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XC2 User Manual

Getting Started

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

XC2 Software Knowledge Base

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

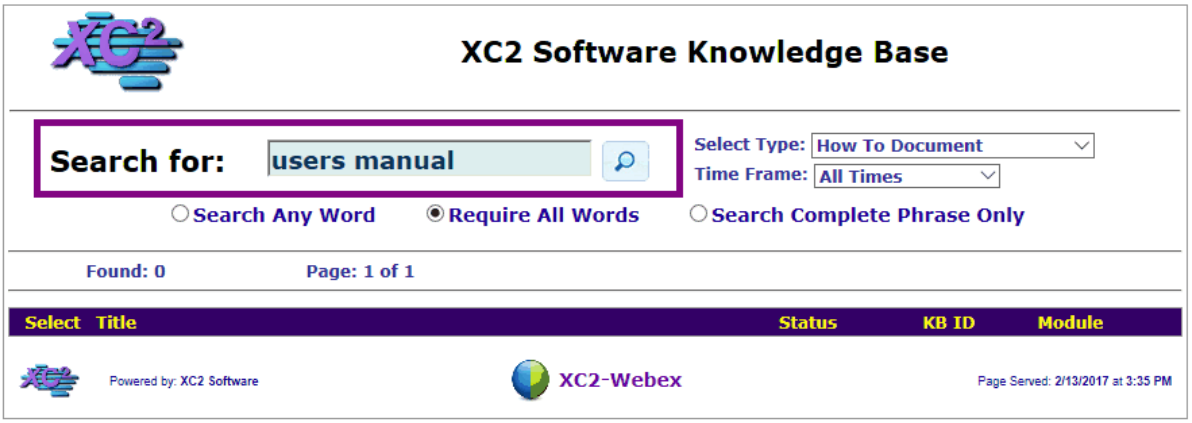
2) Click the link to access our search page

XC2help.net

Notes:

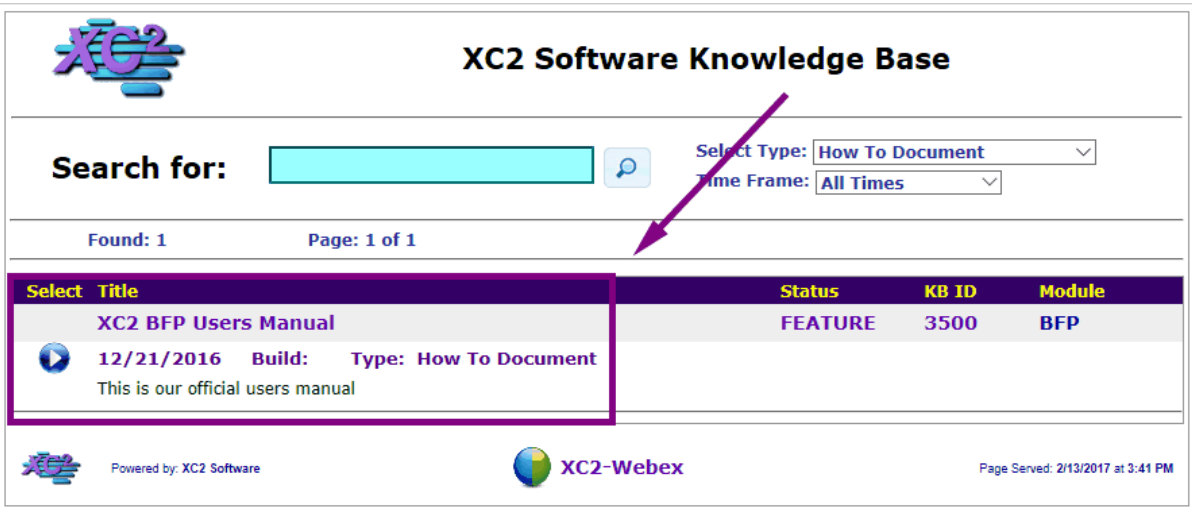
Search

Perform a search for Users Manual



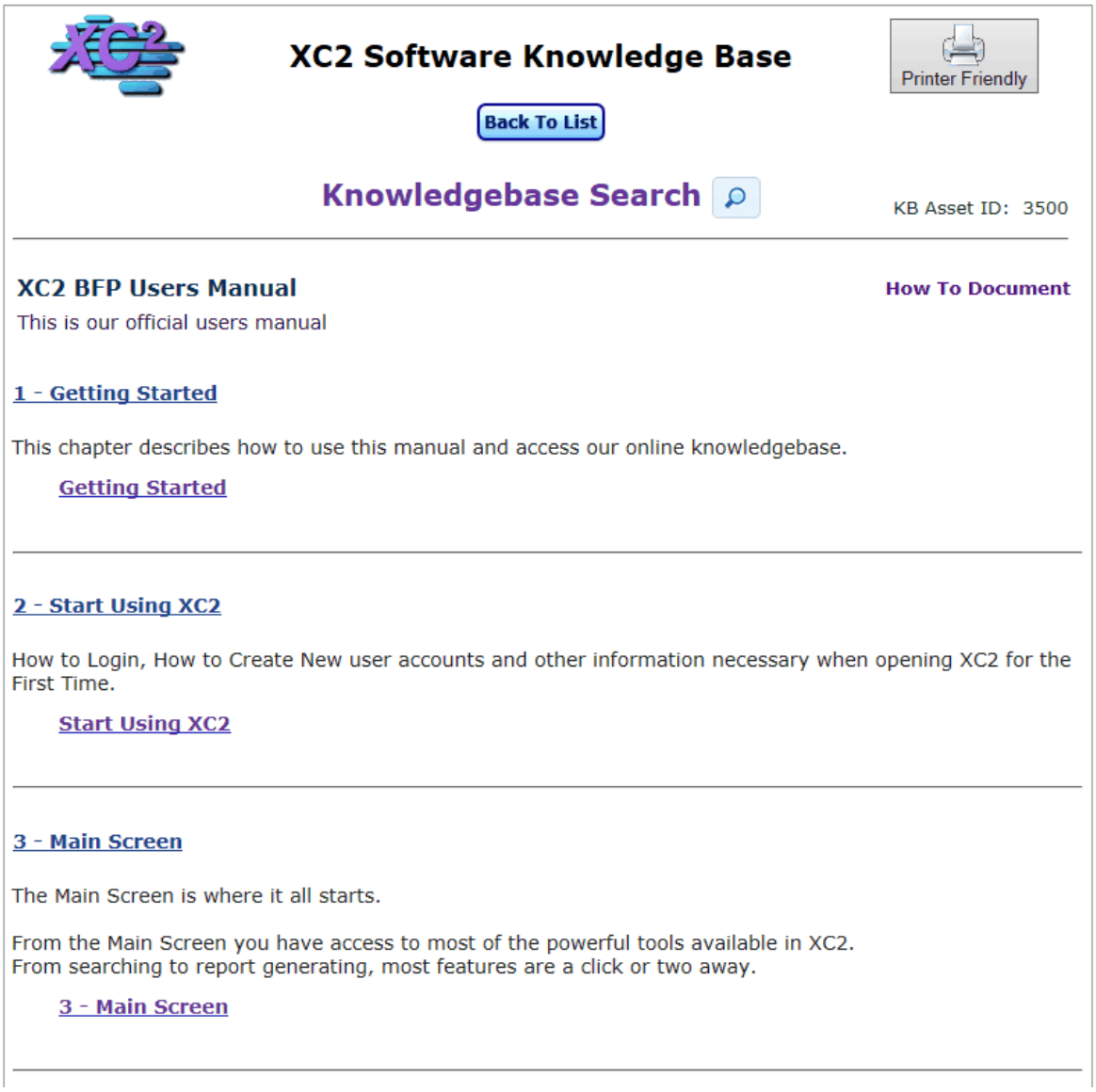
Notes:

Select the Users Manual



Notes:

Online Guide



XC2 Software Knowledge Base

Printer Friendly

Back To List

Knowledgebase Search

KB Asset ID: 3500

XC2 BFP Users Manual How To Document

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.

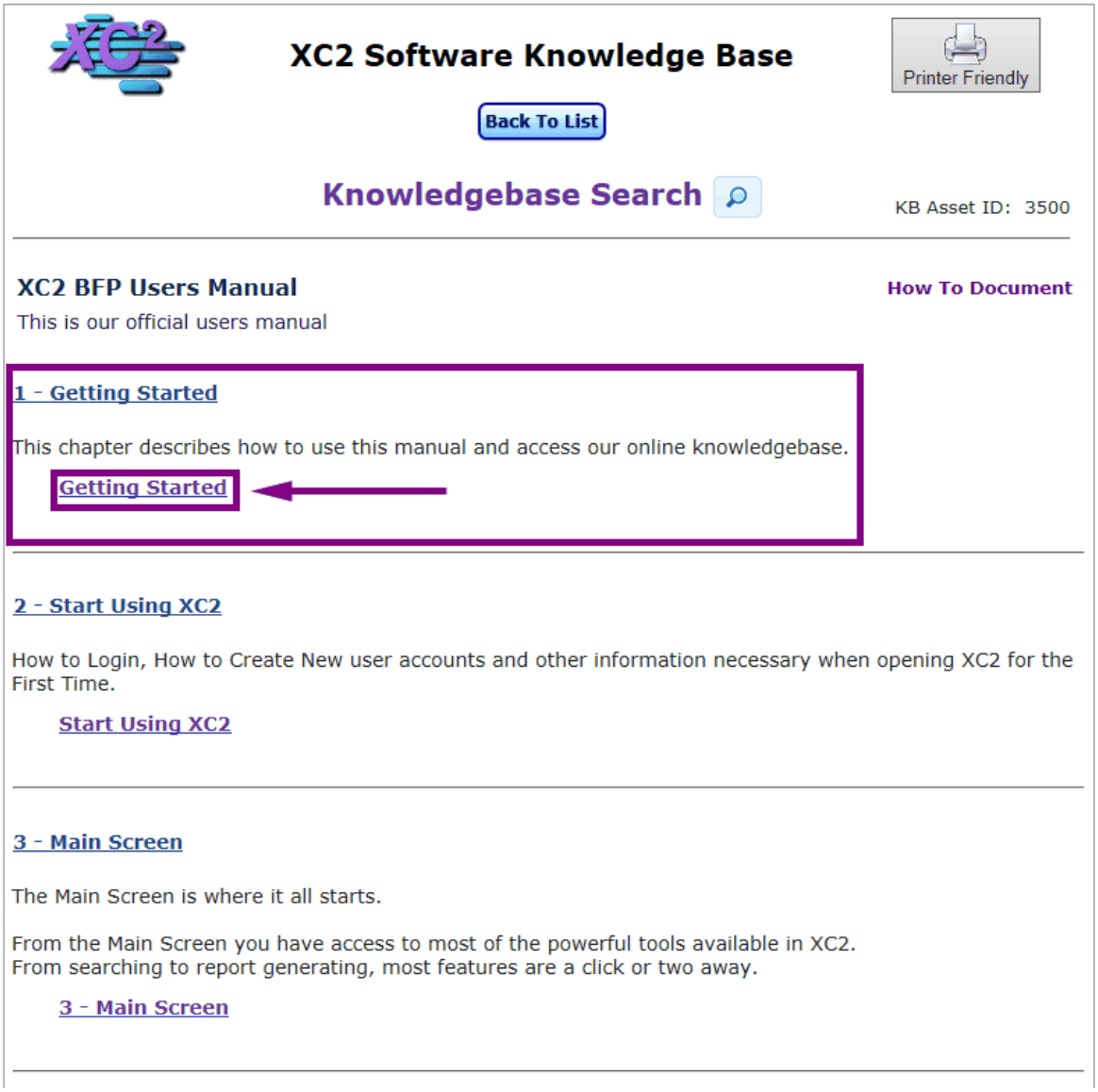
3 - Main Screen

Notes:

Chapters

This Guide is divided into chapters.

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

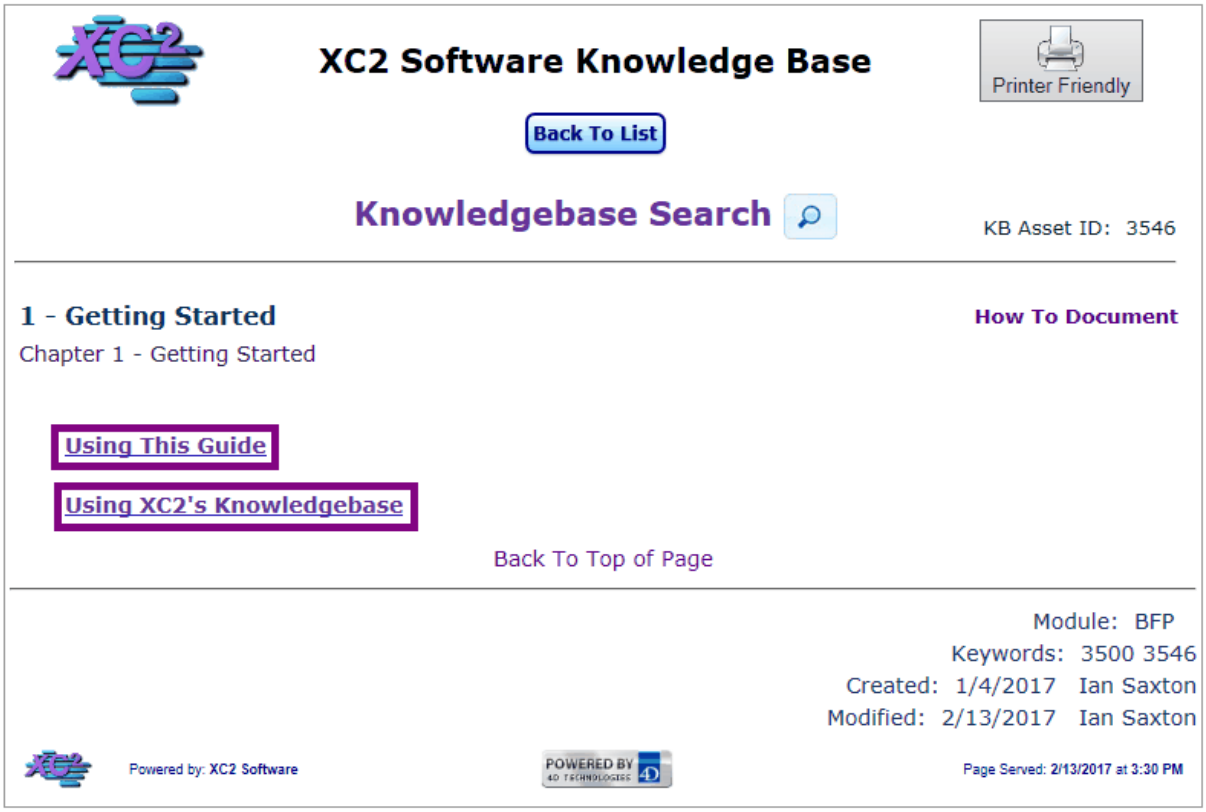


Notes:

Chapter Topics

Each Chapter will have its own topics.

Click a topic to view the page

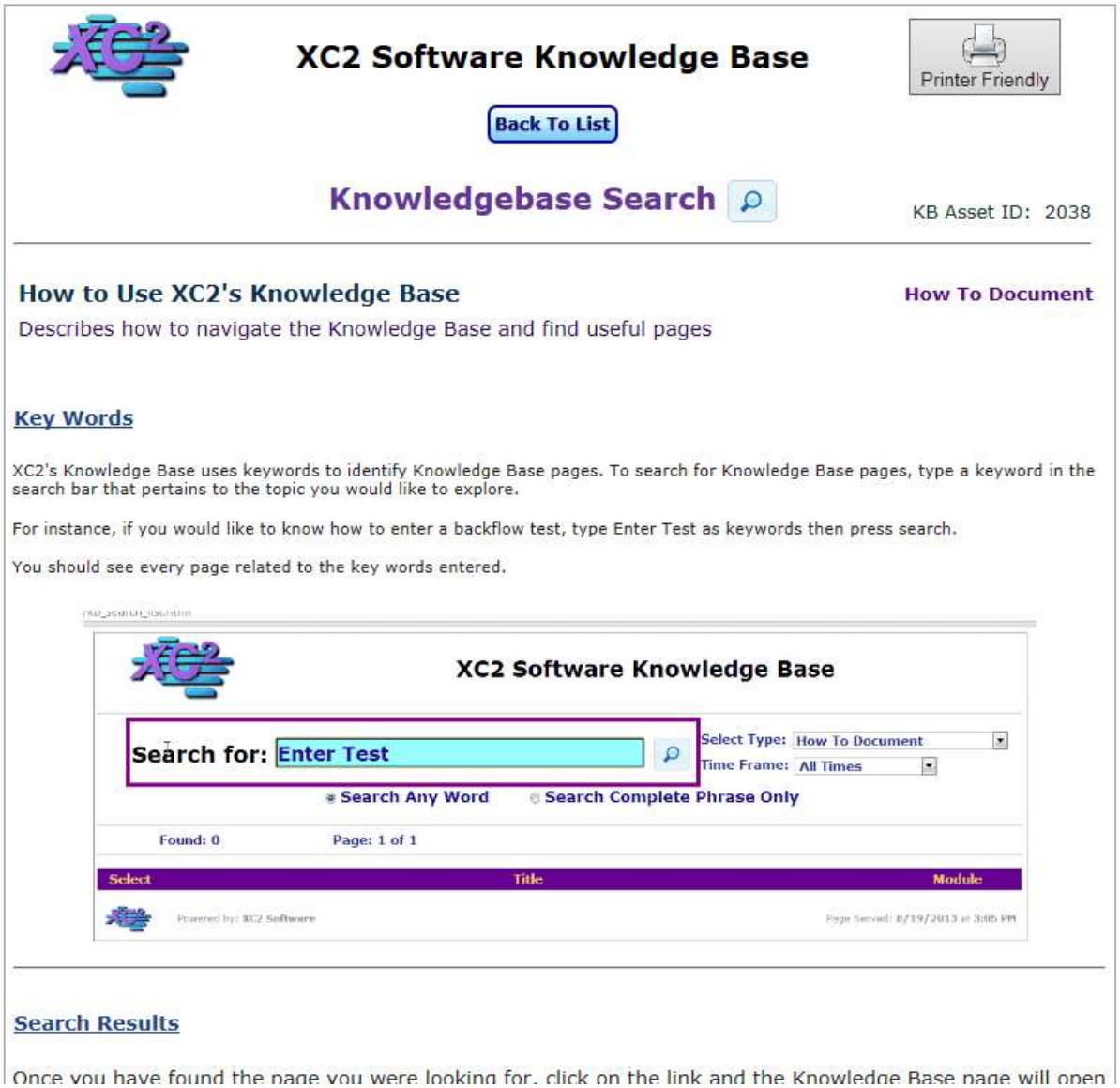


Notes:

Topic Page

Each Topic will have its own Web Page

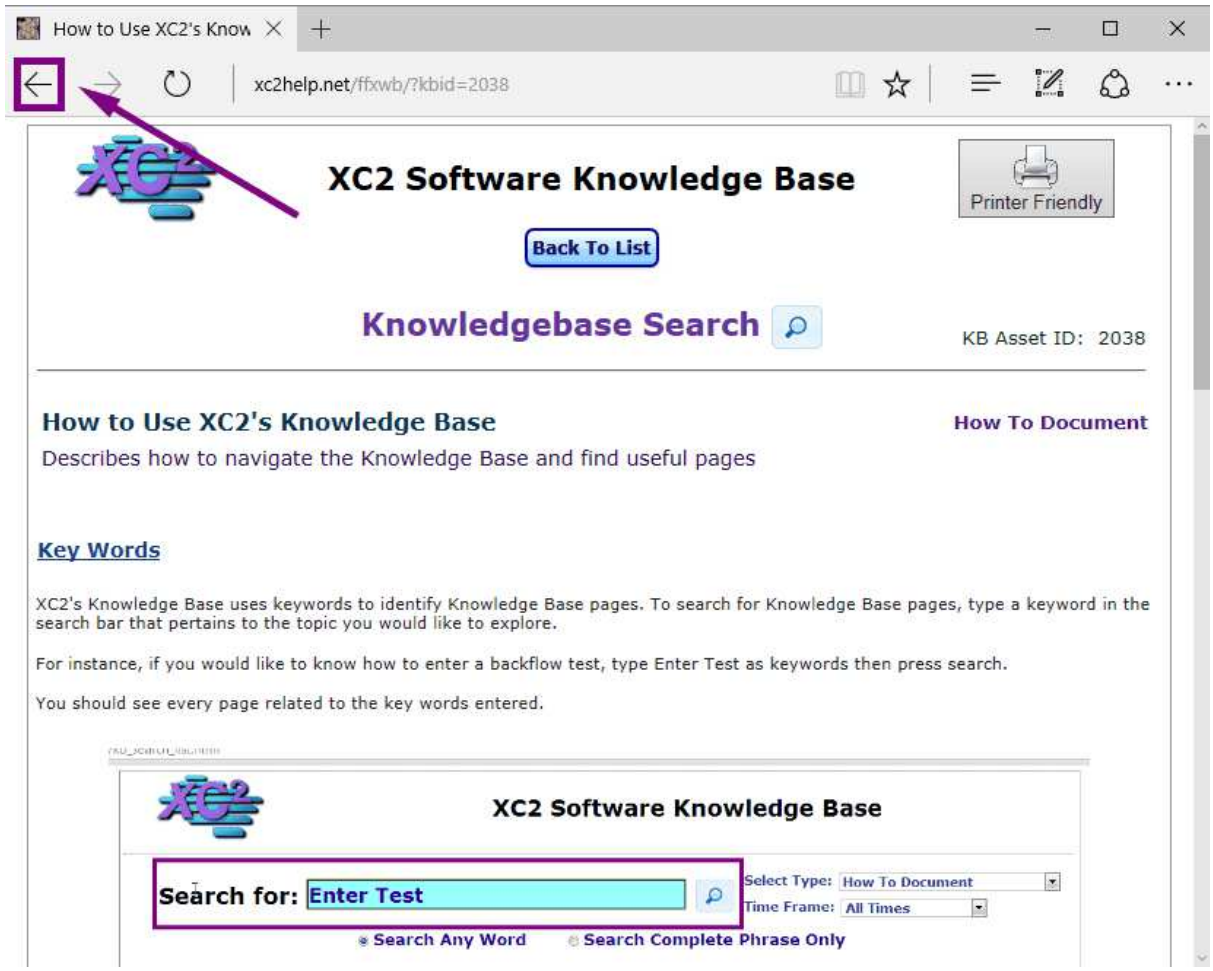
Each Page has a description of the Topic with Screenshots directing "how to"



Notes:

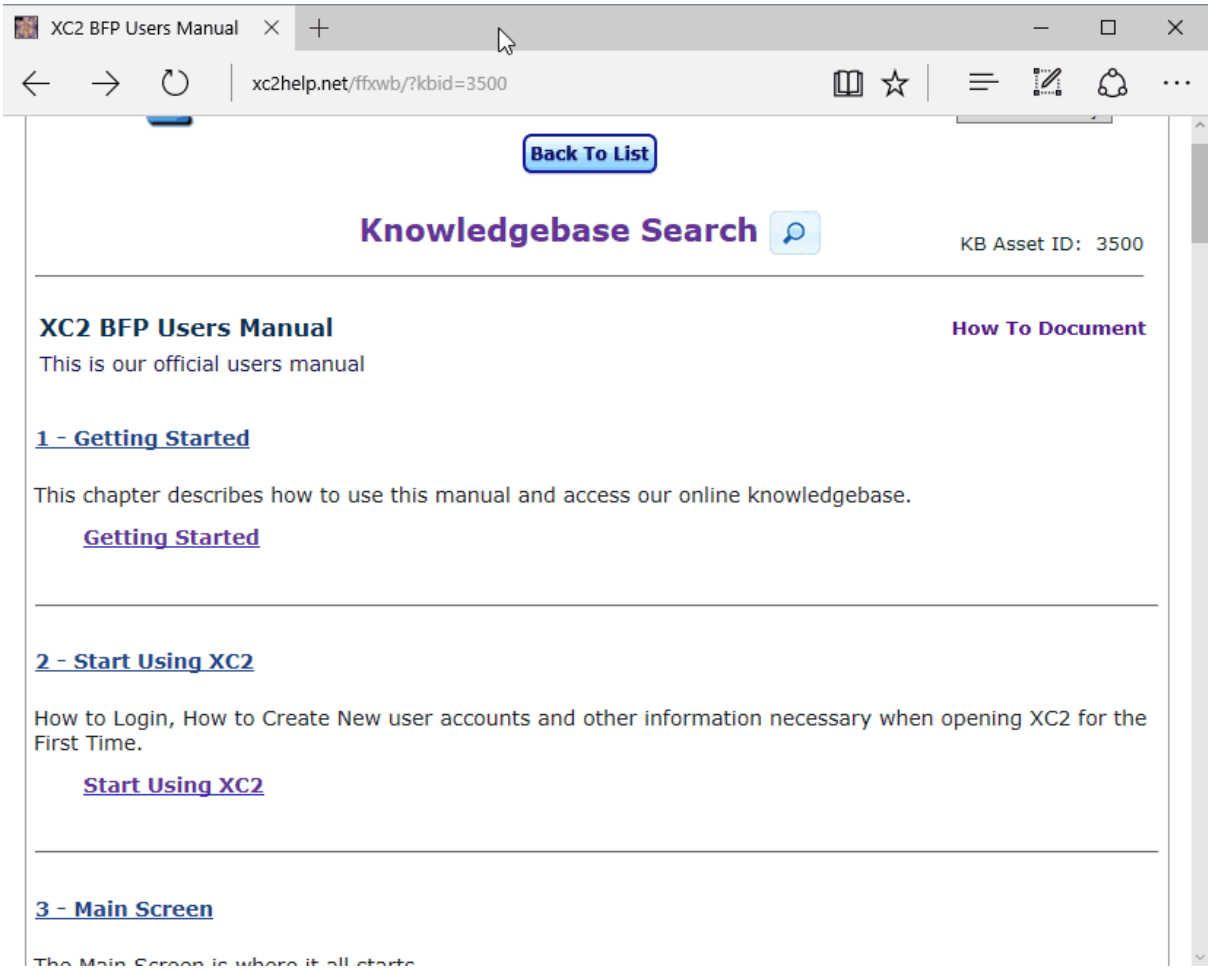
Getting Back to the Table of Contents

In your web browser, click the back button Twice



Notes:

You will be taked back to the table of contenets



Notes:

XC2 Software Knowledge Base

How to Use XC2's Knowledge Base

KB Asset ID: 2038

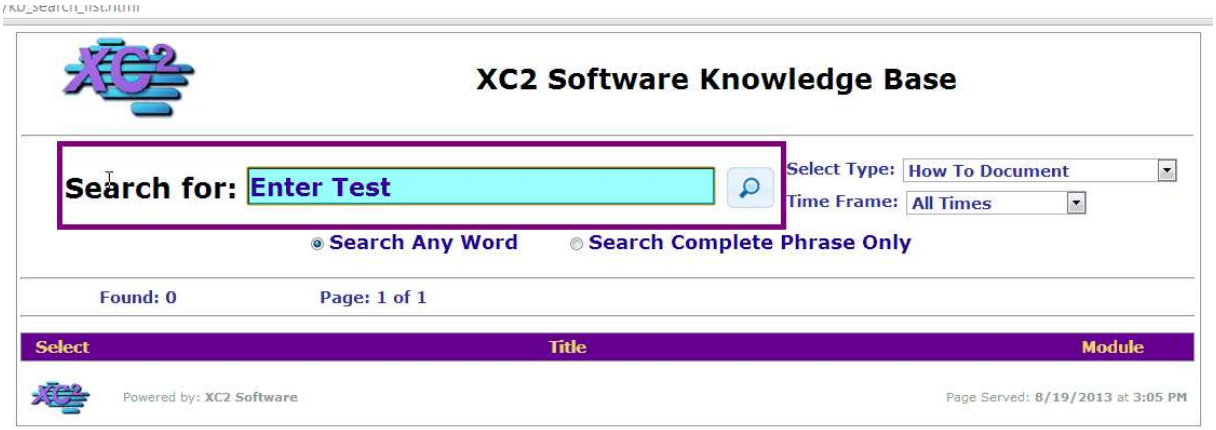
Describes how to navigate the Knowledge Base and find useful pages

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.

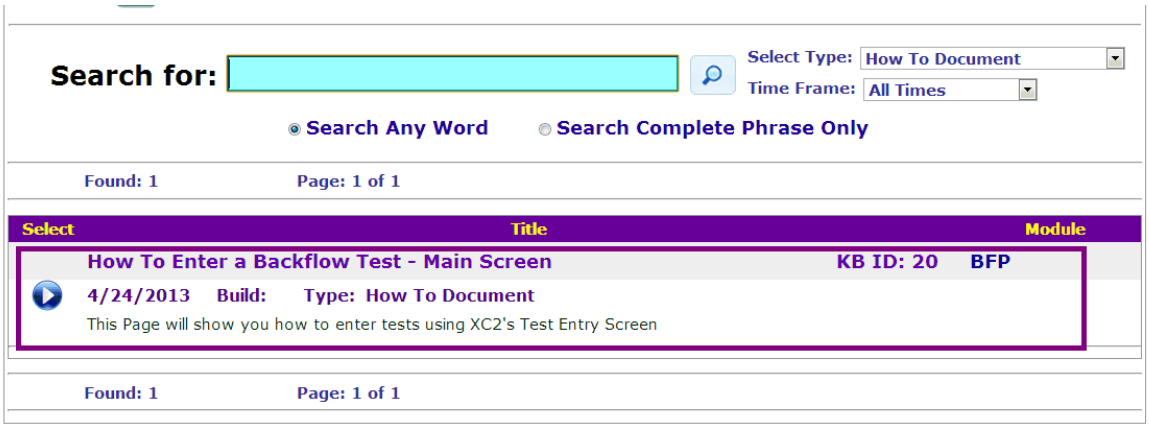
You should see every page related to the key words entered.



Notes:

Search Results

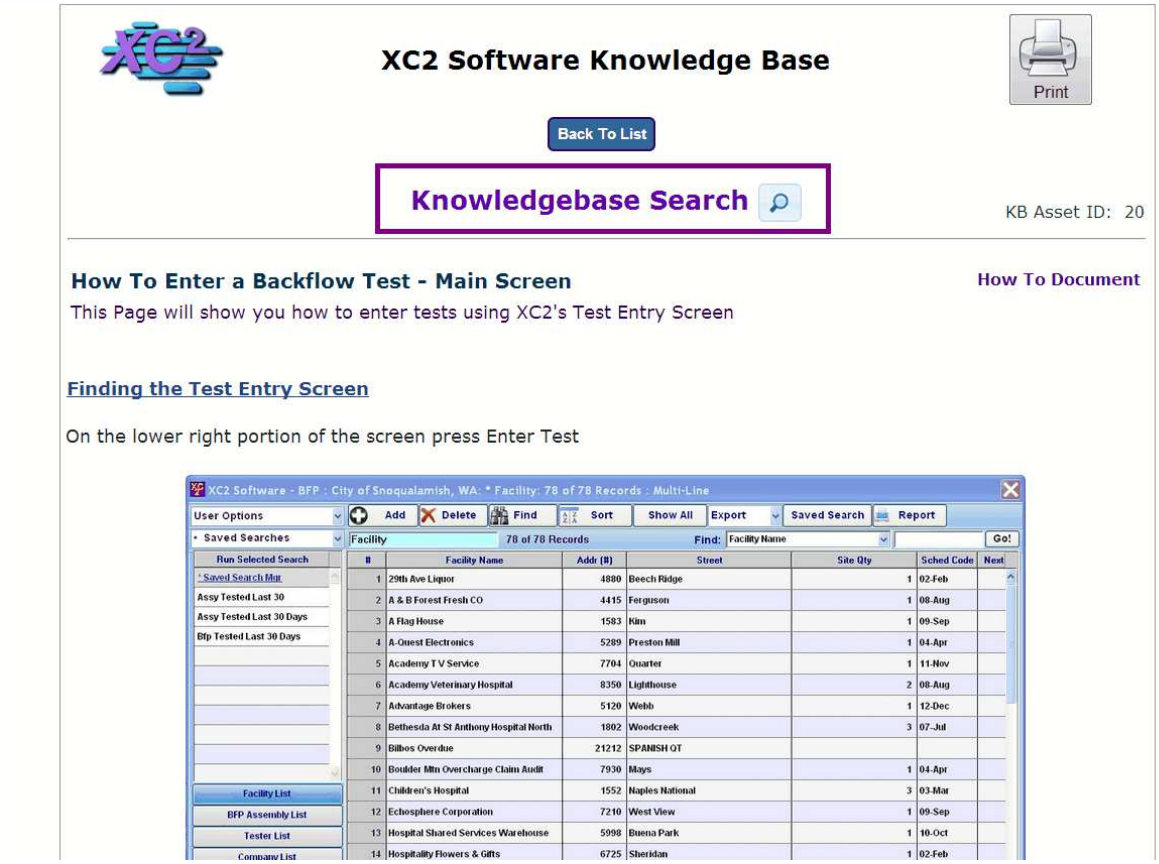
Once you have found the page you were looking for, click on the link and the Knowledge Base page will open



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.



Notes:

XC2 Software Knowledge Base

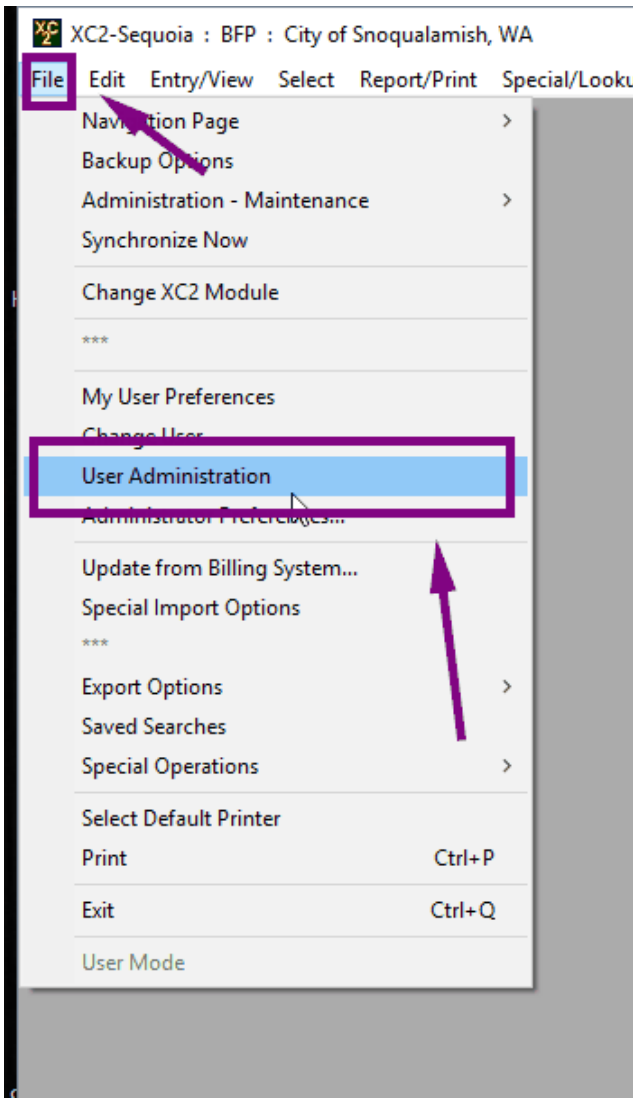
How To Grant a Utility Employee Web Access

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

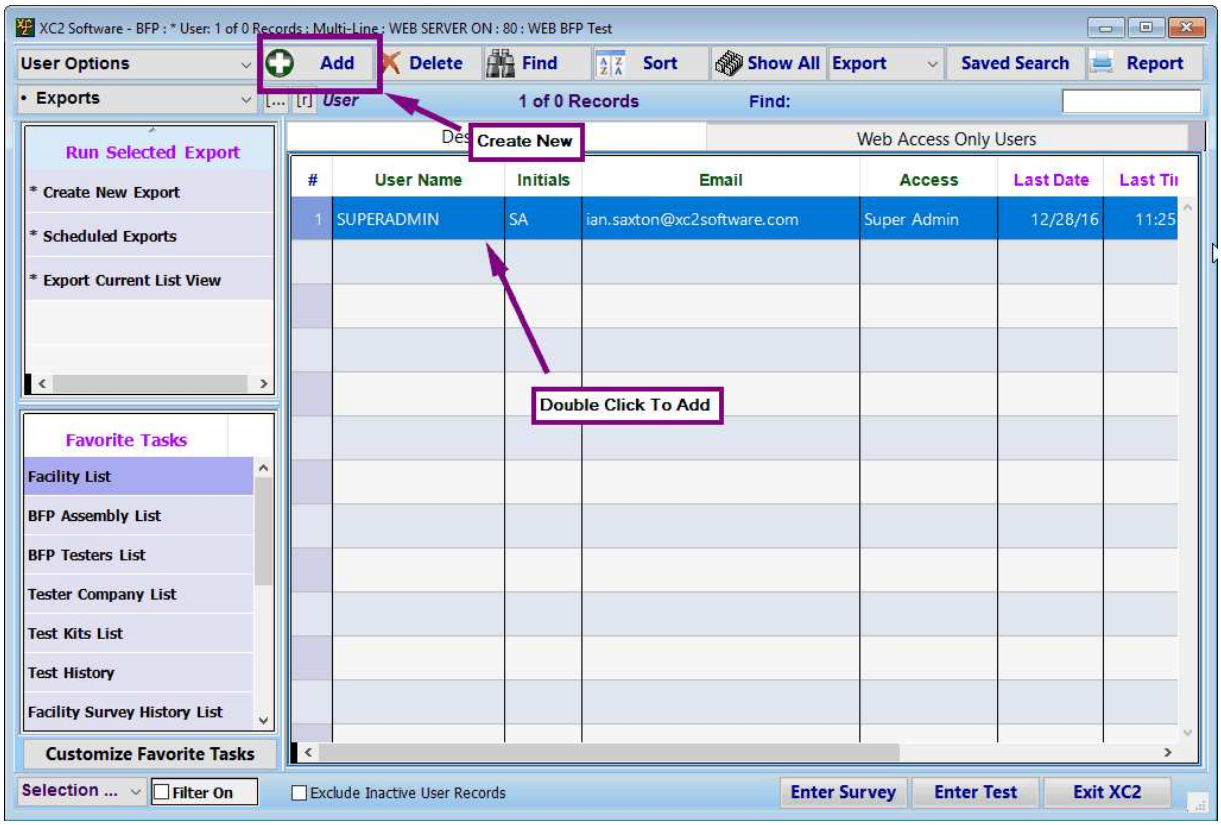


Notes:

Create New or Edit Current

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

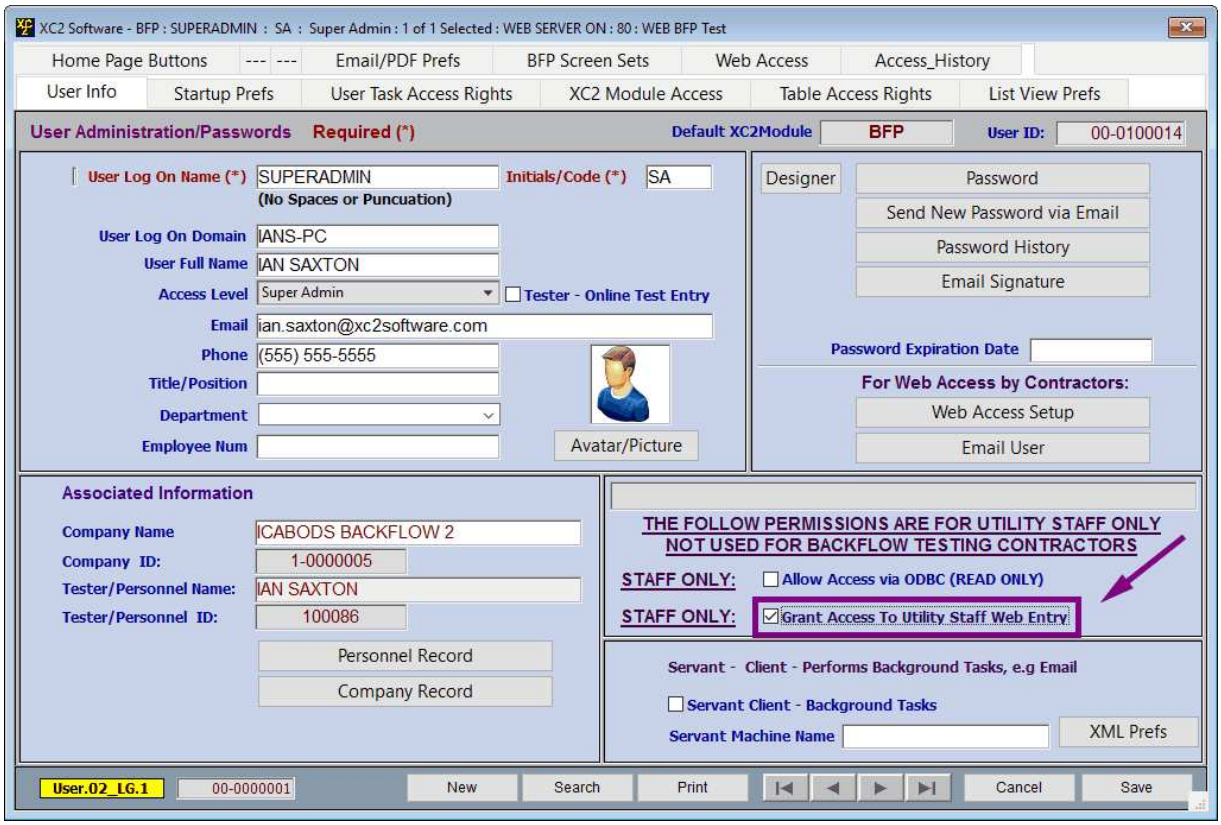
Click New to Create a New account
or
Double Click a current account to add this feature



Notes:

Grant Access to Web

Click this box to grant Web access to the user



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

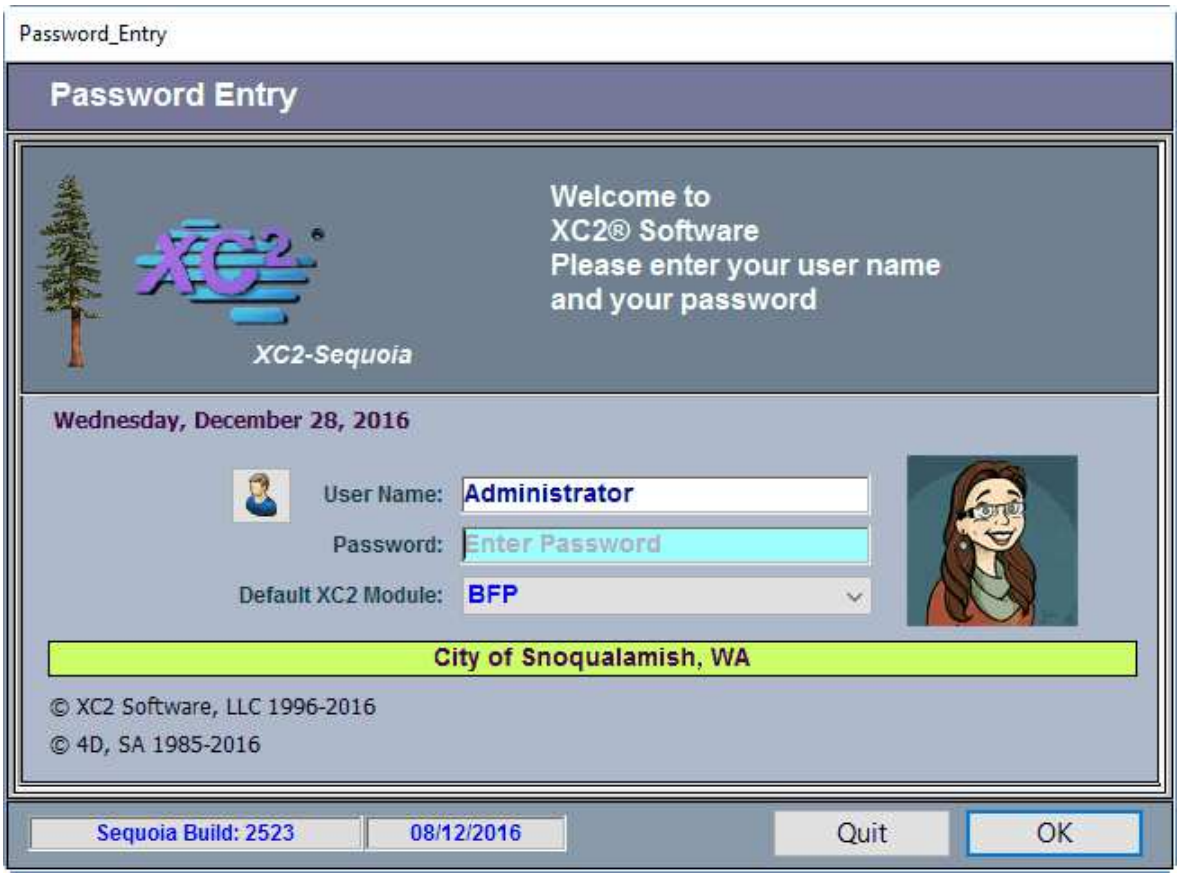
KB Asset ID: 3512

User login

The Login Screen

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

User Name (required)
Password (optional)

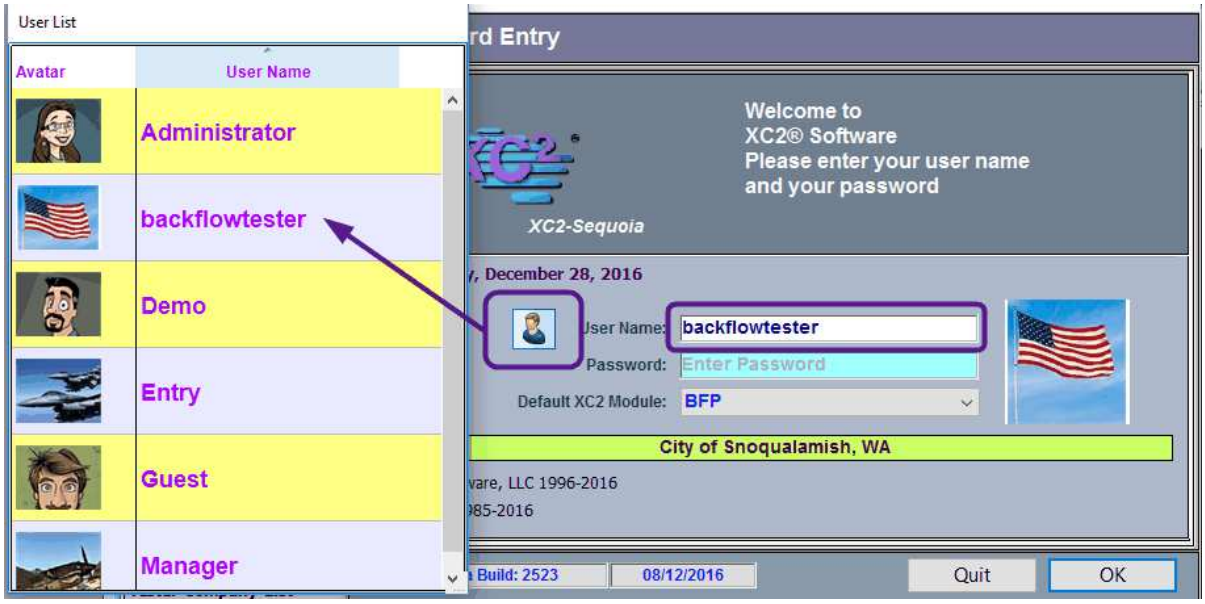


Notes:

Entering User or Account Name

There are a couple options when entering the user name

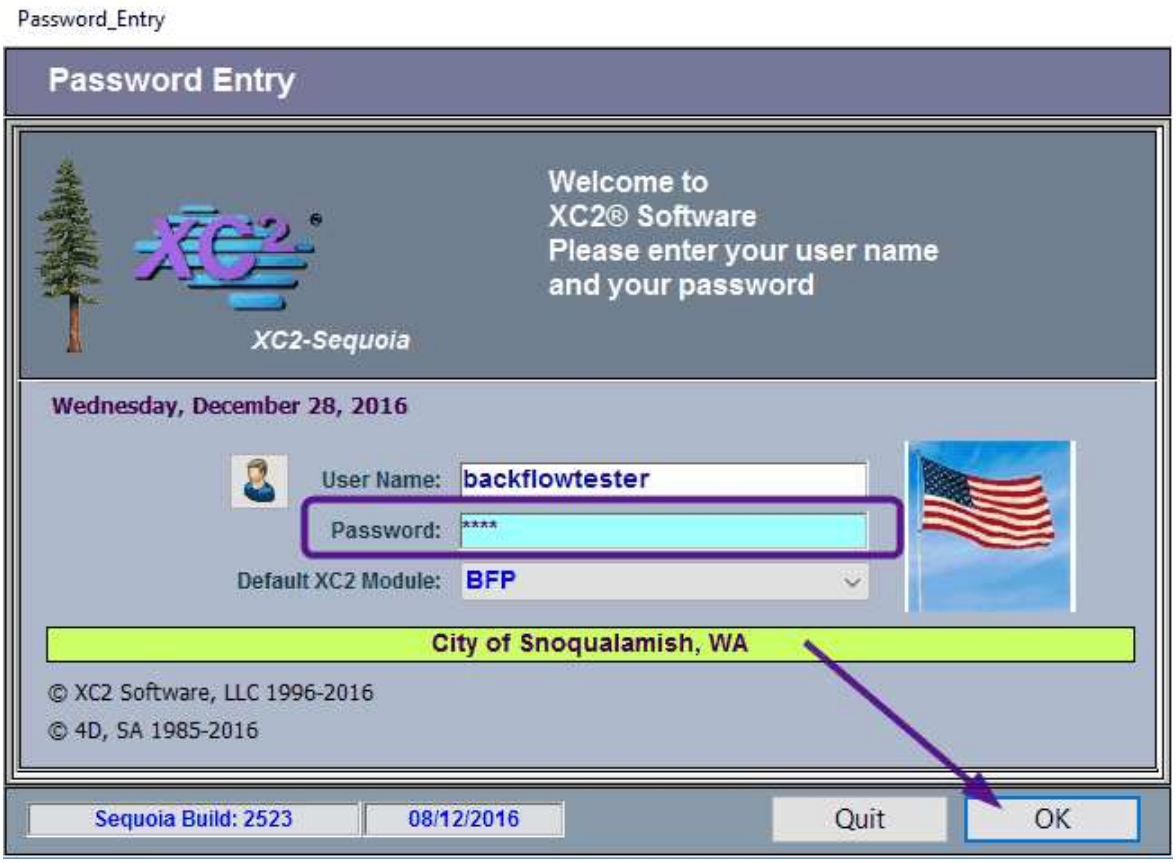
- Type in users name
- Click on the Avatar button to select user account



Notes:

Enter User Password (if required)

Click OK



Notes:

XC2 Software Knowledge Base

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

KB Asset ID: 33

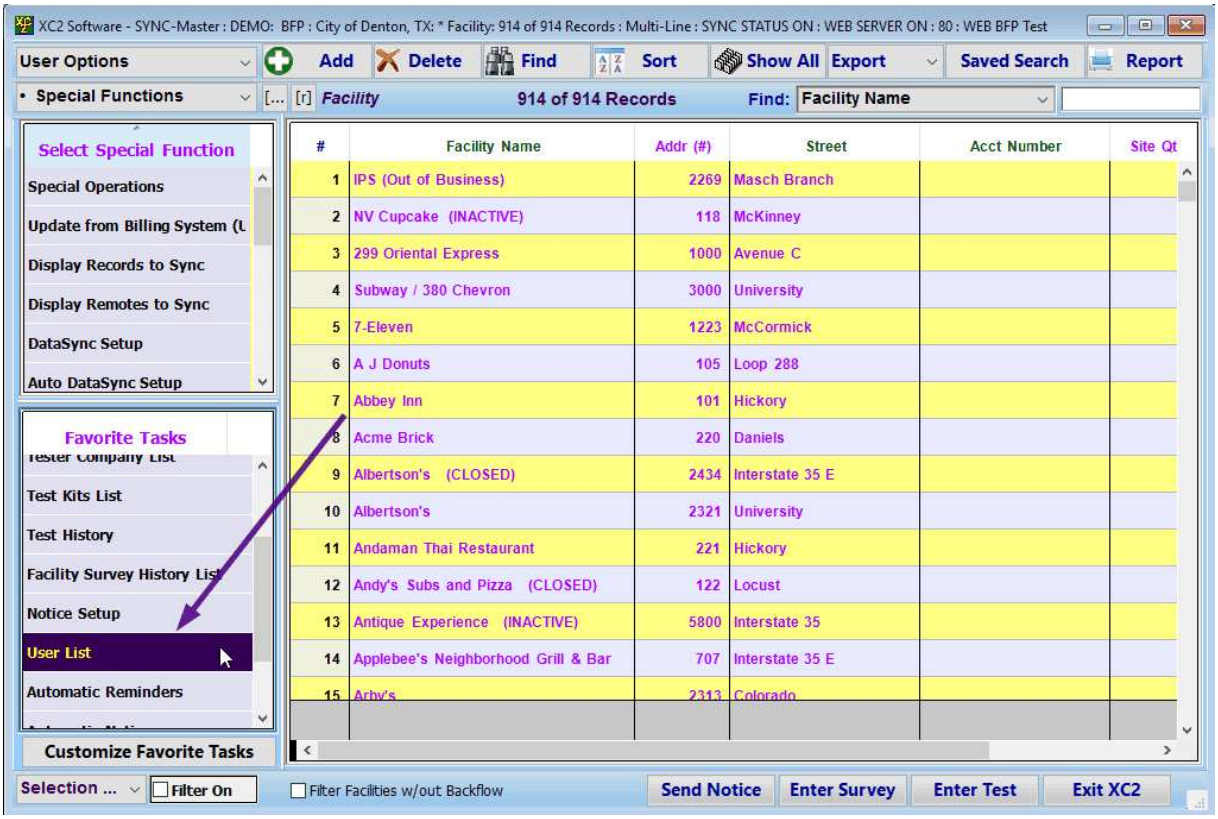
This Page Describes How to setup a New User Account or Make Changes to an Existing Account

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

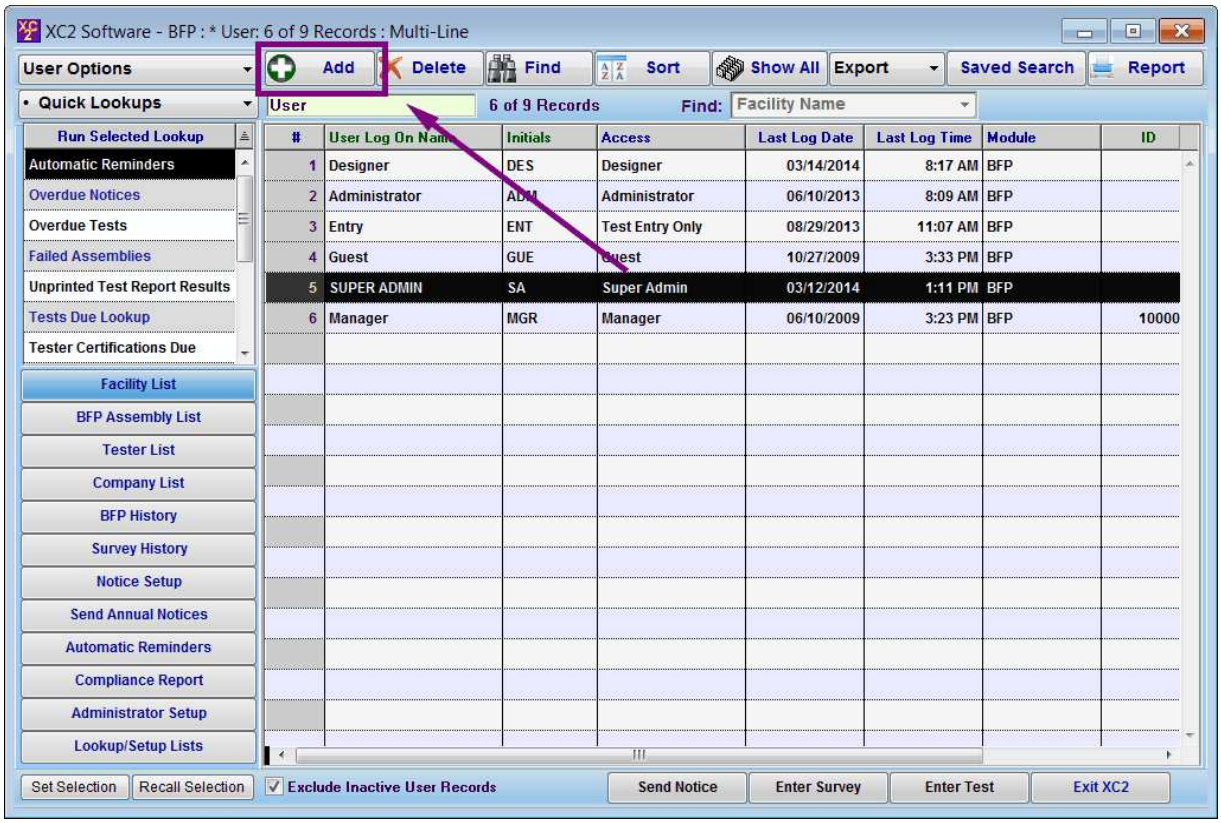
- Scroll through Favorite Tasks list
- Double click User List



Notes:

User Accounts

To create a new account click the Add button.



Notes:

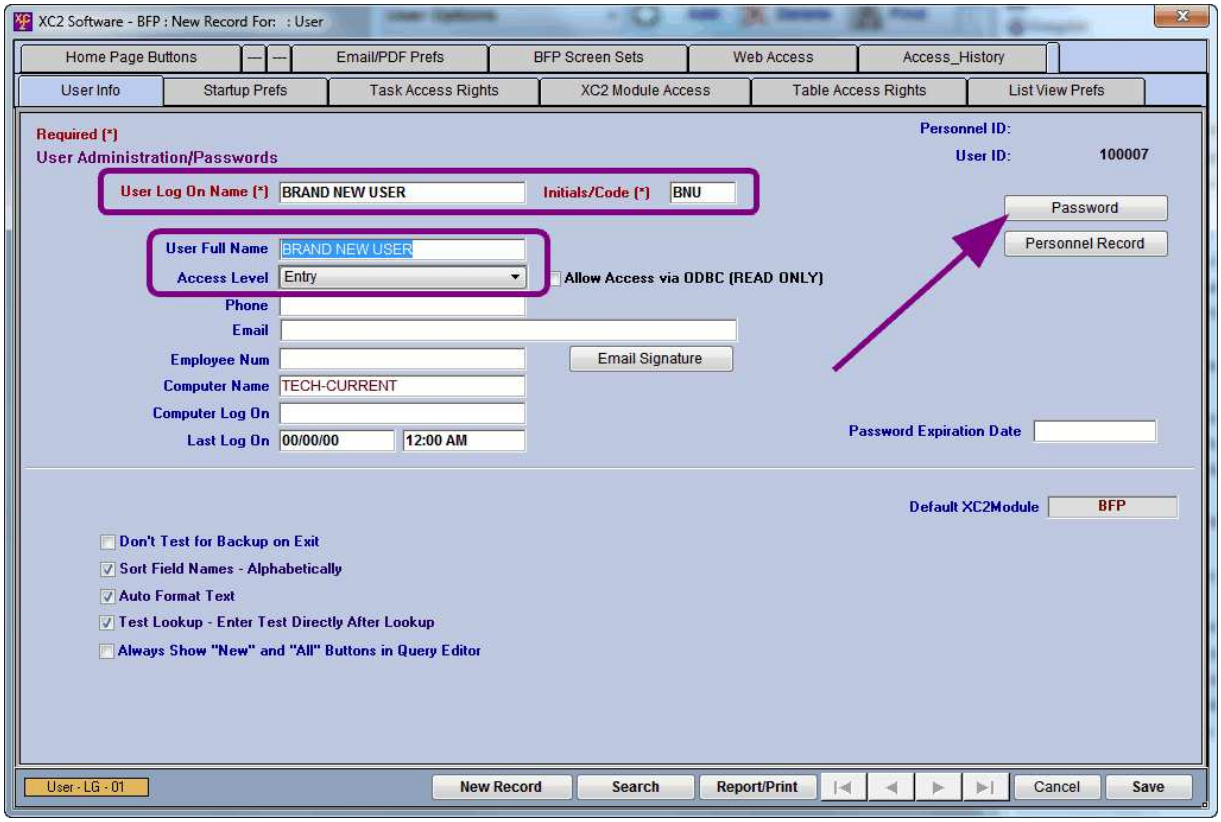
Personalize The Account

Enter the information for:

- User Login Name
- Access Level

If you would like to set the login password yourself

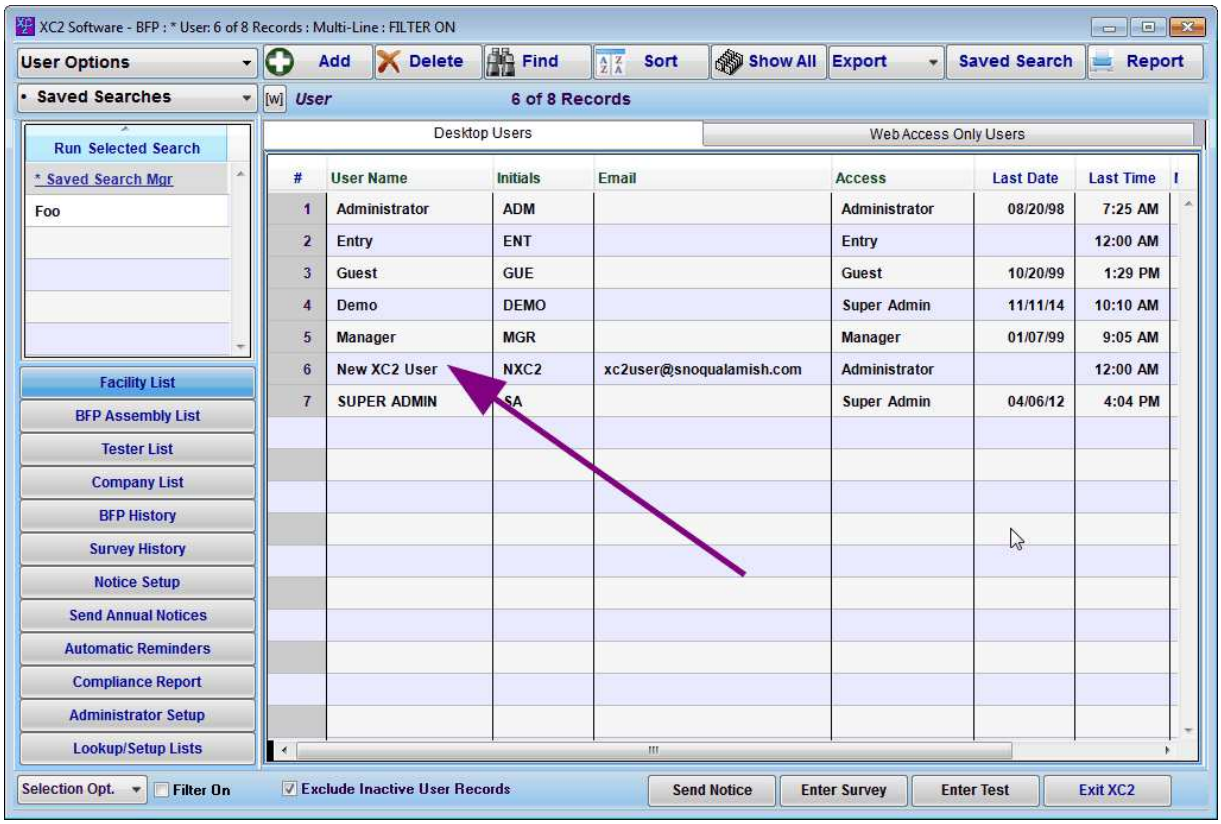
- Click the password Button on the top right corner



Notes:

New User

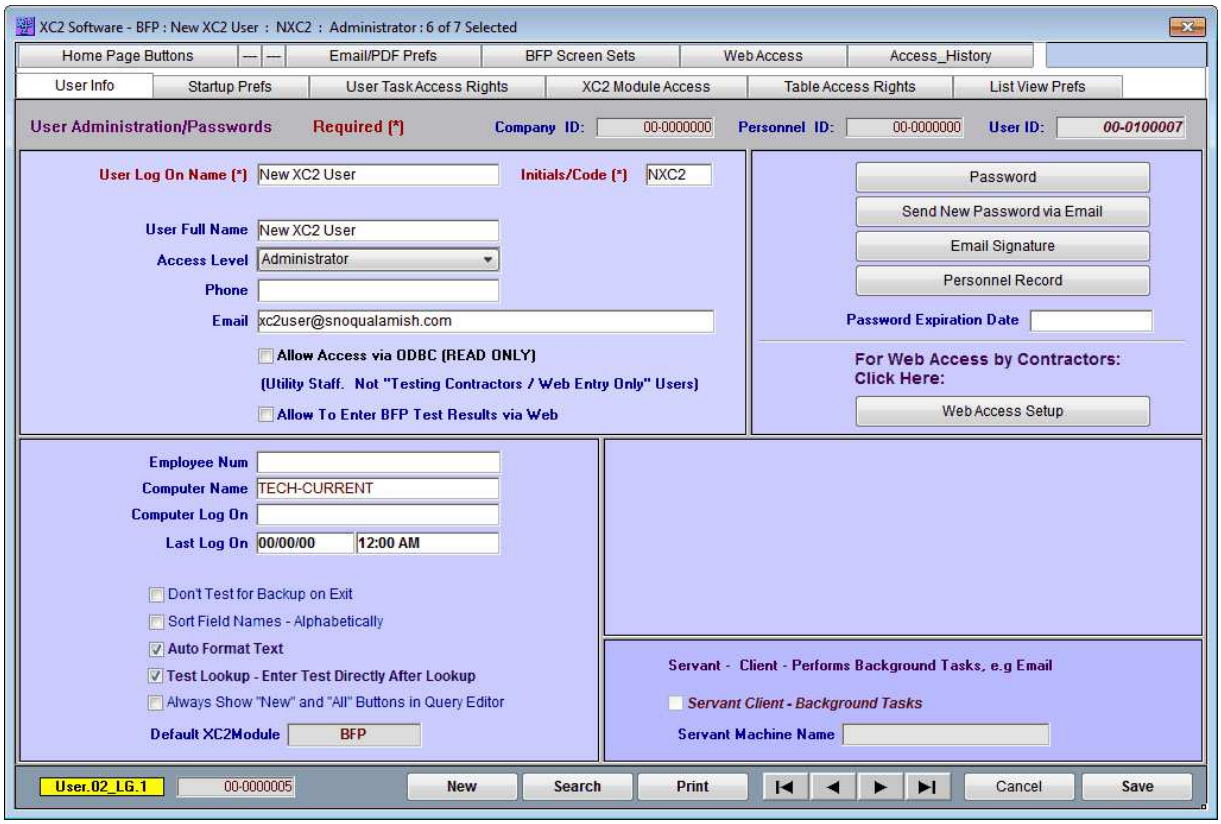
After you save the record, a new User will appear in the list.



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.



Notes:

XC2 Software Knowledge Base

Your Business Information

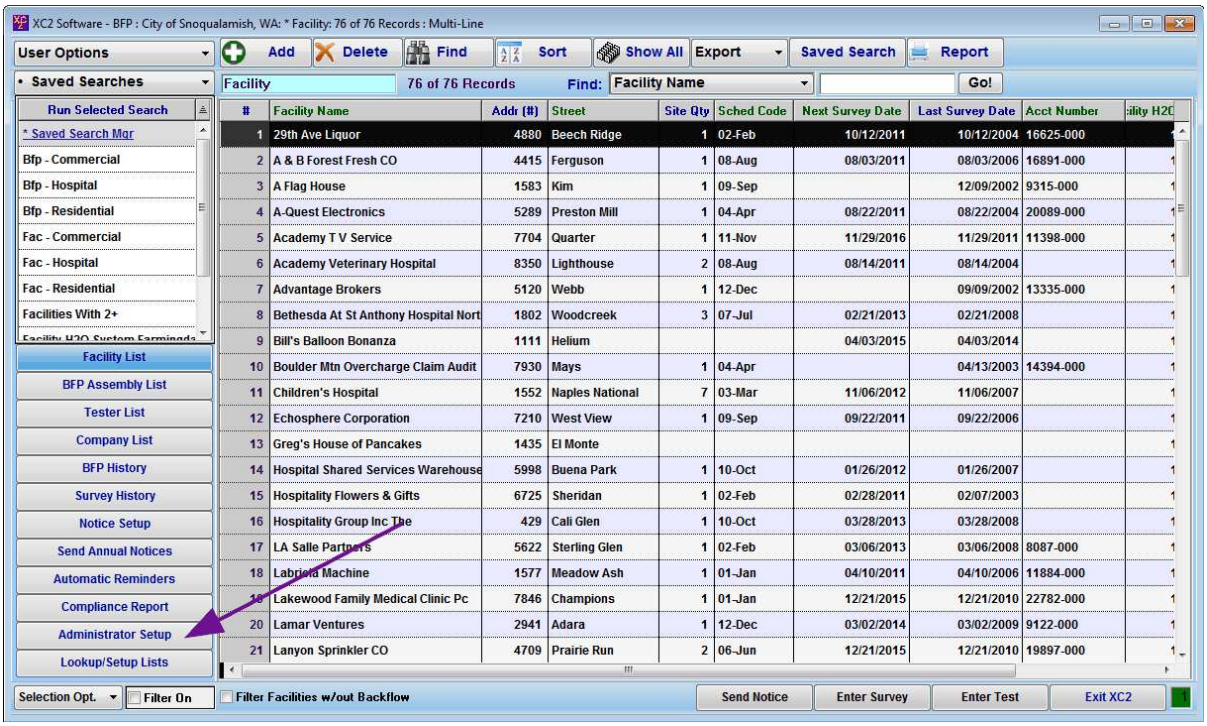
KB Asset ID: 2613

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,

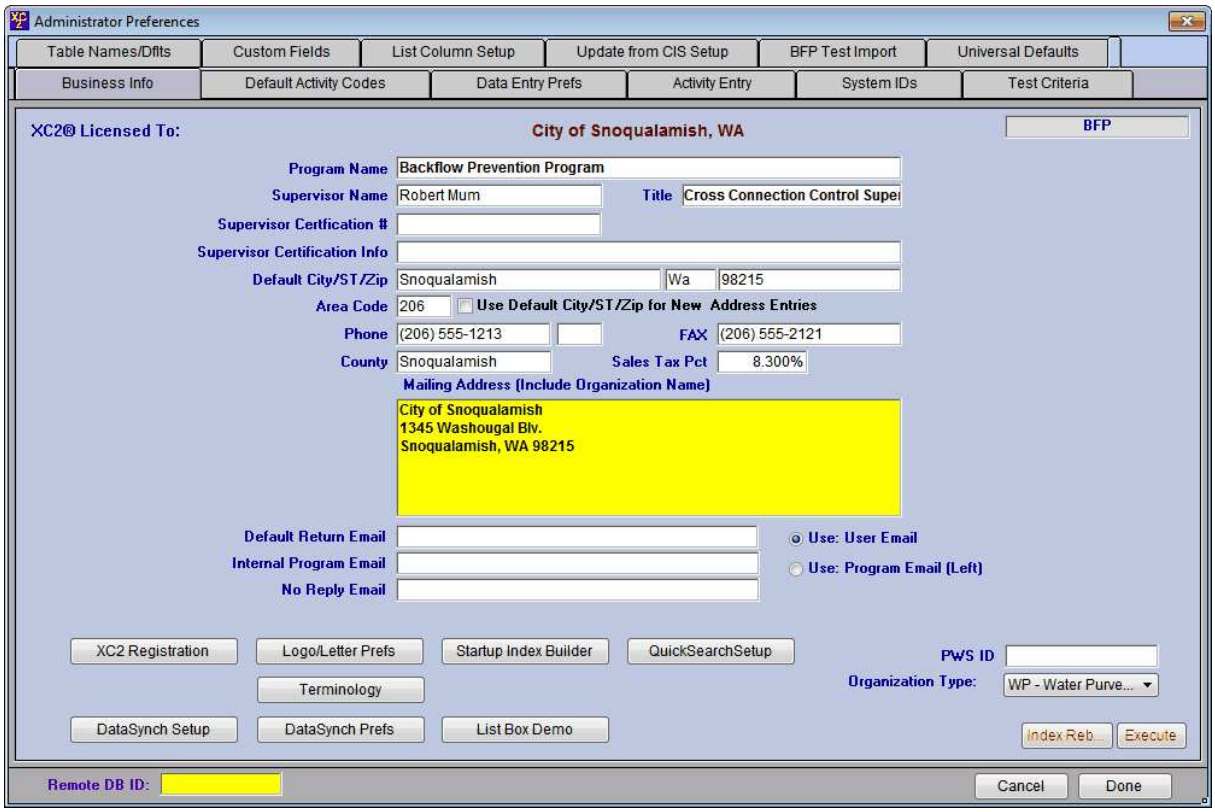
- Click Administrators Setup



Notes:

Adding Your Organizational Information

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



Notes:

XC2 Software Knowledge Base

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

KB Asset ID: 2859

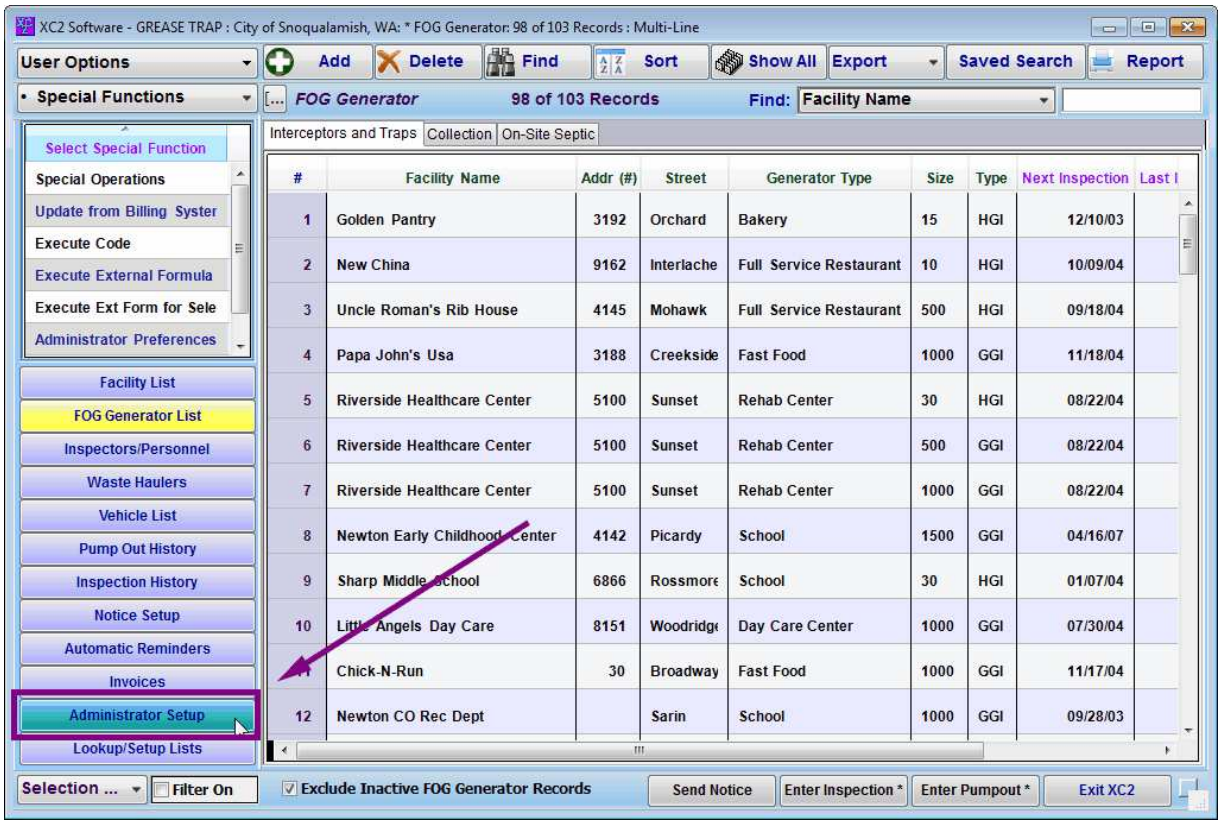
This page describes how to enter your organizations logo and or letterhead into XC2 FOG

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

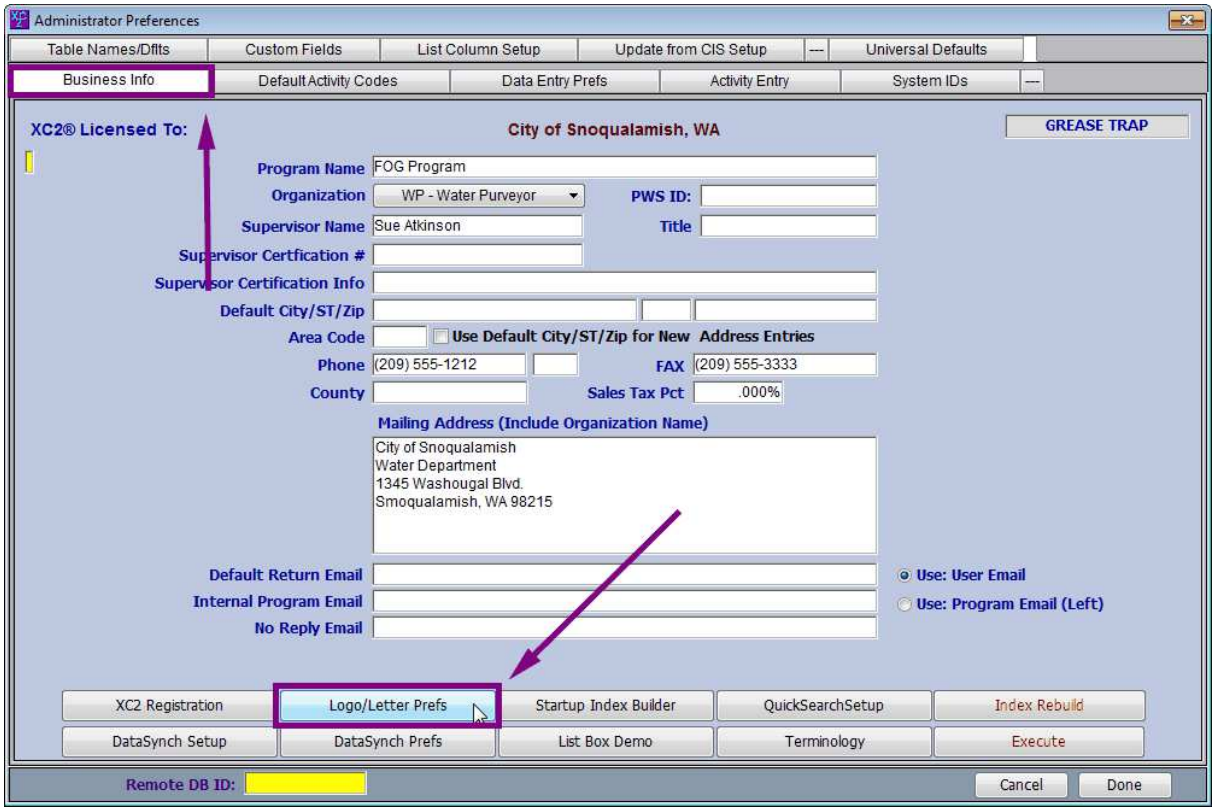


Notes:

Buisness Info Tab

Under Business Info

Click Logo/Letter Prefs

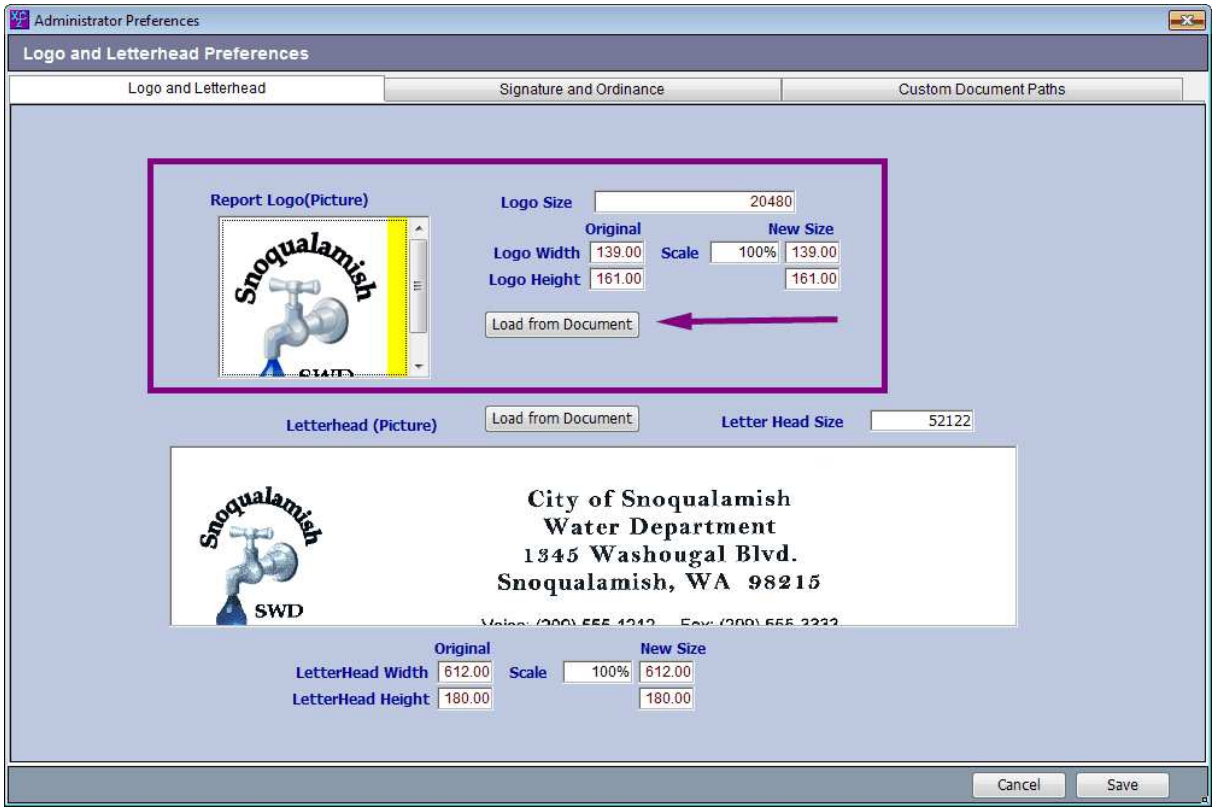


Notes:

Logo/Letter Prefs: Adding Logo

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

Click Load From Document then select your logo.

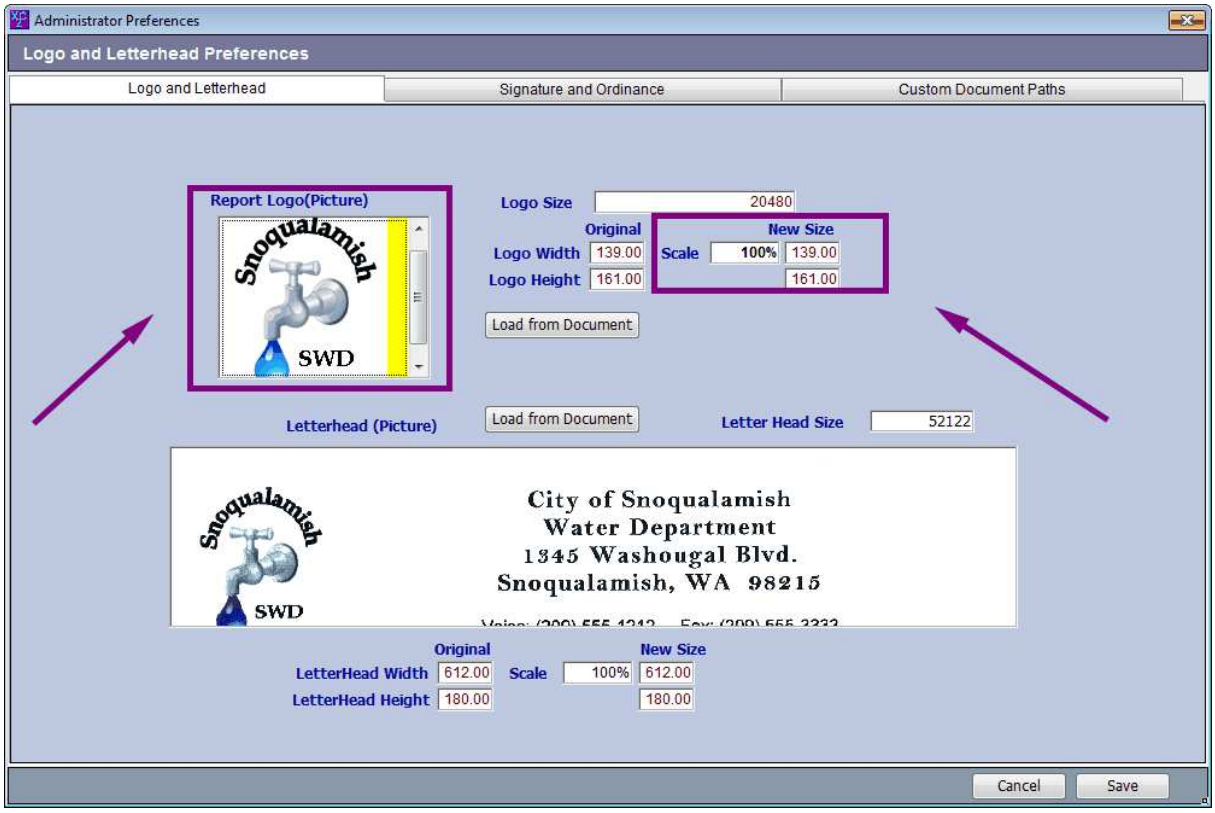


Notes:

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

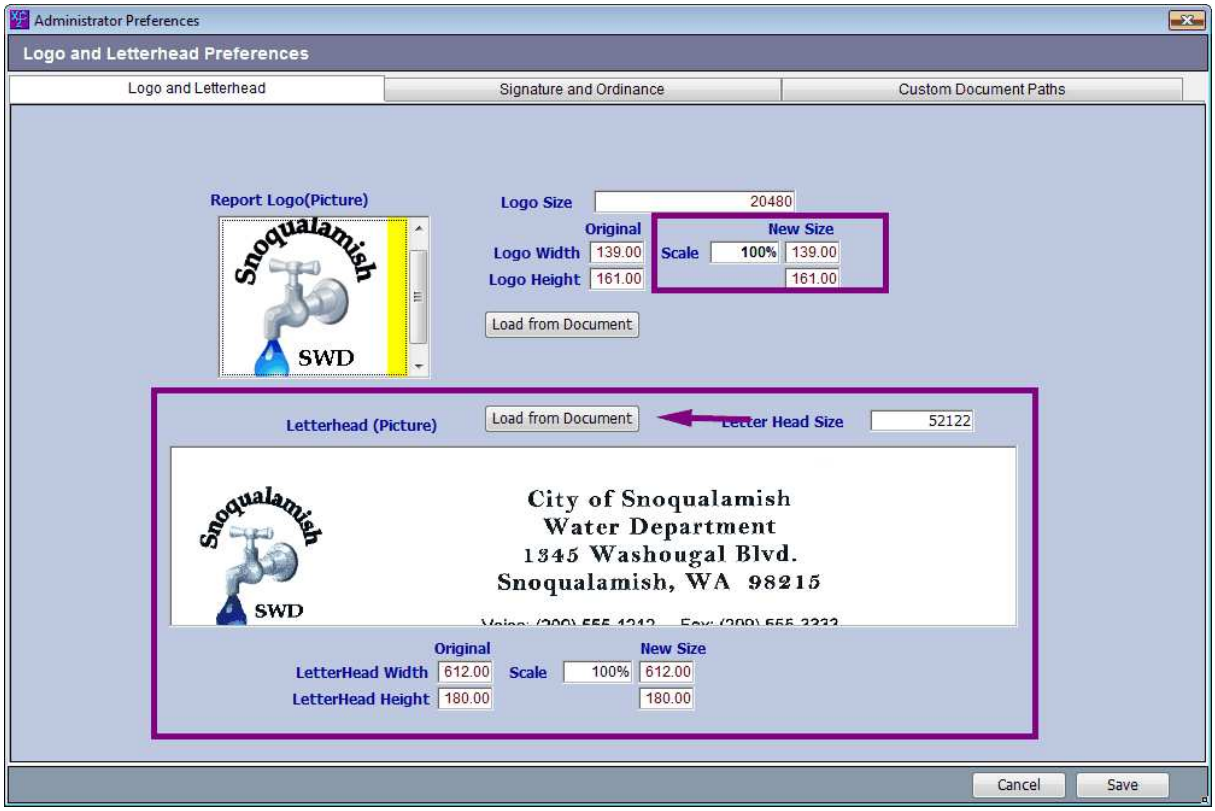


Notes:

Logo Letter Prefs: Letterhead

The Letterhead portion is located on the bottom of the screen

Click Load from document to add your letterhead.



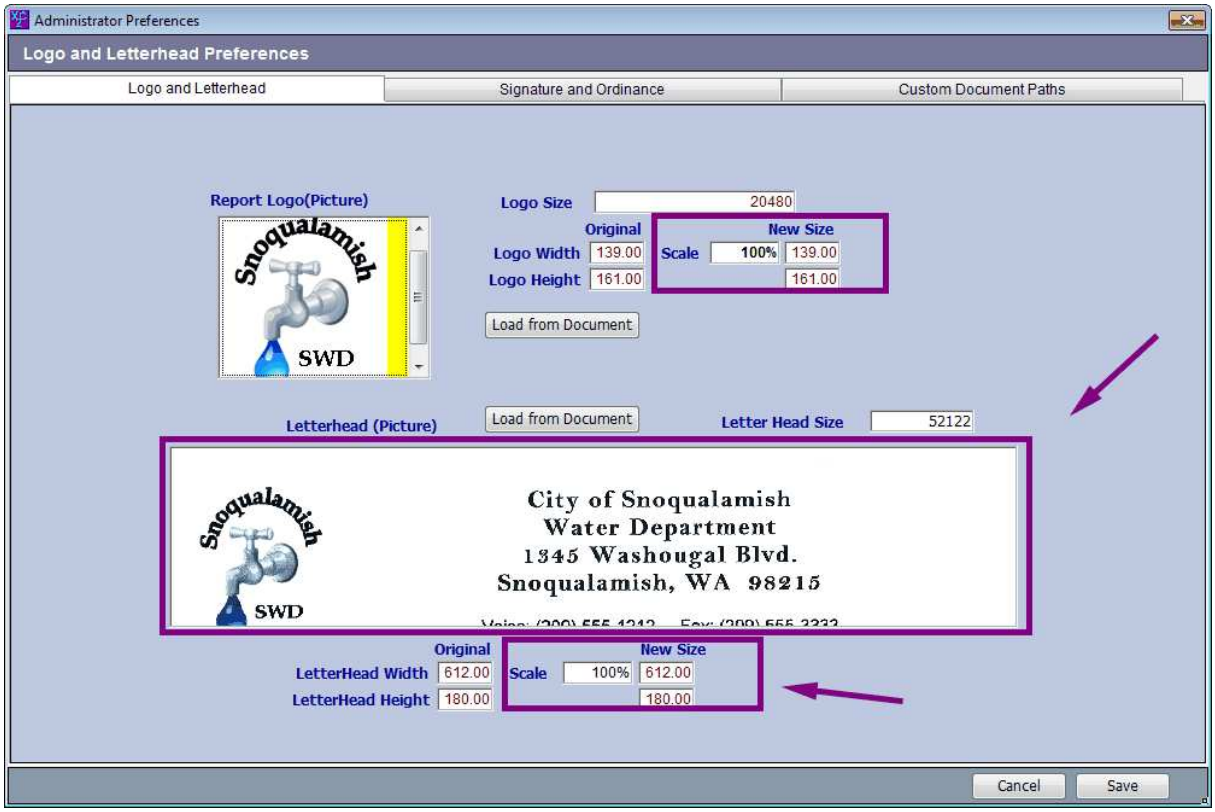
Notes:

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 desigated 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

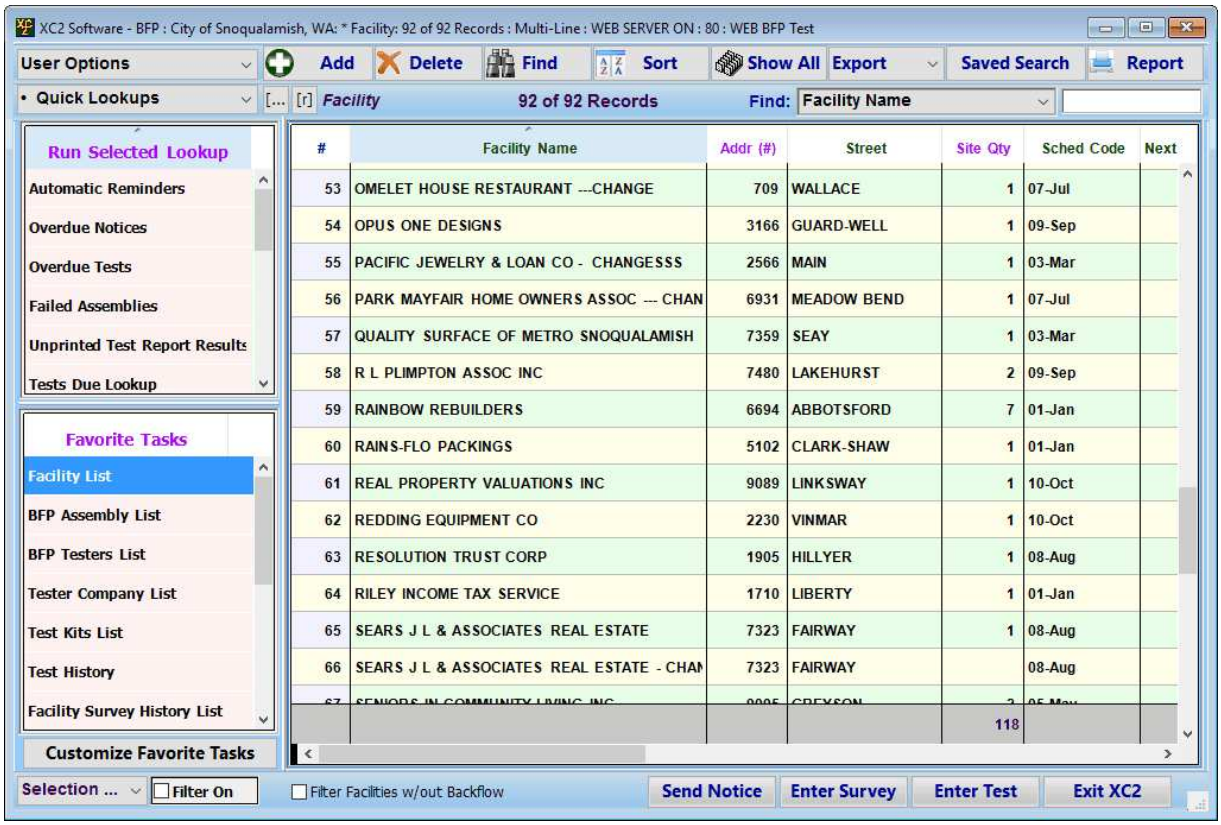
This page serves as in introduction to XC2's Main Screen

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



Notes:

XC2 Software Knowledge Base

Main Page Features

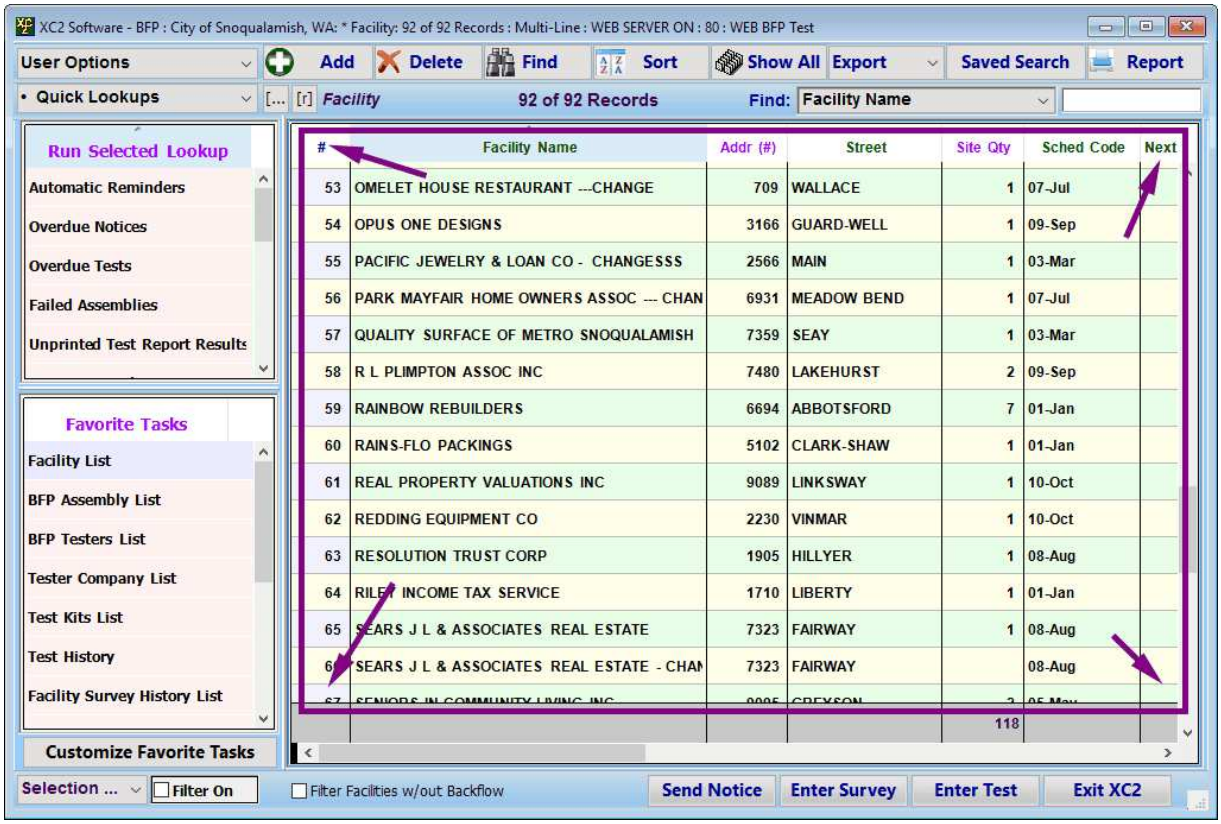
KB Asset ID: 2594

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 you main viewing area for all records.

Here you can view records as a list

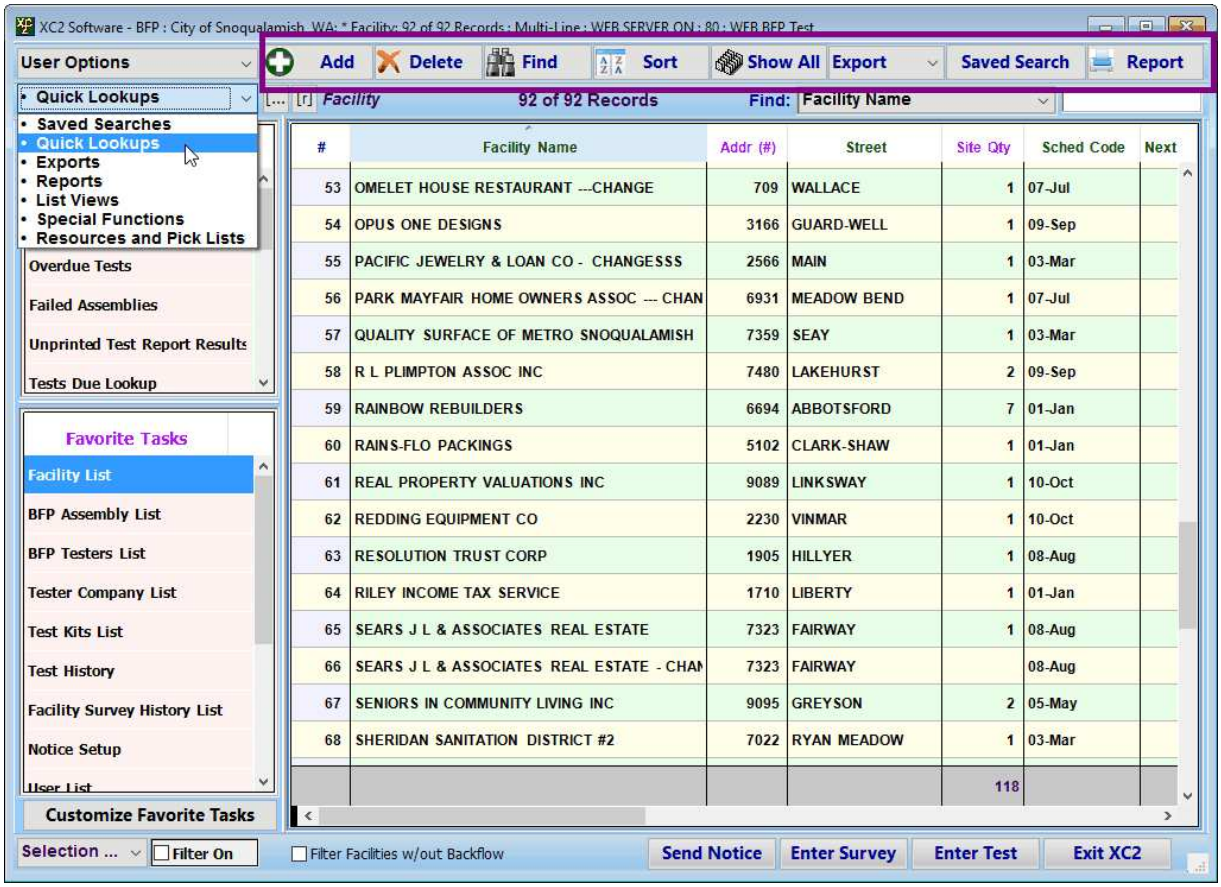


Notes:

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



Notes:

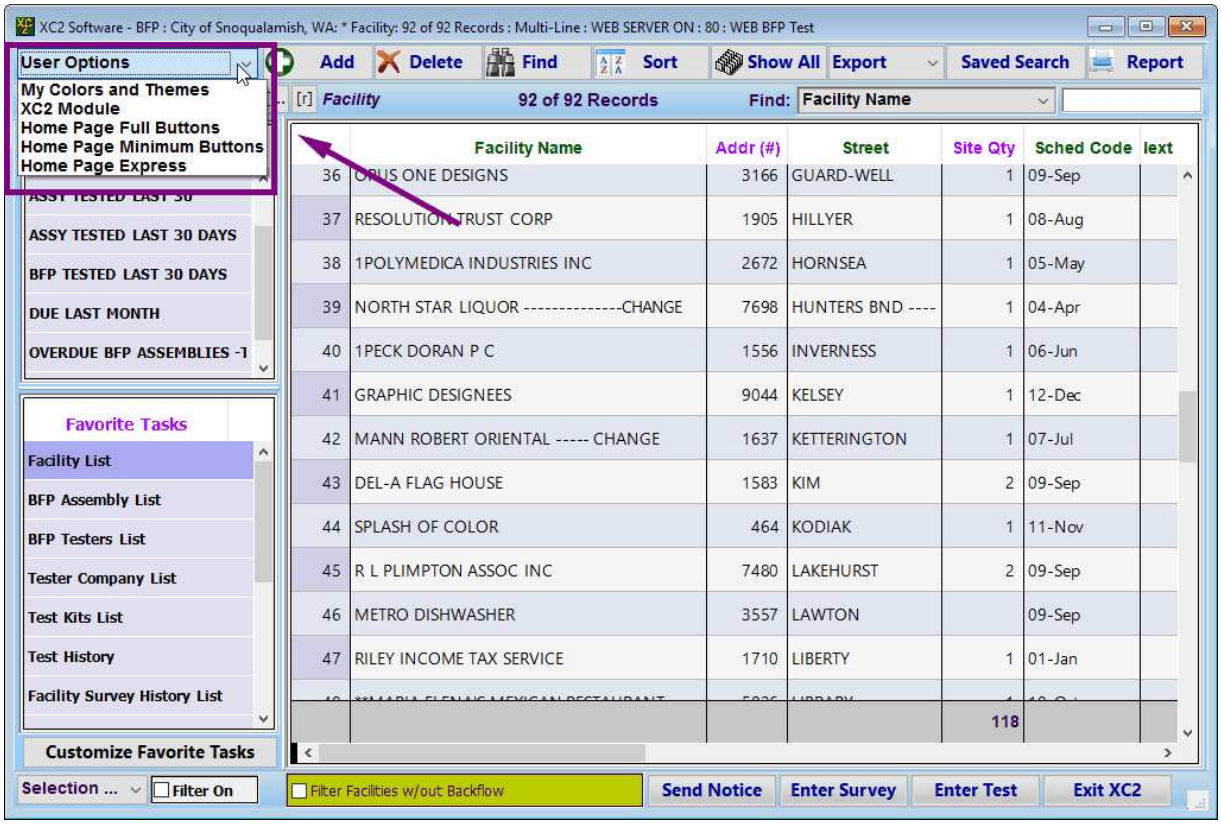
User Options

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



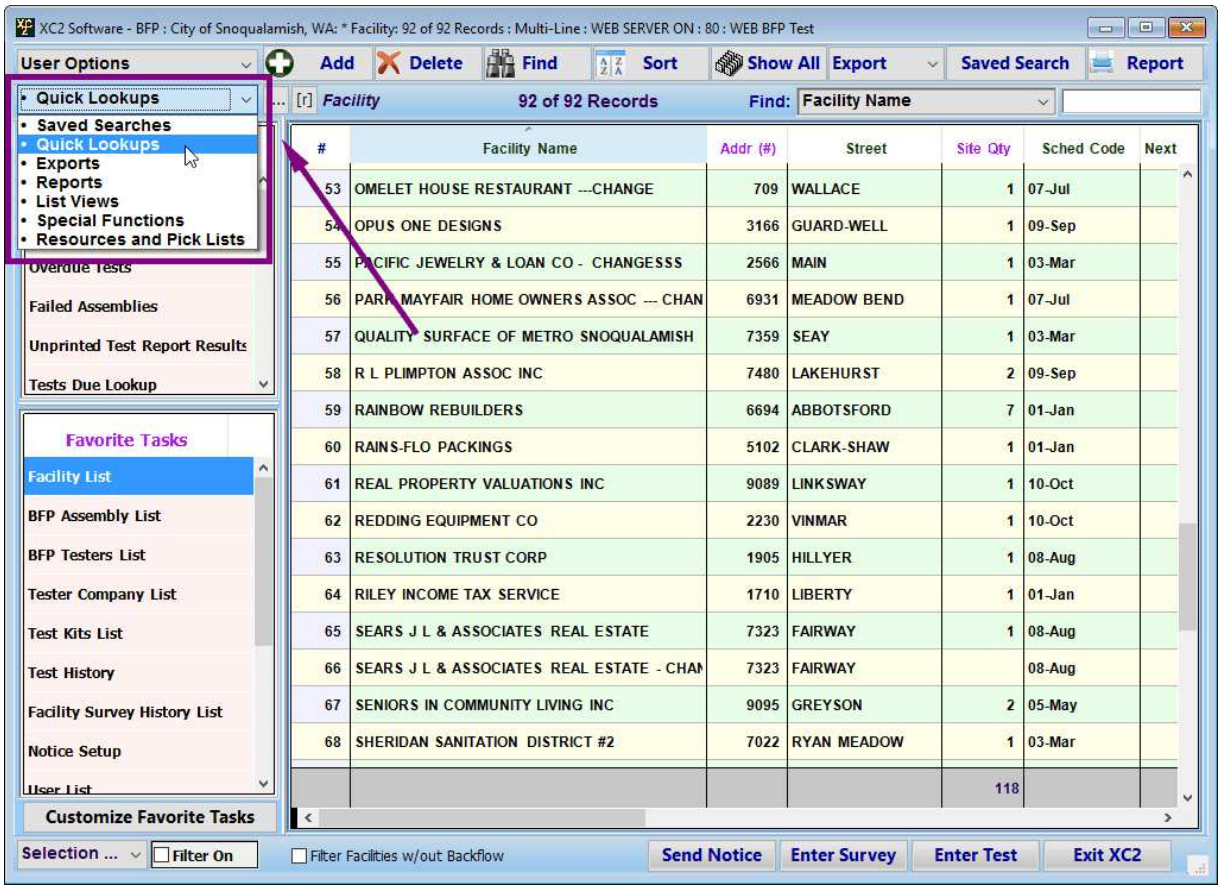
Notes:

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



Notes:

Favorite Tasks

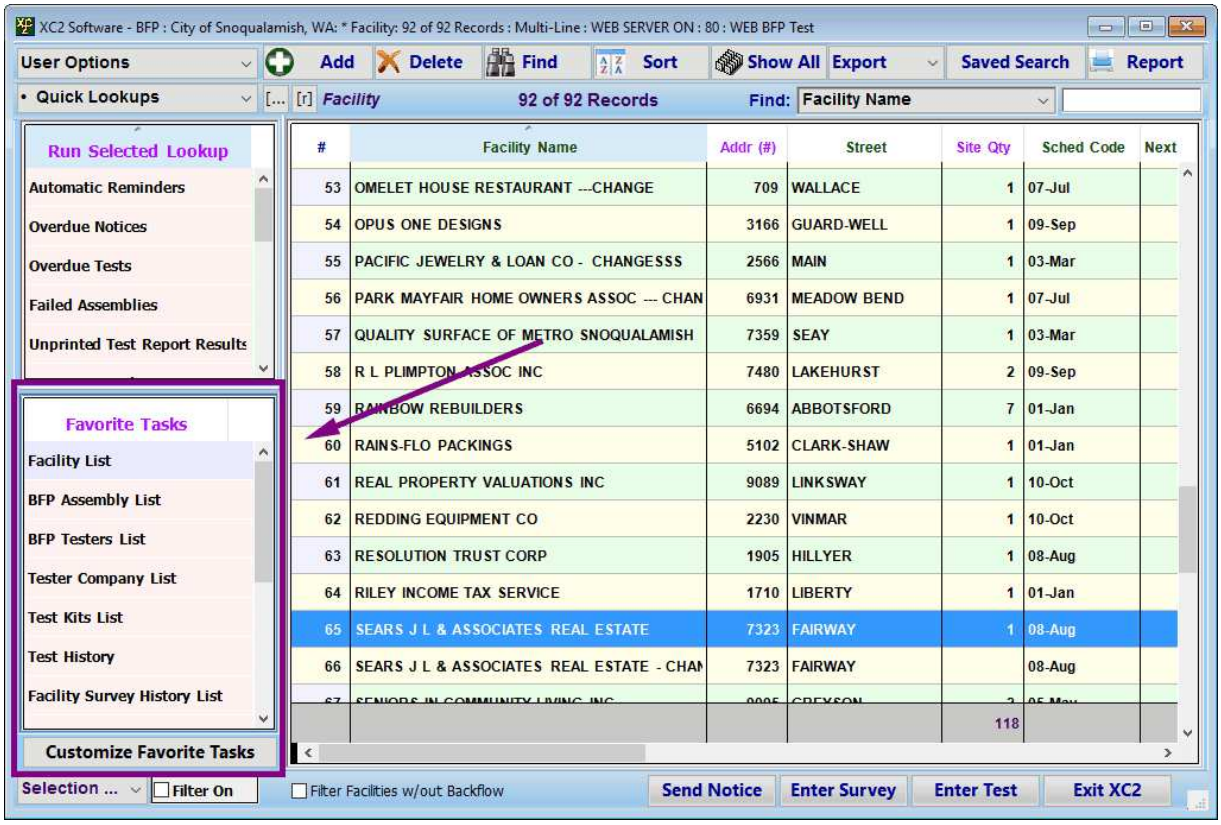
Favorite Tasks will be your main navigation hub.

