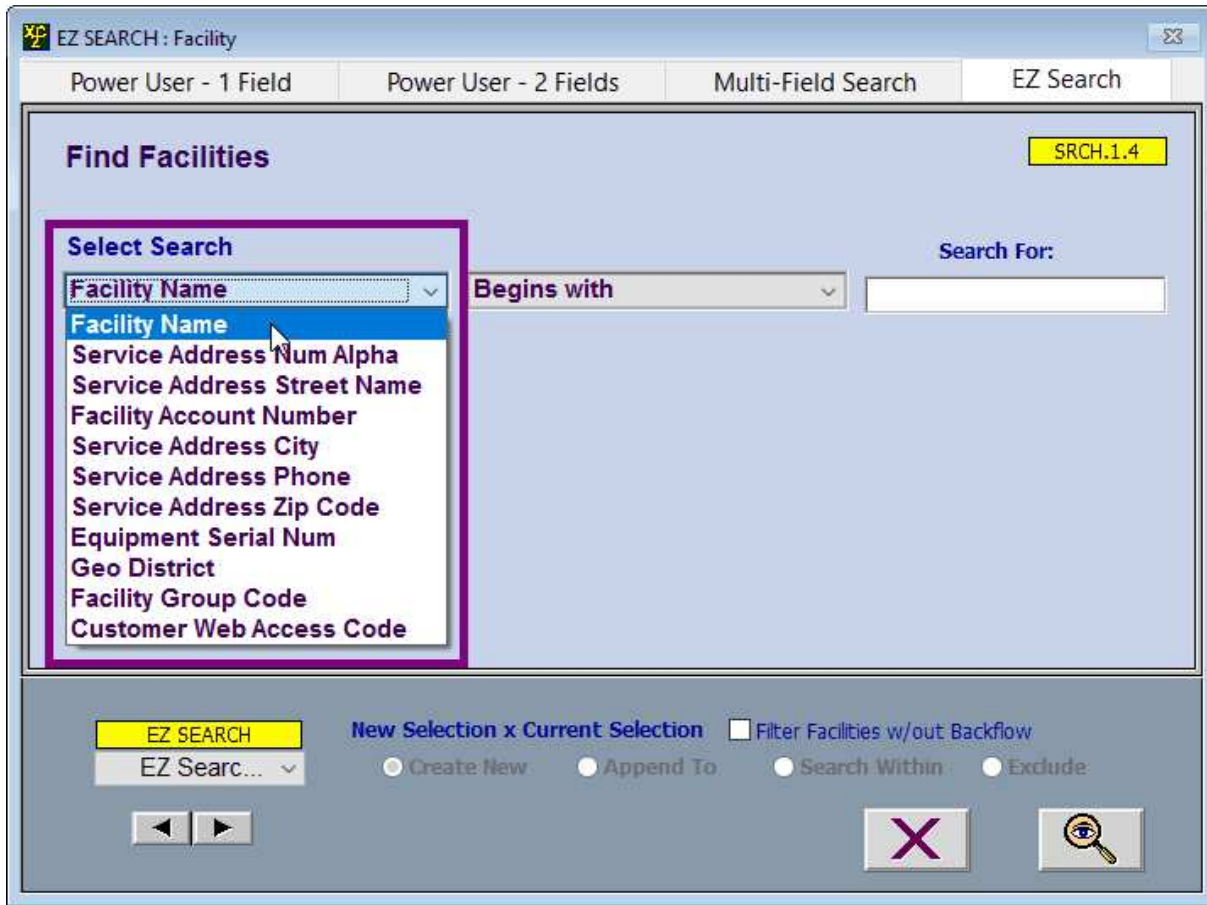
Notes:

EZ Search

XC2's EZ Search is the Most Basic Search option

Select a Search Criteria

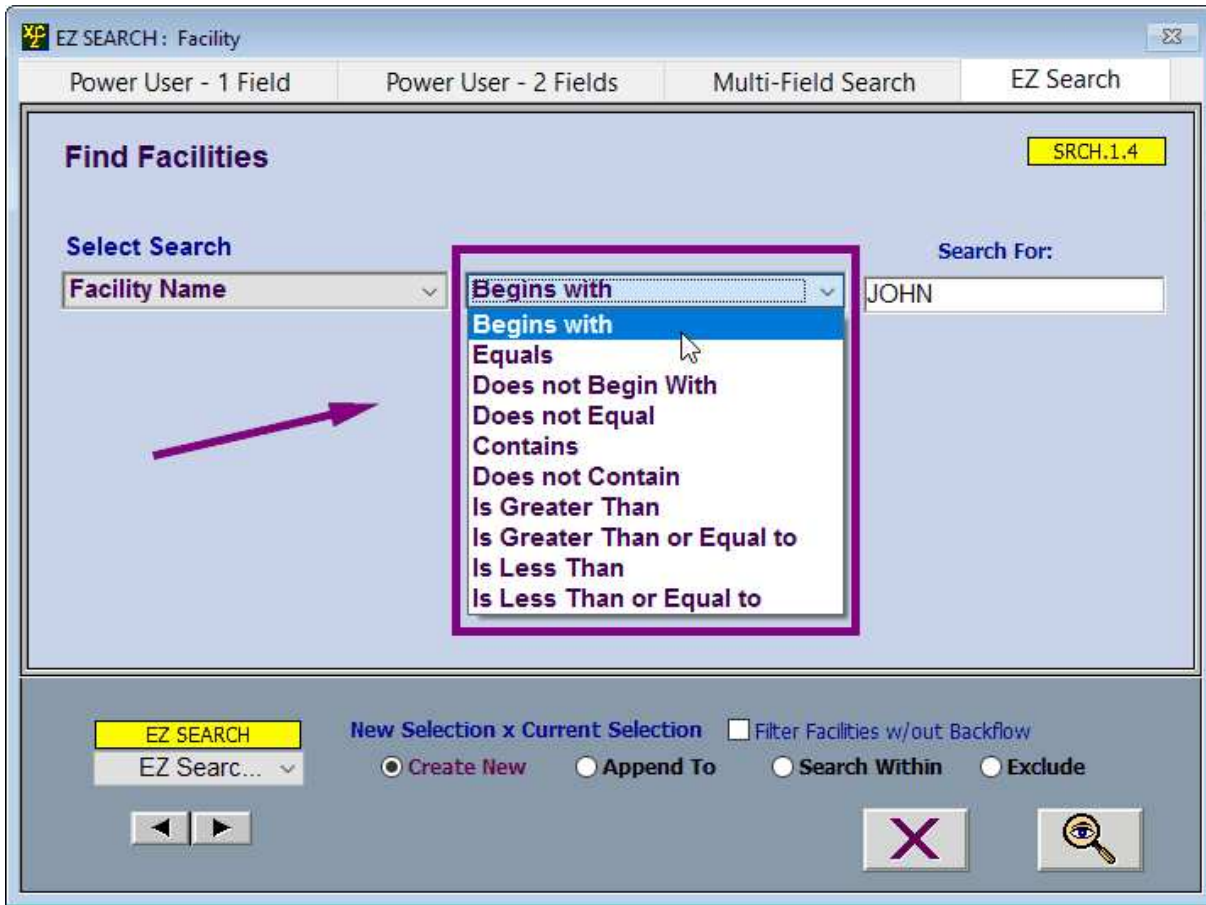
Note: Each User can customize their own EZ Search Options



Notes:

Select how you search

Select how you want XC2 to Search

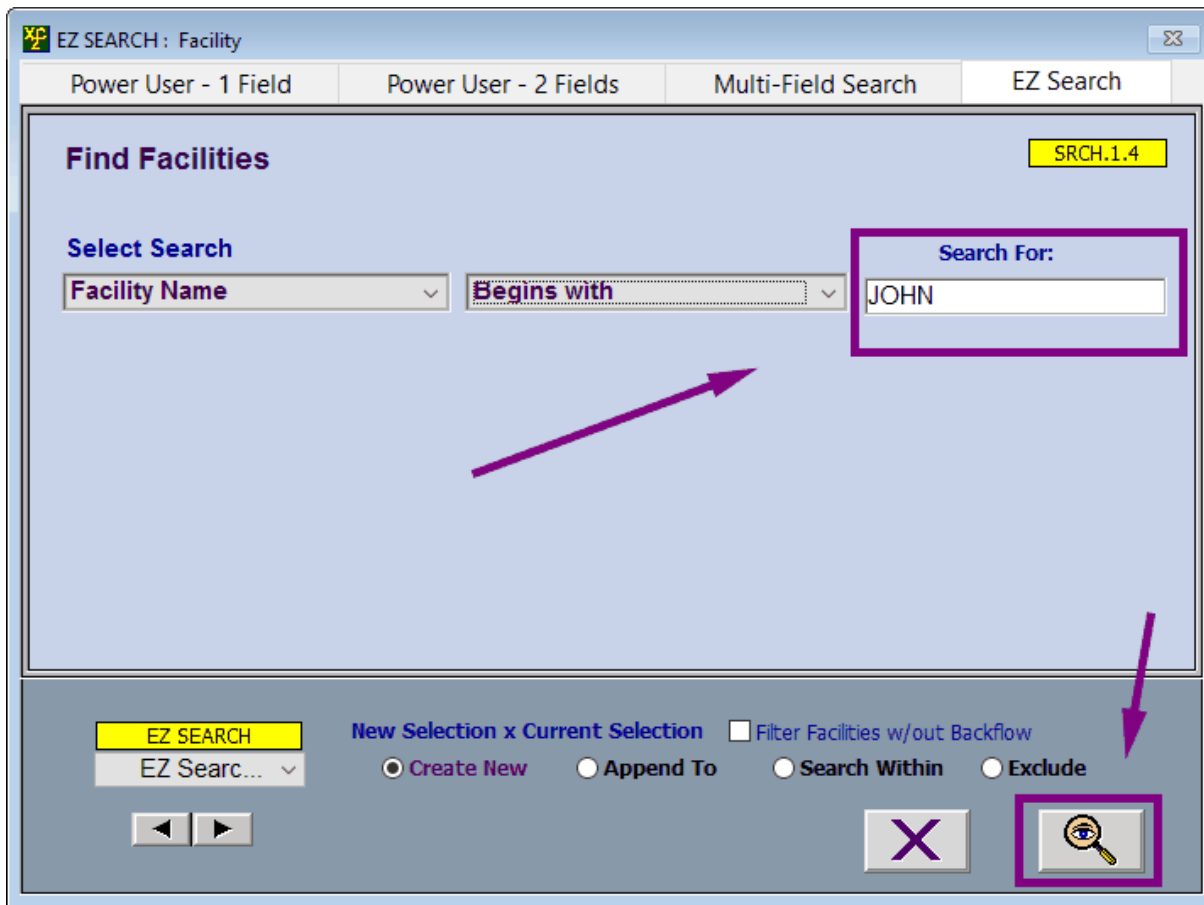


Notes:

Type what you want to find

Type you search value

click the magnifying glass to search



Notes:

Results will appear in the list view area

The screenshot shows the XC2 Software interface with a search results table. The window title is "XC2 Software - BFP : * Facility: 1 of 92 Records : Multi-Line : WEB SERVER ON : 80 : WEB BFP Test". The search criteria are "Facility Name" with the value "JOHN". The results table has the following columns: #, Facility Name, Addr (#), Street, and Site Qty. One record is highlighted in blue:

#	Facility Name	Addr (#)	Street	Site Qty
1	JOHNS GRILL	63 ELLIS		1

The interface also includes a left sidebar with "Run Selected Export" and "Favorite Tasks" sections, and a bottom toolbar with buttons like "Send Notice", "Enter Survey", "Enter Test", and "Exit XC2".

Notes:



XC2 Software Knowledge Base



Multi-Field Search

KB Asset ID: 3627

This page overviews XC2s multi-Field search option from within xc2's search menu

Click the Search Menu

The screenshot shows the XC2 software interface. The title bar reads "XC2 Software - BFP : * Facility: 92 of 92 Records : Multi-Line : WEB SERVER ON : 80 : WEB BFP Test". The menu bar includes "User Options", "Add", "Delete", "Find", "Sort", "Show All", "Export", "Saved Search", and "Report". The "Find" menu item is highlighted with a red box and a red arrow. Below the menu bar, the "Exports" section shows "Facility" and "92 of 92 Records". The "Find" field contains "Facility Name".

The main data table has the following columns: #, Facility Name, Addr (#), Street, and Site Qty. The table contains 12 rows of data, with a total of 121 records shown at the bottom right.

#	Facility Name	Addr (#)	Street	Site Qty
1	BOB O'S BBQ			
2	MCDONALDS			
3	HOBO'S DINER			
4	BOBS BBQ	25		1
5	RAINBOW REBUILDERS	6694	ABBOTSFORD	7
6	LAMAR VENTURES	2941	ADARA	
7	DEL-SCREENPLAY VIDEO CENTERS	7805	ARCHER	1
8	DEL-OLLIE'S ROUNDUP ----- CHANGE	9451	BANBRIDGE	1
9	29TH AVE LIQUOR	4880	BEECH RIDGE	1
10	FINNIGANS BELL PEPS	22222	BELL	6
11	TEST FACILITY	123	BOGUS	
12	BOGUS BURRITO	8878887	BURRITO	1
				121

The interface also includes a "Run Selected Export" section with options like "Create New Export", "Scheduled Exports", and "Export Current List View". A "Favorite Tasks" section lists various tasks such as "Facility List", "BFP Assembly List", and "BFP Testers List". At the bottom, there are buttons for "Send Notice", "Enter Survey", "Enter Test", and "Exit XC2".

Notes:

Multi-Field Search

Click the Multi-Field Search Tab

The screenshot shows a software window titled "MULTI-FIELD SEARCH : Facility". It has four tabs: "Power User - 1 Field", "Power User - 2 Fields", "Multi-Field Search" (which is highlighted with a purple box), and "EZ Search". The main area is titled "Find Facilities" and contains five search criteria, each with an equals sign and a text input field: "Facility Name", "Service Address Num Alpha", "Service Address Street Name", "Facility Account Number", and "Service Address City". The "Facility Name" field is highlighted in yellow. Below the fields are two radio buttons: "Must Match All" (selected) and "May Match Any". To the right is a "Clear Values" button. At the bottom, there is a "MULTI-FIELD SEARCH" dropdown menu, a "New Selection x Current Selection" label, a "Filter Facilities w/out Backflow" checkbox, and four radio buttons: "Create New" (selected), "Append To", "Search Within", and "Exclude". At the very bottom are four icons: a left arrow, a right arrow, a "New" button with a list icon, an "ALL" button with a folder icon, a purple "X" button, and a magnifying glass icon. A purple arrow points from the "Multi-Field Search" tab to the "Facility Name" field.

Notes:

Add up to 5 Items

You can add up to 5 search parameters

Type your parameters

MULTI-FIELD SEARCH : Facility

Power User - 1 Field | Power User - 2 Fields | **Multi-Field Search** | EZ Search

Find Facilities SRCH.1.3

Facility Name = JOHN
Service Address Num Alpha = 63
Service Address Street Name = ELLIS
Facility Account Number =
Service Address City = SAN

Must Match All May Match Any Clear Values

MULTI-FIELD SEARCH New Selection x Current Selection Filter Facilities w/out Backflow

Multi-Fiel... Create New Append To Search Within Exclude

Navigation: Left Arrow, Right Arrow, New, ALL, X, Magnifying Glass

Notes:

All or Any?

You can modify the search to look for all parameters or any records that match any one of the criteria.

The Default Option is All

Click the magnifying glass to search

MULTI-FIELD SEARCH : Facility

Power User - 1 Field | Power User - 2 Fields | Multi-Field Search | EZ Search

Find Facilities SRCH.1.3

Facility Name = JOHN
Service Address Num Alpha = 63
Service Address Street Name = ELLIS
Facility Account Number =
Service Address City = SAN

Must Match All May Match Any Clear Values

MULTI-FIELD SEARCH New Selection x Current Selection Filter Facilities w/out Backflow

Multi-Fiel... Create New Append To Search Within Exclude

Navigation: [Left Arrow] [Right Arrow] [New] [ALL] [X] [Magnifying Glass]

Notes:



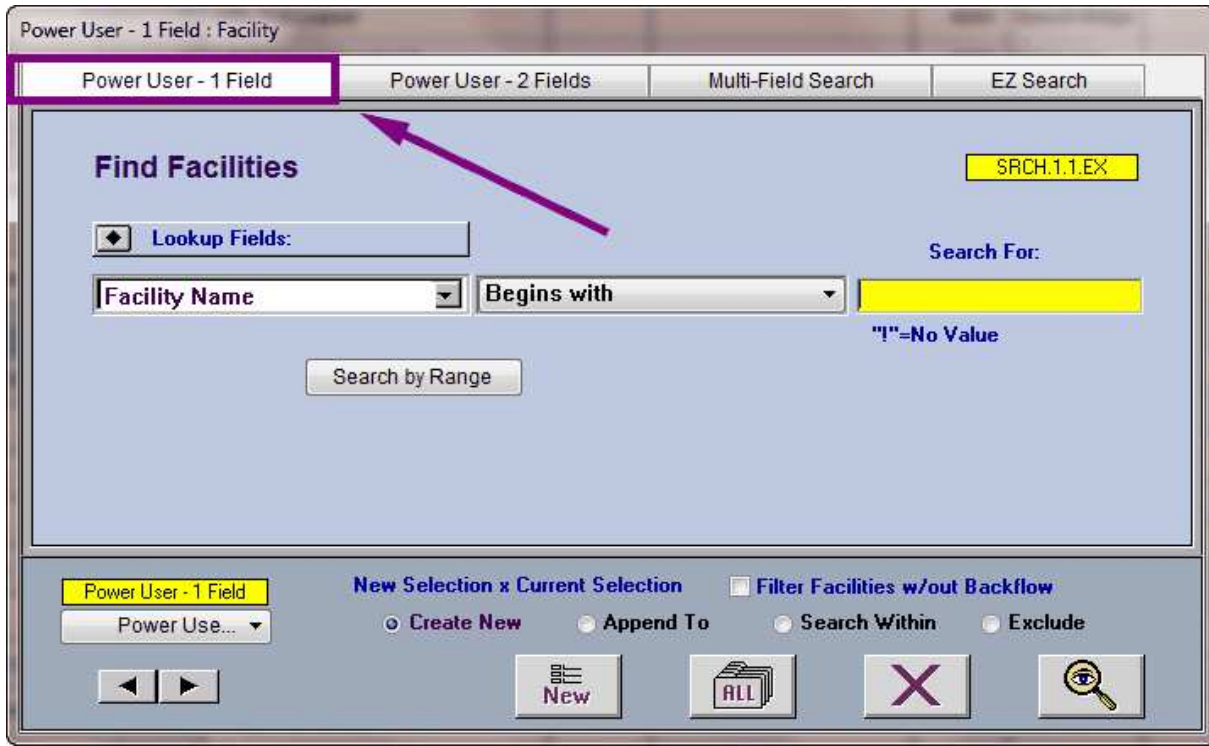
How to Use XC2's Power User - 1 Field Search

KB Asset ID: 2609

Page outlines how to use XC2's Power User 1 Search Tab

Power User 1

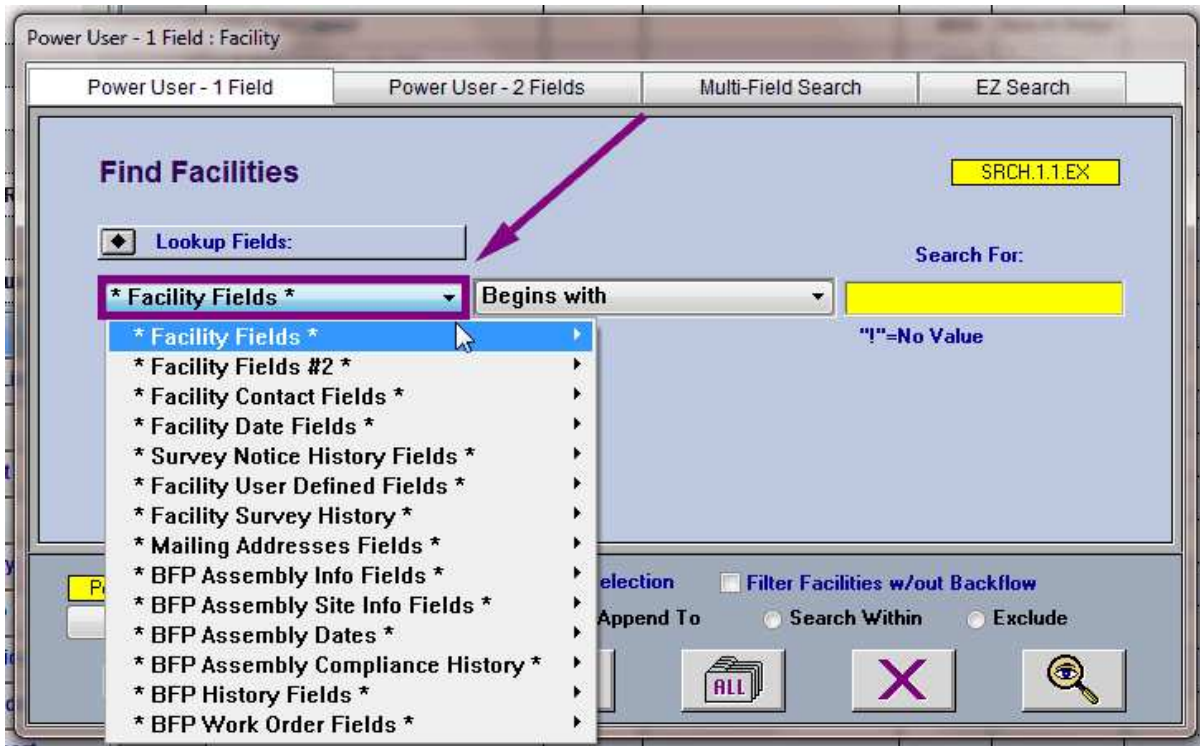
Unlike EZ search and Multi-Field search, Power User 1 search offers many different Search parameters you may choose from.



Notes:

Select Category

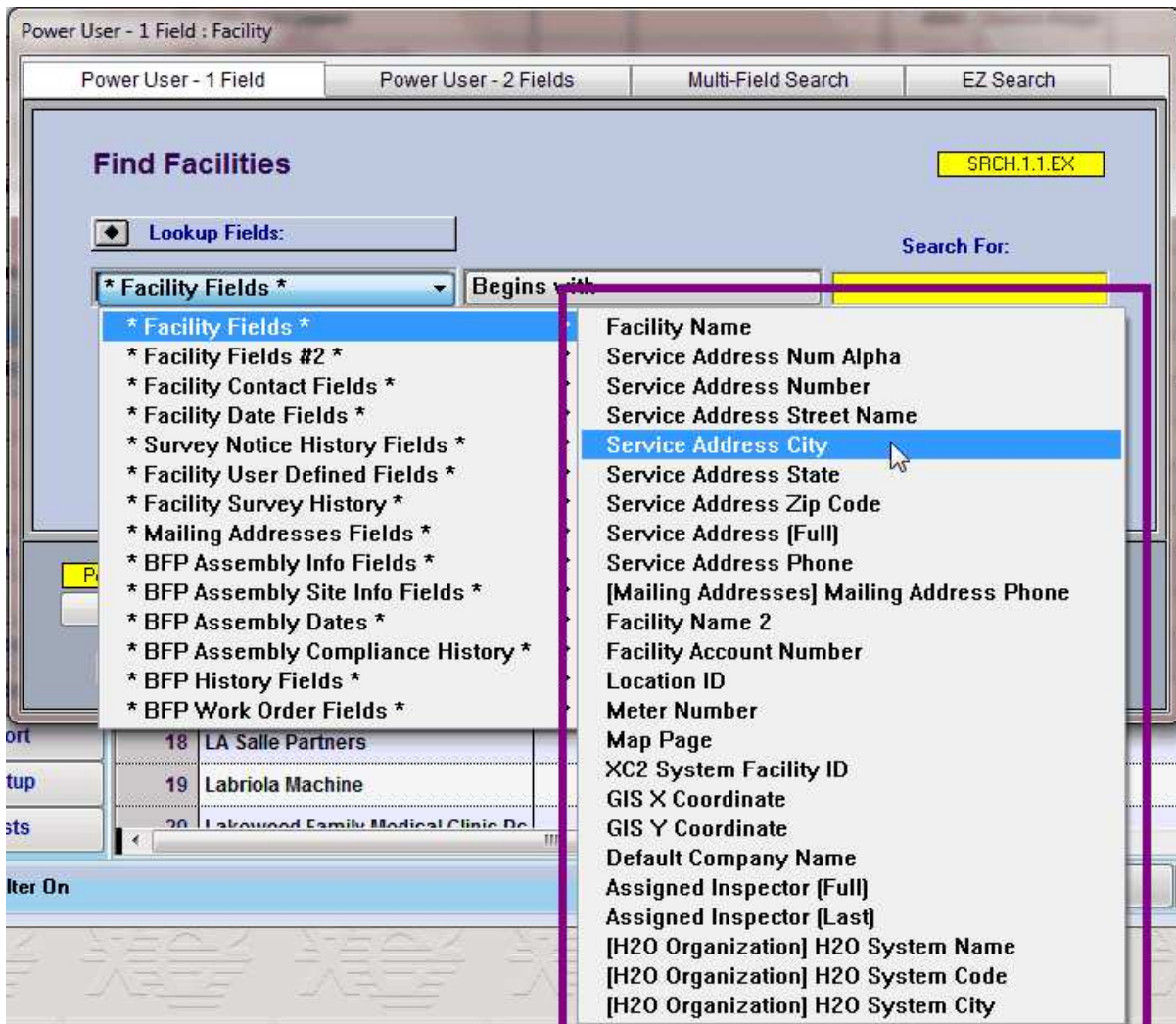
First select a category, click the pull-down menu to display the available categories.



Notes:

Choose parameter

Next choose the parameter you would like to search by.

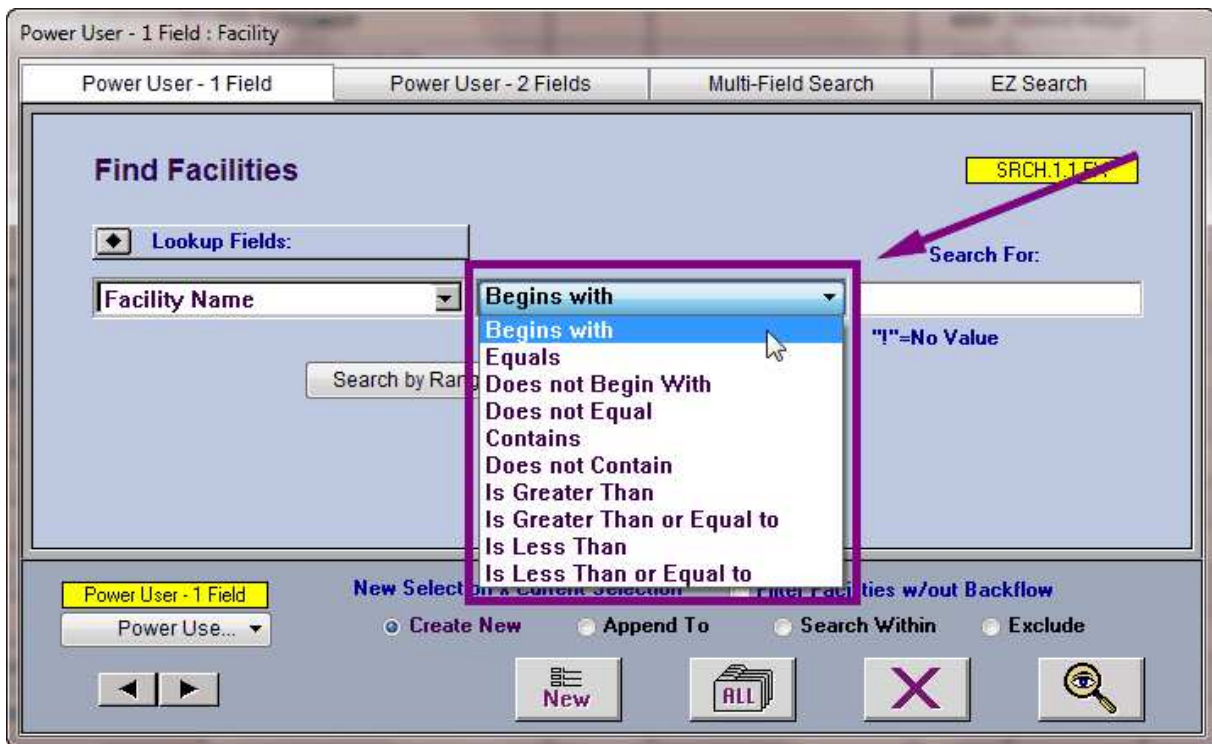


Notes:

Choose How XC2 will search

Select how XC2 will Search. The options are

- Begins With
- Equals
- Does not begin with
- Does not equal
- Contains
- Does not contain
- Is greater than
- Is greater than or equal to
- Is less than
- Is less than or equal to

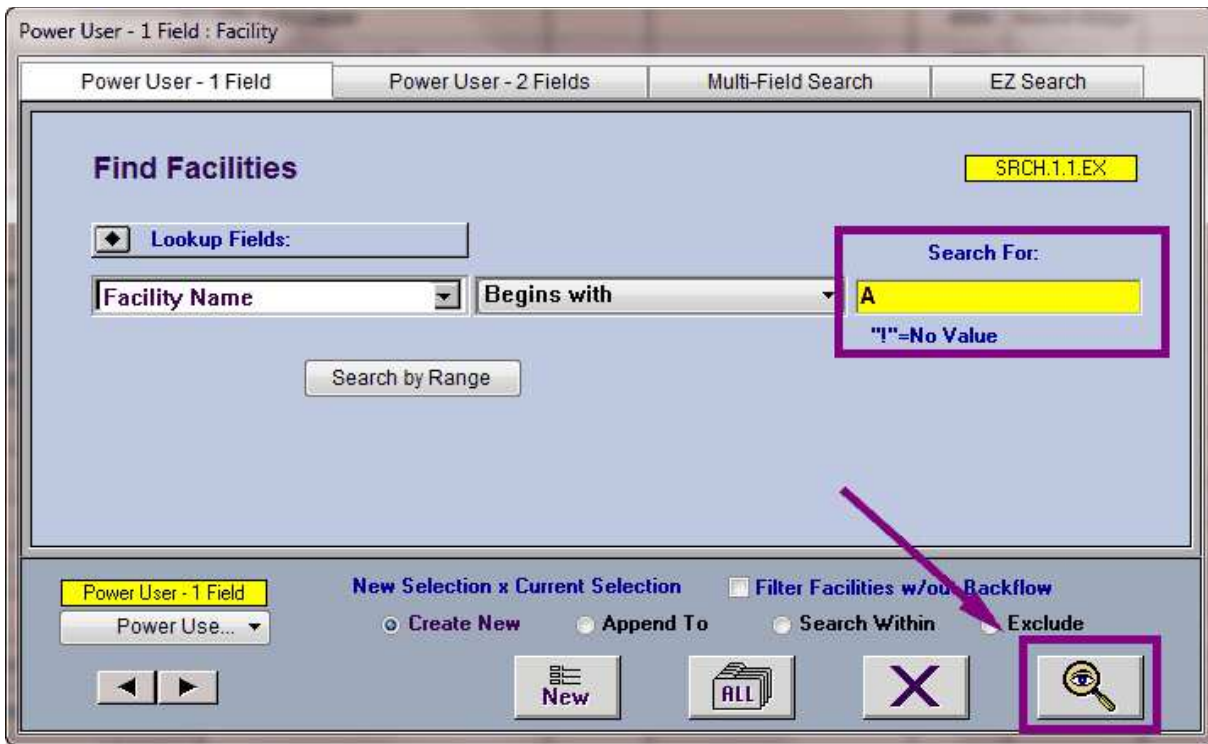


Notes:

Search For

Type what you would like to search for

Click the Magnifying Glass on the lower right corner



Notes:

Search Results

Records that match you search parameters will appear in XC2's List View Window

XC2 Software - BFP : City of Snoqualamish, WA: * Facility: 6 of 76 Records : Multi-Line

User Options: Add, Delete, Find, Sort, Show All, Export, Saved Search, Report

Quick Lookups: Run Selected Lookup, Automatic Reminders, Overdue Notices, Overdue Tests, Failed Assemblies, Unprinted Test Report Results, Tests Due Lookup, Tester Certifications Due

Facility List (selected)

#	Facility Name	Rate Cod	User Defined Alpha 02	Addr (#)	Street	Site Qty	Sched Cod	Next
1	A & B Forest Fresh CO			4415	Ferguson	1	08-Aug	
2	A Flag House			1583	Kim	1	09-Sep	
3	A-Quest Electronics			5289	Preston Mill	1	04-Apr	
4	Academy T V Service			7704	Quarter	1	11-Nov	
5	Academy Veterinary Hospital			8350	Lighthouse	2	08-Aug	
6	Advantage Brokers			5120	Webb	1	12-Dec	

Selection Opt. Filter On Filter Facilities w/out Backflow

Buttons: Send Notice, Enter Survey, Enter Test, Exit XC2

Notes:



XC2 Software Knowledge Base



How to Search by Date Range

KB Asset ID: 16

Searching by a Date Range enables users to find dates that occur within a specific period of time. This page describes what types of dates you can search for and how to search for them.

Records With Dates

Many dates can be entered in XC2: facilities have survey dates, assemblies have test due dates, tester records have certification dates and test kits have calibration dates.

There are obviously more dates than mentioned above available in XC2, but the point is you may need to isolate specific records that are tied together by a specific date range.

Below outlines the process of how you can find specific records based upon a date range.

On The Main Screen

Choose a type of record you would like to search for by selecting the corresponding list view.

Here I am selecting the BFP Assembly List.

Click the Find button on the top of the screen.

XC2 Software - BFP : City of Snoqualamish, WA: * BFP Assembly: 92 of 94 Records : Multi-Line

User Options [Add] [Delete] [Find] [Sort] [Show All] [Export] [Saved Search] [Report]

Quick Lookups: BFP Assembly 92 of 94 Records Find: Facility Name [Go!]

#	Last Letter Date	Active	Facility Name	Last Stat	Addr (#)	Street	Next Test
18		✓	SENIORS IN COMMUNITY LIVING	PASS	9095	GREYSON	05/31/2015
19	12/01/2010	✓	MANN ROBERT ORIENTAL	PASS	1637	KETTERINGTON	01/01/2015
20	01/01/2011	✓	RAINBOW REBUILDERS	PASS	123	WEST	01/31/2012
21	01/17/2011	✓	MALECALL II	PASS	9044	KELSEY	01/01/2015
22	01/17/2011	✓	RAINS-FLO PACKINGS	PASS	5102	CLARK-SHAW	12/31/2014
23	01/17/2011	✓	LINGERIE ETC	PASS	1760	CUYUGA	12/31/2014
24	01/17/2011	✓	ADVANTAGE BROKERS	PASS	5120	WEBB	12/31/2014
25	02/01/2011	✓	LA SALLE PARTNERS	PASS	5622	STERLING GLEN	01/01/2015
26	02/01/2011	✓	WORLD COMPUTER CORPORATI	PASS	7816	YANKEE	02/28/2012
27	02/01/2011	✓	MIDWEST SALES CO	PASS	4557	FRANK	01/01/2015
28	03/01/2011	✓	PACIFIC JEWELRY & LOAN CO	PASS	2566	MAIN	03/31/2012
29	03/01/2011	✓	HOSPITALITY FLOWERS & GIFTS	PASS	6725	SHERIDAN	01/01/2015
30	03/25/2011	✓	LAKEWOOD FAMILY MEDICAL CL	PASS	7846	CHAMPIONS	01/01/2015
31	03/25/2011	✓	TAYLORS LIQUORS	PASS	445	PERKINS	08/01/2012
32	03/25/2011	✓	MERCER WILLIAM M INCORPOR	PASS	5707	CHATHAM	01/01/2015

Left Sidebar: Facility List, BFP Assembly List, Tester List, Company List, BFP History, Survey History, Notice Setup, Send Annual Notices, Automatic Reminders, Compliance Report, Administrator Setup, Lookup/Setup Lists

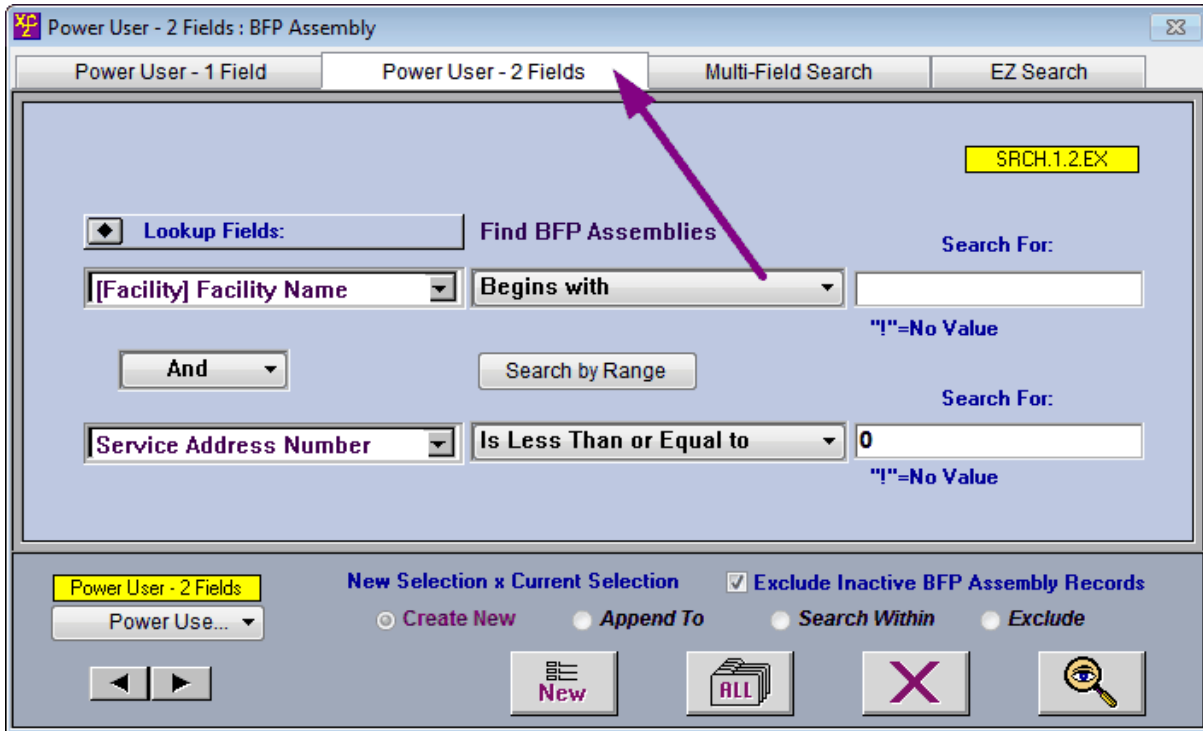
Bottom Buttons: Set Selection, Recall Selection, Exclude Inactive BFP Assembly Records, Send Notice, Enter Survey, Enter Test*, Exit XC2

Notes:

Power User - 2

Click **Power User - 2 Fields** found on the search window.

Power User - 2 Fields

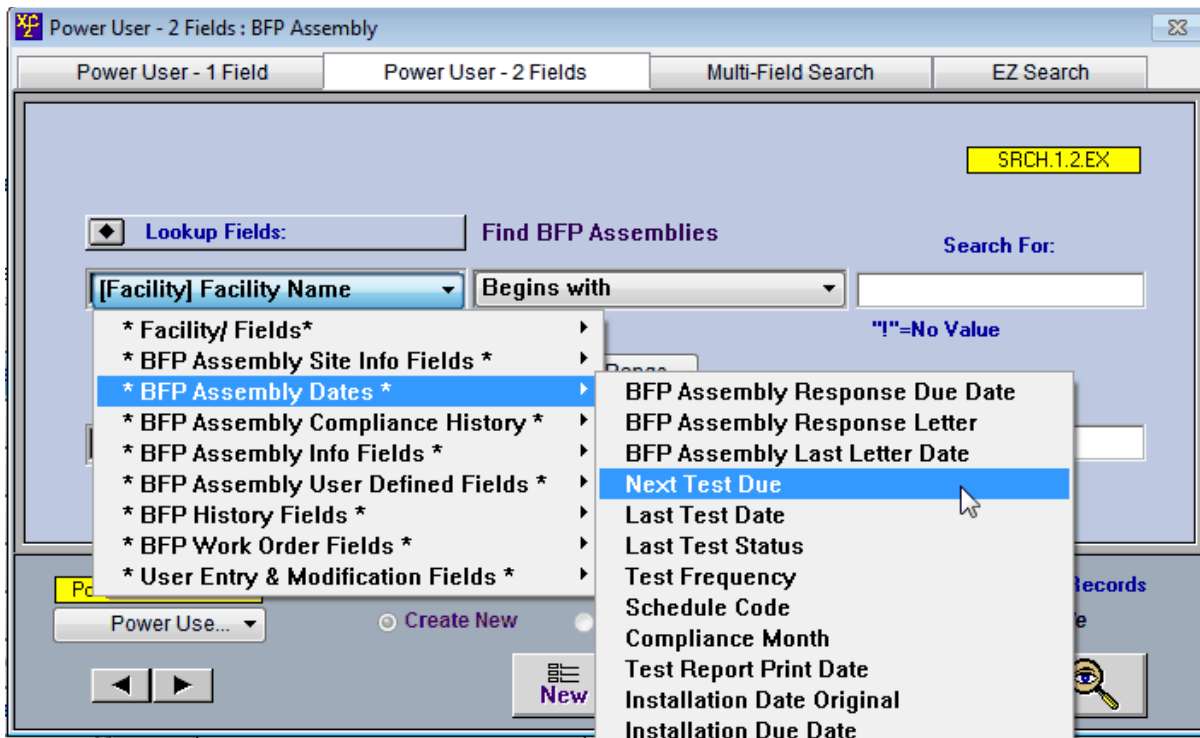


Notes:

Choose a Date Parameter

Choose a specific type of date you would like to search for.

In this example we are choosing **Next Test Due Date**



Notes:

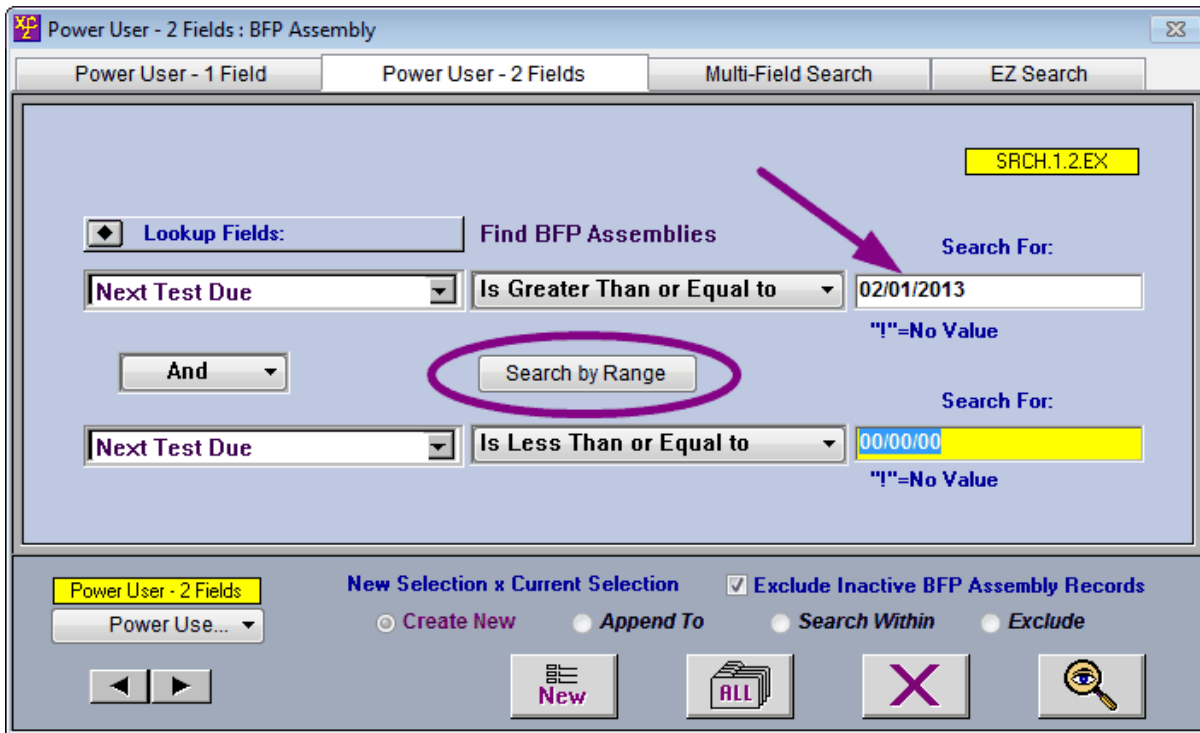
Choosing the Date Range

Type the start date in the first field

Then

Click Search By Range

Search By Range Button

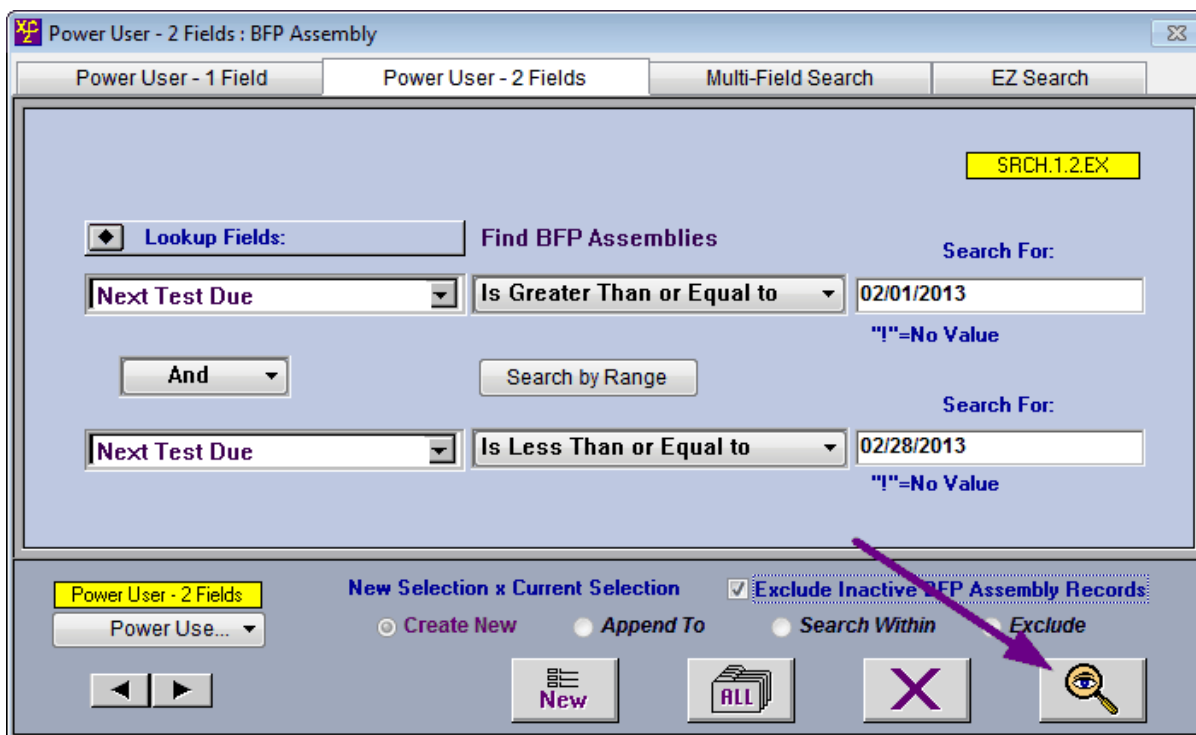


Notes:

Type in the end date, then search with eyeball.

Note:

In this example, we are searching for all BFP Assemblies with Next Test Due Dates between February 1st 2013 through February 28th 2013.



Notes:

Search Results

After clicking Search, all results will appear on the Main Screen.

Below are all devices that are due to be tested in February of that year.

Febuary's Next Test Due

The screenshot shows the XC2 Software interface with a table of BFP Assembly records. The table has columns for #, Facility Name, Last Status, Addr (#), Street, Next Test, Last Test, and Serial. The 'Next Test' column for the first six records is circled in purple.

#	Facility Name	Last Status	Addr (#)	Street	Next Test	Last Test	Serial
1	ACADEMY VETERINARY HOSPITAL	PASS	8350	LIGHTHOUSE	02/15/2013	08/20/2012	18205
2	BETHESDA AT ST ANTHONY HOSPITAL	PASS	1802	WOODCREEK	02/12/2013	07/10/2011	LL426
3	BOULDER MTN OVERCHARGE CLAIM AU	PASS	7930	MAYS	02/20/2013	04/16/2012	73937
4	CHILDREN'S HOSPITAL	PASS	1552	NAPLES NATIONAL	02/25/2013	03/16/2011	EZ305
5	CHILDREN'S HOSPITAL	PASS	1552	NAPLES NATIONAL	02/04/2013	04/16/2011	ME311
6	CHILDREN'S HOSPITAL	PASS	1552	NAPLES NATIONAL	02/09/2013	01/10/2010	12625

Notes:



How to Create a Saved Search in XC2 Backflow

KB Asset ID: 3216

This page describes how to create a query (Saved Search) that can be performed over again without re-configuring.

What Is a Saved Search

A Saved Search is a saved set of information that can be used to create and re-create groups of records within a list view.

Saved Searches are useful when you need to find a specific set of information multiple times.

If you find yourself constantly looking for specific records, save yourself some time by creating a Saved Search.

The screenshot shows the XC2 Software interface for BFP Assembly records. The main window displays a table with 7 records. The 'Run Selected Search' menu is open, and a red arrow points to the 'ASSY TESTED LAST 30 DAYS' option.

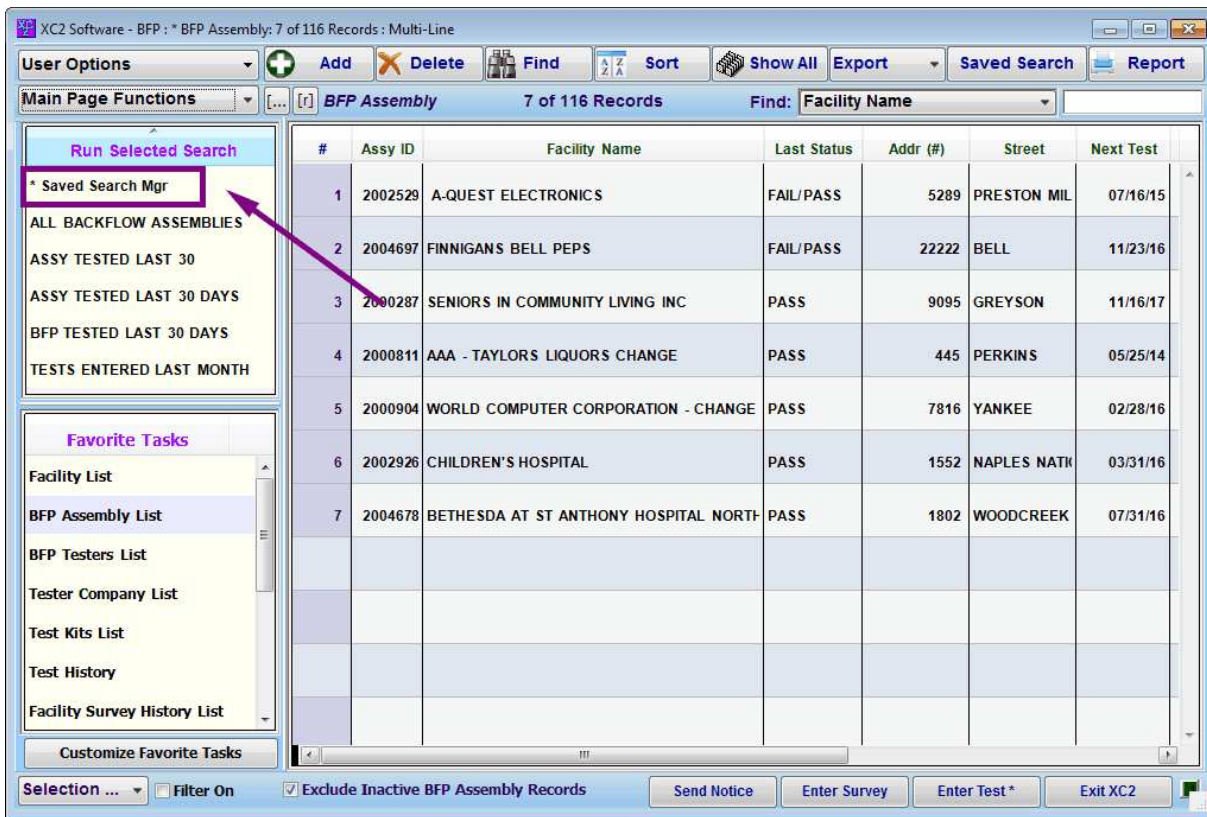
#	Assy ID	Facility Name	Last Status	Addr (#)	Street	Next Test
1	2002529	A-QUEST ELECTRONICS	FAIL/PASS	5289	PRESTON MIL	07/16/15
2	2004697	FINNIGANS BELL PEPS	FAIL/PASS	22222	BELL	11/23/16
3	2000287	SENIORS IN COMMUNITY LIVING INC	PASS	9095	GREYSON	11/16/17
4	2000811	AAA - TAYLORS LIQUORS CHANGE	PASS	445	PERKINS	05/25/14
5	2000904	WORLD COMPUTER CORPORATION - CHANGE	PASS	7816	YANKEE	02/28/16
6	2002926	CHILDREN'S HOSPITAL	PASS	1552	NAPLES NATI	03/31/16
7	2004678	BETHESDA AT ST ANTHONY HOSPITAL NORTH	PASS	1802	WOODCREEK	07/31/16

Notes:

Saved Search Manager

In the Saved Search screen

Click the Saved Search Manager

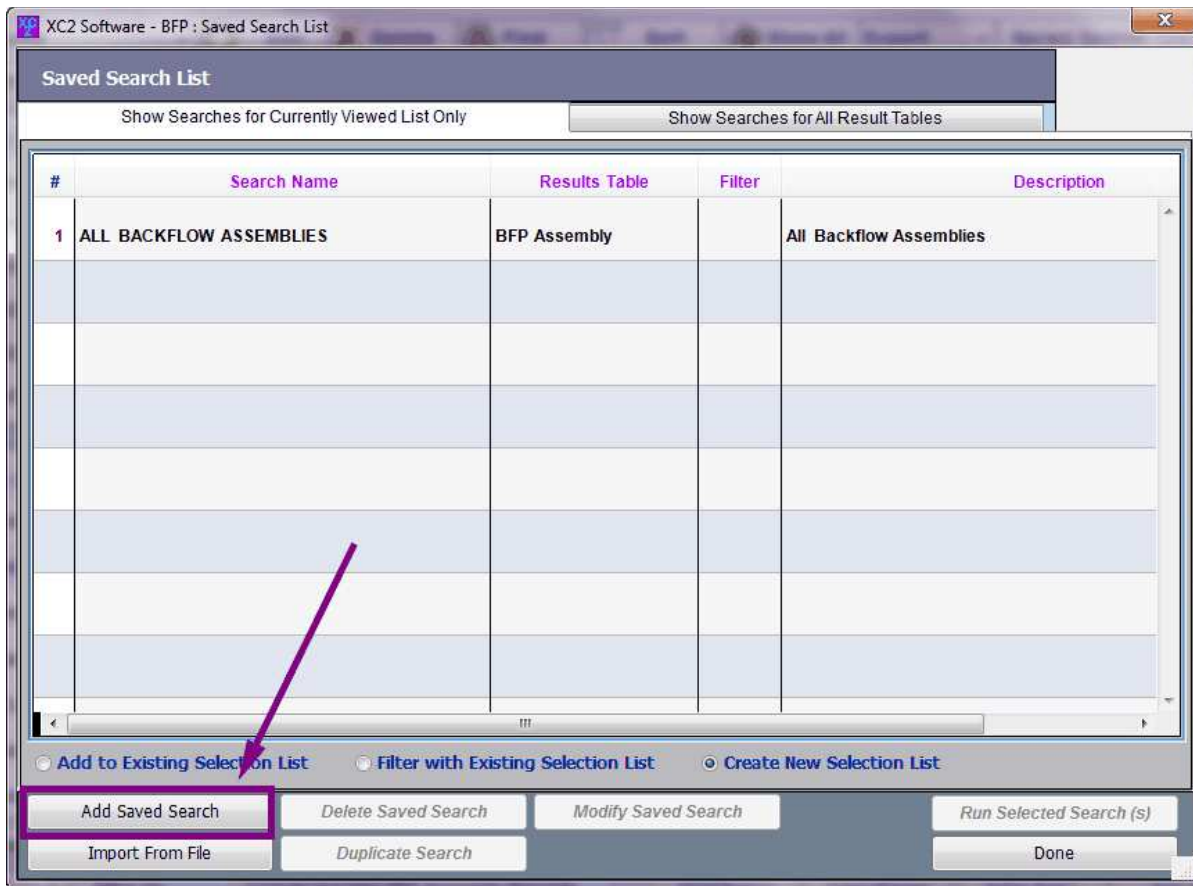


Notes:

Add Saved Search

To create a new Saved Search, click Add Saved Search.

Note: You can edit saved searches by double clicking on existing saved searches.



Notes:

Saved Search Name

Create a name for your Saved Search.

Make a choice from the Results Table: what type of records are you looking for? Example, Assembly records can be found in the BFP Assembly table.

Description: by default, the description of the search will be the name of your search. You can change the description by typing into the description box.

System ID: 10000017

Saved Search Name: OVERDUE BFP ASSEMBLIES

Results Table: BFP Assembly

Last Date: [] Records: []

Description: OVERDUE BFP ASSEMBLIES

Display in List View: []

Created: Designer : 2016-03-10T11:25:57 Modified: []

!	Search Field	Operator	Value	Date Mod

Add Search Item Delete Search Item Select a Field to Search Duplicate this Saved Search

Exclude Inactive Records Set as Filter

Must Match All Above Criteria May Match Any of Above Criteria

Global - All Users May Use This Search My Search Only

Save To File Run This Search Now Cancel Save

Notes:

Add Saved Search Item

You can begin to create the saved search by clicking Add Saved Search.

Saved Search Setup System ID: 10000017

Saved Search Name: OVERDUE BFP ASSEMBLIES

Results Table: BFP Assembly Last Date: Records:

Description: OVERDUE BFP ASSEMBLIES

Display in List View:

Created: Designer: 2016-03-10T11:25:57 Modified:

!	Search Field	Operator	Value	Date Mod

Add Search Item Delete Search Item Select a Field to Search Duplicate this Saved Search

Exclude Inactive Records Set as Filter

Must Match All Above Criteria May Match Any of Above Criteria

Global - All Users May Use This Search My Search Only

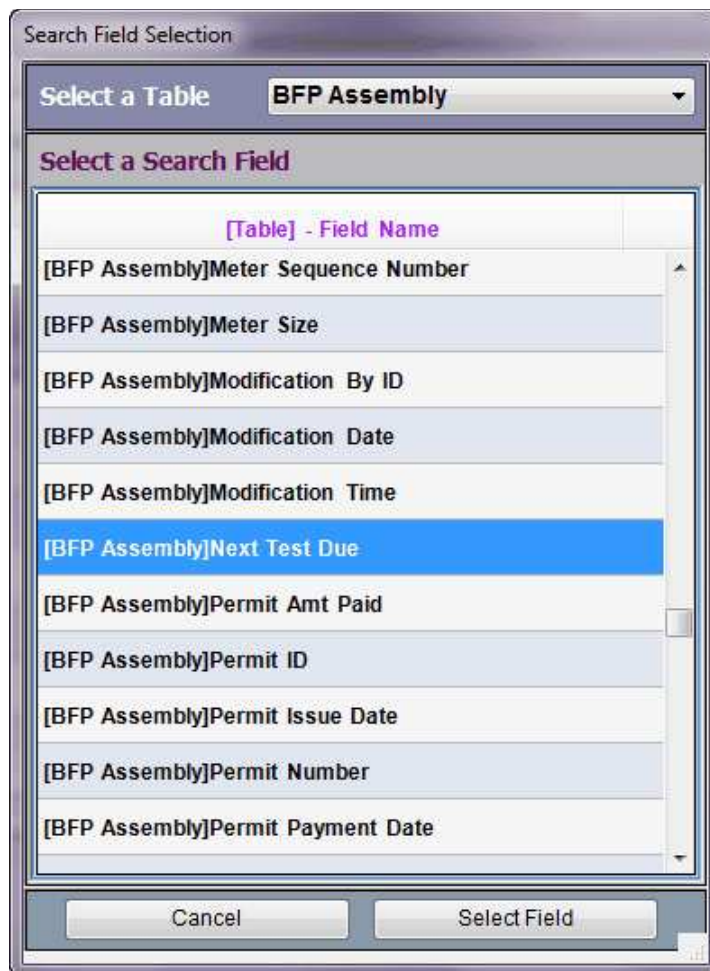
Save To File Run This Search Now Cancel Save

Notes:

Choose First Parameter

Choose the first field that you would like to include in your saved search.

You can choose a field by double clicking on the name of the field.



Notes:

Type in a value or choose from the list

Next choose one of the items in the "Operator" dropdown.

Next you need to do one of two things:

- 1) Hand-type the value to search for OR
- 2) Choose a date from the list provided

Note: If the field in XC2 is a checkbox, type True in the value box for when the box is checked and False if it is not checked.

System ID: 10000017

Saved Search Name: OVERDUE BFP ASSEMBLIES

Results Table: BFP Assembly

Description: OVERDUE BFP ASSEMBLIES

Display in List View: [Dropdown]

Created: Designer : 2016-03-10T11:25:57

!	Search Field	Operator	Value	Date Mod
⊗	[BFP Assembly]Next Test Due	Is Less Than	*Current_Date*	

Buttons: Add Search Item, Delete Search Item, Select a Field to Search, Duplicate this Saved Search, Save To File, Run This Search Now, Cancel, Save

Options: Exclude Inactive Records, Set as Filter, Must Match All Above Criteria, May Match Any of Above Criteria, Global - All Users May Use This Search, My Search Only

Notes:

Multiple Search Parameters

If you have multiple search parameters, you can choose to have the results match all parameters or any of the listed parameters.

Saved Search Setup System ID: 10000017

Saved Search Name: OVERDUE BFP ASSEMBLIES
 Results Table: BFP Assembly Last Date: Records:
 Description: OVERDUE BFP ASSEMBLIES
 Display in List View:
 Created: Designer: 2016-03-10T11:25:57 Modified:

!	Search Field	Operator	Value	Date Mod
⊗	[BFP Assembly]Next Test Due	Is Less Than	*Current_Date*	

Exclude Inactive Records
 Set as Filter

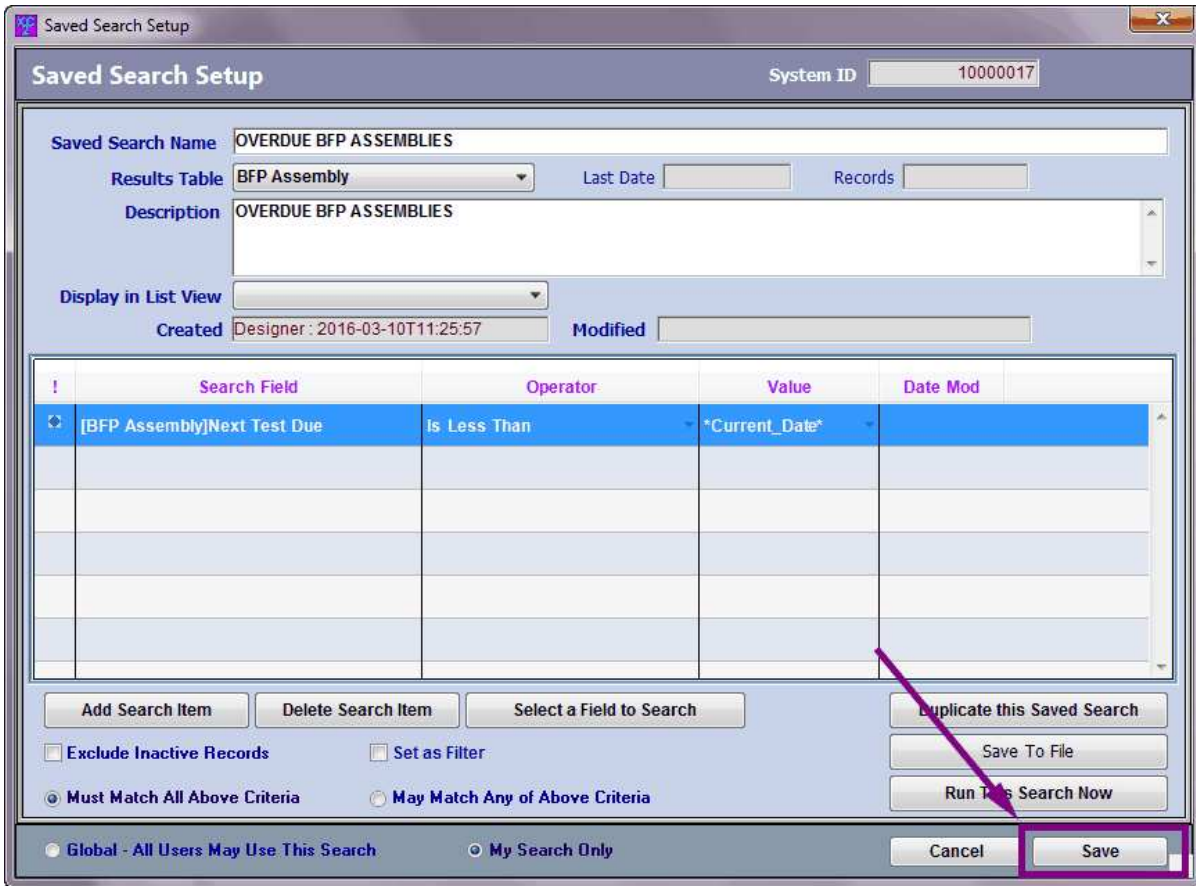
Must Match All Above Criteria
 May Match Any of Above Criteria

Global - All Users May Use This Search
 My Search Only

Notes:

Save Your Search

When you are finished creating your saved search, save the search by clicking Save.



Notes:

Saved Search Buttons

All Saved Searches will be available on the main page.

The screenshot shows the XC2 Software interface with a table of BFP Assembly records. The table has columns for #, Assy ID, Facility Name, Last Status, Addr (#), Street, and Next Test. A sidebar on the left contains a 'Run Selected Search' menu with options like 'ALL BACKFLOW ASSEMBLIES', 'ASSY TESTED LAST 30', etc. A purple arrow points from the 'Run Selected Search' menu to the table.

#	Assy ID	Facility Name	Last Status	Addr (#)	Street	Next Test
1	2002529	A-QUEST ELECTRONICS	FAIL/PASS	5289	PRESTON MIL	07/16/1
2	2004697	FINNIGANS BELL PEPS	FAIL/PASS	22222	BELL	11/23/1
3	2000287	SENIORS IN COMMUNITY LIVING INC	PASS	9095	GREYSON	11/16/1
4	2000811	AAA - TAYLORS LIQUORS CHANGE	PASS	445	PERKINS	05/25/1
5	2000904	WORLD COMPUTER CORPORATION - CHANGE	PASS	7816	YANKEE	02/28/1
6	2002926	CHILDREN'S HOSPITAL	PASS	1552	NAPLES NATH	03/31/1
7	2004678	BETHESDA AT ST ANTHONY HOSPITAL NORTH	PASS	1802	WOODCREEK	07/31/1

Notes:



Advanced Search Settings

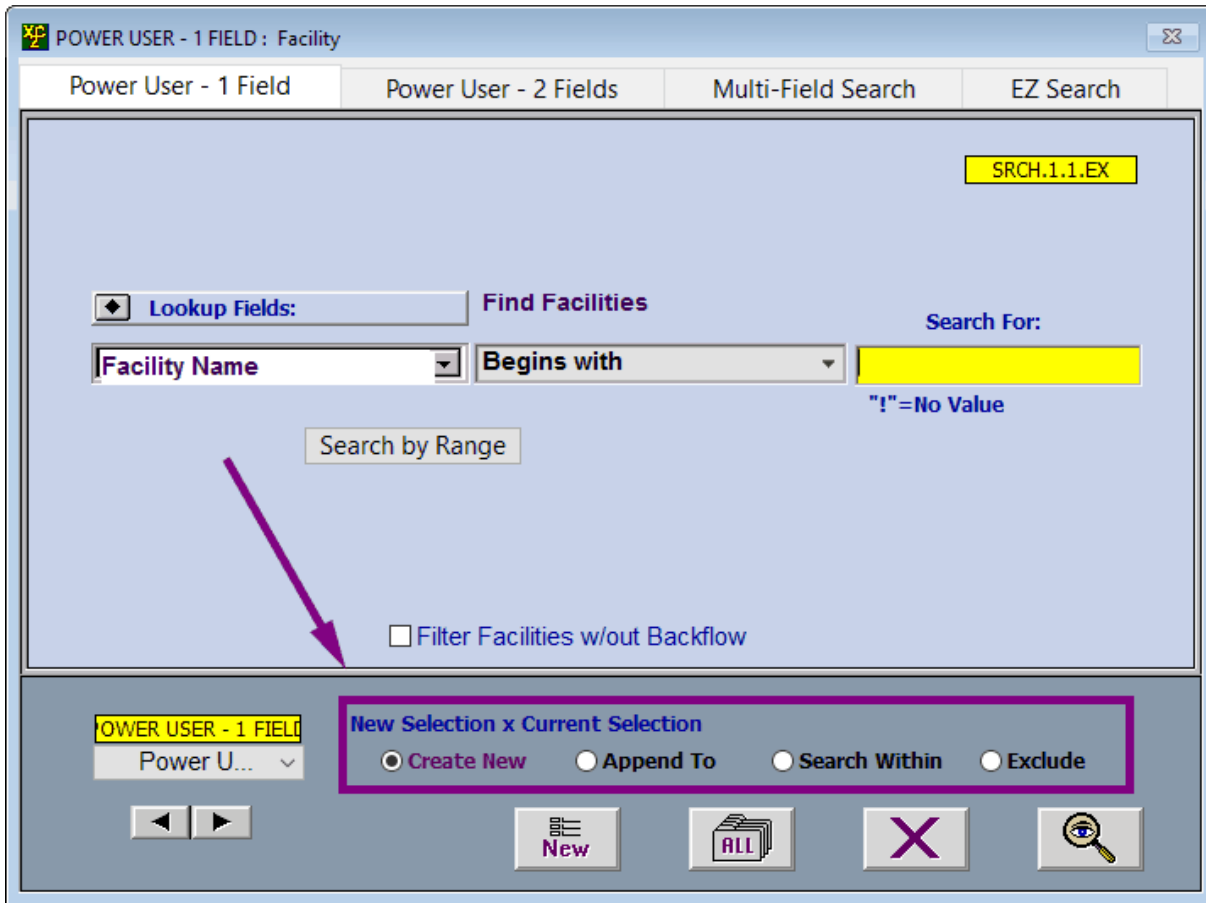
KB Asset ID: 3628

You can Customize each search option from within the search screen. This page describes how to use New, Append, Within and Exclude

Advanced Options

The below options can help create a custom list of records

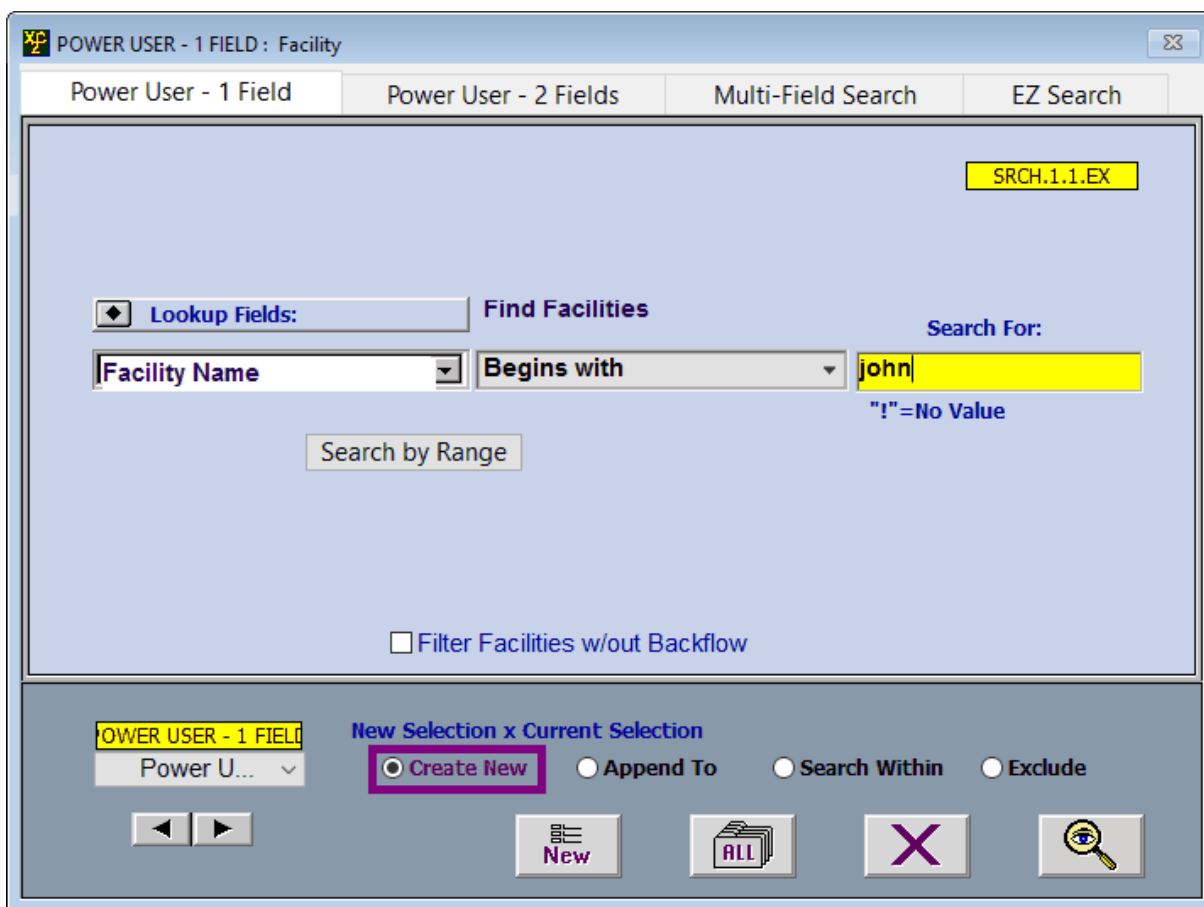
other than create new, these other search options are for modifying an existing list



Notes:

Create New

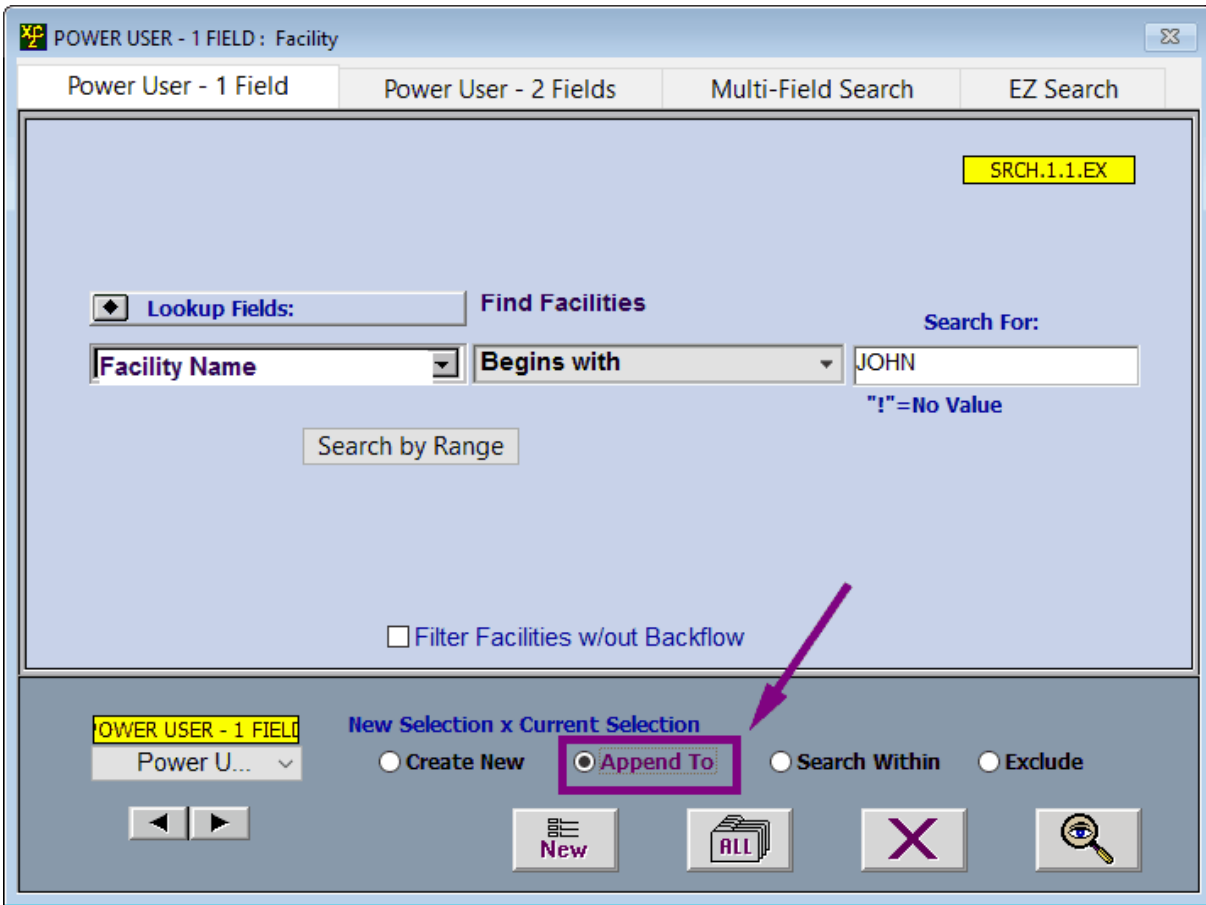
This will create a new list of records. This is the standard search option



Notes:

Append To

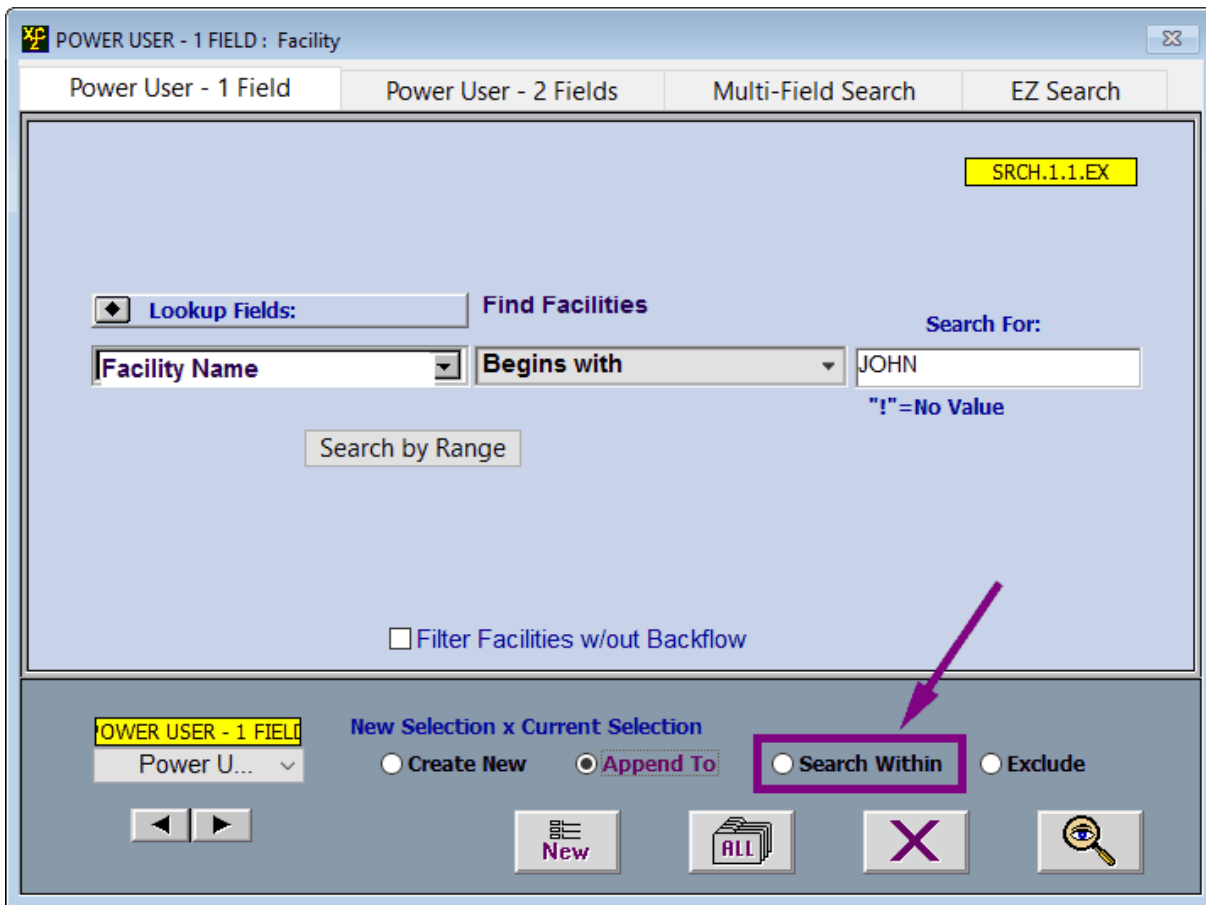
This option will add records to an existing list.



Notes:

Search Within

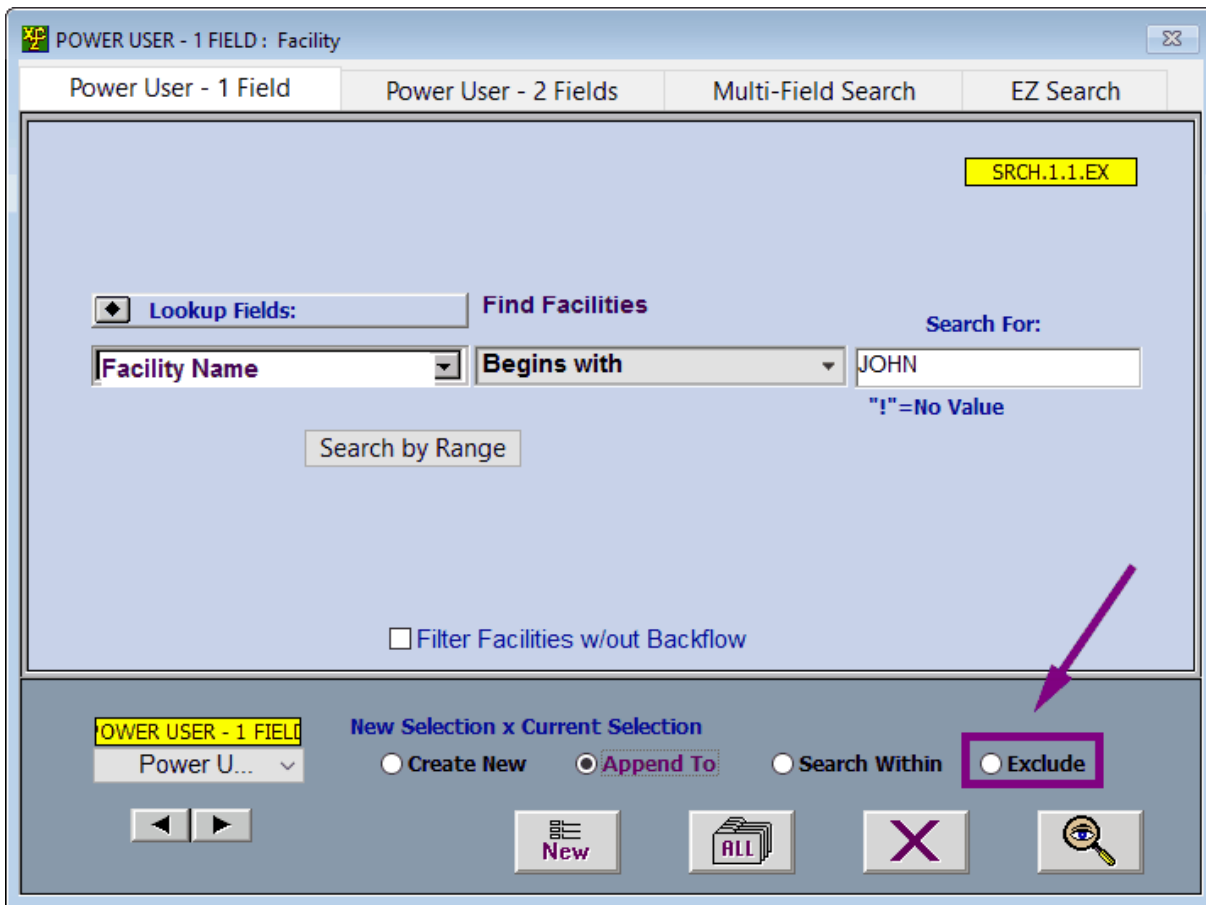
This option will only search through your current list of records



Notes:

Exclude

This will remove a group of records from your existing list view



Notes:



XC2 User Manual

Facilities

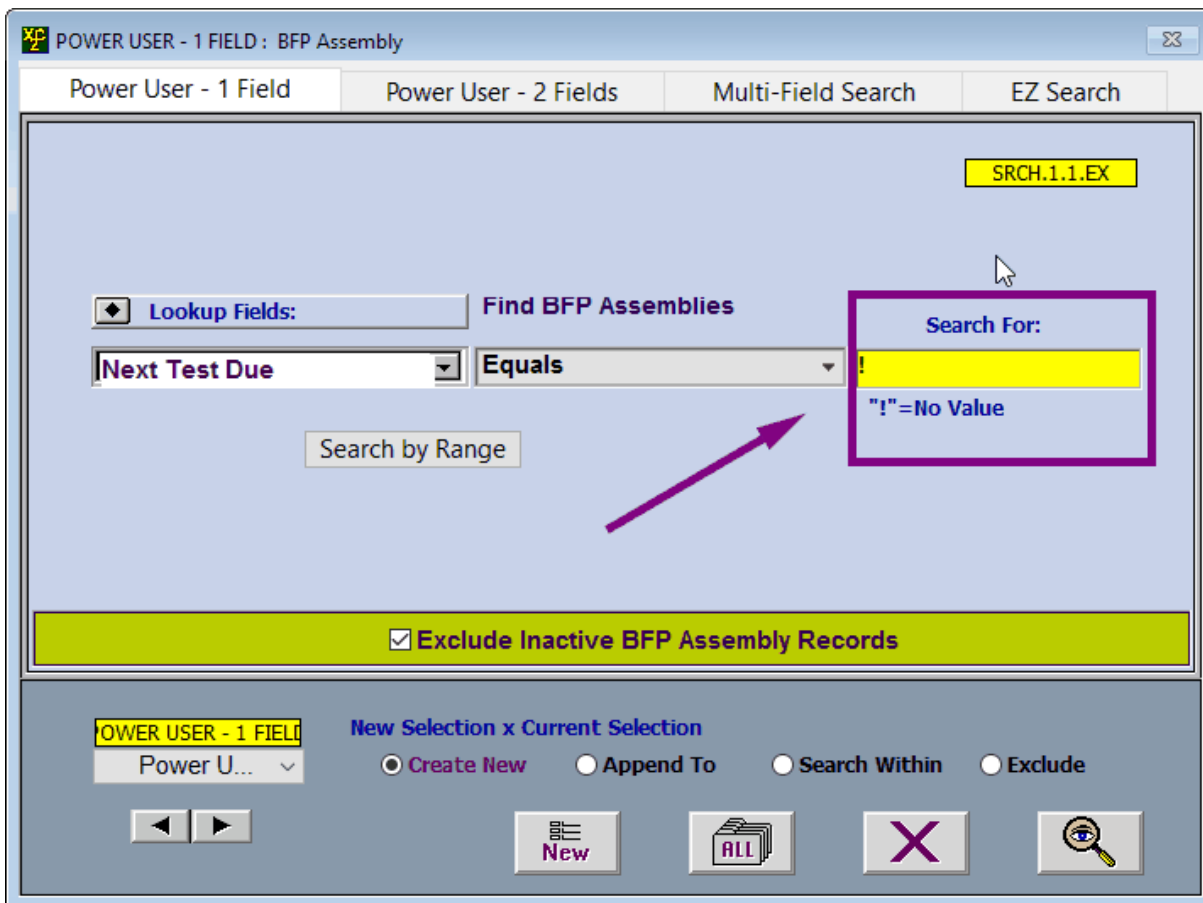
- **What Is a Facility Record**
- **Facility Screen Overview**
- **How to Create a New Facility Record**
- **How to Edit Existing Facility Record**
- **Facility Address Options**
- **Adding Pictures to a Facility Record**

No Value Search

You can also search for records if there is no value in the search parameters.

Use the Symbol "!" to find records that do not have a value in place

Here I am searching for backflow assemblies that do not have a next test due date



Notes:



XC2 Software Knowledge Base



What is a Facility Record?

KB Asset ID: 3515

This page describes the concept of a Facility Record

What is a Facility Record?

A facility record is an account of a specific building or parcel.

In terms of backflow prevention It is essentially the Space that is surveyed and where backflow assemblies are installed and tested.

When creating Assembly records, you will be associating the backflow assembly record with a Facility Record.

Here is a facility record with multiple backflow assemblies associated with it

The screenshot shows the 'Facility Information' tab in the XC2 software. The facility name is 'STEELE ELEMENTARY SCHOOL' and the facility ID is 692. The address is 6916 W CROOKED ELM CT, SNOQUALAMISH, WA 98215. The contact name is JERAMY and the last name is KELLY. The phone number is (696) 233-6501. The facility status is 'ACTIVE' and the color is 5902412. The assigned inspector is blank, and the auth. tester company is blank. The SIC code is blank and the rate code is blank. The next survey date is 03/09/2013 with a frequency of 60 months. The schedule code is 03-Mar. The map page is blank. The BFP Assembly List shows two assemblies:

#	Hazard Type	Serial Num	Type	Size	Mfr	Next Tes	Last Tes	Active	Coun	Status	Service Address	Equip Location
1		2002039	RP	3"	FEBCO	04/20/16	05/12/11	✓	Y	Installed	6916 W CROOKEI	
2		JA29516	RP	3/4"	WATTS	04/20/16	04/08/11	✓	Y	Installed	6916 W CROOKEI	

Notes:



XC2 Software Knowledge Base



Facility Screen Overview

KB Asset ID: 3516

This page goes over all of the different parts of XC2's Facility Screen

Service Information

The Facility Service Information is located within it own Tab in the Top Left Corner.

Service address is the physical location of the facility record

This is the default Facility Information that appears when you open a Facility Record

Service information includes

- Facility Name
- Facility Service Address
- Facility Service City, State and Zip
- Contact information

XC2 Software - BFP : Facility : STEELE ELEMENTARY SCHOOL : 6916 W CROOKED ELM CT : 21 of 92 Selected : WEB SERVER ON : 80 : WEB BFP Test

Facility Info Custom Fields Comments Expand List

Facility Information Mailing Addresses Owner Addresses Property Manager

Facility Address Info **XC2 Facility ID No: 692**

Facility Name: STEELE ELEMENTARY SCHOOL

Facility Name 2: []

Service Addr.: 6916 W CROOKED ELM CT

Addr. 2: [] Addr. Unit: []

City ST Zip: SNOQUALAMISH WA Zip: 98215

Contact Name: JERAMY Last: KELLY

Position: [] Cell: (696) 236-1802

Phone: (696) 233-6501 Ext: [] Emerg Phone: []

E-Mail Address: []

Email Notices

XC2 Facility ID No: 692
 H2O_System: []
 Location ID: 692 [Edit Number](#)
 Customer Code: TMYP-8676 [For Customer](#)
 Tester Code: MNMP-6114 [For Tester](#)
 Group Code: [] [Edit Code](#)
 Acct Number: 16989-000 Seq: []
 Parcel Number: 02153
 Last Survey Date: 03/09/2008 Freq. (mos.): 60
 Next Survey Date: 03/09/2013 **FACILITY_06.1**
 Schedule Code: 03-Mar
 Map Page: []

Service Type: [] Assigned Inspector: []
 Facility Type: [] Auth. Tester Company: []
 Facility Status: ACTIVE
 Color: 5902412 SIC Code: [] Rate Code: []

[Address Options](#)
[Update Options](#)
[Meter & GPS Info](#)

#	Hazard Type	Serial Num	Type	Size	Mfr	Next Tes	Last Tes	Active	Count	Status	Service Address	Equip Location
1		2002039	RP	3"	FEBCO	04/20/16	05/12/11	✓	Y	Installed	6916 W CROOKE	
2		1A29516	RP	3/4"	WATTS	04/20/16	04/08/11	✓	Y	Installed	6916 W CROOKE	

[Quick Test Entry](#) [Enter New Test](#) [New BFP Assembly](#) [Send Notice](#) [Delete Item](#) [View BFP Asse...](#) [Expand List](#) Exclude Inactive

Pictures/Site M... MapQuest Qty BFP: 2 Add Facility Search Report/Print [Cancel](#) [Save](#)

Notes:

Mailing Address

Facility Mailing Address

Each Facility can have its own mailing address that is separate from the service information

The Mailing Address is where mail is sent

Much like the Service address, the Facility Screen Contains

- Facility Mailing Name
- Facility Mailing Address
- Facility Mailing City, State Zip.
- Facility Contact Information

By default, Mailing information will be the same as service information until the record is changed.

Notes:

Owner Address and Property Manager

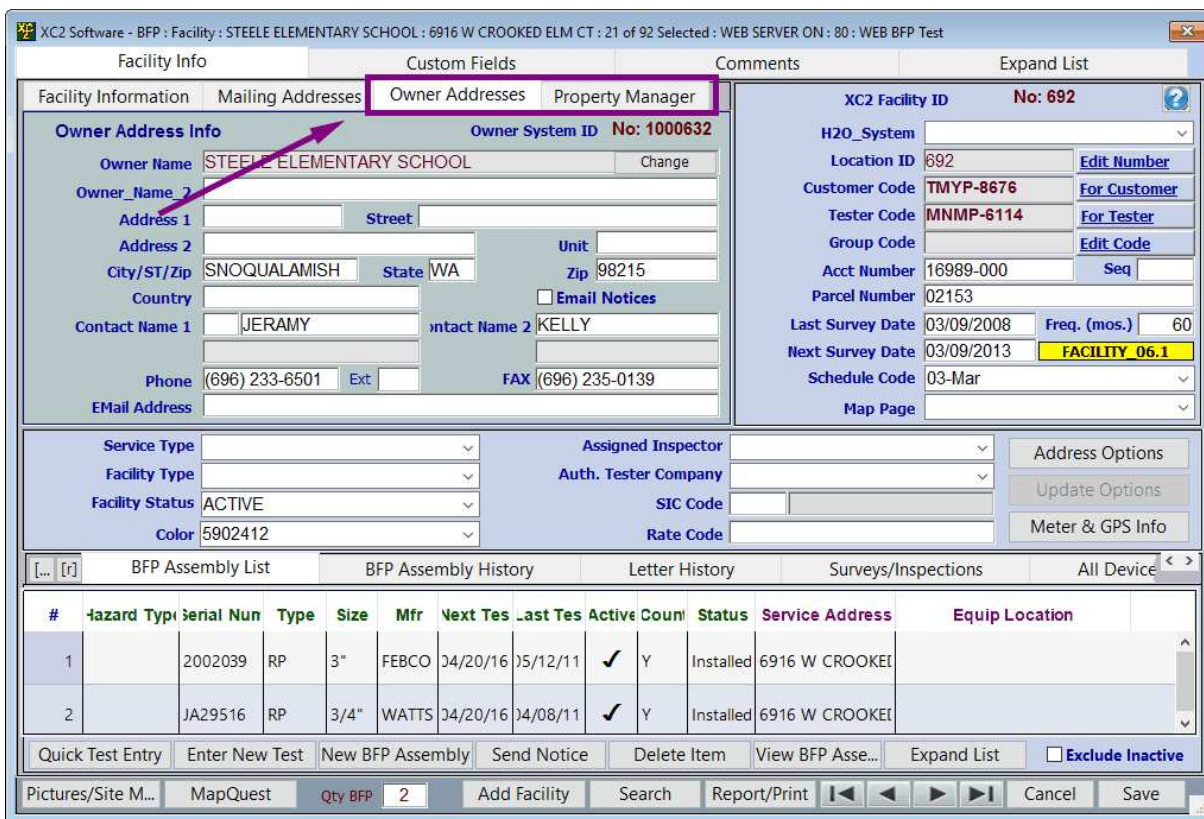
You can have two other types of address information in a Facility Record as well

Owner Address and a Property Manager

The Owner Address is the person who owns the building

The property manager is someone who is hired to run the facility

Both Address Tabs are Separate and can hold individual address information



Notes:

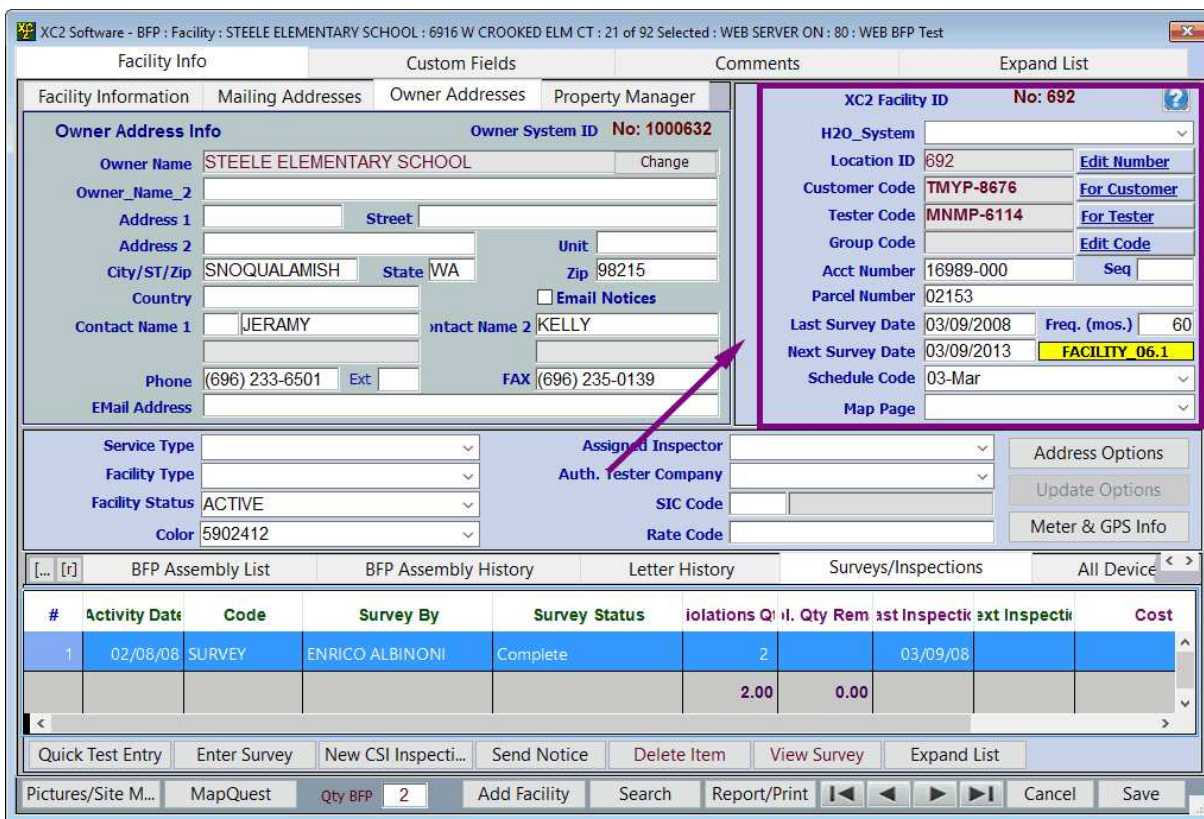
General Facility Information

The top right portion of the facility Screen contains general Facility Information regarding the Business

This information includes

- Survey Date History
- Account Number information
- Location Id's

All of this information is specific to the facility record



Notes:

Facility Assembly List

The default tab at the bottom is the Facility Assembly List

All assembly records that are associated with that facility will be listed.

The screenshot shows the 'XC2 Software' interface for a facility named 'STEELE ELEMENTARY SCHOOL'. The 'BFP Assembly List' tab is selected, displaying a table of assembly records. The table has columns for #, Hazard Type, Serial Num, Type, Size, Mfr, Next Tes, Last Tes, Active, Count, Status, Service Address, and Equip Location. Two records are listed: one for a 3" RP pipe (Serial Num 2002039, Mfr FEBCO) and another for a 3/4" RP pipe (Serial Num JA29516, Mfr WATTS). Both are installed and active.

#	Hazard Type	Serial Num	Type	Size	Mfr	Next Tes	Last Tes	Active	Count	Status	Service Address	Equip Location
1		2002039	RP	3"	FEBCO	04/20/16	05/12/11	✓	Y	Installed	6916 W CROOKE	
2		JA29516	RP	3/4"	WATTS	04/20/16	04/08/11	✓	Y	Installed	6916 W CROOKE	

Notes:

BFP Assembly History

The BFP Assembly History Can be Accessed from the Facility List

The History Tab will display all tests, repair, replacement or installtion record entered for each Assembly

The screenshot shows the 'XC2 Software' interface for a facility named 'STEELE ELEMENTARY SCHOOL'. The 'BFP Assembly History' tab is selected and highlighted with a purple box. A purple arrow points to the 'Serial Num' column in the assembly history table.

Owner Address Info:
 Owner Name: STEELE ELEMENTARY SCHOOL
 City/ST/Zip: SNOQUALAMISH WA 98215
 Contact Name 1: JERAMY, Contact Name 2: KELLY
 Phone: (696) 233-6501, FAX: (696) 235-0139

Facility Information:
 XC2 Facility ID No: 692
 Location ID: 692
 Customer Code: TMYF-8676
 Tester Code: MNMP-6114
 Group Code: 16989-000
 Parcel Number: 02153
 Last Survey Date: 03/09/2008, Freq. (mos.): 60
 Next Survey Date: 03/09/2013 (highlighted as FACILITY_06.1)
 Schedule Code: 03-Mar

#	Event Date	Code	Service Address	Type	Serial Num	Equip Location
1	05/12/11	PASS	6916 W CROOKED ELM	RP	2002039	

Buttons at the bottom: Quick Test Entry, Enter New Test, New BFP Assembly, Send Notice, Delete Item, View Item, Expand List.

Notes:

Facility Letter History

You can access All facility Letter history from the facility page

The screenshot shows the 'Letter History' tab selected in the software interface. The 'Letter History' tab is highlighted with a purple box and a purple arrow. Below the tab, a table displays the following data:

#	Letter Sent Date	Letter Name	Code
6	03/25/16	TEST DUE #1	LTR_1
7	11/24/15	TEST DUE #1	LTR_1

Other visible elements in the interface include:

- Owner Address Info:** Owner Name: STEELE ELEMENTARY SCHOOL, Owner System ID: No: 1000632, Address 1, Address 2, City/ST/Zip: SNOQUALAMISH WA 98215, Contact Name 1: JERAMY, Contact Name 2: KELLY, Phone: (696) 233-6501, FAX: (696) 235-0139.
- Facility Information:** XC2 Facility ID: No: 692, Location ID: 692, Customer Code: TMYP-8676, Tester Code: MNMP-6114, Group Code, Acct Number: 16989-000, Parcel Number: 02153, Last Survey Date: 03/09/2008, Next Survey Date: 03/09/2013 (highlighted as FACILITY_06.1), Schedule Code: 03-Mar.
- Service Type:** ACTIVE, Facility Status: ACTIVE, Color: 5902412.
- Assigned Inspector:** (empty), Auth. Tester Company: (empty), SIC Code: (empty), Rate Code: (empty).
- Buttons:** Quick Test Entry, Enter New Test, New BFP Assembly, Send Notice, Delete Item, View Commu..., Expand List, Pictures/Site M..., MapQuest, Qty BFP: 2, Add Facility, Search, Report/Print, Cancel, Save.

Notes:

Survey History

You can access past survey information from the Facility Screen

The screenshot shows the 'XC2 Software' interface for a facility named 'STEELE ELEMENTARY SCHOOL'. The 'Surveys/Inspections' tab is active, displaying a table of survey history. A red arrow points to the 'Survey Status' column header in the table.

#	Activity Date	Code	Survey By	Survey Status	Violations	Q. Qty Rem	Last Inspect	Next Inspect	Cost
1	02/08/08	SURVEY	ENRICO ALBINONI	Complete	2	0.00	03/09/08		
					2.00	0.00			

Facility Information: Steele Elementary School, 6916 W CROOKED ELM CT, SNOQUALAMISH, WA 98215. Owner System ID: 1000632. XC2 Facility ID: 692. Next Survey Date: 03/09/2013 (FACILITY_06.1).

Notes:



XC2 Software Knowledge Base



How to Add A New Facility

KB Asset ID: 24

How to Add a New Facility Record in XC2

Facility List

From the Main Screen, Click the Facility List

XC2 Software - BFP : City of Snoqualamish, WA: * Facility: 74 of 74 Records : Multi-Line : FILTER ON

User Options Add Delete Find Sort Show All Export Saved Search Report

List Views Facility 74 of 74 Records Find: Facility Name Go!

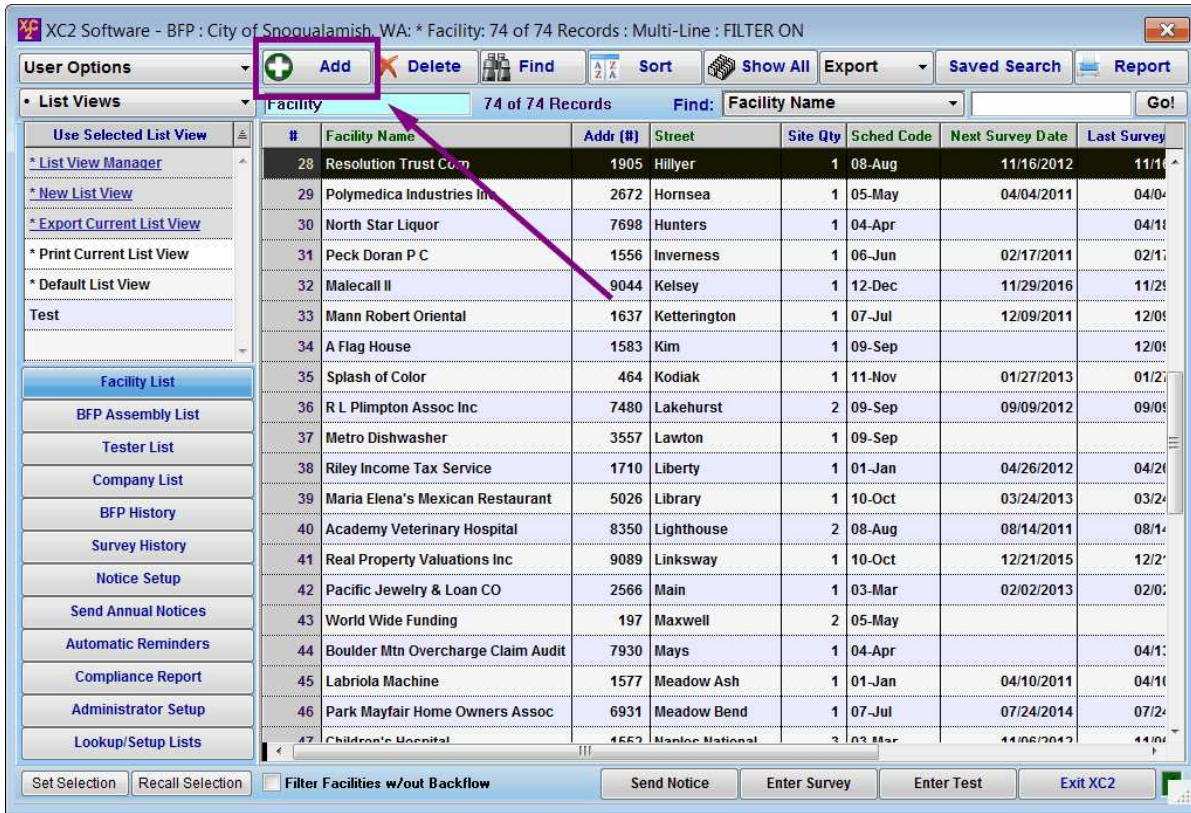
#	Facility Name	Addr (#)	Street	Site Qty	Sched Code	Next Survey Date	Last Survey
28	Resolution Trust Corp	1905	Hillyer	1	08-Aug	11/16/2012	11/16/2012
29	Polymedica Industries Inc	2672	Hornsea	1	05-May	04/04/2011	04/04/2011
30	North Star Liquor	7698	Hunters	1	04-Apr		04/11/2011
31	Peck Boran P C	1556	Inverness	1	06-Jun	02/17/2011	02/17/2011
32	Malecall II	9044	Kelsey	1	12-Dec	11/29/2016	11/29/2016
33	Mann Robert Oriental	1637	Ketterington	1	07-Jul	12/09/2011	12/09/2011
34	A Flag House	1583	Kim	1	09-Sep		12/09/2011
35	Splash of Color	464	Kodiak	1	11-Nov	01/27/2013	01/27/2013
36	R L Plimpton Assoc Inc	7480	Lakehurst	2	09-Sep	09/09/2012	09/09/2012
37	Metro Dishwasher	3557	Lawton	1	09-Sep		
38	Riley Income Tax Service	1710	Liberty	1	01-Jan	04/26/2012	04/26/2012
39	Maria Elena's Mexican Restaurant	5026	Library	1	10-Oct	03/24/2013	03/24/2013
40	Academy Veterinary Hospital	8350	Lighthouse	2	08-Aug	08/14/2011	08/14/2011
41	Real Property Valuations Inc	9089	Linksway	1	10-Oct	12/21/2015	12/21/2015
42	Pacific Jewelry & Loan CO	2566	Main	1	03-Mar	02/02/2013	02/02/2013
43	World Wide Funding	197	Maxwell	2	05-May		
44	Boulder Mtn Overcharge Claim Audit	7930	Mays	1	04-Apr		04/11/2011
45	Labriola Machine	1577	Meadow Ash	1	01-Jan	04/10/2011	04/10/2011
46	Park Mayfair Home Owners Assoc	6931	Meadow Bend	1	07-Jul	07/24/2014	07/24/2014
47	Children's Hospital	1552	Montic National	3	03-Mar	11/06/2012	11/06/2012

Set Selection Recall Selection Filter Facilities w/out Backflow Send Notice Enter Survey Enter Test Exit XC2

Notes:

Adding a Facility Record

Click the Add Button on the top left of the Screen



Notes:

Enter Facility Information

Type Facility Service Information into Facility Information

XC2 Software - BFP : New Record For: : Facility

Facility Info | Custom Fields | Comments | Expand List

Facility Information | Mailing Addresses | Owner Addresses | Property Manager

Facility Information | X2 Facility ID No: 100412

Facility Name: Bonzos Bagles
 Facility Name 2:
 Service Addr.: 7845 Frankfurter Rd
 Addr. 2:
 City ST Zip: Chinle State AZ Zip 86547
 Contact Name:
 Position:
 Phone:
 EMail Address:
 H2O_System:
 Location ID:
 Facility Code:
 PIN:
 Group Code:
 Acct Number:
 Seq:
 Parcel Number:
 Last Survey Date: / /
 Next Survey Date: / /
 Schedule Code:
 Map Page:
 Assigned Inspector:
 Auth. Tester Company:
 SIC Code:
 Rate Code:
 Address Options
 Update Options
 Meter & GPS Info

#	Serial Num	Type	Size	Mfr	Next Test	Last Test	Active	Count	Status

Enter New Test | New BFP Assembly | Send Notice | Delete Item | View BFP Assembly | Expand List

Pictures/Site Map | Google Maps | Qty BFP 0 | Add Facility | Search | Report/Print | Cancel | Save

Notes:

Confirm The Mailing Address

Click on the Mailing Address Tab.

By Default, the Mailing Address will be the same as the Service Address. If you would like the Mail to be Delivered to a different location, change the address information here.

Click the Save Button

XC2 Software - BFP : Facility : Bonzos Bagles : 7845 Frankfurter Rd : 1 of 1 Selected

Facility Information | Custom Fields | Comments | Expand List

Facility Information | **Mailing Addresses** | Owner Addresses | Property Manager

Mailing Address Info Mail System ID No: 101277

Mailing Name: Bonzos Bagles

Mailing Name 2:

Address 1: 7845 Frankfurter Rd

Address 2:

City/ST/Zip: Chinle State AZ Zip 86547

Country:

Contact 1st:

Position:

Phone:

EMAIL Address:

XC2 Facility ID No: 100412

H2O_System: Farmingdale Metro Water

Location ID:

Facility Code:

PIN:

Group Code:

Acct Number:

Seq:

Parcel Number:

Last Survey Date: / / Freq. (mos.): 0

Next Survey Date: / / FACILITY_06.1

Schedule Code:

Map Page:

Service Type:

Assigned Inspector:

Address Options

Facility Type:

Auth. Tester Company:

Update Options

Facility Status:

SIC Code:

Meter & GPS Info

Facility UD 1:

Rate Code:

BFP Assembly List | BFP Assembly History | Letter History | Surveys/Inspections | All Devices | Facility Areas

#	Serial Num	Type	Size	Mfr	Next Test	Last Test	Active	Count	Status

Enter New Test | New BFP Assembly | Send Notice | Delete Item | View BFP Assembly | Expand List

Pictures/Site Map | Google Maps | Qty BFP: 0 | Add Facility | Search | Report/Print | Cancel | **Save**

Notes:

You have created a New Facility

The screenshot displays the 'XC2 Software' interface for 'BFP : City of Snoqualamish, WA'. The window title is 'XC2 Software - BFP : City of Snoqualamish, WA: * Facility: 1 of 74 Records : Multi-Line : FILTER ON'. The interface includes a menu bar with 'User Options', 'Add', 'Delete', 'Find', 'Sort', 'Show All', 'Export', 'Saved Search', and 'Report'. Below the menu bar, a search bar shows 'Facility' as the selected view, '1 of 74 Records', and a search criteria of 'Facility Name' with the value 'bon'. A table with the following columns is visible: Facility Name, Addr (W), Street, Site Qty, Sched Code, Next Survey Date, and Last Survey Date. The first row is highlighted and contains the data: '1', 'Bonzos Bagles', '7845', 'Frankfurter'. A sidebar on the left lists various options: 'Use Selected List View', 'List View Manager', 'New List View', 'Export Current List View', 'Print Current List View', 'Default List View', 'Test', 'Facility List', 'BFP Assembly List', 'Tester List', 'Company List', 'BFP History', 'Survey History', 'Notice Setup', 'Send Annual Notices', 'Automatic Reminders', 'Compliance Report', 'Administrator Setup', and 'Lookup/Setup Lists'. At the bottom, there are buttons for 'Set Selection', 'Recall Selection', 'Filter Facilities w/out Backflow', 'Send Notice', 'Enter Survey', 'Enter Test', and 'Exit XC2'.

Facility Name	Addr (W)	Street	Site Qty	Sched Code	Next Survey Date	Last Survey
1 Bonzos Bagles	7845	Frankfurter				

Notes:



How to Edit a Facility Record

KB Asset ID: 2615

The page describes how to edit an existing Facility record

Search for the Facility

Search for the Facility you wish to edit

Remember, You can use the search bar on the Main Page or click Find to open the search window.

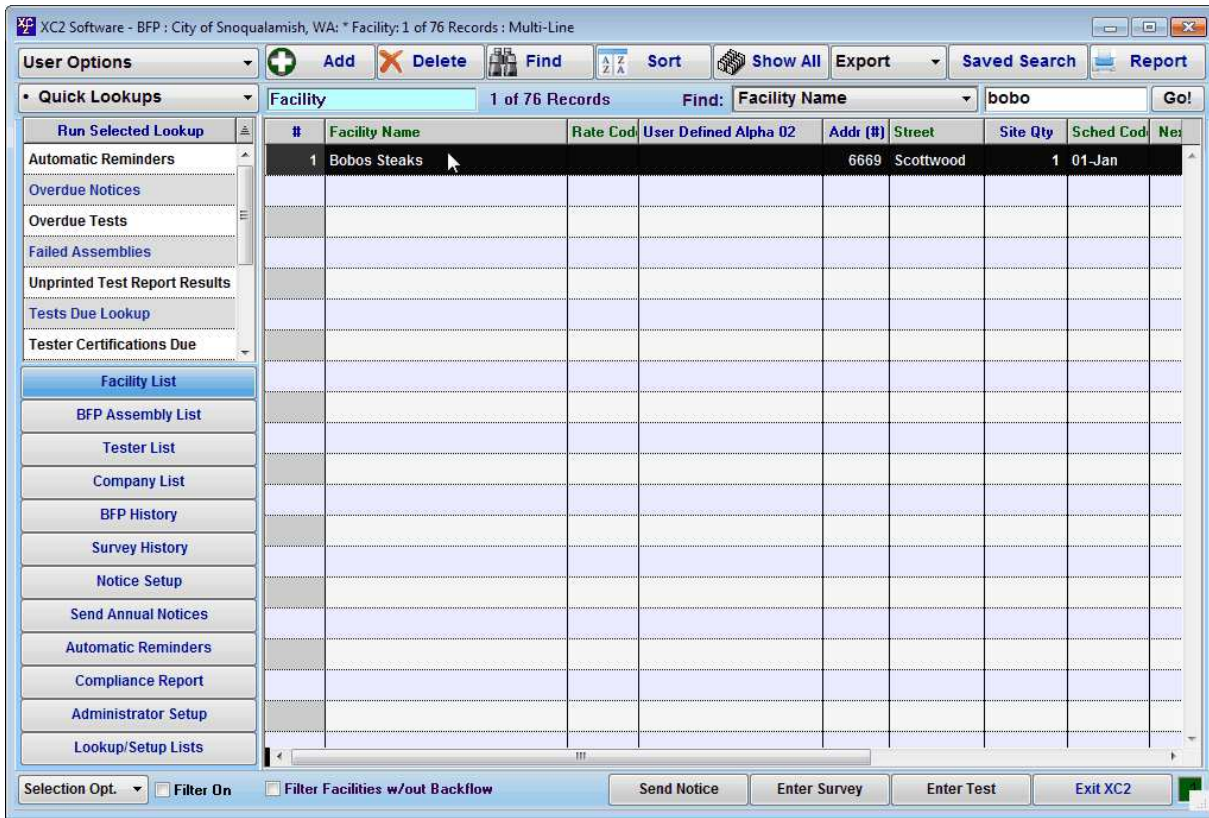
The screenshot shows the 'Facility' window in the XC2 software. The window title is 'XC2 Software - BFP : City of Snoqualamish, WA: * Facility: 76 of 76 Records : Multi-Line'. The interface includes a menu bar with options like 'Add', 'Delete', 'Find', 'Sort', 'Show All', 'Export', 'Saved Search', and 'Report'. Below the menu is a search bar with the text 'Find: Facility Name' and a 'Go!' button. A table of facilities is displayed with columns: #, Facility Name, Rate Cod, User Defined Alpha 02, Addr (#), Street, Site Qty, Sched Cod, and Net. The table contains 27 rows of data. On the left side, there is a 'Quick Lookups' menu with various options, including 'Facility List' which is highlighted with a red box. A red arrow points from the 'Facility List' option to the 'Find' button in the menu bar. Another red arrow points from the 'Find' button to the search bar. A third red arrow points from the search bar to the 'Go!' button. At the bottom of the window, there are buttons for 'Send Notice', 'Enter Survey', 'Enter Test', and 'Exit XC2'. There are also checkboxes for 'Filter On' and 'Filter Facilities w/out Backflow'.