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



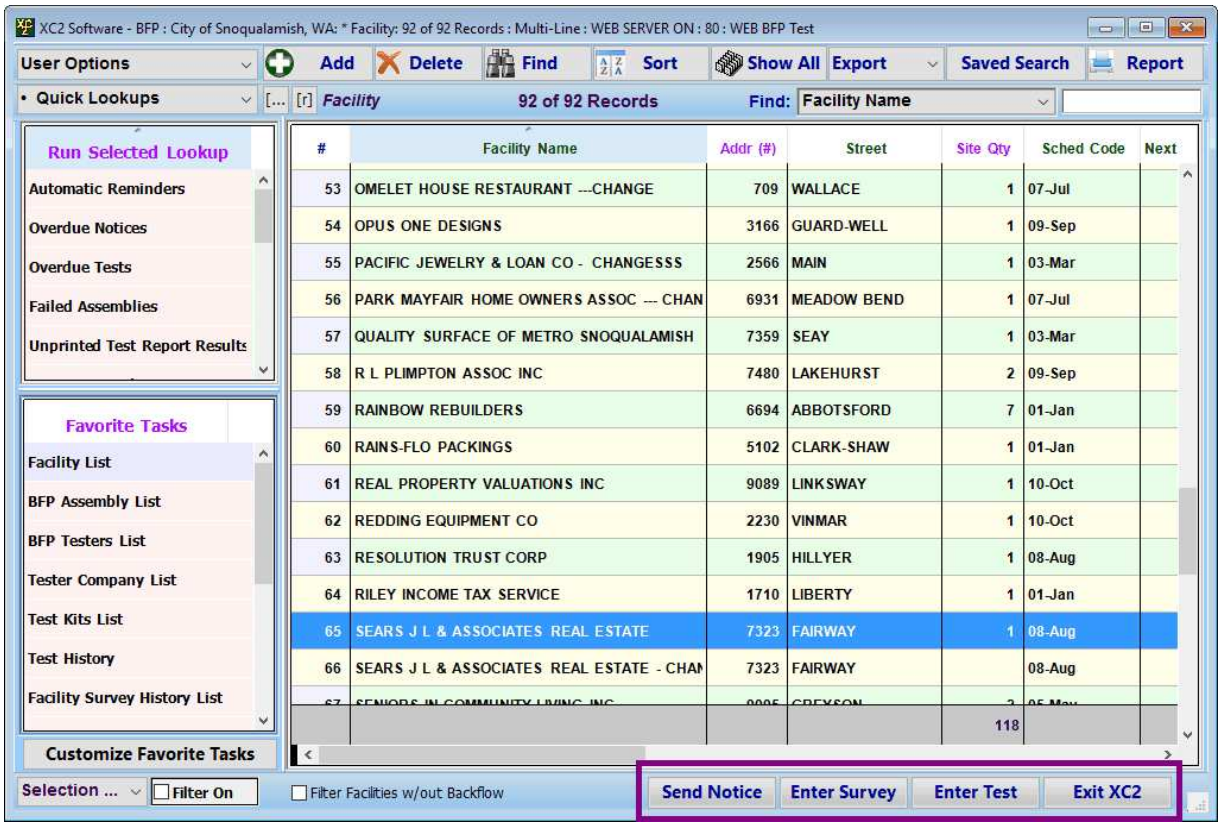
Notes:

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.

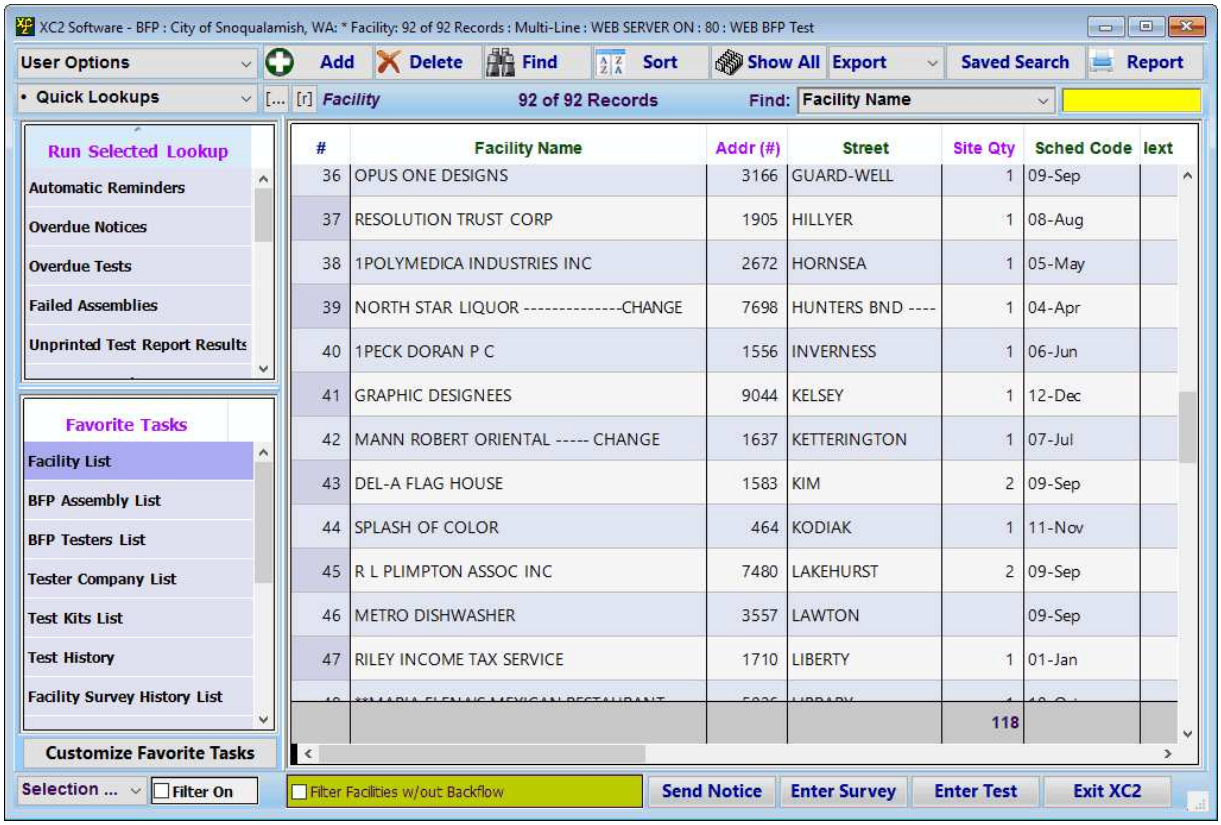
Here is a Senario

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

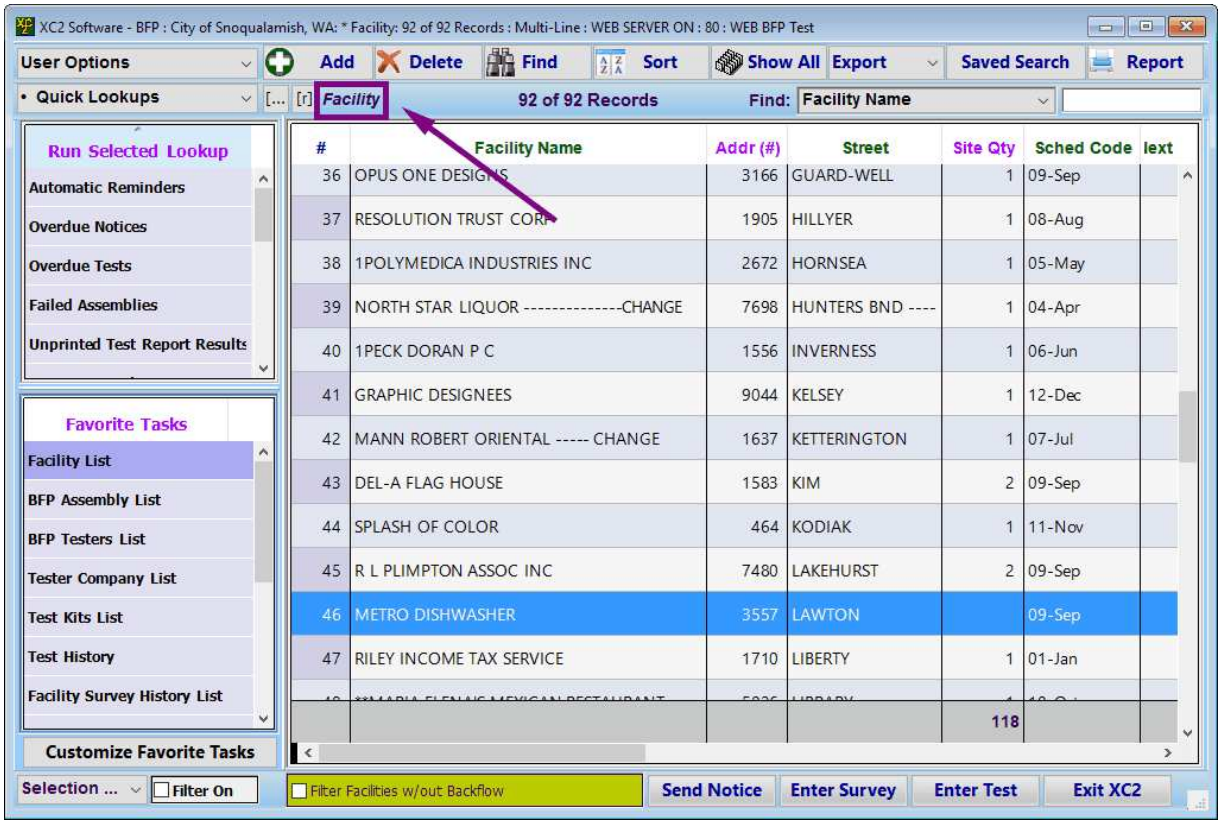


Notes:

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

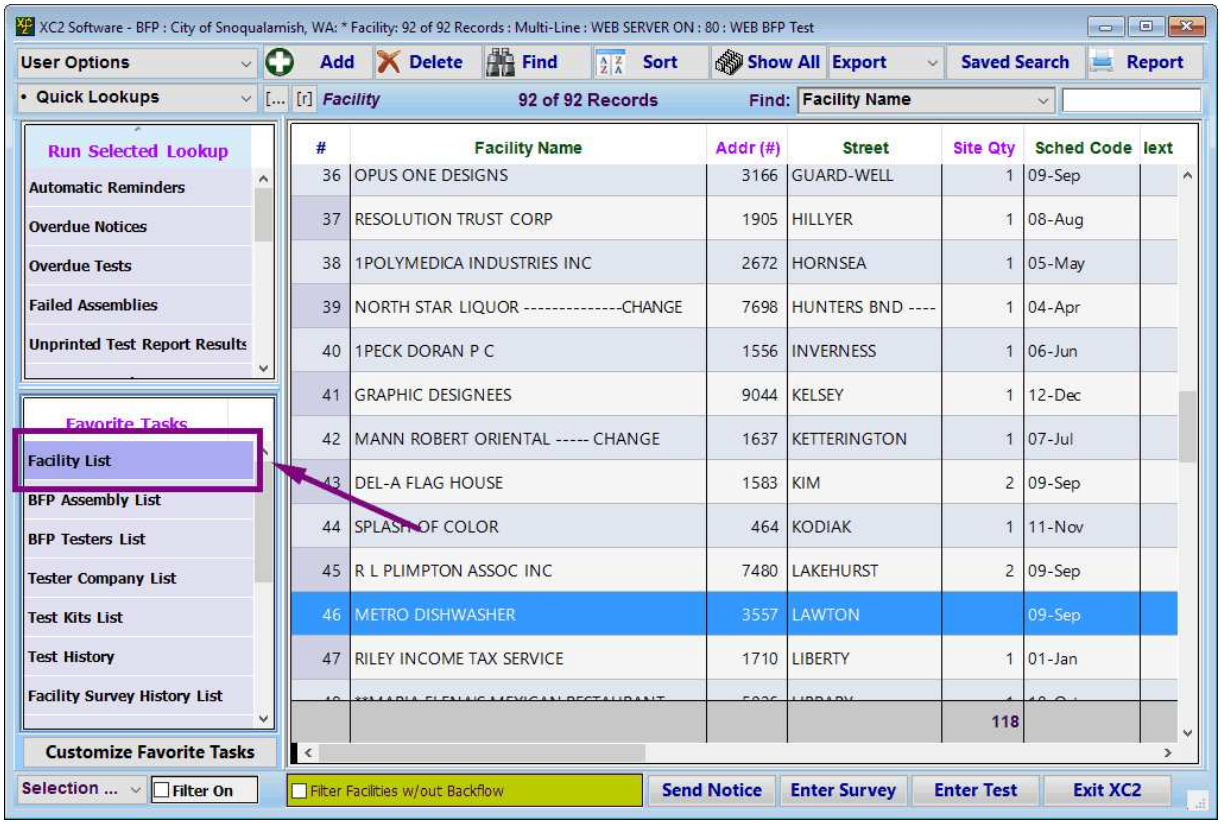


Notes:

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:

XC2 Software Knowledge Base

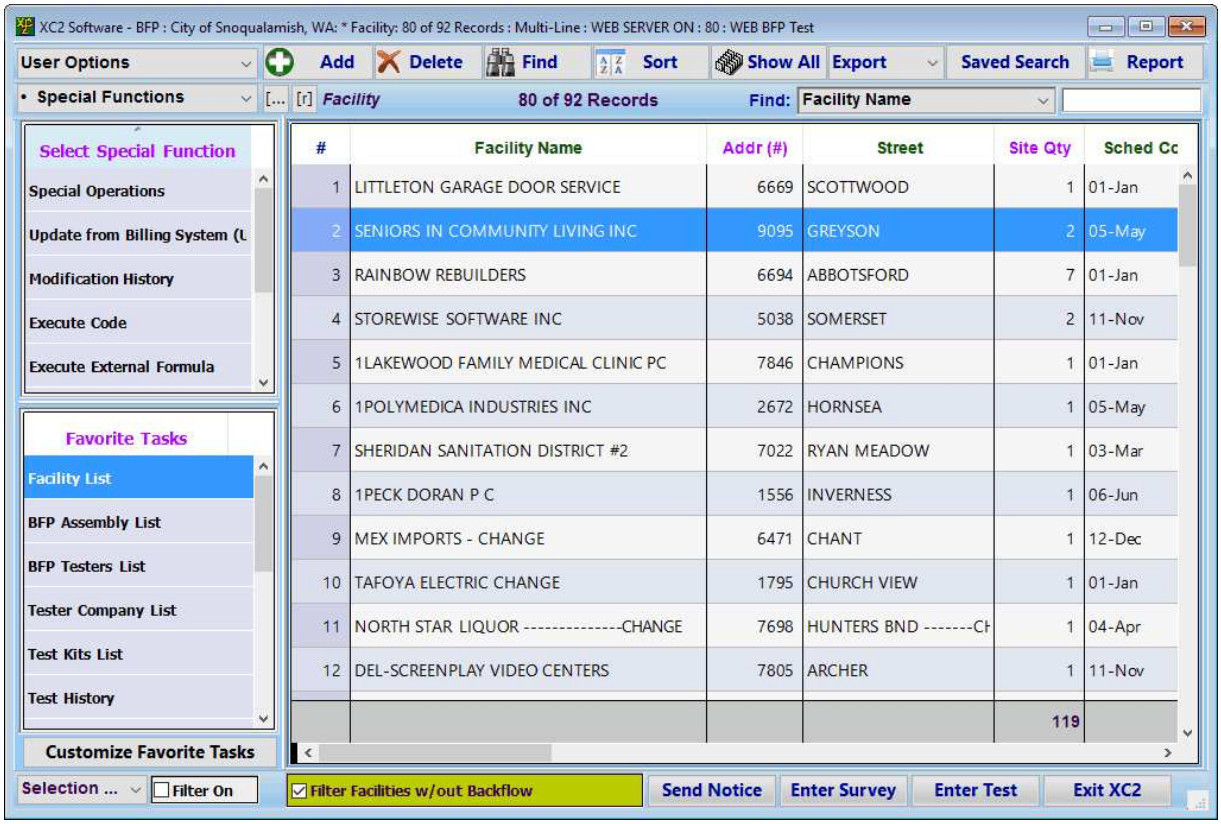
How to Set the New Main Screen as the Default Screen and Automatically Appear on Startup

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



Notes:

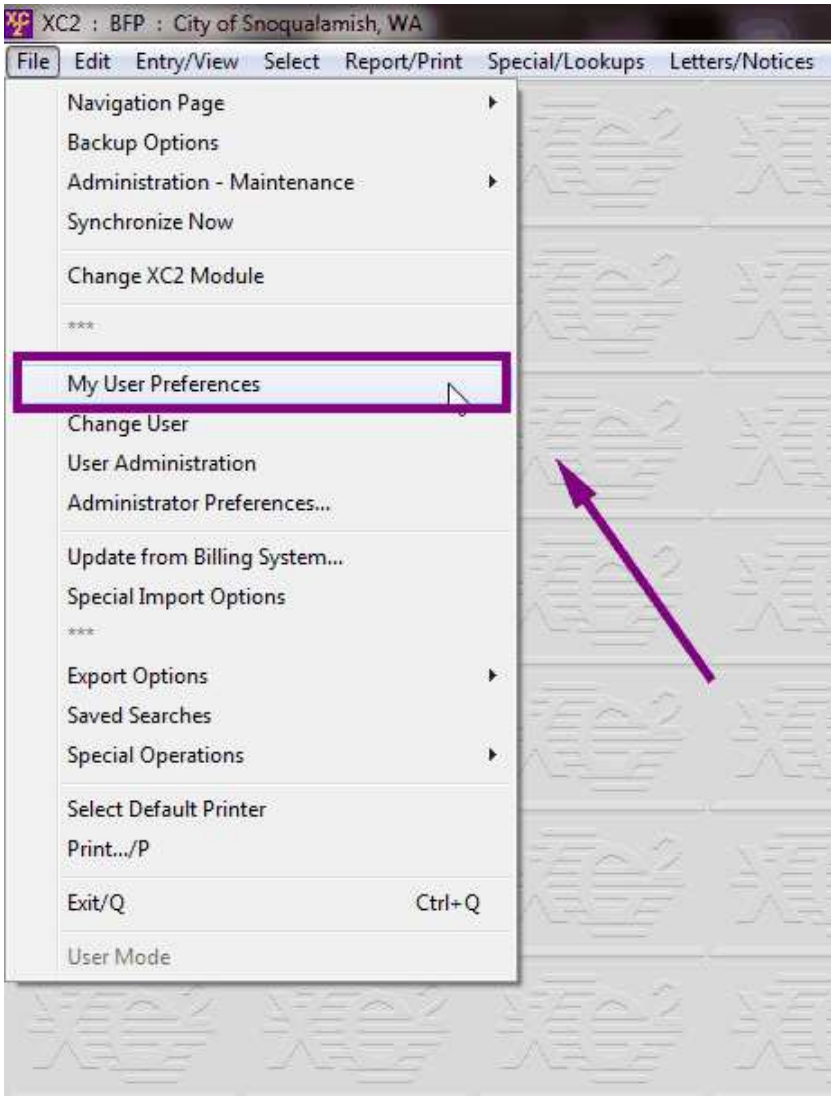
My User Preferences

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

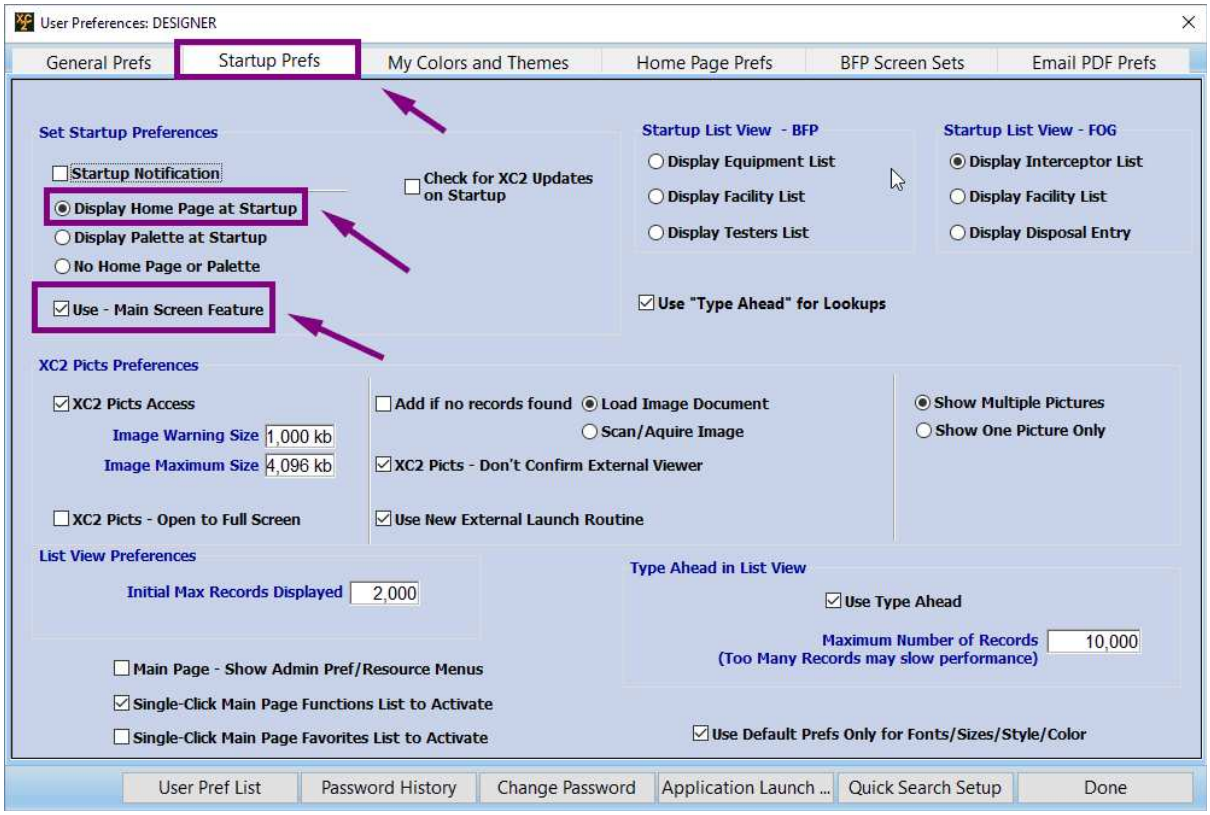
For Main Screen to Appear upon Startup

Click

Startup Prefs Tab

Check **Use** - **Main Screen Feature**

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



Notes:

XC2 Software Knowledge Base

Resizing and Moving the Main Screen

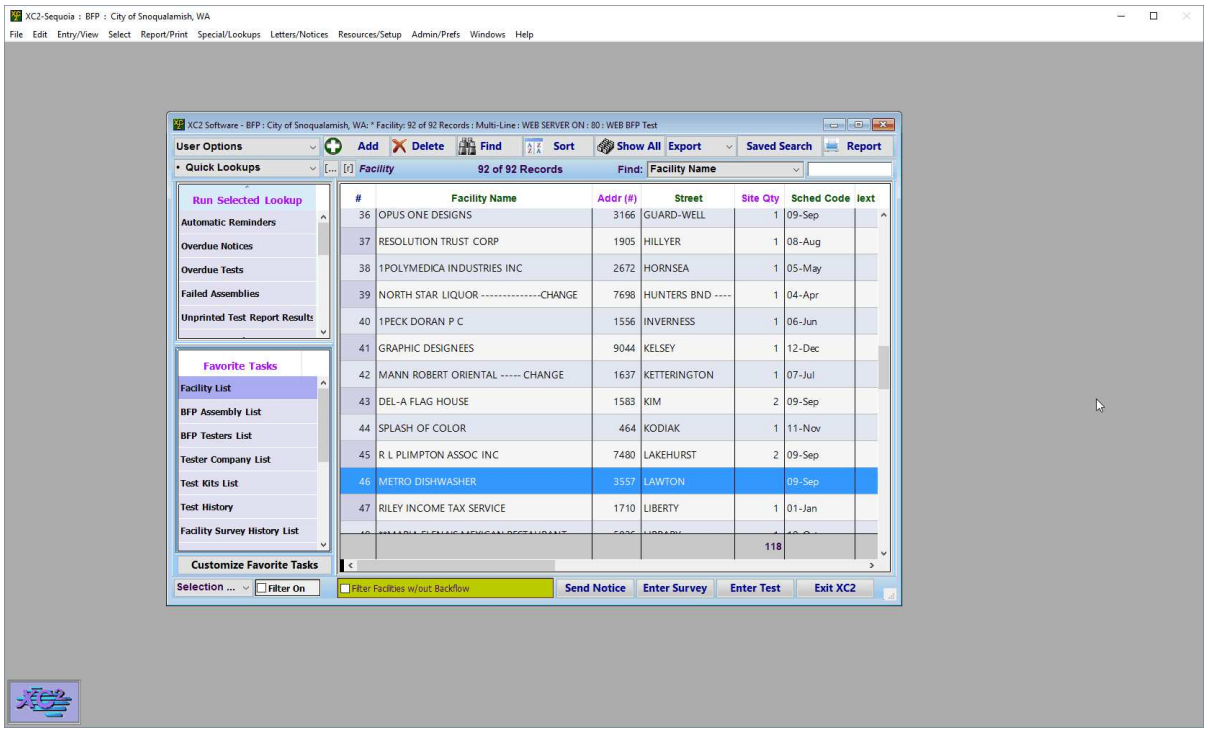
KB Asset ID: 3507

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 main screen fits within XC2's Main Window

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

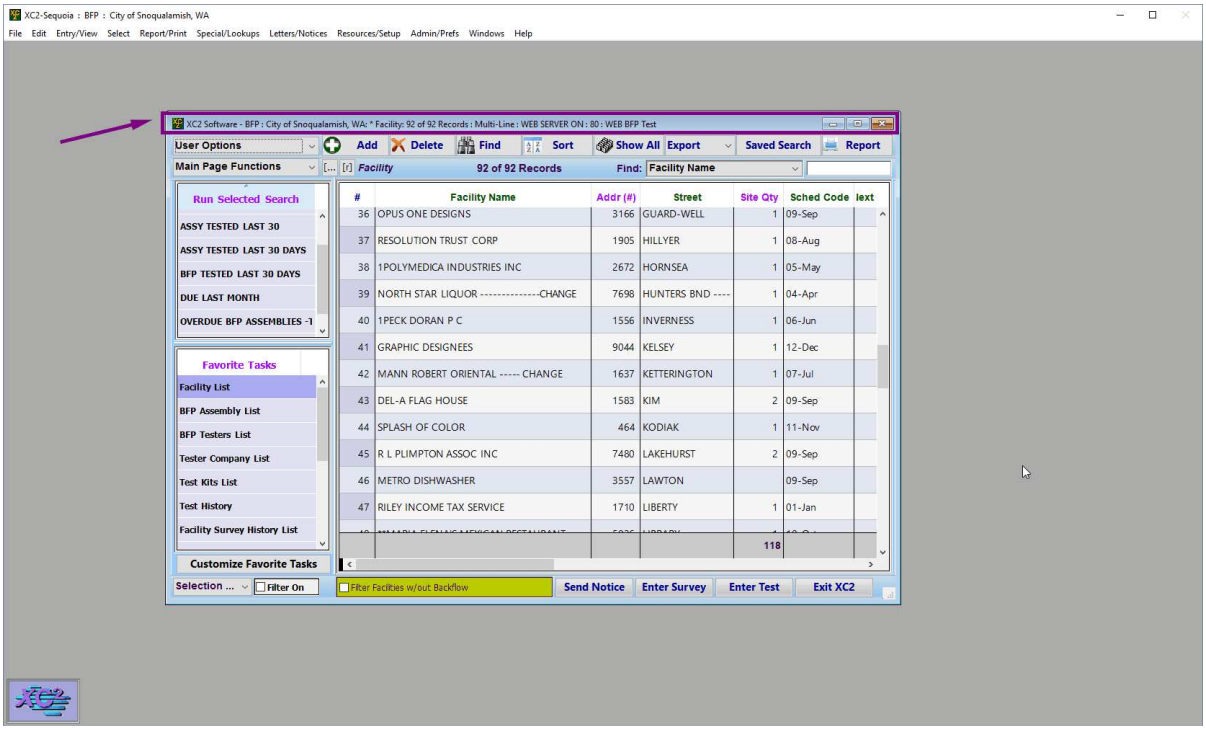


Notes:

Moving XC2 - Title Bar

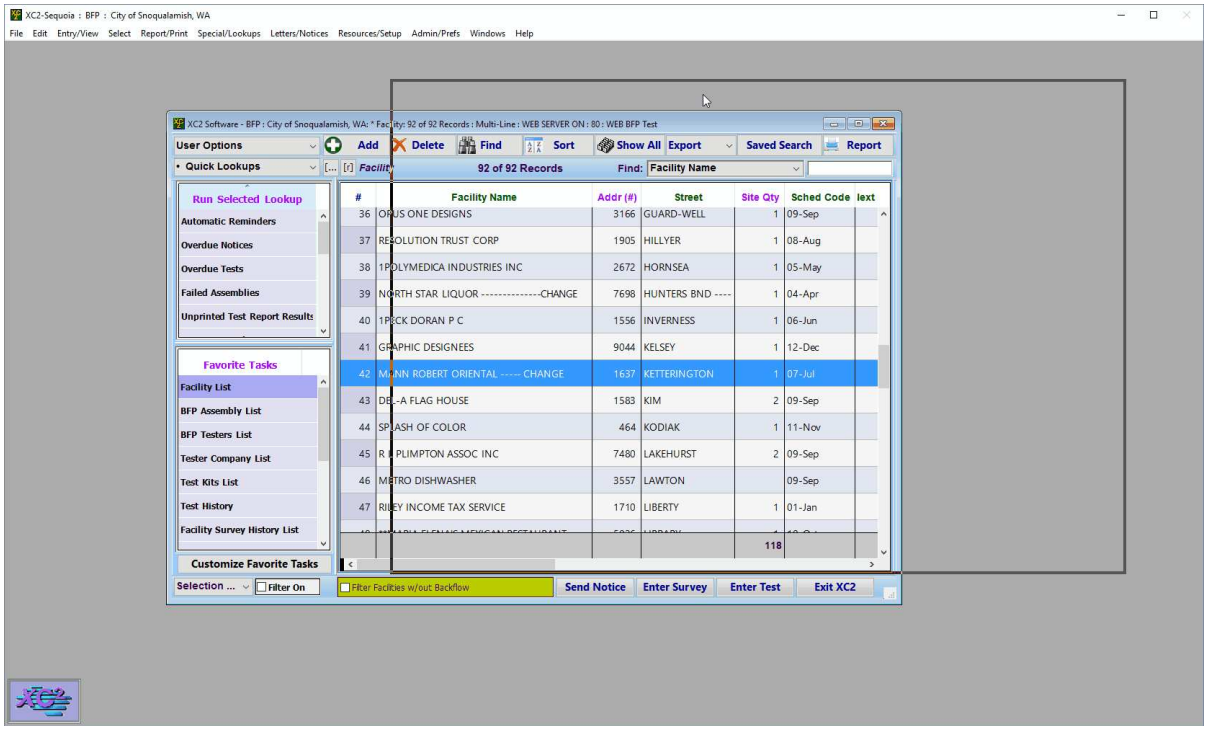
You can move the Main Screen around by clicking on the Title Bar and Sliding the Main Screen to a different location

Click in the Title Bar and drag to your desired location



Notes:

Move Screen

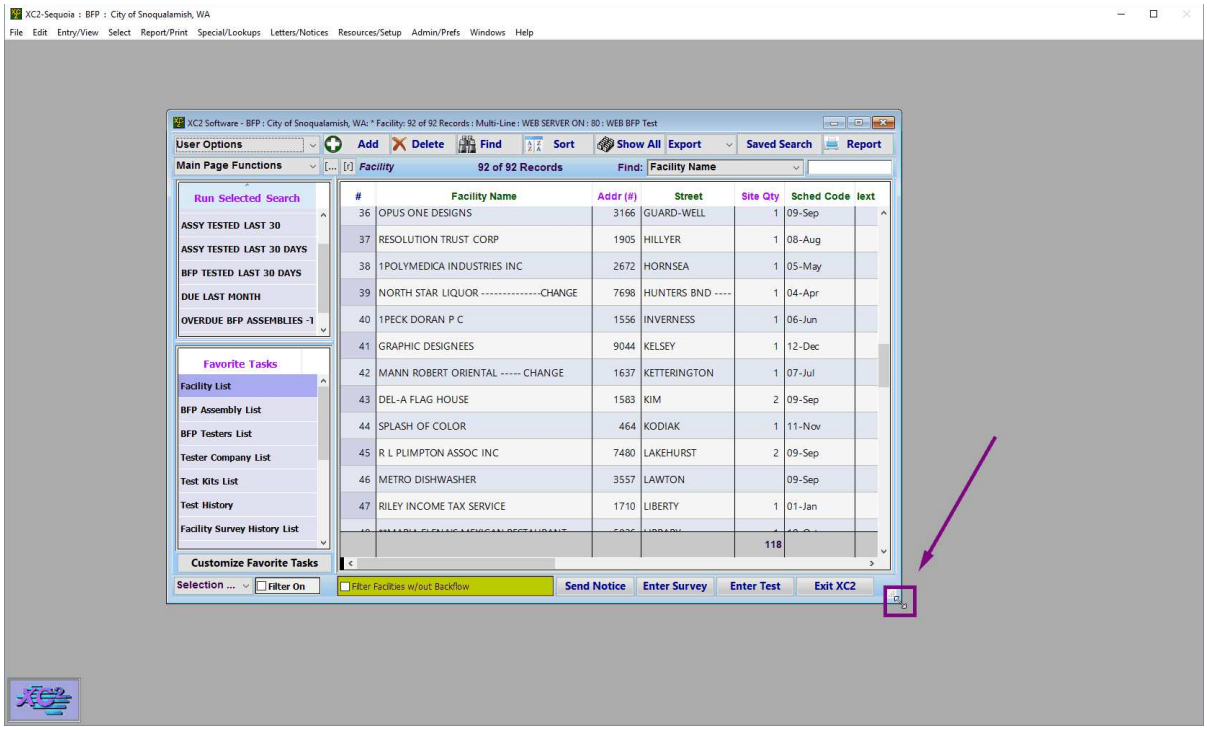


Notes:

Resize Manually

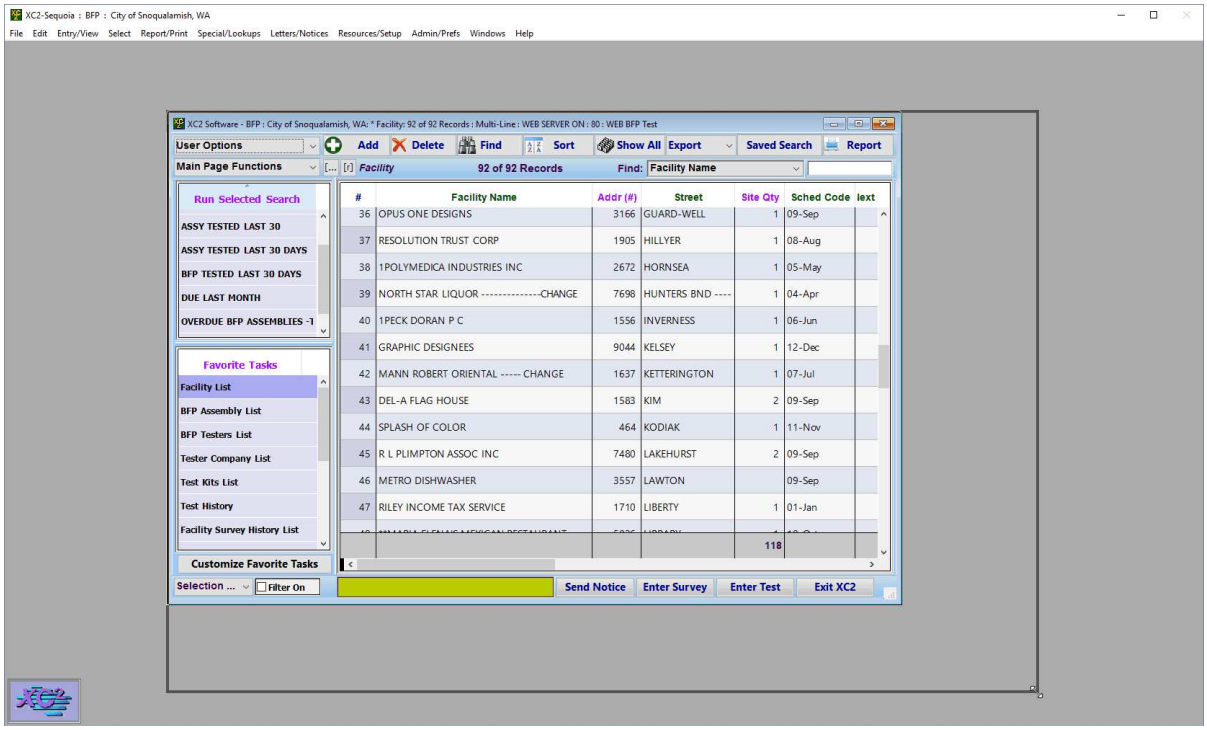
The Main Screen can be Resized and made larger or smaller

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



Notes:

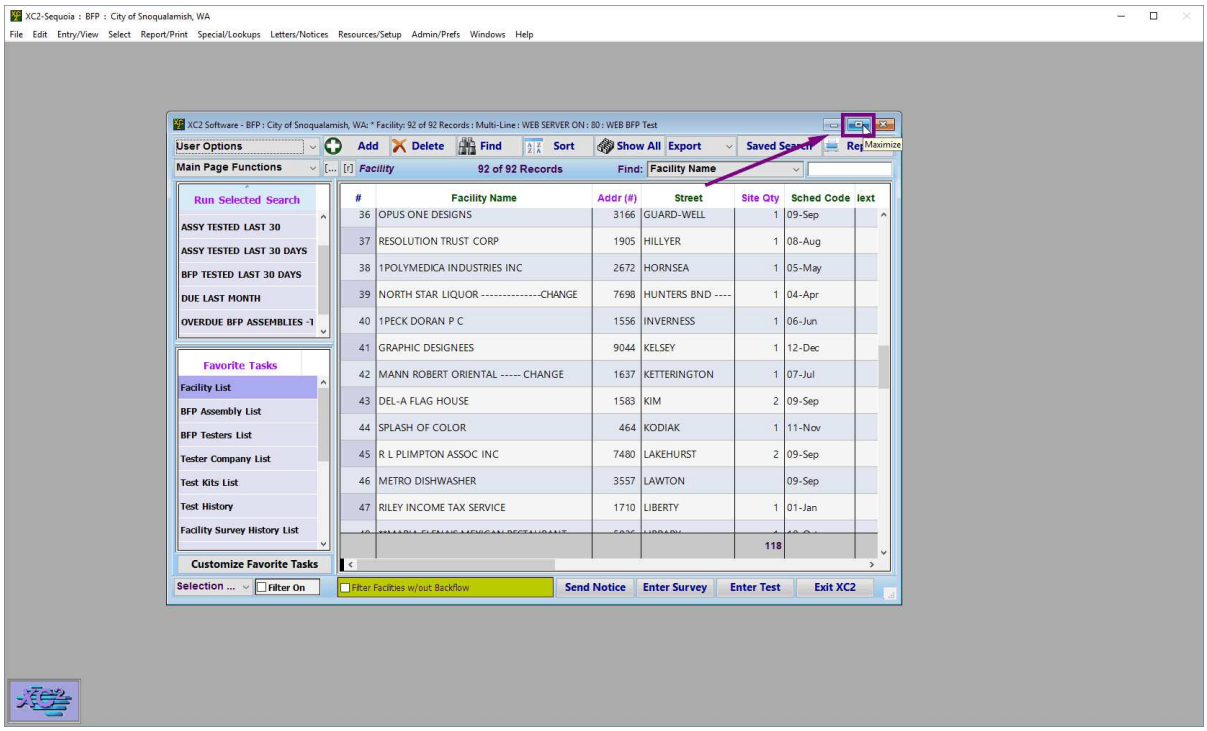
Resize



Notes:

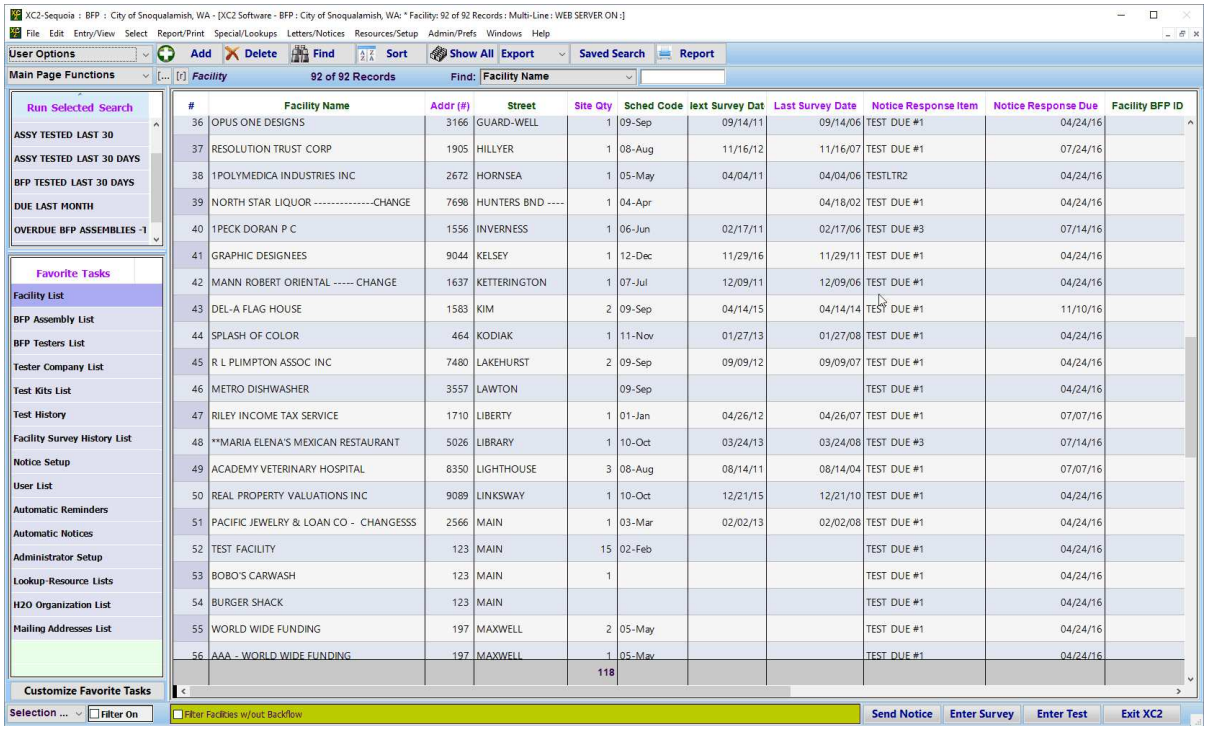
Maximize

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



Notes:

Maximized



#	Facility Name	Addr (#)	Street	Site Qty	Sched Code	lext 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	KETTERINGTON	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						

Notes:

XC2 Software Knowledge Base

Automatically Adjust Column Widths and Auto Maximize

KB Asset ID: 2892

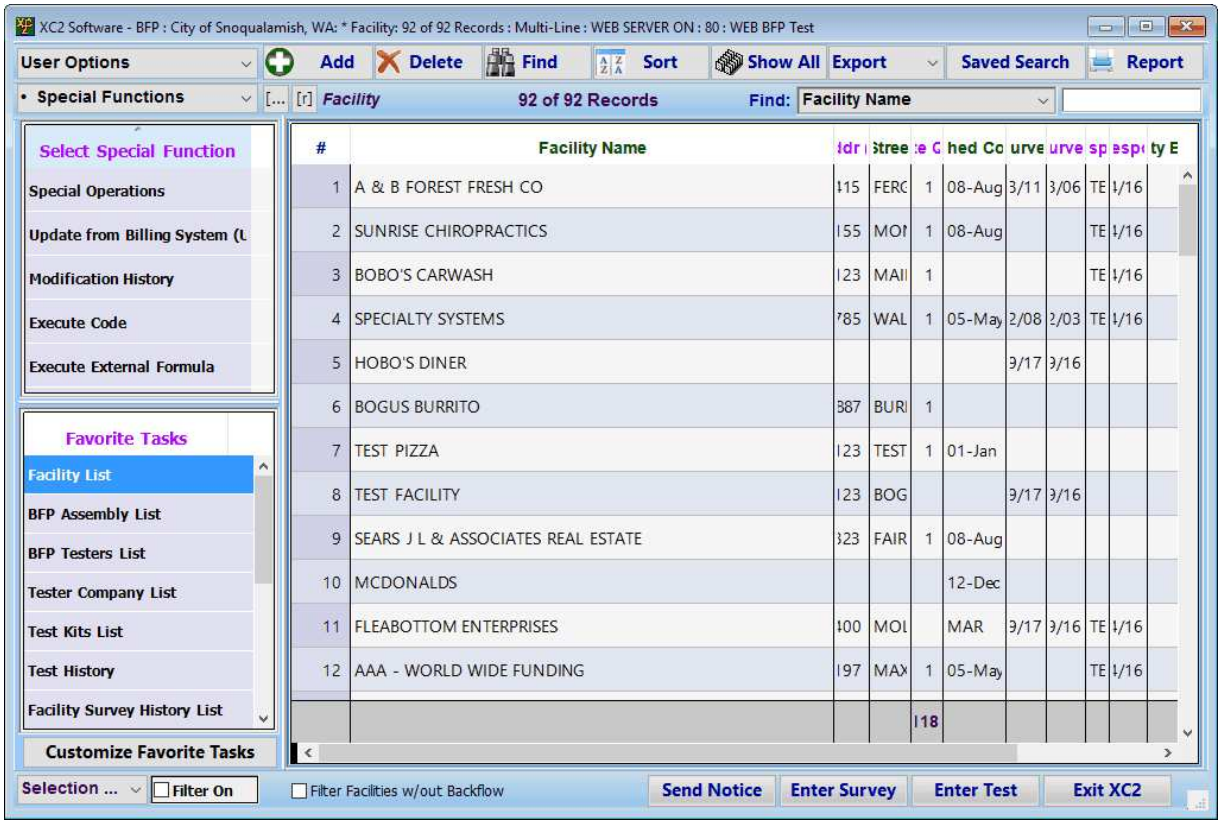
This page describes how to have XC2 automatically adjust column widths on List Views and how to use the auto Maximize Feature.

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.

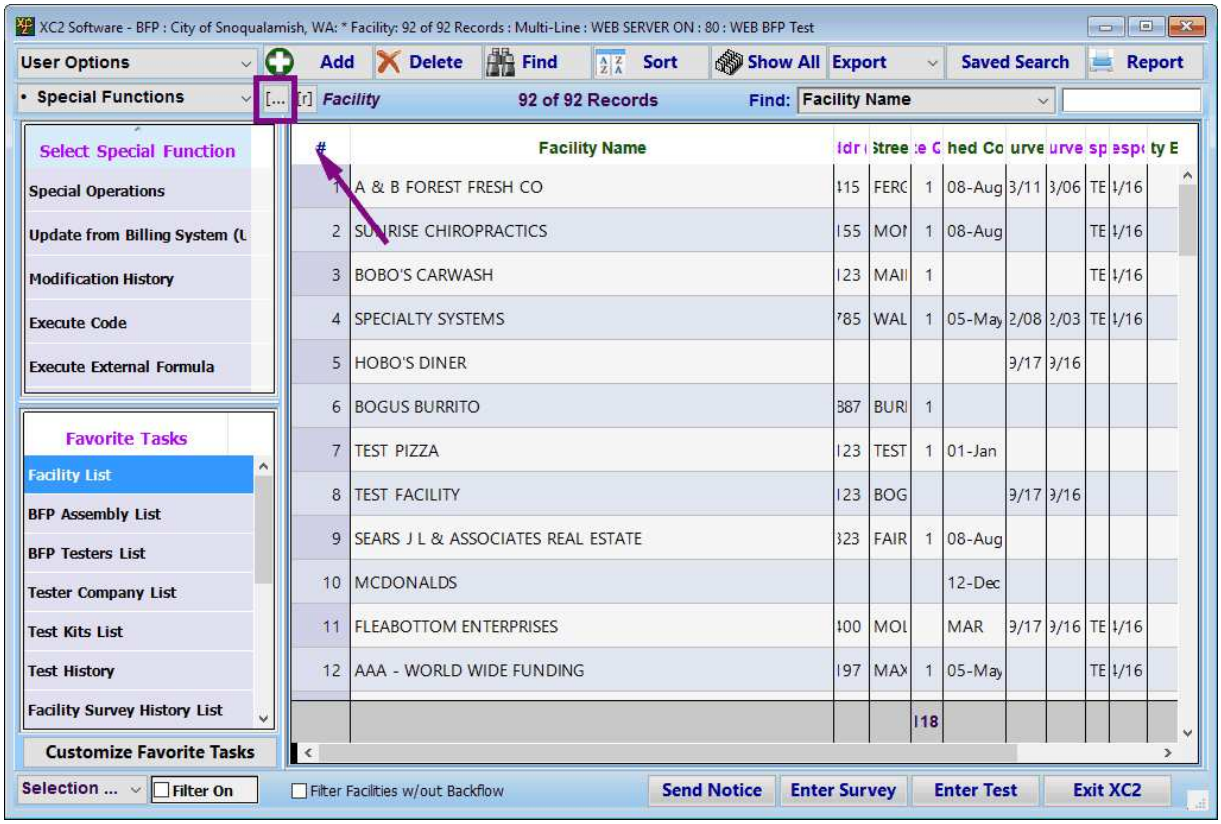


Notes:

Adjusting Column Widths

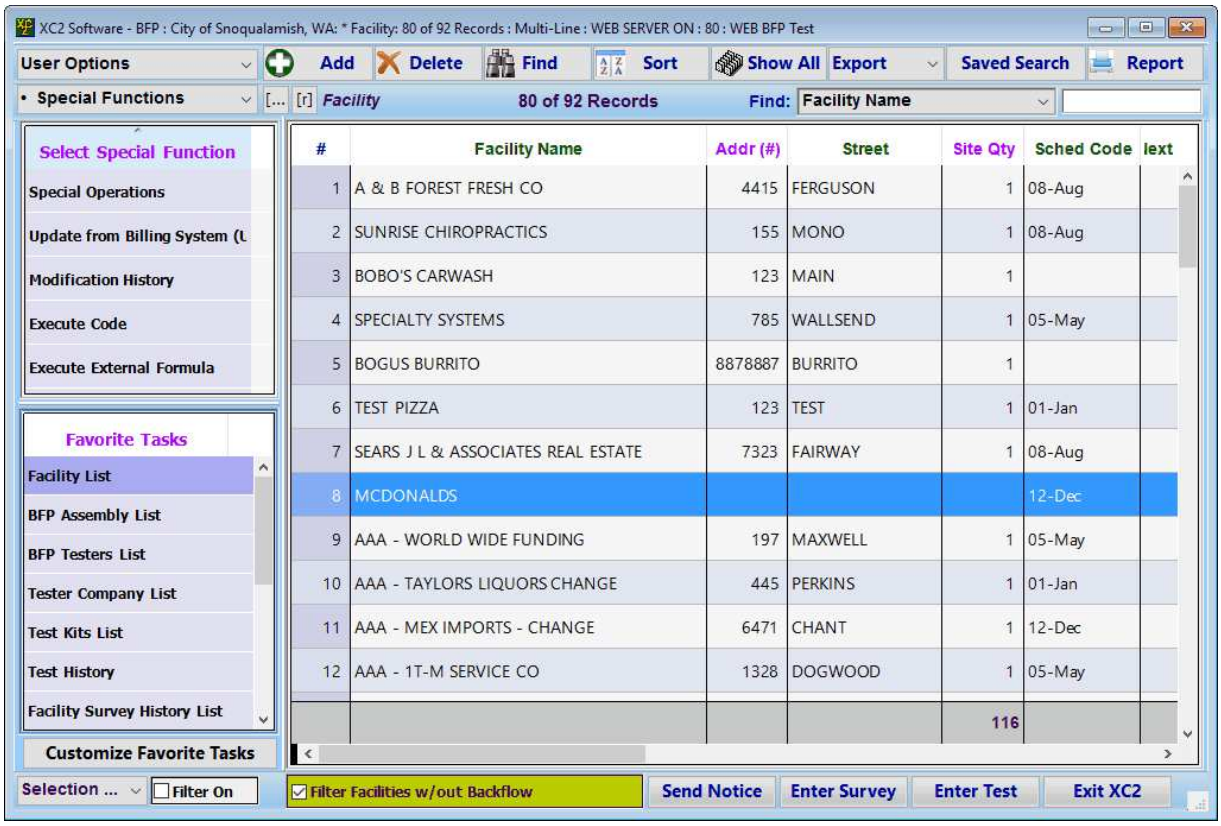
In the top left corner of the Main Page, there is a box with 3 dots.

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



Notes:

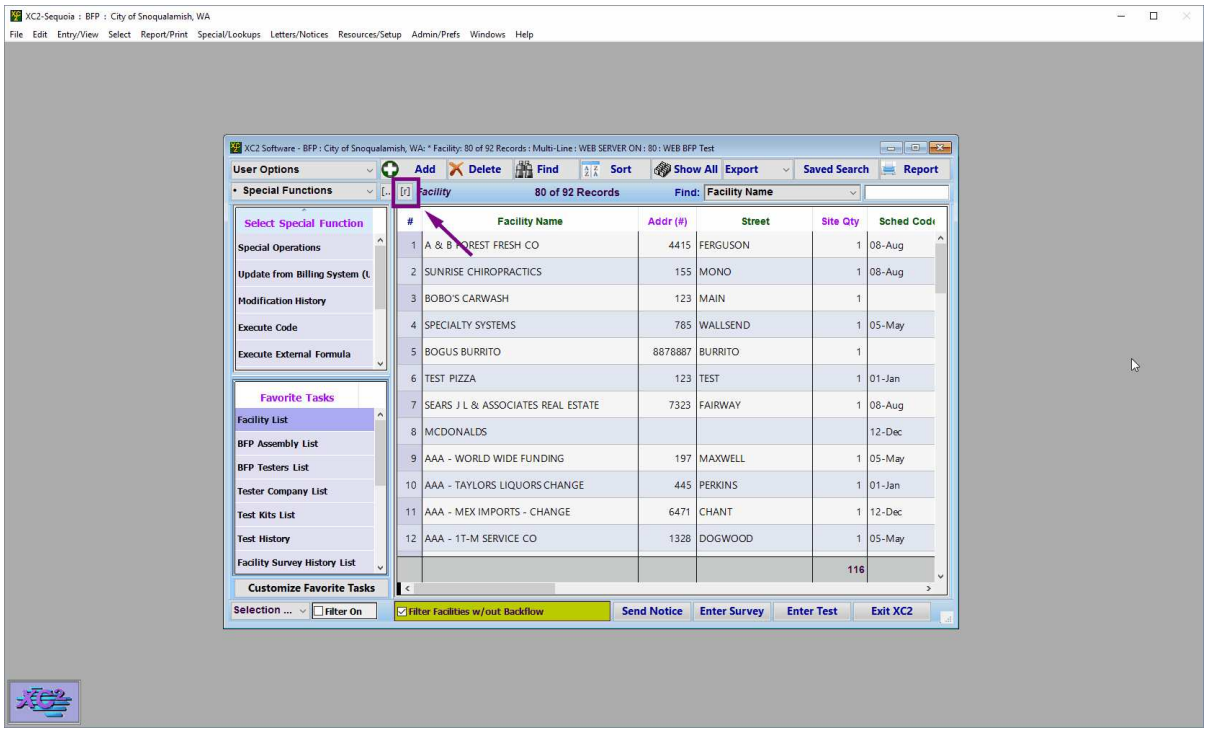
Widths will be automatically adjusted



Notes:

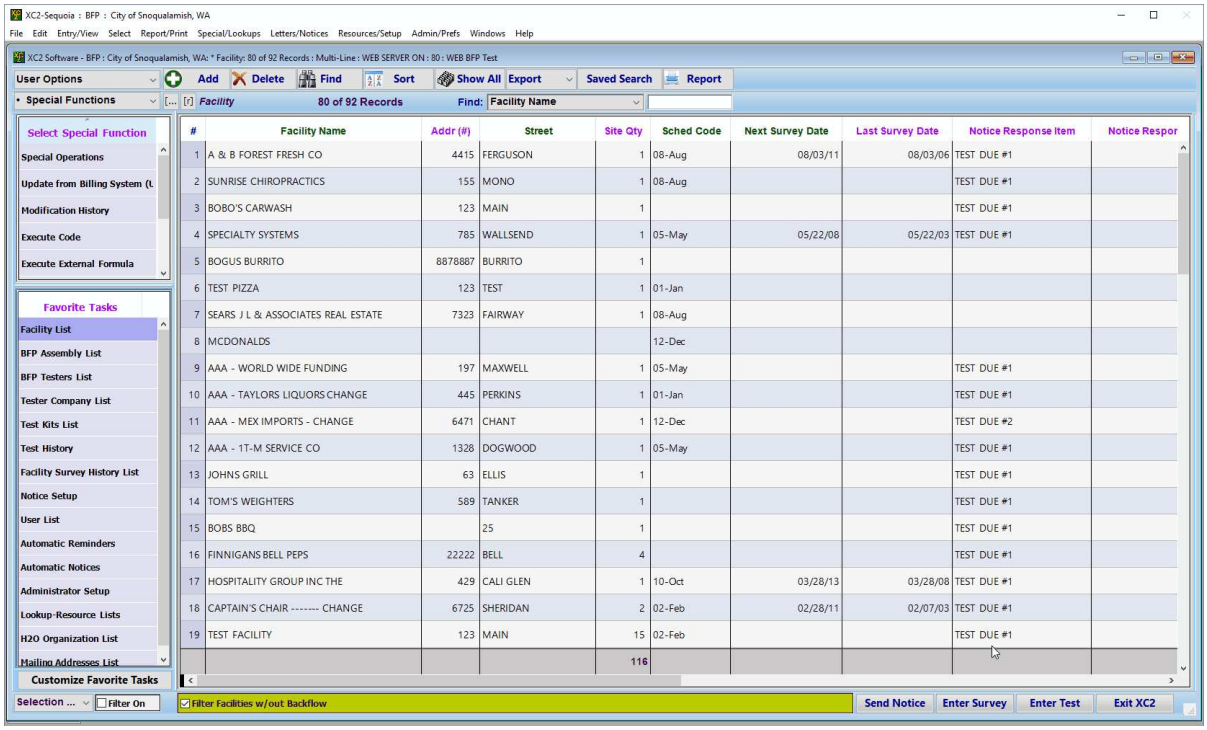
Auto Maximize

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



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.

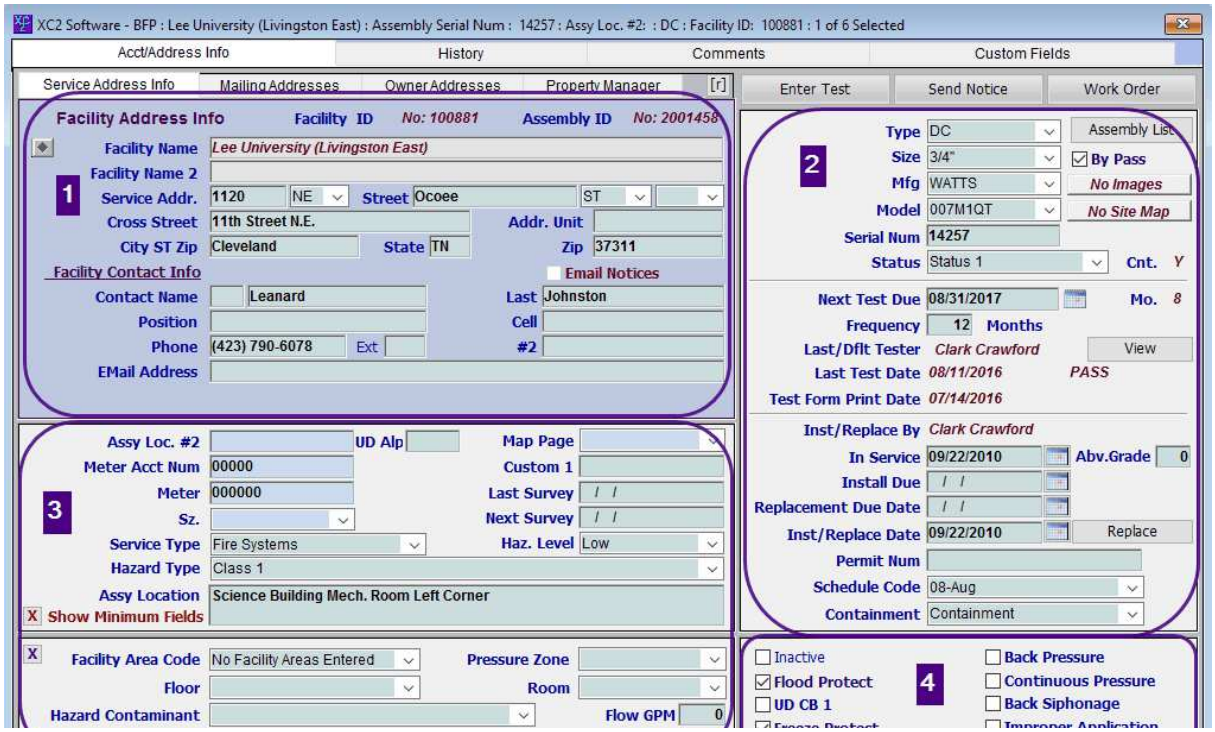
Areas Indicated

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



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.

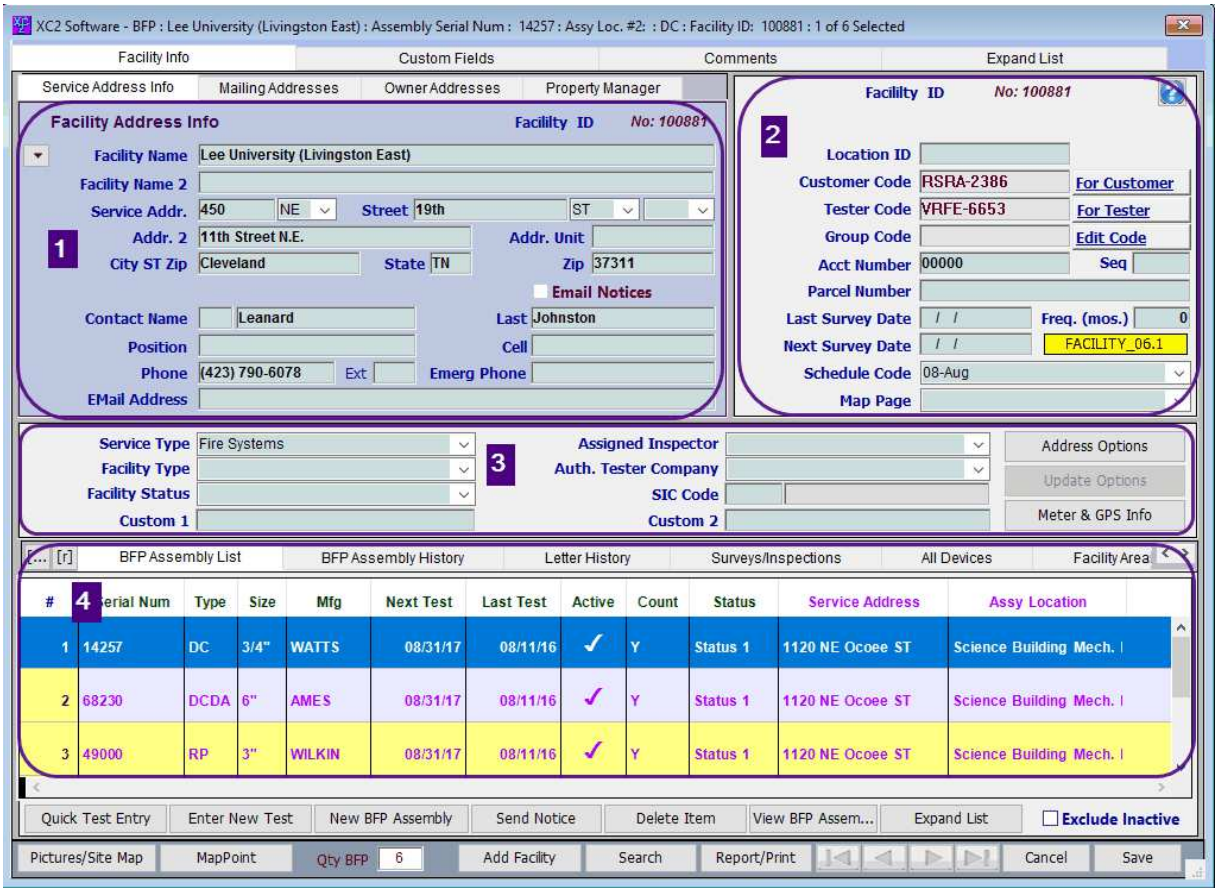
Areas Indicated

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

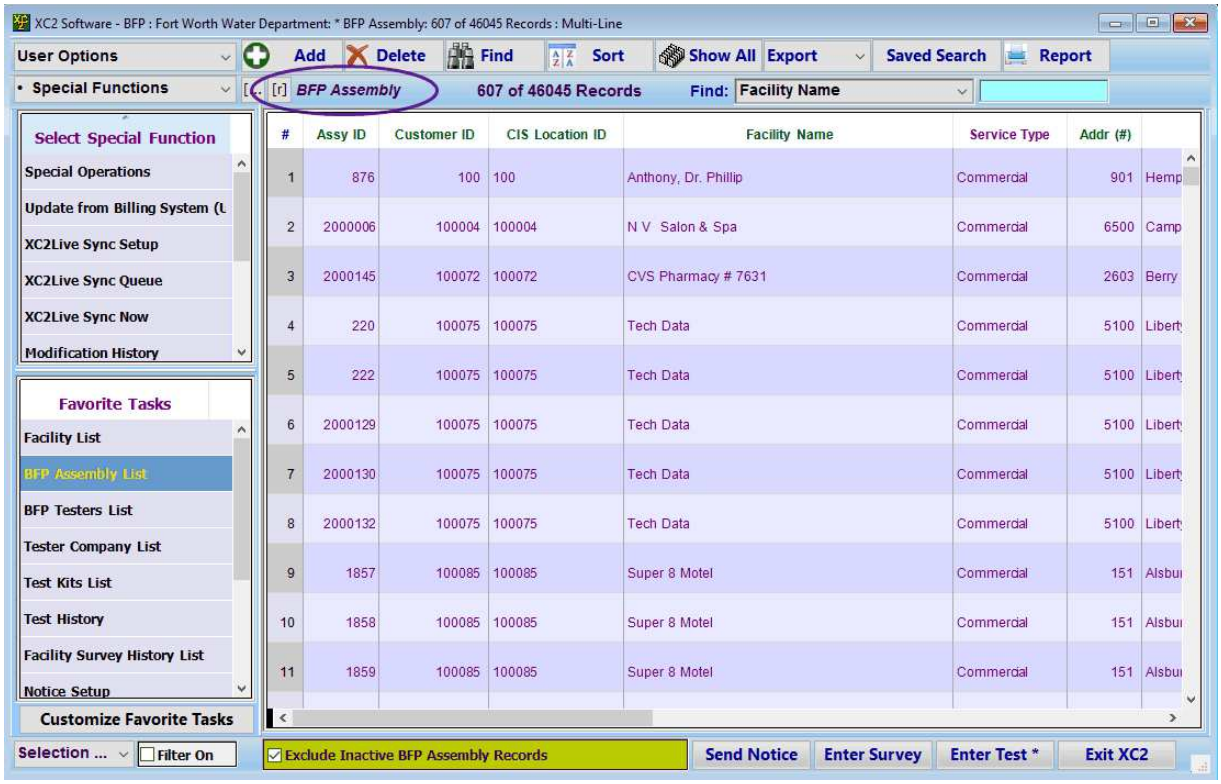
4. Associated Backflow List



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

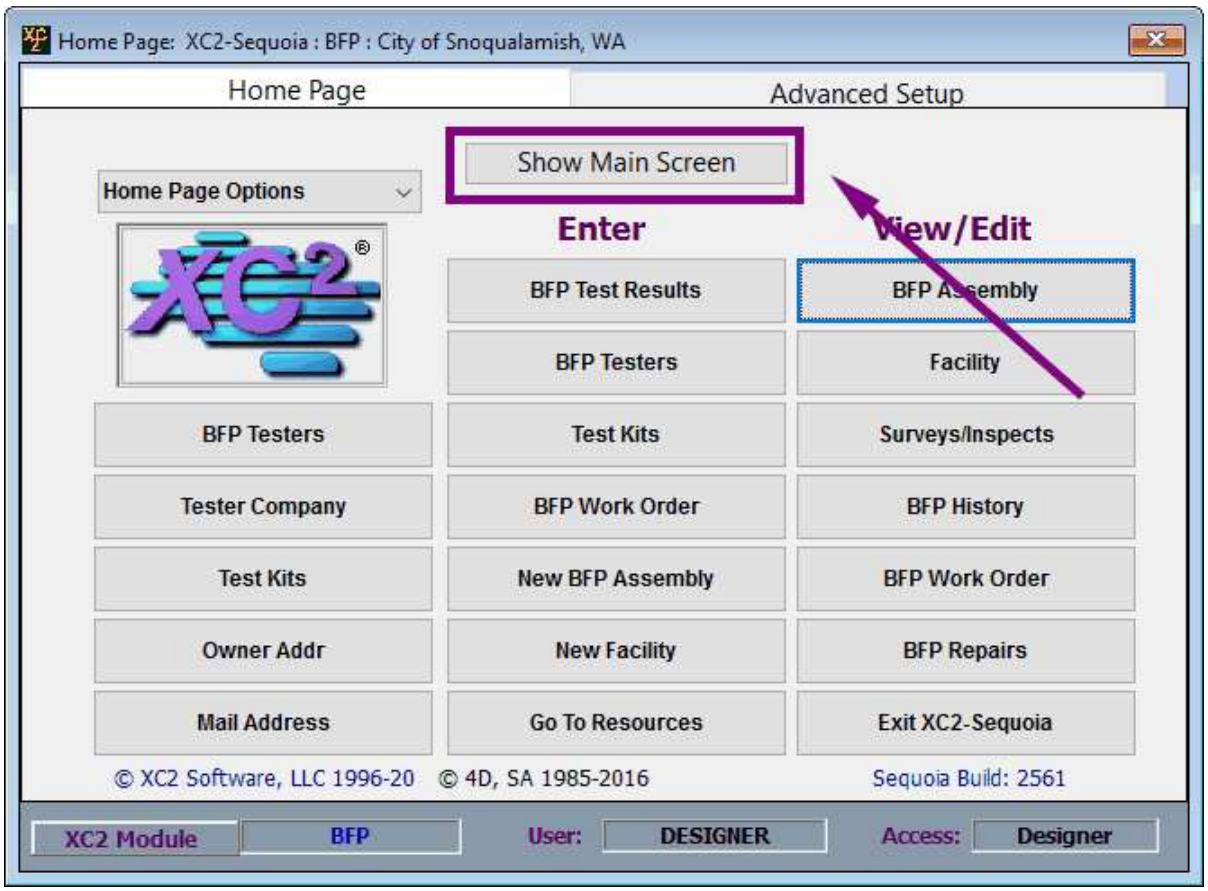
How to Access the Main Screen

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

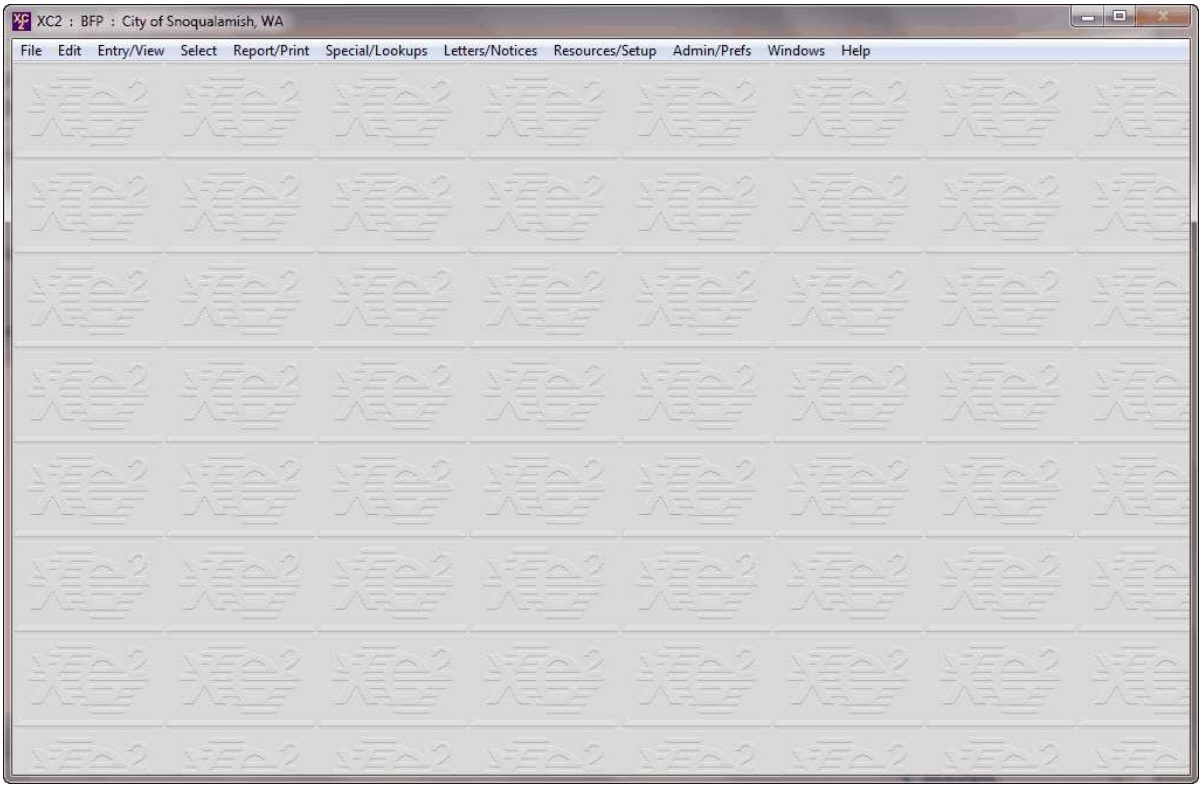


Notes:

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:

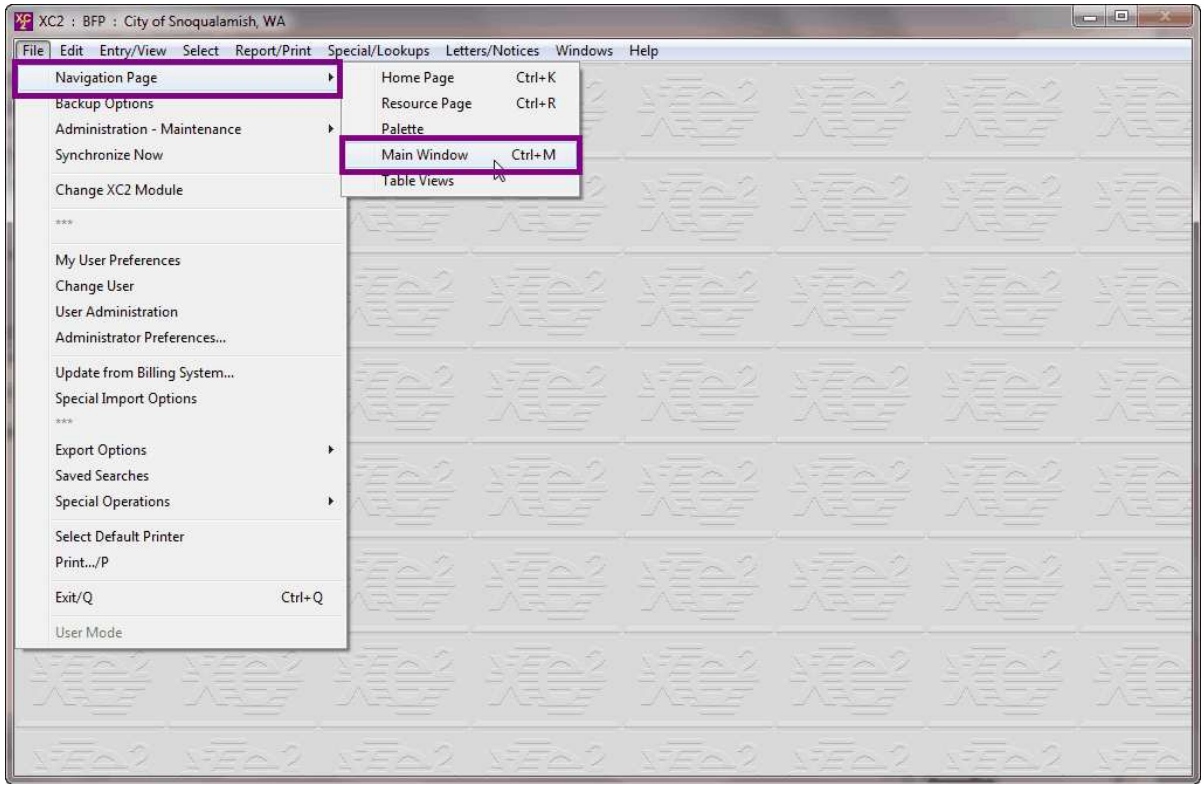
From File Menu

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:

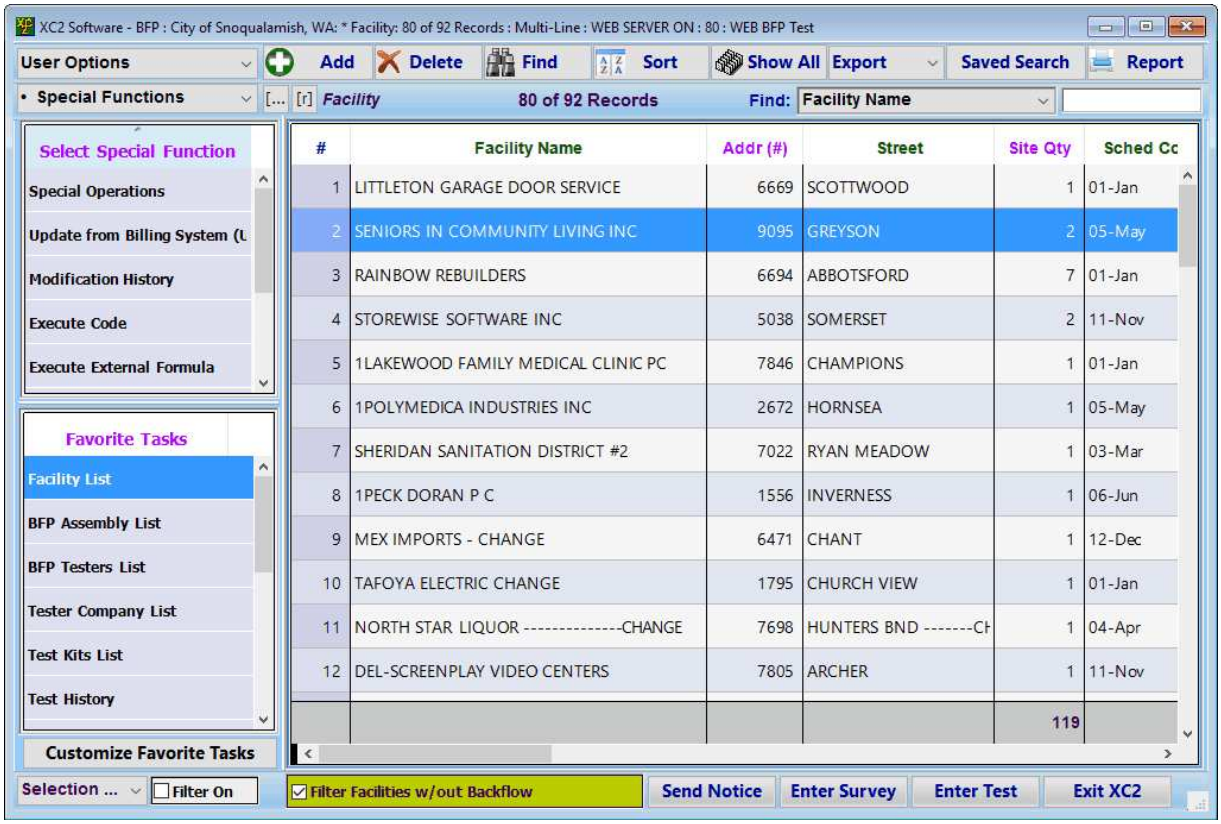
Main Screen

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



Notes:

XC2 Software Knowledge Base

Sorting A List And Creating Subset of Records

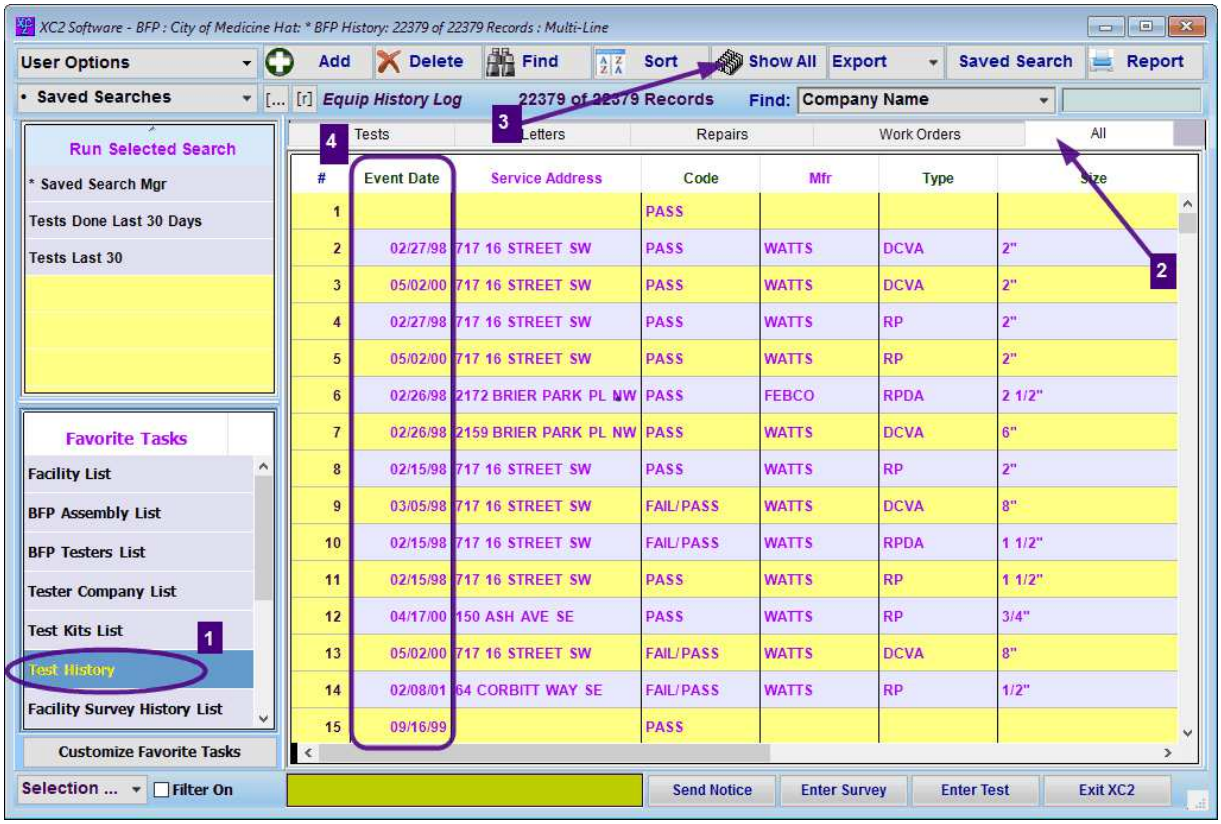
KB Asset ID: 3353

There will be times when you will not want to use the search features but instead gather a list, sort that list, highlight spacific 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



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 highlihted withour 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

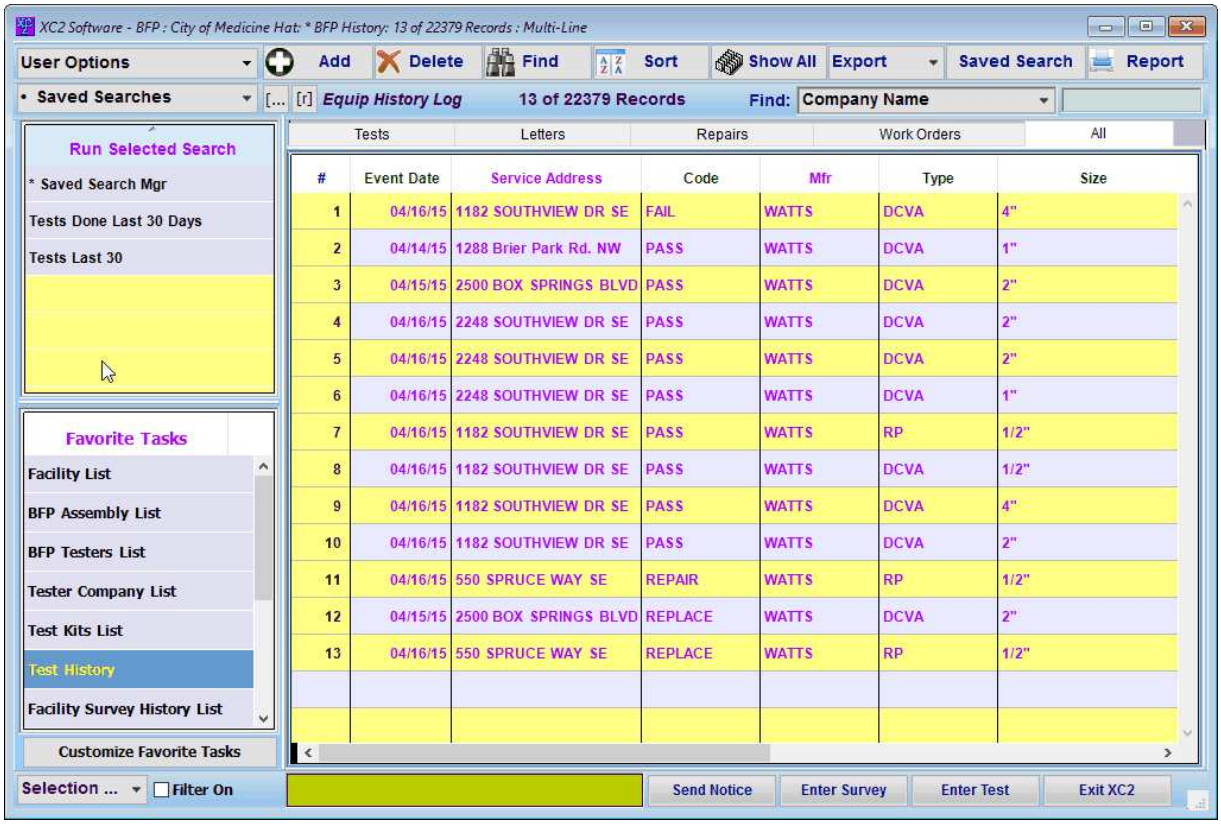
Pres Control + H key

Notes:

Subset Of Records

Your list will now only contain the records highlighted.

Here you can run a report or export the list.



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

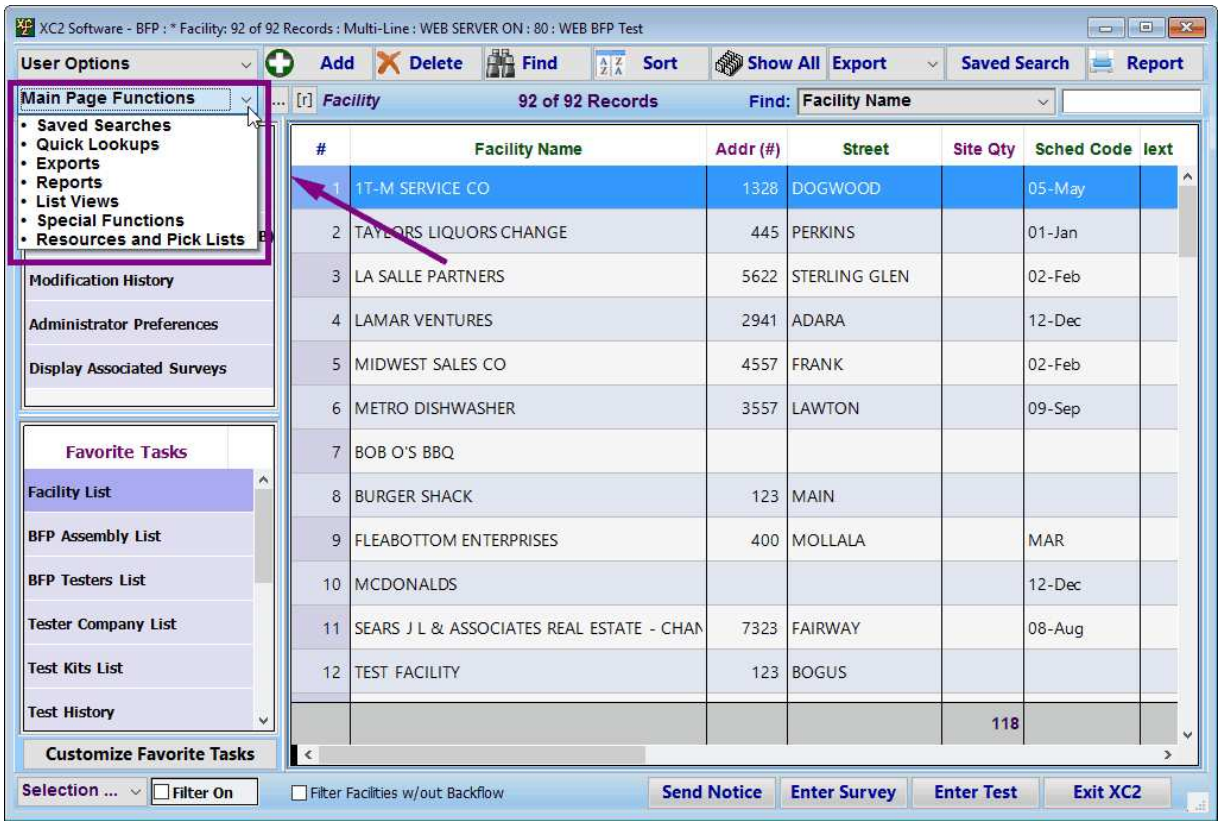
KB Asset ID: 3502

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.