#	Facility Name	Rate Cod	User Defined Alpha 02	Addr (#)	Street	Site Qty	Sched Cod	Net
8	Bethesda At St Anthony Hospital N			1802	Woodcreek	3	07-Jul	
9	Bobos Steaks			6669	Scottwood	1	01-Jan	
10	Boulder Mtn Overcharge Claim Audi			7930	Mays	1	04-Apr	
11	Captain's Chair			6725	Sheridan	4	02-Feb	
12	Children's Hospital			1552	Naples Nation	3	03-Mar	
13	Echosphere Corporation			7210	West View	1	09-Sep	
14	Faust and Wobbler			87	Travelyard	1		
15	Graphic Designees			9044	Kelsey	1	12-Dec	
16	Hospital Shared Services Warehou			5998	Buena Park	1	10-Oct	
17	Hospitality Group Inc The			429	Call Glen	1	10-Oct	
18	LA Salle Partners			5622	Sterling Glen	1	02-Feb	
19	Labriola Machine			1577	Meadow Ash	1	01-Jan	
20	Lakewood Family Medical Clinic Pc			7846	Champions	1	01-Jan	
21	Lanear Ventures			2941	Adara	1	12-Dec	
22	Lanyon Sprinkler CO			4709	Prairie Run	2	06-Jun	
23	Lingerie Etc			1760	Cuyuga	1	12-Dec	
24	Little Ceasar's Pizza			122	Taylor	1	04-Apr	
25	Mann Robert Oriental			1637	Ketterington	1	07-Jul	
26	Maria Elena's Mexican Restaurant			5026	Library	1	10-Oct	
27	Mattress Factory The			6732	Olde Dublin W	1	11-May	

Notes:

Open Facility Record

Once you have found the Facility Record you would like to edit, **Double Click** on the record to open the Facility Record



Notes:

Edit Information

To edit a facility record,

Click into the field you would like to edit.

Note: Clicking into a field that has information will highlight the field blue.

Once the facility information is highlighted, type the changes you would like to make in the field. After you have made your changes, click Save in the bottom right corner of the screen.

The screenshot shows the 'XC2 Software - BFP: Facility: Bobos Steaks: 6669 S Scottwood CT: 1 of 1 Selected' window. The 'Facility Address Info' section is active, with the 'Facility Name' field containing 'Bobos Steaks' and highlighted in blue. Other fields include 'Facility Name 2', 'Service Addr. 6669 S Scottwood CT', 'City ST Zip Snoqualamish WA 98215', 'Contact Name AI', 'Position', 'Phone (696) 233-9231', 'E-mail Address', 'Assigned Inspector', 'Auth. Tester Company', 'SIC Code', 'Rate Code', 'Color 1827130', 'H2O_System Fields Fire Protection', 'Location ID 26', 'Facility Code', 'PIN', 'Group Code', 'Acct Number 21739-0', 'Seq', 'Parcel Number', 'Last Survey Date 06/01/2009', 'Freq. (mos.) 60', 'Next Survey Date 06/01/2014', and 'Map Page'. A table below shows a single entry for an injector with serial number 648094. The 'Save' button is circled in red.

#	Hazard Type	Serial Num	Type	Size	Mfr	Next Test	Last Test	Active	Count	Status	Service Address	Equip Location
1	Injector, Fertilizer	648094	PVB	2"	Ames	05/25/2014	01/20/2011	✓	Y	Installed	6669 S Scottwood CT	

Notes:



How To Change the Address Options in a Facility Record

KB Asset ID: 55

This page describes how to change the Address options for individual Facility Records in XC2.

What Are Address Options

Address Options in XC2 Allow Users to choose

- 1) Where notifications are mailed to
- 2) If a notice be sent at all
- 3) If a notice is sent, should it be sent by Email? (Extra license required)
- 4) Should the Mailing record be updated with the information in your Billing System (extra licensing required)
- 5) Should the Mailing and/or Owner Address be the same as the Service Address.

These options are chosen on an individual Facility Record Basis

Below is XC2's Address Option Screen

Facility Mailing/Email Options

Address Options

	Email Addresses	Separate Multiple Recipients with a "Comma"
<input checked="" type="checkbox"/> Mail To: Mailing Address	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Mail To: Service Address	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Mail To: Owner Address	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Mail To: Property Manager	<input type="text"/>	<input type="text"/>

<input type="checkbox"/> Send Notices via Email	NOTE: Email Requires Optional License
<input type="checkbox"/> Send No Notices	

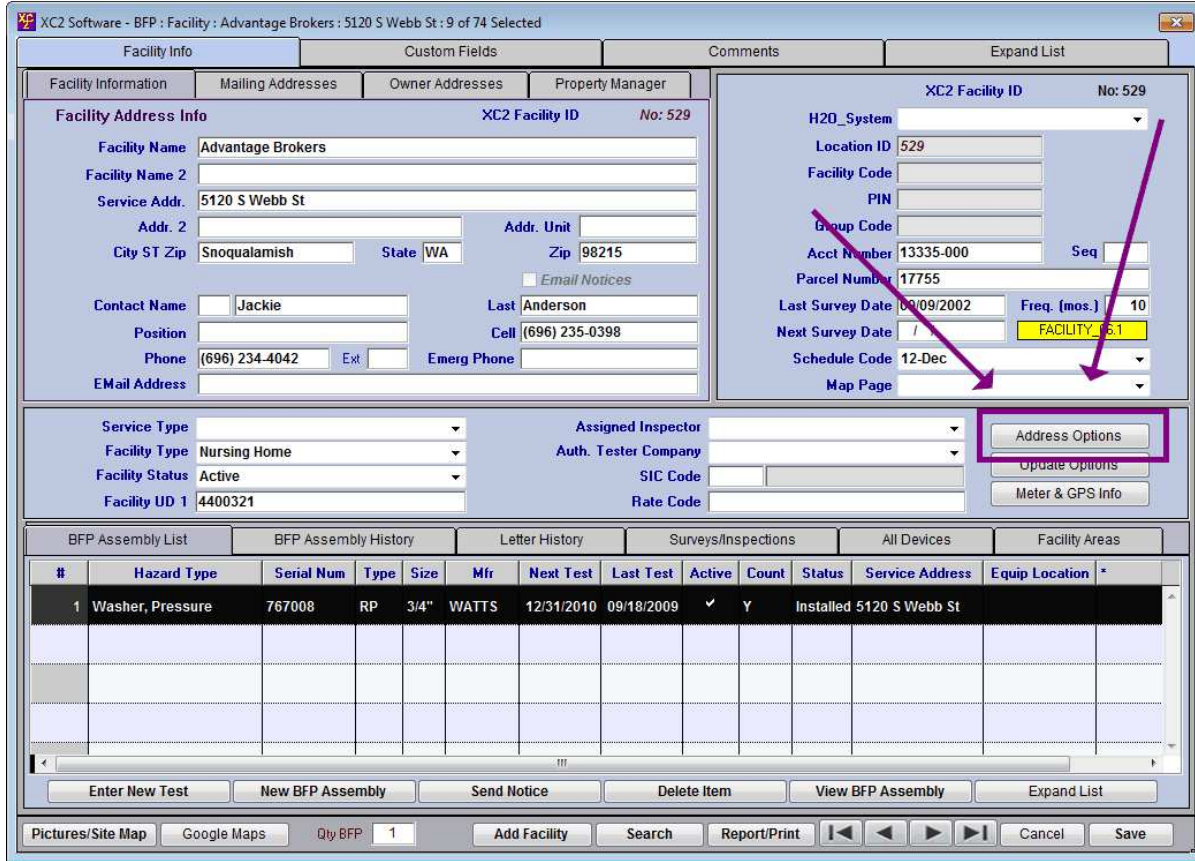
Update from Billing System Options	
<input type="checkbox"/> Mailing Address - Same As Service Address	<input type="checkbox"/> No Mailing Address Update
<input type="checkbox"/> Owner Address - Same As Service Address	<input type="checkbox"/> No Owner Address Update
	<input type="checkbox"/> No Service Address Update

Notes:

Open a Facility Record

To access Address Options in XC2,

- Open a Facility Record
- Click Address Options



Notes:

Change Address

To change the Mailing Location, check the Mail to Box that is next to the correct address location

The Mail To Boxes are located in the top section of the Mailing Options Screen

Below I chose to change the mailing location from the Mailing Address to the Propert Manager Address

Facility Mailing/Email Options

Address Options	Email Addresses	Separate Multiple Recipients with a "Comma"
<input checked="" type="checkbox"/> Mail To: Mailing Address	<input type="text"/>	
<input type="checkbox"/> Mail To: Service Address	<input type="text"/>	
<input type="checkbox"/> Mail To: Owner Address	<input type="text"/>	
<input type="checkbox"/> Mail To: Property Manager	<input type="text"/>	
<input type="checkbox"/> Mail To: Authorized Testing Company		

Send Notices via Email
NOTE: Requires Optional License
Can be run in "Demo" Mode

Send No Notices (Automatic Notices Only)

Update from Billing System Options	
<input type="checkbox"/> Mailing Address - Same As Service Address	<input type="checkbox"/> No Mailing Address Update
<input type="checkbox"/> Owner Address - Same As Service Address	<input type="checkbox"/> No Owner Address Update
	<input type="checkbox"/> No Service Address Update

OK

Notes:

Email and Exemptions

In the Second Section of the Mailing Options Screen you will find two check boxes

1) Send Notices via email

If you would like to send the notice via email, check send notices via email.

Note: If you would like to send a notice via email it will require a separate license. Contact XC2 for more information

2) Send No Notices

Send no notices will exclude notices from printing when using Automatic Notices

Facility Mailing/Email Options

<p>Address Options</p> <p><input checked="" type="checkbox"/> Mail To: Mailing Address:</p> <p><input type="checkbox"/> Mail To: Service Address</p> <p><input type="checkbox"/> Mail To: Owner Address</p> <p><input type="checkbox"/> Mail To: Property Manager</p> <p><input type="checkbox"/> Mail To: Authorized Testing Company</p>	<p>Email Addresses</p> <input style="width: 100%; height: 20px;" type="text"/> <input style="width: 100%; height: 20px;" type="text"/> <input style="width: 100%; height: 20px;" type="text"/> <input style="width: 100%; height: 20px;" type="text"/>	<p>Separate Multiple Recipients with a "Comma"</p>
<p><input type="checkbox"/> Send Notices via Email NOTE: Requires Optional License Can be run in "Demo" Mode</p> <p><input type="checkbox"/> Send No Notices (Automatic Notices Only)</p>		
<p><input type="checkbox"/> Mailing Address - Same As Service Address</p> <p><input type="checkbox"/> Owner Address - Same As Service Address</p>		<p>Update from Billing System Options</p> <p><input type="checkbox"/> No Mailing Address Update</p> <p><input type="checkbox"/> No Owner Address Update</p> <p><input type="checkbox"/> No Service Address Update</p>

Notes:

Update Options

In the 3rd section of Address Options, you can

1) Exclude the Facility from Billing System Updates

Note: XC2 Update From Billing requires optional registration. Contact XC2 for more information.

2) Choose to have the Facility and/or Mailing Information to be the same as the Service Address

When you are finished making you selections, click the ok button to save

Facility Mailing/Email Options

Address Options	Email Addresses	Separate Multiple Recipients with a "Comma"
<input checked="" type="checkbox"/> Mail To: Mailing Address	<input type="text"/>	
<input type="checkbox"/> Mail To: Service Address	<input type="text"/>	
<input type="checkbox"/> Mail To: Owner Address	<input type="text"/>	
<input type="checkbox"/> Mail To: Property Manager	<input type="text"/>	
<input type="checkbox"/> Mail To: Authorized Testing Company		

Send Notices via Email
NOTE: Requires Optional License
Can be run in "Demo" Mode

Send No Notices (Automatic Notices Only)

<input type="checkbox"/> Mailing Address - Same As Service Address <input type="checkbox"/> Owner Address - Same As Service Address	<p style="text-align: center;">Update from Billing System Options</p> <input type="checkbox"/> No Mailing Address Update <input type="checkbox"/> No Owner Address Update <input type="checkbox"/> No Service Address Update
--	---

Notes:



XC2 Software Knowledge Base



Adding Pictures To A Facility

KB Asset ID: 3538

You can store images and documents in a facility record to be recalled and/or printed.

Open Facility Record

Click the button

- Pictures/Site Map

The screenshot shows the 'XC2 Software - BFP : Facility : Ollie's Roundup : 9451 S Banbridge Ln : 5 of 76 Selected' window. The interface is divided into several sections:

- Facility Information:** Includes fields for Facility Name (Ollie's Roundup), Facility Name 2, Service Addr. (9451 S Banbridge Ln), City ST Zip (Snoqualamish WA 98215), Contact Name (Vern Thompson), Position, Phone ((696) 235-6142), and EMail Address.
- Custom Fields:** Shows 'XC2 Facility ID No: 461'.
- Comments:** Lists various codes and dates: H2O_System (Lennon River Water), Location ID (461), Customer Code (WSNY-8934), Tester Code (TZLW-1528), Group Code, Acct Number (12105-000), Parcel Number (17952), Last Survey Date (11/13/2004), Next Survey Date (11/13/2011), and Schedule Code (11-Nov).
- Facility Details:** Includes Service Type, Facility Type (Metal plating industries), Facility Status (Active), Facility UD 1 (3609751), Assigned Inspector, Auth. Tester Company, SIC Code, and Rate Code.
- Assembly List:** A table with columns: #, Hazard Type, Serial Num, Type, Size, Mfr, Next Test, Last Test, Active, Count, Status, Service Address, and Equip Location. One entry is visible: #1, Washer, Pressure, 551097, RP, 1 1/4, WATTS, 11/30/11, 11/14/10, checked, Y, Installed, 9451 S Banbridge.
- Buttons:** Includes 'Quick Test Entry', 'Enter New Test', 'New BFP Assembly', 'Send Notice', 'Delete Item', 'View BFP Asse...', 'Expand List', 'Exclude Inactive', 'Pictures/Site M...', 'Google Maps', 'Qty BFP 1', 'Add Facility', 'Search', 'Report/Print', 'Cancel', and 'Save'.

Notes:

Load Document

XC2 Picts / Site Map : BFP : Facility : Ollie's Roundup : 9451 S Banbridge Ln : 5 of 76 Selected

Help X

Item Name	Date	Type	S

PDF Files: Double-Click above to Display PDF

Title:

Location: Storage Type:

More Info | Open Document | Open Doc Folder

Date

Add Image or Document to XC2 Picts

Width Height .00 kb

Load Document	Save to Disk	Open Docume...	Reload Picture	Move/Rename Document on Disk	Open Document	
Show One Only	Preferences	Delete Item	Expand Image	Print Image	Site Map	Done

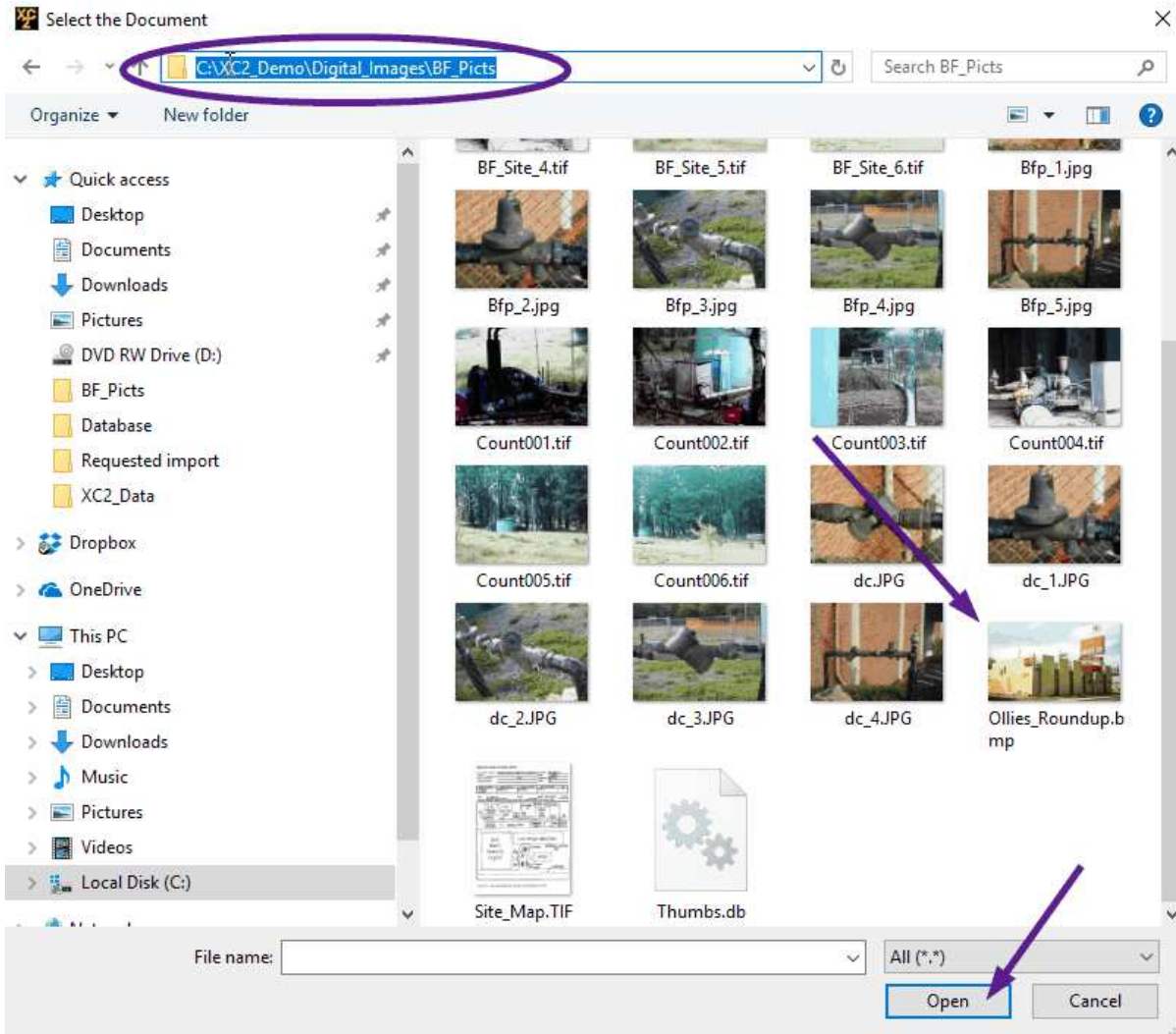
Notes:

Navigate to image location

When the windows explorer window opens, navigate to where the digital image or document is stored

Highlight the file.

Click Open



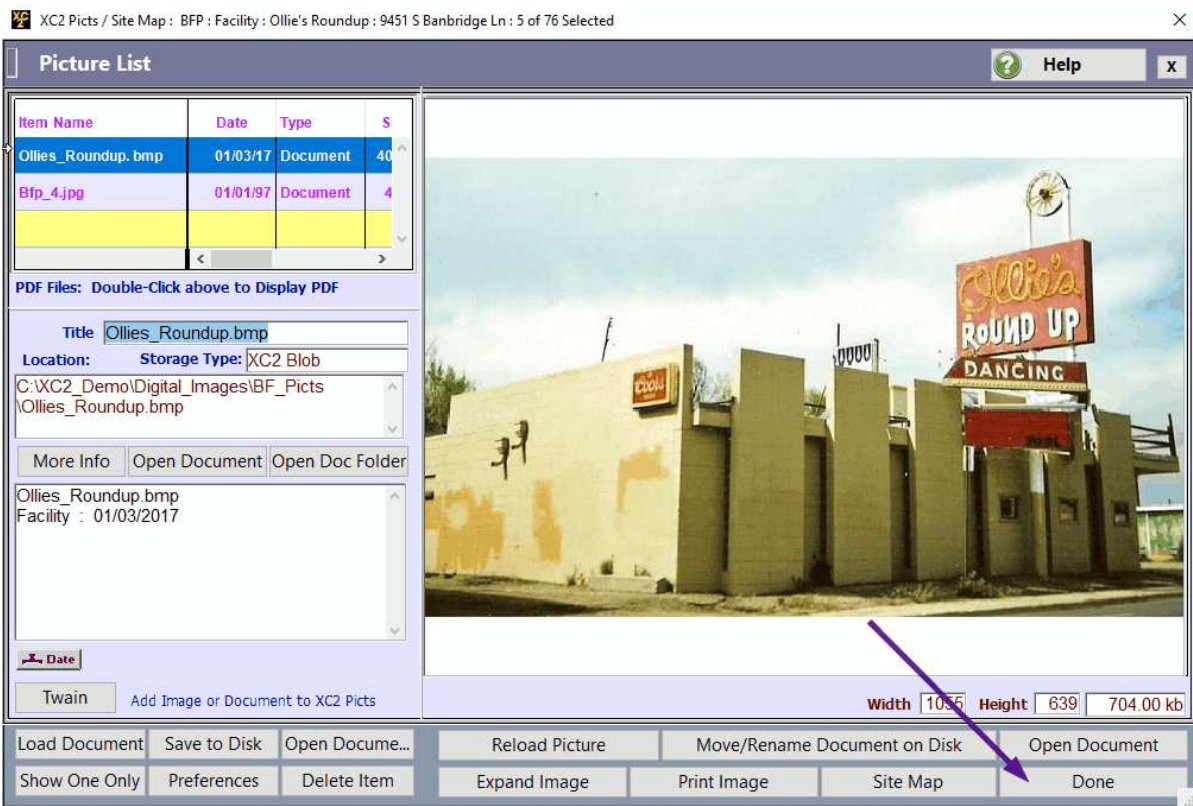
Notes:

Click Done

Your image has been added

Click Done if you are finished.

Click the Load Document if there are additional images to load



Notes:



XC2 User Manual

Assembly Records

- **What Is An Assembly Record?**
- **Assembly Screen Overview**
- **How to Create a New Assembly Record from Main Screen**
- **How to Create a New Assembly Record from a Facility**
- **How to Edit an Existing Assembly Record**
- **Adding Pictures to an Assembly Record**
- **Keep Your Backflow Models List Updated**



XC2 Software Knowledge Base



Assembly Record

KB Asset ID: 3008

This page describes what an assembly record means in XC2 and describes parts that makeup an assembly record

Here is an Assembly record

The purpose of the assembly record is to hold information specific to the backflow preventer.

Types of information typically stored in an assembly record include

- 1) Assembly Information (Make, Model, Size, Serial Number etc...)
- 2) Next Test Dates
- 3) Meter Information
- 4) Service Information (facility name, service address of BFP)

The following section will go over Backflow Assembly Records

The screenshot displays the 'XC2 Software - BFP : Zona's Tamales : Location ID: 14280 : RP : Facility ID: 539 : 1 of 4 Selected' window. The interface is divided into several sections:

- Facility Address Info:** Facility Name: Zona's Tamales, Service Addr.: 6798 W Roswell Pl, City ST Zip: Snoqualamish WA 98215.
- Facility Contact Info:** Contact Name: Taylor, Last: Carter, Cell: (696) 236-7774.
- Location/Meter Info:** Location ID: 14280, Meter Acct Num: 14280-0, Meter #: N60102609, Service Type: 2", Hazard Type: Condenser, Medical.
- Assembly Info:** Type: RP, Size: 2", Mfr: Febco, Model: 825-Y, Serial Num: AC-0071, Status: Installed, Next Test Due: 03/28/2015, Frequency: 12 Months.
- Test History:** Last/Dflt Tester: Alphonzo Hernandez, Last Test Date: 05/19/2014, Result: PASS.
- Inst/Replace By:** Install Date, Install Due, Replacement Due Date, Inst/Replace Date, Permit Num, Schedule Code: 07-Jul, Protection Type: Containment.
- Options:** Inactive, Flood Protect, Back Pressure, Cont. Pressure, Back Siphonage, Impropr. Appl, Impropr. Install.

Notes:



XC2 Software Knowledge Base



Assembly Screen Overview

KB Asset ID: 3522

This page describes the different parts of XC2 's Assembly Screen

Service Address Information

Service Address information appears upon default when opening an Assembly Record.

By default, Assembly Service Address information from a backflow assembly will be the same as the Facility Service Address information

Note: Assembly Service Information can be made different from Facility Service Address Information.

The screenshot shows the 'Service Address Info' tab in the XC2 software. The main window title is 'XC2 Software - BFP: BOBS BBQ: Location ID: : RP: Facility ID: 100415: 1 of 1 Selected: WEB SERVER ON: 80: WEB BFP Test'. The interface is divided into several sections:

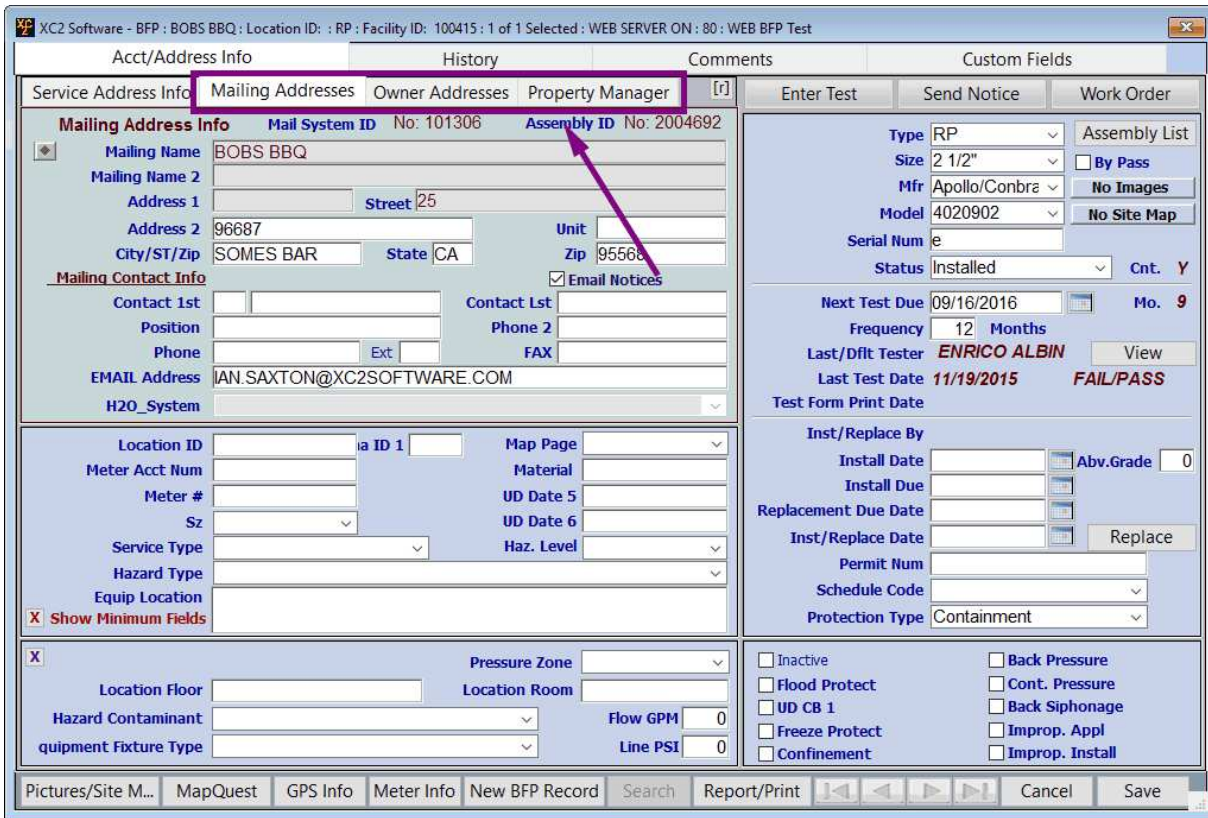
- Facility Address Info:** Facility Name: BOBS BBQ, Service Addr.: 25, Addr. 2: 96687, City ST Zip: SOMES BAR CA, Zip: 95688.
- Facility Contact Info:** Contact Name: IAN SAXTON, EMail Address: IAN.SAXTON@XC2SOFTWARE.COM.
- Test Parameters:** Type: RP, Size: 2 1/2", Mfr: Apollo/Conbra, Model: 4020902, Status: Installed, Next Test Due: 09/16/2016, Frequency: 12 Months, Last/Dflt Tester: ENRICO ALBIN, Last Test Date: 11/19/2015, Test Result: FAIL/PASS.
- Location and Meter Info:** Location ID, Meter Acct Num, Meter #, Sz, Service Type, Hazard Type, Equip Location.
- Pressure and Protection Settings:** Pressure Zone, Location Room, Flow GPM, Line PSI, and various protection checkboxes like Inactive, Flood Protect, UD CB 1, Freeze Protect, Confinement, Back Pressure, Cont. Pressure, Back Siphonage, Impropr. Appl, and Impropr. Install.

Notes:

Mailing Owner and Property Manager information

You can access Assembly, Mailing Owner and Property manager address information by clicking on its related Tab

Like Service Information, you can have separate address information from all three address tabs.



Notes:

Physical Assembly Information

The Top Right will display the physical information related to the assembly

- Type
- Size
- Manufacture
- Model
- Serial Number
- Status

The screenshot shows the 'Physical Assembly Information' section of the XC2 Software. The window title is 'XC2 Software - BFP: TAFOYA ELECTRIC CHANGE : Location ID: : DCDA : Facility ID: 151 ; 3 of 113 Selected : WEB SERVER ON: 80 : WEB BFP Test'. The interface is divided into several tabs: 'Acct/Address Info', 'History', 'Comments', and 'Custom Fields'. The 'Acct/Address Info' tab is active, showing 'Service Address Info', 'Mailing Addresses', 'Owner Addresses', and 'Property Manager'. The 'Facility Address Info' section is highlighted with a yellow background and contains the following data:

- XC2 Facility ID No: 151
- Assembly ID No: 2000621
- Facility Name: TAFOYA ELECTRIC CHANGE
- Service Addr: 1795 S CHURCH VIEW CT
- City ST Zip: SNOQUALAMISH WA 98215
- Facility Contact Info: Contact Name BARRY, Last YOUNG, Cell (696) 233-9525
- H2O_System: LENNON RIVER WATER

The 'Enter Test' section on the right contains the following data:

- Type: DCDA
- Size: 2"
- Mfr: Watts
- Model: 709DCDA-VU
- Serial Num: 608656
- Status: Installed
- Next Test Due: 01/31/2017
- Frequency: 12 Months
- Last/Dflt Tester: NELSON BRYA
- Last Test Date: 12/07/2015 (FAIL)
- Inst/Replace By: DEVIN ROBINSON
- Install Date: 08/02/2004
- Inst/Replace Date: 02/25/2015
- Schedule Code: 01-Jan
- Protection Type: Isolation

A red arrow points from the 'Facility Name' field to the 'Type' field in the 'Enter Test' section. The bottom of the window features a toolbar with buttons for 'Pictures/Site M...', 'MapPoint', 'GPS Info', 'Meter Info', 'New BFP Record', 'Search', 'Report/Print', 'Cancel', and 'Save'.

Notes:

Next and Last Test Information

Below the physical information is the Next and last test information

- Next Test Due
- Test Frequency
- Last Tester
- Last test date and Status
- Test Form Print Date

The screenshot shows the 'XC2 Software' interface for a facility named 'TAFOYA ELECTRIC CHANGE'. The 'Next Test Due' section is highlighted with a red box and contains the following information:

- Next Test Due: 01/31/2017 (Mo. 1)
- Frequency: 12 Months
- Last/Dflt Tester: NELSON BRYAN (View)
- Last Test Date: 12/07/2015 (FAIL)
- Test Form Print Date: 08/01/2014

A red arrow points to the 'Last Test Date' field. Other visible fields include 'Type: DCDA', 'Size: 2"', 'Mfr: Watts', 'Model: 709DCDA-VU', 'Serial Num: 608656', and 'Status: Installed'. The 'Inst/Replace By' field is 'DEVIN ROBINSON'.

Notes:

Installation and Replacement Information

Right Below Test Information you will find the installation and Replacement information

- Who installed or replaced the BFP
- Initial Install Date
- Next Install Due Date
- Replacement Due
- Last install or Replacement Date
- Permit Number
- Schedule Code
- Protection Type

XC2 Software - BFP : TAFOYA ELECTRIC CHANGE : Location ID : DCDA : Facility ID: 151 : 3 of 113 Selected : WEB SERVER ON : 80 : WEB BFP Test

Acct/Address Info	History	Comments	Custom Fields
Service Address Info Mailing Addresses Owner Addresses Property Manager [r] Facility Address Info XC2 Facility ID No: 151 Assembly ID No: 2000621 Facility Name: TAFOYA ELECTRIC CHANGE Facility Name 2: Service Addr.: 1795 S CHURCH VIEW CT Addr. 2: City ST Zip: SNOQUALAMISH State WA Zip 98215 Facility Contact Info Contact Name: BARRY Last: YOUNG Position: Phone: (696) 235-0733 Ext: Cell: (696) 233-9525 #2: (696) 233-9525 EMail Address: H2O_System: LENNON RIVER WATER	Enter Test Send Notice Work Order Type: DCDA Assembly List Size: 2" <input type="checkbox"/> By Pass Mfr: Watts <input type="checkbox"/> No Images Model: 709DCDA-VU <input type="checkbox"/> No Site Map Serial Num: 608656 Status: Installed Cnt. Y Next Test Due: 01/31/2017 Mo. 1 Frequency: 12 Months Last/Dflt Tester: NELSON BRYAI View Last Test Date: 12/07/2015 FAIL Test Form Print Date: 08/01/2014	Location ID: ia ID 1: Map Page: Meter Acct Num: 7281-000 Material: Meter #: UD Date 5: Sz: UD Date 6: Service Type: Haz. Level: Hazard Type: Equip Location: <input checked="" type="checkbox"/> Show Minimum Fields	Inst/Replace By: DEVIN ROBINSON Install Date: 08/02/2004 Abv. Grade: 0 Install Due: Replacement Due Date: Inst/Replace Date: 02/25/2015 Replace Permit Num: Schedule Code: 01-Jan Protection Type: Isolation
<input checked="" type="checkbox"/> Location Floor: Hazard Contaminant: Equipment Fixture Type: Pressure Zone: Location Room: Flow GPM: 0 Line PSI: 0	<input type="checkbox"/> Inactive <input type="checkbox"/> Back Pressure <input type="checkbox"/> Flood Protect <input type="checkbox"/> Cont. Pressure <input type="checkbox"/> UD CB 1 <input type="checkbox"/> Back Siphonage <input type="checkbox"/> Freeze Protect <input type="checkbox"/> Impropr. Appl <input type="checkbox"/> Confinement <input type="checkbox"/> Impropr. Install	Pictures/Site M... MapPoint GPS Info Meter Info New BFP Record Search Report/Print Cancel Save	

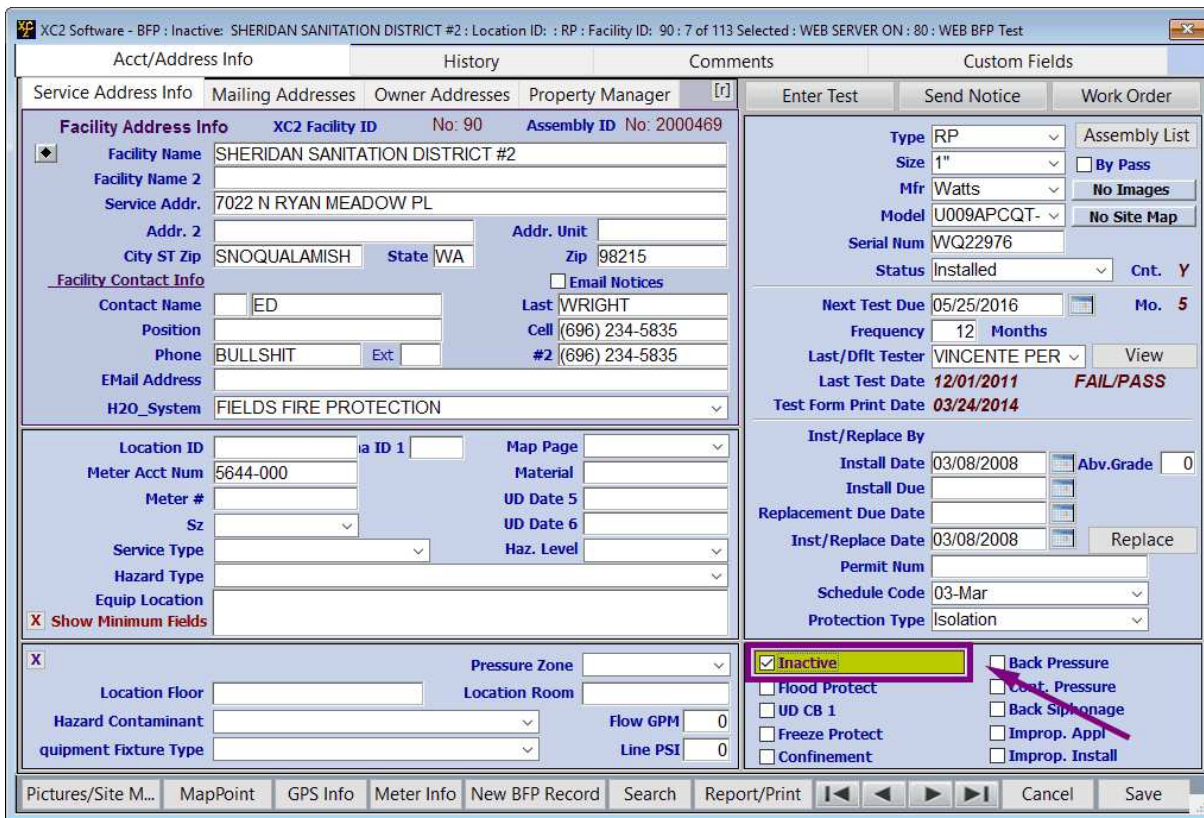
Notes:

Make Assembly Inactive

If the Backflow Assembly is Inactive

You can check this box

When a backflow assembly is made inactive, it will not be do for an annual test.



Notes:



How to Create a New Assembly Record

KB Asset ID: 2429

Describes how to Create a new Backflow Assembly Record

Select Assembly List

Select the Assembly List

The screenshot shows the 'XC2 Software - BFP : City of Snoqualamish, WA: * BFP Assembly: 1 of 94 Records : Multi-Line' window. The interface includes a top toolbar with 'Add', 'Delete', 'Find', 'Sort', 'Show All', 'Export', 'Saved Search', and 'Report' buttons. Below the toolbar is a 'Quick Lookups' section with a dropdown menu set to 'BFP Assembly' and a search field for 'Facility Name'. The main area is a data table with the following content:

#	Facility Name	Addr (#)	Street	Serial Num	Mfr	Model	Next Test
1	RAINBOW REBUILDERS	123	WEST	829932	Watts	709DCDA	01/31/2012

On the left side, there is a 'Run Selected Lookup' sidebar menu. The 'BFP Assembly List' option is highlighted with a red box, and a red arrow points to it. Other options in the sidebar include 'Automatic Reminders', 'Overdue Notices', 'Overdue Tests', 'Failed Assemblies', 'Unprinted Test Report Results', 'Tests Due Lookup', 'Tester Certifications Due', 'Facility List', 'Tester List', 'Company List', 'BFP History', 'Survey History', 'Notice Setup', 'Send Annual Notices', 'Automatic Reminders', 'Compliance Report', 'Administrator Setup', and 'Lookup/Setup Lists'. At the bottom of the window, there are buttons for 'Set Selection', 'Recall Selection', a checked checkbox for 'Exclude Inactive BFP Assembly Records', and buttons for 'Send Notice', 'Enter Survey', 'Enter Test *', and 'Exit XC2'.

Notes:

Enter Facility Information

The Assembly Record has to be Part of a Facility Record

To Find the Facility Record, type in a portion of the facility name, then press the Tab Button on your Keyboard.

The screenshot shows the 'XC2 Software - BFP : New Record For: : BFP Assembly' window. The interface is divided into several sections:

- Facility Address Info:** Includes fields for Facility Name (highlighted with 'bon'), Service Address, City, State, and Zip.
- Facility Contact Info:** Includes Contact Name, Position, Phone, and EMail Address.
- Location and Meter Info:** Includes Location ID, Meter Acct Num, Meter #, and various dates.
- Facility Area:** Includes Facility Area, Location Floor, Hazard Contaminant, and Equipment Fixture Type.
- Right Panel (Test/Notice/Work Order):** Includes Type, Size, Mfr, Model, Serial Num, Status (set to 'Installed'), Next Test Due date, Frequency (set to '12 Months'), and various installation and protection options.

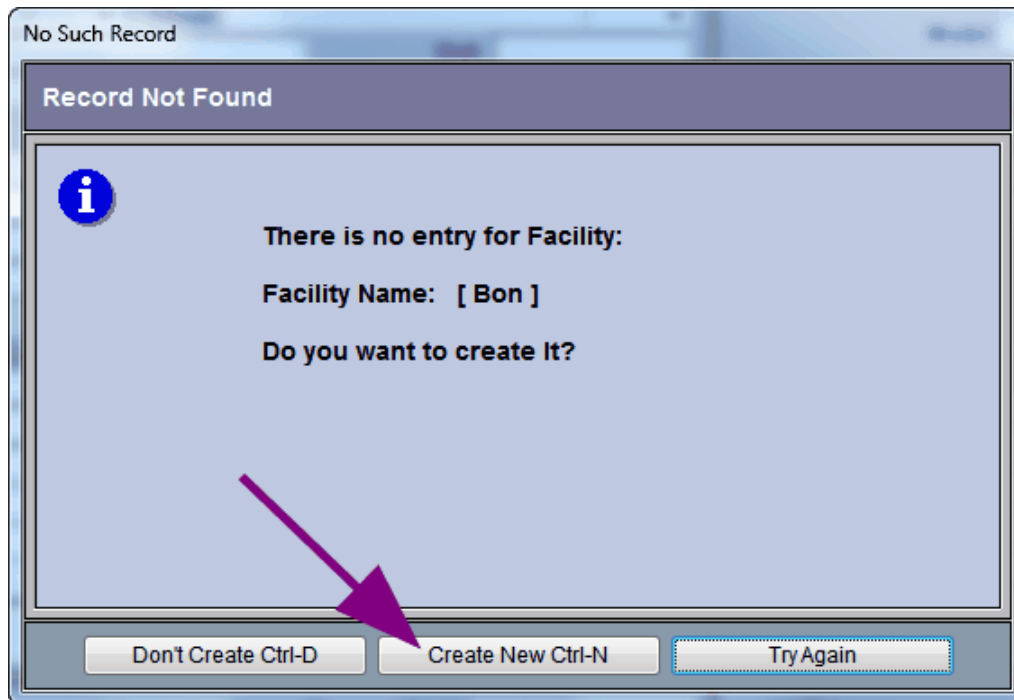
A red arrow points from the 'Facility Name' field to the 'Enter Test' button.

Notes:

Create New If Facility Does Not Exist

If you receive a message that the Facility Does Not Exist and you are sure you have entered the correct information,

- Click Create New



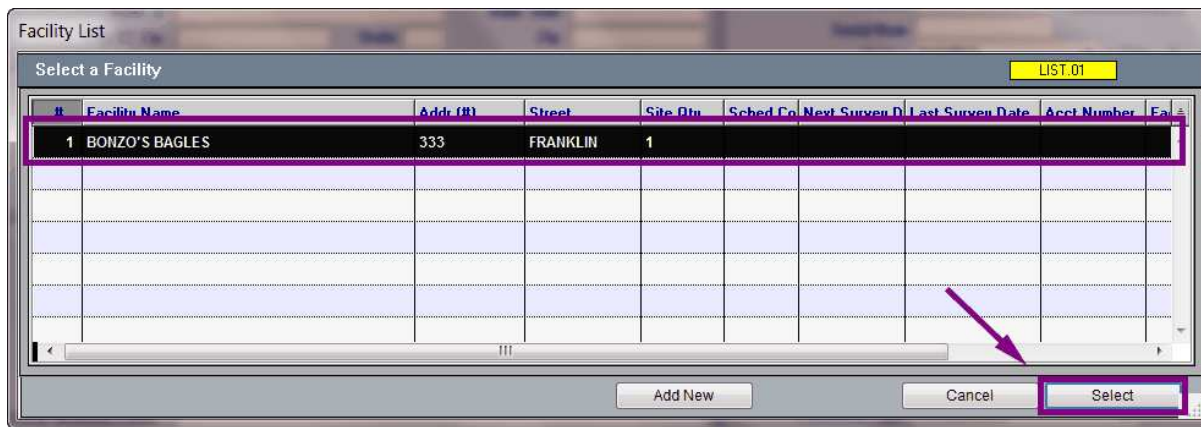
Notes:

Select the Record

If there are any facility records that begin with the data entered in the facility name field you will be presented with a list of records to choose from.

This is especially handy in guarding against creating duplicate facility records.

- Highlight the Facility Record then click the Select button



Notes:

Enter Assembly Information

Enter all information into their Proper fields

1. Assembly Type
2. Size
3. Manufacture
4. Model
5. Serial Number
6. Status
7. Next Test Due Date
8. Fequency Tested (In Months)

Click Save when Finished

Notes:



How to create a new Assembly Record from within a Facility Record

KB Asset ID: 19

This page describes how to create a new assembly record from within a facility record

Adding Assemblies

First Search for the facility record.

Open the record by double clicking

The screenshot shows the XC2 software interface with a search for 'Zona's Tamales' facility. The search criteria are 'Facility Name' and 'zon'. The results table shows one record with the following details:

#	Facility Name	Addr (#)	Street	Site Qty	Sched Code	Next Survey Date	La
1	Zona's Tamales	6798	Roswell	1	07-Jul	02/05/12	

The interface also includes a 'Favorite Tasks' sidebar with 'Facility List' highlighted, and a toolbar at the bottom with buttons for 'Send Notice', 'Enter Survey', 'Enter Test', and 'Exit XC2'.

Notes:

Facility Record

Once inside the record

Click on New BFP Record

XC2 Software - BFP : Facility : Zona's Tamales : 6798 W Roswell Pl : 1 of 1 Selected

Facility Info | Custom Fields | Comments | Expand List

Facility Information | Mailing Addresses | Owner Addresses | Property Manager

Facility Address Info | XC2 Facility ID No: 539

Facility Name: Zona's Tamales
 Facility Name 2:
 Service Addr.: 6798 W Roswell Pl
 Addr. 2:
 City ST Zip: Snoqualamish WA Zip 98215
 Contact Name: Taylor Last: Carter
 Position:
 Phone: (696) 234-3456 Ext:
 Emerg Phone:
 EMail Address:
 Email Notices:

XC2 Facility ID No: 539

H2O_System:
 Location ID: 539 [Edit Number](#)
 Customer Code: YUVY-7242 [For Customer](#)
 Tester Code: JMWQ-6859 [For Tester](#)
 Group Code: [Edit Code](#)
 Acct Number: 14280-000 [Seq](#)
 Parcel Number: 01035
 Last Survey Date: 02/05/2007 Freq. (mos.): 60
 Next Survey Date: 02/05/2012 **FACILITY_06.1**
 Schedule Code: 07-Jul
 Hazard Type (X):

Service Type:
 Facility Type: Agricultural (farms and dairies)
 Facility Status: Active
 BLDG #: 4720200

Assigned Inspector:
 Auth. Tester Company:
 SIC Code:
 Rate Code:

Address Options
 Update Options
 Meter & GPS Info

[W] BFP Assembly List | BFP Assembly History | Letter History | Surveys/Inspections | All Devices | Facility Areas

#	Hazard Type	Serial Num	Type	Size	Mfr	Next Test	Last Test	Active	Count	Status	Service Address	Equip Location
1	Condenser, Medical	AC-0071	RP	2"	FEBCO	03/28/10	04/24/09	✓	Y	Installer	6798 W Roswell Pl	W/B10Fwy@90(

Quick Test Entry | Enter New Test | **New BFP Assembly** | Send Notice | Delete Item | View BFP Assembly | Expand List

Pictures/Site Map | MapQuest | Qty BFP: 1 | Add Facility | Search | Report/Print | Cancel | Save

Notes:



How to Edit Backflow Assembly Information

KB Asset ID: 2616

Page describe How to Edit Backflow Assembly Information

Search for the Assembly Record

You can search for the assembly record from the main page or you can search for the Facility record from the main page.

When you find your assembly record, double click to open the record.

The screenshot shows the XC2 software interface with the following details:

- Window Title:** XC2 Software - BFP : City of Snoqualamish, WA: * BFP Assembly: 1 of 99 Records : Multi-Line
- Search Criteria:** Find: Equipment Serial Num 2001033
- Table Columns:** #, Assy ID, Facility Name, Last Status, Addr (#), Street, Next Test, Last Test, Serial Num, Mfr
- Table Data:**

#	Assy ID	Facility Name	Last Status	Addr (#)	Street	Next Test	Last Test	Serial Num	Mfr
1	2001033	A Flag House	PASS	1583	Kim	5/25/2015	4/2014	2001033	FEBCO
- Navigation Menu:** Includes Facility List, BFP Assembly List (highlighted with a red box and arrow), Tester List, Company List, BFP History, Survey History, Notice Setup, Send Annual Notices, Automatic Reminders, Compliance Report, Administrator Setup, and Lookup/Setup Lists.
- Buttons:** Add, Delete, Find, Sort, Show All, Export, Saved Search, Report, Send Notice, Enter Survey, Enter Test*, Exit XC2.

Notes:

Edit Assembly Information

The assembly information is located on the top right corner of the screen

click into the field that you would like to edit.

click save when you are done

The screenshot shows the 'XC2 Software' interface for editing backflow assembly information. The window title is 'XC2 Software - BFP : A Flag House : Location ID: : RP : Facility ID: 309 : 1 of 1 Selected'. The interface is divided into several sections:

- Facility Address Info:** Includes fields for Facility Name (A Flag House), Service Address (1583 W Kim Rd), City (Snoqualamish), State (WA), and Zip (98215).
- Facility Contact Info:** Includes Contact Name (Conrad), Position, Phone ((696) 236-3933), and Last (Hughes).
- Location and Meter Info:** Includes Location ID, Meter Acct Num (9315-000), Meter # (99999999), and Service Type (Washer, Pressure).
- Assembly Details (highlighted in purple):** Includes Type (RP), Size (3"), Mfr (Febco), Model (880V-Vuvd), Serial Num (2001033), Status (Installed), Next Test Due (05/25/2015), Frequency (12 Months), Last/Dflr Tester (Vincente Perry), Last Test Date (08/14/2014), and Protection Type (Isolation).

A purple arrow points from the 'Notes' section to the 'Assembly Details' section. The bottom of the window features a toolbar with buttons for 'Pictures/Site Map', 'Google Maps', 'GPS Info', 'Meter Info', 'New BFP Record', 'Search', 'Report/Print', 'Cancel', and 'Save'.

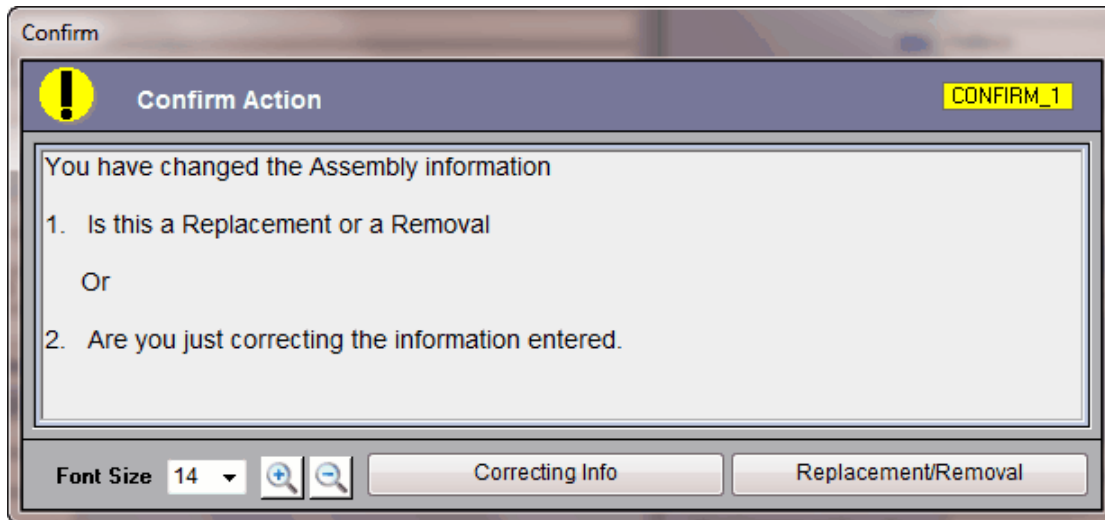
Notes:

Confirm

if you changed information in the backflow assembly record that is related to the type of device that is installed. This alert will appear.

If you are correcting information Click Correcting

If this is a replacement or a removal click Replacement/Removal

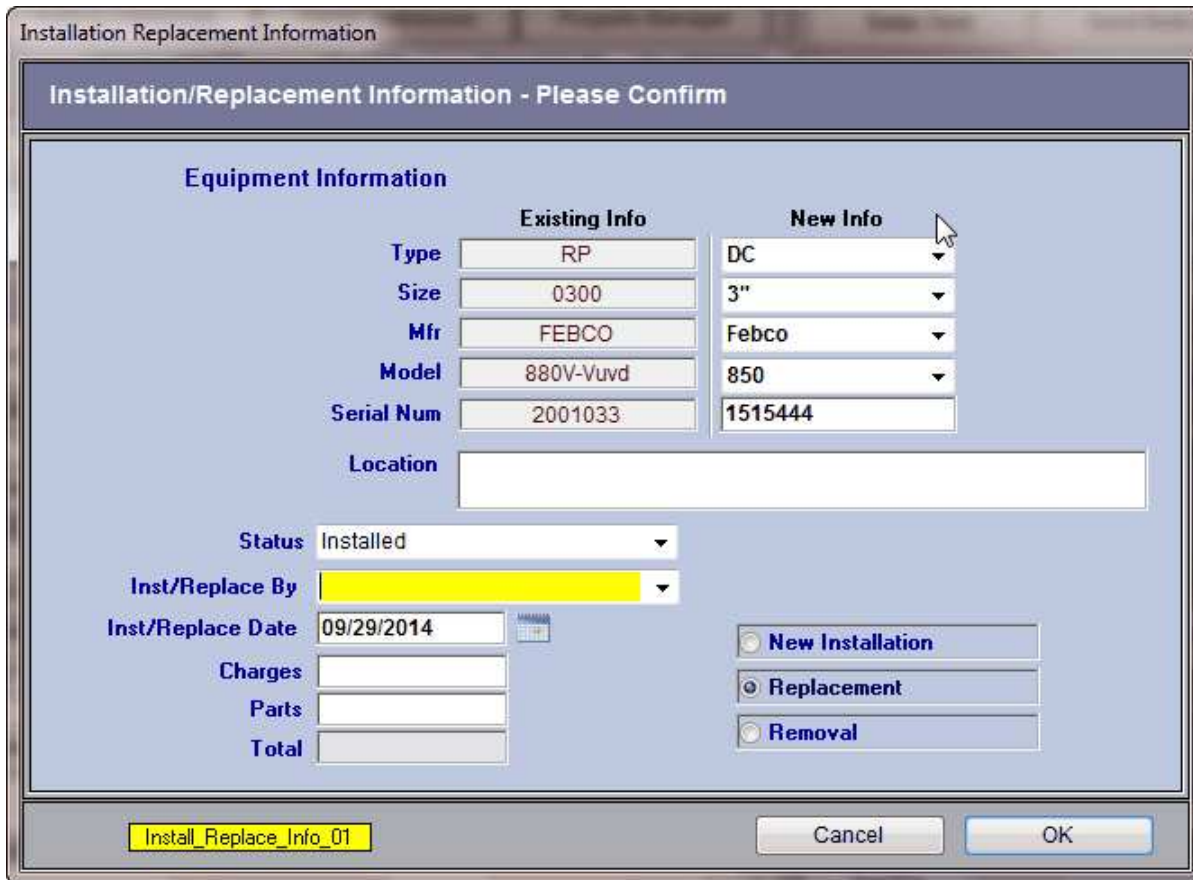


Notes:

If this is a Replacement or Removal

if it is a replacement or a removal confirm all information then click Ok to save

You have now edited your assembly information



The dialog box is titled "Installation Replacement Information" and contains a sub-header "Installation/Replacement Information - Please Confirm". It is divided into several sections:

- Equipment Information:** A table with two columns: "Existing Info" and "New Info".

	Existing Info	New Info
Type	RP	DC
Size	0300	3"
Mfr	FEBCO	Febco
Model	880V-Vuvd	850
Serial Num	2001033	1515444
- Location:** A text input field.
- Status:** A dropdown menu set to "Installed".
- Inst/Replace By:** A dropdown menu with a yellow highlight.
- Inst/Replace Date:** A date field set to "09/29/2014" with a calendar icon.
- Charges, Parts, Total:** Three empty text input fields.
- Radio Buttons:** Three radio buttons labeled "New Installation", "Replacement" (which is selected), and "Removal".
- Buttons:** "Install_Replace_Info_01" (highlighted in yellow), "Cancel", and "OK".

Notes:



Adding Pictures To Backflow Records

KB Asset ID: 3539

You can store digital images or documents inside an XC2 Backflow record.

Open an Assembly Record

Click the button

Pictures/Site Map

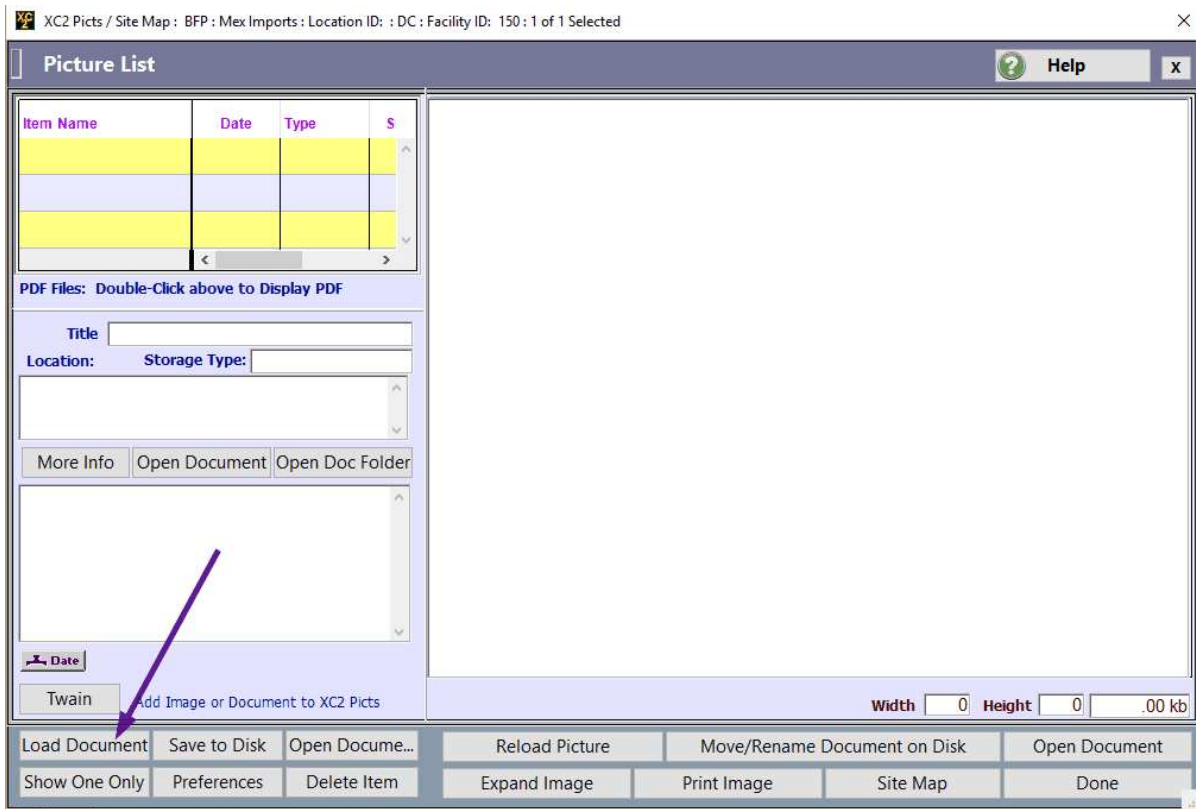
XC2 Software - BFP : Mex Imports : Location ID: : DC : Facility ID: 150 : 1 of 1 Selected

Acct/Address Info	History	Comments	Custom Fields
<p>Service Address Info Mailing Addresses Owner Addresses Property Manager [r]</p> <p>Facility Address Info XC2 Facility ID No: 150 Assembly ID No: 2000617</p> <p>Facility Name Mex Imports</p> <p>Facility Name 2</p> <p>Service Addr. 6471 S Chant CT</p> <p>Addr. 2</p> <p>City ST Zip Snoqualamish State WA Zip 98215</p> <p>Addr. Unit</p> <p>Facility Contact Info</p> <p>Contact Name Felton Last Torres</p> <p>Position Cell (696) 234-6254</p> <p>Phone (696) 234-6148 Ext. #2 (696) 234-6254</p> <p>E-Mail Address</p> <p>H2O_System Lennon River Water</p>			<p>Enter Test Send Notice Work Order</p> <p>Type DC Assembly List</p> <p>Size 1" By Pass</p> <p>Mfr Ames No Images</p> <p>Model 2000-DCA No Site Map</p> <p>Serial Num 545484</p> <p>Status Installed Cnt. Y</p> <p>Next Test Due 02/28/2018 Mo. 2</p> <p>Frequency 12 Months</p> <p>Last/Dflt Tester Vincente Perry View</p> <p>Last Test Date 01/03/2017 FAIL/PASS</p> <p>Test Form Print Date</p> <p>Inst/Replace By Glen Collins</p> <p>Install Date 01/06/2008 Abv. Grade 0</p> <p>Install Due</p> <p>Replacement Due Date</p> <p>Inst/Replace Date 12/29/2016 Replace</p> <p>Permit Num</p> <p>Schedule Code 12-Dec</p> <p>Protection Type Isolation</p> <p><input type="checkbox"/> Inactive</p> <p><input type="checkbox"/> Back Pressure</p> <p><input type="checkbox"/> Cont. Pressure</p> <p><input type="checkbox"/> Back Siphonage</p> <p><input type="checkbox"/> Improp. Appl</p> <p><input type="checkbox"/> Improp. Install</p>
<p>Location ID</p> <p>Meter Acct Num 7280-000 Old Customer Num</p> <p>Meter # UD Date 5</p> <p>Sz UD Date 6</p> <p>Service Type Commercial Haz. Level</p> <p>Hazard Type Hydraulic Equipment</p> <p>Equip Location</p> <p><input checked="" type="checkbox"/> Show Minimum Fields</p>			
<p><input checked="" type="checkbox"/> Facility Area No Facility Areas Entered Pressure Zone</p> <p>Location Floor Location Room</p> <p>Hazard Contaminant Flow GPM 0</p> <p>Equipment Fixture Type Line PSI 0</p>			

Toolbar: Pictures/Site M... Google Ma... GPS Info Meter Info New BFP Record Search Report/Print Cancel Save

Notes:

Load Document

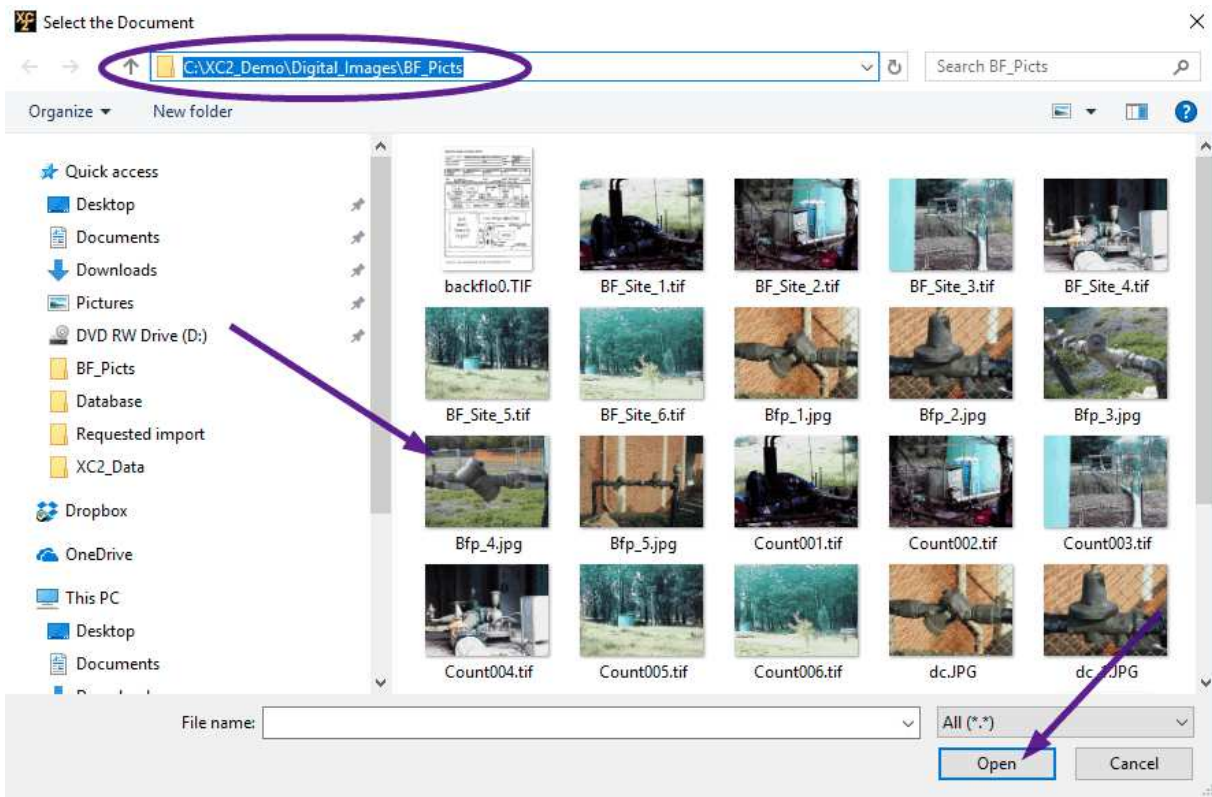


Notes:

Navigate to where your image is stored

When the windows explorer window opens.

- Navigate to where image is located
- Highlight file
- Click Open

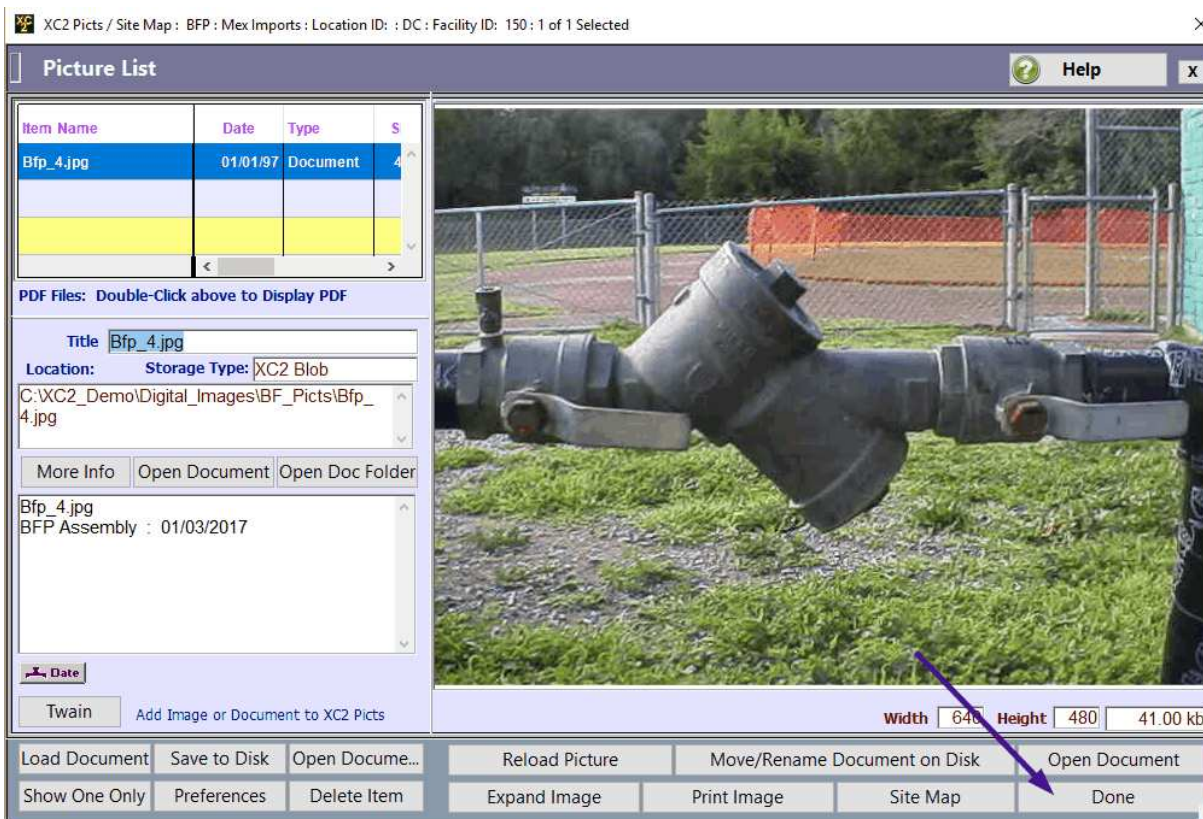


Notes:

Click Done or add additional images

Click Done if you are finished

Click the Load Document if there are additional images to load



Notes:



XC2 Software Knowledge Base



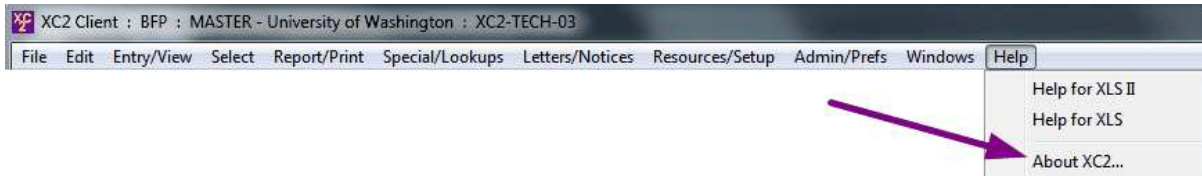
How To Update Backflow Models List

KB Asset ID: 1010

How to run the XC2 update of the backflow models list.

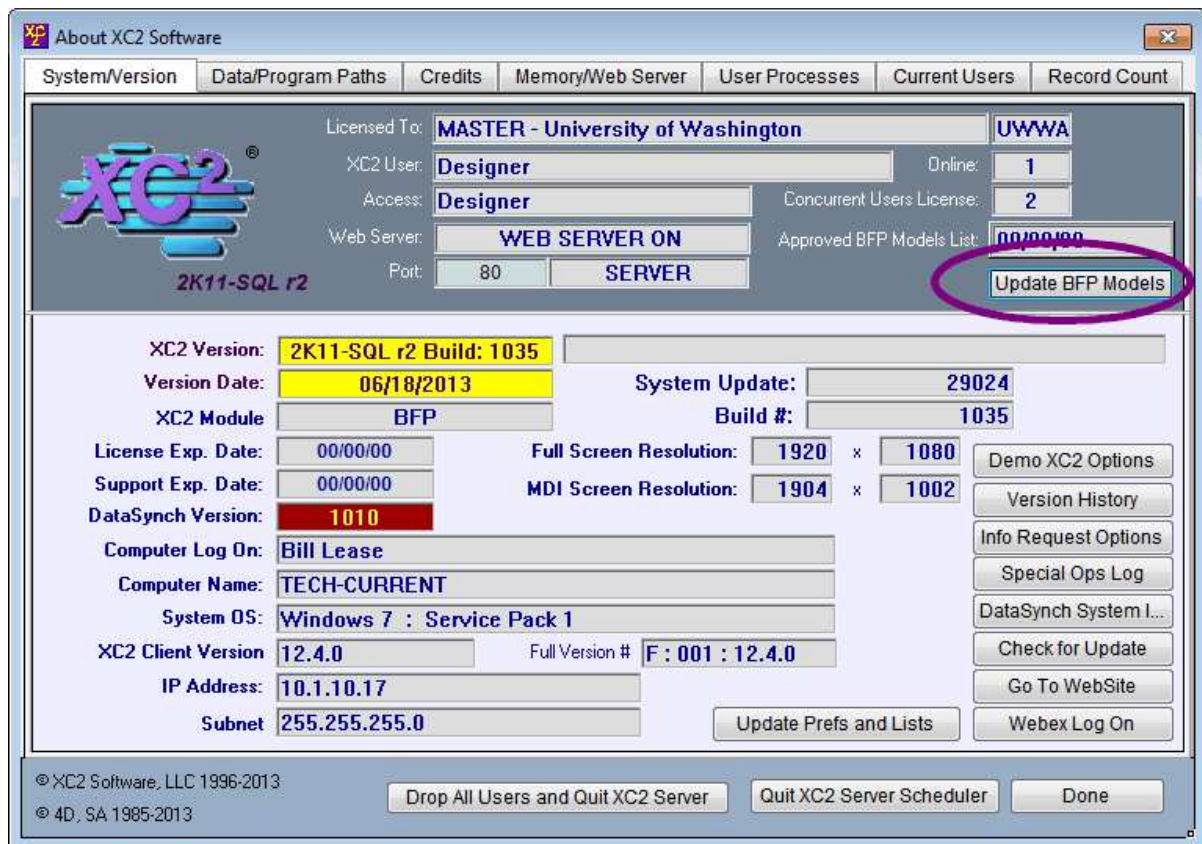
Quickly Update Your Backflow Models List

- Click the Help menu located at the top of your XC2 window.



About XC2 Software Page

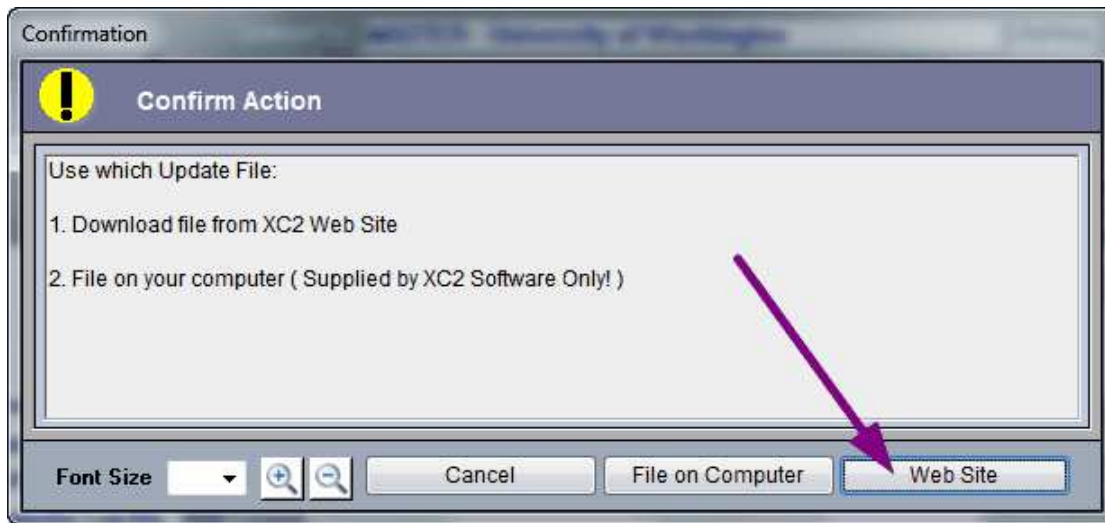
- Click Update BFP Models button



Notes:

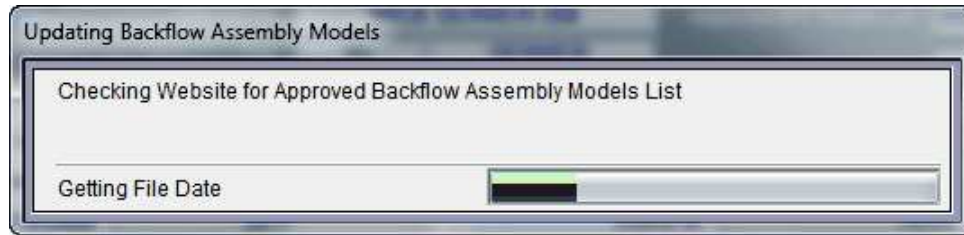
Update Options Page

- Click the Web Site button



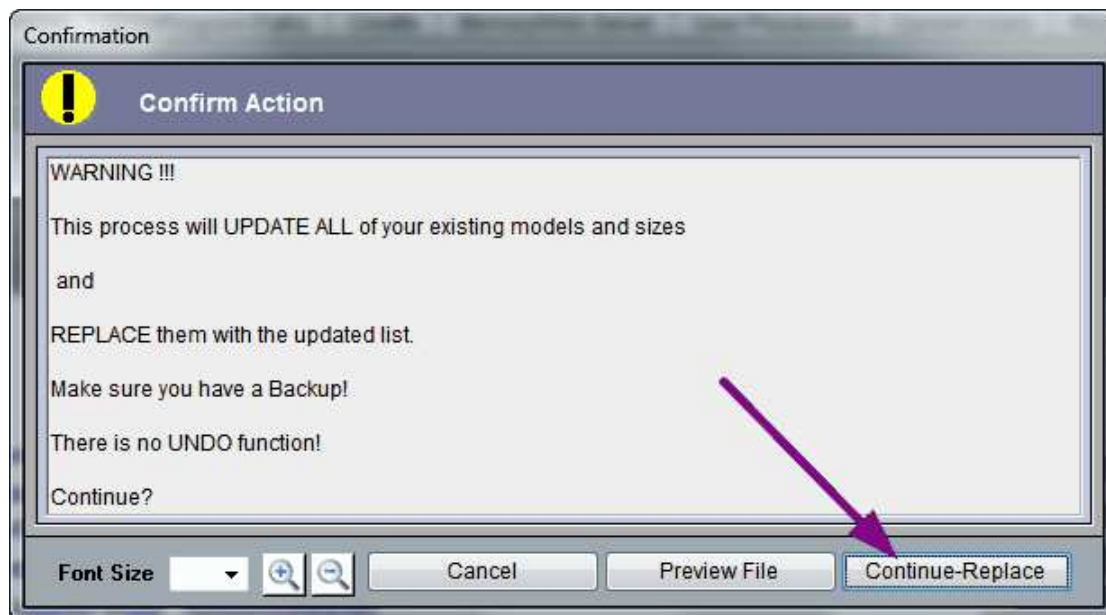
Notes:

Update Processs Begins



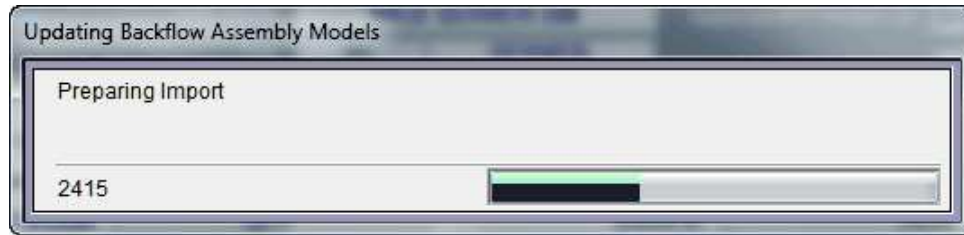
Continue

- Click Continue Replace



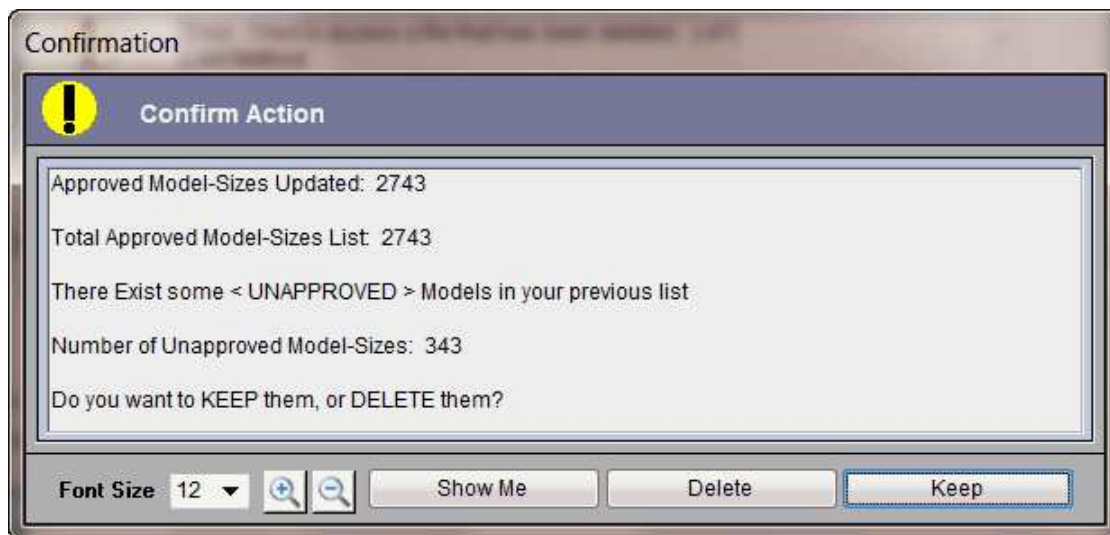
Notes:

Preparing to Import



Final Results Options

You can select whether to keep any unapproved assembly models or delete.



Notes:

Your New Updated Models Are Now Available

XC2 Software - BFP : * Equipment Model: 886 of 886 Records : Multi-Line

#	Manufacturer	Type	Model	Mod ID	Mfg ID	Type ID	*
1	AMES	AVB	A100-VUH	103967	37	23	
2	AMES	DC	2000-DC	103971	37	18	
3	AMES	DC	2000-DCA	103972	37	18	
4	AMES	DC	2000-G-DC	103973	37	18	
5	AMES	DC	2000-G-DCA	103974	37	18	
6	AMES	DC	2000B	103975	37	18	
7	AMES	DC	2000B-VU	103976	37	18	
8	AMES	DC	2000B-FP	103977	37	18	
9	AMES	DC	2000BM3	103978	37	18	
10	AMES	DC	2000BM3-VU	103979	37	18	
11	AMES	DC	2000BM3-FP	103980	37	18	
12	AMES	DC	2000CIV	103981	37	18	
13	AMES	DC	2000CIV-VU	103982	37	18	
14	AMES	DC	2000SE	103983	37	18	
15	AMES	DC	2000SS	103984	37	18	

?

Notes:



XC2 User Manual

Test Company Records

- **Test Company Screen Overview**
- **Adding a New Test Company Record**
- **Editing Existing Test Company Records**
- **How to Make a Test Company Inactive**
- **How to Change Test Company Type**



XC2 Software Knowledge Base



Test Company Screen

KB Asset ID: 3603

This page is a over view of a Backflow Assembly Testing Company Screen.

XC2's Test Company Screen

Here is XC2's Test Company Screen. This page is an overview on how to find your Test Company list and the individual parts of a company record.

XC2 Software - BFP: Tester Company: YOU SAID IT TESTING: 22 of 29 Selected: WEB SERVER ON: 80: WEB BFP Test

Company Info Comments/User Defined Fields Additional Licenses Web Access Info Expand Items

Tester Company Include on Public List Inactive Sys ID: 10000002 COMPANY_06.1

Company Information License/Registration/Certification Update in List

Company Name: YOU SAID IT TESTING
 Address 1: 3469 YOUNDER
 Address 2:
 City/St/Zip: OREGON CITY OR 97045
 Contact Name 1: NATHAN WIZZING
 Company Phone: (503) 555-6962 FAX:
 Contact Name 2: SEYMOUR Ph #2:
 Contact Email:
 UD 11: Mail Same as Company

License Agency: AAA123
 Bus. License: ZYX 435 Lic. Amt: 0
 License Date: 01/31/2017
 Lic. Exp Date: 04/26/2012

Reg Agency:
 Reg Num:
 Reg Date:
 Exp Date:
 Reg Fee: 0

Permit Agency:
 User Defined 18: UD CB 01
 UD Real 04: 0 UD CB 02
 Permit Issue Date:
 Permit Exp Date:
 UD CB 03
 UD CB 04

Certification Agency:
 UD 20:
 Cert Date:
 Exp Date:
 UD 01:
 UD 02:
 Cert Fee: 0

Additional Licenses
 Insurance Information
 XC2 Picts

BFP Testers List

BFP Testers List Test Kits List Web Users Test History Associated Facility List Notice History Permit/Certification History

#	Last Name	First Name	Certif Num	Exp Date	Last Test	Phone	RME	Email	Inactive
1	GRAY	SALVADOR	5507	01/31/2020	06/02/2016	(696) 239-0602		ian.saxton@xc2software.com	-
2	KIDD	MIKE	696969	01/31/2020	01/11/2015	(503) 555-6962			-

XC2 Picts # Items: 2 Add Tester/Inspector Delete Tester/Inspec... View Tester/Inspector Exclude Inactive

Company Type System Access Module Mgr New Search Print < < > > Cancel Save

Notes:

Getting to your list of Companies.

Your list of companies can be located on the main screen under **Favorite Tasks**

Click Company List to view list of companies

Double click company to open

The screenshot shows the XC2 Software interface. At the top, the title bar reads "XC2 Software - BFP : City of Snoqualamish, WA: * Tester Company: 29 of 0 Records : Multi-Line : WEB SERVER ON : 80 : WEB BFP Test". Below the title bar is a menu bar with options: "User Options", "Add", "Delete", "Find", "Sort", "Show All", "Export", "Saved Search", and "Report". A toolbar below the menu bar includes icons for "Add", "Delete", "Find", "Sort", "Show All", "Export", "Saved Search", and "Report".

The main window is divided into several sections. On the left, there is a "Run Selected Export" section with options: "Create New Export", "Scheduled Exports", and "Export Current List View". Below this is a "Favorite Tasks" section with a list of tasks: "Facility List", "BFP Assembly List", "BFP Testers List", "Tester Company List" (highlighted with a purple box and an arrow), "Test Kits List", "Test History", and "Facility Survey History List". At the bottom left of the main window is a "Customize Favorite Tasks" section.

The central part of the window displays a table of company records. The table has columns: "#", "Company Name", "Contact Name 1", "Company Phone 1", and "Bu". The records are as follows:

#	Company Name	Contact Name 1	Company Phone 1	Bu
	WILLIS TESTING SERVICES	GARY COLEMAN	(503) 555-1818	bb4b
	ZAGNUTZ TESTING SYSTEM	HORACE ZAGNUTZ	(503) 555-2368	ABC1
	CITY OF SNOQUALAMISH	RALPH GOITERMAN	(503) 555-2587	0123
	METRO TRANSIT	RALPH	(503) 555-5599	1111
	TULARE COUNTY ROADHOUSE	SAM IMANSON	(503) 555-6568	5464
	CALUMET TESTING	TIM	(503) 555-6587	
	YOU SAID IT TESTING	NATHAN WIZZING	(503) 555-6962	ZYX 4
	MAXI FLOW NORTH WEST	MALCOLM SINISTRESTIE	(503) 555-6968	ABC3
	ZAGNUTZ VALVE EXCERSIZING	HORACE	(503) 555-6968	0698
	ICABODS BACKFLOW 2	ICABOD SELLWOOD	(503) 555-6983	QWI7
	HOME TOWN BACKFLOW	JASMINE MARIE OLLOFFANDER	(555) 555-5555	1246
	BIG HORN		(696) 239-0602	
	JIMBOB'S BETTER BACKFLOW	AMOS BELL	(696) 240-6471	QWE:
	FACE FIBE TESTING COMPANY	JACOB MALTUSKI	(852) 888-0707	1578

At the bottom of the window, there is a "Selection ..." dropdown, a "Filter On" checkbox, and a "Exclude Inactive Tester Company Records" checkbox. On the right side, there are buttons for "Send Notice", "Enter Survey", "Enter Test", and "Exit XC2".

Notes:

Company Info

The Default Screen that will open is the Company Info Screen

This is where most used page in a company record.

The top left quadrant provides a space to enter company address information.

- 1) Business Name
- 2) Address
- C) Contact information

The screenshot shows the 'Company Info' screen for a company named 'YOU SAID IT TESTING'. The interface includes several tabs at the top: 'Company Info', 'Comments/User Defined Fields', 'Additional Licenses', 'Web Access Info', and 'Expand Items'. The 'Company Info' tab is active, showing a form with the following sections:

- Company Information:** Fields for Company Name, Address 1, Address 2, City/St/Zip, Contact Name 1, Company Phone, Contact Name 2, Contact Email, and UD 11. A checkbox for 'Mail Same as Company' is checked.
- License/Registration/Certification:** Fields for License Agency, Bus. License, License Date, Lic. Exp Date, Reg Agency, Reg Num, Reg Date, Exp Date, Certification Agency, UD 20, Cert Date, Exp Date, UD 01, and UD 02. There are also fields for Lic. Amt and Reg Fee.
- Permit Agency:** Fields for Permit Agency, User Defined 18, UD Real 04, Permit Issue Date, and Permit Exp Date. There are checkboxes for UD CB 01, UD CB 02, UD CB 03, and UD CB 04.

Below the form is a 'BFP Testers List' table with columns: #, Last Name, First Name, Certif Num, Exp Date, Last Test, Phone, RME, Email, and Inactive. The table contains two entries:

#	Last Name	First Name	Certif Num	Exp Date	Last Test	Phone	RME	Email	Inactive
1	GRAY	SALVADOR	5507	01/31/2020	06/02/2016	(696) 239-0602		ian.saxton@xc2software.com	-
2	KIDD	MIKE	696969	01/31/2020	01/11/2015	(503) 555-6962			-

At the bottom of the screen, there are buttons for 'Add Tester/Inspector', 'Delete Tester/Inspector', 'View Tester/Inspector', and 'Exclude Inactive'. The bottom navigation bar includes 'Company Type', 'System Access', 'Module Mgr', 'New', 'Search', 'Print', 'Cancel', and 'Save'.

Notes:

License/Registration

The right portion of the Company Info screen is the License information for the Company.

Some people use this and some people do not.

It is up to you

The screenshot shows the 'Company Info' screen for 'YOU SAID IT TESTING'. The 'License/Registration/Certification' section is highlighted with a purple box. It contains fields for License Agency (AAA123), Bus. License (ZYX 435), License Date (01/31/2017), Lic. Exp Date (04/26/2012), Reg Agency, Reg Num, Reg Date, Exp Date, Certification Agency, and Cert Date. There are also buttons for 'Additional Licenses', 'Insurance Information', and 'XC2 Picts'. Below this is the 'BFP Testers List' table.

#	Last Name	First Name	Certif Num	Exp Date	Last Test	Phone	RME	Email	Inactive
1	GRAY	SALVADOR	5507	01/31/2020	06/02/2016	(696) 239-0602		ian.saxton@xc2software.com	-
2	KIDD	MIKE	696969	01/31/2020	01/11/2015	(503) 555-6962			-

Notes:

User Defined Fields

This area is our User Defined Fields Area.

These fields can be renamed to whatever you need.

This screen has permit info added but it can be anything that you would like

The screenshot shows the 'Tester Company' screen in the XC2 Software. The window title is 'XC2 Software - BFP : Tester Company : YOU SAID IT TESTING : 22 of 29 Selected : WEB SERVER ON : 80 : WEB BFP Test'. The interface is divided into several sections:

- Company Info:** Includes 'Include on Public List' (checked), 'Inactive' (unchecked), 'Sys ID: 1000002', and 'COMPANY_001'.
- Company Information:** Fields for Company Name (YOU SAID IT TESTING), Address 1 (3469 YOUNDER), Address 2, City/St/Zip (OREGON CITY OR 97045), Contact Name 1 (NATHAN WIZZING), Company Phone ((503) 555-6962), Contact Name 2 (SEYMOUR), and Contact Email. There is also a 'Mail Same as Company' checkbox.
- License/Registration/Certification:** Fields for License Agency (AAA123), Bus. License (ZYX 435), License Date (01/31/2017), Lic. Exp Date (04/26/2012), Lic. Amt (0), Reg Agency, Reg Num, Reg Date, Exp Date, Reg Fee (0), Certification Agency, UD 20, Cert Date, Cert Fee (0), UD 01, and UD 02.
- Permit Agency:** Fields for Permit Agency, User Defined 18, UD Real 04 (0), Permit Issue Date, Permit Exp Date, and checkboxes for UD CB 01, UD CB 02, UD CB 03, and UD CB 04.
- BFP Testers List:** A table with columns: #, Last Name, First Name, Certif Num, Exp Date, Last Test, Phone, RME, Email, and Inactive.

#	Last Name	First Name	Certif Num	Exp Date	Last Test	Phone	RME	Email	Inactive
1	GRAY	SALVADOR	5507	01/31/2020	06/02/2016	(696) 239-0602		ian.saxton@xc2software.com	-
2	KIDD	MIKE	696969	01/31/2020	01/11/2015	(503) 555-6962			-

At the bottom, there are navigation buttons: Company Type, System Access, Module Mgr, New, Search, Print, Cancel, and Save. A status bar shows '# Items: 2' and buttons for 'Add Tester/Inspector', 'Delete Tester/Inspec...', and 'View Tester/Inspector'.

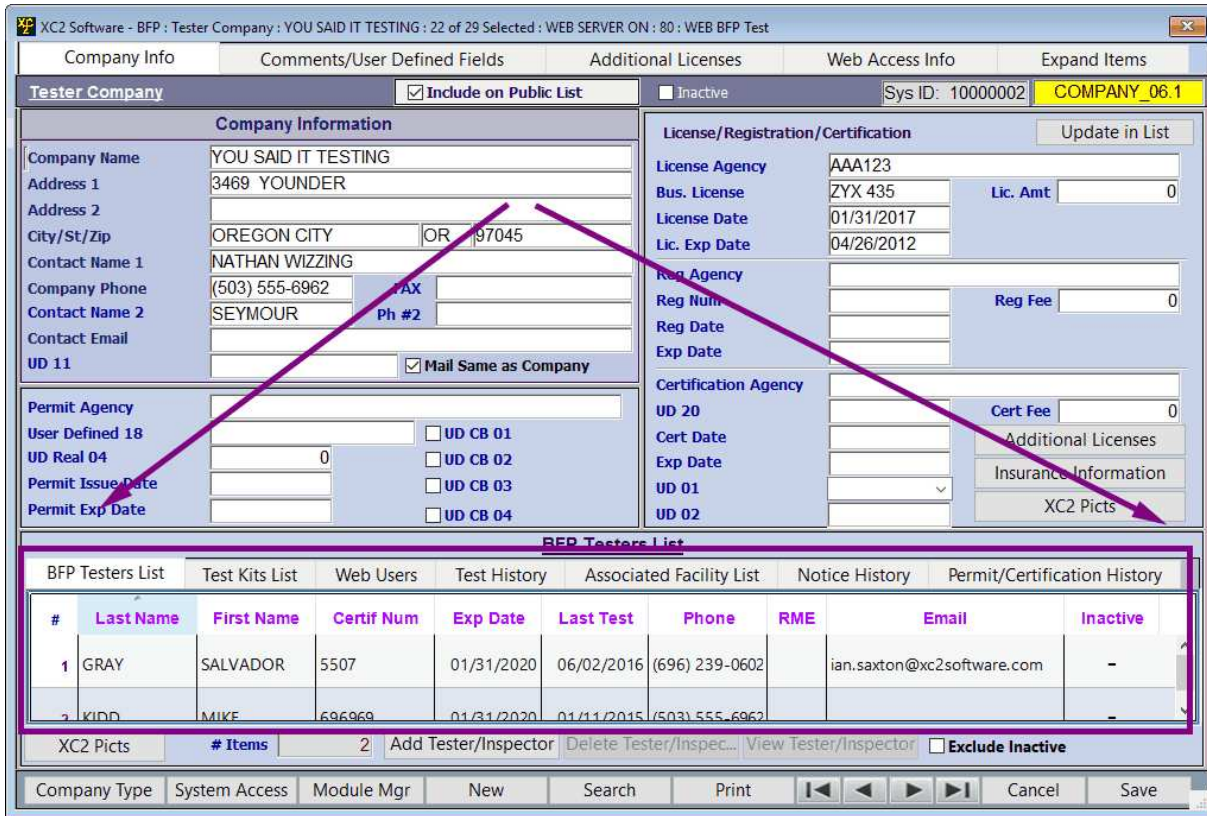
Notes:

Associated Records Area

The Bottom Portion is your Associated Records Area.

Associated Records for a company includes

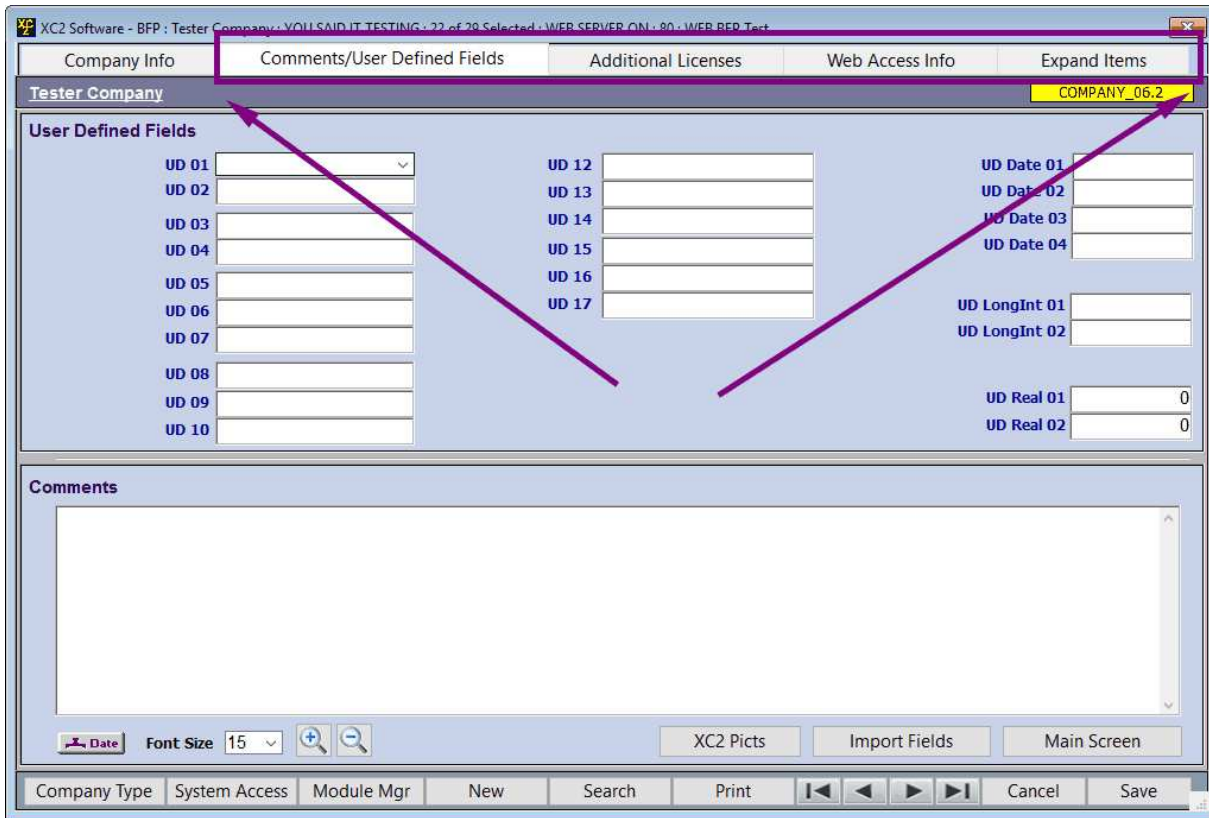
- 1) Testers List
- 2) Test Kit List
- 3) Web Users (optional)
- 4) Test History
- 5) Associated Facilities (Assigned Facilities)
- 6) Notice History
- 7) Permit Certificate History



Notes:

There are a few other Tabbed Areas available on the tester company screen

- 1) More Custom Fields
- 2) More Licensing Areas
- 3) Web Access Info (optional)
- 4) Expand Items (Detailed Company information).



Notes:



XC2 Software Knowledge Base



How to Create a New Company Record

KB Asset ID: 2599

Describes how to create a new company record

[Click on Company List](#)

Click on the Company List then click Add.

The screenshot shows the XC2 Software interface for managing company records. The title bar indicates 'XC2 Software - BFP : * Tester Company: 10 of 12 Records : Multi-Line'. The top toolbar contains buttons for 'Add', 'Delete', 'Find', 'Sort', 'Show All', 'Export', 'Saved Search', and 'Report'. The 'Add' button is highlighted with a red box. The left sidebar contains a 'Company List' menu item, also highlighted with a red box. The main window displays a table of 10 records with the following data:

#	Company Name	Contact Name 1	Company Phone 1	Bus. License	Lic. Exp Date	Ins. Ex
1	Stevenson Backflow and Plumt	Bjorn Stevenson	(206) 555-4789	69 Cu469	08/14/2015	09/2
2	Metro Transit		(503) 555-1111			
3	Home Town Backflow	Jasmine Marie Oloffand	(503) 555-1469	12469 WA	09/04/2010	11/0
4	Zagnutz Testing System	Horace Zagnutz	(503) 555-2368	Abc123	02/21/2013	11/1
5	City of Snoqualamish	Ralph Goiterman	(503) 555-2587	0123456	10/09/2011	05/1
6	Metro Transit	Ralph	(503) 555-5599	1111111	04/03/2012	
7	Sams Backflow	Sam Imanson	(503) 555-6568	5464	02/20/2013	02/2
8	Whistler Testing Services	Nathan Wizzing	(503) 555-6962	Zyx 435	04/26/2012	
9	Icabods Backflow	Icabod Sellwood	(503) 555-6983	Qwi7769	05/27/2010	
10	Jimbob's Better Backflow	Amos Bell	(696) 240-6471	Qwest	08/15/2010	11/2

Notes:

Enter Company Information

Enter basic company information

The screenshot shows the 'XC2 Software - BFP : New Record For : Tester Company' window. The 'Company Information' section is highlighted with a purple box. The 'BFP Testers List' table is empty, and a purple arrow points from it to the 'Company Information' section.

Company Information

Company Name: Phils
 Address 1: 20626 Backflow
 Address 2:
 City/St/Zip: Milton NY 12547
 Contact Name 1:
 Company Phone: (415) 256-3665 FAX: (415) 258-7774
 Contact Name 2:
 Ph #2:
 Company Email: philis@backflow.com
 UD 11:
 Mail Same as Company

License/Registration/Certification Information

License Agency:
 Bus. License:
 Lic. Amt: \$0.00
 License Date: / /
 Lic. Exp Date: / /
 Reg Agency:
 Reg Num:
 Reg Date: / /
 Exp Date: / /
 Reg Fee: \$0.00
 Certification Agency:
 UD 20:
 Cert Date: / /
 Exp Date: / /
 Cert Fee: \$0.00

BFP Testers List

#	Last Name	First Name	Certif Num	Exp Date	Last Test	Phone	RME	Email

Items: 0
 Add Tester/Inspector
 Delete Tester/Inspector
 View Tester/Inspector

Company Type System Access Module Manager New Search Print Cancel Save

Notes:

Enter License, Registration and Certification Info

Enter all license registration and certification info that you may have

XC2 Software - BFP : New Record For : Tester Company

Company Info | Comments/User Defined Fields | Additional Licenses | Web Access Info | Expand Items

Tester Company Include on Public List Inactive Sys ID: 10000040 COMPANY_06.1

Company Information

Company Name: Phils
 Address 1: 20626 Backflow
 Address 2:
 City/St/Zip: Milton NY 12547
 Contact Name 1:
 Company Phone: (415) 256-3665 FAX: (415) 258-7774
 Contact Name 2:
 Ph #2:
 Company Email: phil@backflow.com
 UD 11: Mail Same as Company

Permit Information UD CB 04

Permit Agency:
 User Defined 18:
 UD Real 04: \$0.00
 Permit Issue Date: / / UD CB 01 UD CB 03
 Permit Exp Date: / / UD CB 02

License/Registration/Certification Information Update in List

License Agency Bilbo Licenses
 Bus. License: 22525 Lic. Amt: \$1,000.00
 License Date: 09/26/2014
 Lic. Exp Date: 06/22/2017

Reg Agency Bilbo Registration
 Reg Num: 2520552 Reg Fee: \$500.00
 Reg Date: 06/22/2017
 Exp Date: / /

Certification Agency Bilbo's Certification
 Cert Num: 8585855 Cert Fee: \$250.00
 Cert Date: 09/26/2014
 Exp Date: 06/22/2017

Additional Licenses Insurance Information

BFP Testers List

#	Last Name	First Name	Certif Num	Exp Date	Last Test	Phone	RME	Email

Items: 0 Add Tester/Inspector Delete Tester/Inspector View Tester/Inspector

Company Type System Access Module Manager **New** Search Print Cancel Save

Notes:

Permit Information

Enter any Permit information that you may have

XC2 Software - BFP : New Record For : Tester Company

Company Info | Comments/User Defined Fields | Additional Licenses | Web Access Info | Expand Items

Tester Company Include on Public List Inactive Sys ID: 10000040 COMPANY_06.1

Company Information

Company Name: Phils
 Address 1: 20626 Backflow
 Address 2:
 City/St/Zip: Milton NY 12547
 Contact Name 1:
 Company Phone: (415) 256-3665 FAX: (415) 258-7774
 Contact Name 2:
 Ph #2:
 Company Email: phil@backflow.com
 UD 11: Mail Same as Company

License/Registration/Certification Information Update in List

License Agency: Bilbo Licenses
 Bus. License: 22525 Lic. Amt: \$1,000.00
 License Date: 09/26/2014
 Lic. Exp Date: 06/22/2017

Reg Agency: Bilbo Registration
 Reg Num: 2520552 Reg Fee: \$500.00
 Reg Date: 06/22/2017
 Exp Date: / /

Certification Agency: Bilbo's Certification
 Cert Num: 8585855 Cert Fee: \$250.00
 Cert Date: 09/26/2014
 Exp Date: 06/22/2017

Additional Licenses | Insurance Information

Permit Information UD CB 04

Permit Agency:
 User Defined 18:
 UD Real 04: \$0.00
 Permit Issue Date: / / UD CB 01 UD CB 03
 Permit Exp Date: / / UD CB 02

BFP Testers List

#	Last Name	First Name	Certif Num	Exp Date	Last Test	Phone	RME	Email

Items: 0 Add Tester/Inspector Delete Tester/Inspector View Tester/Inspector

Company Type | System Access | Module Manager | **New** | Search | Print | << < > >> | Cancel | Save

Notes:

Review

Lastly you want to review all information add any testers that you would like to be included.

Are there any Testers that need to be added?

Do you need to add test kits?

When you are done click save

Notes:



XC2 Software Knowledge Base



How to Edit a Testing Company Record

KB Asset ID: 3604

This page describes how to edit an existing testing company record.

Search For Company Record

From The Main Screen Select your company list and search for the company that you would like to edit

Double click the record to open

The screenshot shows the XC2 software interface with the following details:

- Window Title:** XC2 Software - BFP : City of Snoqualamish, WA: * Tester Company: 1 of 17 Records : Multi-Line : WEB SERVER ON : 80 : WEB BFP Test
- Search Criteria:** Find: Company Name, flim
- Results Table:**

#	Company Name	Contact Name 1	Company Phone 1	Bus
	FLIM FLAM TESTING	MR. FLIM	(225) 456-7894	
- Left Sidebar (Favorite Tasks):**
 - Facility List
 - BFP Assembly List
 - BFP Testers List
 - Tester Company List** (highlighted)
 - Test Kits List
 - Test History
- Bottom Bar:** Selection ... Filter On Exclude Inactive Tester Company Records

Notes:

Highlight the field that you would like to Edit

The screenshot shows the 'Tester Company' record for 'FLIM FLAM TESTING'. The 'Contact Name 1' field, 'MR. FLIM', is highlighted in yellow and outlined in purple. The interface includes sections for Company Information, License/Registration/Certification, and a BFP Testers List table.

Company Information

Company Name: FLIM FLAM TESTING
 Address 1: 2222 BOGUS
 Address 2:
 City/St/Zip: FAIREAX CA 94930
 Contact Name 1: MR. FLIM
 Company Phone: (225) 456-7894 FAX:
 Contact Name 2:
 Contact Email: flim@flam.com
 UD 11:
 Mail Same as Company

License/Registration/Certification

License Agency:
 Bus. License:
 License Date:
 Lic. Exp Date:
 Lic. Amt: 0
 Reg Agency:
 Reg Num:
 Reg Date:
 Exp Date:
 Reg Fee: 0
 Certification Agency:
 UD 20:
 Cert Date:
 Exp Date:
 UD 01:
 UD 02:
 Cert Fee: 0
 Additional Licenses
 Insurance Information
 XC2 Picts

BFP Testers List

#	Last Name	First Name	Certif Num	Exp Date	Last Test	Phone	RME	Email	Inactive
1	EASTLAND	BOB	558	03/10/2019	05/06/2016	(225) 456-7894		flim@flam.com	-
2	BOB	EASTLAND	22365	03/10/2019	06/02/2016	(225) 456-7894		flim@flam.com	-

XC2 Picts # Items 2 Add Tester/Inspector Delete Tester/Inspec... View Tester/Inspector Exclude Inactive

Company Type System Access Module Mgr New Search Print << >> Cancel Save

Notes:

Type the Changes in the field

XC2 Software - BFP : Tester Company : FLIM FLAM TESTING : 1 of 1 Selected : WEB SERVER ON : 80 : WEB BFP Test

Company Info Comments/User Defined Fields Additional Licenses Web Access Info Expand Items

Tester Company Include on Public List Inactive Sys ID: 10000041 COMPANY_06.1

Company Information

Company Name: FLIM FLAM TESTING
 Address 1: 2222 BOGUS
 Address 2:
 City/St/Zip: FAIRFAX CA 94930
 Contact Name 1: Mrs. F
 Company Phone: (225) 456-7894 FAX:
 Contact Name 2: Ph. #2:
 Contact Email: flim@flam.com
 UD 11: Mail Same as Company

Permit Agency:
 User Defined 18: UD CB 01
 UD Real 04: 0 UD CB 02
 Permit Issue Date: UD CB 03
 Permit Exp Date: UD CB 04

License/Registration/Certification Update in List

License Agency:
 Bus. License: Lic. Amt: 0
 License Date:
 Lic. Exp Date:
 Reg Agency:
 Reg Num: Reg Fee: 0
 Reg Date:
 Exp Date:
 Certification Agency:
 UD 20: Cert Fee: 0
 Cert Date: Additional Licenses
 Exp Date: Insurance Information
 UD 01: XC2 Picts
 UD 02:

BFP Testers List

BFP Testers List Test Kits List Web Users Test History Associated Facility List Notice History Permit/Certification History

#	Last Name	First Name	Certif Num	Exp Date	Last Test	Phone	RME	Email	Inactive
1	EASTLAND	BOB	558	03/10/2019	05/06/2016	(225) 456-7894		flim@flam.com	-
2	BOB	EASTLAND	22365	03/10/2019	06/02/2016	(225) 456-7894		flim@flam.com	-

XC2 Picts # Items: 2 Add Tester/Inspector Delete Tester/Inspec... View Tester/Inspector Exclude Inactive

Company Type System Access Module Mgr New Search Print << < > >> Cancel Save

Notes:

Click Save when you are Complete

XC2 Software - BFP : Tester Company : FLIM FLAM TESTING : 1 of 1 Selected : WEB SERVER ON : 80 : WEB BFP Test

Company Info Comments/User Defined Fields Additional Licenses Web Access Info Expand Items

Tester Company Include on Public List Inactive Sys ID: 10000041 COMPANY_06.1

Company Information

Company Name: FLIM FLAM TESTING
 Address 1: 2222 BOGUS
 Address 2:
 City/St/Zip: FAIRFAX CA 94930
 Contact Name 1: MRS. FLAM
 Company Phone: (225) 456-7894 FAX:
 Contact Name 2:
 Contact Email: flim@flam.com
 UD 11:
 Mail Same as Company

License/Registration/Certification Update in List

License Agency:
 Bus. License:
 License Date:
 Lic. Exp Date:
 Lic. Amt: 0

Reg Agency:
 Reg Num:
 Reg Date:
 Exp Date:
 Reg Fee: 0

Certification Agency:
 UD 20:
 Cert Date:
 Exp Date:
 UD 01:
 UD 02:
 Cert Fee: 0

Additional Licenses
 Insurance Information
 XC2 Picts

BFP Testers List

BFP Testers List Test Kits List Web Users Test History Associated Facility List Notice History Permit/Certification History

#	Last Name	First Name	Certif Num	Exp Date	Last Test	Phone	RME	Email	Inactive
1	EASTLAND	BOB	558	03/10/2019	05/06/2016	(225) 456-7894		flim@flam.com	-
2	BOB	EASTLAND	22365	03/10/2019	06/02/2016	(225) 456-7894		flim@flam.com	-

XC2 Picts # Items: 2 Add Tester/Inspector Delete Tester/Inspec... View Tester/Inspector Exclude Inactive

Company Type System Access Module Mgr New Search Print << < > >> Cancel **Save**

Notes:

Changes will be Complete

The screenshot displays the XC2 Software interface for managing testing company records. The main window title is "XC2 Software - BFP : City of Snoqualamish, WA: * Tester Company: 1 of 17 Records : Multi-Line : WEB SERVER ON : 80 : WEB BFP Test". The interface includes a menu bar with options: Add, Delete, Find, Sort, Show All, Export, Saved Search, and Report. Below the menu bar, there is a search bar with "Tester Company" and "1 of 17 Records" displayed, and a "Find:" field containing "Company Name" and a search term "flim".

The central part of the interface is a table with the following columns: #, Company Name, Contact Name 1, Company Phone 1, Bus. License, and Lic. Exp Date. The first row is highlighted in blue and contains the following data: # 1, Company Name FLIM FLAM TESTING, Contact Name 1 MR. FLIM, Company Phone 1 225) 456-7894, Bus. License, and Lic. Exp Date. A purple box highlights the "Contact Name 1" cell, and a purple arrow points to it from below.

On the left side, there is a sidebar with two main sections: "Run Selected Export" and "Favorite Tasks". The "Run Selected Export" section includes options for "Create New Export", "Scheduled Exports", and "Export Current List View". The "Favorite Tasks" section includes a list of tasks: Facility List, BFP Assembly List, BFP Testers List, Tester Company List (which is currently selected), Test Kits List, and Test History. Below the sidebar, there is a "Customize Favorite Tasks" section.

At the bottom of the window, there is a "Selection ..." dropdown menu, a "Filter On" checkbox, a checkbox for "Exclude Inactive Tester Company Records", and several buttons: "Send Notice", "Enter Survey", "Enter Test", and "Exit XC2".

Notes:



How to inactivate a company record in XC2 Backflow

KB Asset ID: 3064

This page describes how to inactivate company records in XC2 Backflow

Why Inactivate?

Inactivating records is a great alternative to deleting records because it allows you to exclude and hide records without losing information.

We **highly** recommend inactivating records rather than deleting records.

Search and Open a company record

The screenshot shows the XC2 Software interface with the following data in the main table:

#	Company Name	Contact Name 1	Company Phone 1	Bus. License	Lic. Exp Date	Ins
	Screwy Testing Company			Bogus		
	Tweeks Coffee			Shady	04/14/14	
	Stevenson Backflow and Plum	Bjorn Stevenson	(206) 555-4789	Cu469	08/14/15	
	Metro Transit		(503) 555-1111			
	Home Town Backflow	Jasmine Marie Oloffan	(503) 555-1469	12469 WA	09/04/10	
	Zagnutz Testing System	Horace Zagnutz	(503) 555-2368	Abc123	02/21/13	
	City of Snoqualamish	Ralph Goiterman	(503) 555-2587	0123456	10/09/11	
	Metro Transit	Ralph	(503) 555-5599	1111111	04/03/12	
	Tulare County Roadhouse	Sam Imanson	(503) 555-6568	5464	02/20/13	
	Whistler Testing Services	Nathan Wizzing	(503) 555-6962	Zyx 435	04/26/12	
	Icabods Backflow	Icabod Sellwood	(503) 555-6983	Qwi7769	05/27/10	
	Jimbo's Better Backflow	Amos Bell	(696) 240-6471	Qwest	08/15/10	

Notes:

Inactive Checkbox

The inactive checkbox is located at the top of the company record.

When checked, the company will be made inactive

The screenshot shows the 'Tester Company' record for 'Icabods Backflow'. At the top, there are tabs for 'Company Info', 'Comments/User Defined Fields', 'Additional Licenses', 'Web Access Info', and 'Expand Items'. Below the tabs, the company name 'Icabods Backflow' is displayed, along with a checked 'Include on Public List' checkbox and a highlighted 'Inactive' checkbox. A red arrow points to the 'Inactive' checkbox. The 'Company Information' section includes fields for Company Name, Address 1, Address 2, City/St/Zip (Oregon City, OR, 97045), Contact Name 1 (Icabod Sellwood), Company Phone ((503) 555-6983), Contact Name 2, Contact Email, and UD 11. The 'License/Registration/Certification' section includes fields for License Agency, Bus. License (Qwi7769), Lic. Amt (0), License Date, Lic. Exp Date (05/27/2010), Reg Agency, Reg Num, Reg Date, Exp Date, Reg Fee (0), Certification Agency, UD 20, Cert Date, Exp Date, Cert Fee (0), UD 01, and UD 02. Below this is the 'BFP Testers List' section, which includes a table with columns for #, Last Name, First Name, Certif Num, Exp Date, Last Test, Phone, RME, and Email. The table contains two rows: 1. Bryant, Nelson, 3326, 11/20/2011, 07/27/2015, (696) 238-0637, and 2. Collins, Glen, 8990, 06/02/2012, 07/27/2015, (696) 238-8577. At the bottom of the interface, there are buttons for 'Add Tester/Inspector', 'Delete Tester/Inspector', and 'View Tester/Inspector', along with a status bar showing '# Items: 2' and navigation buttons.