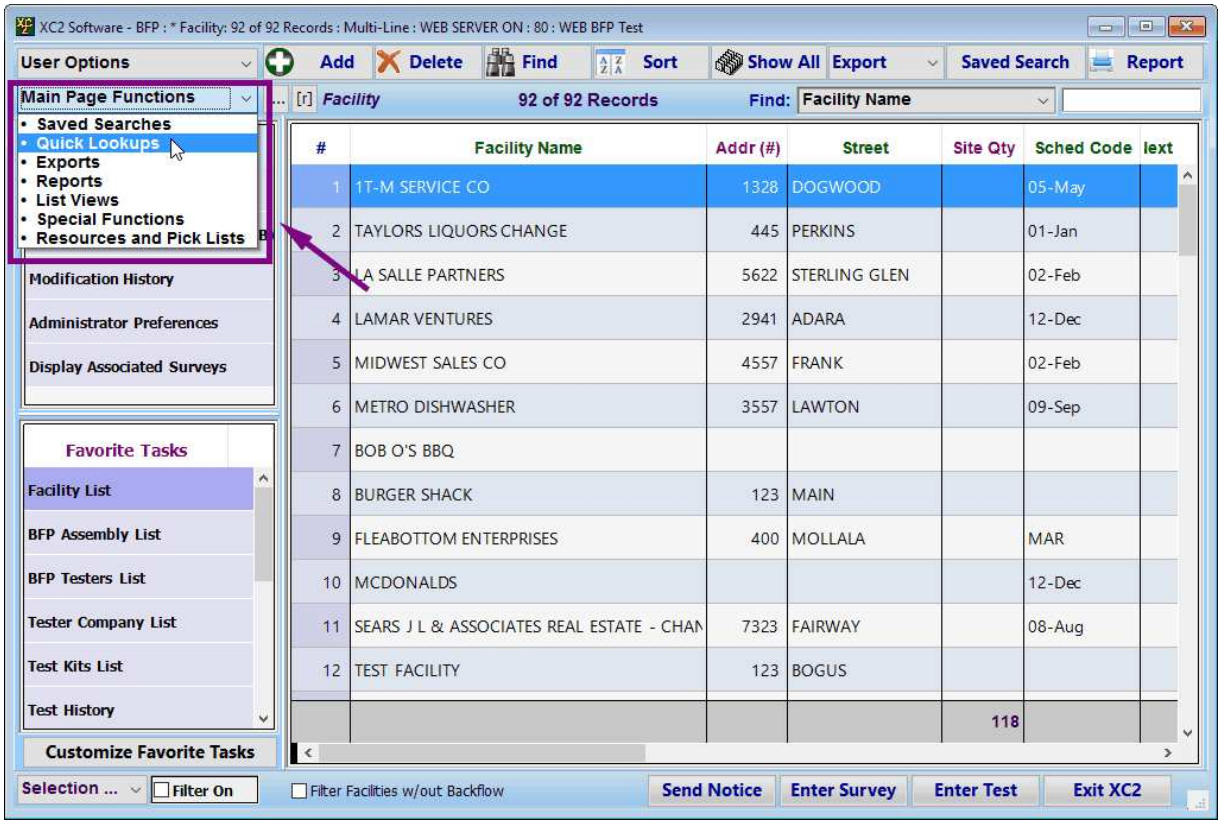
Notes:

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



Notes:

XC2 Software Knowledge Base

Enhanced Saved Searches

KB Asset ID: 45

Create and/or initiate from Main Menu

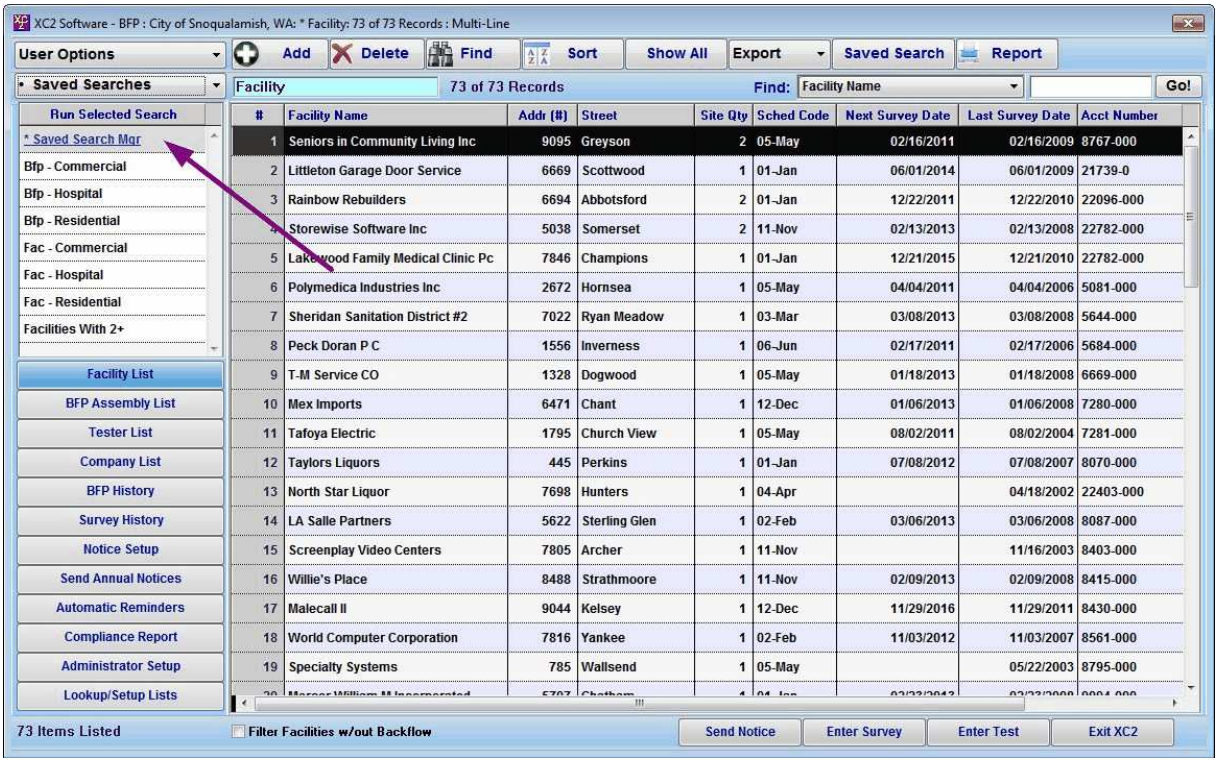
Overview

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

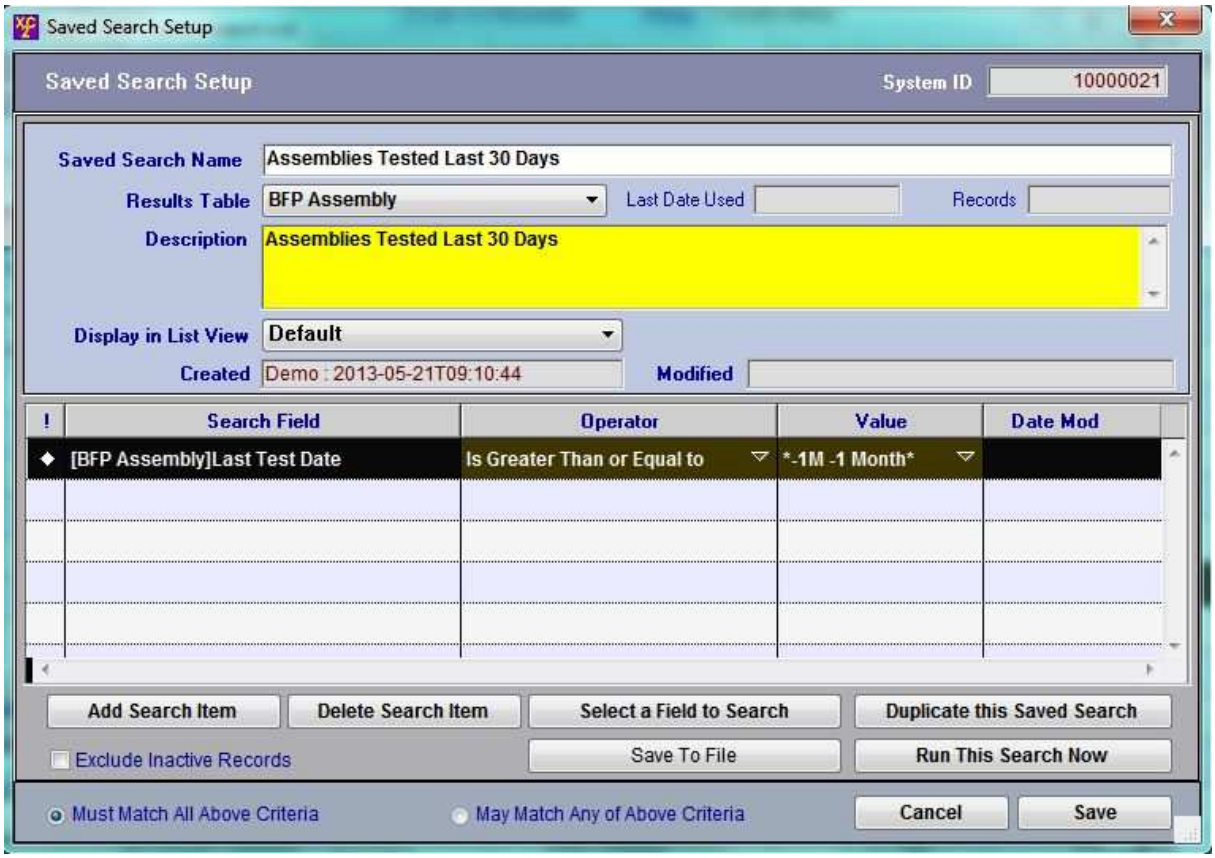


Notes:

Design Your Search

2. Design Your Search Parameters

Saved Search Setup Page

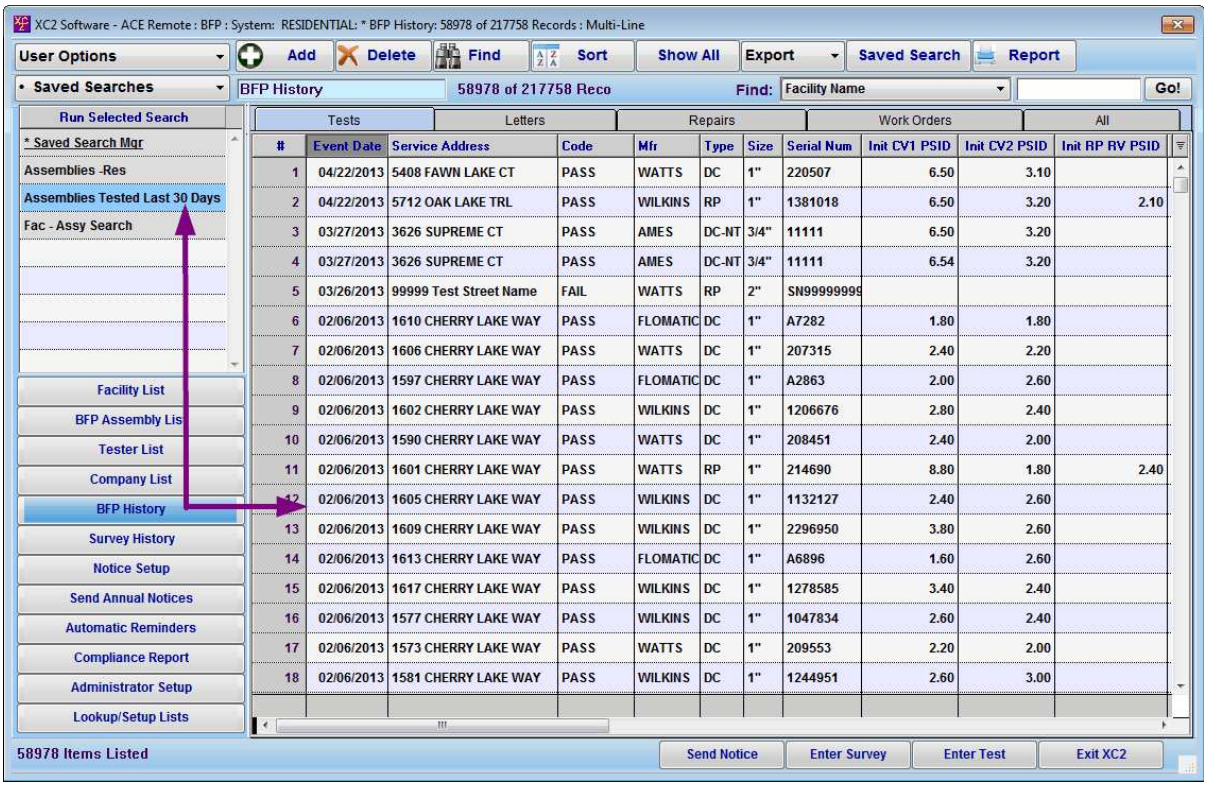


Notes:

You new saved search is now available

3. Double Click to Run Your Saved Search

Saved Search Selection List



#	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

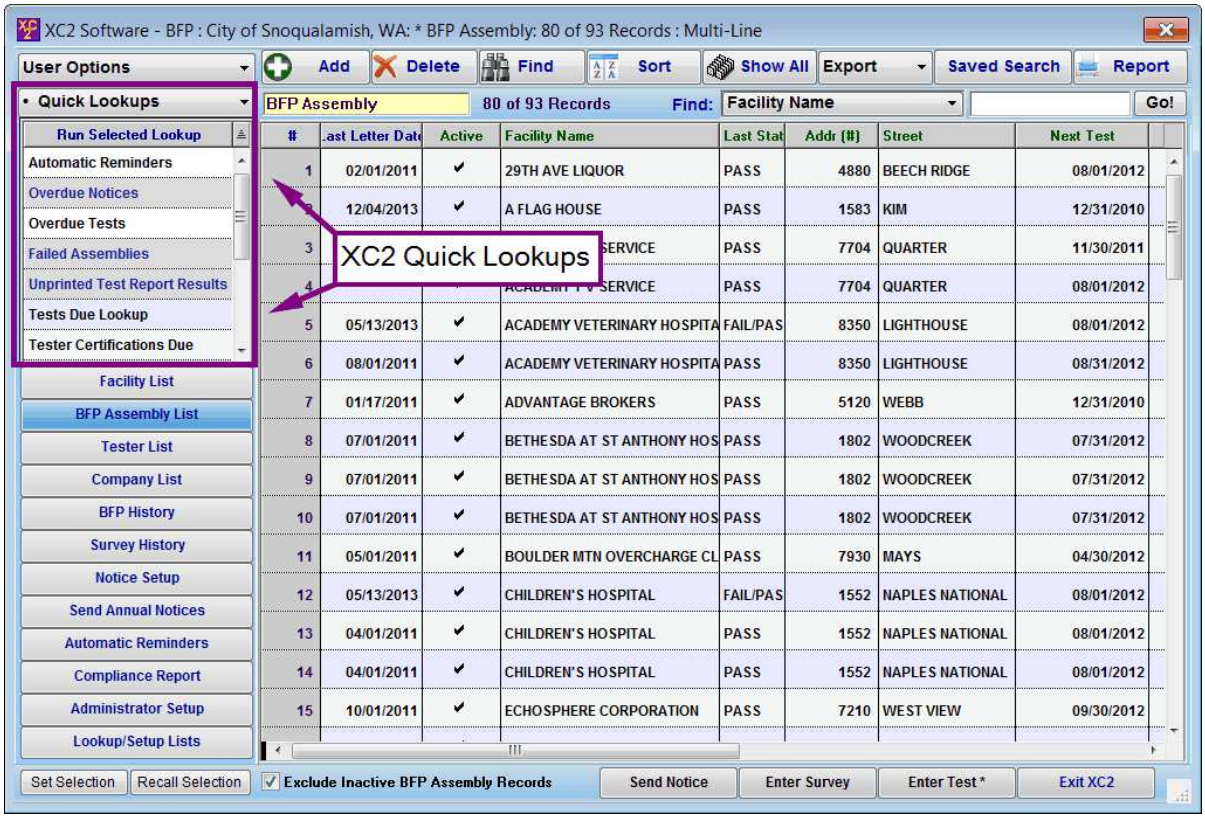
KB Asset ID: 2202

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

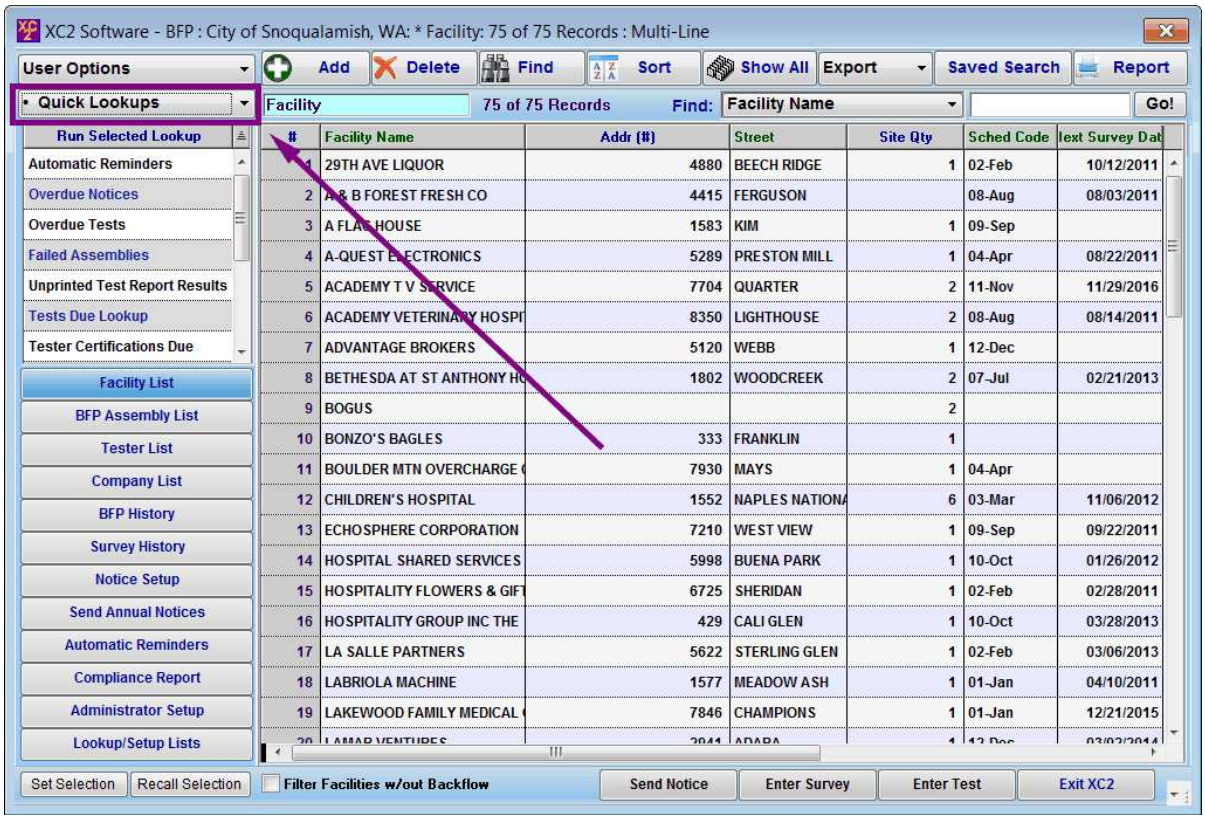


#	Last Letter Dat	Active	Facility Name	Last Stat	Addr (#)	Street	Next Test
1	02/01/2011	✔	29TH AVE LIQUOR	PASS	4880	BEECH RIDGE	08/01/2012
2	12/04/2013	✔	A FLAG HOUSE	PASS	1583	KIM	12/31/2010
3			SERVICE	PASS	7704	QUARTER	11/30/2011
4			SERVICE	PASS	7704	QUARTER	08/01/2012
5	05/13/2013	✔	ACADEMY VETERINARY 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

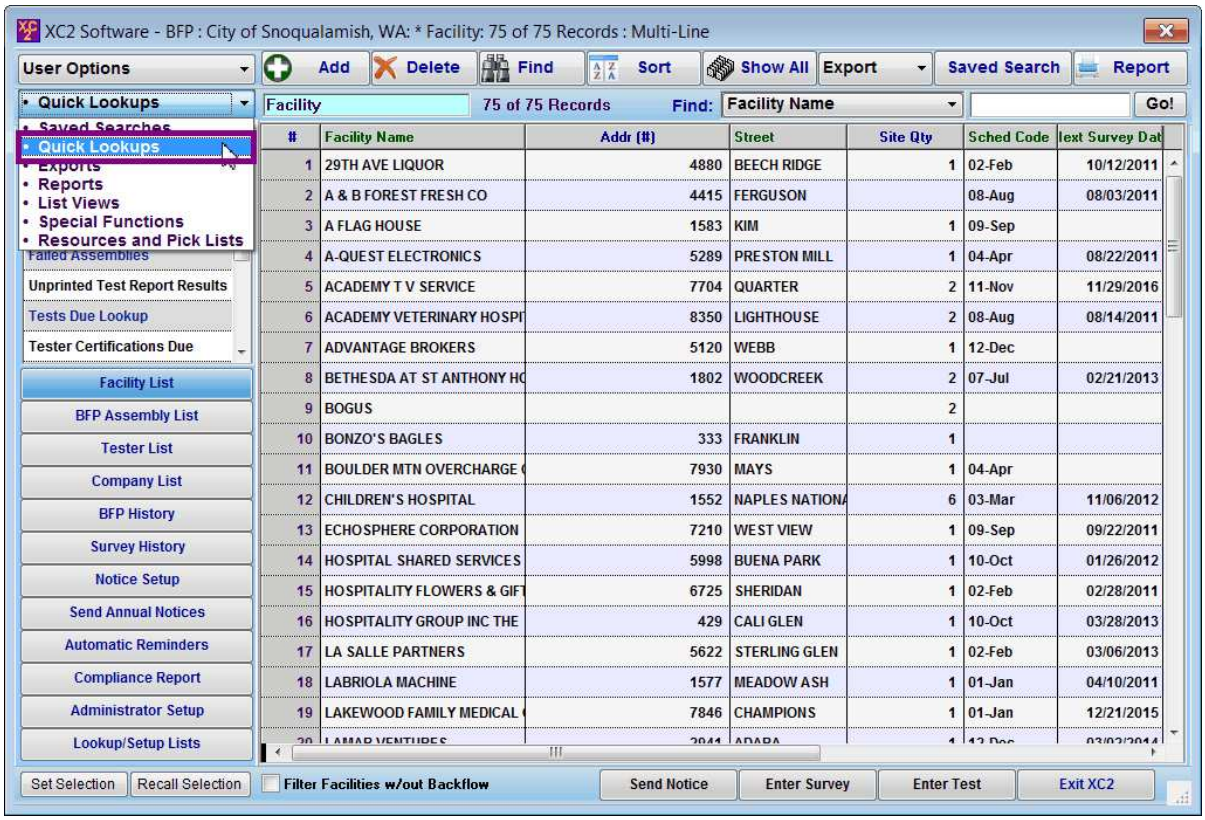
Quick Lookups can be accessed from the Main Screen pull-down menu in the upper left corner of the screen.



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.



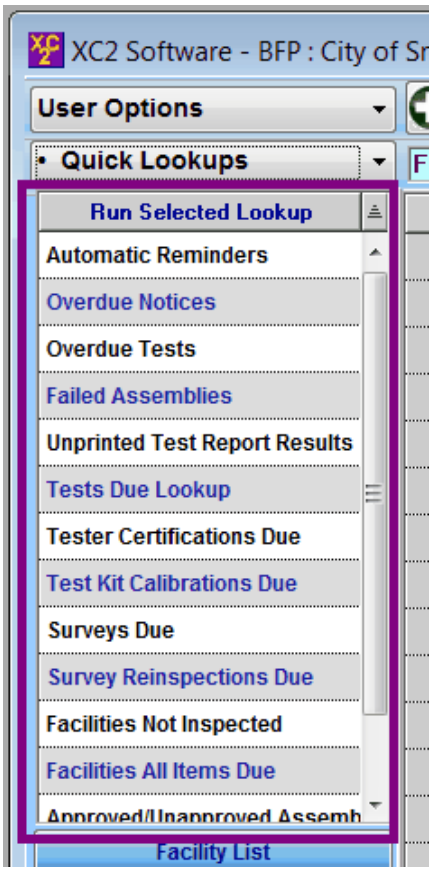
Notes:

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.

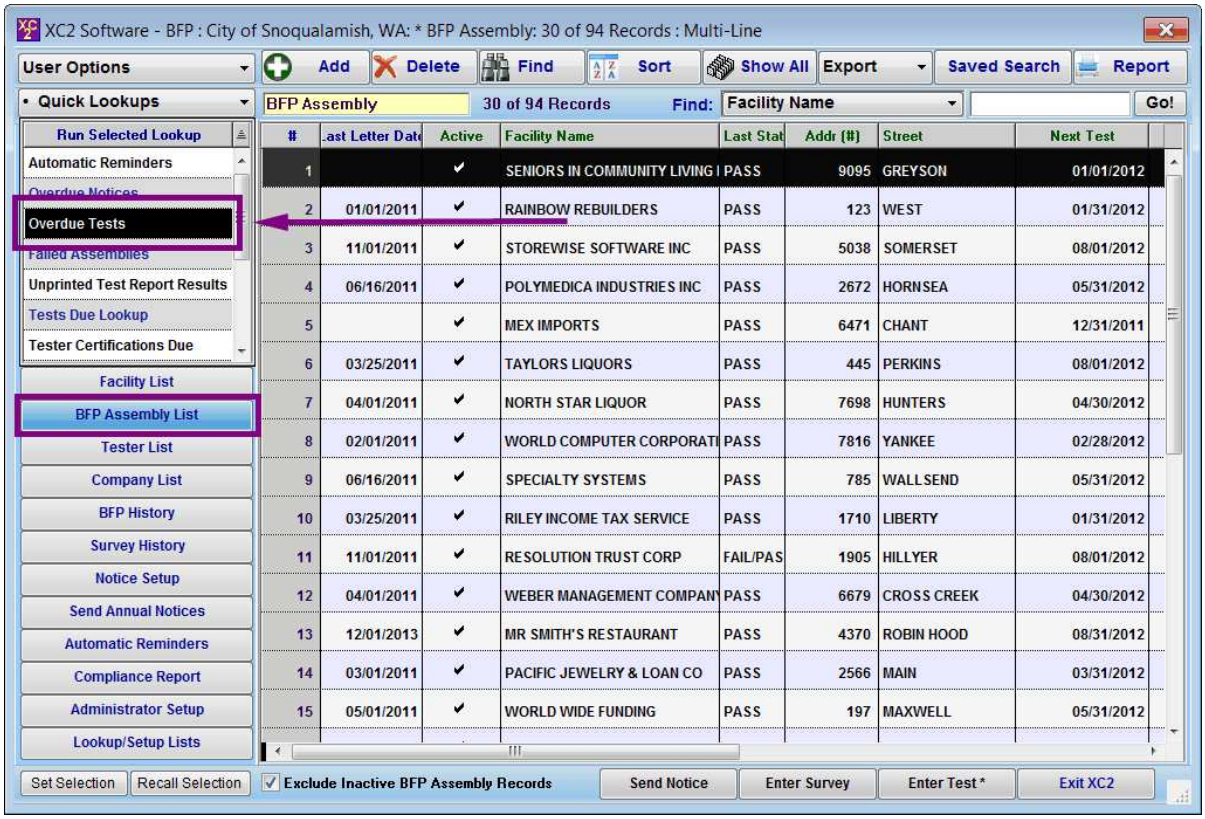


Notes:

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.



Notes:

XC2 Software Knowledge Base

How to Create a New Export File

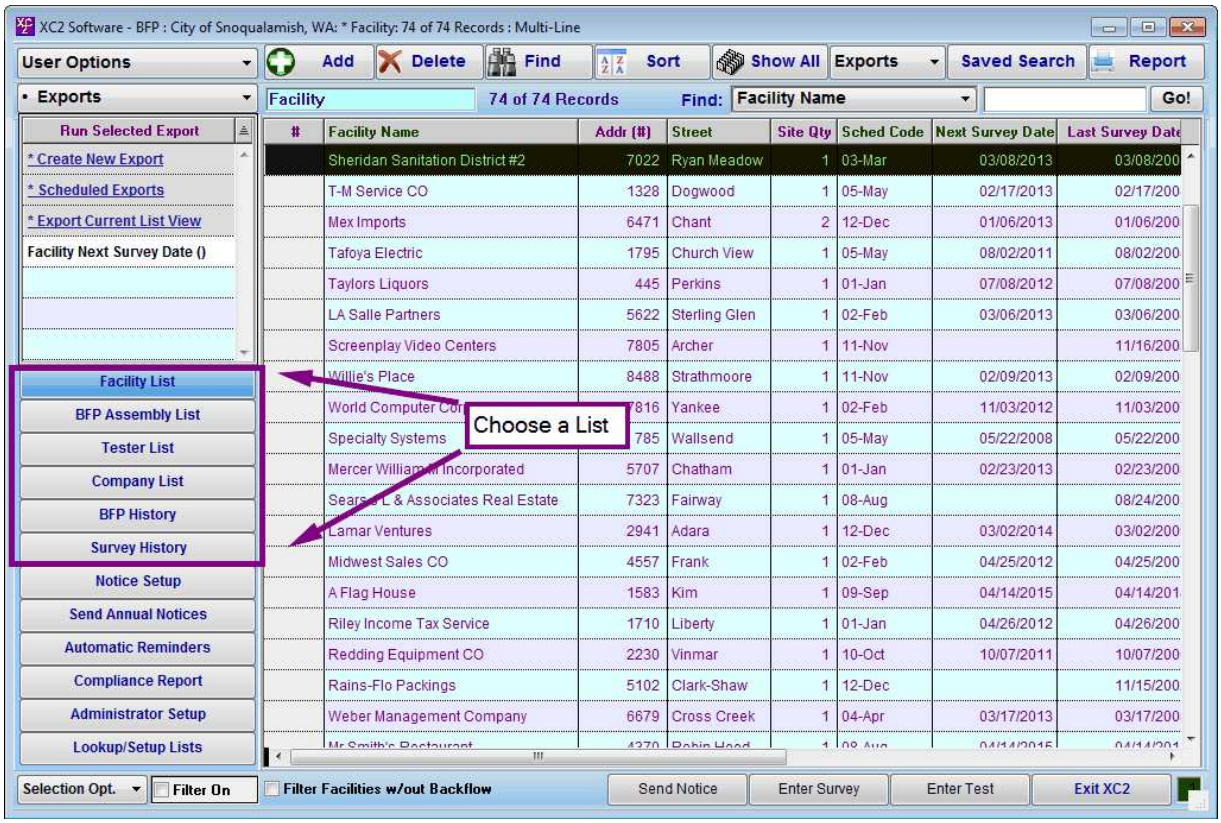
KB Asset ID: 2849

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.

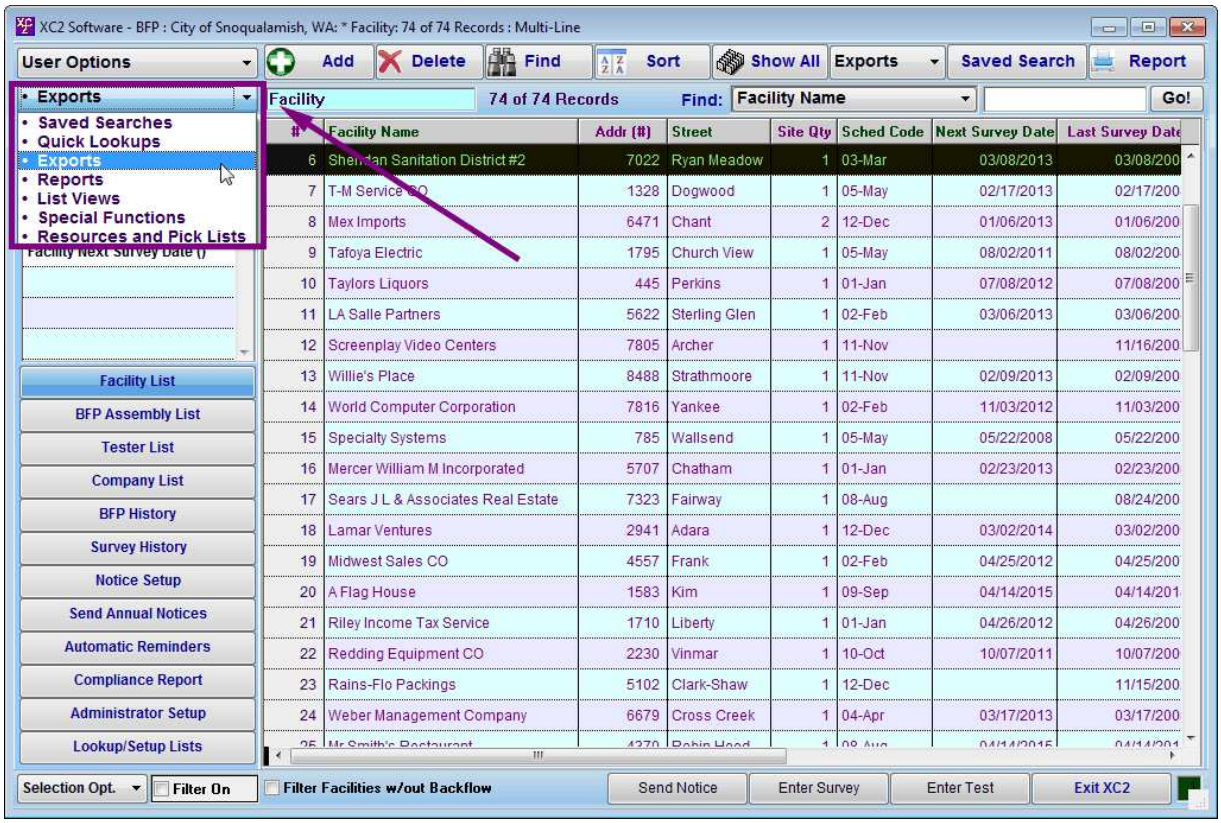
Here I want to export a list of Facility records so I selected the Facility List on the Main Page



Notes:

Export Manager

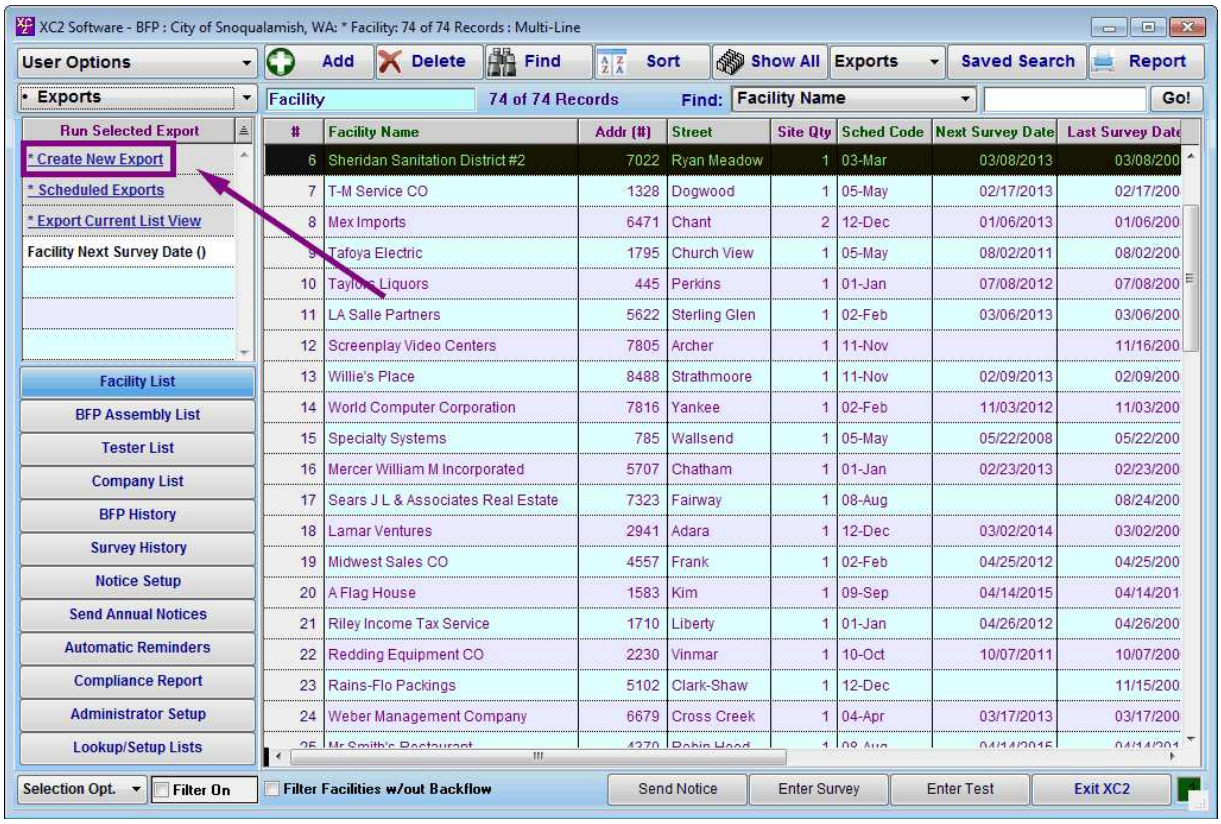
Under the pull-down menu, In the top left portion of the main page, select Exports



#	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	Taylors 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

Notes:

Select Create New Export



Notes:

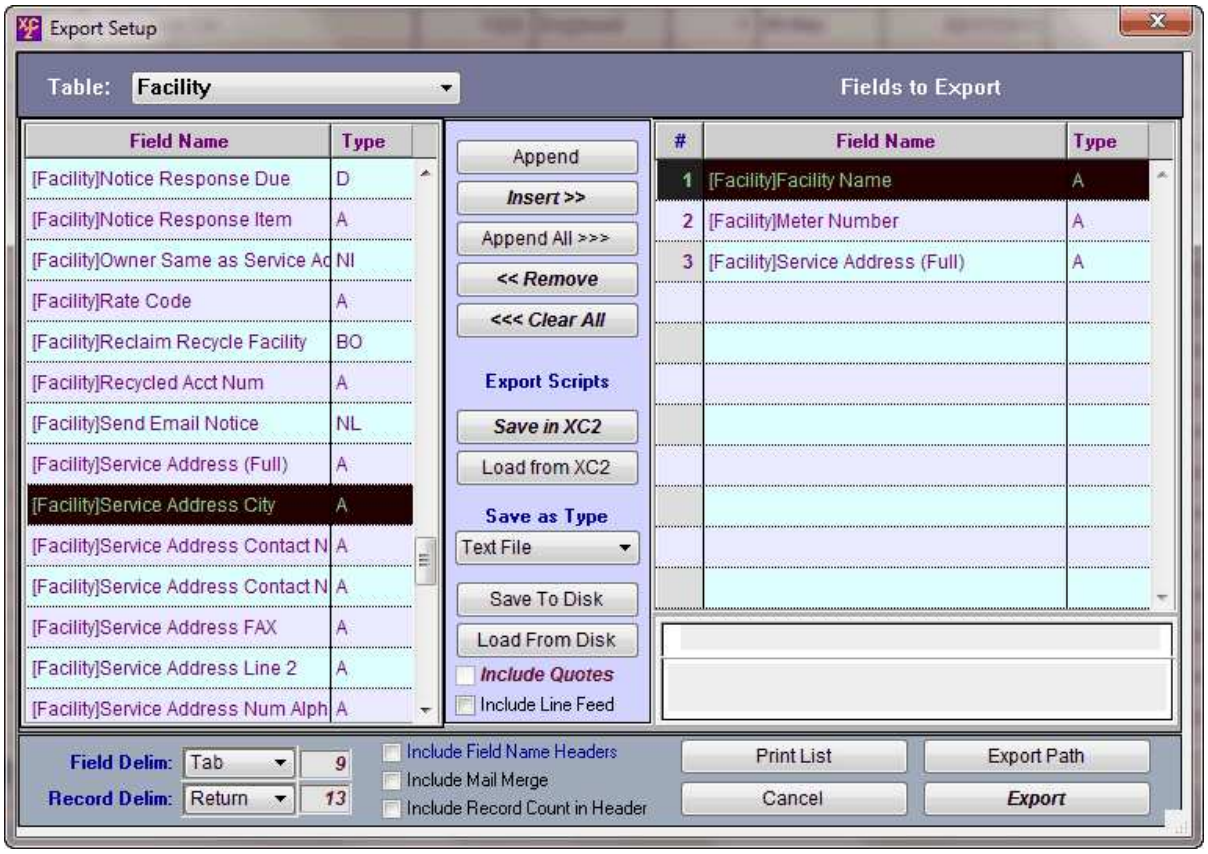
Select Fields to Export

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

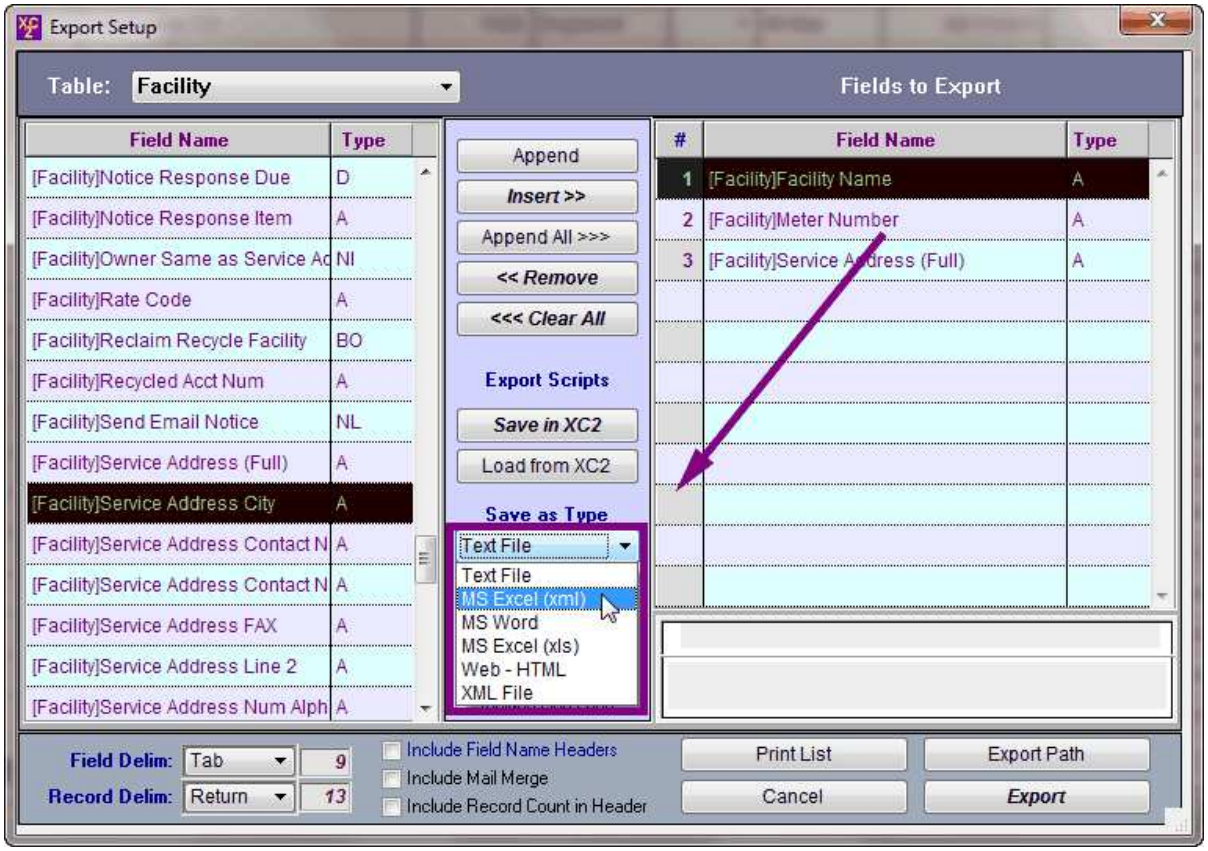


Notes:

Select File Type

Select the file type.

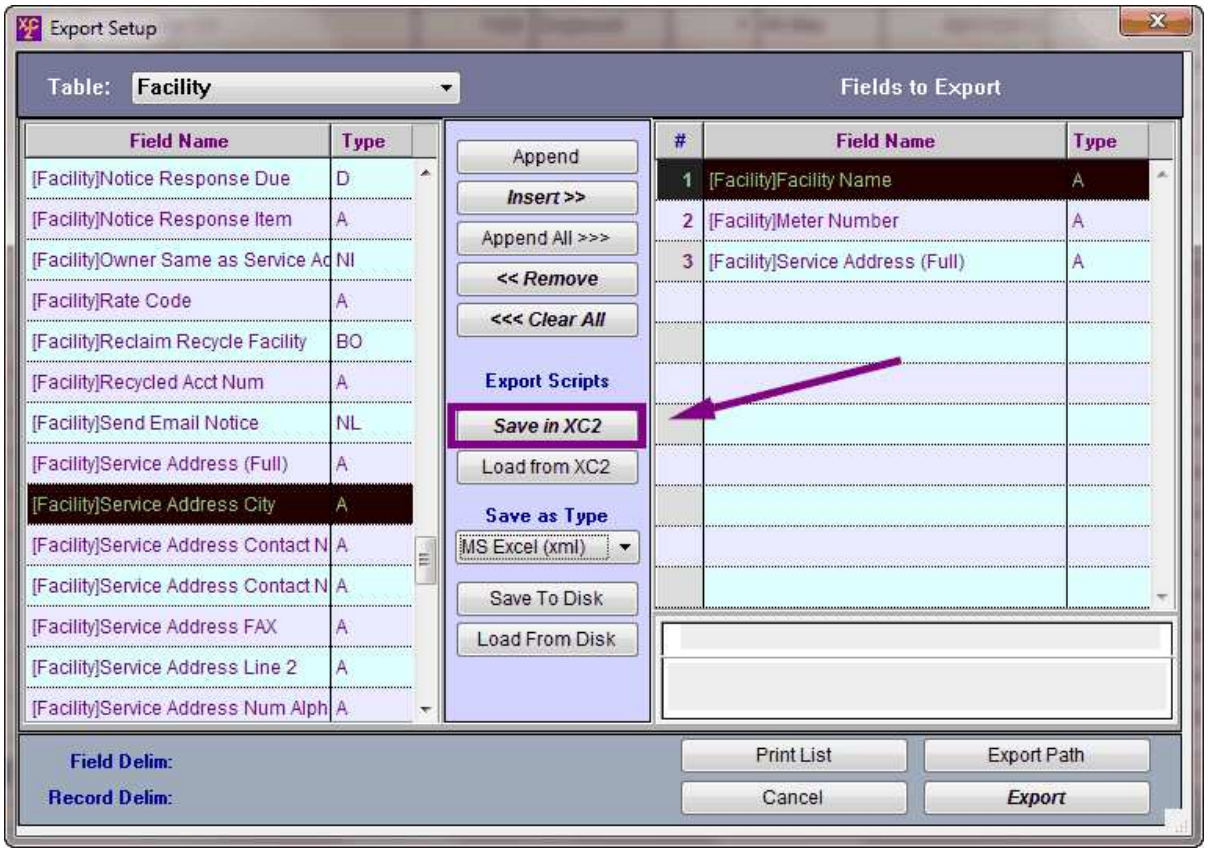
Here I selected an Excel file type



Notes:

Save Export

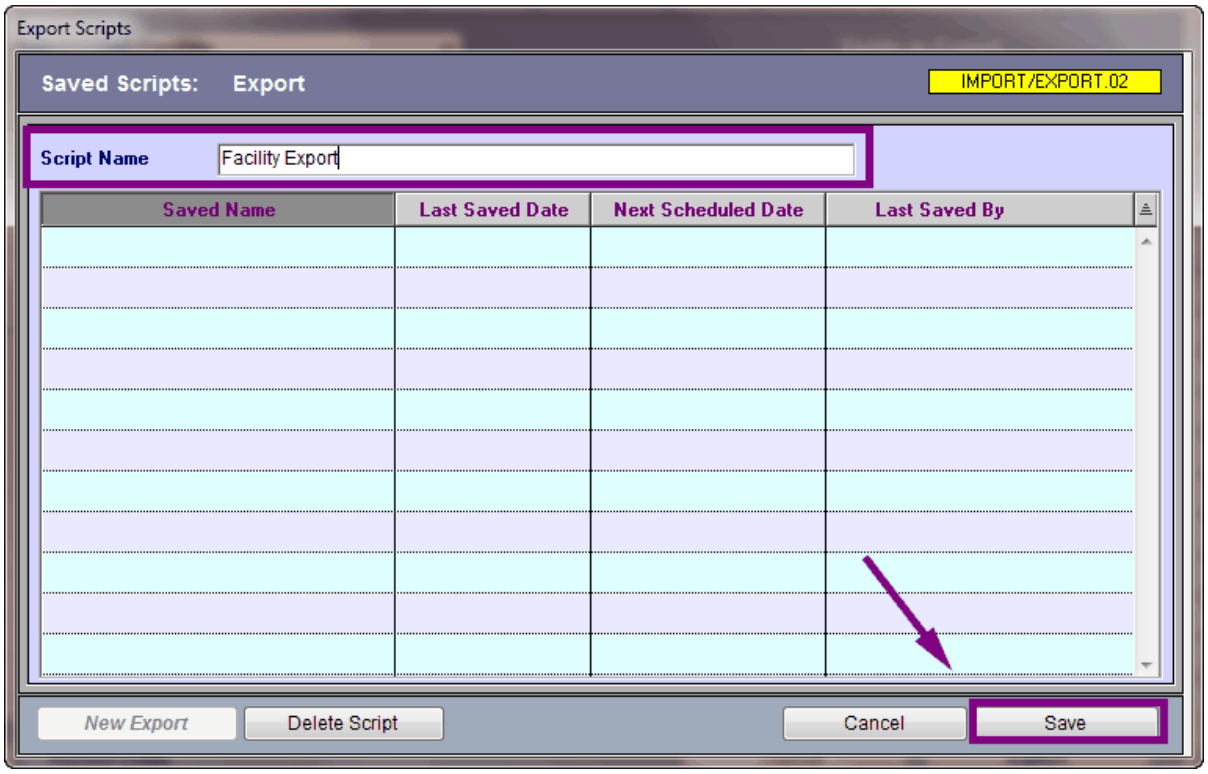
When you are done creating the Export File, save the export by clicking Save in XC2



Notes:

Give The Export a Name

Name the export and click Save



Notes:

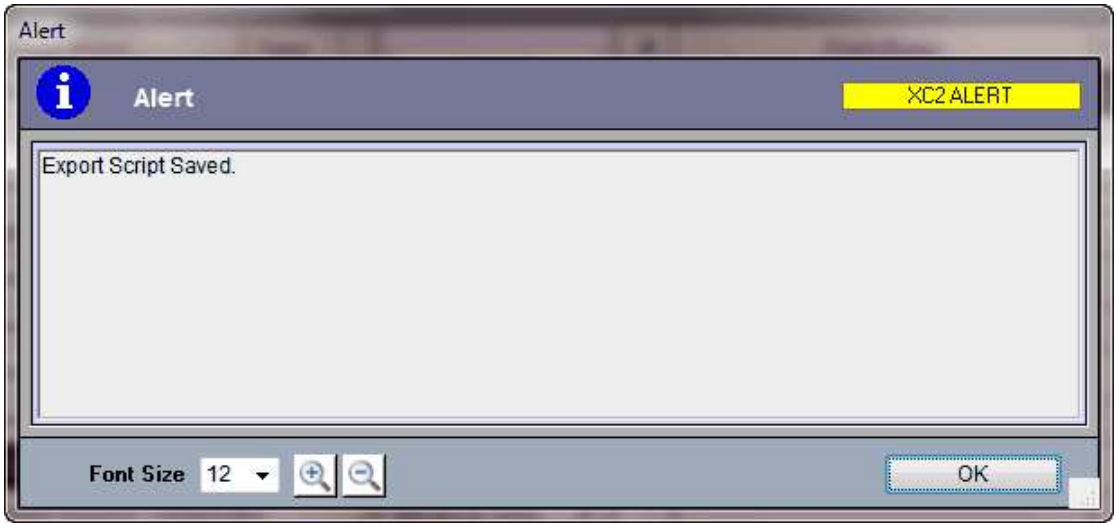
Do not save export path

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

Notes:

Click OK

Click Ok to Confirm

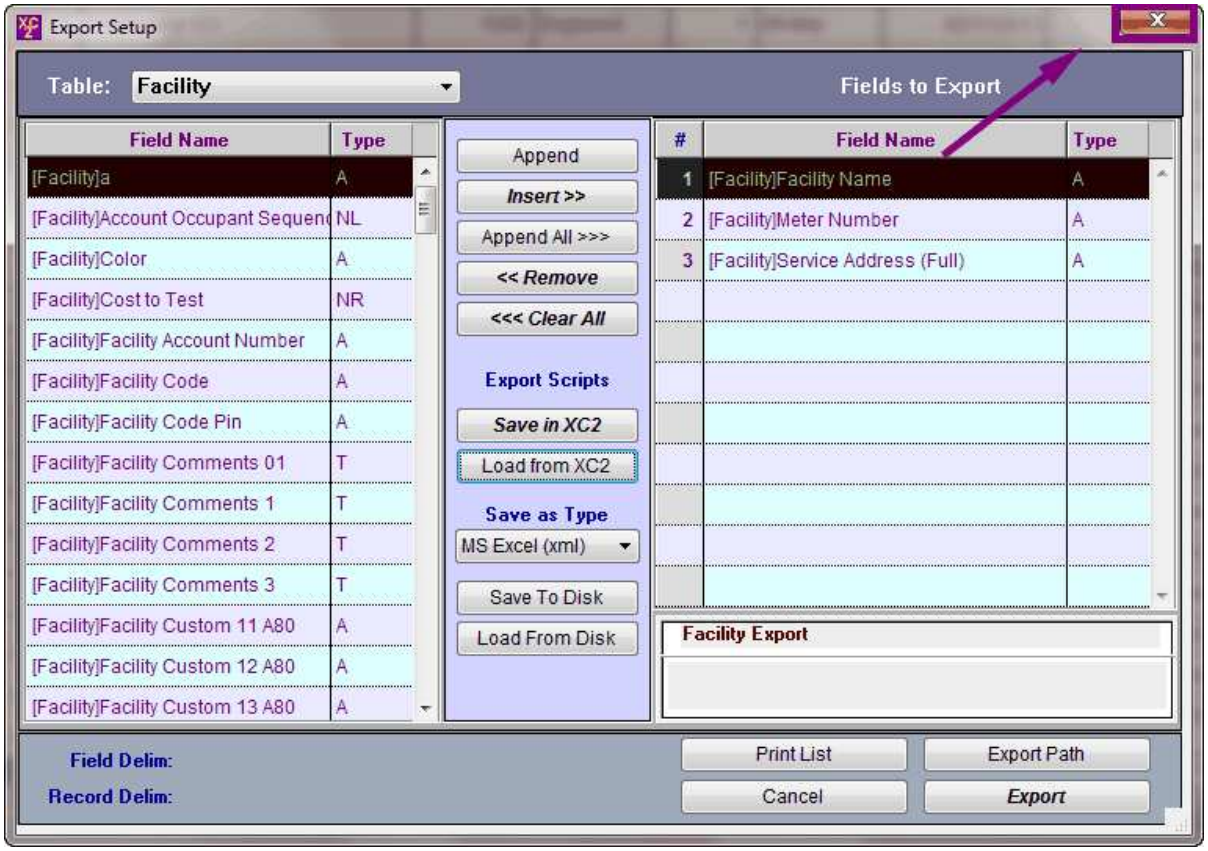


Notes:

You are Finished

You are now finished creating the export.

Click the red X to close the export manager.

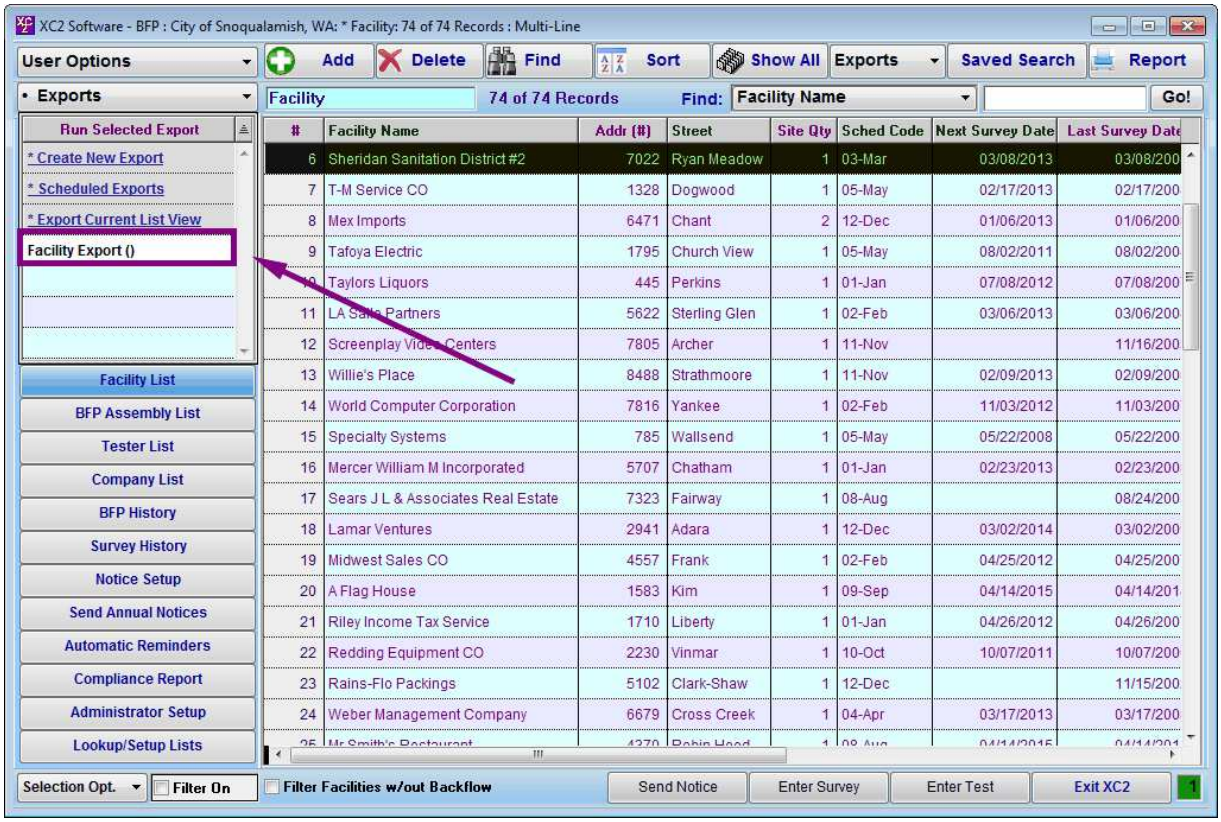


Notes:

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

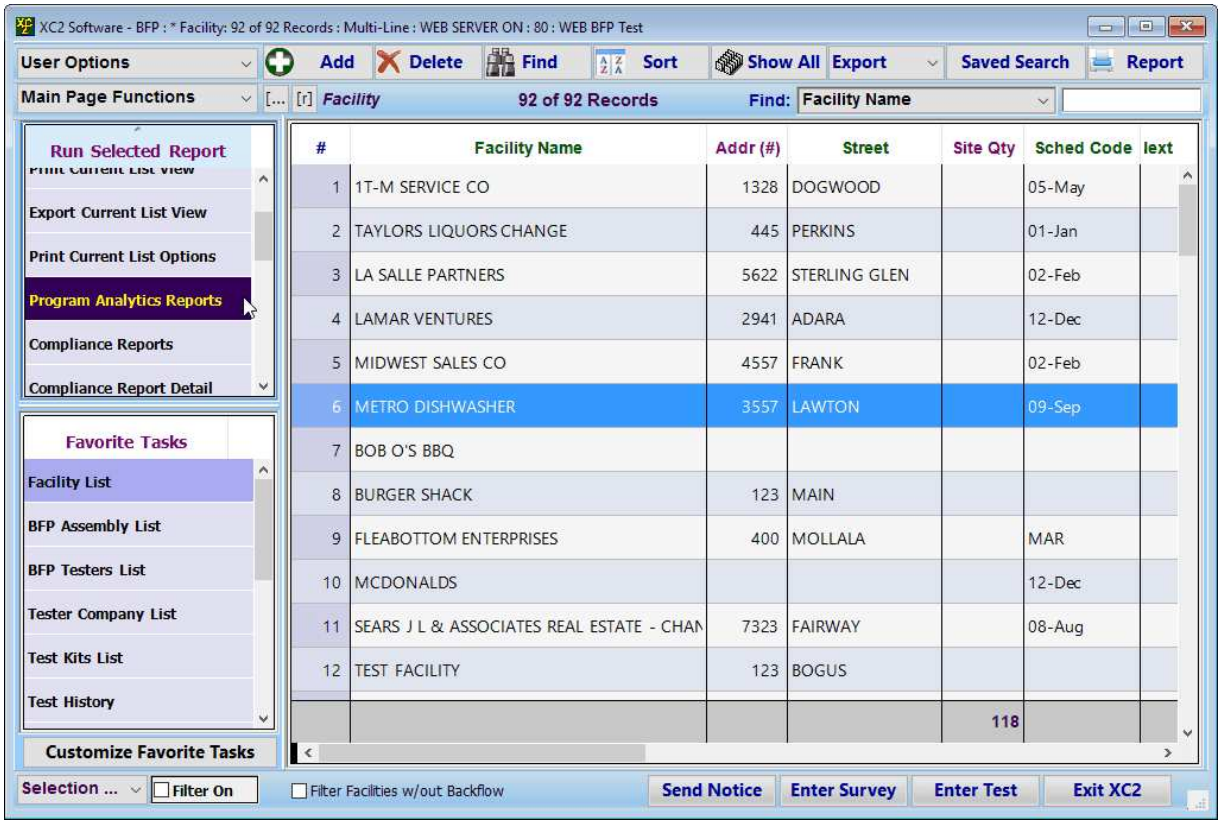
Reports

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



Notes:

XC2 Software Knowledge Base

How to Create a Custom List View

KB Asset ID: 2260

This page describes how to customize list views in XC2

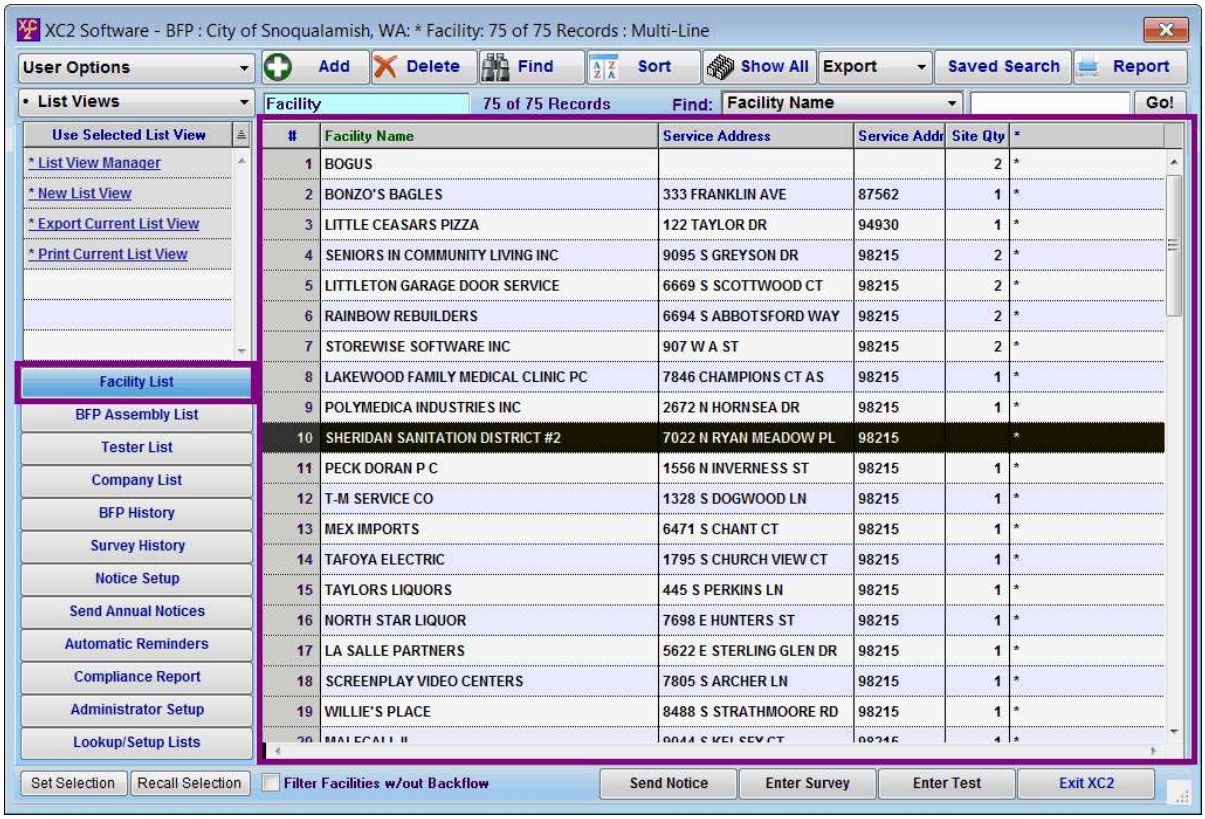
What is a List View?

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.

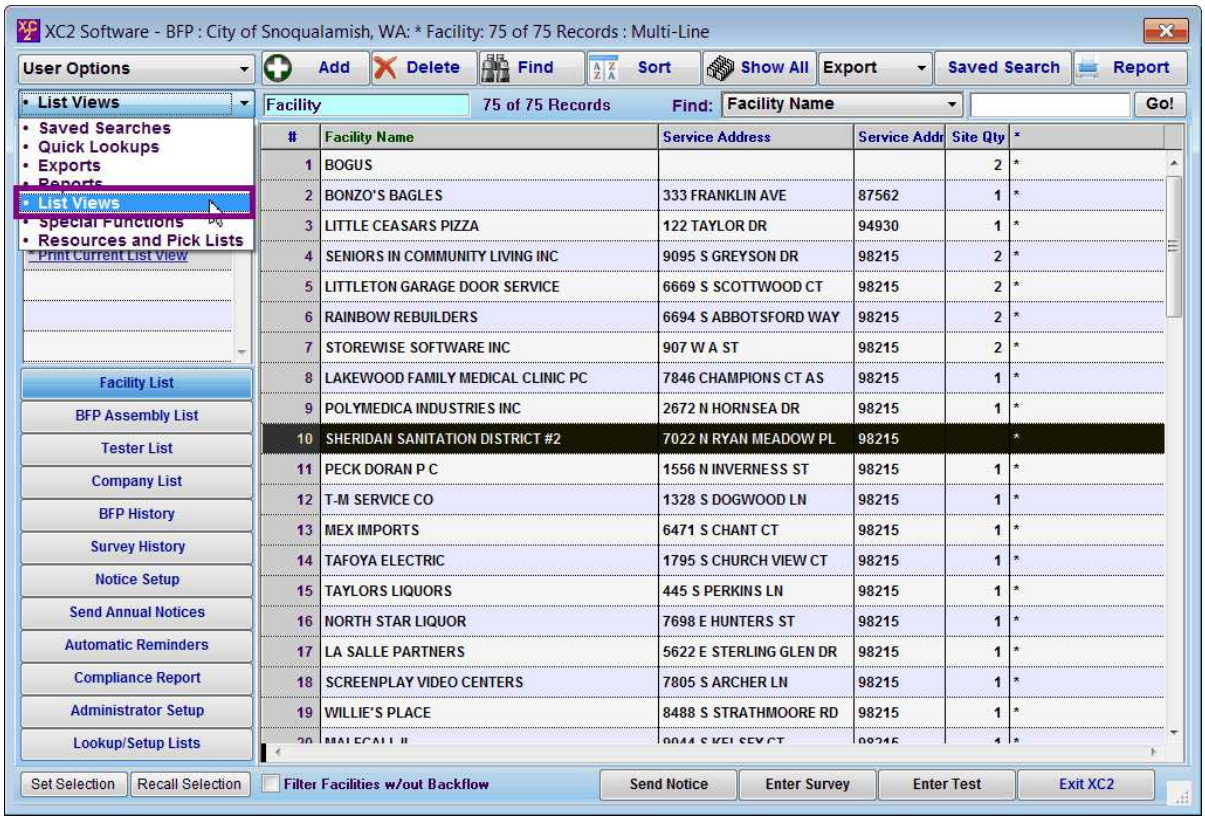
In XC2 you can create multiple List Views and access each list by the click of a button.



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.

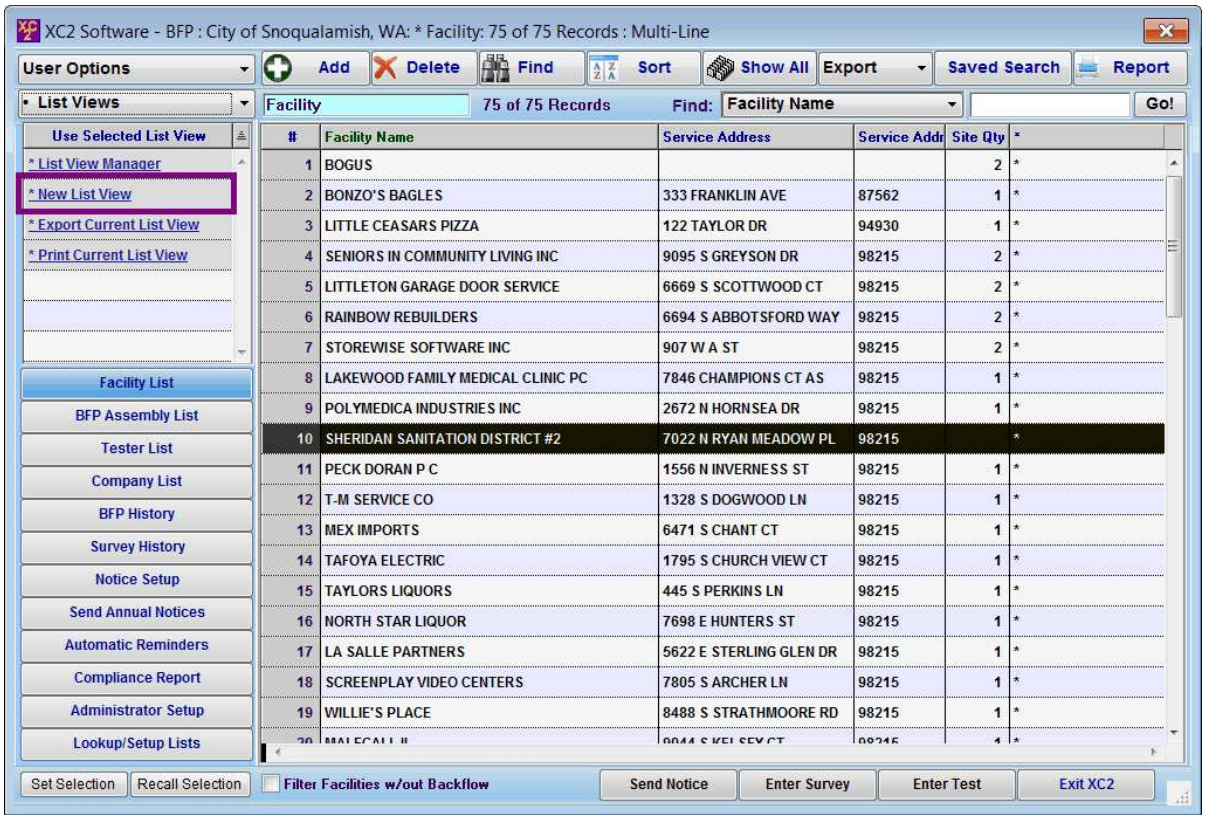


#	Facility Name	Service Address	Service Addr	Site Qty	*
1	BOGUS			2	*
2	BONZO'S BAGLES	333 FRANKLIN AVE	87562	1	*
3	LITTLE CEASARS PIZZA	122 TAYLOR DR	94930	1	*
4	SENIORS IN COMMUNITY LIVING INC	9095 S GREYSON DR	98215	2	*
5	LITTLETON GARAGE DOOR SERVICE	6669 S SCOTTWOOD CT	98215	2	*
6	RAINBOW REBUILDERS	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	*

Notes:

New List View

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



Notes:

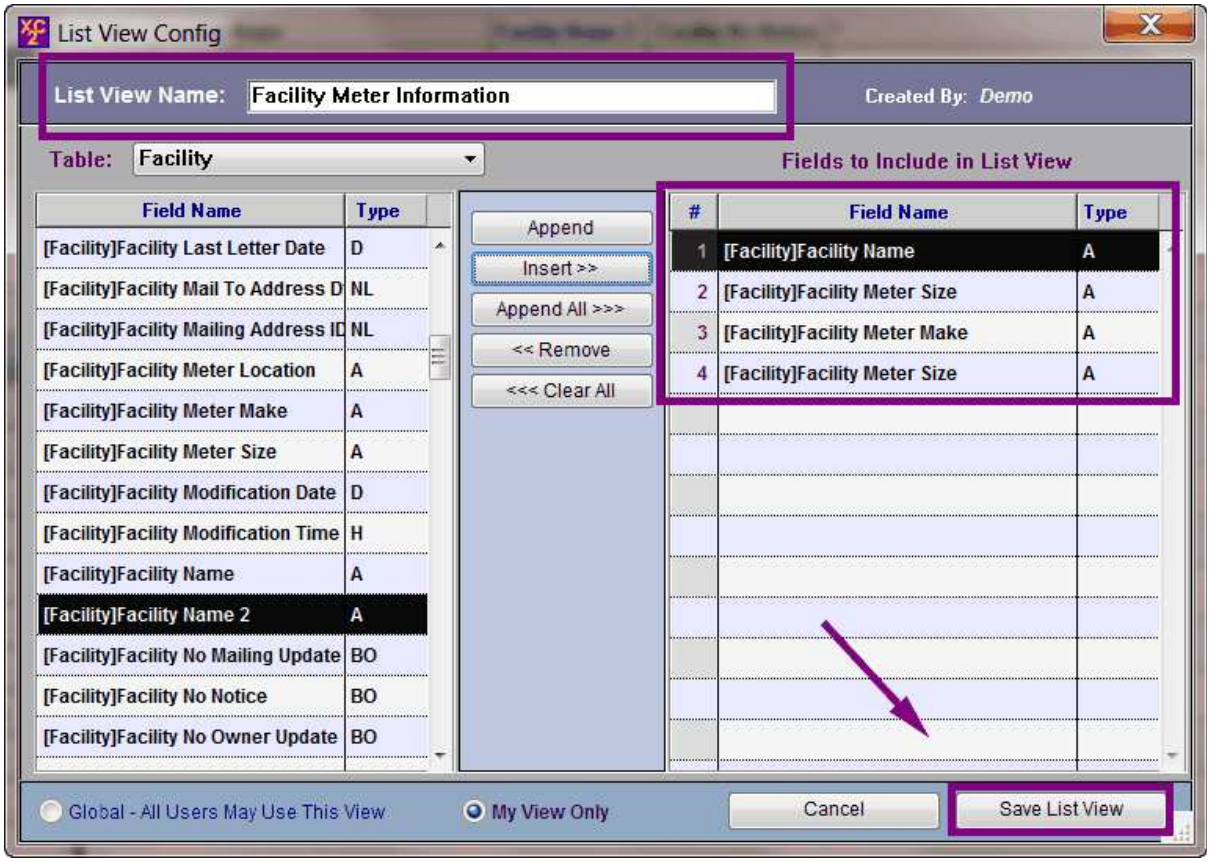
Create New List

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.

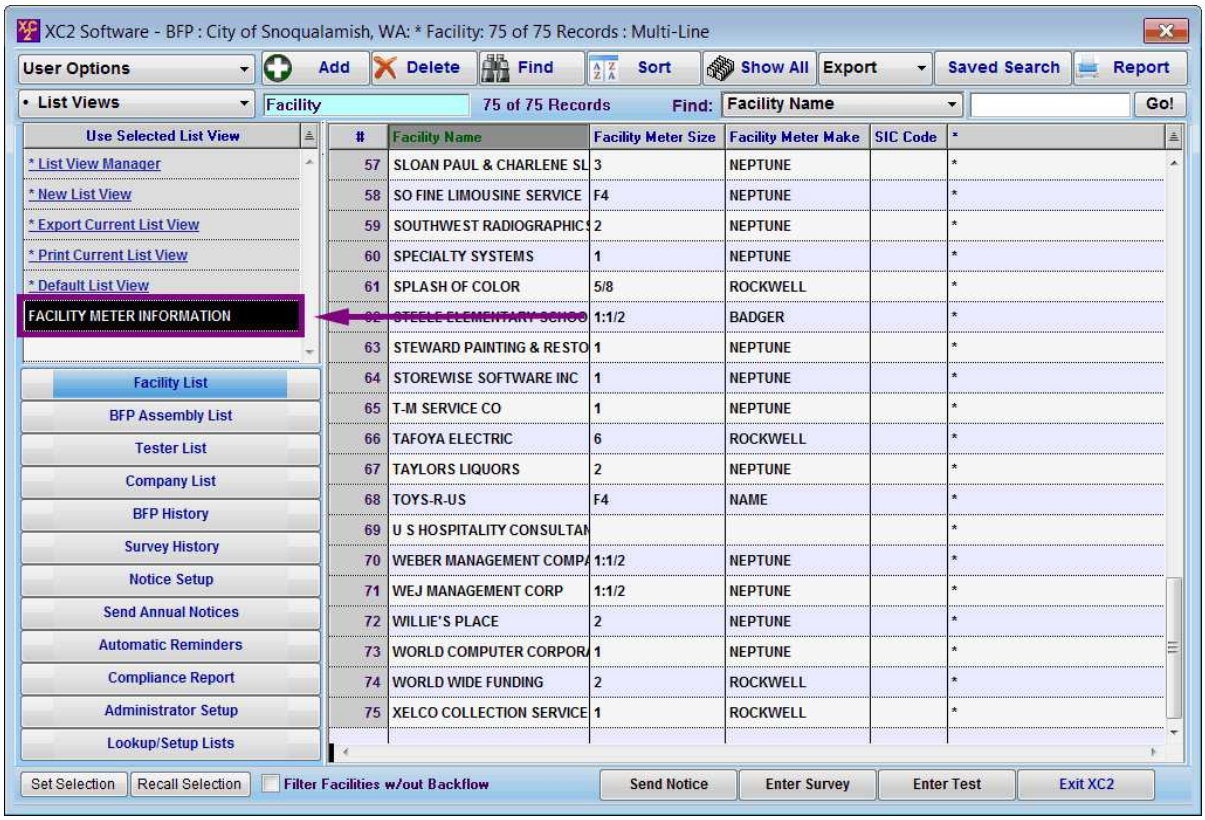


Notes:

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.

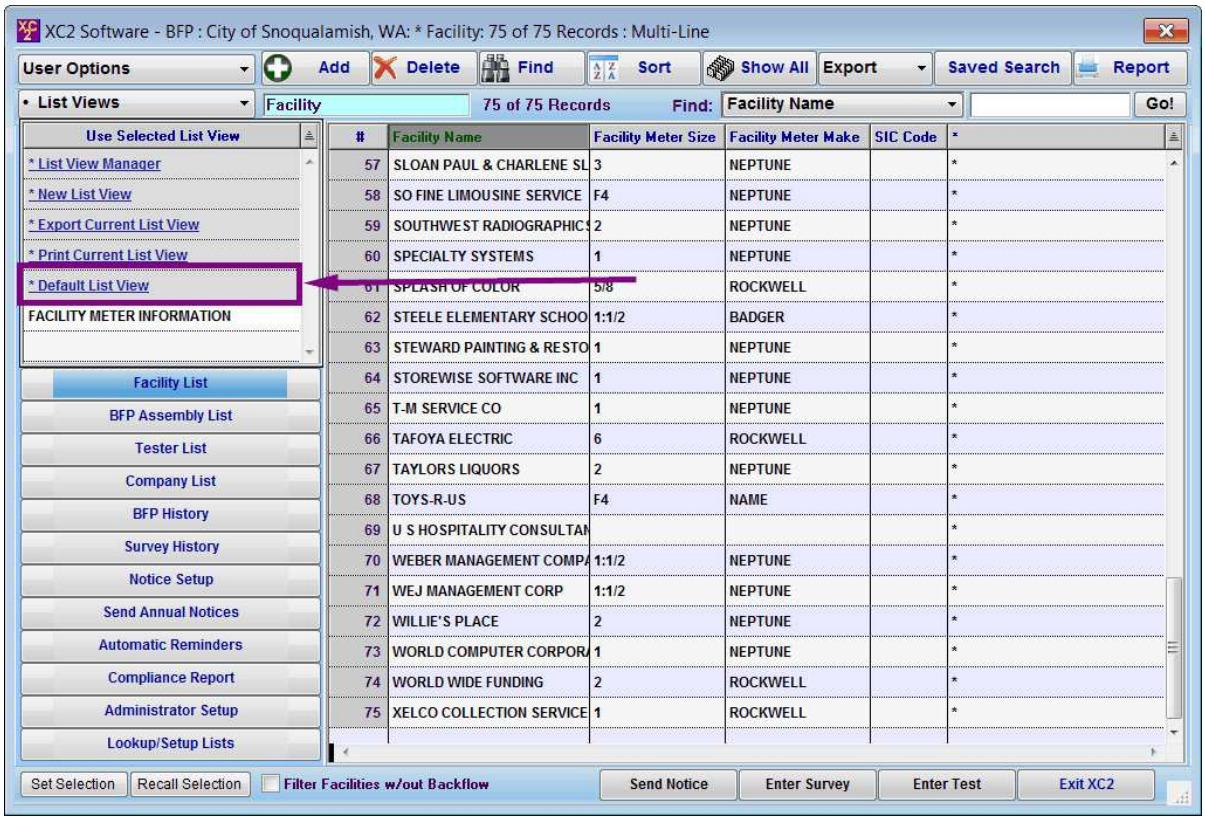


Notes:

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.

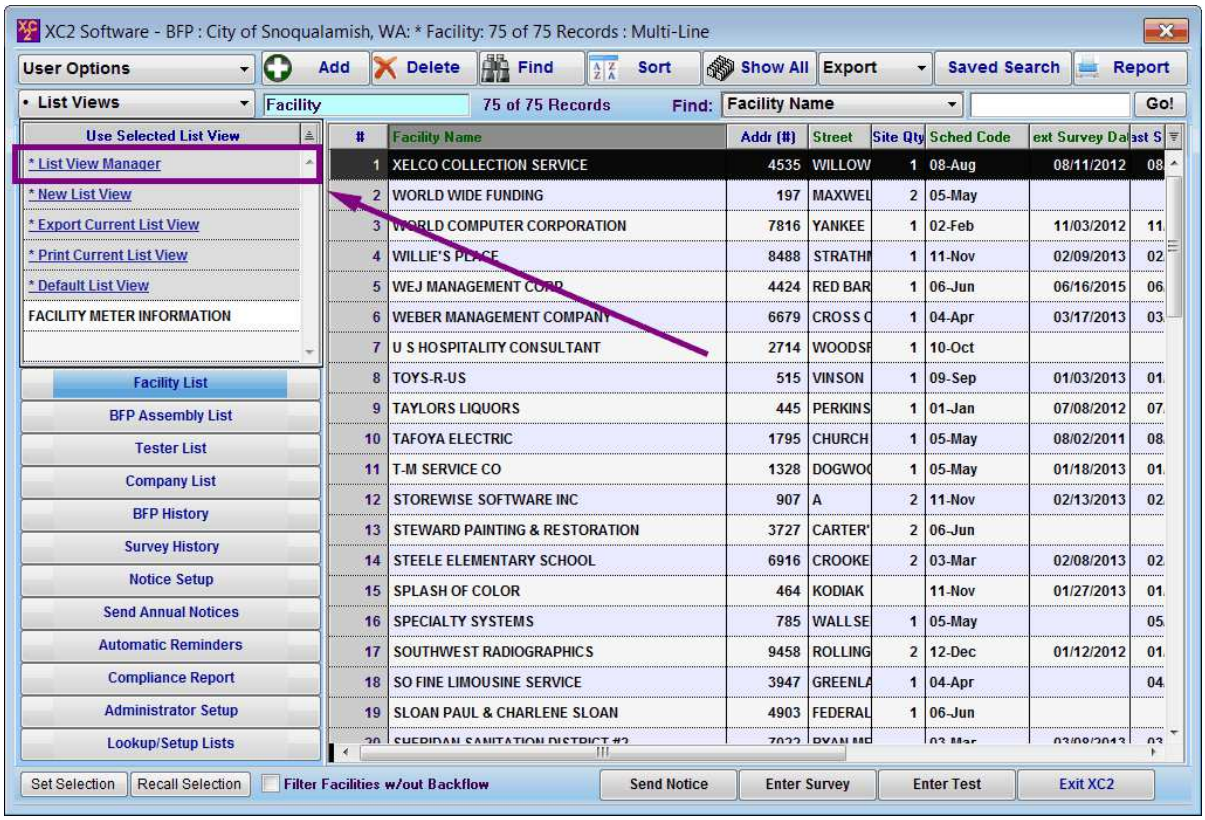


Notes:

Editing Your List View

If you want to edit previously made List Views

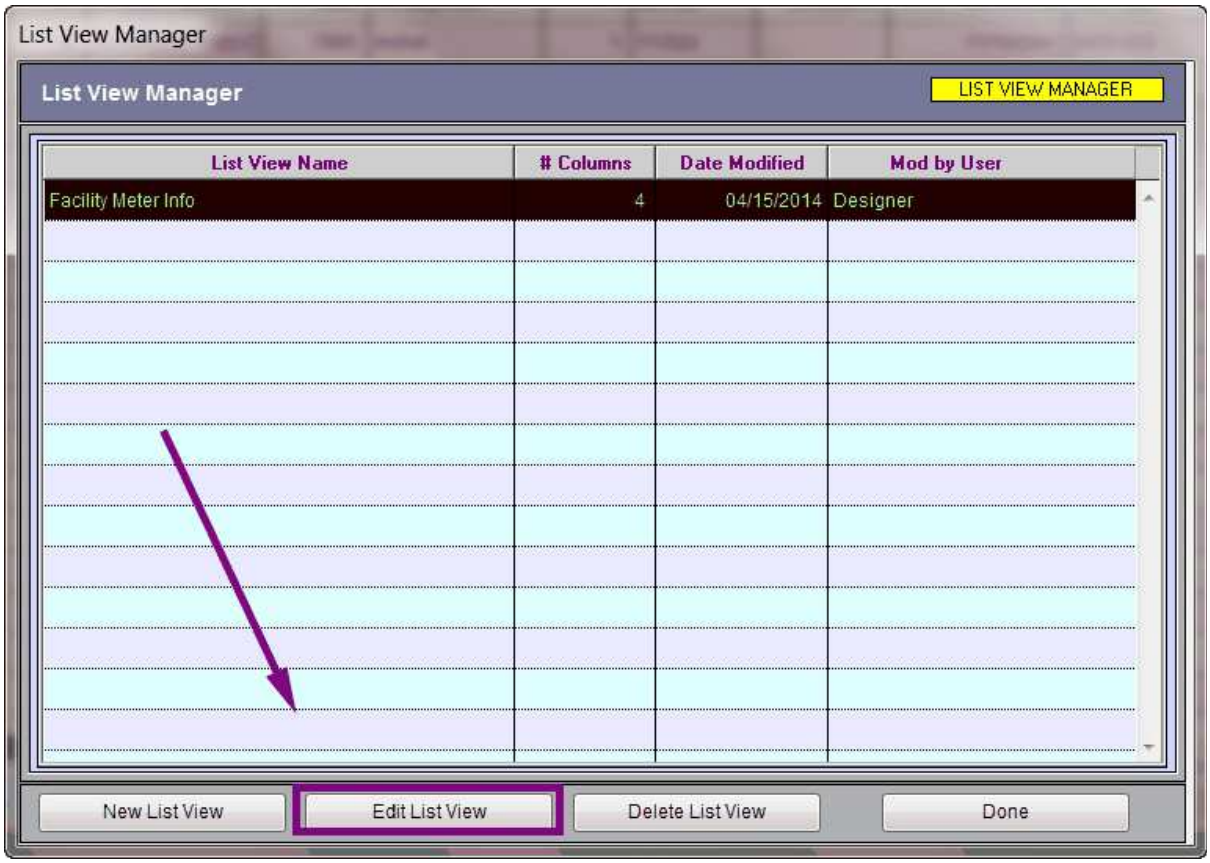
Select List View Manager in the List View pulldown menu.



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

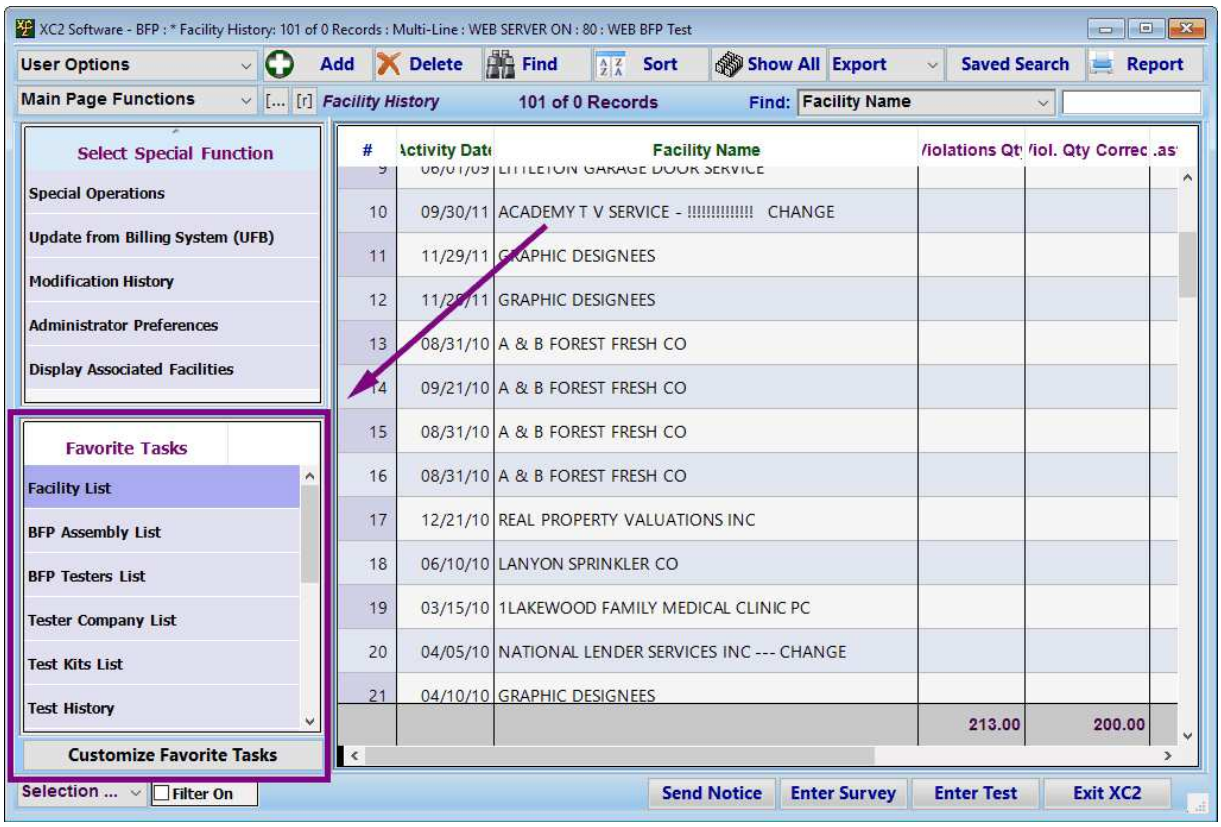
Using Favorite Tasks

KB Asset ID: 3514

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

Favorite Tasks

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



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.

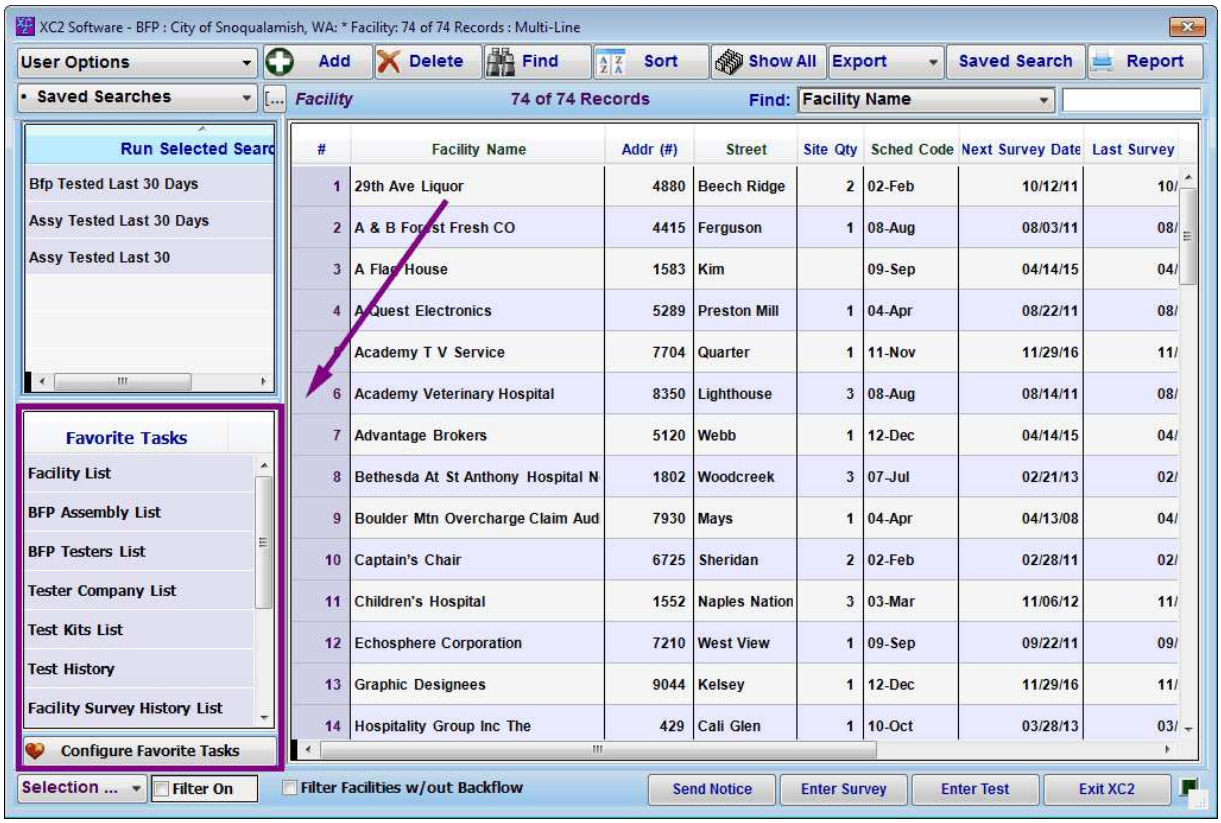
The picture below shows where this section is located on the Main Page.

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.



Notes:

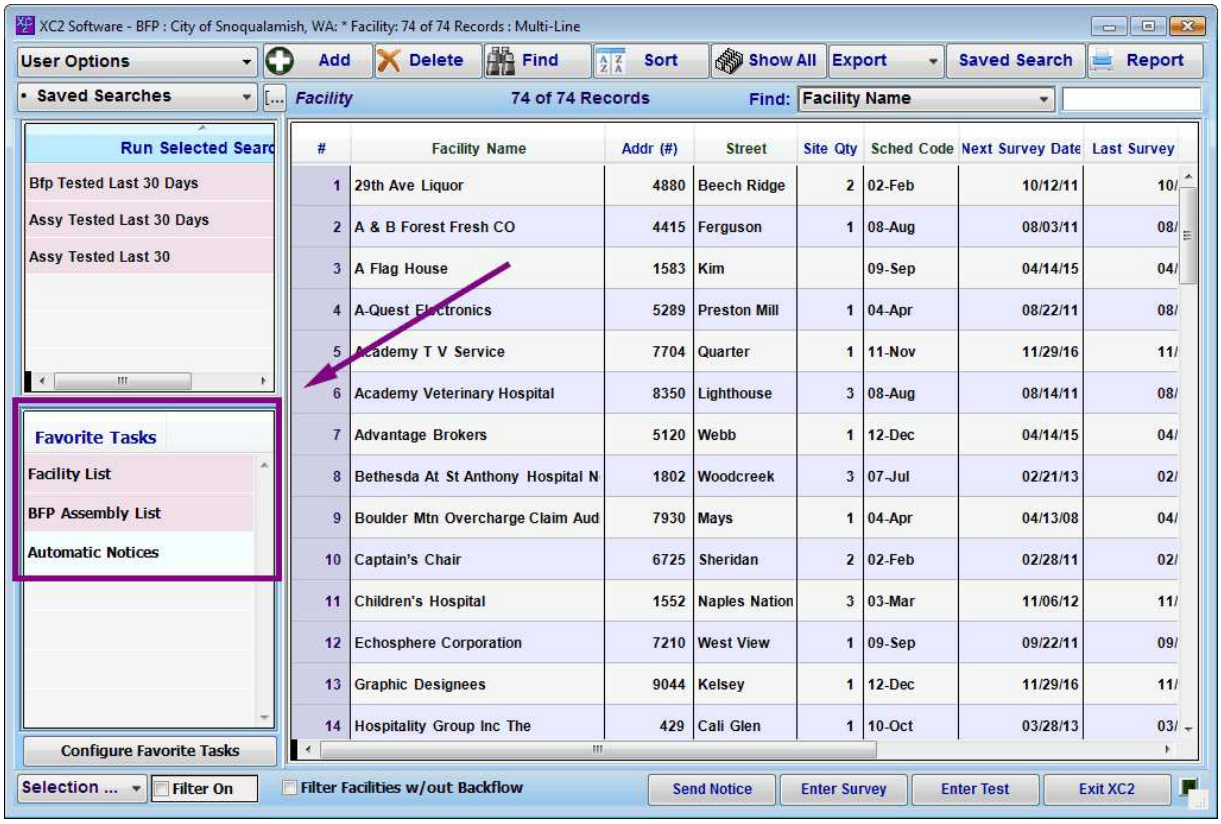
How to make Favorite Tasks look the way you want

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

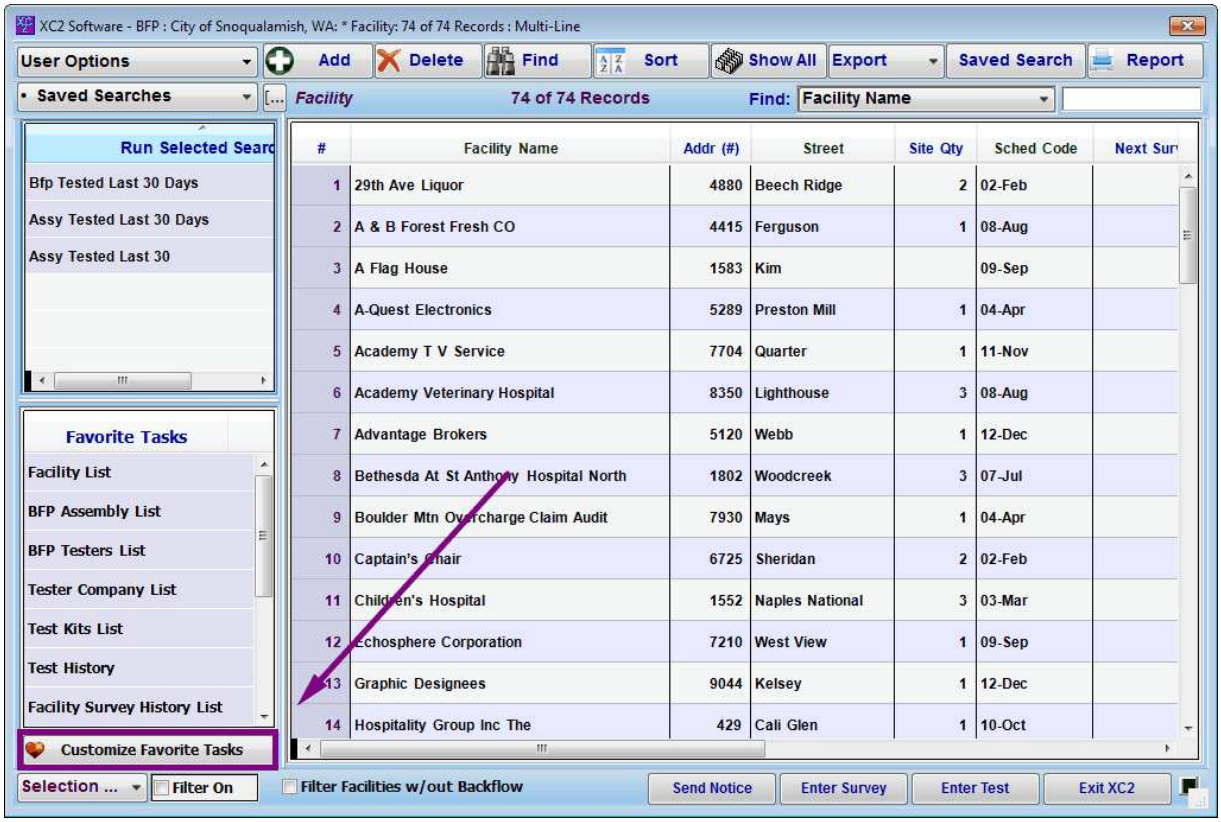


Notes:

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



Notes:

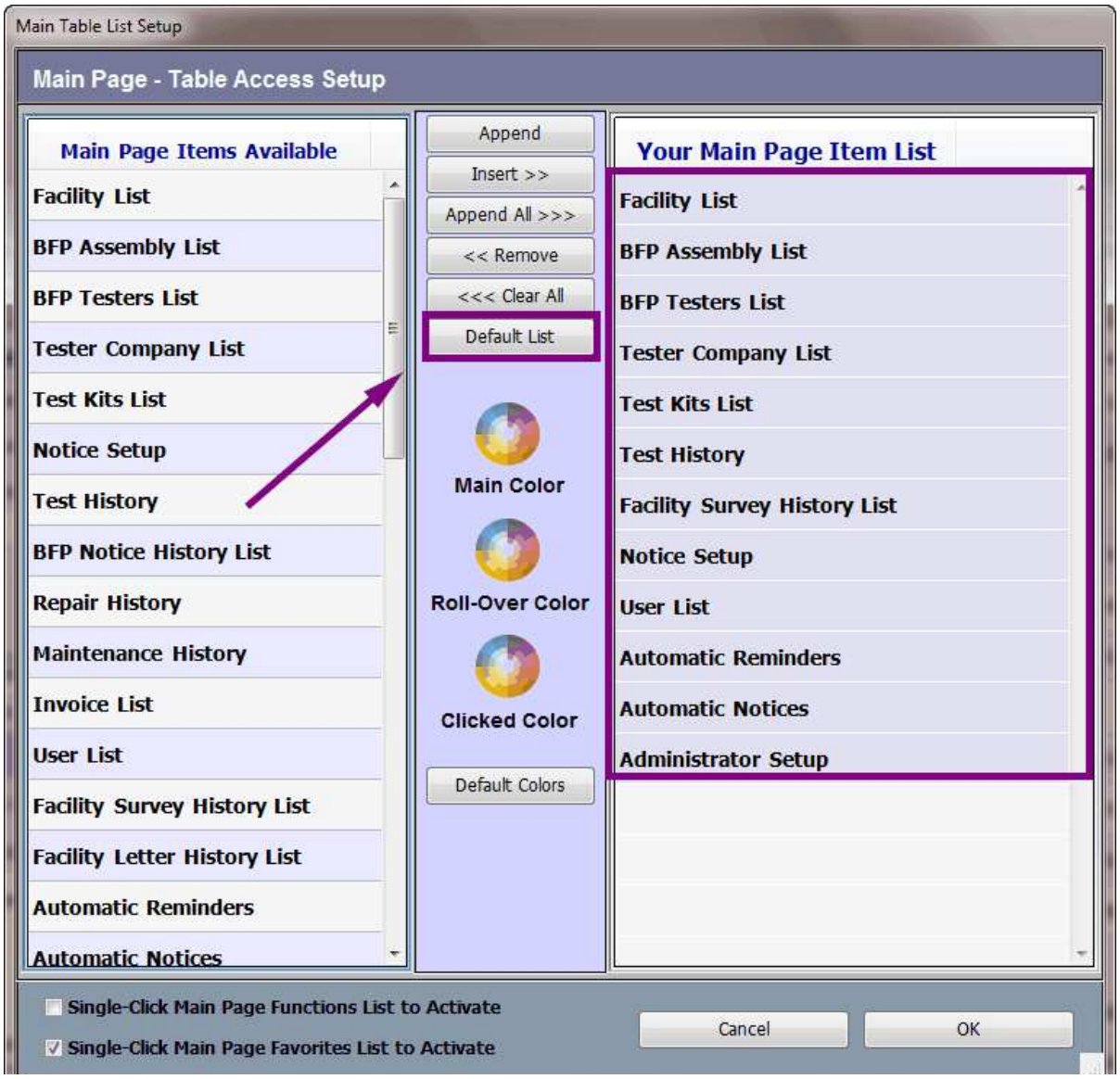
Default List

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

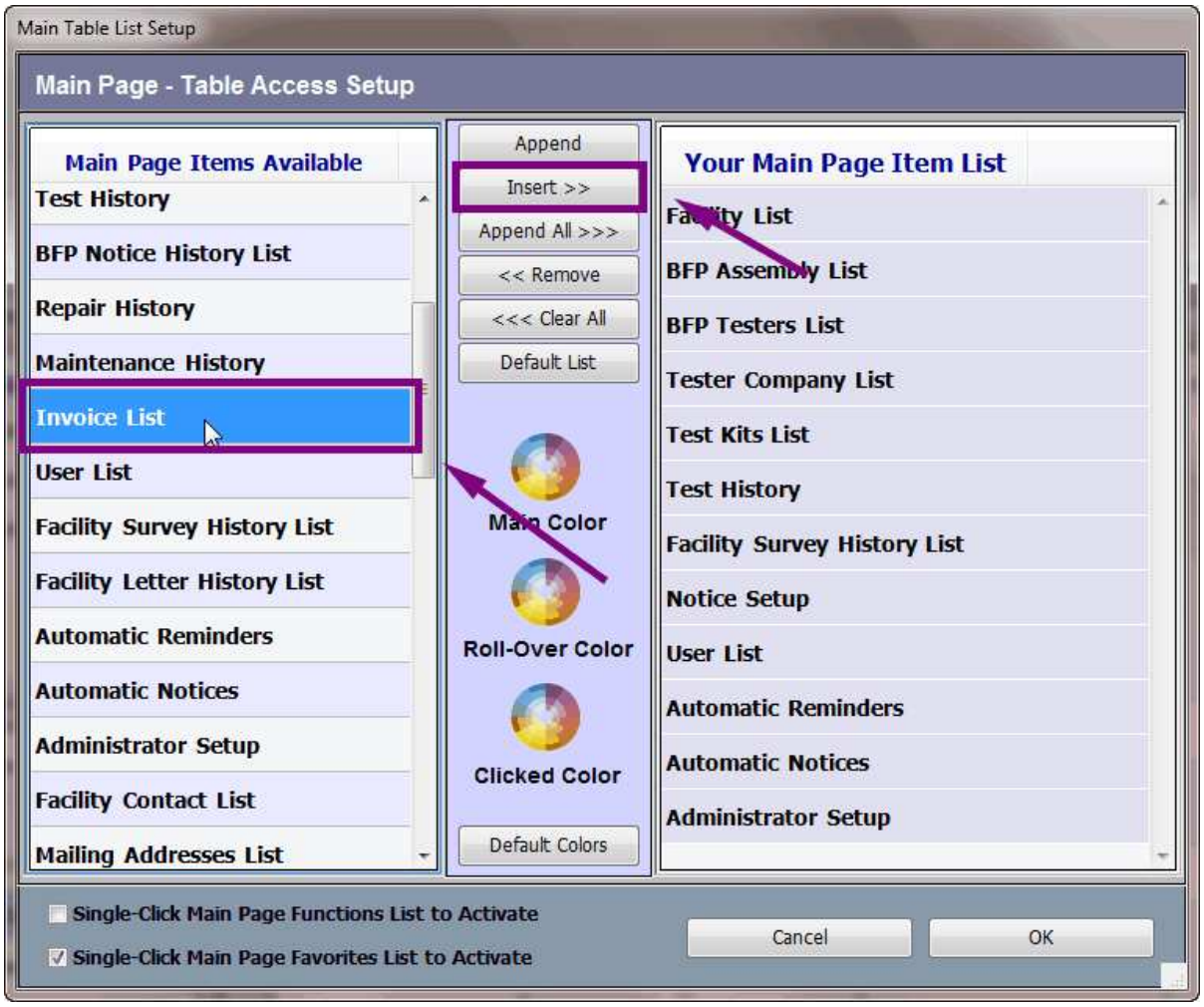
You may rearrange this list in any order you like by highlighting the list name and dragging and dropping it into the location you want. You can also remove or add items.

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.

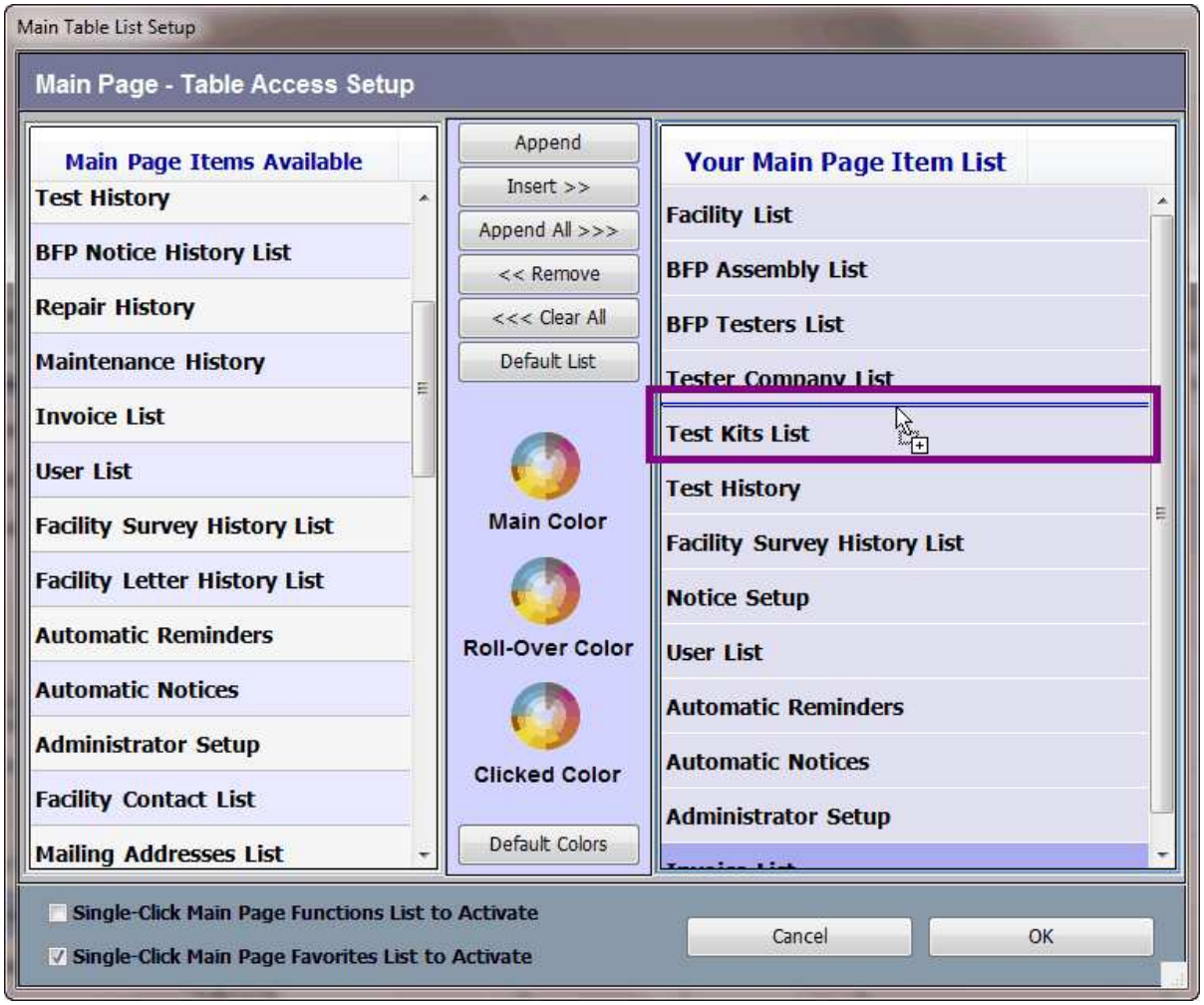


Notes:

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.

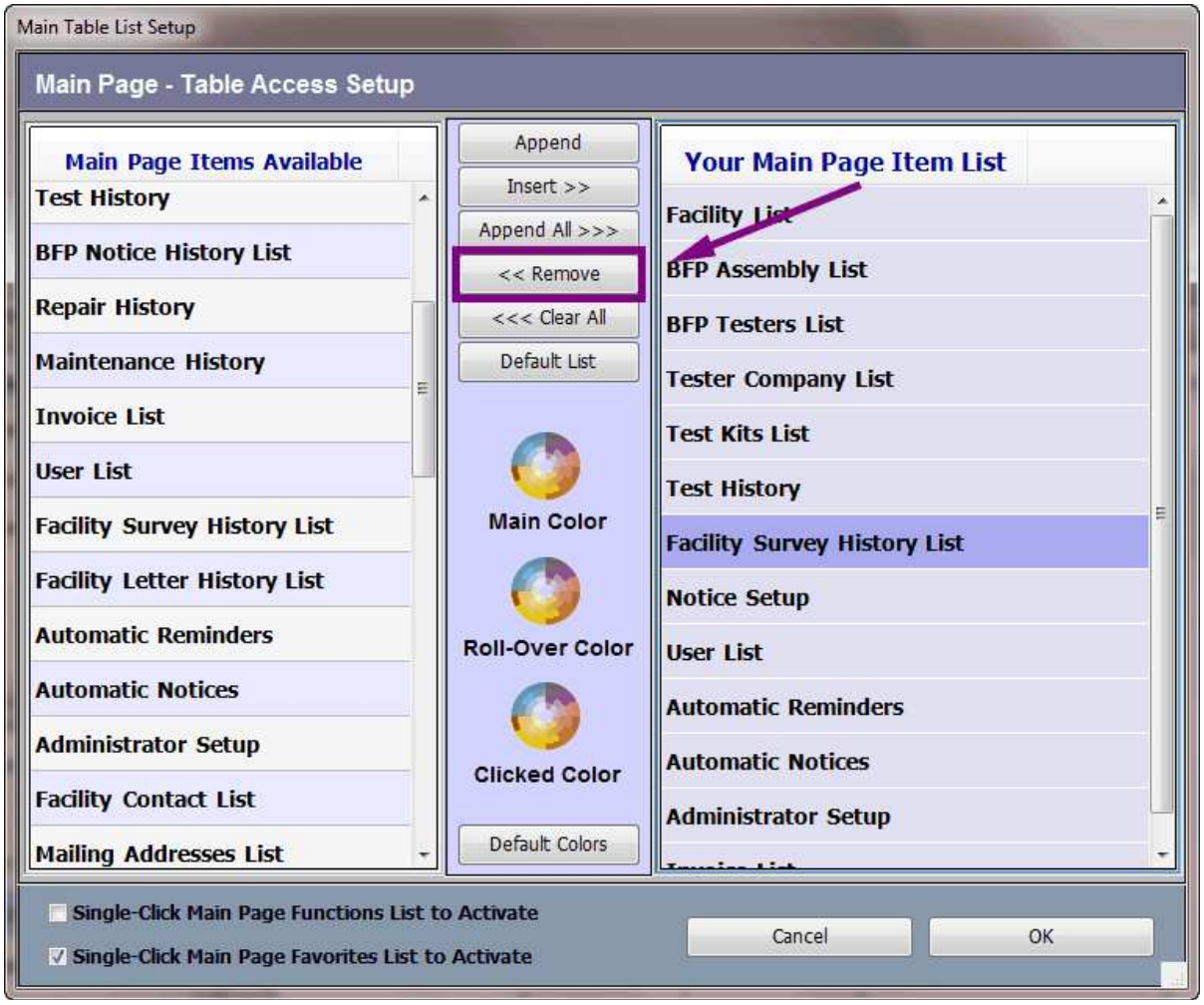


Notes:

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.



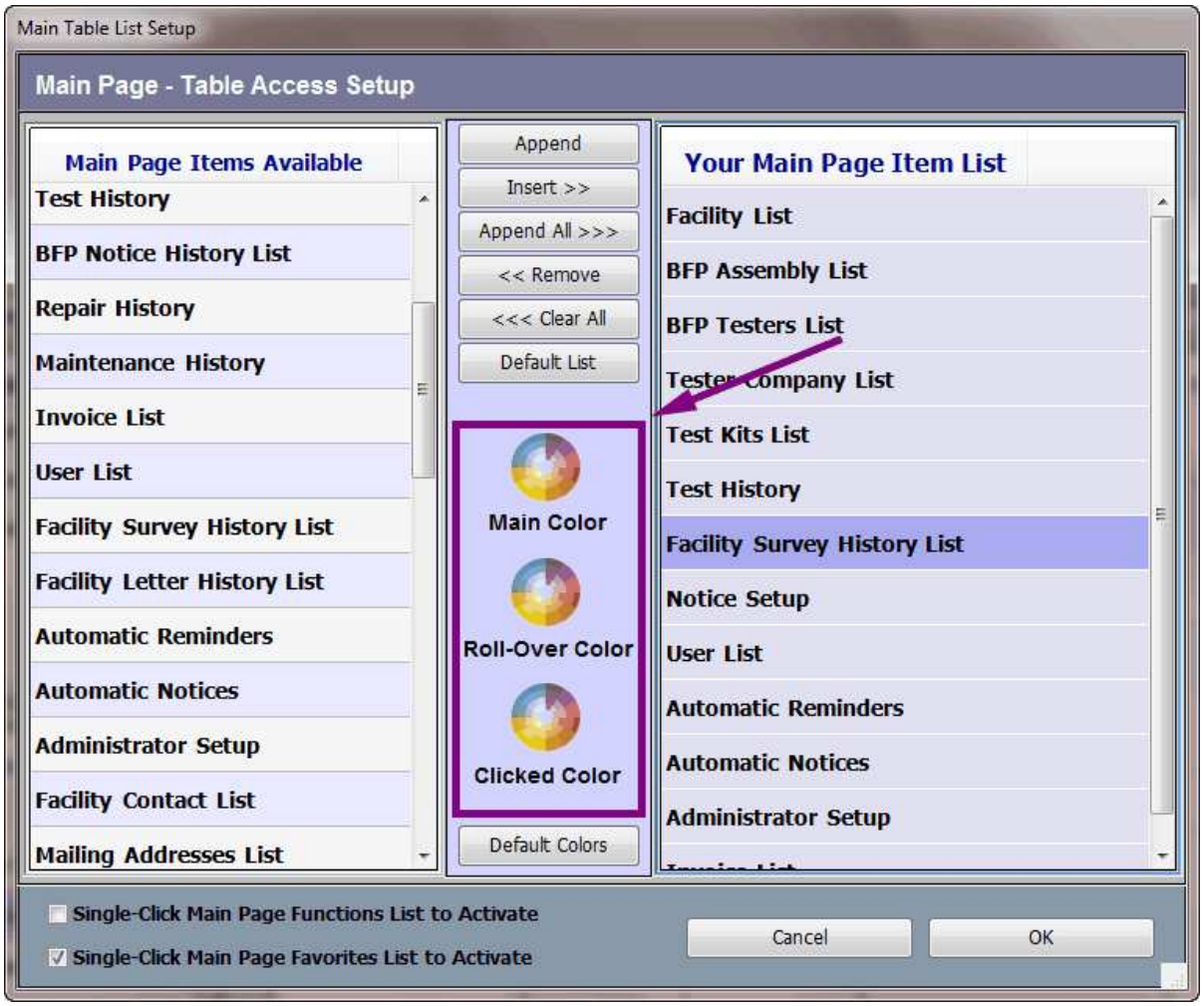
Notes:

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.

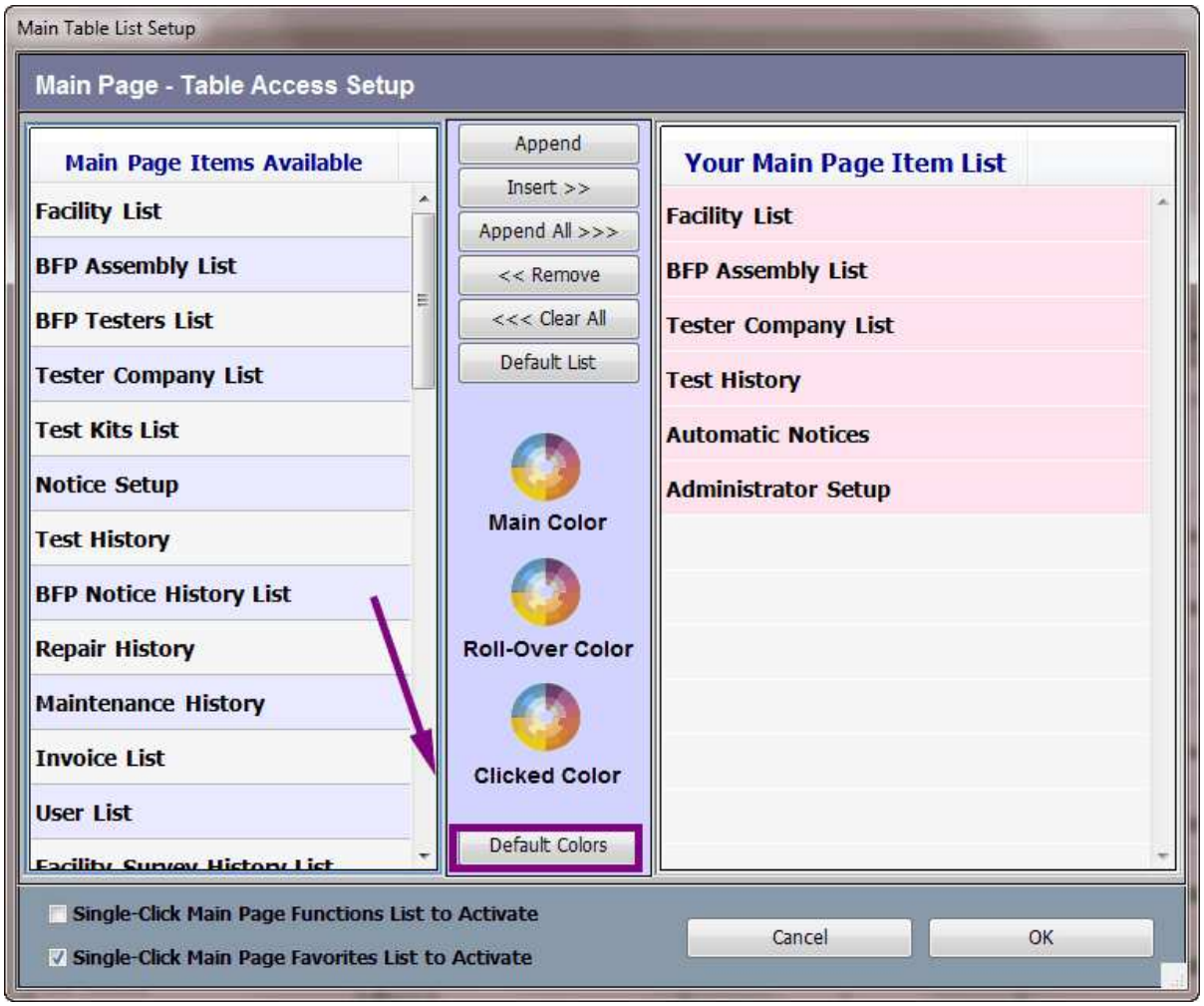
To change the color, click the color wheel located above the type of color you would like to change.



Notes:

How to Return Colors to Default (if desired)

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



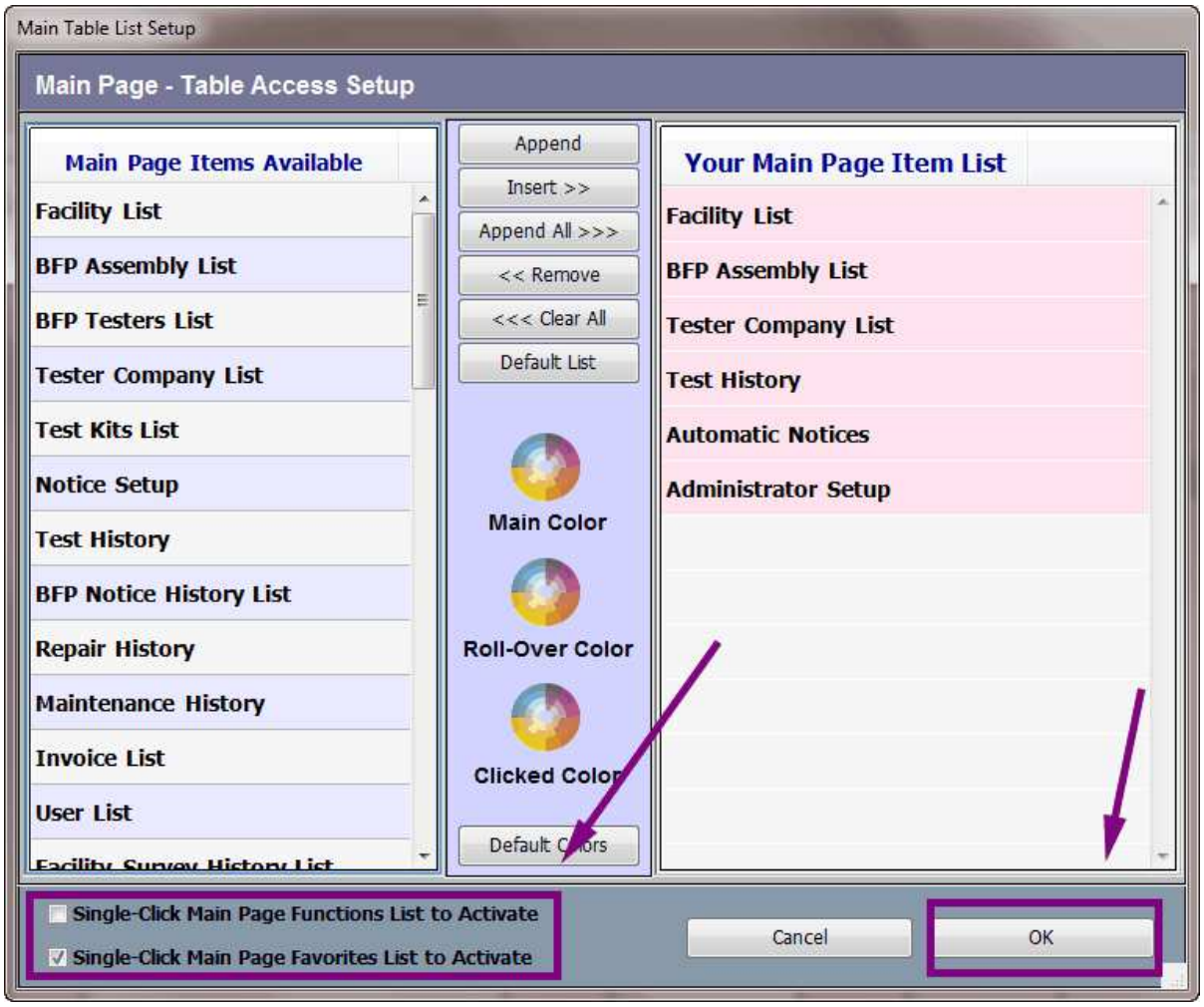
Notes:

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

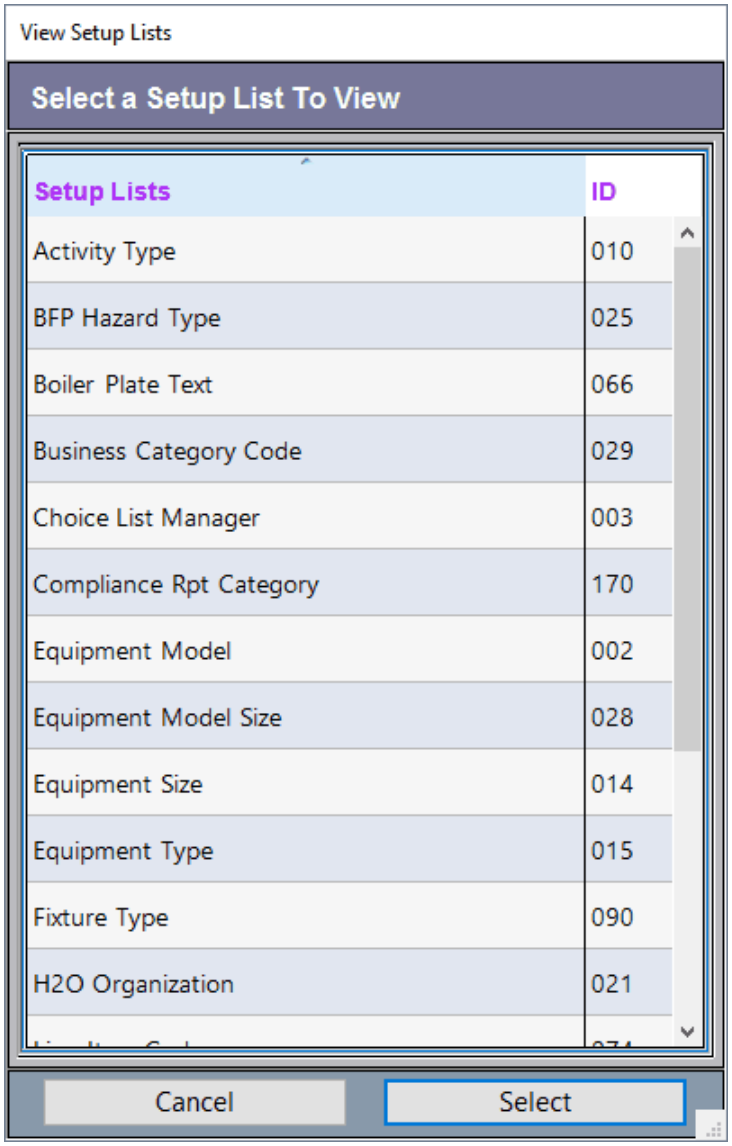
This Page Describes What the Lookup/Resource list is, and how to modify items in this area.

What is Lookup/Resources List?

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

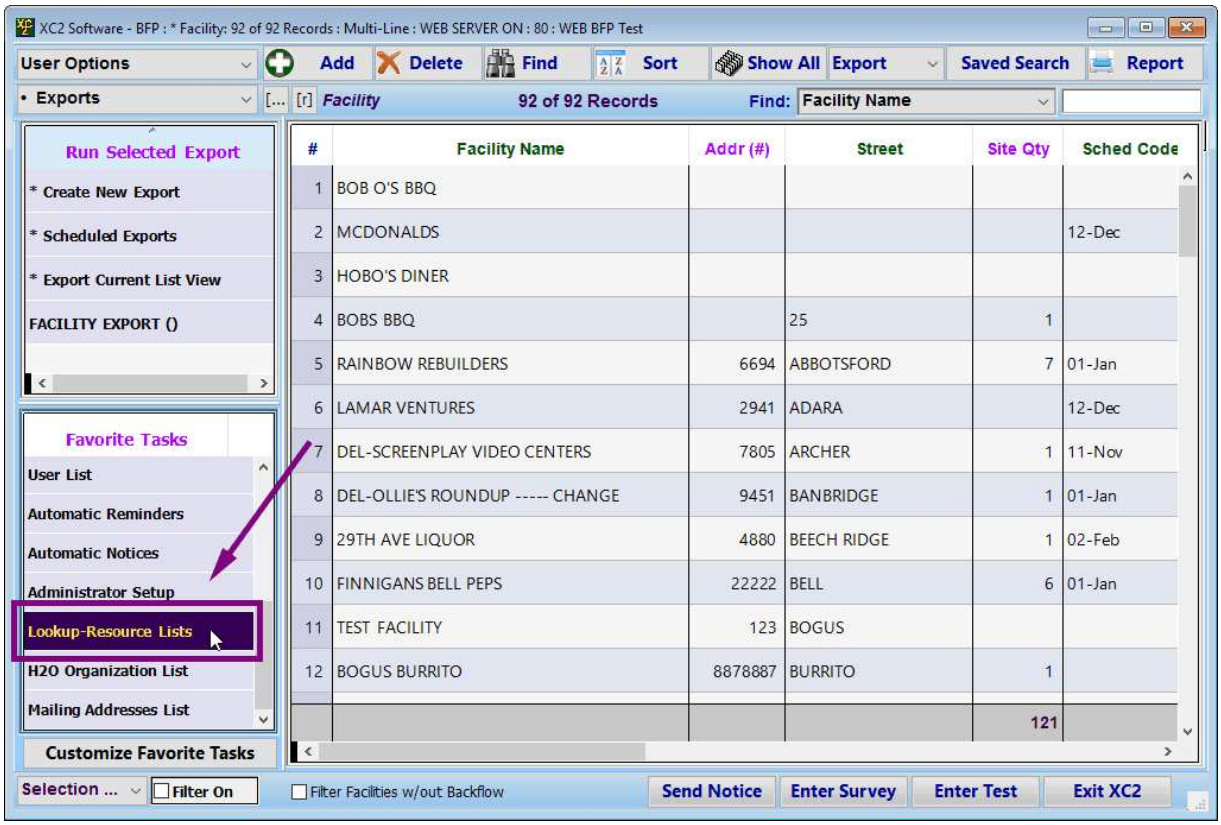
Items that can be customized in the lookup/resource area includes

1) Zip Codes
2) Equipment Types
3) H20 Organizations
4) Most Pulldown Menus
5) Hazard Types



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 demostrate an example of how to create a new zip code

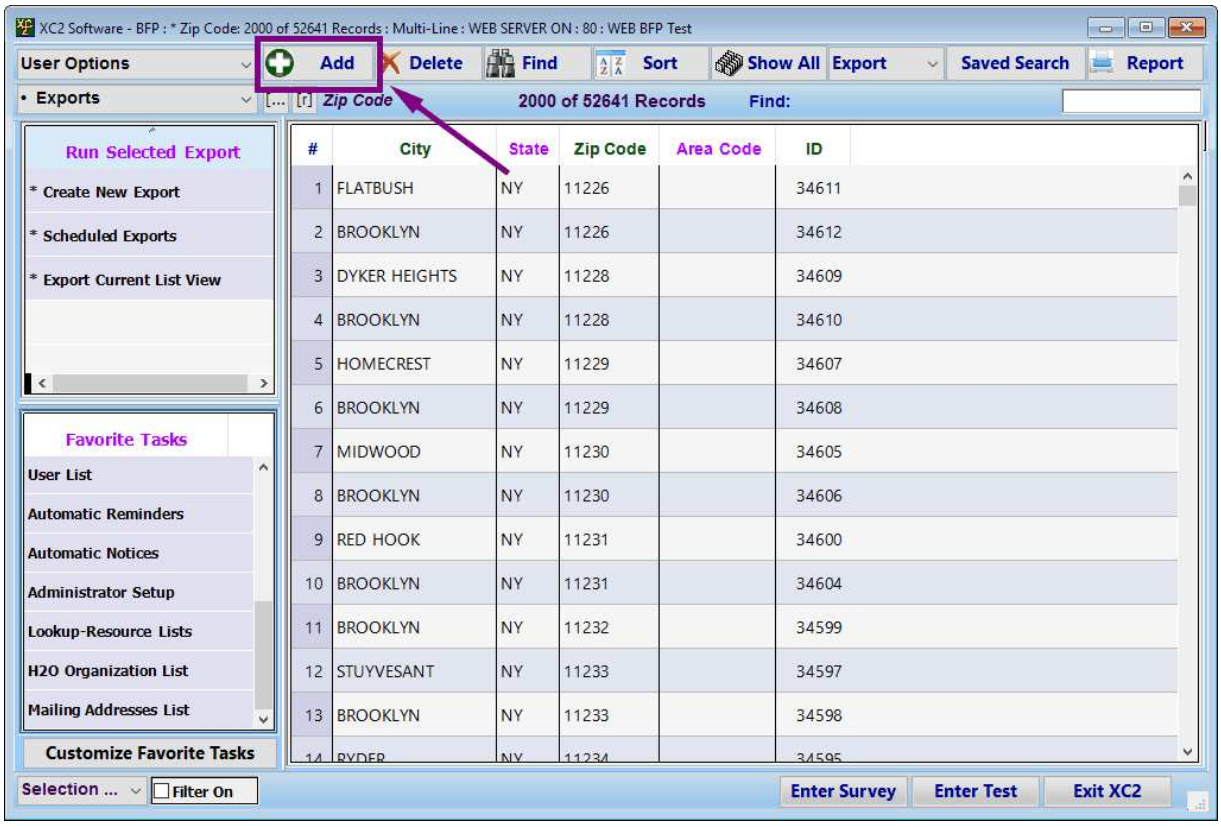
Create a new Zip Code record

Highligh Zip Code and click select

Notes:

Add New Zip Code Record

Click Add to create a new Zip Code Record

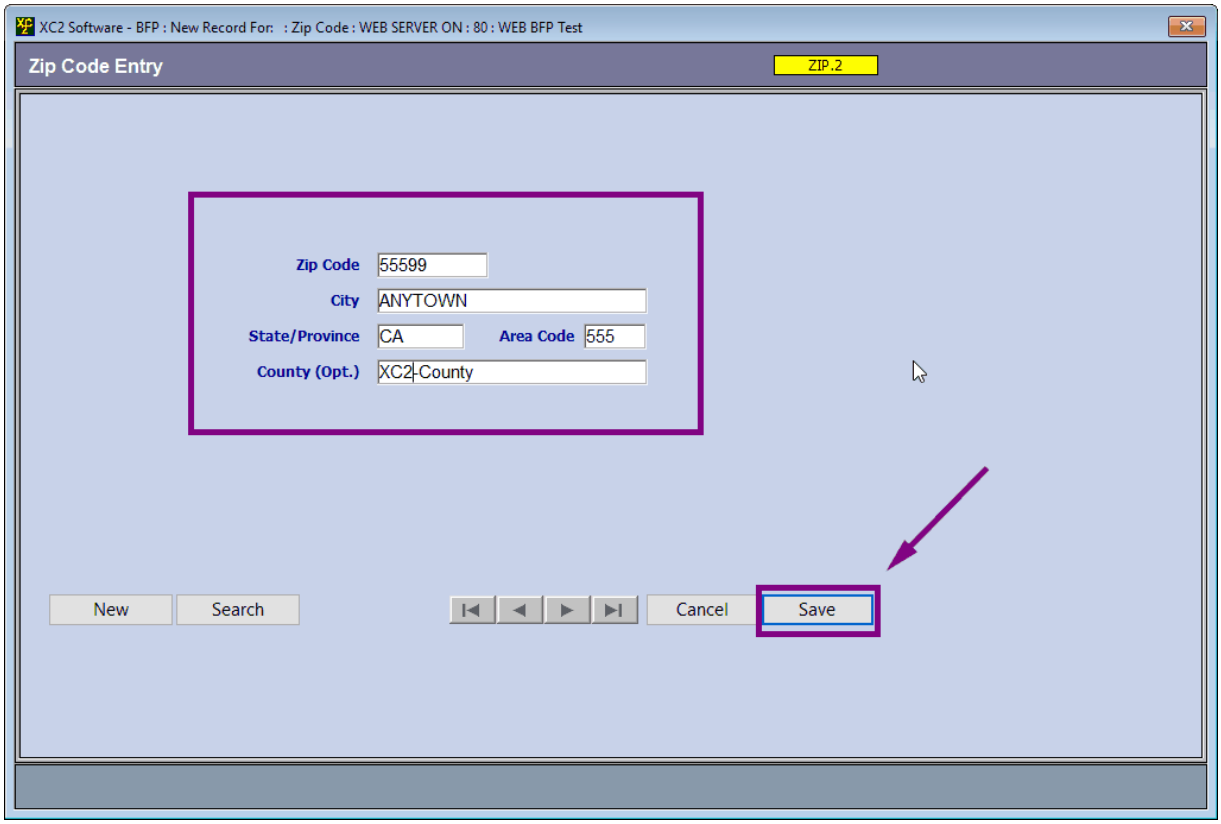


Notes:

Save You New Entry

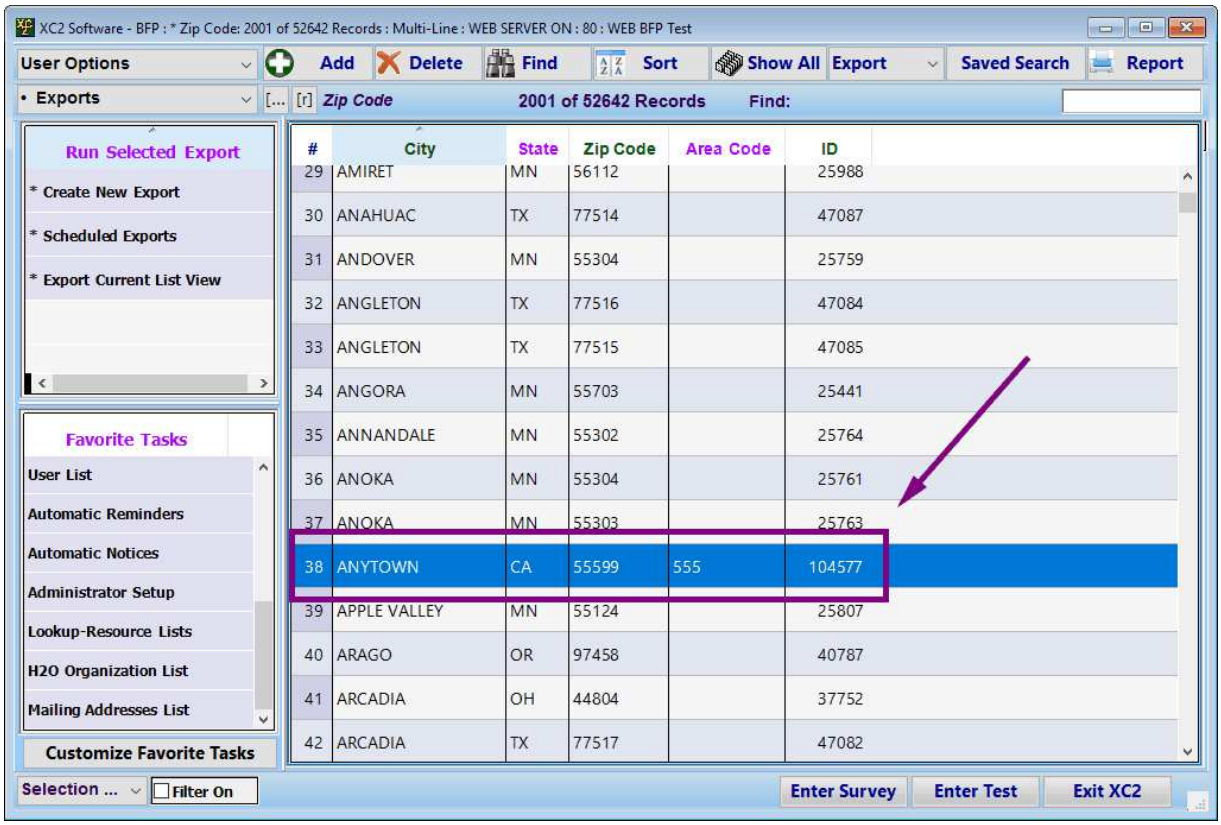
Enter

Zip Code
City
State
Area Code (optional)



Notes:

Zipcode will be Added



#	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

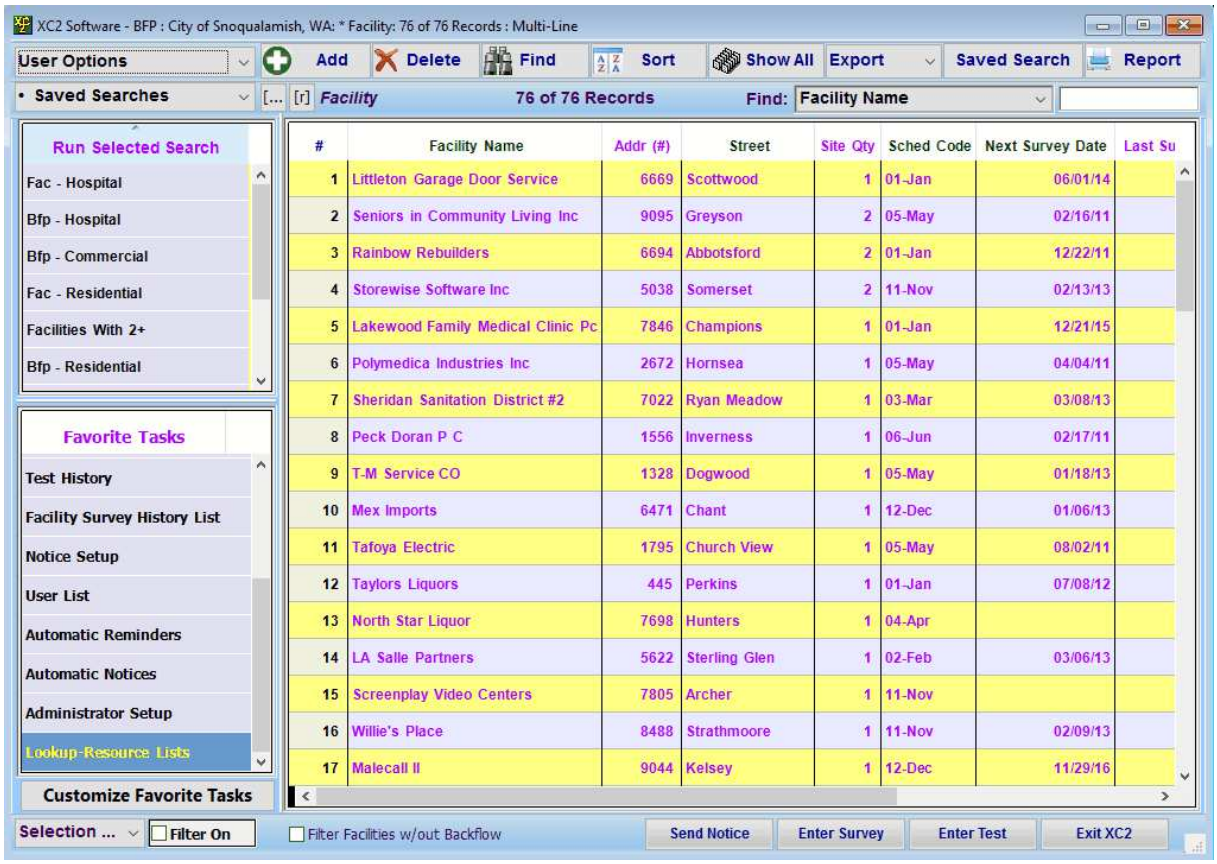
User Preferences: Colors, Themes and Font Size

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.

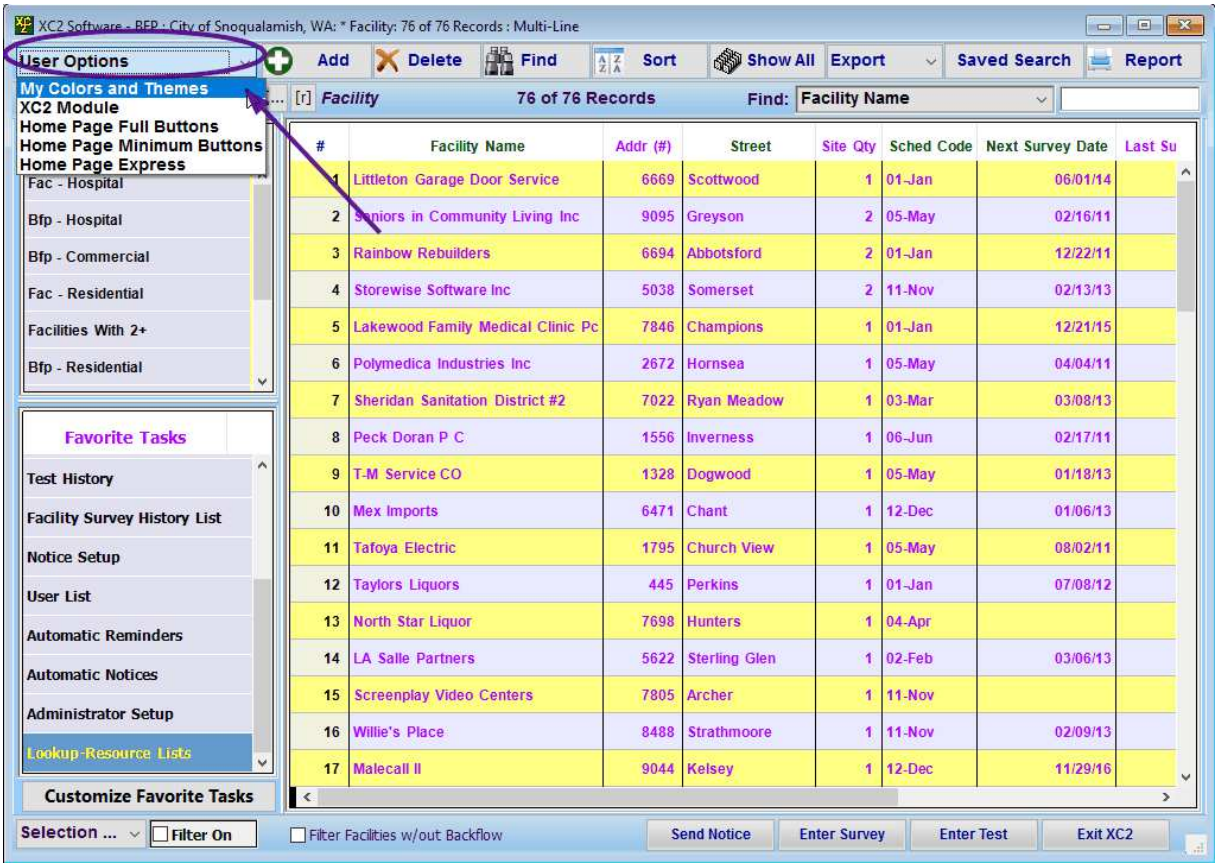


Notes:

Finding Colors and Themes

To Access Colors and Themes go to Users Options

Select My Color and Themes



#	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	Taylors 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:

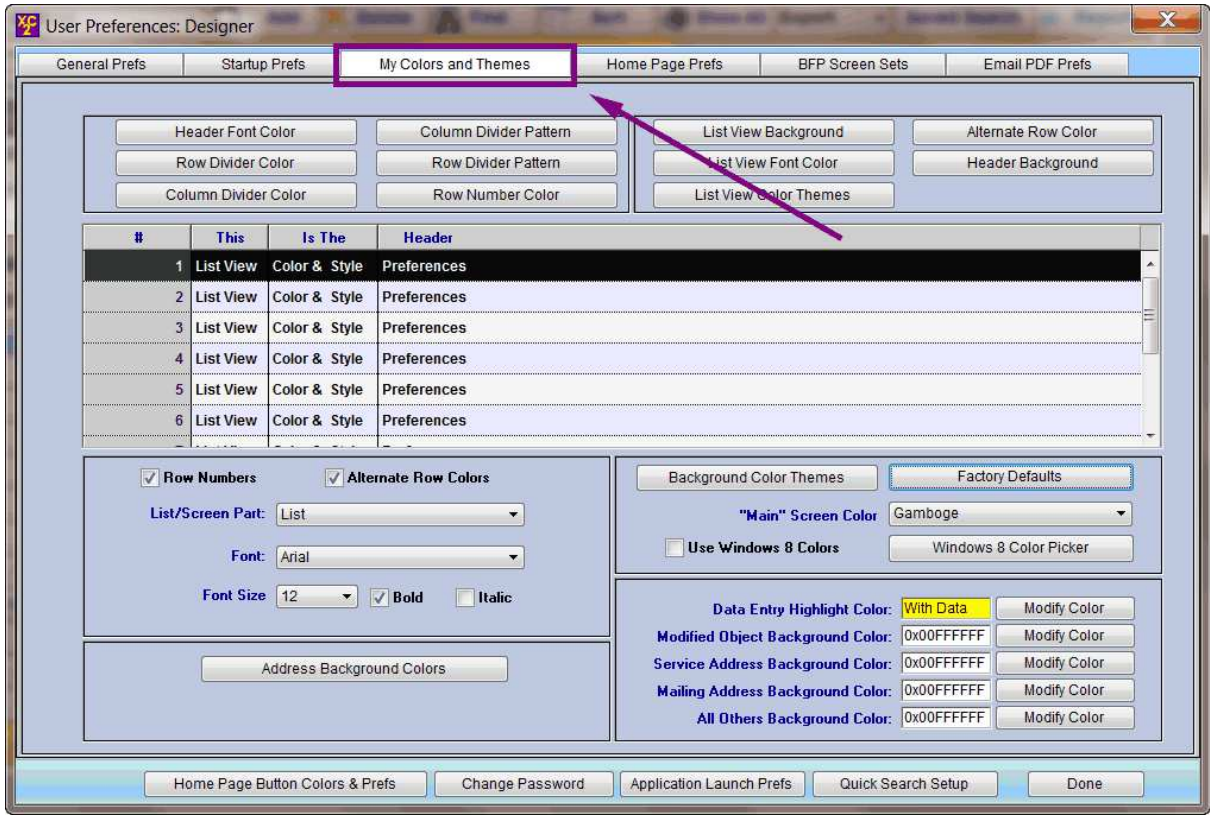
Colors and Themes Tab

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

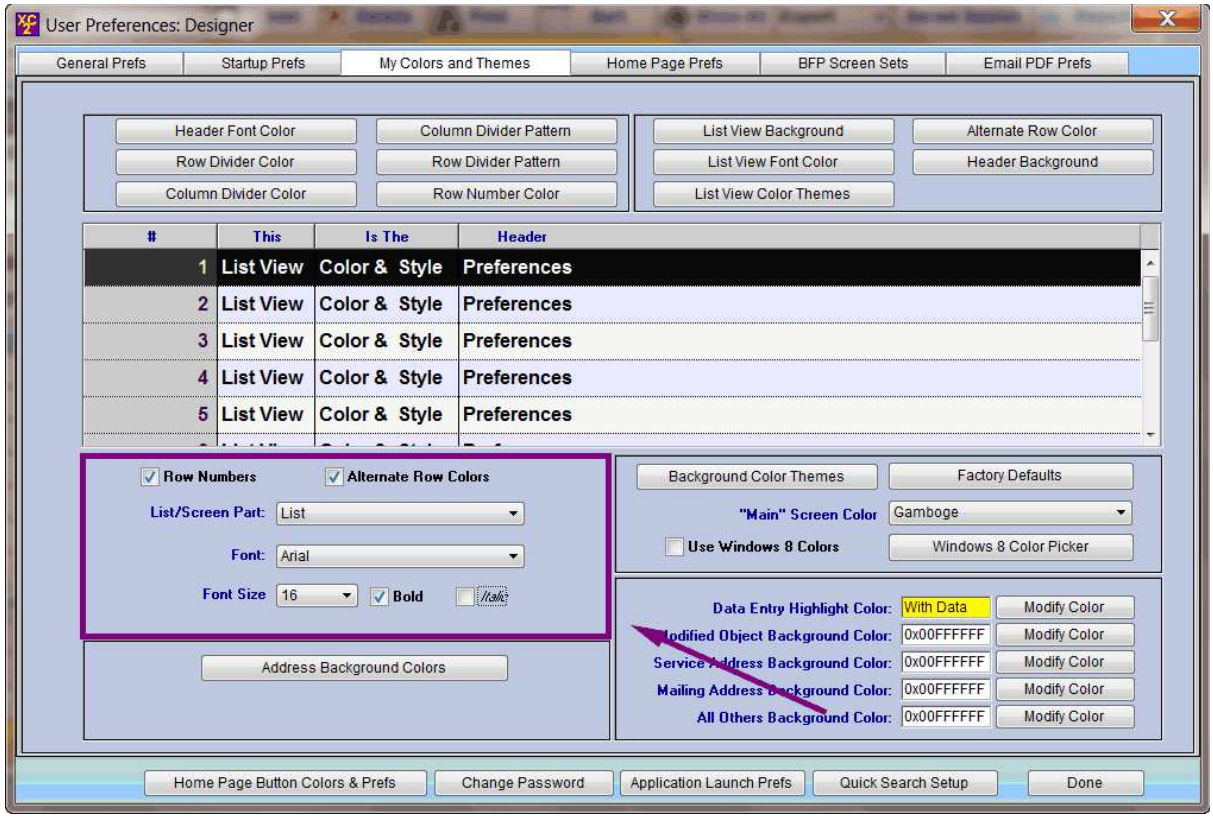


Notes:

Change Your Font Style or Size

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

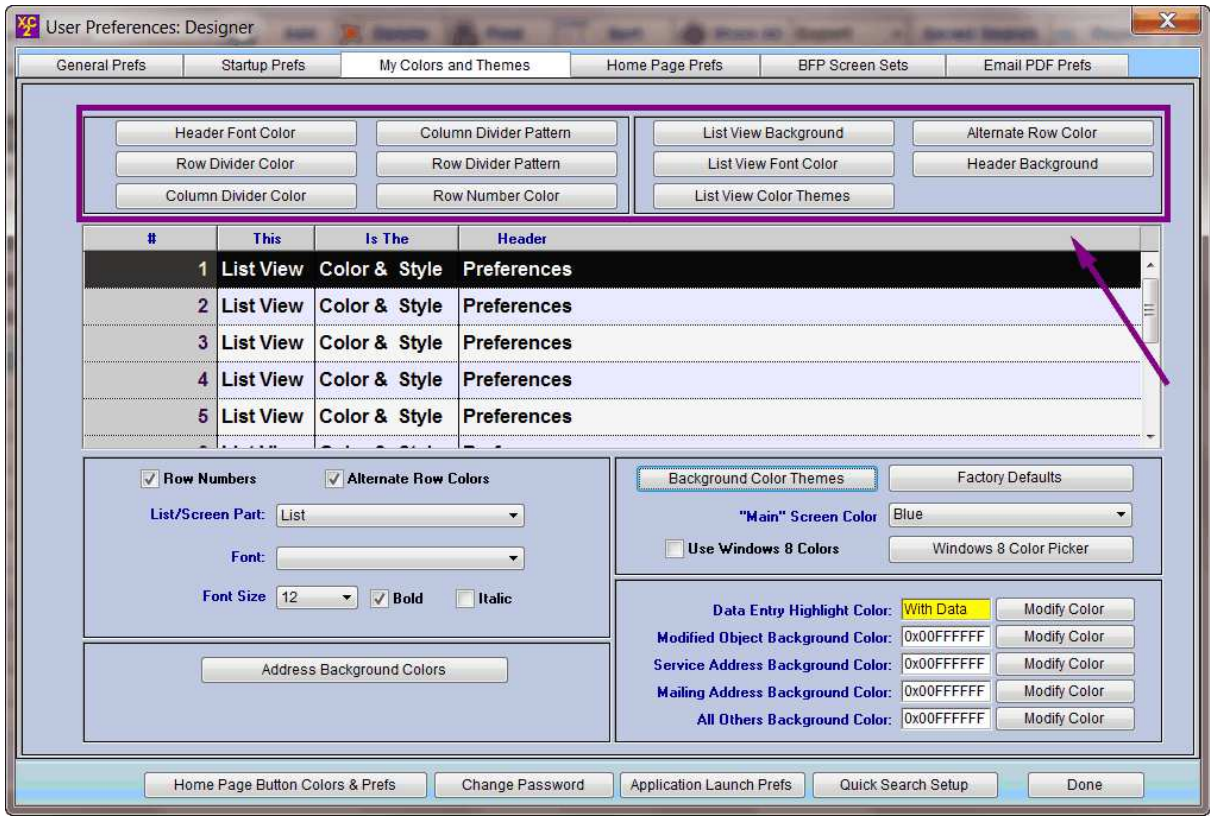
Here I made my Font Size Larger in the List View.



Notes:

Change Your List View Color Settings

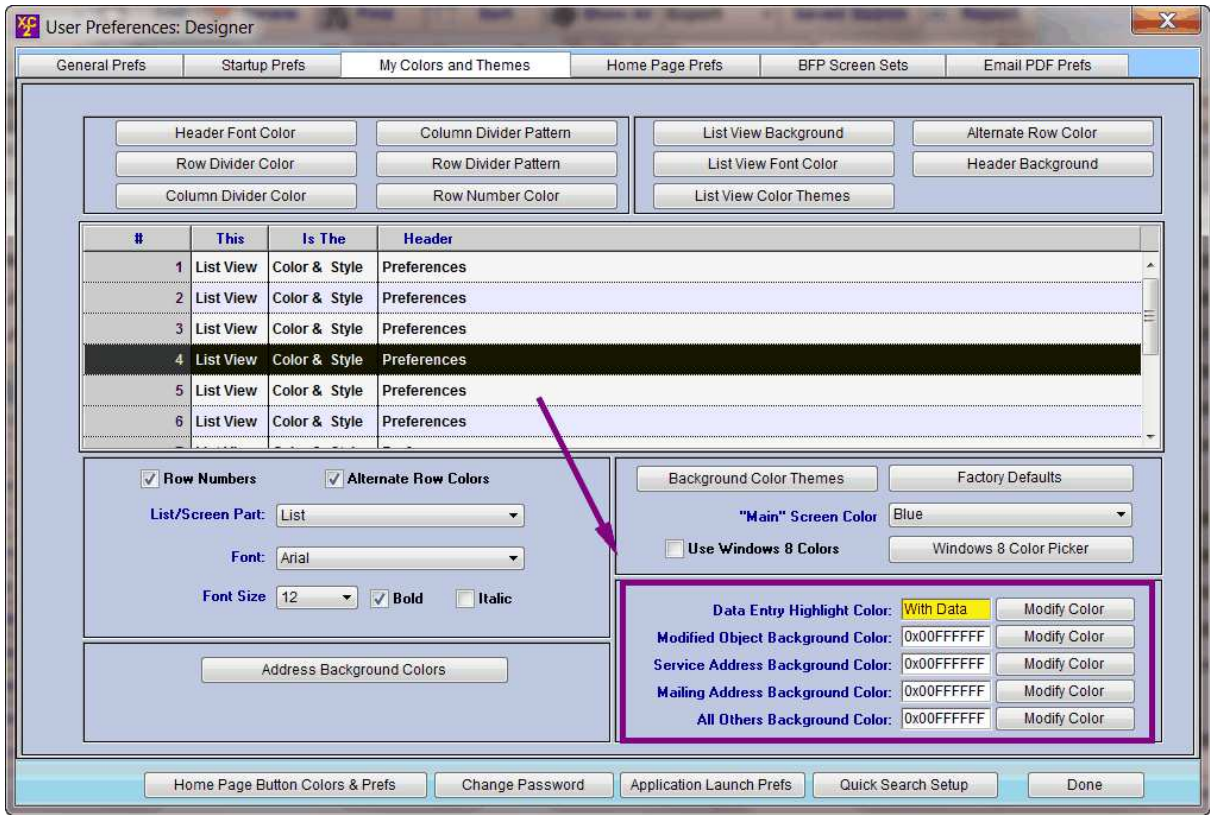
Change your List View Color settings by clicking on the buttons on the top portion of the screen



Notes:

Change Background Color

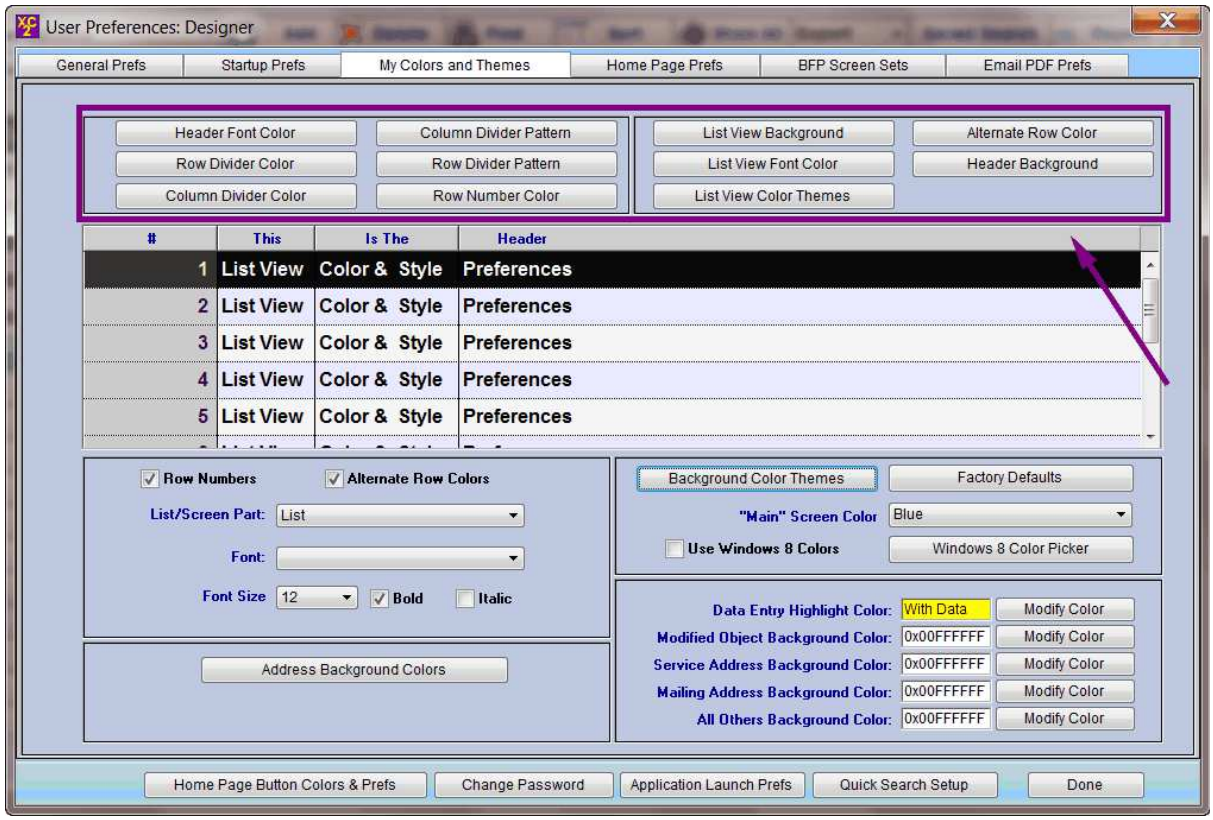
Choose different background colors in the lower right corner



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.

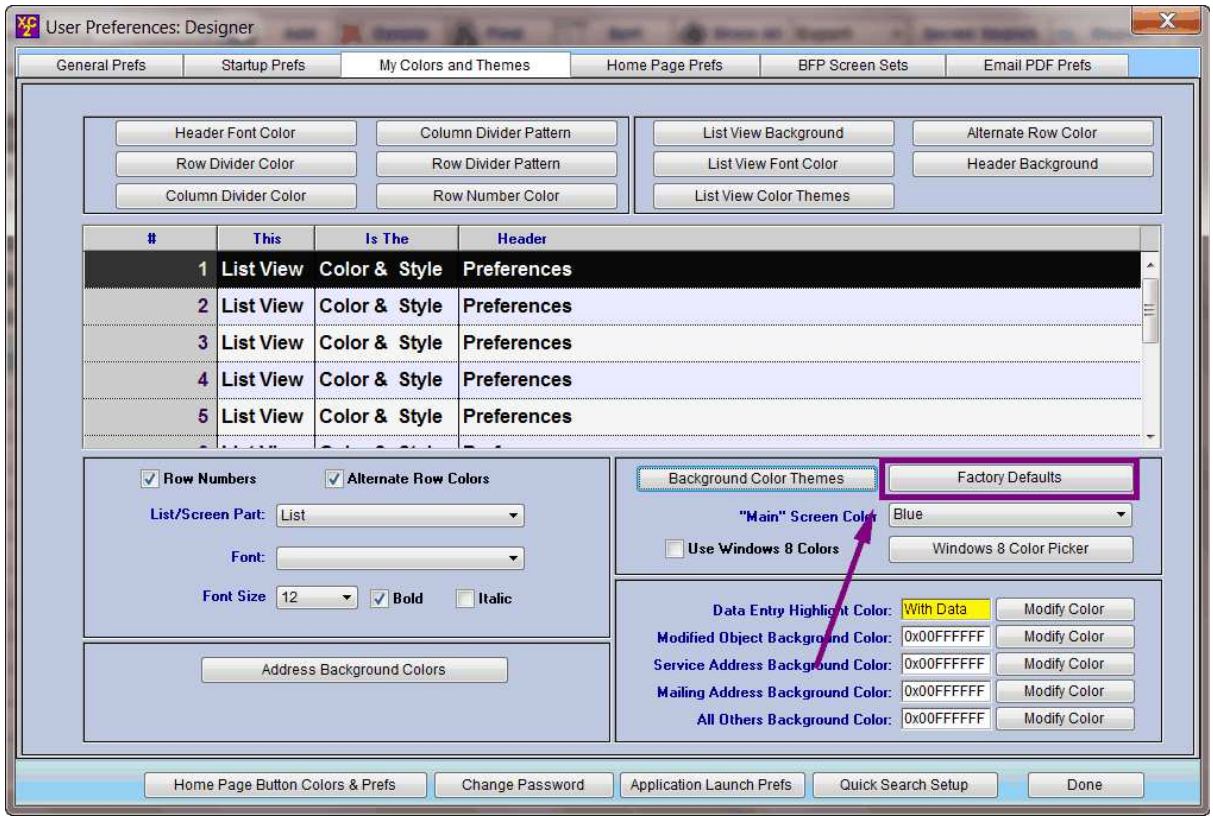


Notes:

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

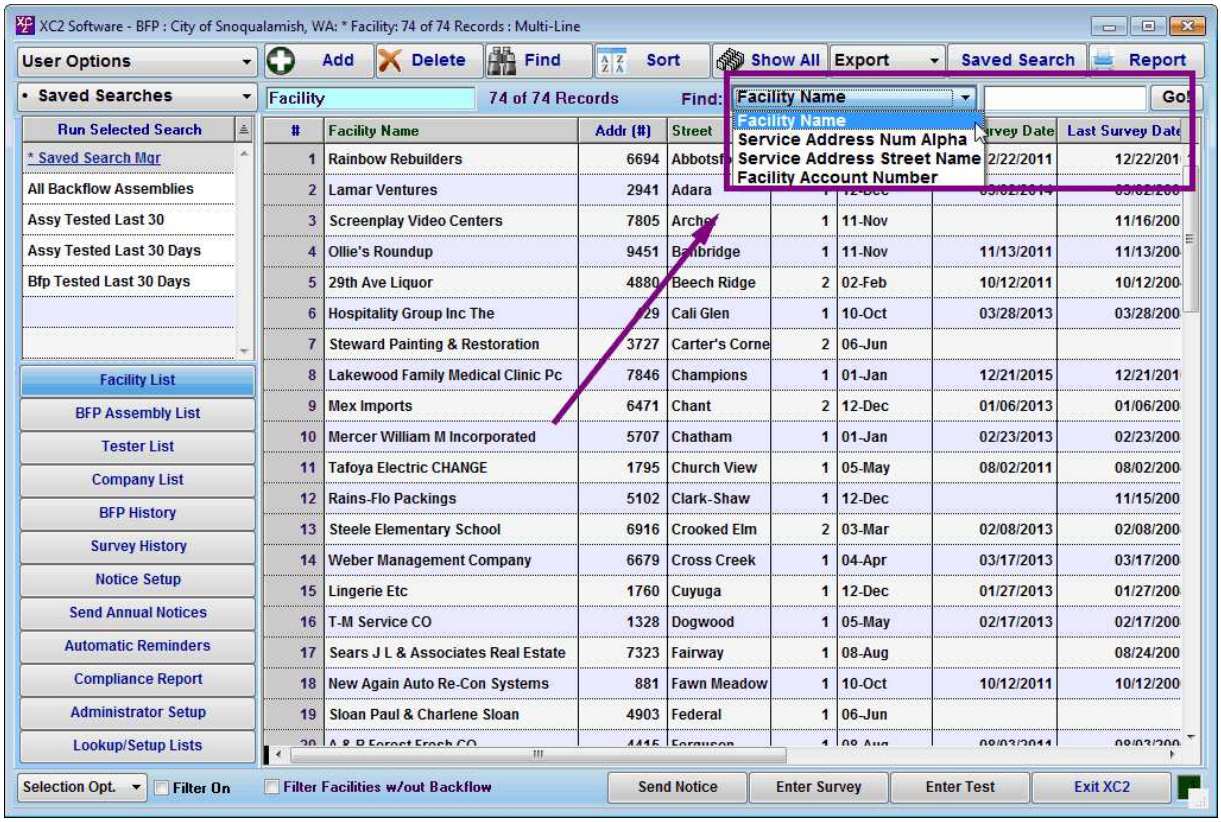
XC2's EZ Search can be customized so the most-used search parameters can be quickly selected.

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.



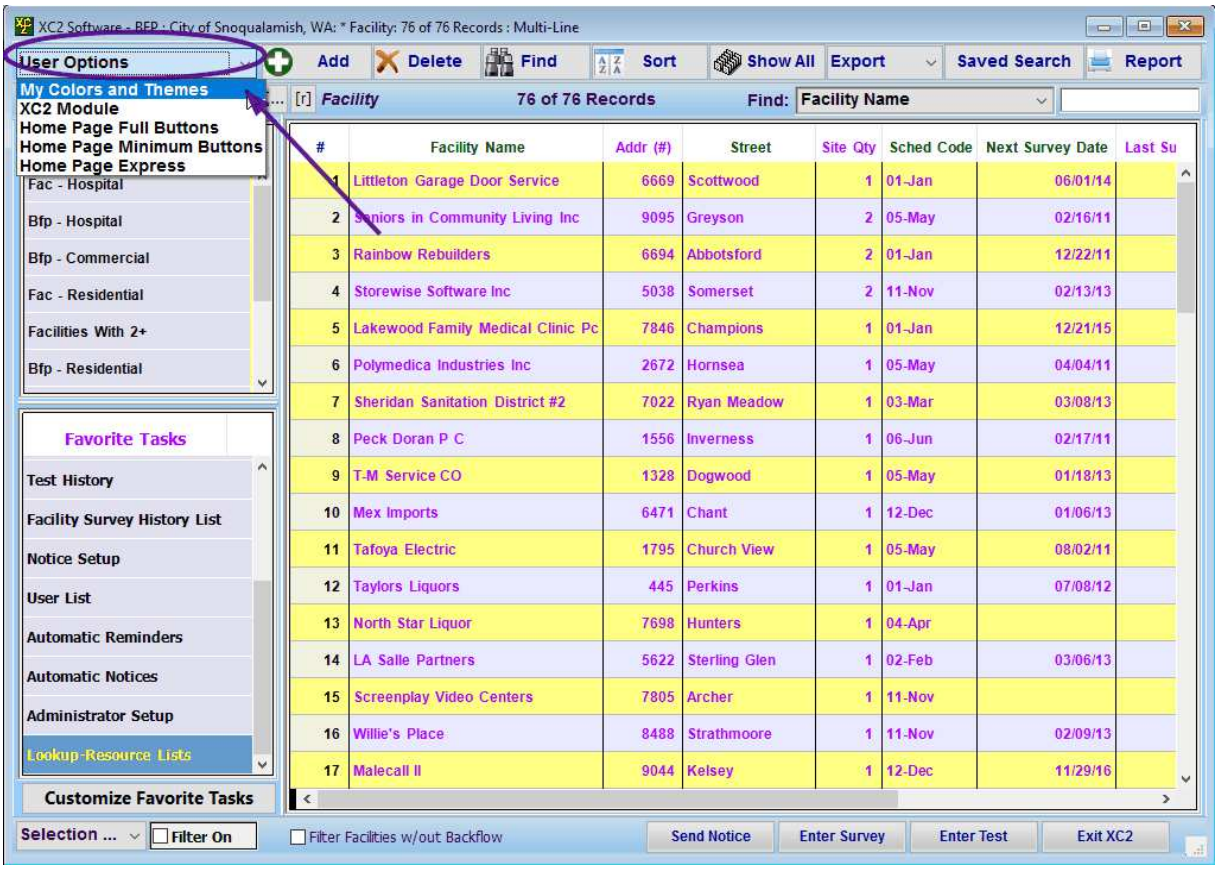
Notes:

User Preferences

To customize XC2's EZ Search

Go to Users Options

My Colors and Themes



Notes:

Select Quick Search Setup

Under General Preferences

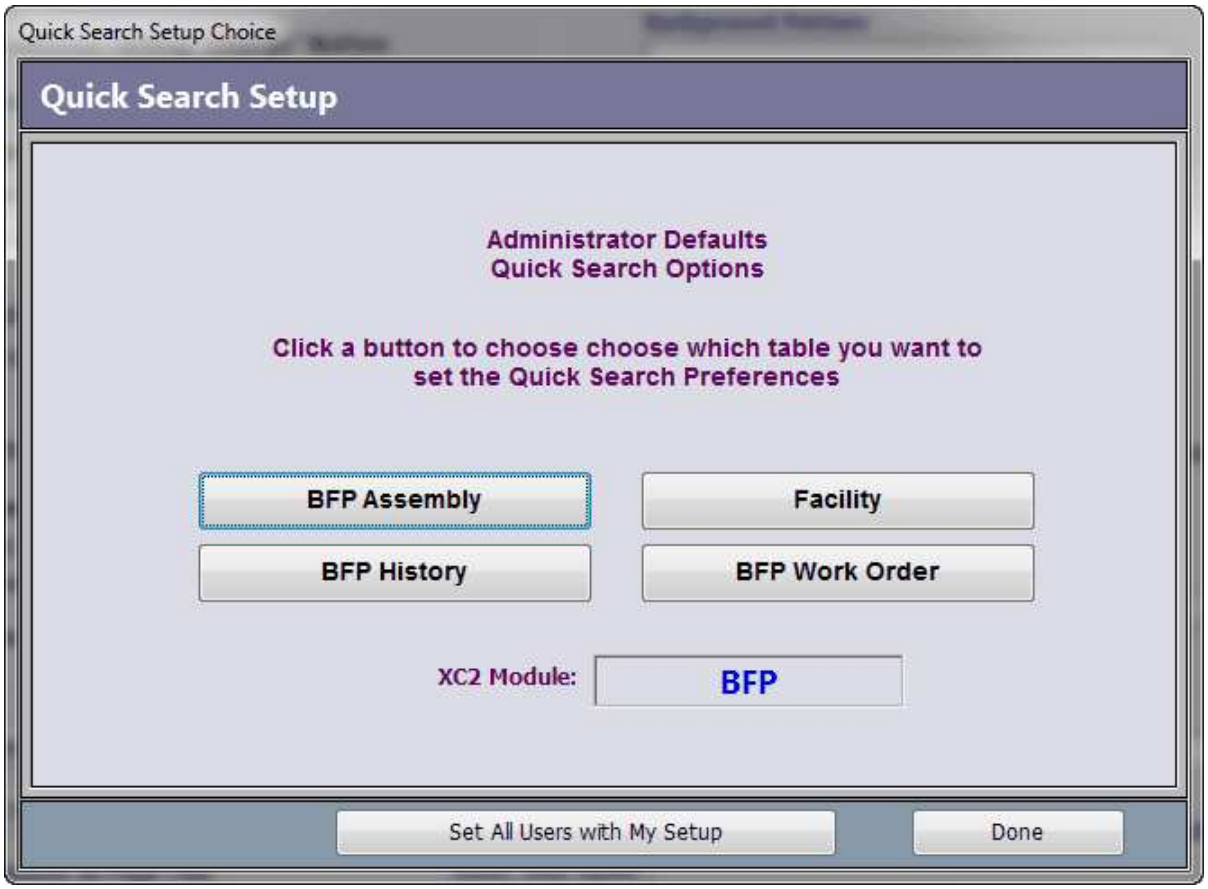
Select Quick Search Setup

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

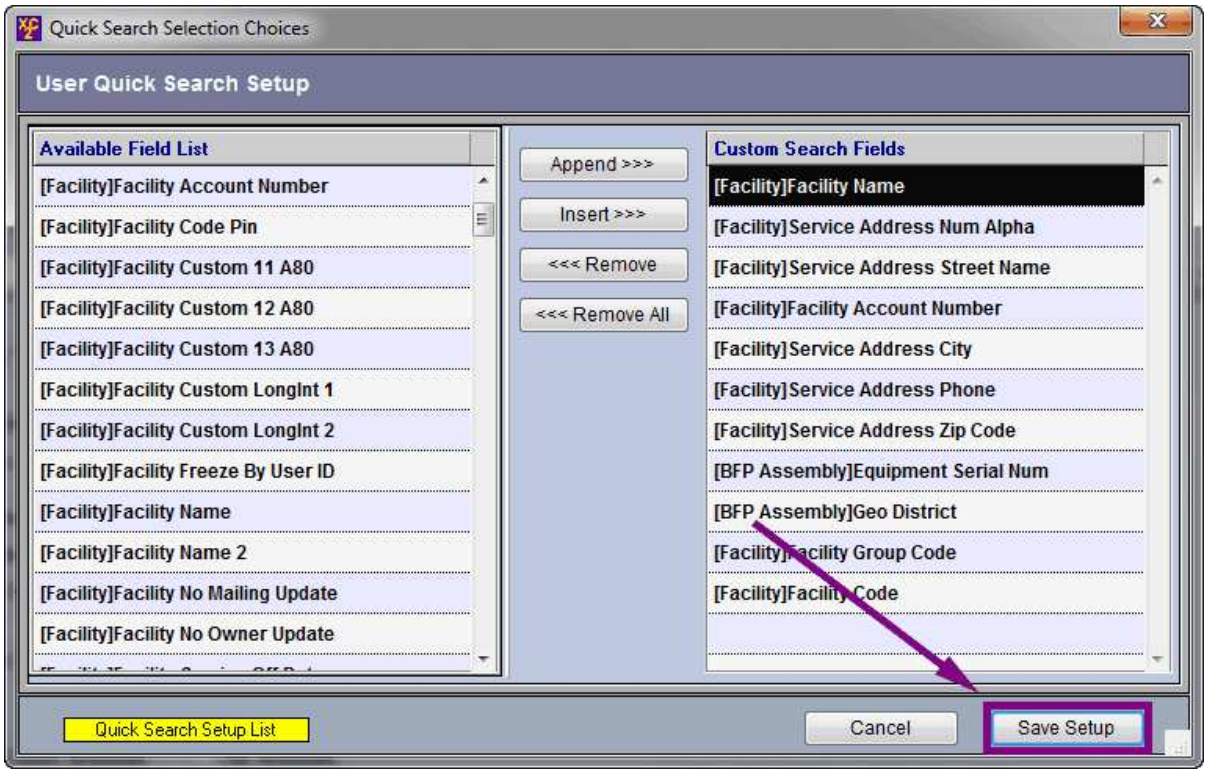
To add a Field: Highlight the field on the left, then click Insert

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



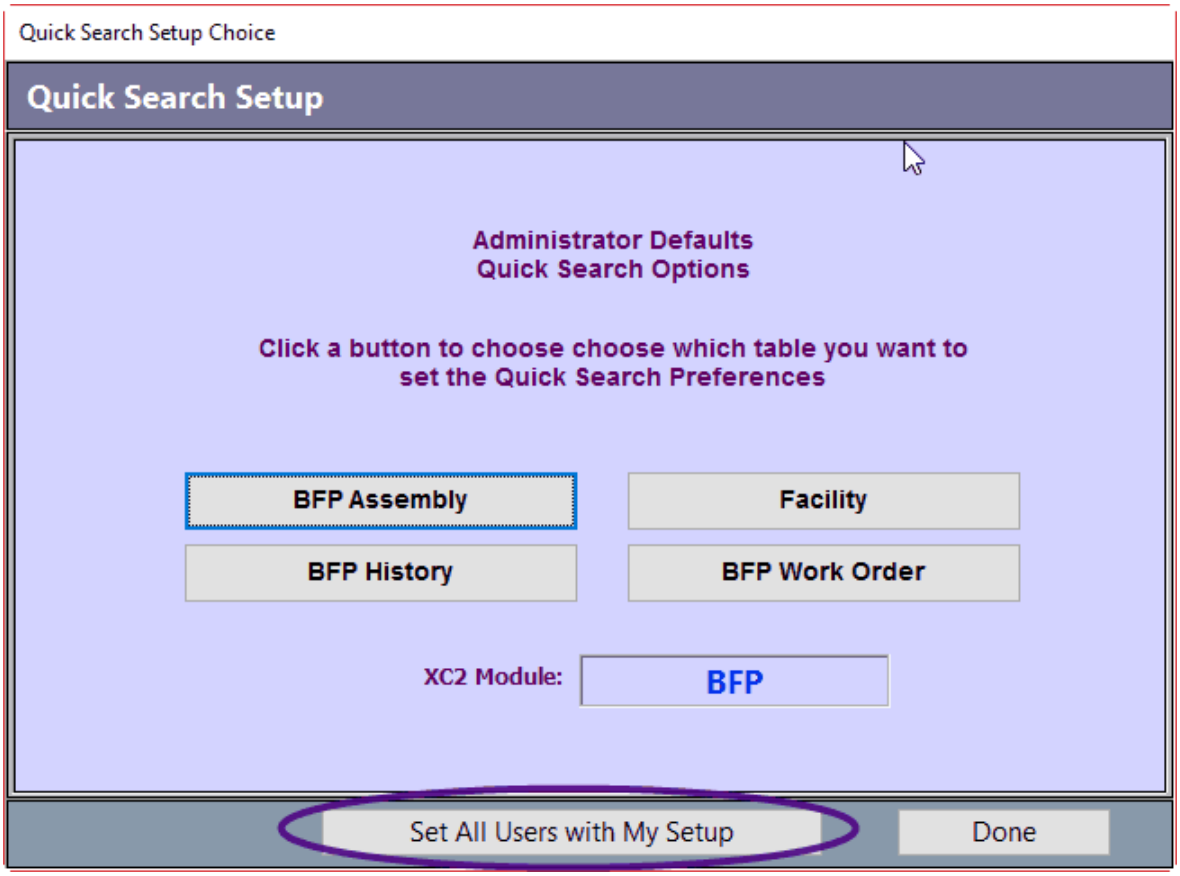
Notes:

Change other Search Lists if Needed

You will be brought back to the Search Setup Screen

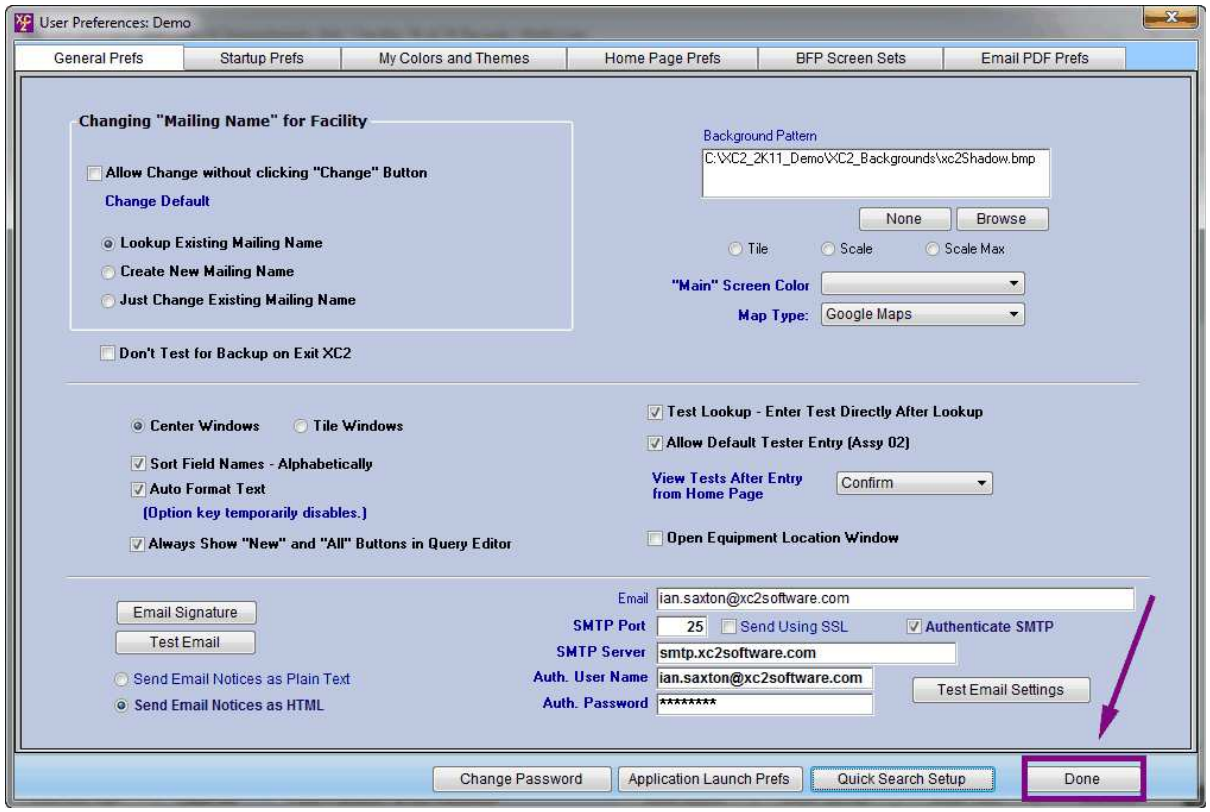
NOTE: If you would like to set ALL users to use the same search setup, click
• Set All Users With My Setup

Click Done when complete



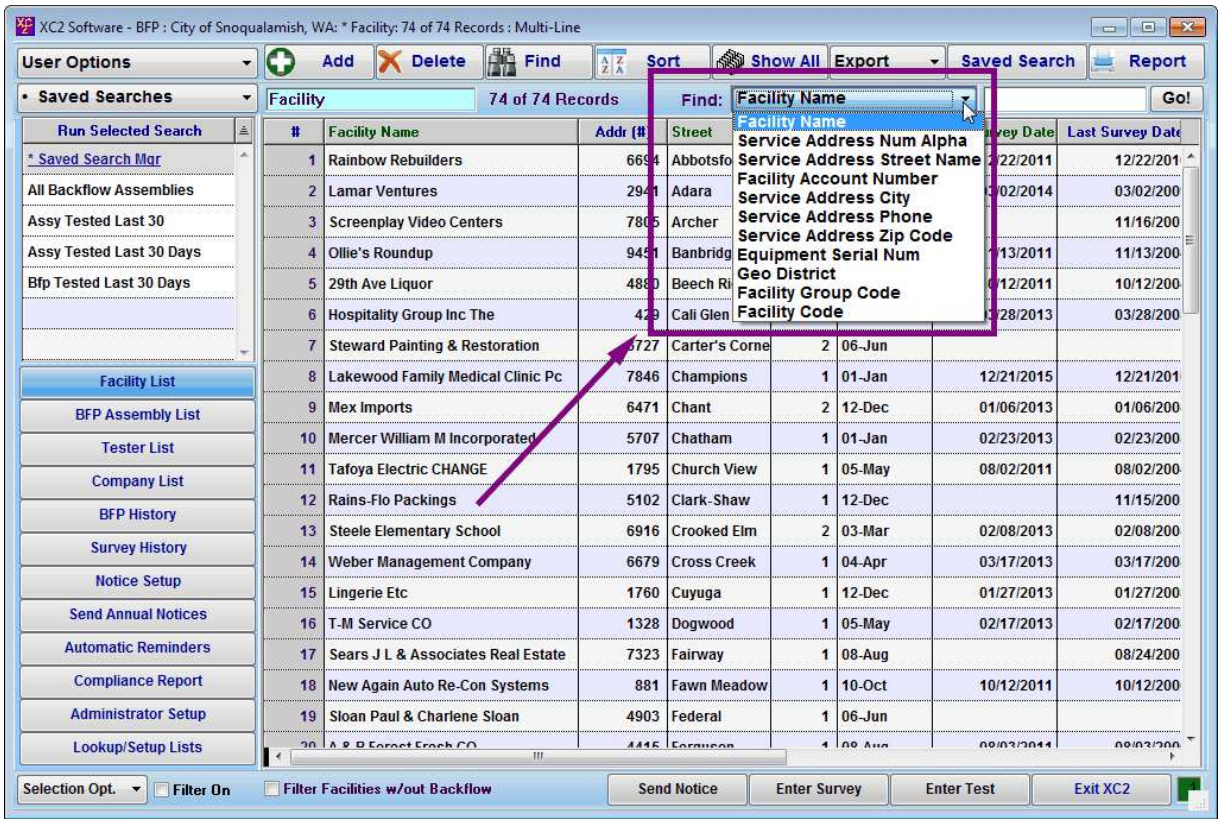
Notes:

Click Done to Close User Prefs



Notes:

New Quick Search Setup Items



Notes:

XC2 Software Knowledge Base

How To Change Login Passwords

KB Asset ID: 2108

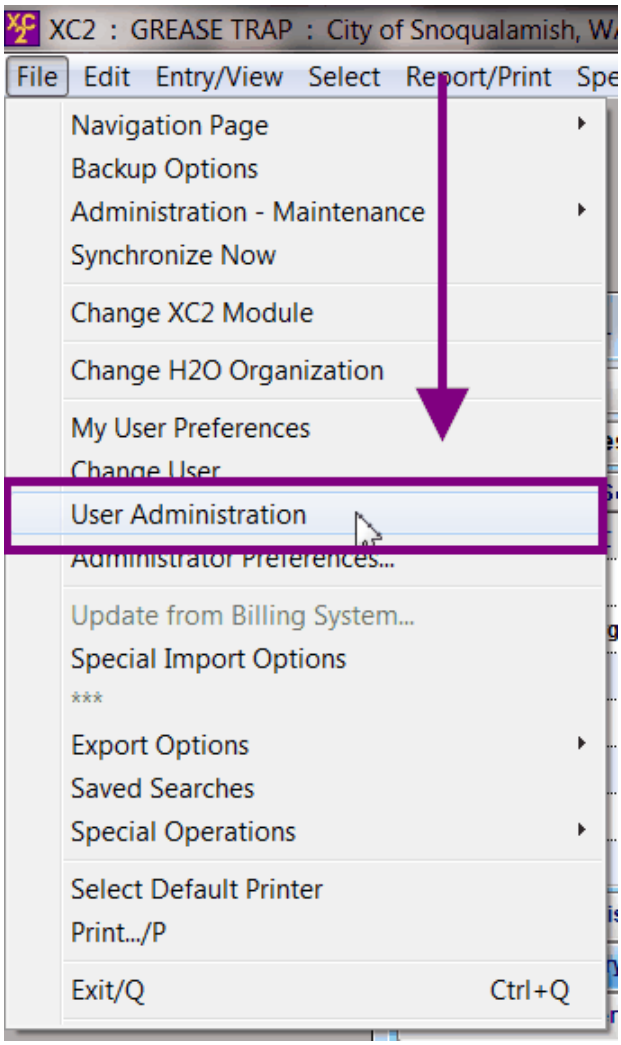
Page describes how to change a user login passwords in XC2

User Administration

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

Go up to the File Menu

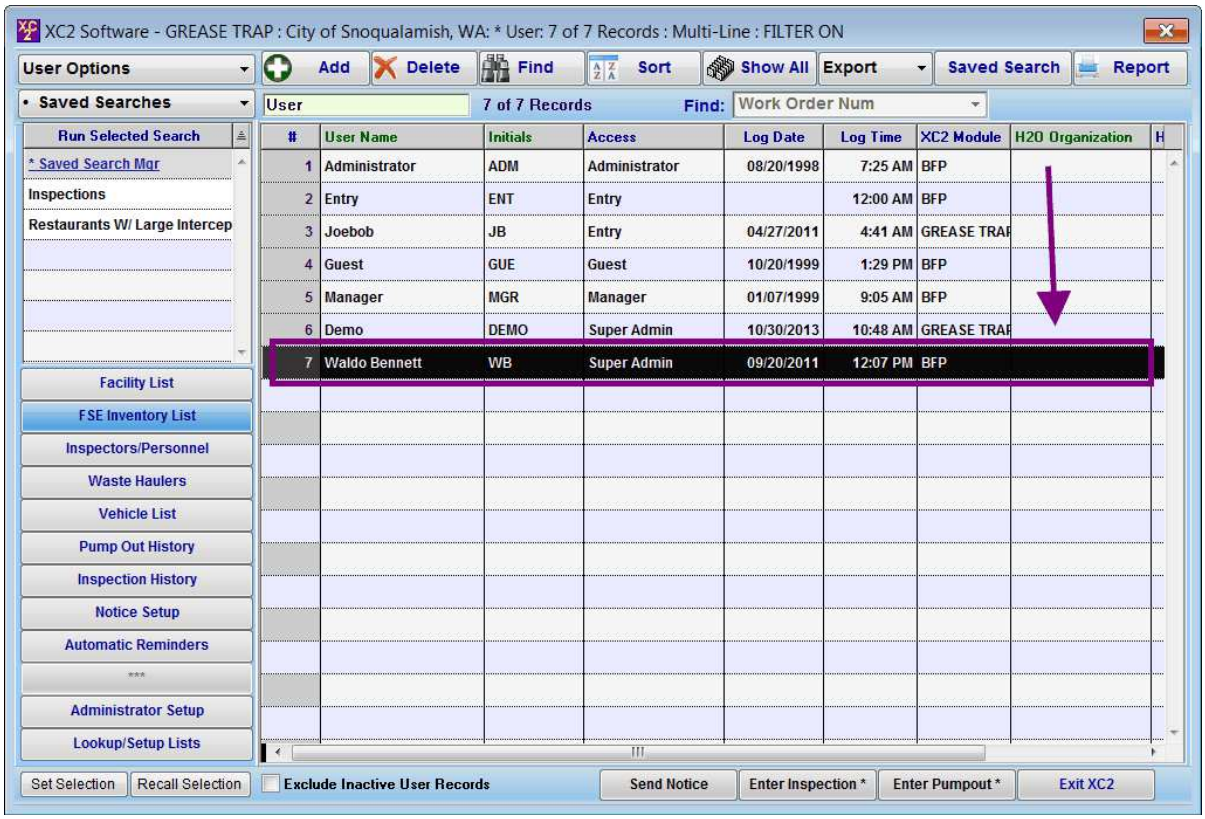
Select User Administration



Notes:

Select User Account

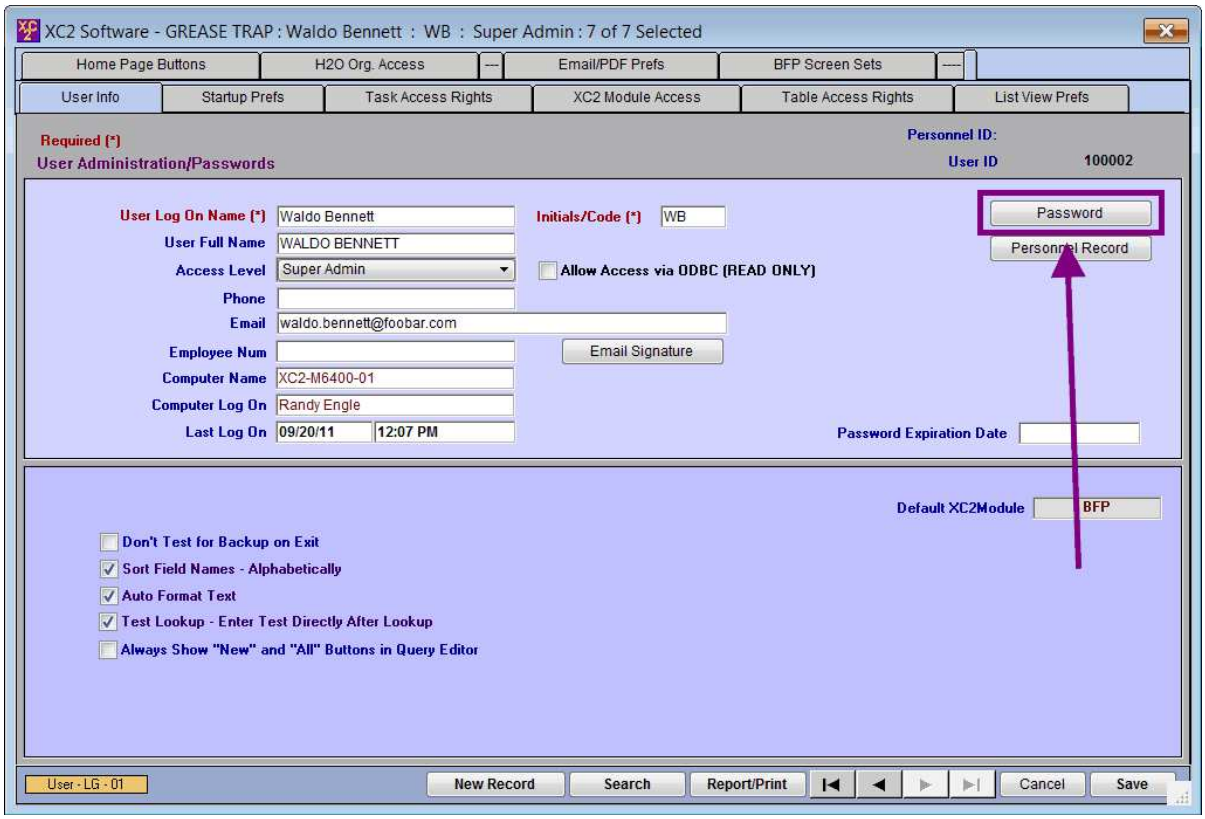
Select the user login account you wish to add or change the password for.



Notes:

Click Password

Click Password



Notes:

Change your password

Change your Password and click OK

Notes:

XC2 Software Knowledge Base

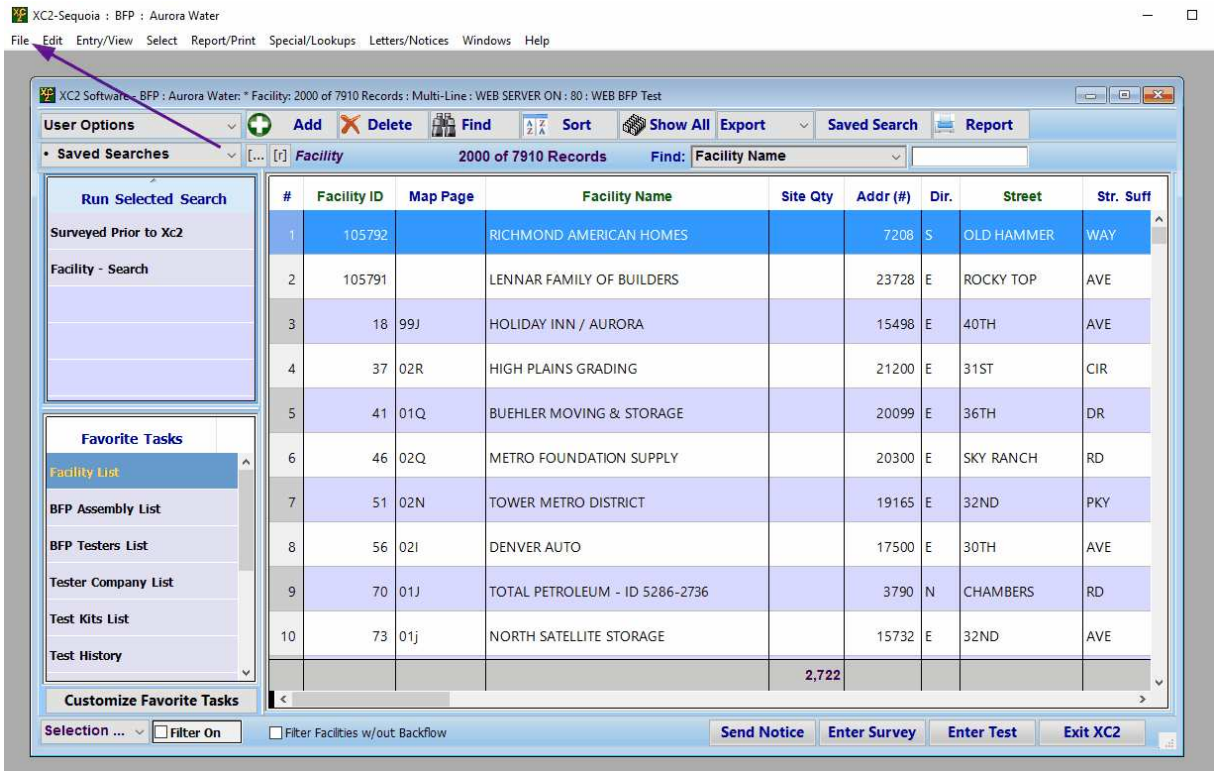
How To Change Your Own Password

KB Asset ID: 3629

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

Login Password

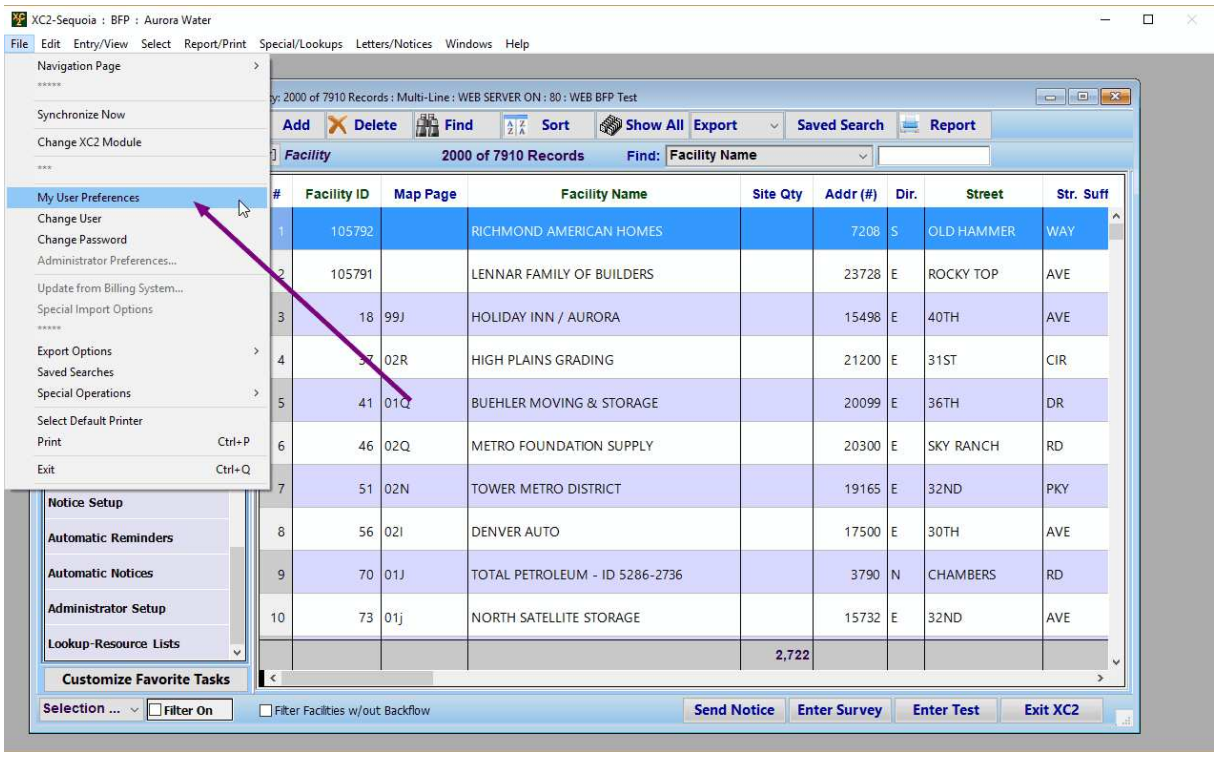
Click the File Menu



Notes:

Open User Preferences

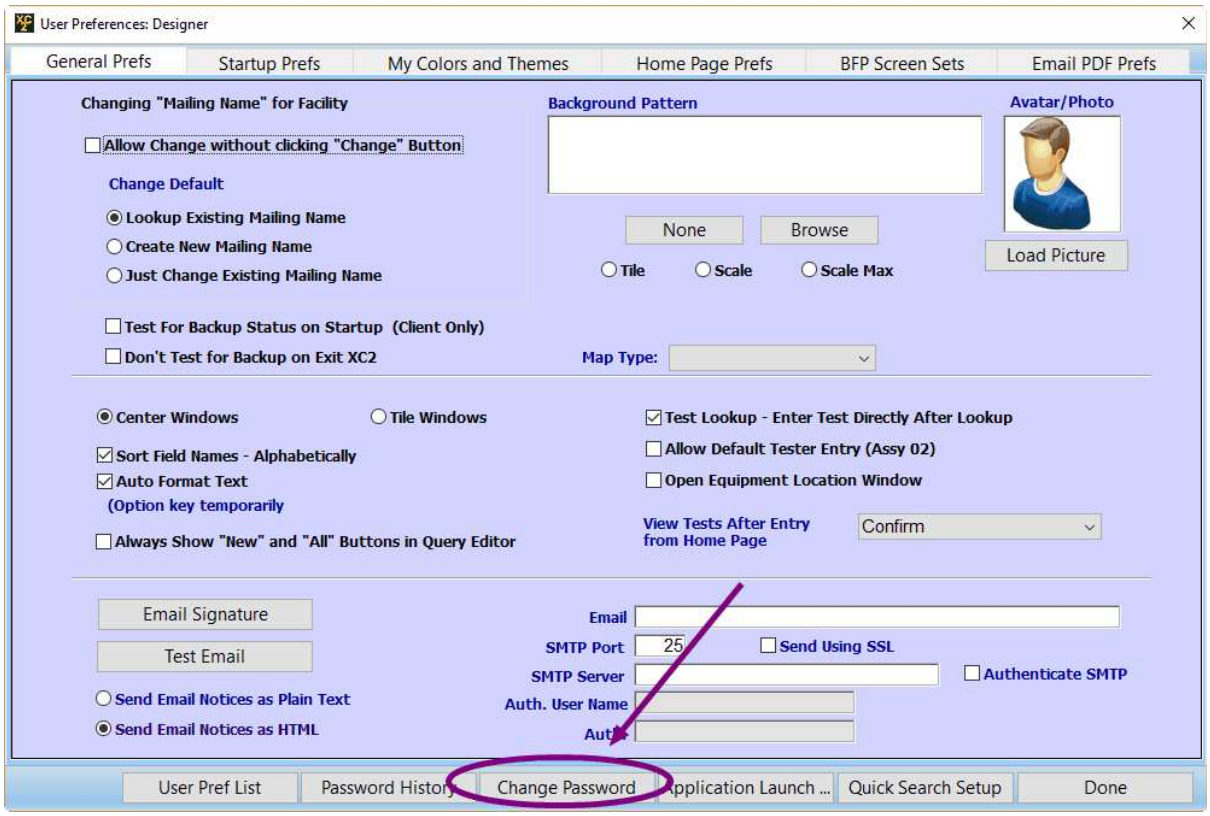
Click My User Preferences



Notes:

Change Password

Click the Change PAssword button.

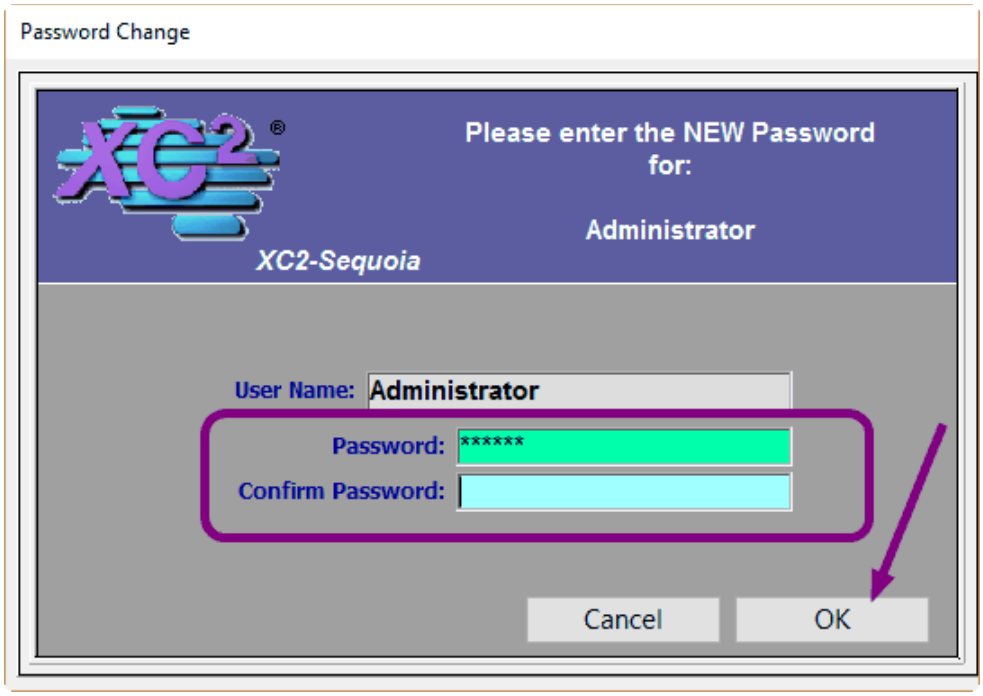


Notes:

Enter New Password

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

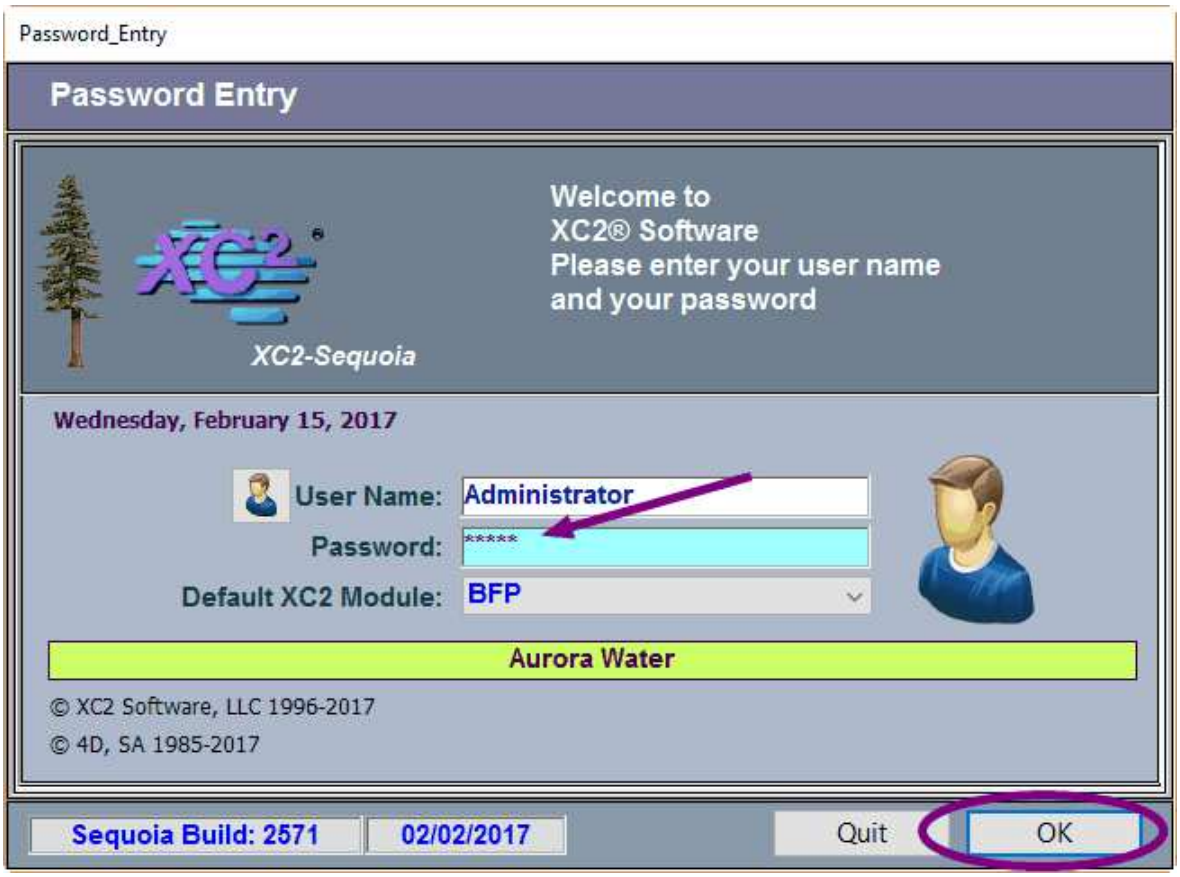
Click OK



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

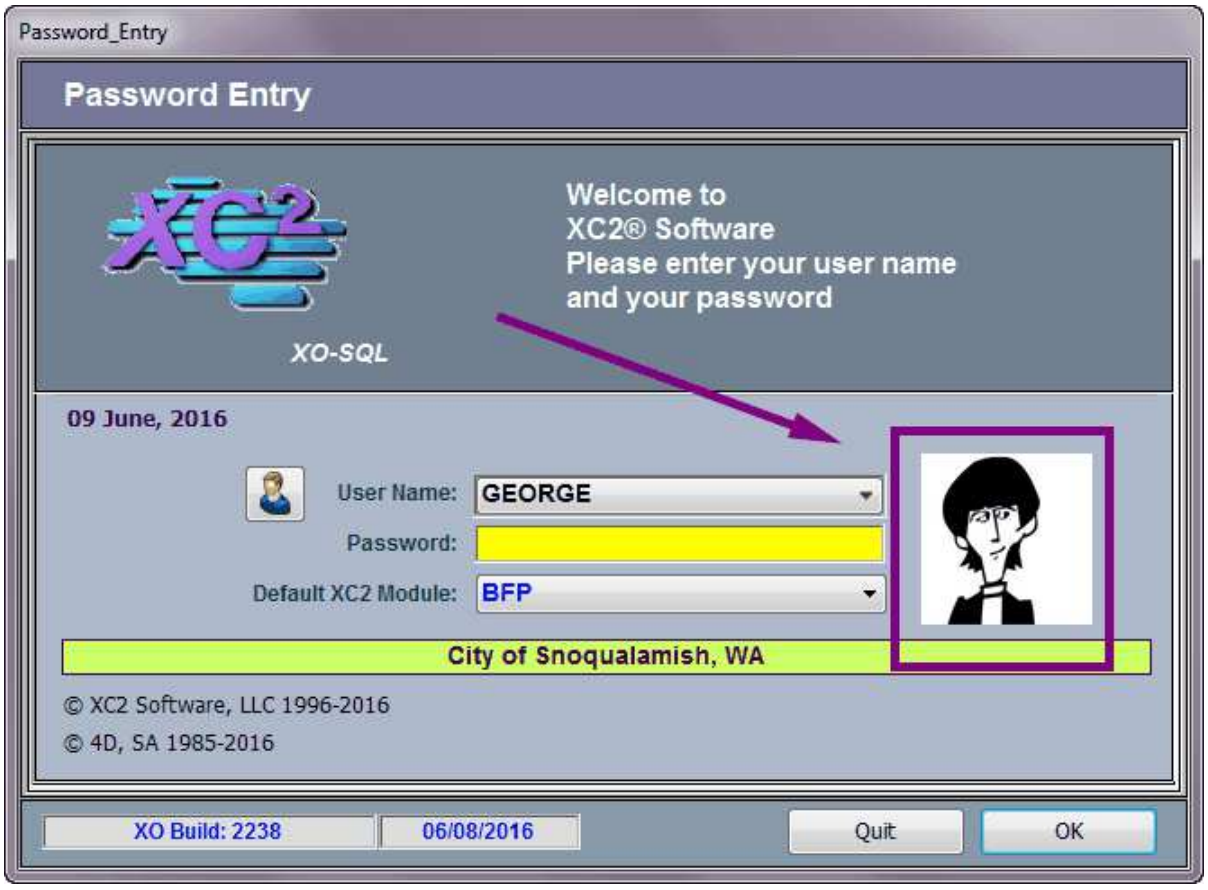
Avatar - Username Feature

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:

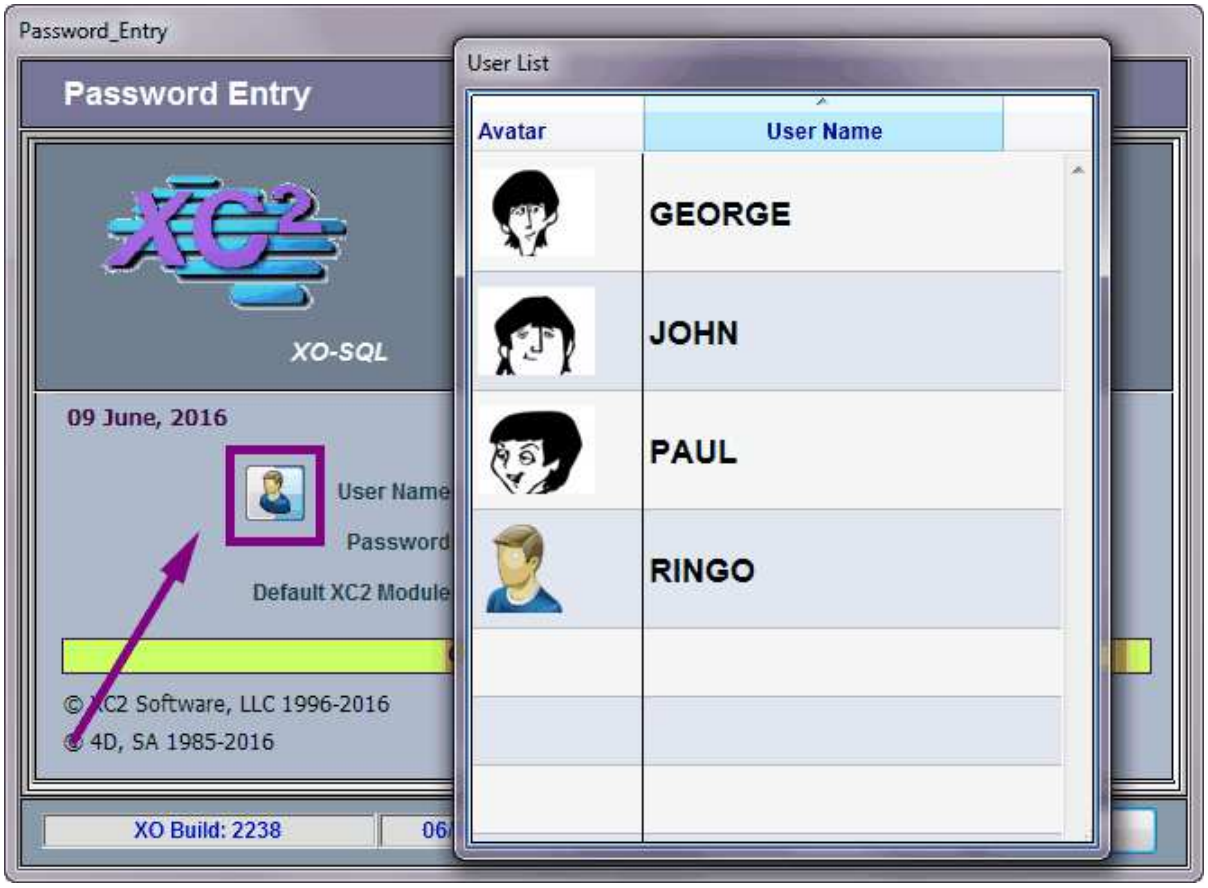
Log In with Username and Avatar

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.