Notes:



XC2 Software Knowledge Base



How to Change the Company Type in XC2 Backflow

KB Asset ID: 3063

This page describes how to change the company type in XC2 Backflow

Choose a Company

You can change the company type from within the company record

Search for the company and open the company record

#	Company Name	Contact Name 1	Company Phone 1	Bus. License	Lic. Exp Date	Ins
	Screwy Testing Company			Bogus		
	Tweeks Coffee			Shady	04/14/14	
	Stevenson Backflow and Plum	Bjorn Stevenson	(206) 555-4789	Cu469	08/14/15	
	Metro Transit		(503) 555-1111			
	Home Town Backflow	Jasmine Marie Olloffan	(503) 555-1469	12469 WA	09/04/10	
	Zagnutz Testing System	Horace Zagnutz	(503) 555-2368	Abc123	02/21/13	
	City of Snoqualamish	Ralph Goiterman	(503) 555-2587	0123456	10/09/11	
	Metro Transit	Ralph	(503) 555-5599	1111111	04/03/12	
	Tulare County Roadhouse	Sam Imanson	(503) 555-6568	5464	02/20/13	
	Whistler Testing Services	Nathan Wizzing	(503) 555-6962	Zyx 435	04/26/12	
	Icabods Backflow	Icabod Sellwood	(503) 555-6983	Qwi7769	05/27/10	
	Jimbob's Better Backflow	Amos Bell	(696) 240-6471	Qwest	08/15/10	

Notes:

In company record

Inside the company record, click company type

XC2 Software - BFP : Tester Company : Icabods Backflow : 11 of 12 Selected

Company Info Comments/User Defined Fields Additional Licenses Web Access Info Expand Items

Tester Company Include on Public List Inactive Sys ID: 10000005 COMPANY_06.1

Company Information

Company Name: Icabods Backflow
 Address 1: 396 Anyway
 Address 2:
 City/St/Zip: Oregon City OR 97045
 Contact Name 1: Icabod Sellwood
 Company Phone: (503) 555-6983 FAX:
 Contact Name 2: Ph #2:
 Contact Email:
 UD 11: Mail Same as Company

Permit Agency:
 User Defined 18: UD CB 01
 UD Real 04: 0 UD CB 02
 Permit Issue Date: / / UD CB 03
 Permit Exp Date: / / UD CB 04

License/Registration/Certification [Update in List](#)

License Agency:
 Bus. License: Qwi7769 Lic. Amt: 0
 License Date: / /
 Lic. Exp Date: 05/27/2010

Reg Agency:
 Reg Num: Reg Fee: 0
 Reg Date: / /
 Exp Date: / /

Certification Agency:
 UD 20: Cert Fee: 0
 Cert Date: / /
 Exp Date: / /
 UD 01: [Additional Licenses](#)
 UD 02: [Insurance Information](#)

BFP Testers List Waste Disposal Site - Charge for Disposal

BFP Testers List Test Kits List Test History Associated Facility List Notice History Permit/Certification History

#	Last Name	First Name	Certif Num	Exp Date	Last Test	Phone	RME	Email
1	Bryant	Nelson	3326	11/20/2011	07/27/2015	(696) 238-0637		
2	Collins	Glen	8990	06/02/2012	07/27/2015	(696) 238-8577		

Items: 2 [Add Tester/Inspector](#) [Delete Tester/Inspector](#) [View Tester/Inspector](#)

Company Type System Access Module Manager New Search Print Cancel Save

Notes:

Choose desired company type

Choose the desired company type then click ok to complete the process



Notes:



XC2 User Manual

Tester Records

- **Tester Entry Screen Overview**
- **Adding New Tester from Main Screen**
- **Adding New Tester from Test Company Record**
- **What If A Tester Works For More Than 1 Company?**
- **Adding Pictures to Test Record**
- **How to Make a Tester Record Inactive**
- **How to Move Tester History**
- **Update Tester Certification**
- **View Tester History**
- **Tester Analytics**



XC2 Software Knowledge Base



Tester Screen Overview

KB Asset ID: 3605

This page is an overview of XC2's Tester Record Screen

Basic Tester Information

The Top Left Corner of the Screen is where the general information regarding the tester is held. This information includes

- 1) Tester Name
- 2) Job description (Tester or Inspector)
- 3) Default Company
- 4) Driver's License

XC2 Software - BFP : BFP Testers : DEVIN ROBINSON : Cert Num: 5782 : Exp Date: 03/07/2019 : 11 of 22 Selected : WEB SERVER ON : 80 : WEB BFP Test

System ID 100007 PERSONNEL_06-03-A

Tester Information

First Name: DEVIN MI: Last Name: ROBINSON

Salutation: MR. Position:

Full Name: DEVIN ROBINSON

Company: JIMBOB'S BETTER BACKFLOW

Type: Tester Code/Initials: DR

Status: Employee Num: 1

Driver License #: B671G324 Sched Code:

Tester Address

Address 1: 85 CENTER BLVD

Address 2:

City/ST/Zip: SNOQUALAMISH WA 98215

Phone: (696) 237-8072 FAX: (696) 239-7029

Cellular: (696) 238-1814 Pager:

E Mail: tester@xc2.net

Certified for:

Certification #	Certified By	Cert Date	Cert Exp Date
5782	AWWA	03/07/2016	03/07/2019

Cert Number
 Cert Num 2
 Surveys/Insp
 Installations
 Repairs

On Authorized List Not on Public List
 Resp. Managing Employee Web User/Office Only

Local Registration Info

Reg Number:

Reg Date:

Reg Exp Date:

Reg Amt:

Personnel Status Fields

Inactive (Warning)
 Inactive - Permanent
 Personnel UD CB 01
 Personnel UD CB 02

UD Alpha 1: Load Signature
 UD Alpha 2: Secure Comments

Test Kits Licenses/Certifications Test History Notices Other History Survey His

Mfr	Model	Serial #	Default	Cert Date	Cert Due
CONBRACO	40-200-TKS	343212		07/20/2008	07/20/2009
MERIAM	1126	435		10/04/2008	10/04/2009

Add Test Kit Delete Test Kit View Test Kit Expand List

Comments Statistics Photo

Date Expand Comments Paste from Clipbo...
 User Defined Additional Cert Info Click Load From Fi...

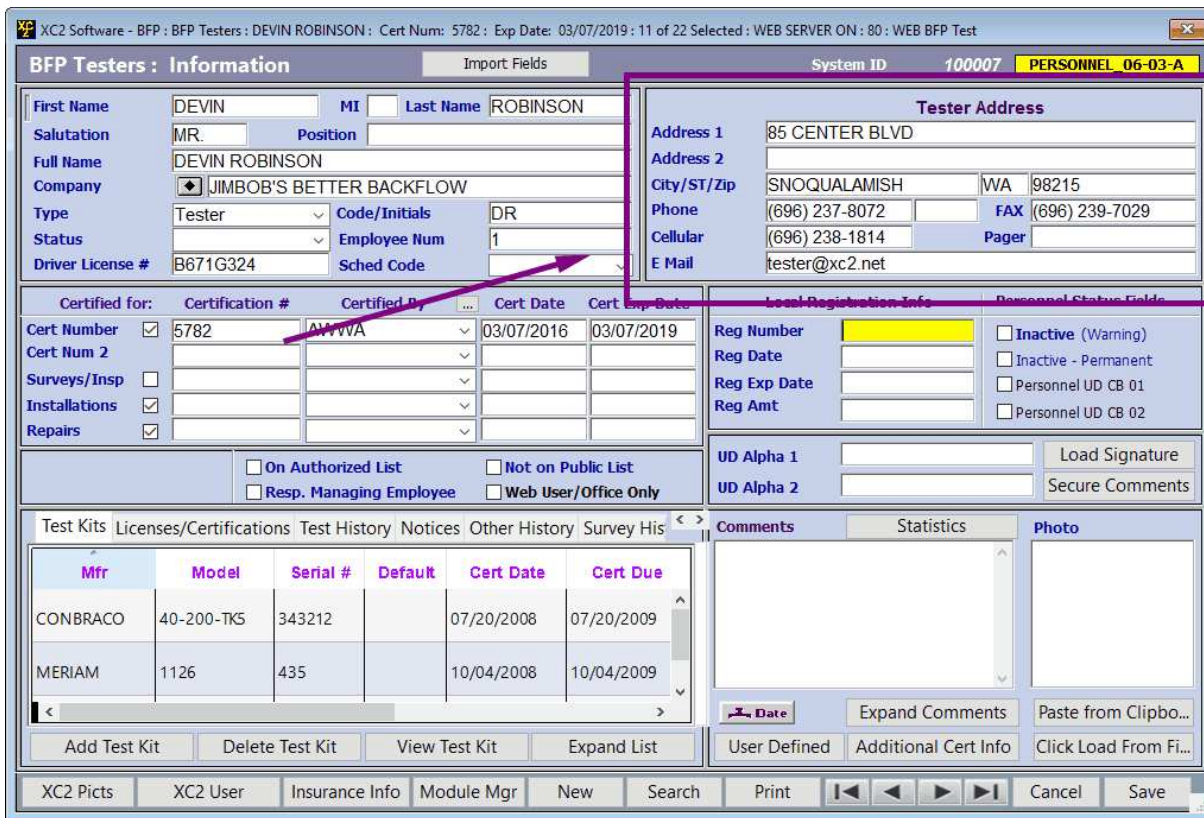
XC2 Picts XC2 User Insurance Info Module Mgr New Search Print Cancel Save

Notes:

Tester Address Information

The Top right corner is the Testers Address information.

Though this address can be the cans as the company address, it can also be different from the company address.



Notes:

Certification Information

Tester Certification information should be entered into this area.

XC2 Software - BFP : BFP Testers : DEVIN ROBINSON : Cert Num: 5782 : Exp Date: 03/07/2019 : 11 of 22 Selected : WEB SERVER ON : 80 : WEB BFP Test

BFP Testers : Information Import Fields System ID 100007 PERSONNEL_06-03-A

First Name: DEVIN MI: Last Name: ROBINSON
 Salutation: MR. Position:
 Full Name: DEVIN ROBINSON
 Company: JIMBOB'S BETTER BACKFLOW
 Type: Tester Code/Initials: DR
 Status: Employee Num: 1
 Driver License #: B671G324 Sched Code:

Tester Address
 Address 1: 85 CENTER BLVD
 Address 2:
 City/ST/Zip: SNOQUALAMISH WA 98215
 Phone: (696) 237-8072 FAX: (696) 239-7029
 Cellular: (696) 238-1814 Pager:
 E Mail: tester@xc2.net

Certified for:	Certification #	Certified By	Cert Date	Cert Exp Date
<input checked="" type="checkbox"/>	5782	AWWA	03/07/2016	03/07/2019
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				

On Authorized List Not on Public List
 Resp. Managing Employee Web User/Office Only

Mfr	Model	Serial #	Default	Cert Date	Cert Due
CONBRACO	40-200-TKS	343212		07/20/2008	07/20/2009
MERIAM	1126	435		10/04/2008	10/04/2009

Add Test Kit Delete Test Kit View Test Kit Expand List

Local Registration Info: Reg Number, Reg Date, Reg Exp Date, Reg Amt
 Personnel Status Fields: Inactive (Warning), Inactive - Permanent, Personnel UD CB 01, Personnel UD CB 02
 UD Alpha 1, UD Alpha 2, Load Signature, Secure Comments, Comments, Statistics, Photo, Date, Expand Comments, Paste from Clipbo..., User Defined, Additional Cert Info, Click Load From Fi...

XC2 Picts XC2 User Insurance Info Module Mgr New Search Print << >> Cancel Save

Notes:

Associated Tester Information

Records that are associated with this tester can be found under this portion of the tester record

Associated Records includes

- 1) Test Kits
- 2) Test History
- 3) Companies
- 4) Notice History
- 5) Test History

BFP Testers : Information Import Fields System ID: 100007 PERSONNEL_06-03-A

First Name: DEVIN MI: Last Name: ROBINSON
 Salutation: MR. Position:
 Full Name: DEVIN ROBINSON
 Company: JIMBOB'S BETTER BACKFLOW
 Type: Tester Code/Initials: DR
 Status: Employee Num: 1
 Driver License #: B671G324 Sched Code:

Tester Address
 Address 1: 85 CENTER BLVD
 Address 2:
 City/ST/Zip: SNOQUALAMISH WA 98215
 Phone: (696) 237-8072 FAX: (696) 239-7029
 Cellular: (696) 238-1814 Pager:
 E Mail: tester@xc2.net

Certified for:	Certification #	Certified By	Cert Date	Cert Exp Date
<input checked="" type="checkbox"/>	5782	AWWA	03/07/2016	03/07/2019
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				

On Authorized List Not on Public List
 Resp. Managing Employee Web User/Office Only

Mfr	Model	Serial #	Default	Cert Date	Cert Due
CONBRACO	40-200-TKS	343212		07/20/2008	07/20/2009
MERIAM	1126	435		10/04/2008	10/04/2009

Buttons: Add Test Kit, Delete Test Kit, View Test Kit, Expand List

Comments, Statistics, Photo
 Date, Expand Comments, Paste from Clipbo...
 User Defined, Additional Cert Info, Click Load From Fi...

Notes:

Registration Information and User Defined fields

This area is for local Registration and user defined fields

You may or may not need to use this area but it is there if you need to

BFP Testers: Information Import Fields System ID: 100007 PERSONNEL_06-03-A

First Name: DEVIN MI: Last Name: ROBINSON
 Salutation: MR. Position:
 Full Name: DEVIN ROBINSON
 Company: JIMBOB'S BETTER BACKFLOW
 Type: Tester Code/Initials: DR
 Status: Employee Num: 1
 Driver License #: B671G324 Sched Code:

Tester Address
 Address 1: 85 CENTER BLVD
 Address 2:
 City/ST/Zip: SNOQUALAMISH WA 98215
 Phone: (696) 237-8072 FAX: (696) 239-7029
 Cellular: (696) 238-1814 Pager:
 E Mail: tester@xc2.net

Certified for:	Certification #	Certified By	Cert Date	Cert Exp Date
<input checked="" type="checkbox"/>	5782	AWWA	03/07/2016	03/07/2019
<input type="checkbox"/>				
<input type="checkbox"/>				
<input checked="" type="checkbox"/>				
<input checked="" type="checkbox"/>				

On Authorized List Not on Public List
 Resp. Managing Employee Web User/Office Only

Mfr	Model	Serial #	Default	Cert Date	Cert Due
CONBRACO	40-200-TK5	343212		07/20/2008	07/20/2009
MERIAM	1126	435		10/04/2008	10/04/2009

Local Registration Info: Reg Number, Reg Date, Reg Exp Date, Reg Amt
 Personnel Status Fields: Inactive (Warning), Inactive - Permanent, Personnel UD CB 01, Personnel UD CB 02
 UD Alpha 1, UD Alpha 2, Load Signature, Secure Comments
 Comments, Statistics, Photo
 Add Test Kit, Delete Test Kit, View Test Kit, Expand List

Notes:



How to Create a New Tester Record in XC2

KB Asset ID: 2598

Page describes how to create a new Tester Record in XC2

Select The Tester List

To create a new tester record

Select the Tester List

Click Add

XC2 Software - BFP : * BFP Testers: 11 of 12 Records : Multi-Line

User Options **Add** Delete Find Sort Show All Export Saved Search Report

Saved Searches BFP Testers 11 of 12 Records Find: Personnel Full Name Go!

#	Full Name	Cert Num	Cert Exp Date	Company Name	Testing OK
1	Sandy Koufax	222	09/26/2017	Icabods Backflow	✓
2	Joe Smoe	1100	09/26/2017	Icabods Backflow	✓
3	Enrico Albinoni	99911	03/17/2011	City of Snoqualamish	✓
4	Salvador Gray	5507	04/04/2011	Whistler Testing Services	✓
5	Nelson Bryant	3326	11/20/2011	Icabods Backflow	✓
6	Devin Robinson	5782	11/20/2011	Jimbo's Better Backflow	✓
7	Horace Zagnutz	246969	12/13/2011	Zagnutz Testing System	✓
8	Alphonzo Hernandez	9488	03/21/2012	Home Town Backflow	✓
	Glen Collins	8990	06/02/2012	Icabods Backflow	✓
10	Ivory Edwards	8302	06/18/2012	Jimbo's Better Backflow	✓
11	Mike Kidd	866969	06/25/2012	Whistler Testing Services	✓

Facility List
BFP Assembly List
Tester List
Company List
BFP History
Survey History
Notice Setup
Send Annual Notices
Automatic Reminders
Compliance Report
Administrator Setup
Lookup/Setup Lists

Selection Opt. Filter On Exclude Inactive BFP Testers Records Send Notice Enter Survey Enter Test Exit XC2

Notes:

Enter Name

Enter the Tester's Name and any Personal Information that you would like.

BFP Testers: Information Import Fields System ID: 100131 PERSONNEL_06-03-A

First Name: Binx MI: Last Name: Bollin
 Salutation: Position:
 Tester Name: Binx Bollin
 Company:
 Type: Tester Initials:
 Status: Employee Num:
 Driver License #: HAA12LFB Schedule Code:

Tester Address
 Address 1: 1234 Main St
 Address 2:
 City/ST/Zip: San Rafael CA 94901
 Phone: (415) 336-3636 FAX: (415) 336-3637
 Cellular: 415 Pager: (415) 222-5522
 E Mail: agoodtester@mailey.com

Certification Data:

Certified for:	Certification #	Certified By	Cert Date	Cert Exp Date
Cert Number <input checked="" type="checkbox"/>			/ /	/ /
Cert Num 2			/ /	/ /
Surveys/Insp <input type="checkbox"/>			/ /	/ /
Installations <input checked="" type="checkbox"/>			/ /	/ /
Repairs <input checked="" type="checkbox"/>			/ /	/ /

Local Registration Info:
 Reg Num: Reg Date: Reg Exp Date: Reg Amt:

Personnel Status Fields:
 Inactive (Warning)
 Inactive - Permanent
 Personnel UD CB 01
 Personnel UD CB 02

Tester Custom 1: Load Signature
 Tester Custom 2: Secure Comments

On Authorized List Not on Public List
 BFP Type Certification Resp. Managing Employee

Test Kits Table:

Mfr	Model	Serial #	Cert Date	Cert Due

Add Test Kit Delete Test Kit View Test Kit Expand List

Comments: Statistics: Photo: Date: Expand Comments: Paste from Clipboard: User Defined: Additional Cert Info: Click Load From File:

XC2 Picts XC2 User Insurance Info Module Mgr New Search Print Cancel Save

Notes:

Tester Company

Enter a test company name.

If the tester company record exists in XC2, the tester will be added to the company record.

If the tester company does not exist in XC2

- Click Create It



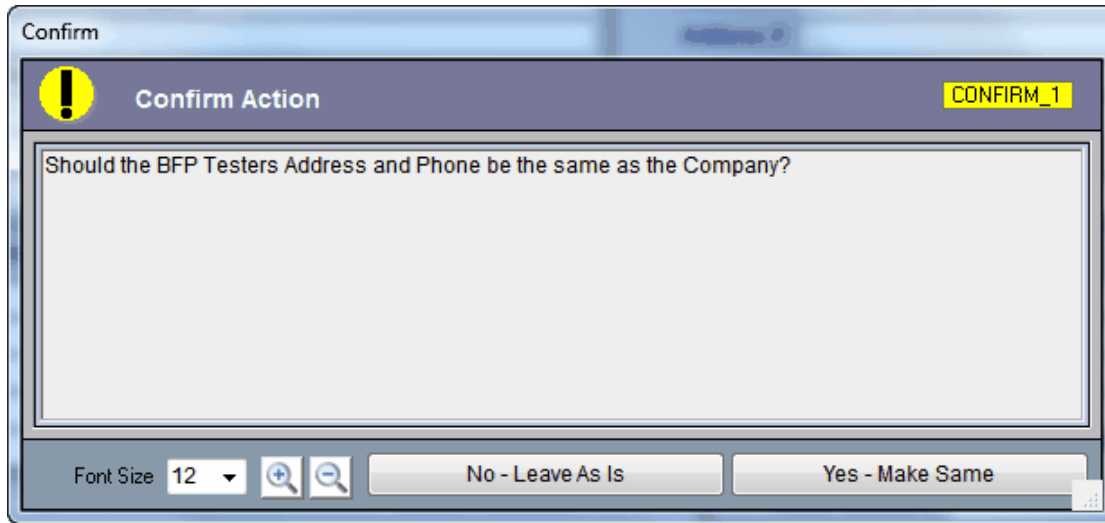
Notes:

Create the Tester Company

If this is a new tester company

Create the tester company record

Select whether the tester company address should be the same as the tester's address



Notes:

Enter Certification Information

Enter any Certification information that you may have

XC2 Software - BFP : BFP Testers : Binx Bollin : Cert Num: : Exp Date: 00/00/0000 : 3 of 3 Selected

BFP Testers : Information System ID 100131 PERSONNEL_06-03-A

Import Fields

First Name MI Last Name
 Salutation Position
 Tester Name
 Company
 Type Initials
 Status Employee Num
 Driver License # Schedule Code

Tester Address
 Address 1
 Address 2
 City/ST/Zip
 Phone FAX
 Cellular Pager
 E Mail

Certified for:	Certification #	Certified By	Cert Date	Cert Exp Date
<input checked="" type="checkbox"/> Cert Number	<input type="text"/>	<input type="text"/>	<input type="text" value="//"/>	<input type="text" value="//"/>
<input type="checkbox"/> Cert Num 2	<input type="text"/>	<input type="text"/>	<input type="text" value="//"/>	<input type="text" value="//"/>
<input type="checkbox"/> Surveys/Insp	<input type="text"/>	<input type="text"/>	<input type="text" value="//"/>	<input type="text" value="//"/>
<input checked="" type="checkbox"/> Installations	<input type="text"/>	<input type="text"/>	<input type="text" value="//"/>	<input type="text" value="//"/>
<input checked="" type="checkbox"/> Repairs	<input type="text"/>	<input type="text"/>	<input type="text" value="//"/>	<input type="text" value="//"/>

Local Registration Info
 Reg Num
 Reg Date
 Reg Exp Date
 Reg Amt

Personnel Status Fields
 Inactive (Warning)
 Inactive - Permanent
 Personnel UD CB 01
 Personnel UD CB 02

Tester Custom 1 Load Signature
 Tester Custom 2 Secure Comments

BFP Type Certification
 On Authorized List
 Not on Public List
 Resp. Managing Employee

Mfr	Model	Serial #	Cert Date	Cert Due	
Mid-West	830	6546544	06/02/2010	06/02/2011	Approved
Meriam	1126	435	10/04/2008	10/04/2009	Approved
Conbraco	40-200-TK5	343212	07/20/2008	07/20/2009	Approved

Test Kits Licenses/Certifications Test History Notices Other History Companies

Comments Statistics Photo

XC2 Picts XC2 User Insurance Info Module Mgr New Search Print Cancel Save

Notes:

Review

The last bit is to just review the information associated with the tester.

Does he have his own test kit?

Does he work for multiple companies?

Do I want to add a photo?

Look through the record then click Save when complete.

System ID: 100087 PERSONNEL_06-03-A

First Name: Binx MI: Last Name: Bollin
 Salutation: Position:
 Full Name: Binx Bollin
 Type: Tester Code/Initials:
 Status: Employee Num:
 Driver License #: HAA12LFB Sched Code:
 On Authorized List Not on Public List Resp. Managing Employee

Company: Jimbob's Better Backflow
 Address 1: 123 Icancount Dr
 Address 2:
 City/ST/Zip: Snoqualamish WA 98215
 Phone: (696) 240-6471 FAX: (696) 239-5958
 Cellular: Pager:
 E Mail:

Certified for:	Certification #	Certified By	Cert Date	Cert Exp Date
Testing <input checked="" type="checkbox"/>			/ /	/ /
Surveys/Insp <input type="checkbox"/>			/ /	/ /
Installations <input checked="" type="checkbox"/>			/ /	/ /
Repairs <input checked="" type="checkbox"/>			/ /	/ /

BFP Type Cert: DC PVB RP DC w/AIR SVB

Mfr	Model	Serial #	Cert Date	Cert Due	Companies
Mid-West	830	6546544	06/02/2010	06/02/2011	Arbuckle Lo
Meriam	1126	435	10/04/2008	10/04/2009	Benedictine
Conbraco	40-200-Tr5	343212	07/20/2008	07/20/2009	Arbuckle Lo

Comments: Tester Statistics/Analytics Photo:

Buttons: Add Test Kit, Delete Test Kit, View Test Kit, Expand List, User Defined, Additional Cert Info, Click Load From File, Cancel, Save

Notes:



XC2 Software Knowledge Base



Add Tester Record from within the Company Record

KB Asset ID: 3606

This page describes how to add a tester record from within the company record.

Search for the Company that you want to add a tester record

Search for record

double click to open

The screenshot shows the XC2 software interface. The title bar reads "XC2 Software - BFP : City of Snoqualamish, WA : * Tester Company: 1 of 17 Records : Multi-Line : WEB SERVER ON : 80 : WEB BFP Test". The main window has a menu bar with "User Options", "Add", "Delete", "Find", "Sort", "Show All", "Export", "Saved Search", and "Report". Below the menu bar, there is a search bar with "Find: Company Name" and a search term "flim" entered. The search results are displayed in a table with the following columns: "#", "Company Name", "Contact Name 1", "Company Phone 1", "Bus. License", and "Lic. Exp Date". The first row of the table is highlighted in blue and contains the following data: "# 1", "Company Name FLIM FLAM TESTING", "Contact Name 1 MRS. FLAM", "Company Phone 1 (225) 456-7894", "Bus. License", and "Lic. Exp Date". On the left side of the window, there is a sidebar with "Run Selected Export" and "Favorite Tasks" sections. The "Favorite Tasks" section includes "Facility List", "BFP Assembly List", "BFP Testers List", "Tester Company List", "Test Kits List", and "Test History". At the bottom of the window, there are buttons for "Send Notice", "Enter Survey", "Enter Test", and "Exit XC2".

#	Company Name	Contact Name 1	Company Phone 1	Bus. License	Lic. Exp Date
1	FLIM FLAM TESTING	MRS. FLAM	(225) 456-7894		

Notes:

Inside of the Company Record

From Tester List

Click Add Tester/Inspector

The screenshot shows the 'BFP Testers List' for the company 'FLIM FLAM TESTING'. The table below contains the following data:

#	Last Name	First Name	Certif Num	Exp Date	Last Test	Phone	RME	Email	Inactive
1	EASTLAND	BOB	558	03/10/2019	05/06/2016	(225) 456-7894		flim@flam.com	-
2	BOB	EASTLAND	22365	03/10/2019	06/02/2016	(225) 456-7894		flim@flam.com	-

At the bottom of the table, there is a button labeled 'Add Tester/Inspector' which is highlighted with a red box. Other buttons include 'Delete Tester/Inspector...', 'View Tester/Inspector', and 'Exclude Inactive'.

Notes:

Tester Record will be added

XC2 Software - BFP : Tester Company : FLIM FLAM TESTING : 1 of 1 Selected : WEB SERVER ON : 80 : WEB BFP Test

Company Info Comments/User Defined Fields Additional Licenses Web Access Info Expand Items

Tester Company Include on Public List Inactive Sys ID: 10000041 COMPANY_06.1

Company Information

Company Name: FLIM FLAM TESTING
 Address 1: 2222 BOGUS
 Address 2:
 City/St/Zip: FAIRFAX CA 94930
 Contact Name 1: MRS. FLAM
 Company Phone: (225) 456-7894 FAX:
 Contact Name 2: Ph #2:
 Contact Email: flim@flam.com
 UD 11: Mail Same as Company

License/Registration/Certification Update in List

License Agency:
 Bus. License: Lic. Amt: 0
 License Date:
 Lic. Exp Date:
 Reg Agency:
 Reg Num: Reg Fee: 0
 Reg Date:
 Exp Date:
 Certification Agency:
 UD 20: Cert Fee: 0
 Cert Date: Additional Licenses
 Exp Date: Insurance Information
 UD 01: XC2 Picts
 UD 02:

BFP Testers List

BFP Testers List Test Kits List Web Users Test History Associated Facility List Notice History Permit/Certification History

#	Last Name	First Name	Certif Num	Exp Date	Last Test	Phone	RME	Email	Inactive
1	EASTLAND	BOB	558	03/10/2019	05/06/2016	(225) 456-7894		flim@flam.com	-
2	HOWDEY	BOY	123321	02/02/2020		(225) 456-7894		flim@flam.com	-
3	ROB	EASTLAND	22365	03/10/2019	06/02/2016	(225) 456-7894		flim@flam.com	-

XC2 Picts # Items: 3 Add Tester/Inspector Delete Tester/Inspec... View Tester/Inspector Exclude Inactive

Company Type System Access Module Mgr New Search Print << < > >> Cancel Save

Notes:



How to Set Up A Tester For Multiple Companies

KB Asset ID: 2105

If a tester works for multiple testing companies, you can add multiple companies to their tester record.

Note: This Feature became available in build 1040

Open a Tester Record

Open a Tester Record

Select the Companies Tab

Click add Company

The screenshot shows the 'BFP Testers : Information' window for Eddy Walker. The 'Companies' tab is selected, showing a table with one entry: 'Tin Star Service' with a checkmark in the 'Default' column. The 'Add Company' button at the bottom of the table is highlighted with a red box. A red arrow points from the 'Companies' tab label to the 'Add Company' button. Other tabs include 'Test Kits', 'Licenses/Certifications', 'Test History', 'Notes', and 'Other'. The right side of the window contains fields for 'Local Registration Info' and 'Personnel Status Fields'.

Notes:

Search for the Company

Type a portion of the company's name, then press the tab key on your keyboard

Find a Company

Find Company

Company_Name AD

Company Name	Address	City	ID

Cancel Select

Notes:

Highlight Company

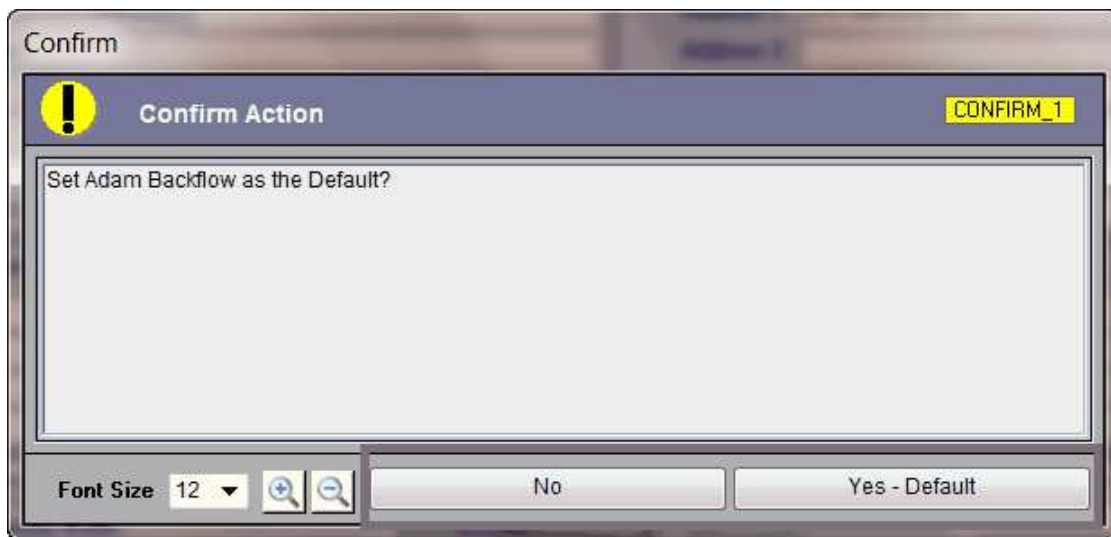
Highlight the company name, then press Select



Notes:

Confirm

Select "Yes - Default" or "No"



Notes:

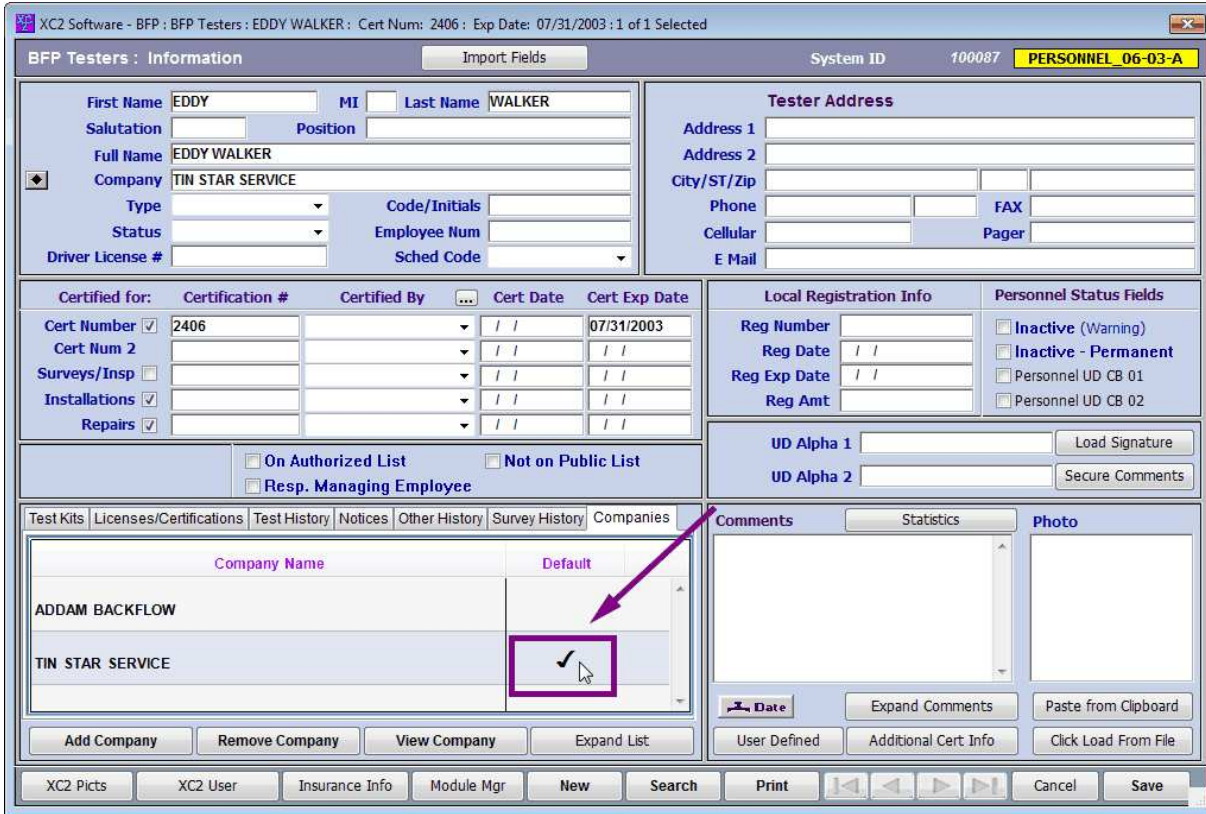
Setting the Default Company

If a tester is associated with multiple company records, you can select the tester's default company.

The default company should be the tester's main testing company.

To select the default company, double click to the right of the company name to move the checkmark.

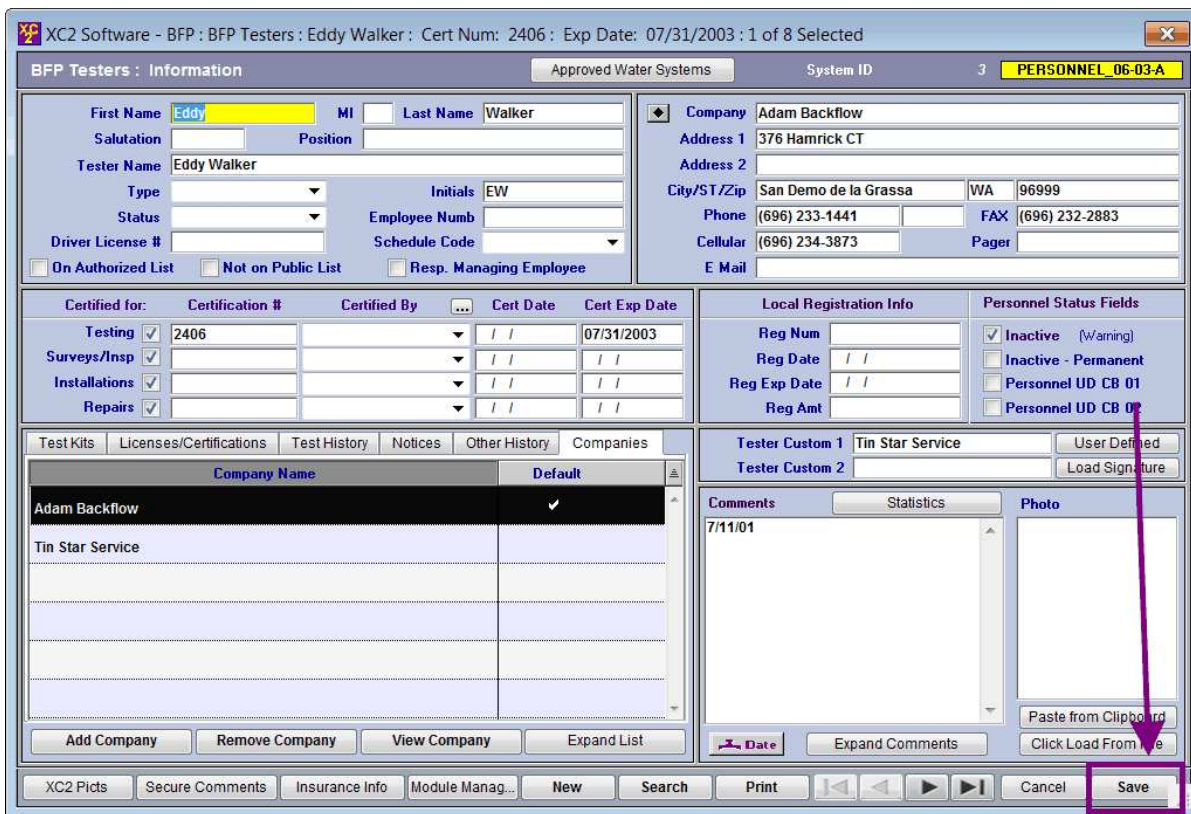
The company with the checkmark is the default company.



Notes:

The Company will be added to the record.

When you are finished, click the Save button.



Notes:



XC2 Software Knowledge Base



Adding Tester Pictures in XC2

KB Asset ID: 3607

This page describes how to upload pictures of testers in XC2.

Picture Of Tester

A Testers Picture can be uploaded directly into XC2. This picture can be viewed from the main tester record Page


XC2 Software - BFP : BFP Testers : BOY HOWDEY : Cert Num: 123321 : Exp Date: 02/02/2020 : 1 of 1 Selected : WEB SERVER ON : 80 : WEB BFP Test

BFP Testers : Information System ID 100098 PERSONNEL_06-03-A

First Name <input type="text" value="BOY"/> MI <input type="text"/> Last Name <input type="text" value="HOWDEY"/> Salutation <input type="text" value="MR."/> Position <input type="text" value="TESTER"/> Full Name <input type="text" value="BOY HOWDEY"/> Company <input type="text" value="FLIM FLAM TESTING"/> Type <input type="text" value="Tester"/> Code/Initials <input type="text" value="BH"/> Status <input type="text"/> Employee Num <input type="text" value="321"/> Driver License # <input type="text" value="50"/> Sched Code <input type="text"/>	Tester Address Address 1 <input type="text" value="2222 BOGUS"/> Address 2 <input type="text"/> City/ST/Zip <input type="text" value="FAIRFAX"/> <input type="text" value="CA"/> <input type="text" value="94930"/> Phone <input type="text" value="(225) 456-7894"/> FAX <input type="text"/> Cellular <input type="text"/> Pager <input type="text"/> E Mail <input type="text" value="flim@flam.com"/>
---	--

Certified for: Certification # Certified By Cert Date Cert Exp Date Cert Number <input checked="" type="checkbox"/> 123321 AWWA 02/02/2017 02/02/2020 Cert Num 2 <input type="checkbox"/> Surveys/Insp <input type="checkbox"/> Installations <input checked="" type="checkbox"/> Repairs <input checked="" type="checkbox"/>	Local Registration Info Reg Number <input type="text"/> Reg Date <input type="text"/> Reg Exp Date <input type="text"/> Reg Amt <input type="text"/> UD Alpha 1 <input type="text"/> Load Signature UD Alpha 2 <input type="text"/> Secure Comments	Personnel Status Fields <input type="checkbox"/> Inactive (Warning) <input type="checkbox"/> Inactive - Permanent <input type="checkbox"/> Personnel UD CB 01 <input type="checkbox"/> Personnel UD CB 02
--	--	--

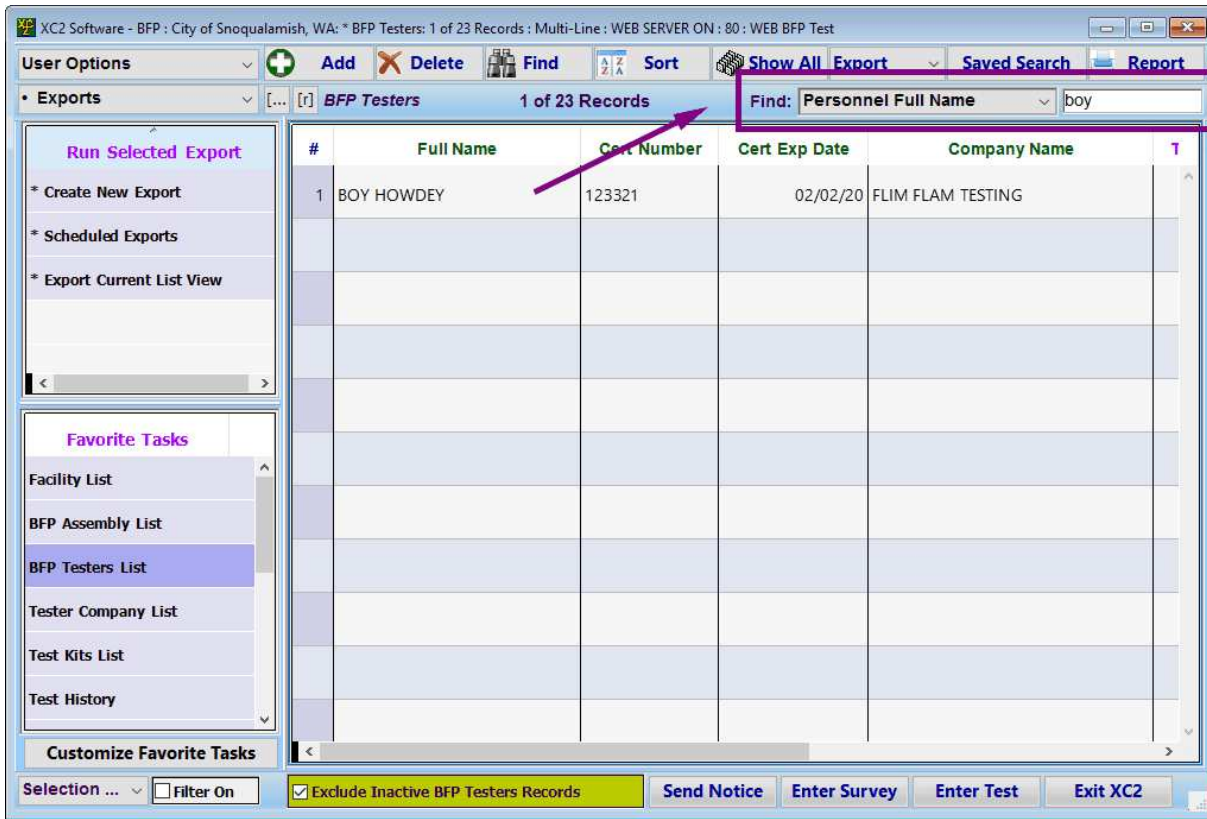
On Authorized List Not on Public List
 Resp. Managing Employee Web User/Office Only

Test Kits Licenses/Certifications Test History Notices Other History Survey History <table border="1"> <thead> <tr> <th>Mfr</th> <th>Model</th> <th>Serial #</th> <th>Default</th> <th>Cert Date</th> <th>Cert Due</th> </tr> </thead> <tbody> <tr> <td>Watts</td> <td>TK9A</td> <td>SERIAL NUMBER 1</td> <td>✓</td> <td>02/02/2017</td> <td>02/02/2018</td> </tr> </tbody> </table>	Mfr	Model	Serial #	Default	Cert Date	Cert Due	Watts	TK9A	SERIAL NUMBER 1	✓	02/02/2017	02/02/2018	Comments <input type="text"/> Statistics <input type="text"/> Photo 
Mfr	Model	Serial #	Default	Cert Date	Cert Due								
Watts	TK9A	SERIAL NUMBER 1	✓	02/02/2017	02/02/2018								

Notes:

Search for tester record

Double click to open the record



Notes:

Inside Tester Record

Click Load From F.

BFP Testers : Information Import Fields System ID 100098 PERSONNEL_06-03-A

First Name: BOY MI: Last Name: HOWDEY
 Salutation: MR. Position: TESTER
 Full Name: BOY HOWDEY
 Company: FLIM FLAM TESTING
 Type: Tester Code/Initials: BH
 Status: Employee Num: 321
 Driver License #: 50 Sched Code:

Tester Address
 Address 1: 2222 BOGUS
 Address 2: City/ST/Zip: FAIRFAX CA 94930
 Phone: (225) 456-7894 FAX: Cellular: Pager: E Mail: flim@flam.com

Certified for:	Certification #	Certified By	Cert Date	Cert Exp Date
<input checked="" type="checkbox"/>	123321	AWWA	02/02/2017	02/02/2020
<input type="checkbox"/>				
<input type="checkbox"/>				
<input checked="" type="checkbox"/>				
<input checked="" type="checkbox"/>				

Mfr	Model	Serial #	Default	Cert Date	Cert Due
Watts	TK9A	SERIAL NUMBER 1	✓	02/02/2017	02/02/2018

Buttons: Add Test Kit, Delete Test Kit, View Test Kit, Expand List

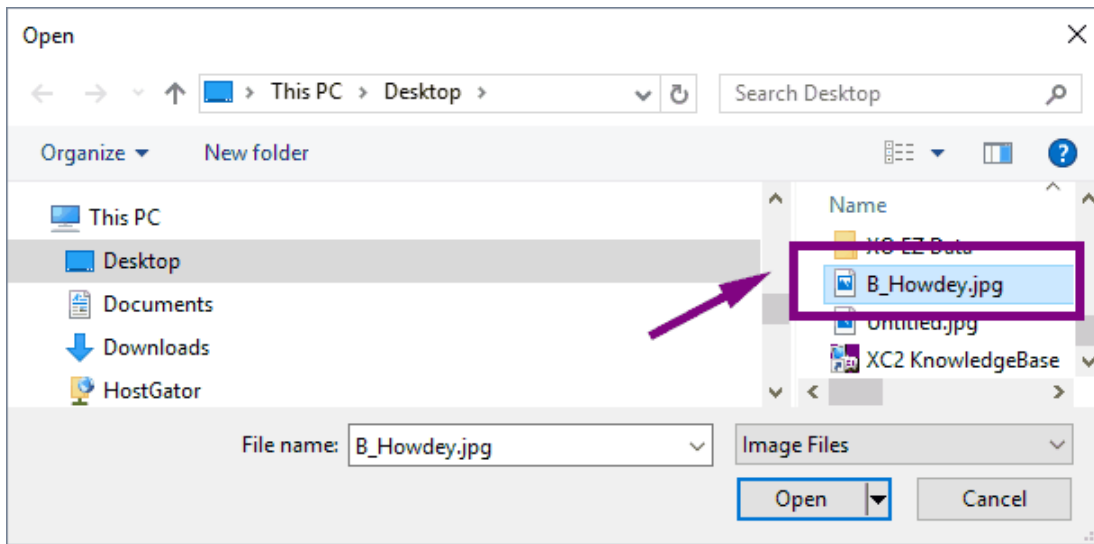
Bottom Bar: XC2 Picts, XC2 User, Insurance Info, Module Mgr, New, Search, Print, Cancel, Save

Red arrow points to: **Click Load From Fi...**

Notes:

Navigate to Picture

Select the Picture that you would like to upload



Notes:

Picture will be uploaded

XC2 Software - BFP : BFP Testers : BOY HOWDEY : Cert Num: 123321 : Exp Date: 02/02/2020 : 1 of 1 Selected : WEB SERVER ON : 80 : WEB BFP Test

BFP Testers : Information Import Fields System ID **100098** **PERSONNEL_06-03-A**

First Name BOY **MI** **Last Name** HOWDEY
Salutation MR. **Position** TESTER
Full Name BOY HOWDEY
Company FLIM FLAM TESTING
Type Tester **Code/Initials** BH
Status **Employee Num** 321
Driver License # 50 **Sched Code**

Tester Address
Address 1 2222 BOGUS
Address 2
City/ST/Zip FAIRFAX CA 94930
Phone (225) 456-7894 **FAX**
Cellular **Pager**
E Mail flim@flam.com


Certified for:	Certification #	Certified By	Cert Date	Cert Exp Date
<input checked="" type="checkbox"/> Cert Number	123321	AWWA	02/02/2017	02/02/2020
<input type="checkbox"/> Cert Num 2				
<input type="checkbox"/> Surveys/Insp				
<input checked="" type="checkbox"/> Installations				
<input checked="" type="checkbox"/> Repairs				

On Authorized List Not on Public List
 Resp. Managing Employee Web User/Office Only

Mfr	Model	Serial #	Default	Cert Date	Cert Due
Watts	TK9A	SERIAL NUMBER 1	✓	02/02/2017	02/02/2018

Local Registration Info **Personnel Status Fields**
Reg Number Inactive (Warning)
Reg Date Inactive - Permanent
Reg Exp Date Personnel UD CB 01
Reg Amt Personnel UD CB 02

UD Alpha 1 Load Signature
UD Alpha 2 Secure Comments

Comments **Statistics** **Photo**


XC2 Picts XC2 User Insurance Info Module Mgr New Search Print << < > >> Cancel Save

Notes:



How to make a Tester Record Inactive

KB Asset ID: 3644

The page below describes how to make a Tester Record inactive.

Why Make Tester Records Inactive?

The purpose of inactivating Tester records is to remove them from XC2's Certified Tester List. If a Tester is marked inactive, he or she cannot be selected when you are entering tests, surveys, repairs, etc.

Reasons to Inactivate Tester Records:

- 1) The Tester Record is a Bogus Tester
- 2) The Tester is no longer testing
- 3) The Tester has moved out of the area

The screenshot shows the 'BFP Testers: Information' window for Salvador Gray. The 'Personnel Status Fields' section is highlighted with a red box, and a red arrow points to the 'Inactive - Permanent' checkbox, which is checked. Other visible fields include 'First Name: SALVADOR', 'Last Name: GRAY', 'Certification # 5507', and 'Cert Date 03/02/2017'. The 'Test Kits' table is also visible at the bottom.

Mfr	Model	Serial #	Default	Cert Date	Cert Due
ITT BARTON	247	Wwsqa Qq	✓	09/23/2015	09/23/2016
DUKE	EZ-900	23455434		07/23/2008	07/23/2009

Notes:

Tester List

To make a Tester Record inactive, you need to first open a Tester Record.

- Click on the Tester List
- Double click on the tester record you would like to inactivate

The screenshot shows the XC2 Software interface for BFP Testers. The main window displays a table with 11 records. The left sidebar has a 'Favorite Tasks' section where 'BFP Testers List' is highlighted. A red arrow points to the 8th record in the table, which is for Nelson Bryant.

#	Full Name	Cert Number	Cert Exp Date	Company Name	Testing OK	Installer	Inspector	Perso
1	MIKE KIDD	696969	06/25/12		✓	✓	✓	
2	SALVADOR GRAY	5507	01/01/17		✓	✓	✓	
3	IVORY EDWARDS	8302	05/23/18		✓	✓	✓	
4	JOE SMOE	123455555	05/27/18	ICABODS BACKFLOW 2	✓	✓	-	
5	WEBBY ENTRY	123	06/09/18	WEBBY	✓	✓	-	
6	ALBERT MARTINEZ	568887	06/20/18	ACE FIRE TESTING COMPANY	-	-	-	
7	WEB TEST	123456888	06/27/18	ACE FIRE TESTING COMPANY	✓	✓	-	
8	NELSON BRYANT	3326	11/19/18	ICABODS BACKFLOW 2	✓	✓	-	
9	ALPHONZO HERNANDEZ	9488	11/24/18	JACKSONS	✓	✓	✓	
10	VINCENTE PERRY	6413	11/24/18	JACKSONS	✓	✓	-	
11	GLEN COLLINS	8990	11/24/18	ICABODS BACKFLOW 2	✓	✓	✓	

Notes:

Two Ways to Inactivate Tester Records

In the Tester Record, there are two checkboxes that will make the Tester Record inactive.

- 1) Inactive (Warning)
- 2) Inactive Permanent

Mfr	Model	Serial #	Default	Cert Date	Cert Due
ITT BARTON	247	Wwsqa Qq	✓	09/23/2015	09/23/2016
DUKE	EZ-900	23455434		07/23/2008	07/23/2009

Notes:

Inactive Permanent

If Inactive Permanent is selected, the Tester will not be available for test entry and will not appear on the Certified Tester list printed out of XC2.

Select Inactive Permanent if the Tester Record will not be active anytime in the future.

When Inactive Permanent is selected, it will be as if the record does not exist in XC2.

XC2 Software - BFP : BFP Testers : SALVADOR GRAY : Cert Num: 5507 : Exp Date: 01/01/2017 : 2 of 15 Selected

BFP Testers : Information Import Fields System ID 100003 PERSONNEL_06-03-A

First Name SALVADOR MI Last Name GRAY
Salutation MR. Position
Full Name SALVADOR GRAY
Company
Type Code/Initials HG
Status Status 1 Employee Num
Driver License # Sched Code

Tester Address
Address 1 8782 MAIN STREET
Address 2
City/ST/Zip SNOQUALAMISH WA 98215
Phone (696) 239-0602 FAX (696) 239-5073
Cellular (696) 240-4661 Pager
E Mail

Certified for: Certification # Certified By Cert Date Cert Exp Date
Cert Number 5507 03/02/2017 03/02/2019
Cert Num 2
Surveys/Insp
Installations
Repairs

Local Registration Info
Reg Number
Reg Date
Reg Exp Date
Reg Amt

Personnel Status Fields
 Inactive (Warning)
 Inactive - Permanent
 Personnel UD CB 01
 Personnel UD CB 02

UD Alpha 1 Load Signature
UD Alpha 2 Secure Comments

On Authorized List Not on Public List
Resp. Managing Employee

Test Kits Licenses/Certifications Test History Notices Other History Survey History Companies

Mfr	Model	Serial #	Default	Cert Date	Cert Due
ITT BARTON	247	Wwsqa Qq	✓	09/23/2015	09/23/2016
DUKE	EZ-900	23455434		07/23/2008	07/23/2009

Add Test Kit Delete Test Kit View Test Kit Expand List

Comments Statistics Photo
Date Expand Comments Paste from Clipboard
User Defined Additional Cert Info Click Load From File

XC2 Picts XC2 User Insurance Info Module Mgr New Search Print Cancel Save

Notes:

Inactive (Warning)

If Inactive Warning is selected, you will have the opportunity to activate the record during test entry.

Select Inactive Warning if there is a possibility that the Tester will become active in the future.

Certified for:	Certification #	Certified By	Cert Date	Cert Exp Date
<input checked="" type="checkbox"/> Cert Number	5507		03/02/2017	03/02/2019
<input checked="" type="checkbox"/> Cert Num 2			/ / /	/ / /
<input checked="" type="checkbox"/> Surveys/Insp			/ / /	/ / /
<input checked="" type="checkbox"/> Installations			/ / /	/ / /
<input checked="" type="checkbox"/> Repairs			/ / /	/ / /

Mfr	Model	Serial #	Default	Cert Date	Cert Due
ITT BARTON	247	Wwsqa Qq	✓	09/23/2015	09/23/2016
DUKE	EZ-900	23455434		07/23/2008	07/23/2009

Notes:

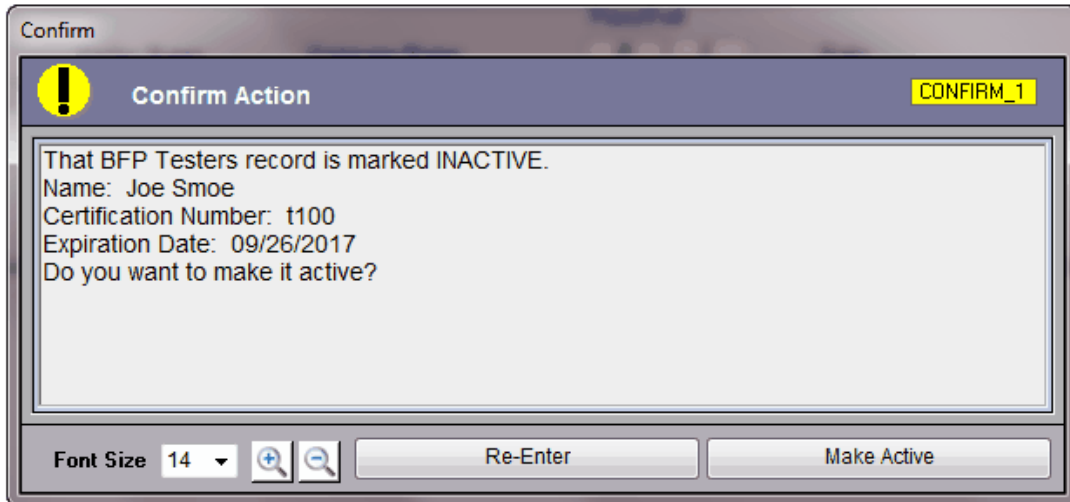
How Does it Work?

When Entering Tests in XC2

If you type the Tester's information in XC2's test entry screen, XC2 will ask you if you would like to activate the record.

Below Shows this Warning:

- If you would like to Activate the Tester, Click Activate
- If you do not want to Activate the Tester, Click Re-Enter



Notes:



How To Move Tester History

KB Asset ID: 2670

This page describes how to move tester history from one tester record to another

Why Move Test History?

Why Move Test History?

The most common reason people decide to move tester history is because of duplicate records entered in XC2.

What Gets Moved?

Records that can be moved include

- Initial Test History
- Final Test History
- Repair History
- Survey History
- Followup Survey History

Select the Tester List

To move the tester's history, select the Tester List

On the Tester List search for the Tester for whom you would like to move the history.

Hint: If you are moving Tester History because you have duplicate tester records, make a change to the name of the Tester you would like to move. It will help later in the process.

The screenshot shows the 'BFP Testers' window in the XC2 software. The window title is 'XC2 Software - BFP : City of Snoqualamish, WA: * BFP Testers: 2 of 14 Records : Multi-Line'. The interface includes a toolbar with 'Add', 'Delete', 'Find', 'Sort', 'Show All', 'Export', 'Saved Search', and 'Report' buttons. A search bar is set to 'Personnel Full Name' with a 'Go!' button. A sidebar on the left contains a 'Quick Lookups' menu with options like 'Run Selected Lookup', 'Automatic Reminders', 'Overdue Notices', 'Overdue Tests', 'Failed Assemblies', 'Unprinted Test Report Results', 'Tests Due Lookup', 'Tester Certifications Due', 'Facility List', 'BFP Assembly List', 'Tester List' (highlighted with a red box), 'Company List', 'BFP History', 'Survey History', 'Notice Setup', 'Send Annual Notices', 'Automatic Reminders', 'Compliance Report', 'Administrator Setup', and 'Lookup/Setup Lists'. The main table displays two records:

#	Full Name	Cert Num	Cert Exp Date	Company Name	Testing UK	Installer
1	Binx Bollin			Jimbo's Better Backflow	✓	✓
2	Binx\$ Bollin\$			Jimbo's Better Backflow	✓	✓

Important Note

Before moving Tester History, make sure the list has only the record you would like to move history out of.

The screenshot shows the 'BFP Testers' window in the XC2 Software. The window title is 'XC2 Software - BFP : City of Snoqualamish, WA: * BFP Testers: 1 of 14 Records : Multi-Line'. The interface includes a menu bar with options like 'Add', 'Delete', 'Find', 'Sort', 'Show All', 'Export', 'Saved Search', and 'Report'. Below the menu bar, there's a search bar with 'Personnel Full Name' and a 'Go!' button. The main area is a table with columns: '#', 'Full Name', 'Cert. Num.', 'Cert. Exp. Date', 'Company Name', 'Testing OK', and 'Installer'. The first row is highlighted with a red box and contains the following data: '# 1', 'Full Name Binx\$ Bollin\$', 'Cert. Num.', 'Cert. Exp. Date', 'Company Name Jimbob's Better Backflow', 'Testing OK', and 'Installer'. On the left side, there's a 'Quick Lookups' menu with options like 'Automatic Reminders', 'Overdue Notices', 'Overdue Tests', 'Failed Assemblies', 'Unprinted Test Report Results', 'Tests Due Lookup', and 'Tester Certifications Due'. Below this menu is a list of buttons: 'Facility List', 'BFP Assembly List', 'Tester List' (which is selected), 'Company List', 'BFP History', 'Survey History', 'Notice Setup', 'Send Annual Notices', 'Automatic Reminders', 'Compliance Report', 'Administrator Setup', and 'Lookup/Setup Lists'. At the bottom, there are buttons for 'Send Notice', 'Enter Survey', 'Enter Test', and 'Exit XC2', along with checkboxes for 'Filter On' and 'Exclude Inactive BFP Testers Records'.

#	Full Name	Cert. Num.	Cert. Exp. Date	Company Name	Testing OK	Installer
1	Binx\$ Bollin\$			Jimbob's Better Backflow	✓	✓

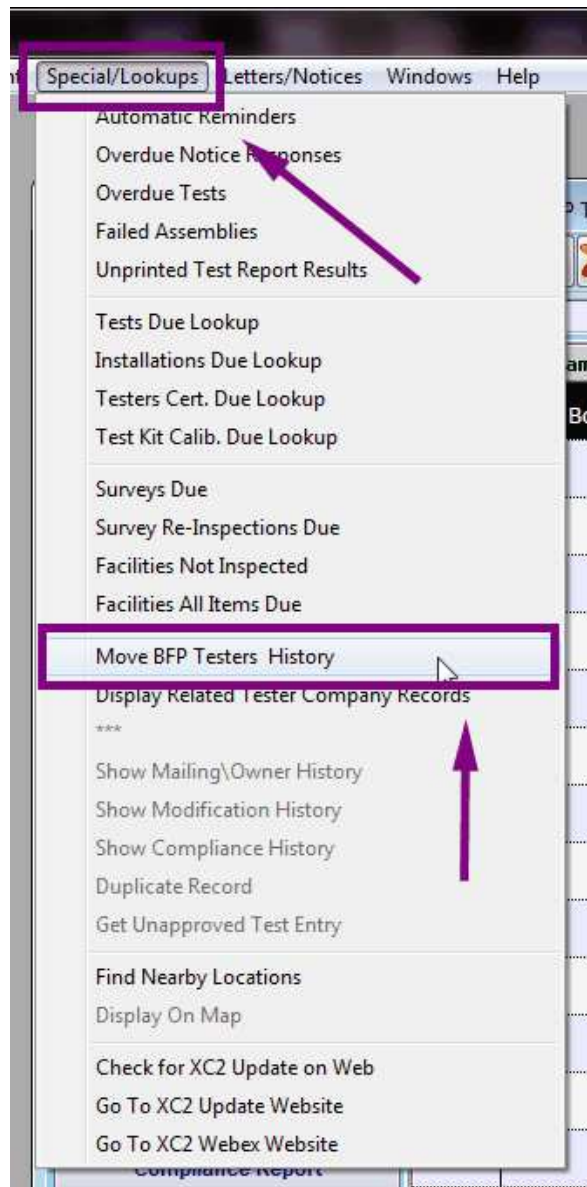
Notes:

Move History

Once you have your list, select

Special/Lookups

Move BFP Testers History



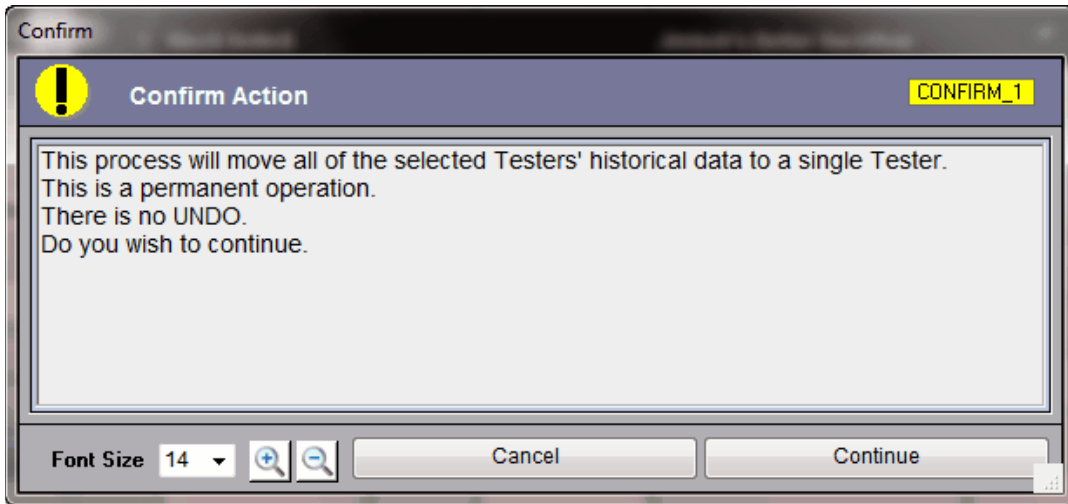
Notes:

Confirm Action

Confirm that this is what you would like to do.

Note: there is No Undo function - once you move the history, the history has been moved.

Click Cancel or Continue



Notes:

Select the tester

Choose the Tester you would like to move the Test history to.

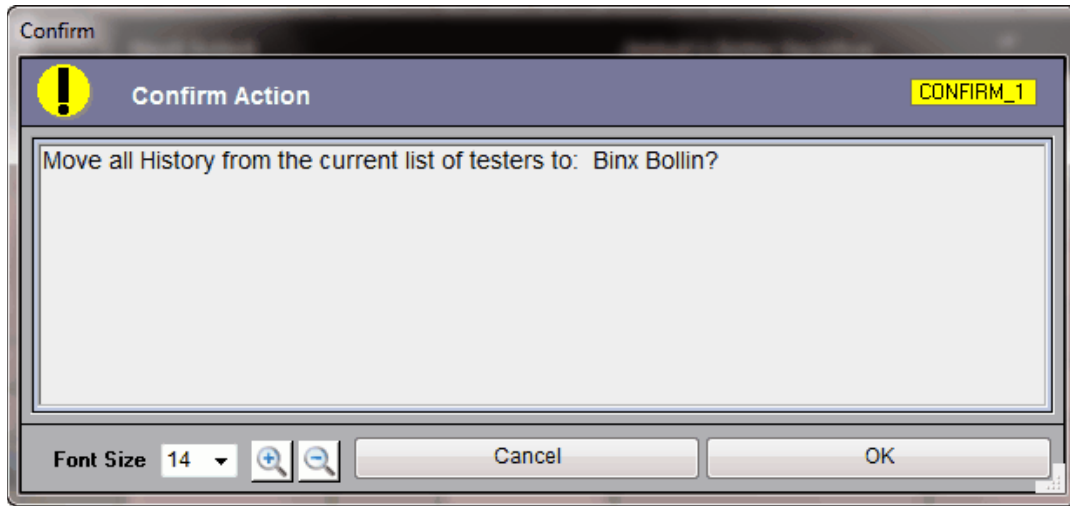
Click Select

Note: This is why it may be helpful to slightly change the name of the Duplicate Tester record

#	Personnel Full Name	Personnel Certifi	Company Name	Personnel	Certificate Expiration Date
1	Alphonzo Hernandez	9488	Home Town Backflow	AH	03/21/2012
2	Binx Bollin		Jimbo's Better Backflow		
3	Binx\$ Bollin\$		Jimbo's Better Backflow		
4	Devin Robinson	5782	Jimbo's Better Backflow	DR	11/20/2011
5	Enrico Albinoni	99911	City of Snoqualamish	EA	03/17/2011
6	Glen Collins	8990	Icabods Backflow	GC	06/02/2012
7	Horace Zagnutz	246969	Zagnutz Testing System	HZ	12/13/2011
8	Ivory Edwards	8302	Jimbo's Better Backflow	IE	06/18/2012
9	Joe Smoe	t100	Icabods Backflow		09/26/2017
10	Mike Kidd	696969	Whistler Testing Services		06/25/2012
11	Nelson Bryant	3326	Icabods Backflow	NB	11/20/2011
12	Salvador Gray	5507	Whistler Testing Services	HG	04/04/2011
13	Sandy Koufax	222	Icabods Backflow		09/26/2017

Notes:

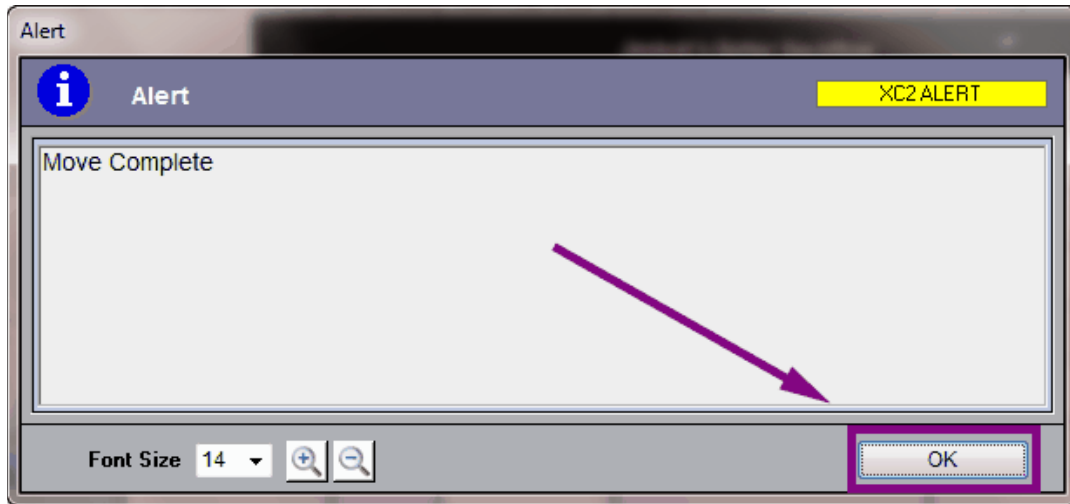
Confirm that this is what you would like to do



Notes:

Confirmation

Click OK to complete



Notes:



XC2 Software Knowledge Base



How to Change Tester Certification Information

KB Asset ID: 2163

If your testers have individual certification information for Testing, Surveys/Inspections, Installations and Repairs. You can track these Dates within the tester record.

Note

These fields are found on the Tester Input - # 3 Screen. To see what screen you are currently using, click on the link below.

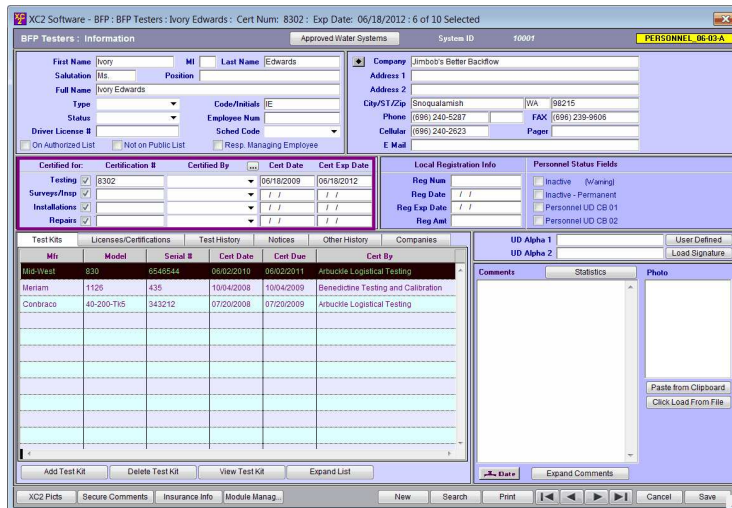
[How to Select the Large Tester Screen](#)

Tester Record

Open a Tester record, the Tester Certification Information is located on the left center portion of the screen.

Here You can track

- Testing Certification
- Survey / Inspections Certification
- Installation Certification
- Repair Certification



Notes:



How to View the Test History in a Tester Record

KB Asset ID: 2162

A Tester's test history can be accessed directly from the tester's record.

Test History

To view the history, open a tester record and click on the Test History tab.

The Test History tab will display every test entered in XC2 that has been completed by that tester.

Test history data displayed includes

- Date Test Completed
- Address of Assembly
- Test Results
- Serial Number
- PSID values

The screenshot shows the 'BFP Testers: Information' window in XC2 software. The 'Test History' tab is selected, displaying a table of test records. The table has columns for Test Date, Address, Results, Serial Num, Type, CV1, CV2, RV, and PVB Air. Below the table are buttons for 'Add Test Kit', 'Delete Test Kit', 'View Test Kit', and 'Expand List'. The right side of the window contains 'Local Registration Info' and 'Personnel Status Fields'.

Test Date	Address	Results	Serial Num	Type	CV1	CV2	RV	PVB Air
12/13/2013	1802 Woodcreek Pl	PASS		RP				
12/13/2013	1802 Woodcreek Pl	PASS		RP				
12/13/2013	1802 Woodcreek Pl	PASS		RP				
11/29/2011	9095 S Greyson Dr	FAIL/PASS	144461	DC				
11/06/2011	9089 S Linksway Dr	PASS	998733	RP	8.4		3.9	
10/09/2011	7480 N Lakehurst CT	PASS	JL11615	RP	8.4		3.2	
10/06/2011	515 W Vinson Dr	PASS	974064	RP	8.5		2.9	
08/15/2011	8350 Lighthouse CT	PASS	827778	RP	6.8		3.2	
07/10/2011	1802 Woodcreek Pl	PASS	LL42640	RP	6.4		2.9	
05/12/2011	6916 W Crooked Elm CT	PASS	2002039	RP	6.8		3.1	

Notes:



Display Tester Analytics: e.g. How Many Tests, Repairs, etc.

KB Asset ID: 2672

Tester Analytics provide a total count of tasks performed by a given tester.

Tester Analytics Screen

Tester Analytics summarizes the work performed by individual testers.

Tester Analytics Show:

- 1) How many Initial Tests
- 2) How Many Final Tests
- 4) How Many Repairs
- 5) How Many Installations
- 6) How Many Initial Surveys

Tester Statistics : Salvador Gray : 5507 : HG

Tester Analytics

Statistics for: **Salvador Gray** **5507** **HG**

Date Range: To:

Work Task	Count
Initial Tests	38
Final Tests	4
Repairs	17
Installations	1
Initial Surveys	9
Followup Surveys	
Other	

Notes:

Tester List

Tester Analytics is located inside the Tester Record

Click the Tester List

Double click on the Tester record you would like to open

XC2 Software - BFP : City of Snoqualamish, WA: * BFP Testers: 13 of 14 Records : Multi-Line

User Options: Add, Delete, Find, Sort, Show All, Export, Saved Search, Report

Quick Lookups: BFP Testers (13 of 14 Records) Find: Personnel Full Name Go!

#	Full Name	Cert Num	Cert Exp Date	Company Name	Testing OK	Installer
1	Binx Bollin			Jimbob's Better Backflow	✓	✓
2	Binx\$ Bollin\$			Jimbob's Better Backflow	✓	✓
3	Enrico Albinoni	99911	03/17/2011	City of Snoqualamish	✓	✓
4	Salvador Gray	5507	04/04/2011	Whistler Testing Services	✓	✓
5	Nelson Bryant	3326	11/20/2011	Icabods Backflow	✓	✓
6	Devin Robinson	5782	11/20/2011	Jimbob's Better Backflow	✓	✓
7	Horace Zagnutz	246969	12/13/2011	Zagnutz Testing System	✓	✓
8	Alphonzo Hernandez	9488	03/21/2012	Home Town Backflow	✓	✓
9	Glen Collins	8990	06/02/2012	Icabods Backflow	✓	✓
10	Ivory Edwards	8302	06/18/2012	Jimbob's Better Backflow	✓	✓
11	Mike Kidd	696969	06/25/2012	Whistler Testing Services	✓	✓
12	Sandy Koufax	222	09/26/2017	Icabods Backflow	✓	✓
13	Joe Smoe	t100	09/26/2017	Icabods Backflow	✓	✓

Selection Opt. Filter On Exclude Inactive BFP Testers Records Send Notice Enter Survey Enter Test Exit XC2

Notes:

Tester Analytics

Click the Tester Statistics/Analytics Button

XC2 Software - BFP : BFP Testers : Salvador Gray : Cert Num: 5507 : Exp Date: 04/04/2011 : 4 of 13 Selected

BFP Testers : Information System ID 100003 PERSONNEL_06-03-A

First Name: Salvador MI: Last Name: Gray	Tester Address	
Salutation: Mr. Position:	Address 1: 8782 Main Street	
Full Name: Salvador Gray	Address 2:	
Company: Whistler Testing Services	City/ST/Zip: Snoqualamish WA 98215	
Type: Code/Initials: HG	Phone: (696) 239-0602 FAX: (696) 239-5073	
Status: Status 1 Employee Num:	Cellular: (696) 240-4661 Pager:	
Driver License #: Sched Code:	E Mail:	

Certified for:	Certification #	Certified By	Cert Date	Cert Exp Date
Testing <input checked="" type="checkbox"/>	5507		04/04/2008	04/04/2011
Surveys/Insp <input checked="" type="checkbox"/>			/ /	/ /
Installations <input checked="" type="checkbox"/>			/ /	/ /
Repairs <input checked="" type="checkbox"/>			/ /	/ /

Local Registration Info	Personnel Status Fields
Reg Num:	<input type="checkbox"/> Inactive (Warning)
Reg Date: / /	<input type="checkbox"/> Inactive - Permanent
Reg Exp Date: / /	<input type="checkbox"/> Personnel UD CB 01
Reg Amt:	<input type="checkbox"/> Personnel UD CB 02

BFP Type Certification: On Authorized List Not on Public List
 Resp. Managing Employee

UD Alpha 1: UD Alpha 2: Load Signature

Test Kits	Licenses/Certifications	Test History	Notices	Other History	Companies
Mfr	Model	Serial #	Cert Date	Cert Due	
Ilt Barton	247	Wwsqa Qq	12/03/2009	12/03/2010	Arbuckle Lo
Duke	Ez-900	23455434	07/23/2008	07/23/2009	Arbuckle Lo
Astra-Promaster	Asrp-4	7U897	11/29/2009	11/29/2010	Benedictine

Comments: **Tester Statistics/Analytics** Photo

Buttons: Add Test Kit, Delete Test Kit, View Test Kit, Expand List, Expand Comments, Paste from Clipboard, User Defined, Additional Cert Info, Click Load From File

Footer: XC2 Picts, Secure Comments, Insurance Info, Module Mgr, New, Search, Print, Cancel, Save

Notes:

Analytics Screen

The Tester Analytics Screen will appear

Click OK when complete

Tester Statistics : Salvador Gray : 5507 : HG

Tester Analytics

Statistics for: **Salvador Gray** **5507** **HG**

Date Range: To:

Work Task	Count
Initial Tests	38
Final Tests	4
Repairs	17
Installations	1
Initial Surveys	9
Followup Surveys	
Other	

Notes:

Work over a period of time

If you would like to look at the work performed over a period of time, you may enter a date range at the top of the screen.

The Count will automatically reflect the work performed in that date range.

Click OK when you are finished.

Tester Statistics : Salvador Gray : 5507 : HG

Tester Analytics

Statistics for: **Salvador Gray** **5507** **HG**

Date Range: **01/01/2014** To: **10/31/2014** **Show All**

Work Task	Count
Initial Tests	2
Final Tests	1
Repairs	1
Installations	
Initial Surveys	
Followup Surveys	
Other	

OK

Notes:



XC2 User Manual

Test Kits

- **Test Kit Overview**
- **Adding New Test Kit from Main Screen**
- **Adding New Test Kit from Tester Record**
- **Adding New Test Kit from Test Company Record**



XC2 Software Knowledge Base



Overview Test Kit Screen

KB Asset ID: 3636

This page is an overview of XC2's Test Kit Screen

XC2 Test Kit Screen

This is the front page of a test kit record in XC2

This is where the follow information can be entered

- 1) Default Tester
- 2) Default Testers Company
- 3) Calibration information
- 4) Serial Number information
- 5) Accuracy information

There are also other tabs that provide additional information

- 1) Calibration History
- 2) Test History
- 3) Full Company information
- 4) User Defined Fields Area

The Next Pages will go over these fields in a little more detail

XC2 Software - BFP : Test Kits : MIKE KIDD: Model #: EZ-900 : SN #: 23455434 : 20 of 25 Selected : WEB SERVER ON : 80 : WEB BFP Test

Test Kits Information | Tester Company Information | User Defined | Calibration History | Notification History | Test Kits Test History

Test Kits : Information Inactive No 100054 TEST_EQUIP_02_BFP_GL_01

Send Notice/Communication

Other Information

Test Kit Code 100054

Certification #

Purchase Date

Issue Date

User Defined 01

User Defined 02

User Defined 03

Comments

abc123

Load from Scanner | XC2 Picts | New | Search | Print | | Cancel | Save

Notes:



How to Create A New Test Kit Record

KB Asset ID: 3282

This page describes how to create a new test kit record in XC2 Backflow.

Test Kits

Your list of test kits can be accessed from XC2's Main Page

XC2 Software - BFP : City of Snoqualamish, WA : * Test Kits: 23 of 23 Records : Multi-Line

User Options Add Delete Find Sort Show All Export Saved Search Report

Quick Lookups [r] Test Kits 23 of 23 Records

#	Serial Number	Manufacturer	Model	Calibration Date
8	646996	DUKE/BARTON	226A-BFT	06/02/10
9	Wwsqa Qq	ITT BARTON	247	09/23/15
10	23455434	DUKE	EZ-900	07/23/08
11	7U897	ASTRA-PROMASTER	ASRP-4	11/29/09
12	435	MERIAM	1126	10/04/08
13	343212	CONBRACO	40-200-TK5	07/20/08
14	3490001	FLOMATIC	TK1	06/02/10
15	Yuy676	FEBCO	825TK	08/13/14
16	6565654321	BACKFLOWGAUGE.COM	ABC123	06/02/10
17	1599987	MIDWEST	845-5	12/25/09
18	99999999	MID-WEST	860	05/27/10
19				
20	99999	MID-WEST	835	07/08/09
21	88888	WATTS	TK9A	07/08/10
22	303883	CONBRACO	40-200-TK5	07/08/10
23	8585	Astra-Promaster	ASRP-4	05/24/16

Run Selected Lookup

Automatic Reminders

Overdue Notices

Overdue Tests

Failed Assemblies

Unprinted Test Report Results

Tests Due Lookup

Favorite Tasks

Mailing Addresses List

Tester Company List

Test Kits List

BFP Notice History List

Test History

Facility Survey History List

Notice Setup

Customize Favorite Tasks

Selection ... Filter On Exclude Inactive Test Kits Records Send Notice Enter Survey Enter Test Exit XC2

Notes:

Create New Kit

To Create a new Kit click Add

The screenshot shows the 'Test Kits' window in XC2 Software. The window title is 'XC2 Software - BFP : City of Snoqualamish, WA: * Test Kits: 23 of 23 Records : Multi-Line'. The interface includes a menu bar with 'Add', 'Delete', 'Find', 'Sort', 'Show All', 'Export', 'Saved Search', and 'Report'. Below the menu bar is a 'Quick Lookups' section with a 'Test Kits' link. A table of test kits is displayed with columns for '#', 'Serial Number', 'Manufacturer', 'Model', and 'Calibration Date'. The 'Add' button is highlighted with a red box, and a red arrow points to it from the right. The table contains 23 records, with the 13th record (Serial Number 343212, Manufacturer CONBRACO, Model 40-200-TK5, Calibration Date 07/20/08) highlighted in blue. At the bottom, there are buttons for 'Send Notice', 'Enter Survey', 'Enter Test', and 'Exit XC2', along with a 'Filter On' checkbox and a 'Send Notice' button.

#	Serial Number	Manufacturer	Model	Calibration Date
8	646996	DUKE/BARTON	226A-BFT	06/02/10
9	Wwsqa Qq	ITT BARTON	247	09/23/15
10	23455434	DUKE	EZ-900	07/23/08
11	7U897	ASTRA-PROMASTER	ASRP-4	11/29/09
12	435	MERIAM	1126	10/04/08
13	343212	CONBRACO	40-200-TK5	07/20/08
14	3490001	FLOMATIC	TK1	06/02/10
15	Yuy676	FEBCO	825TK	08/13/14
16	6565654321	BACKFLOWGAUGE.COM	ABC123	06/02/10
17	1599987	MIDWEST	845-5	12/25/09
18	99999999	MID-WEST	860	05/27/10
19				
20	99999	MID-WEST	835	07/08/09
21	88888	WATTS	TK9A	07/08/10
22	303883	CONBRACO	40-200-TK5	07/08/10
23	8585	Astra-Promaster	ASRP-4	05/24/16

Notes:

Start with the top

I find the best way to enter information is to start with the basic information first

- Tester
- Company
- Serial
- Manufacture
- Model

The screenshot shows the 'XC2 Software - BFP: New Record For: Test Kits' window. The 'Information' tab is selected. The 'Tester' and 'Tester Company' fields are highlighted in yellow and enclosed in a purple box. A red arrow points from the 'Other Information' section back to this box. The 'Other Information' section includes fields for Test Kit Code (100119), Certification #, Purchase Date, Issue Date, and three User Defined fields. The bottom of the window has buttons for 'XC2 Picts', 'New', 'Search', 'Print', navigation arrows, 'Cancel', and 'Save'.

Notes:

Calibration information

Next Enter Calibration date and calibration due date

The screenshot shows the 'XC2 Software - BFP : New Record For: : Test Kits' window. The 'Test Kits Information' tab is active. The 'Test Kits : Information' section includes fields for Tester (IAN SAXTON), Tester Company (CABODS BACKFLOW 2), Serial Number (55874), Manufacturer (Barton), and Model (246). A red arrow points to the 'Default Test Kit for' checkbox. The 'Calibration Information' section is highlighted with a red box and contains fields for Calibration Date, Calibration Due, and Cost (\$0.00). The 'Other Information' section includes Test Kit Code (100119), Certification #, Purchase Date, Issue Date, and three User Defined fields. The 'Accuracy Information' section includes Accuracy Date, Accuracy Due Date, Accuracy Valid By, Accuracy Certif., and radio buttons for Passed and Failed. A 'Comments' section with a 'Date' field is at the bottom right. The window has a standard toolbar at the bottom with buttons for 'XC2 Picts', 'New', 'Search', 'Print', navigation arrows, 'Cancel', and 'Save'.

Notes:

Enter More or Save

If you need or want to track more information go ahead and add what you need

Click Save when you are finished

XC2 Software - BFP : New Record For: : Test Kits

Test Kits Information Tester Company Information User Defined Calibration History Notification History Test Kits Test History

Test Kits : Information Inactive No 100119 TEST_EQUIP_02_BFP_GL_01

Tester: IAN SAXTON ID: 00-0000000
Tester Company: CABODS BACKFLOW 2 ID: 00-0000000
Serial Number: 55874
Manufacturer: Barton
Model: 246

Default Test Kit for ID: 00-0000000

Calibration Information
Calibration Date: 05/27/2016 Cost: \$0.00
Calibration Due: 05/27/2017
Calibrated By: [dropdown]
Test Kit Status: [dropdown]
Sched Code: [dropdown]

Accuracy Information
Accuracy Date: / / Passed Failed
Accur. Due Date: / /
Accuracy Valid By: [text]
Accur. Certif.: [text]

Send Notice/Communication

Other Information
Test Kit Code: 100119
Certification #: [text]
Purchase Date: / /
Issue Date: / /
User Defined 01: [text]
User Defined 02: [text]
User Defined 03: [text]

Comments Date

XC2 Picts New Search Print [back] [forward] Cancel **Save**

Notes:

You have created a New test kit

#	Serial Number	Manufacturer	Model	Calibration Date
	8585	Astra-Promaster	ASRP-4	05/24/16
	7U897	ASTRA-PROMASTER	ASRP-4	11/29/09
	6565654321	BACKFLOWGAUGE.COM	ABC123	06/02/10
	55874	Barton	246	05/27/16
	343212	CONBRACO	40-200-TK5	07/20/08
	303883	CONBRACO	40-200-TK5	07/08/10
	23455434	DUKE	EZ-900	07/23/08
	646996	DUKE/BARTON	226A-BFT	06/02/10
	Yuy676	FEBCO	825TK	08/13/14
	3490001	FLOMATIC	TK1	06/02/10
	Wwsqa Qq	ITT BARTON	247	09/23/15
	435	MERIAM	1126	10/04/08
	45678	MID-WEST	830	06/02/10
	9	MID-WEST	830	02/09/10
	6546544	MID-WEST	830	06/02/10
	888888	MID-WEST	830	02/09/10

Notes:



XC2 Software Knowledge Base



Adding New Test Kit From a Tester Record

KB Asset ID: 3637

This page describes how to add a new test kit form inside of a tester record.

Open a Tester Record

Search for a tester record

and open the tester that you would like to add a test kit.

The screenshot shows the XC2 software interface with the following details:

- Window Title:** XC2 Software - BFP : City of Snoqualamish, WA : * BFP Testers: 1 of 23 Records : Multi-Line : WEB SERVER ON : 80 : WEB BFP Test
- Search Bar:** Find: Personnel Full Name (highlighted in purple), East
- Table:**

#	Full Name	Cert Number	Cert Exp Date	Company Name	Testi
1	EASTLAND ROB	22365	03/10/19	FLIM FLAM TESTING	
- Left Sidebar:** Favorite Tasks list with 'BFP Testers List' highlighted in purple.
- Bottom Bar:** Selection ... Filter On Exclude Inactive BFP Testers Records

Notes:

Test Kit Record

To add a test kit, make sure that the test kit tab is selected

Click Add Test Kit to create a new kit

Notes:



XC2 Software Knowledge Base



Adding New Test Kit Models

KB Asset ID: 2656

By default, XC2 has a variety of Test Kit Models Pre Loaded into XC2. If you find a model that is not currently Loaded, you may add a Test Kit record manually.

Adding a Test Kit

You can add a New Test Kit Model through the Resources menu.

Click Lookup/Setup Lists

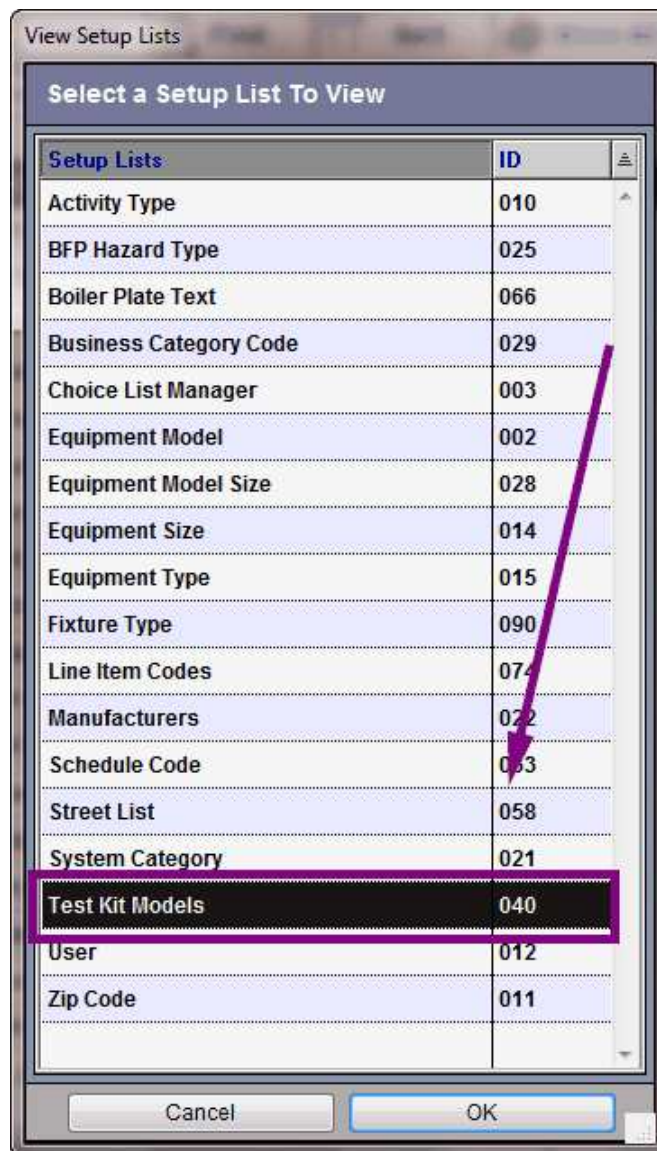
The screenshot shows the XC2 software interface. The main window displays a table of facilities with columns for #, Facility Name, Sub Div, Service Address, and another Service Address. The table contains 20 rows of data. On the left side, there is a sidebar menu with various options. The 'Lookup/Setup Lists' option is highlighted with a red box and a red arrow points to it. The top of the window has a menu bar with options like Add, Delete, Find, Sort, Show All, Export, Saved Search, and Report. Below the menu bar, there are search and filter options.

#	Facility Name	Sub Div	Service Address	Service Address
1	Bogus		99999 Test Street Name	San Francisco
2	BRONGA, NICOLE	DUNHILL UNIT 1	111 DALTON DR	Oviedo
3	MILLER, PATRICIA	HYDE PARK	3177 BATTERSEA WAY	Winter Park
4	ECHVARRIA, ALMA	BELLE MEADE UNIT 2	4011 GALLAGHER LOOP	Casselberry
5	PIPER, JEFFREY & KIMBERLY	TUSKA RIDGE UNIT 3	1174 HOLLOW PINE DR	Oviedo
6	GUERRIERI, JANET	WYNTREE	733 PRESERVE TER	Lake Mary
7	BAERENKLAU, ALAN	BURLINGTON OAKS	1633 KERSLEY CIR	Lake Mary
8	GIEDD, BRAD S	BALLENTYNE	3626 SUPREME CT	Apopka
9	MESSNER, STEPHEN & SUSAN	ESTATES AT ALOMA WOODS PH 2	5712 OAK LAKE TRL	Oviedo
10	BERMAN, KELLY	BERINGTON CLUB PH 3	331 SAVANNAH HOLLY LN	Sanford
11	VOORHEES JR. DELLOYD	LAKE FOREST SEC 6A	5408 FAWN LAKE CT	Sanford
12	WHITTMER, SCOTT M		1550 BAYWATER CT	LAKE MARY
13	ROBERTS, WAYNE DOUG	HARBOUR LANDING	3016 HARBOUR LANDING WAY	Casselberry
14	JONES, JACQUELINE A	AMBERWOOD UNIT 1	1560 SUGARWOOD CIR	Winter Park
15	MCKINNEY, DANIEL J	DEER RUN UNIT 15	4248 FOX HOLLOW CIR	Casselberry
16	LESTER, CONNIE L.	DUNHILL UNIT 1	147 DALTON DR	Oviedo
17	LUDEWIG, CARL & DEBRA	DUNHILL UNIT 2	490 MOFFAT LOOP	Oviedo
18	BANKS, DONALD C	HOWELL ESTATES REPLAT	1043 MANCHESTER CIR	Winter Park
19	SAYAVONG, MONA MARIA	HOWELL ESTATES 1ST ADD	1056 MANCHESTER CIR	Winter Park
20	MCSWEENEY, JAMES	HOWELL COVE 3RD SEC	3516 SEAFORD LN	Casselberry

Notes:

Test Kit Models

Double Click Choice Test Kit Models

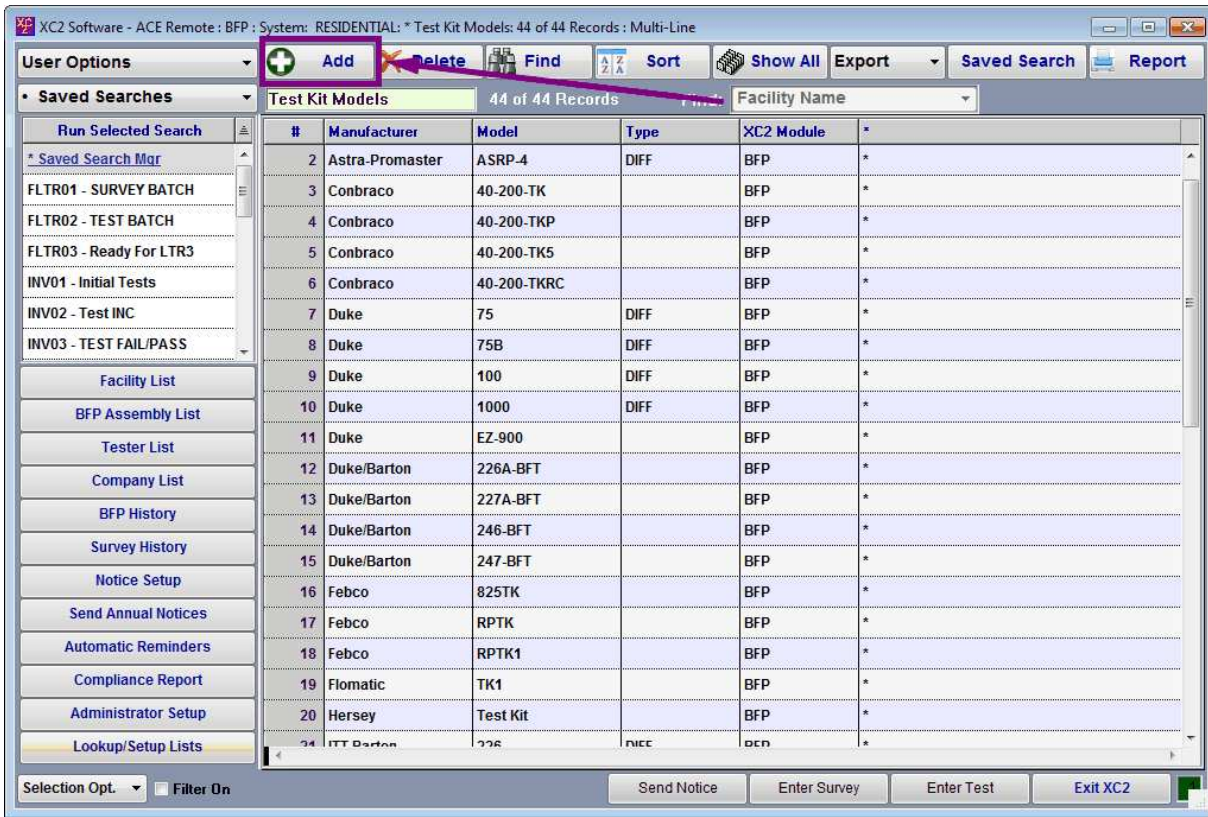


Notes:

List View of Test Kit Models

A List View of all Test Kit Models will appear as a List View

To Add a New Model click Add



Notes:

New Model

After Clicking Add a Blank test kit records will appear

- Choose a Manufacture
- Model
- Type
- Comments

XC2 Software - BFP : New Record For: : Test Kit Models

Test Equipment Models N° 100049 TESTKITMOD.01

Manufacturer		Model	
Type		<input checked="" type="radio"/> Mechanical <input type="radio"/> Electronic	
	XC2 Module	BFP	

Comments

Duplicate

New Search Print |< < > >| Cancel Save

Notes:



XC2 Software Knowledge Base



Update Test Kit Calibration

KB Asset ID: 3638

This page describes how to update individual test kit calibration information in XC2.

Search For Test Kit

Search for the Test Kit and open the Record

The screenshot shows the XC2 software interface with the following details:

- Window Title: XC2 Software - BFP : City of Snoqualamish, WA: * Test Kits: 2 of 25 Records : Multi-Line : WEB SERVER ON : 80 : WEB BFP Test
- Toolbar: Add, Delete, Find, Sort, Show All, Export, Saved Search, Report
- Search Results: 2 of 25 Records
- Table Columns: #, Serial Number, Manufacturer, Model, Calibration Date, XC2Live ID
- Table Data:

#	Serial Number	Manufacturer	Model	Calibration Date	XC2Live ID
1	123	MID-WEST	860	11/27/16	
2	123456	Watts	TK99E	05/25/16	
- Favorite Tasks Menu: BFP Assembly List, BFP Testers List, Tester Company List, **Test Kits List** (highlighted with a red arrow), Test History, Facility Survey History List, Notice Setup
- Bottom Bar: Selection ..., Filter On, Exclude Inactive Test Kits Records (checked), Send Notice, Enter Survey, Enter Test, Exit XC2

Notes:

Calibration

Calibration information is located inside of the test kit record

Simply replace the new calibration date and XC2 will automatically change the next date.

The screenshot shows the 'Test Kits Information' tab in the XC2 Software. The 'Calibration Information' section is highlighted with a purple box and a purple arrow pointing to the 'Calibration Date' field. The 'Calibration Date' is 11/27/2016, and the 'Calibration Due' date is 11/27/2017. The 'Test Kit Code' is 100031. The 'Tester' is ENRICO ALBINONI, and the 'Tester Company' is CITY OF SNOQUALAMISH. The 'Manufacturer' is Mid-West, and the 'Model' is 860. The 'Default Test Kit for' is ENRICO ALBINONI. The 'Accuracy Information' section includes fields for Accuracy Date, Accur. Due Date, Accuracy Valid By, and Accur. Certif. The 'Other Information' section includes fields for Certification #, Purchase Date, Issue Date, and User Defined 01, 02, and 03. The 'Comments' section contains the text 'test kit is blue and silver'.

Notes:



XC2 User Manual

Entering Tests

- **Entering Test from Main Screen**
- **Enter Test from Facility - Quick Test Entry**
- **Entering Test from Assembly Record**
- **Importing Scanned Images during Test Entry**
- **Enter Tests - Pass or Fail Only**



XC2 Software Knowledge Base



How to Enter Test From Main Screen

KB Asset ID: 2945

This page will show you the quickest way to enter a backflow assembly test into XC2

[Click Enter Test](#)

On the lower right corner of the Main Screen click Enter Test.

The screenshot shows the XC2 software interface for BFP Assembly records. The main window displays a table with columns: #, Assy ID, Facility Name, Last Status, Addr (#), Street, and Nex. The table contains 17 records, with record 9 (Assy ID 2004664, Rainbow Rebuilders) highlighted in blue. The interface includes a top menu bar with options like Add, Delete, Find, Sort, Show All, Export, Saved Search, and Report. On the left, there are sections for 'Use Selected List View' and 'Favorite Tasks'. At the bottom, there are buttons for 'Send Notice', 'Enter Survey', 'Enter Test *' (highlighted with a red box and a red arrow), and 'Exit XC2'.

#	Assy ID	Facility Name	Last Status	Addr (#)	Street	Nex
8	2004665	Rainbow Rebuilders		6694	Abbotsford	
9	2004664	Rainbow Rebuilders		6694	Abbotsford	
10	2004657	Seniors in Community Living Inc		9095	Greyson	
11	2000287	Seniors in Community Living Inc	FAIL	9095	Greyson	
12	2000295	Littleton Garage Door Service	FAIL	6669	Scottwood	
13	2000344	Rainbow Rebuilders	FAIL	123	West	
14	2000469	Sheridan Sanitation District #2	FAIL	7022	Ryan Meadow	
15	2000621	Tafoya Electric	FAIL	1795	Church View	
16	2001590	Captain's Chair	FAIL	3557	Lawton	
17	2002529	A-Quest Electronics	FAIL	5289	Preston Mill	

Notes:

Choose the search field

Choose the search field you would like to use
The two most common are

- 1) Facility Name
- 2) Serial Number

The screenshot shows the 'XC2 Software - BFP : Enter New Test Results' window. The 'BFP Search' section at the top has a 'Test Code' dropdown set to 'PASS'. A 'Search Field' dropdown menu is open, showing options: 'Facility Name', 'Service Address Num Alpha', 'Service Address Street Name', 'Equipment Serial Num', and 'Meter Number'. A purple box highlights this dropdown, and a purple arrow points to 'Equipment Serial Num'. Below the search fields are input boxes for 'Mfr', 'Serial Number', 'Type', 'Size', 'Model', and 'Location'. The main test area is divided into columns for 'Check Valve #1', 'Check Valve #2', 'Relief Valve', and 'Shut-Off #1 & #'. Each column has 'Held At' and 'Opened At' fields, and checkboxes for 'Closed Tight', 'Leak', 'Failed', 'Cleaned', and 'Leaked'. The 'Tester' section includes 'Tester Name', 'Company Name', 'Pass/Fail', and 'Date' fields. At the bottom, there are buttons for 'Report Options', 'Replace Device', 'View History', 'Signature', and 'Charges'.

Notes:

Search For the Assembly

Search for the assembly that you would like to enter the test for.

The screenshot shows the 'Enter New Test Results' window. The search field 'Equipment Serial Num' contains the value '123'. The test code is 'PASS'. The interface includes a table for recording test results for different valves and a bottom section for tester information and charges.

Notes:

Multiple Assemblies

If multiple assemblies are found, select the correct assembly

BFP Assembly List

Select a : BFP Assembly Record LIST.01

#	Facility Name	Addr. 2	Street	Serial Num	Equip Location	Type	Last Test	Next Test
1	Seniors in Commur		Greyson	123456543		DC	11/29/2011	
2	Taylors Liquors		Perkins	123091		AVB	04/12/2011	05/25/2
3	A-Quest Electronics		Preston Mill	123911		RP	12/01/2011	
4	Bethesda At St Anti		Woodcreek	12333323		DC		07/31/2

Notes:

Enter the Test

If you have more tests to enter

Click Save and New

If you are done

Click Save and Done

XC2 Software - BFP : Bethesda At St Anthony Hospital North : Location ID: 100045 : PASS :

BFP Search Test Code **PASS** Type Ahead "Begins with" Search "Contains" Search

Search Field: **Equipment Serial Num** Search Value: **12333323**

Assembly ID No: 2004678 Last Test Date: Mfr: Watts Serial Number: 12333323

Facility: Bethesda At St Anthony Hospital North Type: DC Size: 3/4" Model: 719QTR10-VU

Address: 1802 Woodcreek Pl - Snoqualiamish Location:

10th USC Edition	Check Valve #1	Check Valve #2	Shut-Off #1 & #	
QK_BFP_TEST_02	Held At: 8 <input checked="" type="checkbox"/> Closed Tight <input type="checkbox"/> Leak <input type="checkbox"/> Failed <input type="checkbox"/> Cleaned	Held At: 5 <input checked="" type="checkbox"/> Closed Tight <input type="checkbox"/> Leak <input type="checkbox"/> Failed <input type="checkbox"/> Cleaned	Closed: <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Initial Test			Leaked: <input type="checkbox"/>	<input type="checkbox"/>
			Meter Stop: <input type="checkbox"/>	<input type="checkbox"/>
			Cleaned: <input type="checkbox"/>	<input type="checkbox"/>

Tester: Tester Name: Ivory Edwards Company Name: Jimbo's Better Backflow Pass/Fail: Pass Date: 06/22/2015

Report Options:

Charges: Initial: 50 Final: Repair: Parts: Totals: \$50.00 Don't Calculate

Buttons:

Notes:

What Happens if I click Save and New?

If you click Save and New, you will be asked to confirm the correct next test due date.

Next Test Due Date

Confirm Next Test Date

Confirm The Next Test Date!

This Test Date: 06/22/2015

Previous Test Due: 07/31/15 Test Frequency: 12 Month

Next Test: 2017

New "Next Test Due Date": 07/31/2016   

Next Test: 2015

a 07-Jul

Return To Test Results Apply Next Test Date

Notes:

After Confirmation

After the test confirmation, XC2 will bring you back to the test entry page. Enter your next test.

The screenshot shows the 'Enter New Test Results' window in XC2 Software. The window title is 'XC2 Software - BFP : Location ID: : Enter New Test Results : 1 of 1 Selected'. The interface is divided into several sections:

- Search Section:** Includes 'BFP Search' with a dropdown menu, 'Test Code' set to 'PASS', and 'Search Field' set to 'Equipment Serial Num'. There are also search options for 'Type Ahead', 'Begins with', and 'Contains', along with a 'Go!' button.
- Form Fields:** Fields for 'Assembly ID', 'Facility', 'Address', 'Mfr', 'Serial Number', 'Type', 'Size', and 'Model' are present.
- Test Results Table:** A table with columns for '10th USC Edition', 'Check Valve #1', 'Check Valve #2', 'Relief Valve', and 'Shut-Off #1 & #'. Each column contains specific test parameters and status checkboxes (e.g., 'Held At', 'Closed Tight', 'Leak', 'Failed', 'Cleaned', 'Opened At', 'Did Not Open', 'Leaked', 'Meter Stop', 'Cleaned').
- Tester Information:** Fields for 'Tester' (with an 'Initial' button), 'Tester Name', 'Company Name', 'Pass/Fail' (set to 'Pass'), and 'Date'.
- Buttons and Options:** Includes 'Report Options', 'Replace Device', 'View History', 'Signature', and a field containing '01-1037586'.
- Comments and History:** A 'Comments' section with an 'Expand' button and a text area, and 'History UD 01' and 'History UD 02' fields.
- Charges Section:** Fields for 'Initial', 'Final', 'Repair', 'Parts', and 'Totals', with a 'Don't Calculate' checkbox.
- Footer Buttons:** A row of buttons: 'Entry Information', 'Line Items', 'Edit Device Info', 'XC2 Picts', 'Save & Print', 'Save & Done', 'Cancel', and 'Save & New'.

Notes:



XC2 Software Knowledge Base



Quick Test Entry for All Backflow Assemblies at a Facility

KB Asset ID: 2159

This feature allows for quickly entering test results for all backflow assemblies at a given facility all at once. Note: Your settings must be configured for entering Pass or Fail tests only, no PSID values.

Select a Facility

Double Click on the Facility Record

Facility List

XC2 Software - BFP : * Facility: 2000 of 16662 Records : Multi-Line

User Options + Add X Delete Find Sort Show All Export Saved Search Report

Resources and Pick Li... Facility 2000 of 16662 Records Find: Facility Name Go!

#	Facility Name	Addr (#)	Addr	Street	Customer Code	Tester Code
1	NC General Assembly	16	16	W Jones St	J4UY-6129	A3CU-2573
2	Rec Zone	912	912	Hodges St	C7PT-5714	BCGC-1848
3	First Citizens Bank	239	239	Fayetteville St	V4PV-8484	W7PT-3641
4	Commerce Bldg	19	19	W Hargett St	C1CB-9619	XDR8-8857
5	Harrington Place	510	510	S Harrington St	T9M2-4732	9LHH-1194
6	Legends	330	330	W Hargett St	PQCX-9188	DLWS-9816
7	Landmark	117	117	E Hargett St	QJRL-1427	CAWN-7553
8	Ratio Archetects	135	135	E Martin St	Q3KJ-8816	MCYP-4154
9	ABE Utilities	3040	3040	Woods pl	KKYT-6269	GGY-1416
10	ABE Utilities	3030	3030	Woods pl	J3SQ-2684	9XYB-5458
11	ABE Utilities	3050	3050	Woods pl	DGSD-8535	GK9F-5873
12	ABE Utilities	3060	3060	Woods pl	9AD8-9153	UWY7-8338
13	Goodwill Industries	321	321	W Hargett St	W1K8-3865	R6HH-4619
14	ABC Cornershop Inc	237	237	S Wilmington St	JXHS-8113	CRYQ-8926
15	SHOPS AT BATTLE BRIDGE	6209	6209	ROCK QUARRY I	F19S-8465	RXY7-8714
16	North Hill Mall	4351	4351	Main @ North Hill	T77N-5525	WNEF-5482
17	EMCOR Services	4505	4505	Falls of Neuse	U69J-6528	LARL-4387
18	Residence Inn	1001	1001	NAVAHO DR	PNEX-6691	PLPR-8718

Filter Facilities w/out Backflow User: 1

Notes:

Click the Button: Quick Test Entry

Facility Entry Screen

XC2 Software - BFP : Facility : NC General Assembly : 16 W Jones St : 1 of 2000 Selected

Facility Information | Custom Fields | Comments | Exp

Facility Information | Mailing Addresses | Owner Addresses | Property Manager

Facility Address Info | Make Same As Mailing | Facility ID No: 200012

Facility Name: NC General Assembly
 Facility Name 2:
 Service Addr: 16 | Street: W Jones St
 Addr. 2: | Addr. Unit: |
 City ST Zip: Raleigh | State: NC | Zip: 27601
 Contact Name: | Last: |
 Position: | Cell: |
 Phone: | Ext: | Emerg Phone: |
 EMail Address: |

Facility ID No: 200012
 Premise Num: 2396710000
 Customer Code: J4UY-6129 | For Customer
 Tester Code: A3CU-2573 | For Tester
 Group Code: |
 Acct Number: | Seq: |
 Parcel Number: |
 Last Survey Date: / / | Freq. [mos.]: 0
 Next Survey Date: / / | FACILITY_06.1
 Map Page: |

Service Type: F | Assigned Inspector: |
 Facility Type: | Auth. Tester Company: | Address Options
 Facility Status: | SIC Code: | Update Options
 Mail Same as Service: False | Sep Irrig Meter: | Meter & GPS Info

#	Serial Num	Type	Size	Mfr	Next Test	Last Test	Active	Count	Status	Service Address	Equip Location
1	683898	F	3/4"	Wilki			✓	Y	Instal	16 W Jones St	Basement rm
2	103811	RP	8"	Watt	10/01/13		✓	Y	Instal	16 W Jones St	Cliset off 10a

Quick Test Entry | Enter New Test | New BFP Assembly | Send Notice | Delete Item | View BFP Assembly | Expand List

Pictures/Site Map | Google Maps | Qty BFP: 25 | Add Facility | Search | Report/Print | Cancel | Save

Notes:

Enter the Test Results for all backflow assemblies

This is the quick test entry screen. To enter tests you need to enter the following information into the fields.

- Select the Tester
- Select the Test Date
- Select the Test Kit Used
- Determine the Next Test Date
 - Individually per assembly
 - or make all next test dates the same
- Show the backflow assemblies for a specific time frame or show all for this facility

Check the column: Pass or Fail depending upon the test results
F/P means "Fail/Pass" - i.e. it failed the initial and passed the final test.

Click the "Save" Button when you are done.

All tests will be entered at once for these assemblies at this location.

Quick Test Entry Screen

Backflow Test Entry List

Test Report - Entry By List NC General Assembly : 16 W Jones St

Tester Name: Adam Stevens Company Name: Precision Plumbing Co Inc Date: 12/12/2013 Test Kit / Gauge: 0070236

Use This Next Test Date: 12/12/2014 Set Each Next Test Date Individually

Show All Not Tested In Last: 6 Months

#	Pass	Fail	F/P	Serial #	Location	Type	Address	Acct	Due	Last	Next
1	✓			683898	Basement rm 14A	RP	16 W Jones St				12/12/2014
2	✓			103811	Closet off Loading Do	RP	16 W Jones St		10/01/2013		12/12/2014
3	✓			129886	Basement	RP	16 W Jones St		10/01/2013		12/12/2014
4	✓			130392	Basement	DC	16 W Jones St		10/01/2013		12/12/2014
5	✓			130388	Fire Line Bypass (BA	DCDA	16 W Jones St		10/01/2013		12/12/2014
6	✓			103152	Fire Line (BASEMENT	DCDA	16 W Jones St		10/01/2014	07/03/2013	12/12/2014
7	✓			693898	Basement	RP	16 W Jones St		10/01/2013		12/12/2014
8	✓			no plate	Basement	RP	16 W Jones St		10/01/2013		12/12/2014
9	✓			Q03515	Hot box at street	RPDA	16 W Jones St		10/01/2013		12/12/2014
10	✓			UD219	Basement	RP	16 W Jones St		10/01/2013		12/12/2014
11	✓			W117399	Ground floor mechanic	RP	16 W Jones St		10/01/2004		12/12/2014

Cancel Save

Notes:



Enter Tests From Within the Backflow Assembly Record

KB Asset ID: 3610

This page describes how to enter a backflow assembly test from within the backflow assembly record.

Search For The Backflow Assembly

Open the record by double clicking

The screenshot shows the XC2 software interface with the following details:

- Window Title:** XC2 Software - BFP : City of Snoqualamish, WA: * BFP Assembly: 1 of 123 Records : Multi-Line : WEB SERVER ON : 80 : WEB BFP Test
- Search Criteria:** Find: Facility Name, Value: hospit
- Table Data:**

#	Assy ID	Facility Name	Last Status	Addr (#)	Street
1	2003108	HOSPITALITY GROUP INC THE	FAIL	429	CALI GLEN
- Left Sidebar (Favorite Tasks):**
 - Facility List
 - BFP Assembly List** (highlighted)
 - BFP Testers List
 - Tester Company List
 - Test Kits List
 - Test History
- Bottom Buttons:** Selection ..., Filter On, Exclude Inactive BFP Assembly Records, Send Notice, Enter Survey, Enter Test *, Exit XC2

Notes:

Click Enter Test

The screenshot shows the 'Enter Test' button highlighted with a red box and a red arrow pointing to it. The interface includes various tabs like 'Acct/Address Info', 'History', 'Comments', and 'Custom Fields'. The main area contains fields for facility information, contact details, and test parameters.

Service Address Info	Mailing Addresses	Owner Addresses	Property Manager	Enter Test	Send Notice	Work Order
Facility Address Info Facility Name: HOSPITALITY GROUP INC THE Facility Name 2: Service Addr.: 429 CALI GLEN LN Addr. 2: City ST Zip: SNOQUALIAMISH WA Zip 98215 Facility Contact Info: Contact Name: ARON Last: WILSON Position: Phone: (696) 235-2476 Ext. Cell: (696) 235-3688 #2 (696) 235-3688 EMail Address: H2O_System: FIELDS FIRE PROTECTION		Type: RP Size: 3/4" Mfr: Wilkins Model: 975XLSEU-VI Serial Num: 778099 Status: Installed Next Test Due: 04/20/2016 Mo. 4 Frequency: 12 Months Last/Dflt Tester: VINCENTE PER View Last Test Date: 10/10/2010 FAIL Test Form Print Date: 10/13/2016		Assembly List <input type="checkbox"/> By Pass <input type="checkbox"/> No Images <input type="checkbox"/> No Site Map Cnt. Y		
Location ID: Meter Acct Num: Meter #: Sz: Service Type: Hazard Type: Equip Location:		Map Page: Material: UD Date 5: UD Date 6: Haz. Level:		Inst/Replace By: Install Date: 04/27/2008 Abv. Grade: 0 Install Due: Replacement Due Date: Inst/Replace Date: 04/27/2008 Replace Permit Num: Schedule Code: 10-Oct Protection Type: Isolation		
<input checked="" type="checkbox"/> Show Minimum Fields		Location Floor: Hazard Contaminant: Equipment Fixture Type:		<input type="checkbox"/> Inactive <input type="checkbox"/> Flood Protect <input type="checkbox"/> UD CB 1 <input type="checkbox"/> Freeze Protect <input type="checkbox"/> Confinement <input type="checkbox"/> Back Pressure <input type="checkbox"/> Cont. Pressure <input type="checkbox"/> Back Siphonage <input type="checkbox"/> Impropr. Appl <input type="checkbox"/> Impropr. Install		

Buttons at the bottom: Pictures/Site M..., MapPoint, GPS Info, Meter Info, New BFP Record, Search, Report/Print, Cancel, Save

Notes:

Enter Test

Test Results					
Test Code: PASS		Type: RP	Size: 3/4"	SN: 778099	Last Test: 10/10/2010
Mfr: WILKINS		Model: 975XLSEU-VUVU		RP Buffer: 3.0	
Equip Location: _____					
Test Method	Check Valve #1	Check Valve #2	Relief Valve	Shut-Off #1 & #2	
2 10th USC Editi Initial Test Test - Pass/Fail TEST_RPT_06_LG_01	Held At: 0 <input type="checkbox"/> Closed Tight <input type="checkbox"/> Leak <input type="checkbox"/> Cleaned <input type="checkbox"/> Failed	<input type="checkbox"/> Closed Tight <input type="checkbox"/> Leak <input type="checkbox"/> Cleaned <input type="checkbox"/> Failed	Opened At: _____ <input type="checkbox"/> Did Not Open <input type="checkbox"/> Cleaned <input type="checkbox"/> Leaked <input type="checkbox"/> Failed Air Gap OK <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Closed <input type="checkbox"/> Leaked <input type="checkbox"/> Cleaned	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Tester: Initial VINCENTE PERRY Company Name: HOME TOWN BACKFL Pass/Fail: _____ Date: _____ Test Kit / Gauge: _____					
<input type="button" value="Report Options"/> <input type="button" value="Replace Device"/>			<input type="button" value="View History"/> <input type="button" value="Signature"/> 01-1038104		
Comments: _____ <input type="button" value="Expand"/> <input type="button" value="Load from Scanner"/> <input type="button" value="Load from Disk"/> History UD 01: _____ History UD 02: _____		<input type="checkbox"/> Approve Entry		Charges: Initial _____ Final _____ Repair _____ Parts _____ Totals _____ <input type="checkbox"/> Don't Calculate	
<input type="button" value="Mod History"/> <input type="button" value="Line Items"/> <input type="button" value="Edit Device In..."/> <input type="button" value="XC2 Picts"/> <input type="button" value="Print Ctrl-P"/> <input type="button" value="Charges/Time/In..."/> <input type="button" value="Add'l Test Info"/> <input type="button" value="Import Fields"/> <input type="button" value="Cancel"/> <input type="button" value="Save"/>					

Notes:



XC2 Software Knowledge Base



XC2's Test Report Form Scanning Feature

KB Asset ID: 3591

This page describes how to use XC2's test report scanning feature to save scanned copies of your test report form in the backflow assembly record.