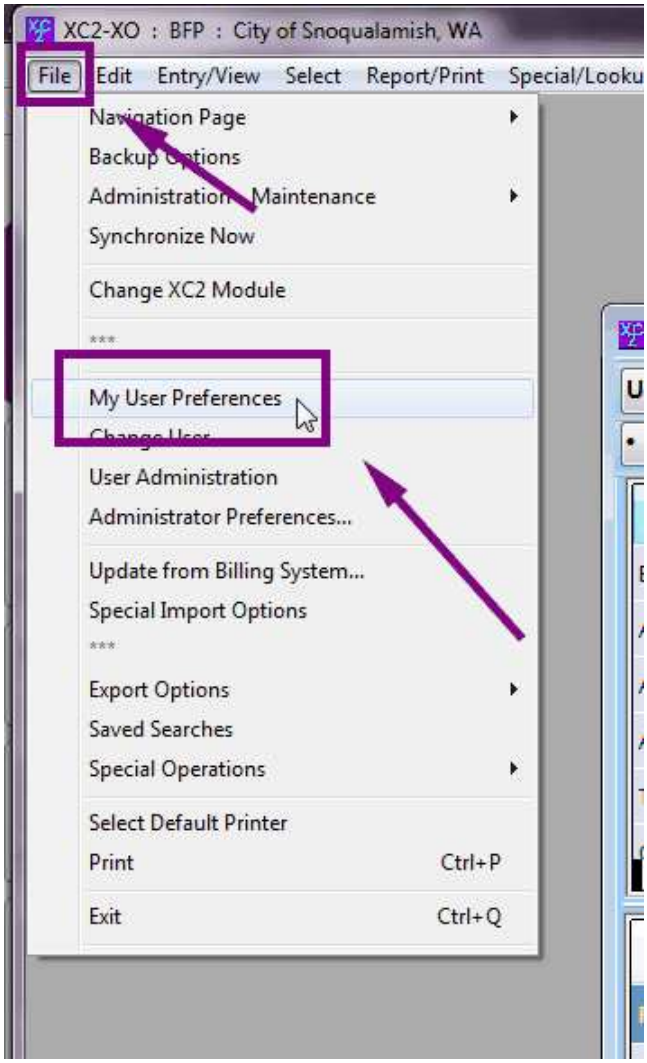


Notes:

How to upload your Avatar

Users can upload their picture in User Preferences

Go up to the File menu, select My User Preferences

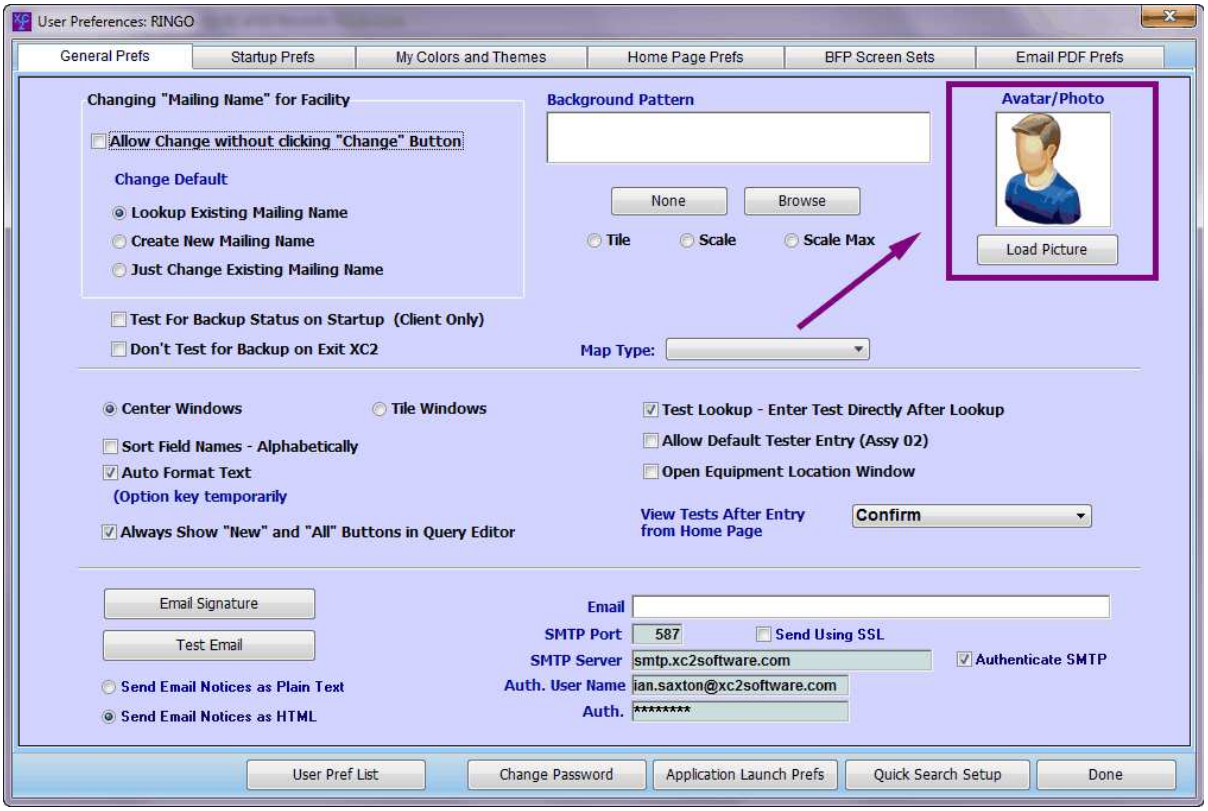


Notes:

Click Load Picture

In the top right corner

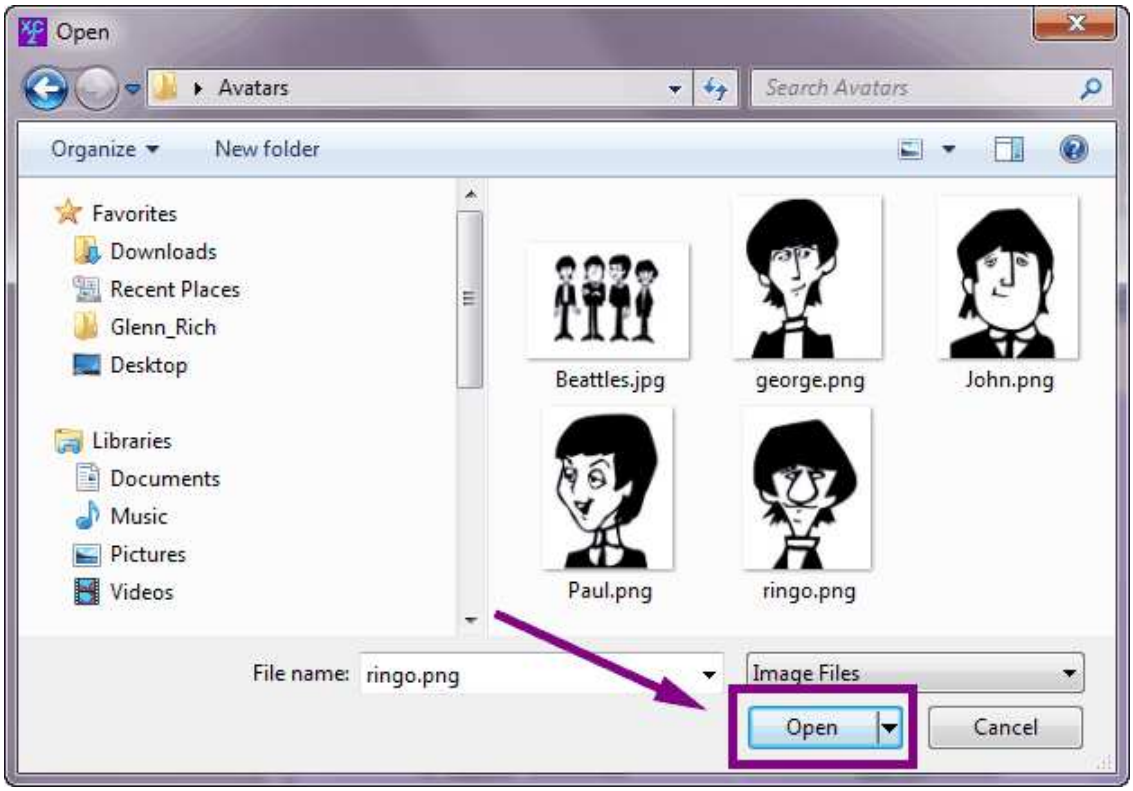
Click Load Picture



Notes:

Choose picture and click Open

Choose your picture and then click the Open button

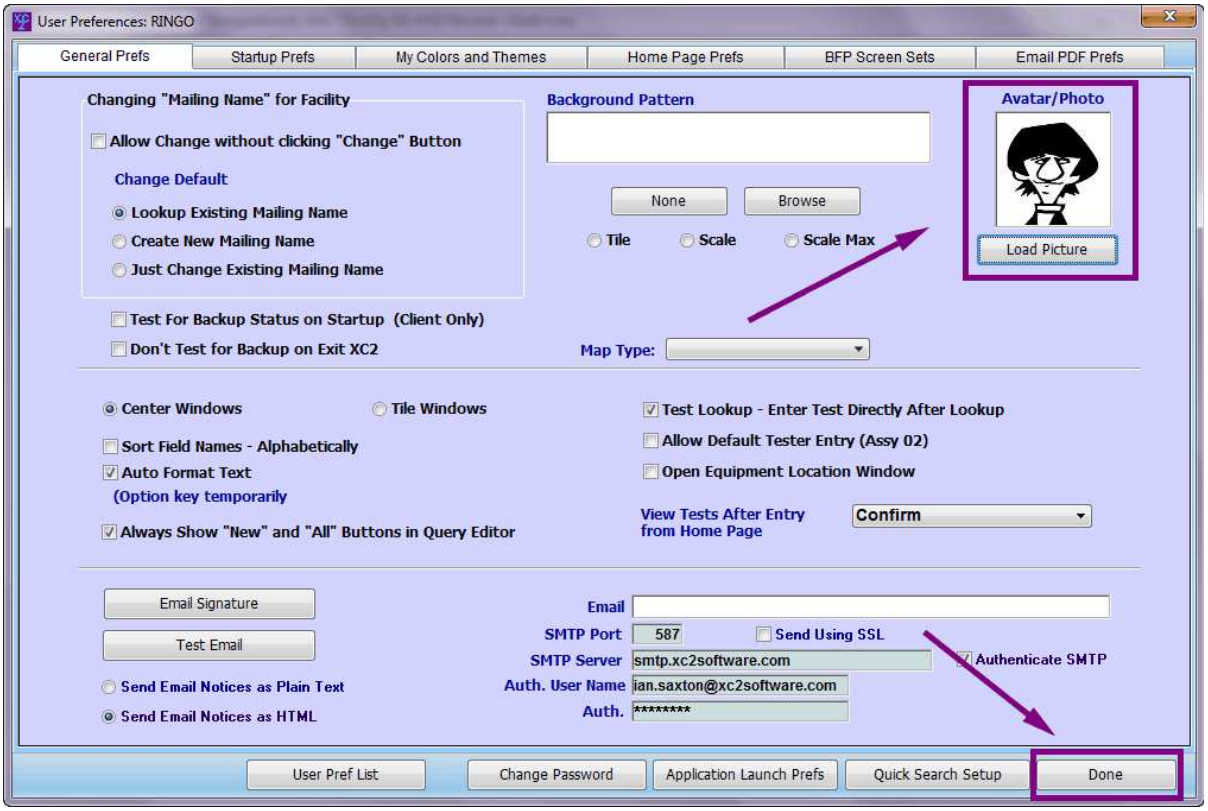


Notes:

Picture Will be Added

Your picture has been added

Click Done to save



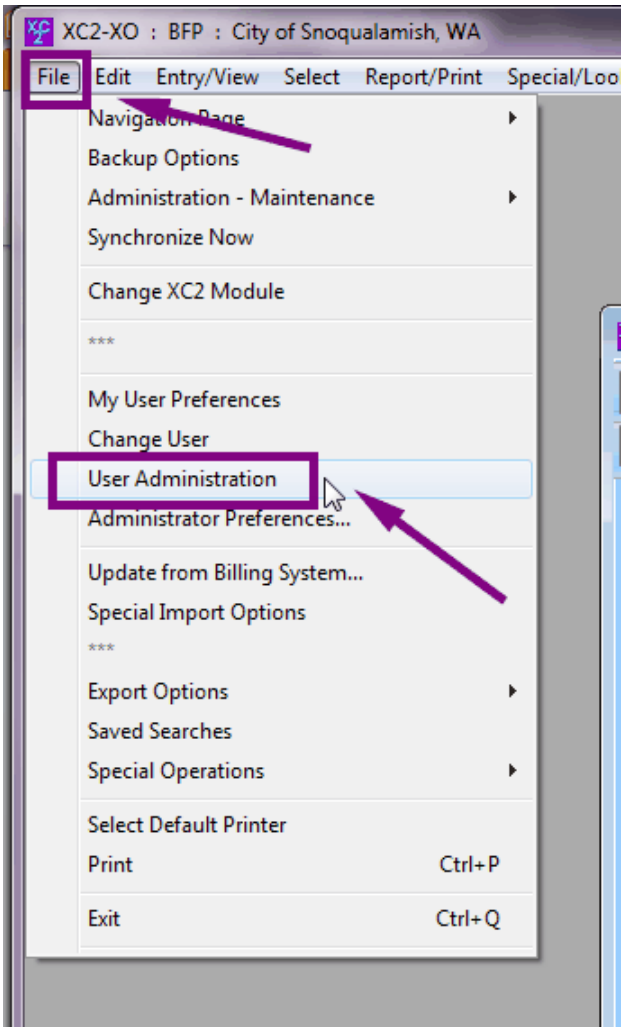
Notes:

Super Admin

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

Go up to the File menu

Select User Administration

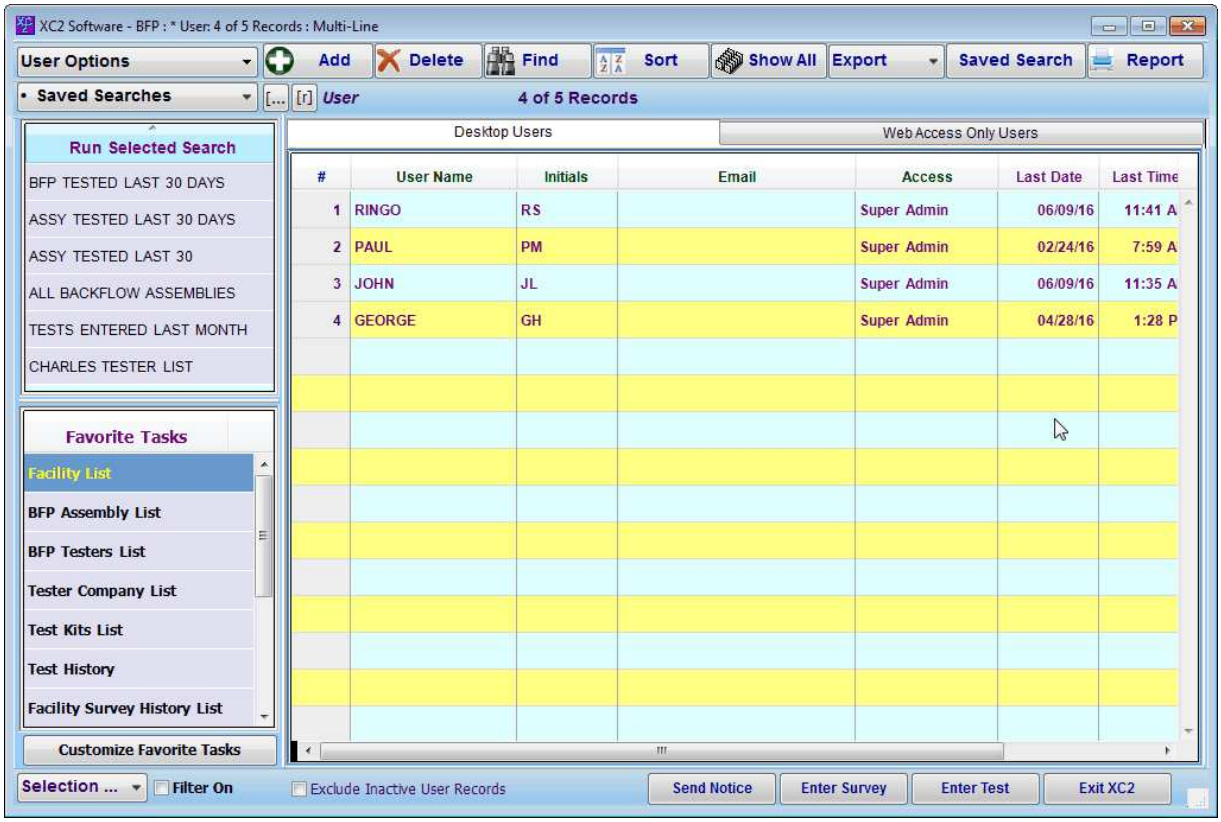


Notes:

List of All Users

This is a list of all Current Users

Double click on a record to open it

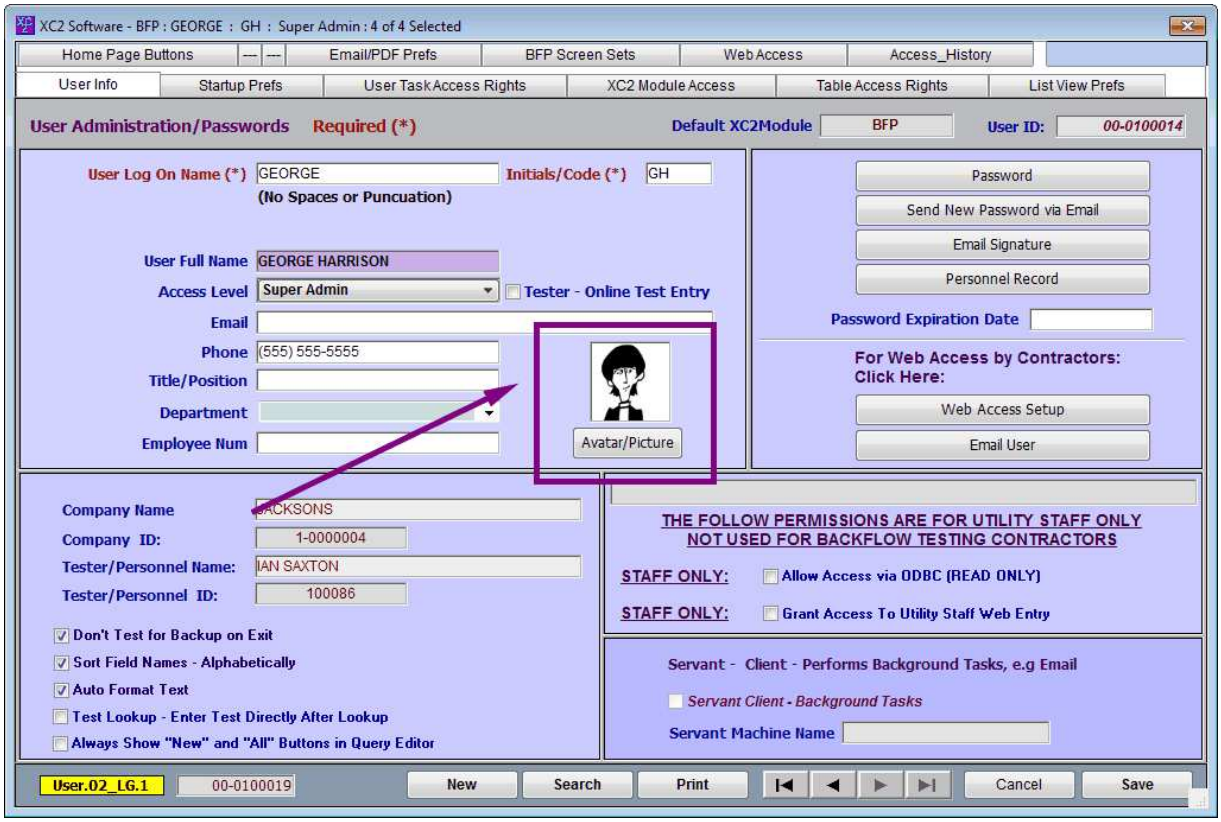


Notes:

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

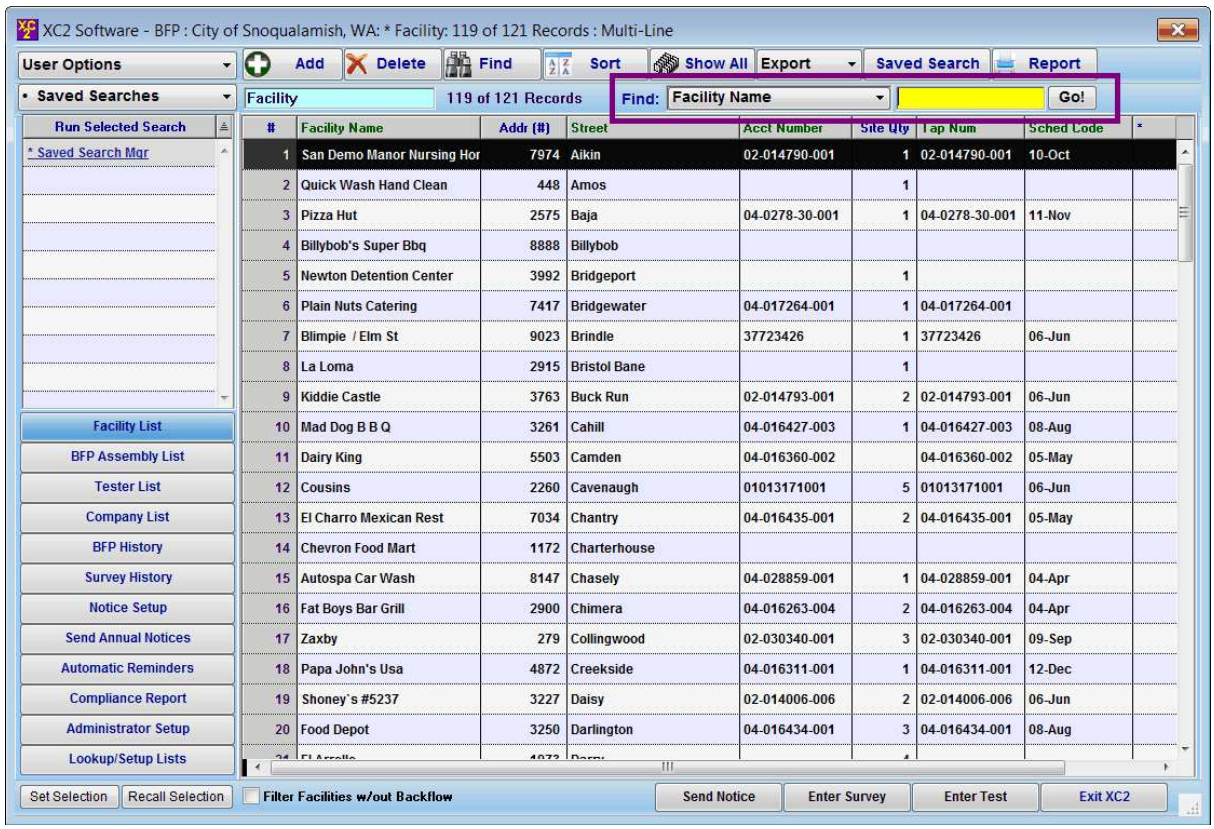
KB Asset ID: 2126

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

What is a Quick Search?

XC2's Quick Seach 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.



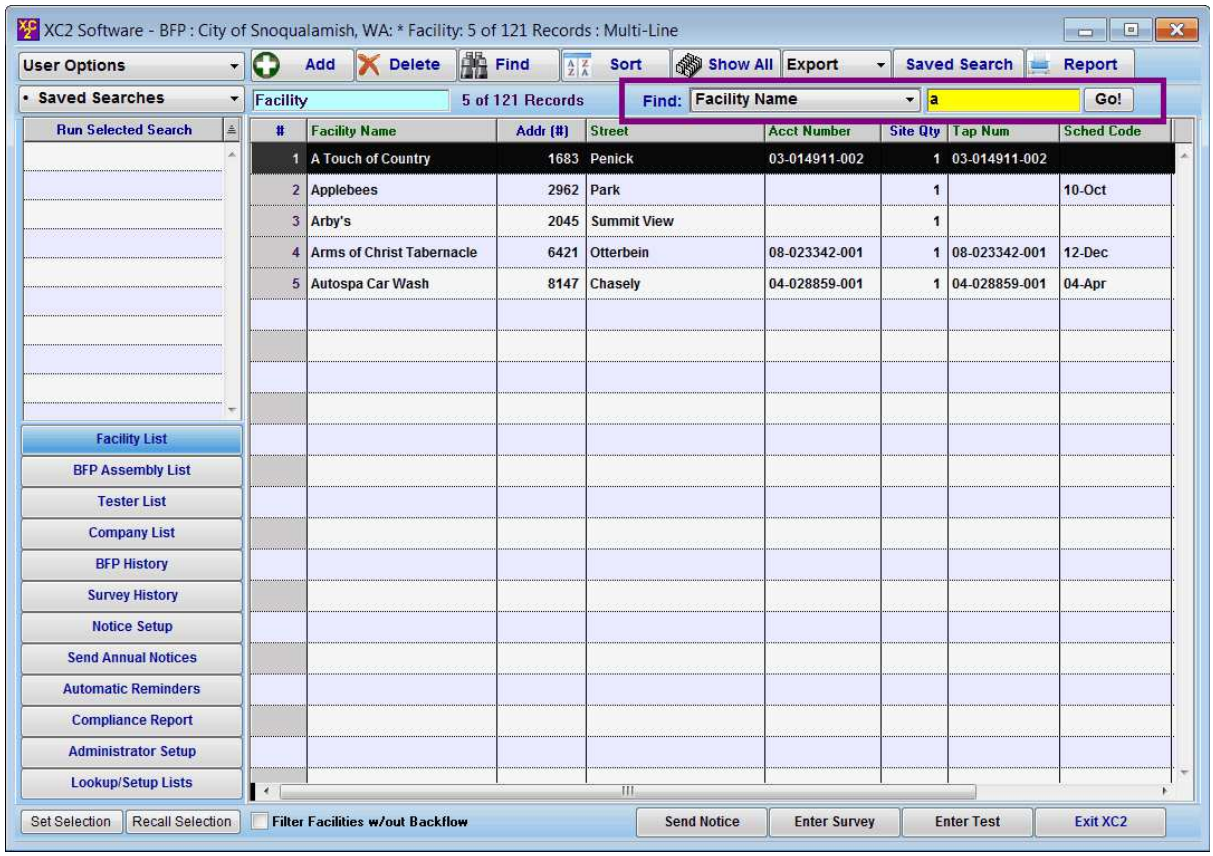
Notes:

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

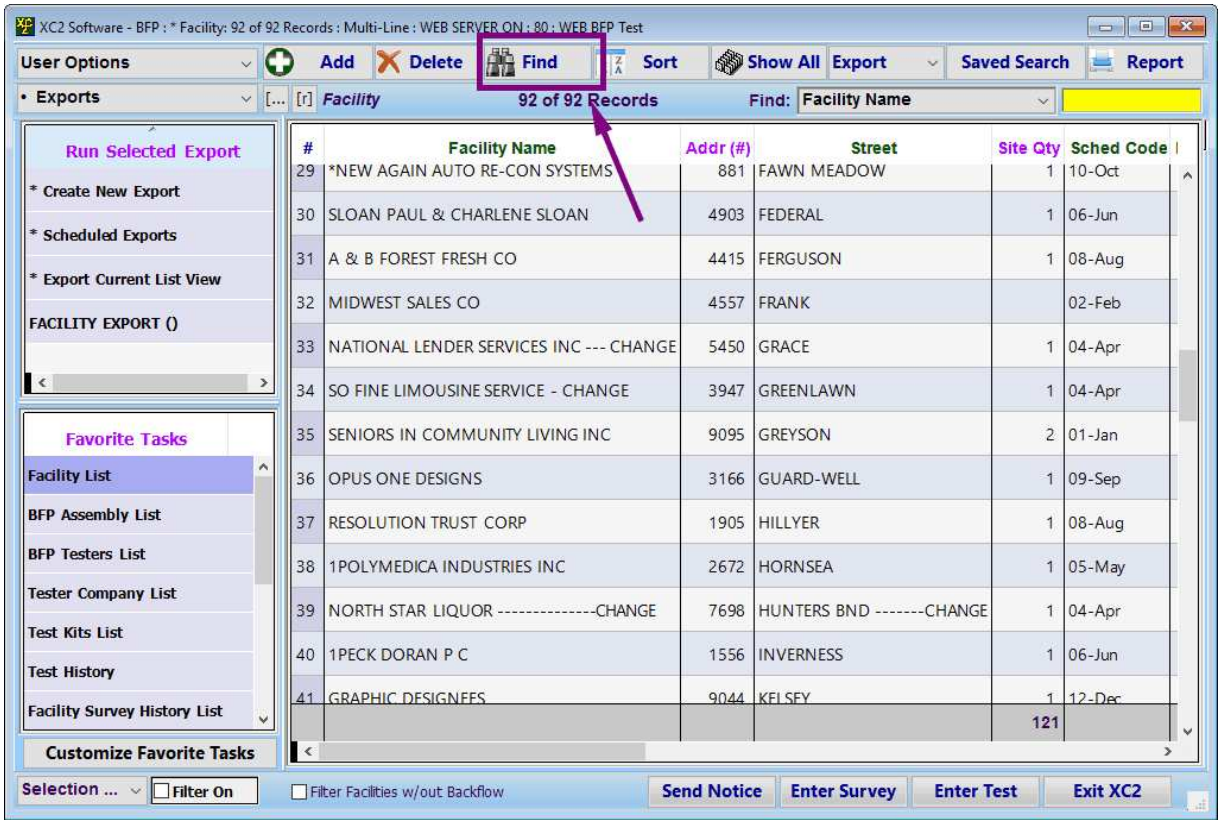
XC2 EZ - How to Use XC2's EZ Search From Search Menu

KB Asset ID: 2611

Outlines how to use XC2's EZ Search

Search Window

Click find to access the Search Window



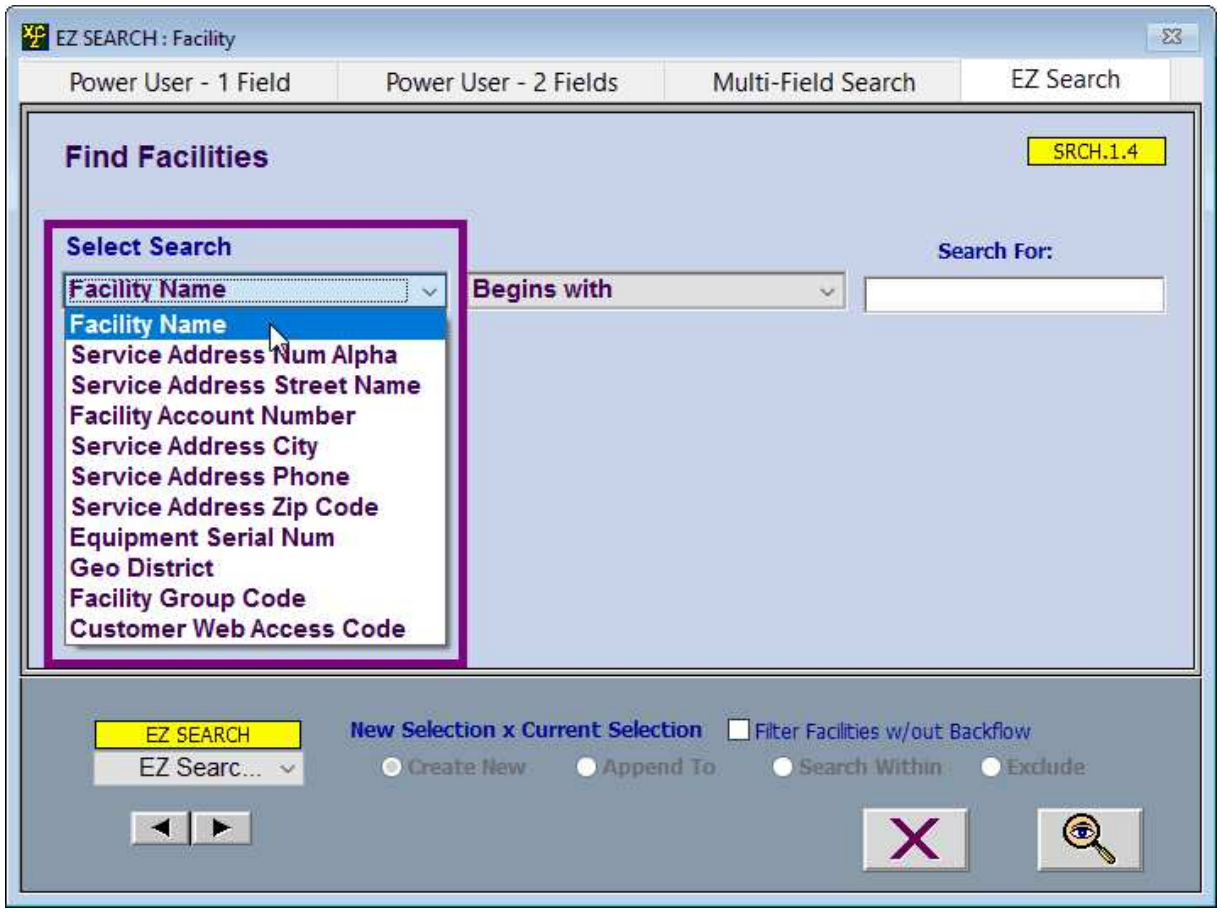
Notes:

EZ Search

XC2's EZ Search is the Most Basic Search option

Select a Search Criteria

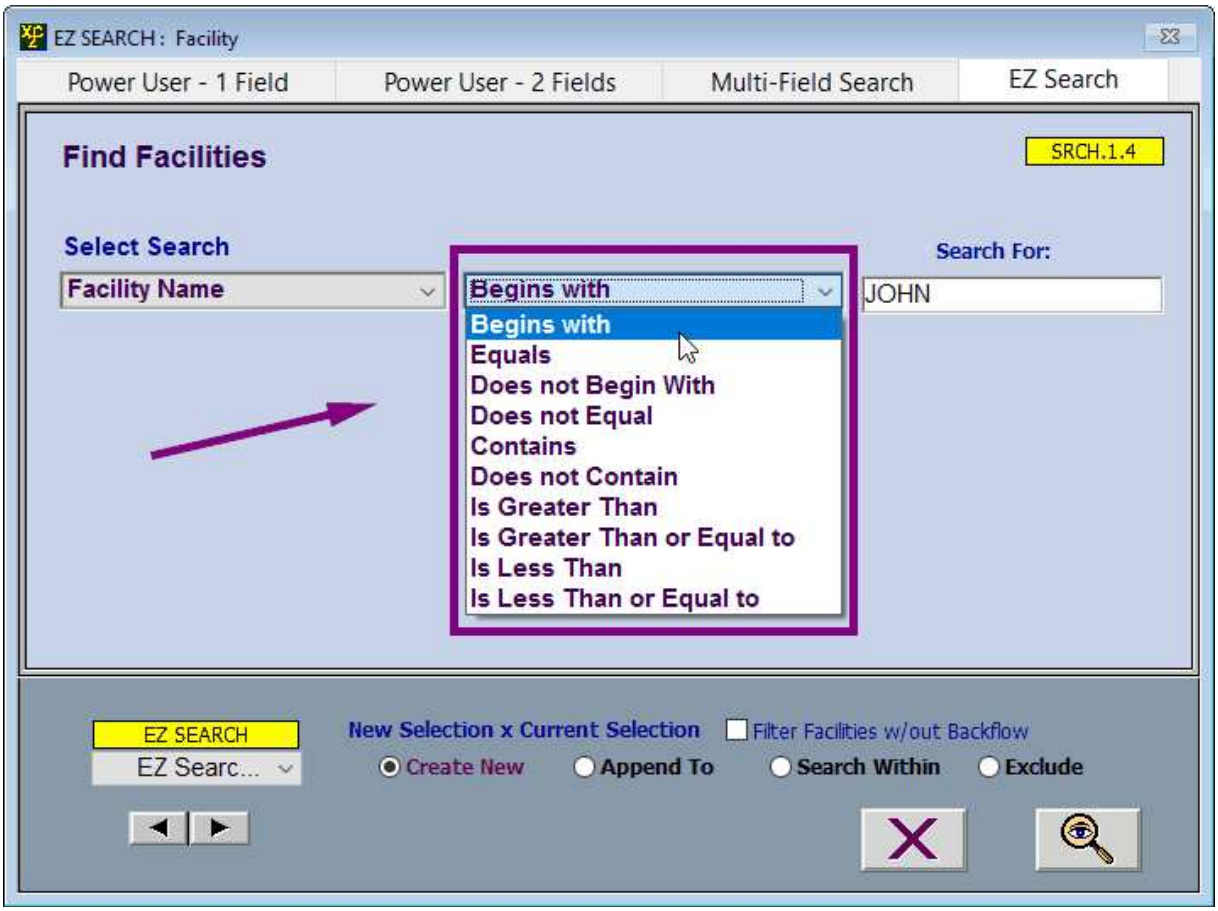
Note: Each User can customize their own EZ Search Options



Notes:

Select how you search

Select how you want XC2 to Search

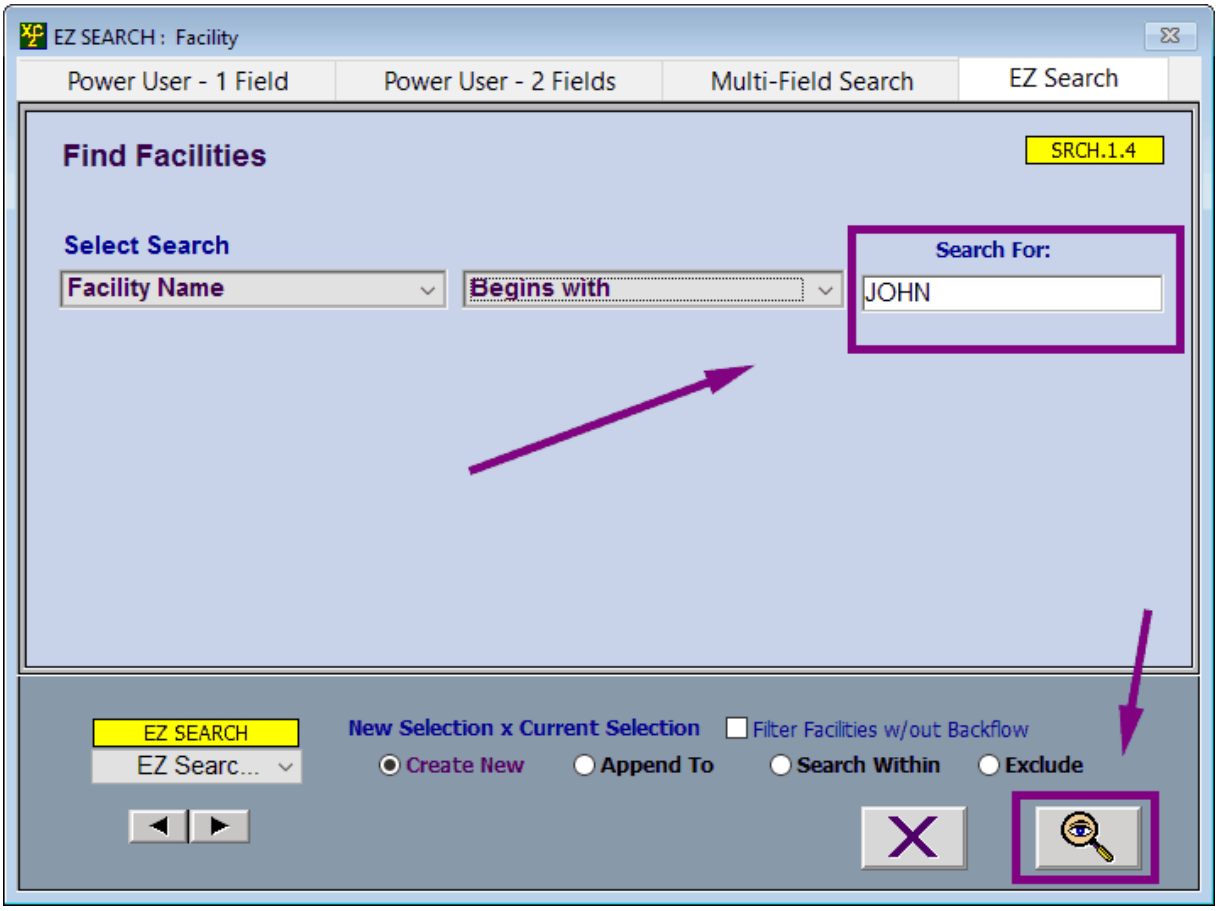


Notes:

Type what you want to find

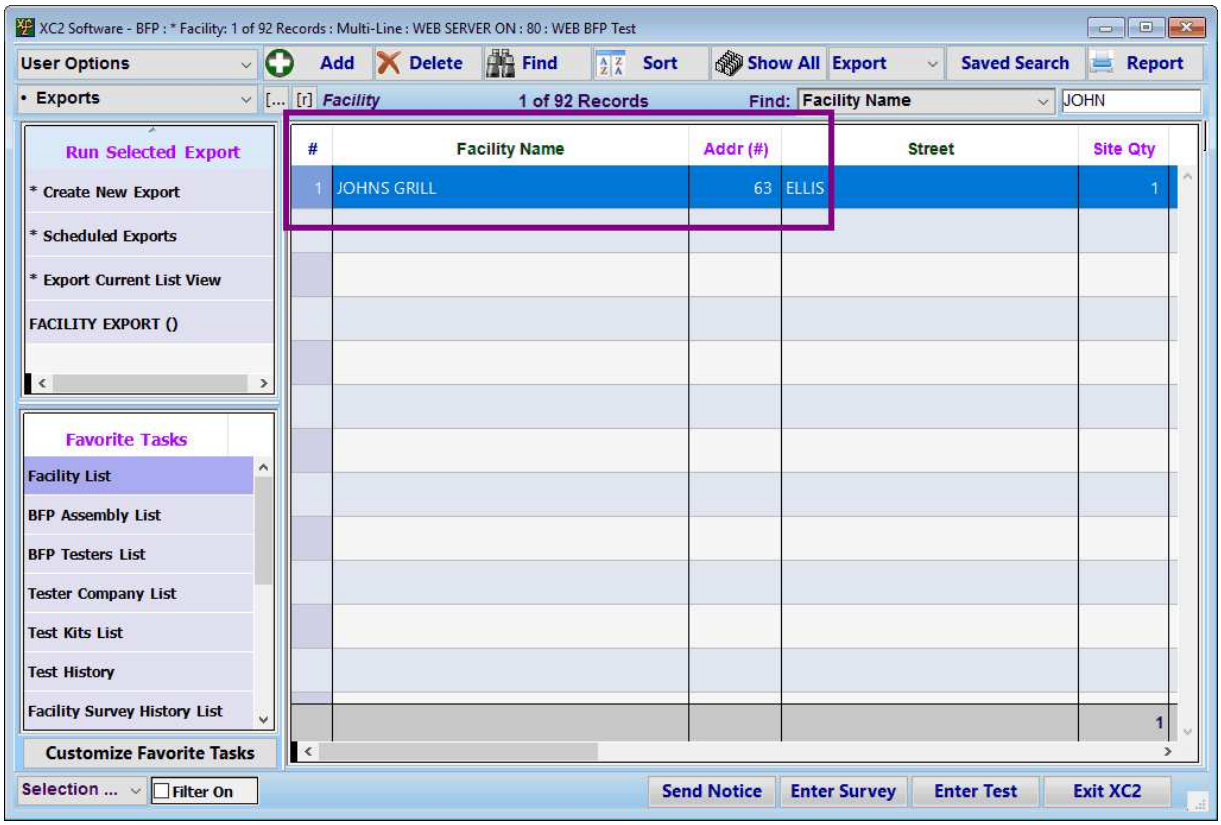
Type you search value

click the magnifying glass to search



Notes:

Results will appear in the list view area



Notes:

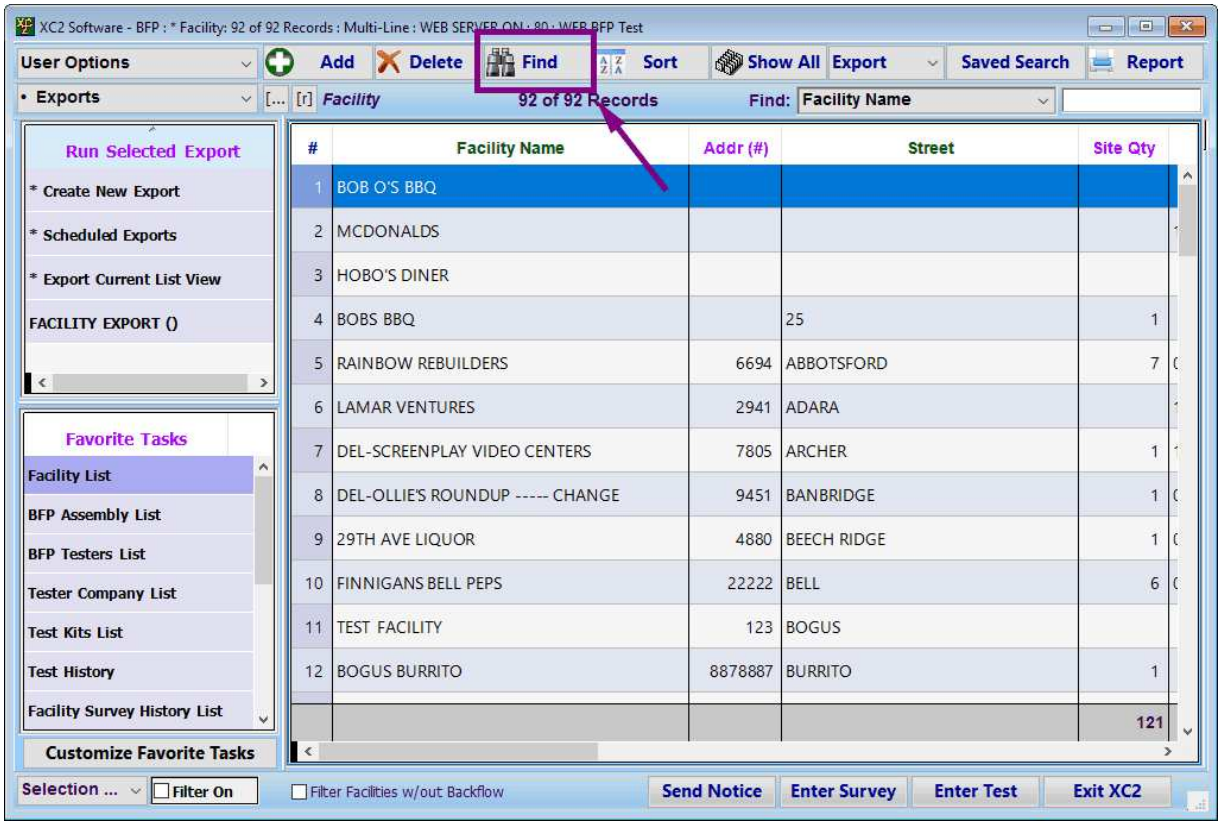
XC2 Software Knowledge Base

Multi-Field Search

KB Asset ID: 3627

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

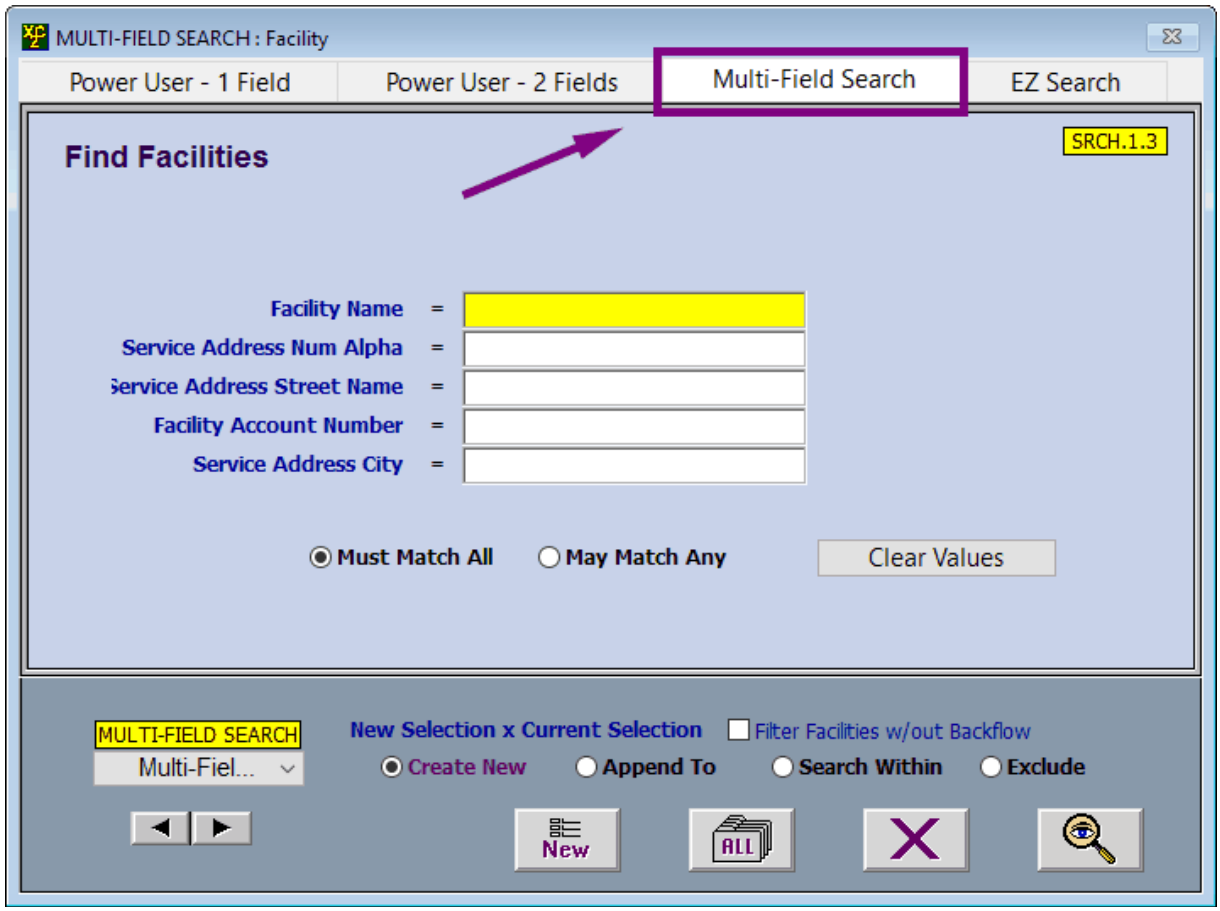
Click the Search Menu



Notes:

Multi-Field Search

Click the Multi-Field Search Tab

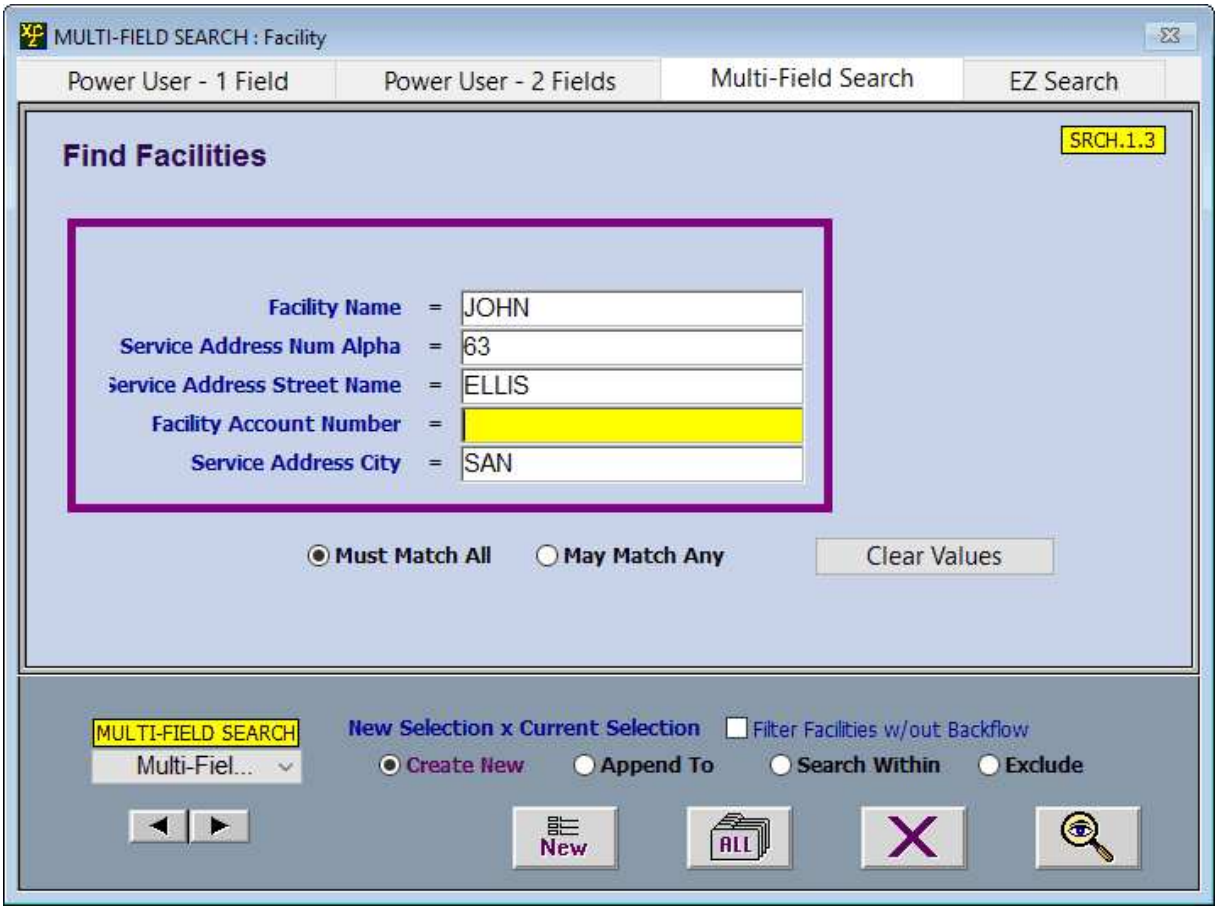


Notes:

Add up to 5 Items

You can add up to 5 search parameters

Type your parameters



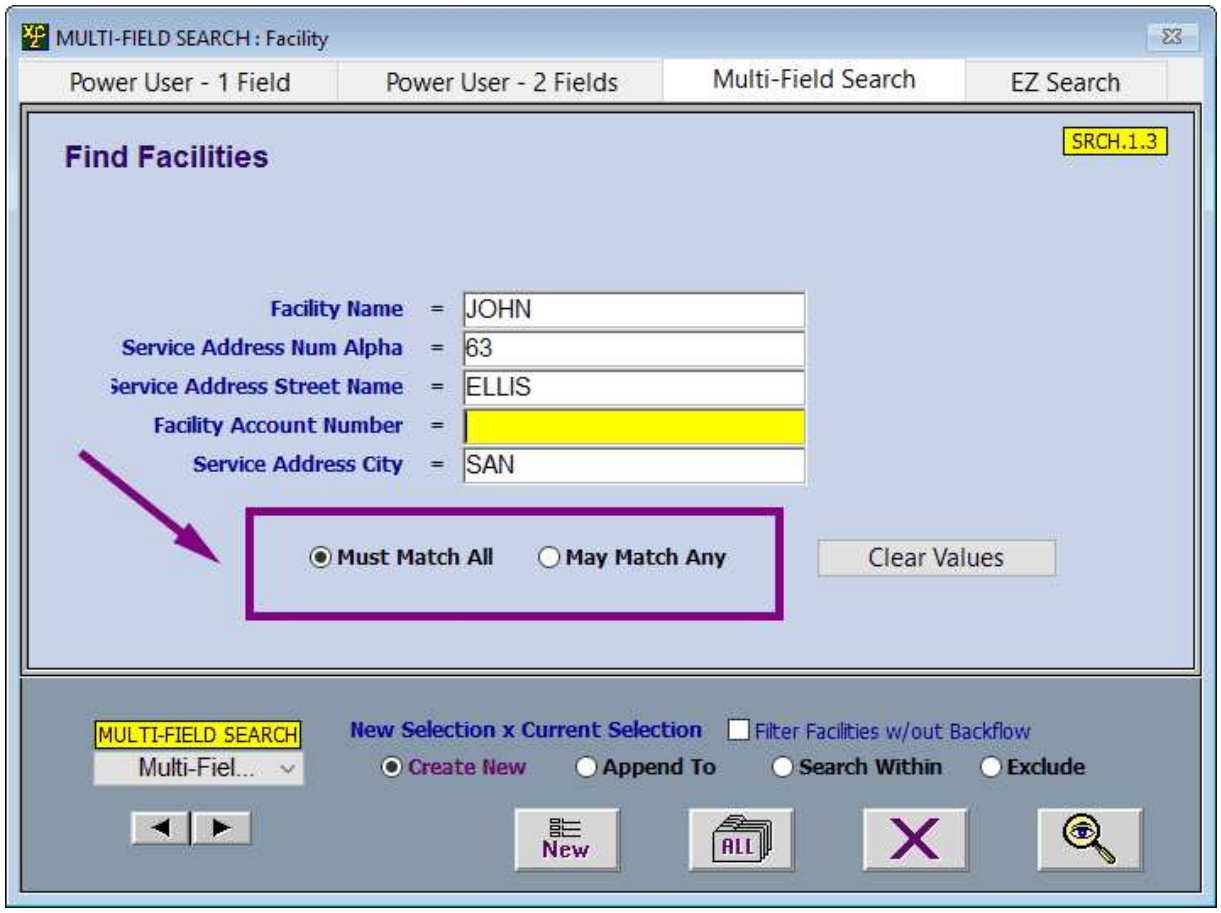
Notes:

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 magnifing glass to search



Notes:

XC2 Software Knowledge Base

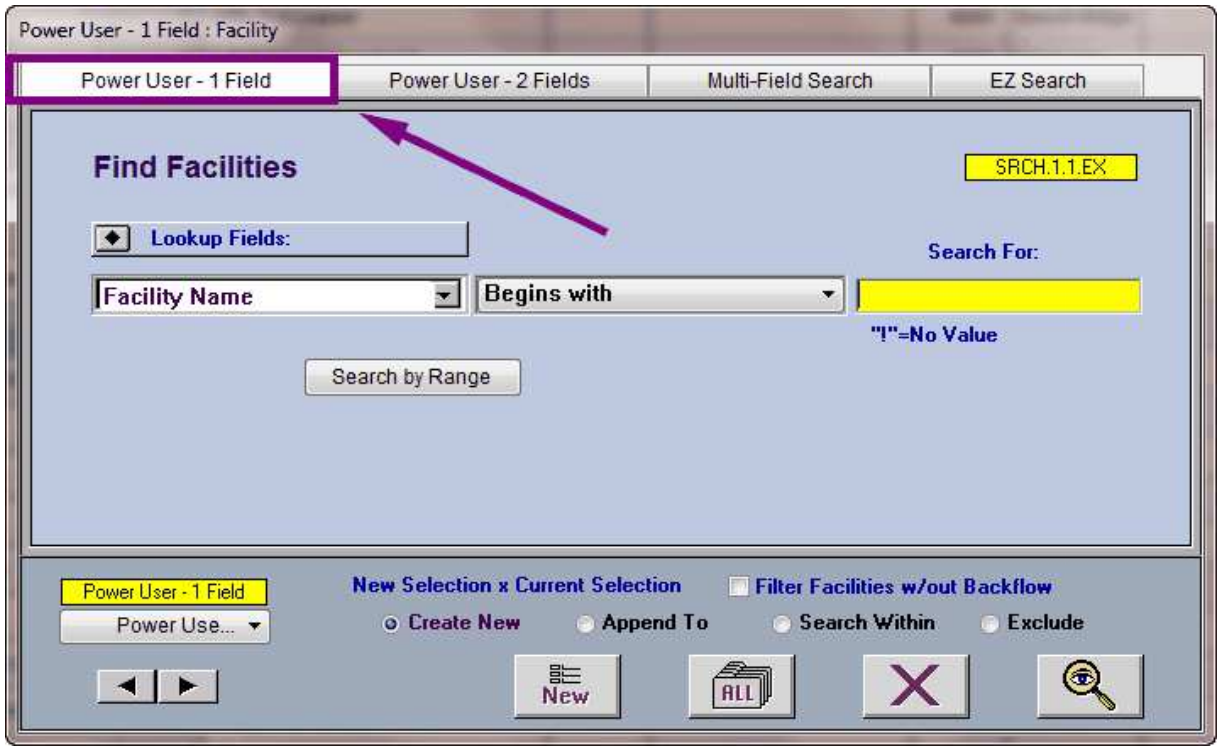
How to Use XC2's Power User - 1 Field Search

KB Asset ID: 2609

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

Power User 1

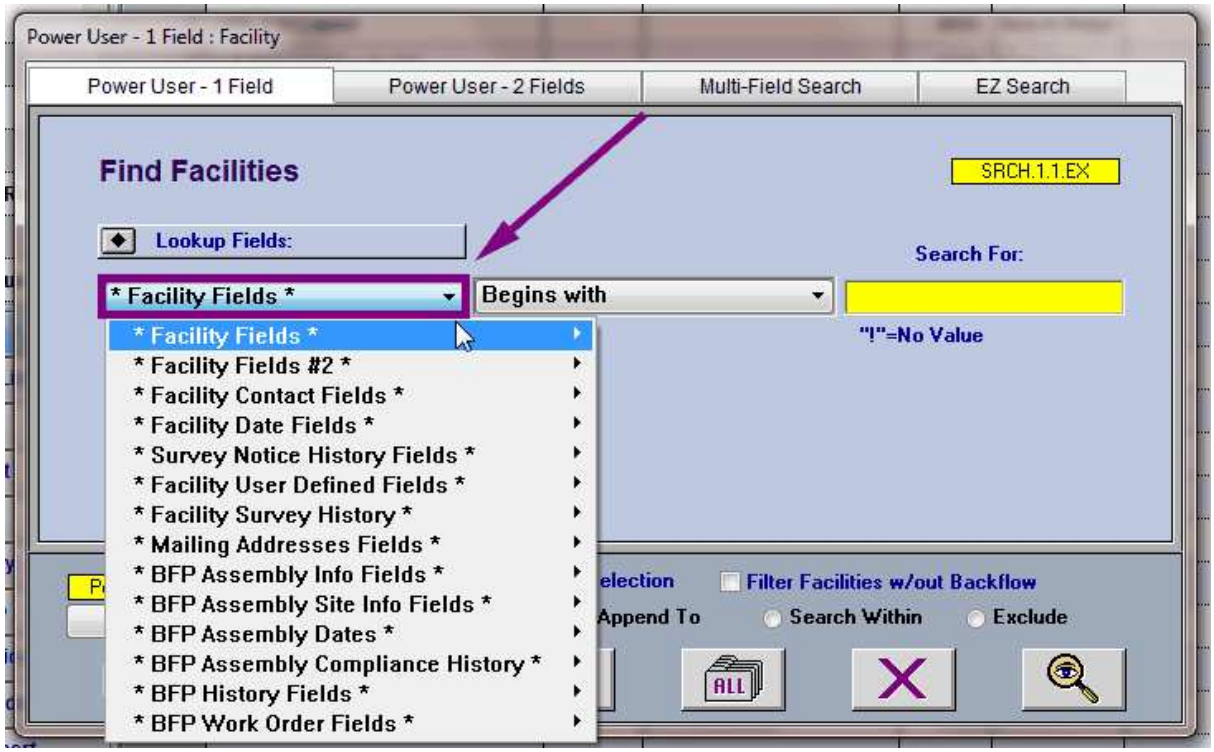
Unlike EZ search and Muliti-Field search, Power User 1 search offers many different Search parameters you may choose from.



Notes:

Select Category

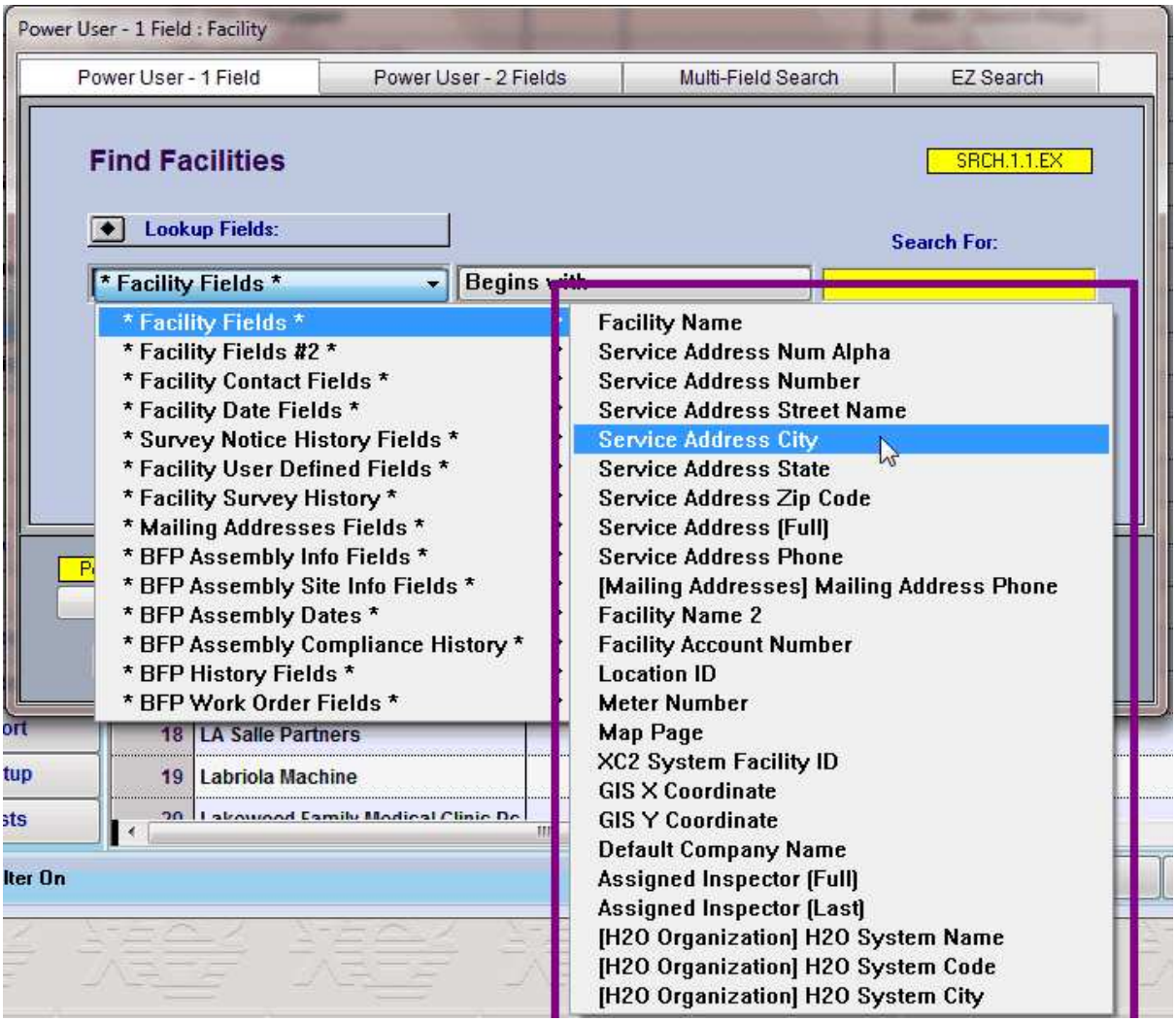
First select a category, click the pull-down menu to display the available categories.



Notes:

Choose parameter

Next choose the parameter you would like to search by.

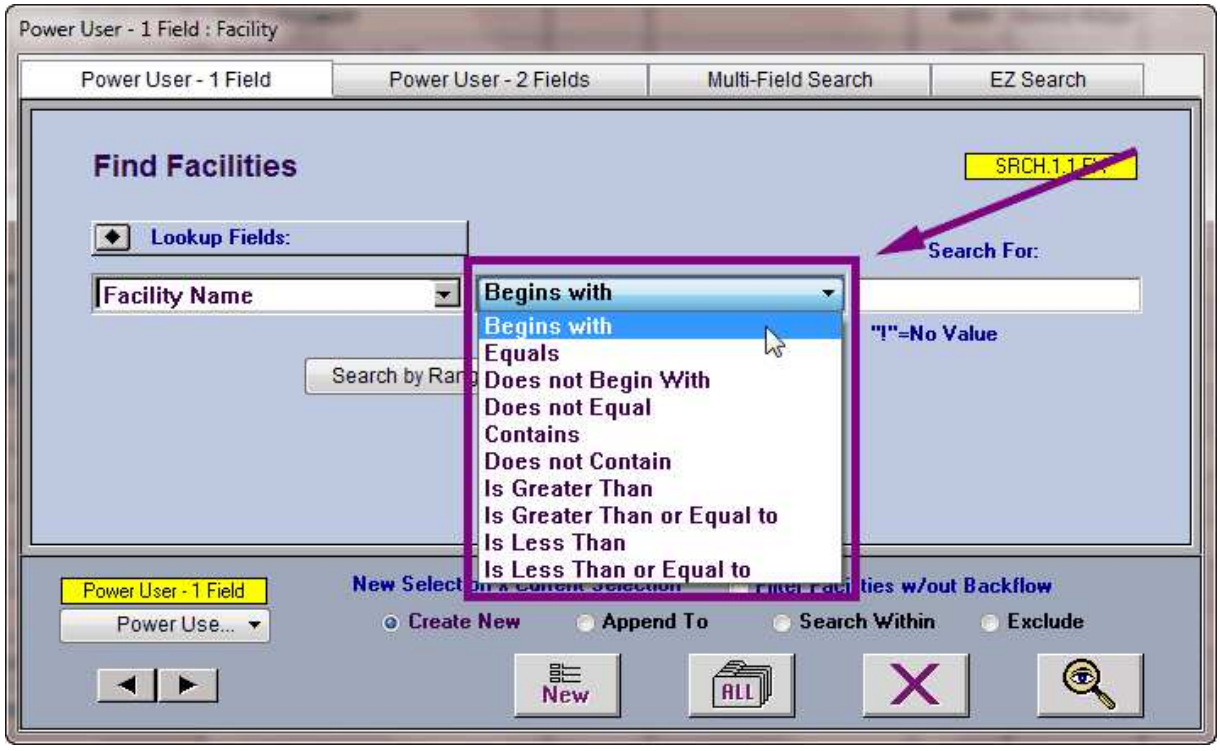


Notes:

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

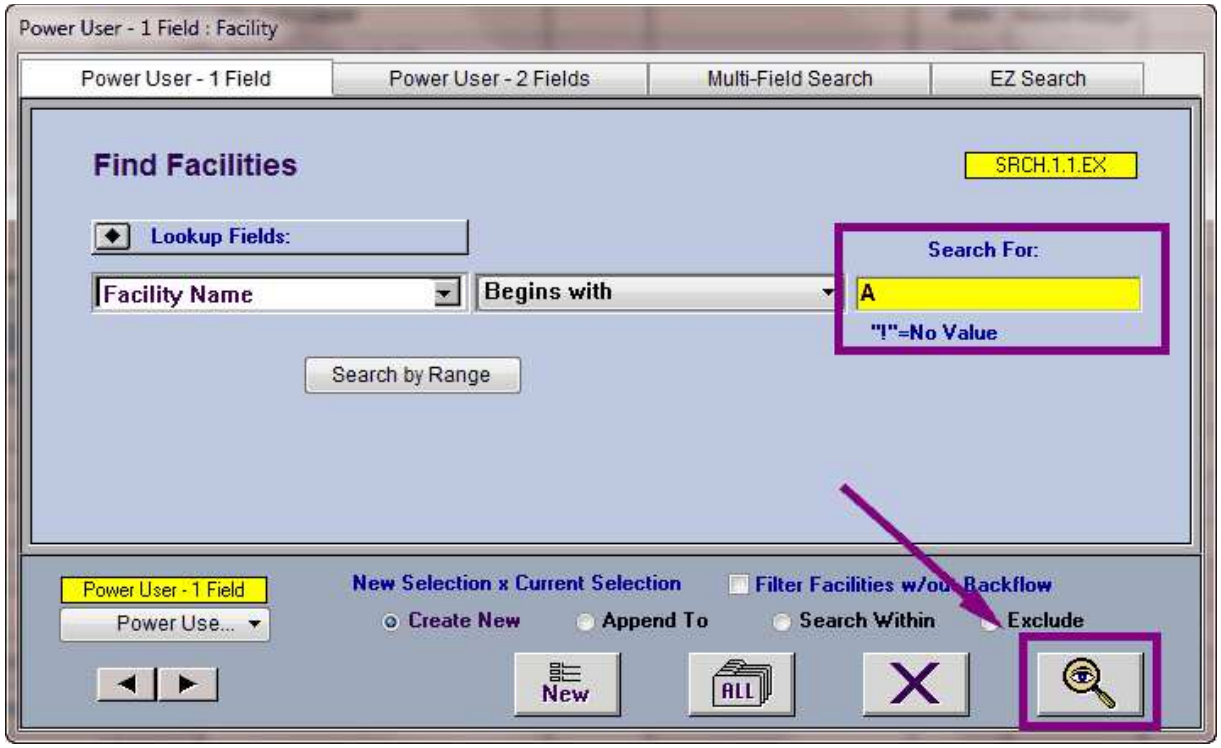


Notes:

Search For

Type what you would like to search for

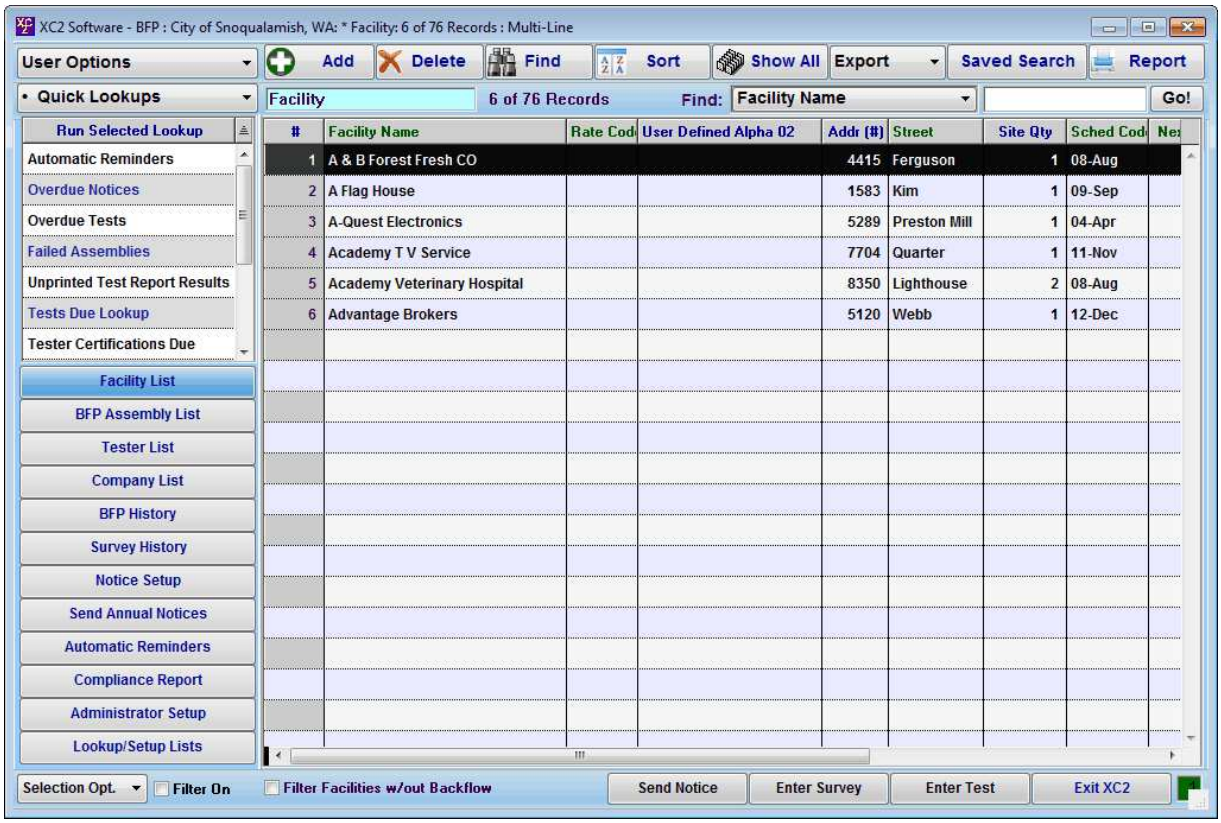
Click the Magnifying Glass on the lower right corner



Notes:

Search Results

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



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.

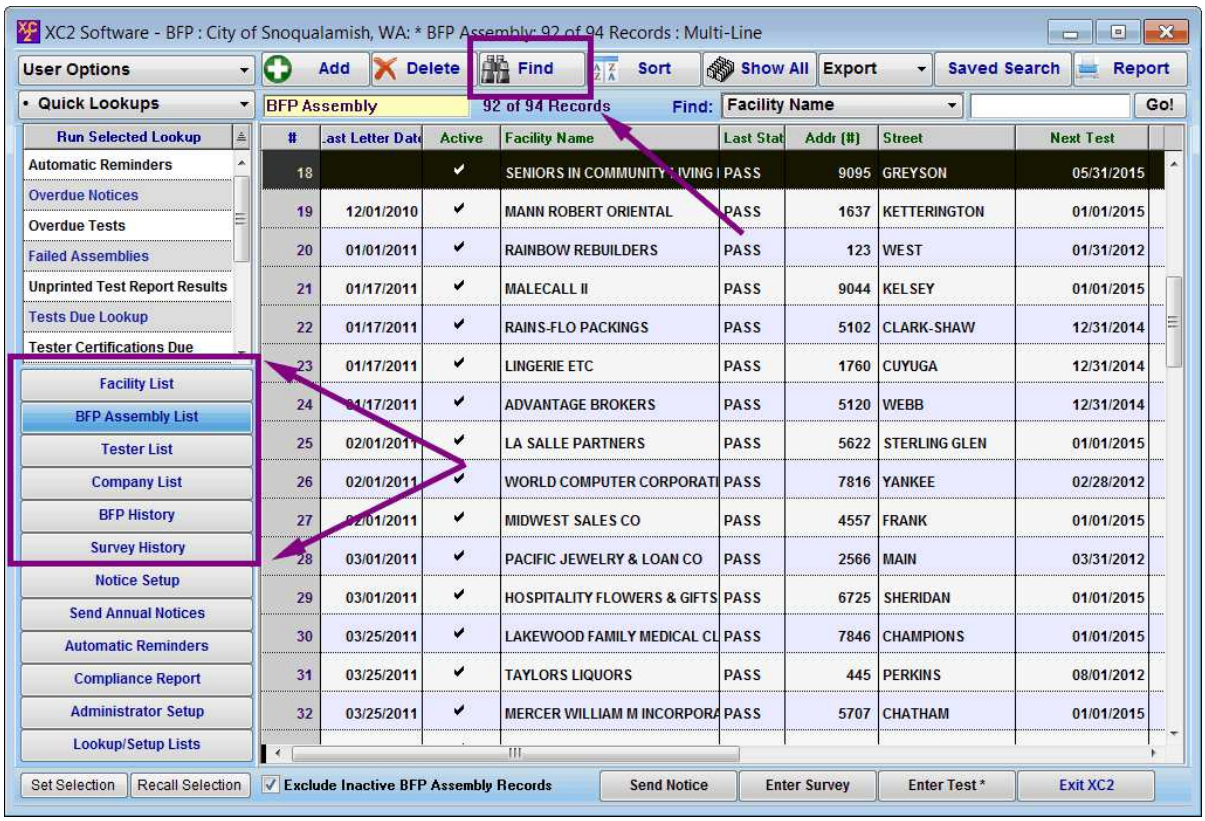
Below outlines the process of how you can find specific records based upon a date range.

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.

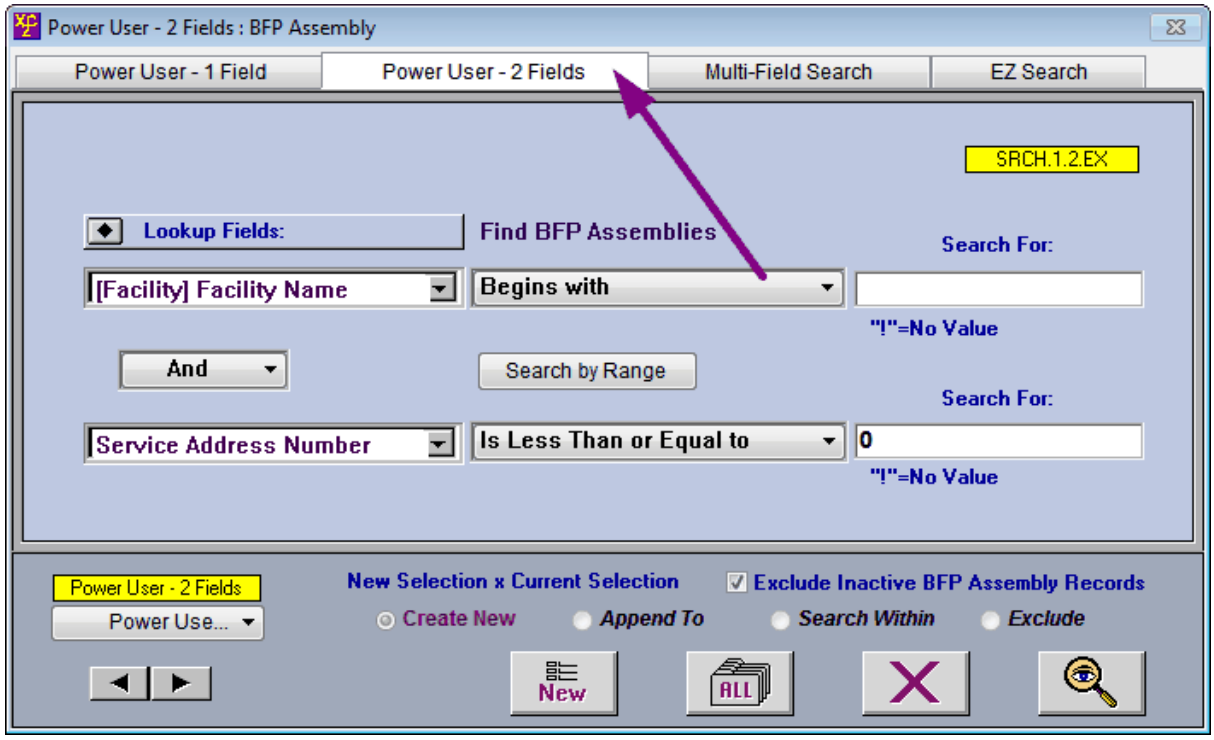


Notes:

Power User - 2

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

Power User - 2 Fields

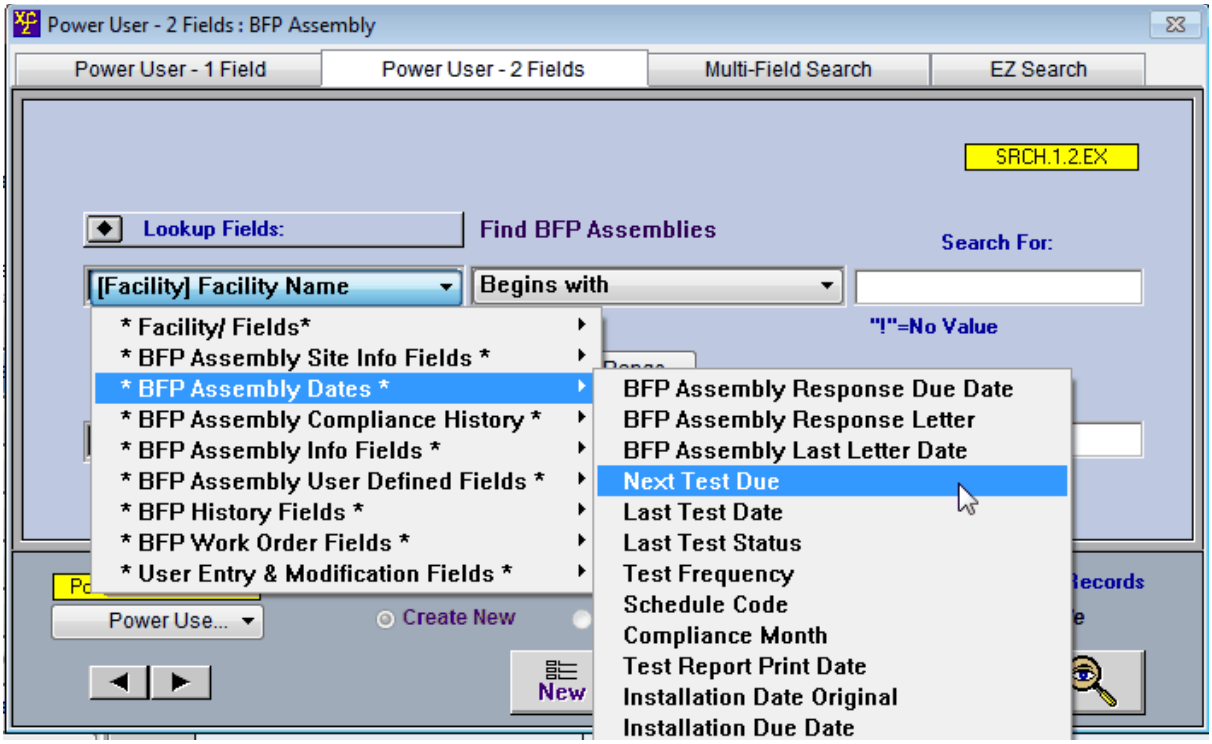


Notes:

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:

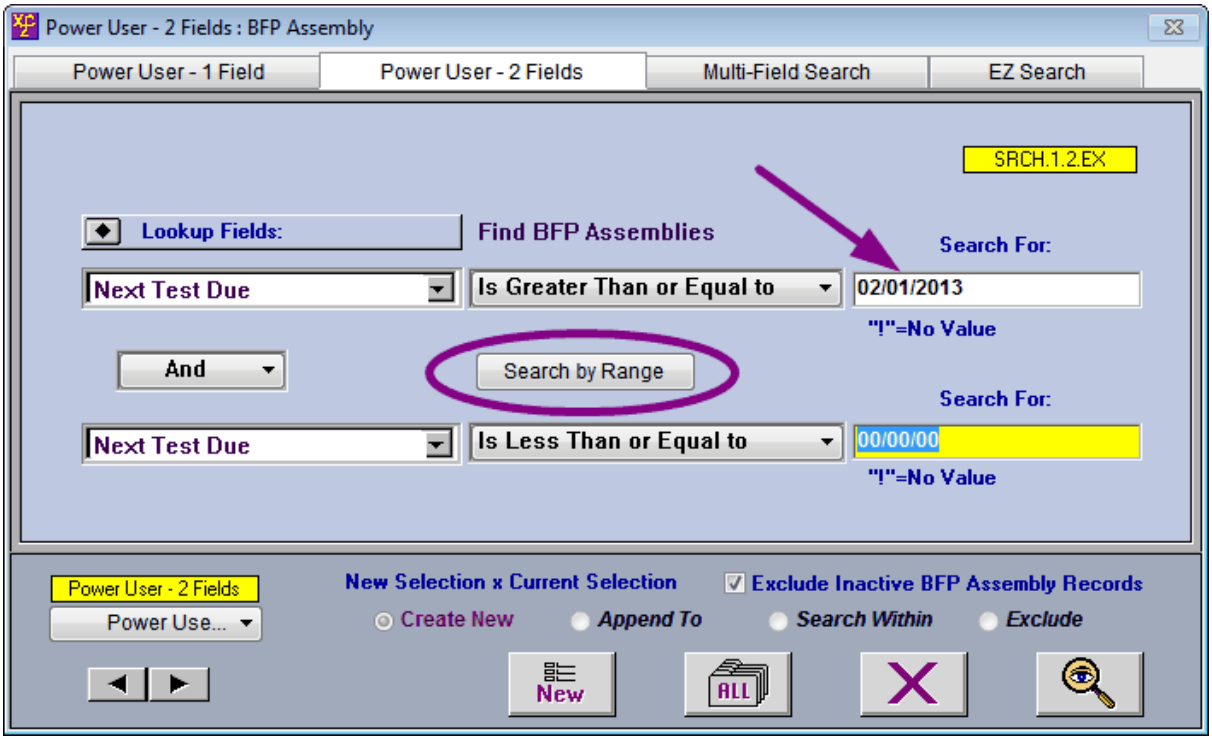
Choosing the Date Range

Type the start date in the first field

Then

Click Search By Range

Search By Range Button

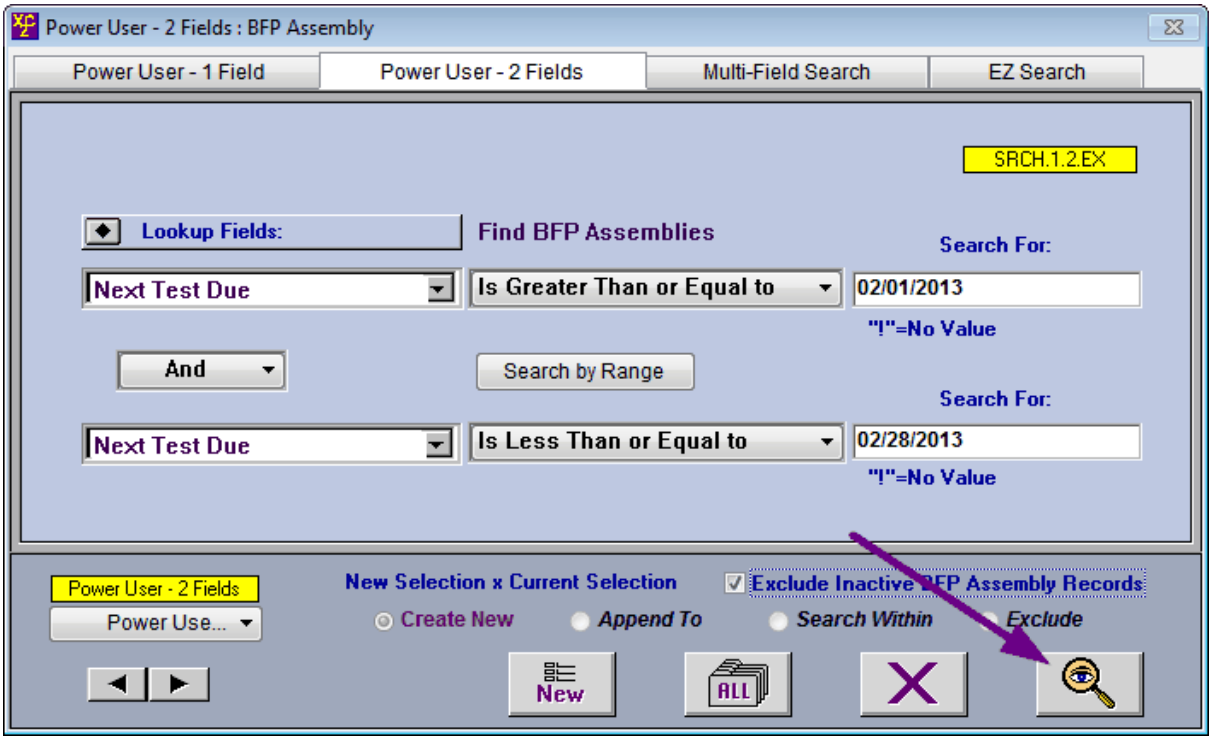


Notes:

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.



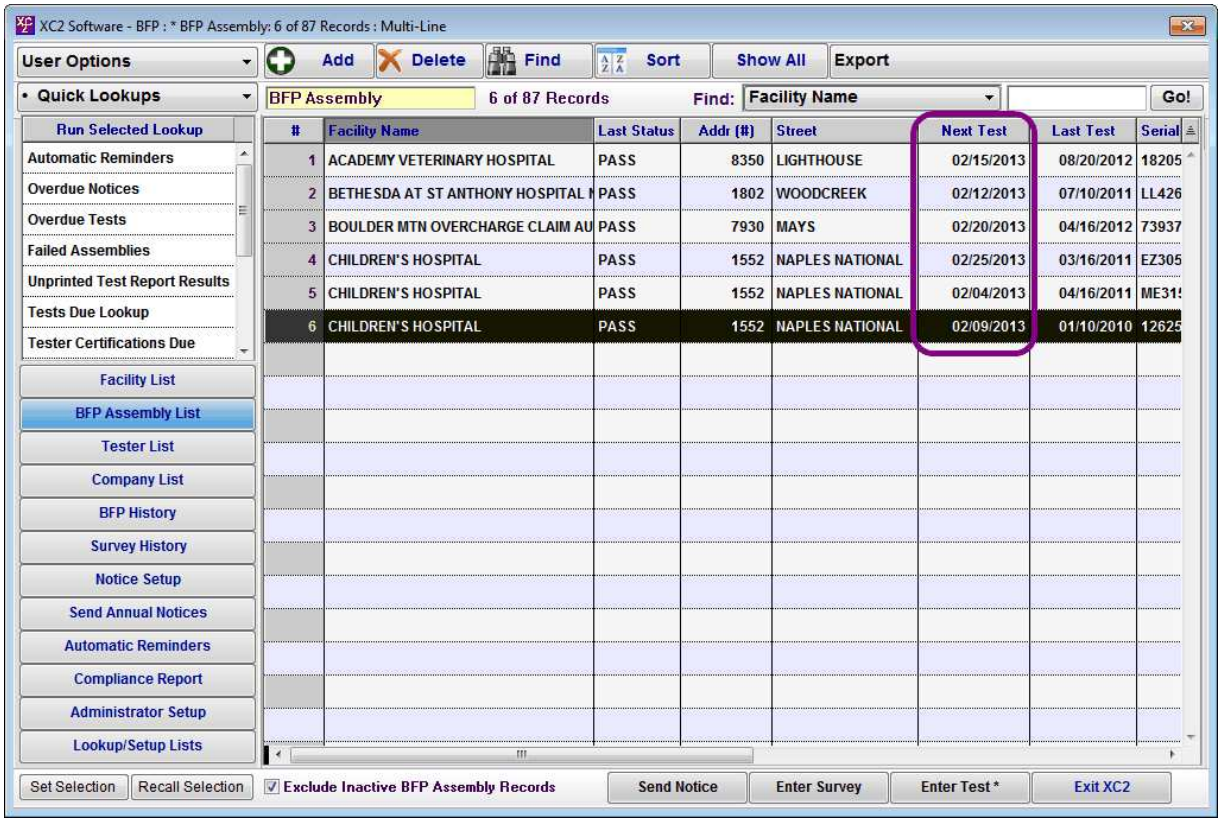
Notes:

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



Notes:

XC2 Software Knowledge Base

How to Create a Saved Search in XC2 Backflow

KB Asset ID: 3216

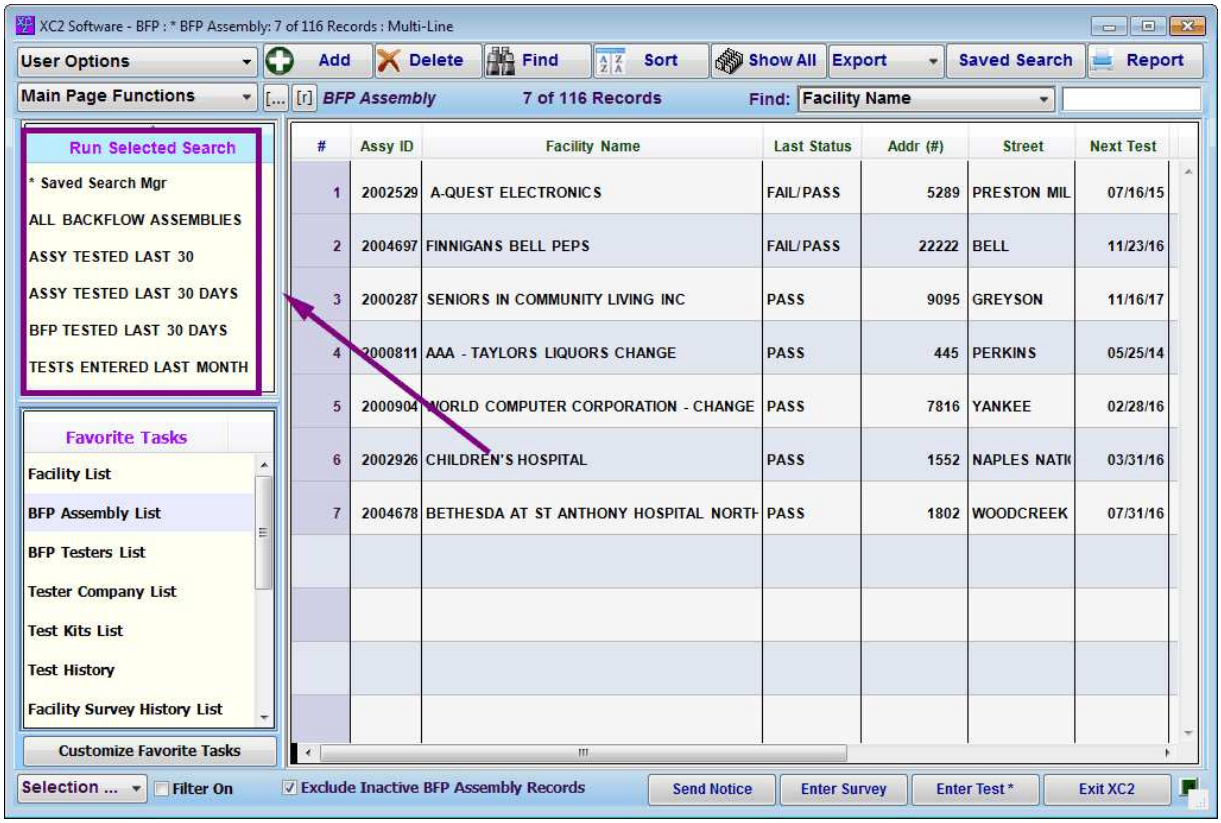
This page describes how to create a query (Saved Search) that can be performed over again without re-configuring.

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 specifc set of information multiple times.

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

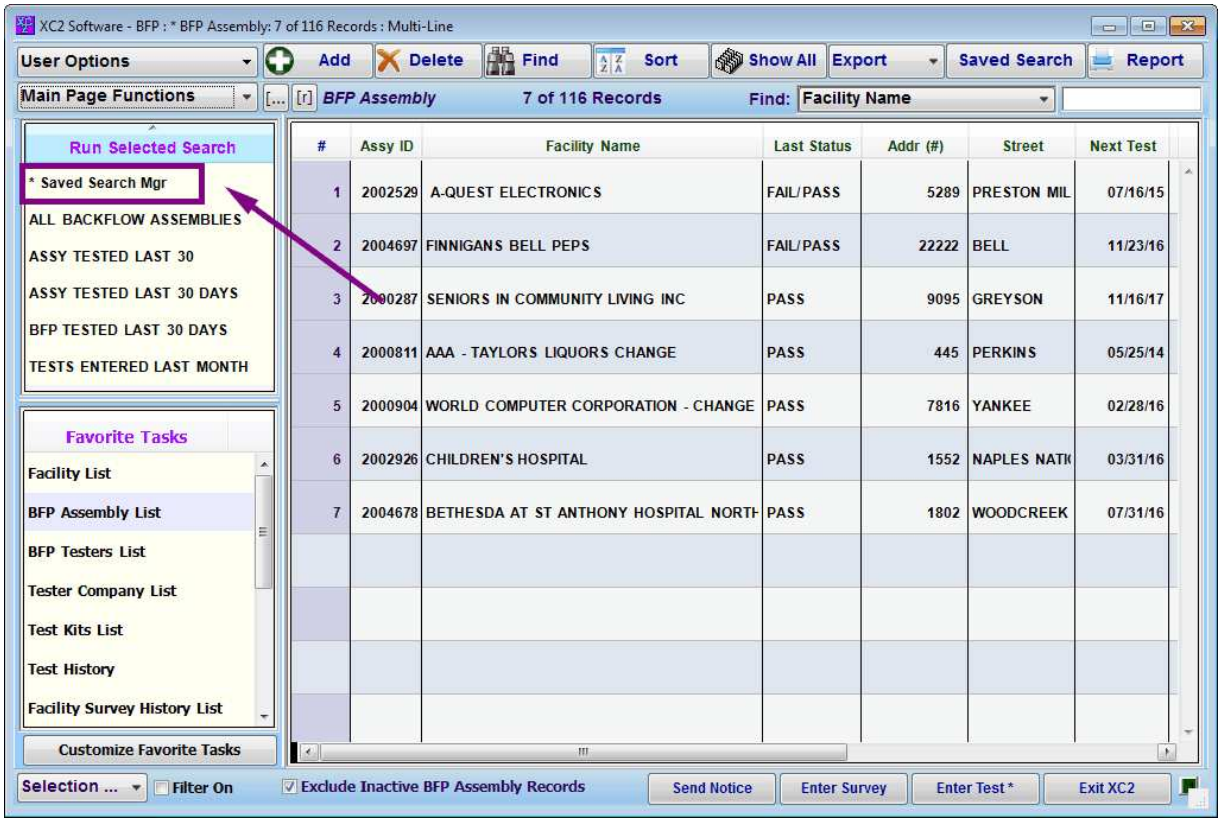


Notes:

Saved Search Manager

In the Saved Search screen

Click the Saved Search Manager

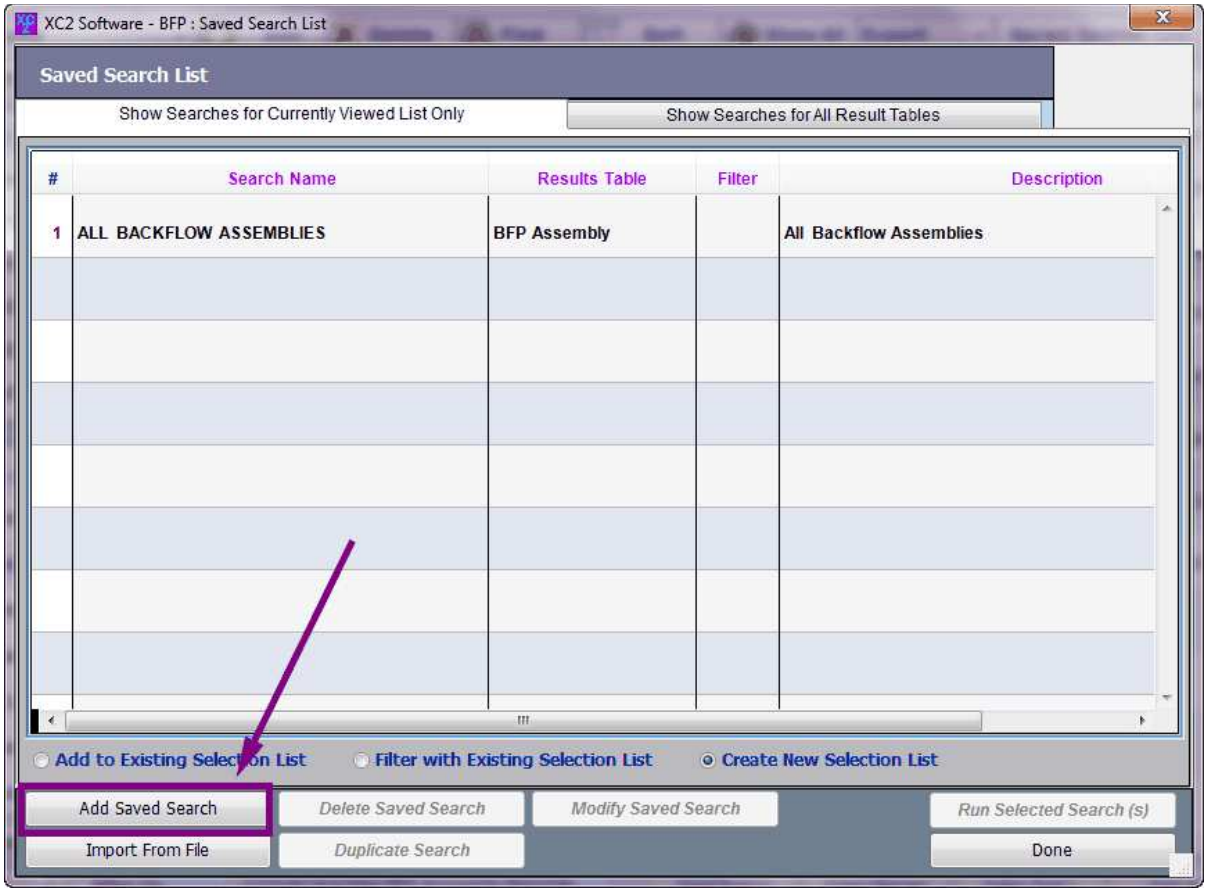


Notes:

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.



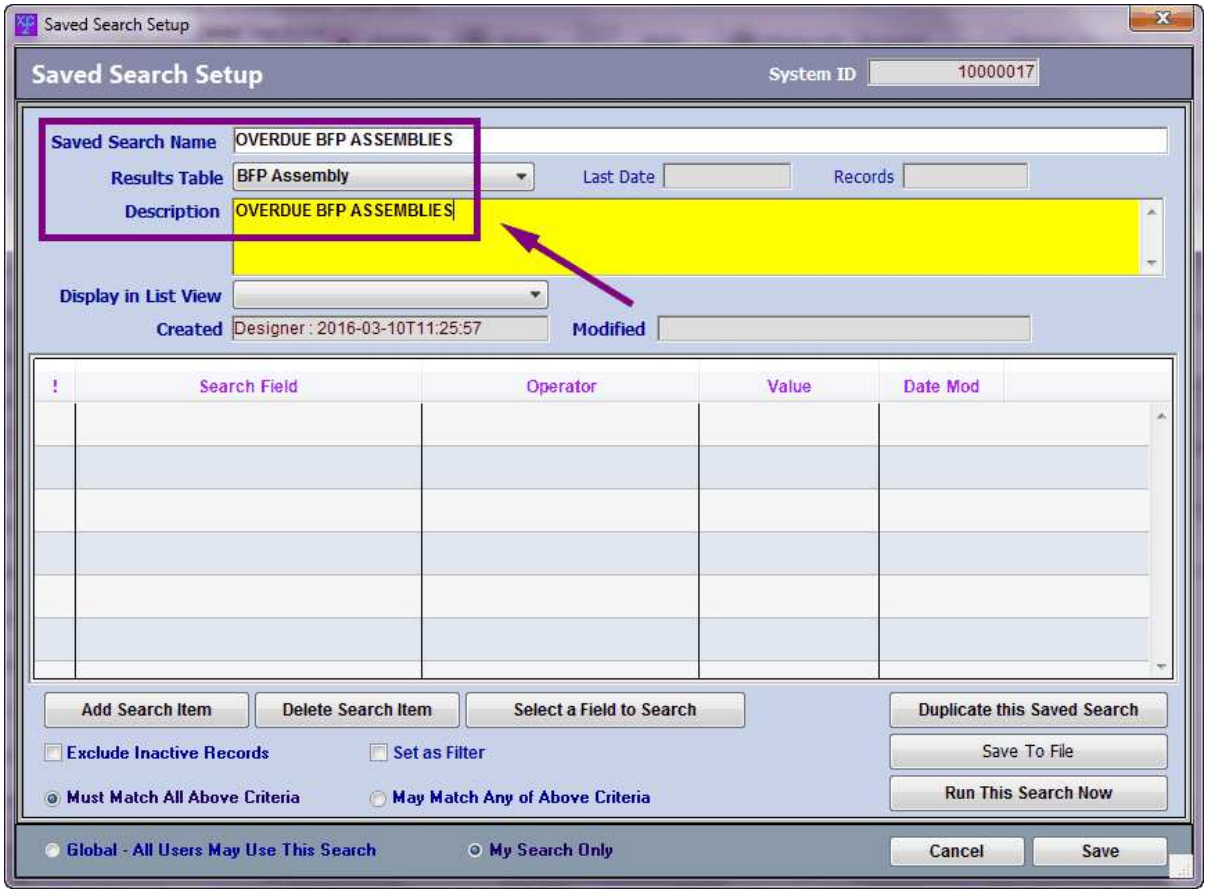
Notes:

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.

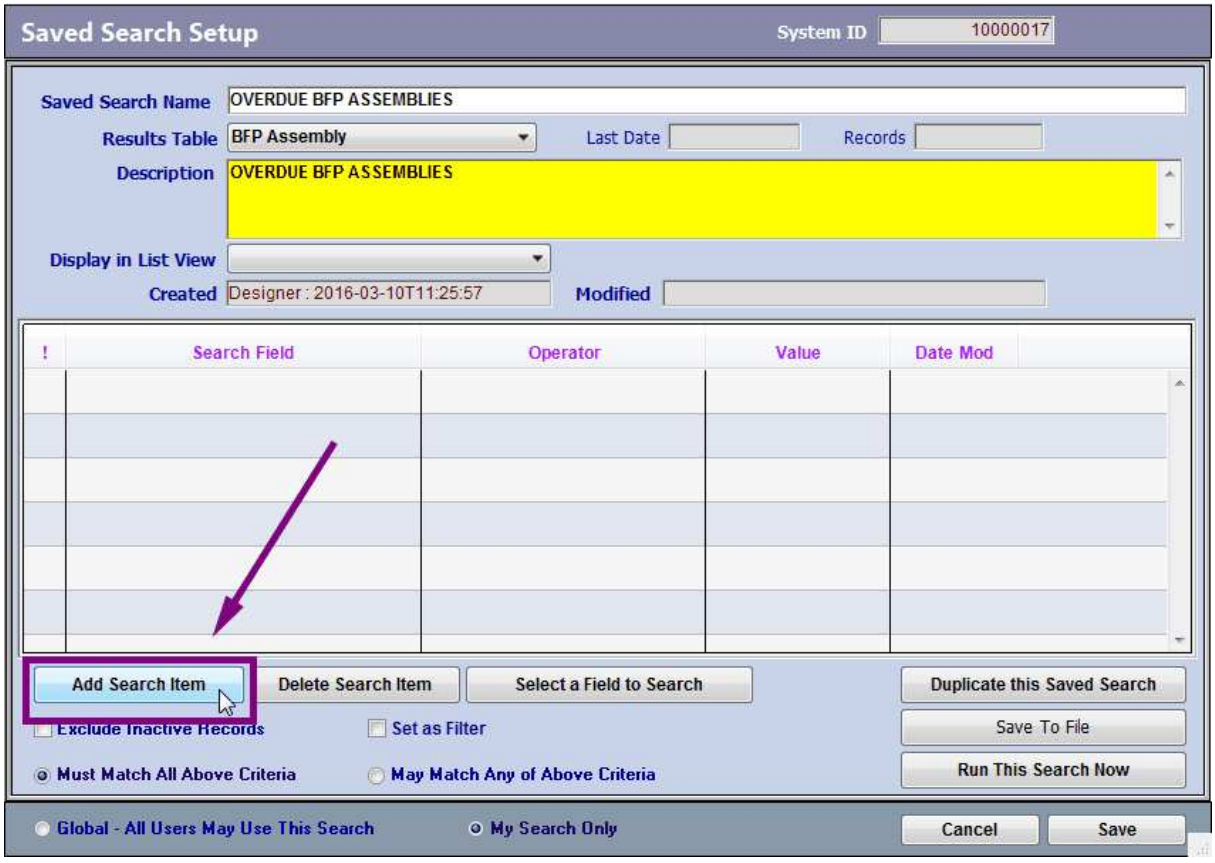
Description: by default, the description of the search will be the name of your search. You can change the description by typing into the description box.



Notes:

Add Saved Search Item

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

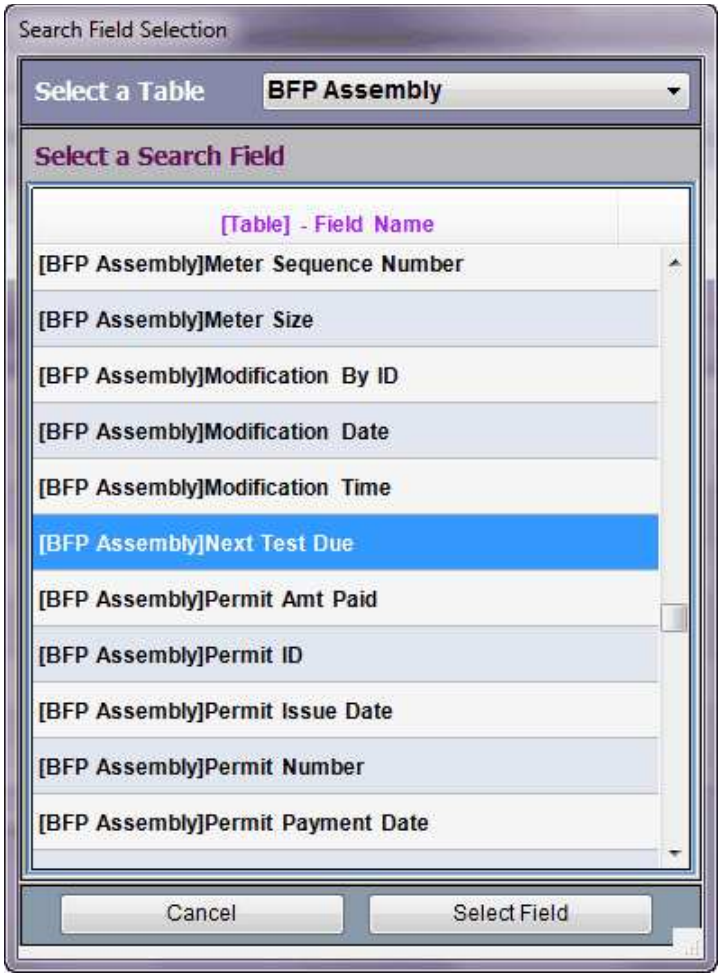


Notes:

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

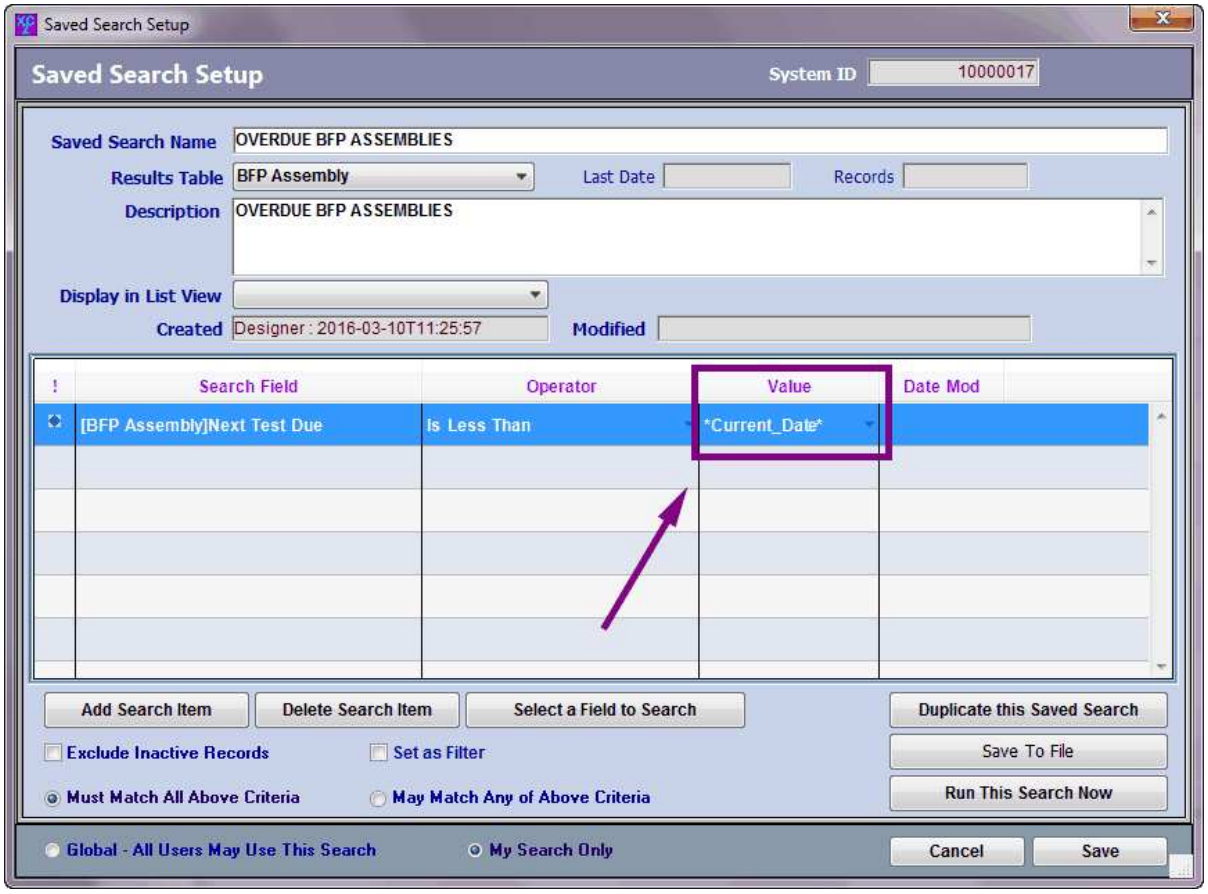
Next choose one of the items in the "Operator" dropdown.

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

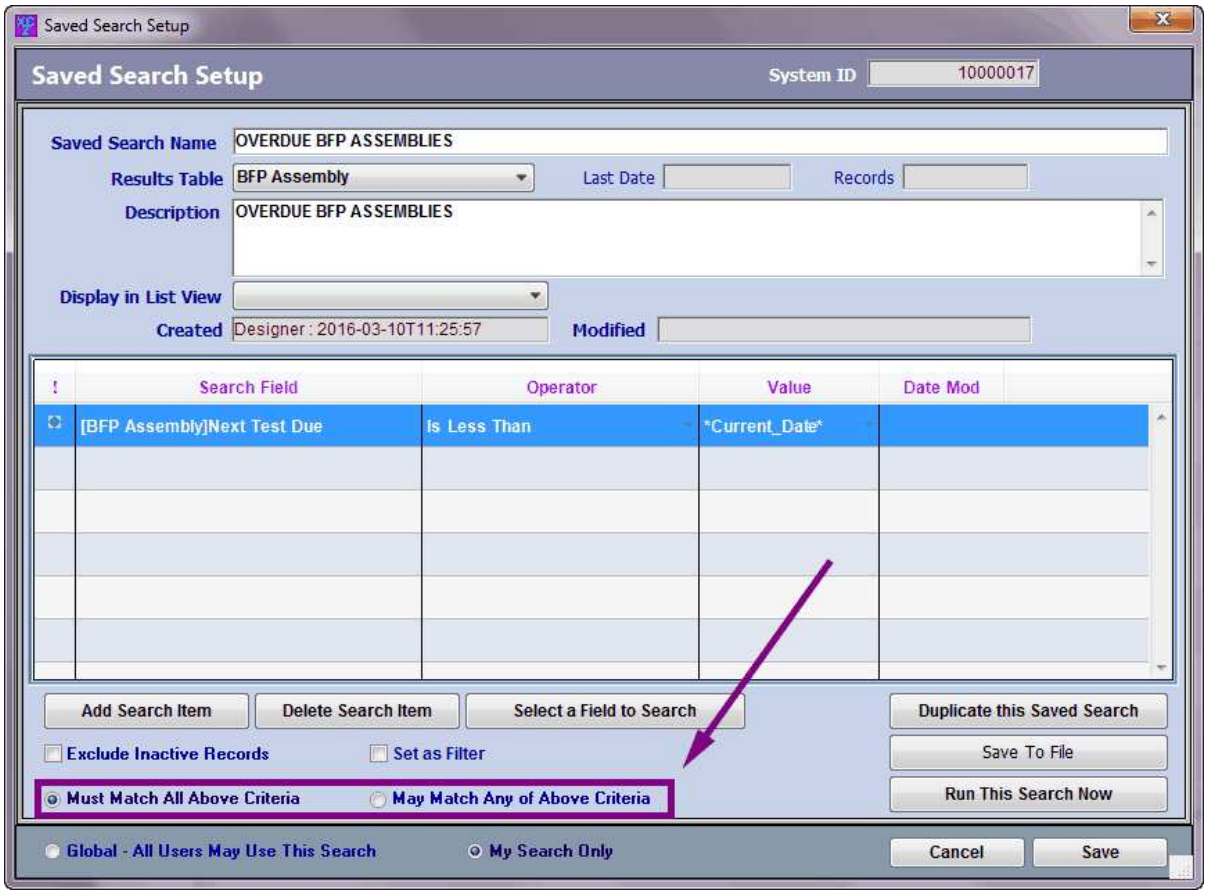
Note: If the field in XC2 is a checkbox, type True in the value box for when the box is checked and False if it is not checked.



Notes:

Multiple Search Parameters

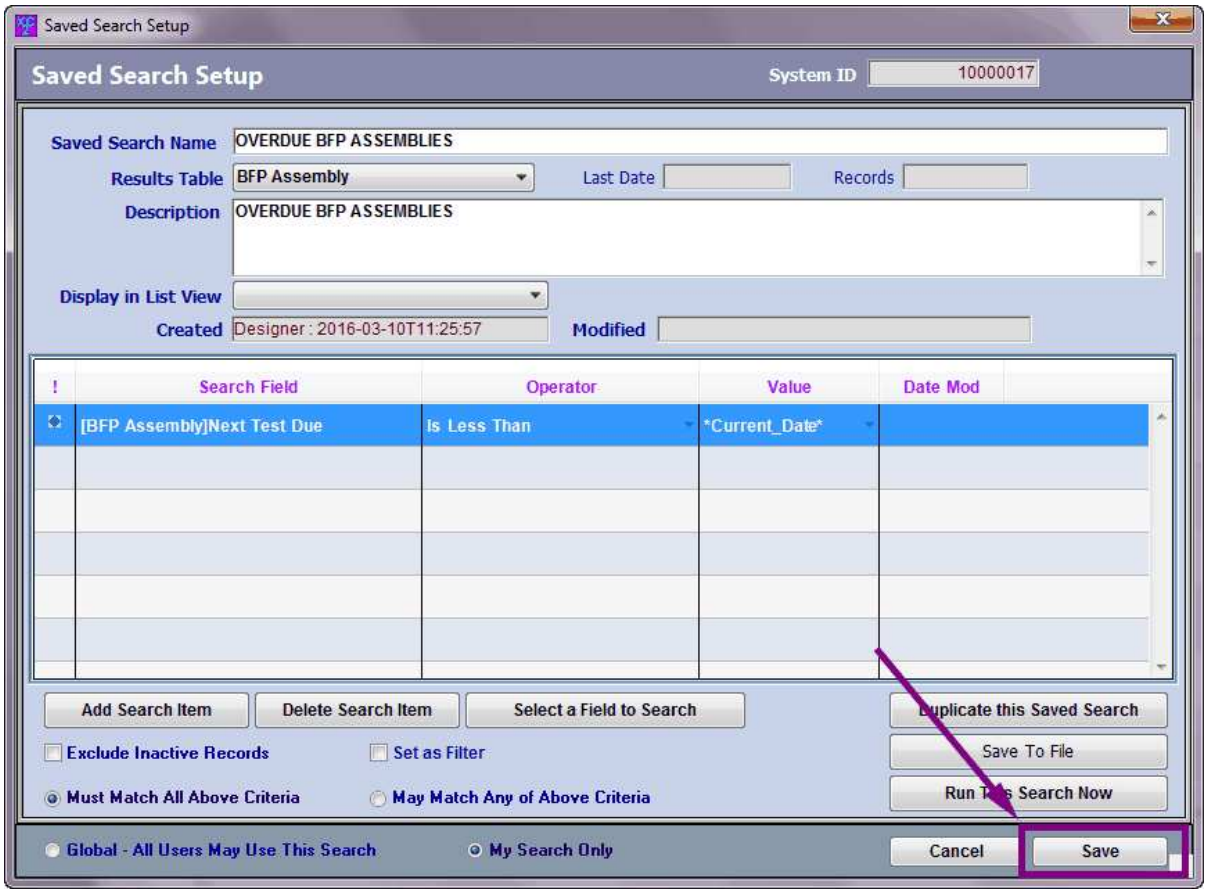
If you have multiple search parameters, you can choose to have the results match all parameters or any of the listed parameters.



Notes:

Save Your Search

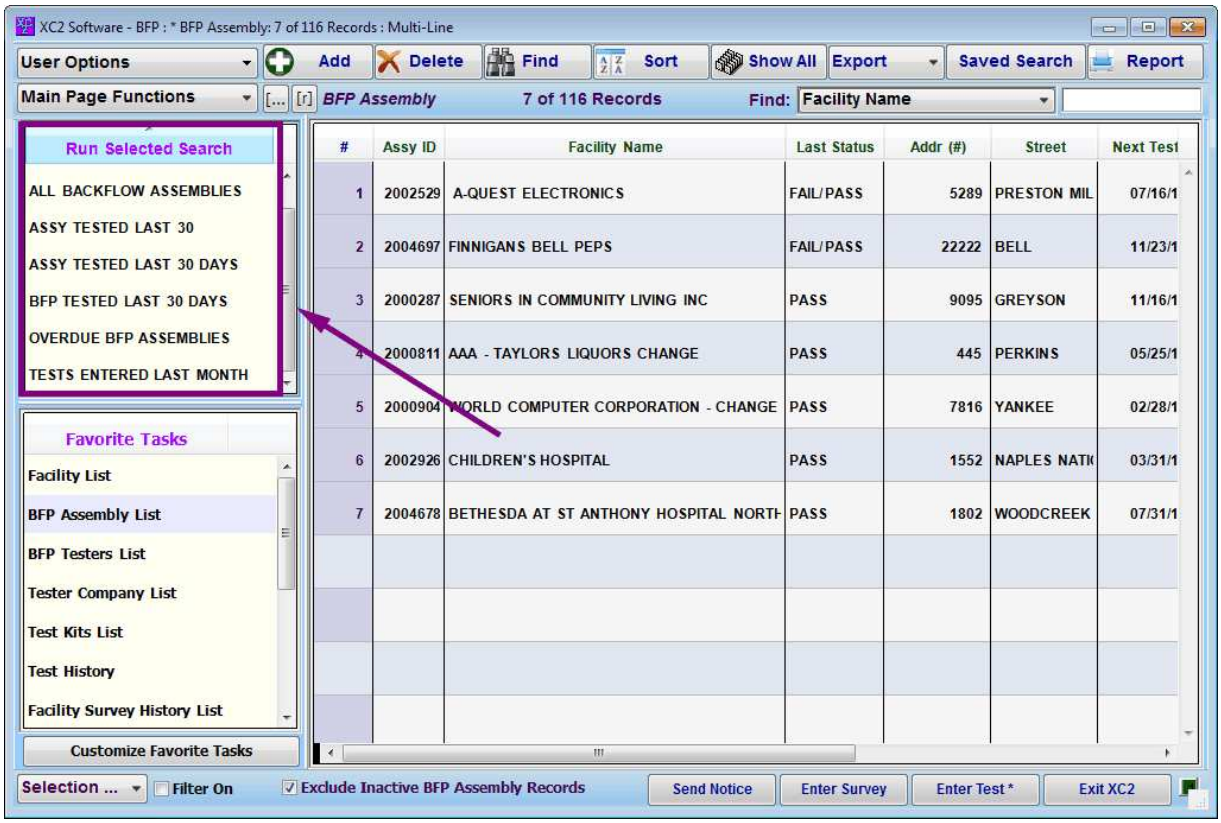
When you are finished creating your saved search, save the search by clicking Save.



Notes:

Saved Search Buttons

All Saved Searches will be available on the main page.



Notes:

XC2 Software Knowledge Base

Advanced Search Settings

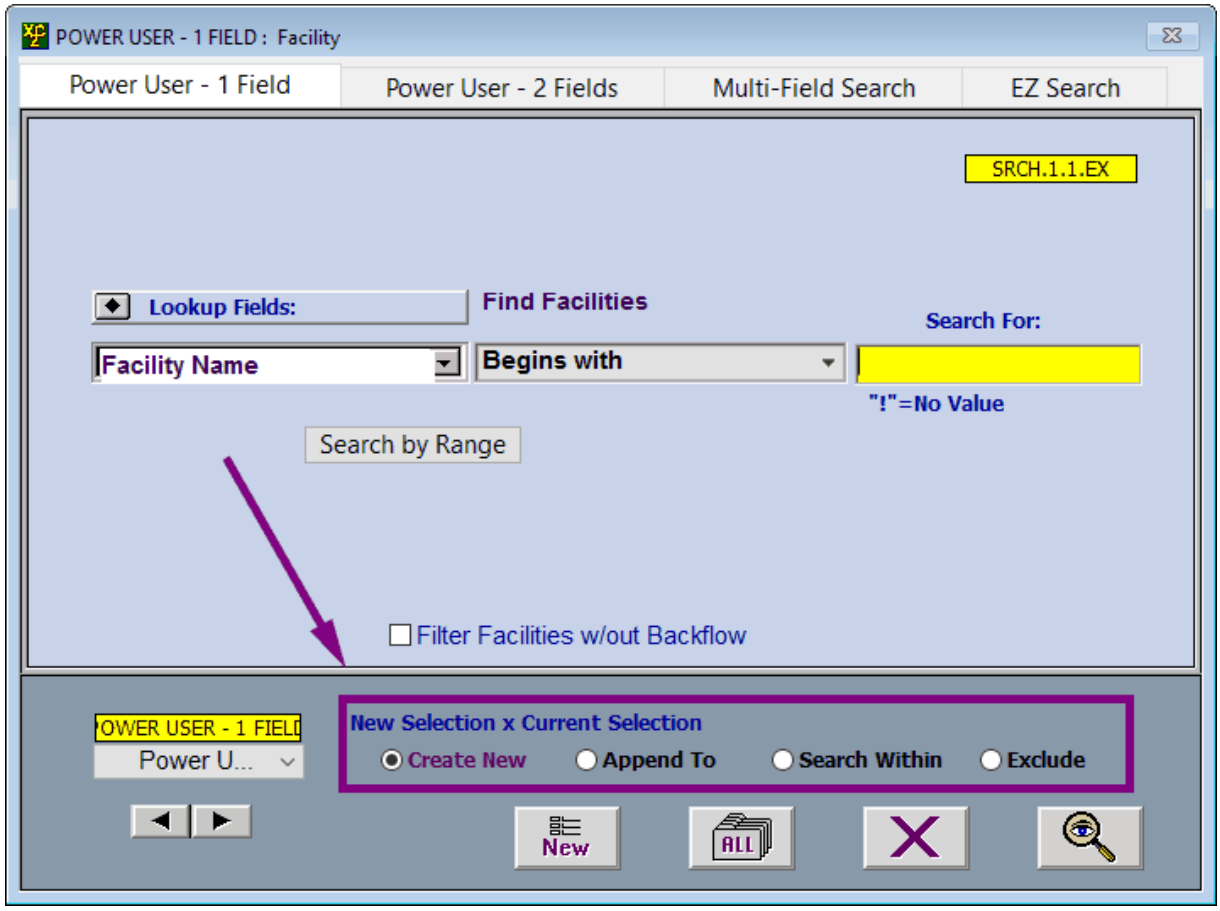
KB Asset ID: 3628

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

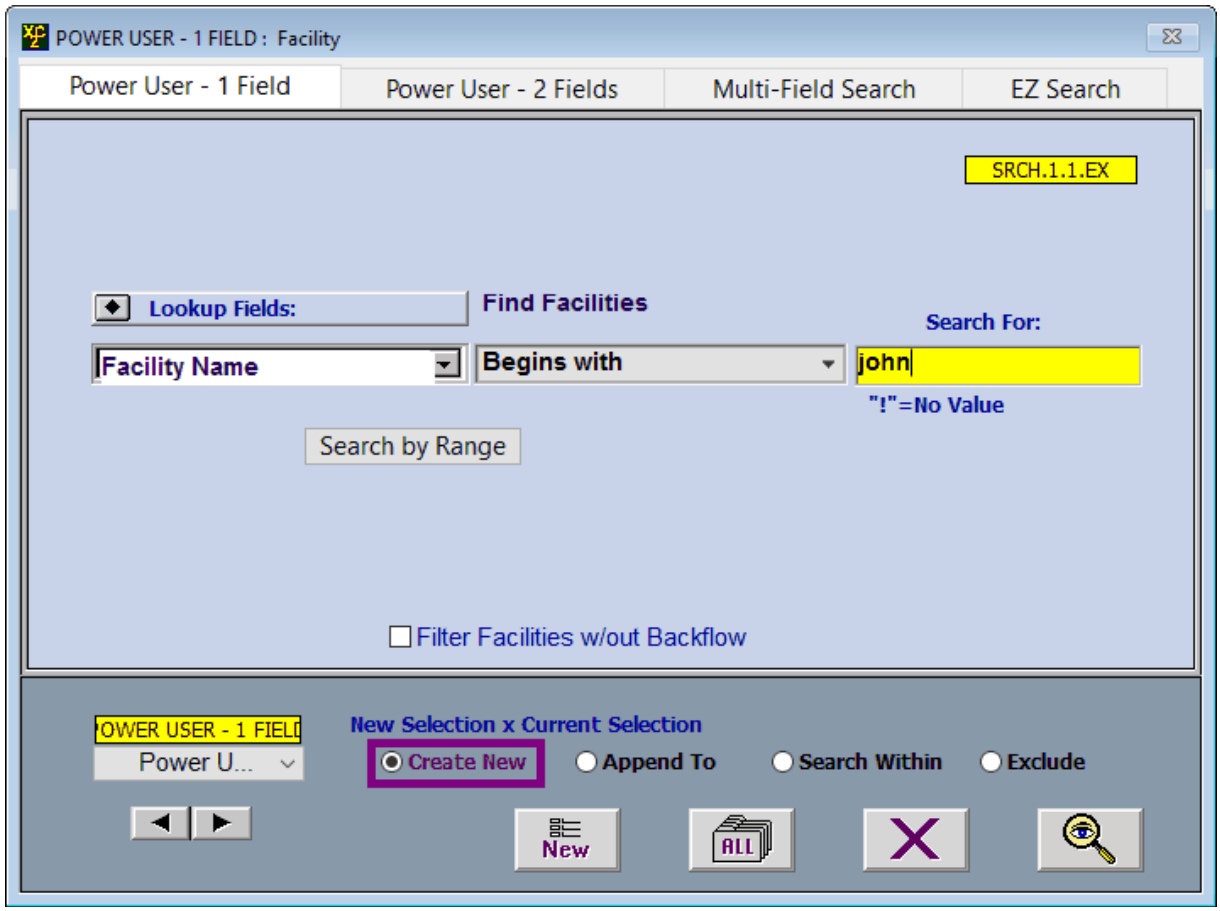
other than create new, these other search options are for modifying an existing list



Notes:

Create New

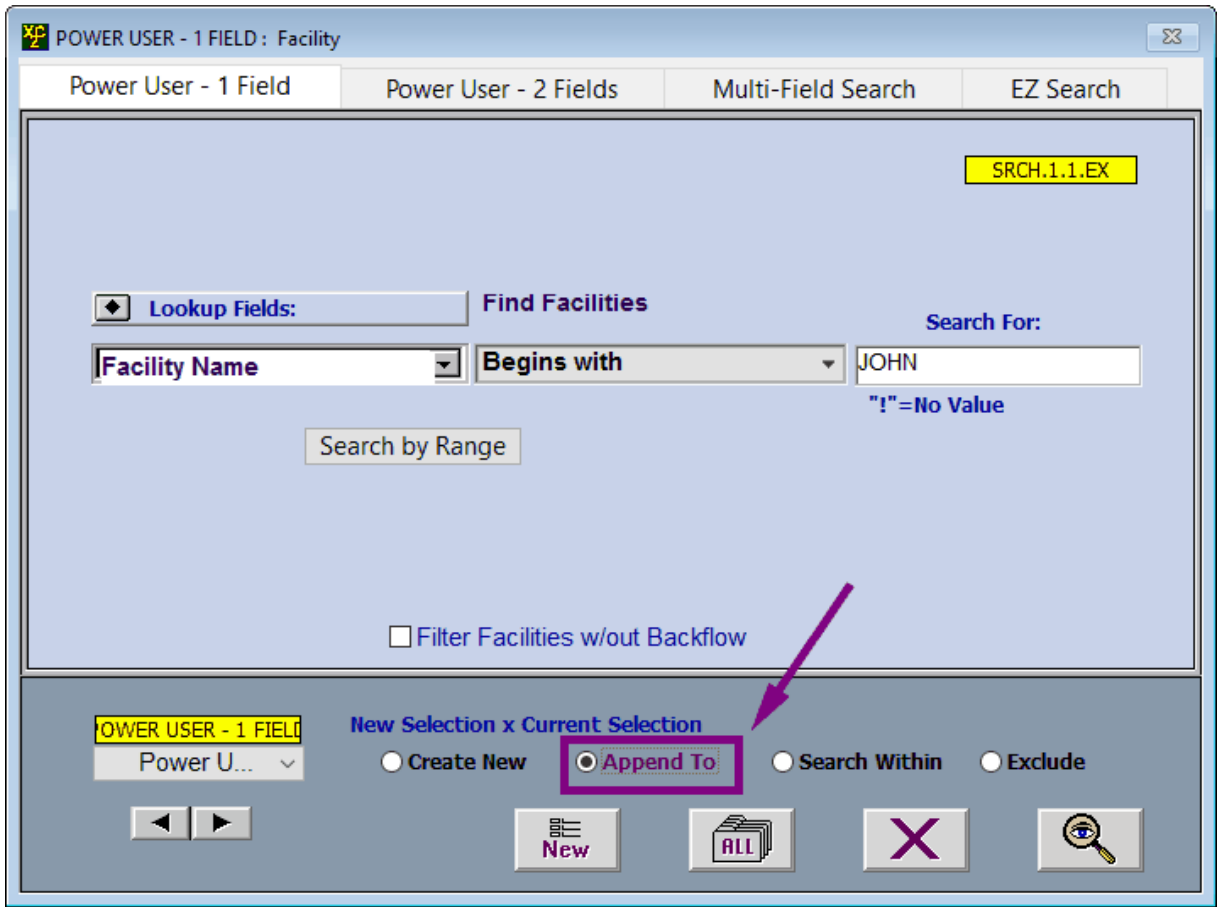
This will create a new list of records. This is the standard search option



Notes:

Append To

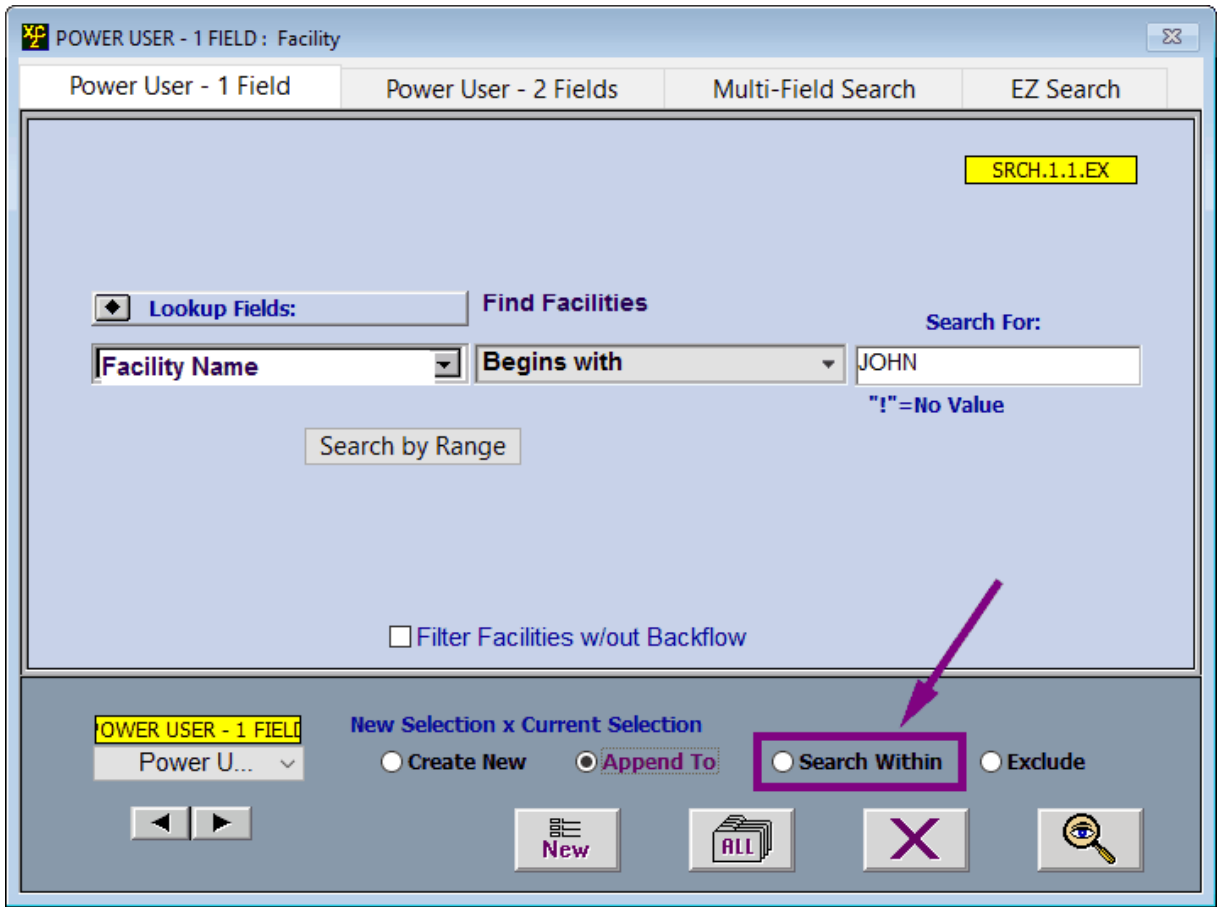
This option will add records to an existing list.



Notes:

Search Within

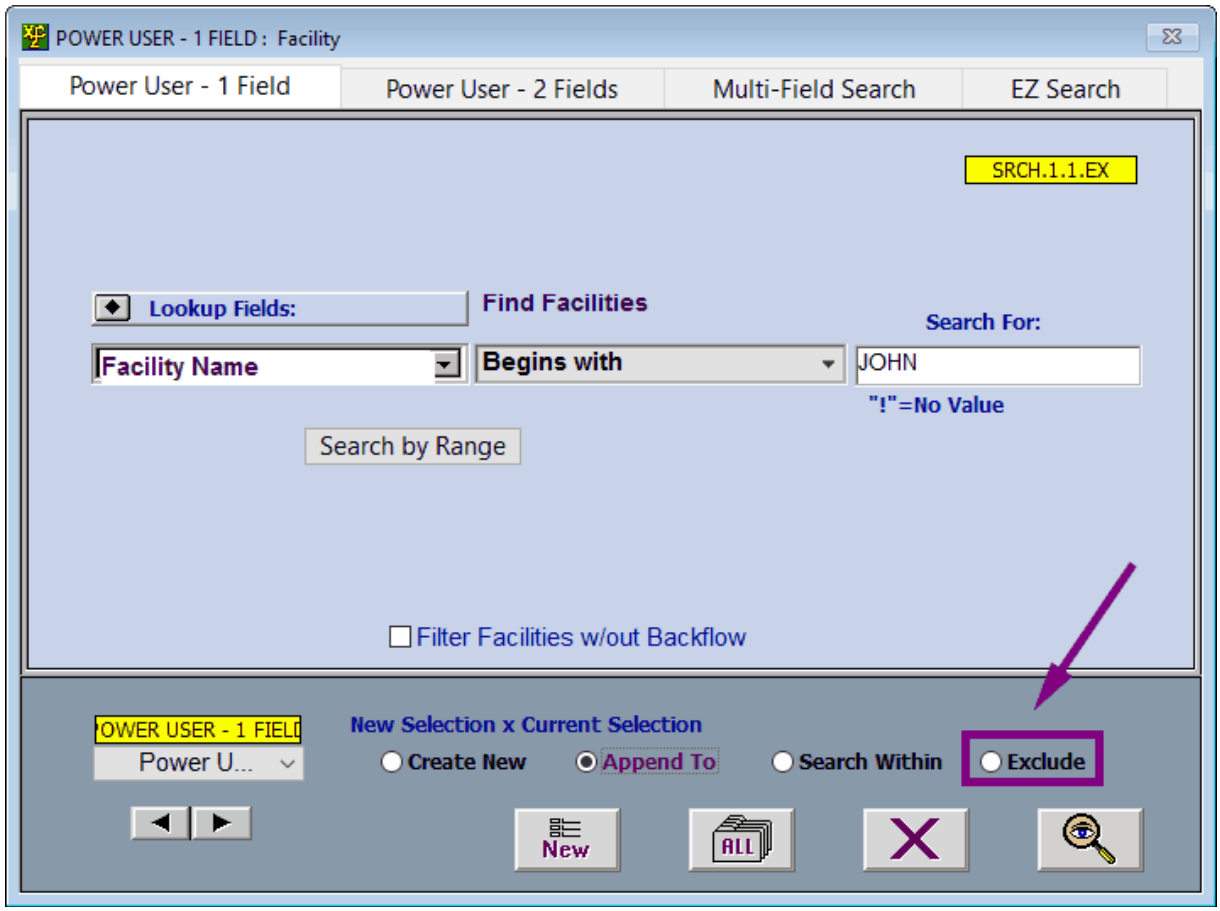
This option will only search through your current list of records



Notes:

Exclude

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



Notes:

XC2 User Manual
Facilities

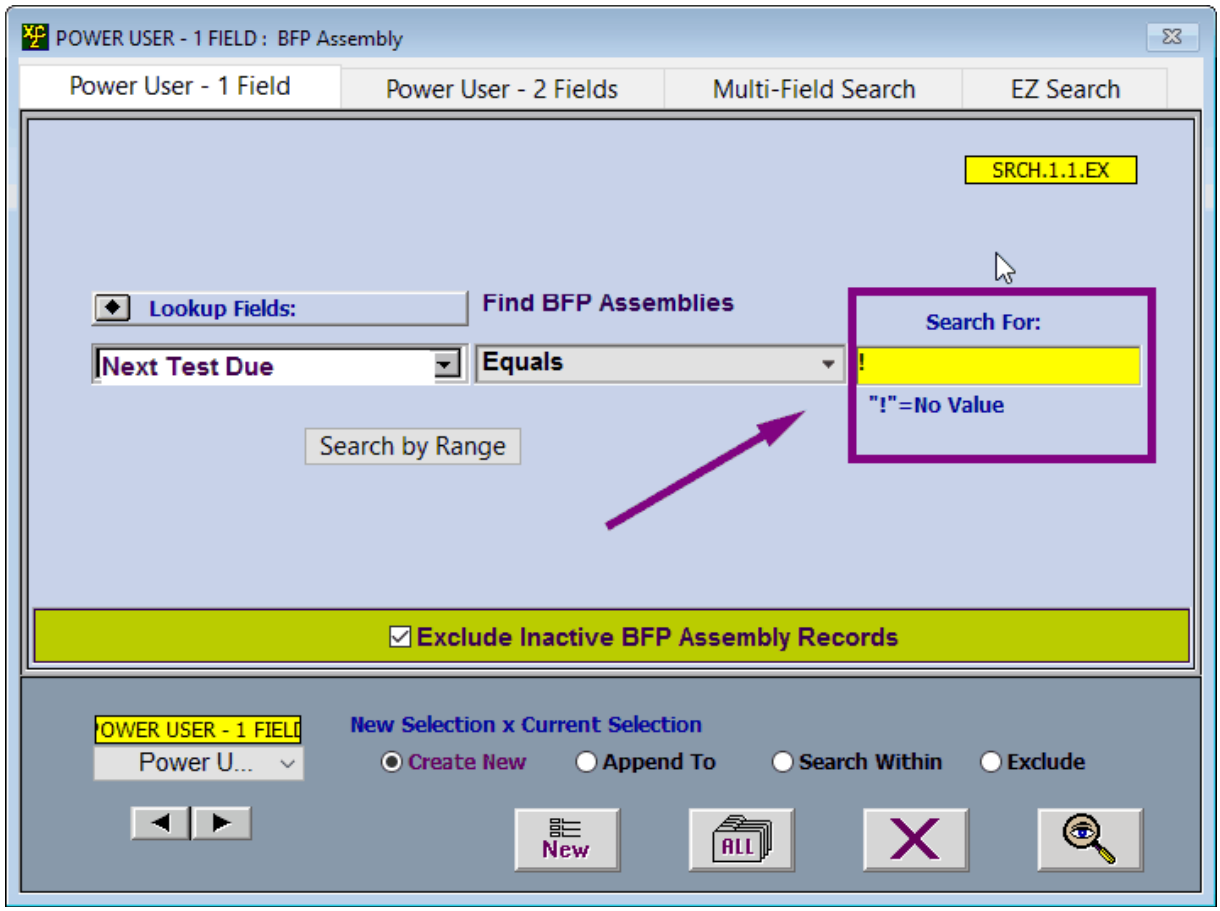
- What Is a Facility Record
- Facility Screen Overview
- How to Create a New Facility Record
- How to Edit Existing Facility Record
- Facility Address Options
- Adding Pictures to a Facility Record

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

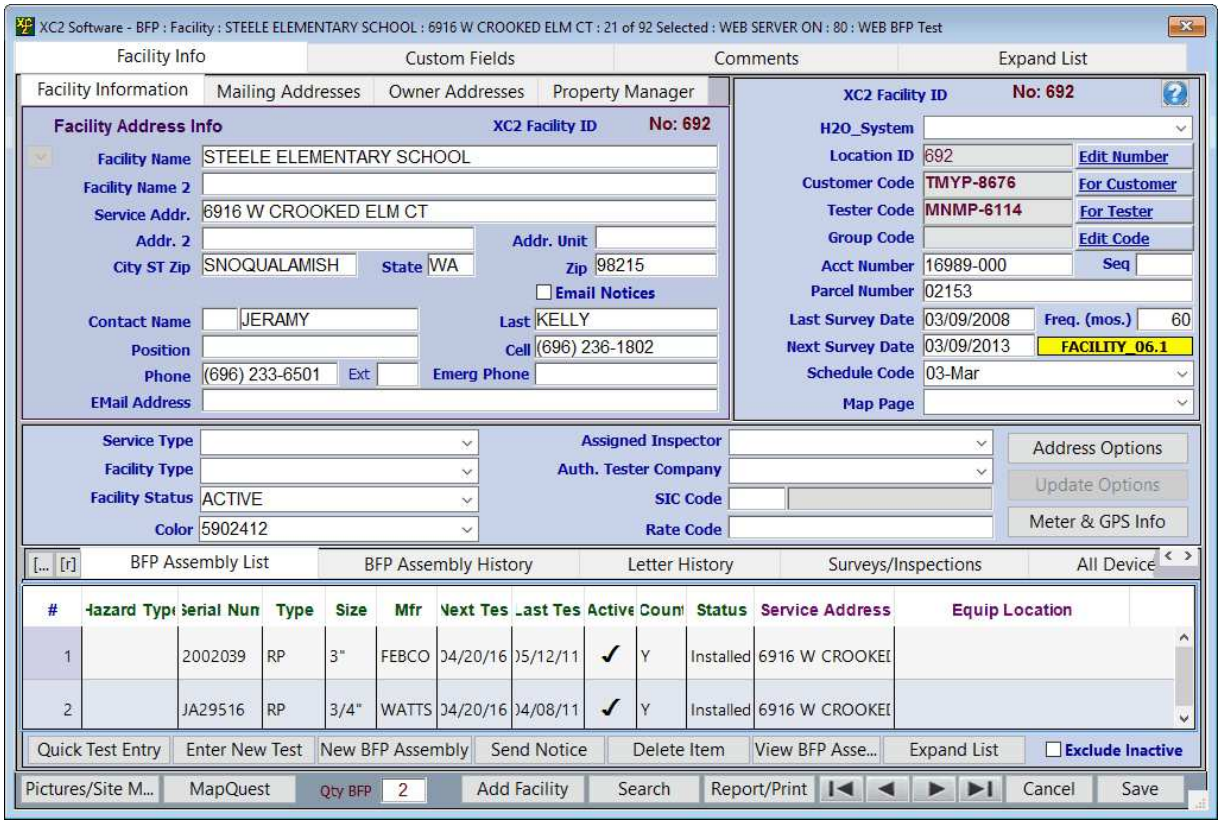
What is a Facility Record?

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 assemblys 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



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

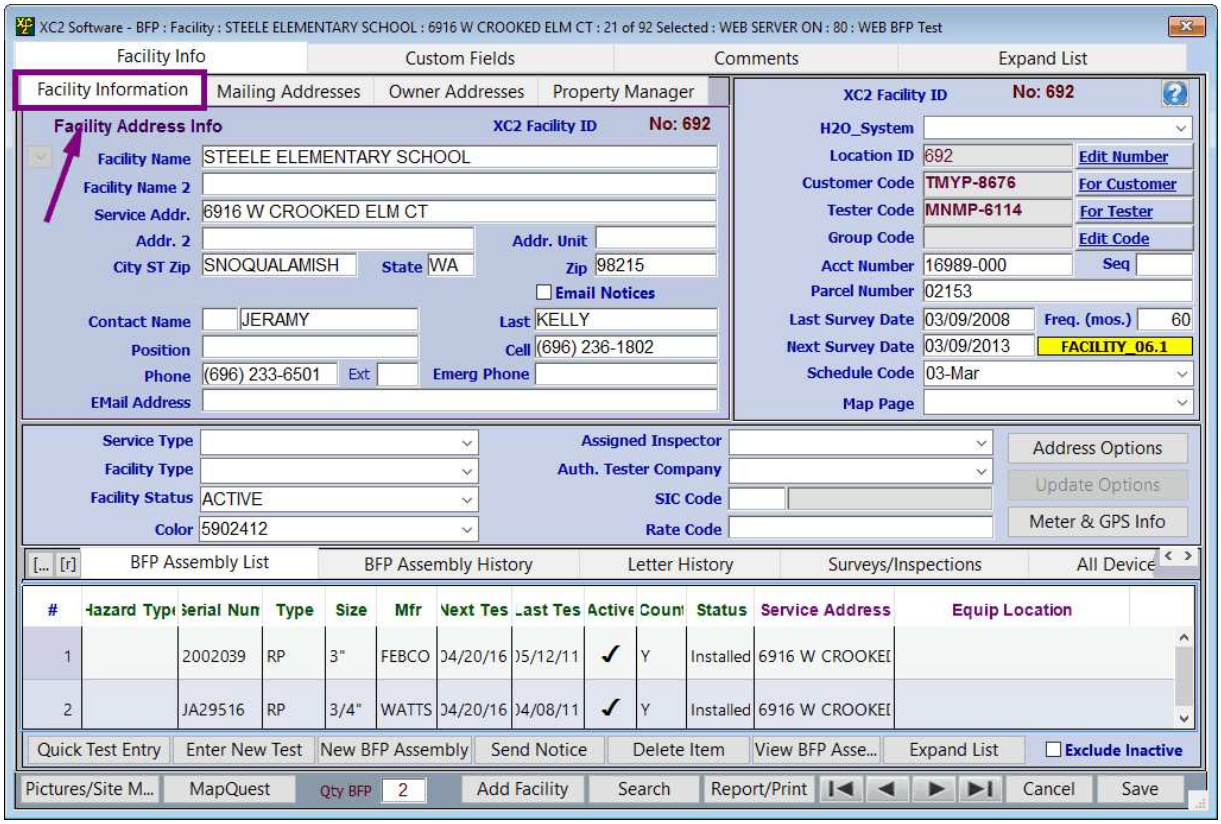
The Facility Service Information is located within it own Tab in the Top Left Corner.

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



Notes:

Mailing Address

Facility Mailing Address

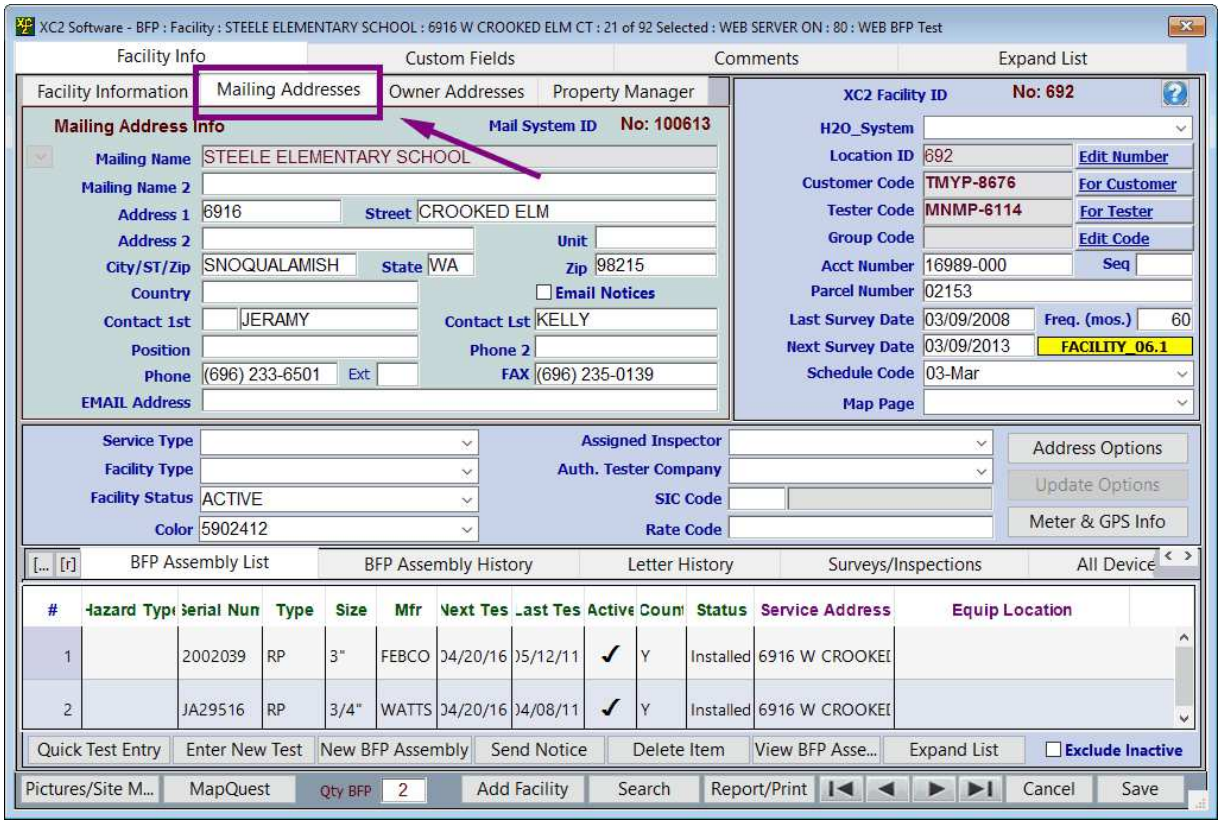
Each Facility can have its own mailing adress that is seperate from the service information

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

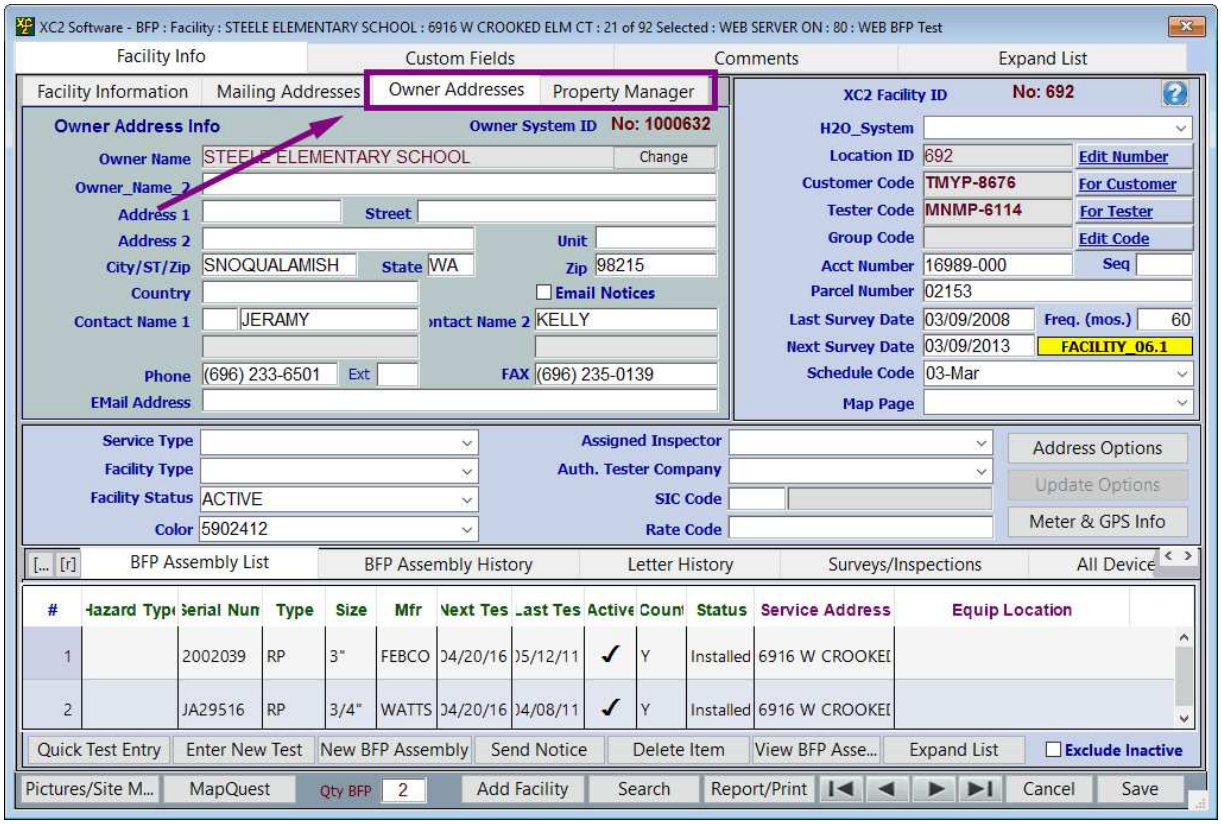
You can have two other types of address information in a Facility Record as well

Owner Address and a Property Manager

The Owner Address is the person who owns the building

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

Both Address Tabs are Seperate and can hold individual address information



Notes:

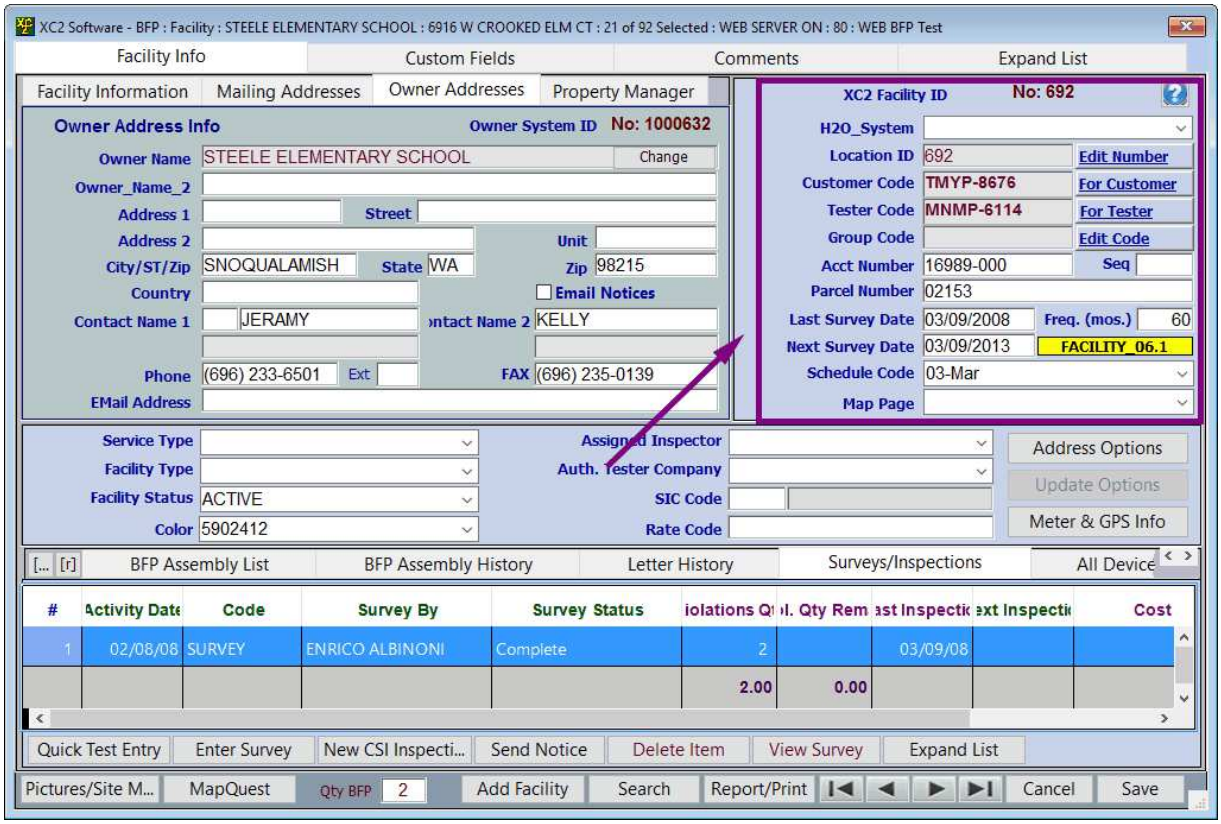
General Facility Information

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

This information includes

Survey Date History
Account Number information
Location Id's

All of this information is specific to the facility record

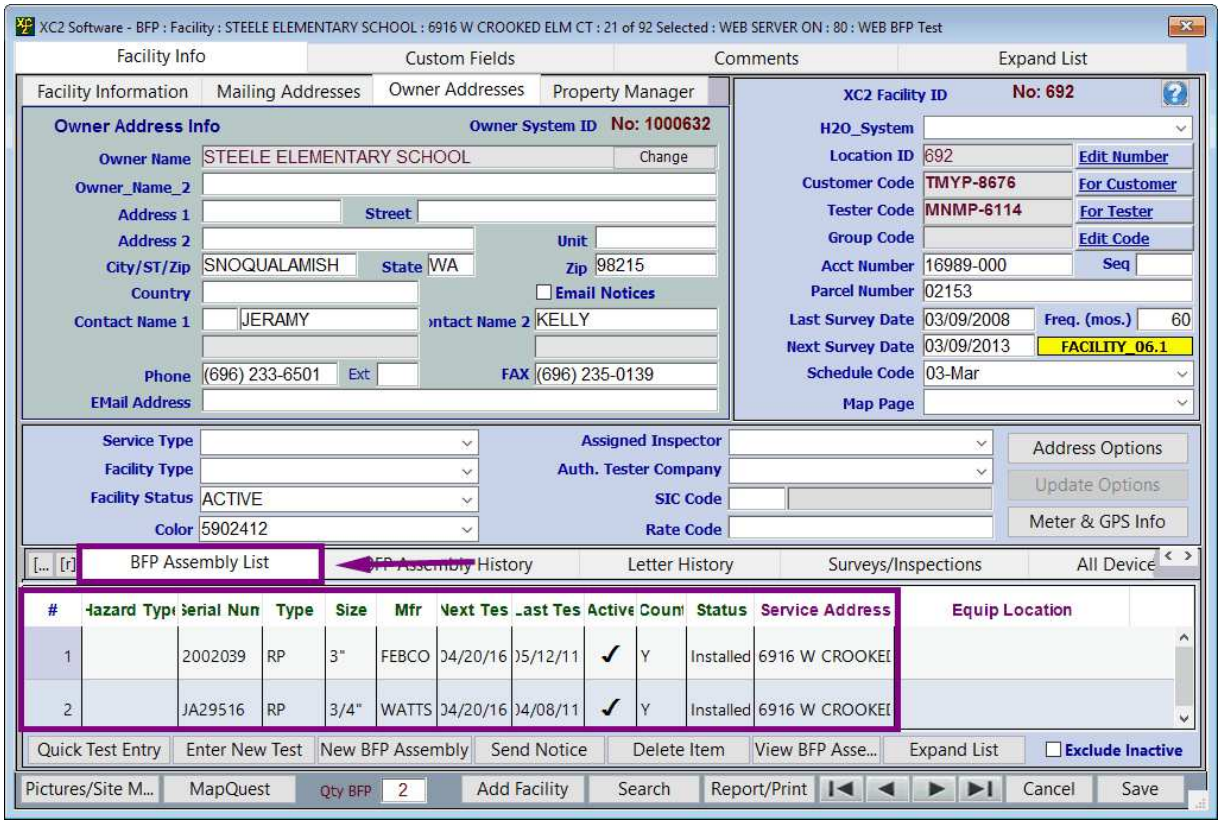


Notes:

Facility Assembly List

The default tab at the bottom is the Faciliyt Assemby List

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

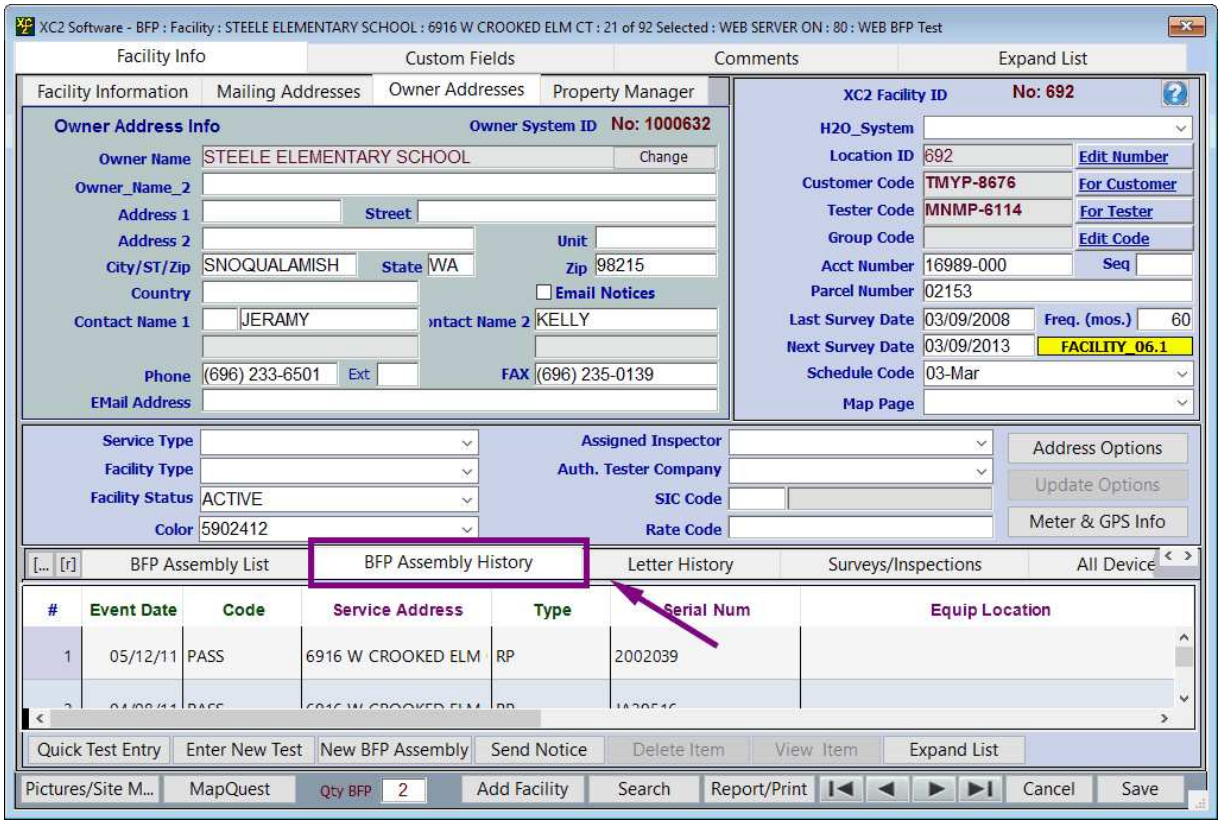


Notes:

BFP Assembly History

The BFP Assembly History Can be Accessed from the Facility List

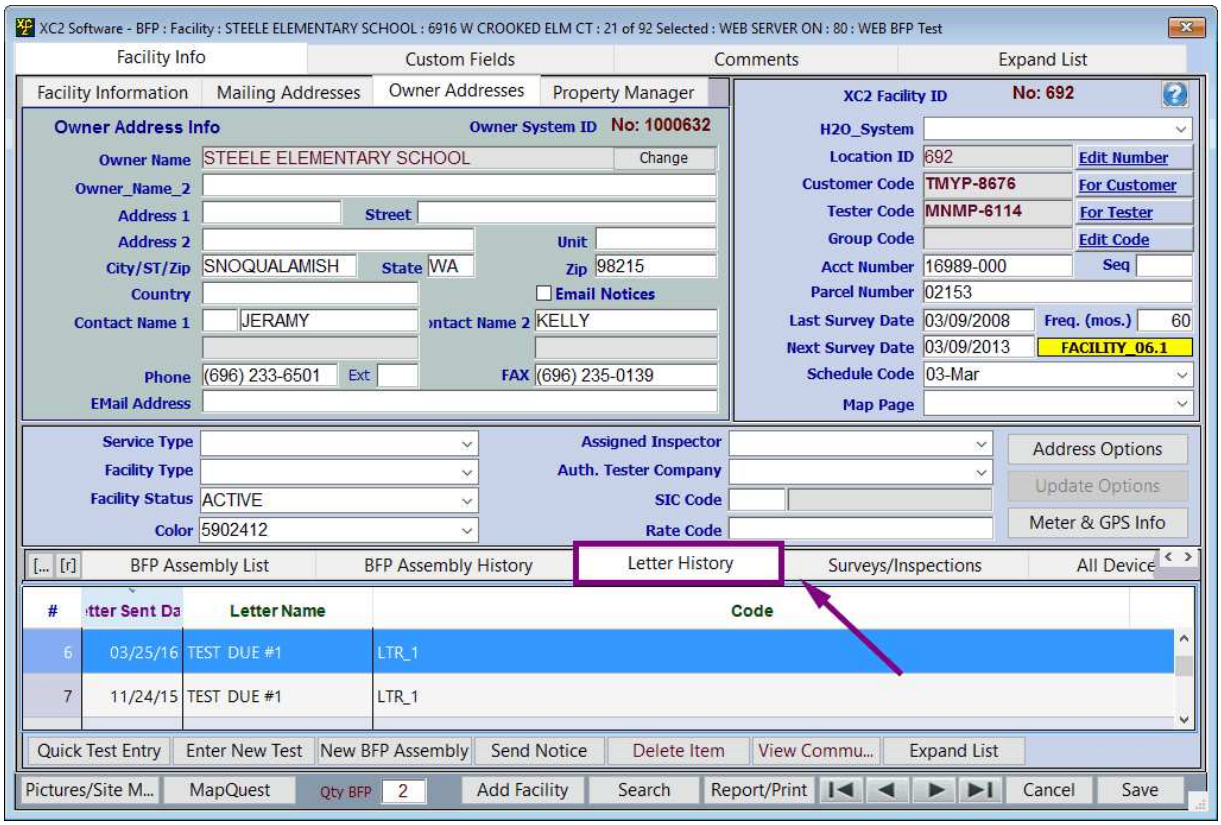
The History Tab will display all tests, repair, replacement or installtion record entered for each Assembly



Notes:

Facility Letter History

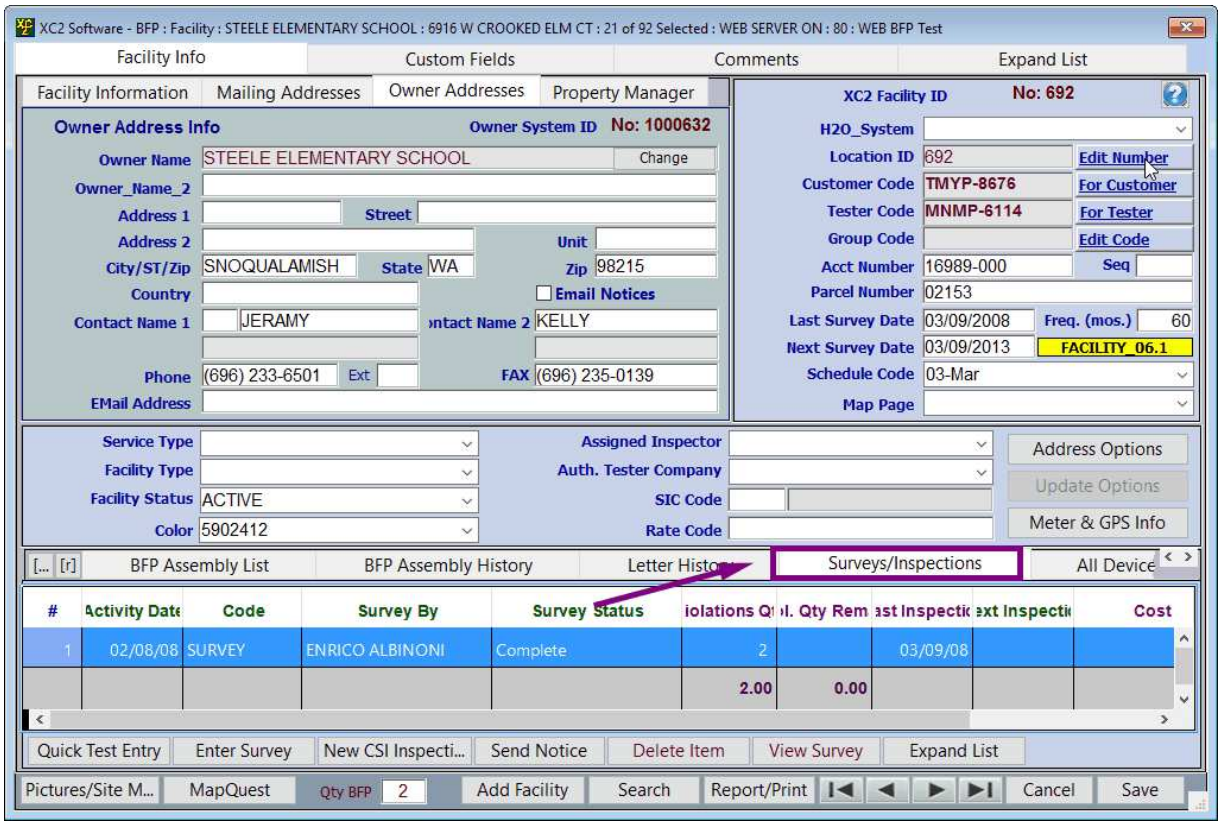
You can access All facility Letter history from the faciltiy page



Notes:

Survey History

You can access past survey information from the Facility Screen



Notes:

XC2 Software Knowledge Base

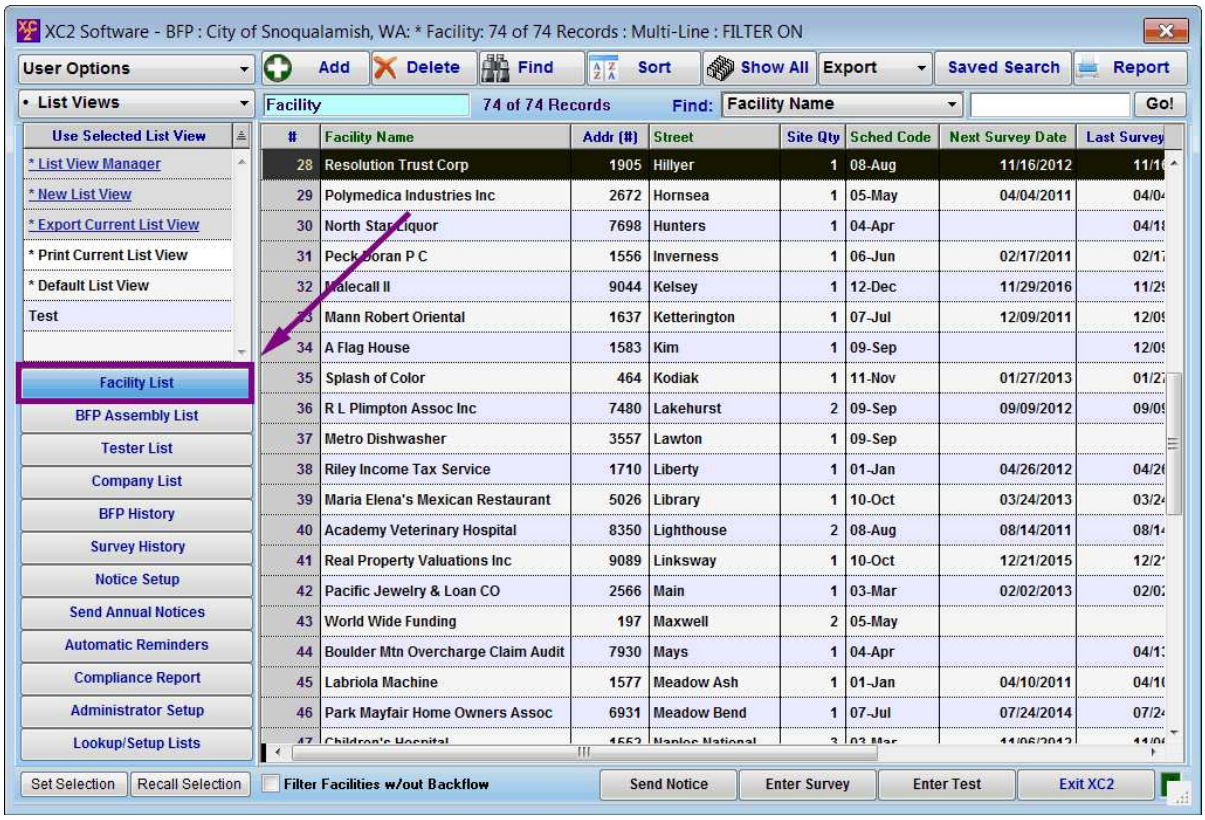
How to Add A New Facility

KB Asset ID: 24

How to Add a New Facility Record in XC2

Facility List

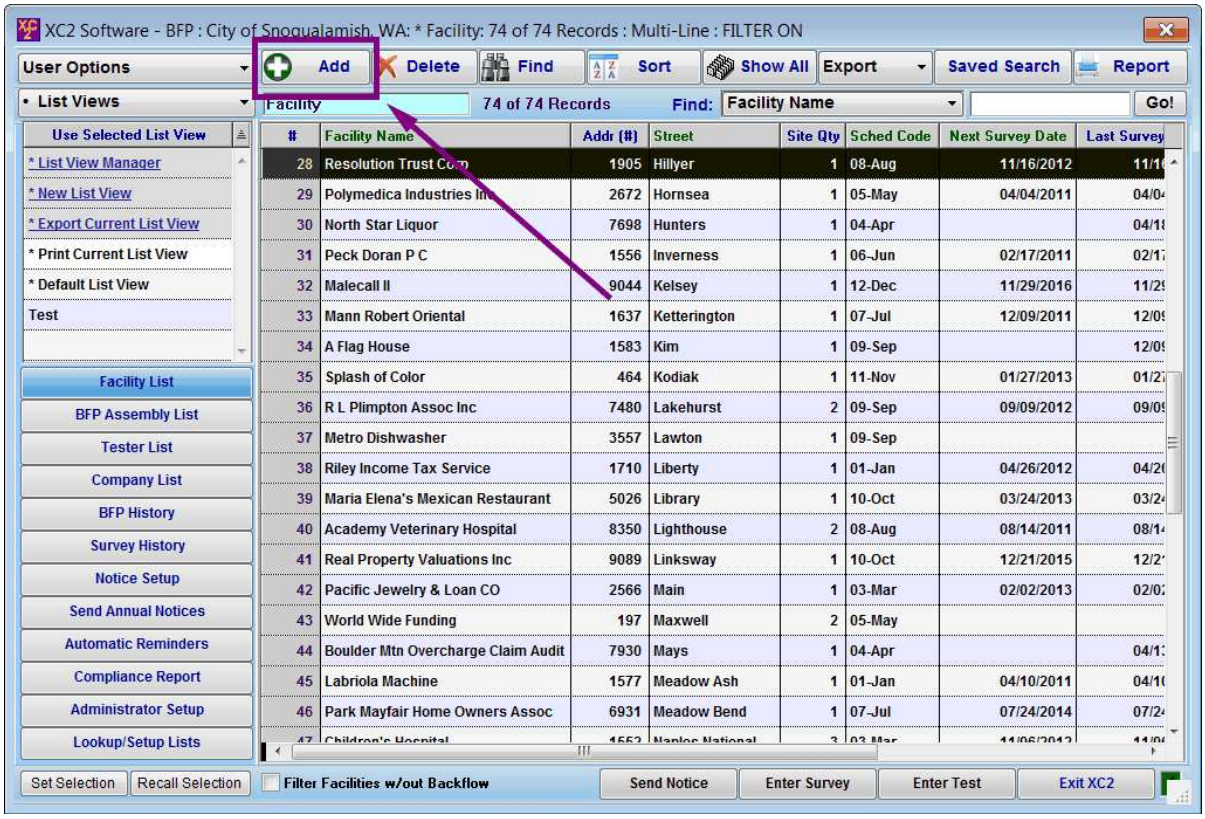
From the Main Screen, Click the Facility List



Notes:

Adding a Facility Record

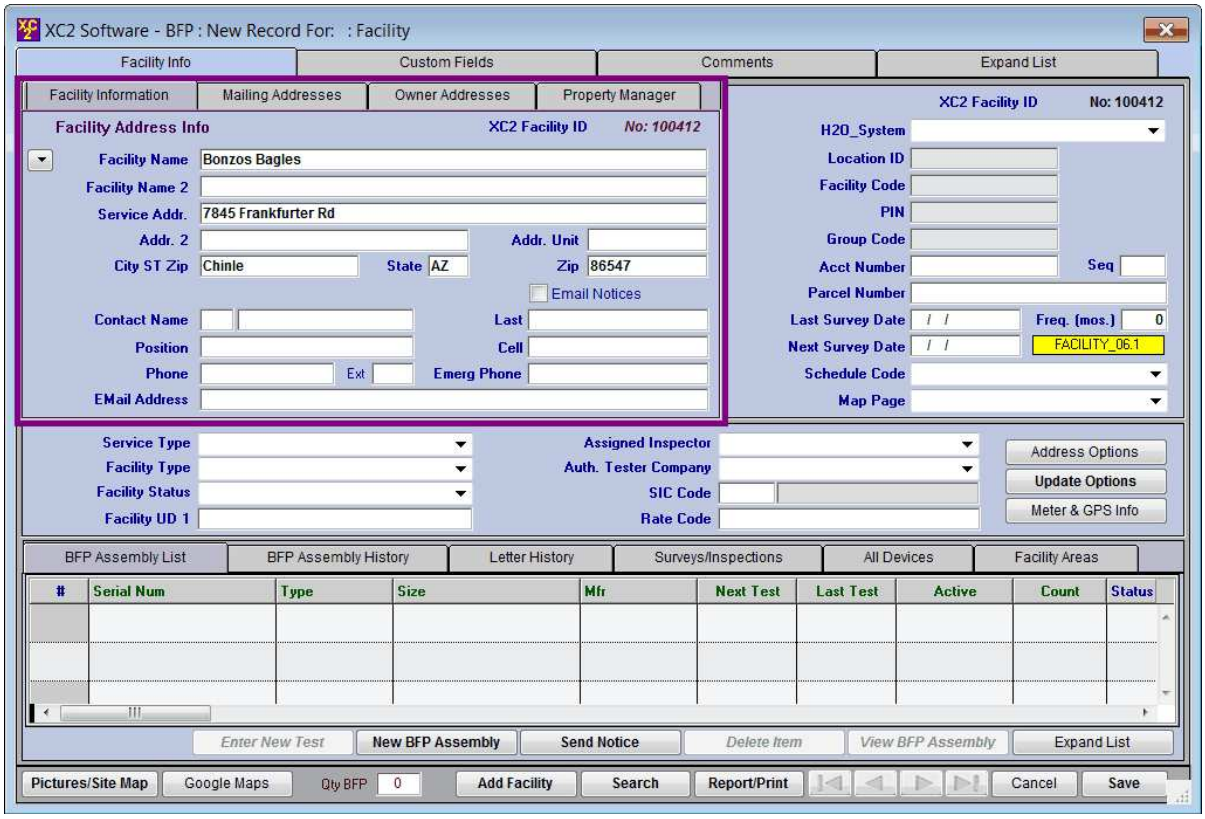
Click the Add Button on the top left of the Screen



Notes:

Enter Facility Information

Type Facility Service Information into Facility Information



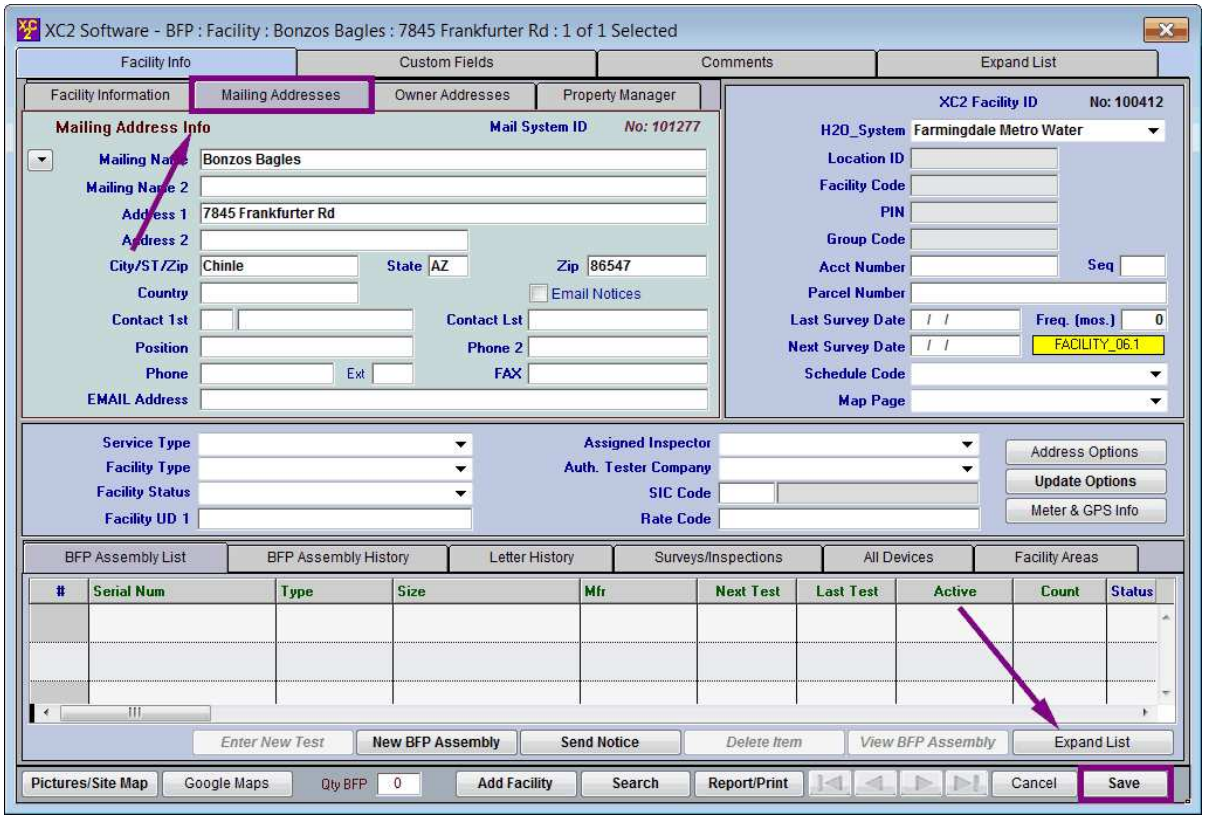
Notes:

Confirm The Mailing Address

Click on the Mailing Address Tab.

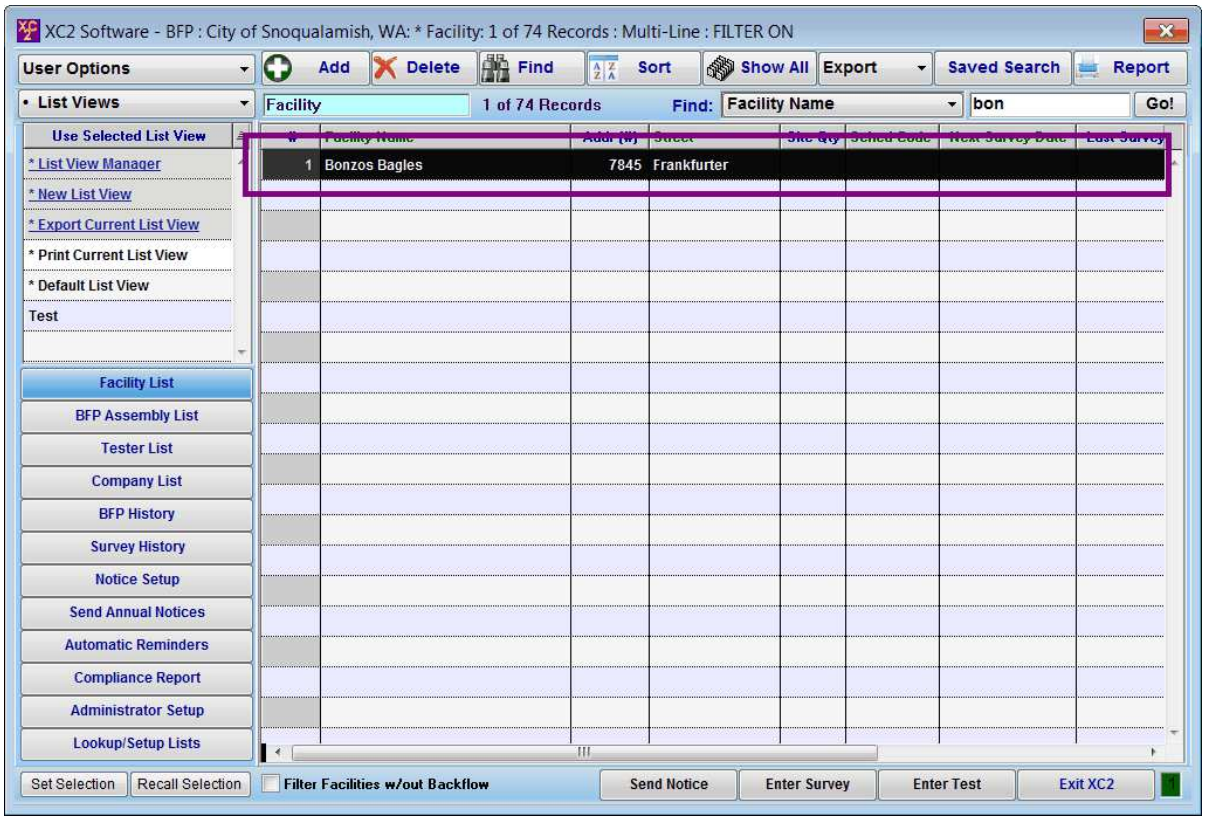
By Default, the Mailing Address will be the same as the Service Address. If you would like the Mail to be Delivered to a different location, change the address information here.

Click the Save Button



Notes:

You have created a New Facility



Notes:

XC2 Software Knowledge Base

How to Edit a Facilty Record

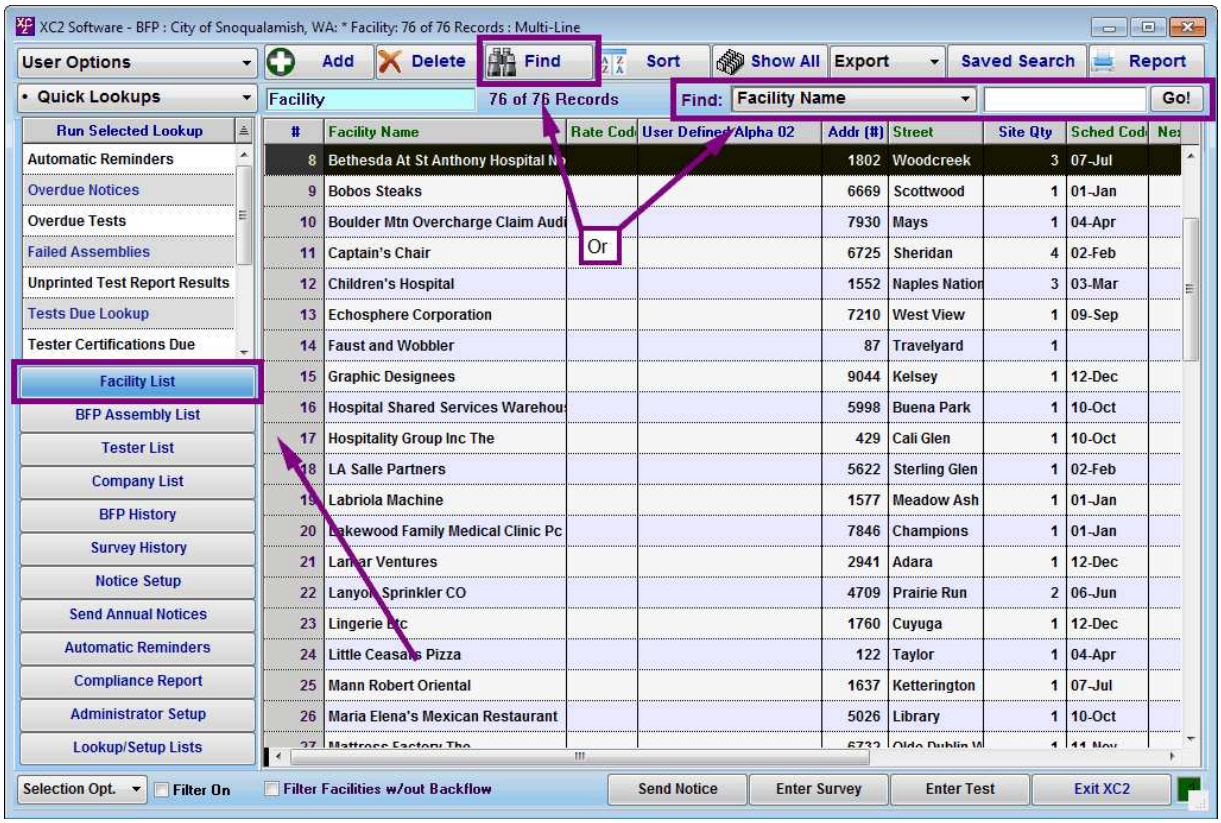
KB Asset ID: 2615

The page describes how to edit an existing Facility record

Search for the Facility

Search for the Facility you wish to edit

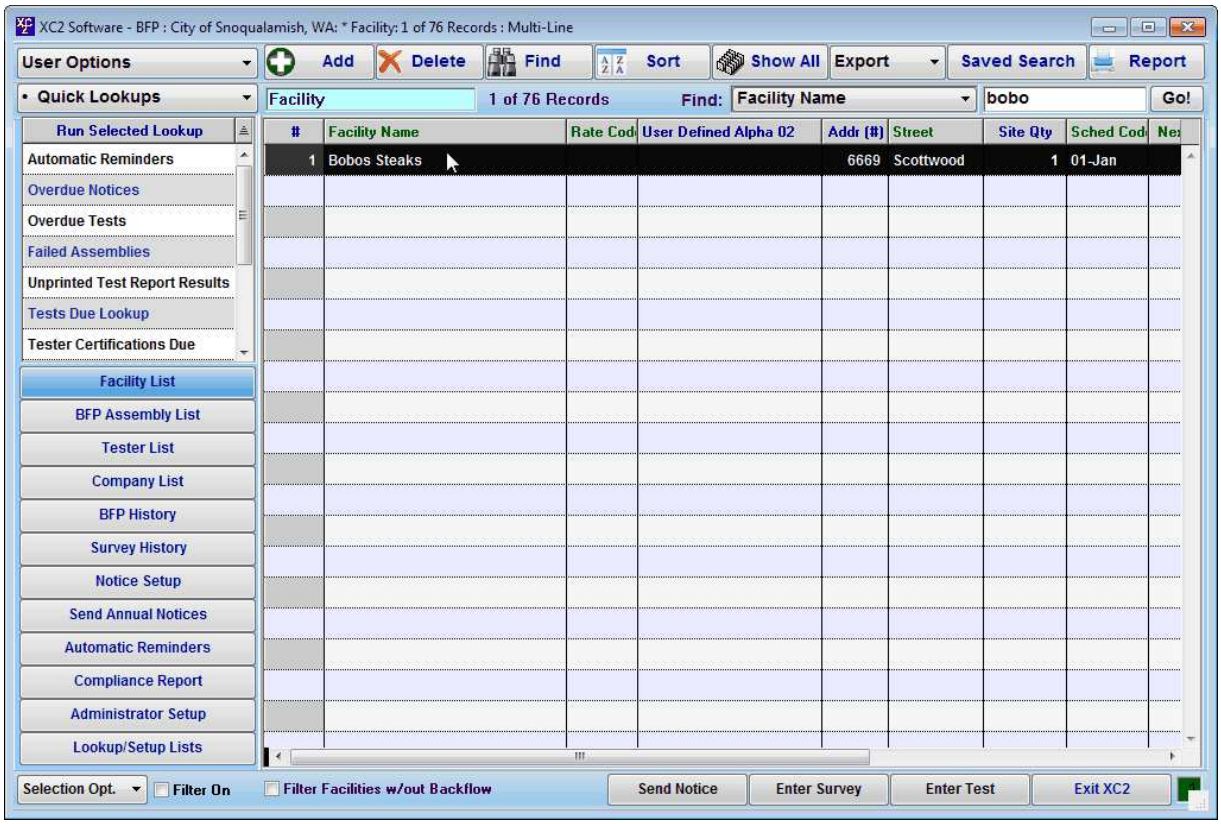
Remember, You can use the search bar on the Main Page or click Find to open the search window.



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:

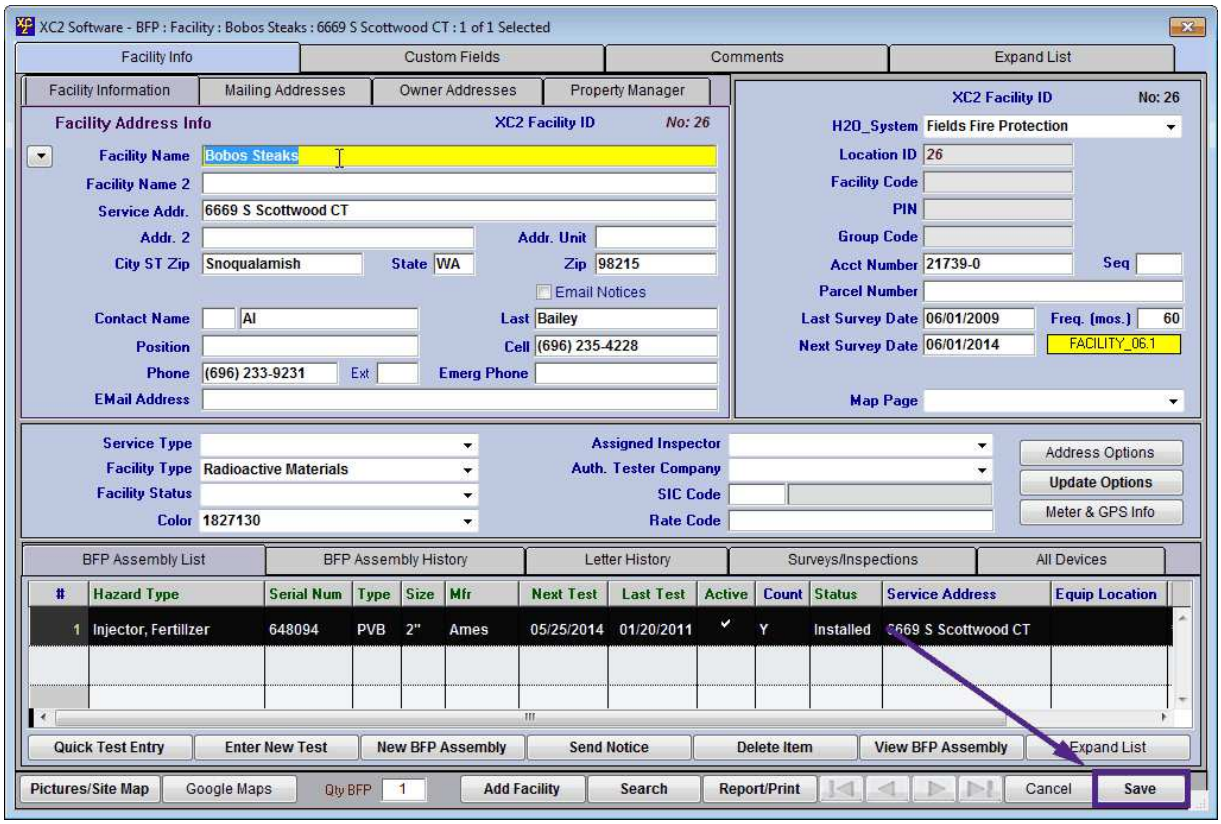
Edit Information

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.