Saving Test Form in Record

Many people save the completed test form inside the backflow assembly record that it is associated with.

With XC2's Test Report Form Scanning Feature we have made it easier to complete this task. Below shows where to find this feature and how to use this feature.

BACKFLOW ASSEMBLY TEST REPORT FORM

City of Snoqualamish, WA

Assembly ID	2004726	Facility Name	JOHNS GRILL		
Acct Number		Meter #		Test Report Due: 03/22/2017	
Service Address	83 ELLIS ST		Schedule Code		
	SAN FRANCISCO CA 94102		Assembly Info (Replacement/Correction)		
Equip Location		SN	555		
Location ID		Protection Type	Containment	Mfr Watts	
Contact Name		Ph		Type DCDA	
Map Page		#2		Size 10"	
			Model	767NDCDABF-	
			Install Date		
			Permit Num		
<input type="checkbox"/> Confinement		<input type="checkbox"/> Freeze Protect		Hazard Type	
				Haz. Level	
02/01/2016 PASS by: NELSON BRYANT [3326] CV1: 8.0 CV2: 5.0					
Line pressure at time of test:		REPORT OF TEST RESULTS			<input checked="" type="checkbox"/> Approved BFP
	Check Valve #1	Check Valve #2	Relief Valve	PVB/SVB	Shut Off Valves
Initial Test	<input type="checkbox"/> Held at PSID	<input type="checkbox"/> Held at PSID	<input type="checkbox"/> Opened at PSID	<input type="checkbox"/> Air Inlet Opened at PSID	#1 #2
	<input type="checkbox"/> Closed Tight	<input type="checkbox"/> Closed Tight		Opened Fully Y <input type="checkbox"/> N <input type="checkbox"/>	<input type="checkbox"/> Closed Tight
Pass	<input type="checkbox"/> Leaked	<input type="checkbox"/> Leaked	<input type="checkbox"/> Did Not Open	<input type="checkbox"/> Check Held at PSID	<input type="checkbox"/> Leaked
Fail				<input type="checkbox"/> Leaked	
R E P A I R	<input type="checkbox"/> CLEANED <input type="checkbox"/> REPLACED <input type="checkbox"/> Disc <input type="checkbox"/> Spring <input type="checkbox"/> Guide <input type="checkbox"/> Seat <input type="checkbox"/> O-Ring(s) <input type="checkbox"/> Module <input type="checkbox"/> Rubber Kit	<input type="checkbox"/> CLEANED <input type="checkbox"/> REPLACED <input type="checkbox"/> Disc <input type="checkbox"/> Spring <input type="checkbox"/> Guide <input type="checkbox"/> Seat <input type="checkbox"/> O-Ring(s) <input type="checkbox"/> Module <input type="checkbox"/> Rubber Kit	<input type="checkbox"/> CLEANED <input type="checkbox"/> REPLACED <input type="checkbox"/> Disc <input type="checkbox"/> Spring <input type="checkbox"/> Diaphragm <input type="checkbox"/> Seat <input type="checkbox"/> O-Ring(s) <input type="checkbox"/> Module <input type="checkbox"/> Rubber Kit	<input type="checkbox"/> CLEANED <input type="checkbox"/> REPLACED <input type="checkbox"/> Air Inlet Disc <input type="checkbox"/> Air Inlet Spring <input type="checkbox"/> Check Disc <input type="checkbox"/> Check Spring <input type="checkbox"/> Float <input type="checkbox"/> Diaphragm <input type="checkbox"/> Rubber Kit	<input type="checkbox"/> CLEANED <input type="checkbox"/> REPLACED <input type="checkbox"/> REPAIR
Other/Notes:					
Final Test	<input type="checkbox"/> Closed Tight PSID	<input type="checkbox"/> Closed Tight PSID	<input type="checkbox"/> Opened at PSID	Opened Fully Y <input type="checkbox"/> N <input type="checkbox"/> Air Inlet PSID	<input type="checkbox"/> Closed Tight
	<input type="checkbox"/> Closed Tight	<input type="checkbox"/> Closed Tight		CK Valve PSID	<input type="checkbox"/> Pass
THE ABOVE REPORT IS CERTIFIED TO BE TRUE: 1A					
Initial Test By	Certificate	Test Date:	Gauge Num.	Company	Phone
BOB EASTLAND	558				
Final Test By					
Repair By					

Enter a Test

The Scanning Feature can be found on the main test entry page.

Get to the test entry screen.

The screenshot shows the XC2 Software interface for the City of Snoqualamish, WA. The window title is "XC2 Software - BFP : City of Snoqualamish, WA: * Facility: 88 of 88 Records : Multi-Line : WEB SERVER ON : 80 : WEB BFP Test". The main area displays a table of 88 records for facilities. The table has columns for #, Facility Name, Addr (#), Street, Site Qty, and Sched Code. A red arrow points to the "Enter Test" button in the bottom right corner of the interface.

#	Facility Name	Addr (#)	Street	Site Qty	Sched Code
35	HOSPITALITY GROUP INC THE	429	CALI GLEN	1	10-Oct
36	JOHNS GRILL	63	ELLIS	1	
37	LA SALLE PARTNERS	5622	STERLING GLEN		02-Feb
38	LABRIOLA MACHINE	1577	MEADOW ASH	1	01-Jan
39	LAMAR VENTURES	2941	ADARA		12-Dec
40	LANYON SPRINKLER CO	4709	PRAIRIE RUN	2	06-Jun
41	LITTLETON GARAGE DOOR SERVICE	6669	SCOTTWOOD	1	01-Jan
42	MANN ROBERT ORIENTAL ----- CHANGE	1637	KETTERINGTON	1	07-Jul
43	MATTRESS FACTORY THE - ---% % % % % % % % % % % %	6732	OLDE DUBLIN WOODS	1	11-Nov
44	MERCER WILLIAM M INCORPORATED	5707	CHATHAM	1	01-Jan
45	METRO DISHWASHER	3557	LAWTON		09-Sep
46	MEX IMPORTS - CHANGE	6471	CHANT	1	12-Dec
47	MIDWEST SALES CO	4557	FRANK		02-Feb
48	MILE HIGH LOUNGE -----CHANGE	7002	VILLAGE GREEN	1	07-Jul
49	MR SMITH'S RESTAURANT	4370	ROBIN HOOD	1	08-Aug
				119	

Notes:

Load from scanner

On the test entry screen click

Load from Scanner

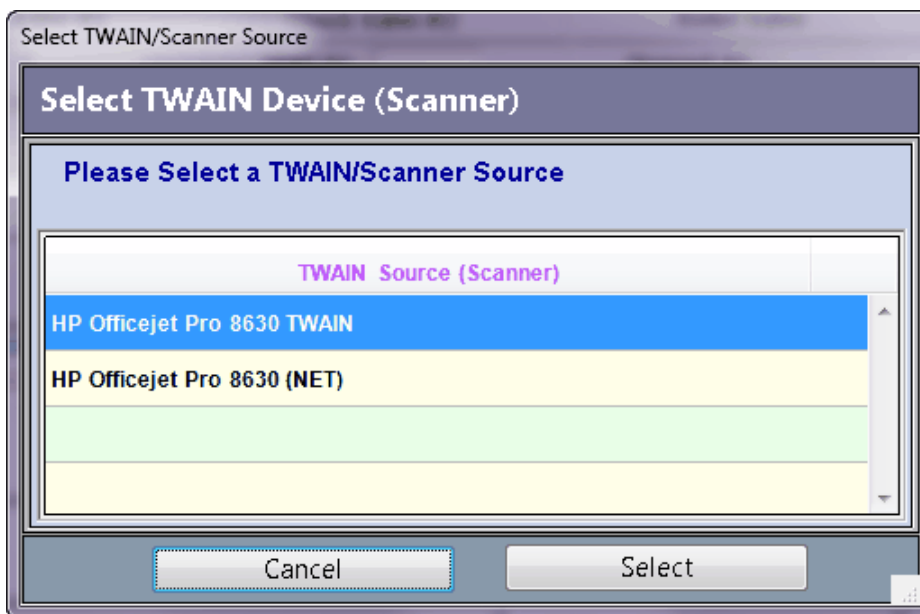
The screenshot shows the 'XC2 Software - BFP : Enter New Test Results' window. The search criteria are set to 'Facility Name: JOHNS GRILL' and 'Search Value: JOHNS GRILL'. The test code is 'PASS'. The device information includes 'Mfr: Watts', 'Serial Number: 555', 'Type: DCDA', 'Size: 10"', and 'Model: 767NDCDABF-VUVD'. The facility address is '83 ELLIS ST - SAN FRANCISCO'. The interface is divided into sections for 'Check Valve #1', 'Check Valve #2', 'Relief Valve', and 'Shut-Off #1 & #'. A 'Comments' dropdown menu is open, with 'Load from Scanner' selected and highlighted by a red box and a red arrow. Other visible elements include 'Tester: NELSON BRYANT', 'Company Name: ICABODS BACKFLOW', and various buttons for report options, device replacement, and saving.

Notes:

Select your "TWAIN" Device

"TWAIN" Device? - In other words choose your Scanner.

Note: If you do not see your Scanner in the list, it may need to be reinstalled on your computer.



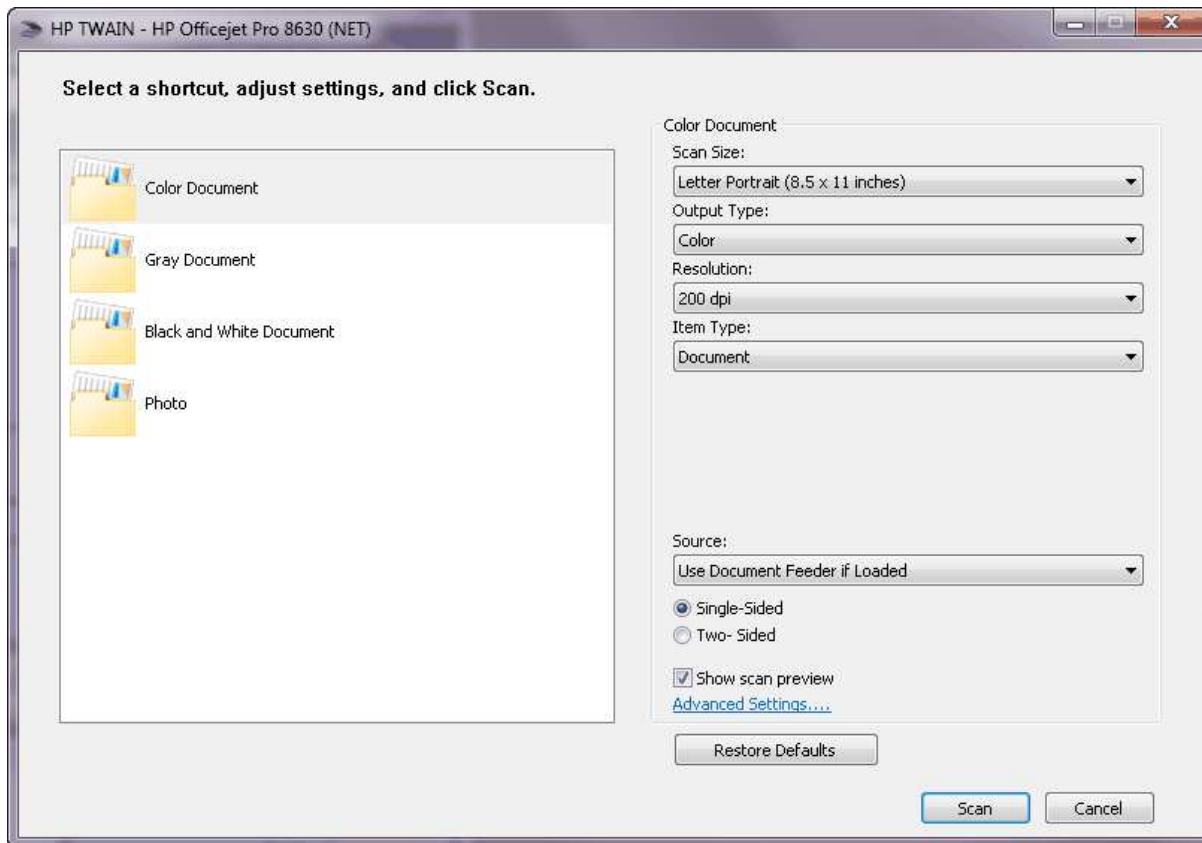
Notes:

TWAIN Driver

Your "TWAIN" Driver will load

This is my current TWAIN Driver but you may have one that is completely different.

Make any adjustment that you need.

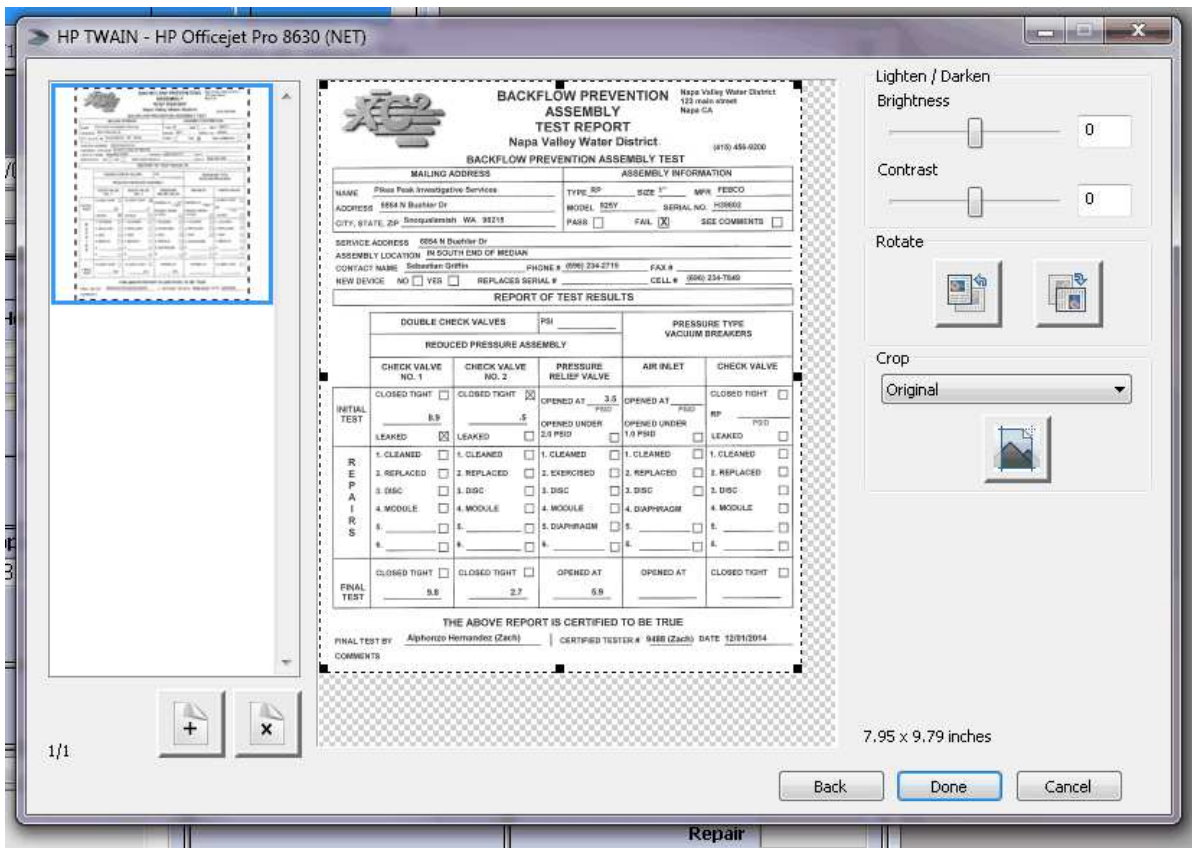


Notes:

Create Your Scan

Create your scanned document.

Important Note: Be mindful of the size of the document. I would try to keep the file as small as possible.

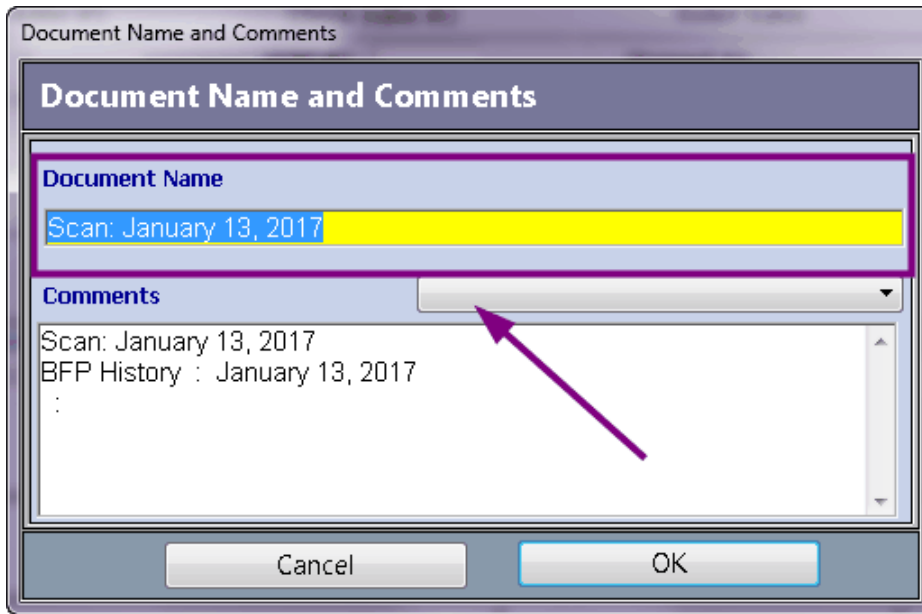


Notes:

Name Your Document

Give your document a name.

You can also write any comments that you like.

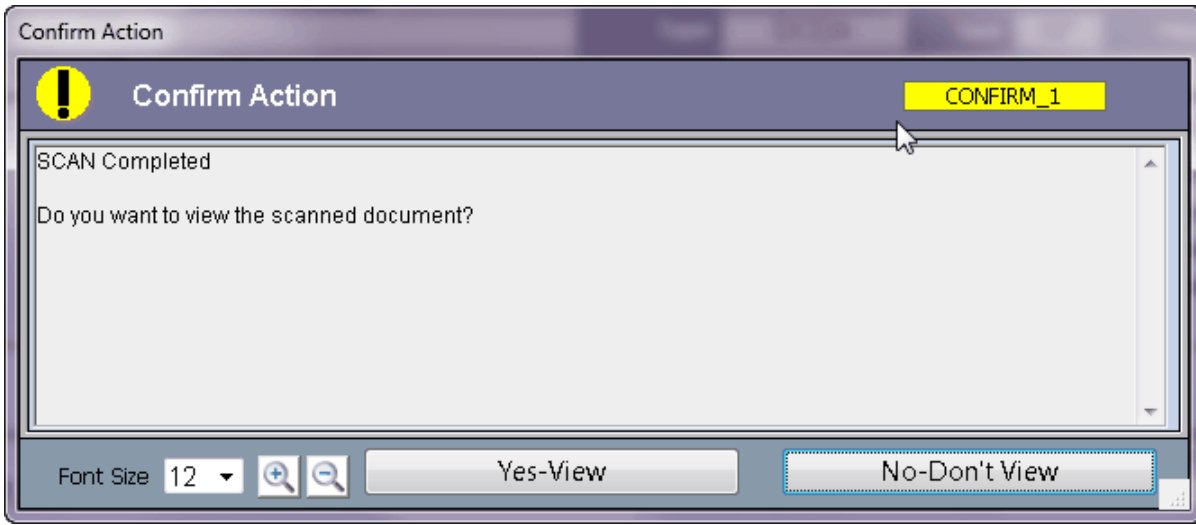


Notes:

View Document

You can choose to view your document


Click Yes-View or No-Don't View



Notes:

[View Scan](#)

Here you can view your scan, print a hard copy or you may just close the screen.



BACKFLOW PREVENTION ASSEMBLY TEST REPORT

Napa Valley Water District

BACKFLOW PREVENTION ASSEMBLY TEST

Napa Valley Water District
123 main street
Napa CA

(415) 456-9200

MAILING ADDRESS		ASSEMBLY INFORMATION					
NAME	Pikes Peak Investigative Services	TYPE	RP	SIZE	1"	MFR	FEBCO
ADDRESS	6854 N Buchler Dr	MODEL	825Y	SERIAL NO.	H39802		
CITY, STATE, ZIP	Snoqualamish WA 98215	PASS	<input type="checkbox"/>	FAIL	<input checked="" type="checkbox"/>	SEE COMMENTS	<input type="checkbox"/>

SERVICE ADDRESS 6854 N Buchler Dr
 ASSEMBLY LOCATION IN SOUTH END OF MEDIAN
 CONTACT NAME Sebastian Griffin PHONE # (696) 234-2715 FAX # _____
 NEW DEVICE NO YES REPLACES SERIAL # _____ CELL # (696) 234-7649

REPORT OF TEST RESULTS

	DOUBLE CHECK VALVES		PSI	PRESSURE TYPE VACUUM BREAKERS	
	REDUCED PRESSURE ASSEMBLY				
	CHECK VALVE NO. 1	CHECK VALVE NO. 2	PRESSURE RELIEF VALVE	AIR INLET	CHECK VALVE
INITIAL TEST	CLOSED TIGHT <input type="checkbox"/> <u>8.9</u> LEAKED <input checked="" type="checkbox"/>	CLOSED TIGHT <input checked="" type="checkbox"/> <u>.5</u> LEAKED <input type="checkbox"/>	OPENED AT <u>3.5</u> PSID OPENED UNDER 2.0 PSID <input type="checkbox"/>	OPENED AT _____ PSID OPENED UNDER 1.0 PSID <input type="checkbox"/>	CLOSED TIGHT <input type="checkbox"/> RP _____ PSID LEAKED <input type="checkbox"/>
REPAIRS	1. CLEANED <input type="checkbox"/> 2. REPLACED <input type="checkbox"/> 3. DISC <input type="checkbox"/> 4. MODULE <input type="checkbox"/> 5. _____ <input type="checkbox"/> 6. _____ <input type="checkbox"/>	1. CLEANED <input type="checkbox"/> 2. REPLACED <input type="checkbox"/> 3. DISC <input type="checkbox"/> 4. MODULE <input type="checkbox"/> 5. _____ <input type="checkbox"/> 6. _____ <input type="checkbox"/>	1. CLEANED <input type="checkbox"/> 2. EXERCISED <input type="checkbox"/> 3. DISC <input type="checkbox"/> 4. MODULE <input type="checkbox"/> 5. DIAPHRAGM <input type="checkbox"/> 6. _____ <input type="checkbox"/>	1. CLEANED <input type="checkbox"/> 2. REPLACED <input type="checkbox"/> 3. DISC <input type="checkbox"/> 4. DIAPHRAGM <input type="checkbox"/> 5. _____ <input type="checkbox"/> 6. _____ <input type="checkbox"/>	1. CLEANED <input type="checkbox"/> 2. REPLACED <input type="checkbox"/> 3. DISC <input type="checkbox"/> 4. MODULE <input type="checkbox"/> 5. _____ <input type="checkbox"/> 6. _____ <input type="checkbox"/>
FINAL TEST	CLOSED TIGHT <input type="checkbox"/> <u>9.8</u>	CLOSED TIGHT <input type="checkbox"/> <u>2.7</u>	OPENED AT _____ <u>5.9</u>	OPENED AT _____	CLOSED TIGHT <input type="checkbox"/>

THE ABOVE REPORT IS CERTIFIED TO BE TRUE

FINAL TEST BY Alphonzo Hernandez (Zach) | CERTIFIED TESTER # 9488 (Zach) DATE 12/01/2014

COMMENTS _____

Always View Scanned Document
 Always Confirm Before Viewing Scanned Document

Width Height

Notes:

Enter Test

Enter Your Test.

You can now enter your test or save the test you have entered.

Your completed test form is now saved inside the assembly record.

Notes:



Test Entry: Test Results Pass or Fail Only

KB Asset ID: 2131

Page describes how to change the screen for entering test results to accommodate a Pass or Fail only test form.

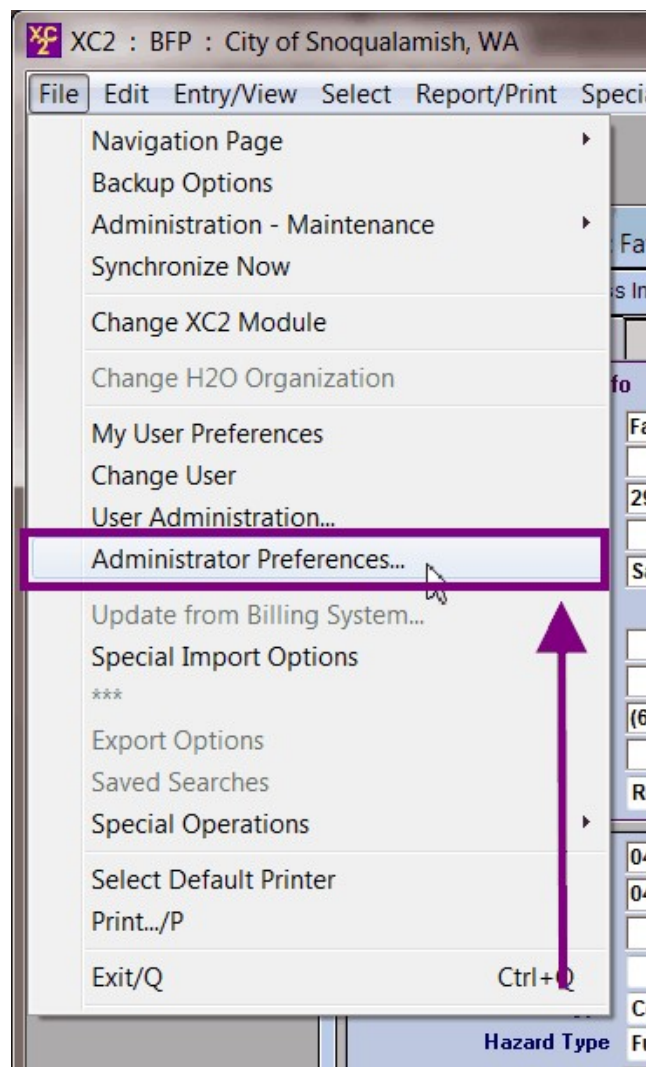
Note

You have to be logged in as a Super Administrator to access this area.

This feature is used if you only want to record whether a test record Passed or Failed and do not want to record the test values in XC2. You can change the test entry screen in XC2 to accomodate this style of test entry.

To change to a Pass or Fail Only System

Go up to the File menu and select Administrator Preferences

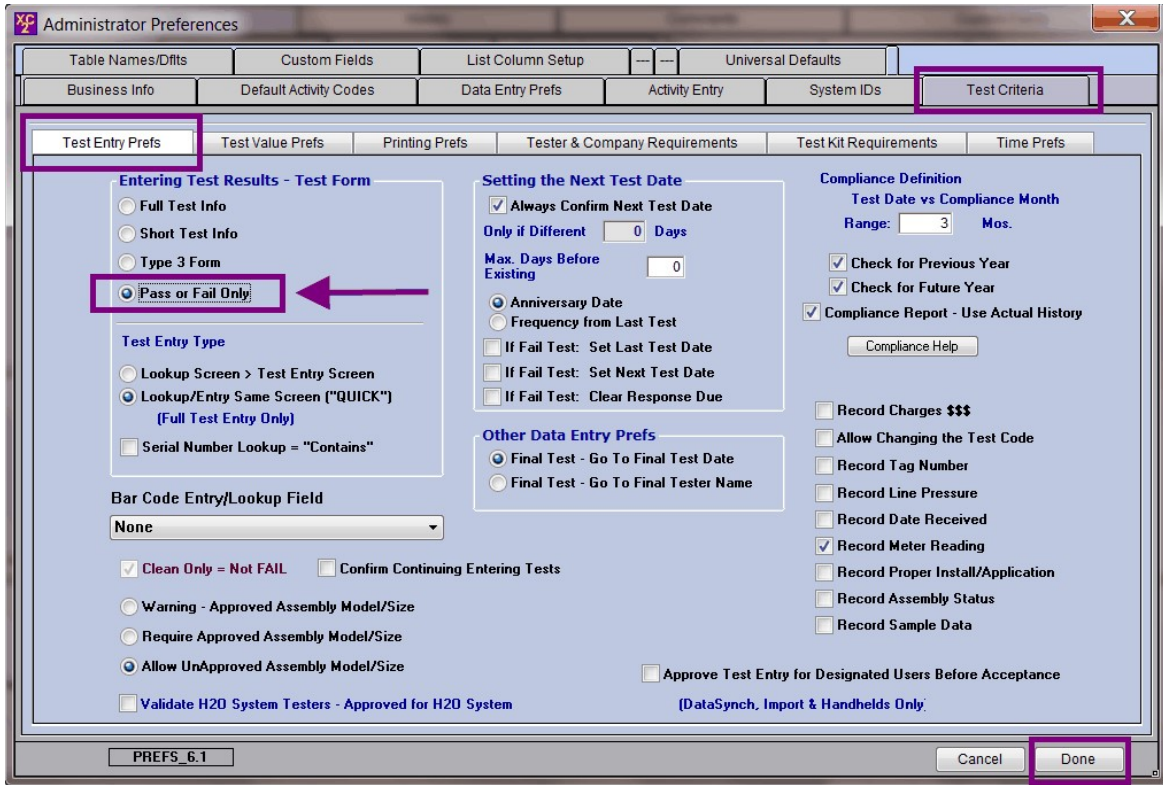


Select Test Criteria tab

Test Entry Prefs tab

Select Pass or Fail Only

Click Done



Notes:

Now when you enter tests, you will only have the option to choose Pass or Fail when entering test results

The screenshot shows the 'XC2 Software' window with the following data and controls:

- Title Bar:** XC2 Software - BFP : Fat Boys Bar Grill : Assembly Serial Num : 654987 : 2900 Chimera : RPZ : Facility ID: 24650 : 1 of 1 Selected
- Test Results Section:**
 - Test Code: **PASS** (dropdown)
 - Type: **RPZ**
 - Size: **3"**
 - SN: **654987**
 - Last Test: **08/04/2011**
 - Mfg: **WILKINS**
 - Model: **975**
 - RP Buffer: **3.0**
 - Assy Location: (empty field)
- Tester Information Table:**

Tester	Initial	Tester Name	Company Name	Pass/Fail	Date	Test Kit / Gauge	Time In	Time Out
		Tyson Henderson	Robert Allen Backflow Testir	Pass	12/02/2013	10030524	10:00 AM	10:25 AM
- Meter Reading:** (Yellow highlighted field)
- Comments:** (Text area with dropdown arrow)
- History UD 01:** (Text field)
- History UD 02:** (Text field)
- Buttons:** Report Options, Replace Device, View History, Signature
- Footer Buttons:** Mod History, Line Items, Edit Device Info, XC2 Picts, Print Ctrl-P, Charges/Time/Info, Import Fields, Cancel, Save

Notes:



XC2 User Manual Letter/Notices

- **Creating Letters – The Letter Editor**
- **Creating Letters – Merge Fields**
- **Response Due vs Test Due Dates**
- **Automatic Notice Setup**
- **Sending Notices Manually**
- **Using Automatic Notices**



XC2 Software Knowledge Base



Creating Letters Accessing the Letter Editor

KB Asset ID: 3613

This page describes how to access XC2's Letter Editor and create a new Letter

Notice Setup

The letter editor can be accessed from the main page

Click Notice Setup

The screenshot shows the XC2 software interface. At the top, the title bar reads "XC2 Software - BFP : City of Snoqualamish, WA: * Facility: 6 of 92 Records : Multi-Line : WEB SERVER ON : 80 : WEB BFP Test". Below the title bar is a menu bar with options: "User Options", "Add", "Delete", "Find", "Sort", "Show All", "Export", "Saved Search", and "Report". A toolbar below the menu bar contains icons for "Add", "Delete", "Find", "Sort", "Show All", "Export", "Saved Search", and "Report".

The main area displays a table of facilities. The table has columns: "#", "Facility Name", "Addr (#)", "Street", "Site Qty", "Sched Code", and "Ne". The data rows are:

#	Facility Name	Addr (#)	Street	Site Qty	Sched Code	Ne
1	RAINBOW REBUILDERS	6694	ABBOTSFORD	7	01-Jan	
2	DEL-OLLIE'S ROUNDUP ----- CHANGE	9451	BANBRIDGE	1	01-Jan	
3	FINNIGANS BELL PEPS	22222	BELL	6	01-Jan	
4	TAFOYA ELECTRIC CHANGE	1795	CHURCH VIEW	1	01-Jan	
5	SENIORS IN COMMUNITY LIVING INC	9095	GREYSON	2	01-Jan	
6	TEST FACILITY	123	MAIN	15	01-Jan	
				32		

On the left side, there is a sidebar with "Favorite Tasks". The tasks listed are: "Test History", "Facility Survey History List", "Notice Setup" (highlighted with a purple box and a purple arrow), "User List", "Automatic Reminders", "Automatic Notices", and "Administrator Setup".

At the bottom of the interface, there are buttons for "Send Notice", "Enter Survey", "Enter Test", and "Exit XC2". There are also checkboxes for "Filter On" and "Filter Facilities w/out Backflow".

Notes:

List of Current Letters

You can edit a letter by double clicking on the record.

To create a new notice click New

XC2 Software - BFP : City of Snoqualamish, WA: * Current Letter: 10 of 38 Records : Multi-Line : WEB SERVER ON : 80 : WEB BFP Test

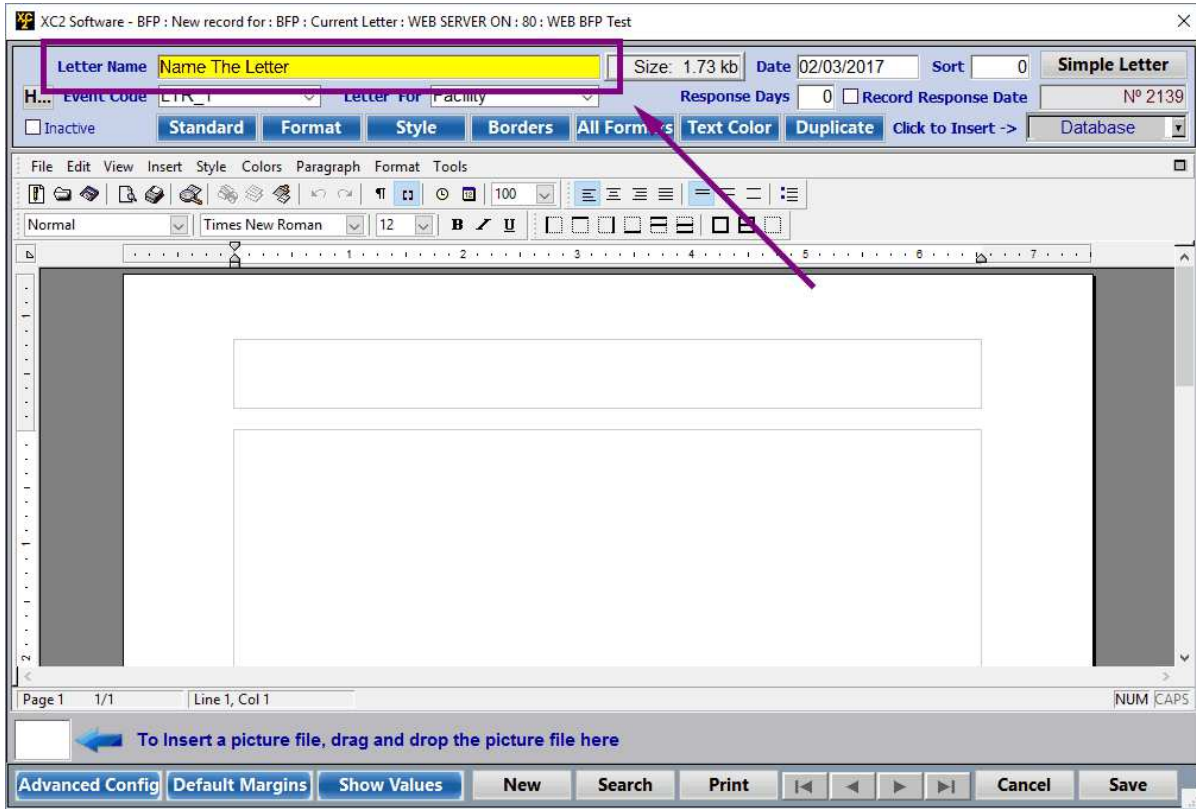
10 of 38 Records

#	Letter Name	Revised Date	Event Code	Respond	Letter For
1	DUPLICATE LETTER	10/11/16	LTR_1	30	Facility History Survey
2	FAILED TEST NOTICE 1	12/09/10	LTR_1	14	FACILITY
3	FAILED TEST NOTICE 2	12/09/10	LTR_2	7	FACILITY
4	INSTALLATION NOTICE #1	05/15/00	LTR_1	30	ASSEMBLY
5	INSTALLATION NOTICE #2	08/23/11	LTR_1	15	BFP Assembly
6	INSTALLATION NOTICE #3	08/23/11	LTR_1		BFP Assembly
7	TEST DUE #1	08/14/14	LTR_1	30	Facility

Set Selection ? Exclude Inactive Current Letter Records New [Magnifying Glass] [ALL] [A-Z] [Printer] [Cursor] [List Icon]

Notes:

Name Your Letter



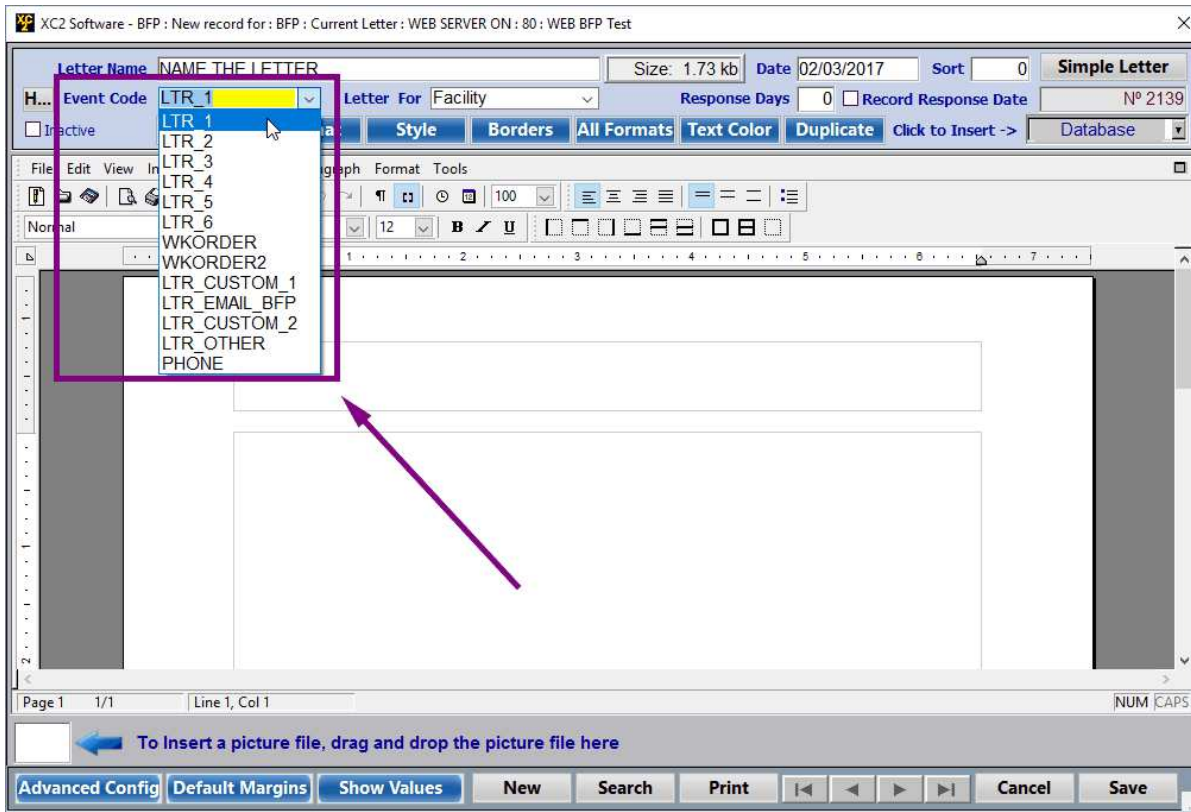
Notes:

Give the letter a Code

What is the order of this letter?

If it is a first notice give the code LTR_1

If it is a second notice give the code LTR_2

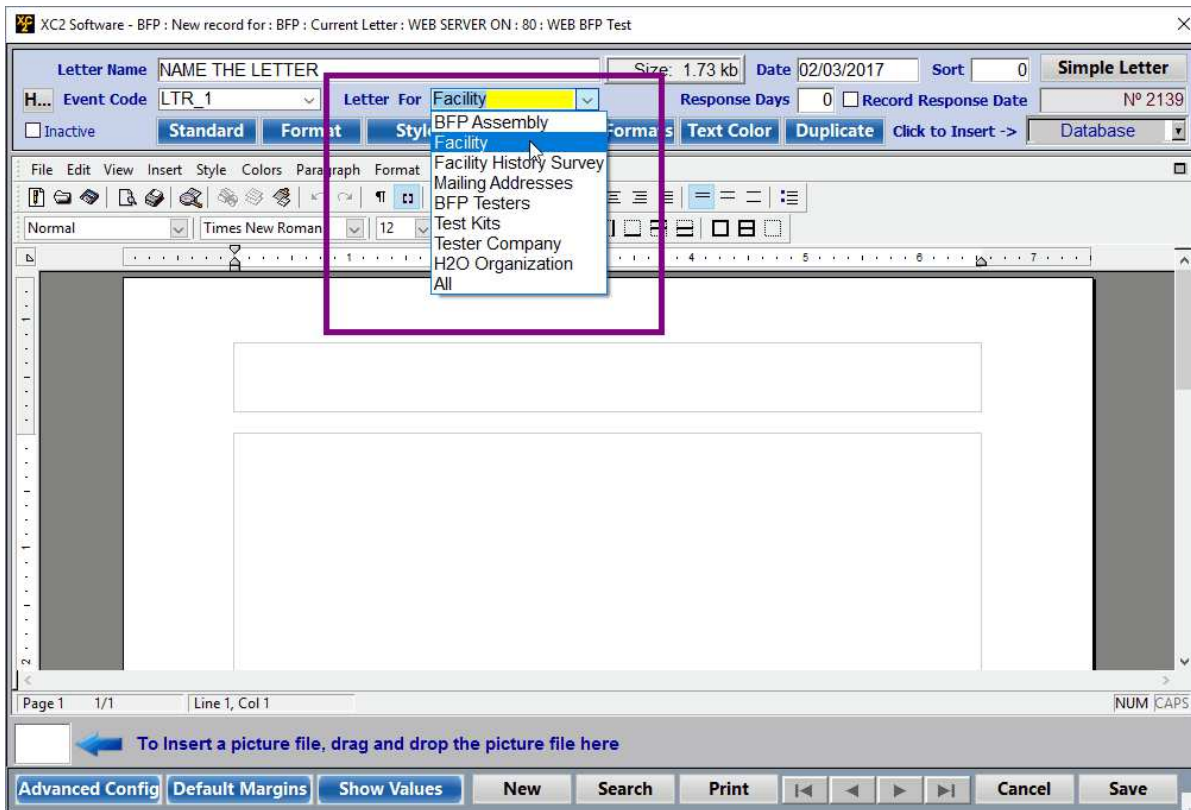


Notes:

Letter For

From what list of records will this letter be sent

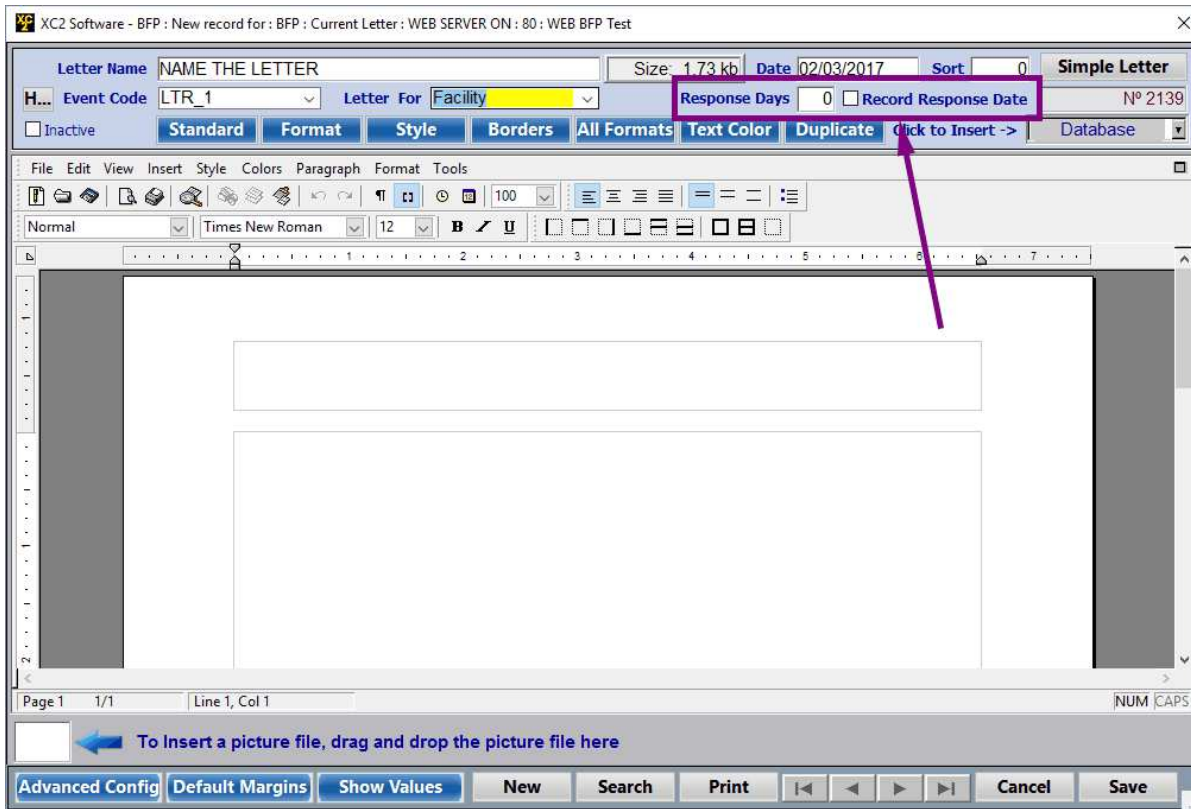
Note: Most Test due notices will be sent from a list of Facility Records



Notes:

Response Date

How much time will you give them to respond?

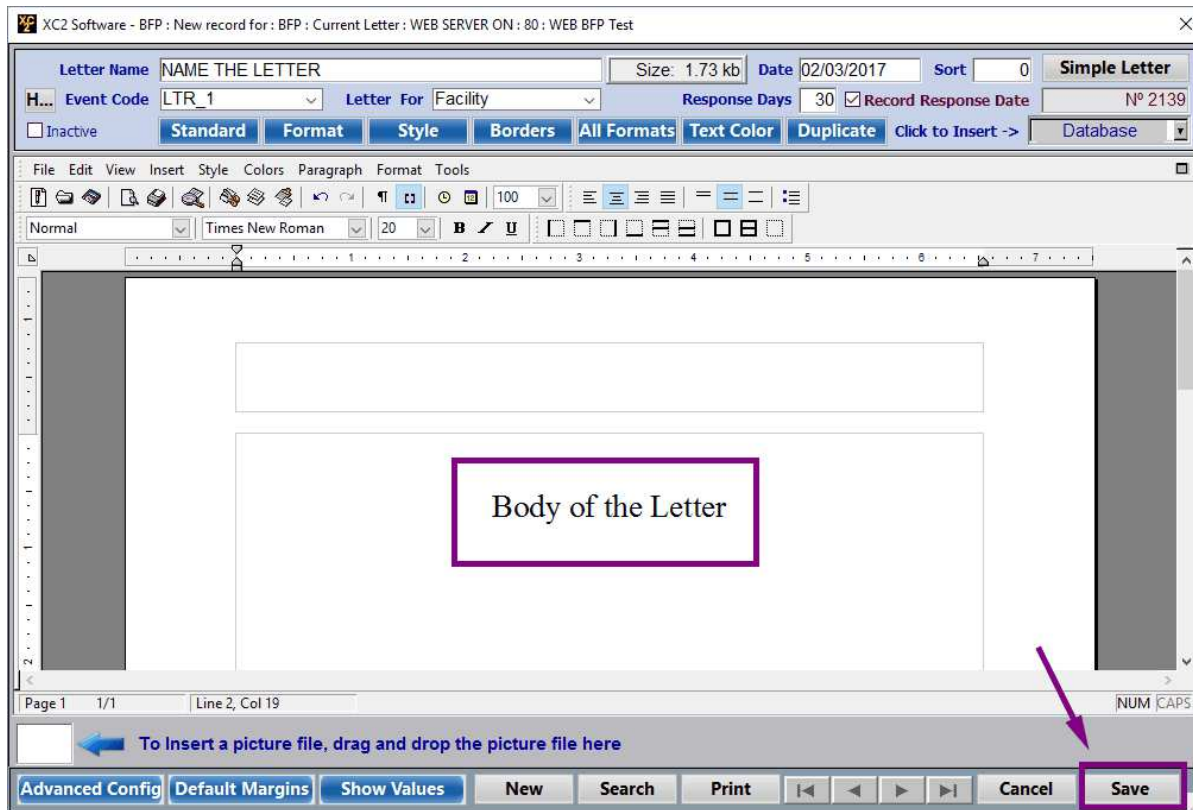


Notes:

Body of Letter

Type the body of your letter here

click save to finish



Notes:



XC2 Software Knowledge Base



How to Create A Letter: Merge Fields

KB Asset ID: 36

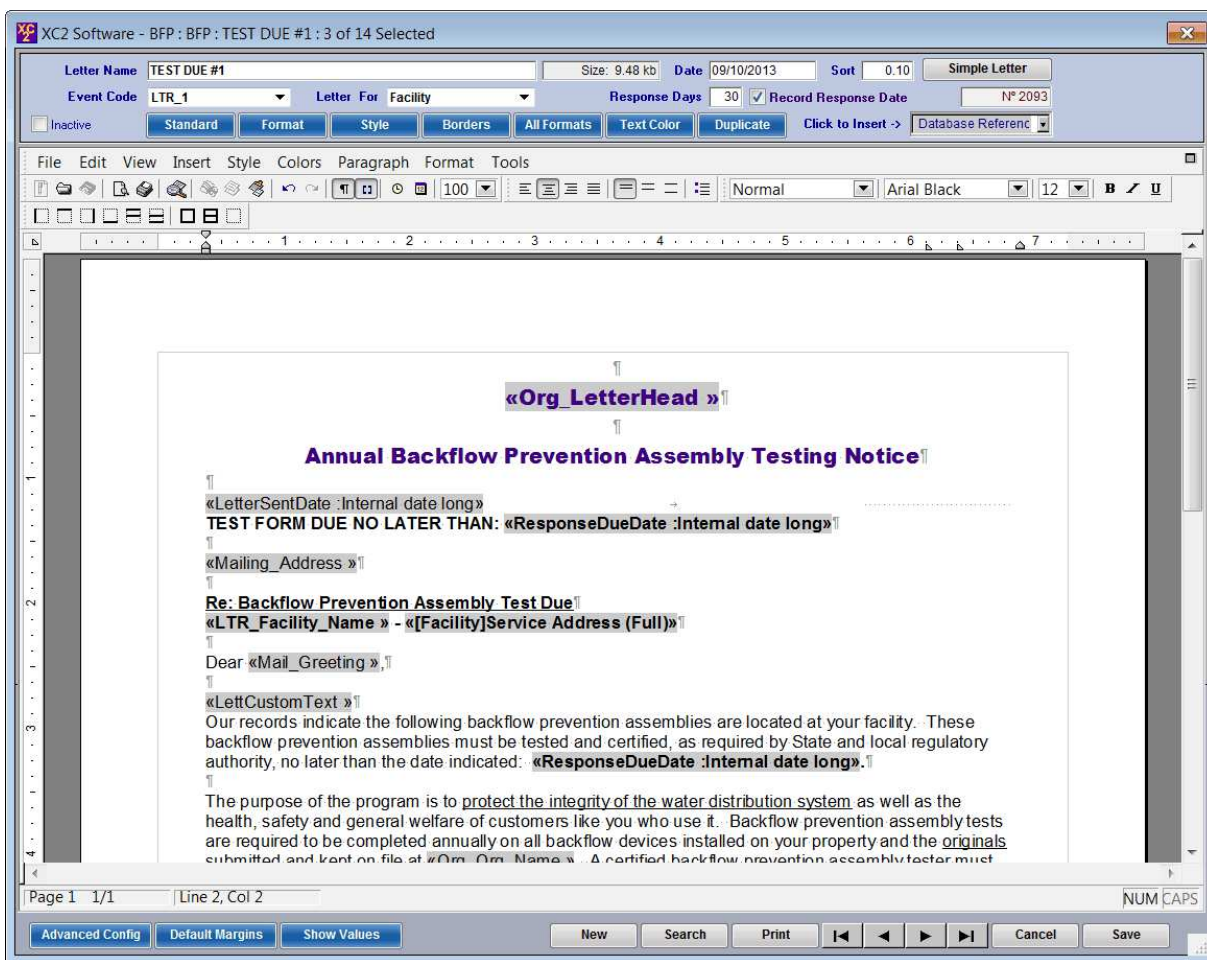
This page describes how to add a Merge Field to a Letter, where they can be found, and how to use them.

Merge Fields

The purpose of adding Merge fields to a letter is to produce universal notifications that are individual personalized by XC2 and not personalized by hand.

The items below highlighted in gray are Merge Fields.

Letter With Merge Fields



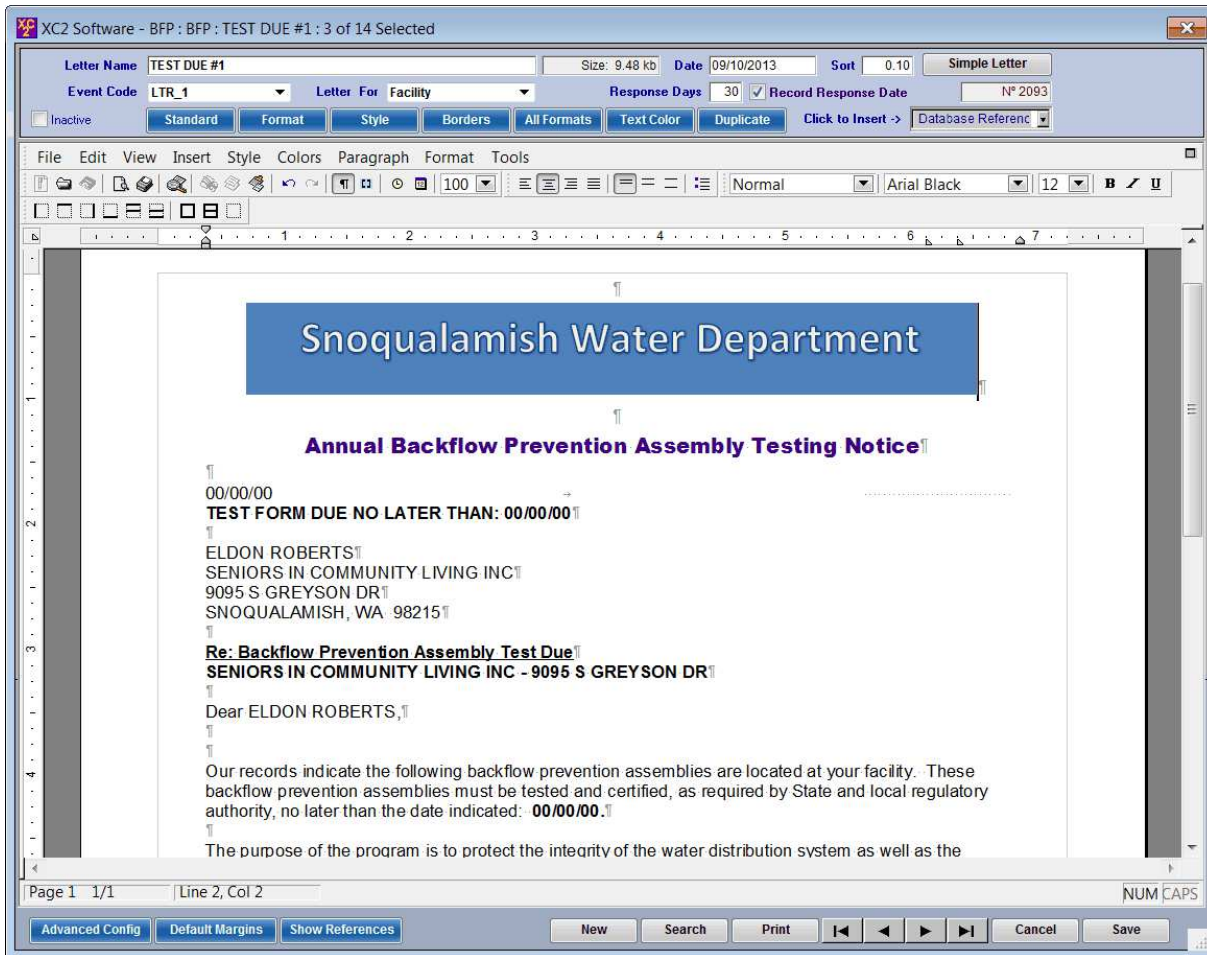
Notes:

How Do Merge Fields Work?

Merge fields import specific information from records you select into your letter.

By adding Merge fields to your letter, when you print one letter at a time or to 50 facility records at once, all the information for each record will be printed correctly on each letter.

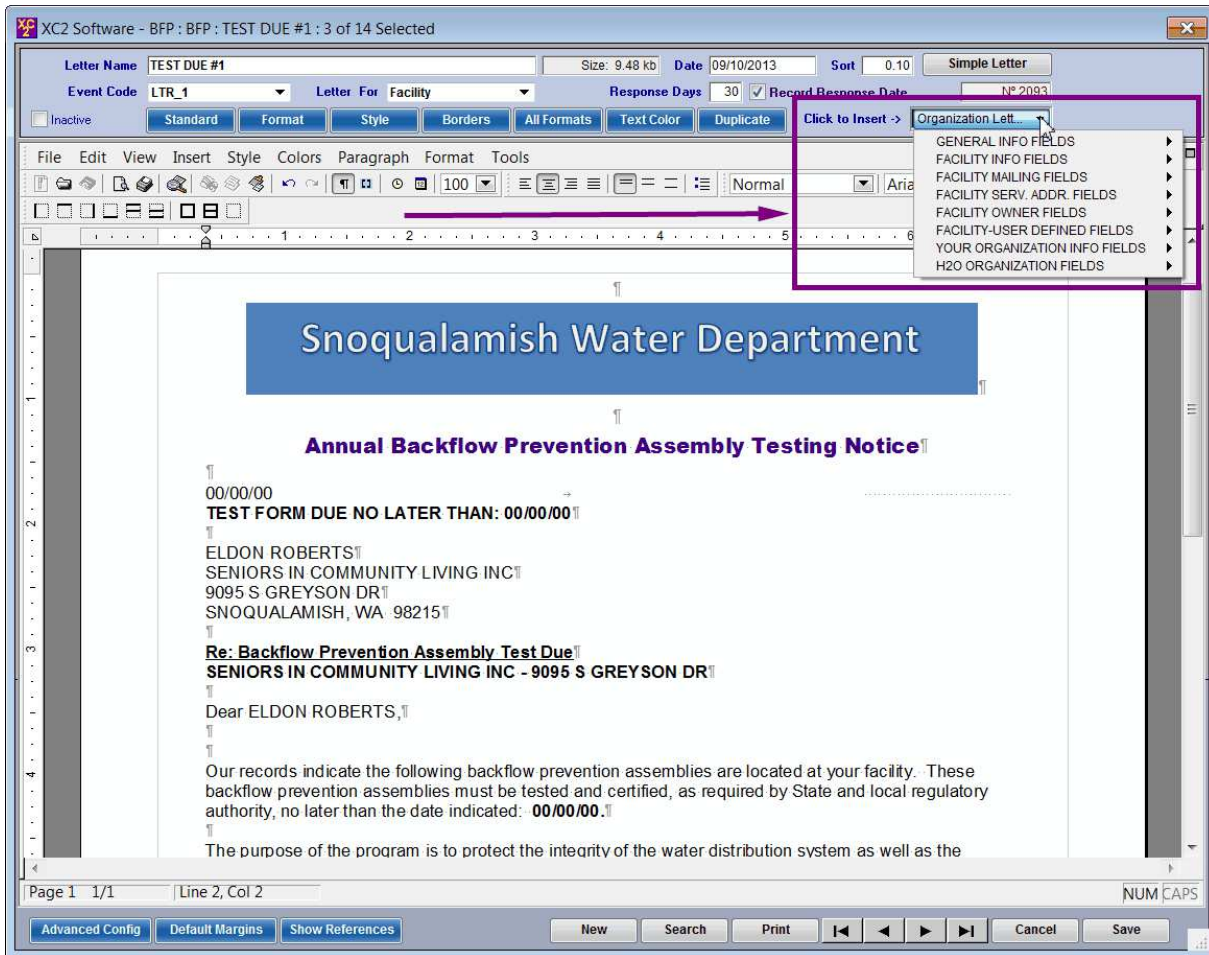
Below is the same letter as above with Merge Field information imported by XC2.



Notes:

Where to Find Merge Fields

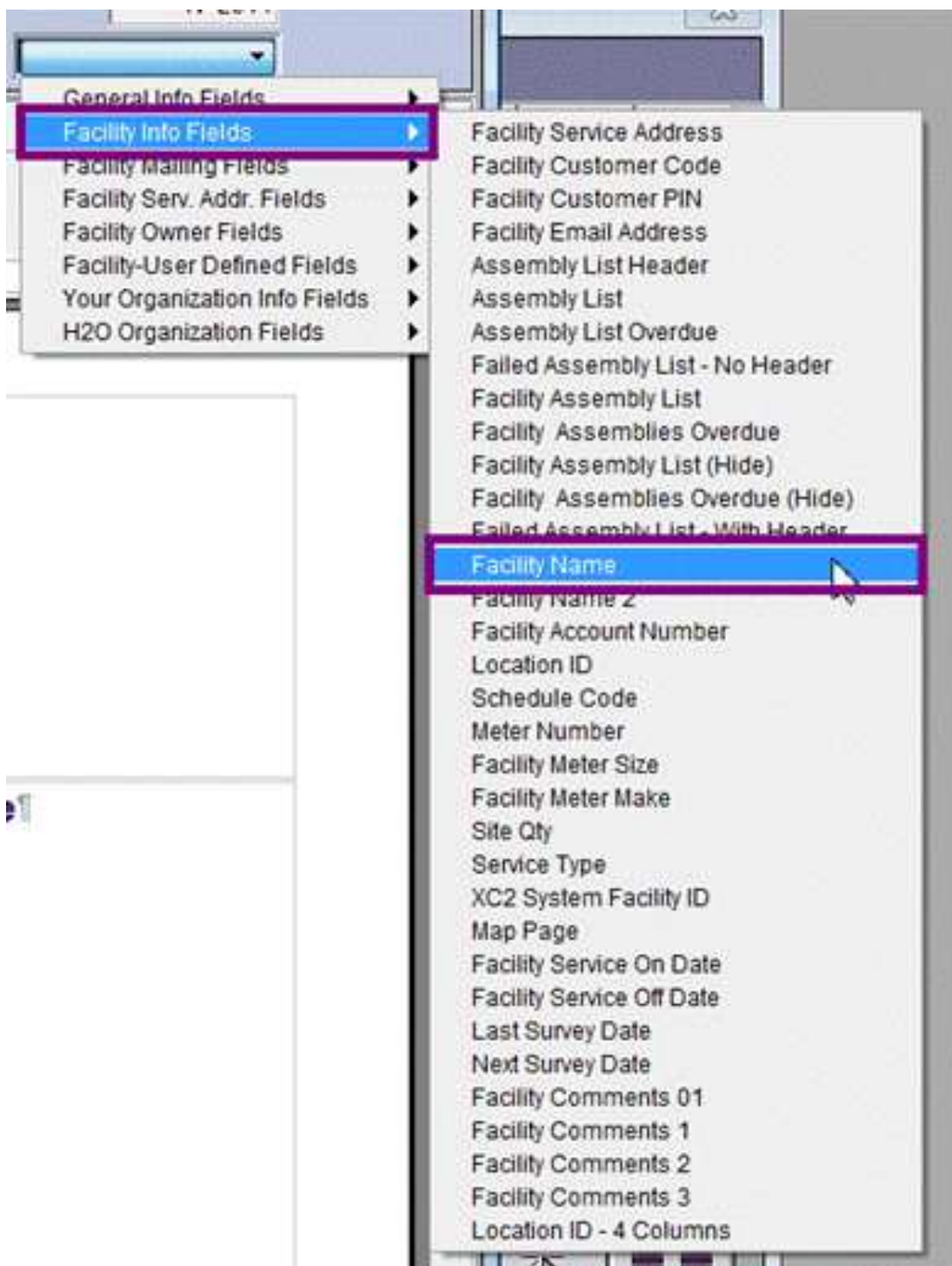
In the letter editor, click the pull-down menu "Click to Insert". All Merge Fields can be found here



Notes:

Choose Merge Field

Choose a category, than choose a Merge Field to add. Here under Facility Info Fields, I choose Facility Name



Notes:

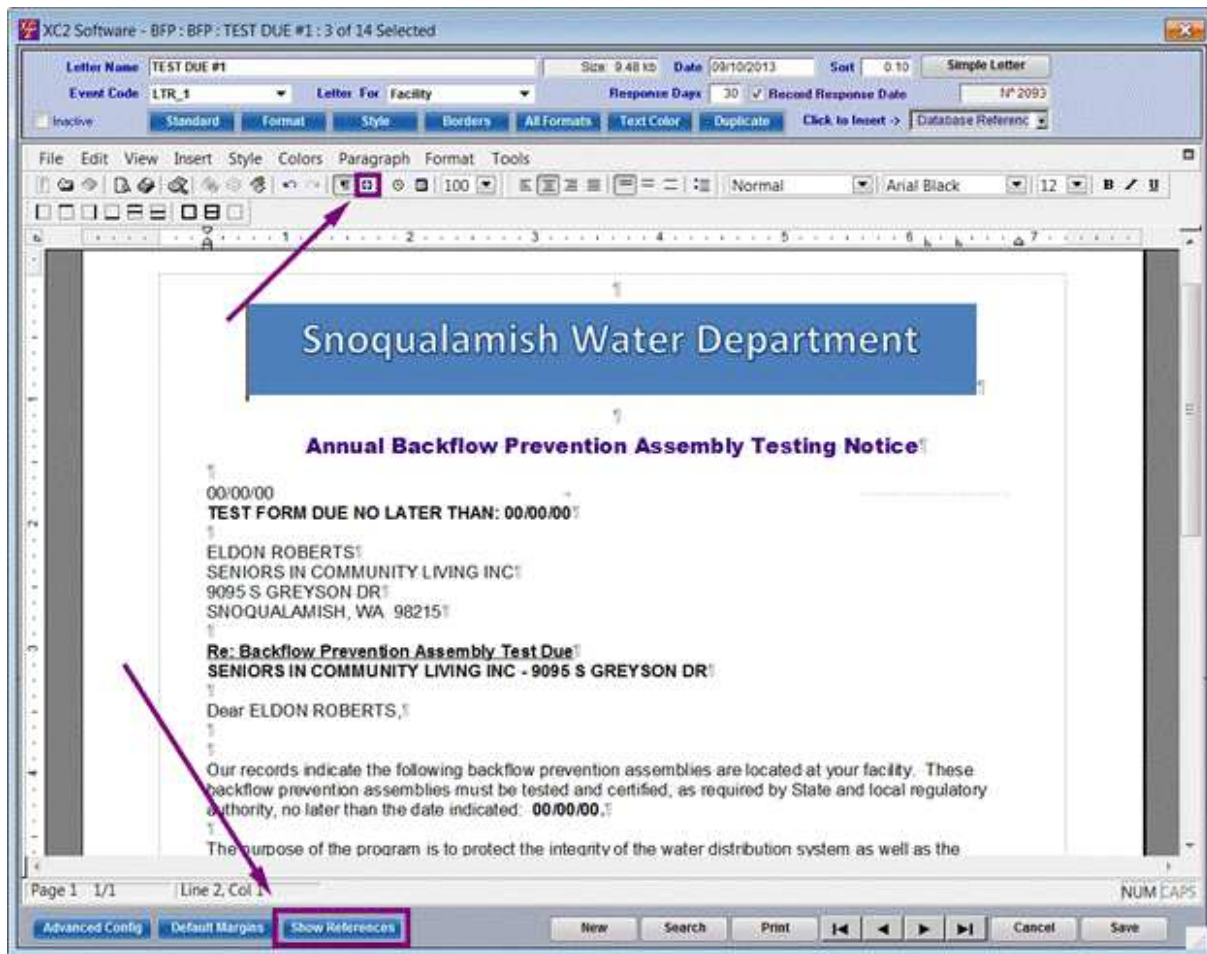
Preview Letter

You Can Preview the Notice my deselecting View References.

or

By Clicking on Show References at the bottom.

Notice a Facility Name is now where the merge field once was.



Notes:



XC2 Software Knowledge Base



Next Test Due Date VS Response Due Date

KB Asset ID: 3615

This page describes the differences between next test due date and response date and outlines their importance

List View

Assembly Records can have both a Next Test Due Date and a Response Date.

Here I have a list of assemblies with the Next Test Due and Response Dates highlighted.

The screenshot shows the XC2 software interface for 'BFP Assembly' records. The table displays 15 records with columns for Facility Name, Next Test, Resp Due Date, and Response Item. The 'Next Test' and 'Resp Due Date' columns are highlighted with a purple border.

#	Facility Name	Next Test	Resp Due Date	Response Item
	FINNIGANS BELL PEPS	02/01/17	03/01/17	TEST DUE #1
	FINNIGANS BELL PEPS	02/01/17	03/01/17	TEST DUE #1
	JOHNS GRILL	02/01/17	03/01/17	TEST DUE #1
	TEST FACILITY	02/01/17	03/01/17	TEST DUE #1
	TEST FACILITY	01/01/17	03/01/17	TEST DUE #1
	FINNIGANS BELL PEPS	02/01/17	03/01/17	TEST DUE #1
	**MARIA ELENA'S MEXICAN RESTAURANT	02/01/17	03/01/17	TEST DUE #1
	29TH AVE LIQUOR	02/01/17	03/01/17	TEST DUE #1
	FINNIGANS BELL PEPS	02/01/17	03/01/17	TEST DUE #1
	GRAPHIC DESIGNEEES	02/01/17	03/01/17	TEST DUE #1
	FINNIGANS BELL PEPS	02/01/17	03/01/17	TEST DUE #1
	AAA - MEX IMPORTS - CHANGE	02/01/17	03/01/17	TEST DUE #1
	1PECK DORAN P C	02/01/17	03/01/17	TEST DUE #1

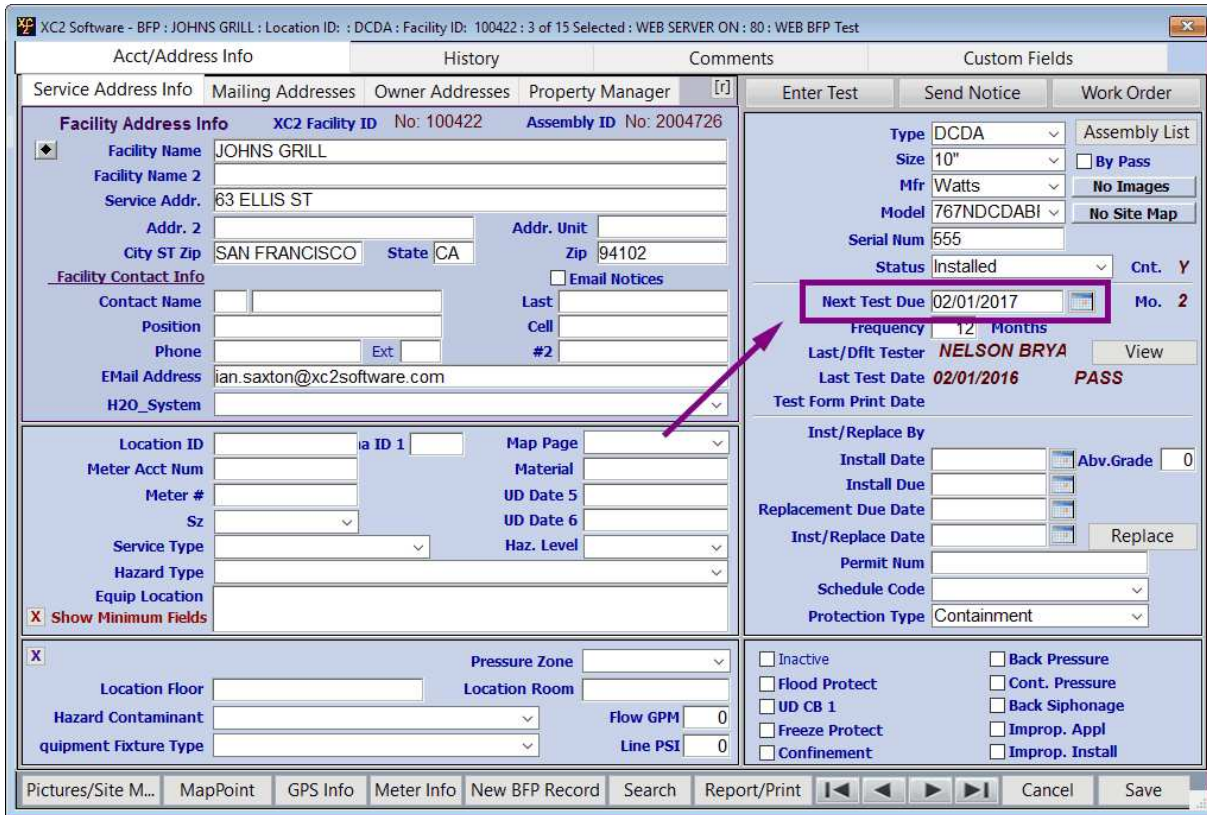
Notes:

What is The Next Test Due Date?

The Next Test Due Date is the Date the Backflow Assembly is Due to be Tested.

This Date can only change if

- 1) A Valid Test was entered for the BFP
- 2) It is manually changed by the user.



Notes:

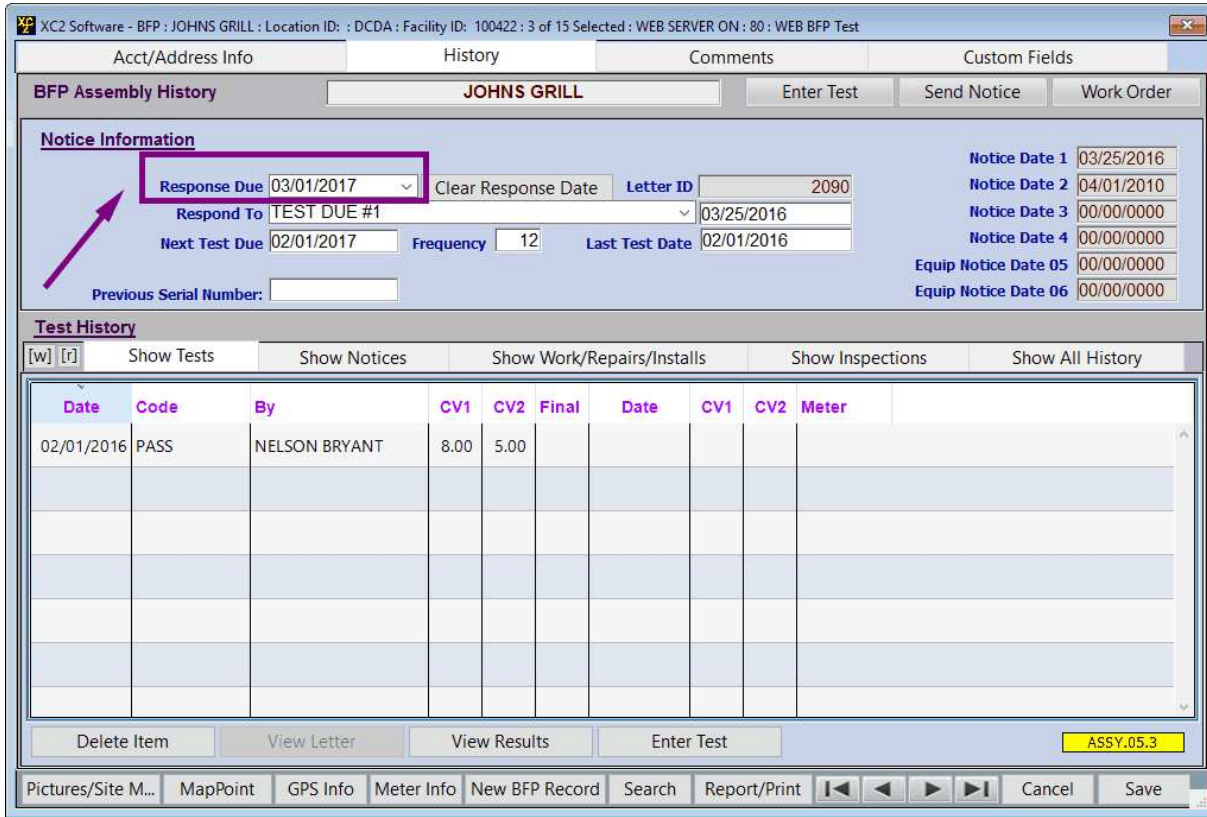
What is the Response Date?

The Response Due Date is the Date the Customer has to respond to a specific Item

For example, every time you send a notice XC2 will likely give the backflow assembly a response Date.

After the Response Date Lapses, a different course of action can be taken

This is how you will know when to re-contact the person.



Notes:

Response Date

Here I have a list of Backflow Assemblies with their response dates and response items highlighted.

It is showing that these backflow assemblies are due to be tested but I will re-contact them in March if they had not responded to my notice.

Once the backflow assembly is tested, the response due date will be removed.

#	Facility Name	Next Test	Resp Due Date	Response Item
1	FINNIGANS BELL PEPS	02/01/17	03/01/17	TEST DUE #1
2	FINNIGANS BELL PEPS	02/01/17	03/01/17	TEST DUE #1
3	JOHNS GRILL	02/01/17	03/01/17	TEST DUE #1
4	TEST FACILITY	02/01/17	03/01/17	TEST DUE #1
5	TEST FACILITY	01/01/17	03/01/17	TEST DUE #1
6	FINNIGANS BELL PEPS	02/01/17	03/01/17	TEST DUE #1
7	**MARIA ELENA'S MEXICAN RESTAURANT	02/01/17	03/01/17	TEST DUE #1
8	29TH AVE LIQUOR	02/01/17	03/01/17	TEST DUE #1
9	FINNIGANS BELL PEPS	02/01/17	03/01/17	TEST DUE #1
10	GRAPHIC DESIGNEES	02/01/17	03/01/17	TEST DUE #1
11	FINNIGANS BELL PEPS	02/01/17	03/01/17	TEST DUE #1
12	AAA - MEX IMPORTS - CHANGE	02/01/17	03/01/17	TEST DUE #1
13	1PECK DORAN P C	02/01/17	03/01/17	TEST DUE #1

Notes:



XC2 Software Knowledge Base



How to Set Up Automatic Notices

KB Asset ID: 2258

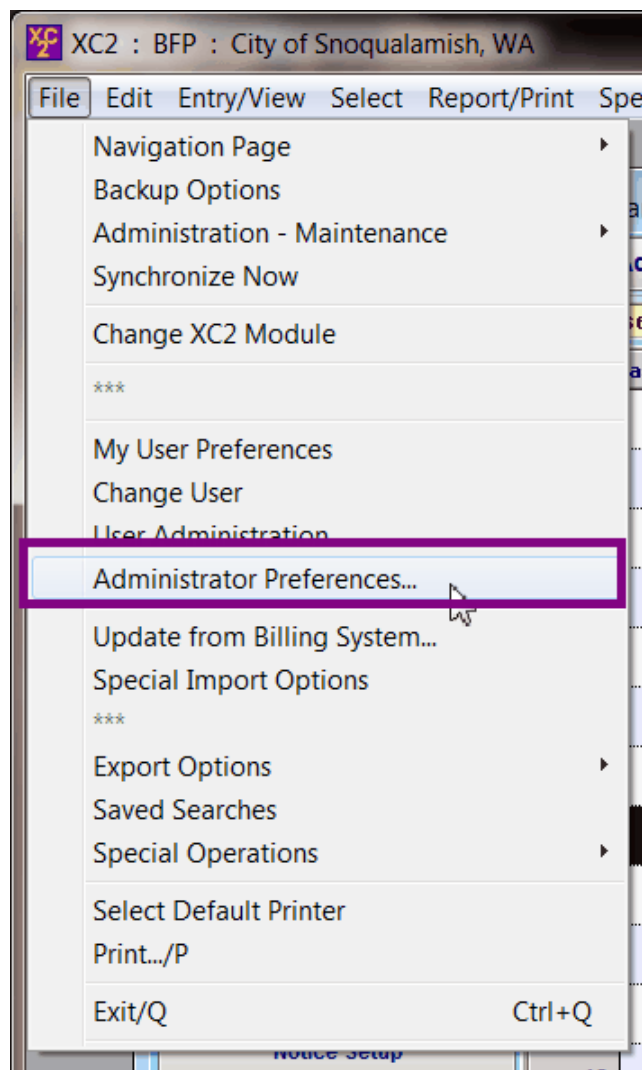
Part 2: Setting Up Automatic Notices

Admin Prefs

In order for XC2 to know which notices need to be printed, you have to tell XC2 which letters you plan on printing.

To access this area,

Go up to the File menu and select Administrator Preferences



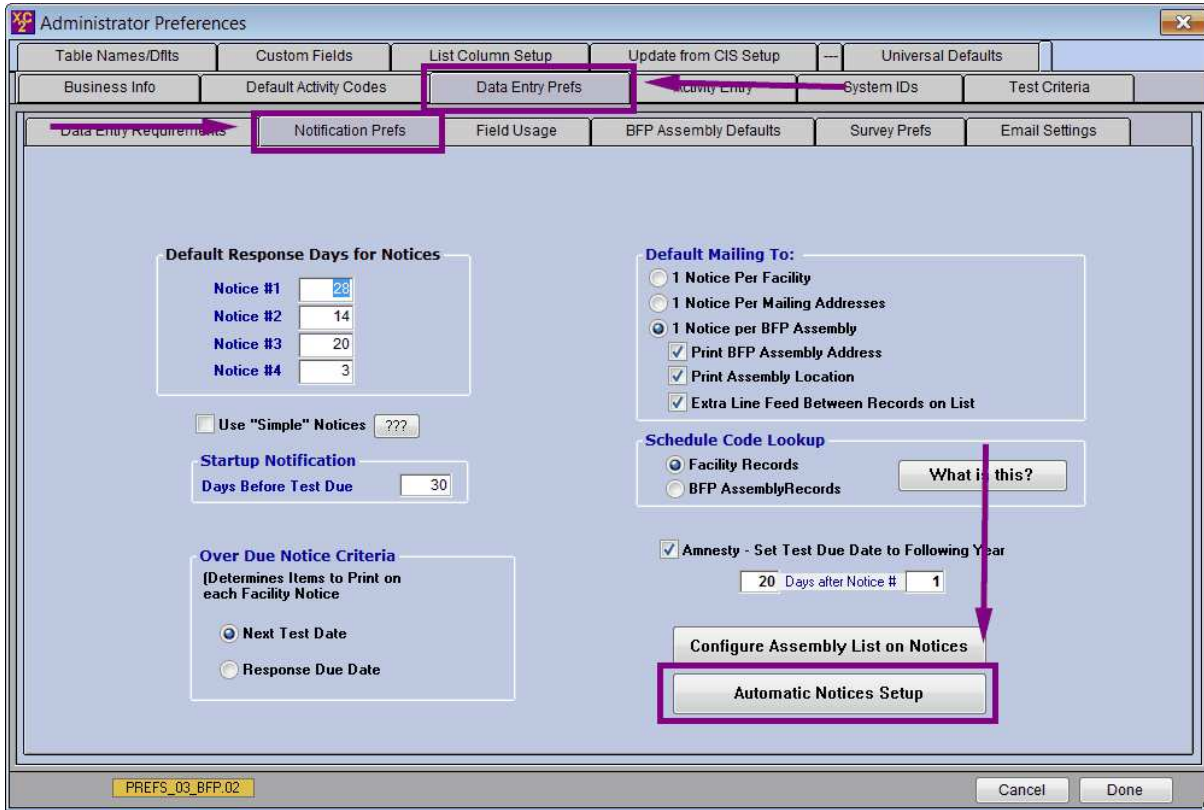
Notes:

Automatic Notices Setup

Select Data Entry Prefs Tab

Then select Notification Prefs Tab

Finally, click Automatic Notices Setup



Notes:

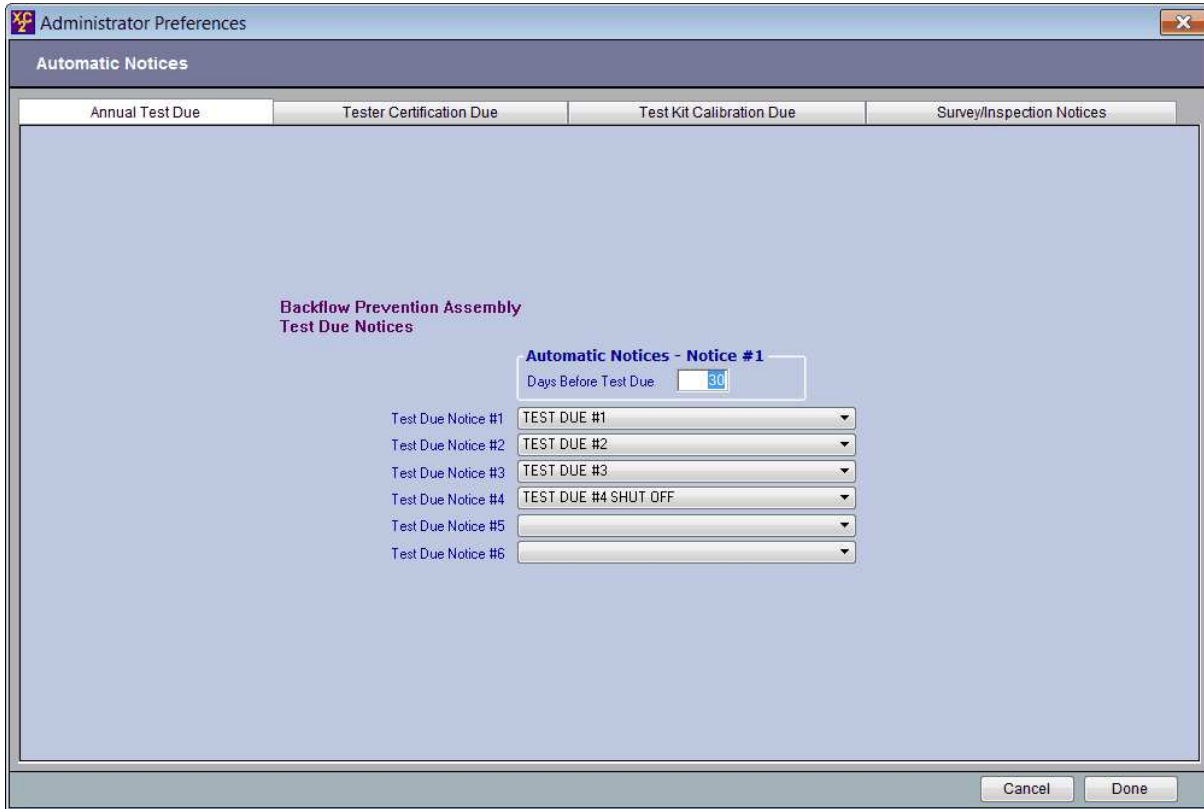
Choose Your Letters

Select the notice you want to send.

Choose only one notice for each Notice type.

Note: You do not have to send 6 notices.

Click Done when finished.



Notes:

Sending Notices

Now that Automatic Notices is set up, it is time to send Notices.

On the Main Page, select Send Annual Notices

The screenshot shows the 'XC2 Software - BFP : City of Snoqualamish, WA: * BFP Assembly: 12 of 91 Records : Multi-Line' window. The left-hand menu is open, and 'Send Annual Notices' is highlighted with a red box. A red arrow points to this option from the 'Notice Setup' section. The main window displays a table with the following data:

#	Last Letter Date	Active	Facility Name	Last Stat	Addr (#)	Street	Next Test
1	12/08/2013	✓	SENIORS IN COMMUNITY LIVING	PASS	9095	GREYSON	01/01/2013
2	03/25/2011	✓	LAKEWOOD FAMILY MEDICAL CL	PASS	7846	CHAMPIONS	01/01/2014
3	12/04/2013	✓	A FLAG HOUSE	PASS	1583	KIM	12/31/2010
4	12/01/2013	✓	R L PLIMPTON ASSOC INC	PASS	7480	LAKEHURST	09/30/2012
5	12/01/2013	✓	PARK MAYFAIR HOME OWNERS	PASS	6931	MEADOW BEND	07/31/2012
6	05/13/2013	✓	A & B FOREST FRESH CO	FAIL/PAS	4415	FERGUSON	08/31/2014
7	12/08/2013	✓	SENIORS IN COMMUNITY LIVING	PASS	464	KODIAK	01/01/2013
8	12/01/2013	✓	TOYS-R-US	PASS	515	VINSON	09/30/2014
9	08/01/2011	✓	ACADEMY VETERINARY HOSPITA	PASS	8350	LIGHTHOUSE	08/31/2014
10	05/13/2013	✓	ACADEMY VETERINARY HOSPITA	PASS	8350	LIGHTHOUSE	08/01/2014
11	12/01/2013	✓	BETHESDA AT ST ANTHONY HOS	PASS	1802	WOODCREEK	07/31/2012
12	12/01/2013	✓	BETHESDA AT ST ANTHONY HOS	PASS	1802	WOODCREEK	07/31/2012

Notes:

Select Notices to Print

Select the First Notices that you would like to print by marking corresponding checkbox.

Click Print Notices

XC2 will automatically print the selected letters and input a Response Due Date in the Assembly Record.

Automatic Test Due Notices

Automatic Notices - Test Due Notification Help/Info

	BFPs	Facilities	
Backflow Prevention Assemblies Due for First Notice	47	39	<input checked="" type="radio"/> Send First Notices
Next Test Date within Number of Days:	30		Show Me
Backflow Prevention Assemblies Requiring a Second Notice	11	8	<input type="radio"/> Send Second Notices
			Show Me
Backflow Prevention Assemblies Requiring a Third Notice	0	0	<input type="radio"/> Send Third Notices
			Show Me
Backflow Prevention Assemblies Requiring a 4th Notice	0	0	<input type="radio"/> Send 4th Notices
			Show Me
Backflow Prevention Assemblies Requiring a 5th Notice	0	0	<input type="radio"/> Send 5th Notices
			Show Me
Backflow Prevention Assemblies Requiring a 6th Notice	0	0	<input type="radio"/> Send 6th Notices
			Show Me

Put Notices in Order by: Facility Name Send All Notices

Send Via Email - For Those Designated

Letter Sent/Mailed Date: 01/20/2014
Response Due Date: 02/19/2014

Record in History, but Don't Print at All Cancel Print Notices

Notes:



Printing Notices: Manually

KB Asset ID: 3612

This page describes the process necessary to send notices manually out of XC2.

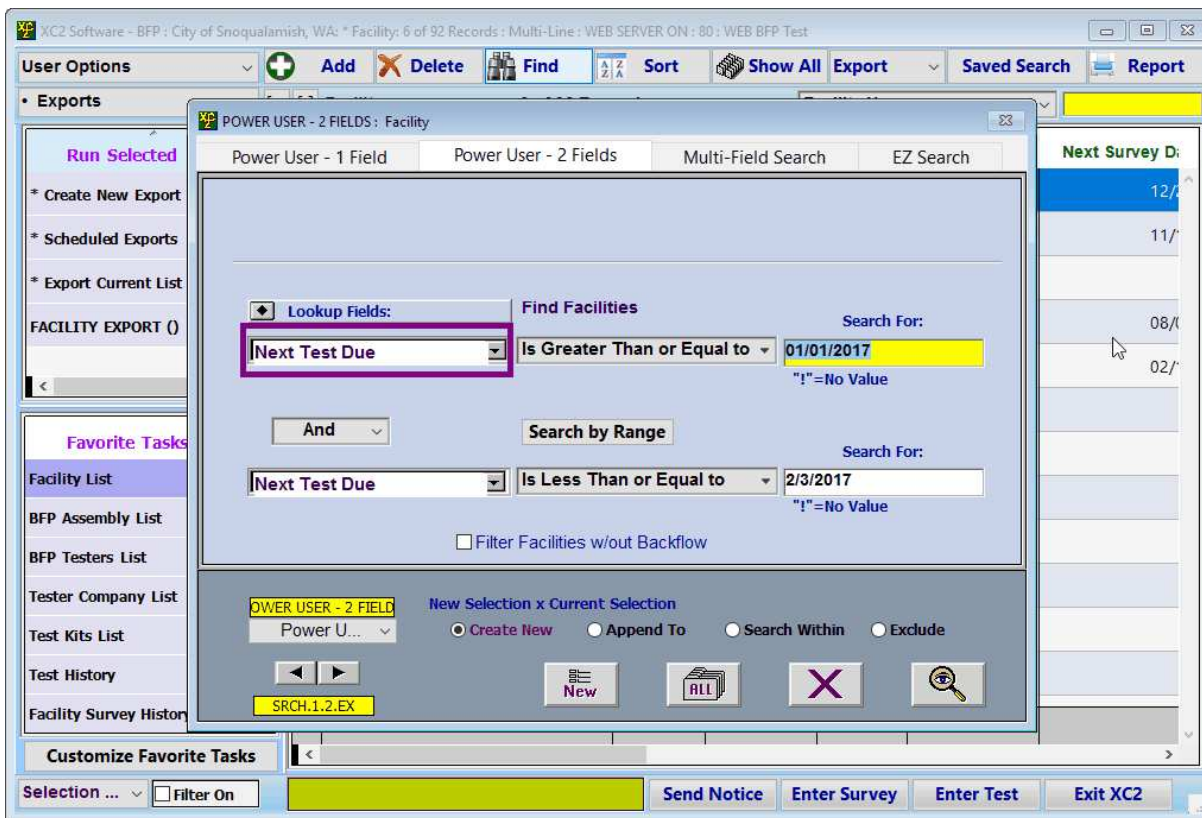
Search for records that you would like to send notices to

When you send notices manually you need to search for your records

Common fields used to find the records includes

- 1) Next Test Due Date
- 2) Response Date
- 3) Schedule code

Here I am performing a search for next test due date



Notes:

Click Send Notices

Once you have the list of records that you would like to send notices to, click send notices

The screenshot shows the XC2 Software interface for the City of Snoqualamish, WA. The window title is "XC2 Software - BFP : City of Snoqualamish, WA: * Facility: 6 of 92 Records : Multi-Line : WEB SERVER ON : 80 : WEB BFP Test". The interface includes a menu bar with options like Add, Delete, Find, Sort, Show All, Export, Saved Search, and Report. Below the menu bar, there's a search bar for "Facility" with "6 of 92 Records" displayed. A table lists facilities with columns for #, Facility Name, Addr (#), Street, Site Qty, Sched Code, and Next Survey Date. A red arrow points to the "Send Notice" button in the bottom toolbar, which is also highlighted with a red box. Other buttons in the toolbar include "Enter Survey", "Enter Test", and "Exit XC2".

#	Facility Name	Addr (#)	Street	Site Qty	Sched Code	Next Survey Date
1	RAINBOW REBUILDERS	6694	ABBOTSFORD	7	01-Jan	12/2017
2	DEL-OLLIE'S ROUNDUP ----- CHANGE	9451	BANBRIDGE	1	01-Jan	11/2017
3	FINNIGANS BELL PEPS	22222	BELL	6	01-Jan	
4	TAFOYA ELECTRIC CHANGE	1795	CHURCH VIEW	1	01-Jan	08/2017
5	SENIORS IN COMMUNITY LIVING INC	9095	GREYSON	2	01-Jan	02/2018
6	TEST FACILITY	123	MAIN	15	01-Jan	
				30		

Notes:

One or all records

confirm records



Notes:

Choose Notice

Letter Wizard : Records Selected : 1 : Facility : RAINBOW REBUILDERS : 6694 S ABBOTSFORD WAY

Send One Notice per: Facility		Send One Notice per: BFP Assembly	
Letter Name	Response Code		
TEST DUE #1	30 LTR_1		
TEST DUE #2	15 LTR_2		
TEST DUE #3	20 LTR_3		
TEST DUE #4 SHUT OFF	3 LTR_4		
FAILED TEST NOTICE 1	14 LTR_1		
FAILED TEST NOTICE 2	7 LTR_2		

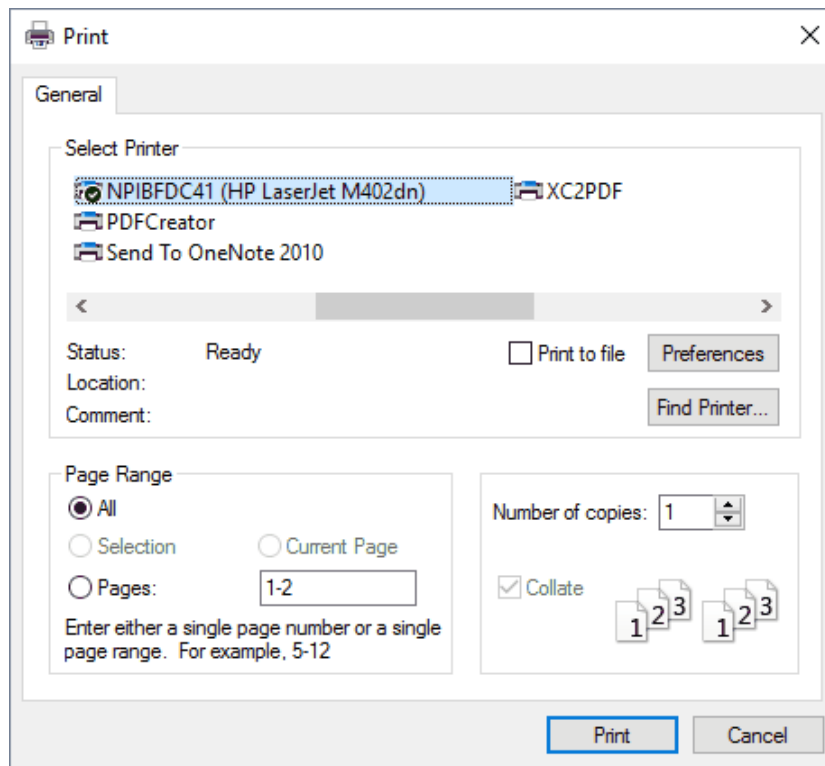
This will print all Facility records currently in the list. schedule code

Letter Sent/Mailed Date: Response Days: Response Due Date: Qty Letters to Send:

Exclude Facilities: "No Notice" **X - Not an Email Notice**

Notes:

Choose Printer



Notes:

Confirm Action

All letters should be printed.

Look over your letters. -- Did they print ok? Was the letter setup correctly?

Click Yes if they printed correctly.

If you click yes, XC2 will assign a response due date to the backflow assembly.

You will use this response due date to track the notice

Confirm Action

! Confirm Action CONFIRM_1

Did the Letters/Notices print OK?

Font Size 15 [Zoom In] [Zoom Out] No Yes

Notes:

You will be directed back to your list of records

The screenshot shows the XC2 Software interface for the City of Snoqualamish, WA. The window title is "XC2 Software - BFP : City of Snoqualamish, WA: * Facility: 6 of 92 Records : Multi-Line : WEB SERVER ON : 80 : WEB BFP Test". The main area displays a table of facilities with the following columns: #, Facility Name, Addr (#), Street, Site Qty, Sched Code, and Ne. The table contains six rows of data, with a total of 32 records indicated at the bottom. The interface includes a menu bar with options like Add, Delete, Find, Sort, Show All, Export, Saved Search, and Report. A sidebar on the left contains "Favorite Tasks" and "Customize Favorite Tasks". At the bottom, there are buttons for "Send Notice", "Enter Survey", "Enter Test", and "Exit XC2".

#	Facility Name	Addr (#)	Street	Site Qty	Sched Code	Ne
	RAINBOW REBUILDERS	6694	ABBOTSFORD	7	01-Jan	
	DEL-OLLIE'S ROUNDUP ----- CHANGE	9451	BANBRIDGE	1	01-Jan	
	FINNIGANS BELL PEPS	22222	BELL	6	01-Jan	
	TALOYA ELECTRIC CHANGE	1795	CHURCH VIEW	1	01-Jan	
	SENIORS IN COMMUNITY LIVING INC	9095	GREYSON	2	01-Jan	
	TEST FACILITY	123	MAIN	15	01-Jan	
				32		

Notes:



XC2 Software Knowledge Base



How Automatic Notices Tracks When Tests Are Due

KB Asset ID: 2257

This page describes how Automatic Notices in XC2 tracks Backflow Assembly Test Due Dates and Response Dates.

Automatic Notices Screen

The purpose of Automatic Notices in XC2 is to simplify the process of sending notices by having XC2 track which assemblies are due to be tested and which facilities need to receive a notice.

Here is an example of XC2's Automatic Notices Screen:

39 Facilities need to be sent a 1st Notice

9 Facilities need to be sent a 2nd Notice

2 Facilities need to be sent a 3rd Notice

Automatic Test Due Notices
Help/Info

Automatic Notices - Test Due Notification
Help/Info

	BFPs	Facilities	
Backflow Prevention Assemblies Due for First Notice	47	39	<input checked="" type="radio"/> Send First Notices
Next Test Date within Number of Days:	30		Show Me ▼
Backflow Prevention Assemblies Requiring a Second Notice	12	9	<input type="radio"/> Send Second Notices
Backflow Prevention Assemblies Requiring a Third Notice	2	2	<input type="radio"/> Send Third Notices
Backflow Prevention Assemblies Requiring a 4th Notice	0	0	<input type="radio"/> Send 4th Notices
Backflow Prevention Assemblies Requiring a 5th Notice	0	0	<input type="radio"/> Send 5th Notices
Backflow Prevention Assemblies Requiring a 6th Notice	0	0	<input type="radio"/> Send 6th Notices

Put Notices in Order by: Facility Name ▼
 Send All Notices

Send Via Email - For Those Designated
 Letter Sent/Mailed Date: 01/20/2014
Response Due Date: 02/19/2014

Record in History, but Don't Print at All
Cancel
Print Notices

Notes:

How Does it Work?

Automatic Notices looks at 2 items to determine what is due to be tested and what is overdue to be tested.

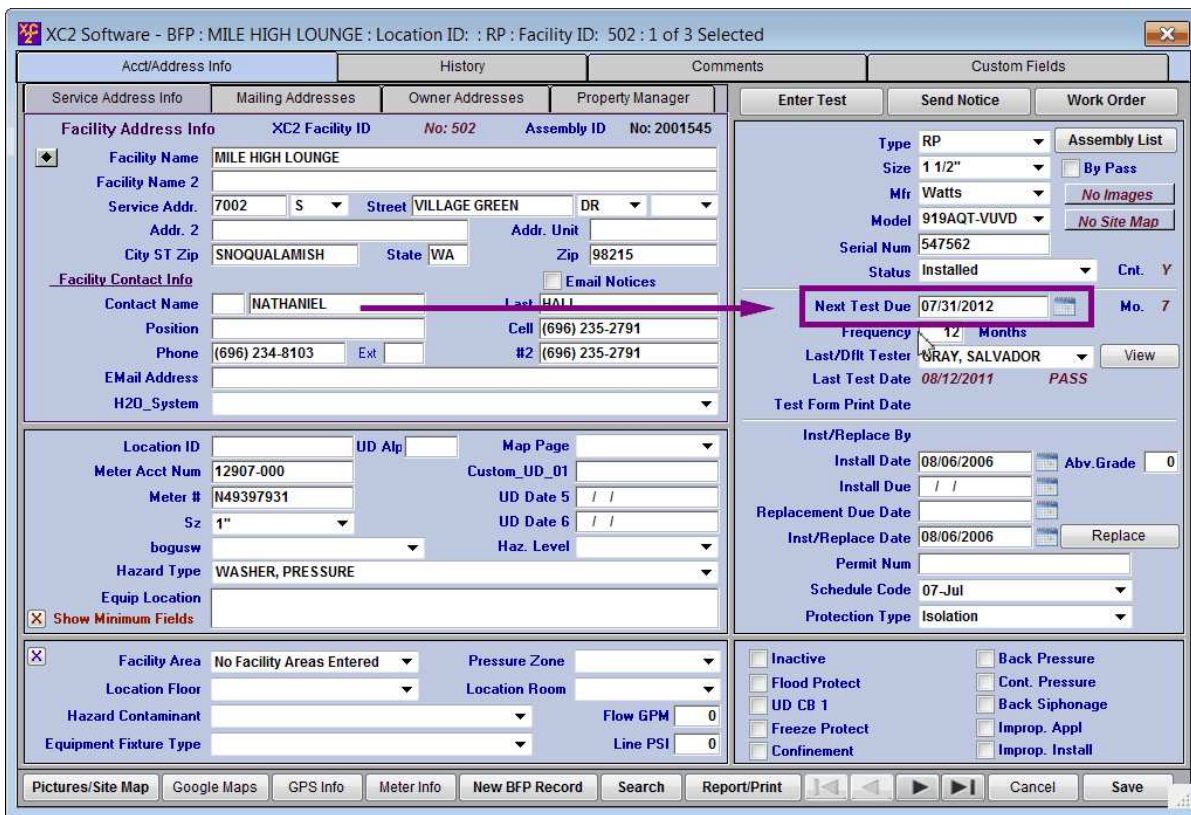
- 1) Next Test Due Date
- 2) Response Due Date

Next Test Due Date

The Next Test Due Date can be found in the Assembly Record.

This is the date the assembly is due to be tested.

Automatic Notices Uses Next Test Due Date to determine when the First Notification needs to be printed.



Notes:

When are 1st Notices Due?

By default, XC2 will look 30 Days in advance for Next Test Due Dates.

If XC2 finds an assembly that will be due within 30 Days **or** is currently overdue, it will appear in this list.

Here 47 assemblies are either past their Next Test Due Date, or are approaching their Next Test Due date within 30 Days.

Automatic Test Due Notices

Automatic Notices - Test Due Notification Help/Info

	BFPs	Facilities	
Backflow Prevention Assemblies Due for First Notice	47	39	<input checked="" type="radio"/> Send First Notices
Next Test Date within Number of Days:	30		Show Me
Backflow Prevention Assemblies Requiring a Second Notice	12	9	<input type="radio"/> Send Second Notices
			Show Me
Backflow Prevention Assemblies Requiring a Third Notice	2	2	<input type="radio"/> Send Third Notices
			Show Me
Backflow Prevention Assemblies Requiring a 4th Notice	0	0	<input type="radio"/> Send 4th Notices
			Show Me
Backflow Prevention Assemblies Requiring a 5th Notice	0	0	<input type="radio"/> Send 5th Notices
			Show Me
Backflow Prevention Assemblies Requiring a 6th Notice	0	0	<input type="radio"/> Send 6th Notices
			Show Me

Put Notices in Order by: Facility Name Send All Notices

Send Via Email - For Those Designated

Letter Sent/Mailed Date: 01/20/2014
Response Due Date: 02/19/2014

Record in History, but Don't Print at All Cancel Print Notices

Notes:

Response Due Dates

Response Due Dates are Used to Track Follow-Up Notices in XC2.

Response Due Dates are created in the Assembly Record after a notice has been sent.

The screenshot shows the 'XC2 Software' interface for 'BFP Assembly History' of 'R L PLIMPTON ASSOC INC'. The 'Notice Information' section includes fields for 'Response Due' (12/31/2013), 'Respond To' (TEST DUE #1), 'Next Test Due' (09/30/2012), 'Last Test Date' (10/15/2011), and 'Last/Dflt Tester' (COLLINS, GLEN). A 'Test History' table is also visible, listing past tests with columns for Date, Code, By, CV1, RV, and Final.

Date	Code	By	CV1	RV	Final
10/15/2011	PASS	COLLINS, GLEN	6.8	3.1	
09/14/2010	PASS	COLLINS, GLEN	6.8	2.8	
09/18/2009	PASS	COLLINS, GLEN	9.2	5.4	
09/09/2008	PASS	RINCKLE, KAPLIN	8.9	5.9	

Notes:

Follow-up Notices

When an assembly passes the Response Date, the assembly will be due for a Followup Notice

9 Facilities are due for a Second Notice

2 Facilities are due for a Third Notice

Automatic Test Due Notices

Automatic Notices - Test Due Notification Help/Info

	BFPs	Facilities	
Backflow Prevention Assemblies Due for First Notice	47	39	<input checked="" type="radio"/> Send First Notices
Next Test Date within Number of Days:	30		Show Me
Backflow Prevention Assemblies Requiring a Second Notice	12	9	<input type="radio"/> Send Second Notices
Backflow Prevention Assemblies Requiring a Third Notice	2	2	<input type="radio"/> Send Third Notices
Backflow Prevention Assemblies Requiring a 4th Notice	0	0	<input type="radio"/> Send 4th Notices
Backflow Prevention Assemblies Requiring a 5th Notice	0	0	<input type="radio"/> Send 5th Notices
Backflow Prevention Assemblies Requiring a 6th Notice	0	0	<input type="radio"/> Send 6th Notices

Put Notices in Order by: Facility Name Send All Notices

Send Via Email - For Those Designated

Letter Sent/Mailed Date: 01/20/2014
Response Due Date: 02/19/2014

Record in History, but Don't Print at All Cancel Print Notices

Notes:



XC2 User Manual Backflow History

- **Parts of the Backflow History Lists**
- **Searching Backflow History**
- **Adding Entry Method to Your Backflow History List**
- **How to View Modification History**



XC2 Software Knowledge Base



Backflow Assembly History List

KB Asset ID: 3616

This page is an overview of the backflow assembly history list view

This is XC2's BFP History Table

Here 4 types of records are held in the table

- 1) Test Records
- 2) Letter Records
- 3) Repair Records
- 4) Work Order Records

The records are separated by tabs and each tab can be searched.

#	Event Date	Service Address	Code	Mfr	Type	Size	Serial Num
2	03/03/16	123 MAIN	PASS	WATTS	RP	2 1/2"	1008
3	03/21/16	123 MAIN	PASS	Ames	DC	1 1/2"	1009
4	09/09/16	123 MAIN ST	PASS	WILKINS	RP	10"	
5	03/21/16	123 MAIN ST	PASS	WILKINS	RP	10"	
6	03/16/16	123 S WEST WAY	PASS		RP	2"	
7	08/30/16	123 TEST RD	PASS	Watts	DCDA	6"	2525
8	08/31/16	123 TEST RD	FAIL/PASS	Watts	DCDA	6"	2525
9	05/06/16	123 WEST WAY	PASS	Watts	DCDA	2 1/2"	829932
10	03/16/16	123 WEST WAY	PASS		DCDA	2 1/2"	
11	06/02/16	1583 W KIM RD	PASS	FEBCO	RP	3"	2001033
12	09/14/16	1795 S CHURCH VIEW CT	FAIL	Watts	DCDA	2"	608656
13	06/02/16	22222 BELL	PASS	Watts	DC	1/2"	777

Notes:

Tabs

Click a Tab to select a different record area

The screenshot shows the XC2 Software interface. At the top, there are menu options: Add, Delete, Find, Sort, Show All, Export, Saved Search, and Report. Below this is a main page header with 'Equip History Letter' and '208 of 913 Records'. A search field is labeled 'Find: Facility Name'. The main area contains a table with columns: #, Facility Name, Assembly ID, Sent Date, and Letter Name. The 'Letters' tab is highlighted with a purple box. A purple arrow points to the first row of the table.

#	Facility Name	Assembly ID	Sent Date	Letter Name
2	A-QUEST ELECTRONICS	2002529	03/14/16	TEST DUE #1
3	CHILDREN'S HOSPITAL	2002926	03/23/16	INSTALLATION NOTICE #1
4	JOHNS GRILL	2004726	03/23/16	INSTALLATION NOTICE #1
5	LITTLETON GARAGE DOOR SERVICE	2000295	03/23/16	INSTALLATION NOTICE #1
6	RAINBOW REBUILDERS	2000344	03/23/16	INSTALLATION NOTICE #1
7	RAINBOW REBUILDERS	2004667	03/23/16	INSTALLATION NOTICE #1
8	STOREWISE SOFTWARE INC	2000406	03/23/16	INSTALLATION NOTICE #1
9	1POLYMEDICA INDUSTRIES INC	2000445	03/23/16	TEMPLATE (SINGLE)
10	**LITTLE CEASARS PIZZA ----- CHANGE	2002231	03/23/16	TEMPLATE (SINGLE)
11	A-QUEST ELECTRONICS	2002529	03/23/16	TEMPLATE (SINGLE)
12	1LAKEWOOD FAMILY MEDICAL CLINIC PC	2000410	03/23/16	TEMPLATE (SINGLE)
13	1PECK DORAN P C	2000491	03/23/16	TEMPLATE (SINGLE)

Notes:



XC2 Software Knowledge Base



How to Search BFP Test History

KB Asset ID: 3217

This page describes how to search through historical test data in XC2 Backflow.

Test History

The BFP Test History can be accessed directly from the main screen.

To view test history, click Test History on the main screen.

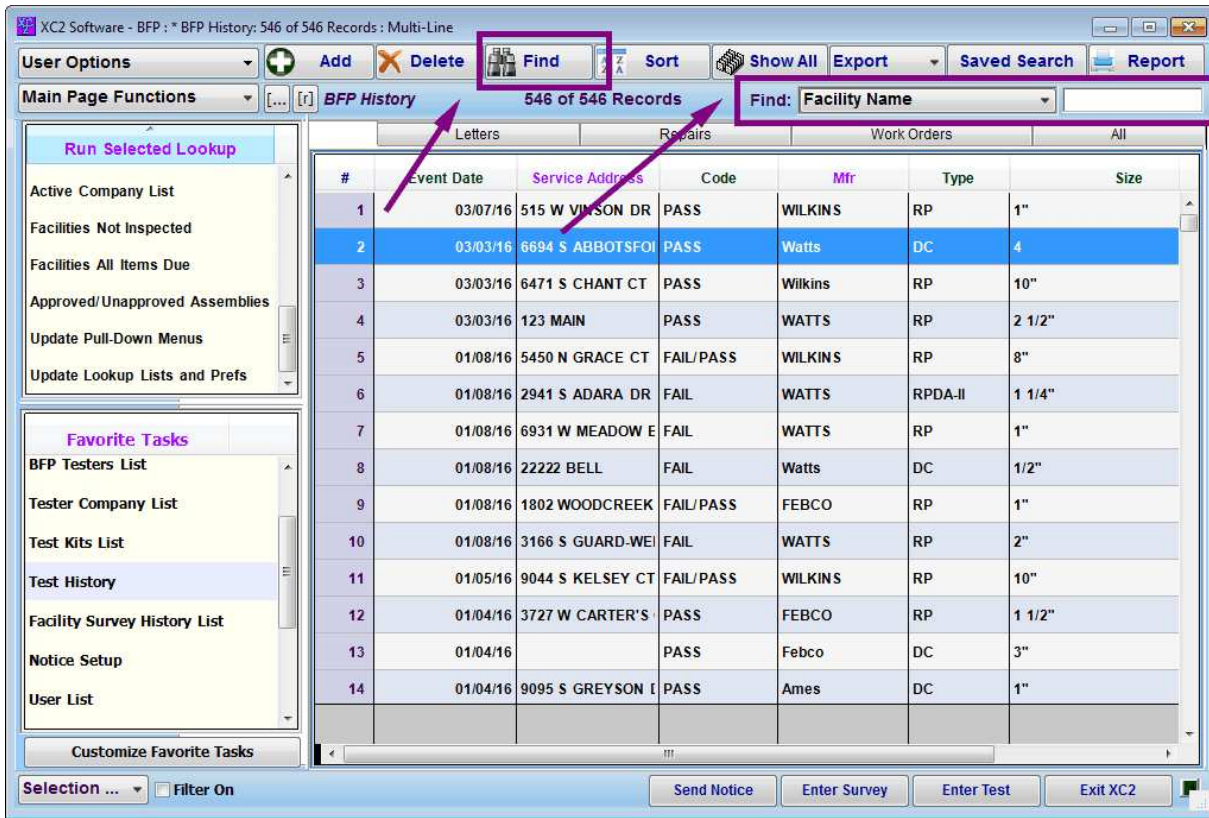
The screenshot shows the 'XC2 Software - BFP : * BFP History: 546 of 546 Records : Multi-Line' window. The main area displays a table of test records with columns for #, Event Date, Service Address, Code, Mfr, Type, and Size. A sidebar on the left contains 'Run Selected Lookup' and 'Favorite Tasks' sections. The 'Test History' option in the 'Favorite Tasks' section is highlighted with a purple box, and a purple arrow points to it from the table area.

#	Event Date	Service Address	Code	Mfr	Type	Size
1	03/07/16	515 W VINSON DR	PASS	WILKINS	RP	1"
2	03/03/16	6694 S ABBOTSF	PASS	Watts	DC	4
3	03/03/16	6471 S CHANT CT	PASS	Wilkins	RP	10"
4	03/03/16	123 MAIN	PASS	WATTS	RP	2 1/2"
5	01/08/16	5450 N GRACE CT	FAIL/PASS	WILKINS	RP	8"
6	01/08/16	2941 S ADARA DR	FAIL	WATTS	RPDA-II	1 1/4"
7	01/08/16	6931 W MEADOW E	FAIL	WATTS	RP	1"
8	01/08/16	2222 BELL	FAIL	Watts	DC	1/2"
9	01/08/16	1802 WOODCREEK	FAIL/PASS	FEBCO	RP	1"
10	01/08/16	3166 S GUARD-WEI	FAIL	WATTS	RP	2"
11	01/05/16	9044 S KELSEY CT	FAIL/PASS	WILKINS	RP	10"
12	01/04/16	3727 W CARTER'S	PASS	FEBCO	RP	1 1/2"
13	01/04/16		PASS	Febco	DC	3"
14	01/04/16	9095 S GREYSON L	PASS	Ames	DC	1"

Notes:

Searching Through History

You can search through your test history by clicking the Find button at the top of the screen or by typing directly into the search bar on the top right.



Notes:

Choose Your Search Parameters

There are many different search options available.

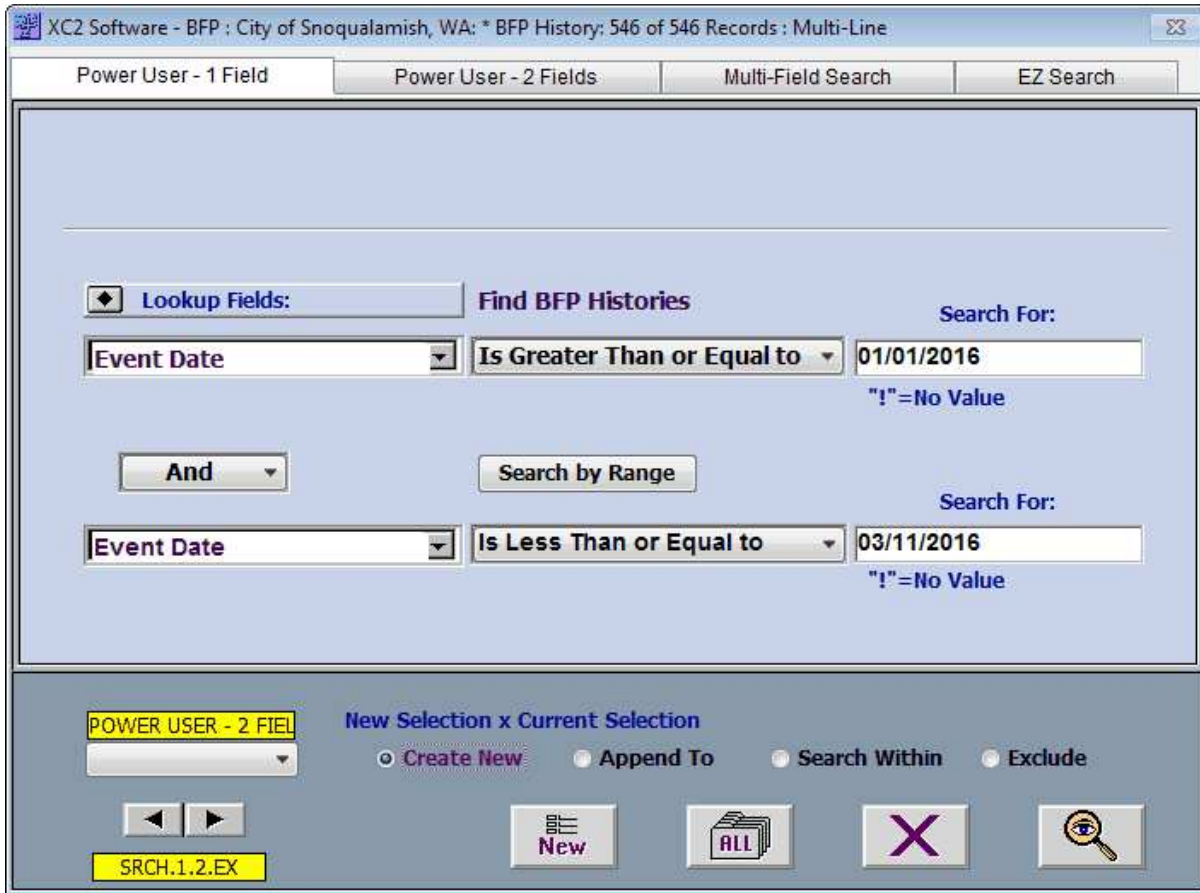
Choose the parameters that fit your needs.

One of the most common searches performed in test history is searching by a date range.

Below I want to find all tests completed within a specific Date Range.

Event Date = Test Date

Click the magnifying glass to search.



Notes:

Search Results

After clicking the search button a list of test records will be visible.

From here you can open individual test records, make changes, print or even move the records.

The screenshot shows the 'BFP History' window in XC2 Software. The window title is 'XC2 Software - BFP : * BFP History: 17 of 546 Records : Multi-Line'. The interface includes a toolbar with 'Add', 'Delete', 'Find', 'Sort', 'Show All', 'Export', 'Saved Search', and 'Report' buttons. Below the toolbar, there are 'Main Page Functions' and a search field for 'Facility Name'. The main area contains a table with 14 records. On the left, there are two panels: 'Run Selected Lookup' with options like 'Active Company List' and 'Facilities Not Inspected', and 'Favorite Tasks' with options like 'BFP Testers List' and 'Test History'. At the bottom, there are buttons for 'Send Notice', 'Enter Survey', 'Enter Test', and 'Exit XC2'.

#	Event Date	Service Address	Code	Mfr	Type	Size
1	01/01/16	7210 WEST VIEW D	FAIL/PASS	WATTS	RP	4"
2	01/04/16	123 S WEST WAY	INC	Hersey	RP	2"
3	01/04/16	3727 W CARTER'S	PASS	FEBCO	RP	1 1/2"
4	01/04/16	9095 S GREYSON I	PASS	Ames	DC	1"
5	01/04/16	6694 S ABBOTSFOL	PASS	Arrowhead Br	AVB	1/2"
6	01/04/16		PASS	Febco	DC	3"
7	01/05/16	9044 S KELSEY CT	FAIL/PASS	WILKINS	RP	10"
8	01/08/16	6931 W MEADOW E	FAIL	WATTS	RP	1"
9	01/08/16	3166 S GUARD-WEI	FAIL	WATTS	RP	2"
10	01/08/16	5450 N GRACE CT	FAIL/PASS	WILKINS	RP	8"
11	01/08/16	2941 S ADARA DR	FAIL	WATTS	RPDA-II	1 1/4"
12	01/08/16	22222 BELL	FAIL	Watts	DC	1/2"
13	01/08/16	1802 WOODCREEK	FAIL/PASS	FEBCO	RP	1"
14	03/03/16	6471 S CHANT CT	PASS	Wilkins	RP	10"

Notes:



Adding Entry Method to Test History List

KB Asset ID: 3422

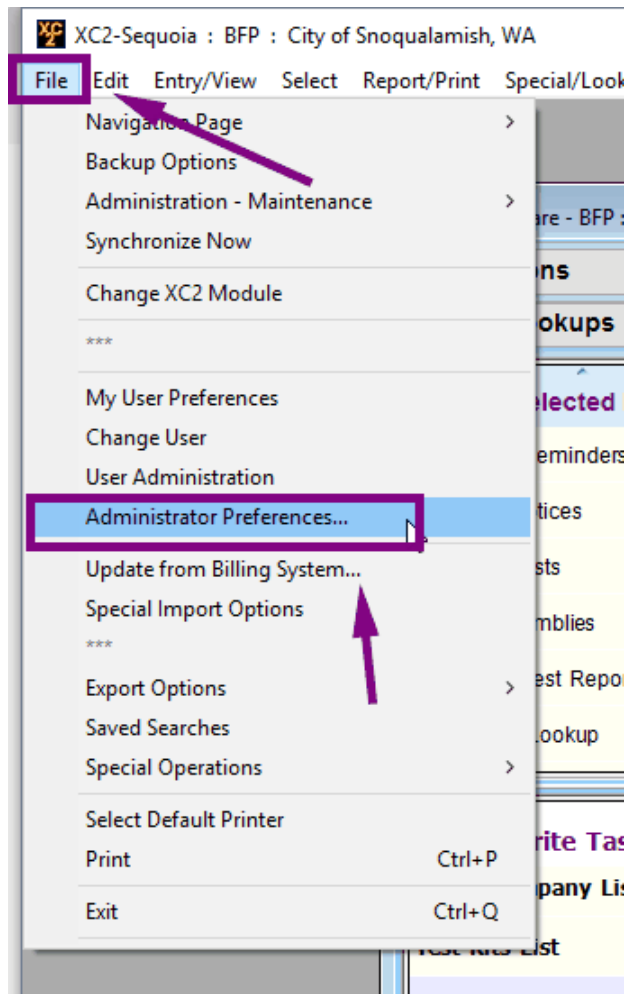
This page describes how to add Entry Method list to your Test History List.

This can be especially useful when using XC2 Web Test entry to determine what method was used to enter the test.

Adding Entry Method to Test History List

To Add Entry Method, open Administrator Preferences

Click File ---> Administrator Preferences



Notes:

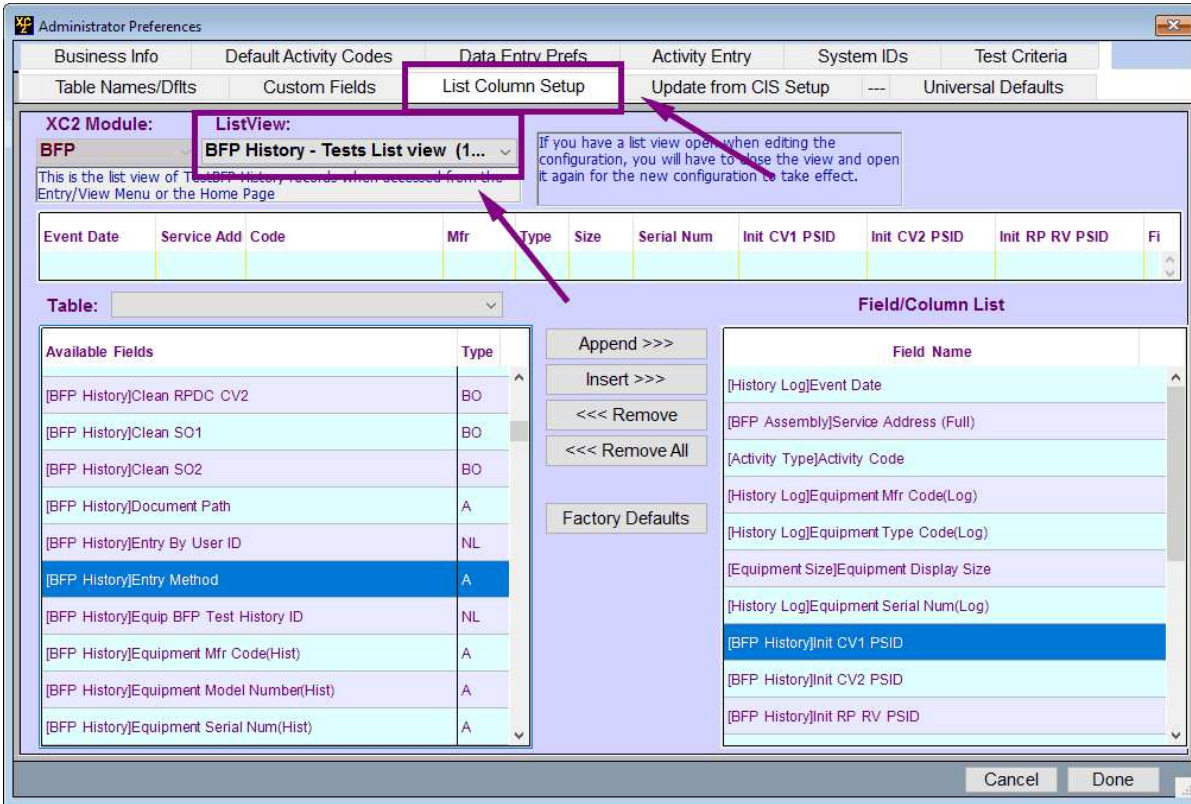
Administrator Preferences

Inside Administrator Preferences select

List Column Setup

Then

BFP History - Tests List View



Notes:

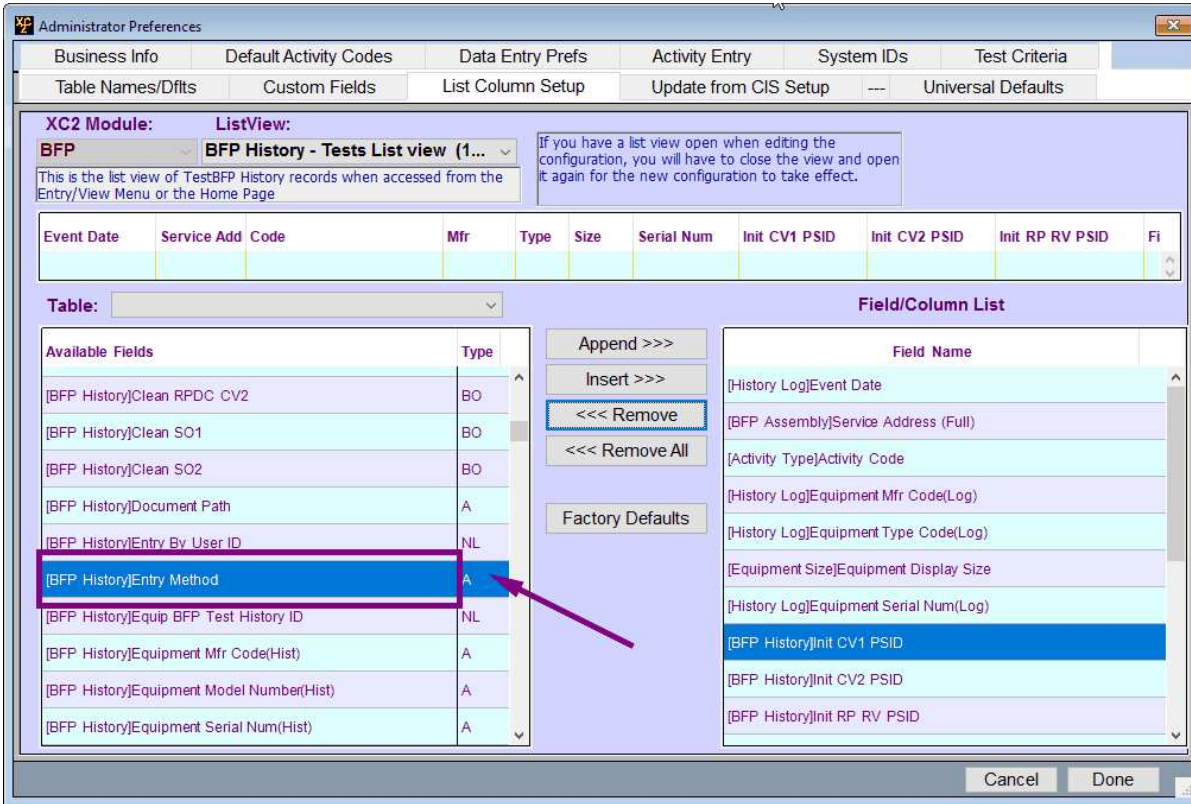
Add Entry Method To Your List

Add Entry Method To Your List

[BFP History] Entry Method

Double click to add the field to your Test List

Note: Fields are in alphabetical order



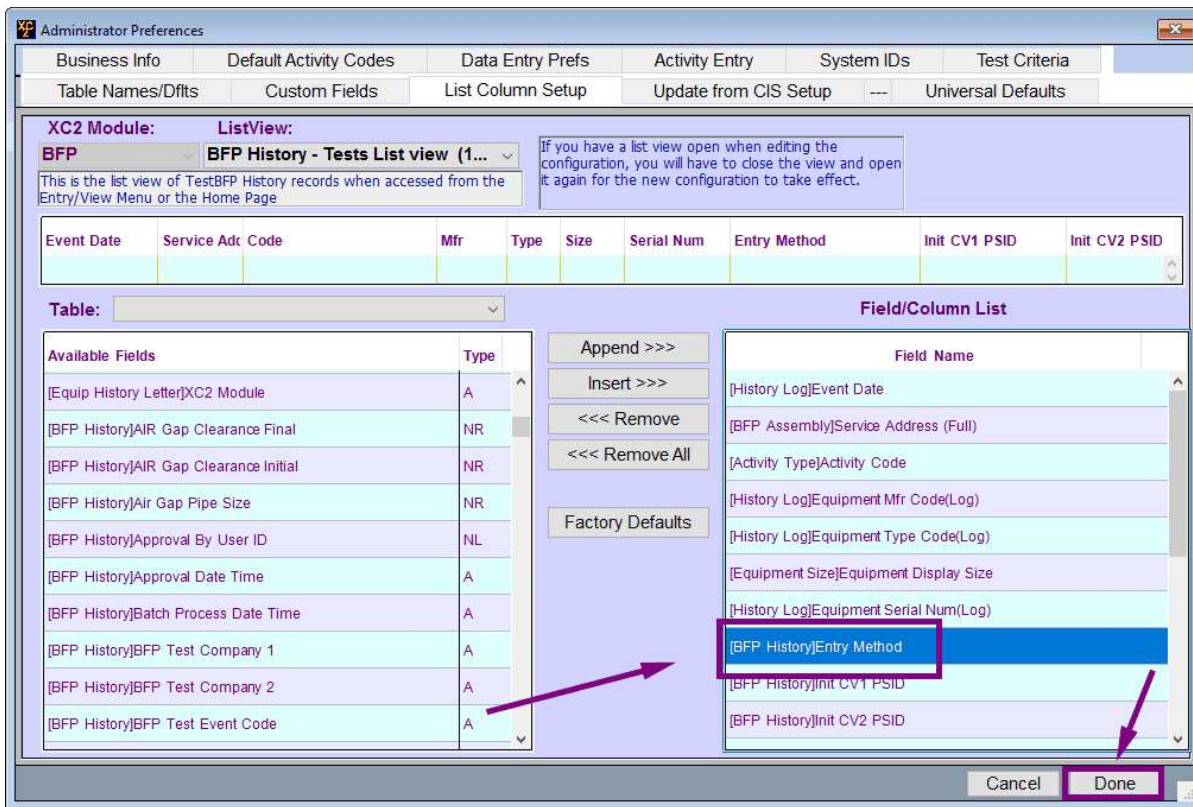
Notes:

Adjusting Field In the List

You may want to move the field.

Drag the field up to your desired space.

Click Done to Save



Notes:

Entry method will be added to your list view

Entry Method will be added to your list view

#	Event Date	Service Address	Code	Mfr	Type	Size	Serial Num	Entry Method	Init CV1 F
1	05/01/16	881 S FAW	PASS	WATTS	RP	1 1/2"	111819	Web: Chrome	
2	02/01/16	63 ELLIS S	PASS	Watts	DCDA	10"	555	Web: Chrome	
3	03/21/16	123 MAIN	PASS	Ames	DC	1 1/2"	1009	Web: Chrome	

Notes:



How to View BFP Modification History

KB Asset ID: 3320

This page describes how to view the modification history for individual test records

Modification History Record

Each Test Record has its own modification record

Some of the items recorded include

- 1) Date the Test Was Entered
- 2) Changes to Test Values
- 3) Who made the change
- 4) Which Computer the Change Was Made On
- 5) Time of Change

Here is an example of a Backflow Test Modification History Record

BFP History : A FLAG HOUSE : 2001033 : 06/02/16 : 11:39 AM

Modification History

Table Main Info BFP History : A FLAG HOUSE : 2001033

Table	BFP History	ID	11038015
Modification Date	06/02/2016	Time	11:39 AM
Computer	XC2-2015	By	DESIGNER
Record Info	A FLAG HOUSE : 2001033		
Summary	New Record Entered : New Record Entry		

Field Modifications

Field	Previous	New
Facility Account Number(Hist)		9315-000
Event Date	00/00/00	6/2/2016
Event Code ID	0	1001
Initial Tester ID	0	100004
Equip BFP Test History ID	0	11038015
Test Result Status		PASS

Description

Facility Account Number(Hist) : 9315-000

Restore Record Text Description Print << < > >> Cancel Save

Notes:

Open Test Record

The modification history of a test record is stored within the Assembly Test History table

There are a couple of ways to get there

- 1) From the BFP History Table
- 2) From Within a Backflow Assembly Record

This tutorial will show you how to view BFP Test Modification History through the BFP Assembly Record

Open a Backflow Assembly Record

Open a Record of a Backflow Assembly

Inside of the Backflow Assembly Record

Click the History Tab

The screenshot shows the 'XC2 Software - BFP : A FLAG HOUSE : Location ID: 651 : RP : Facility ID: 309 : 10 of 110 Selected' window. The 'History' tab is selected and highlighted with a purple box. A purple arrow points to the 'History' tab. The interface is divided into several sections:

- Facility Address Info:** Facility Name: A FLAG HOUSE, Service Addr: 4880 N BEECH RIDGE DR, City: SNOQUALAMISH, State: WA, Zip: 98215.
- Facility Contact Info:** Contact Name: JERRELL, Last: HILL, Cell: (696) 235-1507, Phone: (696) 235-5894, EMail Address: JAN.SAXTON@XC2SOFTWARE.COM.
- Location ID:** Meter Acct Num: 16625-000, Meter #: N60102239, Sz: 1:1/2, Service Type: AIR CONDITIONING SYSTEM.
- Test Parameters:** Type: RP, Size: 6, Mfr: Watts, Model: 909, Status: Installed, Next Test Due: 02/28/2018, Frequency: 12 Months, Last/Dflt Tester: GLEN COLLINS, Last Test Date: 12/07/2015, Test Form Print Date.
- Inst/Replace By:** Install Date, Install Due, Replacement Due Date, Inst/Replace Date, Permit Num, Schedule Code: 02-Feb, Protection Type: Containment.
- Options:** Inactive, Flood Protect, UD CB 1, Freeze Protect, Confinement, Back Pressure, Cont. Pressure, Back Siphonage, Impropr. Appl, Impropr. Install.

Notes:

Test History

The first tab is the test History for that Backflow Assembly

Double click on the test record to open a record

BFP Assembly History A FLAG HOUSE

Notice Information

Response Due: 04/24/2016 Clear Response Date Letter ID: 2090

Respond To: TEST DUE #1 03/25/2016

Next Test Due: 01/04/2017 Frequency: 12 Last Test Date: 01/04/2016

Previous Serial Number: _____

Notice Date 1: 03/25/2016
 Notice Date 2: 00/00/0000
 Notice Date 3: 00/00/0000
 Notice Date 4: 00/00/0000
 Equip Notice Date 05: 00/00/0000
 Equip Notice Date 06: 00/00/0000

Test History

Date	Code	By	CV1	CV2	Final	Date	CV1	CV2	Meter
01/04/2016	PASS	ENRICO ALBINONI	8.00	5.00					

Buttons: Delete Item, View Letter, View Results, Enter Test, ASSY.05.3

Bottom Bar: Pictures/Site Map, MapPoint, GPS Info, Meter Info, New BFP Record, Search, Report/Print, Cancel, Save

Notes:

Test Record

Here is the Test Record

In the bottom left corner of the test record is the Modification History button

Click Mod History

XC2 Software - BFP : A FLAG HOUSE : Location ID: : DC : Last Test: 1/4/2016 : PASS : 01/04/2016

Test Results		Type: <input type="text" value="DC"/>	Size: <input type="text" value="3"/>	SN: <input type="text" value="Serial Number"/>	Last Test: <input type="text" value="01/04/2016"/>
Test Code: <input type="text" value="PASS"/>	Mfr: <input type="text" value="Febco"/>	Model: <input type="text" value="750N-VUVD"/>	RP Buffer: <input type="text" value="3.0"/>		
Equip Location: <input type="text"/>					

	Check Valve #1	Check Valve #2	Shut-Off #1 & #2
Initial Test <input type="button" value="Test - Pass/Fail"/> TEST_RPT_06_LG_01	Held At: <input type="text" value="8"/> <input checked="" type="checkbox"/> Closed Tight <input type="checkbox"/> Leak <input type="checkbox"/> Cleaned	Held At: <input type="text" value="5"/> <input checked="" type="checkbox"/> Closed Tight <input type="checkbox"/> Leak <input type="checkbox"/> Cleaned	Closed: <input type="checkbox"/> <input type="checkbox"/> Leaked: <input type="checkbox"/> <input type="checkbox"/> Meter Stop: <input type="checkbox"/> <input type="checkbox"/> Cleaned: <input type="checkbox"/> <input type="checkbox"/>

Tester: <input type="text" value="Initial"/>	Tester Name: <input type="text" value="ENRICO ALBINONI"/>	Company Name: <input type="text" value="CITY OF SNOQUALAMISH"/>	Pass/Fail: <input type="text" value="Pass"/>	Date: <input type="text" value="01/04/2016"/>
--	---	---	--	---

Comments:

History UD 01:

History UD 02:

Charges

Initial:

Final:

Repair:

Parts:

Totals:

Don't Calculate

Notes:

Full Modification History

Here is the full modification history of that test in a list view

Here you can see basic information

- 1) Who did the modification
- 2) The date it took place
- 3) The time it took place
- 4) What Occured

If you would like more information about a specific event, double click on a record.

Modification History : A FLAG HOUSE : Serial Number

Modification History

Entry DESIGNER 01/04/2016 : 00:00:00

Last Modification DESIGNER 2016/01/04 : 11:34 AM

Modification History

User	Date	Time	Notes
DESIGNER	01/04/2016	11:34 AM	: Test Entry
DESIGNER	01/04/2016	11:34 AM	New Record Entered : New Record Entry

Done

Notes:

Details About a Certain Event

Inside of each Modification History record will show what modification occurred and who did it

Click Save or Cancel to close the screen

BFP History : A FLAG HOUSE : Serial Number : 01/04/16 : 11:34 AM

Modification History

Table Main Info	BFP History : A FLAG HOUSE : Serial Number		
Table	BFP History	ID	11037841
Modification Date	01/04/2016	Time	11:34 AM
Computer	SALES-PC	By	DESIGNER
Record Info	A FLAG HOUSE : Serial Number		
Summary	New Record Entered : New Record Entry		

Field Modifications

Field	Previous	New
Facility Account Number(Hist)		9315-000
Event Date	00/00/00	1/4/2016
Event Code ID		1001

Description

=====
 =====
 Facility Account Number(Hist) : 9315-000

Notes:

Click Done to Close the Record

Modification History : A FLAG HOUSE : Serial Number

Modification History

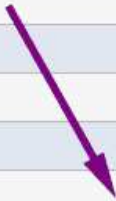
Entry DESIGNER 01/04/2016 : 00:00:00

Last Modification DESIGNER 2016/01/04 : 11:34 AM

Modification History

User	Date	Time	Notes
DESIGNER	01/04/2016	11:34 AM	: Test Entry
DESIGNER	01/04/2016	11:34 AM	New Record Entered : New Record Entry

Done



Notes:



XC2 User Manual

Surveys

- **Survey Setup Options**
- **The Survey Screen**
- **Entering Surveys**
- **Detailed Survey Items**
- **When a Survey Is Complete**
- **Scanning Images into a Survey Record**
- **Adding Pictures to Survey**



XC2 Software Knowledge Base



16 - Surveys - Entry Options

KB Asset ID: 3581

How detailed do you need your survey entries to be?

Simple Survey Entry Screen

The Basics:

- Date of survey
- Inspectors Name
- Survey Status
- Survey Items Found
- Comments

XC2 Software - BFP : New Survey Record: First Baptist Church : 8015 W Adams AVE

Survey Entry Entry Date: 02/16/17 By: Designe 1000001

Facility Name	First Baptist Church	Acct Number	
Facility Name 2		Meter Number	
Service Address	8015 W Adams AVE	Location ID	
Survey Date	?	Service Address Ct	Temple
Survey By		Hazard	
Service Type	Commercial	Event Code	
Next Inspection	/ /	Survey Status	In Process
Compliance Date	/ /	<input type="checkbox"/> Back Pressure	<input type="checkbox"/> Back Siphonage
Notice Response Due		ID #	0
Letter Name		FAC_SURVEY.01.RSZ	Freq. 0
		Next Survey Date	/ /

Hazard Selection List

- Airport
- Athletic Fields

Survey Item Found

 <<< Remove fra...
 <<< Remove All User Defined Entry

Survey Comments Deficiencies Recommendations Correctic < >

Survey Comments Boiler Plate

Notes:

Detailed Survey Entry

The detailed survey entry page has all the information that the Basic entry screen has and more

Additional Areas Available

- Detail, Inspection, and Notice History
- Survey Checklist
- Hazrd List
- Site Map
- User Defined (user customizable) Fields
- Associated Assembly List
- Project Plan Checklist

XC2 Software - BFP: New Survey Record: First Baptist Church : 8015 W Adams AVE

Survey Entry	Facility Name First Baptist Church	Entry 02/16/17
ID # 10000002	Service Address 8015 W Adams AVE	By Designer

Survey Information | Detail/Inspections/Notices | Survey Check List | Hazard List | Site Map | User Defined | BFP Assembly List | Project - Plan Check

Initial Date Time

Inspection By

Event Code

Survey Status In Process

Status Category

Notice Response Due Clear

Service Type Commercial

Facility Type

Compliance Date

Next Inspection

Next Survey Date

Freq. 0 Meter & GPS Info

Survey Comments

Deficiencies Recommendations Corrections

Facility Inspect -UD 01

Facility Inspect -UD 02

Facility Inspect -UD 03

Facility Inspect -UD 04

Date Font Size 12 Signature Send Notice Survey Check List Project/Plan Check List Import Fields

Location Map Default Survey Items Meter/GPS Info Document Inserts XC2 Picts Print Cancel Survey I...

Notes:

Survey Setup

These types of survey entry and detail can be configure in the Administrator Preferences (Super Admin access required) under Survey Prefs

Administrator Preferences

Table Names/Dflts | Custom Fields | List Column Setup | Update from CIS Setup | BFP Test Import | Universal Defaults

Business Info | Default Activity Codes | Data Entry Prefs | Activity Entry | System IDs | Test Criteria

Data Entry Requirements | Notification Prefs | Field Usage | BFP Assembly Defaults | **Survey Prefs** | Email Settings | UD Assign | Status Terminology | Tester Defaults

Survey Form Type

- Simple - Hazard Types & Comments Only (Old)
- Detailed Item Entry #1
- Detailed Item Entry #2
- Survey Entry - Type #3 - Comments/CheckList
- Survey Entry - Type #4 - Full - All Items

Items Detail Entry:

- Survey Item Entry #1 (Most Detail)
- Survey Item Entry #2
- Survey Item Entry #3
- Survey Item Entry #4 (Least Detail)
 - Survey Item Entry #5 - Basic 01
 - Survey Item Entry #6 - Basic 02
- Add/Modify Item Using List Form
- Add/Modify Item Using Detail Form

Extra Lines on Survey Print Form:

Inspection

High Hazard Month
 Low Hazard Month

Use Facility Areas Print Site Map on Survey Form

Print Backflow List on Survey Form

Survey Status:
 Final/Complete Inspection Type:

Next Survey Date Calculator: Frequency from Initial Survey Date
 Frequency from Compliance Date

Protection Type "Containment":
 Protection Type "Isolation":

Default Letter Text Areas | Survey Printing | Survey Bundled Report

AF FORM Preferences

AF 848 - Form Type:
 AF 848 - Location:
 AF 848 - System Protection:

Survey Column Config | Inspection Type List | Check List | Survey/Inspection Types | **PREFS_03_BFP.05** | Cancel | Done

Notes:



XC2 Software Knowledge Base



Survey Screen KB Asset ID: 3621

This page is an overview of XC2's Most Detailed Survey Screen. This is also the most popular

Survey Information

The opening screen features Basic Information regarding the survey

- 1) Initial Survey Date
- 2) Compliance Date
- 3) General Comments
- 4) Survey Status.

Typically this is required information when creating a survey record and hence why it is on the opening page.

Also notice 4 tabbed area's

- 1) Comments
- 2) Deficiencies
- 3) Requirements
- 4) Corrections

These are individual spaces that will print on your completed survey form.

Notes:

Details/Inspection/Notices

The Detail/Inspections/Notices Tab provides a space to enter and review

- 1) Detailed Survey Violations
- 2) Inspections
- 3) All Survey Notices

you can view or edit the items by double clicking on the record to open

Notes:

Survey Check List

This area is a customizable check list that can be used when conducting a survey.

Each Item could be set as a violation or in compliance if yes is checked.

XC2 Software - BFP : Facility History : Survey : JOHNS GRILL : 63 ELLIS : 1 of 1 Selected : WEB SERVER ON : 80 : WEB BFP Test

Survey Entry Facility Name **JOHNS GRILL** Entry **02/07/17**
 ID # **00-1016075** Service Address **63 ELLIS** By **DESIGNER**

Survey Information Detail/Inspections/Notices **Survey Check List** Hazard List Site Map User Defined BFP Assembly List Project - Plan Check

Survey Check List

Item	Yes	No	N/A	Qty	Note
Internal Protection	✓			1	
Meter Protection	✓			1	
Systems Labeled	✓			1	
BFP Assemblies Required	✓			1	
Written Violation	✓			1	
Back Pressure	✓			1	
Back Siphonage	✓			1	

Survey-Full-04 Project/Plan Check List Go To Survey Info

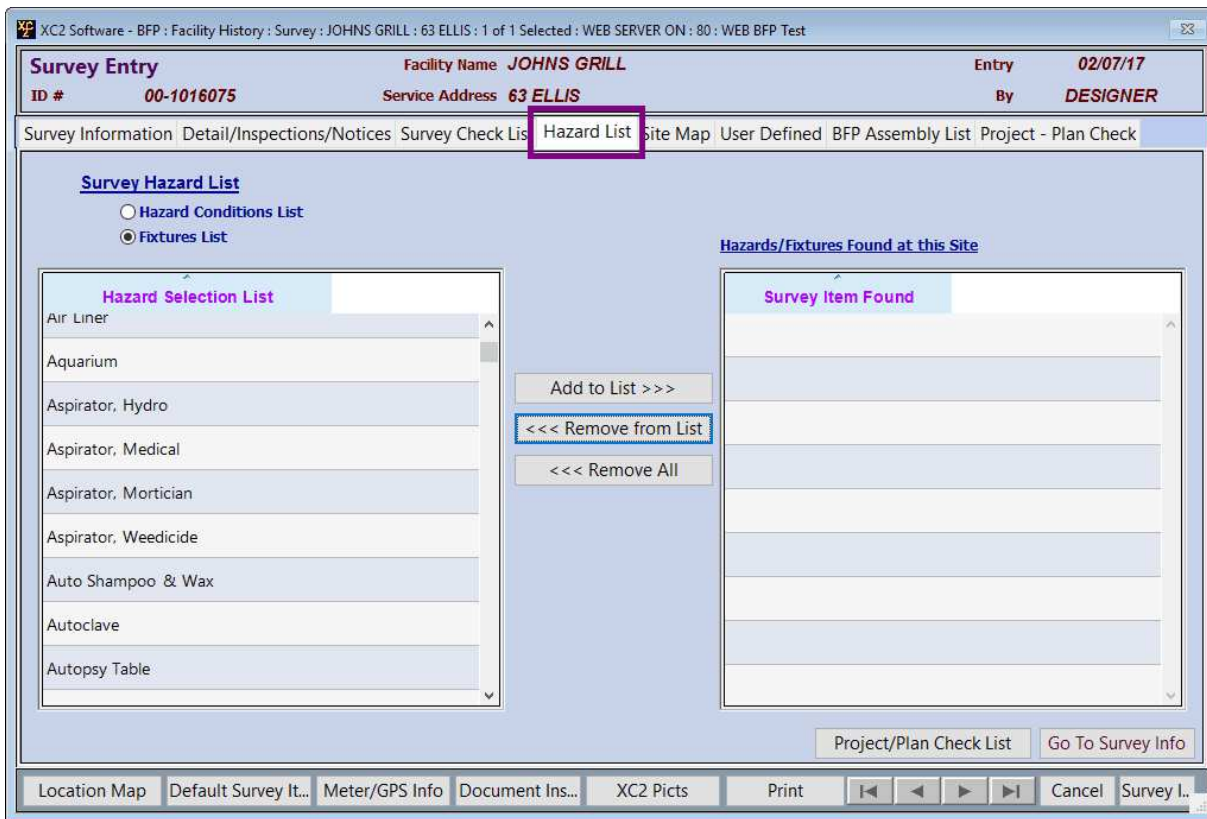
Location Map Default Survey It... Meter/GPS Info Document Ins... XC2 Picts Print < << >> > Cancel Survey I..

Notes:

Hazards List

If you would like to create your own hazards list

you can use the Hazards list tab to create a individual list of Hazards that can be printed out at a later time.



Notes:

Site Map

You may also include a Site Map

The screenshot shows the XC2 Software interface. At the top, the title bar reads "XC2 Software - BFP : Facility History : Survey : JOHNS GRILL : 63 ELLIS : 1 of 1 Selected : WEB SERVER ON : 80 : WEB BFP Test". Below this is a header section for "Survey Entry" with the following details:

Facility Name	JOHNS GRILL	Entry	02/07/17
ID #	00-1016075	Service Address	63 ELLIS
		By	DESIGNER

Below the header is a navigation menu with options: "Survey Information", "Detail/Inspections/Notices", "Survey Check List", "Hazard List", "Site Map", "User Defined", "BFP Assembly List", and "Project - Plan Check". The "Site Map" option is selected.

The main area displays a map of San Francisco. To the right of the map is a control panel with the following elements:

- Picture Size: 679766
- Help button: ? - Help - Site Maps and ...
- Scale: 100%
- New Size: 780.00 x 742.00
- Original Size: 780.00 x 742.00
- Paste from Clipboard button
- Load from Document button

At the bottom of the map area are two buttons: "Project/Plan Check List" and "Go To Survey Info".

The bottom status bar contains the following items from left to right: "Location Map", "Default Survey It...", "Meter/GPS Info", "Document Ins...", "XC2 Picts", "Print", navigation arrows, "Cancel", and "Survey I..".

Notes:

User Defined

User Defined Fields are placed in this tab.

They are here for your convenience

XC2 Software - BFP : Facility History : Survey : JOHNS GRILL : 63 ELLIS : 1 of 1 Selected : WEB SERVER ON : 80 : WEB BFP Test

Survey Entry Facility Name **JOHNS GRILL** Entry **02/07/17**
ID # **00-1016075** Service Address **63 ELLIS** By **DESIGNER**

Survey Information Detail/Inspections/Notices Survey Check List Hazard List Site Map **User Defined** BFP Assembly List Project - Plan Check

Survey Entry - User Defined Data Entry

UD Alpha 40 1
UD Alpha 40 2
UD Alpha 40 3
UD Alpha 40 4
UD Alpha 40 5

UD Alpha 80 1
UD Alpha 80 2
UD Alpha 80 3
UD Alpha 80 4
UD Alpha 80 5

UD Date 01 Notice Date 1
UD Date 02 Notice Date 2
UD Date 03 Notice Date 3
UD Date 04 Notice Date 4
Notice Date 5
Notice Date 6

Hazards Found List

Import Fields Go To Survey Info

Location Map Default Survey It... Meter/GPS Info Document Ins... XC2 Picts Print < << >> > Cancel Survey I...

Notes:

Assembly List

This is a list of all assemblies that are installed at that location

You may create or modify current assembly records

XC2 Software - BFP : Facility History : Survey : JOHNS GRILL : 63 ELLIS : 1 of 1 Selected : WEB SERVER ON : 80 : WEB BFP Test

Survey Entry Facility Name **JOHNS GRILL** Entry **02/07/17**
 ID # **00-1016075** Service Address **63 ELLIS** By **DESIGNER**

Survey Information Detail/Inspections/Notices Survey Check List Hazard List Site Map User Defined **BFP Assembly List** Project - Plan Check

Backflow Assembly List

Equip Location	Type	Mfr	Model	Size	Serial Num	Equipment Fixture Type	Location F
THESE ARE SAMPLE COMMEN	DCDA	Watts	767NDCDABF-	10"	555	Aquarium	

Add BFP Assembly Modify BFP Assembly Go To Survey Info

Location Map Default Survey It... Meter/GPS Info Document Ins... XC2 Picts Print < << >> > Cancel Survey I...

Notes:

Your Project Checklist

Lastly, this is your projects checklist

XC2 Software - BFP : Facility History : Survey : JOHNS GRILL : 63 ELLIS : 1 of 1 Selected : WEB SERVER ON : 80 : WEB BFP Test

PROJECT CHECK LIST

Project Check List			Plan Check Items		
#	Item	Expected	Done	Done By	Notes
1.00	In Design - Engineering				
2.00	In Design - Plan Check				
3.00	Construction				
4.00	On-Line Not Yet Billed				
5.00	On-Line Billing Complete				

Project Status
 Plan Check Status

Project Value
 Application #

Tax Lot ID

Notes:



XC2 Software Knowledge Base



Survey Entry From Facility

KB Asset ID: 3622

This page describes tips on how to enter a survey in XC2

Creating a New Survey Record

You can create a new survey record from within a facility record

first search for the facility then open the record

The screenshot shows the XC2 software interface. At the top, there's a title bar: "XC2 Software - BFP : City of Snoqualamish, WA: * Facility: 1 of 92 Records : Multi-Line : WEB SERVER ON : 80 : WEB BFP Test". Below the title bar is a menu bar with options: "User Options", "Add", "Delete", "Find", "Sort", "Show All", "Export", "Saved Search", and "Report".

Below the menu bar is a toolbar with icons for "Add", "Delete", "Find", "Sort", "Show All", "Export", "Saved Search", and "Report".

The main area is a table with the following columns: "#", "Facility Name", "Addr (#)", "Street", "Site Qty", "Sched Code", "Next Survey Date", and "Last Survey Date". The first row contains: "1", "JOHNS GRILL", "63", "ELLIS", "1", "", "02/07/20", and "02/0".

On the left side, there is a sidebar with "List Views" and "Favorite Tasks". The "Favorite Tasks" list includes: "Facility List", "BFP Assembly List", "BFP Testers List", "Tester Company List", "Test Kits List", "Test History", and "Facility Survey History List". The "Facility List" item is highlighted with a red box.

At the bottom, there are buttons for "Send Notice", "Enter Survey", "Enter Test", and "Exit XC2".

Notes:

Enter Survey

Click Survey/Inspections

Click Enter Survey

The screenshot shows the XC2 Software interface for facility management. The top section contains 'Facility Information' and 'Custom Fields'. The 'Facility Address Info' section shows details for 'JOHNS GRILL' at '63 ELLIS' in 'SAN FRANCISCO, CA'. The 'Custom Fields' section includes 'XC2 Facility ID: 00-0100422', 'Customer Code: RVWF-8928', 'Tester Code: ENNG-6877', and 'Last Survey Date: 02/07/2017'. Below this is a section for 'Service Type', 'Assigned Inspector', and 'Auth. Tester Company'. A navigation bar at the bottom of the main area includes tabs for 'BFP Assembly List', 'BFP Assembly History', 'Letter History', 'Surveys/Inspections' (highlighted with a purple box), and 'All Devices'. Below the navigation bar is a table with the following data:

#	Activity Date	Code	Survey By	Survey Status	Violations Qty	Viol. Qty Remain	Last Inspection	Next Inspection	Cost to Install
1	02/07/17	SURVEY	MIKE KIDD	Initiated			02/07/17		.00

At the bottom of the interface, there is a toolbar with buttons for 'Quick Test Entry', 'Enter Survey' (highlighted with a purple box), 'New CSI Inspecti...', 'Send Notice', 'Delete Item', 'View Survey', and 'Expand List'. The status bar at the very bottom shows 'Pictures/Site M...', 'Google Maps', 'Qty BFP 1', 'Add Facility', 'Search', 'Report/Print', 'Cancel', and 'Save'.

Notes:

Enter Basic Survey Information

I like to start with the required basic information first

- 1) Initial Survey Date
- 2) Surveyers Name
- 3) Current Status

From there I will move down into the comments areas of the survey.

You may or may not use all features that are available in the Survey entry area.

You may keep it simple or basic. The idea is to create a record that can be potentially tracked so that you can easily identify facilities are in violation.

Notes:

Search For Facility

Search for the facility

Click Enter Survey

Lookup Facility

Survey Entry

Lookup

Lookup by Any of the Following Criteria:

Facility Name

Service Addr. Street

Acct Number

Location ID

Meter #

Cancel Enter Survey

Notes:

Select Facility

Facility List

Select a Facility LIST.01

#	Facility Name	Addr (#)	Street	Site Qty	Sched C
1	JOHNS GRILL	63	ELLIS	1	

Add New Cancel Select

Notes:

Enter Survey

XC2 Software - BFP : New Survey Record: JOHNS GRILL : 63 ELLIS : WEB SERVER ON : 80 : WEB BFP Test

Survey Entry		Facility Name JOHNS GRILL	Entry 02/08/17
ID # 00-1016078	Service Address 63 ELLIS	By DESIGNER	

Survey Information | Detail/Inspections/Notices | Survey Check List | Hazard List | Site Map | User Defined | BFP Assembly List | Project - Plan Check

Initial Date	02/08/2017	Time		Service Type	Residential
Inspection By		Facility Type		Compliance Date	
Event Code	SURVEY	Next Inspection		Next Survey Date	02/07/2020
Survey Status	In Process	Next Survey Date	02/07/2020	Freq.	36
Status Category				Meter & GPS Info	
Notice Response Due		Clear			

Survey Comments 01 | Deficiencies | Requirements | Corrections

Survey Comments 01

Date [icon] [icon] Font Size 15

UD Alpha 40 1		UD Alpha 40 3	
UD Alpha 40 2		UD Alpha 40 4	

Load from Scanner | Load from Disk | Signature | Send Notice | Survey Check List | Project/Plan Check List

Location Map | Default Survey It... | Meter/GPS Info | Document Ins... | XC2 Picts | Print | [Navigation] | Cancel | Survey I..

Notes:



Creating Detailed Inspection Items

KB Asset ID: 3633

You can create detailed inspections items that have their own comments and deficiency areas. The link below shows how to enter detailed inspection items.

Detailed Inspection Item

Here is an example of a detailed inspection Item.

They are particularly useful when inspecting in-premise cross connections.

XC2 Software - BFP : Facility History : Survey : JOHNS GRILL : 63 ELLIS : 1 of 1 Selected : WEB SERVER ON : 80 : WEB BFP Test

Inspection/Survey Item Entry 01-0003003 SURVEYITEM.LG.1

Survey Item Information Survey Item Comments - Expanded

Facility Name JOHNS GRILL **63 ELLIS**
*** Item Date** 02/07/2017 **Inspector Name** MIKE KIDD **Status** Initiated
*** Equip/Fixture Info/Type** Aquarium
*** Location /Item #/Code** 01 **Fixture Qty** 1 **Violation** **Correction Date**

Expand Comments Areas
*** Item Location** 7TH FLOOR LOBBY
Deficiency Deficiency
 ASSEMBLY TOO HIGH
Requirements Recommendation
 LOWER THE ASSEMBLY 10FT
Comments
 Floor can get very slippery. Be Careful

User Defined Alpha 80 01 **User Defined Alpha 80 02**
Contaminant/Haz. **Hazard Level**
Existing Pipe Size

Backflow Assembly Requirements
Required Type **Required Size**
Cost to Install \$0.00
User Defined Date 01 **User Defined Date 02**

Back Siphonage Potential Hazard Impropr Application
 Back Pressure Existing Hazard Impropr Install

Testable Device
 Existing/New BFP Assembly

Type RP **Size** 3/4" **Mfr** Watts **Model** 009 **Serial Num** 555
Assembly ID 2004726 By Pass
Status Installed **Next Test Due**
Frequency 0 Months

Notes:

Survey Entry

You can add detailed survey items from within the survey record

The area to add detailed items can be found in its own tab

Click the Detail/Inspection/Notices Tab

Survey Entry Facility Name **JOHNS GRILL** Entry **02/07/17**
 ID # **00-1016075** Service Address **63 ELLIS** By **DESIGNER**

Survey Information **Detail/Inspections/Notices** Survey Check List Hazard List Site Map User Defined BFP Assembly List Project - Plan Check

Initial Date: 02/07/2017 Time: 10:00 AM
 Inspection By: MIKE KIDD Service Type: Residential
 Event Code: SURVEY Facility Type:
 Survey Status: Initiated Compliance Date:
 Status Category: (1) - Correction Schedule Next Inspection:
 Notice Response Due:
 Next Survey Date: 02/07/2020 Violations Qty: 1
 Viol. Qty Remain: 1
 Freq.: 36

Loc Code	Fixture Type	Location	Violation	Deficiency	Require	BFI
01	Aquarium	7TH FLOOR LOBBY	✓	ASSEMBLY TOO HIGH	LOWER THE AS	

Add/Modify Item Using List Form Add/Modify Item Using Detail Form

Add Survey Item View Survey Item Delete Survey Item Go To Survey Info

Location Map Default Survey It... Meter/GPS Info Document Ins... XC2 Picts Print Cancel Survey I..

Notes:

Survey Item

The default Tab will show you all detailed Items that have been added
to Create a new Item Click Add Survey Item

Survey Entry
 ID # 00-1016075 Facility Name JOHNS GRILL Service Address 63 ELLIS Entry 02/07/17 By DESIGNER

Survey Information Detail/Inspections/Notices Survey Check List Hazard List Site Map User Defined BFP Assembly List Project - Plan Check

Initial Date 02/07/2017 Time 10:00 AM
 Inspection By MIKE KIDD Service Type Residential
 Event Code SURVEY Facility Type
 Survey Status Initiated Compliance Date
 Status Category (1) - Correction Schedule Next Inspection
 Notice Response Due Clear Next Survey Date 02/07/2020 Violations Qty 1
 Viol. Qty Remain 1

Loc Code	Fixture Type	Location	Violation	Deficiency	Require	BFI
01	Aquarium	7TH FLOOR LOBBY	✓	ASSEMBLY TOO HIGH	LOWER THE AS	

Add/Modify Item Using List Form
 Add/Modify Item Using Detail Form

Notes:

Blank Survey Item Screen

A blank survey item screen will appear

XC2 Software - BFP : Facility History : Survey : JOHNS GRILL : 63 ELLIS : 1 of 1 Selected : WEB SERVER ON : 80 : WEB BFP Test

Inspection/Survey Item Entry 01-0003007 **SURVEYITEM.LG.1**

Survey Item Information Survey Item Comments - Expanded

Facility Name: JOHNS GRILL * Item Date: 02/07/2017 * Equip/Fixture Info/Type: * Location /Item #/Code: 02	63 ELLIS Inspector Name: MIKE KIDD Status: Initiated Fixture Qty: 1 <input type="checkbox"/> Violation Correction Date: <input type="text"/>
---	--

Expand Comments Areas * Item Location: <input type="text"/> Deficiency: Deficiency Requirements: Recommendation Comments: <input type="text"/>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;"> ser Defined Alpha 80 01: <input type="text"/> ser Defined Alpha 80 02: <input type="text"/> Contaminant/Haz.: <input type="text"/> Hazard Level: <input type="text"/> Existing Pipe Size: <input type="text"/> </td> <td style="width: 50%;"> Backflow Assembly Requirements Required Type: <input type="text"/> Required Size: <input type="text"/> Cost to Install: \$0.00 User Defined Date 01: <input type="text"/> User Defined Date 02: <input type="text"/> </td> </tr> <tr> <td colspan="2"> <input type="checkbox"/> Back Siphonage <input type="checkbox"/> Potential Hazard <input type="checkbox"/> Impropr Application <input type="checkbox"/> Back Pressure <input type="checkbox"/> Existing Hazard <input type="checkbox"/> Impropr Install </td> </tr> <tr> <td colspan="2"> <input type="checkbox"/> Testable Device <input type="checkbox"/> Existing/New BFP Assembly </td> </tr> <tr> <td colspan="2"> Type: <input type="text"/> Size: <input type="text"/> Mfr: <input type="text"/> Model: <input type="text"/> Serial Num: <input type="text"/> </td> </tr> <tr> <td colspan="2"> Assembly ID: <input type="text"/> <input type="checkbox"/> By Pass Status: <input type="text"/> Next Test Due: <input type="text"/> Frequency: 0 Months <input type="button" value="Modify BFP Info"/> </td> </tr> </table>	ser Defined Alpha 80 01: <input type="text"/> ser Defined Alpha 80 02: <input type="text"/> Contaminant/Haz.: <input type="text"/> Hazard Level: <input type="text"/> Existing Pipe Size: <input type="text"/>	Backflow Assembly Requirements Required Type: <input type="text"/> Required Size: <input type="text"/> Cost to Install: \$0.00 User Defined Date 01: <input type="text"/> User Defined Date 02: <input type="text"/>	<input type="checkbox"/> Back Siphonage <input type="checkbox"/> Potential Hazard <input type="checkbox"/> Impropr Application <input type="checkbox"/> Back Pressure <input type="checkbox"/> Existing Hazard <input type="checkbox"/> Impropr Install		<input type="checkbox"/> Testable Device <input type="checkbox"/> Existing/New BFP Assembly		Type: <input type="text"/> Size: <input type="text"/> Mfr: <input type="text"/> Model: <input type="text"/> Serial Num: <input type="text"/>		Assembly ID: <input type="text"/> <input type="checkbox"/> By Pass Status: <input type="text"/> Next Test Due: <input type="text"/> Frequency: 0 Months <input type="button" value="Modify BFP Info"/>	
ser Defined Alpha 80 01: <input type="text"/> ser Defined Alpha 80 02: <input type="text"/> Contaminant/Haz.: <input type="text"/> Hazard Level: <input type="text"/> Existing Pipe Size: <input type="text"/>	Backflow Assembly Requirements Required Type: <input type="text"/> Required Size: <input type="text"/> Cost to Install: \$0.00 User Defined Date 01: <input type="text"/> User Defined Date 02: <input type="text"/>										
<input type="checkbox"/> Back Siphonage <input type="checkbox"/> Potential Hazard <input type="checkbox"/> Impropr Application <input type="checkbox"/> Back Pressure <input type="checkbox"/> Existing Hazard <input type="checkbox"/> Impropr Install											
<input type="checkbox"/> Testable Device <input type="checkbox"/> Existing/New BFP Assembly											
Type: <input type="text"/> Size: <input type="text"/> Mfr: <input type="text"/> Model: <input type="text"/> Serial Num: <input type="text"/>											
Assembly ID: <input type="text"/> <input type="checkbox"/> By Pass Status: <input type="text"/> Next Test Due: <input type="text"/> Frequency: 0 Months <input type="button" value="Modify BFP Info"/>											

Notes:

Choose the Fixture Type

Choose the fixture type that is being inspected

you can click the pulldown menu to choose the type - you can also type the fixture type in this area

Notes:

Location / Comments / Deficiency / Requirements

Here you can enter the individual Items

- location
- Deficiency
- Requirements
- Comments

XC2 Software - BFP : Facility History : Survey : JOHNS GRILL : 63 ELLIS : 1 of 1 Selected : WEB SERVER ON : 80 : WEB BFP Test

Inspection/Survey Item Entry 01-0003007 SURVEYITEM.LG.1

Survey Item Information Survey Item Comments - Expanded

Facility Name JOHNS GRILL **63 ELLIS**
*** Item Date** 02/07/2017 **Inspector Name** MIKE KIDD **Status** Initiated
*** Equip/Fixture Info/Type** Bird Bath
*** Location /Item #/Code** 02 **Fixture Qty** 1 **Violation** **Correction Date**

Expand Comments Areas

*** Item Location** LOCATED IN THE SOUTH GARDEN NEXT TO ROSES

Deficiency LEAKING RELEF VALVE

Requirements REPAIR

Comments Needs Tag

User Defined Alpha 80 01

User Defined Alpha 80 02

Contaminant/Haz.

Hazard Level Low

Existing Pipe Size 3/4"

Back Siphonage Potential Hazard Impropr Application

Back Pressure Existing Hazard Impropr Install

Testable Device

Existing/New BFP Assembly

Type

Size 3/4"

Mfr

Model

Serial Num

Backflow Assembly Requirements

Required Type

Required Size

Cost to Install \$0.00

User Defined Date 01

User Defined Date 02

Assembly ID

By Pass

Status

Next Test Due

Frequency 0 Months

Notes:

Device Information

If there is a backflow assembly at the location

you can choose the type here

Click the checkbox to choose the existing device information

XC2 Software - BFP : Facility History : Survey : JOHNS GRILL : 63 ELLIS : 1 of 1 Selected : WEB SERVER ON : 80 : WEB BFP Test

Inspection/Survey Item Entry 01-0003007 SURVEYITEM.LG.1

Survey Item Information Survey Item Comments - Expanded

Facility Name JOHNS GRILL 63 ELLIS
*** Item Date** 02/07/2017 **Inspector Name** MIKE KIDD **Status** Initiated
*** Equip/Fixture Info/Type** Bird Bath
*** Location /Item #/Code** 02 **Fixture Qty** 1 **Violation** **Correction Date**

Expand Comments Areas
*** Item Location**
 LOCATED IN THE SOUTH GARDEN NEXT TO ROSES
Deficiency Deficiency
 LEAKING RELIEF VALVE
Requirements Recommendation
 REPAIR
Comments
 Needs Tag

User Defined Alpha 80 01
User Defined Alpha 80 02
Contaminant/Haz.
Hazard Level Low
Existing Pipe Size 3/4"

Backflow Assembly Requirements
Required Type
Required Size
Cost to Install \$0.00
User Defined Date 01
User Defined Date 02

Back Siphonage Potential Hazard Impropr Application
 Back Pressure Existing Hazard Impropr Install

Testable Device
 Existing/New BFP Assembly:
Type RP
Size 3/4"
Mfr Wilkins
Model 975XL2MS
Serial Num 78

Assembly ID 2004758
 By Pass
Status
Next Test Due
Frequency 0 Months

Notes:

Closing the Item

If the repairs or the requirements have been met, enter a correction date to close the issue.

XC2 Software - BFP : Facility History : Survey : JOHNS GRILL : 63 ELLIS : 1 of 1 Selected : WEB SERVER ON : 80 : WEB BFP Test

Inspection/Survey Item Entry 01-0003007 **SURVEYITEM.LG.1**

Survey Item Information Survey Item Comments - Expanded

Facility Name JOHNS GRILL * Item Date 02/07/2017 * Equip/Fixture Info/Type Bird Bath * Location /Item #/Code 02	63 ELLIS Inspector Name MIKE KIDD Status Initiated Fixture Qty 1 <input checked="" type="checkbox"/> Violation Correction Date 02/16/2017
--	---

Expand Comments Areas * Item Location [Dropdown] LOCATED IN THE SOUTH GARDEN NEXT TO ROSES Deficiency Deficiency LEAKING RELIEF VALVE Requirements Recommendation REPAIR Comments Needs Tag	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;"> ser Defined Alpha 80 01 [Dropdown] ser Defined Alpha 80 02 [Dropdown] Contaminant/Haz. [Dropdown] Hazard Level Low Existing Pipe Size 3/4" </td> <td style="width: 50%; vertical-align: top;"> Backflow Assembly Requirements Required Type [Dropdown] Required Size [Dropdown] Cost to Install \$0.00 User Defined Date 01 [Dropdown] User Defined Date 02 [Dropdown] </td> </tr> <tr> <td colspan="2"> <input type="checkbox"/> Back Siphonage <input type="checkbox"/> Potential Hazard <input type="checkbox"/> Impropr Application <input type="checkbox"/> Back Pressure <input type="checkbox"/> Existing Hazard <input type="checkbox"/> Impropr Install </td> </tr> <tr> <td colspan="2"> <input checked="" type="checkbox"/> Testable Device <input checked="" type="checkbox"/> Existing/New BFP Assembly Type RP Size 3/4" Mfr Wilkins Model 975XL2MS Serial Num 78 </td> </tr> <tr> <td colspan="2"> Assembly ID 2004758 <input type="checkbox"/> By Pass Status [Dropdown] Next Test Due [Dropdown] Frequency 0 Months <input type="button" value="Modify BFP Info"/> </td> </tr> </table>	ser Defined Alpha 80 01 [Dropdown] ser Defined Alpha 80 02 [Dropdown] Contaminant/Haz. [Dropdown] Hazard Level Low Existing Pipe Size 3/4"	Backflow Assembly Requirements Required Type [Dropdown] Required Size [Dropdown] Cost to Install \$0.00 User Defined Date 01 [Dropdown] User Defined Date 02 [Dropdown]	<input type="checkbox"/> Back Siphonage <input type="checkbox"/> Potential Hazard <input type="checkbox"/> Impropr Application <input type="checkbox"/> Back Pressure <input type="checkbox"/> Existing Hazard <input type="checkbox"/> Impropr Install		<input checked="" type="checkbox"/> Testable Device <input checked="" type="checkbox"/> Existing/New BFP Assembly Type RP Size 3/4" Mfr Wilkins Model 975XL2MS Serial Num 78		Assembly ID 2004758 <input type="checkbox"/> By Pass Status [Dropdown] Next Test Due [Dropdown] Frequency 0 Months <input type="button" value="Modify BFP Info"/>	
ser Defined Alpha 80 01 [Dropdown] ser Defined Alpha 80 02 [Dropdown] Contaminant/Haz. [Dropdown] Hazard Level Low Existing Pipe Size 3/4"	Backflow Assembly Requirements Required Type [Dropdown] Required Size [Dropdown] Cost to Install \$0.00 User Defined Date 01 [Dropdown] User Defined Date 02 [Dropdown]								
<input type="checkbox"/> Back Siphonage <input type="checkbox"/> Potential Hazard <input type="checkbox"/> Impropr Application <input type="checkbox"/> Back Pressure <input type="checkbox"/> Existing Hazard <input type="checkbox"/> Impropr Install									
<input checked="" type="checkbox"/> Testable Device <input checked="" type="checkbox"/> Existing/New BFP Assembly Type RP Size 3/4" Mfr Wilkins Model 975XL2MS Serial Num 78									
Assembly ID 2004758 <input type="checkbox"/> By Pass Status [Dropdown] Next Test Due [Dropdown] Frequency 0 Months <input type="button" value="Modify BFP Info"/>									

Notes:

Adding a Picture

You can also add a picture of the Item

XC2 Software - BFP : Facility History : Survey : JOHNS GRILL : 63 ELLIS : 1 of 1 Selected : WEB SERVER ON : 80 : WEB BFP Test

Inspection/Survey Item Entry 01-0003007 **SURVEYITEM.LG.1**

Survey Item Information Survey Item Comments - Expanded

Facility Name: JOHNS GRILL * Item Date: 02/07/2017 * Equip/Fixture Info/Type: Bird Bath * Location /Item #/Code: 02	63 ELLIS Inspector Name: MIKE KIDD Status: Initiated Fixture Qty: 1 <input checked="" type="checkbox"/> Violation Correction Date: 02/16/2017
--	---

Expand Comments Areas * Item Location: [Dropdown] LOCATED IN THE SOUTH GARDEN NEXT TO ROSES Deficiency: Deficiency LEEKING RELEF VALVE Requirements: Recommendation REPAIR Comments: [Dropdown] Needs Tag	ser Defined Alpha 80 01: [Dropdown] ser Defined Alpha 80 02: [Dropdown] Contaminant/Haz.: [Dropdown] Hazard Level: Low Existing Pipe Size: 3/4" <input type="checkbox"/> Back Siphonage <input type="checkbox"/> Potential Hazard <input type="checkbox"/> Impropr Application <input type="checkbox"/> Back Pressure <input type="checkbox"/> Existing Hazard <input type="checkbox"/> Impropr Install <input checked="" type="checkbox"/> Testable Device <input checked="" type="checkbox"/> Existing/New BFP Assembly Type: RP Size: 3/4" Mfr: Wilkins Model: 975XL2MS Serial Num: 78	Backflow Assembly Requirements Required Type: [Dropdown] Required Size: [Dropdown] Cost to Install: \$0.00 User Defined Date 01: [Dropdown] User Defined Date 02: [Dropdown] Assembly ID: 2004758 <input type="checkbox"/> By Pass Status: [Dropdown] Next Test Due: [Dropdown] Frequency: 0 Months Modify BFP Info
---	--	--

XC2 Picts New [Navigation Icons] Cancel Save

Notes:

Review

Save your Detailed Item when you are finished

XC2 Software - BFP : Facility History : Survey : JOHNS GRILL : 63 ELLIS : 1 of 1 Selected : WEB SERVER ON : 80 : WEB BFP Test

Inspection/Survey Item Entry 01-0003007 **SURVEYITEM.LG.1**

Survey Item Information Survey Item Comments - Expanded

Facility Name JOHNS GRILL 63 ELLIS
*** Item Date** 02/07/2017 **Inspector Name** MIKE KIDD **Status** Initiated
*** Equip/Fixture Info/Type** Bird Bath
*** Location /Item #/Code** 02 **Fixture Qty** 1 **Violation** **Correction Date** 02/16/2017

Expand Comments Areas
*** Item Location** [Dropdown] LOCATED IN THE SOUTH GARDEN NEXT TO ROSES
Deficiency Deficiency LEAKING RELIF VALVE
Requirements Recommendation REPAIR
Comments Needs Tag

User Defined Alpha 80 01 [Dropdown]
User Defined Alpha 80 02 [Dropdown]
Contaminant/Haz. [Dropdown]
Hazard Level Low
Existing Pipe Size 3/4"

Backflow Assembly Requirements
Required Type [Dropdown]
Required Size [Dropdown]
Cost to Install \$0.00
User Defined Date 01 [Dropdown]
User Defined Date 02 [Dropdown]

Back Siphonage Potential Hazard Impropr Application
 Back Pressure Existing Hazard Impropr Install

Testable Device
 Existing/New BFP Assembly
Type RP
Size 3/4"
Mfr Wilkins
Model 975XL2MS
Serial Num 78

Assembly ID 2004758
 By Pass
Status [Dropdown]
Next Test Due [Dropdown]
Frequency 0 Months
 Modify BFP In...

XC2 Picts New [Navigation Icons] Cancel **Save**

Notes:

Item will be added

XC2 Software - BFP : Facility History : Survey : JOHNS GRILL : 63 ELLIS : 1 of 1 Selected : WEB SERVER ON : 80 : WEB BFP Test

Survey Entry Facility Name **JOHNS GRILL** Entry **02/07/17**
 ID # **00-1016075** Service Address **63 ELLIS** By **DESIGNER**

Survey Information Detail/Inspections/Notices Survey Check List Hazard List Site Map User Defined BFP Assembly List Project - Plan Check

Initial Date 02/07/2017 Time 10:00 AM
 Inspection By MIKE KIDD Service Type Residential
 Event Code SURVEY Facility Type
 Survey Status Initiated Compliance Date Violations Qty 2
 Status Category (1) - Correction Schedules Next Inspection Viol. Qty Remain 1
 Notice Response Due Clear Next Survey Date 02/07/2020 Freq. 36

Loc Code	Fixture Type	Location	Violation	Deficiency	Require	BFI
01	Aquarium	7TH FLOOR LOBBY	✓	ASSEMBLY TOO HIGH	LOWER THE AS	
02	Bird Bath	LOCATED IN THE SC	✓	LEAKING RELEF VALV	REPAIR	

Add/Modify Item Using List Form Add/Modify Item Using Detail Form

Add Survey Item View Survey Item Delete Survey Item Go To Survey Info

Location Map Default Survey It... Meter/GPS Info Document Ins... XC2 Picts Print Cancel Survey I..

Notes:



How to Complete a Survey

KB Asset ID: 3619

This page describes how to complete individual surveys so that the next survey date will reset to a future date.

Open a Survey Record

Search for the facility where the survey was conducted.

Double click to open

The screenshot shows the XC2 software interface. At the top, there's a title bar: "XC2 Software - BFP : City of Snoqualamish, WA: * Facility: 1 of 92 Records : Multi-Line : WEB SERVER ON : 80 : WEB BFP Test". Below the title bar is a menu bar with options: "User Options", "Add", "Delete", "Find", "Sort", "Show All", "Export", "Saved Search", and "Report".

On the left side, there's a "List Views" panel with a dropdown menu set to "Facility". Below this is a "Favorite Tasks" list with items: "Facility List", "BFP Assembly List", "BFP Testers List", "Tester Company List", "Test Kits List", "Test History", and "Facility Survey History List". The "Facility List" item is highlighted with a purple box and an arrow points to it from the right.

The main area is a table with the following columns: "#", "Facility Name", "Addr (#)", "Street", "Site Qty", "Sched Code", "Next Survey Date", and "Last Survey Date". The first row contains: "1", "JOHNS GRILL", "63", "ELLIS", "1", "", "02/06/20", and "02/06/20". A purple arrow points to the "Find: Facility Name" search box at the top right, which contains the text "Johns".

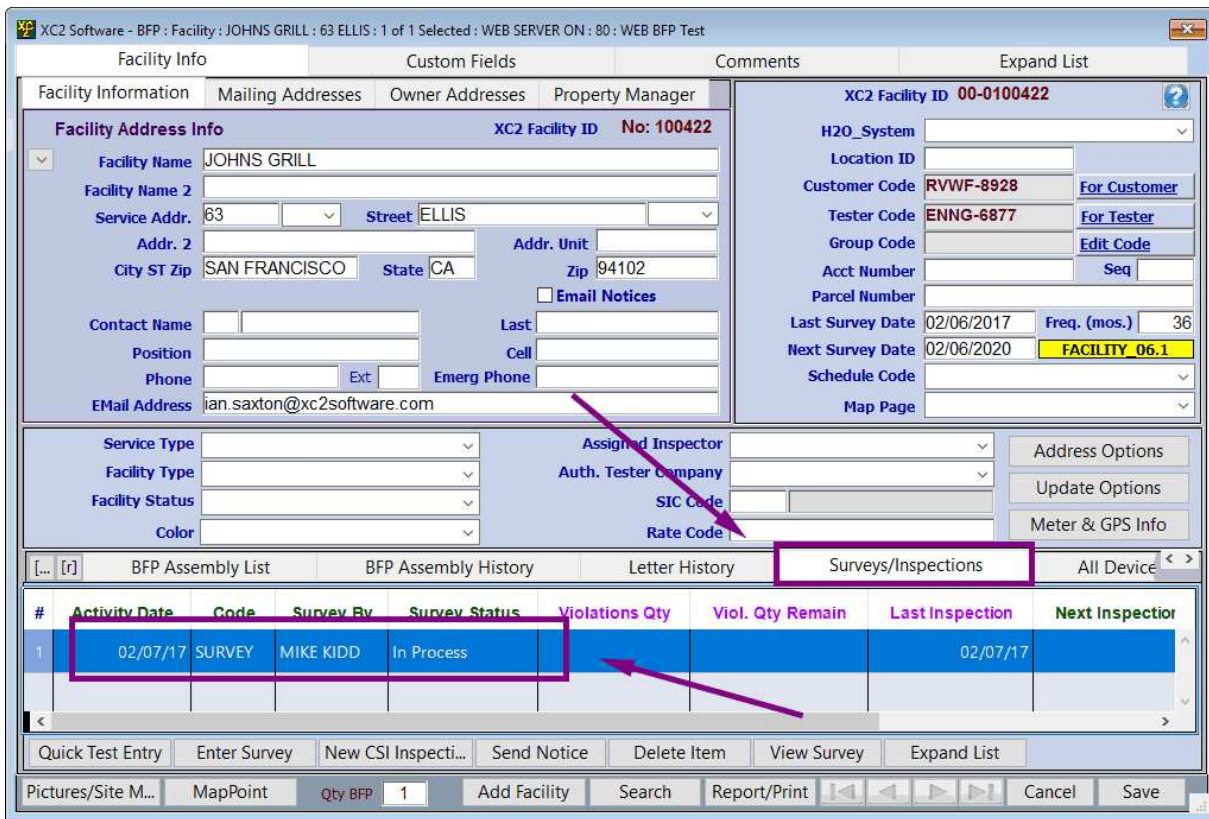
At the bottom of the interface, there are buttons for "Send Notice", "Enter Survey", "Enter Test", and "Exit XC2". There are also checkboxes for "Filter On" and "Filter Facilities w/out Backflow".

Notes:

Survey History

Click on the facility survey history tab

double click on the survey that you would like to close



Notes:

Survey Status

Survey status

If the Survey status is marked complete, XC2 will close the survey by clearing any survey response dates and reset the next survey date.

To change the survey status click the survey status pulldown menu.

XC2 Software - BFP : Facility History : Survey : JOHNS GRILL : 63 ELLIS : 1 of 1 Selected : WEB SERVER ON : 80 : WEB BFP Test

Survey Entry Facility Name **JOHNS GRILL** Entry **02/07/17**
ID # **00-1016075** Service Address **63 ELLIS** By **DESIGNER**

Survey Information Detail/Inspections/Notices Survey Check List Hazard List Site Map User Defined BFP Assembly List Project - Plan Check

Initial Date 02/07/2017 Time 10:00 AM
Inspection By MIKE KIDD Service Type Residential
Event Code SURVEY Facility Type
Survey Status **In Process** Compliance Date
Status Category (1) - Correction Scheduler Next Inspection
Notice Response Due 02/06/2017 Clear Next Survey Date 02/06/2020 Freq. 36 Meter & GPS Info

Survey Comments 01 !!! Deficiencies !!! Requirements Corrections

Survey Comments 01 Boiler Plate Text
DEVICE HAS NO MANUFACTURERER TAG/PLATE. REPLACE TAG/PLATE OR BPD ASSEMBLY WHEN IT FAILS.

Date Font Size 15
UD Alpha 40 1 UD Alpha 40 3
UD Alpha 40 2 UD Alpha 40 4

Load from Scanner Load from Disk Signature Send Notice Survey Check List Project/Plan Check List

Location Map Default Survey It... Meter/GPS Info Document Ins... XC2 Picts Print Cancel Save

Notes:

Select Complete

Survey Entry Facility Name **JOHNS GRILL** Entry **02/07/17**
ID # **00-1016075** Service Address **63 ELLIS** By **DESIGNER**

Survey Information Detail/Inspections/Notices Survey Check List Hazard List Site Map User Defined BFP Assembly List Project - Plan Check

Initial Date: 02/07/2017 Time: 10:00 AM
Inspection By: MIKE KIDD Service Type: Residential
Event Code: SURVEY Facility Type:
Survey Status: **In Process** Compliance Date:
Status Category: Initiated Next Inspection:
Notice Response Due: In Process Next Survey Date: 02/06/2020 Freq.: 36 Meter & GPS Info:
Complete
Cancelled
Shutoff
Rescheduled
Vacant

Survey Comments: **Survey Comments 01** Boiler Plate Text
DEVICE HAS NO MANUFACTURER TAG/PLATE. REPLACE TAG/PLATE OR BPD ASSEMBLY WHEN IT FAILS.

UD Alpha 40 1 UD Alpha 40 3
UD Alpha 40 2 UD Alpha 40 4

Load from Scanner Load from Disk Signature Send Notice Survey Check List Project/Plan Check List

Location Map Default Survey It... Meter/GPS Info Document Ins... XC2 Picts Print Cancel Save

Notes:

Compliance Date

After Closing the Survey Record, the compliance date will be created.

Confirm that the compliance date is correct

Click save when you are finished

Survey Entry
ID # 00-1016075 Facility Name JOHNS GRILL Service Address 63 ELLIS Entry 02/07/17 By DESIGNER

Survey Information Detail/Inspections/Notices Survey Check List Hazard List Site Map User Defined BFP Assembly List Project - Plan Check

Initial Date 02/07/2017 Time 10:00 AM
Inspection By MIKE KIDD Service Type Residential
Event Code SURVEY Facility Type
Survey Status Complete Compliance Date 02/07/2017
Status Category (1) - Correction Scheduler Next Inspection
Notice Response Due 02/06/2017 Clear Next Survey Date 02/12/2017 Freq. 36 Meter & GPS Info

Survey Comments 01 !!! Deficiencies !!! Requirements Corrections

Survey Comments 01 Boiler Plate Text
DEVICE HAS NO MANUFACTURERER TAG/PLATE. REPLACE TAG/PLATE OR BPD ASSEMBLY WHEN IT FAILS.

UD Alpha 40 1 UD Alpha 40 3
UD Alpha 40 2 UD Alpha 40 4

Load from Scanner Load from Disk Signature Send Notice Survey Check List Project/Plan Check List

Location Map Default Survey It... Meter/GPS Info Document Ins... XC2 Picts Print Cancel Save

Notes:

Next Survey date will change

XC2 Software - BFP : Facility History: 1 Records : WEB SERVER ON : 80 : WEB BFP Test

Facility Info Custom Fields Comments Expand List

Facility Information Mailing Addresses Owner Addresses Property Manager

Facility Address Info XC2 Facility ID No: 100422

Facility Name: JOHNS GRILL
 Facility Name 2:
 Service Addr: 63 Street: ELLIS
 Addr. 2:
 City ST Zip: SAN FRANCISCO State: CA Zip: 94102
 Email Notices
 Contact Name:
 Position:
 Phone:
 EMail Address: ian.saxton@xc2software.com

Assigned Inspector:
 Auth. Tester Company:
 SIC Code:
 Rate Code:
 Address Options
 Update Options
 Meter & GPS Info

XC2 Facility ID 00-0100422
 H2O_System:
 Location ID:
 Customer Code: RVWF-8928 For Customer
 Tester Code: ENNG-6877 For Tester
 Group Code: Edit Code
 Acct Number: Seq
 Parcel Number:
 Last Survey Date: 02/07/2017 Freq. (mos.): 36
Next Survey Date: 02/07/2020 FACILITY_06.1
 Schedule Code:
 Map Page:

Service Type: Residential
 Facility Type:
 Facility Status:
 Color:

[...] [r] BFP Assembly List BFP Assembly History Letter History Surveys/Inspections All Device

#	Activity Date	Code	Survey By	Survey Status	Violations Qty	Viol. Qty Remain	Last Inspection	Next Inspector
1	02/07/17	SURVEY	MIKE KIDD	Complete			02/07/17	

Quick Test Entry Enter Survey New CSI Inspecti... Send Notice Delete Item View Survey Expand List

Pictures/Site M... MapPoint Qty BFP 1 Add Facility Search Report/Print Cancel Save

Notes:



XC2 Software Knowledge Base



How Scan Your Image Or Document Into A Survey Record

KB Asset ID: 3631

No need to scan your image first then load into your survey record.
You can scan the image or document directly into the survey record.

In the Facility Survey Record

Load from scanner

XC2 Software - BFP : New Survey Record: Colorado Plaza III : 201 14th ST

Survey Entry Facility Name **Colorado Plaza III** Entry **02/16/17**
 ID # **00-1000016** Service Address **201 14th ST** By **Designer**

Survey Information | Survey Check List | Site Map | User Defined | BFP Assembly List | Notice History | Project - Plan Check

Initial Date: 02/16/2017 Time:
 Inspection By: Larry Williams Service Type: Commercial
 Event Code: SURVEY Facility Type: Carwash
 Survey Status: In Process Compliance Date:
 Status Category: (2) - Referred to Local D Next Inspection:
 Notice Response Due: Next Survey Date: Freq.: 0 Meter & GPS Info

Survey Comments | Deficiencies | Recommendations | Corrections [r]

Survey Comments Boiler Plate Text:

Date Font Size: 12 Expand Comments

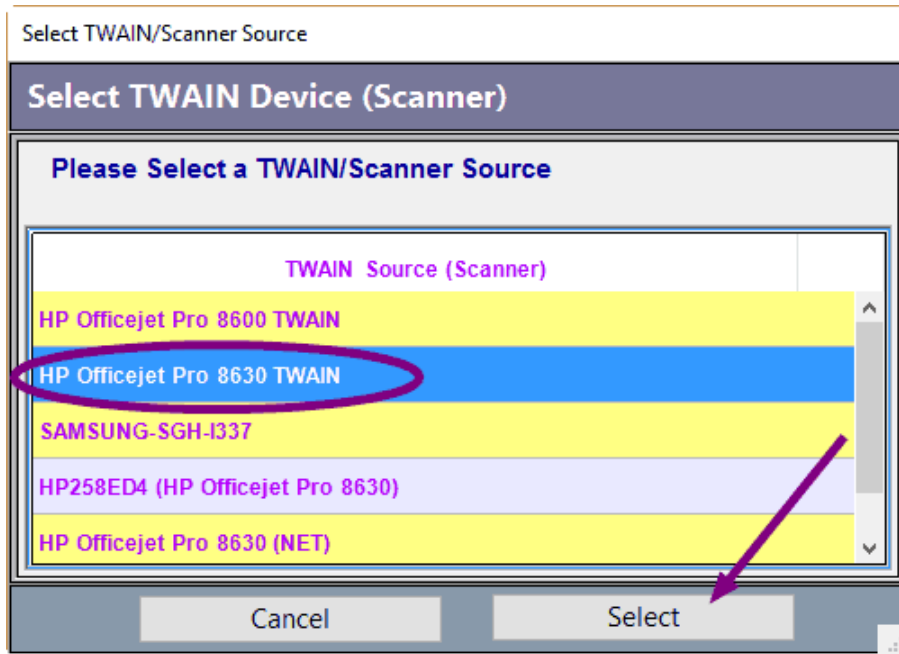
Load from Scanner | Load from Disk | Signature | Send Notice | Survey Check List | Project/Plan Check... | Go To Survey Info

Location Map | Meter/GPS Info | Document Inser... | XC2 Picts | Print | Cancel Save

Notes:

Select Your Twain Enabled Device

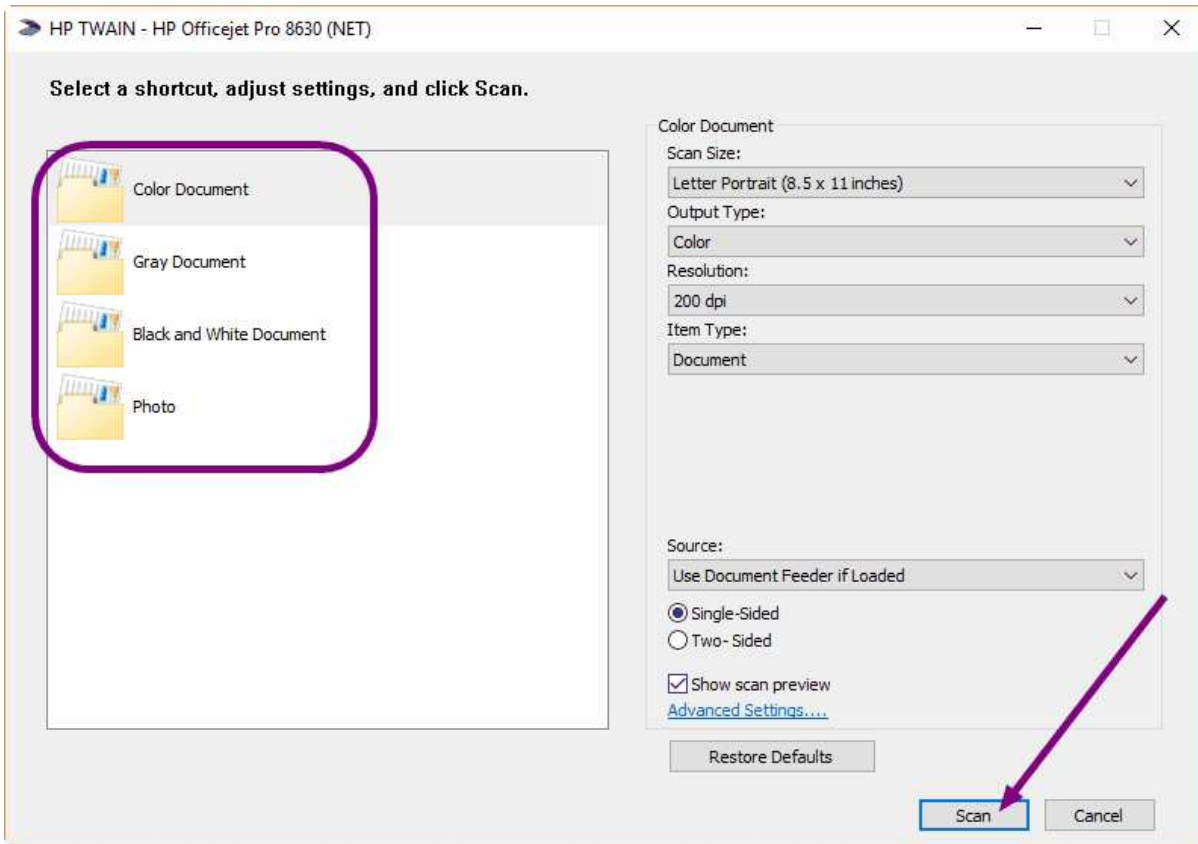
Click Select



Notes:

Select the Scan Preference

Click Scan

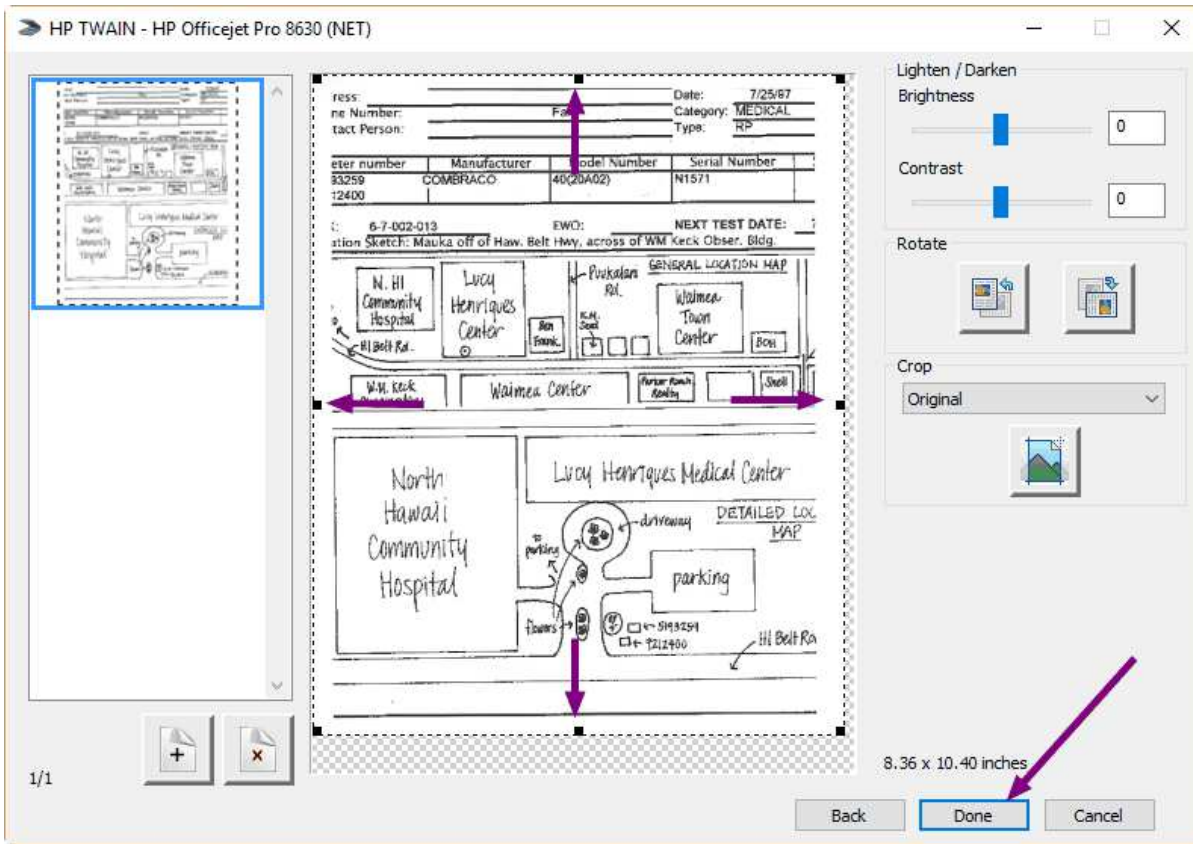


Notes:

Resize and Scan

You can resize the area to be scanned

When ready, Click Done



Notes:

Document Name

You can edit the document name and enter comments.

Click OK

Document Name and Comments

Document Name and Comments

Document Name

Scan: February 16, 2017

Comments

Scan: February 16, 2017
Facility History : February 16, 2017
SURVEY : Survey/Inspection

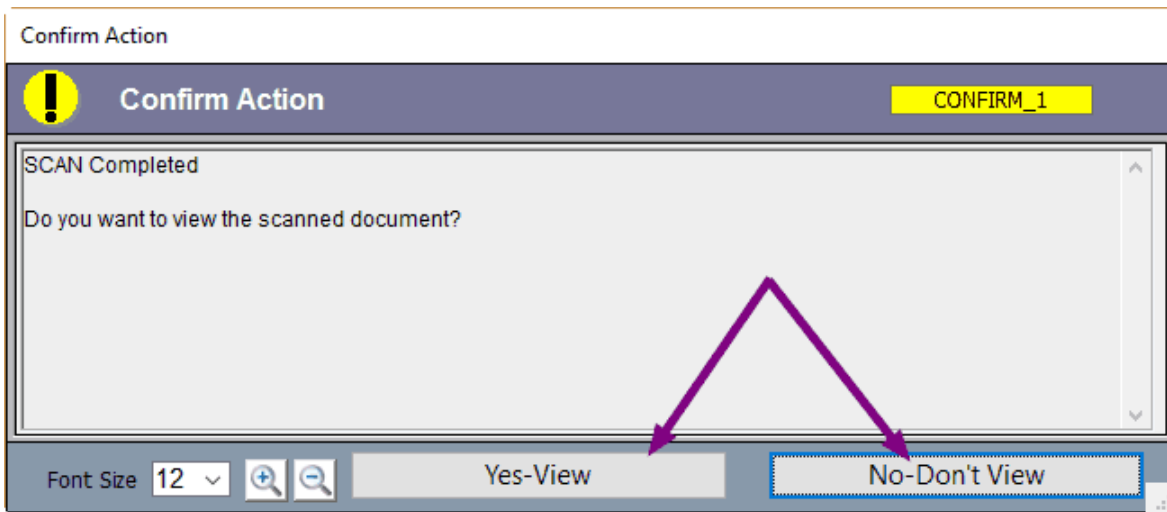
Cancel OK

Notes:

Complete the Import

Your image has been imported

You can choose to view the document or not



Notes:



XC2 Software Knowledge Base



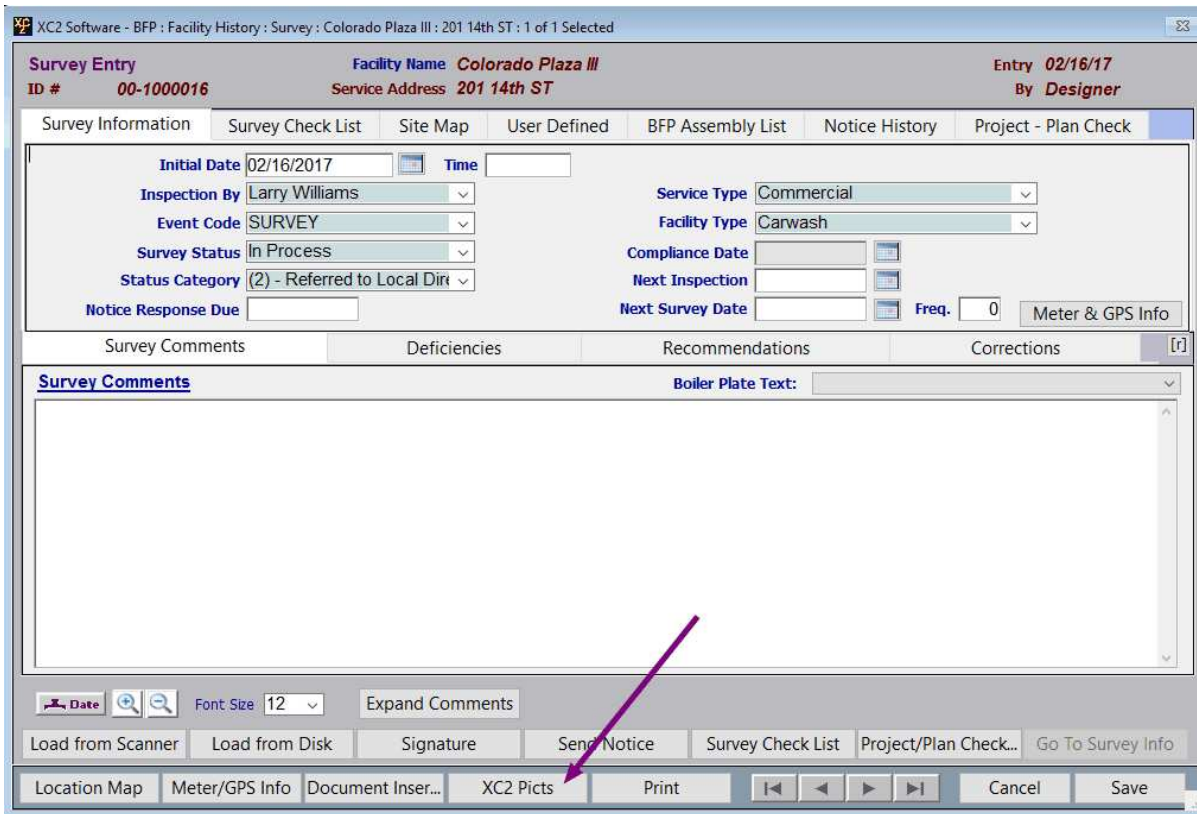
Adding Pictures To The Survey Record

KB Asset ID: 3632

If you have already scanned or uploaded your image into your computer, you can add the image using XC2 Picts

From Within The Survey Record

Click XC2 Picts



Notes:

Load From Disc

XC2 Picts / Site Map : BFP : Facility History : Survey : Colorado Plaza III : 201 14th ST : 1 of 1 Selected

Width 1672 Height 2081 10,438.00 kb Help X

Item Name	Date	Type	S
Scan: February 16, 2017	02/16/17	SCAN	,40

PDF Files: Double-Click above to Display PDF

Title Scan: February 16, 2017

Location: Storage Type: XC2 Blob

More Info Open Document Open Doc Folder

Scan: February 16, 2017
 Facility History : February 16, 2017
 SURVEY : Survey/Inspection

Date

Load from Scanner **Load from Disk**

ress: _____ Date: 7/25/97
 ne Number: _____ Fax: _____ Category: MEDICAL
 tact Person: _____ Type: RP

eter number	Manufacturer	Model Number	Serial Number
83259	COMBRACO	40(20A02)	N1571
12400			

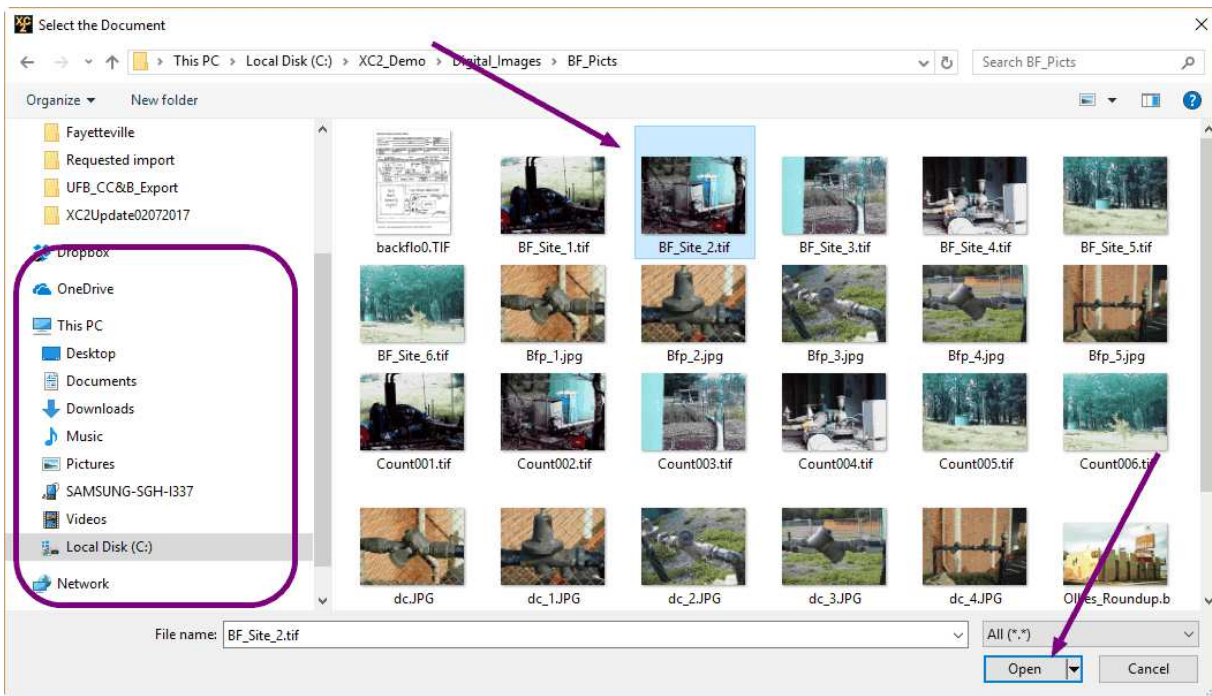
6-7-002-013 EWO: NEXT TEST DATE:
 ation Sketch: Mauka off of Haw. Belt Hwy. across of WM Keck Obser. Bldg.

Reload Picture	Delete Document	Rotate Picture	Expand Image	Save to Disk	Open Document
Move/Rename Document	Show One Only	Preferences	Print Image	Site Map	Done

Notes:

Find The Image

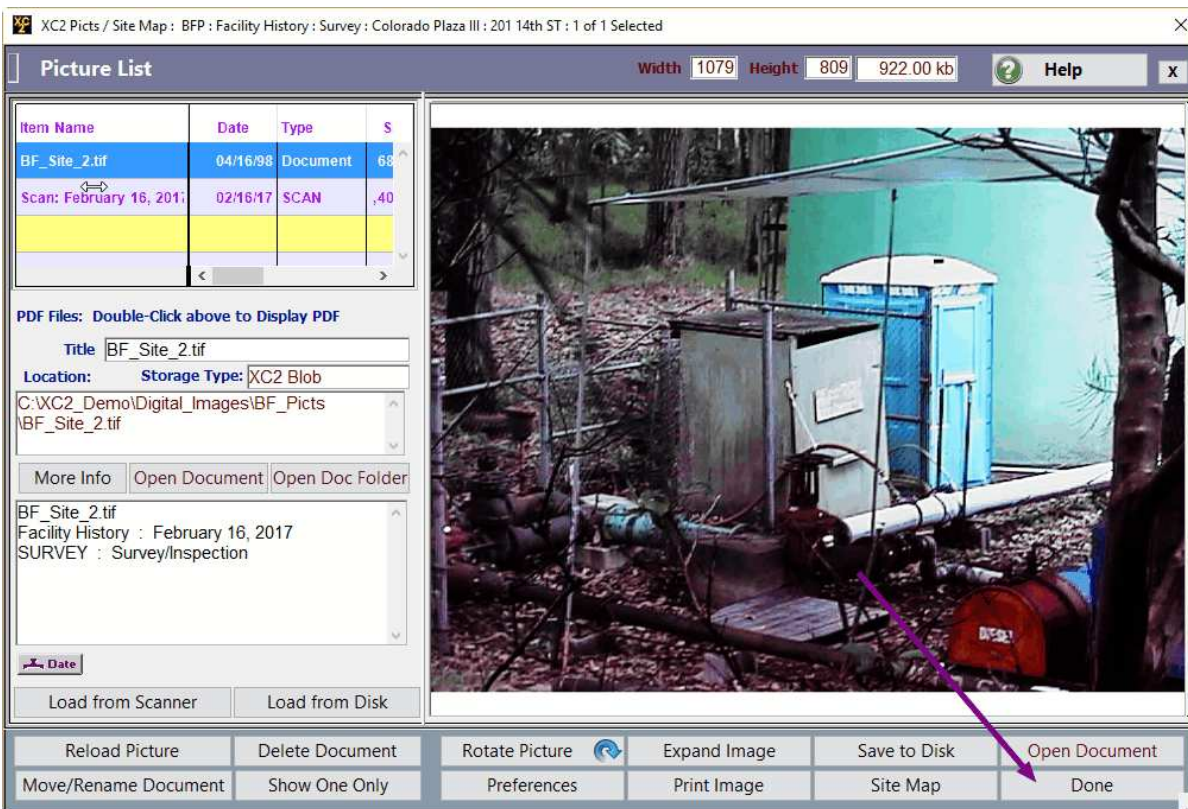
- Navigate to where the image is stored.
- Highlight the image to load
- Click Open



Notes:

Your Image is imported

Click Done



Notes:



XC2 User Manual Reports

- **Export Current List**
- **Overdue Test Reports**
- **Overdue Notice Reports**
- **Program Analytics Report**
- **Year End Compliance Report**



XC2 Software Knowledge Base



How to Export The Current List View In XC2 Backflow

KB Asset ID: 2542

This page describes how to export any list view into either an Excel file (XLS or XML), Text, HTML or copy the list to the clipboard (for pasting into a document).

Example of Export

Most list views can be exported quickly to a variety of different files.

Here is an example of a Facility List exported to Excel.

#	Facility Name	Addr (#)	Street	Site Qty	Sched Code	Next Survey Date	Last Survey Date
1	Metro Dishwasher	3557	Lawton		09-Sep	00/00/00	00/00/00
2	Tom's Fishing Weighters	589	Tanker			00/00/00	00/00/00
3	Littleton Garage Door Service	6669	Scottwood	1	01-Jan	06/01/14	06/01/09
4	Lakewood Family Medical Clinic Pc	7846	Champions	1	01-Jan	12/21/15	12/21/10
5	Polymedica Industries Inc	2672	Hornsea	1	05-May	04/04/11	04/04/06
6	Sheridan Sanitation District #2	7022	Ryan Meadow	1	03-Mar	03/08/13	03/08/08
7	Peck Doran P C	1556	Inverness	1	06-Jun	02/17/11	02/17/06
8	T-M Service CO	1328	Dogwood	1	05-May	02/17/13	02/17/08
9	Mex Imports	6471	Chant	1	12-Dec	01/06/13	01/06/08
10	Tafoya Electric	1795	Church View	1	05-May	08/02/11	08/02/04
11	Taylor's Liquors	445	Perkins	1	01-Jan	07/08/12	07/08/07
12	North Star Liquor	7698	Hunters	1	04-Apr	00/00/00	04/18/02
13	LA Salle Partners	5622	Sterling Glen	1	02-Feb	03/06/13	03/06/08
14	Screenplay Video Centers	7805	Archer	1	11-Nov	00/00/00	11/16/03
15	Willie's Place	8488	Strathmoore	1	11-Nov	02/09/13	02/09/08
16	Graphic Designees	9044	Kelsey	1	12-Dec	11/29/16	11/29/11
17	World Computer Corporation	7816	Yankee	1	02-Feb	11/03/12	11/03/07
18	Specialty Systems	785	Wallsend	1	05-May	05/22/08	05/22/03
19	Mercer William M Incorporated	5707	Chatham	1	01-Jan	02/23/13	02/23/08
20	Sears J L & Associates Real Estate	7323	Fairway	1	08-Aug	00/00/00	08/24/03

Notes:

Create a List

To export a List View, first create a list to export.

Below I have created a list of Facilities.

#	Facility Name	Addr (#)	Street	Site Qty	Sched Code	ext Survey Da	Last Survey Date
1	Metro Dishwasher	3557	Lawton		09-Sep		
2	Tom's Fishing Weighters	589	Tanker				
3	Littleton Garage Door Service	6669	Scottwood	1	01-Jan	06/01/2014	06/01/2014
4	Lakewood Family Medical Clinic Pc	7846	Champions	1	01-Jan	12/21/2015	12/21/2015
5	Polymedica Industries Inc	2672	Hornsea	1	05-May	04/04/2011	04/04/2011
6	Sheridan Sanitation District #2	7022	Ryan Meadow	1	03-Mar	03/08/2013	03/08/2013
7	Peck Doran P C	1556	Inverness	1	06-Jun	02/17/2011	02/17/2011
8	T-M Service CO	1328	Dogwood	1	05-May	02/17/2013	02/17/2013
9	Mex Imports	6471	Chant	1	12-Dec	01/06/2013	01/06/2013
10	Tafoya Electric	1795	Church View	1	05-May	08/02/2011	08/02/2011
11	Taylor's Liquors	445	Perkins	1	01-Jan	07/08/2012	07/08/2012
12	North Star Liquor	7698	Hunters	1	04-Apr		04/18/2011
13	LA Salle Partners	5622	Sterling Glen	1	02-Feb	03/06/2013	03/06/2013
14	Screenplay Video Centers	7805	Archer	1	11-Nov		11/16/2011
15	Willie's Place	8488	Strathmoore	1	11-Nov	02/09/2013	02/09/2013
16	Graphic Designees	9044	Kelsey	1	12-Dec	11/29/2016	11/29/2016
17	World Computer Corporation	7816	Yankee	1	02-Feb	11/03/2012	11/03/2012
18	Specialty Systems	785	Wallsend	1	05-May	05/22/2008	05/22/2008
19	Mercer William M Incorporated	5707	Chatham	1	01-Jan	02/23/2013	02/23/2013
20	Sears, H. & Associates Real Estate	7333	Einigau	1	08-Aug		08/24/2011

Notes:

Export Menu

Next, on the main page, go up to the Export Menu and select Export Current List View

The screenshot shows the XC2 Software interface for the City of Snoqualamish, WA. The main window displays a list of 75 facilities. The 'Export' menu is open, highlighting 'Export Current List View'. A purple arrow points from the 'Export Current List View' option in the menu to the first row of the facility list.

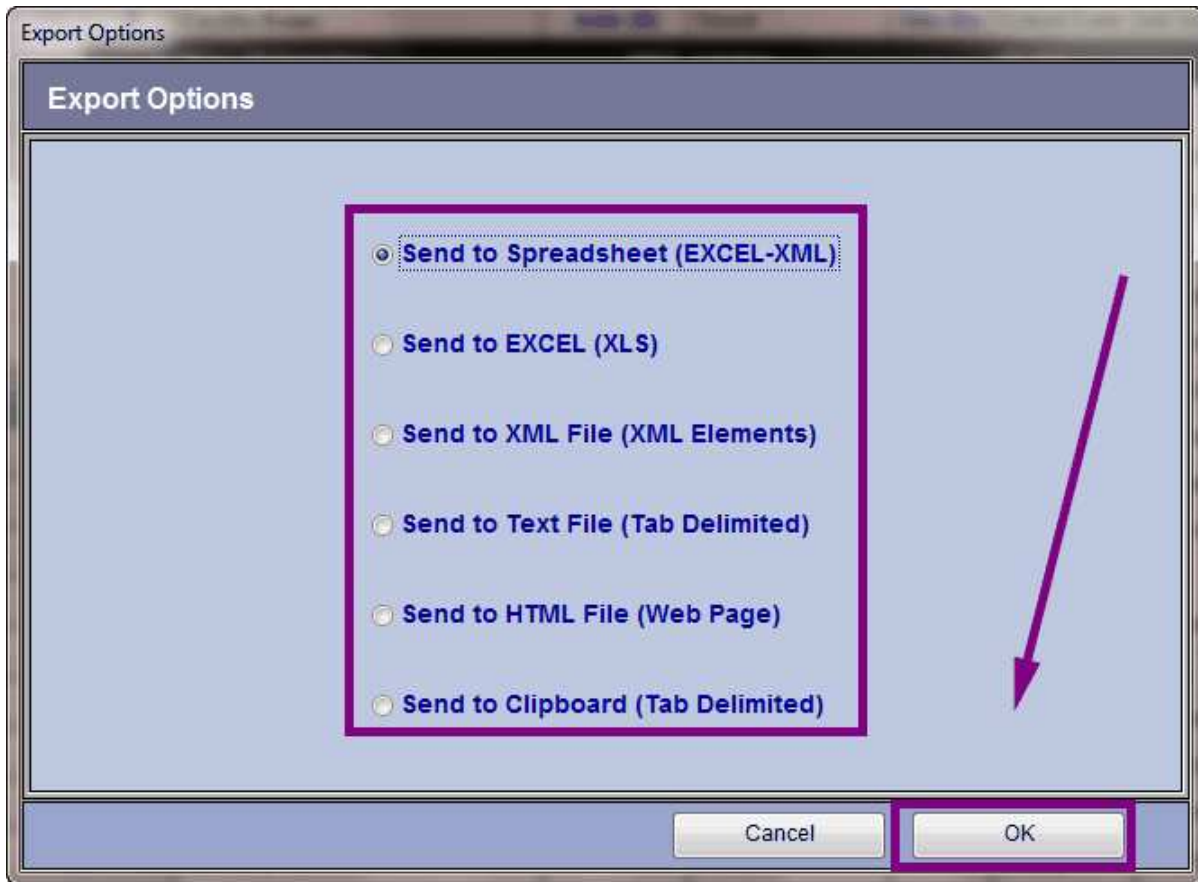
#	Facility Name	Addr (#)	Street	Sit			Last Survey Date
1	Metro Dishwasher	3557	Lawton			09-Sep	
2	Tom's Fishing Weighters	589	Tanker				
3	Littleton Garage Door Service	6669	Scottwood	1	01-Jan	06/01/2014	06/01/200
4	Lakewood Family Medical Clinic Pc	7846	Champions	1	01-Jan	12/21/2015	12/21/201
5	Polymedica Industries Inc	2672	Hornsea	1	05-May	04/04/2011	04/04/200
6	Sheridan Sanitation District #2	7022	Ryan Meadow	1	03-Mar	03/08/2013	03/08/200
7	Peck Doran P C	155	Inverness	1	06-Jun	02/17/2011	02/17/200
8	T-M Service CO	1328	Dogwood	1	05-May	02/17/2013	02/17/200
9	Mex Imports	6471	Chant	1	12-Dec	01/06/2013	01/06/200
10	Tafoya Electric	1795	Church View	1	05-May	08/02/2011	08/02/200
11	Taylor's Liquors	445	Perkins	1	01-Jan	07/08/2012	07/08/200
12	North Star Liquor	7698	Hunters	1	04-Apr		04/18/200
13	LA Salle Partners	5622	Sterling Glen	1	02-Feb	03/06/2013	03/06/200
14	Screenplay Video Centers	7805	Archer	1	11-Nov		11/16/200
15	Willie's Place	8488	Strathmoore	1	11-Nov	02/09/2013	02/09/200
16	Graphic Designees	9044	Kelsey	1	12-Dec	11/29/2016	11/29/201
17	World Computer Corporation	7816	Yankee	1	02-Feb	11/03/2012	11/03/200
18	Specialty Systems	785	Wallsend	1	05-May	05/22/2008	05/22/200
19	Mercer William M Incorporated	5707	Chatham	1	01-Jan	02/23/2013	02/23/200
20	Seare, H. & Associates Real Estate	7323	Esplanade	1	08-Aug		08/24/200

Notes:

Choose the Export file type.

There are 6 different options.

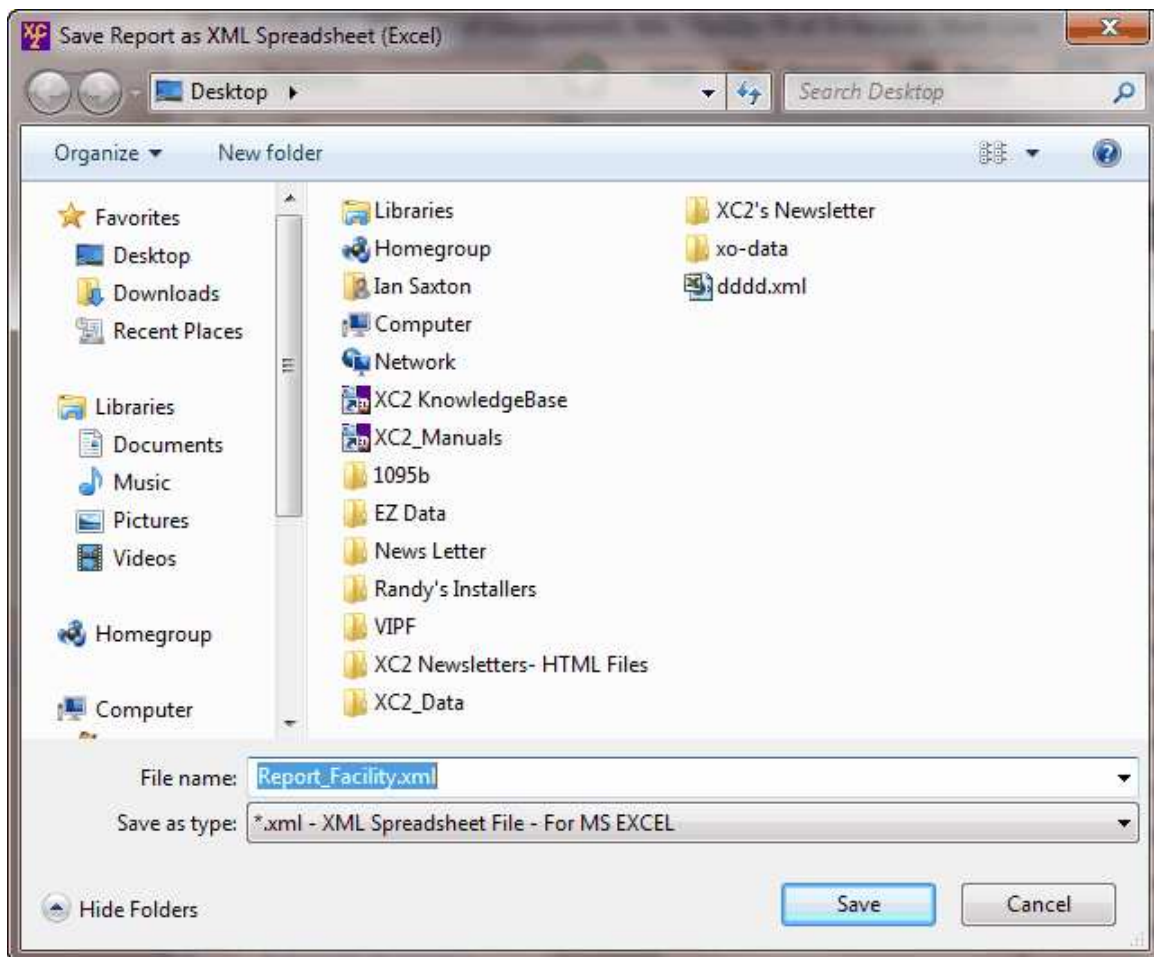
Export to EXCEL (XML) is the default.



Notes:

Save

Choose where the file will be Saved, and give the file a name.



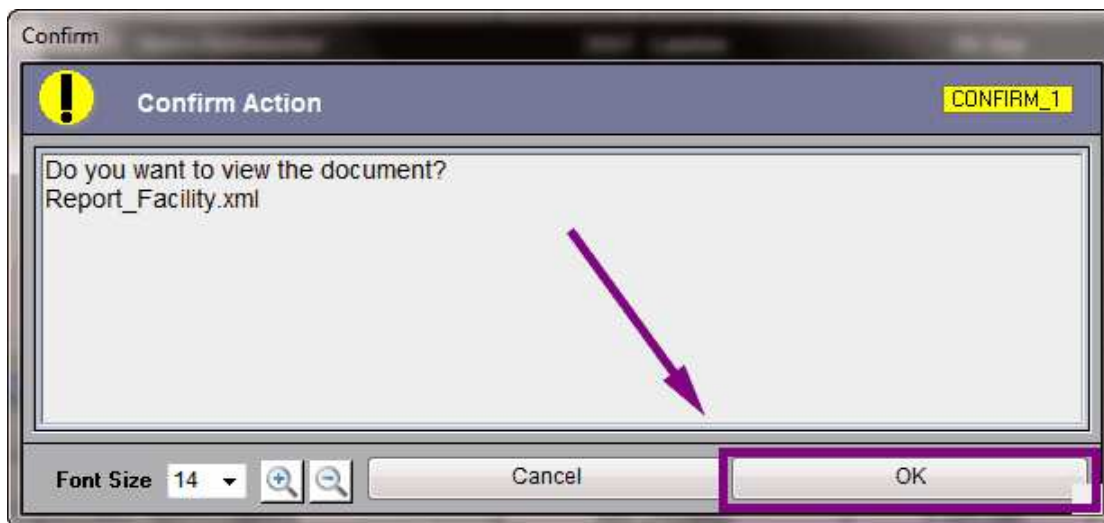
Notes:

Do you want to View the Document?

After the file has been saved, XC2 will ask you if you would like to view the document.

If you would like to view the Export File, click OK.

If you do not want to view the Export File, click Cancel.



Notes:



XC2 Software Knowledge Base



Overdue Test Report

KB Asset ID: 3544

Quickly print report that will list all assemblies that are OVERDUE for testing at time of printing the report.

Report can be printed form any list view.

Click Report

The screenshot shows the XC2 software interface. At the top, there is a title bar: "XC2 Software - BFP : City of Snoqualamish, WA: * Facility: 76 of 76 Records : Multi-Line". Below the title bar is a menu bar with options: "User Options", "Add", "Delete", "Find", "Sort", "Show All", "Export", "Saved Search", and "Report". The "Report" button is highlighted with a red arrow. Below the menu bar is a toolbar with "Special Functions" and a search field containing "Facility" and "76 of 76 Records". The main area is a table with columns: "#", "Facility Name", "Addr (#)", "Street", "Site Qty", "Sched Code", and "Next Surv". The table contains 15 rows of facility data. On the left side, there are two panels: "Select Special Function" and "Favorite Tasks". The "Favorite Tasks" panel has "Facility List" selected. At the bottom, there are buttons for "Send Notice", "Enter Survey", "Enter Test", and "Exit XC2".