Notes:

XC2 Software Knowledge Base

How To Change the Address Options in a Facility Record

KB Asset ID: 55

This page describes how to change the Adress 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

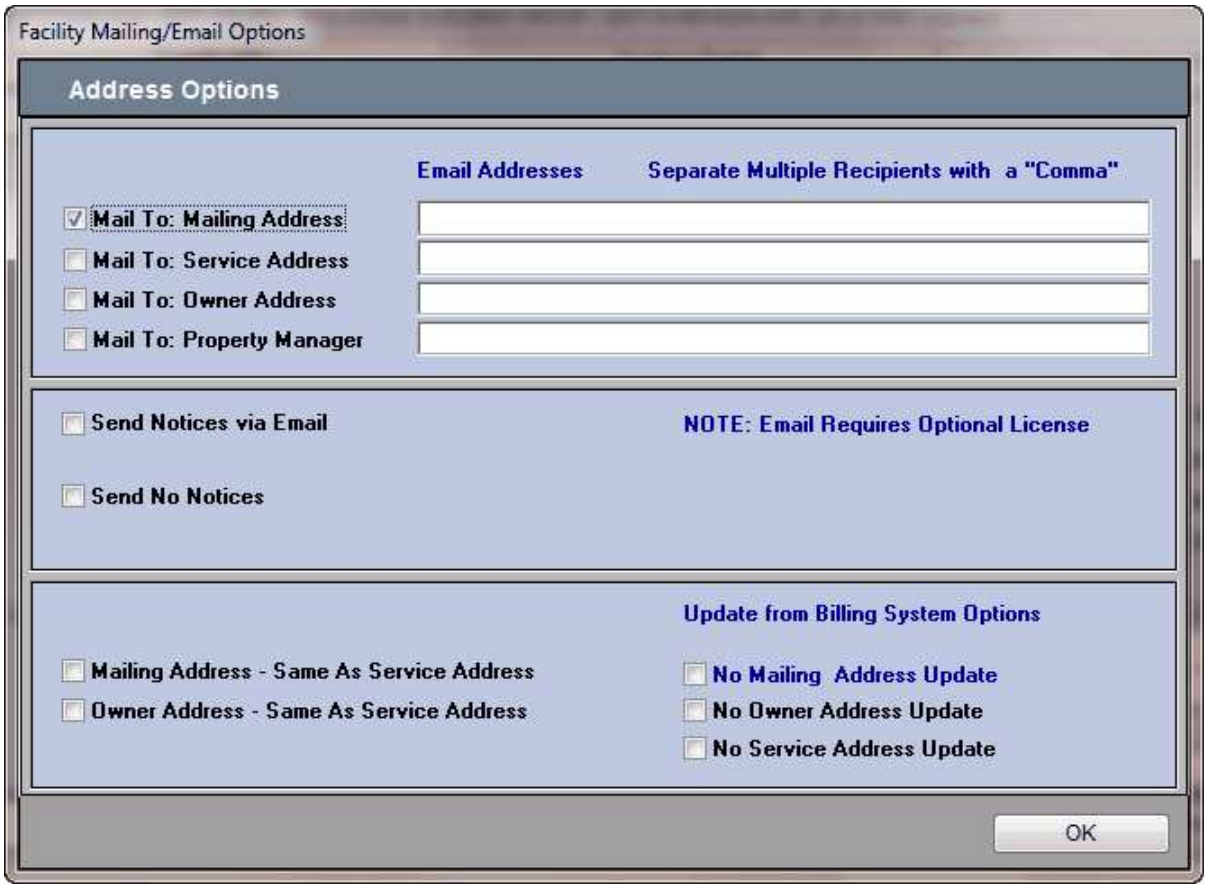
3) If a notice is sent, should it be sent by Email? (Extra license required)

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

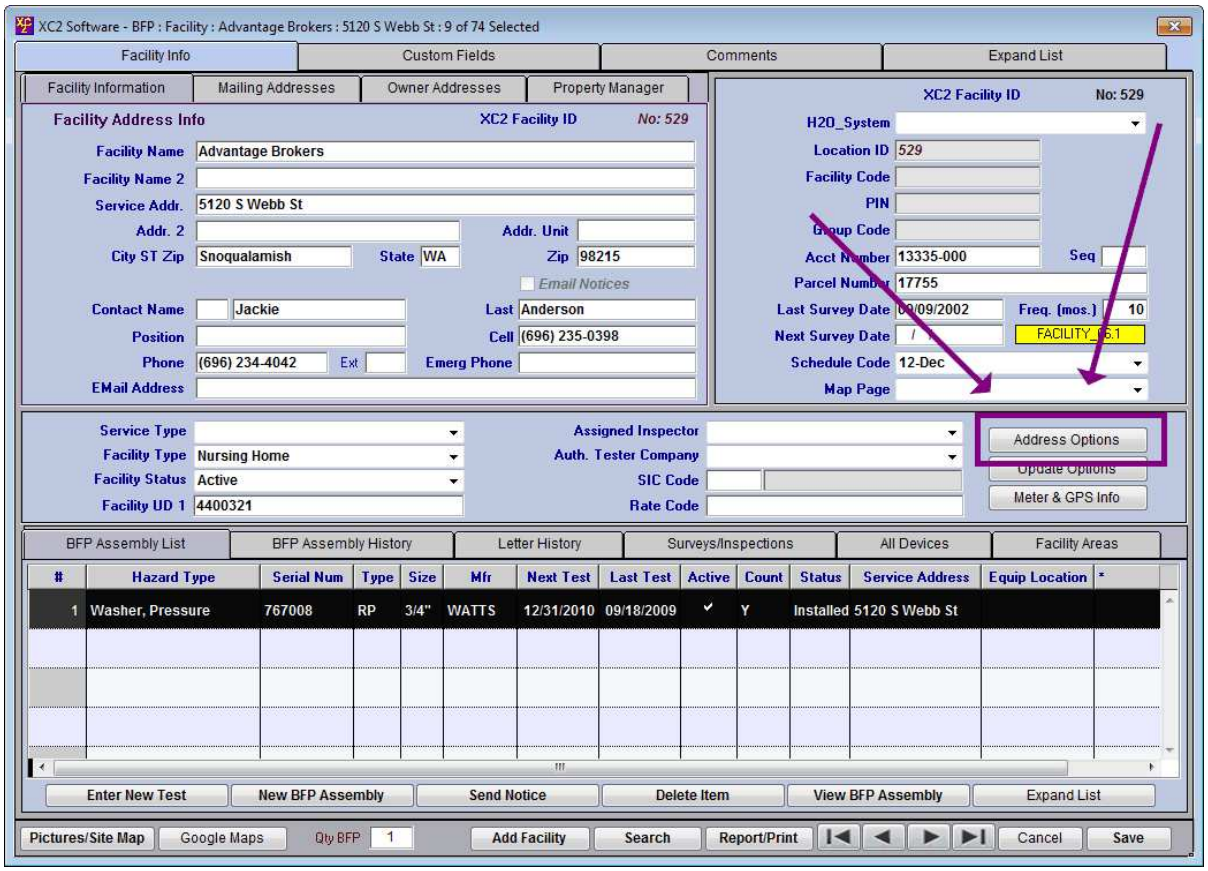


Notes:

Open a Facility Record

To access Address Options in XC2,

- Open a Facility Record
- Click Address Options



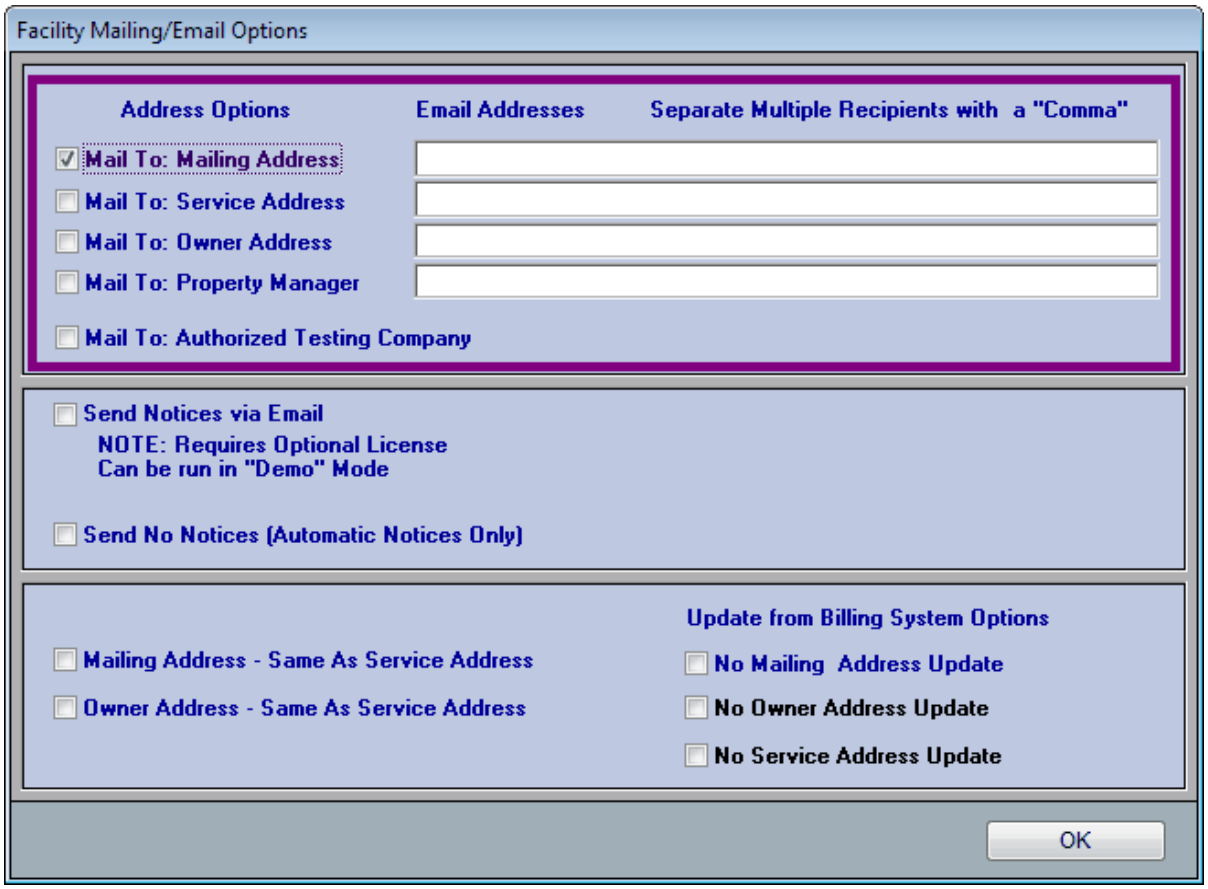
Notes:

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



Notes:

Email and Exemptions

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

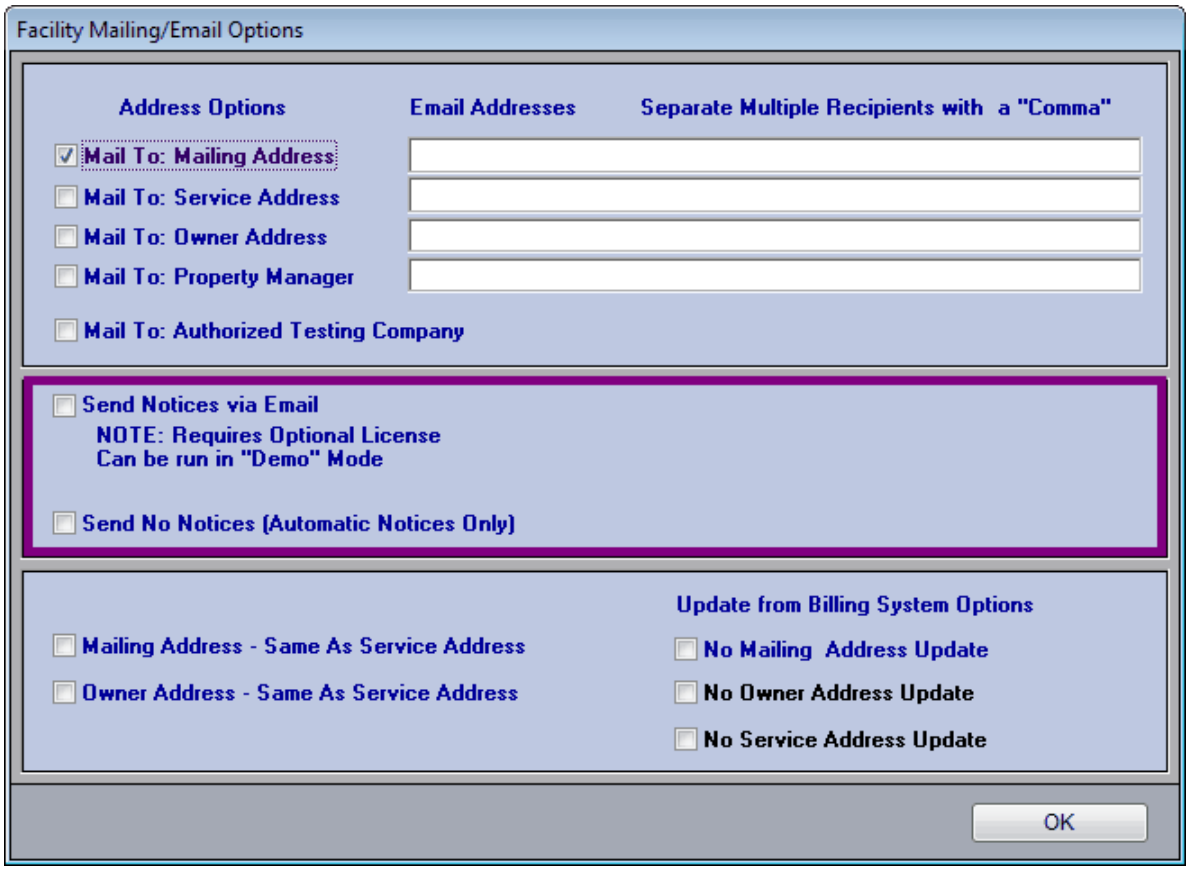
1) Send Notices via email

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 seperate license. Contact XC2 for more information

2) Send No Notices

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



Notes:

Update Options

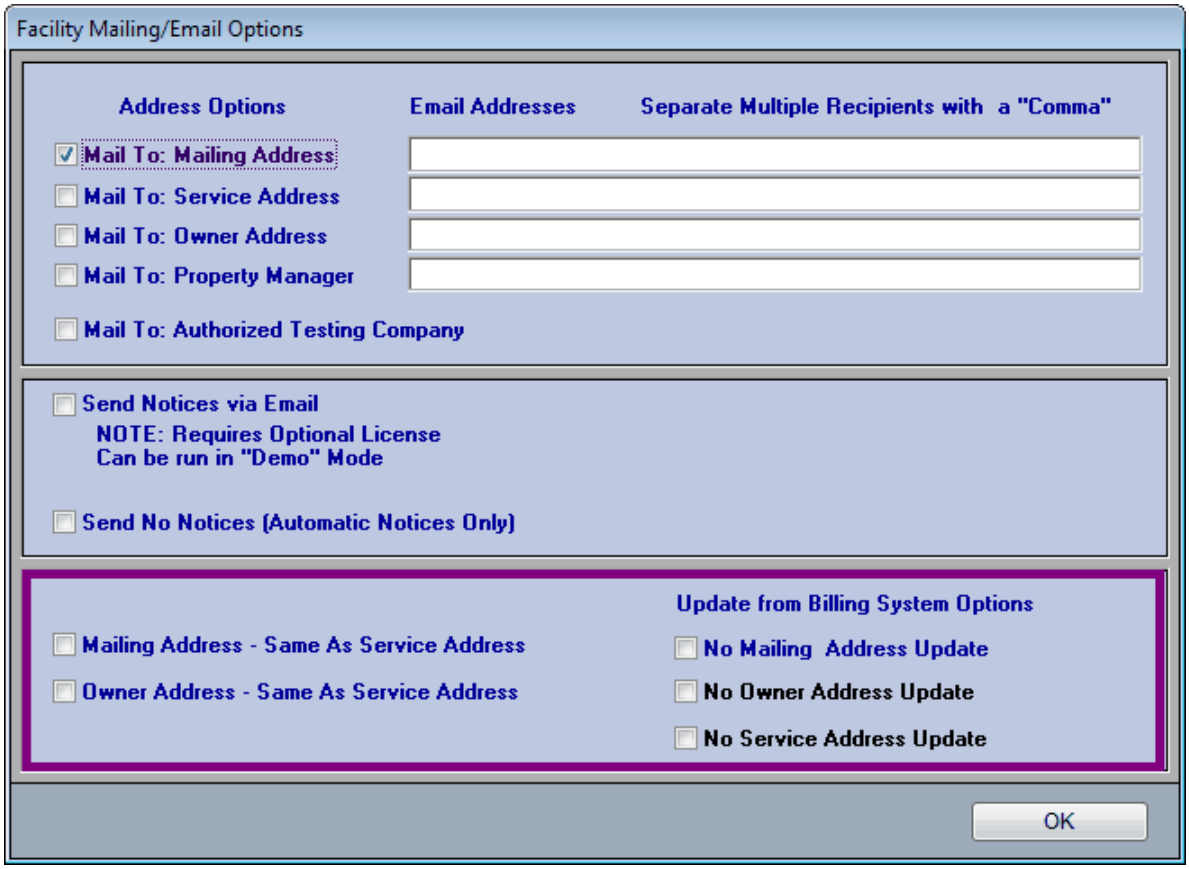
In the 3rd section of Address Options, you can

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



Notes:

XC2 Software Knowledge Base

Adding Pictures To A Facility

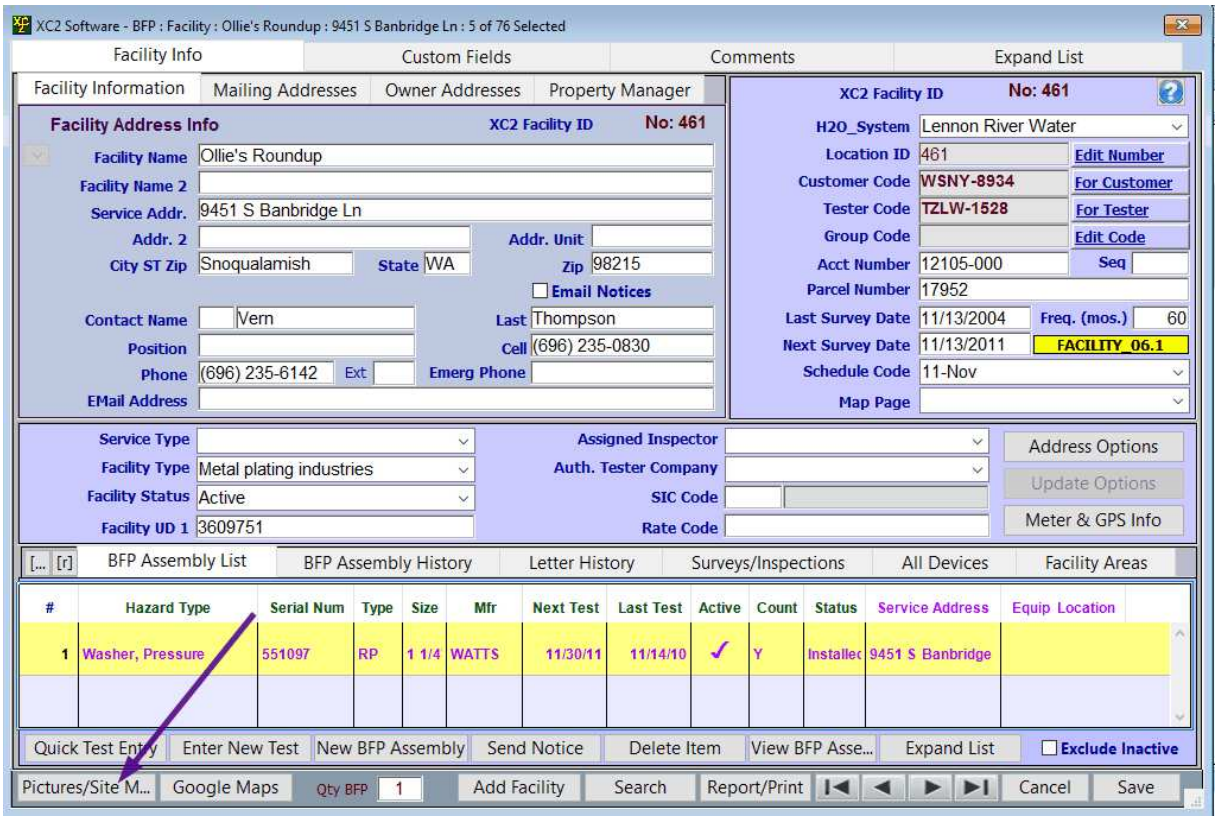
KB Asset ID: 3538

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

Open Facility Record

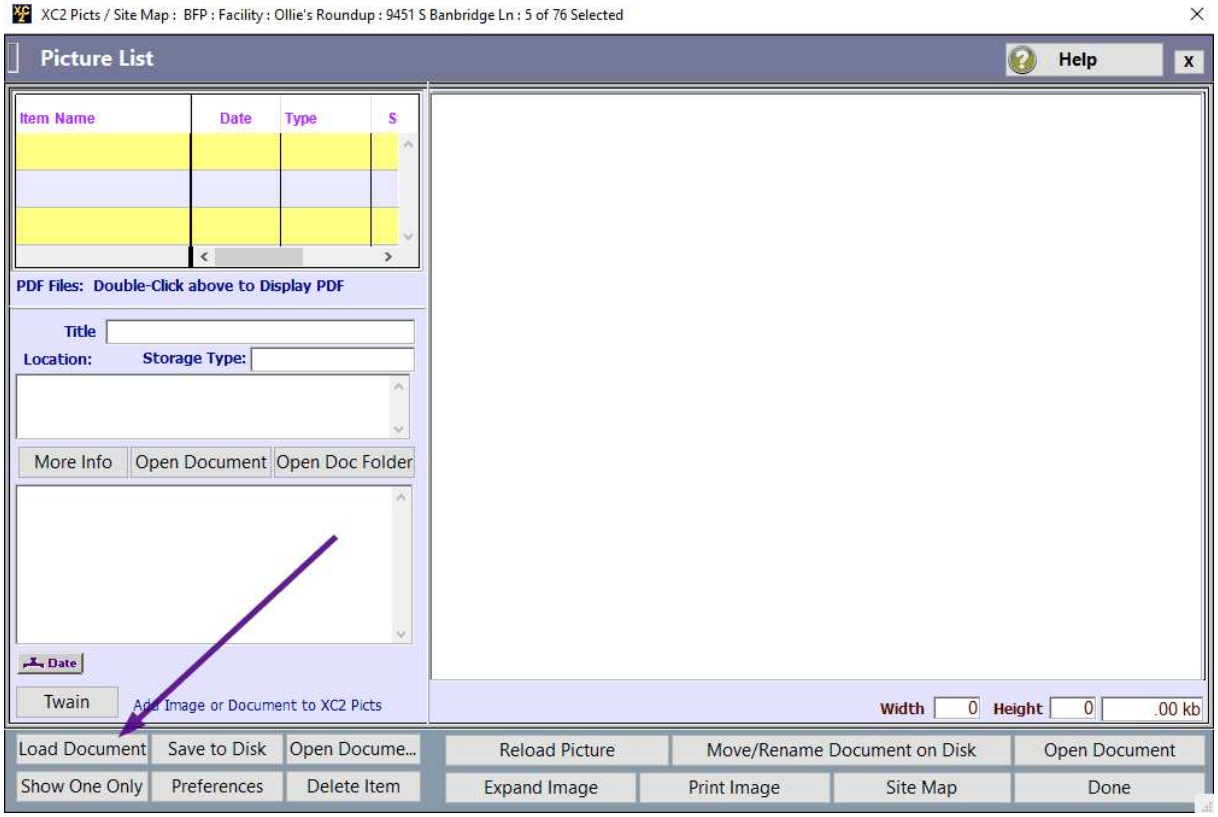
Click the button

- Pictures/Site Map



Notes:

Load Document



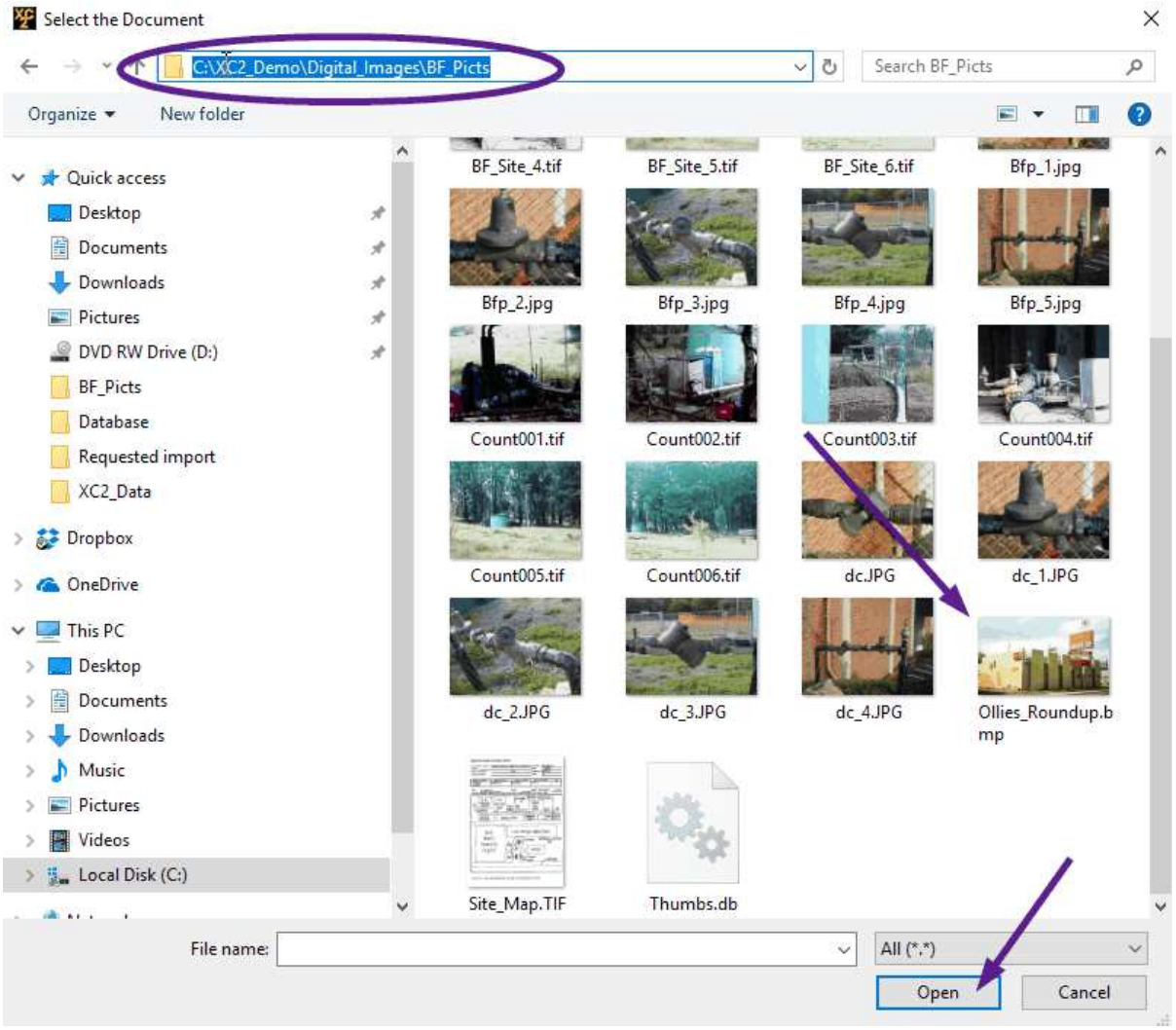
Notes:

Navigate to image location

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

Highlight the file.

Click Open

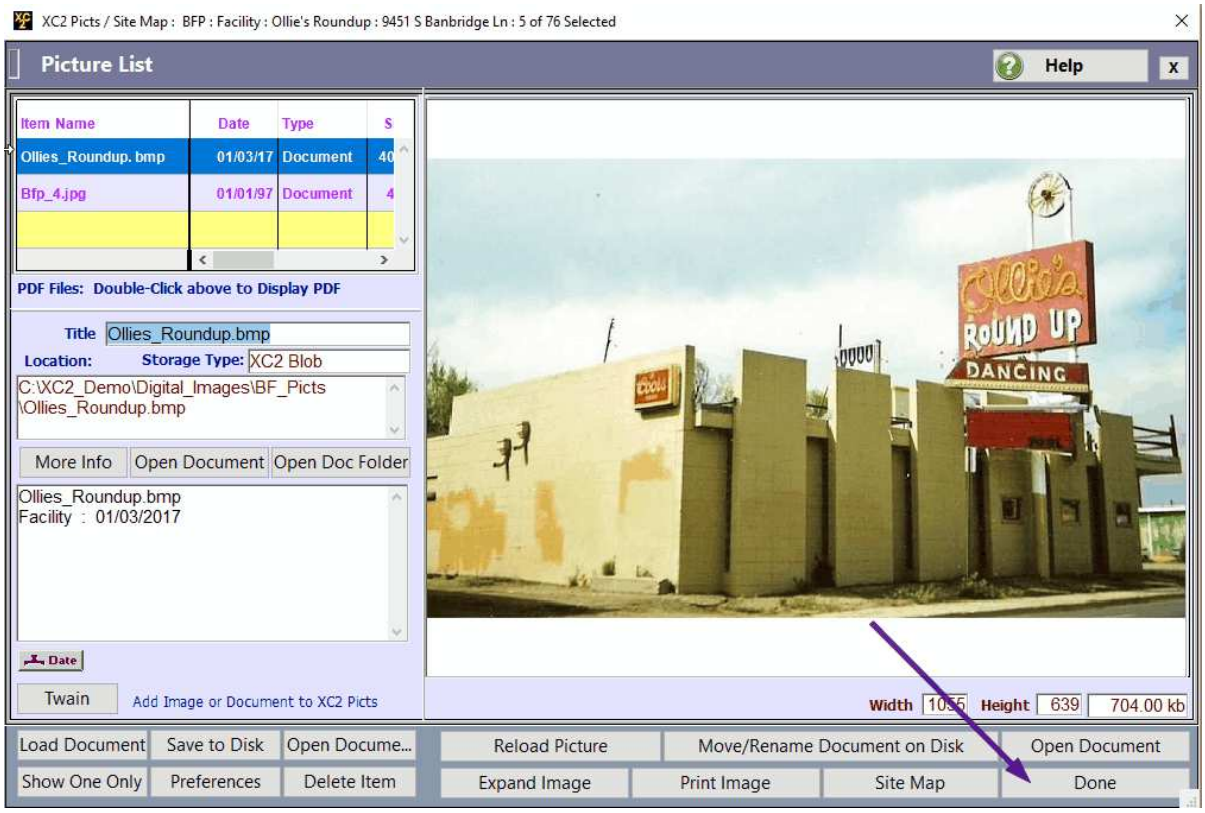


Notes:

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

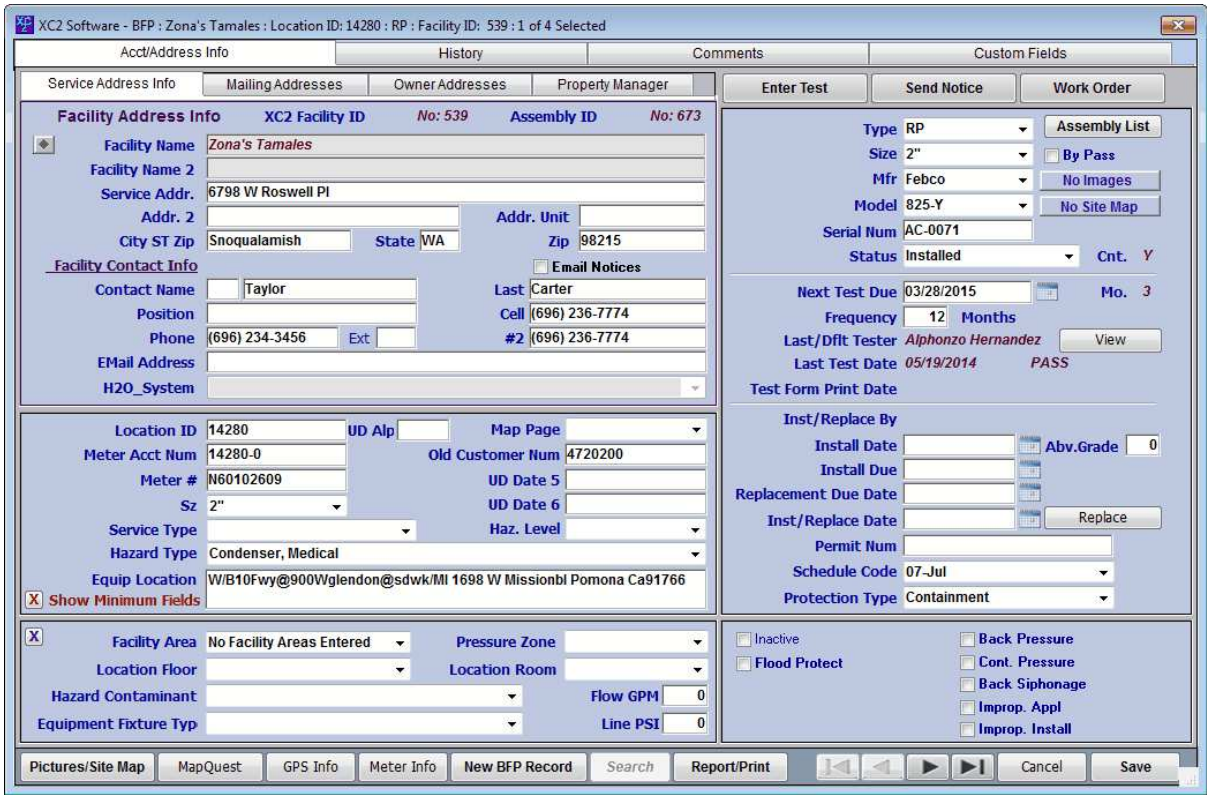
Here is an Assembly record

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



Notes:

XC2 Software Knowledge Base

Assembly Screen Overview

KB Asset ID: 3522

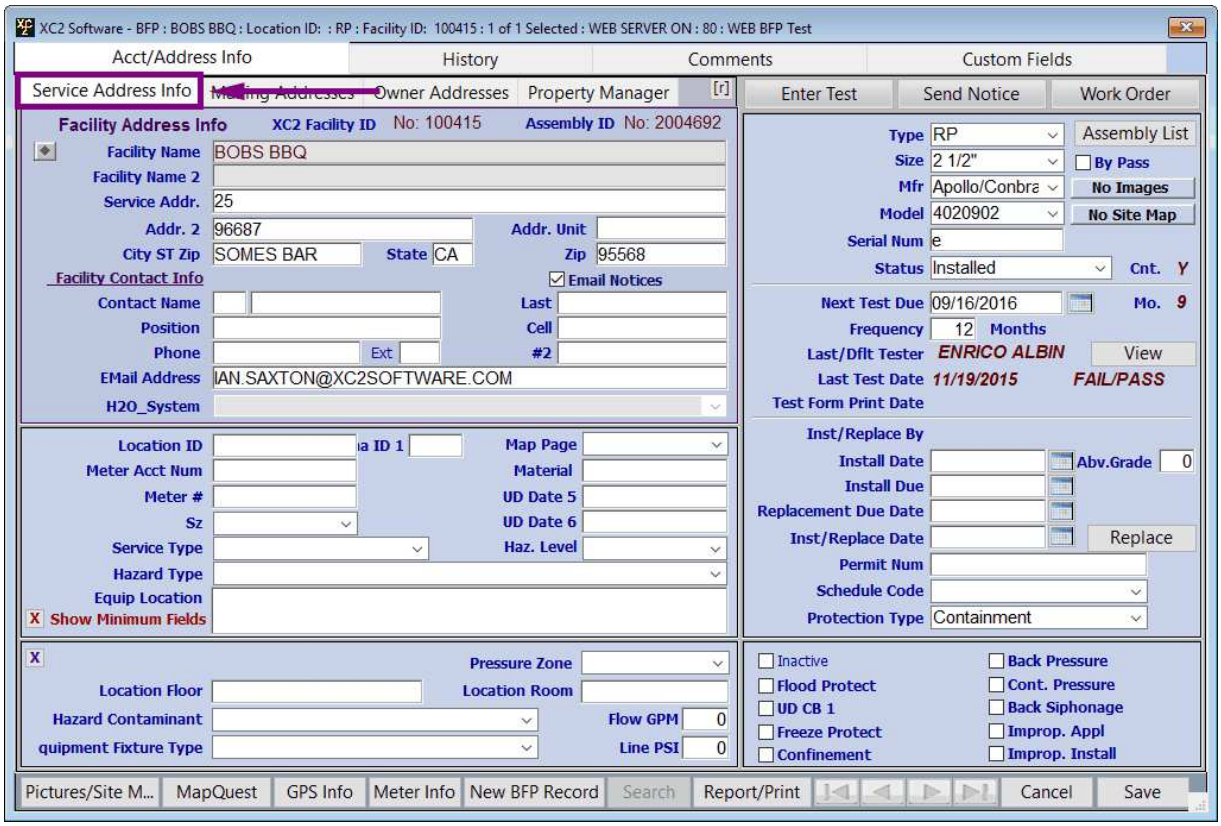
This page describes the different parts of XC2 's Assembly Screen

Service Address Information

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

By defualt, 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.

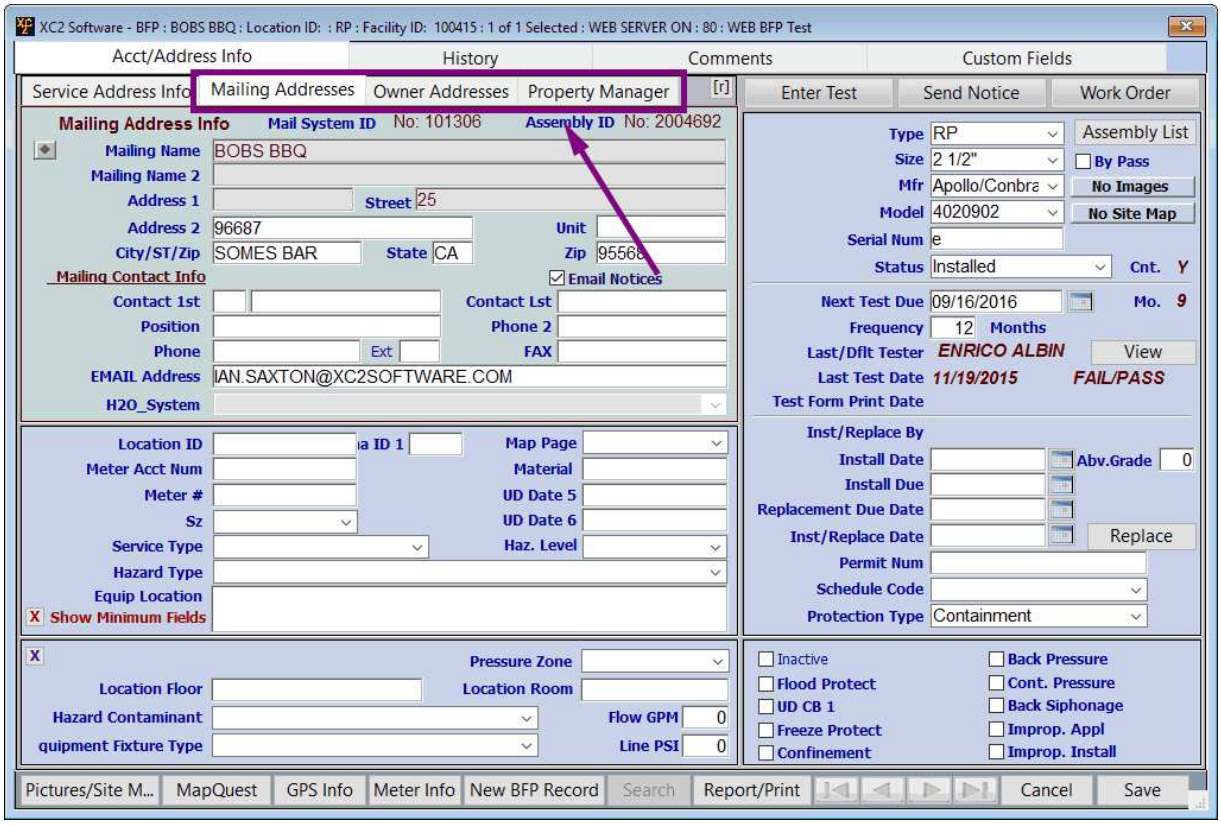


Notes:

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.

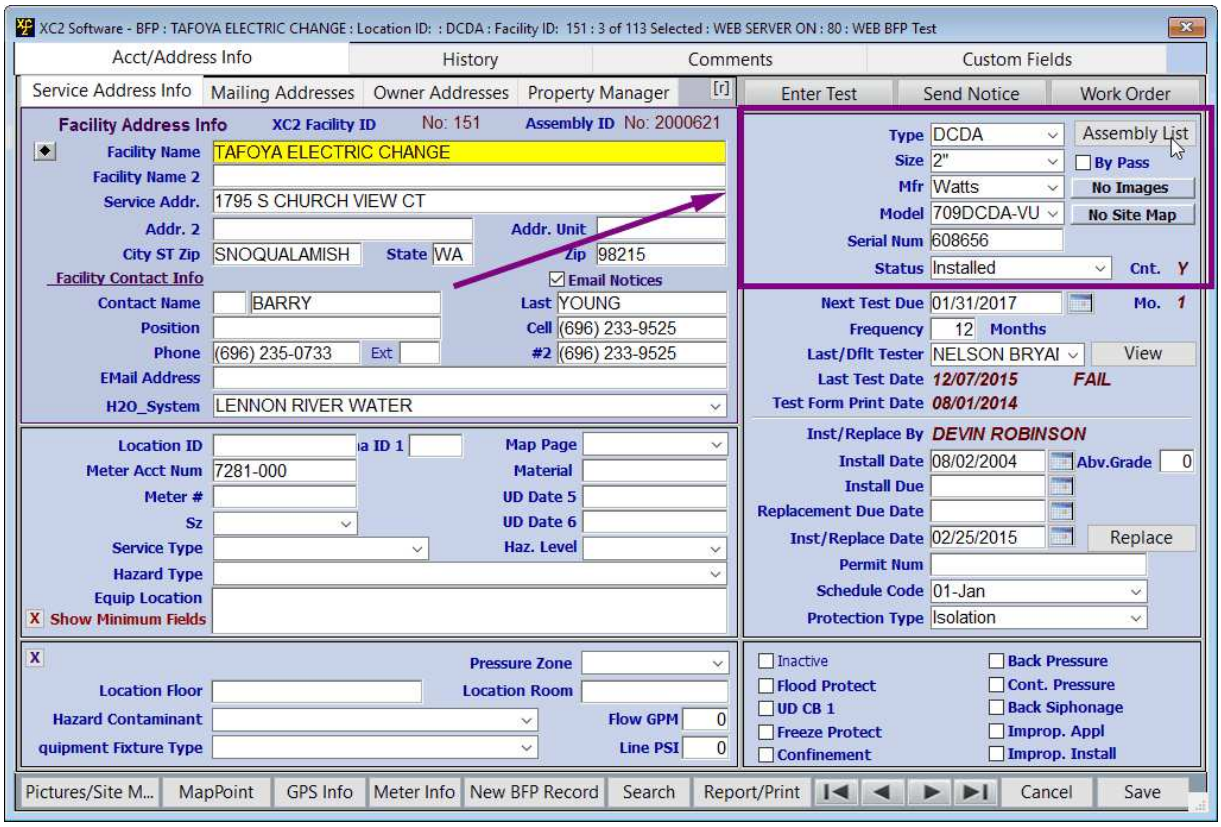


Notes:

Physical Assembly Information

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

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

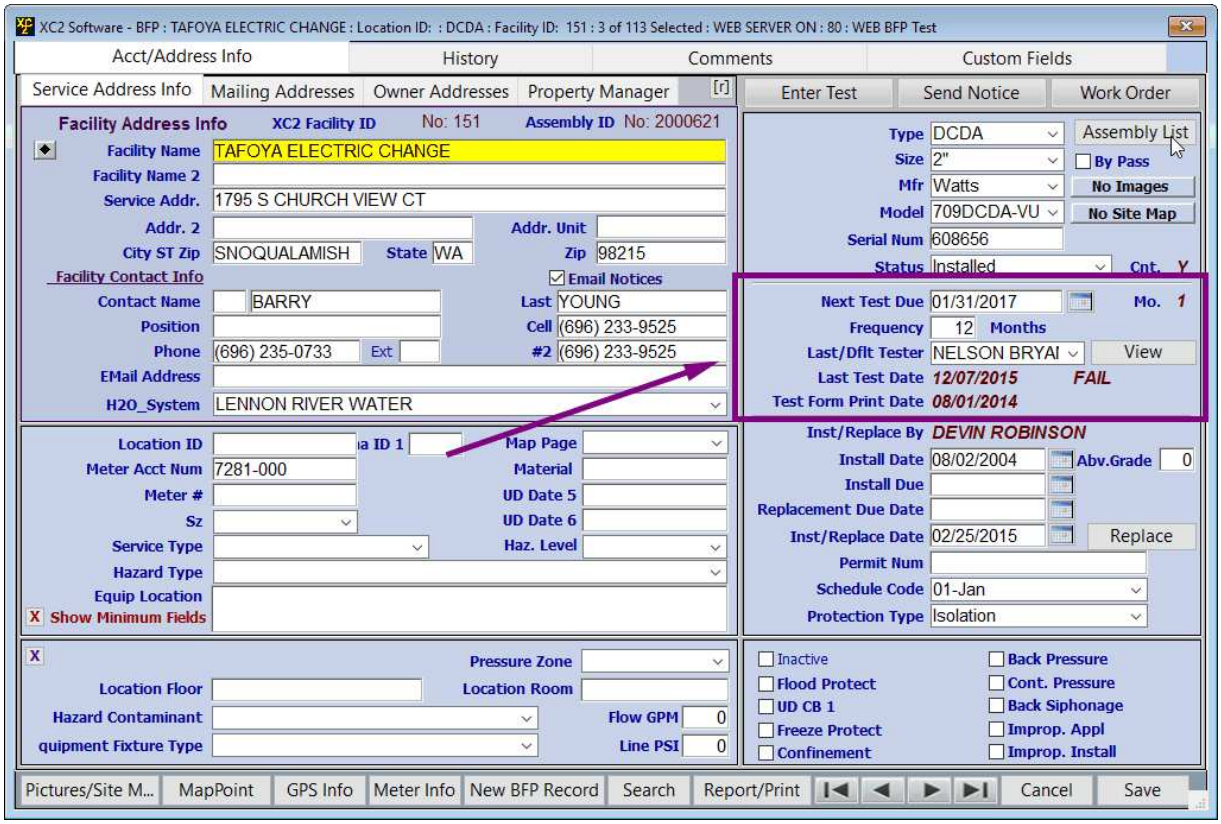


Notes:

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

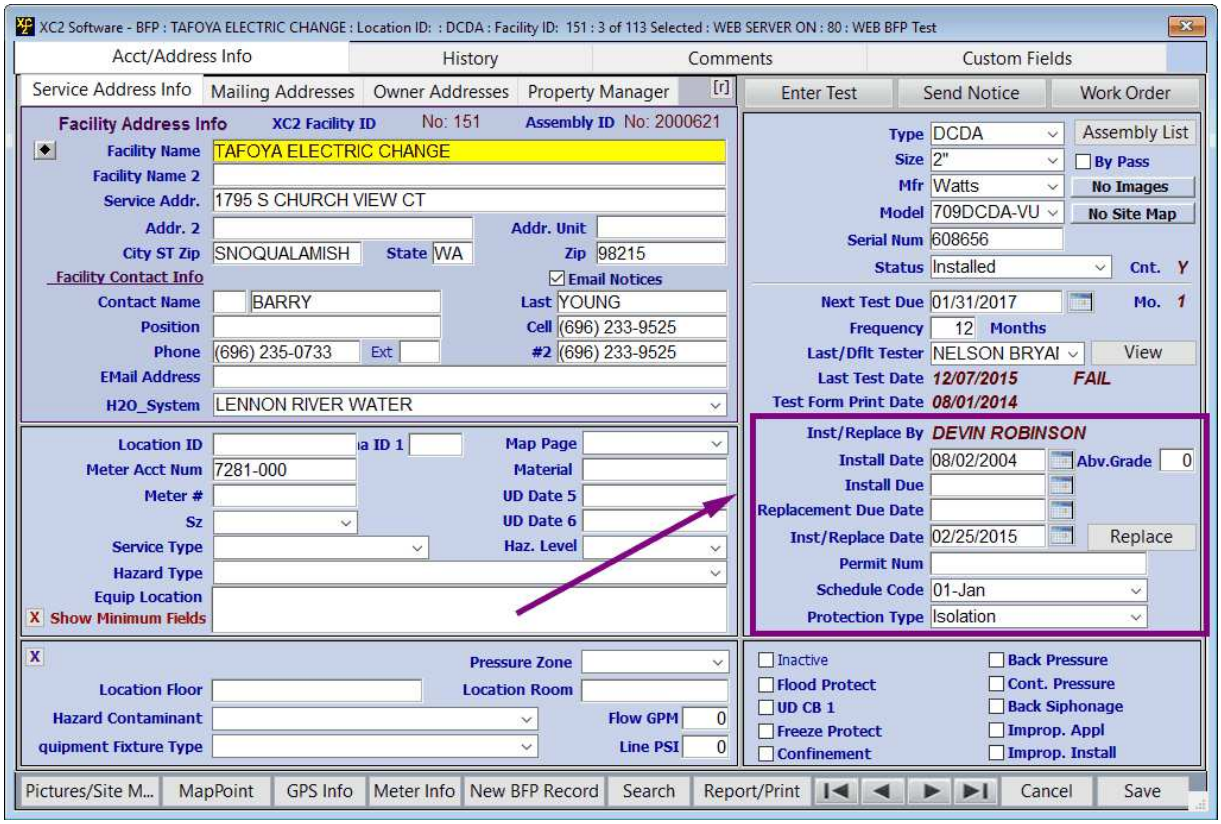


Notes:

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



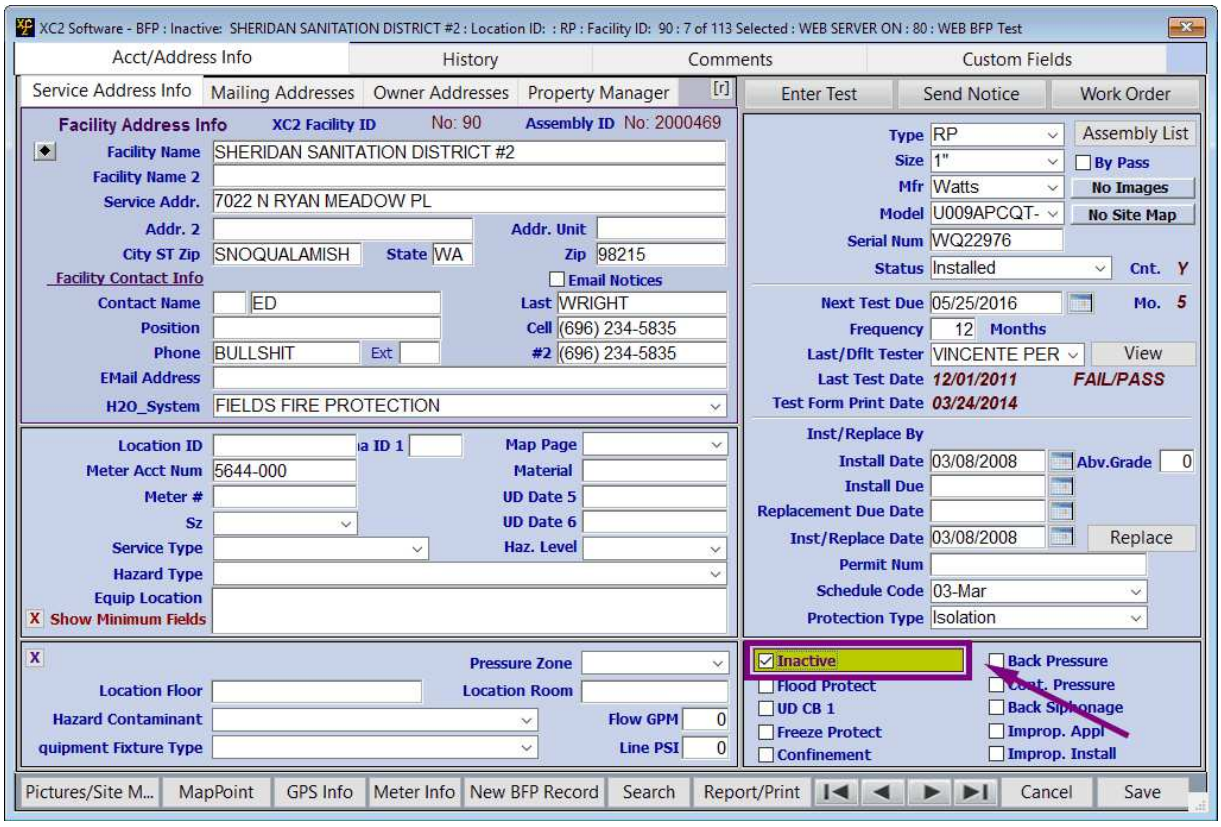
Notes:

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:

XC2 Software Knowledge Base

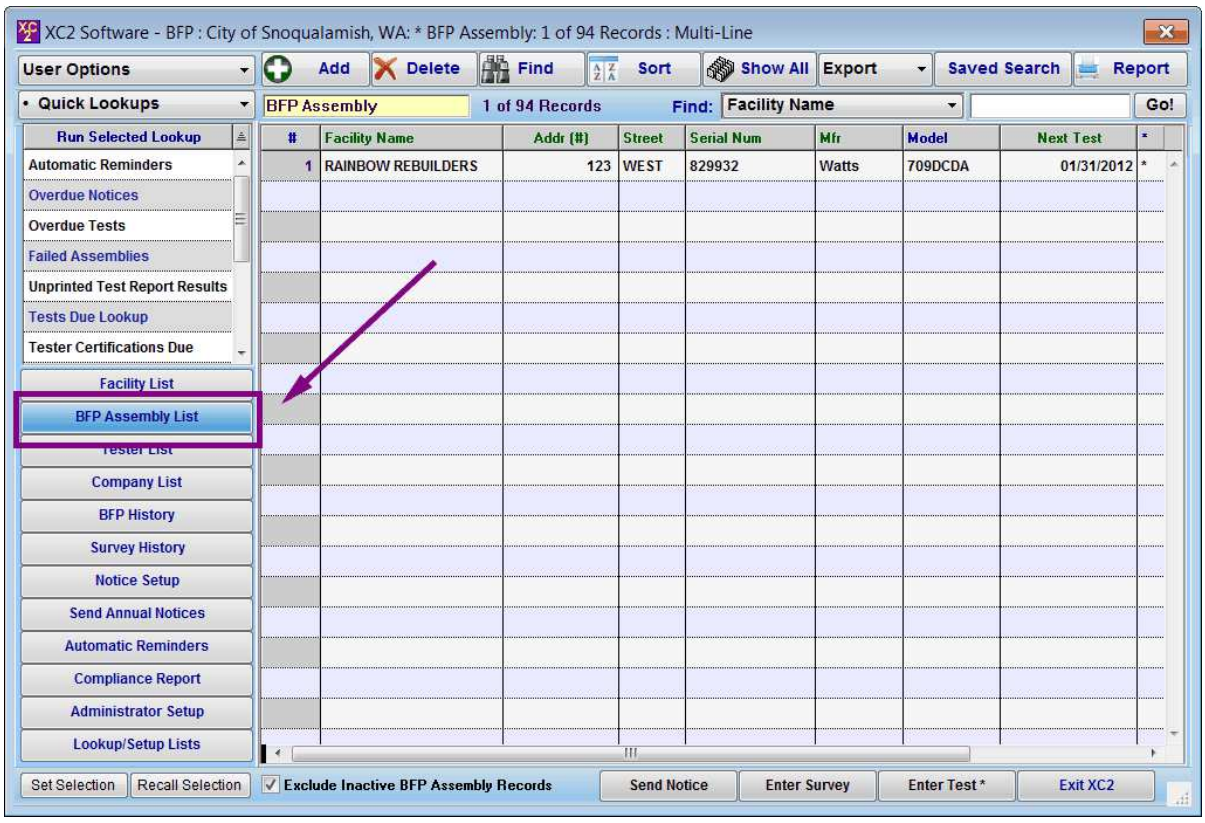
How to Create a New Assembly Record

KB Asset ID: 2429

Describes how to Create a new Backflow Assembly Record

Select Assembly List

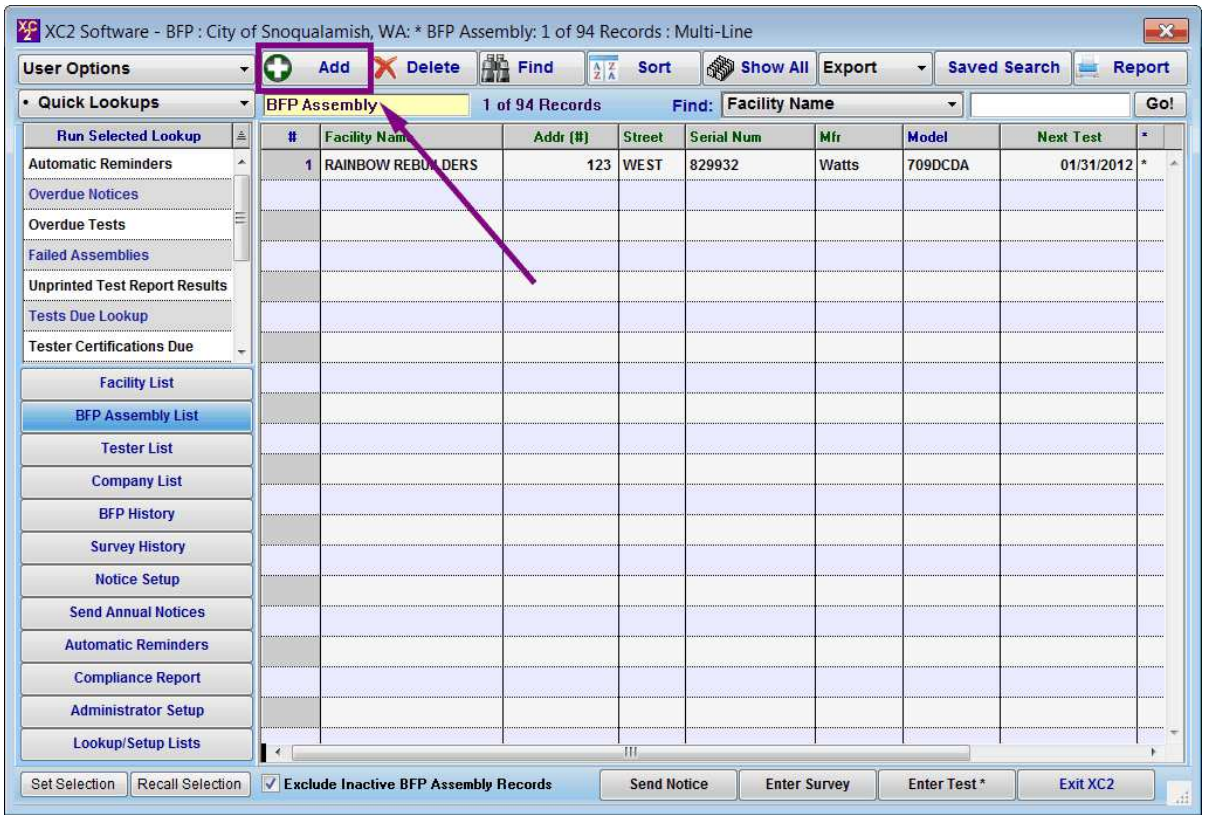
Select the Assembly List



Notes:

Click Add

Click the Add Button

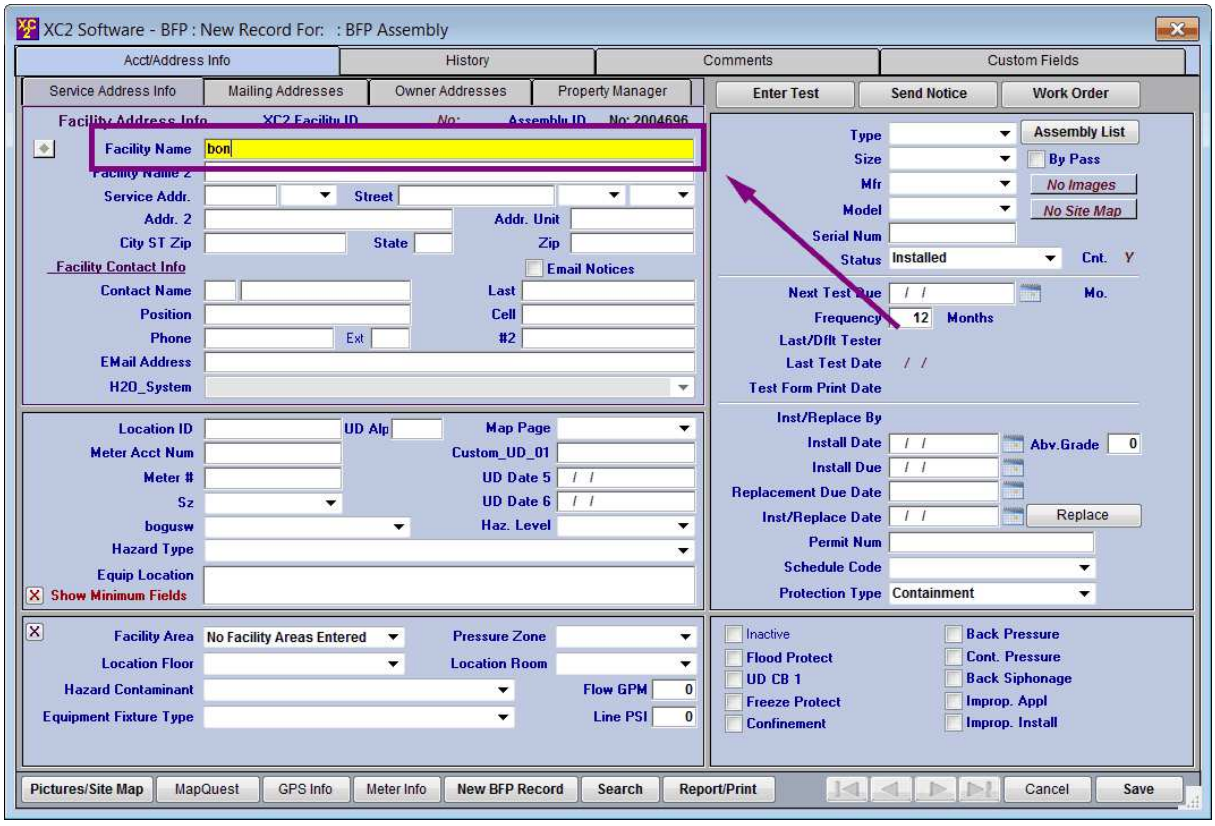


Notes:

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.

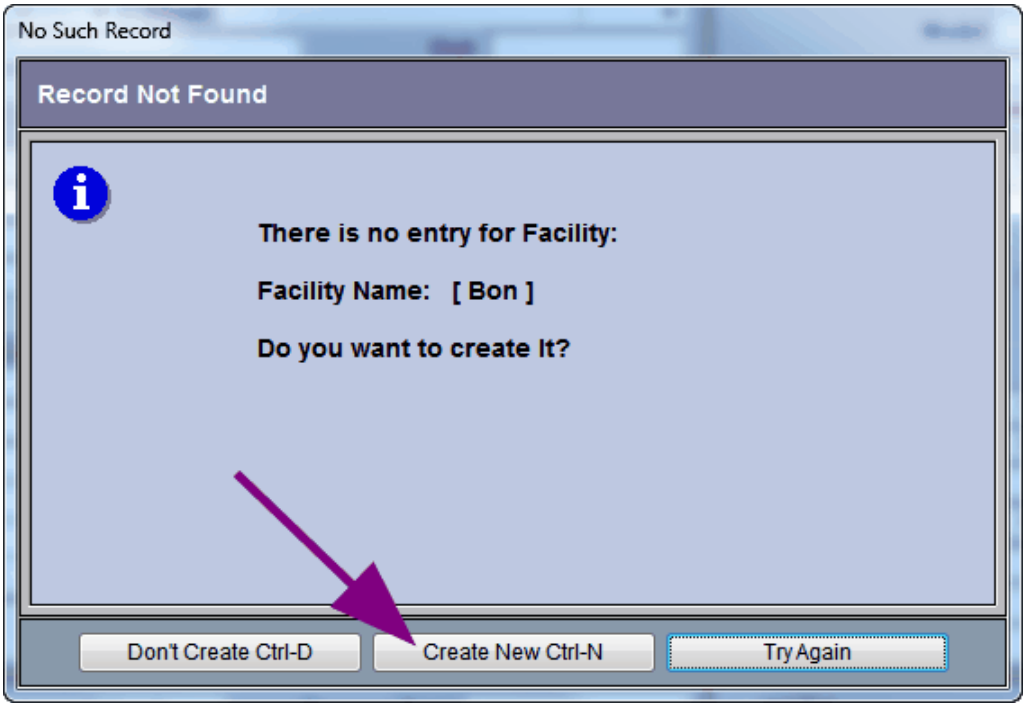


Notes:

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



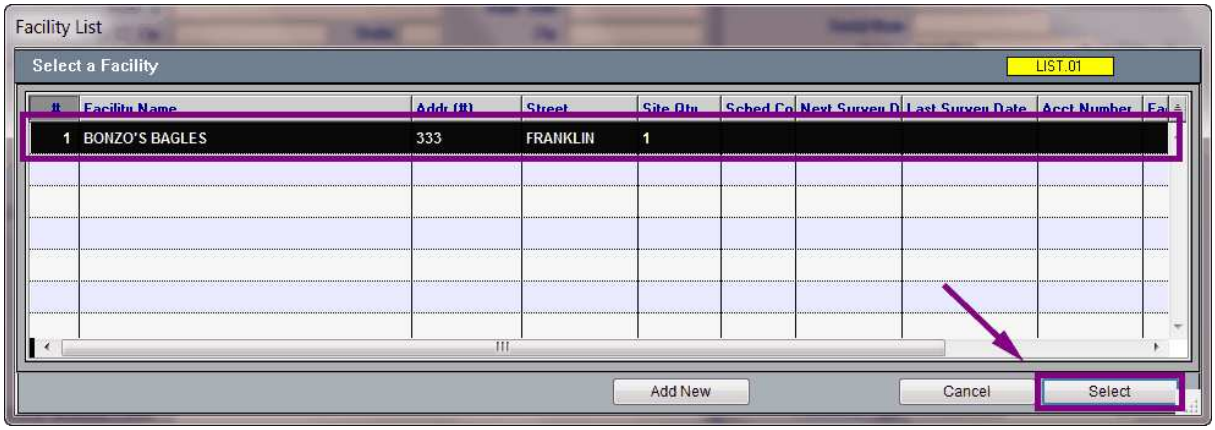
Notes:

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



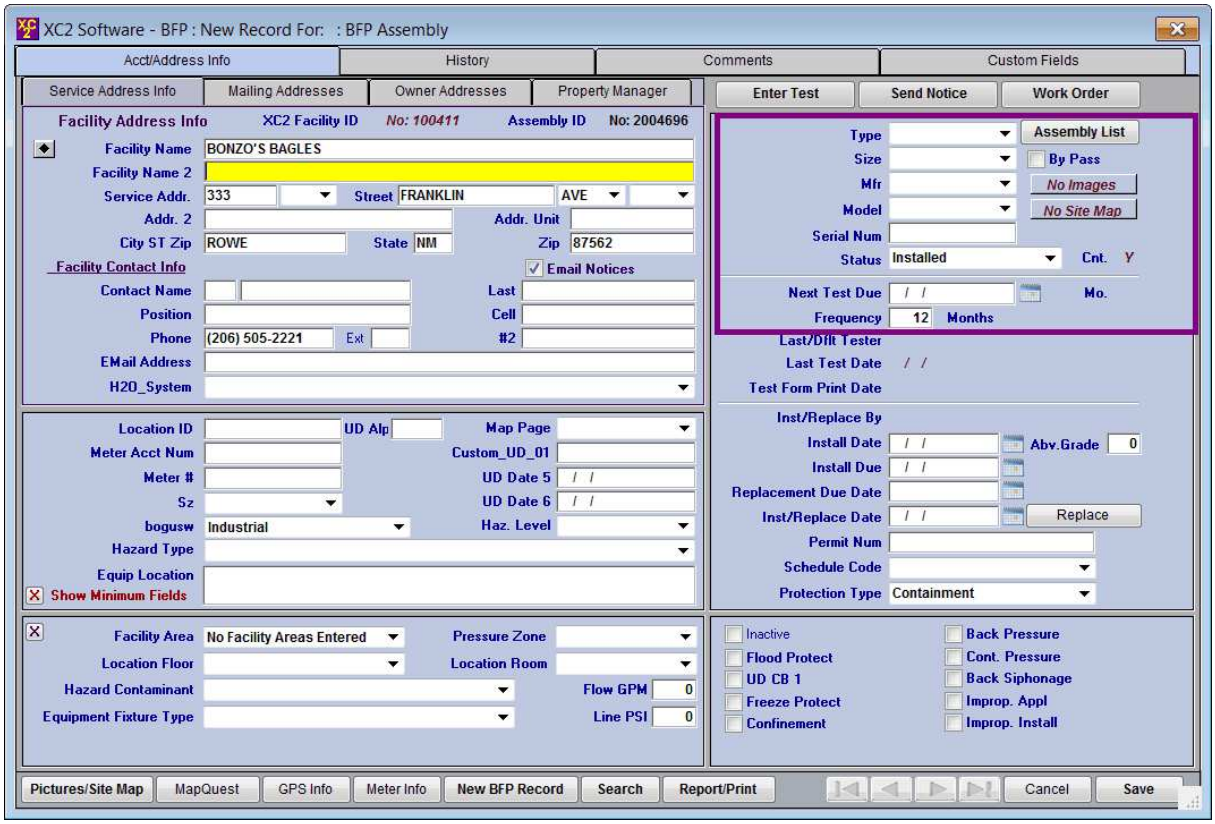
Notes:

Enter Assembly Information

Enter all information into their Proper fields

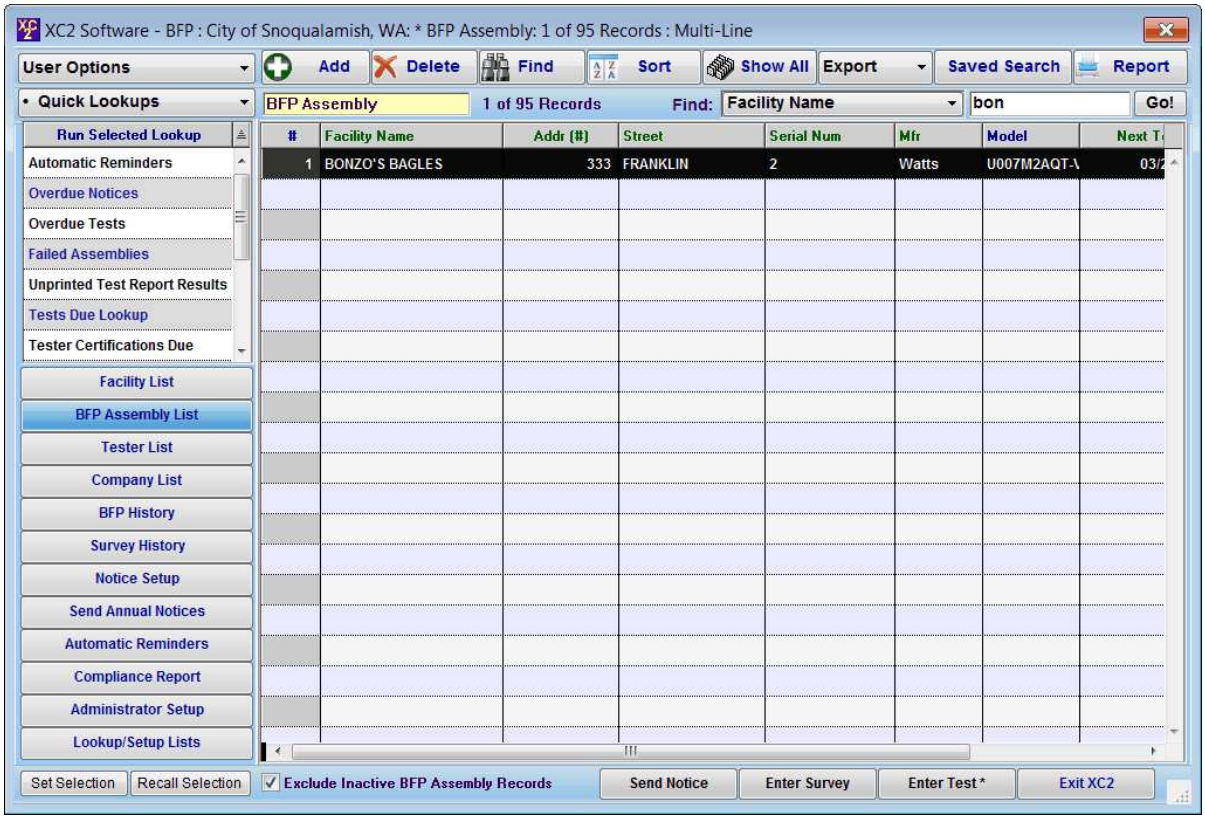
1. Assembly Type
2. Size
3. Manufacture
4. Model
5. Serial Number
6. Status
7. Next Test Due Date
8. Fequency Tested (In Months)

Click Save when Finished



Notes:

You have Now Created a New Assembly Record



Notes:

XC2 Software Knowledge Base

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

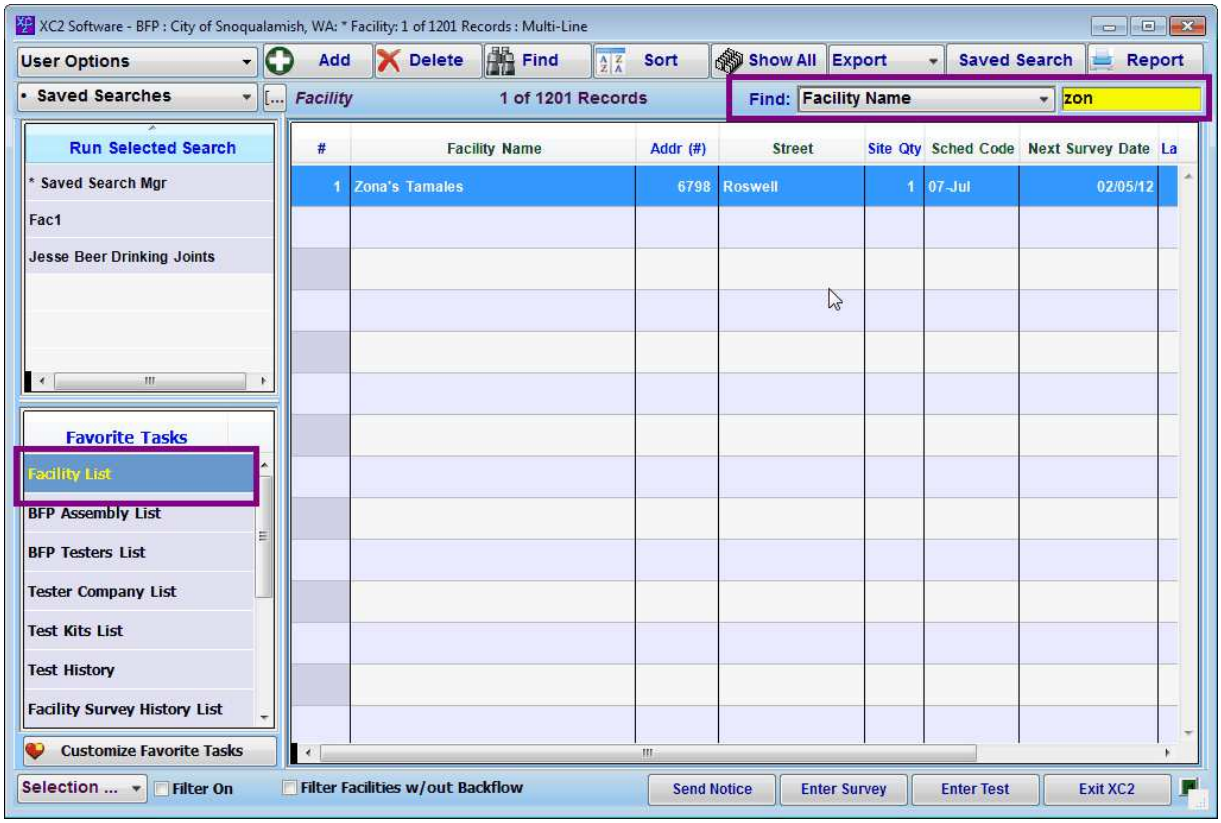
KB Asset ID: 19

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

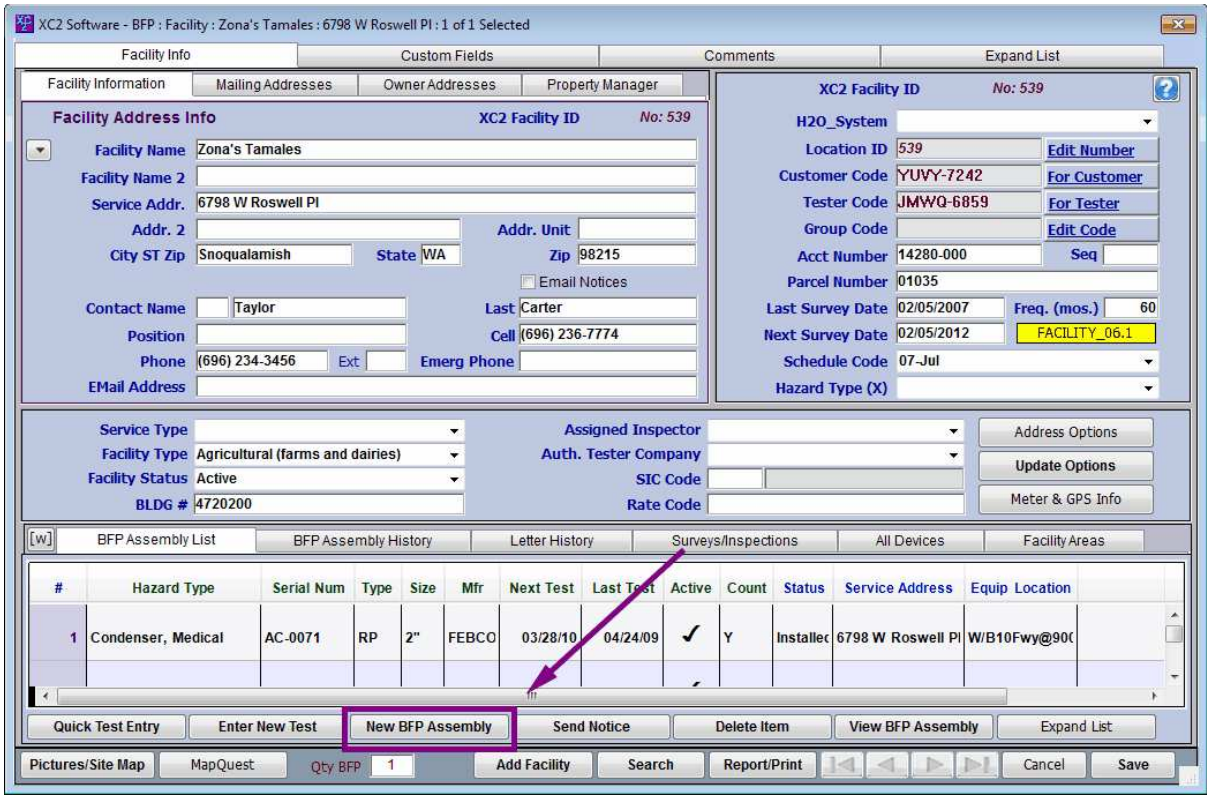


Notes:

Facility Record

Once inside the record

Click on New BFP Record



Notes:

XC2 Software Knowledge Base

How to Edit Backflow Assembly Information

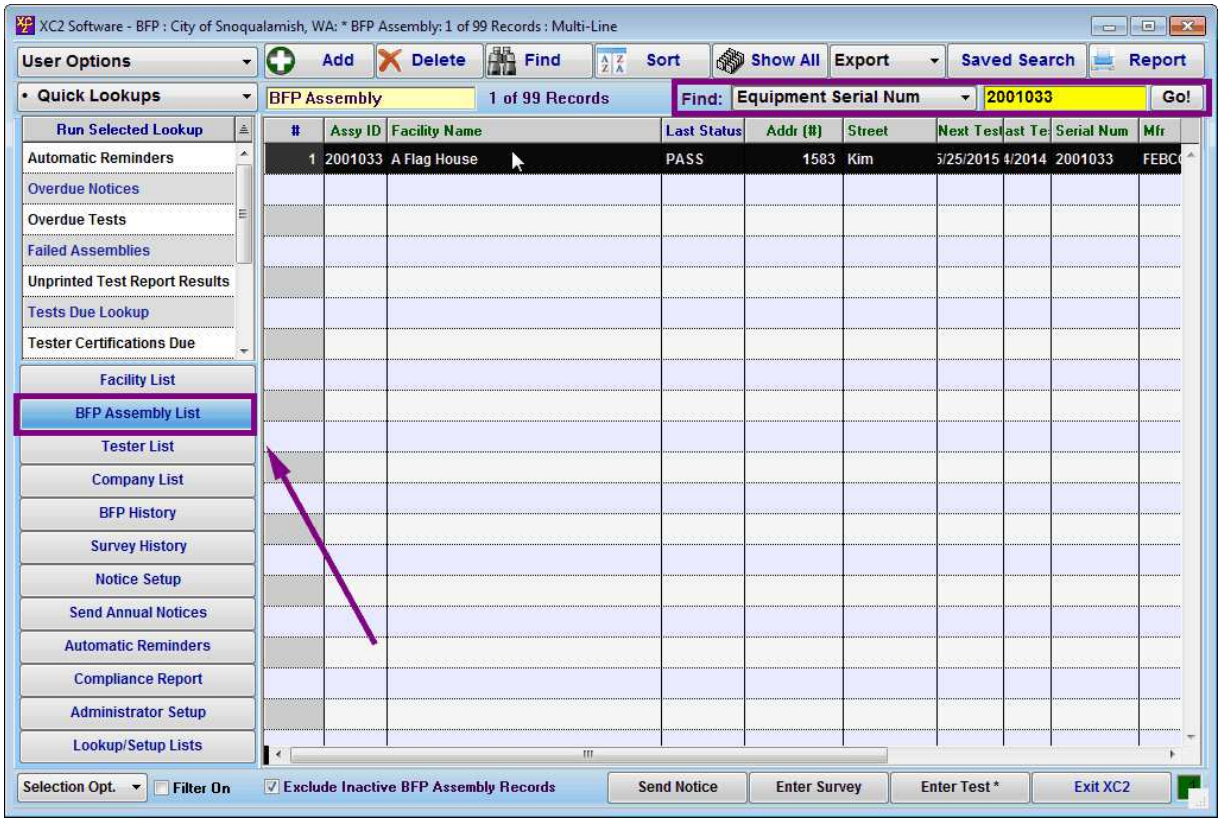
KB Asset ID: 2616

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.



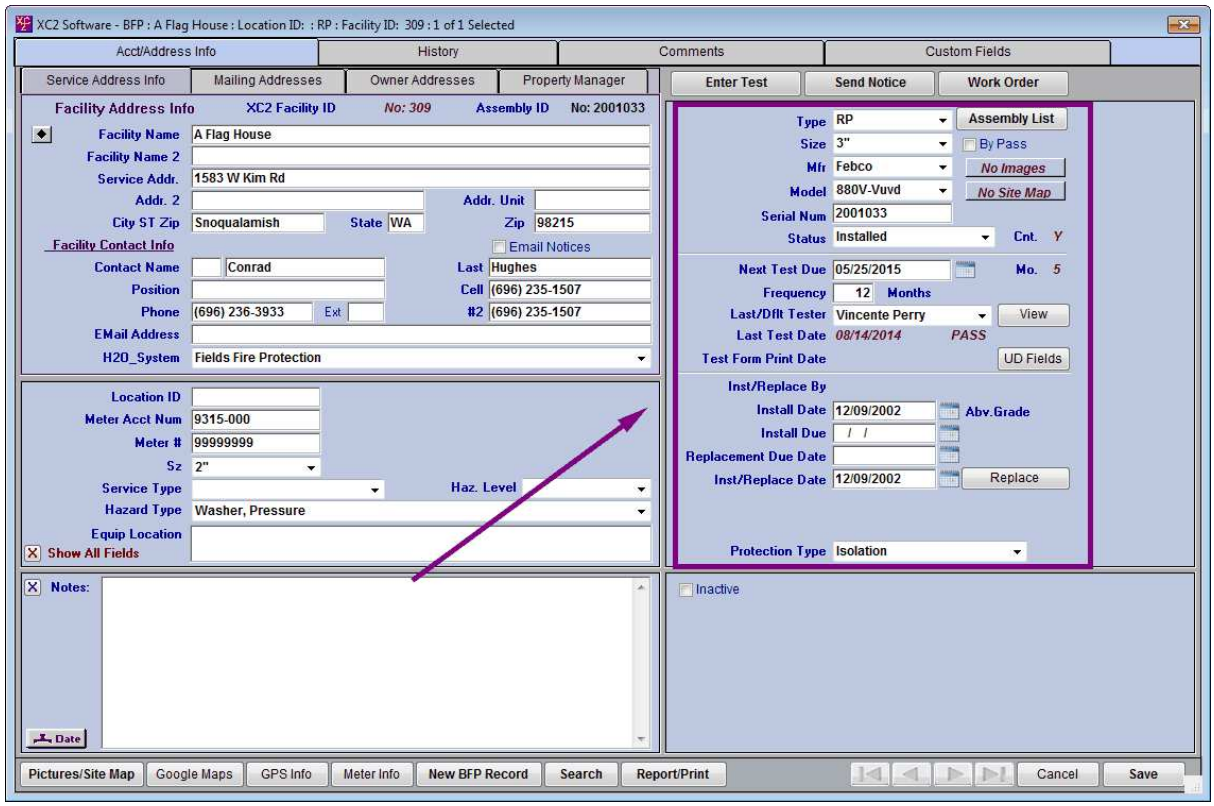
Notes:

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



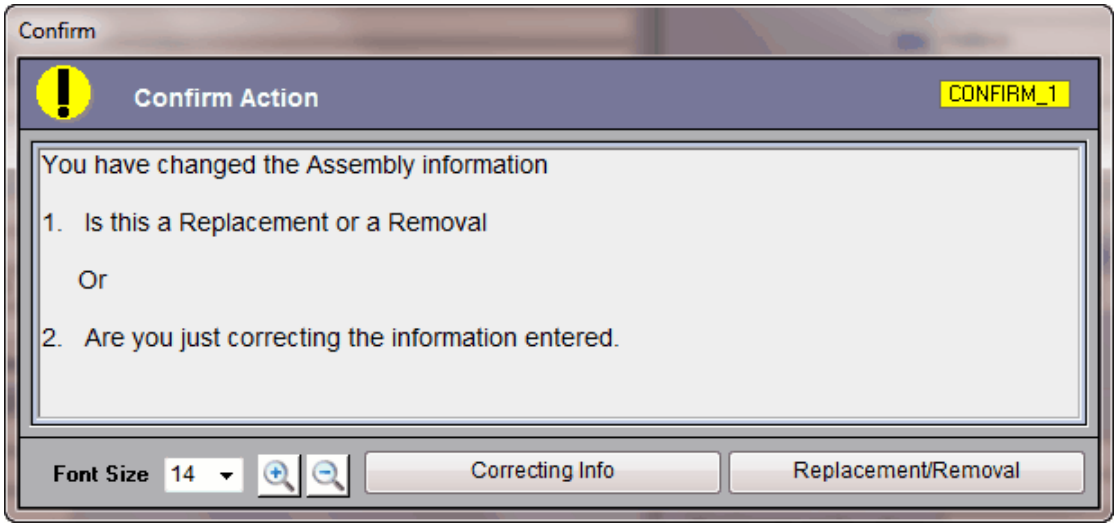
Notes:

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

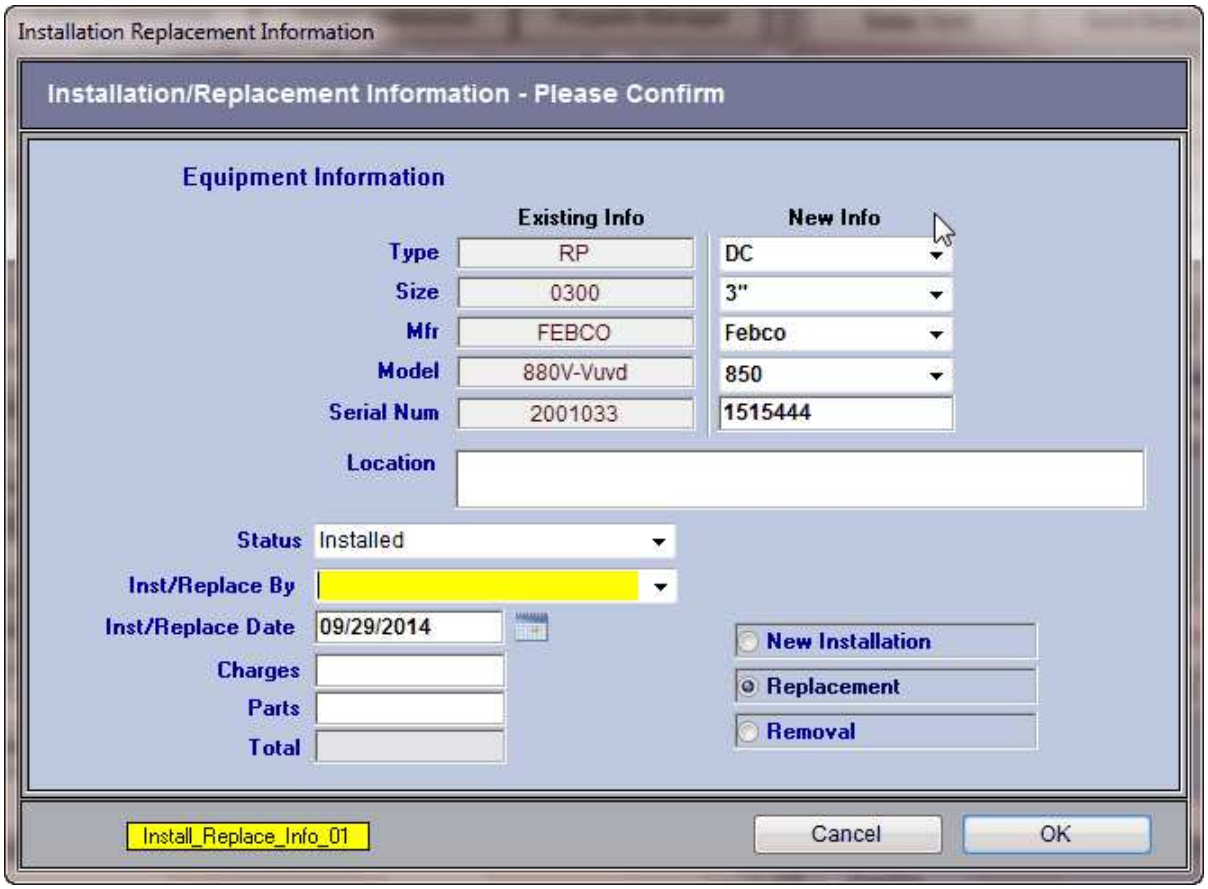


Notes:

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 endited your assembly information



Notes:

XC2 Software Knowledge Base

Adding Pictures To Backflow Records

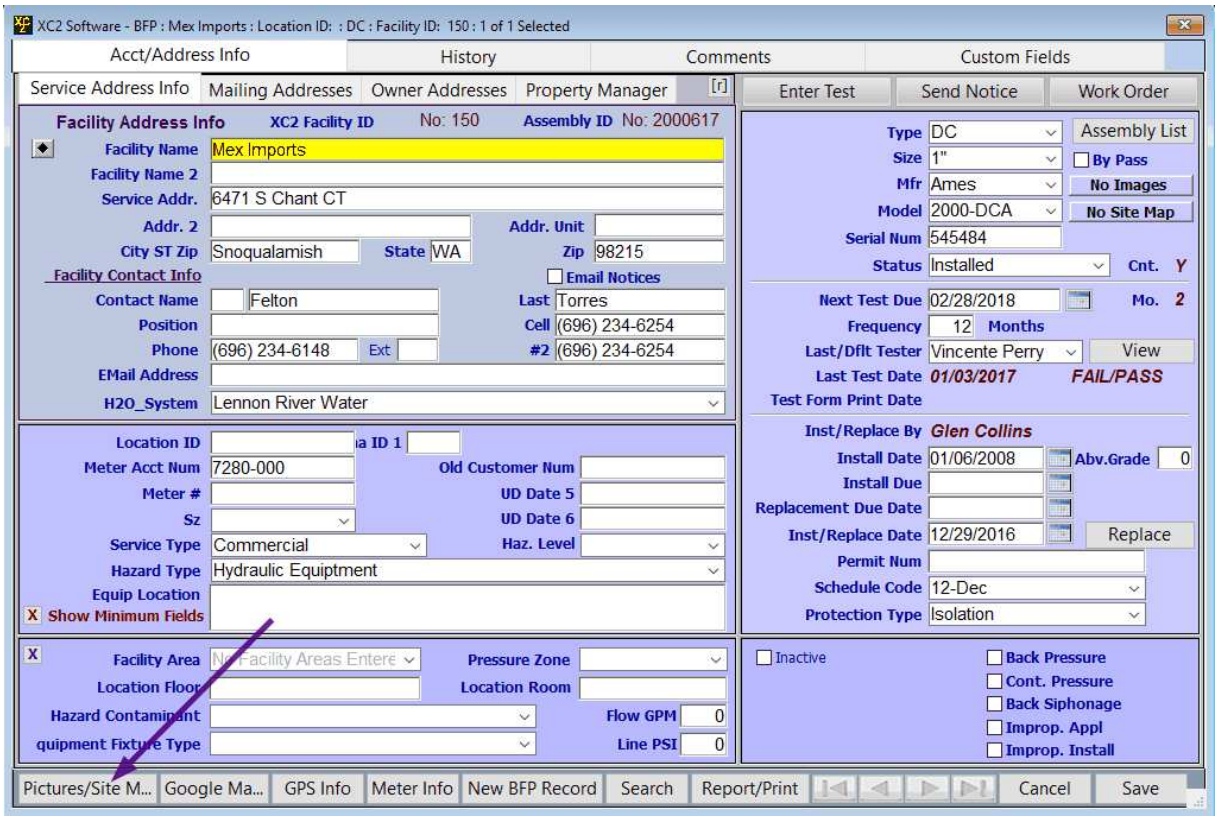
KB Asset ID: 3539

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

Open an Assembly Record

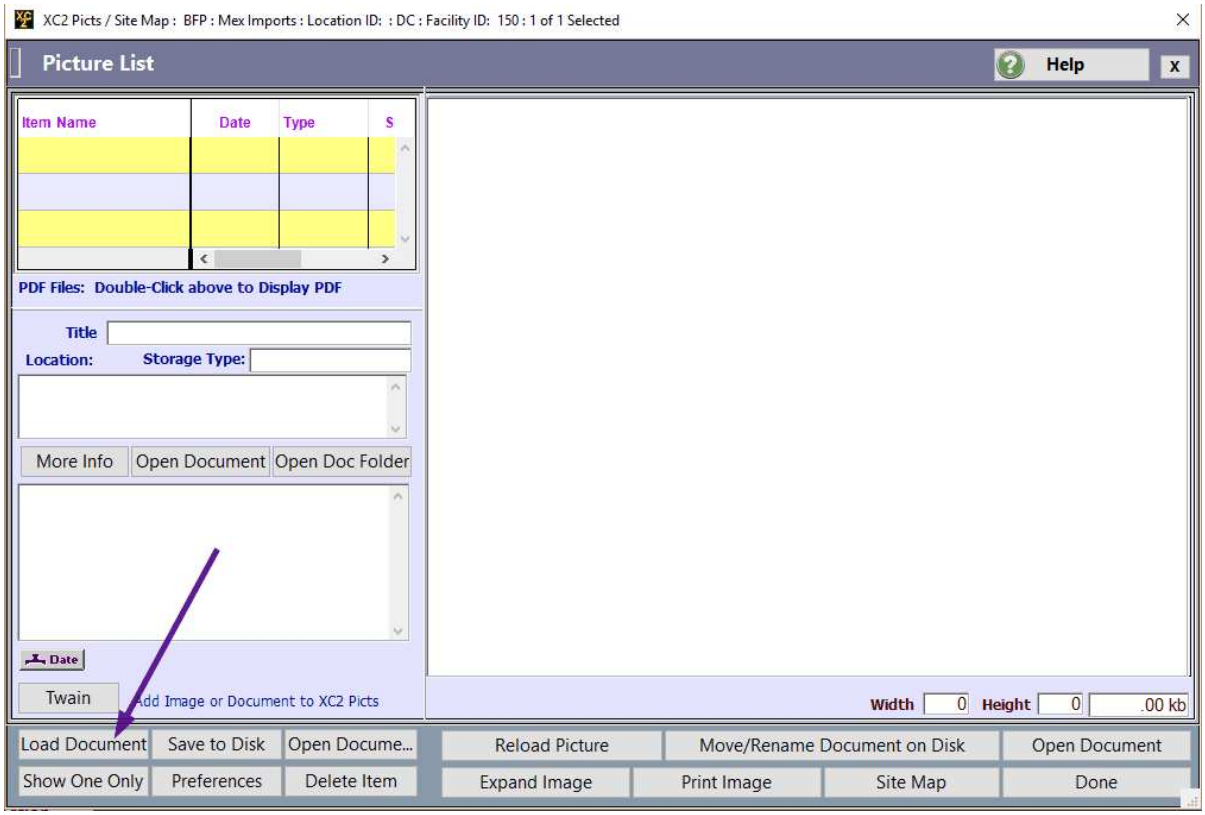
Click the button

Pictures/Site Map



Notes:

Load Document

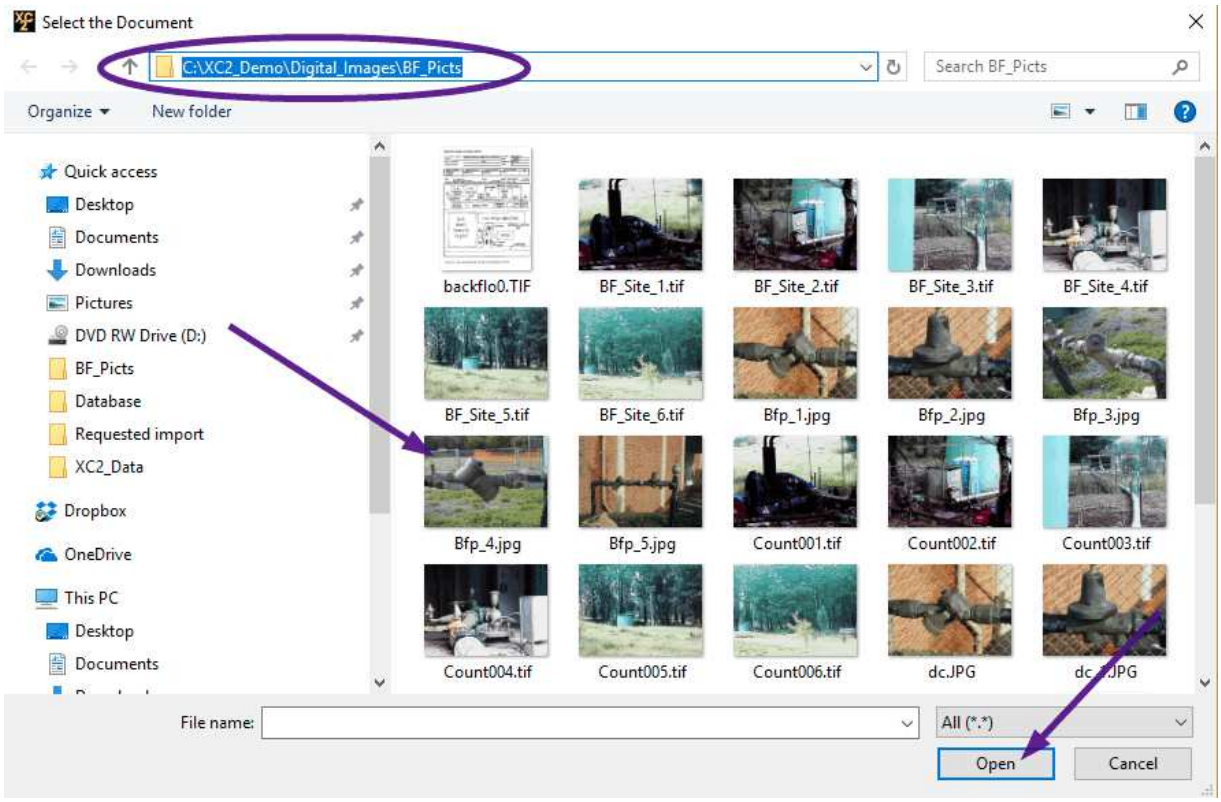


Notes:

Navigate to where your image is stored

When the windows explorer window opens.

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

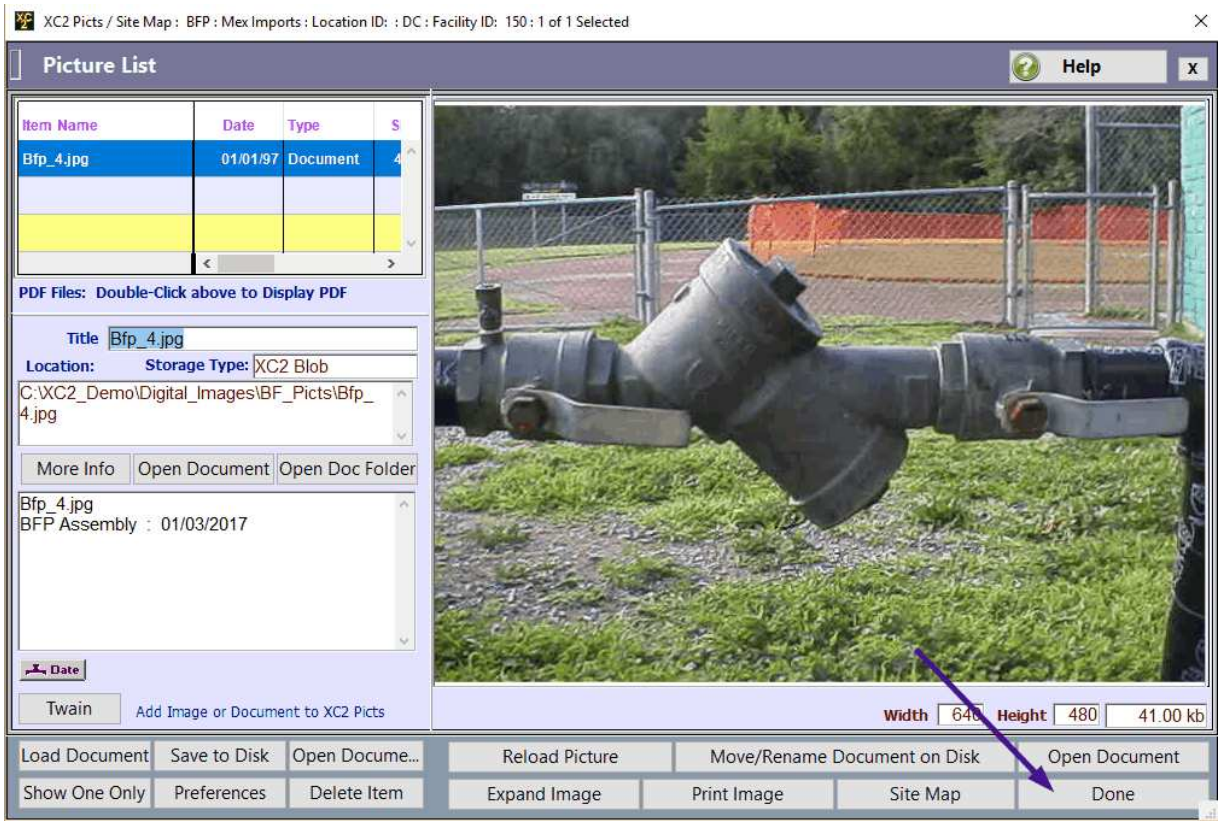


Notes:

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

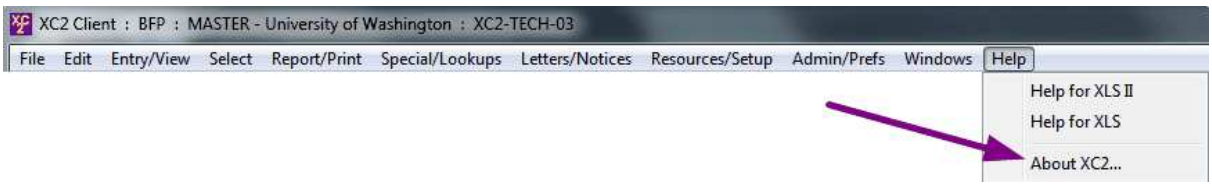
How To Update Backflow Models List

KB Asset ID: 1010

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

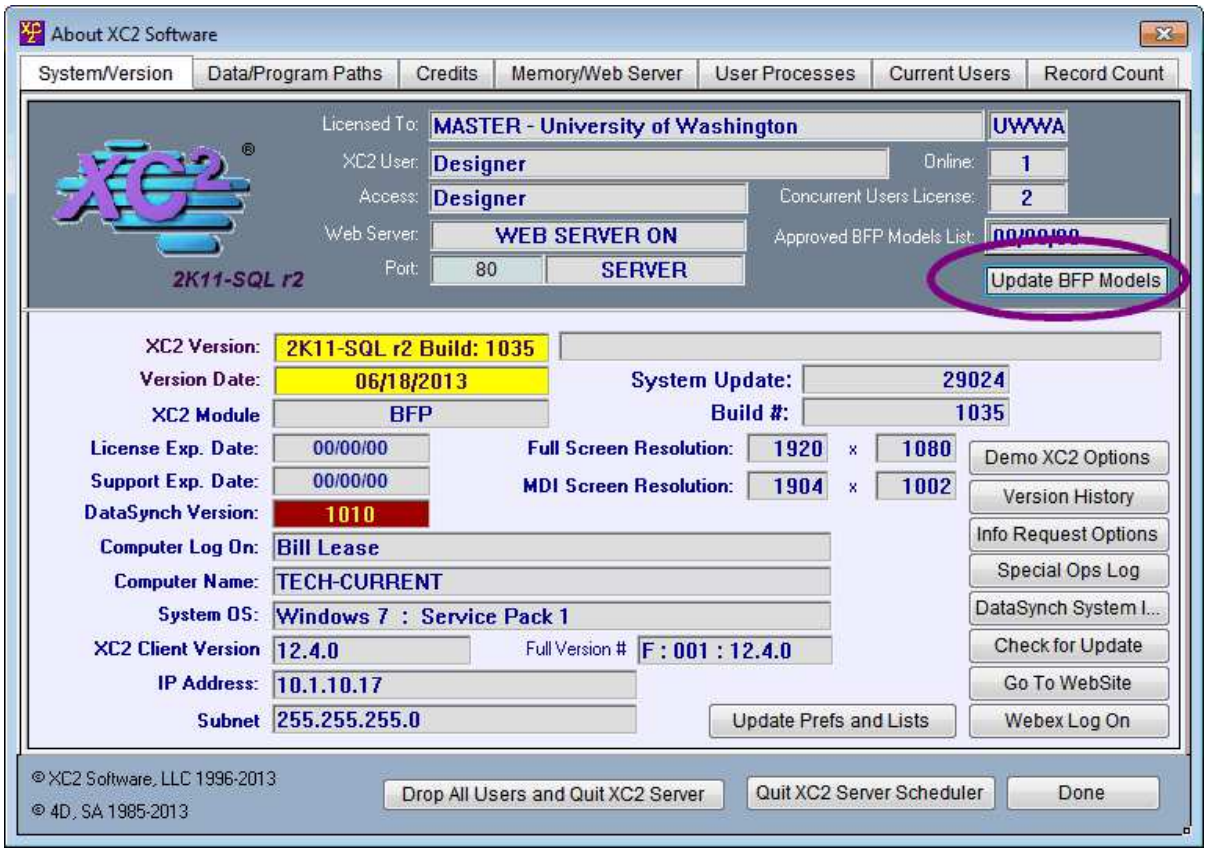
Quickly Update Your Backflow Models List

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



About XC2 Software Page

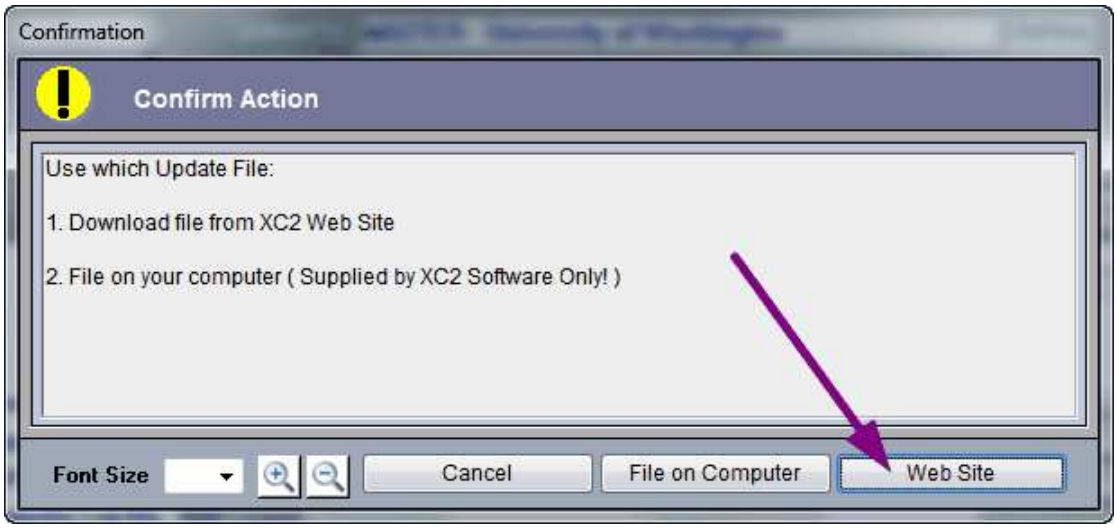
- Click Update BFP Models button



Notes:

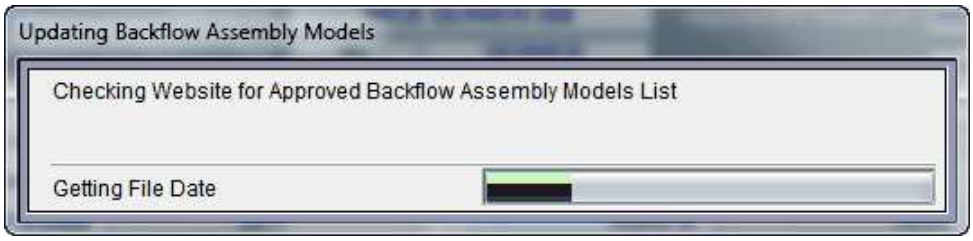
Update Options Page

- Click the Web Site button



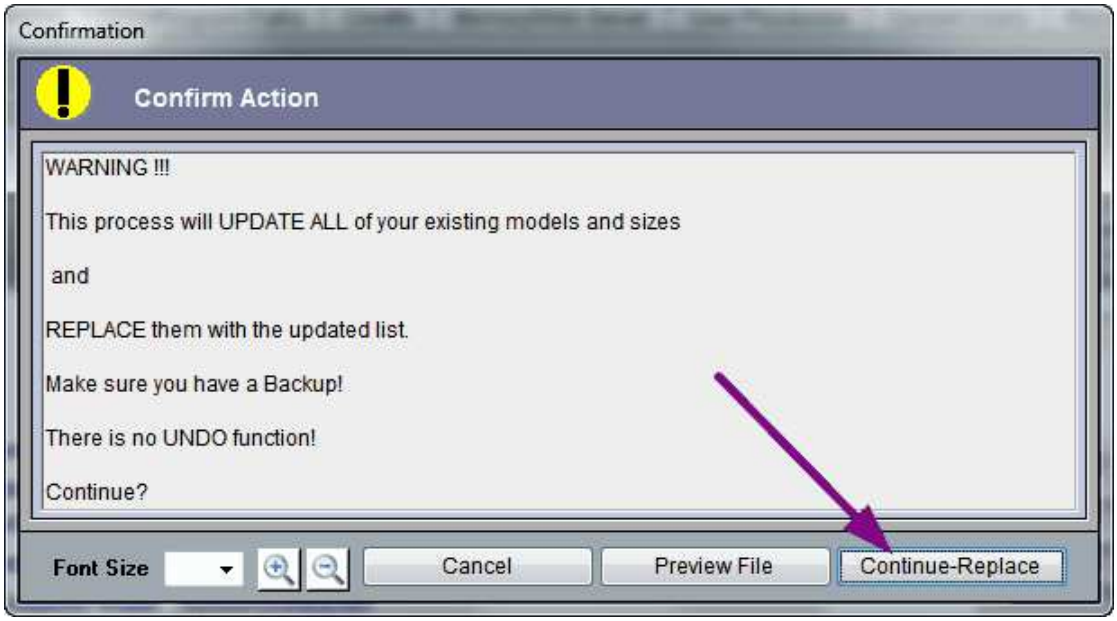
Notes:

Update Processs Begins



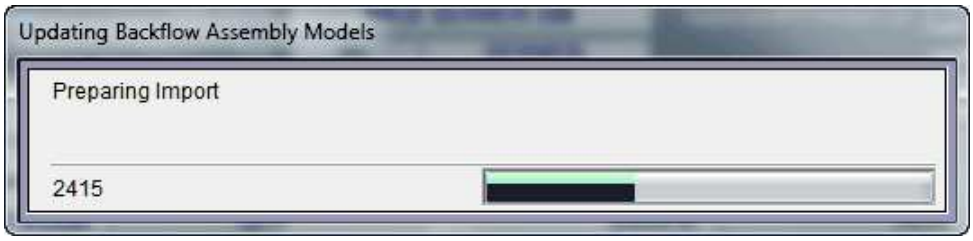
Continue

- Click Continue Replace



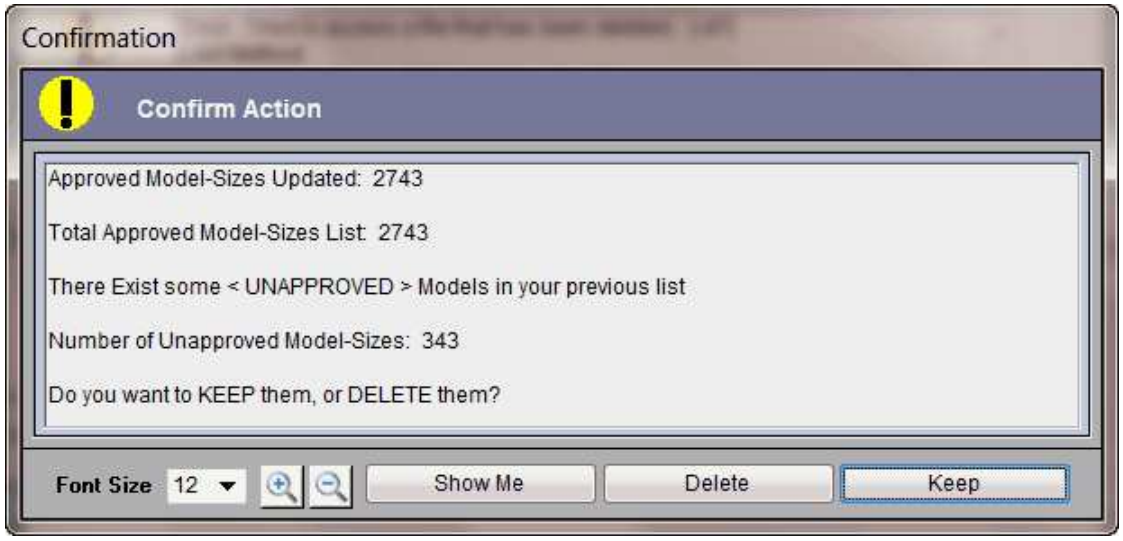
Notes:

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

#	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

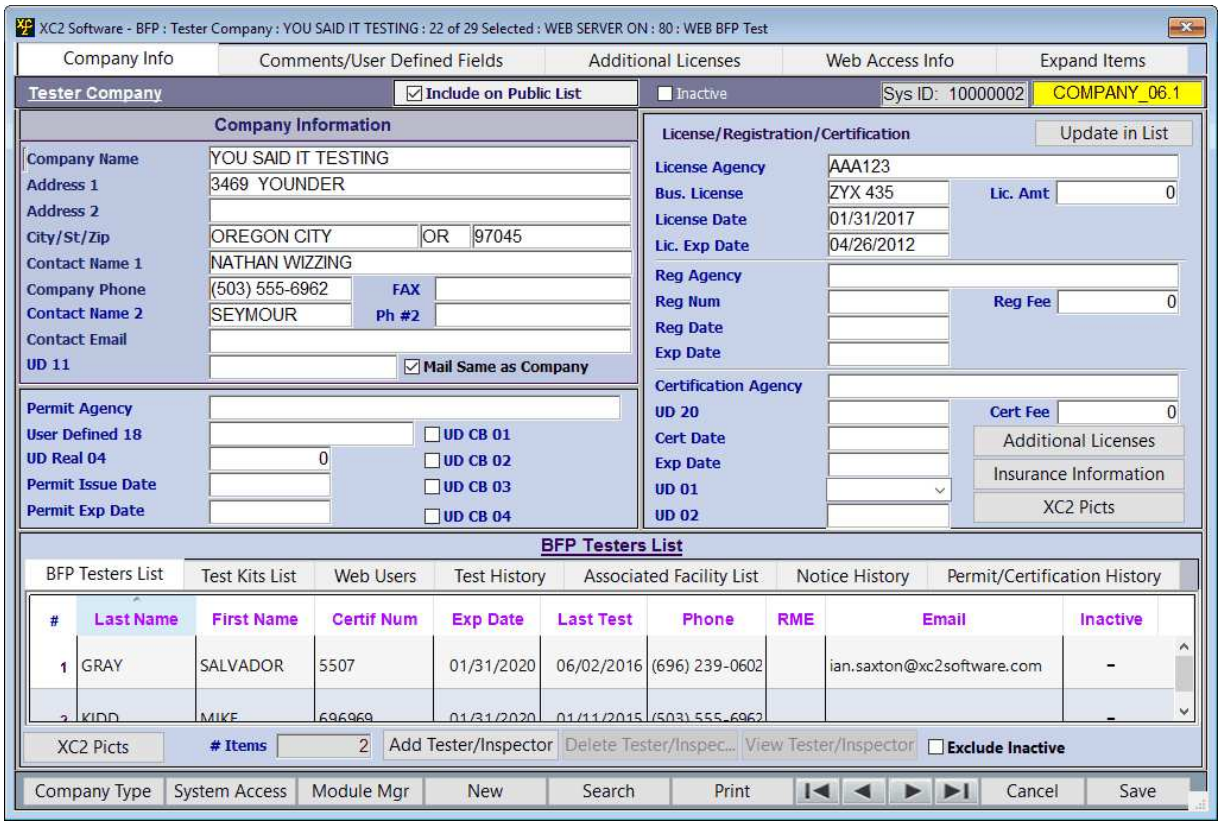
Test Company Screen

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.