#	Facility Name	Addr (#)	Street	Site Qty	Sched Code	Next Surv
1	29th Ave Liquor	4880	Beech Ridge	1	02-Feb	
2	A & B Forest Fresh CO	4415	Ferguson	1	08-Aug	
3	A Flag House	1583	Kim	1	09-Sep	
4	A-Quest Electronics	5289	Preston Mill	1	04-Apr	
5	Academy T V Service	7704	Quarter	1	11-Nov	
6	Academy Veterinary Hospital	8350	Lighthouse	2	08-Aug	
7	Advantage Brokers	5120	Webb	1	12-Dec	
8	Bethesda At St Anthony Hospital North	1802	Woodcreek	3	07-Jul	
9	Bill's Balloon Bonanza	1111	Helium			
10	Boulder Mtn Overcharge Claim Audit	7930	Mays	1	04-Apr	
11	Children's Hospital	1552	Naples National	7	03-Mar	
12	Echosphere Corporation	7210	West View	1	09-Sep	
13	Greg's House of Pancakes	1435	El Monte			
14	Hospital Shared Services Warehouse	5998	Buena Park	1	10-Oct	
15	Hospitality Flowers & Gifts	6725	Sheridan	1	02-Feb	
				92		

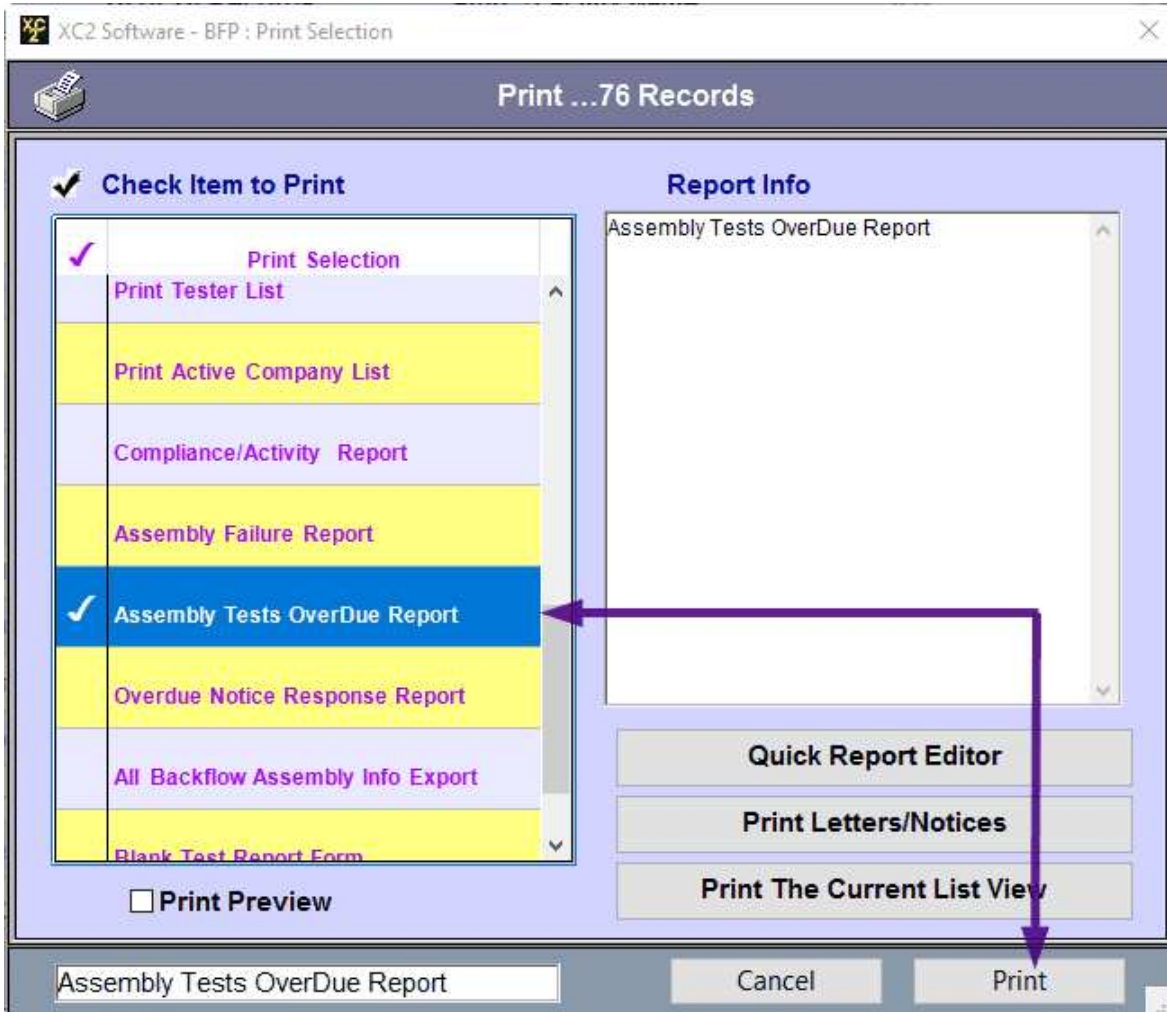
Notes:

Scroll Through List

Highlight the item

Assembly Test Overdue Report

Click Print



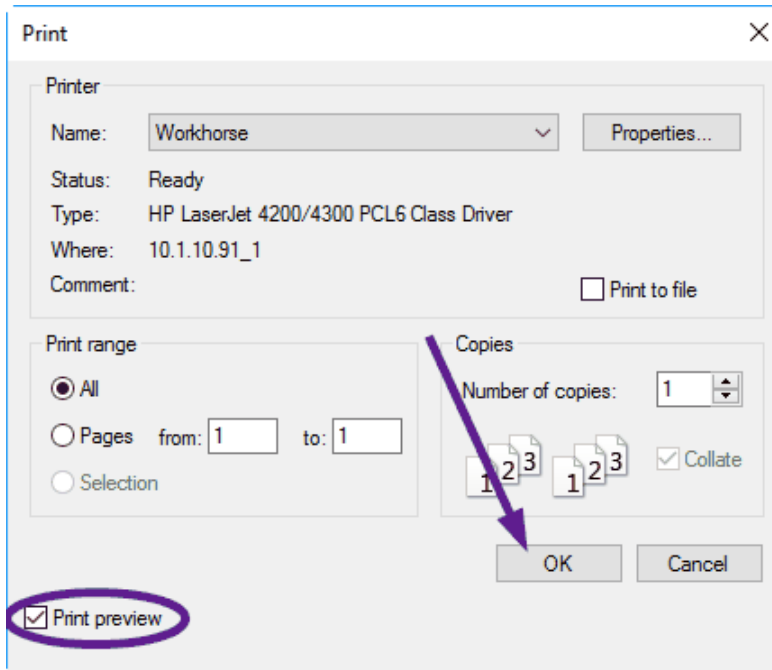
Notes:

Print Preview or Print

When the second print dialog appears, you may choose to preview the report before printing

Check the Print Preview to view report before printing

Click OK to continue



Notes:

Overdue Test Report

Report Prints

- Report Title
- Your Organization Name
- Date of Printing
- Assembly Information
- Page Number

**Backflow Prevention Assembly
Overdue Test Report**

City of Snoqualamish, WA

Printed: 1/4/2017

#	Name/Address	Assembly ID	Location ID	Meter	Due	Last Test	Serial Num	Type
1	Rains-Flo Packings 5102 E Clark-Shaw Rd Snoqualamish	2001187			12/31/10	11/16/09	8142506	RP
2	Lingerie Etc 1760 S Cuyuga Dr Snoqualamish	2001531			12/31/10	04/24/09	626499	RP
3	Southwest Radiographics 9458 S Rolling Ridge Way Snoqualamish	2001532			12/31/10	04/24/09	618940	RP
4	Southwest Radiographics 9458 S Rolling Ridge Way Snoqualamish	2001533			12/31/10	04/24/09	BJ13719	RP
5	Advantage Brokers 5120 S Webb St Snoqualamish	2001616			12/31/10	09/18/09	767008	RP
6	Children's Hospital 1552 Naples National CT Snoqualamish	2002926			03/31/11	01/10/10	126257	RP
7	A-Quest Electronics 5289 W Preston Mill CT Snoqualamish	2002529			04/30/11	12/01/11	123911	RP
8	A & B Forest Fresh CO 4415 N Ferguson Ave Snoqualamish	2002020			08/31/11	08/03/11	2002020	RP
9	Metro Dishwasher 3557 W Lawton St Snoqualamish	2001590			09/30/11	10/12/11	592168	RP
10	U S Hospitality Consultant 2714 Woodsfield CT Snoqualamish	2002989			10/31/11	10/15/10	2002989	RP
11	Hospitality Group Inc The 429 Cali Glen Ln Snoqualamish	2003108			10/31/11	10/10/10	778099	RP
12	Storewise Software Inc 5038 Somerset Rd Snoqualamish	2000406			11/30/11	02/28/10	700314	RP
13	Storewise Software Inc 5038 Somerset Rd Snoqualamish	2000407			11/30/11	02/28/10	115417	DC
14	Resolution Trust Corp 1905 S Hillyer Ave Snoqualamish	2001140			11/30/11	12/01/10	176543	RP

Page: 1

Notes:



XC2 Software Knowledge Base



Overdue Notice Report

KB Asset ID: 3545

Quickly generate a report for all the records that currently have had a test notice sent and have not responded.

Click Report

The screenshot shows the XC2 software interface for 'City of Snoqualamish, WA'. The main window displays a table of 76 records. A red arrow points to the 'Report' button in the top toolbar.

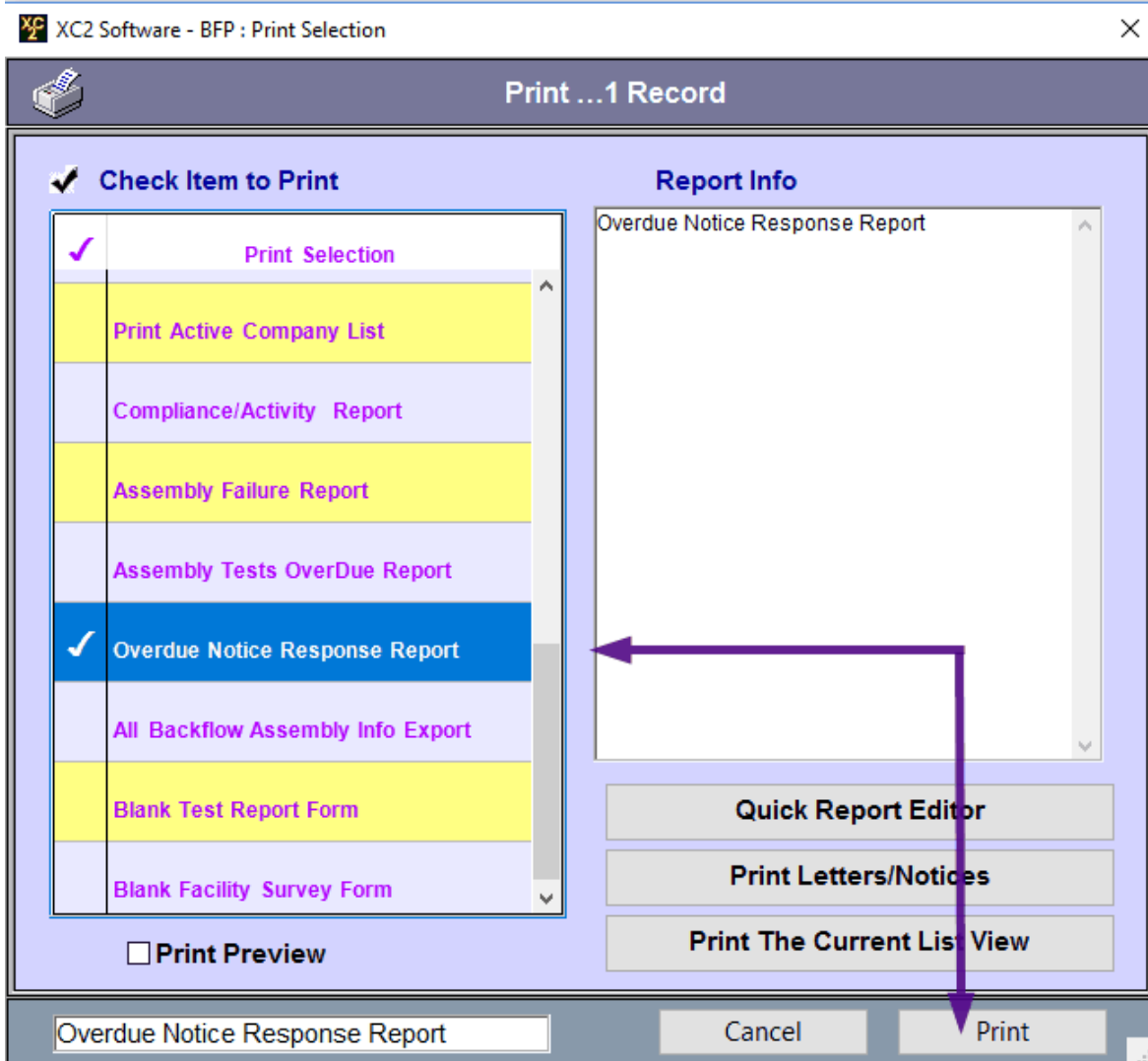
#	Facility Name	Addr (#)	Street	Site Qty	Sched Code	Next Surv
1	29th Ave Liquor	4880	Beech Ridge	1	02-Feb	
2	A & B Forest Fresh CO	4415	Ferguson	1	08-Aug	
3	A Flag House	1583	Kim	1	09-Sep	
4	A-Quest Electronics	5289	Preston Mill	1	04-Apr	
5	Academy T V Service	7704	Quarter	1	11-Nov	
6	Academy Veterinary Hospital	8350	Lighthouse	2	08-Aug	
7	Advantage Brokers	5120	Webb	1	12-Dec	
8	Bethesda At St Anthony Hospital North	1802	Woodcreek	3	07-Jul	
9	Bill's Balloon Bonanza	1111	Helium			
10	Boulder Mtn Overcharge Claim Audit	7930	Mays	1	04-Apr	
11	Children's Hospital	1552	Naples National	7	03-Mar	
12	Echosphere Corporation	7210	West View	1	09-Sep	
13	Greg's House of Pancakes	1435	El Monte			
14	Hospital Shared Services Warehouse	5998	Buena Park	1	10-Oct	
15	Hospitality Flowers & Gifts	6725	Sheridan	1	02-Feb	
				92		

Notes:

Scroll list

Scroll through list until you find Overdue Notice Response Report

Click Print



Notes:

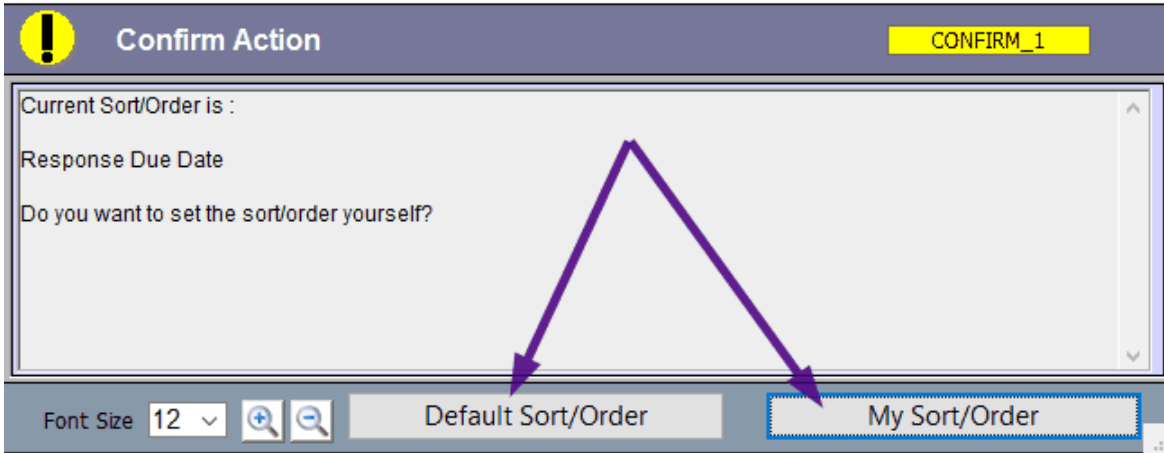
Sort Order

You can elect to print the report in the default order or select the order you wish the list to be in.

In this case we are going to choose the sort order.

My Sort/Order

Confirm Action



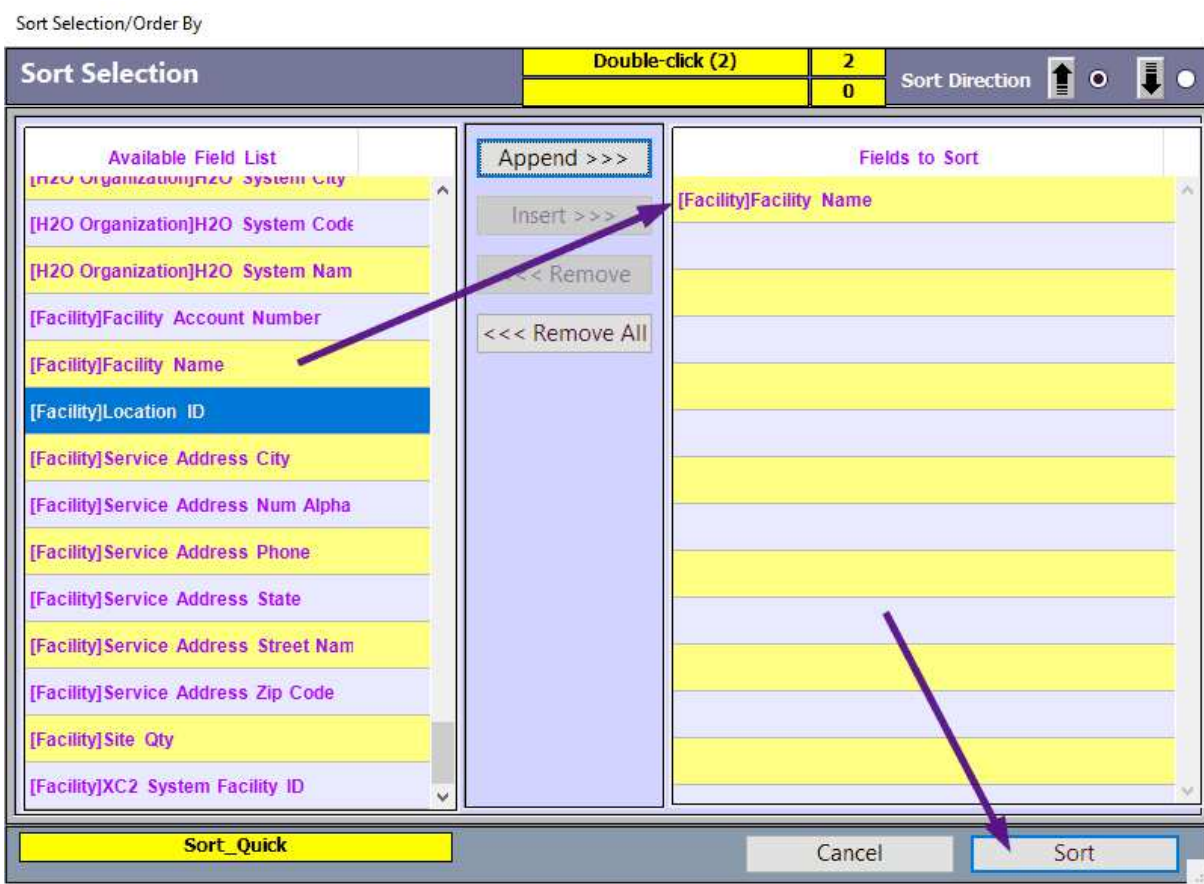
Notes:

Select Sort item

Choose the sort item or items from the list on the right.

You can select more than 1 sort criteria

When finished, Click Sort



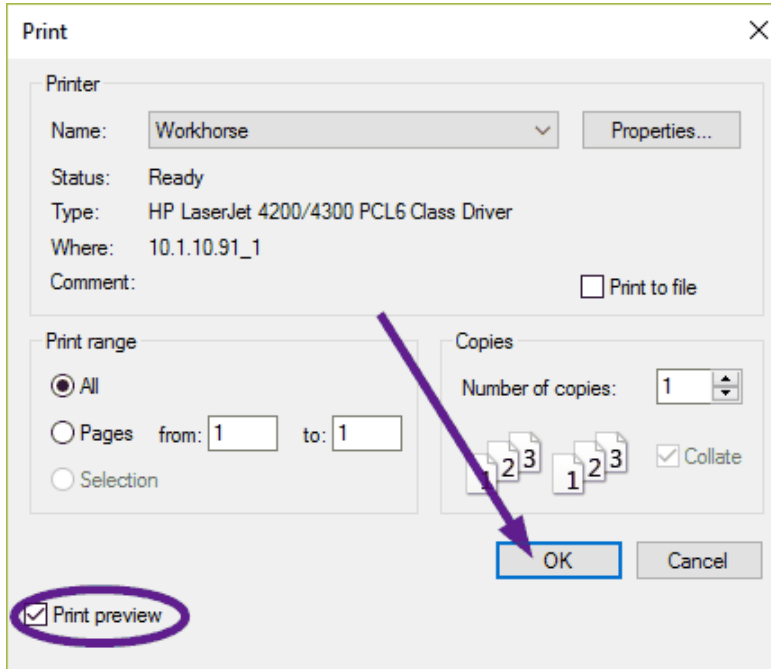
Notes:

Print/Print Preview

You may wish to preview the report before printing.

On the second Print Dialog Box, check the Print Preview box

Click OK



Notes:

Overdue Notice Report

Report is printed sorted by Facility Name

**Backflow Prevention Assembly
Overdue Notice Response Report**

City of Snoqualamish, WA

#	Name/Address	Assembly ID	Location ID	Meter Number	Response Due	Respond To	Printed:	1/4/2017
1	29th Ave Liquor 4880 N Beech Ridge Dr Snoqualami	2001935			03/03/13	Test Due #1		
2	A & B Forest Fresh CO 4415 N Ferguson Ave Snoqualami	2002020			08/31/11	Test Due #1		
3	A Flag House 1583 W Kim Rd Snoqualami	2001033		99999999	01/01/14	Test Due #1		
4	A-Quest Electronics 5289 W Preston Mill CT Snoqualami	2002529	995489	20089-000	12/05/16	Test Due #1		
5	Academy T V Service 7704 E Quarter Way Snoqualami	2001248	1541684	11398-000	12/05/16	Test Due #1		
6	Academy Veterinary Hospital 8350 Lighthouse CT Snoqualiam	2002800	6624499	996878	12/05/16	Test Due #1		
7	Academy Veterinary Hospital 8350 Lighthouse CT Snoqualiam	2002801	9995416	11548	12/05/16	Test Due #1		
8	Advantage Brokers 5120 S Webb St Snoqualami	2001616	221548	13335-000	12/05/16	Test Due #1		
9	Bethesda At St Anthony Hospital North 1802 Woodcreek Pl Snoqualiam	2002873	952154	633848489	12/05/16	Test Due #1		
10	Bethesda At St Anthony Hospital North 1802 Woodcreek Pl Snoqualiam	2002871	11656878	4444888	12/05/16	Test Due #1		
11	Bethesda At St Anthony Hospital North 1802 Woodcreek Pl Snoqualiam	2002872	5415615641	48448	12/05/16	Test Due #1		
12	Boulder Mtn Overcharge Claim Audit 7930 S Mays Ln Snoqualami	2001661	63218	14394-000	12/05/16	Test Due #1		
13	Children's Hospital 1552 Naples National CT Snoqualiam	2000065	115464654	6545865458	12/05/16	Test Due #1		
14	Children's Hospital 1552 Naples National CT Snoqualiam	2002925	9544899	62241596	12/05/16	Test Due #1		

Page: 1

Notes:



XC2 Software Knowledge Base



How To Export: Export Editor

KB Asset ID: 71

How to use the export editor to create exports with different information

Create a List to export

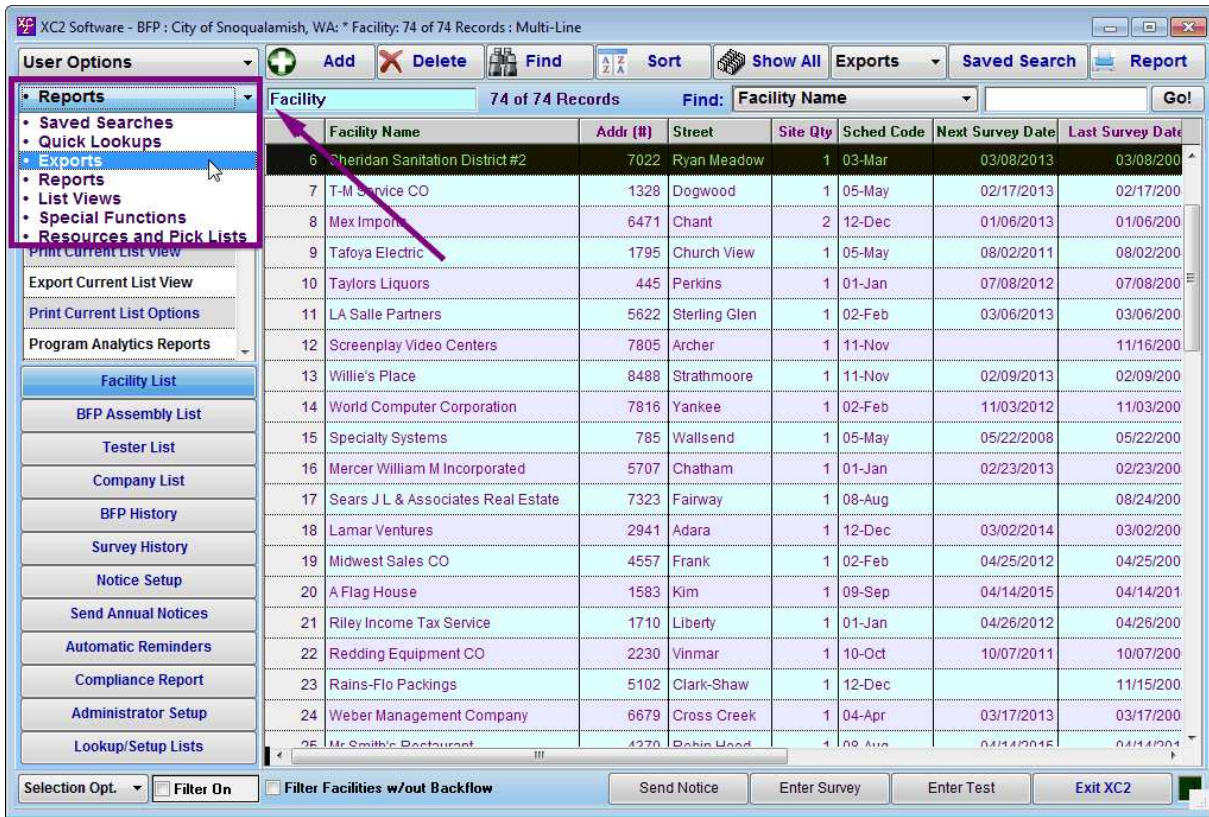
Create a List to Export

#	Facility Name	Addr (#)	Street	Site Qty	Sched Code	Next Survey Date	Last Survey Date	Acct Number	Facility H2O System	Survey
1	Children's Hospital	1552	Naples National	3	03-Mar	11/06/2012	11/06/2007			
2	Bethesda At St Anthony Hospital North	1802	Woodcreek	3	07-Jul	02/21/2013	02/21/2008			
3	Academy Veterinary Hospital	8350	Lighthouse	2	08-Aug	08/14/2011	08/14/2004			
4	Lanyon Sprinkler CO	4709	Prairie Run	2	06-Jun	12/21/2015	12/21/2010	19897-000		
5	Steward Painting & Restoration	3727	Carter's Corner	2	06-Jun			18079-000		
6	Steele Elementary School	6916	Crooked Elm	2	03-Mar	02/08/2013	02/08/2008	16989-000		
7	R L Plimpton Assoc Inc	7480	Lakehurst	2	09-Sep	09/09/2012	09/09/2007	16462-000		
8	Southwest Radiographics	9458	Rolling Ridge	2	12-Dec	01/12/2012	01/12/2007	12762-000		
9	World Wide Funding	197	Maxwell	2	05-May			11993-000		
10	Storewise Software Inc	5038	Somerset	2	11-Nov	02/13/2013	02/13/2008	22782-000		
11	Rainbow Rebuilders	6694	Abbotsford	2	01-Jan	12/22/2011	12/22/2010	22096-000		
12	Seniors in Community Living Inc	9095	Greyson	2	05-May	02/16/2011	02/16/2009	8767-000		
13	Hospitality Group Inc The	429	Cali Glen	1	10-Oct	03/28/2013	03/28/2008			
14	Hospitality Flowers & Gifts	6725	Sheridan	1	02-Feb	02/28/2011	02/07/2003			
15	Hospital Shared Services Warehouse	5998	Buena Park	1	10-Oct	01/26/2012	01/26/2007			
16	Echosphere Corporation	7210	West View	1	09-Sep	09/22/2011	09/22/2006			
17	U S Hospitality Consultant	2714	Woodsfield	1	10-Oct					
18	A-Quest Electronics	5289	Preston Mill	1	04-Apr	08/22/2011	08/22/2004	20089-000		
19	Xelco Collection Service	4535	Willow Park	1	08-Aug	08/11/2012	08/11/2007	19728-000		

Notes:

Export Options

On the Main Page, in the Top Left pulldown menu, select Exports.



Notes:

Create Export

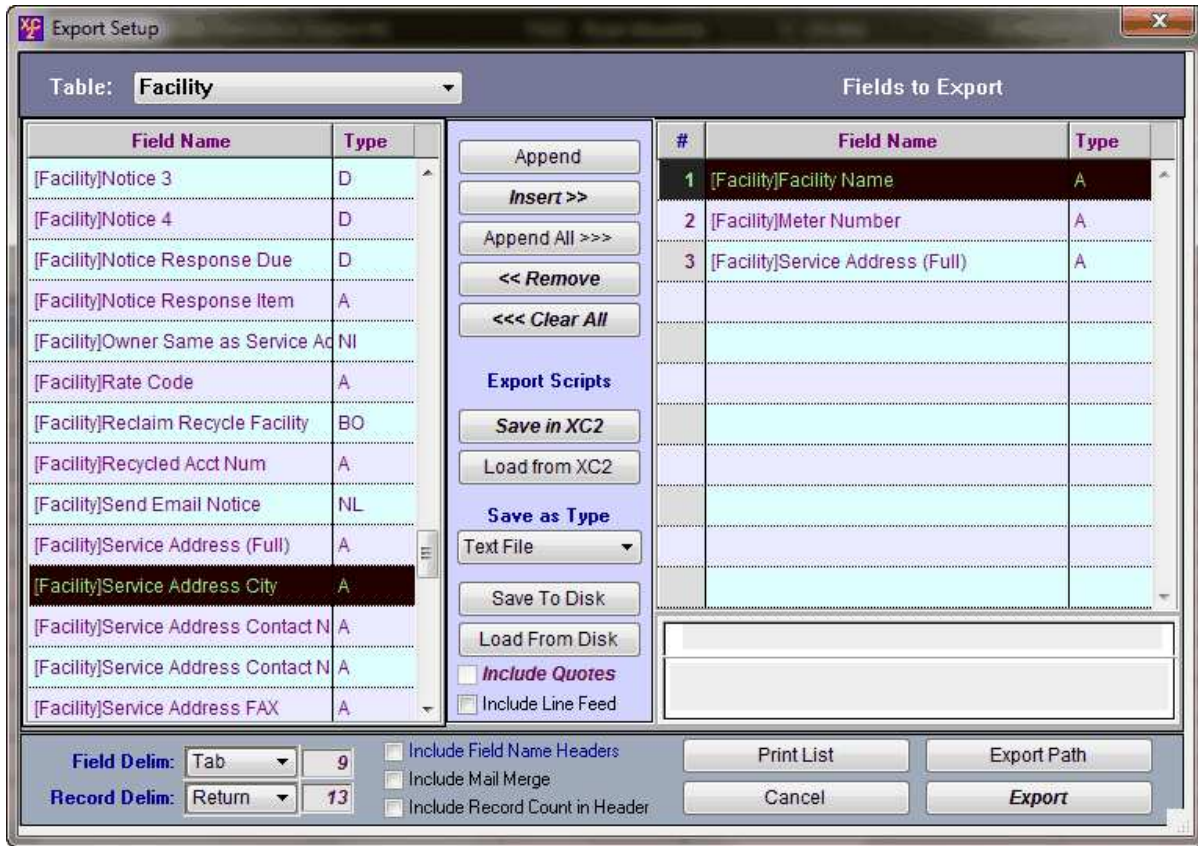
Select Create New Export

The screenshot shows the 'XC2 Software - BFP : City of Snoqualamish, WA: * Facility: 74 of 74 Records : Multi-Line' window. The interface includes a top toolbar with 'Add', 'Delete', 'Find', 'Sort', 'Show All', 'Exports', 'Saved Search', and 'Report'. Below this is a search bar for 'Facility Name' and a 'Go!' button. The main area is a table with columns: '#', 'Facility Name', 'Addr (#)', 'Street', 'Site Qty', 'Sched Code', 'Next Survey Date', and 'Last Survey Date'. The table lists 25 facilities, including 'Sheridan Sanitation District #2', 'T-M Service CO', 'Mex Imports', etc. On the left side, there is a vertical menu under 'Exports' with options: 'Run Selected Export', 'Create New Export' (highlighted with a purple box and arrow), '* Scheduled Exports', '* Export Current List View', 'Facility Next Survey Date ()', 'Facility List', 'BFP Assembly List', 'Tester List', 'Company List', 'BFP History', 'Survey History', 'Notice Setup', 'Send Annual Notices', 'Automatic Reminders', 'Compliance Report', 'Administrator Setup', and 'Lookup/Setup Lists'. At the bottom, there are checkboxes for 'Filter On' and 'Filter Facilities w/out Backflow', and buttons for 'Send Notice', 'Enter Survey', 'Enter Test', and 'Exit XC2'.

Notes:

Export Editor

In the Export Editor Select the type of fields that you would like to export



Notes:

Save Export

In Script Name Choose a name for your Export

Click Save

Export Scripts

Saved Scripts: Export IMPORT/EXPORT.02

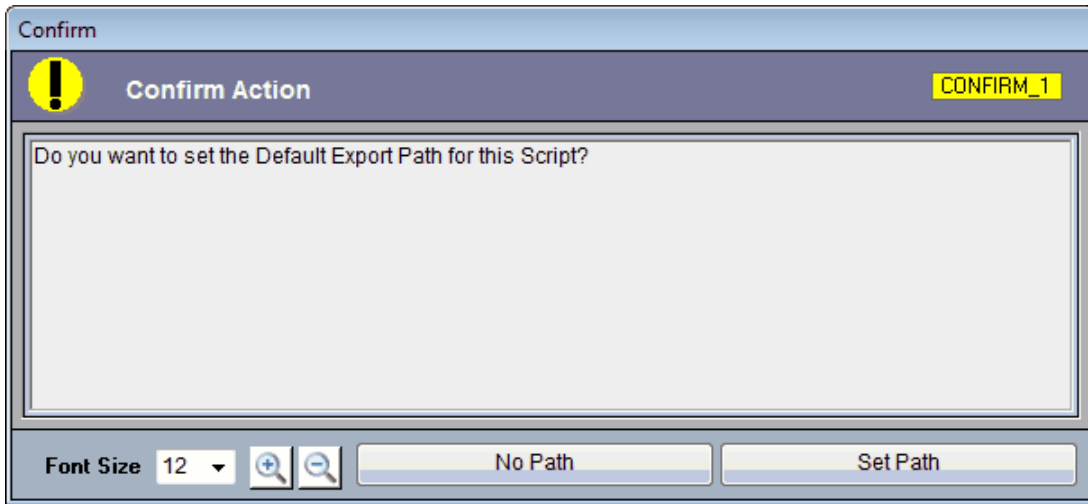
Script Name:

Saved Name	Last Saved Date	Next Scheduled Date	Last Saved By
Facility Next Survey Date	12/19/2011		

Notes:

Confirmation

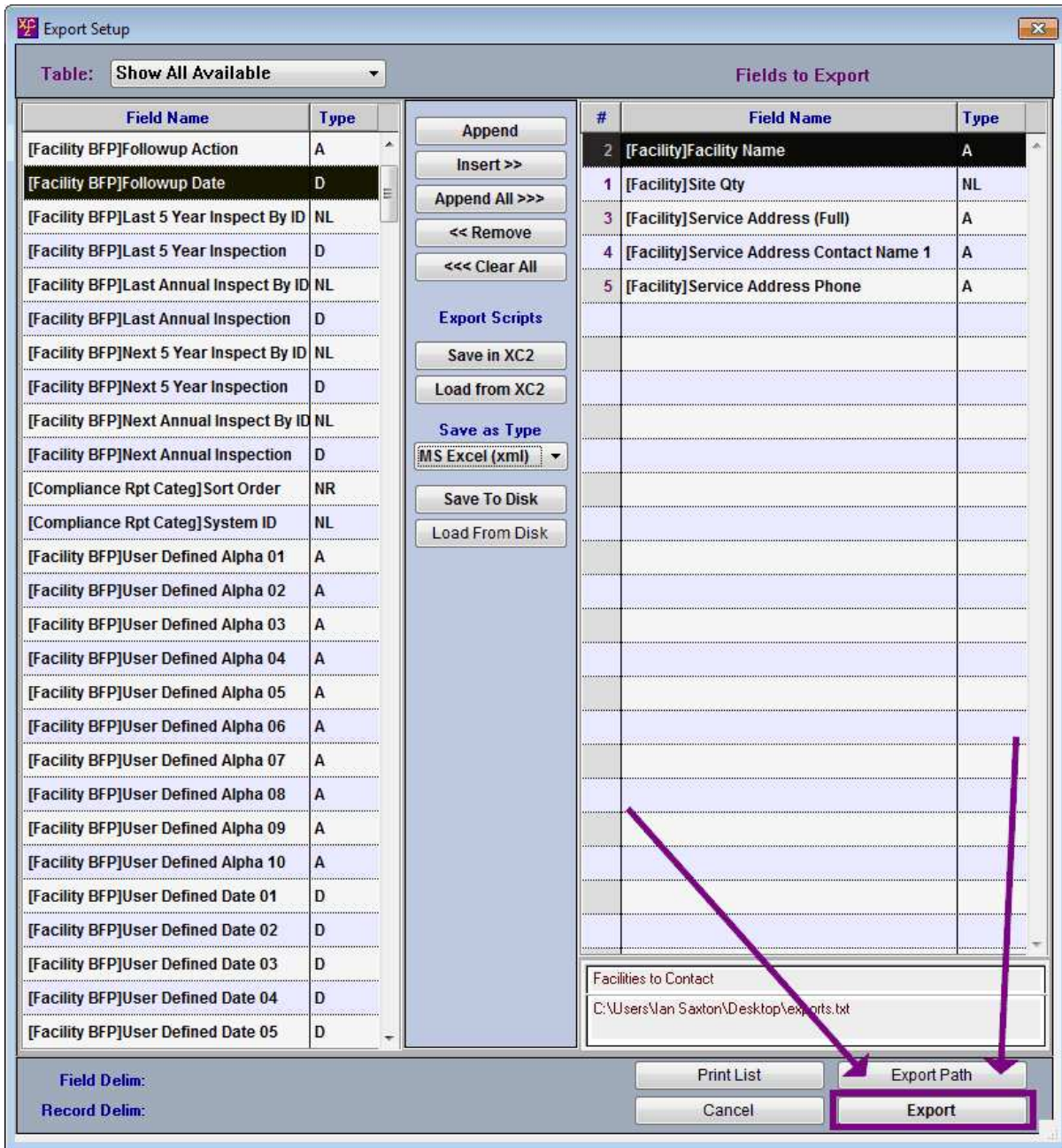
XC2 will ask you if you would like to set the Default Export Path.



Notes:

Export

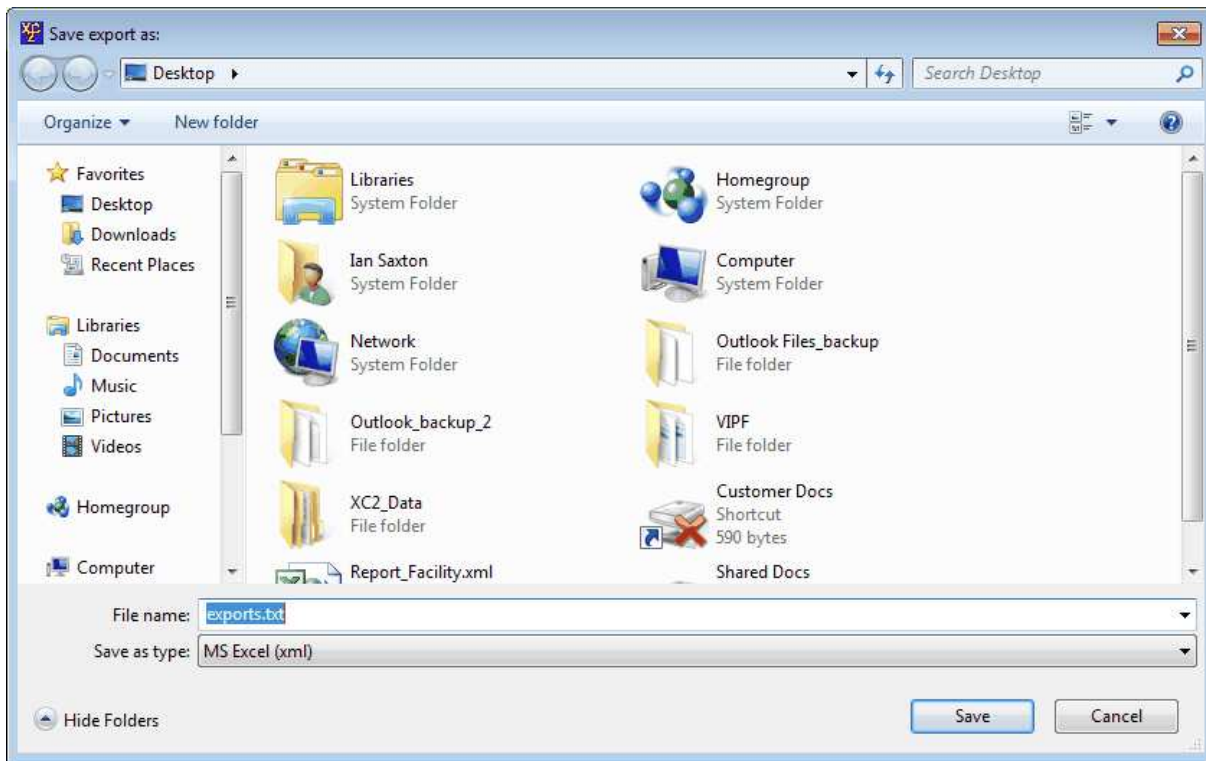
When you are ready to Export, press Export.



Notes:

Choose Location

Choose where you want to save the export.



Notes:

Open

Once saved, you can open the export.

#	Facility Name	Addr (#)	Street	Site Qty	Sched Code	Next Survey Date	Last Survey Date	Acct Numb
1	Children's Hospital	1552	Naples National	3	03-Mar	11/06/12	11/06/07	
2	Bethesda At St Anthony Hospital North	1802	Woodcreek	3	07-Jul	02/21/13	02/21/08	
3	Academy Vetennary Hospital	8350	Lighthouse	2	08-Aug	08/14/11	08/14/04	
4	Lanyon Sprinkler CO	4709	Prairie Run	2	06-Jun	12/21/15	12/21/10	19897-000
5	Steward Painting & Restoration	3727	Carter's Corner	2	06-Jun	00/00/00	00/00/00	18079-000
6	Steele Elementary School	6916	Crooked Elm	2	03-Mar	02/08/13	02/08/08	16989-000
7	R L Plimpton Assoc Inc	7480	Lakehurst	2	09-Sep	09/09/12	09/09/07	16462-000
8	Southwest Radiographics	9458	Rolling Ridge	2	12-Dec	01/12/12	01/12/07	12762-000
9	World Wide Funding	197	Maxwell	2	05-May	00/00/00	00/00/00	11993-000
10	Storewise Software Inc	5038	Somerset	2	11-Nov	02/13/13	02/13/08	22782-000
11	Rainbow Rebuilders	6694	Abbotsford	2	01-Jan	12/22/11	12/22/10	22096-000
12	Seniors in Community Living Inc	9095	Greyson	2	05-May	02/16/11	02/16/09	8767-000

Notes:



XC2 User Manual

XC2 Picts

- **Enable XC2 Picts in My User Preferences**
- **Document Storage Options**
- **Display 1 Image or Multiple**
- **Image Warning/Maximum Sizes**
- **Open Image To Full Screen**



User Preference Setup - Adding Pictures To XC2

KB Asset ID: 3531

In order for an XC2 user account to load images into XC2, their user preferences must be configured.

Open My User Preferences

- User Options
- My Colores and Themes

#	Facility Name	Last Status	Addr (#)	Street	Next Test	Last Test	Serial Number
	Mex Imports	PASS	6471	Chant	02/28/14	12/10/10	54548

Notes:

Set Your Picts Preference

Click the Startup Prefs tab

- Check the Box XC2 Picts Access

If you will storing multiple pictures within a record, (recommended) select

- Show Mutple Pictures

User Preferences: backflowtester

General Prefs Startup Prefs My Colors and Themes Home Page Prefs BFP Screen Sets Email PDF Prefs

Set Startup Preferences

Startup Notification Check for XC2 Updates on Startup

Display Home Page at Startup Display Palette at Startup No Home Page or Palette

Use - Main Screen Feature Use "Type Ahead" for Lookups

Startup List View - BFP

Display Equipment List Display Facility List Display Testers List

Startup List View - FOG

Display Interceptor List Display Facility List Display Disposal Entry

XC2 Picts Preferences

XC2 Picts Access Add if no records found Load Image Document Scan/Aquire Image

Image Warning Size kb XC2 Picts - Don't Confirm External Viewer

Image Maximum Size kb Use New External Launch Routine

XC2 Picts - Open to Full Screen

List View Preferences

Initial Max Records Displayed Main Page - Show Admin Pref/Resource Menus

Single-Click Main Page Functions List to Activate Single-Click Main Page Favorites List to Activate

Type Ahead in List View

Use Type Ahead Maximum Number of Records (Too Many Records may slow performance)

Use Default Prefs Only for Fonts/Sizes/Style/Color

User Pref List Password History Change Password Application Launch ... Quick Search Setup Done

Notes:

XC2 Picts Access Now Available

XC2 Software - BFP : Mex Imports : Location ID : DC : Facility ID: 150 : 1 of 1 Selected

Acct/Address Info	History	Comments	Custom Fields
<p>Service Address Info Mailing Addresses Owner Addresses Property Manager [1]</p> <p>Facility Address Info XC2 Facility ID No: 150 Assembly ID No: 2000617</p> <p>Facility Name Mex Imports</p> <p>Facility Name 2</p> <p>Service Addr. 6471 S Chant CT</p> <p>Addr. 2</p> <p>City ST Zip Snoqualamish WA Zip 98215</p> <p>Facility Contact Info</p> <p>Contact Name Felton Last Torres</p> <p>Position Cell (696) 234-6254</p> <p>Phone (696) 234-6148 Ext #2 (696) 234-6254</p> <p>E-Mail Address</p> <p>H2O_System Lennon River Water</p>	<p>Location ID</p> <p>Meter Acct Num 7280-000 Old Customer Num</p> <p>Meter #</p> <p>Sz UD Date 5</p> <p>Service Type Commercial Haz. Level</p> <p>Hazard Type Hydraulic Equipment</p> <p>Equip Location</p> <p><input checked="" type="checkbox"/> Show Minimum Fields</p> <p>Facility Area Facility Areas Entered Pressure Zone</p> <p>Location Floor Location Room</p> <p>Hazard Contaminant</p> <p>Equipment Fixture Type Flow GPM 0 Line PSI 0</p>	<p>Enter Test</p> <p>Send Notice</p> <p>Work Order</p> <p>Type DC Assembly List</p> <p>Size 1" <input type="checkbox"/> By Pass</p> <p>Mfr Ames <input type="checkbox"/> No Images</p> <p>Model 2000-DCA <input type="checkbox"/> No Site Map</p> <p>Serial Num 545484</p> <p>Status Installed Cnt. Y</p> <p>Next Test Due 02/28/2014 Mo. 2</p> <p>Frequency 12 Months</p> <p>Last/Dflt Tester Vincente Perry View</p> <p>Last Test Date 12/10/2010 PASS</p> <p>Test Form Print Date</p> <p>Inst/Replace By Glen Collins</p> <p>Install Date 01/06/2008 Abv. Grade 0</p> <p>Install Due</p> <p>Replacement Due Date</p> <p>Inst/Replace Date 12/29/2016 Replace</p> <p>Permit Num</p> <p>Schedule Code 12-Dec</p> <p>Protection Type Isolation</p> <p><input type="checkbox"/> Inactive</p> <p><input type="checkbox"/> Back Pressure</p> <p><input type="checkbox"/> Cont. Pressure</p> <p><input type="checkbox"/> Back Siphonage</p> <p><input type="checkbox"/> Impropr. Appl</p> <p><input type="checkbox"/> Impropr. Install</p>	<p>Pictures/Site M... Google Ma... GPS Info Meter Info New BFP Record Search Report/Print Cancel Save</p>

Notes:



XC2 Software Knowledge Base



XC2 Picts Image and Document Storage Options

KB Asset ID: 3532

The images and documents that you access in XC2 can be stored in alternate locations.

Accessing XC2 Picts Preferences

Open any record type that has the option to load images

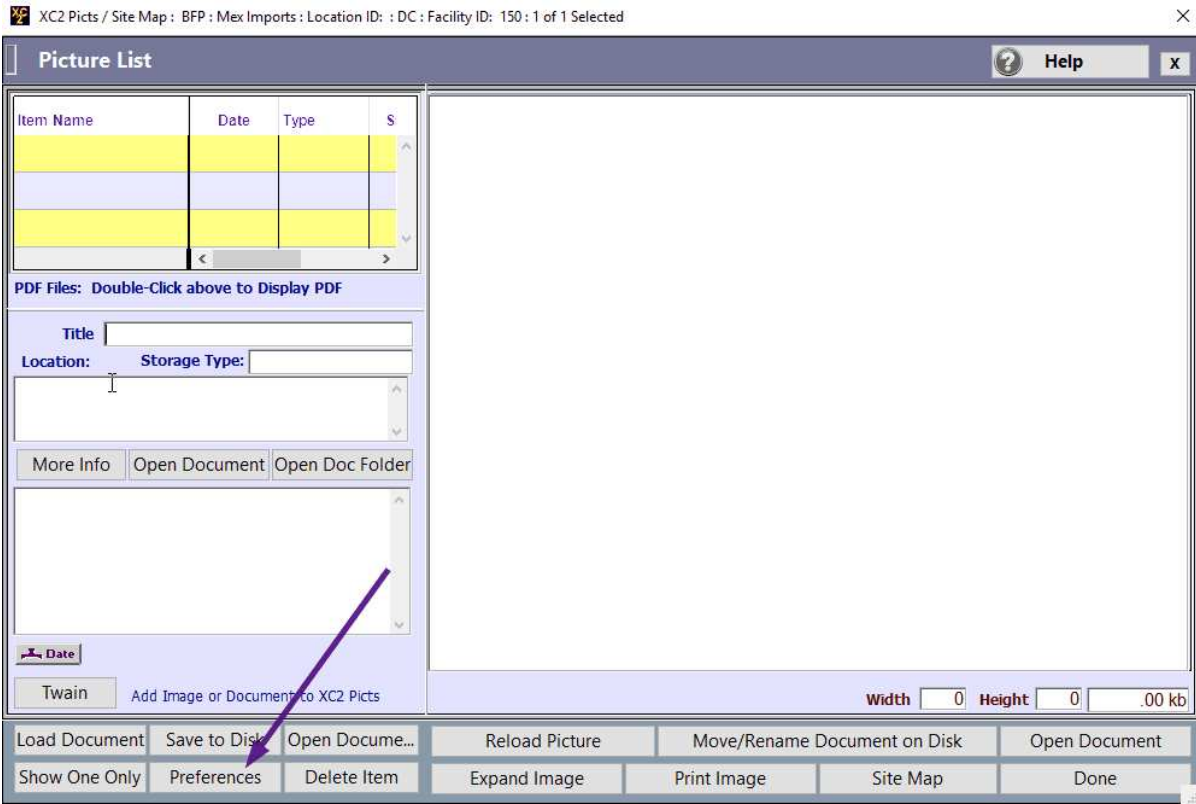
- Click the XC2 Pict button

The screenshot shows the 'XC2 Software - BFP : Mex Imports : Location ID: : DC : Facility ID: 150 : 1 of 1 Selected' window. The form is divided into several sections:

- Facility Address Info:** Facility Name (Mex Imports), Service Addr. (6471 S Chant CT), City (Snoqualamish), State (WA), Zip (98215).
- Facility Contact Info:** Contact Name (Felton), Last (Torres), Cell ((696) 234-6254).
- Location ID:** Meter Acct Num (7280-000), Old Customer Num, UD Date 5, UD Date 6.
- Service Type:** Commercial, Hazard Type (Hydraulic Equipment).
- Test History:** Type (DC), Size (1"), Mfr (Ames), Model (2000-DCA), Serial Num (545484), Status (Installed), Next Test Due (02/28/2014), Frequency (12 Months), Last/Dflt Tester (Vincente Perry), Last Test Date (12/10/2010), Test Form Print Date.
- Inst/Replace By:** Glen Collins, Install Date (01/06/2008), Install Due, Replacement Due Date, Inst/Replace Date (12/29/2016), Permit Num, Schedule Code (12-Dec), Protection Type (Isolation).
- Bottom Section:** Facility Area, Location Floor, Hazard Contaminant, Equipment Fixture type, Pressure Zone, Location Room, Flow GPM (0), Line PSI (0).

A red arrow points to the 'Pictures/Site M...' button in the bottom toolbar.

Notes:



Notes:

Document Saving Tab

Option 1

- Stores a copy of the image in the XC2 data file - Source can be removed to view images

Option 2

- Store XC2 Pict on Disc In Original Location - Source cannot be removed to view images

Option 2

- Store XC2 Picts on Disc in different folder - This option requires that the location indicated must be available to ALL users and XC2 server. Drive letter and location name must be the same

XC2Picts Preferences

XC2 Picts Preferences

Document Types	Document Saving	User Prefs	Codecs
<div style="background-color: #ffff00; padding: 5px; border: 1px solid black;"> <input type="radio"/> Store XC2Picts in XC2 Data File <input type="radio"/> Store XC2Picts on Disk in Original Location <input checked="" type="radio"/> Store XC2Picts on Disk in Different Folder (Indicate Below) </div> <p>Saved Directory Path (Must be available to all users and server) Browse</p> <div style="border: 1px solid black; background-color: #90ee90; padding: 2px; width: 100%;">C:\XC2_Pictures\</div> <p><small>Examples: Mapped Drive or UNC Path D:\XC2Picts (On local Drive) Q:\XC2Picts (Where "Q" is a mapped/shared Drive) \\Shared_Server\D\XC2Picts (Where "Share_Server" is Server UNC Name)</small></p> <p><input type="checkbox"/> Manually Rename/Move Document When Saving <input type="checkbox"/> Rename/Move Automatically by XC2</p> <p><input type="checkbox"/> Keep Original Document Name as Title</p> <p><input type="checkbox"/> Create Thumbnail <input type="radio"/> 48 x 48 <input type="radio"/> 64 x 64 <input type="radio"/> 128 x 128 <input type="radio"/> 256 x 256</p>			
<input type="button" value="Cancel"/>		<input type="button" value="OK"/>	

Notes:



XC2 Pics - Show 1 or Multiple Images

KB Asset ID: 3641

This Page Describes how to switch between 1 image or multiple image pic screen.

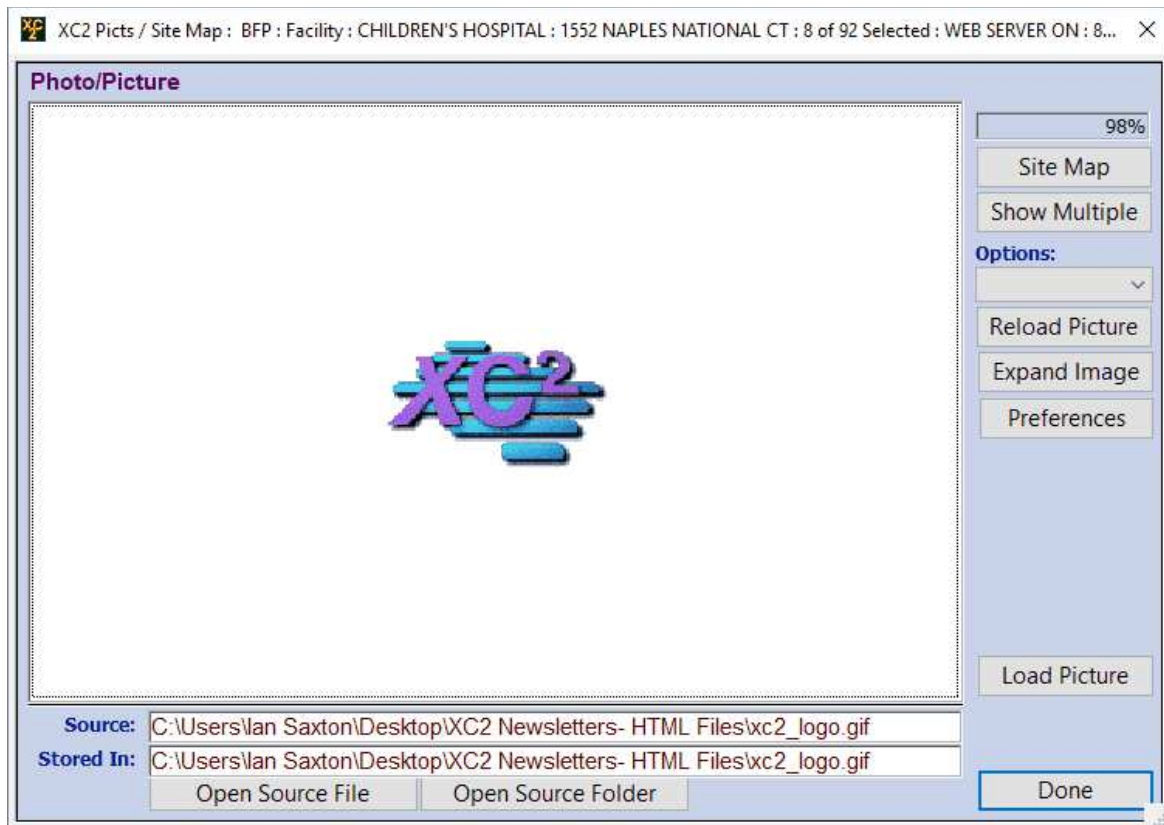
Two Different Picture Screens

In XC2 you can choose between two differnt picture screens

- 1) Show 1 Image
- 2) Show Multiple images

The page will describe how to chage between the two screen sets.

One Image View



Notes:

Multi Image View

XC2 Picts / Site Map : BFP : Facility : CHILDREN'S HOSPITAL : 1552 NAPLES NATIONAL CT : 8 of 92 Selected : WEB SERVER ON : 80 : WEB BFP Test

Picture List Width 104 Height 60

Item Name	Date	Type	Si
xc2_logo.gif	06/24/14	Document	

PDF Files: Double-Click above to Display PDF

Title: xc2_logo.gif
Location: Storage Type: XC2 Blob
C:\Users\lan Saxton\Desktop\XC2 Newsletters-HTML Files\xc2_logo.gif


More Info Open Document Open Doc Folder

xc2_logo.gif
Facility : March 1, 2017

Date

Load from Scanner Load from Disk

Reload Picture Delete Document Rotate Picture Expand Image Save to Disk Open Document
Move/Rename Document Show One Only Preferences Print Image Site Map Done

The image shows a 3D-style logo with the letters 'XC2' in a stylized, blocky font. The 'X' is purple and blue, while the 'C' and '2' are primarily blue with purple highlights. The logo has a slight shadow and a metallic or glossy appearance.

Notes:

Open XC2 Pics

You can switch between the image screens inside XC2 picts.

Open a record and click on the XC2 Picts area.

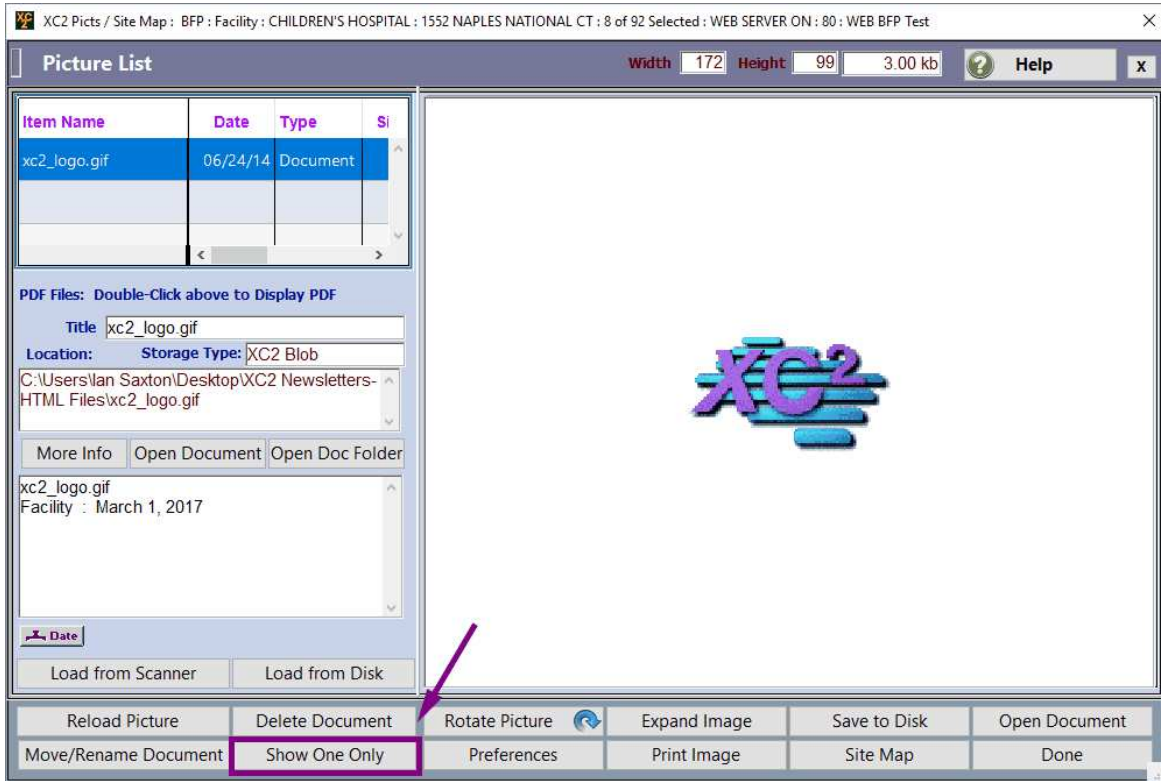
The screenshot displays the XC2 Software interface for a facility record. The window title is "XC2 Software - BFP : Facility : CHILDREN'S HOSPITAL : 1552 NAPLES NATIONAL CT : 8 of 92 Selected : WEB SERVER ON : 80 : WEB BFP Test". The interface is divided into several sections:

- Facility Information:** Includes fields for Facility Name (CHILDREN'S HOSPITAL), Facility Name 2, Service Addr. (1552), Street (NAPLES NATIONAL), State (CT), City ST Zip (SUMMERVILLE SC 29486), Contact Name (CLEO), Last (HERNANDEZ), Position, Phone ((696) 237-6089), and EMail Address.
- XC2 Facility ID:** No: 100062. Includes fields for H2O_System, Location ID (100062), Customer Code (RVWP-7197), Tester Code (VQNN-3632), Group Code, Acct Number, Parcel Number, Last Survey Date (11/06/2007), Next Survey Date (11/06/2012), Schedule Code (03-Mar), and Map Page.
- Assigned Inspector:** Includes fields for Assigned Inspector, Auth. Tester Company, SIC Code, and Rate Code.
- BFP Assembly List:** A table with columns: #, Hazard Type, Serial Num, Type, Size, Mfr, Next Test, Last Test, Active, Count, Status, and Service Address. The first row shows: 1, [blank], EZ30548, DC, 2", WATTS, 02/14/17, 04/16/15, [checkmark], -, Removed, 1552 NAPLES NATIONAL C.
- Buttons:** Quick Test Entry, Enter New Test, New BFP Assembly, Send Notice, Delete Item, View BFP Asse..., Expand List, Exclude Inactive, Pictures/Site M..., Google Maps, Qty BFP (2), Add Facility, Search, Report/Print, Cancel, Save.

Notes:

Multi Image to 1 Image

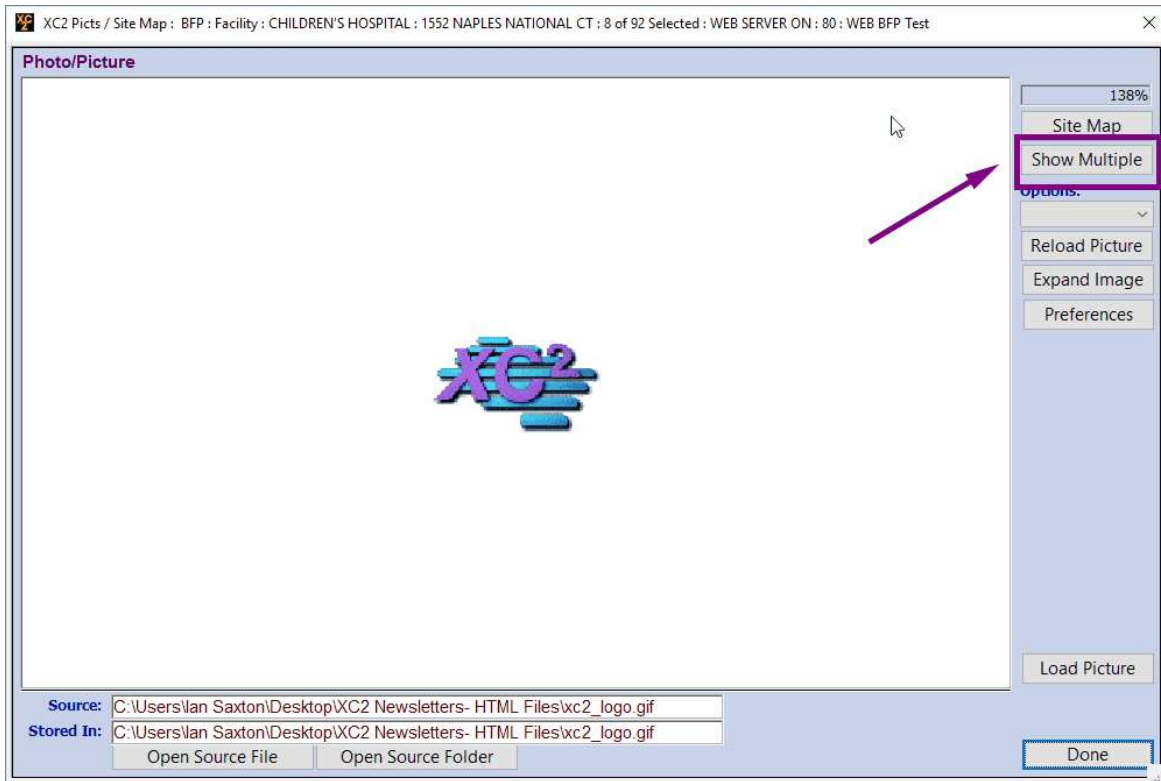
If you the multi image screen is showing click show one only to switch



Notes:

If 1 Image Screen is Selected

If the one image screen is selected click show multiple to change



Notes:



XC2 Picts - Image Warning/Maximum Image Size

KB Asset ID: 3642

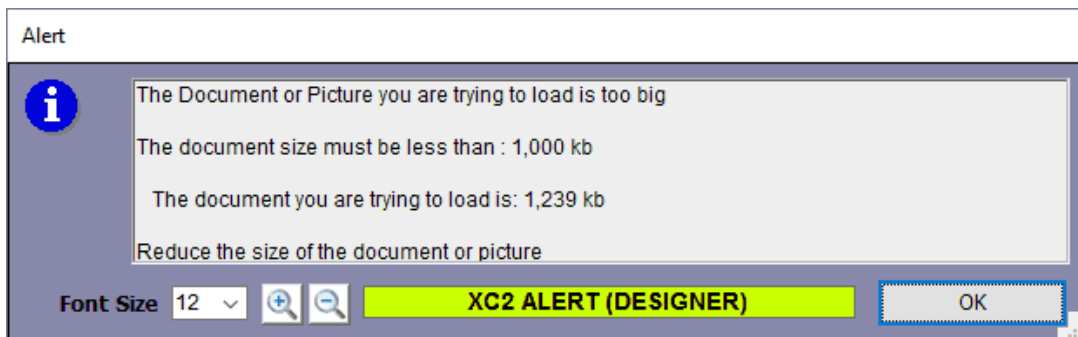
You can set XC2 to warn You when the data image you are uploading is very large. This page describes how to do that.

Warning

Modern Cameras can take some very nice photos but often (even if using a cell phone) the pictures can be quite large.

when uploading pictures to XC2, you are saving a copy of the image inside of the main datafile. If you upload alot of pictures you are going to want to keep the size of the picture down.

To help prevent uploading large image files, you can set a Image Warning message and set the maximum image size available to upload.



Open XC2 Pics

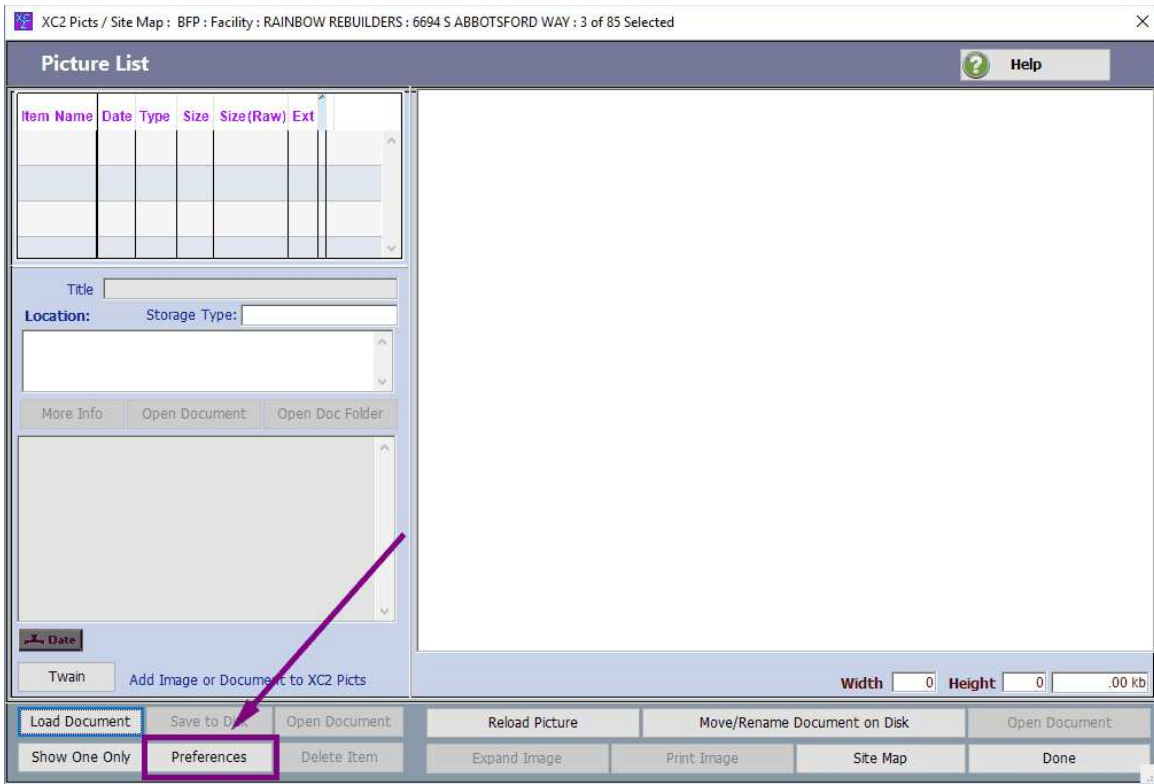
The screenshot shows the XC2 software interface for a facility named 'RAINBOW REBUILDERS'. The interface is divided into several sections:

- Facility Information:** Facility Name: RAINBOW REBUILDERS, Service Addr: 6694 S ABBOTSFORD WAY, City ST Zip: SNOQUALAMISH WA 98215, Contact Name: KIM, Last: COX, Cell: (696) 236-1338, EMail Address: IAN.SAXTON@XC2SOFTWARE.COM.
- XC2 Facility ID:** No: 45, Sub Division: FARMINGDALE METRO WATER, Location ID: 45, Customer Code: PMVB-1754, Tester Code: UPUC-9541, Group Code: [blank], Acct Number: 22096-000, Parcel Number: 18367, Last Survey Date: 12/22/2010, Next Survey Date: 12/22/2011, Schedule Code: 01-Jan.
- Service Type:** IRR, Facility Type: [blank], Facility Status: ACTIVE, Color: 4401650, Assigned Inspector: [blank], Auth. Tester Company: [blank], SIC Code: [blank], Rate Code: [blank].
- BFP Assembly List Table:**

#	Hazard Type	Serial Num	Type	Size	Mfr	Next Test	Last Test	Active	Count	Status	Service Address	Equip Location
		VJ23919	RP	2"	Hersey	06/30/16	01/04/16	✓	Y	Installed	123 S WEST WAY	
		829932	DCDA	2 1/2"	Watts	06/30/16	12/07/15	✓	Y	Installed	123 WEST WAY	

At the bottom of the interface, there are buttons for 'Quick Test Entry', 'Enter New Test', 'New BFP Assembly', 'Send Notice', 'Delete Item', 'View BFP Assem...', 'Expand List', and a checkbox for 'Exclude Inactive'.

Open Preferences



Notes:

User Preferences Tab

XC2Picts Preferences

XC2 Picts Preferences

Document Types | Document Saving | **User Prefs** | Codecs

XC2 Picts User Preferences for:

Image Warning Size Add if no records found

Image Maximum Size Load Image Document
 Scan/Aquire Image

XC2 Picts - Open to Full Screen
 XC2 Picts - Use New External Viewer Routine
 XC2 Picts - Don't Confirm External Viewer

Show Multiple Pictures
 Show One Picture Only

Cancel OK

Notes:

Change Size

XC2Picts Preferences

XC2 Picts Preferences

Document Types | Document Saving | **User Prefs** | Codecs

XC2 Picts User Preferences for:

Image Warning Size
Image Maximum Size

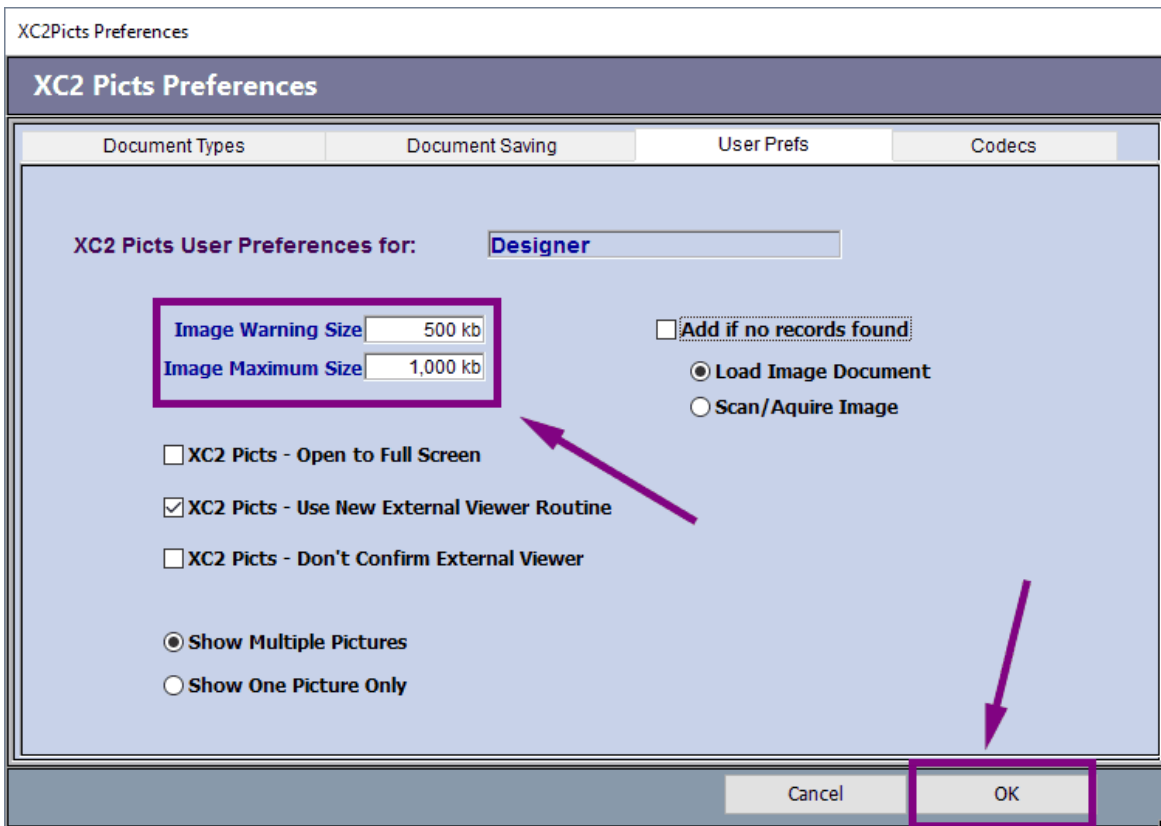
Add if no records found

Load Image Document
 Scan/Aquire Image

XC2 Picts - Open to Full Screen
 XC2 Picts - Use New External Viewer Routine
 XC2 Picts - Don't Confirm External Viewer

Show Multiple Pictures
 Show One Picture Only

Cancel



Notes:



XC2 Picts - Open Full Screen

KB Asset ID: 3643

You can have XC2 picts open to a full screen or open to a smaller moveable window.

Open XC2 Picts

The screenshot shows the XC2 software interface for a facility named 'RAINBOW REBUILDERS'. The interface is divided into several sections:

- Facility Information:** Includes Facility Name (RAINBOW REBUILDERS), Service Address (6694 S ABBOTSFORD WAY), City (SNOQUALAMISH), State (WA), and Zip (98215).
- XC2 Facility ID:** No: 45. Includes Sub Division (FARMINGDALE METRO WATER), Location ID (45), Customer Code (PMVB-1754), Tester Code (UPUC-9541), Group Code, Acct Number (22096-000), and Parcel Number (18367).
- Service Type:** IRR. Assigned Inspector, Auth. Tester Company, SIC Code, and Rate Code are also visible.
- BFP Assembly List Table:**

#	Hazard Type	Serial Num	Type	Size	Mfr	Next Test	Last Test	Active	Count	Status	Service Address	Equip Location
		VJ23919	RP	2"	Hersey	06/30/16	01/04/16	✓	Y	Installed	123 S WEST WAY	
		829932	DCDA	2 1/2"	Watts	06/30/16	12/07/15	✓	Y	Installed	123 WEST WAY	
- Buttons:** Quick Test Entry, Enter New Test, New BFP Assembly, Send Notice, Delete Item, View BFP Assem..., Expand List, Exclude Inactive, Pictures/Site Map, MapPoint, Qty BFP (8), Add Facility, Search, Report/Print, Cancel, Save.

Notes:

User Preferences

XC2Picts Preferences

XC2 Picts Preferences

Document Types | Document Saving | **User Prefs** | Codecs

XC2 Picts User Preferences for:

Image Warning Size Add if no records found

Image Maximum Size Load Image Document
 Scan/Aquire Image

XC2 Picts - Open to Full Screen

XC2 Picts - Use New External Viewer Routine

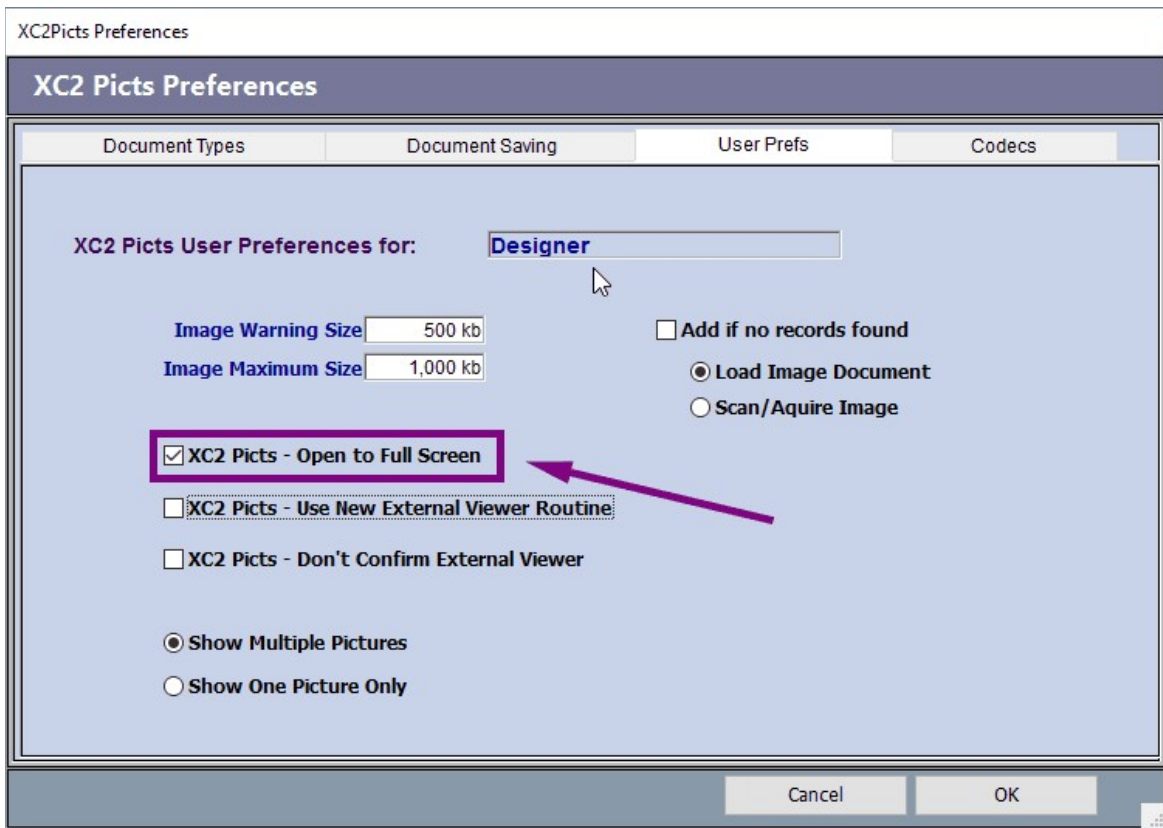
XC2 Picts - Don't Confirm External Viewer

Show Multiple Pictures
 Show One Picture Only

Cancel OK

Notes:

Check Box



Notes:



XC2 User Manual

Work Orders

- **Work Order Overview**
- **Auto Generated Work Orders**
- **Manually Created Work Orders**
- **Creating Work Order Types**



XC2 Software Knowledge Base



Work Order Overview

KB Asset ID: 3634

This page is an overview of the work order screen and describes how to create a new work order.

What is a Work Order

A work order is a scheduled record to perform work

Here is an example of what a work order looks like in XC2

Notes:

Issued Date

This is the Date the Work Order was Issued

Notice the Sceduled date as well

XC2 Software - BFP : * Facility : 0007 : 1 of 1 Selected : WEB SERVER ON : 80 : WEB BFP Test

Work Order Entry Location Map **WO_Input_01_LG** Response Time Hrs ID No 11038106

Facility	JOHNS GRILL	Work Order Num	0
Acct Number		Meter #	
Service Address	63 ELLIS	City	SAN FRANCISCO
Location	LOCATED IN THE SOUTH GARDEN NEXT TO ROSES		
Date Received	02/16/2017	Time Call In	3:35 PM
Received By	DESIGNER	Complete	<input type="button" value="Complete"/>
Issued Date	02/16/2017	WO Status	Scheduled
Date Scheduled	02/25/2017		
Order By/Inspect	SALVADOR GRAY		
Proj Acct Num	PJ420		
Work to Perform	MAINTAIN_BFP		BFP Maintenance

WO Source Complaint Inquiry Other:

Work Description	Boiler Plate Text	Findings and Corrections	Boiler Plate Text	Charges
DEVICE HAS NO MANUFACTURERER TAG/PLATE.		REPLACE TAG/PLATE OR BPD ASSEMBLY WHEN IT FAILS.		Parts
				Total

Date Begin 02/16/2017 Time In Work Done By SALVADOR GRAY
Date Done Time Out Meter Reading Date Read

Line Items XC2 Picts Time Sheet New Print

Notes:

Work Descriptions and Findings

The type of work needed to be performed could be a variety of items.

- Cage Replacement
- Structural Repair
- Painting
- Labeling

What ever it is, type the information here

XC2 Software - BFP : * Facility : 0007 : 1 of 1 Selected : WEB SERVER ON : 80 : WEB BFP Test

Work Order Entry Location Map **WO_Input_01_LG** Response Time Hrs ID No 11038106

Facility JOHNS GRILL Acct Number <input type="text"/> Meter # <input type="text"/> Service Address 63 ELLIS City SAN FRANCISCO Location LOCATED IN THE SOUTH GARDEN NEXT TO ROSES Date Received 02/16/2017 Time Call In 3:35 PM Received By DESIGNER Issued Date 02/16/2017 Complete <input type="button"/> Date Scheduled 02/23/2017 WO Status Scheduled Order By/Inspect SALVADOR GRAY Proj Acct Num PJ420 Work to Perform MAINTAIN_BFP BFP Maintenance	Work Order Num 0 Old New Serial Num 78 78 Type RP Mfr Wilkins Model 975XL2MS Size 3/4" Permit Num <input type="text"/> Work Order Section <input type="text"/> Work Order Priority 1 2 3 4 Coliform Count <input type="text"/> #/100ml <input type="checkbox"/> Lead Pipes found in System <input type="checkbox"/> Contacted Customer
--	---

WO Source Complaint Inquiry Other:

Work Description Boiler Plate Text DEVICE HAS NO MANUFACTURERER TAG/PLATE.	Findings and Corrections Boiler Plate Text REPLACE TAG/PLATE OR BPD ASSEMBLY WHEN IT FAILS.	Charges <input type="text"/> Parts <input type="text"/> Total <input type="text"/>
--	---	---

Date Begin 02/16/2017 **Time In** **Work Done By** SALVADOR GRAY
Date Done **Time Out** **Meter Reading** **Date Read**

Line Items XC2 Picts Time Sheet New Print Cancel Save

Notes:

Reporting

How was this reported?

Do you have to contact someone?

XC2 Software - BFP : * Facility : 0007 : 1 of 1 Selected : WEB SERVER ON : 80 : WEB BFP Test

Work Order Entry Location Map **WO_Input_01_LG** Response Time Hrs ID No 11038106

Facility JOHNS GRILL Acct Number <input type="text"/> Meter # <input type="text"/> Service Address 63 ELLIS City SAN FRANCISCO Location LOCATED IN THE SOUTH GARDEN NEXT TO ROSES Date Received 02/16/2017 Time Call In 3:35 PM Received By DESIGNER Issued Date 02/16/2017 <input type="button" value="Complete"/> Date Scheduled 02/25/2017 WO Status Scheduled Order By/Inspect SALVADOR GRAY Proj Acct Num PJ420 Work to Perform MAINTAIN_BFP BFP Maintenance	Work Order Num 0 Old New Serial Num 78 78 Type RP Mfr Wilkins Model 975XL2MS Size 3/4" Permit Num <input type="text"/> Work Order Section <input type="text"/> Work Order Priority 0 1 2 3 4 Coliform Count <input type="text"/> #/100ml <input type="checkbox"/> Lead Pipes found in System <input type="checkbox"/> Contacted Customer
---	--

WO Source Complaint Inquiry Other:

Work Description Boiler Plate Text DEVICE HAS NO MANUFACTURERER TAG/PLATE.	Findings and Corrections Boiler Plate Text REPLACE TAG/PLATE OR BPD ASSEMBLY WHEN IT FAILS.	Charges <input type="text"/> Parts <input type="text"/> Total <input type="text"/>
--	---	---

Date Begin 02/16/2017 **Time In** **Work Done By** SALVADOR GRAY
Date Done **Time Out** **Meter Reading** **Date Read**

Line Items XC2 Picts Time Sheet New Print Cancel Save

Notes:

Charges

Are you going to charge?

XC2 Software - BFP : * Facility : 0007 : 1 of 1 Selected : WEB SERVER ON : 80 : WEB BFP Test

Work Order Entry Location Map **WO_Input_01_LG** Response Time Hrs ID No 11038106

Facility JOHNS GRILL Acct Number <input type="text"/> Meter # <input type="text"/> Service Address 63 ELLIS City SAN FRANCISCO Location LOCATED IN THE SOUTH GARDEN NEXT TO ROSES Date Received 02/16/2017 Time Call In 3:35 PM Received By DESIGNER Issued Date 02/16/2017 <input type="button" value="Complete"/> Date Scheduled 02/25/2017 WO Status Scheduled Order By/Inspect SALVADOR GRAY Proj Acct Num PJ420 Work to Perform MAINTAIN_BFP BFP Maintenance	Work Order Num <input type="text" value="0"/> <input type="button" value="Old"/> <input type="button" value="New"/> Serial Num 78 <input type="text" value="78"/> Type RP Mfr Wilkins Model 975XL2MS Size 3/4" Permit Num <input type="text"/> Work Order Section <input type="text"/> Work Order Priority <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 Coliform Count <input type="text"/> #/100ml <input type="checkbox"/> Lead Pipes found in System <input type="checkbox"/> Contacted Customer
---	---

WO Source Complaint Inquiry Other:

Work Description Boiler Plate Text DEVICE HAS NO MANUFACTURERER TAG/PLATE.	Findings and Corrections Boiler Plate Text REPLACE TAG/PLATE OR BPD ASSEMBLY WHEN IT FAILS.	Charges \$100.00 Parts <input type="text"/> Total \$100.00
--	---	---

Date Begin 02/16/2017 **Time In** **Work Done By** SALVADOR GRAY
Date Done **Time Out** **Meter Reading** **Date Read**

Line Items XC2 Picts Time Sheet New Print

Notes:

Dates

Start Date
Finish Date

XC2 Software - BFP : * Facility : 0007 : 1 of 1 Selected : WEB SERVER ON : 80 : WEB BFP Test

Work Order Entry Location Map **WO_Input_01_LG** Response Time Hrs ID No 11038106

Facility JOHNS GRILL Acct Number Meter # Service Address 63 ELLIS City SAN FRANCISCO Location LOCATED IN THE SOUTH GARDEN NEXT TO ROSES Date Received 02/16/2017 Time Call In 3:35 PM Received By DESIGNER Issued Date 02/16/2017 Complete Date Scheduled 02/25/2017 WO Status Complete Order By/Inspect SALVADOR GRAY Proj Acct Num PJ420 Work to Perform MAINTAIN_BFP BFP Maintenance	Work Order Num 0 Old New Serial Num 78 78 Type RP Mfr Wilkins Model 975XL2MS Size 3/4" Permit Num Work Order Section Work Order Priority 1 2 3 4 Coliform Count #/100ml <input type="checkbox"/> Lead Pipes found in System <input type="checkbox"/> Contacted Customer
--	--

WO Source Complaint Inquiry Other:

Work Description Boiler Plate Text DEVICE HAS NO MANUFACTURERER TAG/PLATE	Findings and Corrections Boiler Plate Text REPLACE TAG/PLATE OR BPD ASSEMBLY WHEN IT FAILS.	Charges \$100.00 Parts Total \$100.00
---	---	--

Date Begin 02/16/2017 **Time In** **Work Done By** SALVADOR GRAY
Date Done 02/16/2017 **Time Out** **Meter Reading** **Date Read**

Line Items XC2 Picts Time Sheet New Print < << >> > Cancel Save

Notes:

Complete?

Change Status Here

If Complete you can clicke the button

XC2 Software - BFP : * Facility : 0007 : 1 of 1 Selected : WEB SERVER ON : 80 : WEB BFP Test

Work Order Entry Location Map **WO_Input_01_LG** Response Time Hrs ID No 11038106

Facility JOHNS GRILL Acct Number <input type="text"/> Meter # <input type="text"/> Service Address 63 ELLIS City SAN FRANCISCO Location LOCATED IN THE SOUTH GARDEN NEXT TO ROSES Date Received 02/16/2017 Time Call In 3:35 PM Received By DESIGNER Issued Date 02/16/2017 Complete <input type="button"/> Date Scheduled 02/25/2017 WO Status Complete <input type="button"/> Order By/Inspect SALVADOR GRAY Proj Acct Num PJ420 Work to Perform MAINTAIN_BFP BFP Maintenance	Work Order Num 0 Old New Serial Num 78 78 Type RP Mfr Wilkins Model 975XL2MS Size 3/4" Permit Num <input type="text"/> Work Order Section <input type="text"/> Work Order Priority <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 Coliform Count <input type="text"/> #/100ml <input type="checkbox"/> Lead Pipes found in System <input type="checkbox"/> Contacted Customer
--	--

WO Source Complaint Inquiry Other:

Work Description Boiler Plate Text DEVICE HAS NO MANUFACTURERER TAG/PLATE.	Findings and Corrections Boiler Plate Text REPLACE TAG/PLATE OR BPD ASSEMBLY WHEN IT FAILS.	Charges \$100.00 Parts Total \$100.00
--	---	--

Date Begin 02/16/2017 **Time In** **Work Done By** SALVADOR GRAY
Date Done 02/16/2017 **Time Out** **Meter Reading** **Date Read**

Line Items XC2 Picts Time Sheet New Print Cancel Save

Notes:

Print Work Order

XC2 Software - BFP : * Facility : 0007 : 1 of 1 Selected : WEB SERVER ON : 80 : WEB BFP Test

Work Order Entry Location Map **WO_Input_01_LG** Response Time Hrs ID No 11038106

Facility JOHNS GRILL Acct Number <input type="text"/> Meter # <input type="text"/> Service Address 63 ELLIS City SAN FRANCISCO Location LOCATED IN THE SOUTH GARDEN NEXT TO ROSES Date Received 02/16/2017 Time Call In 3:35 PM Received By DESIGNER Issued Date 02/16/2017 <input type="button" value="Complete"/> Date Scheduled 02/25/2017 WO Status Scheduled <input type="button" value="v"/> Order By/Inspect SALVADOR GRAY <input type="button" value="v"/> Proj Acct Num PJ420 Work to Perform MAINTAIN_BFP <input type="button" value="v"/> BFP Maintenance	Work Order Num <input type="text" value="0"/> <input type="button" value="Old"/> <input type="button" value="New"/> Serial Num 78 <input type="text" value="78"/> Type <input type="text"/> RP <input type="button" value="v"/> Mfr <input type="text"/> Wilkins <input type="button" value="v"/> Model <input type="text"/> 975XL2MS <input type="button" value="v"/> Size <input type="text"/> 3/4" <input type="button" value="v"/> Permit Num <input type="text"/> Work Order Section <input type="text"/> Work Order Priority <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 Coliform Count <input type="text"/> #/100ml <input type="checkbox"/> Lead Pipes found in System <input type="checkbox"/> Contacted Customer
---	---

WO Source Complaint Inquiry Other:


Work Description Boiler Plate Text <input type="button" value="v"/> DEVICE HAS NO MANUFACTURERER TAG/PLATE.	Findings and Corrections Boiler Plate Text <input type="button" value="v"/> REPLACE TAG/PLATE OR BPD ASSEMBLY WHEN IT FAILS.	Charges \$100.00 Parts <input type="text"/> Total \$100.00
---	--	---

Date Begin 02/16/2017 **Time In**
Date Done **Time Out**

Work Done By SALVADOR GRAY
Meter Reading **Date Read**

Notes:

Work Order



WORK ORDER

City of Snoqualamish, WA
 Received by: DESIGNER

Contacted Customer

Date Printed: 02/16/17

Date Received: 02/16/2017

Time Received: 3:35 PM

Order Number: 0

Source: Complaint Inquiry Other Inquiry

Acct Number: _____ schedule code: _____

Service Address: 63 ELLIS
 SAN FRANCISCO Location ID: _____

Addr. 2: _____ Map Page: _____

Customer Name: JOHN S GRILL

Contact Phone: _____ Protection Type: Containment

Device Location: LOCATED IN THE SOUTH GARDEN NEXT TO ROSES

Perform Action: BFP Maintenance Qty: _____ Permit Number: _____

Job Account #: PJ420 Hazard Type: _____

Description Inspector: SALVADOR GRAY

DEVICE HAS NO MANUFACTURERER TAG/PLATE.

Device Information

Serial Num 78

Type RP

Mfr Wilkins

Model 975XL2MS

Size 3/4"

Meter Info	Meter Number	Meter Size	Reading	Date Read	Read by
Existing Meter					
New Meter					

Findings and Corrections Lead Pipes found In System Caliform Count: _____

REPLACE TAG/PLATE OR BPD ASSEMBLY WHEN IT FAILS.

Pipe Installation Size: _____ Feet: _____

Work Done By: SALVADOR GRAY

Begin Date: 02/16/2017 Done Date: 02/16/2017

Contacted Customer ? Work Order Complete ?

Labor Information

Begin Time: _____

Done Time: _____

Actual Hrs: _____

Crew Size: _____

Tot. Labor Hrs: _____

H2O Discharge/Leakage

Rate (GPM) _____

Duration: _____

Notes:

[Print](#)

XC2 Software - BFP : * Facility : 0007 : 1 of 1 Selected : WEB SERVER ON : 80 : WEB BFP Test

Work Order Entry Location Map **WO_Input_01_LG** Response Time Hrs ID No 11038106

Facility JOHNS GRILL Acct Number <input type="text"/> Meter # <input type="text"/> Service Address 63 ELLIS City SAN FRANCISCO Location LOCATED IN THE SOUTH GARDEN NEXT TO ROSES Date Received 02/16/2017 Time Call In 3:35 PM Received By DESIGNER Issued Date 02/16/2017 <input type="button" value="Complete"/> Date Scheduled 02/25/2017 WO Status Complete Order By/Inspect SALVADOR GRAY Proj Acct Num PJ420 Work to Perform MAINTAIN_BFP BFP Maintenance	Work Order Num 0 Old New Serial Num 78 78 Type RP Mfr Wilkins Model 975XL2MS Size 3/4" Permit Num <input type="text"/> Work Order Section <input type="text"/> Work Order Priority 1 2 3 4 Coliform Count <input type="text"/> #/100ml <input type="checkbox"/> Lead Pipes found in System <input type="checkbox"/> Contacted Customer
--	--

WO Source Complaint Inquiry Other:

Work Description Boiler Plate Text DEVICE HAS NO MANUFACTURERER TAG/PLATE.	Findings and Corrections Boiler Plate Text REPLACE TAG/PLATE OR BPD ASSEMBLY WHEN IT FAILS.	Charges \$100.00 Parts <input type="text"/> Total \$100.00
--	---	---

Date Begin 02/16/2017 **Time In**
Date Done 02/16/2017 **Time Out**
Work Done By SALVADOR GRAY
Meter Reading **Date Read**

Line Items XC2 Picts Time Sheet New Print

Notes:



XC2 Software Knowledge Base



Auto Generated Work Orders

KB Asset ID: 3528

When editing or creating new backflow records, XC2 will display a dialog prompting for a response from you.

Your response will determine if a Work Order is generated and thus counted on reports like the year end compliance reports.

Creating a Work Order For Replacing a Device

Open an assembly record.

Either edit the device information

Or

Click the Replace button

XC2 Software - BFP: Mex Imports : Location ID: : DC: Facility ID: 150: 1 of 1 Selected

Acct/Address Info History Comments Custom Fields

Service Address Info Mailing Addresses Owner Addresses Property Manager [r]

Facility Address Info XC2 Facility ID No: 150 Assembly ID No: 2000617

Facility Name: Mex Imports
 Facility Name 2:
 Service Addr.: 6471 S Chant CT
 Addr. 2:
 City ST Zip: Snoqualamish WA Zip 98215
 State: WA Zip: 98215

Facility Contact Info Email Notices

Contact Name: Felton Last: Torres
 Position:
 Cell: (696) 234-6254
 Phone: (696) 234-6148 Ext: #2: (696) 234-6254
 EMail Address:
 H2O_System: Lennon River Water

Location ID: a ID 1:
 Meter Acct Num: 7280-000 Old Customer Num:
 Meter #: UD Date 5:
 Sz: UD Date 6:
 Service Type: Commercial Haz. Level:
 Hazard Type: Hydraulic Equipment
 Equip Location:
 Show Minimum Fields

Facility Area: No Facility Areas Entered Pressure Zone:
 Location Floor: Location Room:
 Hazard Contaminant: Flow GPM: 0
 Equipment Fixture Type: Line PSI: 0

Enter Test Send Notice Work Order

Type: DC Assembly List
 Size: 1" By Pass
 Mfr: Febco No Images
 Model: 805Y No Site Map
 Serial Num: 2000617
 Status: Installed Cnt. Y

Next Test Due: 02/28/2014 Mo. 2
 Frequency: 12 Months
 Last/Dflt Tester: Vincente Perry View
 Last Test Date: 12/10/2010 PASS
 Test Form Print Date:

Inst/Replace By

Install Date: 01/06/2008 Abv. Grade: 0
 Install Due:
 Replacement Due Date:
 Inst/Replace Date: 01/06/2008 Replace
 Permit Num:
 Schedule Code: 12-Dec
 Protection Type: Isolation

Inactive Back Pressure
 Cont. Pressure
 Back Siphonage
 Impropr. Appl
 Impropr. Install

Pictures/Site M... Google Ma... GPS Info Meter Info New BFP Record Search Report/Print Cancel Save

Notes:

If You Click The Replace Button or Enter A Date In The Replace Date Field

The Installation/Replacement entry screen opens

- Enter your device Changes
- Enter Date of Replacement
- Enter Personnel Information
- Select the Replacement Option

Click OK

Installation Replacement Information

Installation/Replacement Information - Please Confirm		
Equipment Information		
	Existing Info	New Info
Type	DC	DC
Size	0100	1"
Mfr	FEBCO	Febco
Model	805Y	805Y
Serial Num	2000617	2000617
Location		
Status	Installed	
Inst/Replace By		
Inst/Replace Date	12/29/2016	
Charges		
Parts		
Total		
		<input type="radio"/> New Installation
		<input checked="" type="radio"/> Replacement
		<input type="radio"/> Removal

Install_Replace_Info_01 Cancel OK

Notes:

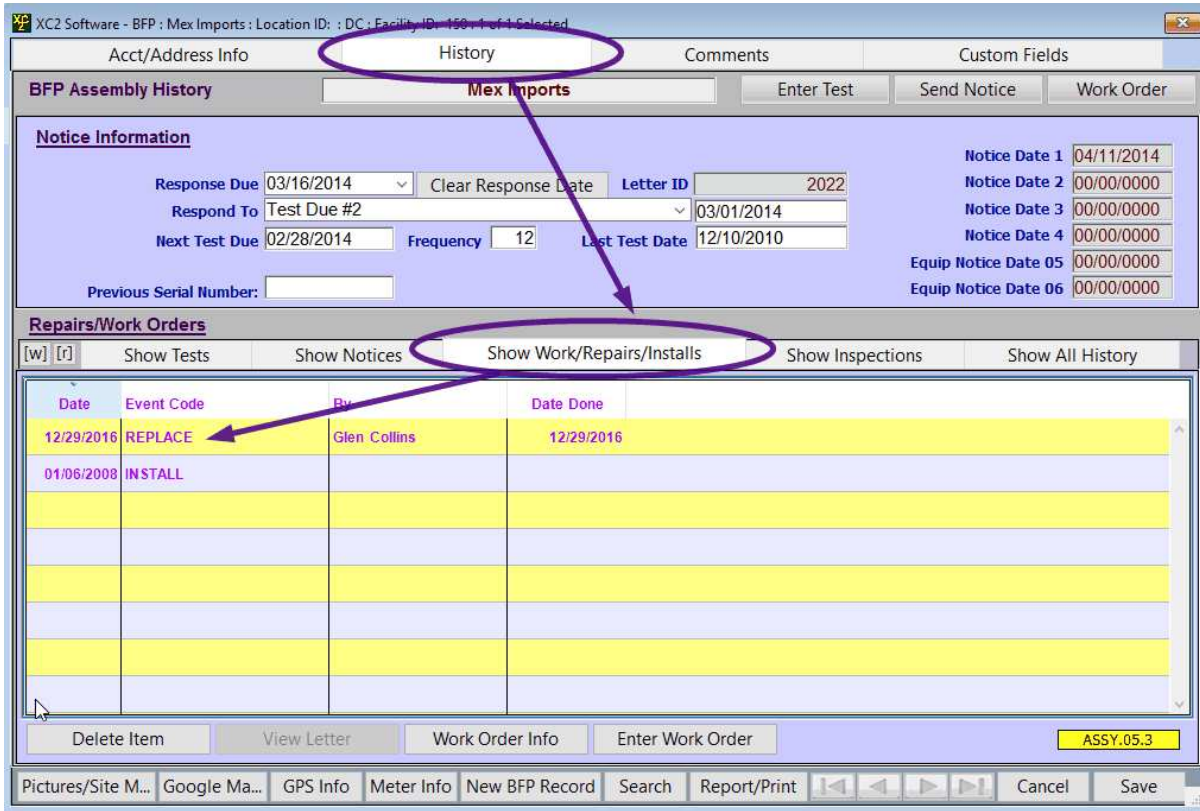
The Work Order Was Created

In the assembly record

Click the History tab

Click Show Work/Repairs/Installs tab

Here you will find the work order for the replacement information change you made.



Notes:



Manually Creating A New Work Order

KB Asset ID: 3529

Creating a Work Order from an assembly record

Open an Assembly Record

Click the Work Order button

The screenshot shows the 'XC2 Software - BFP: Mex Imports' window. The 'Work Order' button is highlighted with a red arrow. The interface is divided into several sections:

- Facility Address Info:** Facility Name: Mex Imports, Service Addr: 6471 S Chant CT, City: Snoqualamish, State: WA, Zip: 98215.
- Facility Contact Info:** Contact Name: Felton, Last: Torres, Cell: (696) 234-6254.
- Location ID:** Meter Acct Num: 7280-000, Old Customer Num: [blank], UD Date 5: [blank], UD Date 6: [blank].
- Service Type:** Commercial, Hazard Type: Hydraulic Equipment.
- Inst/Replace By:** Glen Collins, Install Date: 01/06/2008, Abv. Grade: 0.
- Inst/Replace Date:** 12/29/2016, Replace button.
- Test Status:** Next Test Due: 02/28/2014, Frequency: 12 Months, Last Test Date: 12/10/2010 (PASS).
- Protection Type:** Isolation.

Notes:

Creating The Work Order

Enter:

- Date Recieved
- Date Scheduled (if applicable)
- Ordered By/Inspectors Name
- What work to be done

You can also type in any comments or use the Boiler plate option to insert work order information.

NOTE: See Boiler Plates under Lookup Resource Lists

Notes:



XC2 Software Knowledge Base



Creating Work Order Types

KB Asset ID: 3530

When you create a new work order, the type of work being performed is required.

Here you can create new work order job descriptions

Open the Lookup/Resource List

Click Activity Type

Click Select

The screenshot shows the XC2 Software interface for 'City of Snoqualamish, WA'. A dialog box titled 'Select a Setup List To View' is open, displaying a list of setup lists. The 'Activity Type' entry is selected. A purple arrow points from the 'Lookup-Resource Lists' option in the left sidebar to the 'Activity Type' entry. The 'Select' button at the bottom right of the dialog is circled in purple.

Setup Lists	ID
Activity Type	010
BFP Hazard Type	025
Boiler Plate Text	066
Business Category Code	029
Choice List Manager	003
Compliance Rpt Category	170
Equipment Model	002
Equipment Model Size	028
Equipment Size	014
Equipment Type	015
Fixture Type	090
H2O Organization	021
Line Item Codes	074
Manufacturers	022
Schedule Code	033

Notes:

Click Add

The screenshot shows the XC2 Software interface for 'City of Snoqualamish, WA'. The window title is 'XC2 Software - BFP : City of Snoqualamish, WA: * Activity Type: 37 of 38 Records : Multi-Line'. The interface includes a top toolbar with buttons for 'Add', 'Delete', 'Find', 'Sort', 'Show All', 'Export', 'Saved Search', and 'Report'. Below the toolbar is a 'Main Page Functions' section with a search bar for 'Activity Type' and '37 of 38 Records'. On the left, there are two vertical panels: 'Select Special Function' and 'Favorite Tasks'. The main area is a table with columns: '#', 'Event Code', 'Group Type', 'Sub Type', 'Test Type', and 'Description'. The table contains 17 rows of data. At the bottom, there are buttons for 'Enter Survey', 'Enter Test', and 'Exit XC2'. A purple arrow points from the 'Add' button in the toolbar to the first row of the table.

#	Event Code	Group Type	Sub Type	Test Type	Description
1	TK_ACCURACY	Certification	Accuracy		Test Kit Accuracy
2	TK_CALIBRATION	Certification	Calibration		Test Kit Calibration
3	SURVEY	Survey	Exist		Survey/Inspection
4	EXT_SURVEY	Survey	Exist		Drive by Survey
5	PARTIAL_SURVEY	Survey	Exist		Partial Survey
6	CSI_Exist	Survey	Exist		Customer Service Inspe
7	FAIL	Test	FAIL		Fail Test
8	FAIL/PASS	Test	FAIL/PASS		Failed Initial/Passed Fin
9	INC	Test	INC		Incomplete Test
10	INSPECT	Work Order	Inspection		Inspection
11	INSTALL	Work Order	Installation		Install Assembly
12	LTR_CUSTOM_1	Letter	Letter-Custom		Custom Letter #1
13	LTR_CUSTOM_2	Letter	Letter-Custom		Custom Letter #2
14	LTR_EMAIL_BFP	Letter	Letter-EMail		Letter - Other
15	LTR_OTHER	Letter	Letter-Other		Letter - Other
16	WKORDER	Letter	Letter-Other		Work Order Form
17	WKORDER2	Letter	Letter-Other		Work Order

Notes:

Create Work Order Job Description

Enter Work Order Name and Description

Specify that Category Work Order

If the work does not fit the standard categories listed, select Other.

Click Save

The screenshot shows the 'Event Type' configuration window. Key elements include:

- Activity Code:** SHUT OFF
- Description:** Shut Water Off To Unit
- Test Type:** Includes options like Pass, Fail, Annual, Initial Install, After Repair, Replacement, Spot Check, etc.
- Frequency:** Includes options like Daily, Weekly, Bi-Weekly, Semi-Monthly, Monthly, Bi-Monthly, Quarterly, Semi-Annual, Annual, Bi-Annual, 3 Year, 5 Year.
- Work Order:** This radio button is selected and circled in red.
- Other:** This radio button is also selected and circled in red, with a text box containing 'Shut Off'.
- Buttons:** Duplicate, New Record, Search, Report/Print, Cancel, Save.

Notes:

New Work Oder Created

Your new work order decription is now available for selection

Work Order Entry

Location Map **WO_Input_01_LG** Response Time Days ID No

Facility Mex Imports
Acct Number 7280-000 Meter #
Service Address 6471 S Chant CT City Snoqualamish
Location
Date Received 12/29/2016 Time Call In 2:25 PM
Received By Backflow Tester
Issued Date Complete
Date Scheduled WO Status Initiated
Order By/Inspect
Proj Acct Num
Work to Perform SHUT OFF
WO Source Complaint Inquiry Other:

Work Order Num 0
Old New
Serial Num 545484 545484
Type DC
Mfr Ames
Model 2000-DCA
Size 1"
Permit Num
Work Order Section
Work Order Priority 1 2 3 4
Coliform Count #/100ml
 Lead Pipes found in System
 Contacted Customer

Work Description Boiler Plate Text Findings and Corrections Boiler Plate Text
Charges
Parts
Total

Date Begin 12/29/2016 Time In Work Done By
Date Done Time Out Meter Reading Date Read

Line Items XC2 Picts Time Sheet New Print Cancel Save

Notes:



XC2 User Manual

More Printing Options

- **Printing Labels and Envelopes**
- **Printing Blank Test Forms**
- **Printing Test Forms with Info from Assembly List**
- **Printing Test Report with Info from Facility List**
- **Printing Last Test Report From Assembly List**
- **Printing Last Test Report from Facility List**
- **Print Current Active Certified Testers List**
- **Print Blank Survey Form**



XC2 Software Knowledge Base



How to Print Labels and Envelopes

KB Asset ID: 2523

Page describes how to print Labels and Envelopes from a list of Facility Records

Select List of Facilities

Labels and Envelopes can be printed from a list of either Facilities or Assemblies. Here I will walk you through how to print Labels and Envelopes from a list of Facilities.

- Click the Facility Button to access your list of Facilities.
- From the Facility list, select the group of Facilities you would like to print labels or envelopes for.
- After you have selected your list of Facilities, organize the list in the order you would like them to print.
- Click the Report button when you are ready to continue.

XC2 Software - BFP : City of Snoqualamish, WA: * Facility: 81 of 81 Records : Multi-Line

User Options Add Delete Find Sort Show All Export Saved Search Report

• Reports Facility 81 of 81 Records Find: Facility Name

#	Facility Name	Addr (#)	Street	Site Qty	hed Co	Next Survey
10	MEX IMPORTS - CHANGE	6471	CHANT	2	12-Dec	01/0
11	TAFOYA ELECTRIC CHANGE	1795	CHURCH VIEW	1	01-Jan	08/0
12	TAYLORS LIQUORS CHANGE	445	PERKINS	1	01-Jan	07/0
13	NORTH STAR LIQUOR -----CHANGE	7698	HUNTERS BND -----CHANGE	1	04-Apr	
14	LA SALLE PARTNERS	5622	STERLING GLEN		02-Feb	03/0
15	SCREENPLAY VIDEO CENTERS	7805	ARCHER	1	11-Nov	
16	WILLIE'S PLACE	8488	STRATHMOORE	1	11-Nov	02/0
17	GRAPHIC DESIGNEES	9044	KELSEY	1	12-Dec	11/2
18	WORLD COMPUTER CORPORATION - CHANC	7816	YANKEE	1	02-Feb	11/0
19	SPECIALTY SYSTEMS	785	WALLSEND	1	05-May	05/2
20	MERCER WILLIAM M INCORPORATED	5707	CHATHAM	1	01-Jan	02/2
21	SEARS J L & ASSOCIATES REAL ESTATE	7323	FAIRWAY	1	08-Aug	
22	LAMAR VENTURES	2941	ADARA	1	12-Dec	03/0
23	MIDWEST SALES CO	4557	FRANK		02-Feb	04/2
24	A FLAG HOUSE	1583	KIM	2	09-Sep	04/1
25	RILEY INCOME TAX SERVICE	1710	LIBERTY	1	01-Jan	04/2

Selection ... Filter On Filter Facilities w/out Backflow Send Notice Enter Survey Enter Test Exit XC2

Notes:

Confirm Action

You may receive a confirmation on how many records you would like to print.
Select one of the options:

- Apply to All
- One Only
- Cancel

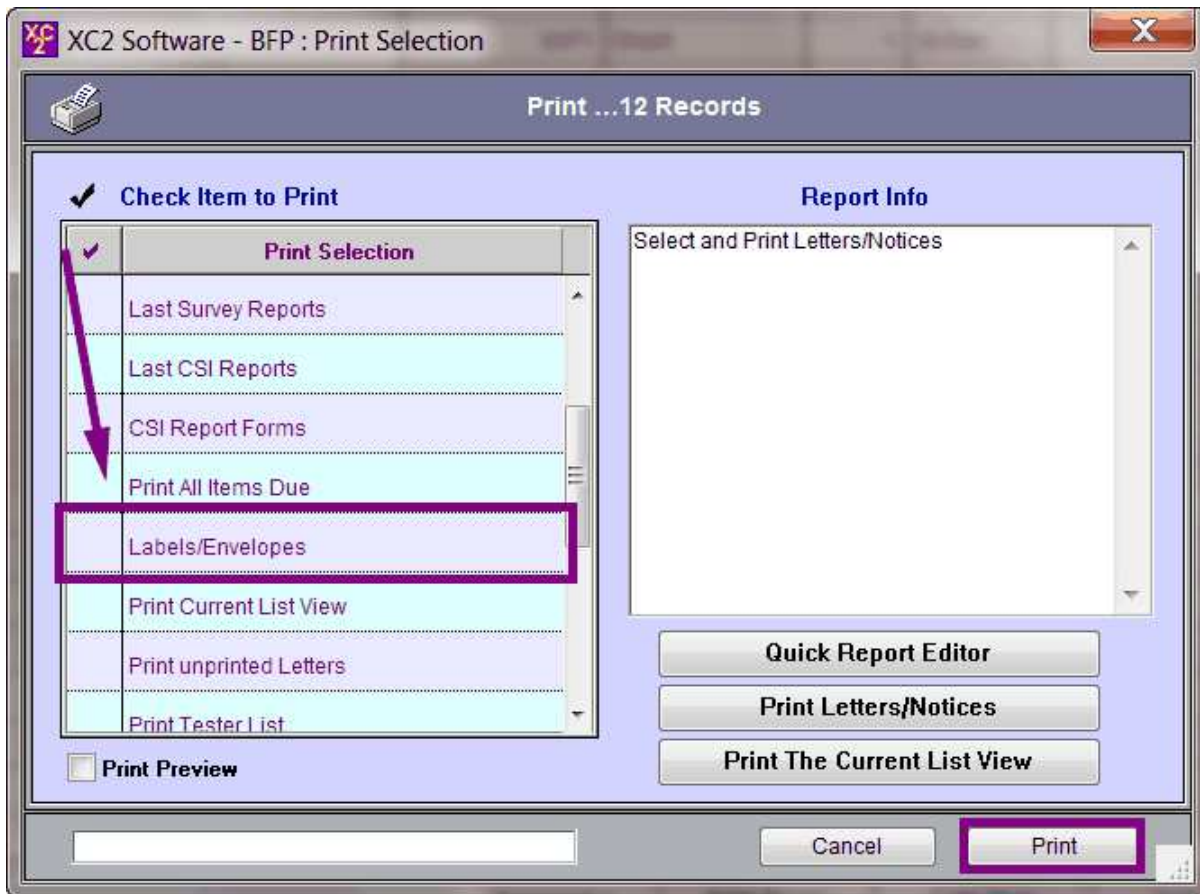


Notes:

Print Selection

In Print Selection Options

- Select Labels/Envelopes
- Click Print

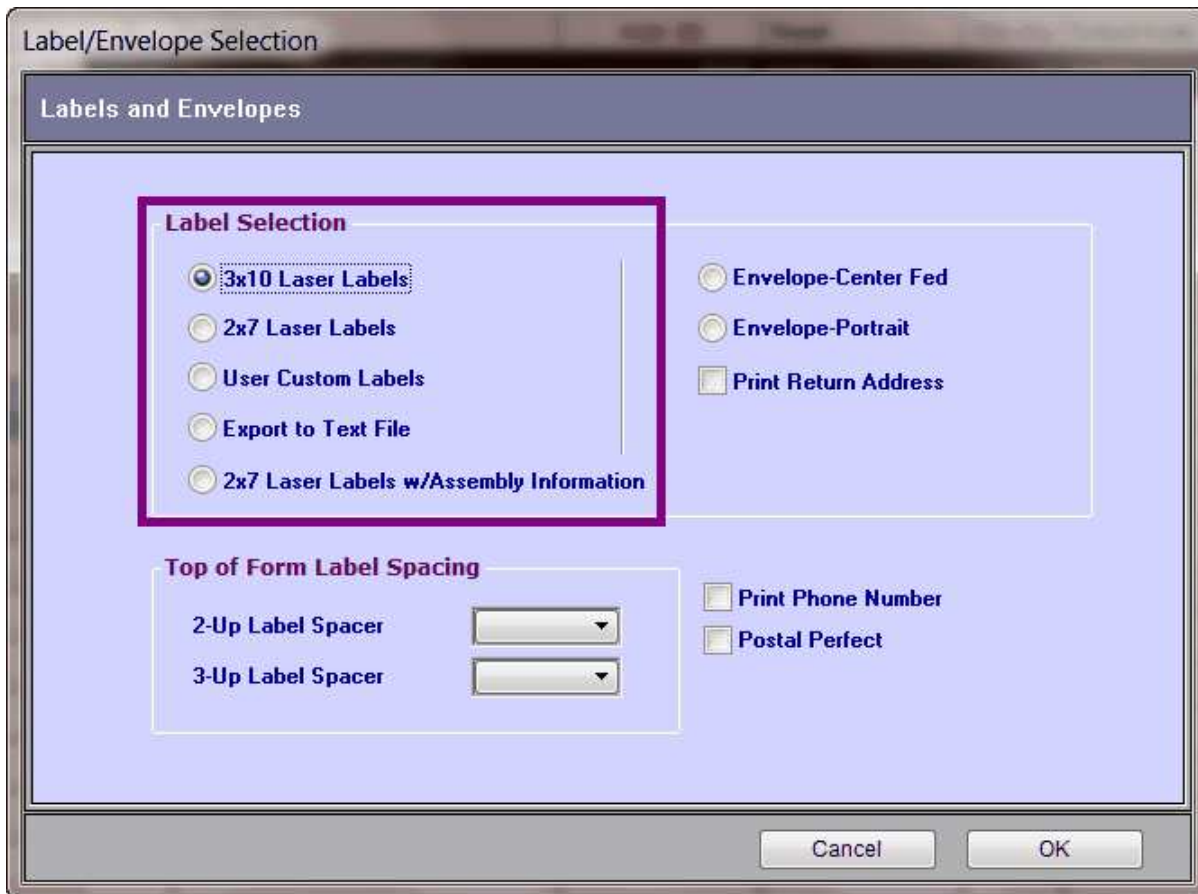


Notes:

Label Selection: Printing Labels

Next you need to select what type of labels you would like to print.
Choose

- 3 x 10 Labels
- 2 x 7 Labels
- User Custom Labels
- Export Labels to a Text File
- Print 2x 7 Labels with Assembly Information

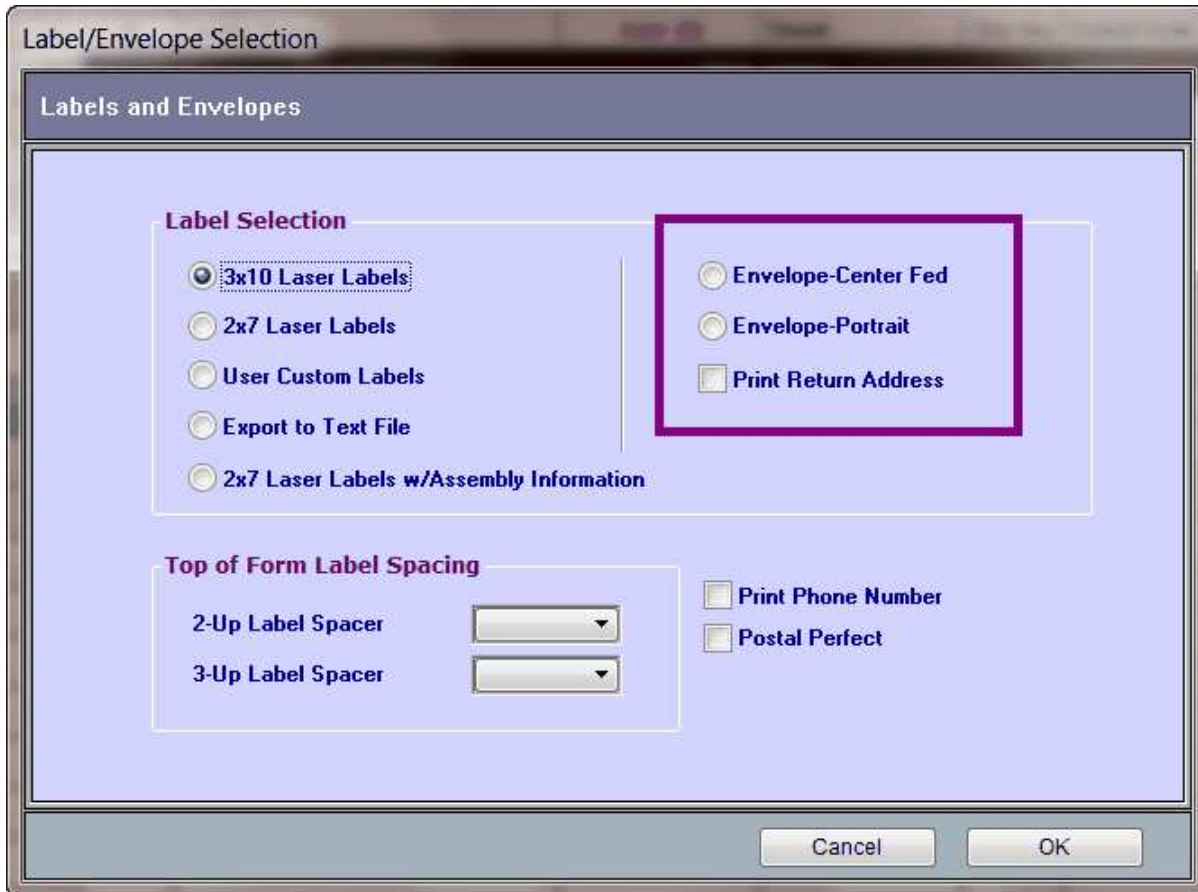


Notes:

Label Selection: Envelopes

If you would prefer to print on Envelopes instead of Labels, choose how you would like Envelopes to print.

- Envelope - Center Fed: Choose this option if you will be center-feeding manually or using a center-feeding envelope tray.
- Envelope - Portrait: Choose this option if you are using a portrait envelope.
- If you would like to print a return address on your envelope, check the box Print Return Address.



Notes:

Label Spacing

If you need to adjust the address placement on the labels, you may need to change the spacing.

Under "Top of Form Label Spacing"

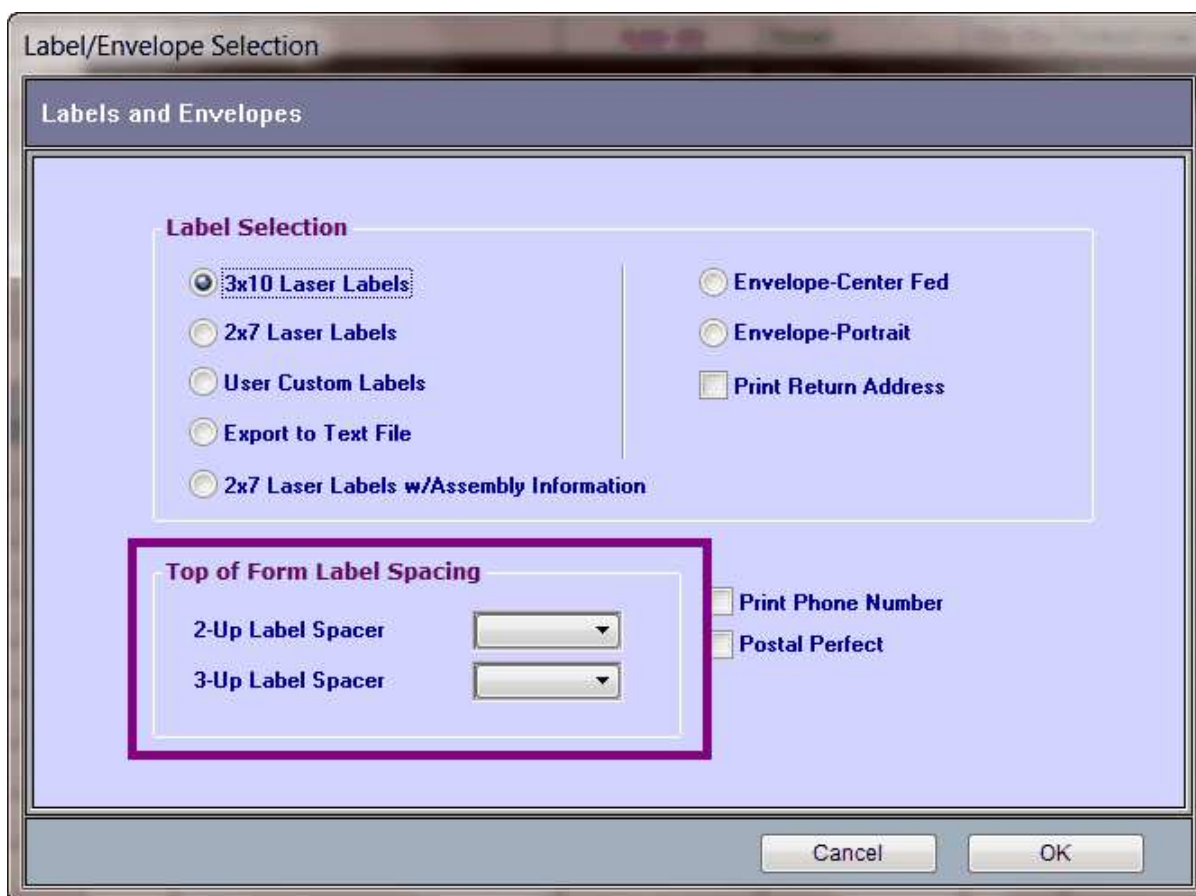
Click the pulldown menu and select the amount of space you need between the top of the page and the first line of the address.

If the labels you are using are placed in two columns, use 2-up.

If the labels you are using are placed in three columns, use 3-up.

You may also choose to print a phone number on the label.

When you are done making your selection click OK, then Print.



Notes:

Example

Here is an example of what you can expect to print if you are printing labels.

Note:

By default, XC2 will print whatever is in the Mailing Record unless you have specified a different location.

Kim Cox Rainbow Rebuilders 123 West Median/26-632-440-#21 Snoqualamish, WA 98215	Tyrell Morris Lamar Ventures 2941 S A dara Dr Snoqualamish, WA 98215	Wiley Stewart Screenplay Video Centers 7805 S Archer Ln Snoqualamish, WA 98215	0
Vern Thompson Ollie's Roundup 9451 S Banbridge Ln Snoqualamish, WA 98215	Jerrell Hill 29th Ave Liquor 4880 N Beech Ridge Dr Snoqualamish, WA 98215	Lonnie Jones Hospital Shared Services Warehouse 5898 Buena Park Dr	0
Aron Wilson Hospitality Group Inc The 429 Cali Glen Ln	Israel King Steward Painting & Restoration 3727 W Carter's Corner Rd Snoqualamish, WA 98215	Jamal Moore Monkey Tree 8668 N Pinehurst Pte Snoqualamish, WA 98215	0
Felton Torres Mex Imports 6471 S Chant CT Snoqualamish, WA 98215	Rashad Martin Mercer William M Incorporated 5707 S Chatham Dr Snoqualamish, WA 98215	Barry Young Tafoya Electric 1795 S Church View CT Snoqualamish, WA 98215	0
Ezekiel Bryant Rains-Flo Packings 5102 E Clark-Shaw Rd Snoqualamish, WA 98215	Jeremy Kelly Steele Elementary School 6916 W Crooked Elm CT Snoqualamish, WA 98215	Chad Howard Weber Management Company 6679 S Cross Creek CT Snoqualamish, WA 98215	0
Anibal Bailey Lingerie Etc 1760 S Cuyuqa Dr Snoqualamish, WA 98215	Ariel Carter T-M Service CO 1328 S Dogwood Ln Snoqualamish, WA 98215	Roman Perez Sears J.L. & Associates Real Estate 7323 S Fairway Rd Snoqualamish, WA 98215	0
Eduardo Griffin New Again Auto Re-Con Systems 881 S Fawn Meadow CT Snoqualamish, WA 98215	Arnold Richardson National Certification Board Periooperativ 4604 W Moliana CT Snoqualamish, WA 98215	Horace Zaquutz Hernandez A&I Rims 5750 N Colleton Dr Snoqualamish, WA 98215	0
Dusty Kelly Midwest Sales CO 4557 S Frank St Snoqualamish, WA 98215	Harley Phillips National Lender Services Inc 5450 N Grace CT Snoqualamish, WA 98215	Norberto Bell So Fine Limousine Service 3947 W Greenlawn Dr Snoqualamish, WA 98215	0
Eldon Roberts Seniors in Community Living Inc 9095 S Greyson Dr Snoqualamish, WA 98215	Warren Alexander Opus One Designs 3166 S Guard-Well St Snoqualamish, WA 98215	Patrick Stewart Resolution Trust Corp 1905 S Hillyer Ave Snoqualamish, WA 98215	0
Euqene Ward Polymedica Industries Inc 2672 N Homsea Dr Snoqualamish, WA 98215	Darrell Turner North Star Liquor 7698 E Hunters Bnd Snoqualamish, WA 98215	Bernardo Collins Peck Doran P C 1556 N Inverness St Snoqualamish, WA 98215	0

Notes:



XC2 Software Knowledge Base



How to Print Blank Test Forms With No Information

KB Asset ID: 3386

This page describes how to print completely blank test forms without customer information

Blank Test Form

You can print blank test forms very easily out of XC2

Here is a completely blank form, with no customer information printed

CITY OF SNOQUALAMISH

City of Snoqualamish, WA

Assembly ID		Facility Name		Test Report Due:	
Acot Number		Meter #		Schedule Code	
Service Address				Assembly Info (Replacement/Correction)	
Equip Location				SN <input type="checkbox"/>	
Location ID		Protection Type		Mfr <input type="checkbox"/>	
Contact Name		Ph		Type <input type="checkbox"/>	
Map Page		#2		Size <input type="checkbox"/>	
				Model <input type="checkbox"/>	
				Install Date	
				Permit Num	
<input type="checkbox"/> Confinement		<input type="checkbox"/> Freeze Protection		Hazard Type	
				Haz. Level	

Line pressure at time of test:		REPORT OF TEST RESULTS				<input type="checkbox"/> Approved BFP	
	Check Valve #1	Check Valve #2	Relief Valve	PVB/SVB	Shut Off Valves		
Initial Test	<input type="checkbox"/> Held at _____ PSID	<input type="checkbox"/> Held at _____ PSID	<input type="checkbox"/> Opened at _____ PSID	<input type="checkbox"/> Air Inlet Opened at _____ PSID			
	<input type="checkbox"/> Closed Tight	<input type="checkbox"/> Closed Tight	<input type="checkbox"/> Did Not Open	Opened Fully Y <input type="checkbox"/> N <input type="checkbox"/>	Closed Tight <input type="checkbox"/> #1 <input type="checkbox"/> #2		
Pass	<input type="checkbox"/> Leaked	<input type="checkbox"/> Leaked		<input type="checkbox"/> Check Held at _____ PSID	Leaked <input type="checkbox"/> <input type="checkbox"/>		
Fail				<input type="checkbox"/> Leaked			
R E P A I R	<input type="checkbox"/> CLEANED <input type="checkbox"/> REPLACED	<input type="checkbox"/> CLEANED <input type="checkbox"/> REPLACED	<input type="checkbox"/> CLEANED <input type="checkbox"/> REPLACED	<input type="checkbox"/> CLEANED <input type="checkbox"/> REPLACED	CLEANED <input type="checkbox"/> <input type="checkbox"/> REPLACED <input type="checkbox"/> <input type="checkbox"/> REPAIR <input type="checkbox"/> <input type="checkbox"/>		
	<input type="checkbox"/> Disc	<input type="checkbox"/> Disc	<input type="checkbox"/> Disc	<input type="checkbox"/> Air Inlet Disc			
	<input type="checkbox"/> Spring	<input type="checkbox"/> Spring	<input type="checkbox"/> Spring	<input type="checkbox"/> Air Inlet Spring			
	<input type="checkbox"/> Guide	<input type="checkbox"/> Guide	<input type="checkbox"/> Diaphragm	<input type="checkbox"/> Check Disc			
	<input type="checkbox"/> Seat	<input type="checkbox"/> Seat	<input type="checkbox"/> Seat	<input type="checkbox"/> Check Spring			
	<input type="checkbox"/> O-Ring(s)	<input type="checkbox"/> O-Ring(s)	<input type="checkbox"/> O-Ring(s)	<input type="checkbox"/> Float			
	<input type="checkbox"/> Module	<input type="checkbox"/> Module	<input type="checkbox"/> Module	<input type="checkbox"/> Diaphragm			
	<input type="checkbox"/> Rubber Kit	<input type="checkbox"/> Rubber Kit	<input type="checkbox"/> Rubber Kit	<input type="checkbox"/> Rubber Kit			
Other/Notes:							
Final Test	<input type="checkbox"/> _____ PSID	<input type="checkbox"/> _____ PSID	<input type="checkbox"/> Opened at _____ PSID	Opened Fully Y <input type="checkbox"/> N <input type="checkbox"/>	Air Inlet _____ PSID		
	<input type="checkbox"/> Closed Tight	<input type="checkbox"/> Closed Tight		<input type="checkbox"/> CK Valve _____ PSID	Closed Tight <input type="checkbox"/> <input type="checkbox"/>		
						Pass <input type="checkbox"/>	

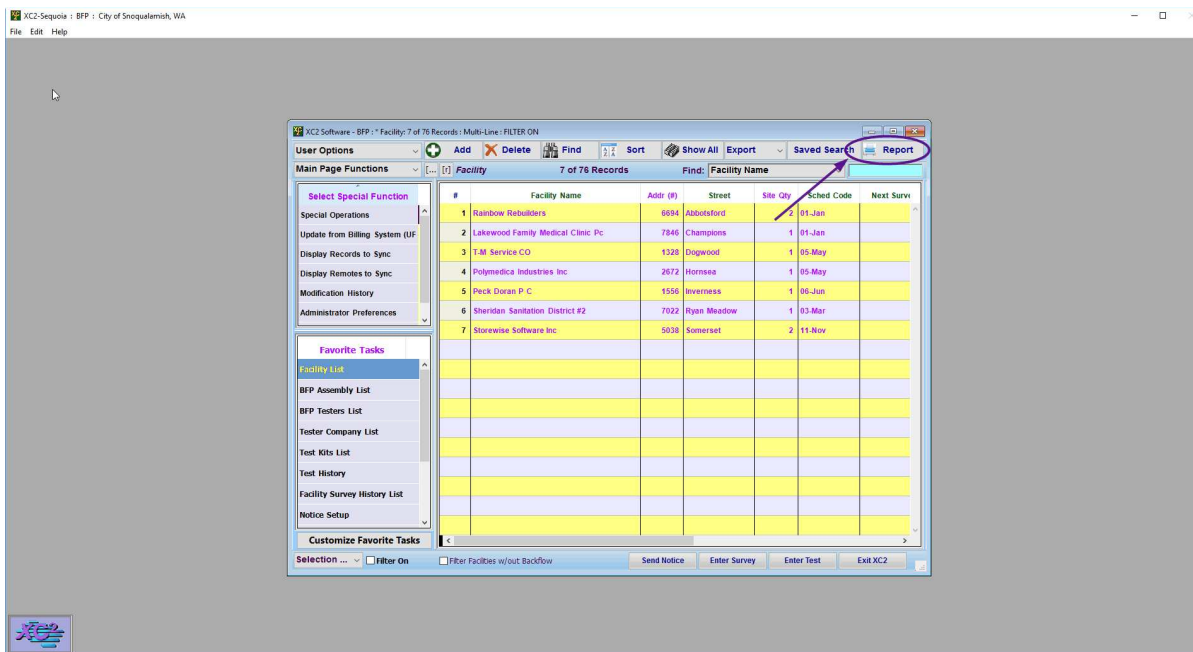
THE ABOVE REPORT IS CERTIFIED TO BE TRUE:

Initial Test By	Certificate	Test Date:	Gauge Num	Company	Phone
Final Test By					
Repair By					

Report/Print

To print the form from any list view

Click the Report button



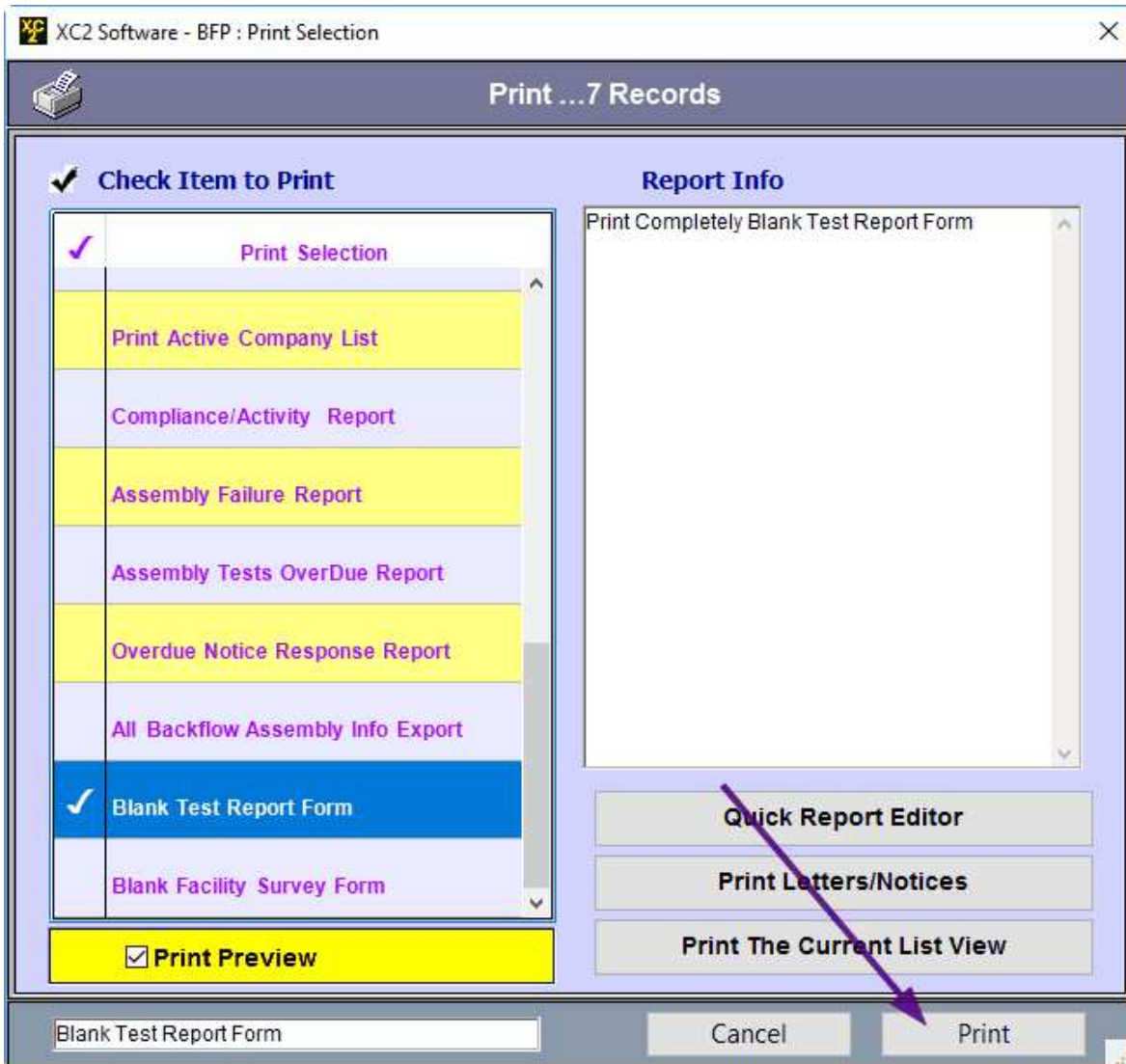
Notes:

Scroll through list

Scroll through the list until you find,

Blank Test Report Form

Click Print

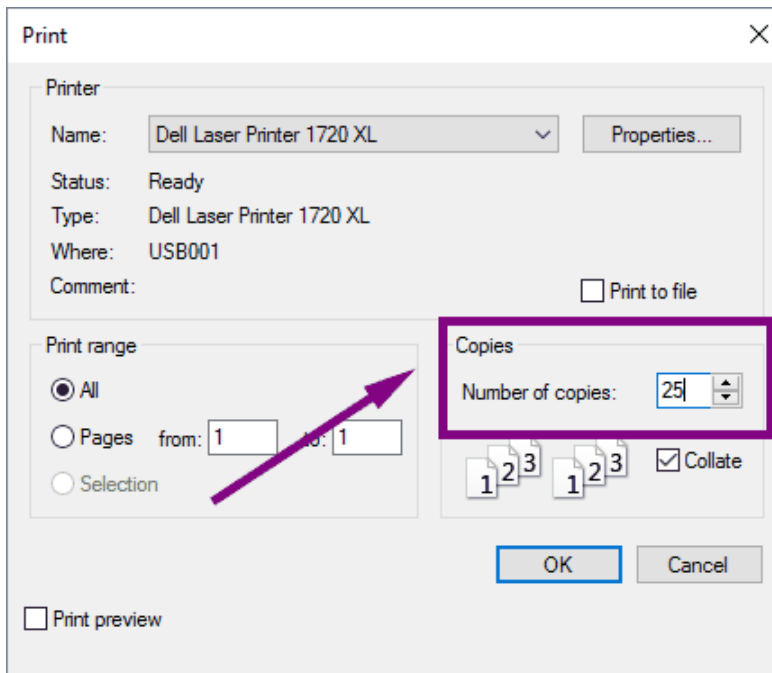


Notes:

Select Number of Copies

Before printing, choose the number of copies you would like to print.


Confirm and Print



Notes:

Blank Test Form

The blank test form will print



CITY OF SNOQUALAMISH

City of Snoqualamish, WA

Assembly ID		Facility Name		Test Report Due:		
Acct Number		Meter #		Schedule Code		
Service Address				Assembly Info (Replacement/Correction)		
Equip Location				SN	<input type="checkbox"/>	
Location ID		Protection Type		Mfr	<input type="checkbox"/>	
Contact Name		Ph		Type	<input type="checkbox"/>	
Map Page		#2		Size	<input type="checkbox"/>	
				Model	<input type="checkbox"/>	
				Install Date		
				Permit Num		
<input type="checkbox"/> Confinement		<input type="checkbox"/> Freeze Protection		Hazard Type		
				Haz. Level		
Line pressure at time of test: REPORT OF TEST RESULTS <input type="checkbox"/> Approved BFP						
	Check Valve #1	Check Valve #2	Relief Valve	PVB/SVB	Shut Off Valves	
Initial Test	<input type="checkbox"/> Held at _____ PSID	<input type="checkbox"/> Held at _____ PSID	<input type="checkbox"/> Opened at _____ PSID	<input type="checkbox"/> Air Inlet Opened at _____ PSID		
	<input type="checkbox"/> Closed Tight	<input type="checkbox"/> Closed Tight		Opened Fully Y <input type="checkbox"/> N <input type="checkbox"/>	Closed Tight	<input type="checkbox"/> #1 <input type="checkbox"/> #2
Pass	<input type="checkbox"/> Leaked	<input type="checkbox"/> Leaked	<input type="checkbox"/> Did Not Open	<input type="checkbox"/> Check Held at _____ PSID	Leaked	<input type="checkbox"/>
				<input type="checkbox"/> Leaked		<input type="checkbox"/>
R E P A I R	<input type="checkbox"/> CLEANED <input type="checkbox"/> REPLACED	<input type="checkbox"/> CLEANED <input type="checkbox"/> REPLACED	<input type="checkbox"/> CLEANED <input type="checkbox"/> REPLACED	<input type="checkbox"/> CLEANED <input type="checkbox"/> REPLACED	CLEANED	<input type="checkbox"/>
	<input type="checkbox"/> Disc	<input type="checkbox"/> Disc	<input type="checkbox"/> Disc	<input type="checkbox"/> Air Inlet Disc	REPLACED	<input type="checkbox"/>
	<input type="checkbox"/> Spring	<input type="checkbox"/> Spring	<input type="checkbox"/> Spring	<input type="checkbox"/> Air Inlet Spring	REPAIR	<input type="checkbox"/>
	<input type="checkbox"/> Guide	<input type="checkbox"/> Guide	<input type="checkbox"/> Diaphragm	<input type="checkbox"/> Check Disc		<input type="checkbox"/>
	<input type="checkbox"/> Seat	<input type="checkbox"/> Seat	<input type="checkbox"/> Seat	<input type="checkbox"/> Check Spring		<input type="checkbox"/>
	<input type="checkbox"/> O-Ring(s)	<input type="checkbox"/> O-Ring(s)	<input type="checkbox"/> O-Ring(s)	<input type="checkbox"/> Float		<input type="checkbox"/>
	<input type="checkbox"/> Module	<input type="checkbox"/> Module	<input type="checkbox"/> Module	<input type="checkbox"/> Diaphragm		<input type="checkbox"/>
<input type="checkbox"/> Rubber Kit	<input type="checkbox"/> Rubber Kit	<input type="checkbox"/> Rubber Kit	<input type="checkbox"/> Rubber Kit	Other	<input type="checkbox"/>	
Other/Notes: _____						
Final Test	<input type="checkbox"/> Closed Tight	<input type="checkbox"/> Closed Tight	<input type="checkbox"/> Opened at _____ PSID	Opened Fully Y <input type="checkbox"/> N <input type="checkbox"/>	Air Inlet _____ PSID	Closed Tight <input type="checkbox"/>
				CK Valve _____ PSID		Pass <input type="checkbox"/>
Initial Test By	Certificate	Test Date:	Gauge Num	Company	Phone	
Final Test By						
Repair By						

Notes:



XC2 Software Knowledge Base



How to Print Blank Test Report Forms With Assembly Info

KB Asset ID: 2912

This page describes how to print a group of Blank Test Report Forms with Facility and Assembly information printed directly onto the form

Create a List of Backflow Assemblies

Blank Test Report Forms can be printed from a list of Backflow Assemblies or a list of Facilities

Here I will show you how to print test report forms from a list of assembly records.

First you need to create a list of Backflow Assemblies.

Click the Assembly List Button and search for the assemblies that you would like test reports for.

#	Assy ID	Facility Name	Last Status	Addr (R)	Street	Next Test	Last Test
1	2004666	Rainbow Rebuilders		6694	Abbotsford	01/31/2015	
2	2000997	Sears J L & Associates Real Estate	FAIL/P	7323	Fairway	05/25/2014	09/10/2011
3	2000617	Mex Imports	PASS	6471	Chant	05/25/2014	12/10/2010
4	2000816	North Star Liquor	PASS	7698	Hunters	05/25/2014	04/15/2011
5	2000880	Willie's Place	PASS	8488	Strathmoore		11/02/2010
6	2000904	World Computer Corporation	PASS	7816	Yankee	02/28/2015	08/14/2014
7	2001128	Redding Equipment CO	PASS	2230	Vinmar	05/25/2015	08/14/2014
8	2001140	Resolution Trust Corp	PASS	1905	Hillyer		12/01/2010
9	2001974	Opus One Designs	PASS	3166	Guard-Well	05/25/2014	10/14/2011
10	2002801	Academy Veterinary Hospital	PASS	8350	Lighthouse	05/25/2016	03/09/2015
11	2002926	Children's Hospital	PASS	1552	Naples National	03/31/2016	03/10/2015

Notes:

Highlight Assemblies

Once you have your list

Highlight the Assemblies that you would like forms printed for, then

Click the Report button

The screenshot shows the XC2 Software interface with a table of BFP Assemblies. The table has columns for #, Facility Name, Last Status, Addr (#), Street, Next Test, Last Test, and Serial Number. The 'Report' button in the top toolbar is circled in purple, and a purple arrow points from it to the 'Street' column header. The table contains 7 rows of data, with the 7th row highlighted in blue.

#	Facility Name	Last Status	Addr (#)	Street	Next Test	Last Test	Serial Number
1	Rainbow Rebuilders	PASS	123	West	01/31/17	07/05/16	82993
2	Storewise Software Inc	PASS	5038	Somerset	11/30/11	02/28/10	70031
3	Storewise Software Inc	PASS	5038	Somerset	11/30/11	02/28/10	11541
4	Lakewood Family Medical Clinic Pc	PASS	7846	Champions	01/31/12	04/01/11	BY18
5	Polymedica Industries Inc	PASS	2672	Hornsea	05/31/13	05/06/12	97468
6	Sheridan Sanitation District #2	FAIL	7022	Ryan Meadow	03/31/12	12/01/11	WQ22
7	Peck Doran P C	PASS	1556	Inverness	06/30/13	06/05/12	67592

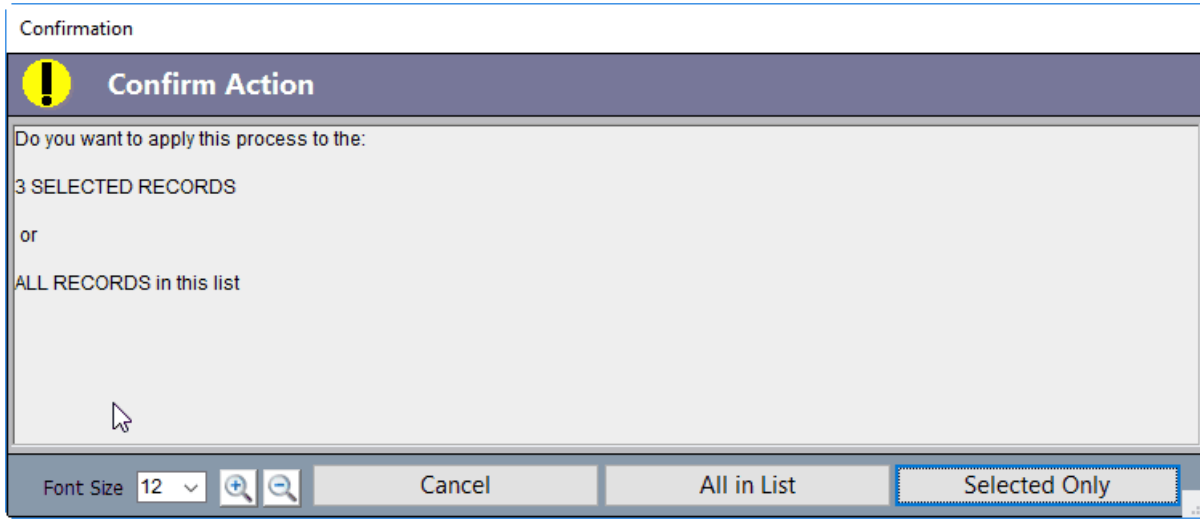
Notes:

Confirmation

You may receive this message:

If you want all to print, Click Apply to All

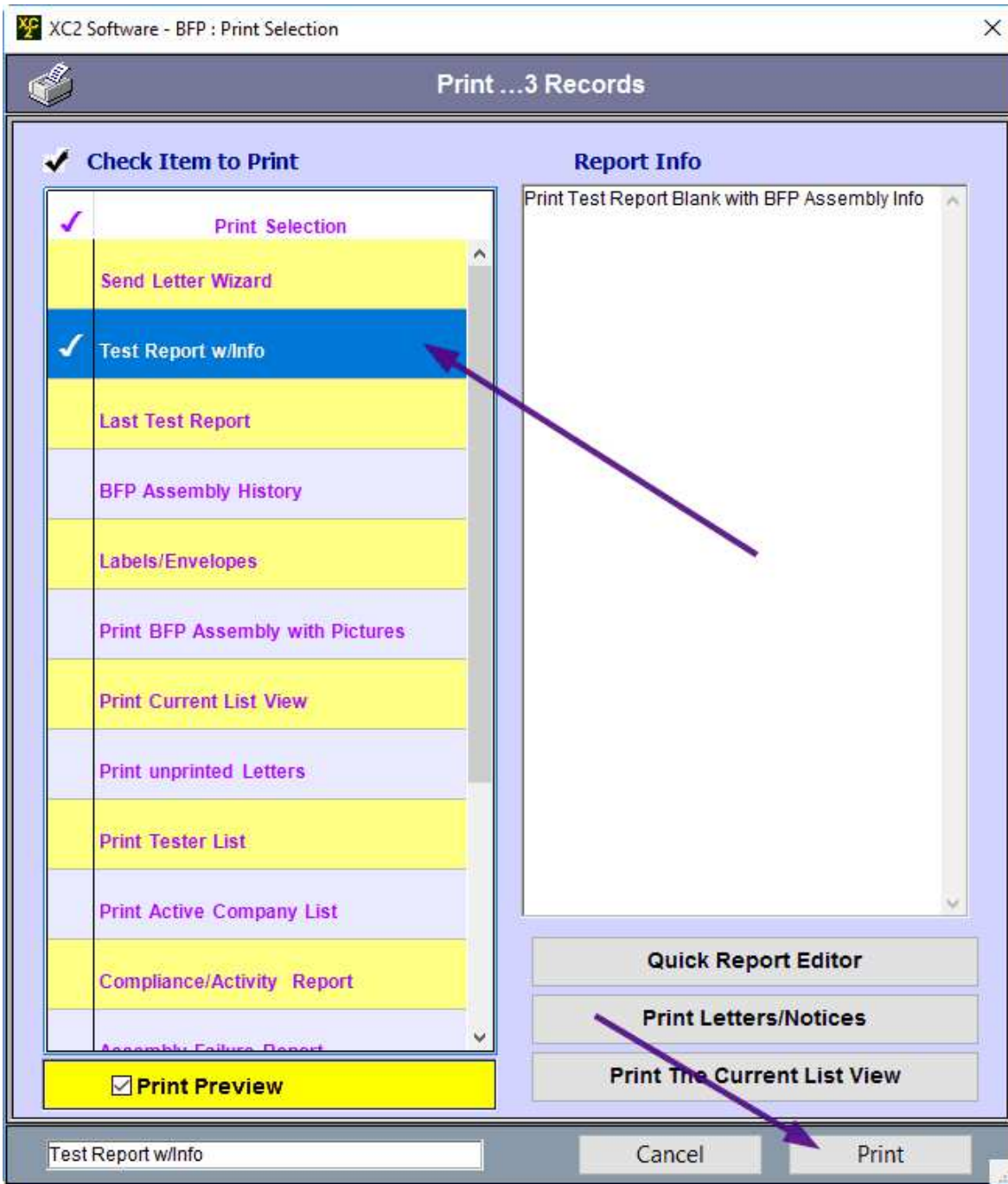
If you only want to print what is selected, click Print Selected or One Only



Notes:

Select Test Report w/Info

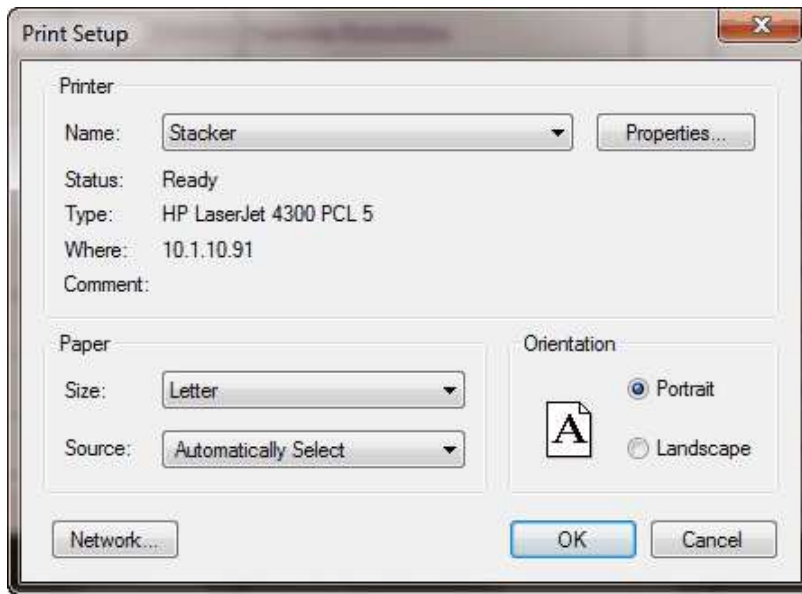
Print



Notes:

Choose Printer

Choose your printer, then print



Notes:

Form With Assembly Information Will Print

City of Snoqualamish, WA

Assembly ID	2000593	Facility Name	T-M Service CO
Acct Number	6669-000	Meter #	
Service Address	1328 S Dogwood Ln Snoqualamish WA 98215		Test Report Due: 02/28/2014
Equip Location		SN	<input type="checkbox"/> 564804
Location ID		Protection Type	Isolation
Contact Name	Ariel Carter	Ph	(696) 236-0940
Map Page		#2	(696) 234-3429
		Model	<input type="checkbox"/> 007M2-FP
		Install Date	02/17/2008
		Permit Num	

Confinement
 Freeze Protect
 Hazard Type
 Hydraulic Equipment
 Haz. Level

05/05/2012 REPAIR by: Alphonzo Hernandez [9488]
 05/05/2012 FAIL/PASS by: Alphonzo Hernandez [9488] : CV1: 2.5 CV1 Final: 6.8 CV2 Fin:
 05/15/2011 PASS by: Alphonzo Hernandez [9488] : CV1: 7.4 CV2: 3.6

Line pressure at time of test: _____ **REPORT OF TEST RESULTS** Approved BFP

	Check Valve #1	Check Valve #2	Relief Valve	PVB/SVB	Shut Off Valves	
Initial Test	<input type="checkbox"/> Held at _____ PSID	<input type="checkbox"/> Held at _____ PSID	<input type="checkbox"/> Opened at _____ PSID	<input type="checkbox"/> Air Inlet Opened at _____ PSID		#1 #2
Pass	<input type="checkbox"/> Closed Tight	<input type="checkbox"/> Closed Tight	<input type="checkbox"/> Did Not Open	Opened Fully Y <input type="checkbox"/> N <input type="checkbox"/>	Closed Tight	<input type="checkbox"/> <input type="checkbox"/>
Fail	<input type="checkbox"/> Leaked	<input type="checkbox"/> Leaked		<input type="checkbox"/> Check Held at _____ PSID	Leaked	<input type="checkbox"/> <input type="checkbox"/>
R E P A I R	<input type="checkbox"/> CLEANED	<input type="checkbox"/> CLEANED	<input type="checkbox"/> CLEANED	<input type="checkbox"/> CLEANED	CLEANED	<input type="checkbox"/> <input type="checkbox"/>
	<input type="checkbox"/> REPLACED	<input type="checkbox"/> REPLACED	<input type="checkbox"/> REPLACED	<input type="checkbox"/> REPLACED	REPLACED	<input type="checkbox"/> <input type="checkbox"/>
	<input type="checkbox"/> Disc	<input type="checkbox"/> Disc	<input type="checkbox"/> Disc	<input type="checkbox"/> Air Inlet Disc	REPAIR	<input type="checkbox"/> <input type="checkbox"/>
	<input type="checkbox"/> Spring	<input type="checkbox"/> Spring	<input type="checkbox"/> Spring	<input type="checkbox"/> Air Inlet Spring		
	<input type="checkbox"/> Guide	<input type="checkbox"/> Guide	<input type="checkbox"/> Diaphragm	<input type="checkbox"/> Check Disc		
	<input type="checkbox"/> Seat	<input type="checkbox"/> Seat	<input type="checkbox"/> Seat	<input type="checkbox"/> Check Spring		
	<input type="checkbox"/> O-Ring(s)	<input type="checkbox"/> O-Ring(s)	<input type="checkbox"/> O-Ring(s)	<input type="checkbox"/> Float		
<input type="checkbox"/> Module	<input type="checkbox"/> Module	<input type="checkbox"/> Module	<input type="checkbox"/> Diaphragm	Other	<input type="checkbox"/> <input type="checkbox"/>	
<input type="checkbox"/> Rubber Kit	<input type="checkbox"/> Rubber Kit	<input type="checkbox"/> Rubber Kit	<input type="checkbox"/> Rubber Kit			
	Other/Notes: _____					
Final Test	<input type="checkbox"/> Closed Tight	<input type="checkbox"/> Closed Tight	<input type="checkbox"/> Opened at _____ PSID	Opened Fully Y <input type="checkbox"/> N <input type="checkbox"/> Air Inlet _____ PSID	Closed Tight	<input type="checkbox"/> <input type="checkbox"/>
				CK Valve _____ PSID	Pass	<input type="checkbox"/>

THE ABOVE REPORT IS CERTIFIED TO BE TRUE: 1A

Initial Test By	Certificate	Test Date:	Gauge Num		Company	Phone
Final Test By						
Repair By						

Notes:



XC2 Software Knowledge Base



Printing Test Report Forms With Info From Facility List

KB Asset ID: 3517

Printing test forms from the facility list can be very helpful in the case the facility has many backflow records.

Select the facility to print your forms from

Notice the facility I have selected has 7 backflow records.

Click Report

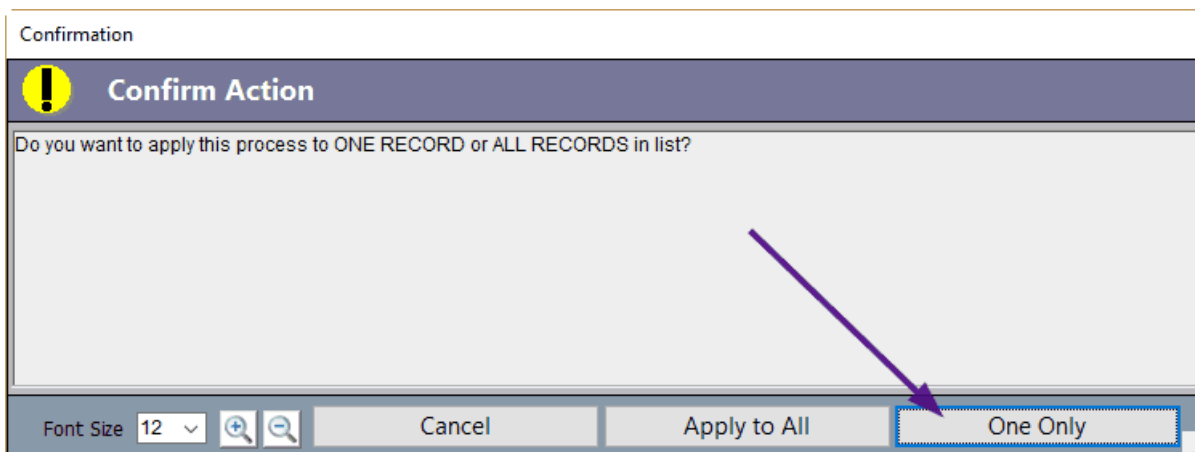
The screenshot shows the XC2 software interface for 'City of Snoqualamish, WA'. The main window displays a table of 76 records. The table has the following columns: #, Facility Name, Addr (#), Street, Site Qty, Sched Code, and Next Survey. The first row is highlighted in blue, and a purple arrow points to the '03-Mar' date in the 'Sched Code' column. The 'Report' button in the top toolbar is circled in red.

#	Facility Name	Addr (#)	Street	Site Qty	Sched Code	Next Survey
1	Children's Hospital	1552	Naples National	7	03-Mar	
2	Bethesda At St Anthony Hospital North	1802	Woodcreek	3	07-Jul	
3	Academy Veterinary Hospital	8350	Lighthouse	2	08-Aug	
4	Lanyon Sprinkler CO	4709	Prairie Run	2	06-Jun	
5	Steward Painting & Restoration	3727	Carter's Corner	2	06-Jun	
6	Steele Elementary School	6916	Crooked Elm	2	03-Mar	
7	R L Plimpton Assoc Inc	7480	Lakehurst	2	09-Sep	
8	Southwest Radiographics	9458	Rolling Ridge	2	12-Dec	
9	World Wide Funding	197	Maxwell	2	05-May	
10	Storewise Software Inc	5038	Somerset	2	11-Nov	
11	Rainbow Rebuilders	6694	Abbotsford	2	01-Jan	
12	Seniors in Community Living Inc	9095	Greyson	2	05-May	
13	Willie		12212	1	05-May	
14	Hospitality Group Inc The	429	Cali Glen	1	10-Oct	
15	Hospitality Flowers & Gifts	6725	Sheridan	1	02-Feb	
16	Hospital Shared Services Warehouse	5998	Buena Park	1	10-Oct	
17	Echosphere Corporation	7210	West View	1	09-Sep	

Notes:

Confirmation

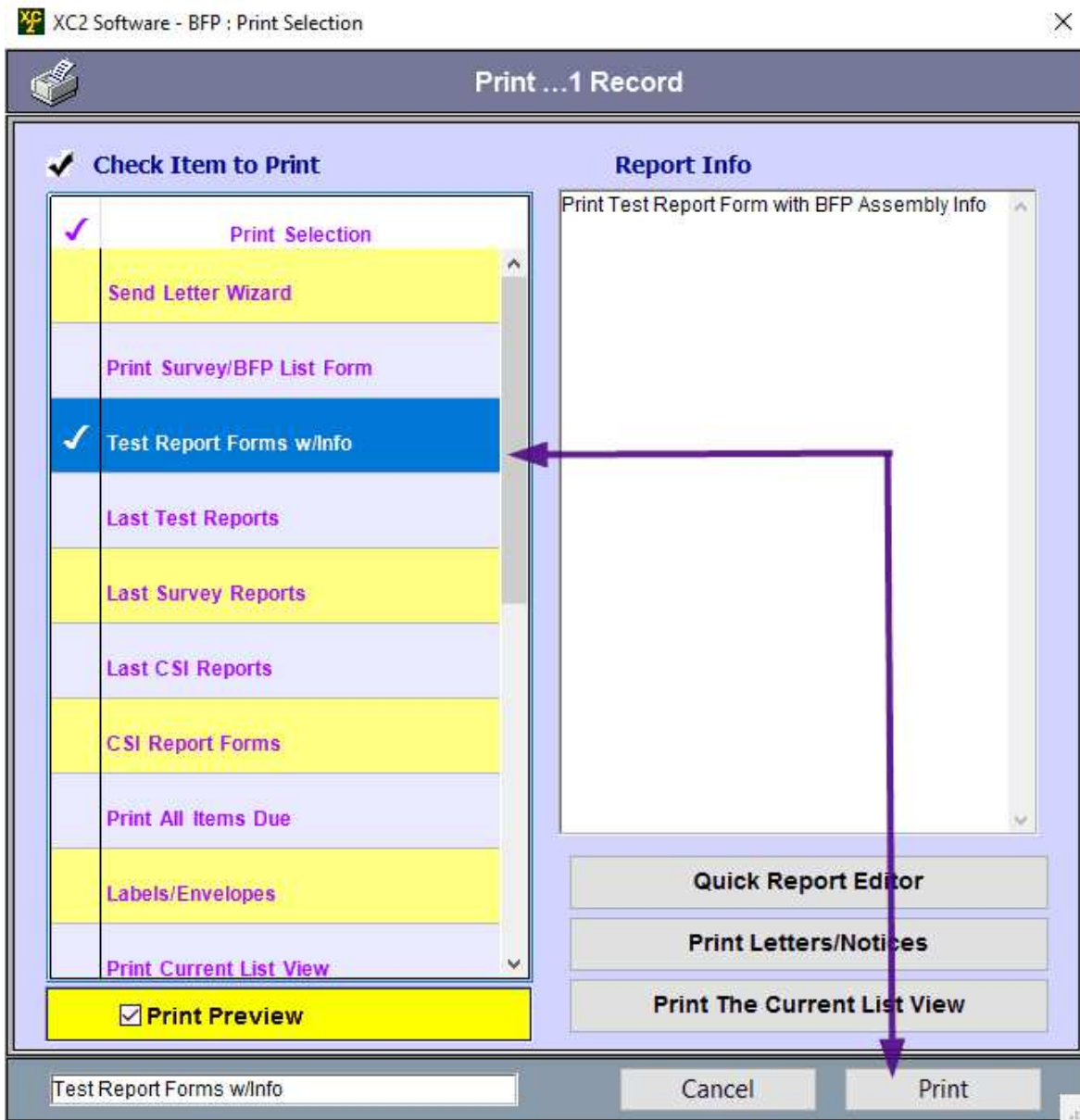
In this case, I am selecting to print my reports from just the one facility record.



Notes:

Select Test Report With Info

Click Print



Notes:

Select the Device

Here, you are given a list of all the assemblies at the facility.

You may choose to print All or selected

Click in the first column next to the device to select or deselect for printing.

Click Used Check Item

Select BFP Assembly

Check Items To Select

<input checked="" type="checkbox"/>	SN	Type	Size	Mfr	Model	Active	Due	Location
<input checked="" type="checkbox"/>	EZ30548	DC	2"	WATTS	007M2PCQT	<input checked="" type="checkbox"/>	03/31/2012	North quad of Hospital e 1
<input checked="" type="checkbox"/>	ME31565	RP	1 1/4"	WATTS	U009Sspcqt	<input checked="" type="checkbox"/>	03/31/2012	3rd floor
<input checked="" type="checkbox"/>	126257	RP	2"	WATTS	U009M1Apcc	<input checked="" type="checkbox"/>	03/31/2011	Basement Laundry Room 1
<input checked="" type="checkbox"/>	659959	RP	3/4"	Ames	4000RP	<input checked="" type="checkbox"/>	03/31/2015	Hydro Pool
<input type="checkbox"/>		NONE				<input checked="" type="checkbox"/>	03/31/2015	X-ray lab Room 12 4th F 1
<input type="checkbox"/>		RP	2"	Ames	400B-A-VUVI	<input checked="" type="checkbox"/>	03/31/2015	Roof top Airconditioning 1
<input checked="" type="checkbox"/>	85778	DC	3/4"	Ames	2000-G-DCA	<input checked="" type="checkbox"/>	03/31/2015	Boiler Room

Items Selected: Cancel

Notes:



XC2 Software Knowledge Base



Printing Last Test Report From Assembly List

KB Asset ID: 3518

Print last test reports to one or multiple assembly records

[Get the list of assemblies you wish to print last test reports for](#)

Click Report

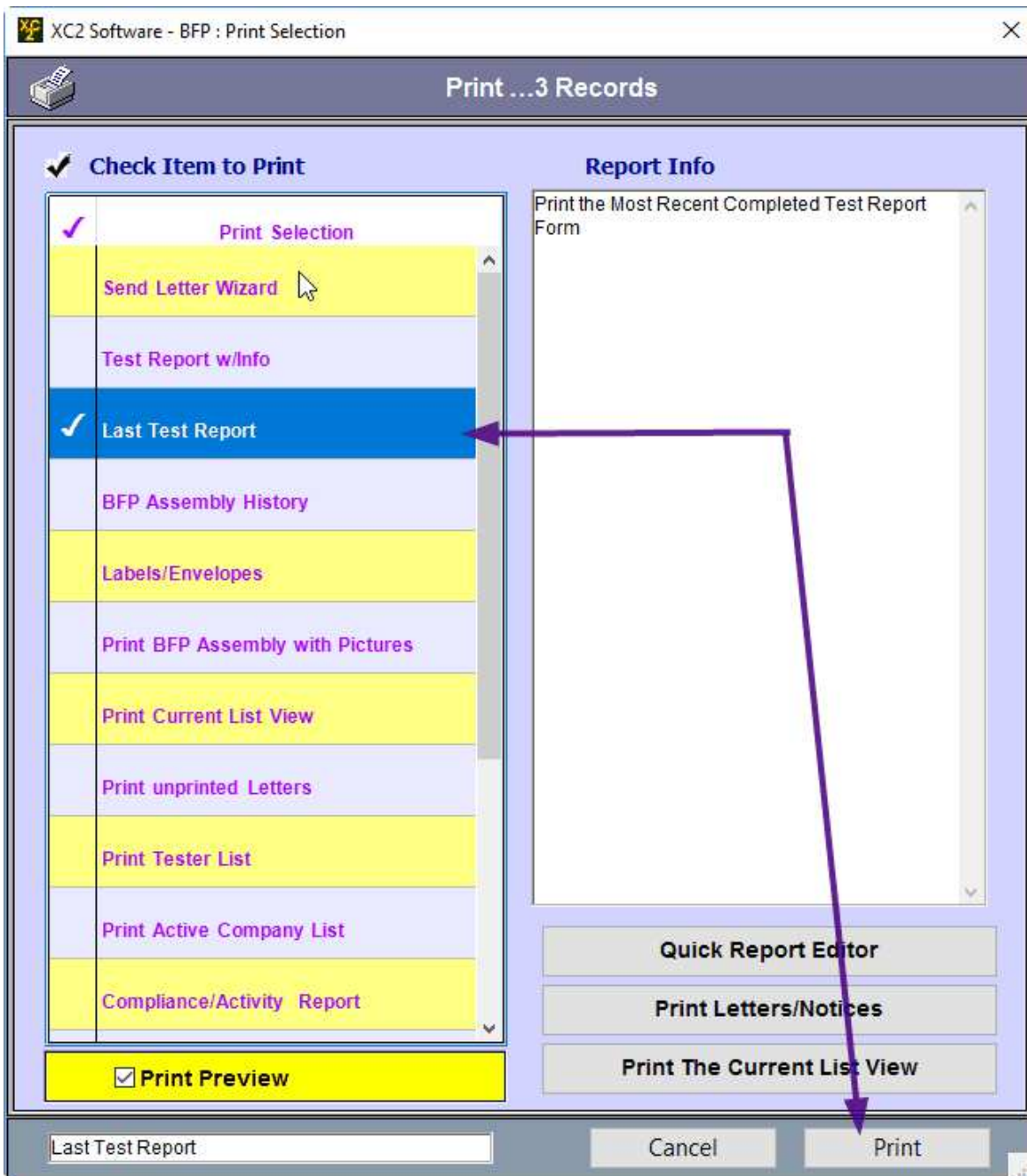
The screenshot shows the XC2 software interface for 'City of Snoqualamish, WA'. The main window displays a table of assembly records. The 'Report' button in the top right corner is circled in purple, with a purple arrow pointing to it. The table contains the following data:

#	Facility Name	Last Status	Addr (#)	Street	Next Test	Last Test	erial Nu
1	Rainbow Rebuilders	FAIL/PASS	123	West	01/31/12	01/15/11	VJ239
2	Rainbow Rebuilders	PASS	123	West	01/31/17	07/05/16	82993
3	Storewise Software Inc	PASS	5038	Somerset	11/30/11	02/28/10	70031

Notes:

[Click on Last Test Report](#)

[Click Print](#)



Notes:

Select Print Option

You may also select to preview the report before printing

The screenshot shows a dialog box titled "Select Test Form Printing" with a sub-header "Backflow Test Report Print Selection". The main area is titled "Printing Test Reports" and contains three checkboxes: "Print a Test Report to Give or Send to Customer" (unchecked), "Print a Test Report to Send to the Water Purveyor" (checked), and "Print Preview" (checked). A purple arrow points from the "Print Preview" checkbox to the "Continue" button at the bottom right. The dialog box has a "Cancel" button and a "Continue" button at the bottom.

Notes:

You now have a complete test form

Printed last test reports include

- Address and Device information
- Test Values
- Repair information
- Tester Information

City of Snoqualamish, WA

x1P

Assembly ID	2000344	Facility Name	Rainbow Rebuilders		
Acot Number	22096-000	Meter #		Return Form By:	01/31/2012
Service Address	123 S West Way			Schedule Code	01-Jan
	Snoqualamish WA 98215			Assembly Info	
Equip Location			SN	VJ23919	
Location ID		Protection Type	Isolation	Mfr	Watts
Contact Name	Kim Cox	Ph	(606) 233-8027	Type	RP
Map Page		#2	(606) 236-1338	Size	2"
				Model	U009M2QT
				Install Date	05/06/2002
				Permit Num	
<input type="checkbox"/> Confinement	<input type="checkbox"/> Freeze Protect	Hazard Type	Air Conditioning System		Haz. Level

Line pressure at time of test: _____

REPORT OF TEST RESULTS

	Check Valve #1	Check Valve #2	Relief Valve	PVB/SVB	Shut Off Valves	
Initial Test	4.8 PSID	<input checked="" type="checkbox"/> Held at _____	<input checked="" type="checkbox"/> Opened at: _____	Air Inlet Opened at _____ PSID		
Fail	<input type="checkbox"/> Closed Tight	<input checked="" type="checkbox"/> Closed Tight	2.1 PSID	<input type="checkbox"/> Did Not Open	Closed Tight	<input type="checkbox"/> #1 <input type="checkbox"/> #2
	<input type="checkbox"/> Leaked	<input type="checkbox"/> Leaked	<input type="checkbox"/> Did Not Open	Opened Fully <input type="checkbox"/>	Leaked	<input type="checkbox"/>
R E P A I R	<input type="checkbox"/> Cleaned REPLACED	<input type="checkbox"/> Cleaned REPLACED	<input type="checkbox"/> Cleaned REPLACED	CV _____ PSID	Cleaned	<input type="checkbox"/>
	<input type="checkbox"/> Disc	<input type="checkbox"/> Disc	<input type="checkbox"/> Disc(s)	<input type="checkbox"/> Leaked	Replaced	<input type="checkbox"/>
	<input type="checkbox"/> Spring	<input type="checkbox"/> Spring	<input type="checkbox"/> Spring	<input type="checkbox"/> Cleaned	Repair	<input type="checkbox"/>
	<input type="checkbox"/> Guide	<input type="checkbox"/> Guide	<input type="checkbox"/> Diaphragm	REPLACED	Other	<input type="checkbox"/>
	<input type="checkbox"/> Seat	<input type="checkbox"/> Seat	<input type="checkbox"/> Seat	<input type="checkbox"/> Air Inlet Disc		
	<input type="checkbox"/> Module	<input type="checkbox"/> Module	<input type="checkbox"/> O-Ring(s)	<input type="checkbox"/> Air Inlet Spring		
	<input type="checkbox"/> Rubber Kit	<input type="checkbox"/> Rubber Kit	<input type="checkbox"/> Module	<input type="checkbox"/> Check Disc		
	<input type="checkbox"/> O-Ring(s)	<input type="checkbox"/> O-Ring(s)	<input type="checkbox"/> Rubber Kit	<input type="checkbox"/> Check Spring		
Pass				Opened Fully <input type="checkbox"/>		
Final Test	5.6 PSID	_____ PSID	Opened at _____	Air Inlet _____ PSID		
	<input checked="" type="checkbox"/> Closed Tight	<input checked="" type="checkbox"/> Close Tight	2.8 PSID	CK Valve _____ PSID	Closed Tight	<input type="checkbox"/>

THE ABOVE REPORT IS CERTIFIED TO BE TRUE:

Initial Test By	Certificate	Date:	Gauge Num	Company	Phone
Alphonzo Hernandez	9488	01/15/11			
Final Test By					
Alphonzo Hernandez	9488	01/15/11			
Repair By					
Alphonzo Hernandez	9488	01/15/11			

Notes:



XC2 Software Knowledge Base



Print Last Test Report From Facility List

KB Asset ID: 3519

You can print all or selected last test entries from a facility

Get a list of facility records to print last test report for.

In this case I have 1 facility selected

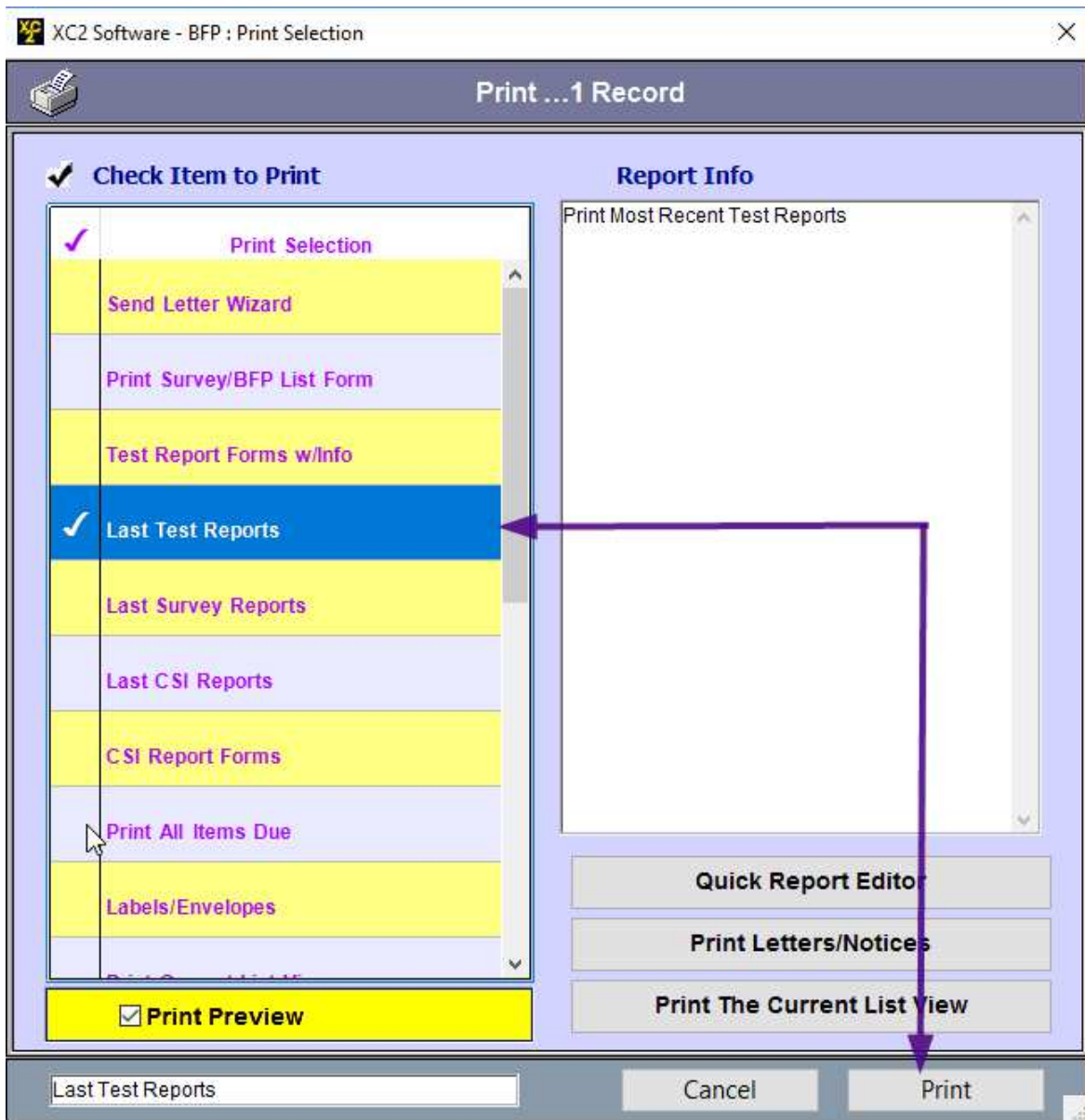
Click Report

The screenshot shows the XC2 software interface. At the top, there is a menu bar with options: Add, Delete, Find, Sort, Show All, Export, Saved Search, and Report. The 'Report' button is circled in purple, and a purple arrow points to it from the text 'Click Report' above. Below the menu bar, there is a 'Main Page Functions' section with a search box containing 'Facility Name' and a dropdown menu. The main area is a table with columns: #, Facility Name, Addr (#), Street, Site Qty, Sched Code, and Next Survey. The first row is highlighted in blue and contains the following data: 1, Children's Hospital, 1552, Naples National, 7, 03-Ma. To the left of the table is a sidebar with 'Select Special Function' and 'Favorite Tasks' sections. The 'Favorite Tasks' section includes 'Facility List', 'BFP Assembly List', 'BFP Testers List', 'Tester Company List', 'Test Kits List', 'Test History', 'Facility Survey History List', and 'Notice Setup'. At the bottom of the interface, there are buttons for 'Send Notice', 'Enter Survey', 'Enter Test', and 'Exit XC2'.

Notes:

Select Last Test Report

Click Print



Notes:

Select records to print

You can choose to

Print Test Report For All Records or Selected

Click in the checkbox column to select or deselect item for printing.

Click Used Checked Item

The screenshot shows a dialog box titled "Select BFP Assembly" with a close button (X) in the top right corner. Below the title bar is a header "Check Items To Select". The main area contains a table with the following columns: a checkbox column, SN, Type, Size, Mfr, Model, Active, Last, Due, Location, and a final column with "1552 Na". There are 8 rows of data. The first row has SN "EZ30848", Type "DC", Size "2\"", Mfr "WATTS", Model "007M2PCQT", Active checked, Last "03/16/2011", Due "03/31/2012", and Location "North quad of Hospital east wing". The second row has SN "ME31565", Type "RP", Size "1 1/4\"", Mfr "WATTS", Model "U009Sspcqt", Active checked, Last "04/16/2011", Due "03/31/2012", and Location "3rd floor". The third row has SN "126257", Type "RP", Size "2\"", Mfr "WATTS", Model "U009M1Apcc", Active checked, Last "01/10/2010", Due "03/31/2011", and Location "Basement Laundry Room". The fourth row has SN "659959", Type "RP", Size "3/4\"", Mfr "Ames", Model "4000RP", Active checked, Last empty, Due "03/31/2015", and Location "Hydro Pool". The fifth row has SN empty, Type "NONE", Size empty, Mfr empty, Model empty, Active checked, Last empty, Due "03/31/2015", and Location "X-ray lab Room 12 4th Floor". The sixth row has SN empty, Type "RP", Size "2\"", Mfr "Ames", Model "400B-A-VUVI", Active checked, Last empty, Due "03/31/2015", and Location "Roof top Airconditioning Unit". The seventh row has SN "85778", Type "DC", Size "3/4\"", Mfr "Ames", Model "2000-G-DCA", Active checked, Last empty, Due "03/31/2015", and Location "Boiler Room". Below the table is a status bar with "Items Selected: 7" and a "Cancel" button. At the bottom of the dialog are five buttons: "Check All", "Clear All", "Check Highlighted", "UnCheck Highlight...", and "Use Checked Items". A purple circle highlights the "Use Checked Items" button, and a purple arrow points from the "Use Checked Items" button to the "ME31565" row in the table.

<input checked="" type="checkbox"/>	SN	Type	Size	Mfr	Model	Active	Last	Due	Location	1552 Na
<input checked="" type="checkbox"/>	EZ30848	DC	2"	WATTS	007M2PCQT	<input checked="" type="checkbox"/>	03/16/2011	03/31/2012	North quad of Hospital east wing	1552 Na
<input checked="" type="checkbox"/>	ME31565	RP	1 1/4"	WATTS	U009Sspcqt	<input checked="" type="checkbox"/>	04/16/2011	03/31/2012	3rd floor	1552 Na
<input checked="" type="checkbox"/>	126257	RP	2"	WATTS	U009M1Apcc	<input checked="" type="checkbox"/>	01/10/2010	03/31/2011	Basement Laundry Room	1552 Na
<input checked="" type="checkbox"/>	659959	RP	3/4"	Ames	4000RP	<input checked="" type="checkbox"/>		03/31/2015	Hydro Pool	1552 Na
<input checked="" type="checkbox"/>		NONE				<input checked="" type="checkbox"/>		03/31/2015	X-ray lab Room 12 4th Floor	1552 Na
<input checked="" type="checkbox"/>		RP	2"	Ames	400B-A-VUVI	<input checked="" type="checkbox"/>		03/31/2015	Roof top Airconditioning Unit	1552 Na
<input checked="" type="checkbox"/>	85778	DC	3/4"	Ames	2000-G-DCA	<input checked="" type="checkbox"/>		03/31/2015	Boiler Room	1552 Na

Notes:

Make Your Print Selection

You may also choose to print preview

Continue

Select Test Form Printing

Backflow Test Report Print Selection

Printing Test Reports

Print a Test Report to Give or Send to Customer

Print a Test Report to Send to the Water Purveyor

Print Preview

Cancel Continue

Notes:

Test Form For Last Test Entered

City of Snoqualamish, WA

x1P

Assembly ID	2000065	Facility Name	Children's Hospital		
Acct Number		Meter #		Return Form By:	03/31/2012
Service Address	1552 Naples National CT			Schedule Code	03-Mar
	Snoqualamish WA 98215			Assembly Info	
Equip Location	North quad of Hospital east wing			SN	EZ30548
Location ID		Protection Type	Containment	Mfr	Watts
Contact Name	Cleo Hernandez	Ph	(696) 237-6089	Type	DC
Map Page		#2	(206) 555-1212	Size	2"
				Model	007M2PCQT-V
				Install Date	
				Permit Num	

Confinement
 Freeze Protect
 Hazard Type Irrigation, Lawn
 Haz. Level

Line pressure at time of test:

REPORT OF TEST RESULTS

	Check Valve #1	Check Valve #2	Relief Valve	PVB/SVB	Shut Off Valves	
Initial Test	6.4 PSID	<input checked="" type="checkbox"/> Held at 3.2	<input type="checkbox"/> Opened at: _____ PSID	Air Inlet Opened at _____ PSID		#1 #2
Pass	<input checked="" type="checkbox"/> Closed Tight	<input checked="" type="checkbox"/> Closed Tight	<input type="checkbox"/> Did Not Open	<input type="checkbox"/> Did Not Open	Closed Tight	<input type="checkbox"/> <input type="checkbox"/>
R E P A I R	<input type="checkbox"/> Leaked	<input type="checkbox"/> Leaked	<input type="checkbox"/> Cleaned REPLACED	Opened Fully <input type="checkbox"/>	Leaked	<input type="checkbox"/> <input type="checkbox"/>
	<input type="checkbox"/> Cleaned REPLACED	<input type="checkbox"/> Cleaned REPLACED	<input type="checkbox"/> Disc(s)	CV _____ PSID	Cleaned	<input type="checkbox"/> <input type="checkbox"/>
	<input type="checkbox"/> Disc	<input type="checkbox"/> Disc	<input type="checkbox"/> Spring	<input type="checkbox"/> Leaked	Replaced	<input type="checkbox"/> <input type="checkbox"/>
	<input type="checkbox"/> Spring	<input type="checkbox"/> Spring	<input type="checkbox"/> Diaphragm	<input type="checkbox"/> Cleaned	Repair	<input type="checkbox"/> <input type="checkbox"/>
	<input type="checkbox"/> Guide	<input type="checkbox"/> Guide	<input type="checkbox"/> Seat	REPLACED	Other	<input type="checkbox"/> <input type="checkbox"/>
	<input type="checkbox"/> Seat	<input type="checkbox"/> Seat	<input type="checkbox"/> O-Ring(s)	<input type="checkbox"/> Air Inlet Disc		
Final Test	_____ PSID	_____ PSID	Opened at _____ PSID	Opened Fully <input type="checkbox"/>		
	<input type="checkbox"/> Closed Tight	<input type="checkbox"/> Close Tight		Air Inlet _____ PSID		
				CK Valve _____ PSID	Closed Tight	<input type="checkbox"/> <input type="checkbox"/>

THE ABOVE REPORT IS CERTIFIED TO BE TRUE:

Initial Test By	Certificate	Date:	Gauge Num	Company	Phone
Glen Collins	8990	03/16/11			
Final Test By		00/00/00			
Repair By		00/00/00			

Notes:



XC2 Software Knowledge Base



Print Current Active Certified Tester List

KB Asset ID: 3520

Printing a list of Active Certified testers

From The Main Screen

Click Report

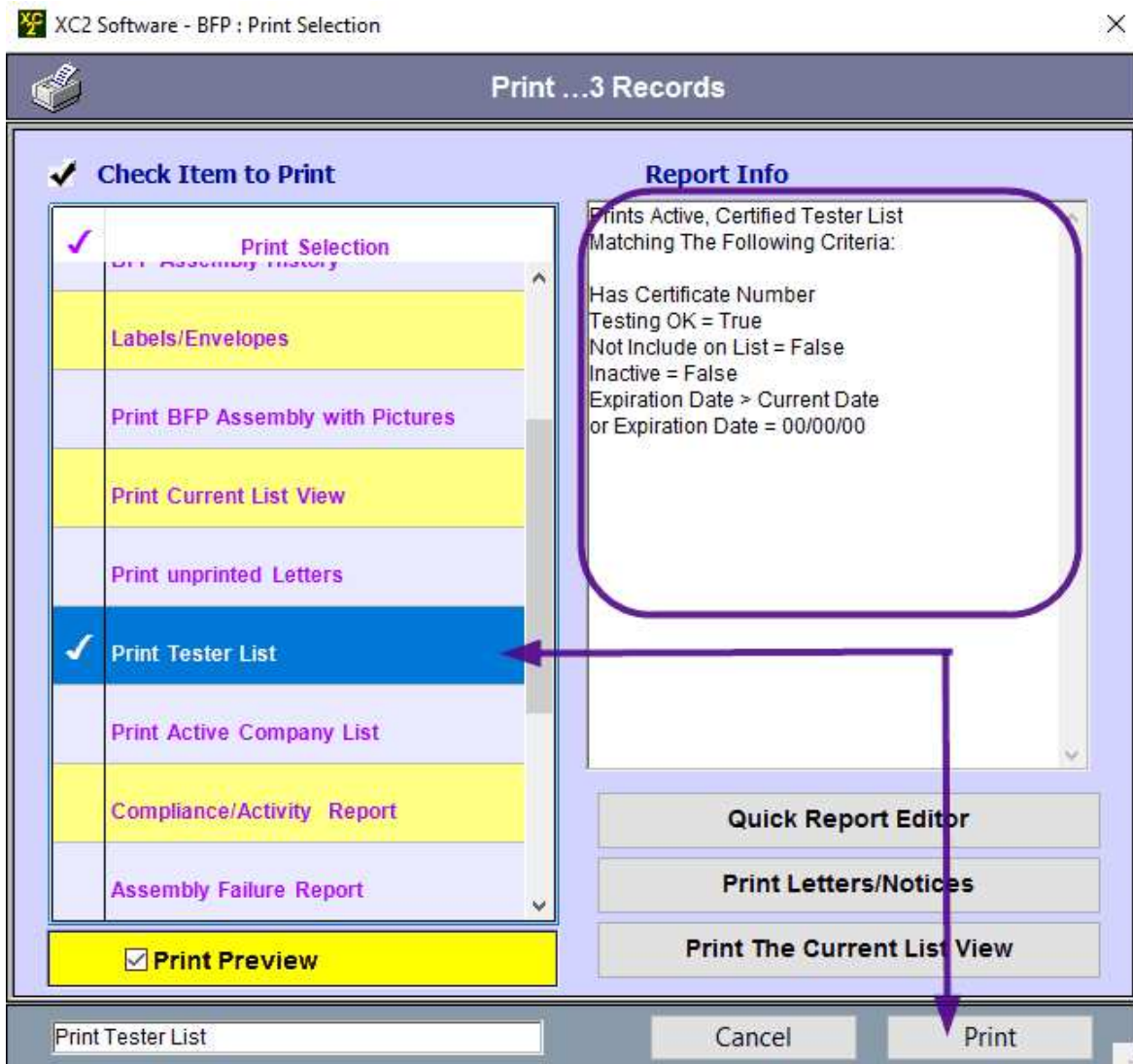
The screenshot shows the XC2 software interface for 'City of Snoqualamish, WA'. The main window title is 'XC2 Software - BFP : City of Snoqualamish, WA: * BFP Assembly: 3 of 92 Records : Multi-Line'. The interface includes a menu bar with options like 'Add', 'Delete', 'Find', 'Sort', 'Show All', 'Export', 'Saved Search', and 'Report'. The 'Report' button is circled in red. Below the menu bar, there are 'Main Page Functions' and a search bar for 'Facility Name'. A table displays the following data:

#	Facility Name	Last Status	Addr (#)	Street	Next Test	Last Test	erial Nu
1	Rainbow Rebuilders	FAIL/PASS	123	West	01/31/12	01/15/11	VJ235
2	Rainbow Rebuilders	PASS	123	West	01/31/17	07/05/16	82993
3	Storewise Software Inc	PASS	5038	Somerset	11/30/11	02/28/10	70031

At the bottom of the interface, there are buttons for 'Send Notice', 'Enter Survey', 'Enter Test *', and 'Exit XC2'. A 'Filter On' checkbox is also present.

Notes:

Select Print Testers List



Notes:

What Testers Records Will Be Included On List

In order for a tester to be included on the Active Tester List, they must

- Record must be Active
- Tester has certification number
- Tester Certification date must be current or be 00/00/00
- Do Not Include On List must not be checked
- Testing OK selected

BFP Testers : Information Import Fields System ID 100046 PERSONNEL_06-03-A

First Name: Horace MI: Z Last Name: Zagnutz
 Salutation: Position: Owner/Tester/Technit
 Full Name: Horace Zagnutz
 Company: Zagnutz Testing System **Must Be Current**
 Type: Tester Code/Incls:
 Status: Status 1 Employee Num: Sched Code:
 Driver License #:
 Tester Address: Address 1: 2469 Cummings Way
 Address 2:
 City/ST/Zip: Snoqualamish WA 98215
 Phone: (509) 555-2368 FAX:
 Cellular:
 E Mail:
Must Not Be Checked

Certified for:	Certification #	Certified By	Cert Date	Cert Exp Date
<input checked="" type="checkbox"/>	246969		09/29/2016	09/29/2019
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				

Local Registration Info: Reg Number, Reg Date, Reg Exp Date, Reg Amt
 Personnel Status Fields: Inactive (Warning), Inactive - Permanent, Personnel UD CB 01, Personnel UD CB 02

UD Alpha 1: Load Signature
 UD Alpha 2: Secure Comme...

On Authorized List: Not on Public List **Must Not Be Checked**
 Resp. Managing Employee:

Mfr	Part	Lot	Cert Date	Cert Due	Arbuckl
Mid-West	860	99999999	05/27/2010	05/27/2011	Arbuckl
Watts	Tk99D	646945645	12/02/2009	12/02/2010	Benedik

Buttons: Add Test Kit, Delete Test Kit, View Test Kit, Expand List

Comments, Statistics, Photo, Date, Expand Comments, Paste from Clipbo..., User Defined, Additional Cert Info, Click Load From Fi...

XC2 Picts XC2 User Insurance Info Module Mgr New Search Print << < > >> Cancel Save

Notes:

Active Report

City of Snoqualamish, WA
Certified Backflow Prevention Assembly
Tester List

Tester Name/Company	Address	City/ST/Zip	Phone	Certification	
Alphonzo Hernandez Home Town Backflow		Snoqualamish WA 98215	(696) 240-5700 (503) 555-1469	9488	03/29/17
Devin Robinson Jimbo's Better Backflow		Snoqualamish WA 98215	(696) 237-8072 (696) 240-6471	5782	06/11/19
Enrico Albinoni City of Snoqualamish			(503) 555-2587	99911	01/30/19
Glen Collins Metro Transit	1111 Delta	Oregon City OR 97045	(415) 555-1212	8990	07/07/19
Horace Zagnutz Zagnutz Testing System	2469 Cummings Way	Snoqualamish WA 98215	(503) 555-2368	246969	09/29/19
Ivory Edwards Jimbo's Better Backflow		Snoqualamish WA 98215	(696) 240-5287 (696) 240-6471	8302	08/16/18
Mike Kidd Whistler Testing Services	3469 Younder	Oregon City OR 97045	(503) 555-6962	696969	12/29/18
Nelson Bryant Icabods Backflow		Snoqualamish WA 98215	(696) 238-0637 (503) 555-6983	3326	11/18/19
Salvador Gray Whistler Testing Services	8782 Main Street	Snoqualamish WA 98215	(696) 239-0602 (503) 555-6962	5507	01/23/19
Vincente Perry Home Town Backflow		Snoqualamish WA 98215	(696) 239-1609 (503) 555-1469	6413	10/24/19
WEB TESTER AAA Testing	1445 Delta Ave	San Rafael CA 94901	(415) 555-1212	111555	07/08/19

Notes:



XC2 Software Knowledge Base



Print Blank Survey Form

KB Asset ID: 2045

Page shows were in XC2 you can print blank Survey Forms

Report

From the Main Screen

Click Report

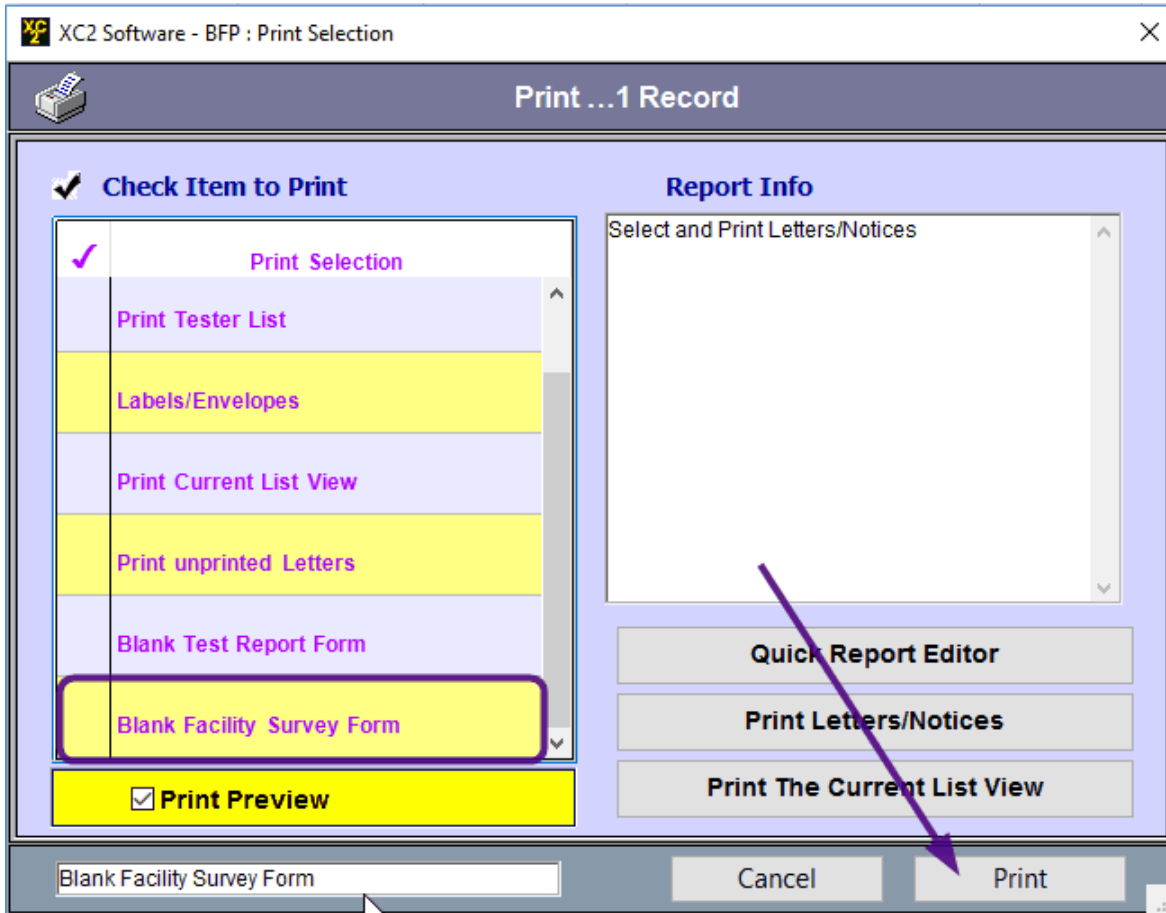
The screenshot shows the XC2 software interface. At the top, there is a menu bar with options: Add, Delete, Find, Sort, Show All, Export, Saved Search, and Report. The 'Report' button is circled in purple. Below the menu bar, there is a search bar with the text 'Find: Facility Name'. The main area contains a table with the following data:

#	Facility Name	Last Status	Addr (#)	Street	Next Test	Last Test	rial Nu
1	Rainbow Rebuilders	FAIL/PASS	123	West	01/31/12	01/15/11	VJ235 W
2	Rainbow Rebuilders	PASS	123	West	01/31/17	07/05/16	82993 W
3	Storewise Software Inc	PASS	5038	Somerset	11/30/11	02/28/10	70031 W

On the left side, there are two panels: 'Select Special Function' and 'Favorite Tasks'. The 'Favorite Tasks' panel is expanded to show a list of tasks including 'Facility List', 'BFP Assembly List', 'BFP Testers List', 'Tester Company List', 'Test Kits List', 'Test History', 'Facility Survey History List', and 'Notice Setup'. At the bottom, there are several buttons: 'Selection ...', 'Filter On', 'Exclude Inactive BFP Assembly Records', 'Send Notice', 'Enter Survey', 'Enter Test *', and 'Exit XC2'.

Notes:

Select Blank Survey Form



Notes:

Sample Form

City of Snoqualamish, WA <hr/> Cross-Connection Control Survey/Inspection Report					
Facility Name	<input type="text"/>	Survey Date	<input type="text"/>		
Facility Name 2	<input type="text"/>	Survey By	<input type="text"/>		
Service Loc/Address	<input type="text"/>				
Contact Name	<input type="text"/>	Contact Phone	<input type="text"/>		
Area Name	<input type="text"/>	Acct Number	<input type="text"/>		
Service Type	<input type="text"/>	Facility Status	<input type="text"/>		
Comments	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>				
BFP/CC Info					
# 1	Location Floor	<input type="text"/>	Location Room	<input type="text"/>	<input type="checkbox"/> Confined Space
	Equip Location	<input type="text"/>			<input type="checkbox"/> UnApproved
	Type	<input type="text"/>	Location ID	<input type="text"/>	<input type="checkbox"/> Freeze Protection
	Mfr	<input type="text"/>	Meter #	<input type="text"/>	Map Page
	Size	<input type="text"/>	Hazard Type	<input type="text"/>	
	Model	<input type="text"/>	Haz. Level	<input type="text"/>	Protection Type
	Serial Num	<input type="text"/>	Install Date	<input type="text"/>	Status
# 2	Location Floor	<input type="text"/>	Location Room	<input type="text"/>	<input type="checkbox"/> Confined Space
	Equip Location	<input type="text"/>			<input type="checkbox"/> UnApproved
	Type	<input type="text"/>	Location ID	<input type="text"/>	<input type="checkbox"/> Freeze Protection
	Mfr	<input type="text"/>	Meter #	<input type="text"/>	Map Page
	Size	<input type="text"/>	Hazard Type	<input type="text"/>	
	Model	<input type="text"/>	Haz. Level	<input type="text"/>	Protection Type
	Serial Num	<input type="text"/>	Install Date	<input type="text"/>	Status
# 3	Location Floor	<input type="text"/>	Location Room	<input type="text"/>	<input type="checkbox"/> Confined Space
	Equip Location	<input type="text"/>			<input type="checkbox"/> UnApproved
	Type	<input type="text"/>	Location ID	<input type="text"/>	<input type="checkbox"/> Freeze Protection
	Mfr	<input type="text"/>	Meter #	<input type="text"/>	Map Page
	Size	<input type="text"/>	Hazard Type	<input type="text"/>	
	Model	<input type="text"/>	Haz. Level	<input type="text"/>	Protection Type
	Serial Num	<input type="text"/>	Install Date	<input type="text"/>	Status

Notes:



XC2 User Manual

Lookup/Resource Lists

- **Lookup/Resource List Overview**
- **Adding BFP Hazard Types**
- **Adding Backflow Models**
- **Adding Backflow Sizes**
- **Adding Backflow Manufacturers**
- **Adding Test Kit Models**
- **Boiler Plates**



XC2 Software Knowledge Base



Lookup/Resource List Overview

KB Asset ID: 3527

This Page Describes What the Lookup/Resource list is, and how to modify items in this area.

What is Lookup/Resources List?

The Lookup/Resources list area is an important configuration area that allows users to customize specific items in XC2.

Items that can be customized in the lookup/resource area includes

- 1) Zip Codes
- 2) Equipment Types
- 3) H2O Organizations
- 4) Most Pulldown Menus
- 5) Hazard Types

View Setup Lists

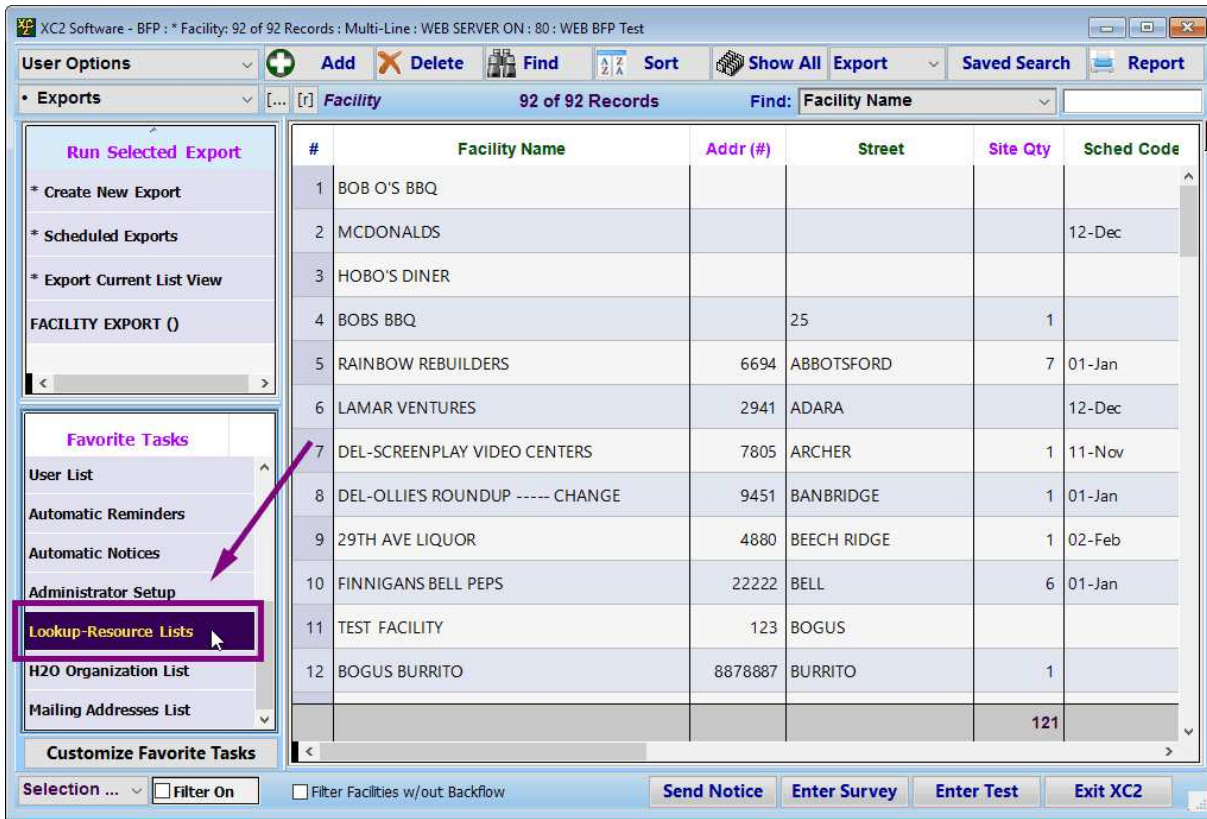
Select a Setup List To View

Setup Lists	ID
Activity Type	010
BFP Hazard Type	025
Boiler Plate Text	066
Business Category Code	029
Choice List Manager	003
Compliance Rpt Category	170
Equipment Model	002
Equipment Model Size	028
Equipment Size	014
Equipment Type	015
Fixture Type	090
H2O Organization	021
...	...

Cancel Select

Where do I find the Lookup/Resource List?

This area can be found under favorite tasks.



Notes:

Example - Zip Codes

Most of the Items in the Lookup/Resource list area are customized the same way.

here I will demonstrate an example of how to create a new zip code

Create a new Zip Code record

Highligh Zip Code and click select

View Setup Lists

Select a Setup List To View

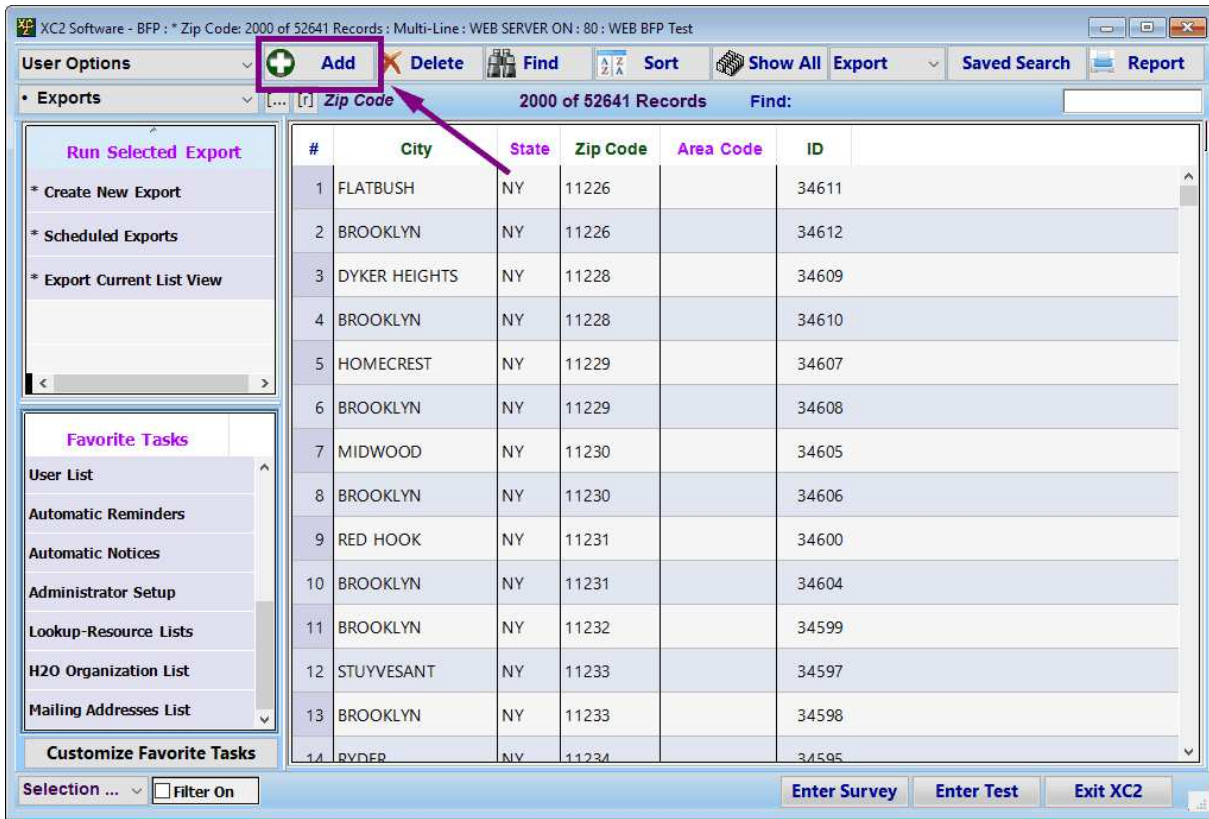
Setup Lists	ID
Activity Type	010
BFP Hazard Type	025
Boiler Plate Text	066
Business Category Code	029
Choice List Manager	003
Compliance Rpt Category	170
Equipment Model	002
Equipment Model Size	028
Equipment Size	014
Equipment Type	015
Fixture Type	090
H2O Organization	021
Line Item Codes	074
Manufacturers	022
Schedule Code	033
Street List	058
Test Kit Models	040
User	012
Zip Code	011

Cancel Select

Notes:

Add New Zip Code Record

Click Add to create a new Zip Code Record



Notes:

Save You New Entry

Enter

Zip Code

City

State

Area Code (optional)

XC2 Software - BFP : New Record For: : Zip Code : WEB SERVER ON : 80 : WEB BFP Test

Zip Code Entry ZIP.2

Zip Code 55599

City ANYTOWN

State/Province CA Area Code 555

County (Opt.) XC2-County

New Search < < > > Cancel Save

Notes:

Zipcode will be Added

The screenshot shows the XC2 Software interface with a table of records. The table has columns for #, City, State, Zip Code, Area Code, and ID. Row 38 is highlighted in blue and enclosed in a purple box. A purple arrow points to this row. The interface includes a menu bar with options like Add, Delete, Find, Sort, Show All, Export, Saved Search, and Report. On the left, there are sections for 'Run Selected Export' and 'Favorite Tasks'. At the bottom, there are buttons for 'Enter Survey', 'Enter Test', and 'Exit XC2'.

#	City	State	Zip Code	Area Code	ID
29	AMIRET	MN	56112		25988
30	ANAHUAC	TX	77514		47087
31	ANDOVER	MN	55304		25759
32	ANGLETON	TX	77516		47084
33	ANGLETON	TX	77515		47085
34	ANGORA	MN	55703		25441
35	ANNANDALE	MN	55302		25764
36	ANOKA	MN	55304		25761
37	ANOKA	MN	55303		25763
38	ANYTOWN	CA	55599	555	104577
39	APPLE VALLEY	MN	55124		25807
40	ARAGO	OR	97458		40787
41	ARCADIA	OH	44804		37752
42	ARCADIA	TX	77517		47082

Notes:



XC2 Software Knowledge Base



Adding Hazard Types/Facility Types

KB Asset ID: 2641

Hazard Types and Facility Types are used to categorize Assembly records and Facility records in XC2.

What is a Hazard Type?

A Hazard type is a specific type of Hazard that when present may require a Backflow Assembly to be installed.

Common Hazard Types Include

- Swimming Pools
- Cooling Towers
- Plating Facilities

XC2 Software - BFP : City of Snoqualamish, WA: * BFP Hazard Type: 88 of 121 Records : Multi-Line

User Options: Add, Delete, Find, Sort, Show All, Export, Saved Search, Report

Quick Lookups: BFP Hazard Type 88 of 121 Records Find: Facility Name

#	Service Type	Code	Location Condition Type	Level	Hazard Type
57	Industrial	PETROLIUM PROCE	Petroleum Processing or Storage	High	Hazard Typ
58	Commercial	PHOTO PROCESSIN	Photo Processing/Chemical Base	High	Hazard Typ
59	Industrial	PLATING	Plating	High	Hazard Typ
60	Commercial	PLUMBING: SANITAR	Plumbing: Sanitary Service	High	Hazard Typ
61	Miscellaneous	PRESSURE BOOSTI	Pressure Boosting System	Low	Hazard Typ
62	Commercial	PUBLIC STORAGE	Public Storage	Low	Hazard Typ
63	Commercial	PUBLIC SWIMMING P	Public Swimming Pool/Cabana	Low	Hazard Typ
64	Commercial	RADIATOR SHOP	Radiator Shop	High	Hazard Typ
65	Miscellaneous	RECLAIMED WATER	Reclaimed Water	Low	Hazard Typ
66	Industrial	RECLAIMED WATER	Reclaimed Water System not con	Low	Hazard Typ
67	Commercial	RESTAURANT/BARS	Restaurant/Bars	Low	Hazard Typ
68	Sewage	SANITARY DUMP	Sanitary Dump Station	High	Hazard Typ
69	Miscellaneous	SCHOOL W/LAB	School w/Lab	High	Hazard Typ
70	Commercial	SEPTIC TANK SVC	Septic Tank Svc	High	Hazard Typ
71	Commercial	SERV. STATIONS W	Serv. Stations w/Bays	High	Hazard Typ
72	Commercial	SHOPPING MALL	Shopping Mall	Low	Hazard Typ
73		SPECIALIZED	Specialized	High	Hazard Typ
74	Commercial	STEAM CLEANING	Steam Cleaning	Low	Hazard Typ
75	Government	STORAGE FACILITY	Storage Facility	High	Hazard Typ

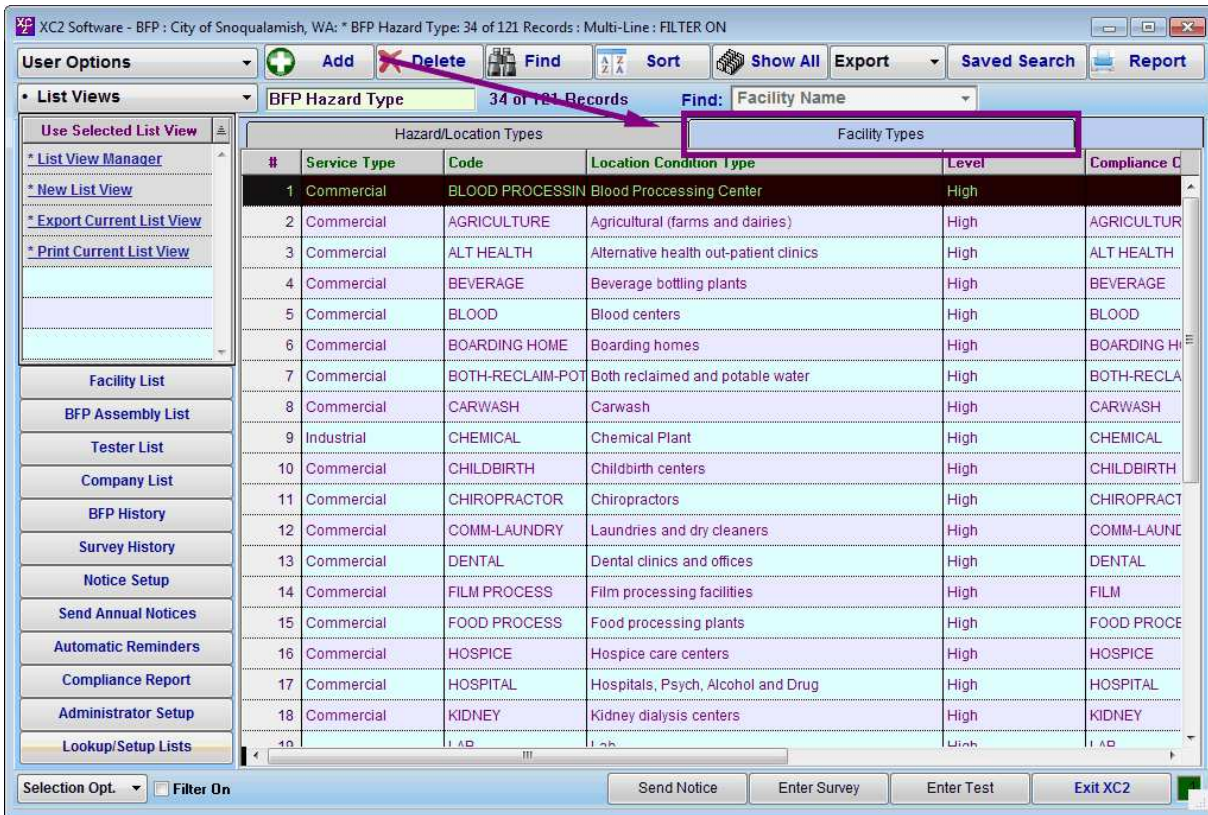
Selection Opt. Filter On Send Notice Enter Survey Enter Test Exit XC2

Notes:

What is a Facility Type?

A Facility Type is the type business occupying a space. Defining the Facility Type can be helpful in determining if a backflow preventer is needed. Common Facility Types Include

- Carwash
- Veterinary Office
- School
- Hospital
- Laboratory



Notes:

How to Find Hazard Types and Facility Types

Hazard Types and Facility Types are located under **View Setup Lists**

Click on Lookup Setup Lists

The screenshot shows the XC2 Software interface for the City of Snoqualamish, WA. The main window displays a list of Hazard/Location Types and Facility Types. The left sidebar contains a menu with the following items: Facility List, BFP Assembly List, Tester List, Company List, BFP History, Survey History, Notice Setup, Send Annual Notices, Automatic Reminders, Compliance Report, Administrator Setup, and **Lookup/Setup Lists** (highlighted with a purple box). A purple arrow points from the 'Lookup/Setup Lists' menu item to the table below.

#	Service Type	Code	Location Condition Type	Level	Compliance C
10	Commercial	CHILDBIRTH	Childbirth centers	High	CHILDBIRTH
11	Commercial	CHIROPRACTOR	Chiropractors	High	CHIROPRACTOR
12	Commercial	DENTAL	Dental clinics and offices	High	DENTAL
13	Commercial	FILM PROCESS	Film processing facilities	High	FILM
14	Commercial	FOOD PROCESS	Food processing plants	High	FOOD PROC
15	Commercial	HOSPICE	Hospice care centers	High	HOSPICE
16	Commercial	HOSPITAL	Hospitals, Psych, Alcohol and Drug	High	HOSPITAL
17	Commercial	KIDNEY	Kidney dialysis centers	High	KIDNEY
18		LAB	Lab	High	LAB
19	Commercial	COMM-LAUNDRY	Laundries and dry cleaners	High	COMM-LAUNDRY
20	Commercial	METALPLATE	Metal plating industries	High	METALPLATE
21	Commercial	MORGUE	Morgue and autopsy - Non-Hosp	High	MORGUE
22	Commercial	MORTUARY	Mortuaries	High	MORTUARY
23	Hospital	NURSING HOME	Nursing Home	High	NURSING HO
24	Commercial	OUT-PATIENT	Out-patient clinics and offices	High	OUT-PATIENT
25	Commercial	PETROLEUM	Petroleum processing or storage plants	High	PETROLEUM
26	Commercial	PIERS	Piers and docks	High	PIERS
27	Commercial	PSYCHIATRIC	Psychiatric clinics and offices	High	PSYCHIATRIC
28	Industrial	RADIOACTIVE	Radioactive Materials	High	RADIOACTIVE

Notes:

Click on BFP Hazard Types



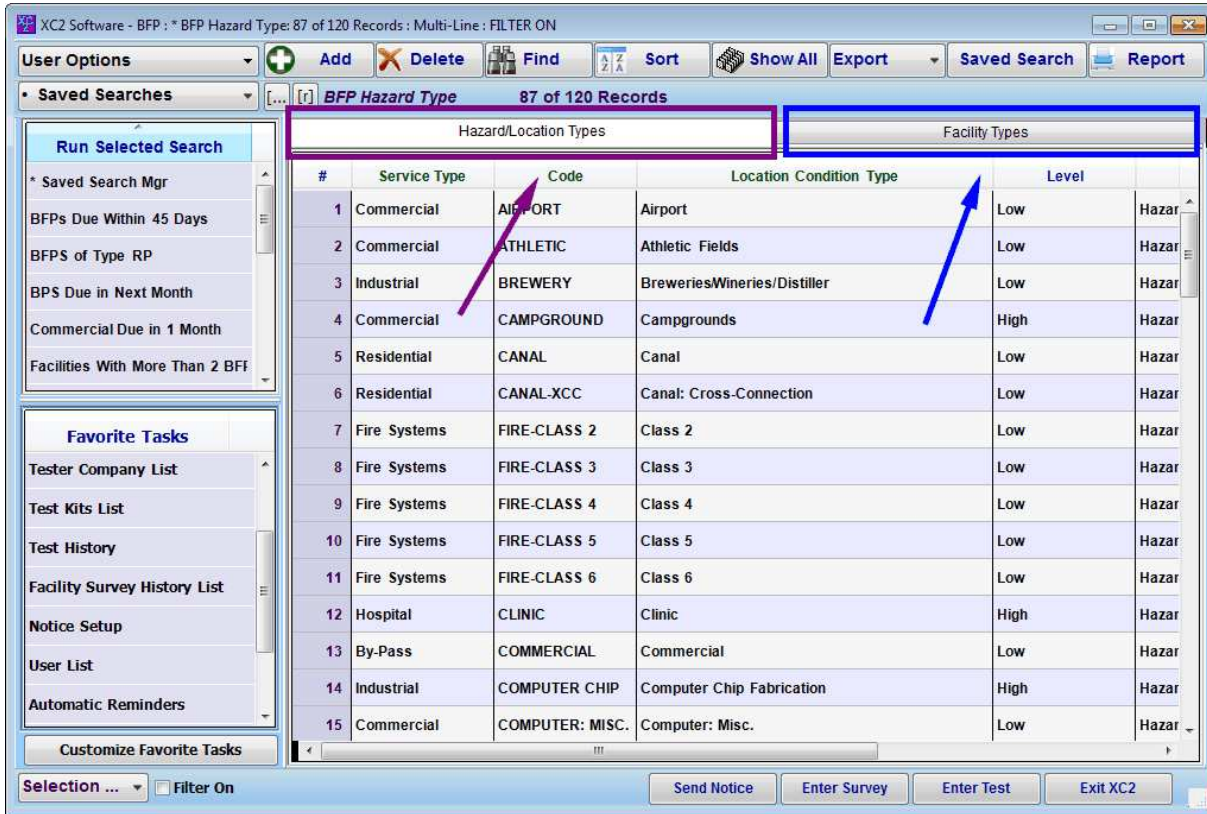
Notes:

List View Of Hazard Types and Facility Types

A list View of all Hazard Types or Facility Types will Appear within the Main Page.

If you want to view Hazard Types Click the Hazard Type Tab

If you want to view Facility Types Click the Facility Type Tab



Notes:

Creating a New Hazard/Facility Type

If you want to create a New Hazard or Facility Type Click the Add Button.

Note: It Does not matter what tab you are on

Entering Information

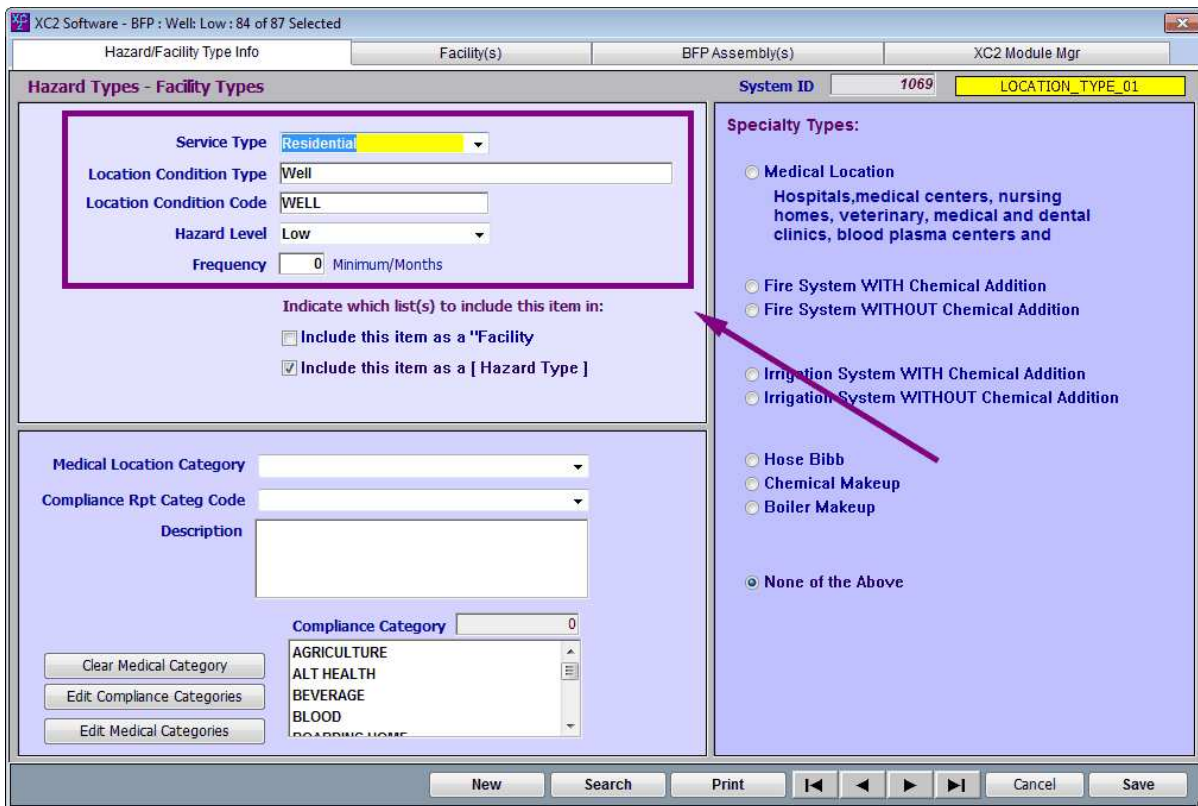
Once the assembly hazard/facility type window opens enter

Service Type

Location Condition Type: (the name of the facility/hazard type)

Location Condition Code: (a shorthand code for the name)

Hazard Level: (Not Required)



Notes:

Select What Type It is

The Record can be

- 1) A Hazard Type
- 2) A Facility Type
- 3) Both a Hazard Type and Facility Type

Check the Box or Boxes that describes the record

Click Save when done

Notes:



How to Manually add New Backflow Models in XC2

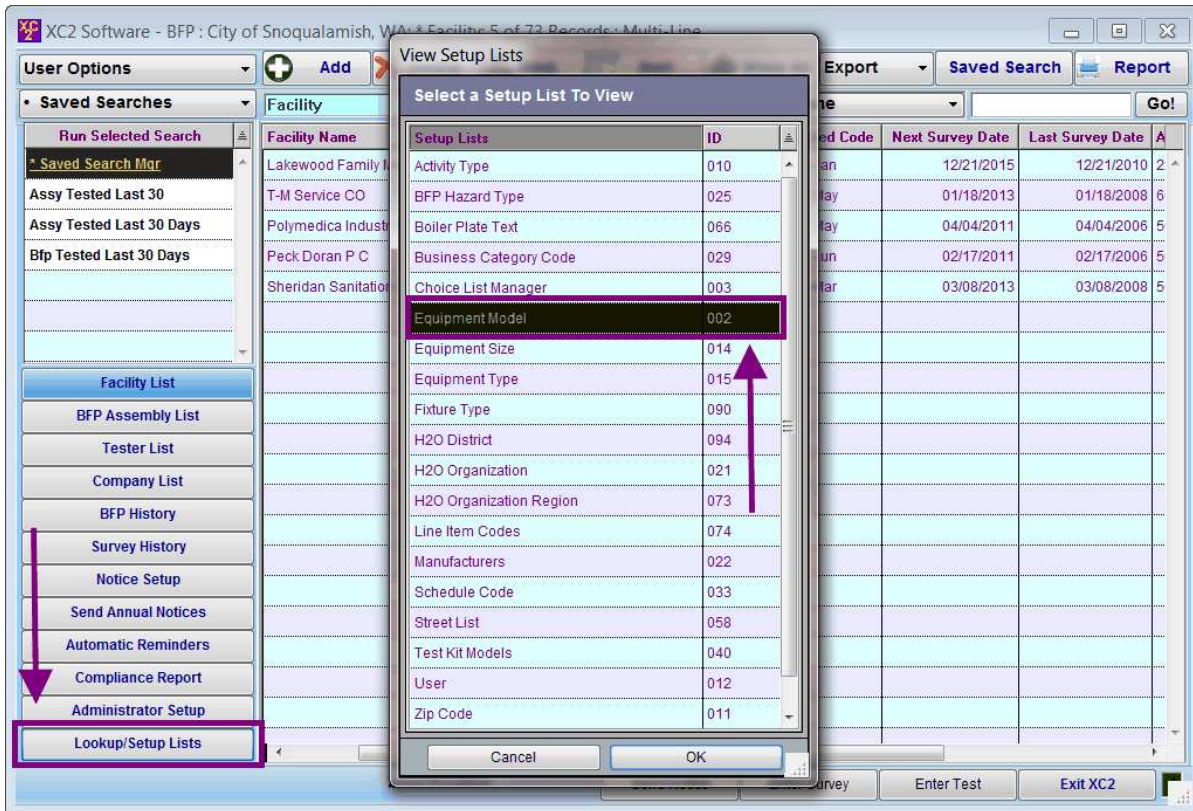
KB Asset ID: 2171

This page describes how to manually add a backflow model to your approved list in XC2

Open the Backflow Models List

Select Lookup / Setup Lists

Select Backflow Model



Notes:

Click Add

Click add to create a new Backflow Model Record

The screenshot shows the 'XC2 Software - BFP : City of Snoqualamish, WA: * Equipment Model: 801 of 801 Records : Multi-Line' window. The top toolbar contains buttons for 'Add', 'Delete', 'Find', 'Sort', 'Show All', 'Export', 'Saved Search', and 'Report'. The 'Add' button is highlighted with a red box, and a red arrow points to it from the left. Below the toolbar, there is a search bar with 'Equipment Model' selected and '801 of 801 Records' displayed. A 'Find:' dropdown menu is set to 'Facility Name'. The main area contains a table with the following columns: #, Manufacturer, Type, Model, Mod ID, Mfg ID, Type ID, and *. The table lists 32 records, with the first row (row 14) highlighted in black. The bottom of the window has buttons for 'Set Selection', 'Recall Selection', 'Send Notice', 'Enter Survey', 'Enter Test', and 'Exit XC2'.