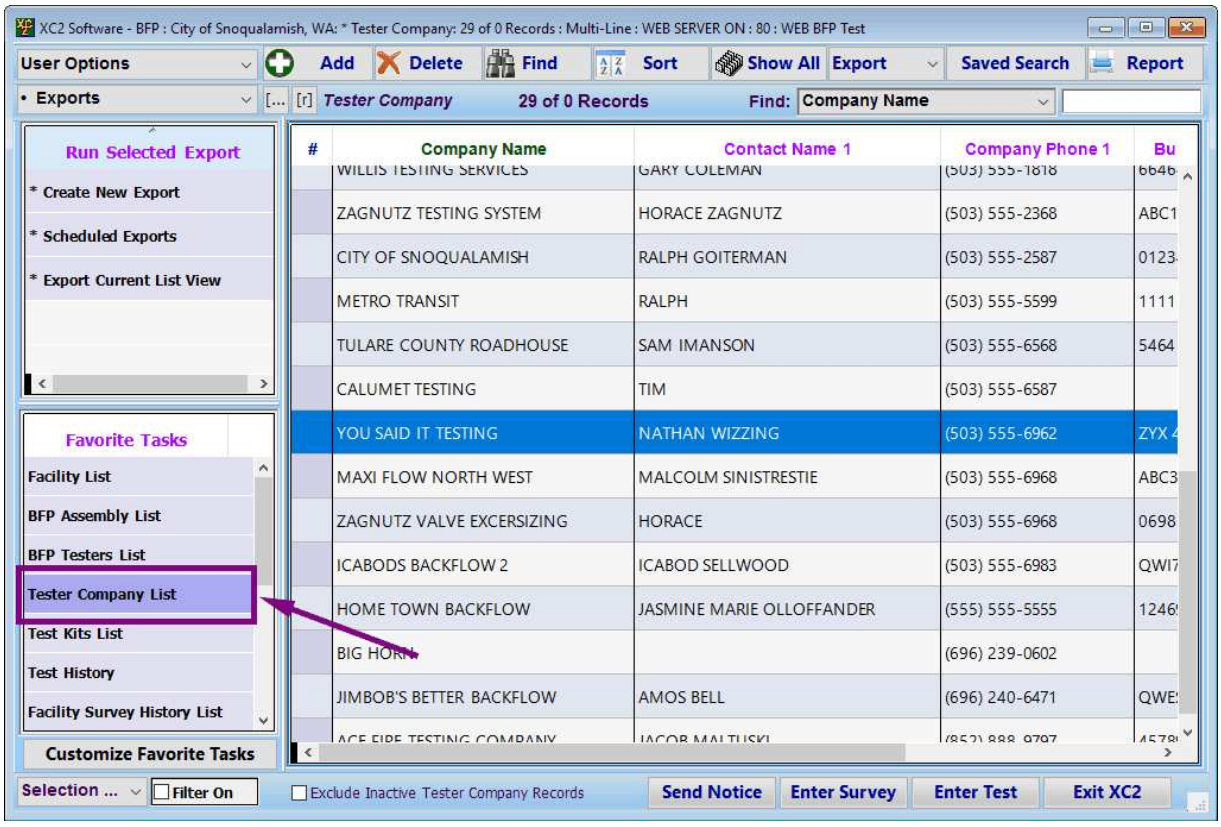
Notes:

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



Notes:

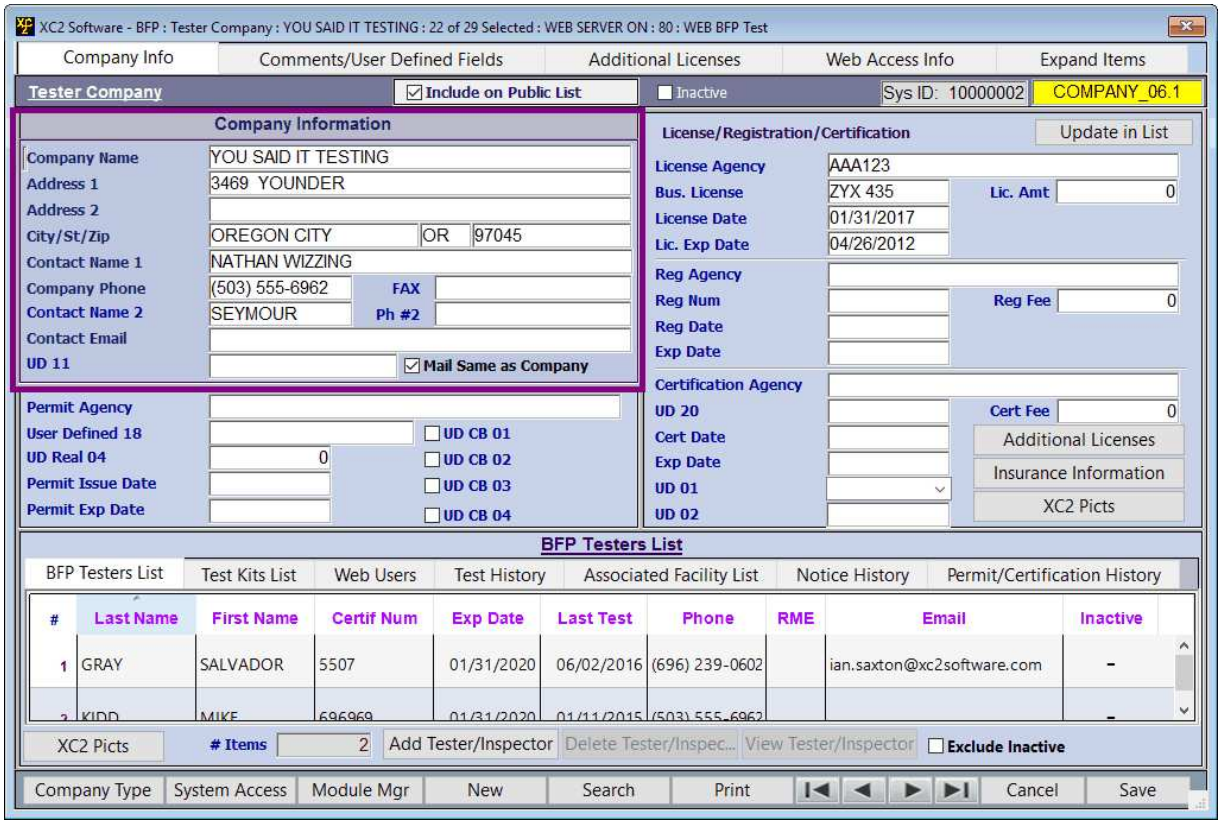
Company Info

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



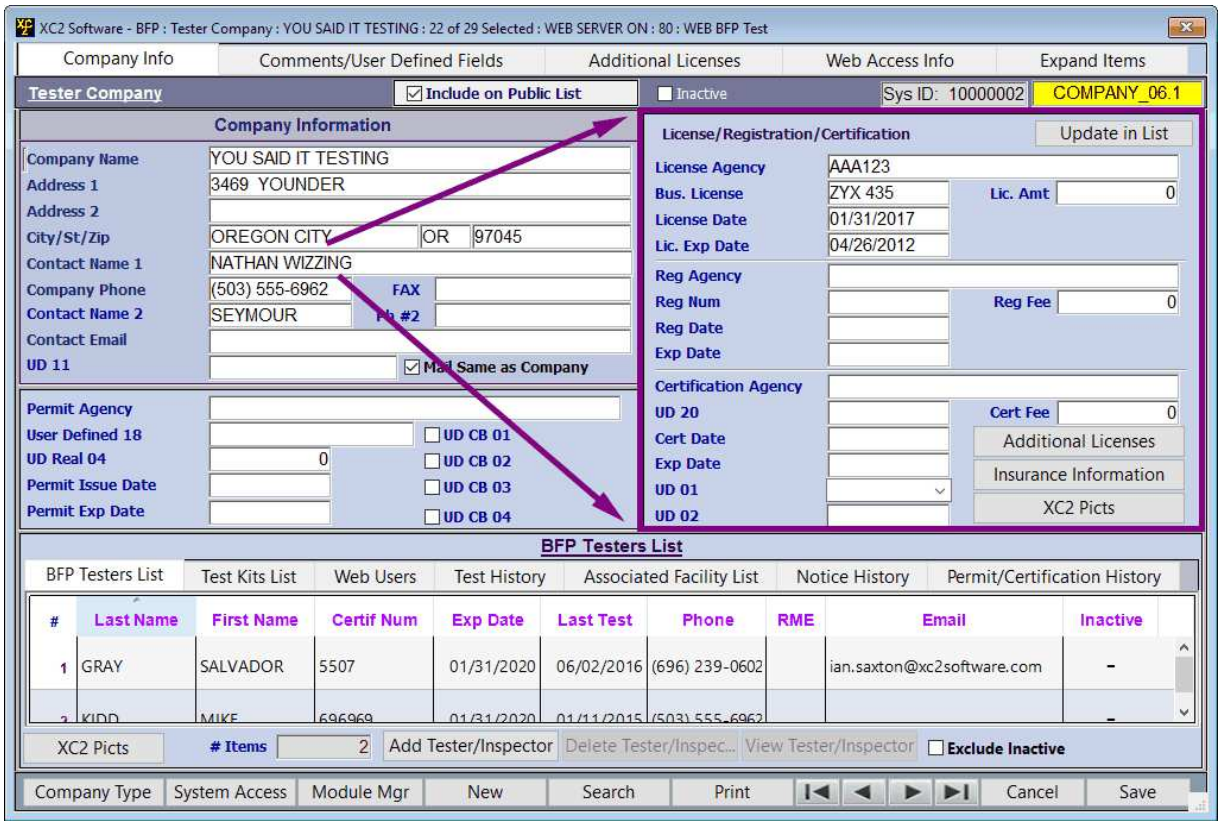
Notes:

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



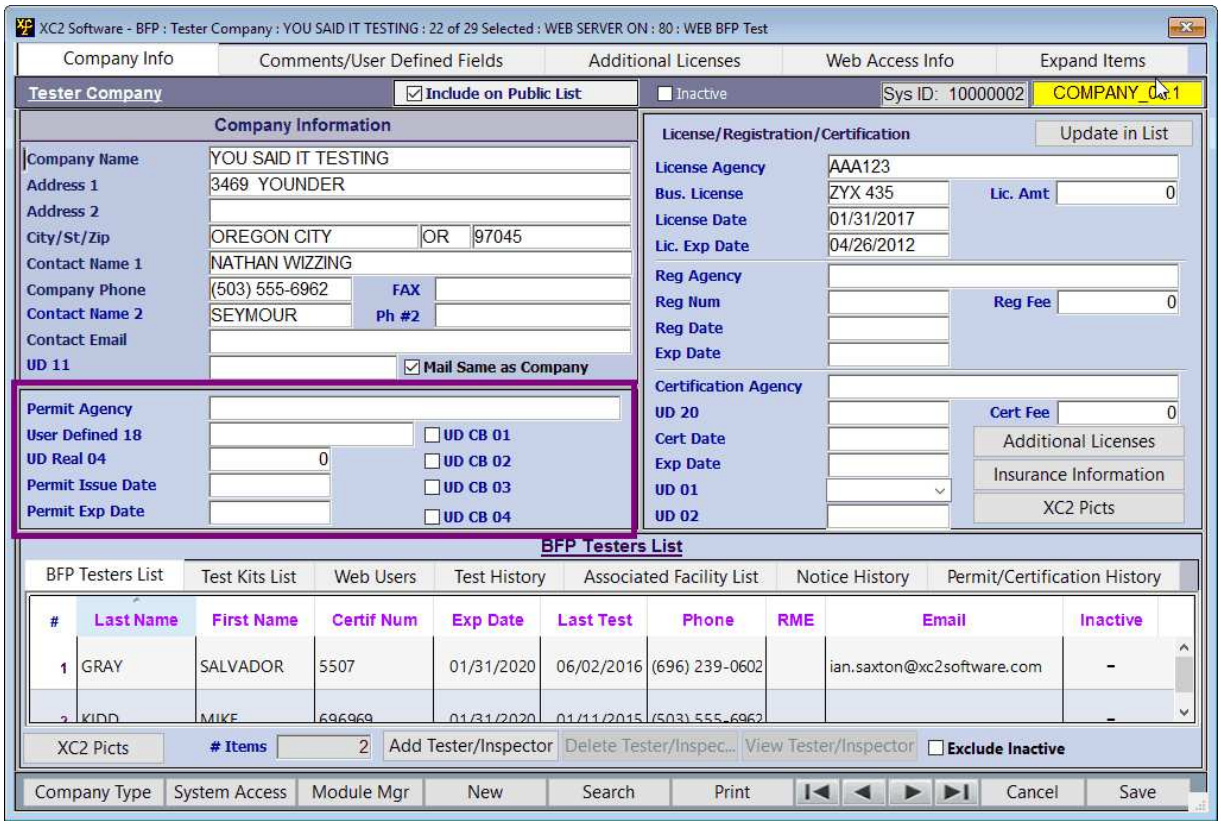
Notes:

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



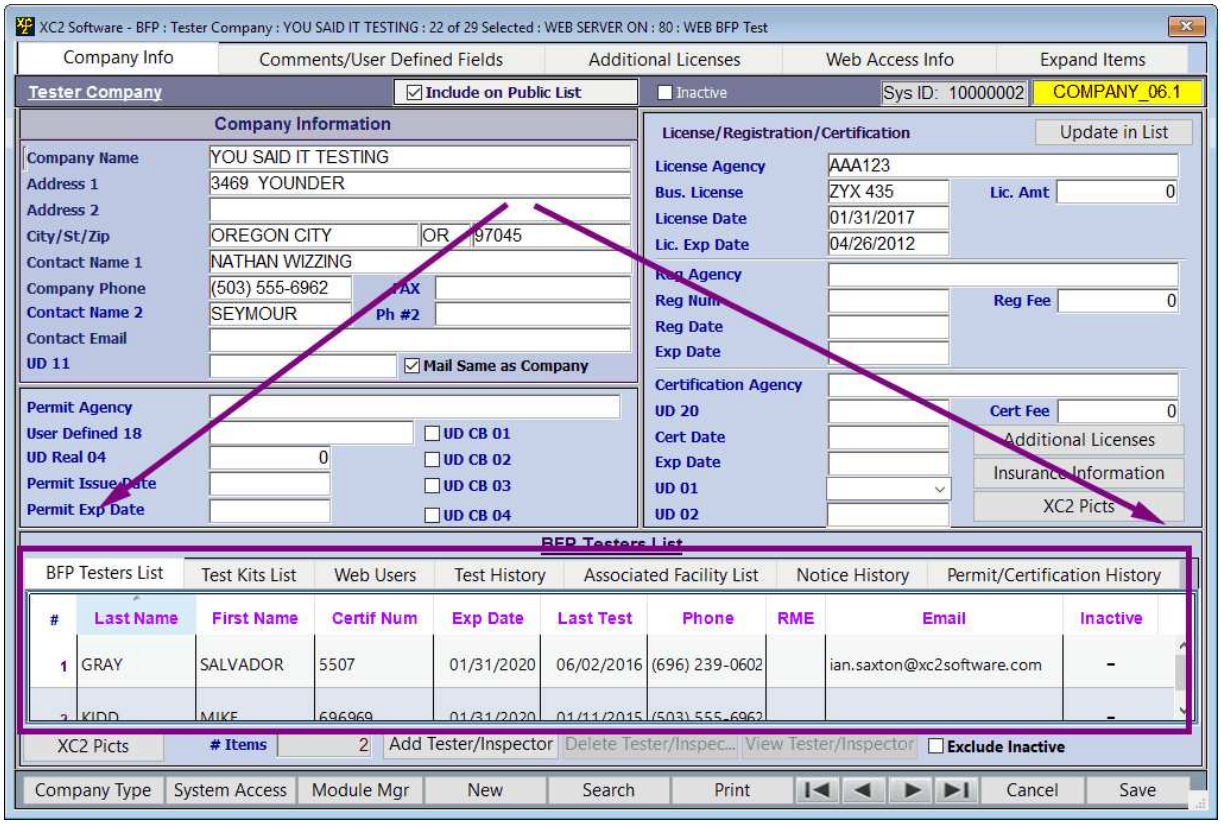
Notes:

Associated Records Area

The Bottom Portion is your Associated Records Area.

Associated Records for a company includes

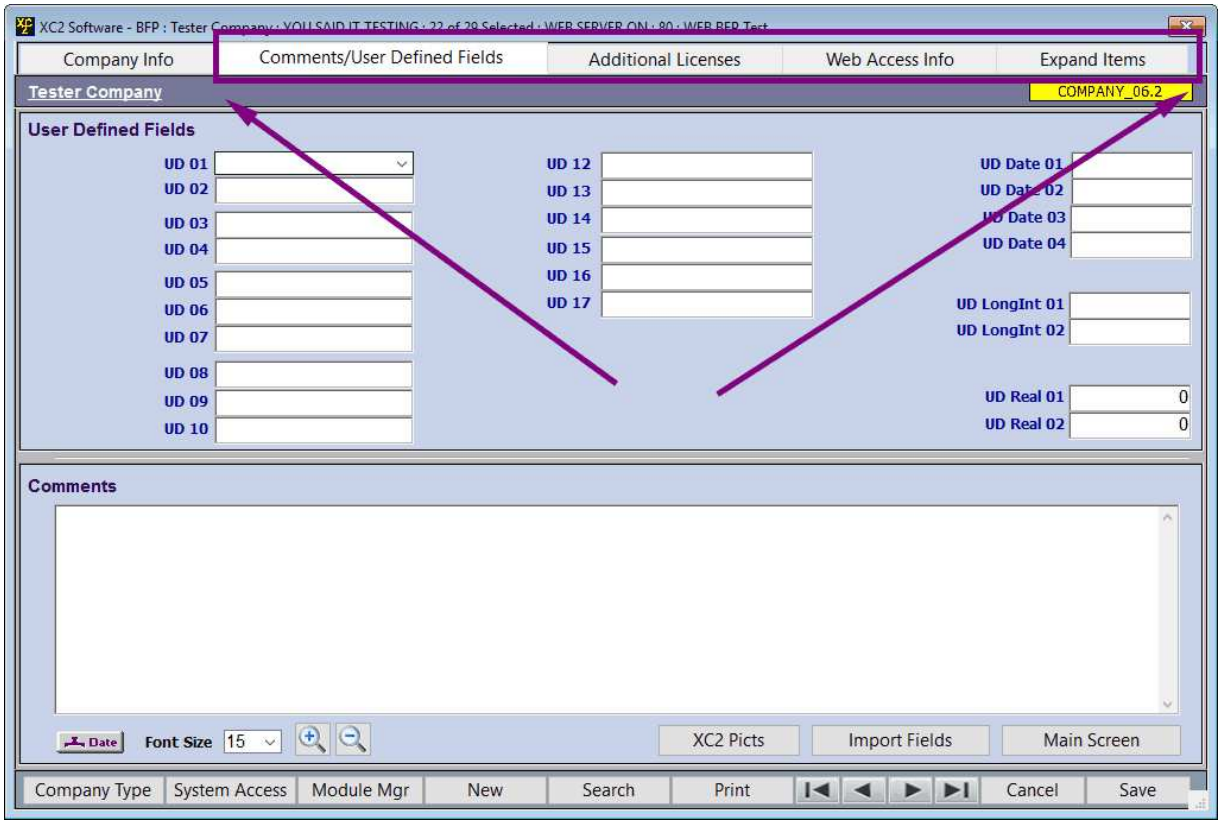
1) Testers List
2) Test Kit List
3) Web Users (optional)
4) Test History
5) Associated Facilities (Assigned Facilities)
6) Notice History
7) Permit Certificate History



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

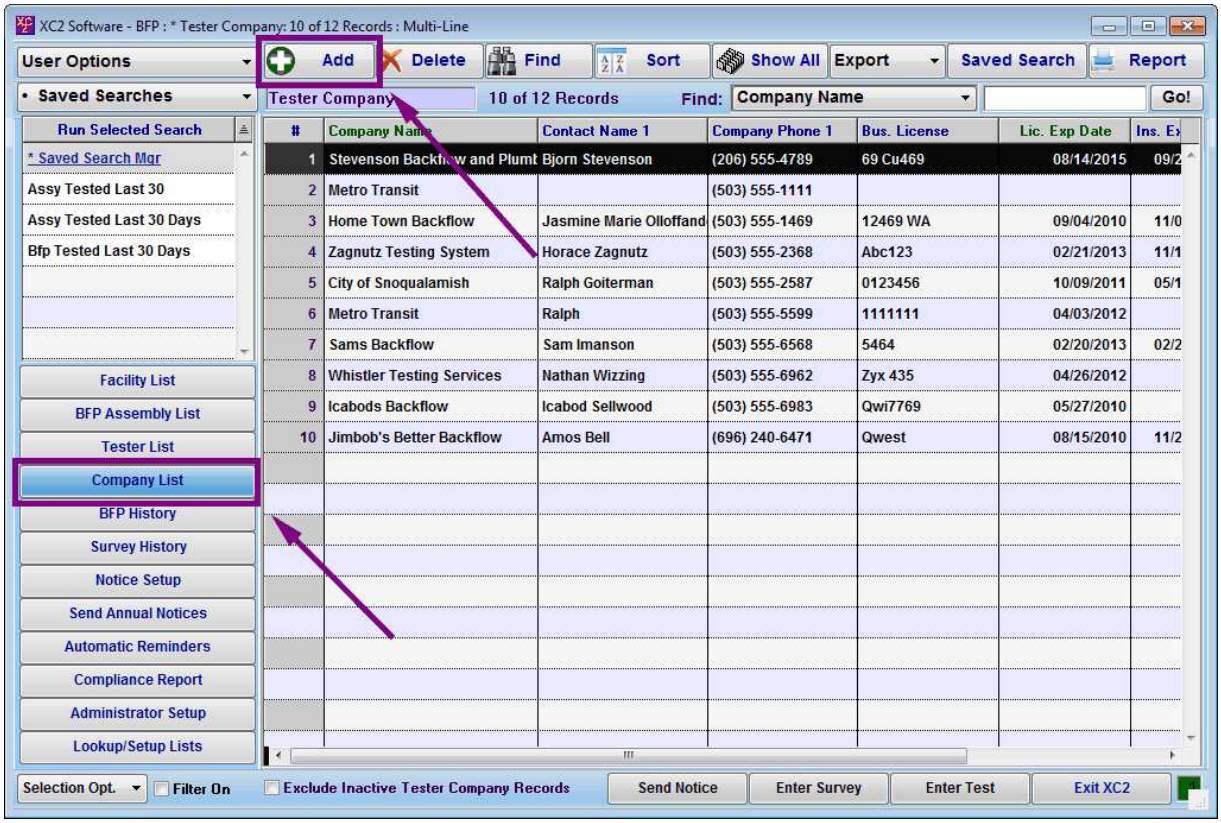
How to Create a New Company Record

KB Asset ID: 2599

Describes how to create a new company record

Click on Company List

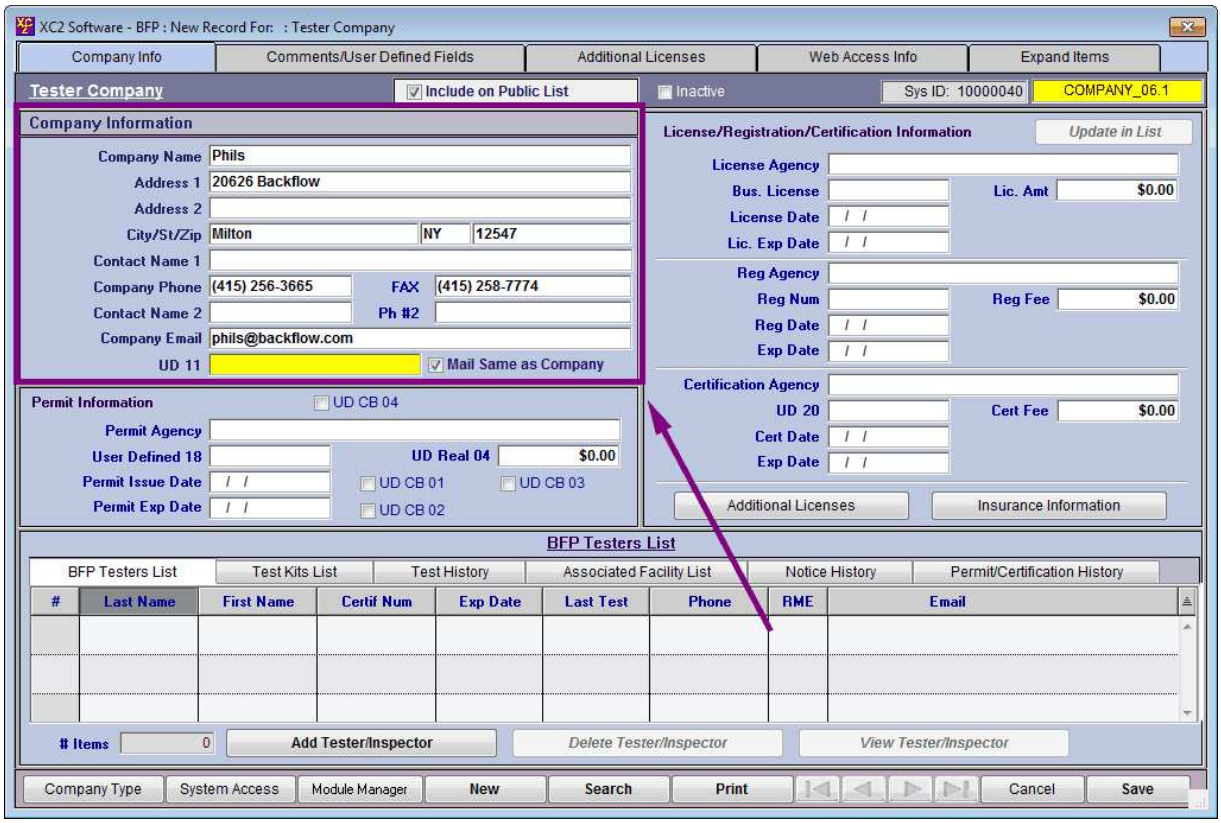
Click on the Company List then click Add.



Notes:

Enter Company Information

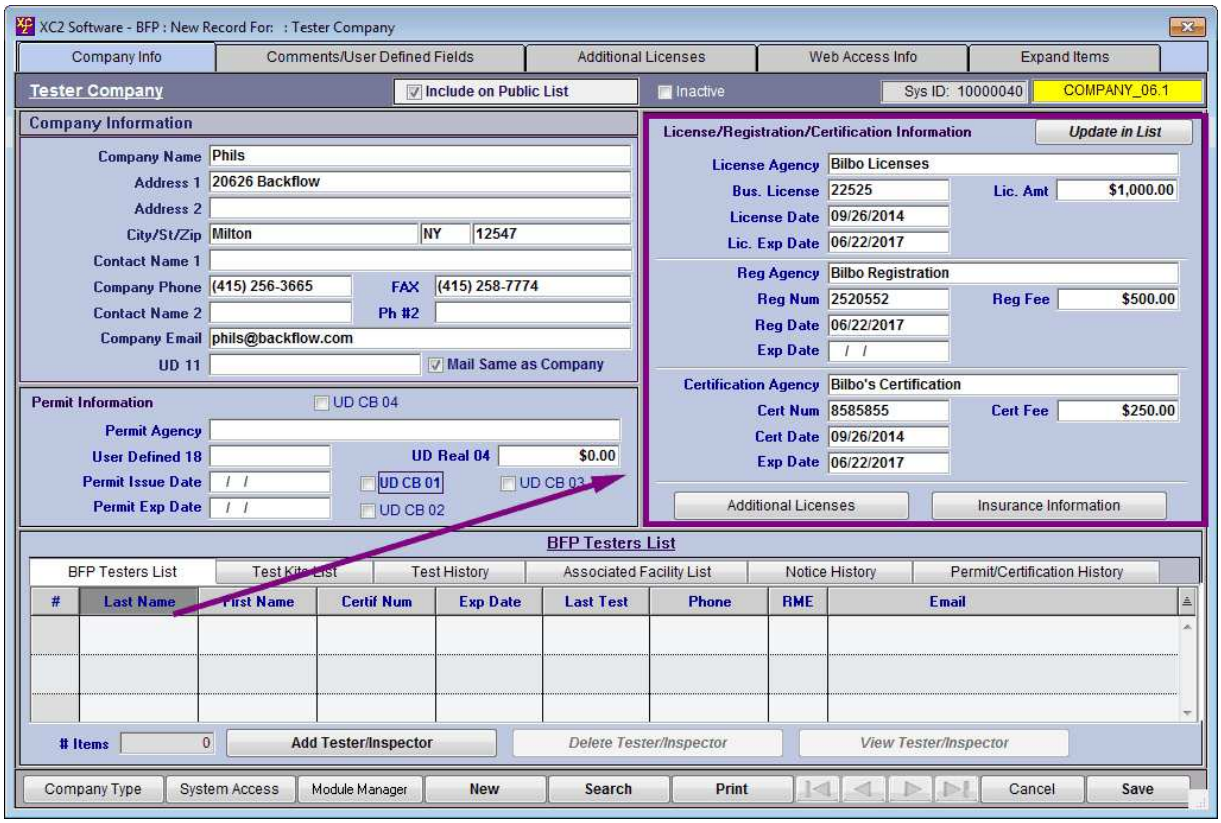
Enter basic company information



Notes:

Enter License, Registration and Certification Info

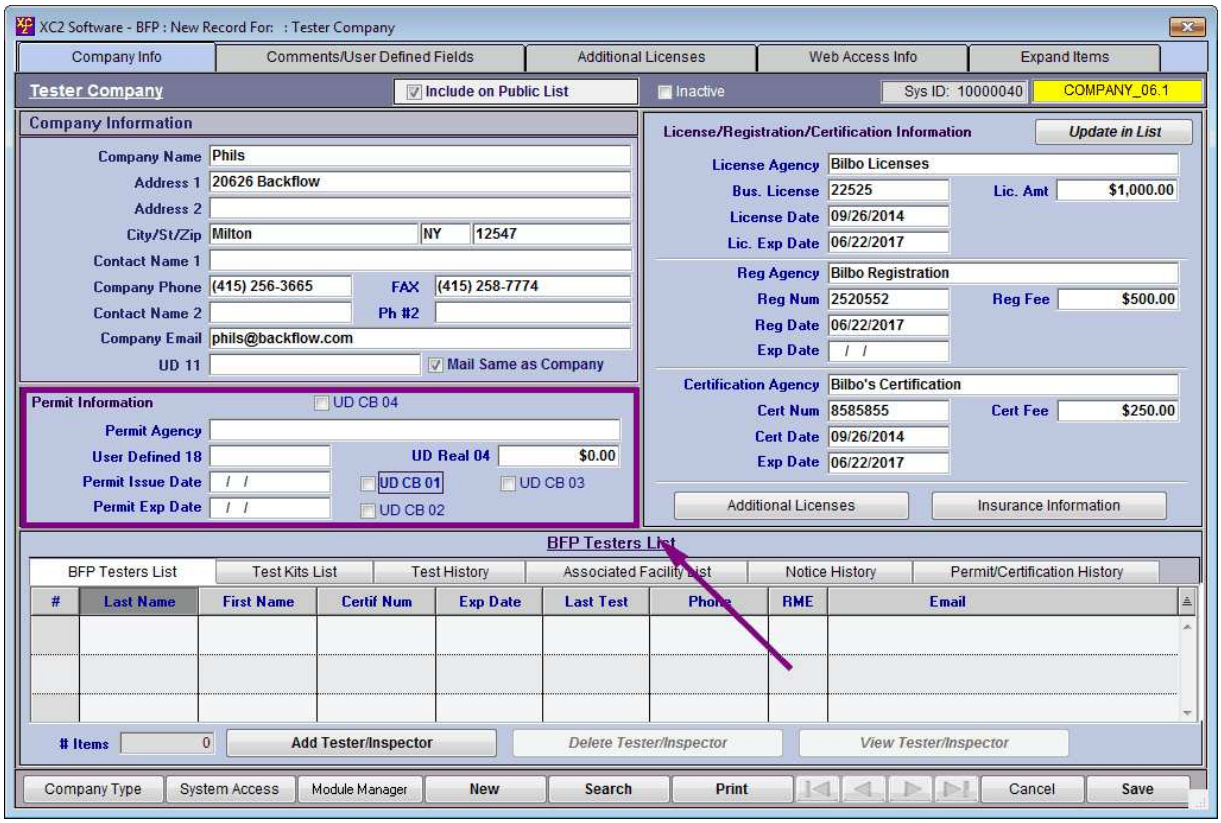
Enter all license registration and certification info that you may have



Notes:

Permit Information

Enter any Permit information that you may have



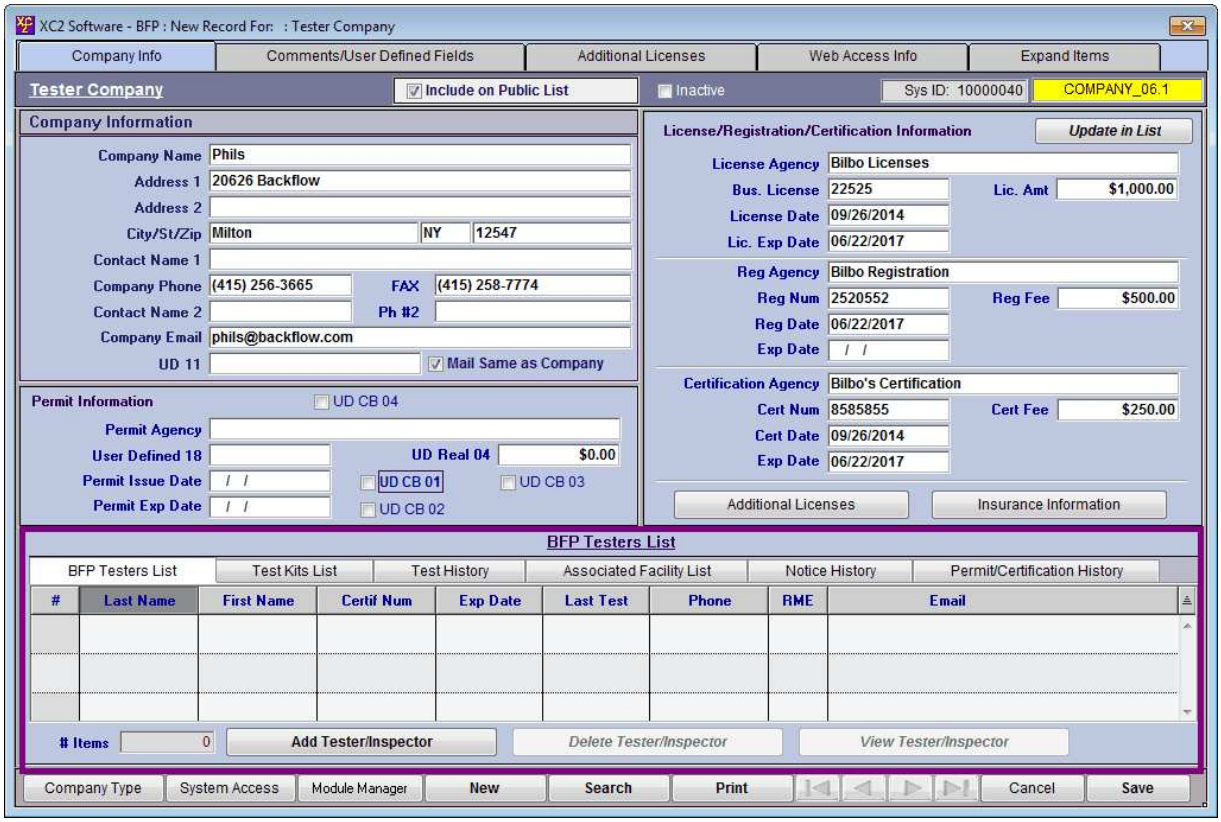
Notes:

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

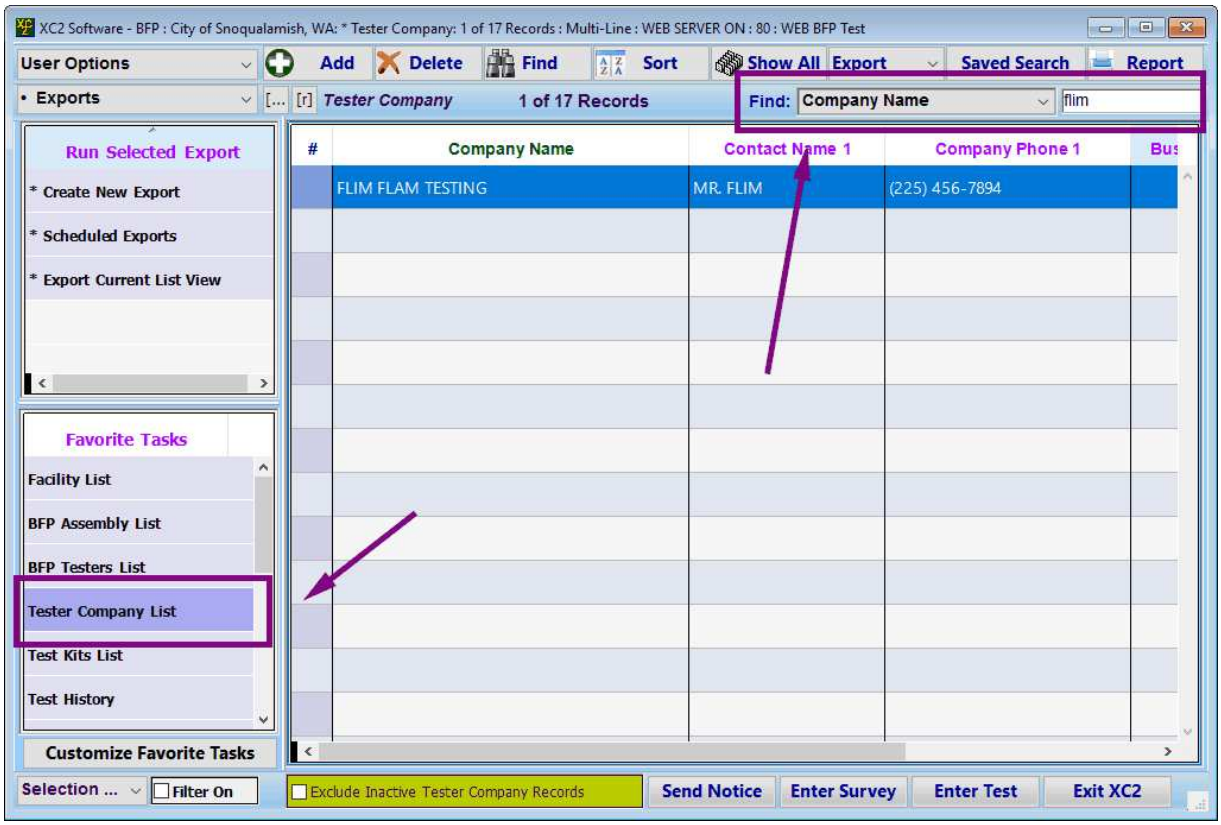
KB Asset ID: 3604

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

Search For Company Record

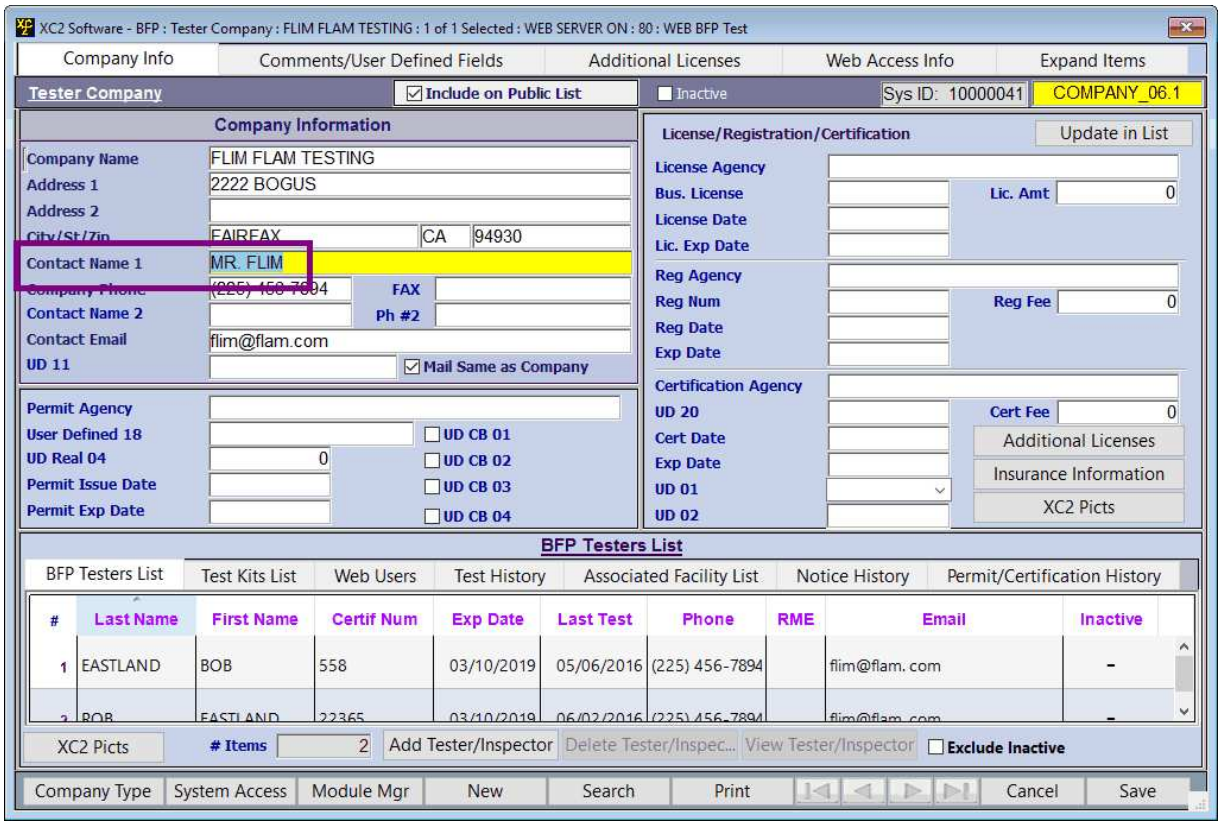
From The Main Screen Select your company list and search for the company that you would like to edit

Double click the record to open



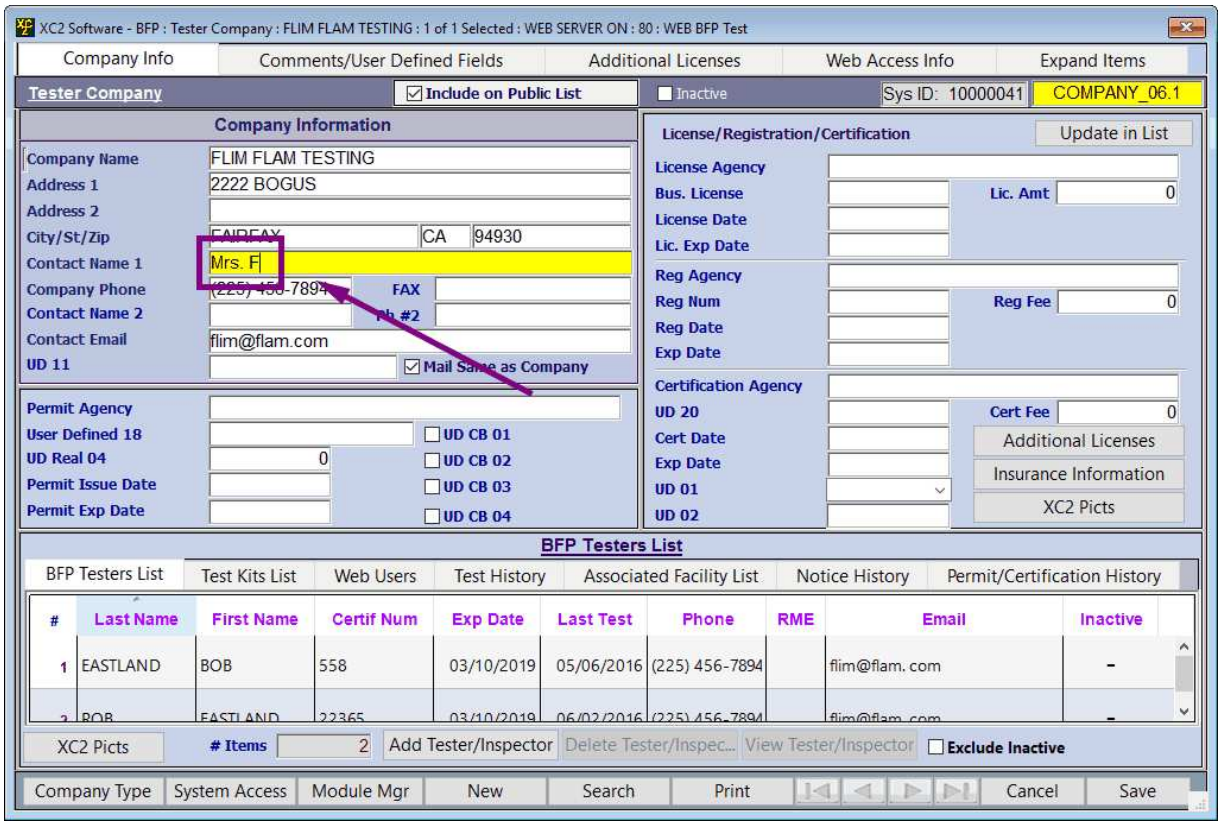
Notes:

Highlight the field that you would like to Edit



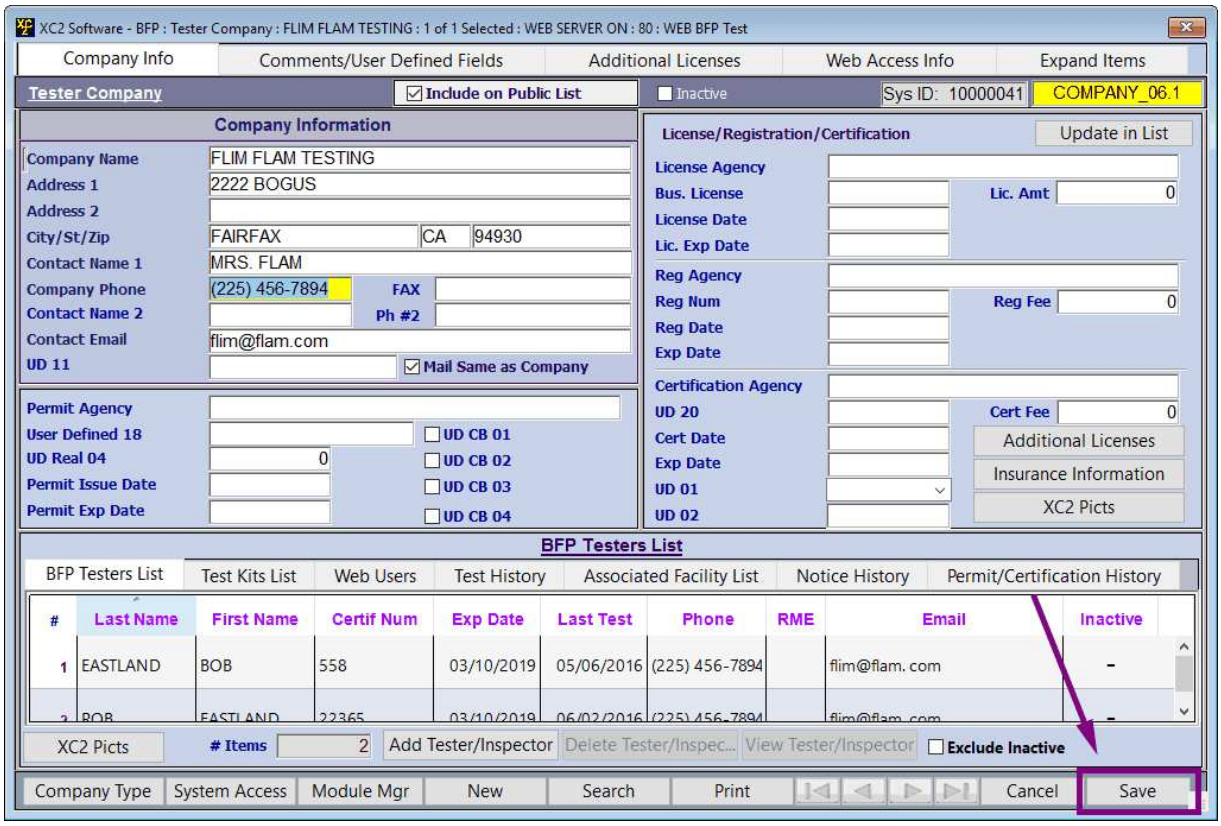
Notes:

Type the Changes in the field



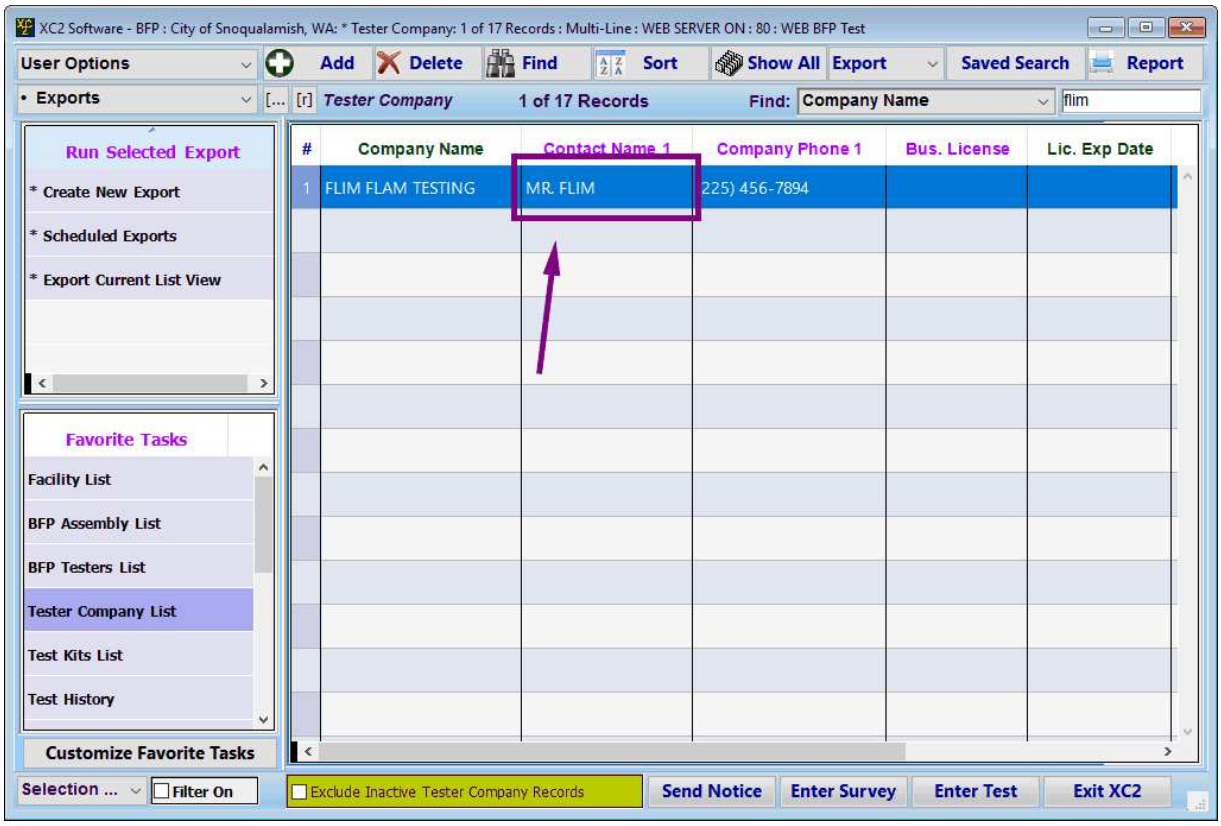
Notes:

Click Save when you are Complete



Notes:

Changes will be Complete



Notes:

XC2 Software Knowledge Base

How to inactivate a company record in XC2 Backflow

KB Asset ID: 3064

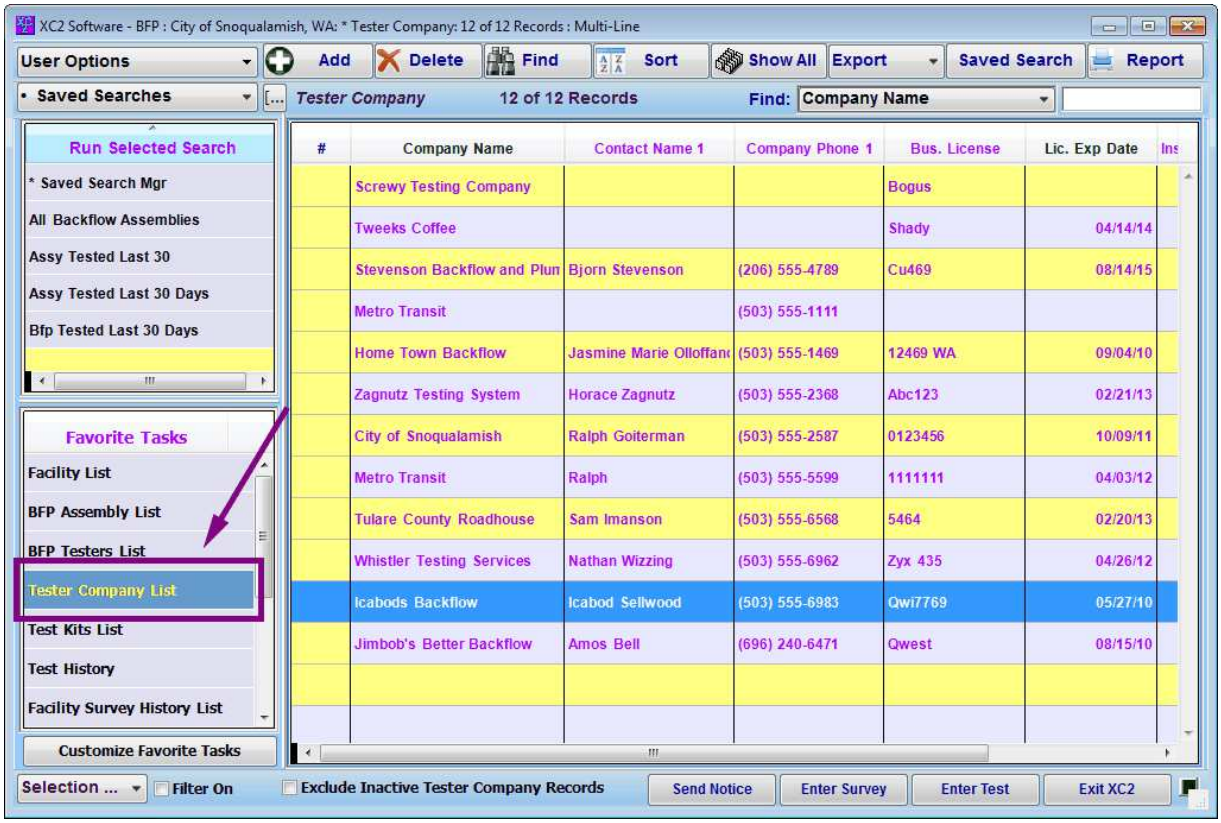
This page descirbes how to inactivate company records in XC2 Backflow

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

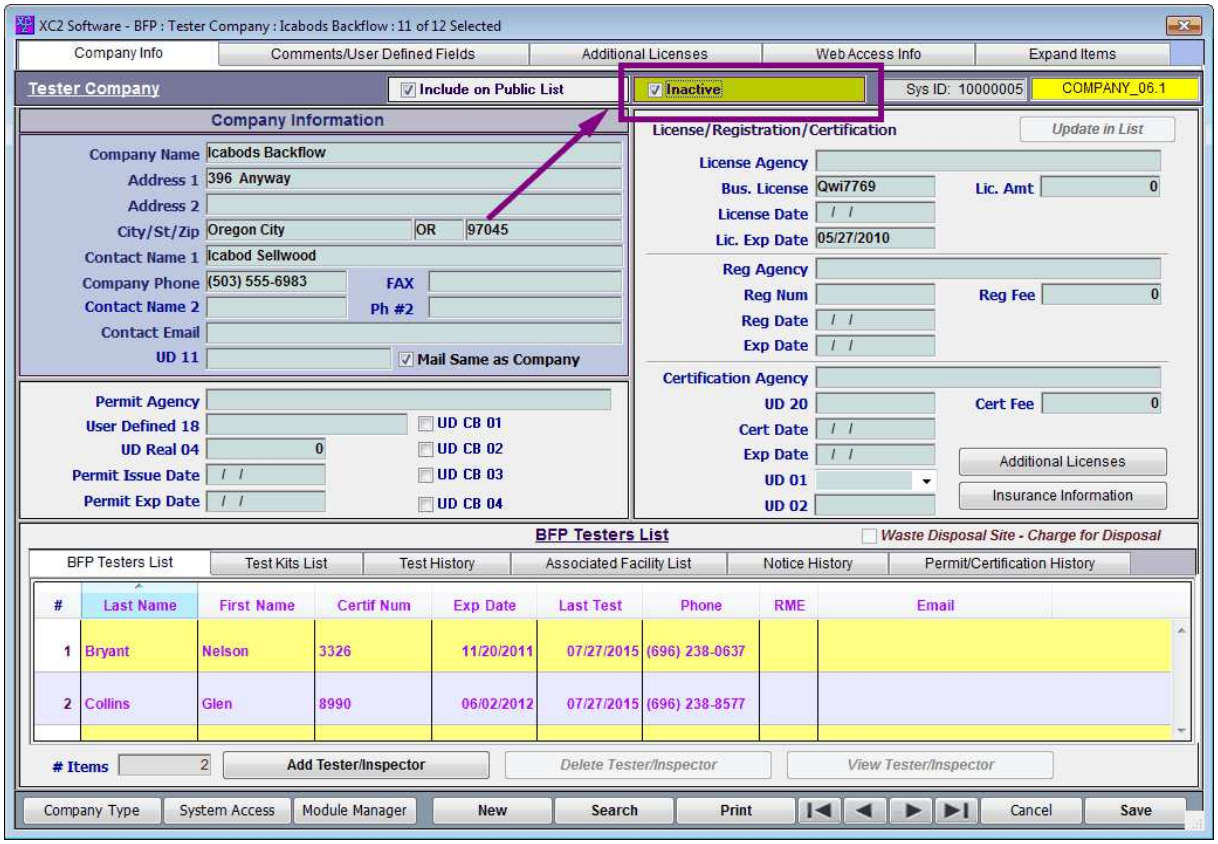


Notes:

Inactive Checkbox

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

When checked, the company will be made inactive



Notes:

XC2 Software Knowledge Base

How to Change the Company Type in XC2 Backflow

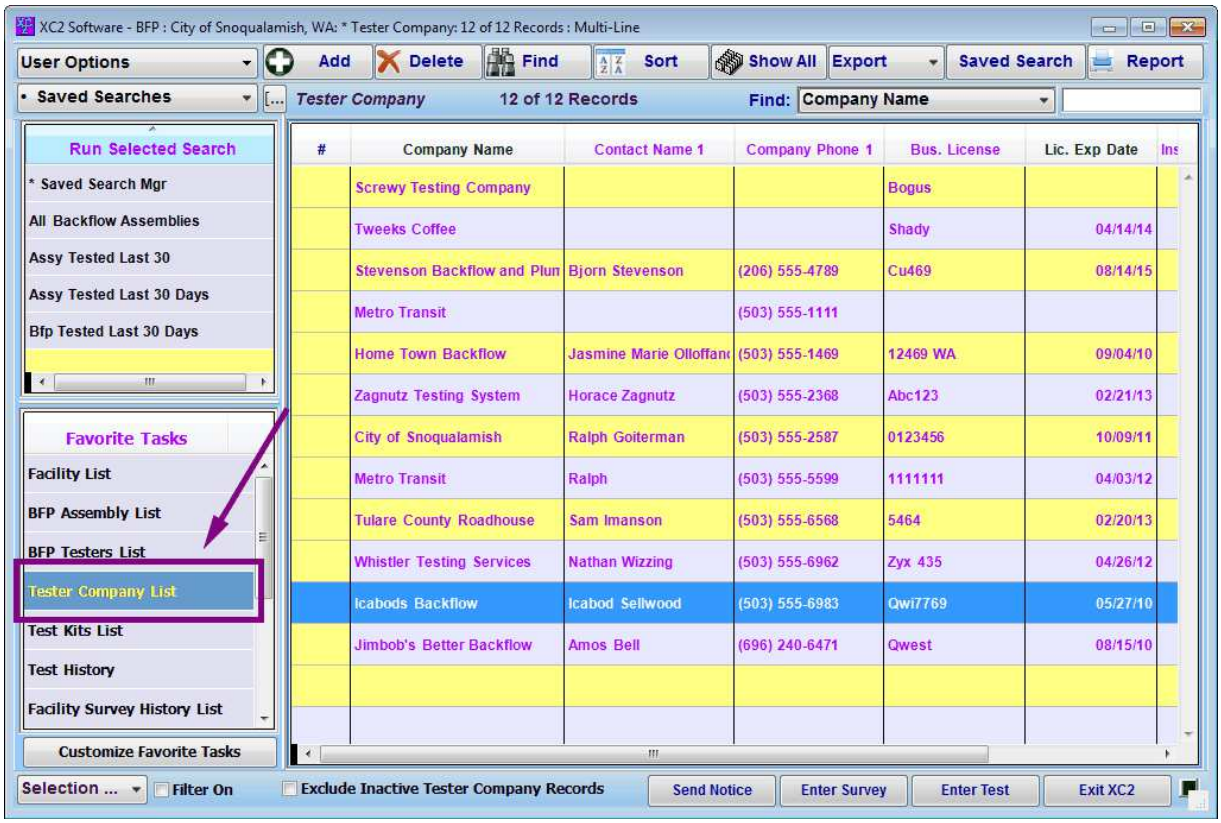
KB Asset ID: 3063

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

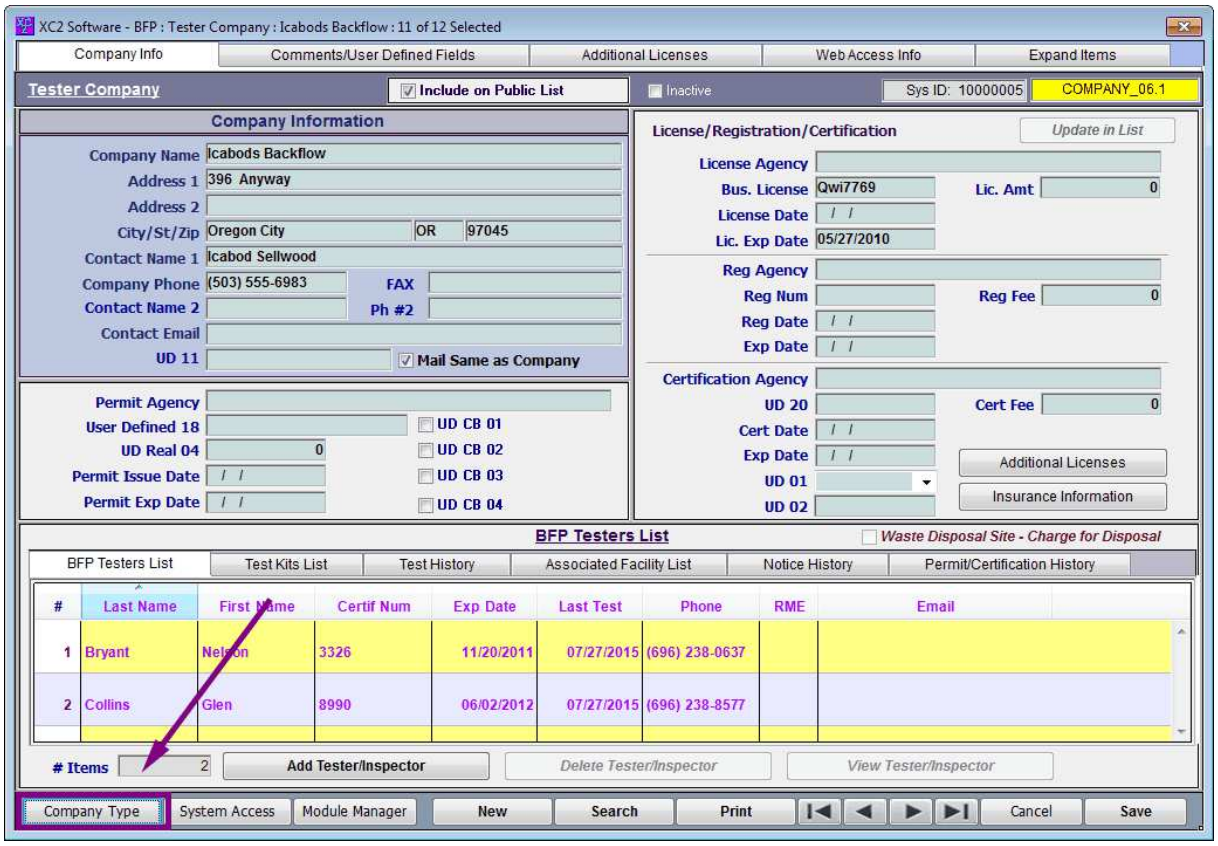
Search for the company and open the company record



Notes:

In company record

Inside the company record, click company type



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

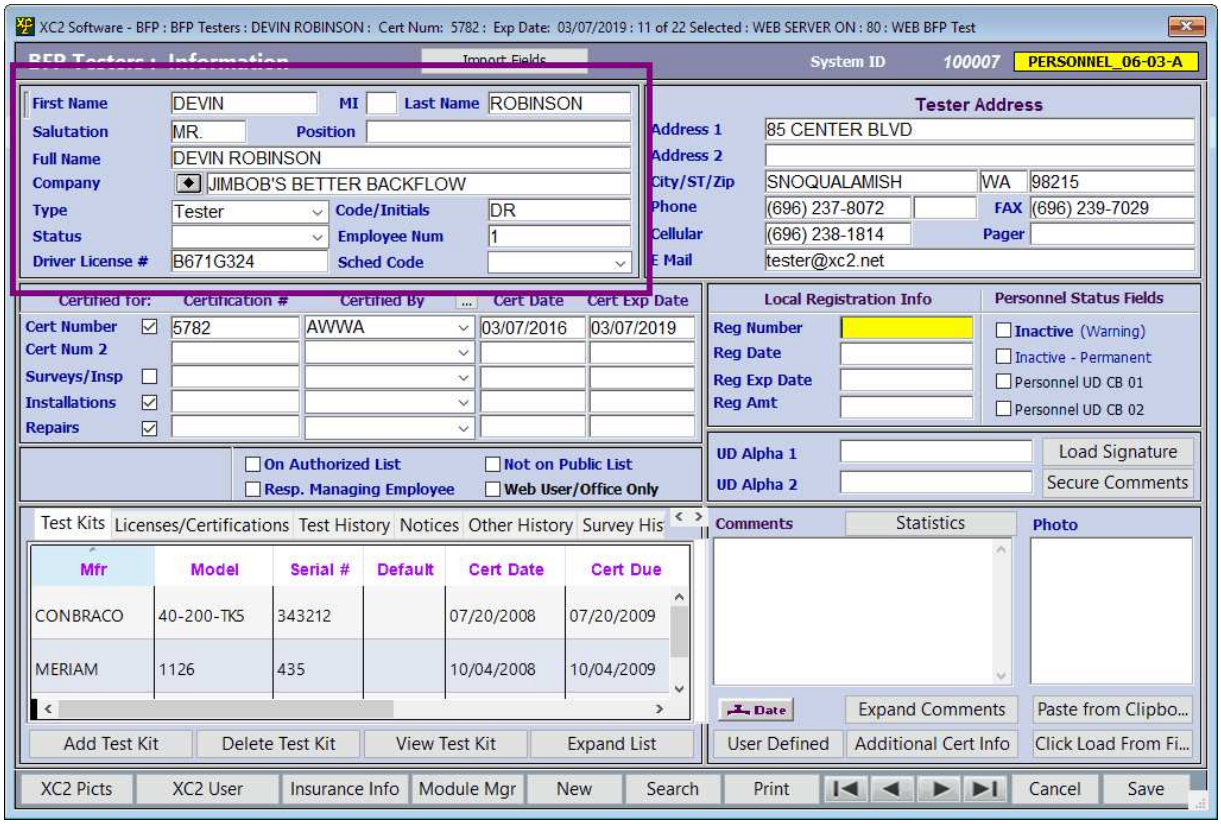
KB Asset ID: 3605

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

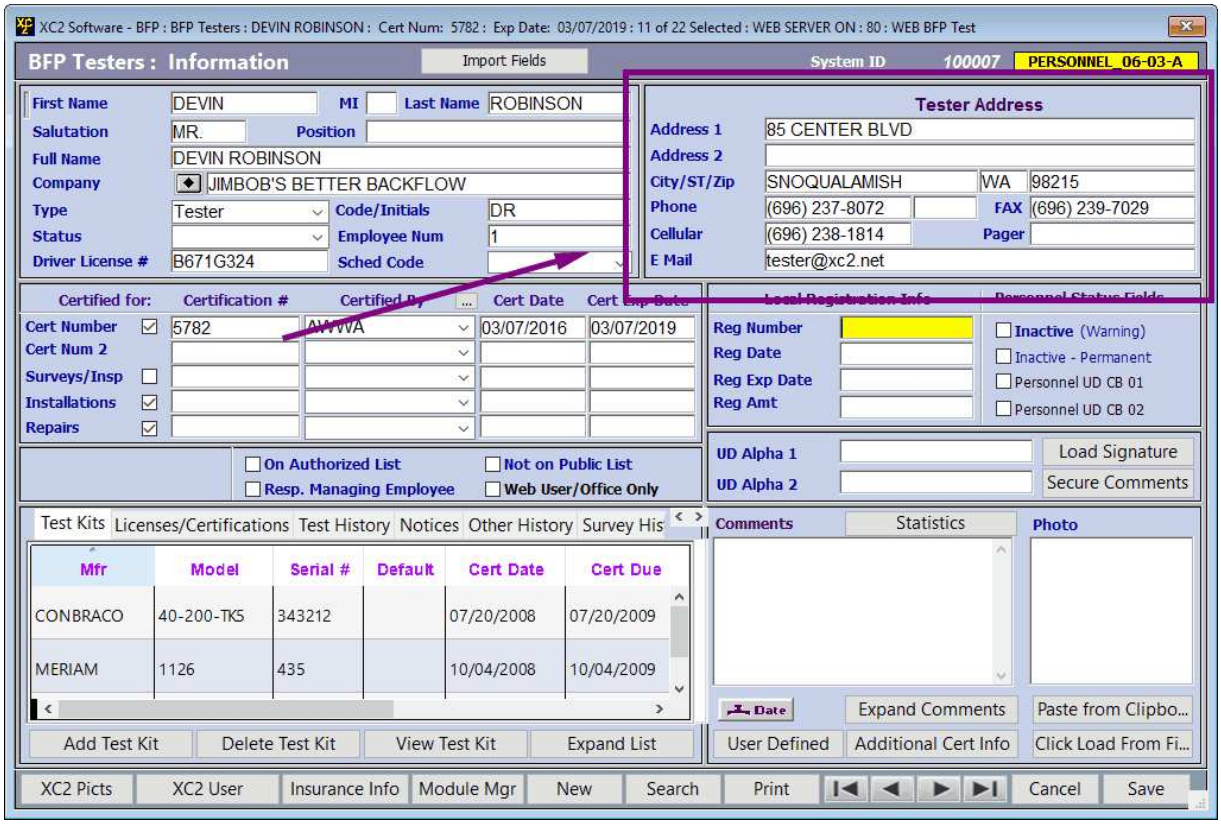


Notes:

Tester Address Information

The Top right corner is the Testers Address information.

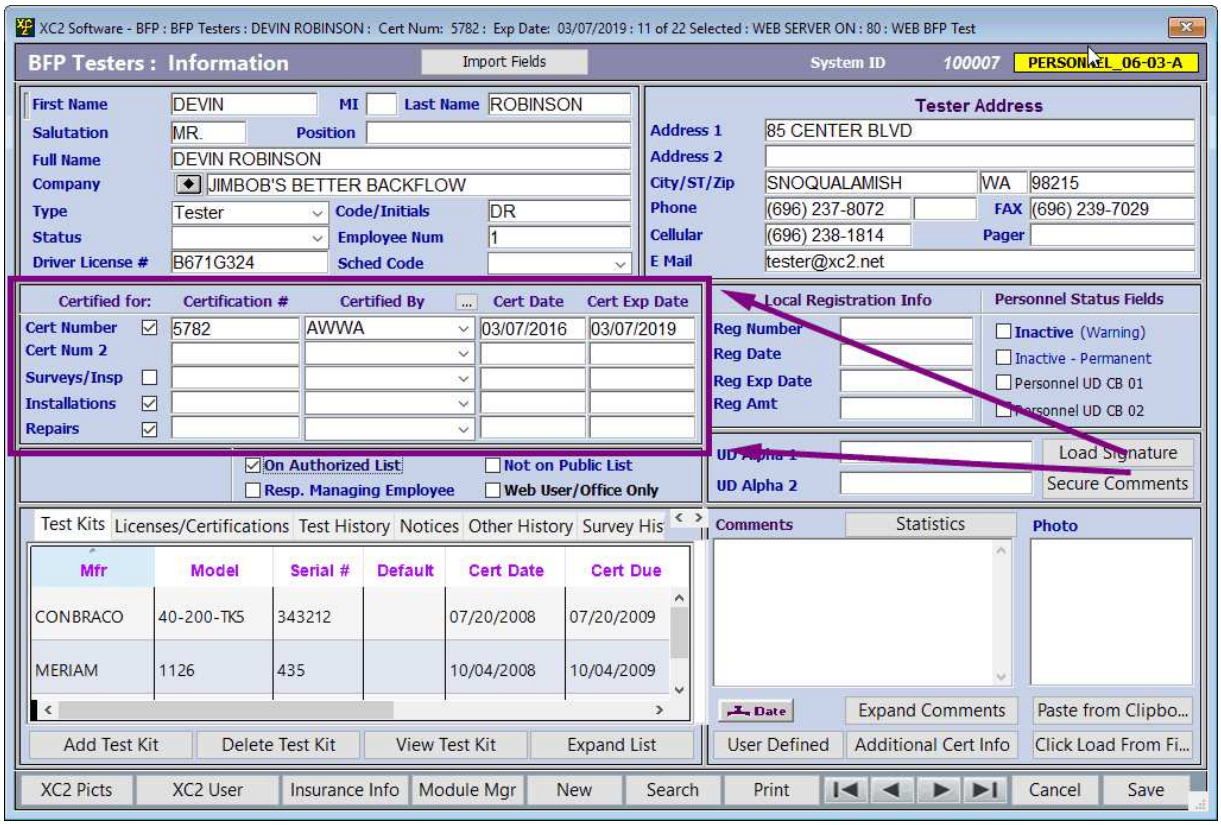
Though this address can be the cans as the company address, it can also be different from the company address.



Notes:

Certification Information

Tester Certification information should be entered into this area.



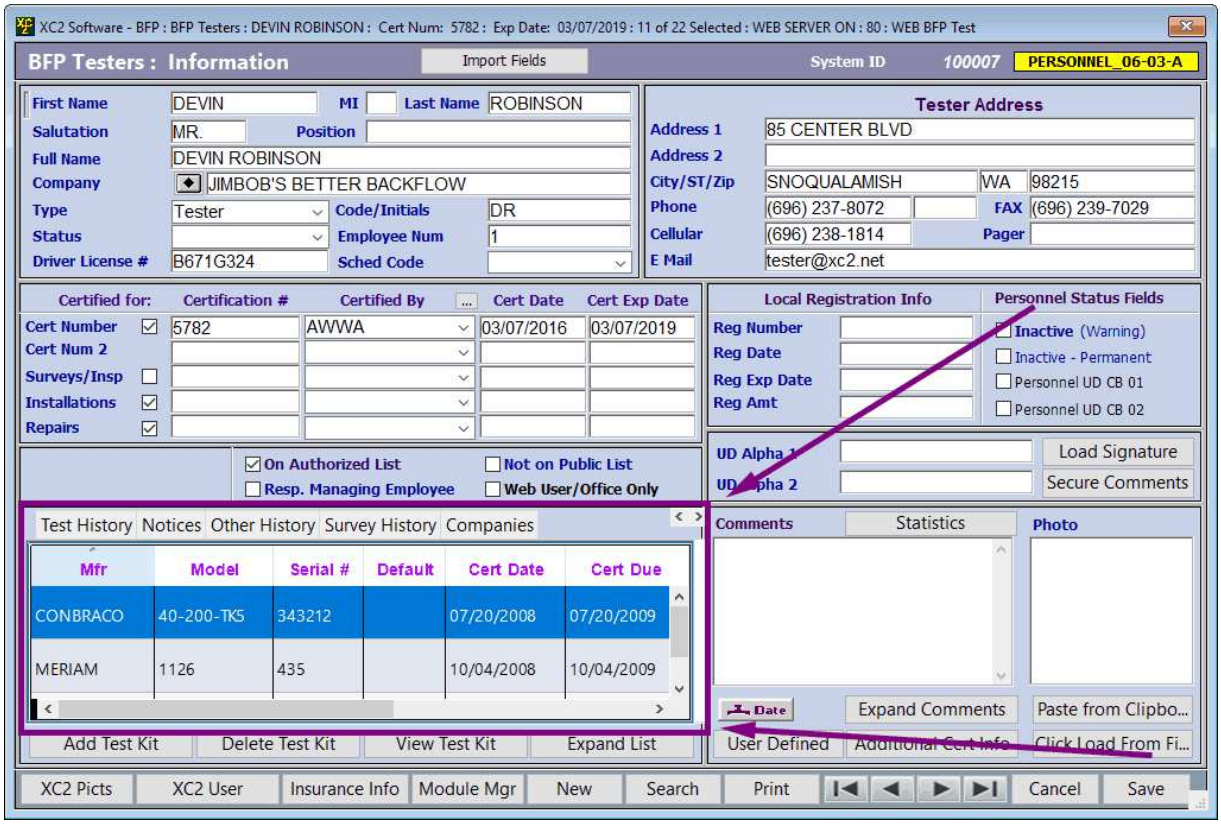
Notes:

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

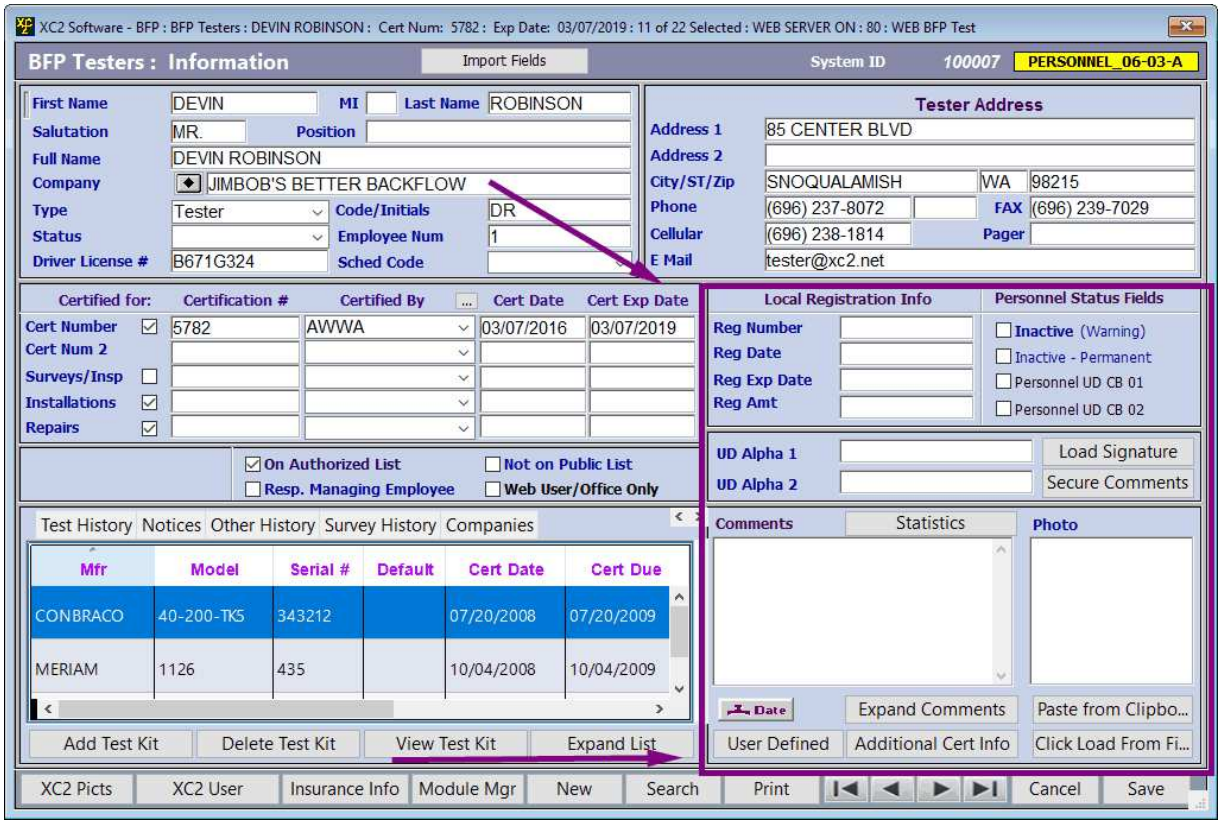


Notes:

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



Notes:

XC2 Software Knowledge Base

How to Create a New Tester Record in XC2

KB Asset ID: 2598

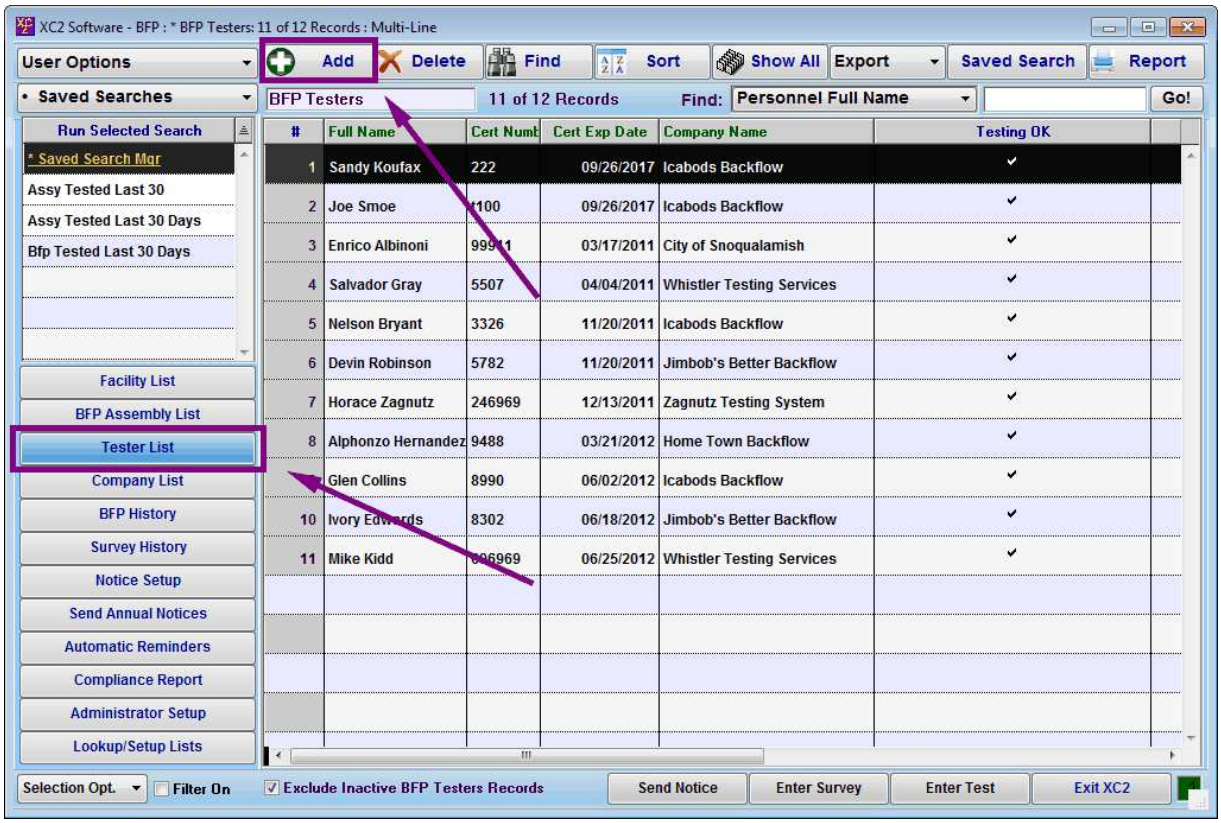
Page describes how to create a new Tester Record in XC2

Select The Tester List

To create a new tester record

Select the Tester List

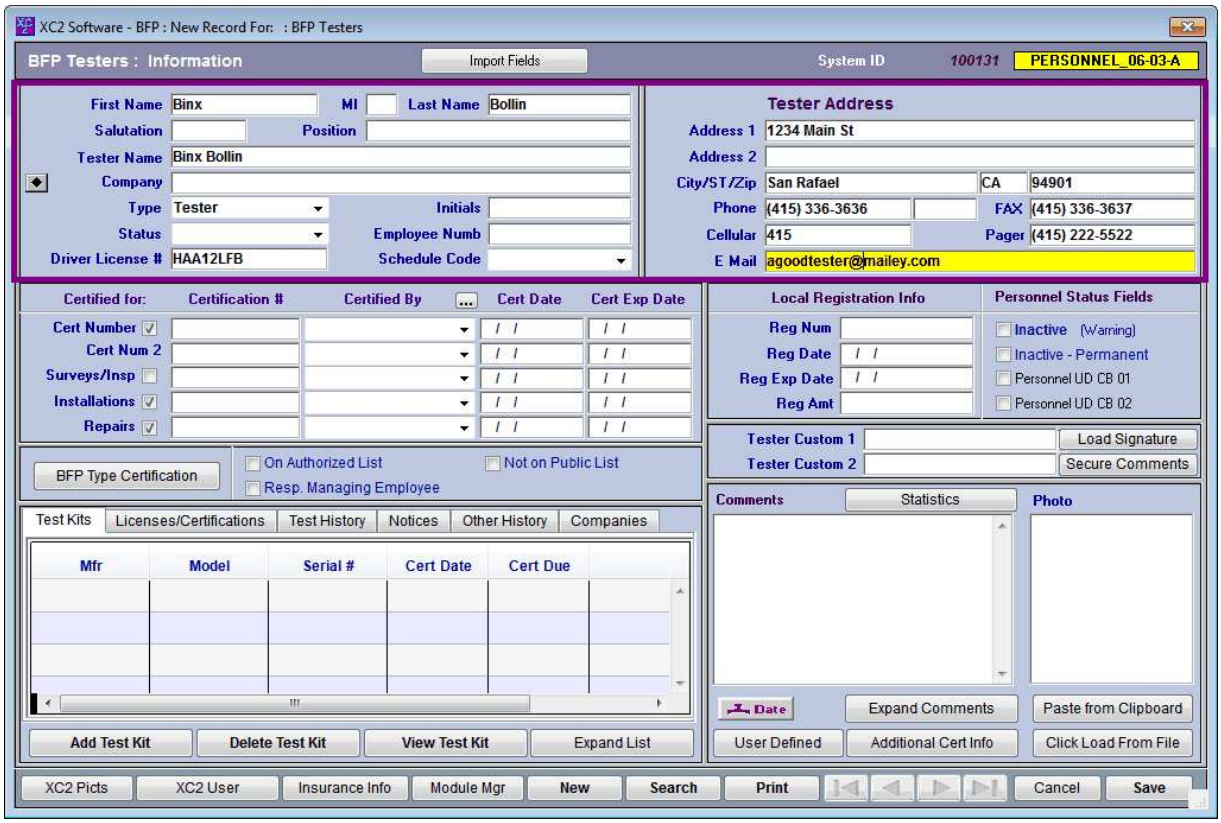
Click Add



Notes:

Enter Name

Enter the Tester's Name and any Personal Information that you would like.



Notes:

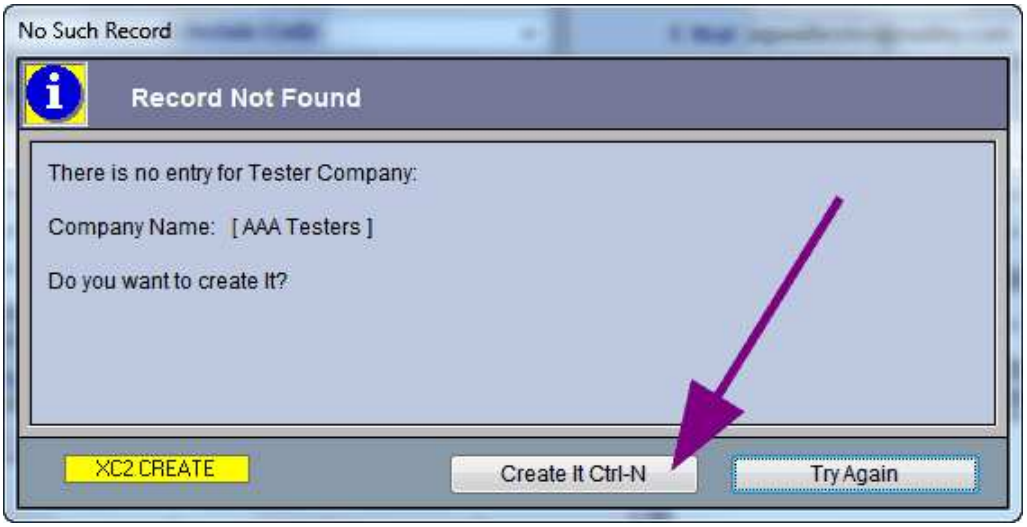
Tester Company

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



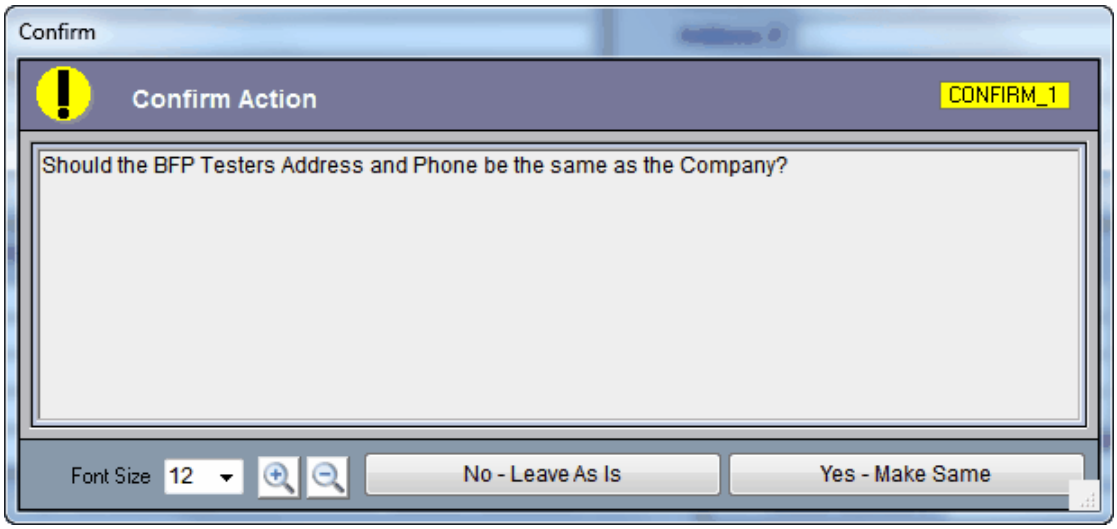
Notes:

Create the Tester Company

If this is a new tester company

Create the tester company record

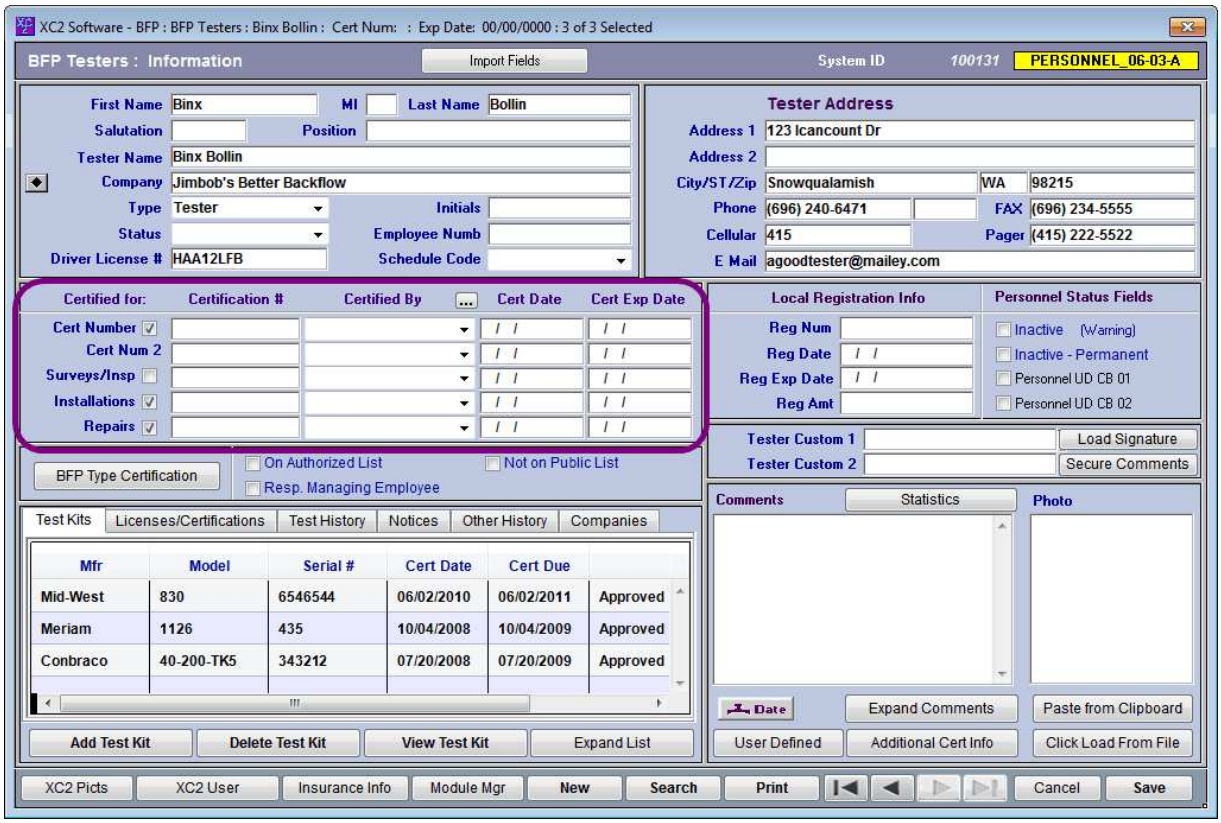
Select whether the tester company address should be the same as the tester's address



Notes:

Enter Certification Information

Enter any Certification information that you may have



Notes:

Review

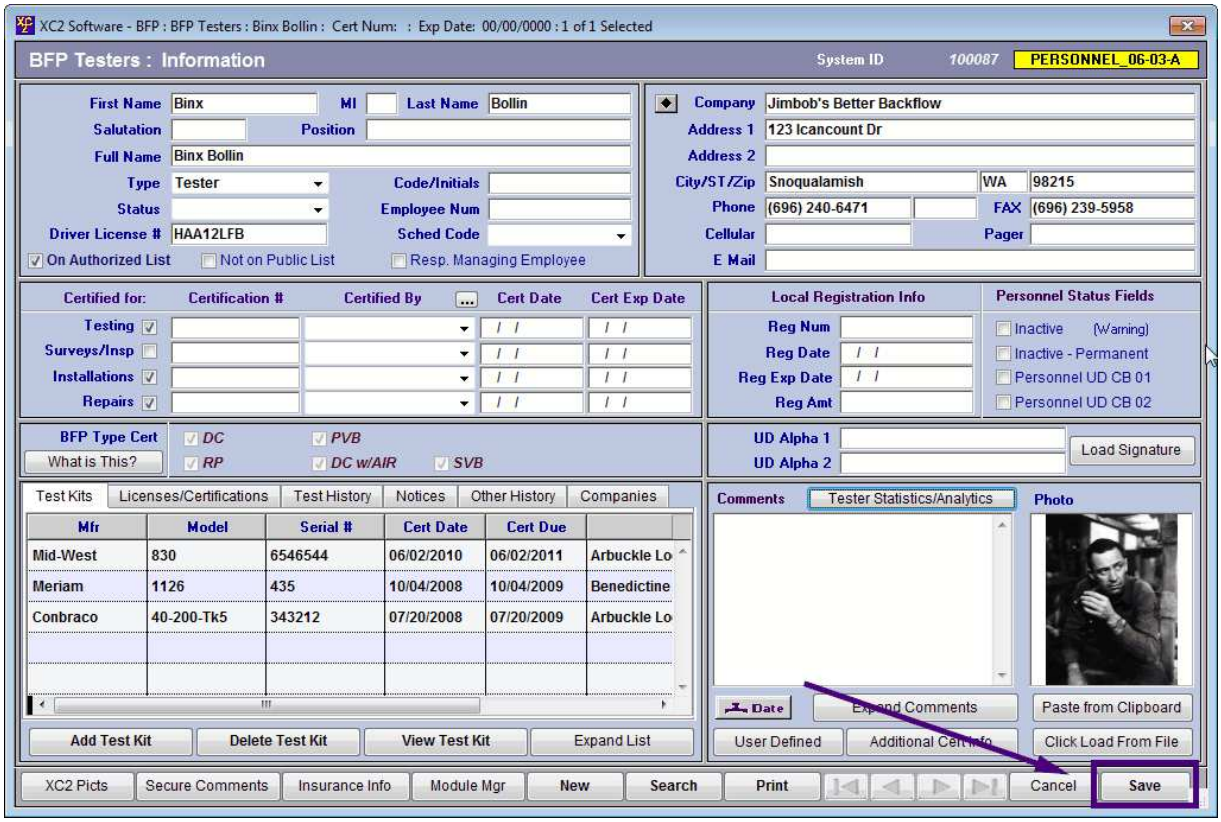
The last bit is to just review the information associated with the tester.

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.



Notes:

XC2 Software Knowledge Base

Add Tester Record from within the Company Record

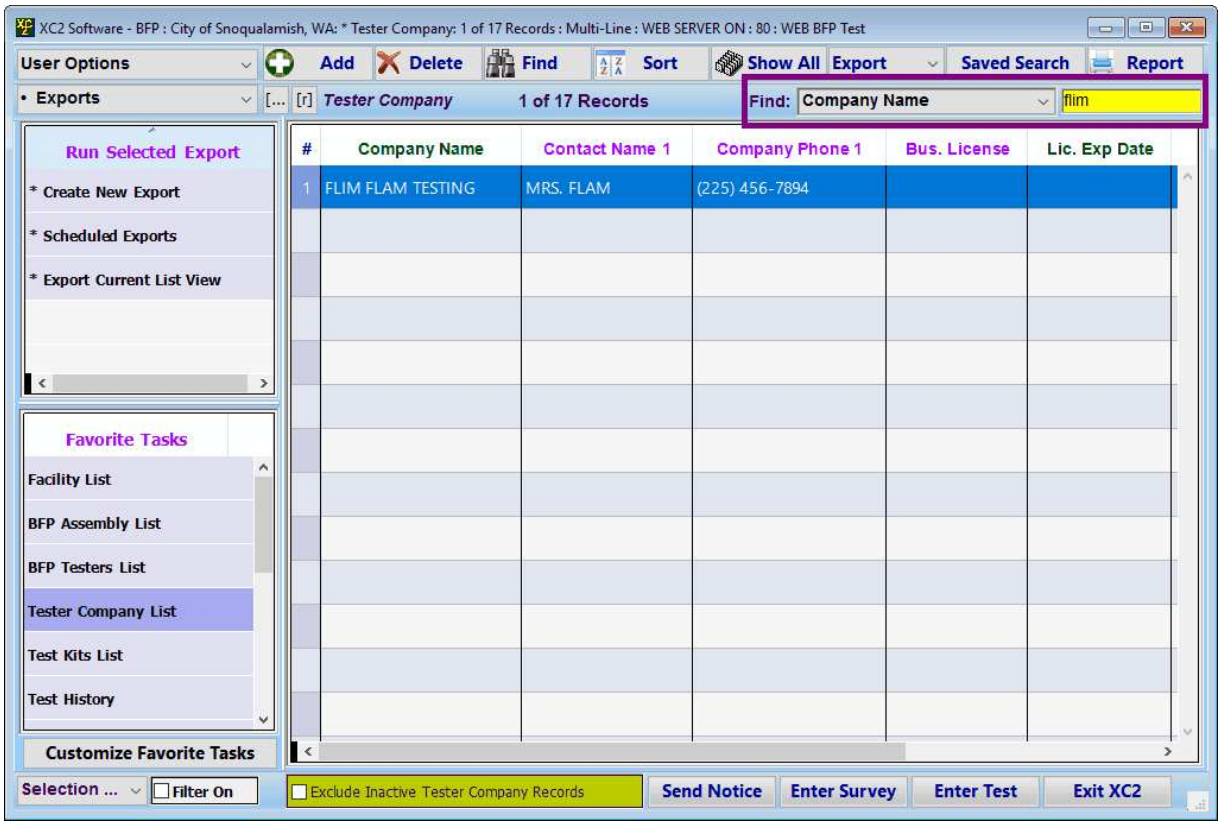
KB Asset ID: 3606

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