#	Manufacturer	Type	Model	Mod ID	Mfg ID	Type ID	*
14	Watts	DC	007M2QT-VU	116728	61	18	*
15	Watts	DC	007M3FP	116729	61	18	*
16	Watts	DC	007M3QT	116730	61	18	*
17	Watts	DC	007M3QT-VU	116731	61	18	*
18	Watts	DC	007PCQT	116732	61	18	*
19	Watts	DC	007QT	116733	61	18	*
20	Watts	DC	007QT-VU	116734	61	18	*
21	Watts	DC	007SSM1PCQT	116735	61	18	*
22	Watts	DC	007SSM1QT	116736	61	18	*
23	Watts	DC	007SSPCQT	116737	61	18	*
24	Watts	DC	007SSQT	116738	61	18	*
25	Watts	SVB	008PCQT-VUH	117307	61	24	*
26	Watts	RP	009	117127	61	20	*
27	Watts	RP	009M1PCQT	117128	61	20	*
28	Watts	RP	009M1QT	117129	61	20	*
29	Watts	RP	009M2-FP	117130	61	20	*
30	Watts	RP	009M2PCQT	117131	61	20	*
31	Watts	RP	009M2QT	117132	61	20	*
32	Watts	RP	009M3-FP	117133	61	20	*

Notes:

Fill in Model information

Select

- 1) Manufacture
- 2) Model Code
- 3) Type
- 4) Model
- 5) Frequency Tested
- 6) Size
- 7) Select if Approved or not

Click Save when done

Equipment Model 117327 MODEL.2

Mfr: Apollo/Conbr Model Code: Whopper
 Type: DCDA
 Model: Whopper Frequency: 12 Mos.

Approved Sizes Add Size: Add Size Delete Size

Size Code	Display	ModelSizeCode	Approved	Date	Renewed	Parts Only	PB OK
0200	2"	Whopper	<input checked="" type="checkbox"/>	12/17/2013	00/00/0000	<input type="checkbox"/>	<input type="checkbox"/>

Duplicate This Model Do Not Delete During Models Update Process

New Search Print << < > >> Cancel Save

Notes:

Is This An Approved Model Size

Should The Model/Size Be On The Approved Device List

If the Backflow Model/Size IS NOT designated as approved

AND

The option in Administrator Preferences/Data Entry Prefs - Validate Approved Sizes is checked.

You will be prompted upon creating or editing a devise record that is not disgnated Approved.

Size Code	Display	ModelSizeCode	Approved	Date	Renewed	Parts Only	PB OK
0200	2"	Whopper	<input checked="" type="checkbox"/>	12/17/2013	00/00/0000	<input type="checkbox"/>	<input type="checkbox"/>
0300	3"	Whopper	<input type="checkbox"/>		00/00/0000	<input type="checkbox"/>	<input type="checkbox"/>

Notes:



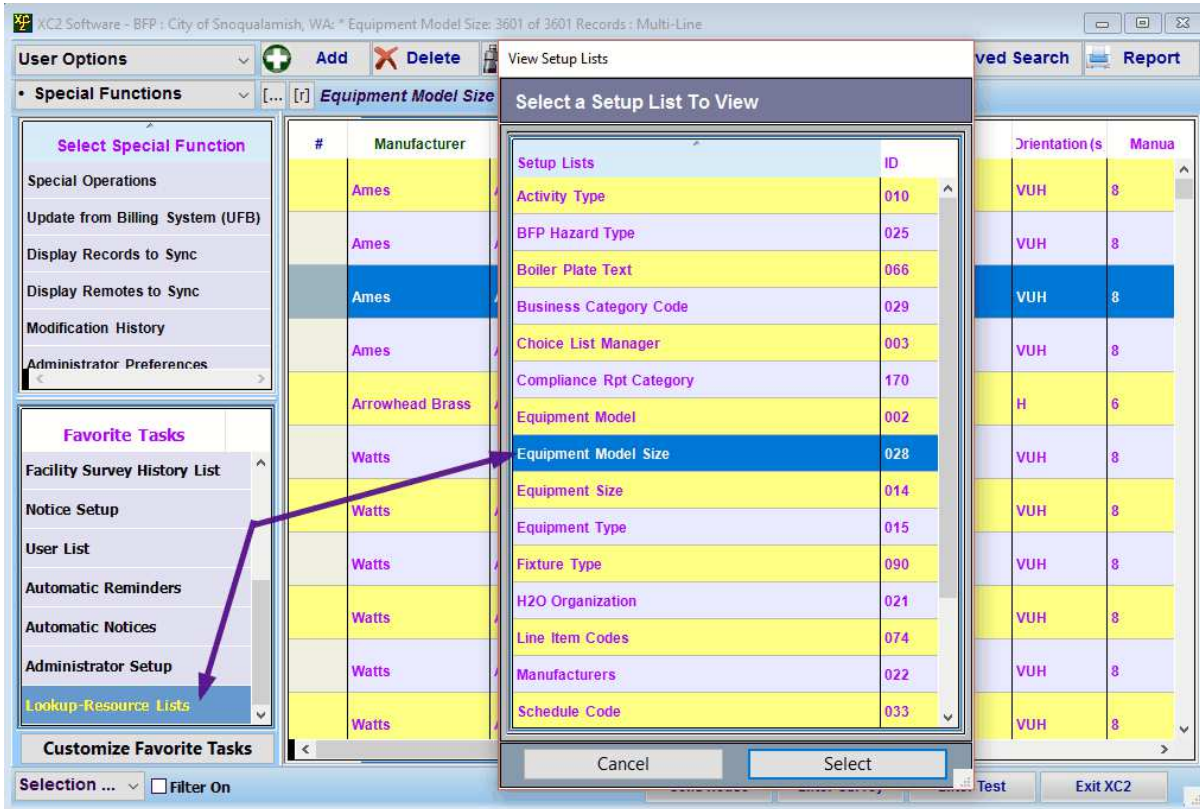
How To Add Backflow Model Sizes

KB Asset ID: 3526

Creating Backflow Model Sizes

Access Backflow Models Size List

- Look-Up Resource List
- Equipment Model Size



Notes:

Add New Size

Click the ADD button

The screenshot shows the XC2 Software interface for 'City of Snoqualamish, WA'. The window title is 'XC2 Software - BFP : City of Snoqualamish, WA: * Equipment Model Size: 3601 of 3601 Records : Multi-Line'. The interface includes a menu bar with 'User Options', 'Add', 'Delete', 'Find', 'Sort', 'Show All', 'Export', 'Saved Search', and 'Report'. Below the menu bar is a 'Special Functions' section with a dropdown menu and a search field. The main area contains a table with columns: '#', 'Manufacturer', 'Type', 'Model #', 'Size Code', 'Size', 'Orientation (s)', and 'Manua'. The table lists 11 records. A purple arrow points to the 'Add' button in the menu bar.

#	Manufacturer	Type	Model #	Size Code	Size	Orientation (s)	Manua
1	Ames	AVB	A100-VUH	0075	3/4"	VUH	8
2	Ames	AVB	A100-VUH	0100	1"	VUH	8
3	Ames	AVB	A100-VUH	0150	1 1/2"	VUH	8
4	Ames	AVB	A100-VUH	0200	2"	VUH	8
5	Arrowhead Brass	AVB	58	0050	1/2"	H	6
6	Watts	AVB	288AM3-VUH	0125	1 1/4"	VUH	8
7	Watts	AVB	288AM3-VUH	0150	1 1/2"	VUH	8
8	Watts	AVB	288AM3-VUH	0200	2"	VUH	8
9	Watts	AVB	288AM3-VUH	0250	2 1/2"	VUH	8
10	Watts	AVB	288AM3-VUH	0300	3"	VUH	8
11	Watts	AVB	288AM5-VUH	0075	3/4"	VUH	8

Notes:

Create Record

Enter all needed information

Equipment Model Sizes

MODEL_SIZE.2 1047281

Model 919QT Orientations

Type RP Manufacturer Watts

Size 6" 0600

Your Code 919QT

Approved Date 09/15/2015 Approved

Renewed Date 09/15/2017

Manual

Shut Offs

Spare Parts Only Meets PB Requirement < 0.25%

Meters

By Pass

Notes

New Search Print Orientation Key < < > > Cancel Save

Notes:

Should The Model Size Be On Approved List?

Should The Model/Size Be On The Approved Device List

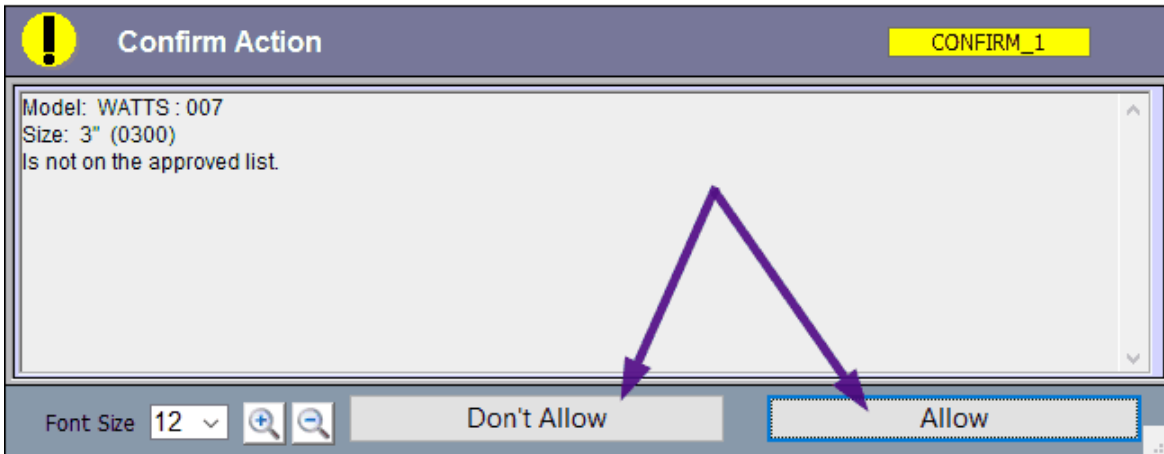
If the Backflow Model/Size IS NOT designated as approved

AND

The option in Administrator Preferences/Data Entry Prefs - Validate Approved Sizes is checked.

You will be prompted upon creating or editing a devise record that is not disignated Approved.

Confirm Action



Notes:



How to Add New Equipment Manufacturers

KB Asset ID: 2069

How to Manually Add New Equipment Manufacturers

Lookup/Setup Lists

The Manufacturer List Can be found in Lookup/Setup Lists

Select Manufacturer to open

The screenshot shows the XC2 software interface. At the top, there are menu options: Add, Delete, Find, Sort, Show All, Export, Saved Search, and Report. Below this is a 'Reports' section with a dropdown menu for 'Manufacturers' showing '32 of 60 Records'. A search field labeled 'Find: Facility Name' is present. The main area displays a table of manufacturers:

#	Equipment Mfr	Mfr Code
1	Ames	
2	Apollo/Conbraco	
3	ARI	
4	Arrowhead Brass	
5	Badger	
6	Bissel	
7	Braukmann	
8	Buckner	
9	C.M.B.	
10	Cash Acme	
11	Champion Brass	
12	Cla-Val	
13	Conbraco	
14	Crane	
15	Febco	
16	Flomatic	
17	Hersey/Grinnell	
18	Kennedy	
19	Lawler	
20	Mueller	
21	Neptune	
22	Orion	
23	Rain Bird	
24	Richwell	Rich
25	Rockwell	Rock
26	Sinner	Sinner

Overlaid on this is a 'View Setup Lists' dialog box titled 'Select a Setup List To View'. It contains a table of setup lists:

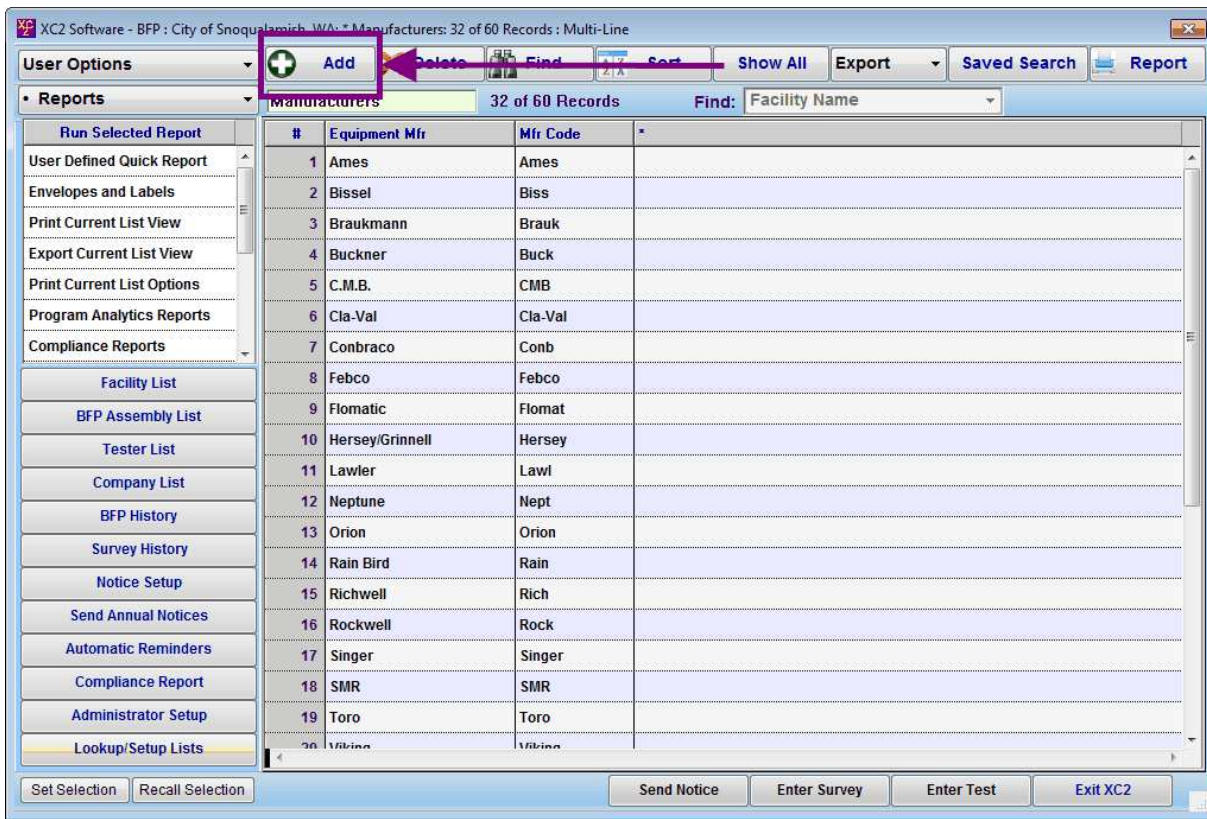
Setup Lists	ID
Activity Type	010
BFP Hazard Type	025
Boiler Plate Text	066
Business Category Code	029
Choice List Manager	003
Equipment Model	002
Equipment Size	014
Equipment Type	015
Fixture Type	090
H2O Organization	021
Line Item Codes	074
Manufacturers	022
Schedule Code	033
Street List	058
Test Kit Models	040
User	012
Zip Code	011

At the bottom of the main interface, there are buttons for 'Send Notice', 'Enter Survey', 'Enter Test', and 'Exit XC2'. On the left side, there is a 'Reports' menu with various options. The 'Lookup/Setup Lists' option at the bottom of this menu is highlighted with a red box, and a red arrow points from this option to the 'Manufacturers' entry in the 'View Setup Lists' dialog box.

Notes:

The Manufacturer list should populate.

Click Add to Add a New Manufacturer



Notes:

Add all information

The screenshot shows a software window titled "XC2 Software - BFP : New Record For: : Manufacturers". The window contains a form for adding a manufacturer and a table of models.

Manufacturers System ID: 100180

Mfr: BUMBLE BEE
Manufacturer Name: BUMBLE BEE

Type	Model Number
RP	U20
DCDA	C40

Buttons: Module Manager, Add Model, Delete Model

Footer: MFR.2, New, Search, Print, Navigation arrows, Cancel, Save

Notes:



XC2 Software Knowledge Base



Adding New Test Kit Models

KB Asset ID: 2656

By default, XC2 has a variety of Test Kit Models Pre Loaded into XC2. If you find a model that is not currently Loaded, you may add a Test Kit record manually.

Adding a Test Kit

You can add a New Test Kit Model through the Resources menu.

Click Lookup/Setup Lists

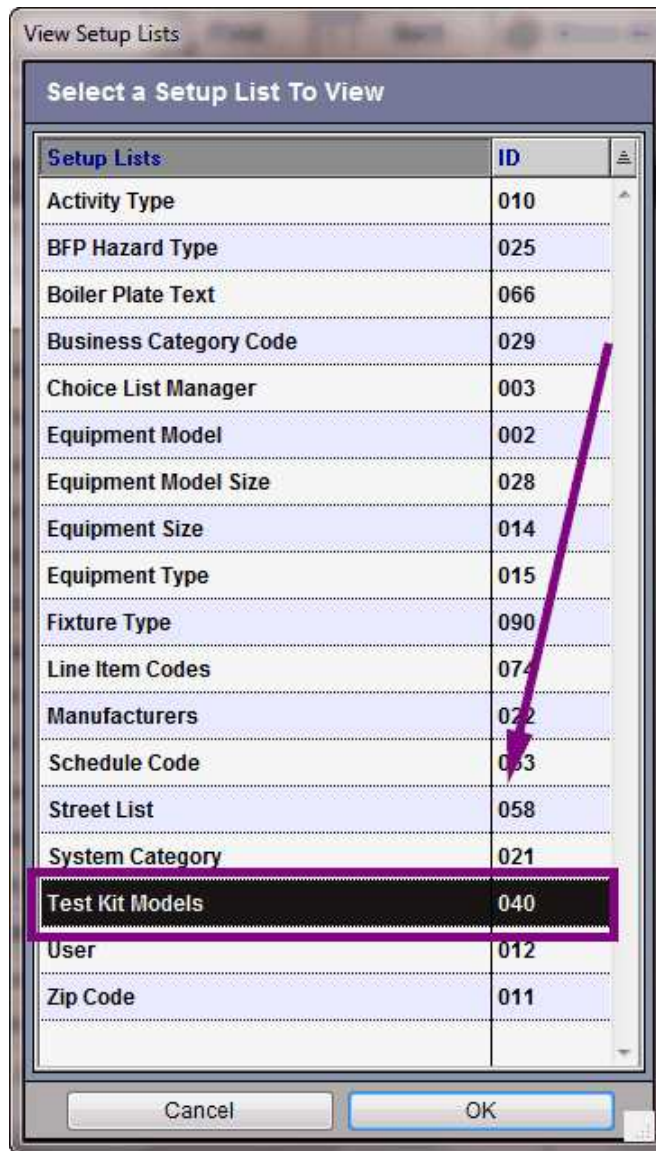
The screenshot shows the XC2 software interface. The main window displays a table of facilities with columns for #, Facility Name, Sub Div, Service Address, and another Service Address. The table contains 20 rows of data. On the left side, there is a sidebar menu with various options. The 'Lookup/Setup Lists' option is highlighted with a red box and a red arrow points to it. The top of the window has a menu bar with options like Add, Delete, Find, Sort, Show All, Export, Saved Search, and Report. Below the menu bar, there are search and filter options.

#	Facility Name	Sub Div	Service Address	Service Address
1	Bogus		99999 Test Street Name	San Francisco
2	BRONGA, NICOLE	DUNHILL UNIT 1	111 DALTON DR	Oviedo
3	MILLER, PATRICIA	HYDE PARK	3177 BATTERSEA WAY	Winter Park
4	ECHVARRIA, ALMA	BELLE MEADE UNIT 2	4011 GALLAGHER LOOP	Casselberry
5	PIPER, JEFFREY & KIMBERLY	TUSKA RIDGE UNIT 3	1174 HOLLOW PINE DR	Oviedo
6	GUERRIERI, JANET	WYNTREE	733 PRESERVE TER	Lake Mary
7	BAERENKLAU, ALAN	BURLINGTON OAKS	1633 KERSLEY CIR	Lake Mary
8	GIEDD, BRAD S	BALLENTYNE	3626 SUPREME CT	Apopka
9	MESSNER, STEPHEN & SUSAN	ESTATES AT ALOMA WOODS PH 2	5712 OAK LAKE TRL	Oviedo
10	BERMAN, KELLY	BERINGTON CLUB PH 3	331 SAVANNAH HOLLY LN	Sanford
11	VOORHEES JR. DELLOYD	LAKE FOREST SEC 6A	5408 FAWN LAKE CT	Sanford
12	WHITTMER, SCOTT M		1550 BAYWATER CT	LAKE MARY
13	ROBERTS, WAYNE DOUG	HARBOUR LANDING	3016 HARBOUR LANDING WAY	Casselberry
14	JONES, JACQUELINE A	AMBERWOOD UNIT 1	1560 SUGARWOOD CIR	Winter Park
15	MCKINNEY, DANIEL J	DEER RUN UNIT 15	4248 FOX HOLLOW CIR	Casselberry
16	LESTER, CONNIE L.	DUNHILL UNIT 1	147 DALTON DR	Oviedo
17	LUDEWIG, CARL & DEBRA	DUNHILL UNIT 2	490 MOFFAT LOOP	Oviedo
18	BANKS, DONALD C	HOWELL ESTATES REPLAT	1043 MANCHESTER CIR	Winter Park
19	SAYAVONG, MONA MARIA	HOWELL ESTATES 1ST ADD	1056 MANCHESTER CIR	Winter Park
20	MCSWEENEY, JAMES	HOWELL COVE 3RD SEC	3516 SEAFORD LN	Casselberry

Notes:

Test Kit Models

Double Click Choice Test Kit Models

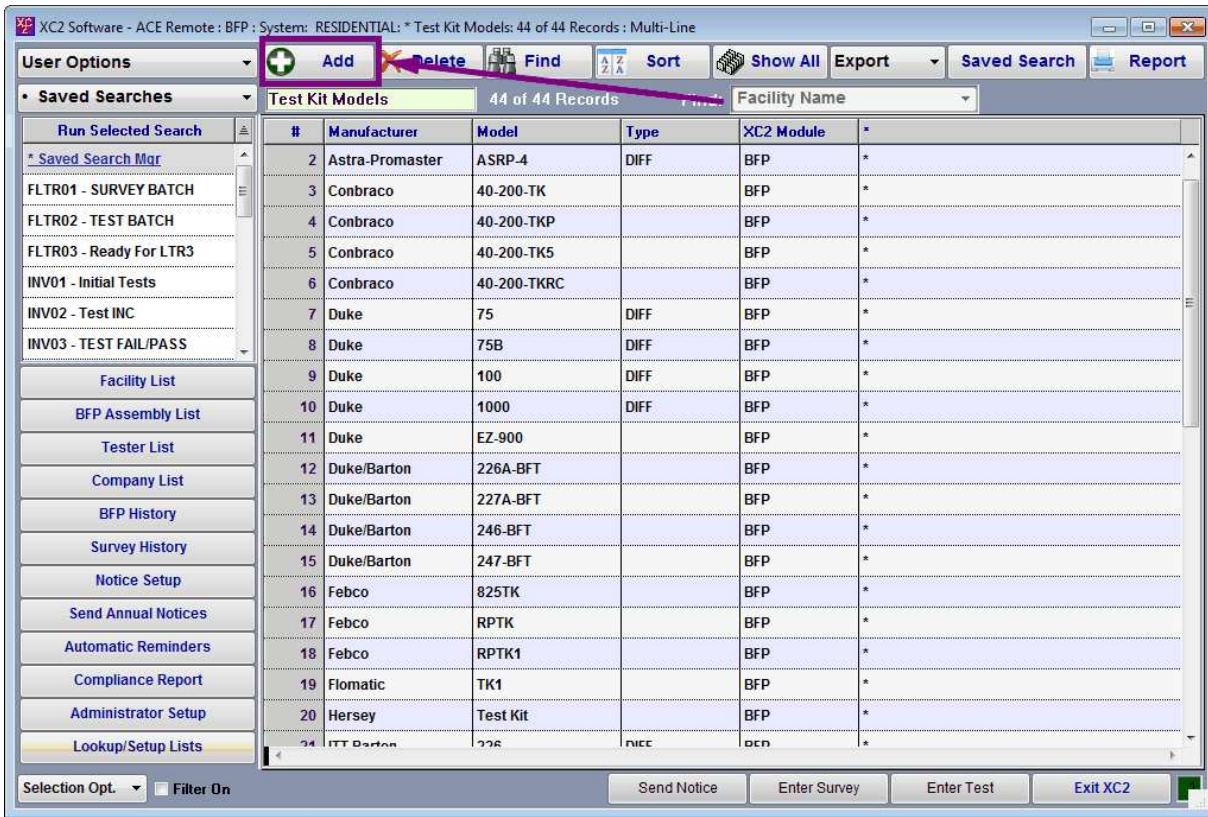


Notes:

List View of Test Kit Models

A List View of all Test Kit Models will appear as a List View

To Add a New Model click Add



Notes:

New Model

After Clicking Add a Blank test kit records will appear

- Choose a Manufacture
- Model
- Type
- Comments

XC2 Software - BFP : New Record For: : Test Kit Models

Test Equipment Models N° 100049 TESTKITMOD.01

Manufacturer		Model	
Type		<input checked="" type="radio"/> Mechanical <input type="radio"/> Electronic	
	XC2 Module	BFP	

Comments

Duplicate

New Search Print |< < > >| Cancel Save

Notes:



How To Create Boilerplates

KB Asset ID: 2048

Page describes what Boilerplates do and how to create them in XC2

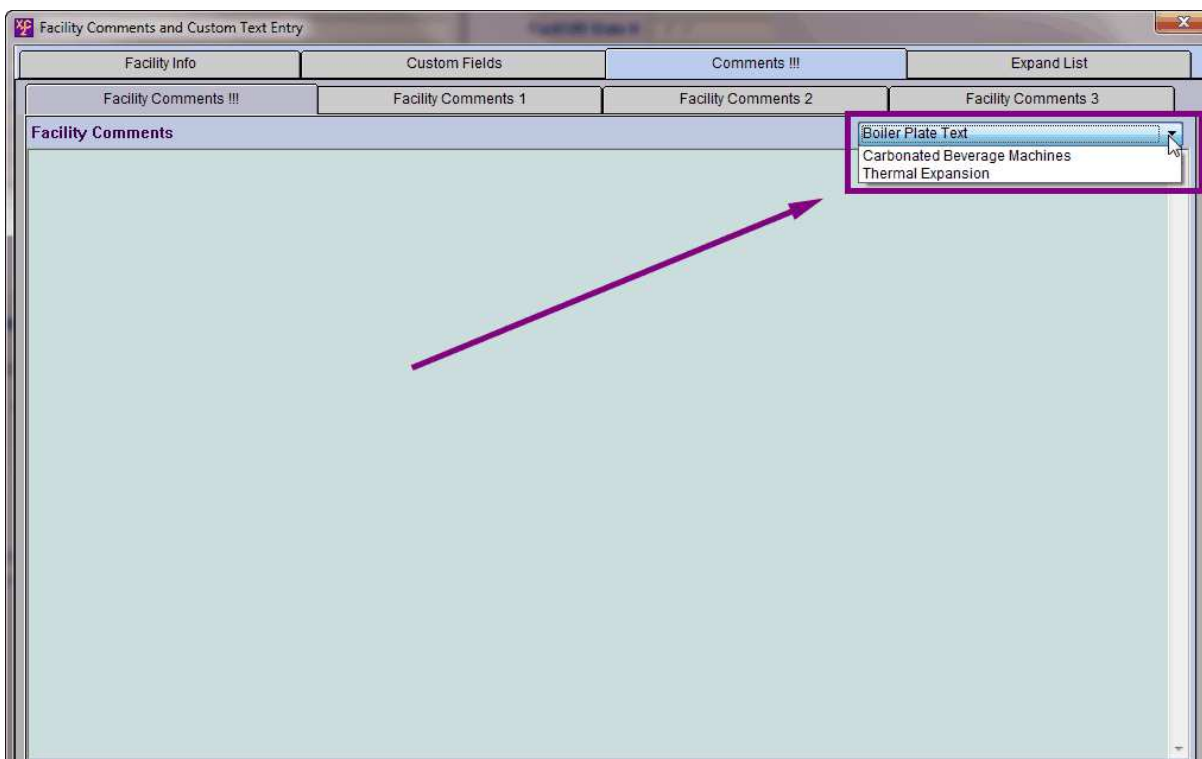
What is a Boilerplate?

A Boilerplate is an often-used piece of text that is saved and then used to quickly enter information in XC2

The picture below illustrates the Boilerplate pull-down menu in XC2

Areas Where Boilerplates are Available:

- Survey Comments
- Survey Deficiency
- Survey Recommendations
- Survey Corrections
- Survey Item Comments
- Test Comments
- Repair Comments
- Facility Comments
- BFP Assembly Requirements
- Work Orders
- Testers Comments
- Test Kit Comments
- Letters
- All Areas



How to Create a Boilerplate

You can create Boilerplates within the View Setup Lists area in XC2

From the Main Screen

- Click on Lookup/Setup Lists

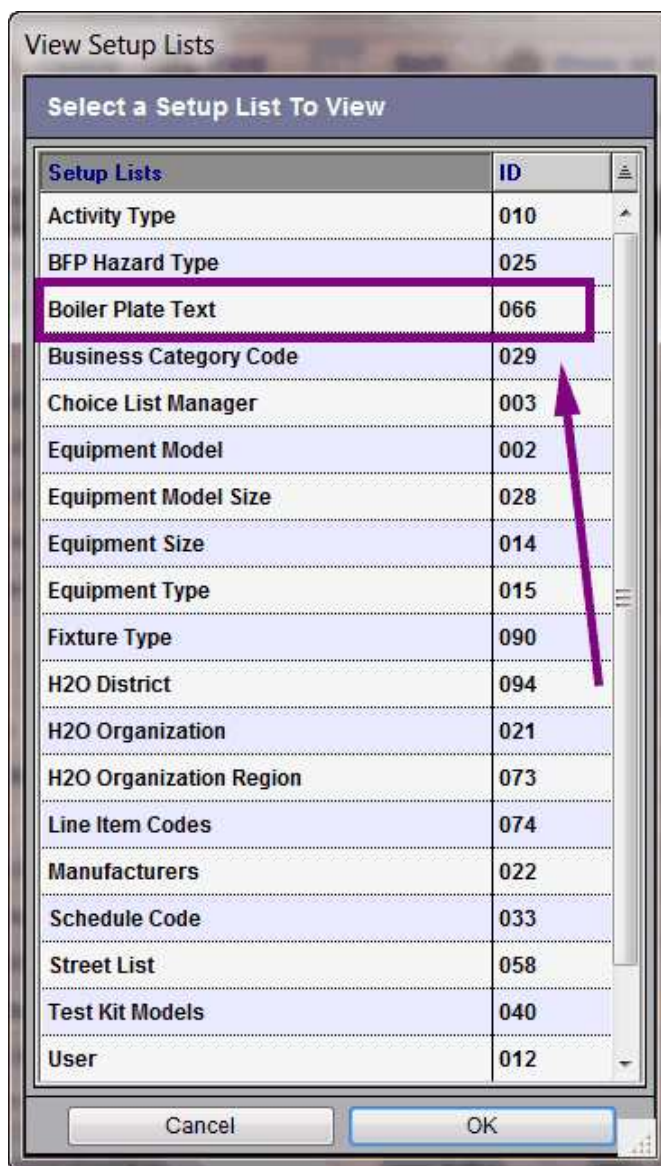
The screenshot shows the XC2 Software interface for BFP: City of Snoqualamish, WA. The window title is "XC2 Software - BFP : City of Snoqualamish, WA: * Facility: 122 of 124 Records : Multi-Line". The interface includes a toolbar with options like Add, Delete, Find, Sort, Show All, Export, Saved Search, and Report. Below the toolbar, there's a "List Views" section with a search filter for "Facility" and "122 of 124 Records". A table displays a list of facilities with columns for #, Facility Name, Addr (#), Street, Acct Number, Site Qty, and Tap Num. A left-hand menu contains various options, with "Lookup/Setup Lists" highlighted by a purple box and a purple arrow pointing to it.

#	Facility Name	Addr (#)	Street	Acct Number	Site Qty	Tap Num
4	Arms of Christ Tabernacle	6421	Otterbein	08-023342-001		08-023342-00
5	Autospa Car Wash	8147	Chasely	04-028859-001		04-028859-00
6	Bard's Blues	4358	Tavistock	01-012617-001		01-012617-00
7	Big Ez B.P. Station	3219	Sarbury	06-020198-003		06-020198-00
8	Billybob's Burgers	123	Main Street			
9	Billybob's Donuts and Ice Cream	8014	Pearl	04-026210-001	1	04-026210-00
10	Billybob's Super Bbq	8888	Billybob			
11	Blimpie / Elm St	9023	Brindle	37723426	1	37723426
12	Blue Moon Diner	8389	Executive		1	
13	Bogus	123	Main			
14	Bogus	123	Main			
15	Bojangles	5224	Rockbourne		1	
16	Bubbba's Bbq	456	Main		1	
17	Captain D	6097	Palmer	02-014018-002	2	02-014018-00
18	Checkers Drive in Rest Inc	6913	Gypsum	04-016312-001	2	04-016312-00
19	Chevron Food Mart	1172	Charterhouse			
20	Chicago's Billiards	1944	Pennycress		2	
21	Chick-N-Run	9219	Pine Ridge	06-029891-001	1	06-029891-00
22	Church's Chicken	2965	Paddock	04-016264-002	1	04-016264-00
23	Community Tire	8328	Old Oak	02-043609-007	4	02-043609-00

Notes:

Selecting Boilerplate Entry

Select Boilerplate Text

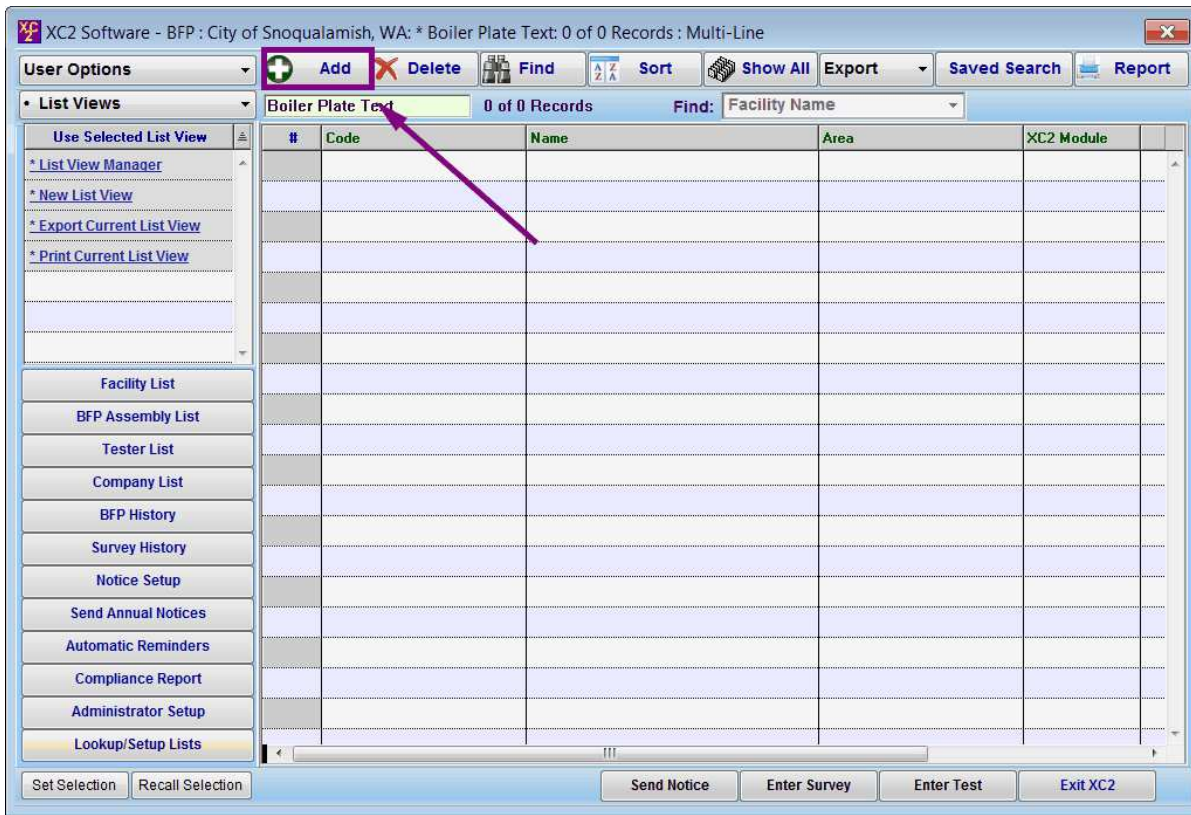


Notes:

Adding New Boilerplate

From the Boilerplate Table

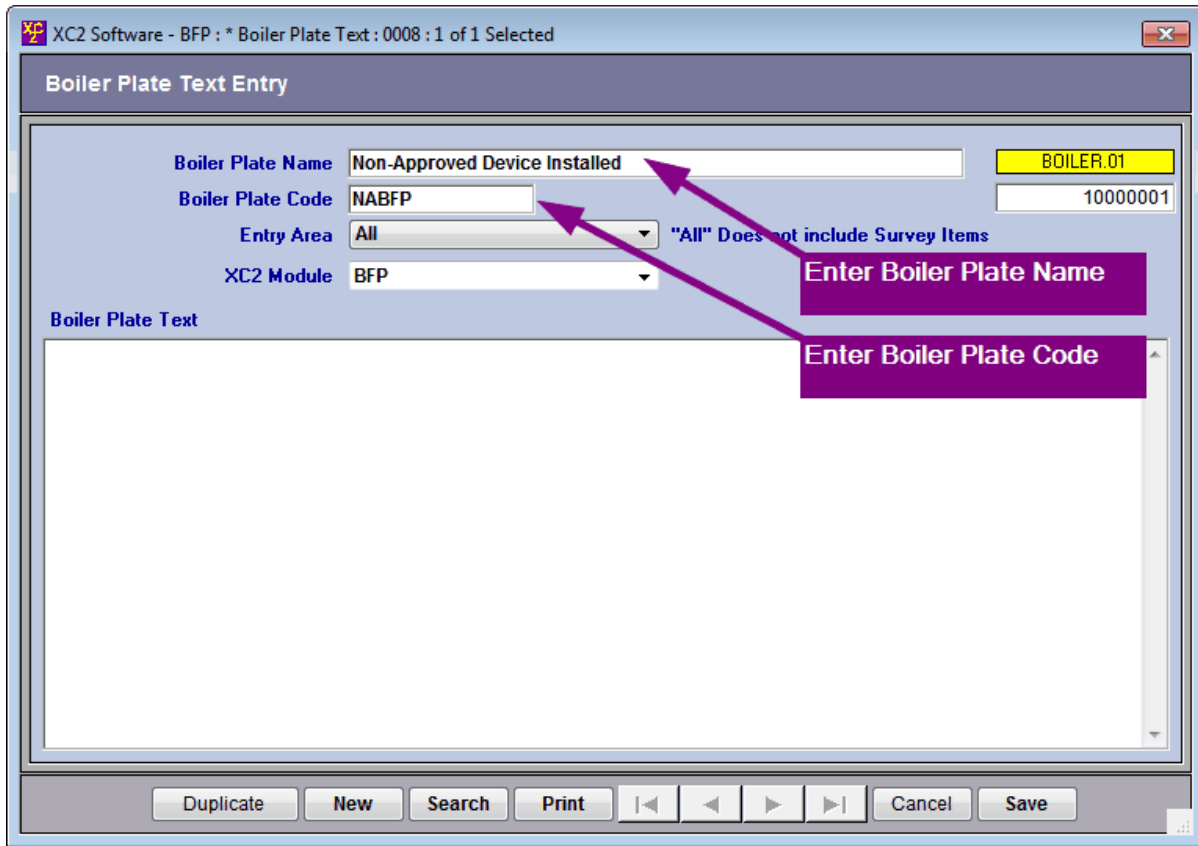
- Click the Add button



Notes:

Naming your Boilerplate

- Give your Boilerplate a descriptive name and code



Notes:

Enter Your Boilerplate Text

- Select the area of XC2 where you want the Boilerplate to be available
- Enter your Boilerplate text
- Click Save when finished

XC2 Software - BFP : New Record For : Boiler Plate Text

Boiler Plate Text Entry

Boiler Plate Name: Non-Approved Device Installed BOILER.01

Boiler Plate Code: NABFP 10000129

Entry Area: Test Comments "All" Does not include Survey Items

XC2 Module: BFP

Boiler Plate Text

This is a Non-Approved device - Replacement is Required

Buttons: Duplicate, New, Search, Print, Navigation, Cancel, Save

Notes:

Boilerplate Available

Your new Boilerplate is now available for selection in the area of XC2 specified

XC2 Software - BFP : Location ID: : REDDING EQUIPMENT CO : Assembly ID : 2001128 : RP : Last Test: 11/4/2011 : PASS : 08/29/2013

BFP Search

Search Field: Equipment Serial Num Search Value: 142299

Assembly ID: No: 2001128 Last Test Date: 11/04/2011 Mfr: Watts Serial Number: 142299

Facility: REDDING EQUIPMENT CO Type: RP Size: 2" Model: 919QT-VD

Address: 2230 S VINMAR WAY - SNOQUALAMISH Location:

10th USC Edition	Check Valve #1	Check Valve #2	Relief Valve	Shut-Off #1 & #2
Initial Test <input type="checkbox"/> 2 <input type="checkbox"/> 10th USC Edi	Held At: 6.5 <input checked="" type="checkbox"/> Closed Tight <input type="checkbox"/> Leak <input type="checkbox"/> Failed <input type="checkbox"/> Cleaned	<input checked="" type="checkbox"/> Closed Tight <input type="checkbox"/> Leak <input type="checkbox"/> Failed <input type="checkbox"/> Cleaned	Opened At: 3.2 <input type="checkbox"/> Did Not Open <input type="checkbox"/> Cleaned 3.3 <input type="checkbox"/> Leaked <input type="checkbox"/> Failed	Closed: <input type="checkbox"/> <input type="checkbox"/> Leaked: <input type="checkbox"/> <input type="checkbox"/> Cleaned: <input type="checkbox"/> <input type="checkbox"/>

Tester: Initial Tester Name: VINCENTE PERRY Pass/Fail: Pass Date: 08/29/2013

Comments: **Boiler Plate Text** (highlighted with a purple arrow)
 This is a Non-Approved device - Repla Non-Approved Device Installed

History UD 01: _____
 History UD 02: _____

Test Report Options View History Signature

Test Code: PASS

Charges: Initial _____
 Final _____
 Repair _____
 Parts _____
 Totals _____
 Don't Calculate

Entry Information Line Items Edit Device Info XC2 Picts Save & Print Save & Done Cancel Save & New

Notes:



XC2 User Manual

Choice List Manager

- **Choice List Manager Overview**
- **Free Form Entry vs Pull Down**
- **Equipment Status**
- **Facility Status**
- **Map Page**
- **Personnel/Tester Status**
- **Service Types**
- **Test Kit Manufacturers**



XC2 Software Knowledge Base



Choice List Setup

KB Asset ID: 2661

This Page describes where you can access your Choice Lists and how to customise each type of list.

What are Choice Lists?

Choice lists are most commonly seen as Pull-down menus in XC2. Most pull-down menus can be rearranged or changed in XC2.

Choice list Example: Below I am showing the Service Type Pull-down Menu in a Facility Record. Service Type is a Choice List that can be Rearranged or Modified in the Choice List Manager.

XC2 Software - BFP : Facility : Tafoya Electric : 1795 S Church View CT : 11 of 76 Selected

Facility Info | Custom Fields | Comments | Expand List

Facility Information | Mailing Addresses | Owner Addresses | Property Manager

Facility Address Info | XC2 Facility ID No: 151

Facility Name: Tafoya Electric

Facility Name 2:

Service Addr.: 1795 S Church View CT

Addr. 2: | Addr. Unit:

City ST Zip: Snoqualamish | State: WA | Zip: 98215

Contact Name: Barry | Last: Young

Position: | Cell: (696) 233-9525

Phone: (696) 235-0733 | Ext: | Emerg Phone:

E-Mail Address:

XC2 Facility ID No: 151

H2O_System:

Location ID: 151

PIN:

Acct Number: 7281-000 | Seq:

Parcel Number: 00360

Next Survey Date: 08/02/2011 | Freq. (mos.): 60

Schedule Code: 05-May

Map Page:

Service Type: [Dropdown Menu]

Facility Type: Residential

Facility Status: Commercial

Color: Fire Systems

BFP Assembly List: Sewage, TownHomes/Condos, Hospital, By-Pass

Assigned Inspector:

Auth. Tester Company:

SIC Code:

Rate Code:

Address Options | Update Options | Meter & GPS Info

#	Hazard Type	Size	Mfr	Next Test	Last Test	Active	Count	Status	Service Address	Equip L
1	Injector, Fertilizer	608656	DCDA	2"	Watts	05/25/2014	05/14/2011	Y	Installed	1795 S Church View CT

Quick Test Entry | Enter New Test | New BFP Assembly | Send Notice | Delete Item | View BFP Assembly | Expand List

Pictures/Site Map | MapQuest | Qty BFP: 1 | Add Facility | Search | Report/Print | Cancel | Save

Notes:

Lookup/Setup Lists

Click Lookup/Setup Lists

The screenshot shows the 'XC2 Software - BFP : City of Snoqualamish, WA: * Facility: 76 of 76 Records : Multi-Line' window. The interface includes a top toolbar with 'Add', 'Delete', 'Find', 'Sort', 'Show All', 'Export', 'Saved Search', and 'Report'. Below this is a search bar for 'Facility Name' and a 'Go!' button. The main area is a table with columns: #, Facility Name, Rate Code, User Defined Alp, Addr (#), Street, Site Qty, Sched Cod, and Next Surve. The table lists 29 facilities, with the first few being: 11 Tafoya Electric, 12 Taylors Liquors, 13 North Star Liquor, 14 LA Salle Partners, 15 Screenplay Video Centers, 16 Willie's Place, 17 Graphic Designees, 18 World Computer Corporation, 19 Specialty Systems, 20 Mercer William M Incorporated, 21 Sears J. & Associates Real Estate, 22 Lama Ventures, 23 Midwest Sales CO, 24 A Tag House, 25 Riley Income Tax Service, 26 Redding Equipment CO, 27 Resolution Trust Corp, 28 Rains-Flo Packings, and 29 Weber Management Company. On the left sidebar, there is a 'Facility List' section with buttons for 'BFP Assembly List', 'Tester List', 'Company List', 'BFP History', 'Survey History', 'Notice Setup', 'Send Annual Notices', 'Automatic Reminders', 'Compliance Report', 'Administrator Setup', and 'Lookup/Setup Lists'. The 'Lookup/Setup Lists' button is highlighted with a red rectangular box. At the bottom of the window, there are buttons for 'Send Notice', 'Enter Survey', 'Enter Test', and 'Exit XC2', along with checkboxes for 'Filter On' and 'Filter Facilities w/out Backflow'.

#	Facility Name	Rate Code	User Defined Alp	Addr (#)	Street	Site Qty	Sched Cod	Next Surve
11	Tafoya Electric			1795	Church View	1	05-May	08/0
12	Taylors Liquors			445	Perkins	1	01-Jan	07/0
13	North Star Liquor			7698	Hunters	1	04-Apr	
14	LA Salle Partners			5622	Sterling Glen	1	02-Feb	03/0
15	Screenplay Video Centers			7805	Archer	1	11-Nov	
16	Willie's Place			8488	Strathmoore	1	11-Nov	02/0
17	Graphic Designees			9044	Kelsey	1	12-Dec	11/0
18	World Computer Corporation			7816	Yankee	1	02-Feb	11/0
19	Specialty Systems			785	Wallsend	1	05-May	05/0
20	Mercer William M Incorporated			5707	Chatham	1	01-Jan	02/0
21	Sears J. & Associates Real Estate			7323	Fairway	1	08-Aug	
22	Lama Ventures			2941	Adara	1	12-Dec	03/0
23	Midwest Sales CO	Yess		4557	Frank	1	02-Feb	04/0
24	A Tag House			1583	Kim	3	09-Sep	04/0
25	Riley Income Tax Service			1710	Liberty	1	01-Jan	04/0
26	Redding Equipment CO			2230	Vinmar	1	10-Oct	10/0
27	Resolution Trust Corp			1905	Hillyer	1	08-Aug	11/0
28	Rains-Flo Packings			5102	Clark-Shaw	1	12-Dec	
29	Weber Management Company			6679	Cross Creek	1	04-Apr	03/0
30	Mr Smith's Restaurant			4370	Robin Hood	1	08-Aug	04/0

Notes:

Double Click Choice List Manager



Notes:

Setup Choice Lists

The Left portion of the screen contains all of the Choice Lists you are able to edit and the right portion of the screen contains the items currently available in the Choice list

Here I am Selecting Service Type.

Select the Choice List that you would like to edit and then type the Items name on the bottom of the screen, click add item if you would like to add the item.

When complete click done and the Ites within the choice lists will be saved

Other Choice lists includes

- Equipment Status
- Facility Status
- User Defined Fields

Choice List Manager

Maximum Length: 30

Choice List Name (Click Item)	Module
Project Contractor Type	UNIV
Project Document Type	UNIV
Project Notes Type	UNIV
Protection Type	Bfp
Rate Code	UNIV
Service Address City	UNIV
Service Address Pre Direction	UNIV
Service Address Suffix	UNIV
Service Type	UNIV
Special Formatting	UNIV
Survey Item 01	BFP
Survey Item 02	BFP
Survey_Status_Subcode	Bfp
Test Kit Calibrated By	Bfp
Test Kit Manufacturer	Bfp
UD Alpha 40 01	BFP
UD Alpha 40 02	BFP
UD Alpha 40 03	BFP

Choice List Items

- Residential
- Commercial
- Fire Systems
- Industrial
- Miscellaneous
- Sewage
- TownHomes/Condos
- Hospital
- By-Pass

Buttons: New Item, Insert Item, Delete Item, Delete All Items

Style: <<< All Caps, <<< Upper Lower

Enter Item Text: Residential

Buttons: Import, Cancel, Done/Save

Notes:



XC2 Software Knowledge Base



Choice List - Free Form or Pull Down Entry

KB Asset ID: 3525

Many of the Choice List and User Defined fields can be used as Free Form data entry or populated to act as Pull-Down containing a user populated list.

Field Selection

In this example, I am using a User Defined (UD) field in a facility record.

XC2 Software - BFP : Facility : Bill's Balloon Bonanza : 1111 Helium Way : 1 of 76 Selected

Facility Info Custom Fields Comments Expand List

Facility Information Mailing Addresses Owner Addresses Property Manager

Facility Address Info XC2 Facility ID No: 100412

Facility Name: Bill's Balloon Bonanza

Facility Name 2:

Service Addr.: 1111 Helium Way

Addr. 2: Addr. Unit:

City ST Zip: San Rafael State CA Zip 94901

Email Notices

Contact Name: Bill Last: Banana

Position: Blow Hard Cell:

Phone: Ext: Emerg Phone:

E-Mail Address: banana@fullofhotair.com

XC2 Facility ID No: 100412

H2O_System: Farmingdale Metro Water

Location ID:

Customer Code: QCPU-4657 For Customer

Tester Code: UDRV-1175 For Tester

Group Code: Edit Code

Acct Number: Seq:

Parcel Number:

Last Survey Date: 04/03/2014 Freq. (mos.): 0

Next Survey Date: 04/03/2015 FACILITY_06.1

Schedule Code:

Map Page:

Service Type: Commercial

Facility Type: Manufacturing

Facility Status:

Facility UD 1:

Assigned Inspector:

Auth. Tester Company:

SIC Code:

Rate Code:

Address Options

Update Options

Meter & GPS Info

[...] [r] BFP Assembly List BFP Assembly History Letter History Surveys/Inspections All Devices Facility Areas

#	Hazard Type	Serial Num	Type	Size	Mfr	Next Test	Last Test	Active	Count	Status	Service Address	Equip Location

Quick Test Entry Enter New Test New BFP Assembly Send Notice Delete Item View BFP Asse... Expand List Exclude Inactive

Pictures/Site Map Google Maps Qty BFP: 0 Add Facility Search Report/Print Cancel Save

Notes:

Free Form Data Entry

By default, this field is setup to be used as Free Form data entry.

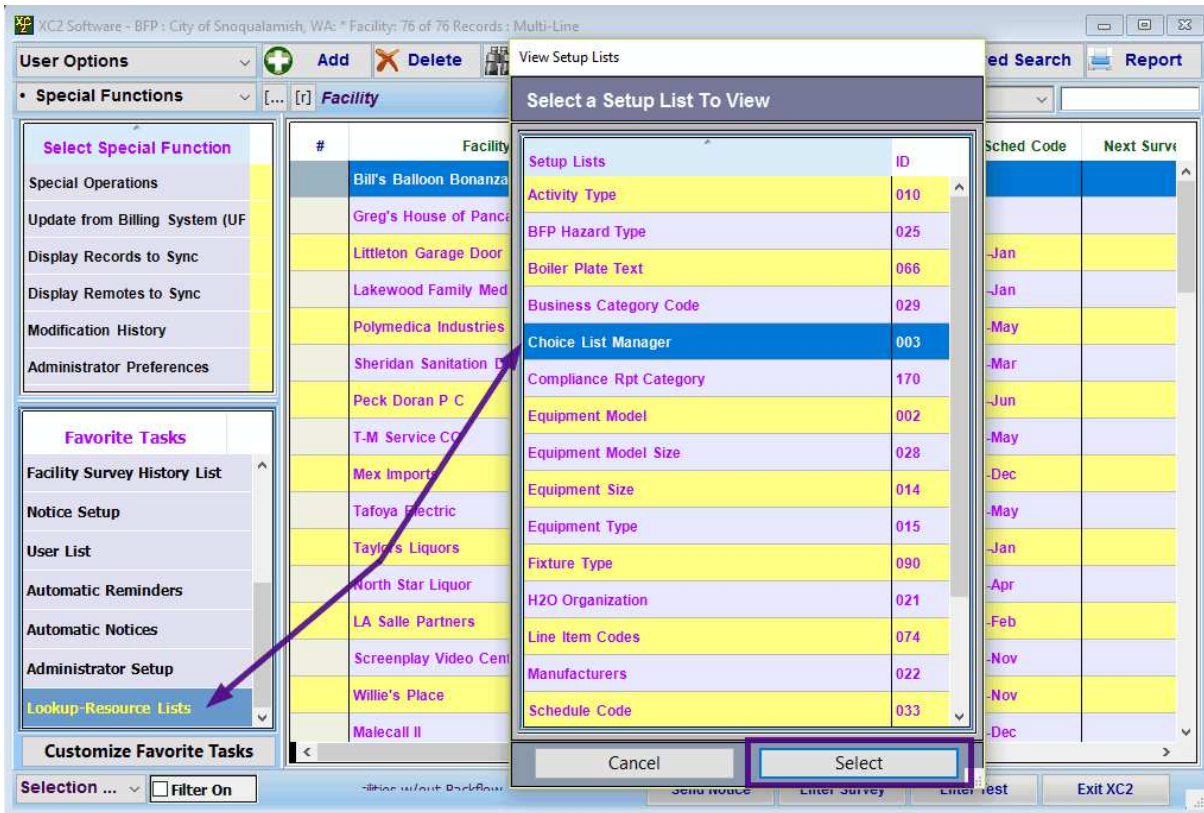
Simply meaning - You type in the information you wish to enter.

The screenshot displays the 'XC2 Software - BFP : Facility : Bill's Balloon Bonanza : 1111 Helium Way : 1 of 76 Selected' window. The interface is divided into several sections:

- Facility Information:** Includes fields for Facility Name (Bill's Balloon Bonanza), Service Addr. (1111 Helium Way), City ST Zip (San Rafael CA 94901), Contact Name (Bill), Position (Blow Hard), and EMail Address (banana@fullohotair.com).
- Custom Fields:** Includes Facility UD 1 (Type you information here), Facility UD 2, and Facility UD 3.
- Property Manager:** Includes Assigned Inspector, Auth. Tester Company, SIC Code, and Rate Code.
- Address Options:** Includes Address Options, Update Options, and Meter & GPS Info.
- Table:** A table with columns: #, Hazard Type, Serial Num, Type, Size, Mfr, Next Test, Last Test, Active, Count, Status, Service Address, Equip Location.
- Buttons:** Quick Test Entry, Enter New Test, New BFP Assembly, Send Notice, Delete Item, View BFP Asse..., Expand List, Exclude Inactive, Pictures/Site Map, Google Maps, Qby BFP (0), Add Facility, Search, Report/Print, Cancel, Save.

Notes:

Open The Choice List Editor



Notes:

Populating The Field With A Choice List

1. Locate the field you wish to edit
2. Enter your data
3. Click NEW button to add additional choices
4. Click Done/Save when complete

Choice List Manager

Maximum Length: 40

Choice List Name (Click Item)	Module
Custom UD Alpha 19	BFP
Custom UD Alpha 20	BFP
Equipment Size Unit	UNIV
Equipment Status	UNIV
Event Type	UNIV
Facility Area Type	UNIV
Facility Parcel Number	UNIV
Facility Status	UNIV
Facility UD 1	UNIV
Facility UD 10	UNIV
Facility UD 3	UNIV
Facility UD 4	UNIV
Facility UD 5	UNIV
Facility UD 6	UNIV
Facility UD 7	UNIV

Enter Item Text:

Choice List Items

Up

Down

Left

New Item

Insert Item

Delete Item

Delete All Items

Style

<<< All Caps

<<< Upper Lo...

Cancel Done/Save

Notes:

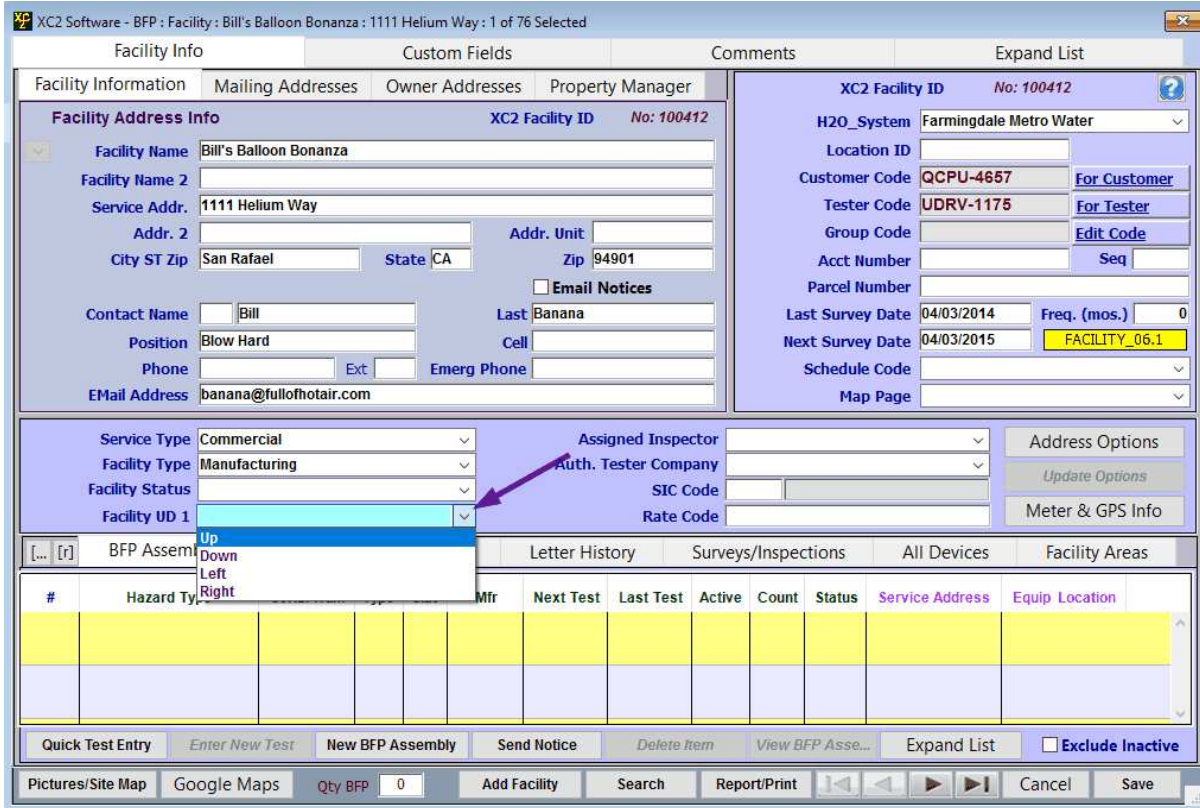
Pull Down List Populated

The first thing you will notice, is that our field now contains an arrow indicating that this is now a pull-down or choice field.

Click the pull-down to reveal the list.

Click on item in list to select.

NOTE: See How To Rename Fields in Administrator Preferences/Custom Field Names



Notes:



XC2 Software Knowledge Base



Equipment Status

KB Asset ID: 2052

Changing or Modifying the Status of a device

What is Equipment Status

Equipment status describes the current condition of the backflow preventer.

XC2 Software - BFP : Academy Veterinary Hospital : Location ID: : RP : Facility ID: 100016 : 6 of 83 Selected

Acct/Address Info History Comments Custom Fields

Service Address Info Mailing Addresses Owner Addresses Property Manager

Enter Test Send Notice Work Order

XC2 Facility ID No: 100016 Assembly ID No: 2002800

Facility Name: Academy Veterinary Hospital

Service Addr: 8350 Street Lighthouse Ct

City ST Zip: Snoqualamish WA Zip 98215

Facility Contact Info

Contact Name: Shelton Last: Cooper

Phone: (696) 235-7924 Cell: (696) 236-3267

Location ID: UD Alp: Map Page: Old Customer Num: UD Date 5: / / UD Date 6: / /

Hazard Type: Air Conditioning System

Pressure Zone: Location Room: Flow GPM: 0 Line PSI: 0

Status: Installed

Next Test Due: Frequency: Last/Dflt Tester: Robinson, Devin

Last Test Date: 08/13/2011 PASS

Inst/Replace By: Install Date: 08/14/2004 Abv. Grade: 0

Inst/Replace Date: 08/14/2004 Replace

Schedule Code: 08-Aug Protection type: Isolation

Inactive Back Pressure

Flood Protect Cont. Pressure

UD CB 1 Back Siphonage

Freeze Protect Impropr. Appl

Confinement Impropr. Install

Pictures/Site Map Google Maps GPS Info Meter Info New BFP Record Search Report/Print Cancel Save

Notes:

Equipment Status Determines "Count"

Equipment status is the main factor that determines whether the device "Counts" toward the facility QTY and compliance reports

For Example:

Below shows XC2's default count settings.

The Top Box are the count conditions for Active Devices

The Bottom Box are the count conditions for inactive Devices.

Device Types that have Y next to them "Count"

Device Types that have N next to them "Do Not Count"

In this case, both Active and Inactive devices that are Installed or Vacant "Count" toward the facility QTY and Compliance Reports.

and

Active and Inactive devices that have been Removed or are Not Required "Do Not Count" toward Facility QTY and Compliance Reports

Administrator Preferences

Table Names/Dfnts | Custom Fields | List Column Setup | Update from CIS Setup | Universal Defaults

Business Info | Default Activity Codes | Data Entry Prefs | Activity Entry | System IDs | Test Criteria

Data Entry Requirements | Notification Prefs | Field Usage | BFP Assembly Defaults | Survey Prefs | Email Settings

Backflow Record Status & Facility Count

Assembly Status List

Active - "Y" = Counts in Facility Qty and Compliance Reports

Y/N	Status
Y	Installed
N	Removed
N	Not Required
Y	Vacant

In Active - "Y" = Counts in Facility Qty and Compliance Reports

Y/N	Status
Y	Installed
N	Removed
N	Not Required
Y	Vacant

Default for New Records: **Equipment**

Request if is a New Installation

Equipment Status: Installed

Protection Type: Containment

Equipment Type Code: [] Clear

Compliance Report Info Defaults

Protection Type "Containment": Containment

Protection Type "Isolation": Isolation

Indicate which protection types are: "Protection at the Meter"

Protection Type
<input checked="" type="checkbox"/> Containment
<input type="checkbox"/> Isolation

Work Order: "Removal" Preferences:

Remove Type Code - Replace With: []

Remove Size - Replace With "Removed"

Remove Make - Replace With "Removed"

Remove Model - Replace With "Removed"

Remove Serial Number - Replace With "Removed"

Main Screen Minimum Height: 720

Default Test Frequency: 12

Tester Input - #1 - PERSONNEL_06_EZ - Minimum Info

Tester Input - #2 - PERSONNEL_06_01 - (with Photo)

Tester Input - #3 - PERSONNEL_06-03 - Licenses on First Page

Tester Input - #4 - PERSONNEL_02 (Old - 750x500 pixel)

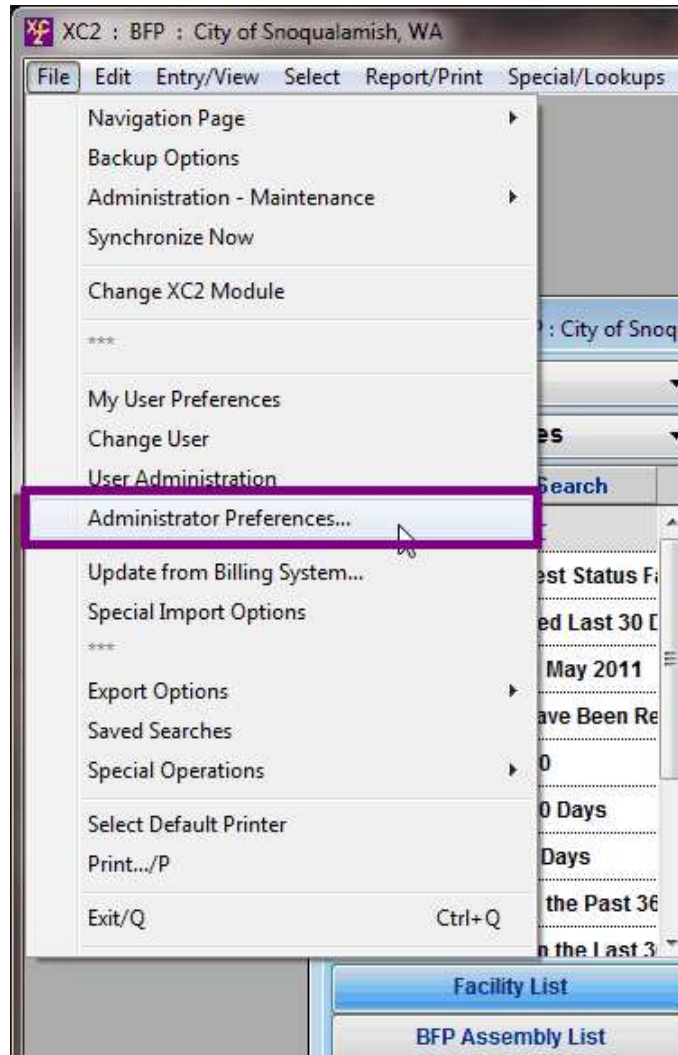
PREFS_03_BFP.04 | Sample Parameter List | Charge Rates | Cancel | Done

Notes:

Finding Equipment Status

Equipment Status is located in Administrator Preferences (you will need super admin access)

1) Go up to the file menu and select administrator preferences



Notes:

To Add or Modify existing Available Equipment Status Types

In Administrator Preferences,

Click

- Data Entry Preferences Tab

- BFP Assembly Defaults Tab

Click on Assembly Status List

Administrator Preferences

Table Names/Dfnts | Custom Fields | List Column Setup | Update from CIS Setup | Universal Defaults

Business Info | Default Activity Codes | **Data Entry Prefs** | Activity Entry | System IDs | Test Criteria

Data Entry Requirements | Notification Prefs | Field Usage | **BFP Assembly Defaults** | Survey Prefs | Email Settings

Backflow Record Status & Facility Count

Assembly Status List

Active - "Y" = Counts in Facility Qty and Compliance Report

Y/N	Status
Y	Installed
N	Removed
N	Not Required
Y	Vacant

In Active - "Y" = Counts in Facility Qty and Compliance Reports

Y/N	Status
Y	Installed
N	Removed
N	Not Required
Y	Vacant

Default for New Records: Equipment

Request if is a New Installation

Equipment Status Installed

Protection Type Containment

Equipment Type Code Clear

Work Order: "Removal" Preferences:

Remove Type Code - Replace With:

Remove Size - Replace With "Removed"

Remove Make - Replace With "Removed"

Remove Model - Replace With "Removed"

Remove Serial Number - Replace With "Removed"

Compliance Report Info Defaults

Protection Type "Containment": Containment

Protection Type "Isolation": Isolation

Indicate which protection types are: "Protection at the Meter"

✓	Protection Type
✓	Containment
	Isolation

Main Screen Minimum Height 720

Default Test Frequency 12

Tester Input - #1 - PERSONNEL_06_EZ - Minimum Info

Tester Input - #2 - PERSONNEL_06_01 - (with Photo)

Tester Input - #3 - PERSONNEL_06-03 - Licenses on First Page

Tester Input - #4 - PERSONNEL_02 (Old - 750x500 pixel)

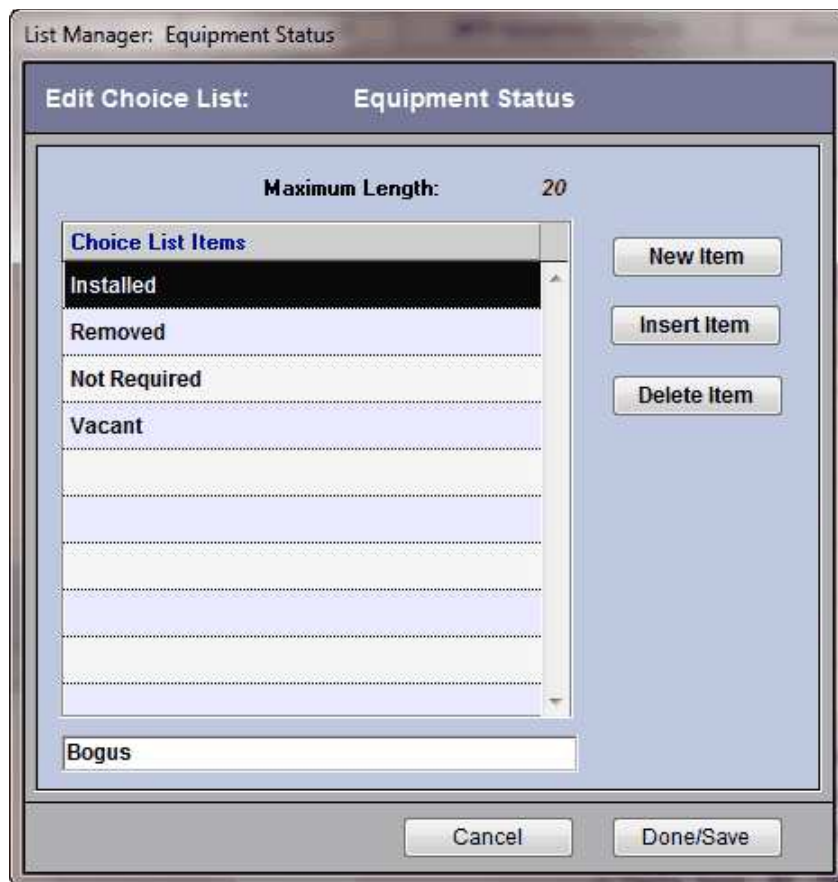
PREFS_03_BFP.04 | Sample Parameter List | Charge Rates | Cancel | Done

Notes:

Make a Change

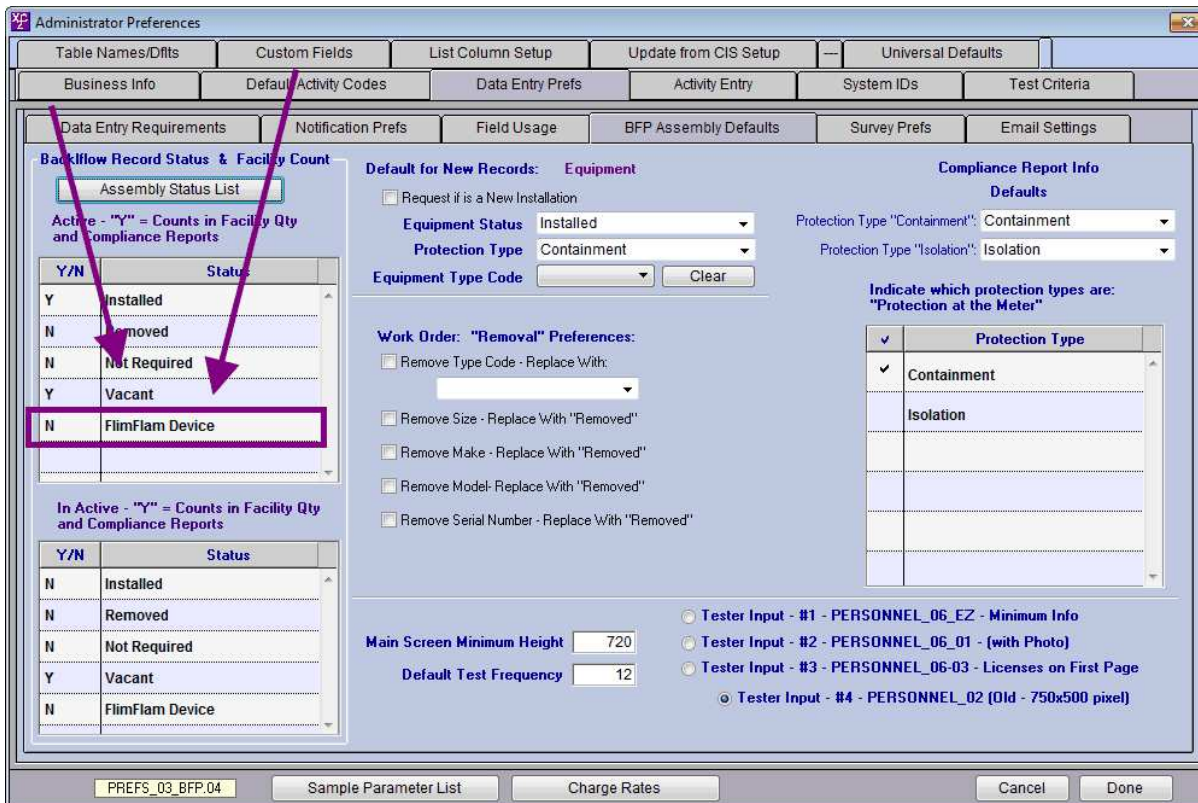
Enter a New Equipment Status or change a old one.

Click done/save



Notes:

When you first create a status item, a N will be associated with the item and will "not count". You may change the status if you like.



Notes:



XC2 Software Knowledge Base



Facility Status

KB Asset ID: 2053

This Page describes where the facility status field is located and how to modify its contents

What is Facility Status

The Facility Status menu can be found inside each facility record. It is used as an indicator of its current state.

The screenshot shows the 'Facility Info' tab in the XC2 software. The 'Facility Name' is 'Ollie's Roundup' and the 'XC2 Facility ID' is 'No: 461'. The 'Facility Status' dropdown menu is open, showing options: 'Open', 'Permit', 'Open', 'Verify', 'Closed', 'Hold', and 'Vacant'. The 'Open' option is highlighted in yellow. Below the dropdown is a table of BFP Assemblies.

#	Hazard Type	Type	Size	Mfr	Next Test	Last Test	Active	Count	Status	Service Address	Equip Location
1	Washer, Pressure	RP	1 1/4"	WATTS	11/30/2011	11/14/2010	✓	Y	Installed	9451 S Banbridge Ln	

Notes:

Choice List Manager

Click Lookup/Setup Lists

Select Choice List Manager

The screenshot displays the 'View Setup Lists' dialog box in the XC2 Software. The dialog box is titled 'Select a Setup List To View' and contains a table with the following data:

Setup Lists	ID
Activity Type	010
BFP Hazard Type	025
Boiler Plate Text	066
Business Category Code	029
Choice List Manager	003
Compliance Rpt Category	170
Equipment Model	002
Equipment Model Size	028
Equipment Size	014
Equipment Type	015
Fixture Type	090
H2O Organization	021
Line Item Codes	074
Manufacturers	022
Schedule Code	033

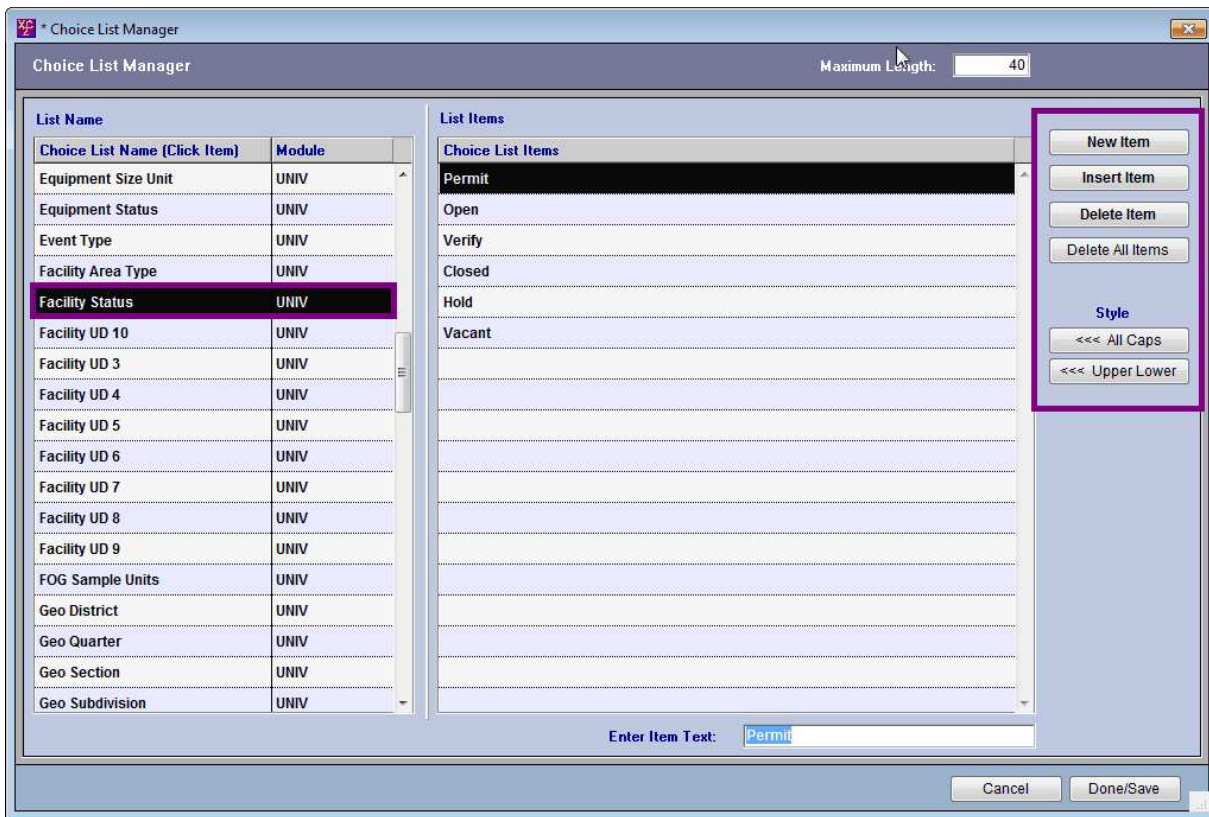
The 'Choice List Manager' entry is highlighted with a purple box and a purple arrow. The background shows a table of addresses with columns: Addr (#), Street, and Next Test. The sidebar on the left contains 'Favorite Tasks' with 'Lookup-Resource Lists' highlighted.

Notes:

Facility Status

Scroll down until you see facility status then select facility status.

you may modify the list by clicking on one of the buttons on the right



Notes:



XC2 Software Knowledge Base



How to Setup Map Page

KB Asset ID: 2058

This page describes how to add or remove values in the Map Page List

What Is Map Page Used For

Before the era of Smart Phones and Mobile Devices capable of producing digital maps, paper map books were commonly used as navigation aids.

The Map Page field was added so if you used map books to navigate, you could find the correct page easily.

Notes:

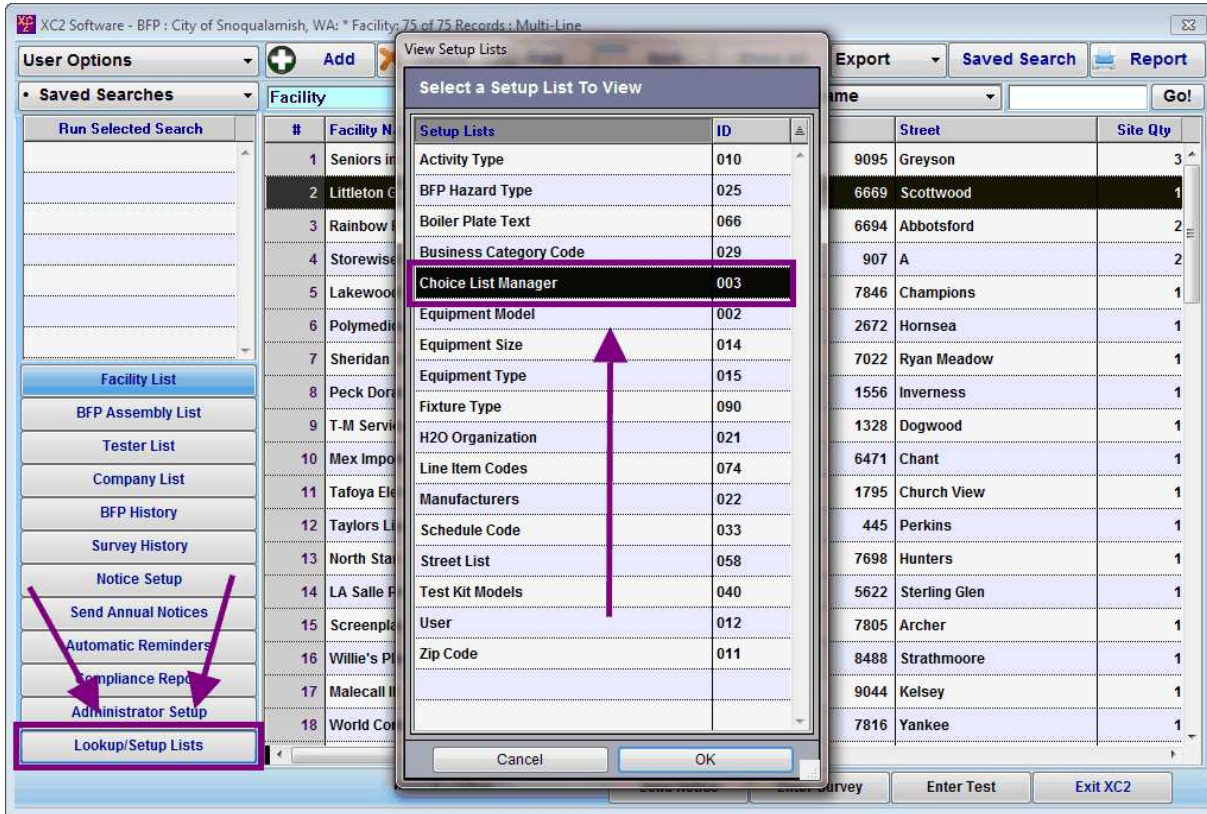
Choice List Manager

Select

Lookup/Select List

Double click on

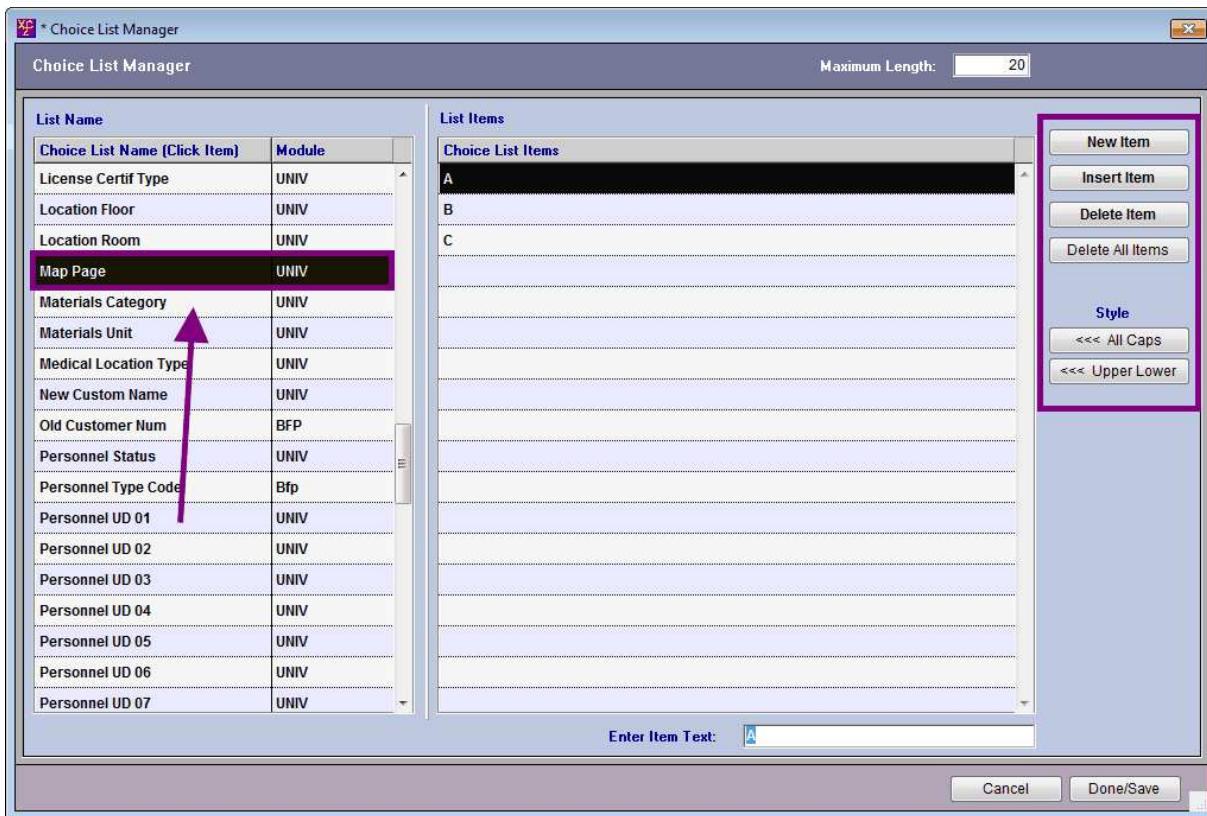
Choice List Manager



Notes:

Scroll down until you see Map Page and Highlight the topic

To modify this list Click on one of the buttons on the right of the screen



Notes:



Tester Personnel Status

KB Asset ID: 2059

Page describes what tester personnel status means and where you can select current status

What are Personnel Status Fields?

Tester Personnel Status fields are located in the tester record.

There are Four Checkboxes that may be used

- 1) Inactive - Warn Before Use
- 2) Inactive - Permanent
- 3) Is on Authorized List
- 4) Do not Include on Public List

The screenshot shows a software window titled "XC2 Software - BFP : BFP Testers : Gray, Salvador : Cert Num: 5507 : Exp Date: 04/04/2014 : 12 of 13 Selected". The "Personnel Status Fields" section is highlighted with a purple box. It contains four checkboxes: "Inactive Warn Before Using", "Inactive - Permanent", "Is on Authorized List", and "Do Not Include on Public List". Two purple arrows point from the list items in the text above to these checkboxes. The "User ID" field is also visible, containing "XC2 User".

Notes:

Personnel Status Choices

Inactive - Warn Before Use

This will render the tester record Inactive

If you try to enter a test by a tester that is marked "inactive warn before use", an alert will remind you he is inactive.

You may activate him after this message or choose someone else.

Inactive - Permanent

This will render the tester record Inactive and will not visible in the system.

Tester will not be available for selection.

Is on Authorized List

This was a field created to visually display if the tester is Authorized.

Do Not Include on Public List

This will exclude the tester from the list of active testers in your letter and in your printable active tester list.



XC2 Software Knowledge Base



Choosing and Editing Service Types

KB Asset ID: 2060

This Page Will show you how to edit and add new service types and Where to designate facilities.

Service Type

Service type can be found in the facility record. It is used to tell XC2 what Service category the facility belongs to.

The screenshot shows the 'Facility Information' tab in the XC2 software. The facility name is 'Hospital Shared Services Warehouse' and the facility ID is '100122'. A dropdown menu for 'Service Type' is open, showing a list of categories. The 'Hospital' option is selected. Below the dropdown is a table of equipment records.

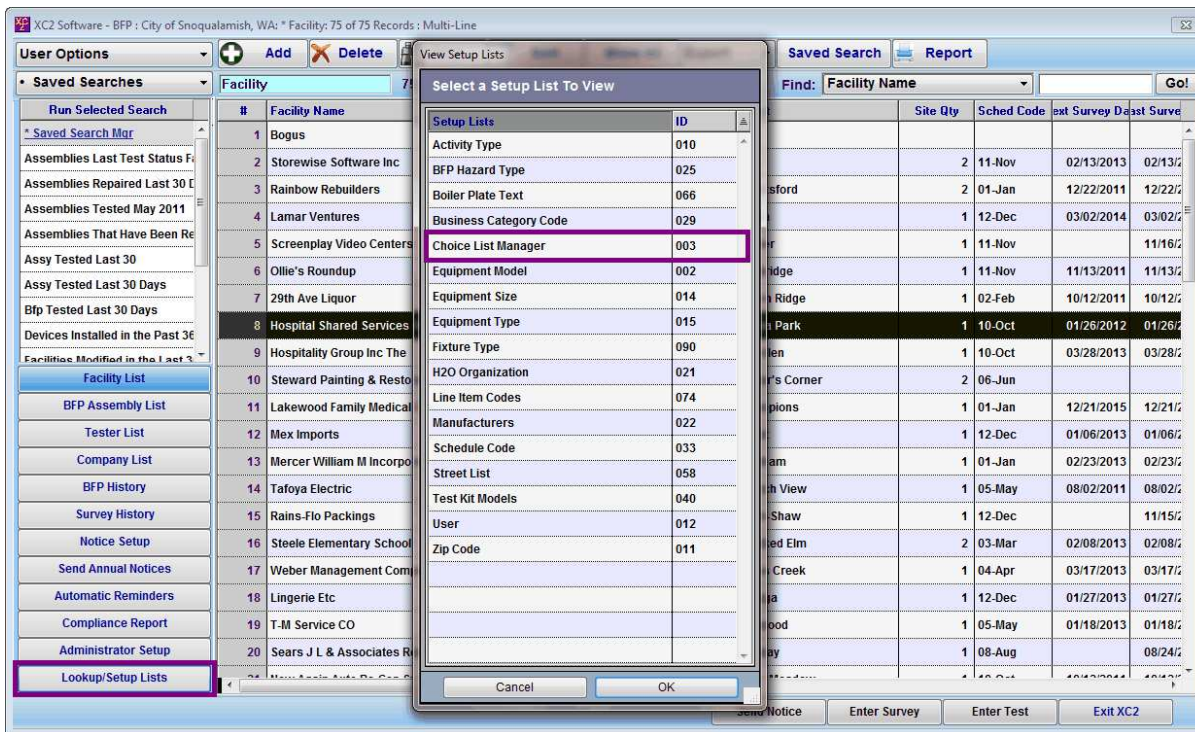
#	azard Type	Size	Mfr	Next Test	Last Test	Active	Count	Status	Service Address	Equip Location
1	Injector, Fertilizer	682319	RP 1 1/4" WILKINS	08/01/2012	11/14/2011	✓	Y	Installed	5998 Buena Park Dr	

Notes:

Editing Service Types

Click Lookup/Setup Lists

Select Choice List Manager

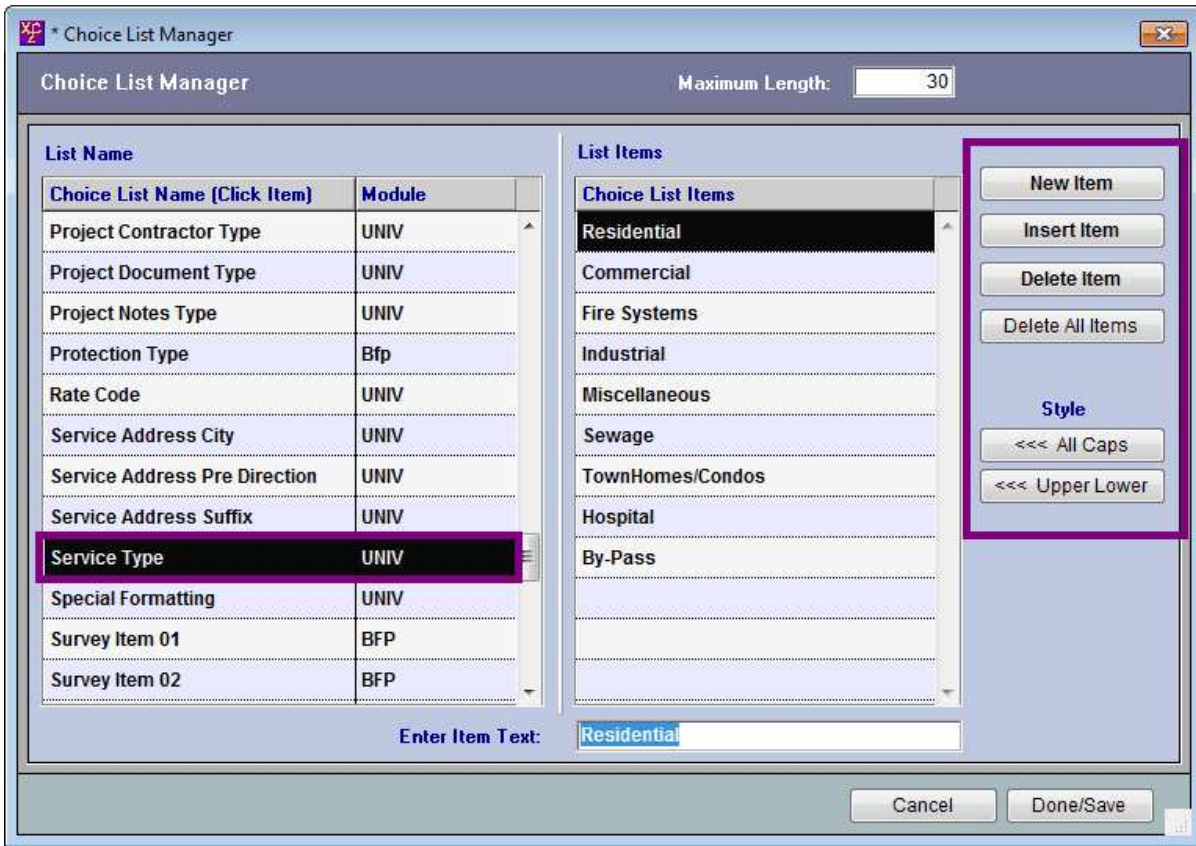


Notes:

Adding Service Types

Select Service type

Edit list by using buttons on right



Notes:



XC2 Software Knowledge Base



Adding Test Kit Manufacturers

KB Asset ID: 2061

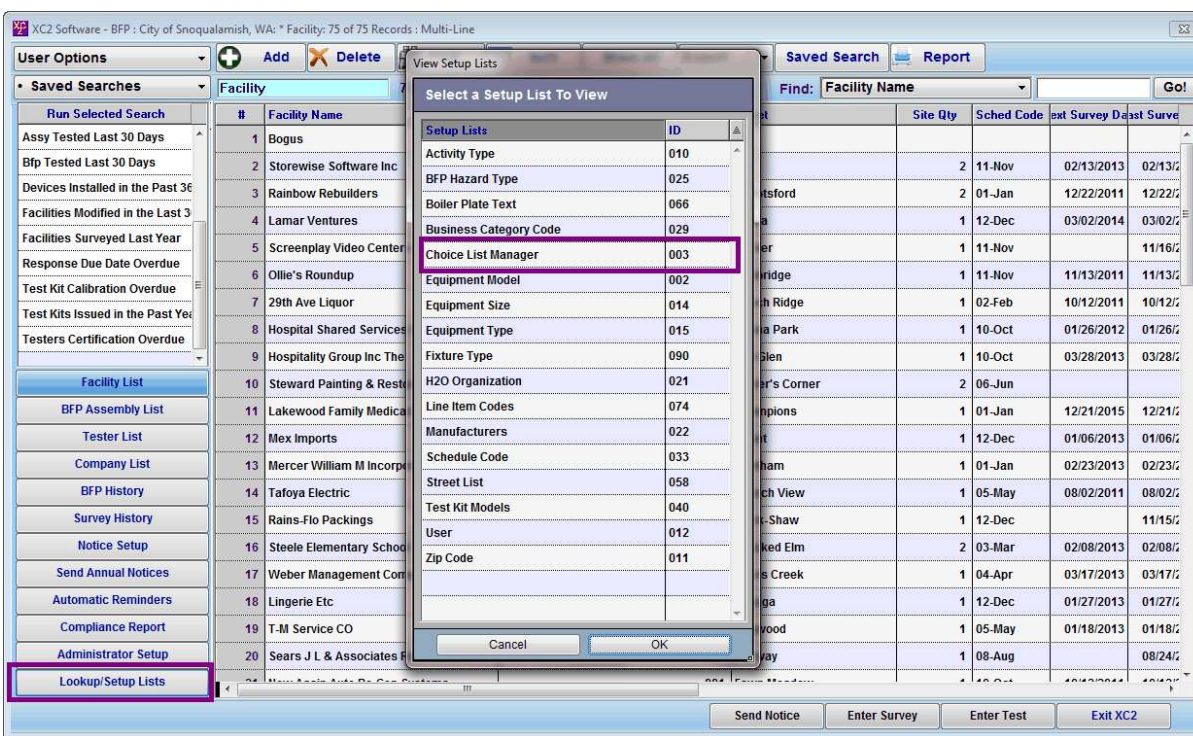
Shows you where you can enter Test Kit Manufacturers in XC2

Choice List Setup

The list to add Test kit Manufacturers can be found in the Choice List Setup.

Go to Lookup/Setup Lists

Select Choice List Setup

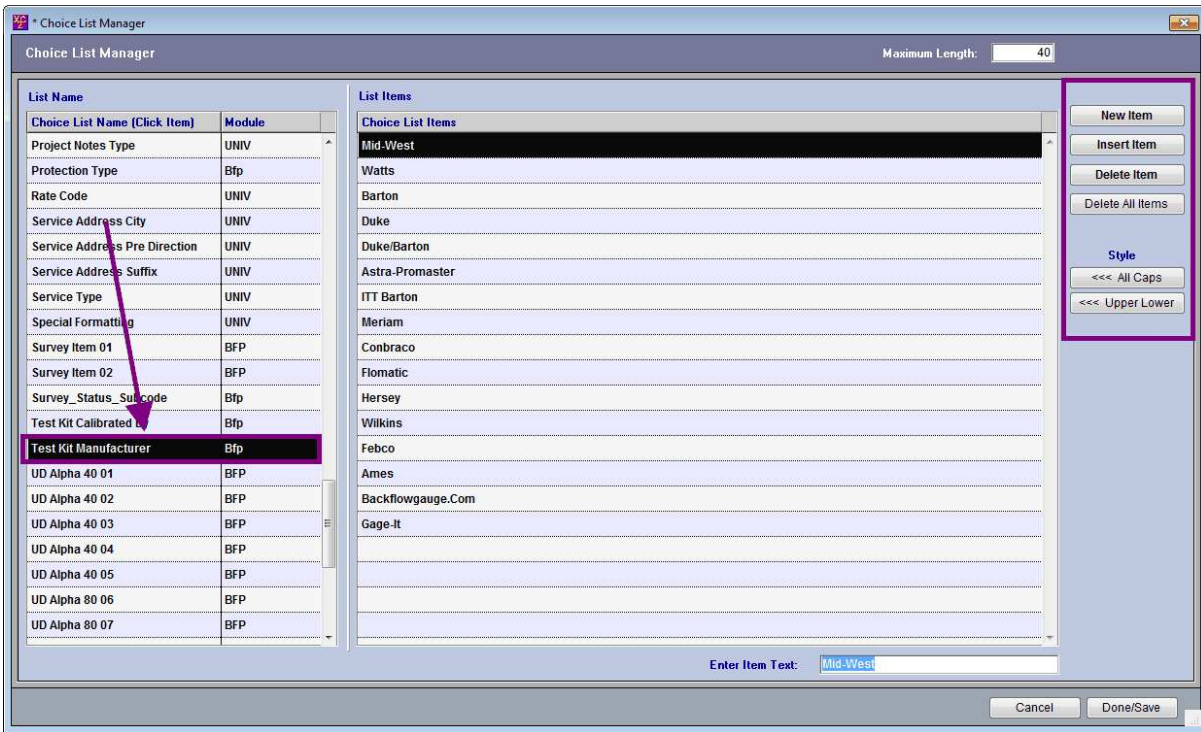


Notes:

Edit Test Kit Manufacturers

Scroll down until you can see Test Kit Manufacturers.

Highlight the manufacturer and click on the buttons on the right to modify



Notes:



XC2 User Manual Special Operations

- **Modification History/Special Operations Log**
- **Deduperator**
- **Assign an Inspector to Group Of Facilities**



XC2 Software Knowledge Base



Feature - Audit Trail: Special Operations Log

KB Asset ID: 2205

Keep Records of What Happened in XC2

The purpose of XC2's Audit Trail is to keep detailed records of specific operations that were performed in XC2. XC2's Audit Trail will track what Operations were performed, who performed the operation, day and time the operation was performed and comments related to the operation.

These operations include but are not limited to the following:

- Deletions
- Mass Updates
- User LogOn/LogOff
- Errors Encountered
- Imports/Exports
- Version Updates
- Administrator Preferences Access
- Synchronizations
- Server Startup/Shutdown
- Other Special Operations

Below is The Special Operations Log where you can search for a specific operation.

#	Date	Time	User	Operation	Comments
1	12/18/2013	11:18 AM		Data File Size	Data File Size: 153.74 mb=====
2	12/18/2013	11:18 AM		Update Build Number	Previous Build #: 1050New Build #: 2
3	12/18/2013	11:18 AM		System Config	System Config ChangesID: 1000103
4	12/18/2013	11:18 AM	DEMO	User Log On	User Logged onto SystemDate: 12/18/2013
5	12/18/2013	11:18 AM	DEMO	System Config	System Config Changes:Univ_Last_U
6	12/18/2013	11:18 AM	DEMO	Startup Time	Time : Elapsed Time : Startu
7	12/18/2013	12:06 PM	DEMO	User Log Off	=====Vers
8	12/18/2013	12:07 PM		Data File Size	Data File Size: 153.74 mb=====
9	12/18/2013	12:07 PM	DEMO	User Log On	User Logged onto SystemDate: 12/18/2013
10	12/18/2013	12:07 PM	DEMO	Startup Time	Time : Elapsed Time : Startu
11	12/18/2013	12:08 PM	DEMO	Admin Prefs Access	MenuBizInfo=====
12	12/18/2013	12:09 PM	DEMO	Admin Prefs Access	MenuBizInfo=====
13	12/18/2013	12:09 PM	DEMO	System Config	
14	12/18/2013	12:09 PM	DEMO	Admin Prefs Access	MenuBizInfo=====
15	12/18/2013	12:09 PM	DEMO	System Config	
16	12/18/2013	12:13 PM	DEMO	Admin Prefs Access	MenuBizInfo=====
17	12/18/2013	12:13 PM	DEMO	System Config	
18	12/18/2013	12:14 PM	DEMO	Admin Prefs Access	MenuBizInfo=====
19	12/18/2013	12:14 PM	DEMO	System Config	
20	12/18/2013	12:15 PM	DEMO	Admin Prefs Access	MenuBizInfo=====

Notes:



XC2 Software Knowledge Base



Deduperator For Duplicate Facility Lookup

KB Asset ID: 3509

Deduperator is a handy tool used to lookup duplicate facility records based on several criterias

Accessing Deduperator

From the Main Page

- Main Page Functions
- Special Functions

The screenshot displays the XC2 Software interface. The title bar reads "XC2 Software - BFP : City of Snoqualamish, WA: * Facility: 76 of 76 Records : Multi-Line". The main menu includes "User Options", "Add", "Delete", "Find", "Sort", "Show All", "Export", "Saved Search", and "Report". The "Main Page Functions" menu is expanded, showing options like "Saved Searches", "Quick Lookups", "Exports", "Reports", "List Views", "Special Functions", and "Resources and Pick Lists". A red arrow points to the "Special Functions" option. Below the menu is a table of facility records with columns: #, Facility Name, Addr (#), Street, Site Qty, Sched Code, and Next Survey I.

#	Facility Name	Addr (#)	Street	Site Qty	Sched Code	Next Survey I
1	Littleton Garage Door Service	6669	Scottwood	1	01-Jan	00
2	Seniors in Community Living Inc	9095	Greyson	2	05-May	00
3	Rainbow Rebuilders	6694	Abbotsford	2	01-Jan	10
4	Storewise Software Inc	5038	Somerset	2	11-Nov	00
5	Lakewood Family Medical Clinic Pc	7846	Champions	1	01-Jan	10
6	Polymedica Industries Inc	2672	Hornsea	1	05-May	00
7	Sheridan Sanitation District #2	7022	Ryan Meadow	1	03-Mar	00
8	Peck Doran P C	1556	Inverness	1	06-Jun	00
9	T-M Service CO	1328	Dogwood	1	05-May	00
10	Mex Imports	6471	Chant	1	12-Dec	00
11	Tafoya Electric	1795	Church View	1	05-May	08
12	Taylors Liquors	445	Perkins	1	01-Jan	00
13	North Star Liquor	7698	Hunters	1	04-Apr	00
14	LA Salle Partners	5622	Sterling Glen	1	02-Feb	00
15	Screenplay Video Centers	7805	Archer	1	11-Nov	00
16	Willie's Place	8488	Strathmoore	1	11-Nov	00
17	Malecall II	9044	Kelsey	1	12-Dec	10

Notes:

Select Special Operations

The screenshot shows the XC2 Software interface for the City of Snoqualamish, WA. The main window displays a list of 76 facilities. The sidebar on the left has 'Special Operations' selected under the 'Select Special Function' menu. The table below shows the first 17 records of the facility list.

#	Facility Name	Addr (#)	Street	Site Qty	Sched Code	Next Surve
1	Littleton Garage Door Service	6669	Scottwood	1	01-Jan	
2	Seniors in Community Living Inc	9095	Greyson	2	05-May	
3	Rainbow Rebuilders	6694	Abbotsford	2	01-Jan	
4	Storewise Software Inc	5038	Somerset	2	11-Nov	
5	Lakewood Family Medical Clinic Pc	7846	Champions	1	01-Jan	
6	Polymedica Industries Inc	2672	Hornsea	1	05-May	
7	Sheridan Sanitation District #2	7022	Ryan Meadow	1	03-Mar	
8	Peck Doran P C	1556	Inverness	1	06-Jun	
9	T-M Service CO	1328	Dogwood	1	05-May	
10	Mex Imports	6471	Chant	1	12-Dec	
11	Tafoya Electric	1795	Church View	1	05-May	
12	Taylor's Liquors	445	Perkins	1	01-Jan	
13	North Star Liquor	7698	Hunters	1	04-Apr	
14	LA Salle Partners	5622	Sterling Glen	1	02-Feb	
15	Screenplay Video Centers	7805	Archer	1	11-Nov	
16	Willie's Place	8488	Strathmoore	1	11-Nov	
17	Malecall II	9044	Kelsey	1	12-Dec	

Notes:

Select duplicate category

You can lookup duplicate facilities by

Account Number

Facility Name

Service, Mailing, or Owner Address

Click Find The Dup

The Deduperator

XC2 Deduperator

Find Duplicate Entries based upon the

Location ID **Number of characters to ascertain**

Facility Account Number

Facility Name

Address

Mailing Address ID

Owner Address ID

Enter Value Range or Click Current Selection Checkbox

Facility Name is greater than or Equal To:

Facility Name is less than or Equal To:

 Use Current

Notes:



Assigning Inspector To Facility

KB Asset ID: 3511

If you use assigned specific inspectors to your facility records, this function allows gather a list of facility records who will have the same inspector assigned to them and change them all at once.

Gather You facility List

Perform a search for facility records who will be assigned the SAME inspector

- Click Main Page Functions
- Special Functions

The screenshot shows the XC2 software interface for a facility list. The title bar indicates 'XC2 Software - BFP : City of Snoqualamish, WA: * Facility: 7 of 76 Records : Multi-Line'. The main menu includes 'User Options', 'Add', 'Delete', 'Find', 'Sort', 'Show All', 'Export', 'Saved Search', and 'Report'. The 'Main Page Functions' menu is open, showing options like 'Saved Searches', 'Quick Lookups', 'Exports', 'Reports', 'List Views', 'Special Functions', and 'Resources and Pick Lists'. The 'Special Functions' option is highlighted. Below the menu, there are sections for 'Favorite Tasks' (Facility List, BFP Assembly List, BFP Testers List, Tester Company List, Test Kits List, Test History, Facility Survey History List) and 'Customize Favorite Tasks'. The main data area is a table with 7 records, showing columns for Facility Name, Addr (#), Street, Site Qty, Sched Code, and Next Survi. The table data is as follows:

#	Facility Name	Addr (#)	Street	Site Qty	Sched Code	Next Survi
1	Lakewood Family Medical Clinic Pc	7846	Champions	1	01-Jan	
2	Peck Doran P C	1556	Inverness	1	06-Jun	
3	Polymedica Industries Inc.	2672	Hornsea	1	05-May	
4	Rainbow Rebuilders	6694	Abbotsford	2	01-Jan	
5	Sheridan Sanitation District #2	7022	Ryan Meadow	1	03-Mar	
6	Storewise Software Inc.	5038	Somerset	2	11-Nov	
7	T-M Service CO	1328	Dogwood	1	05-May	
				9		

At the bottom of the interface, there are buttons for 'Send Notice', 'Enter Survey', 'Enter Test', and 'Exit XC2'. There are also checkboxes for 'Filter On' and 'Filter Facilities w/out Backflow'.

Notes:

Special Operations

Double Click Special Operations

The screenshot shows the XC2 Software interface for BFP in Snoqualamish, WA. The main window displays a table of 76 records, with 7 records visible. The left sidebar has 'Special Operations' selected under 'Select Special Function'. The table columns are: #, Facility Name, Addr (#), Street, Site Qty, Sched Code, and Next Survey.

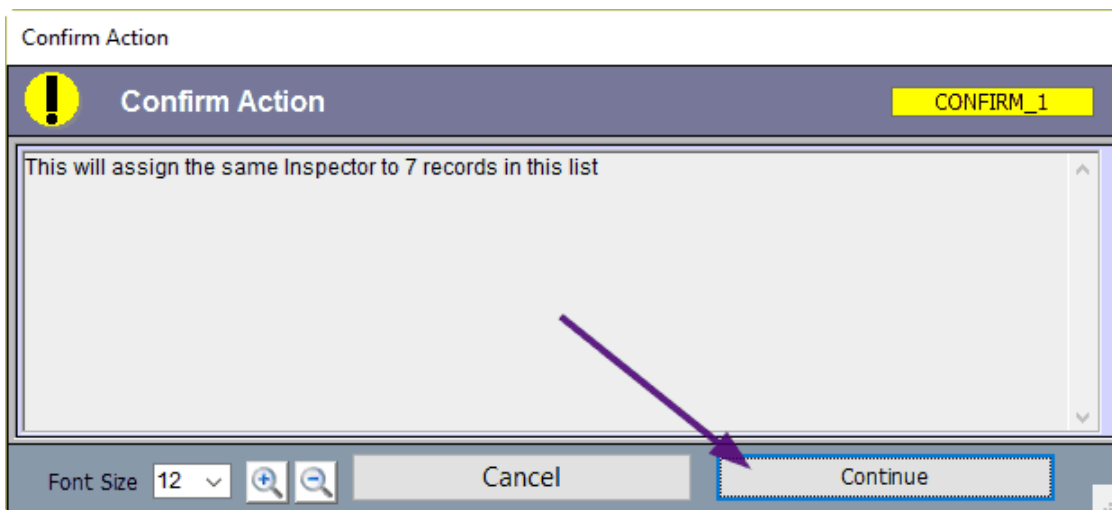
#	Facility Name	Addr (#)	Street	Site Qty	Sched Code	Next Survey
1	Lakewood Family Medical Clinic Pc	7846	Champions	1	01-Jan	
2	Peck Doran P C	1556	Inverness	1	06-Jun	
3	Polymedica Industries Inc	2672	Hornsea	1	05-May	
4	Rainbow Rebuilders	6694	Abbotsford	2	01-Jan	
5	Sheridan Sanitation District #2	7022	Ryan Meadow	1	03-Mar	
6	Storewise Software Inc	5038	Somerset	2	11-Nov	
7	T-M Service CO	1328	Dogwood	1	05-May	
				9		

At the bottom of the interface, there are buttons for 'Send Notice', 'Enter Survey', 'Enter Test', and 'Exit XC2'. There are also checkboxes for 'Filter On' and 'Filter Facilities w/out Backflow'.

Notes:

Confirm the records to be changed

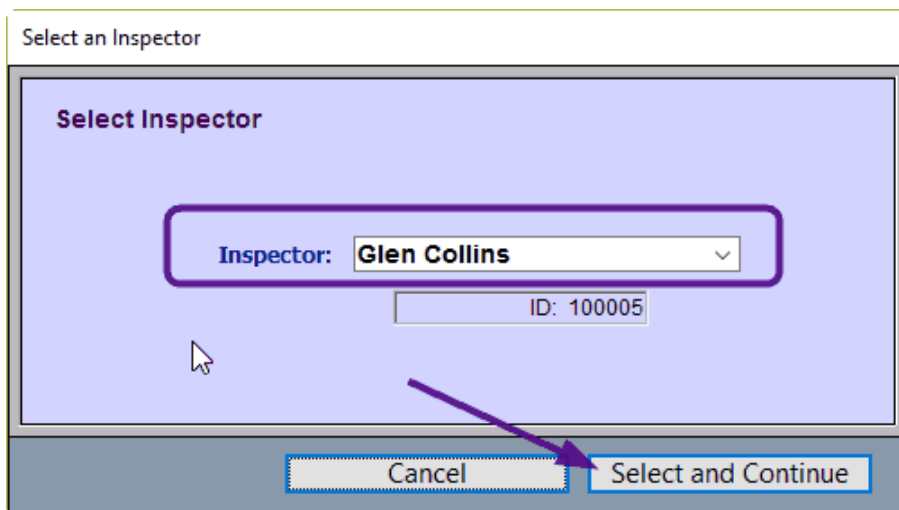
Click Continue



Notes:

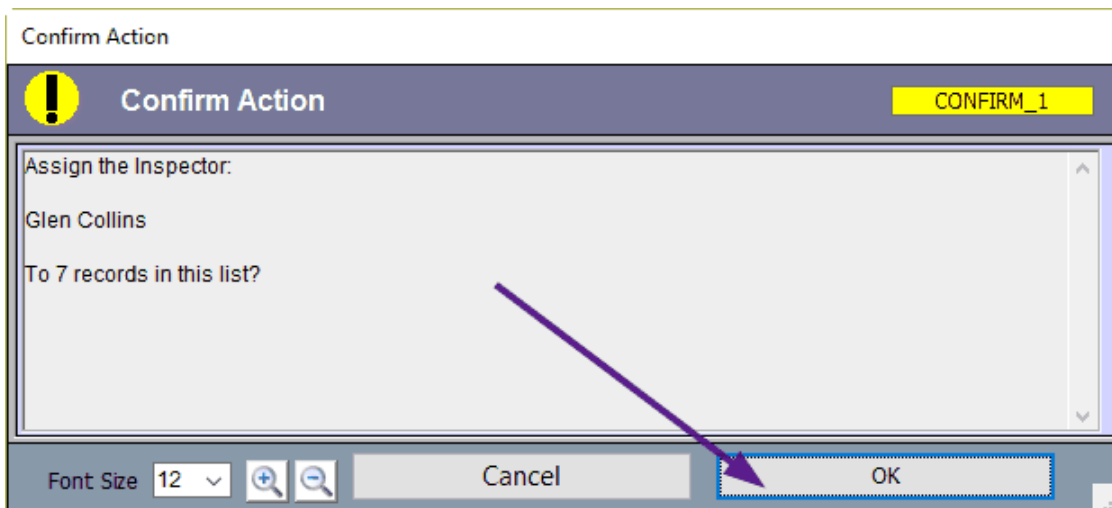
Select Inspector

Select and Continue



Notes:

Confirm the change



Notes:

Inspector is assigned

XC2 Software - BFP : Facility : Lakewood Family Medical Clinic Pc : 7846 Champions CT : 3 of 7 Selected

Facility Info Custom Fields Comments Expand List

Facility Information Mailing Addresses Owner Addresses Property Manager

Facility Address Info **XC2 Facility ID** No: 69

Facility Name: Lakewood Family Medical Clinic Pc
 Facility Name 2:
 Service Addr.: 7846 Champions CT
 Addr. 2:
 City ST Zip: Snoqualamish State WA Zip 98215
 Email Notices:
 Contact Name: Terry Last: Perez
 Position:
 Cell: (696) 234-6149
 Phone: (696) 235-5942 Ext:
 Emerg Phone:
 EMail Address:
 Location ID: 69 Edit Number
 Customer Code: RHUU-9876 For Customer
 Tester Code: SGMV-4715 For Tester
 Group Code: Edit Code
 Acct Number: 22782-000 Seq:
 Parcel Number: 18100
 Last Survey Date: 12/21/2010 Freq. (mos.): 60
 Next Survey Date: 12/21/2015 FACILITY_06.1
 Schedule Code: 01-Jan
 Map Page:
 Service Type:
 Facility Type: Same day surgery centers
 Facility Status: Active
 Facility UD 1: 7009150
 Assigned Inspector: Glen Collins
 Auth. Tester Company:
 SIC Code:
 Rate Code:
 Address Options
 Update Options
 Meter & GPS Info

[...] [r] BFP Assembly List BFP Assembly History Letter History Surveys/Inspections All Devices Facility Areas

#	Hazard Type	Serial Num	Type	Size	Mfr	Next Test	Last Test	Active	Count	Status	Service Address	Equip Location
1	Washer, Pressure	BY18597	RP	1 1/2	WATTS	01/31/12	04/01/11	✓	Y	Installer	7846 Champions C	

Quick Test Entry Enter New Test New BFP Assembly Send Notice Delete Item View BFP Asse... Expand List Exclude Inactive

Pictures/Site Map Google Maps Qty BFP: 1 Add Facility Search Report/Print Cancel Save

Notes:
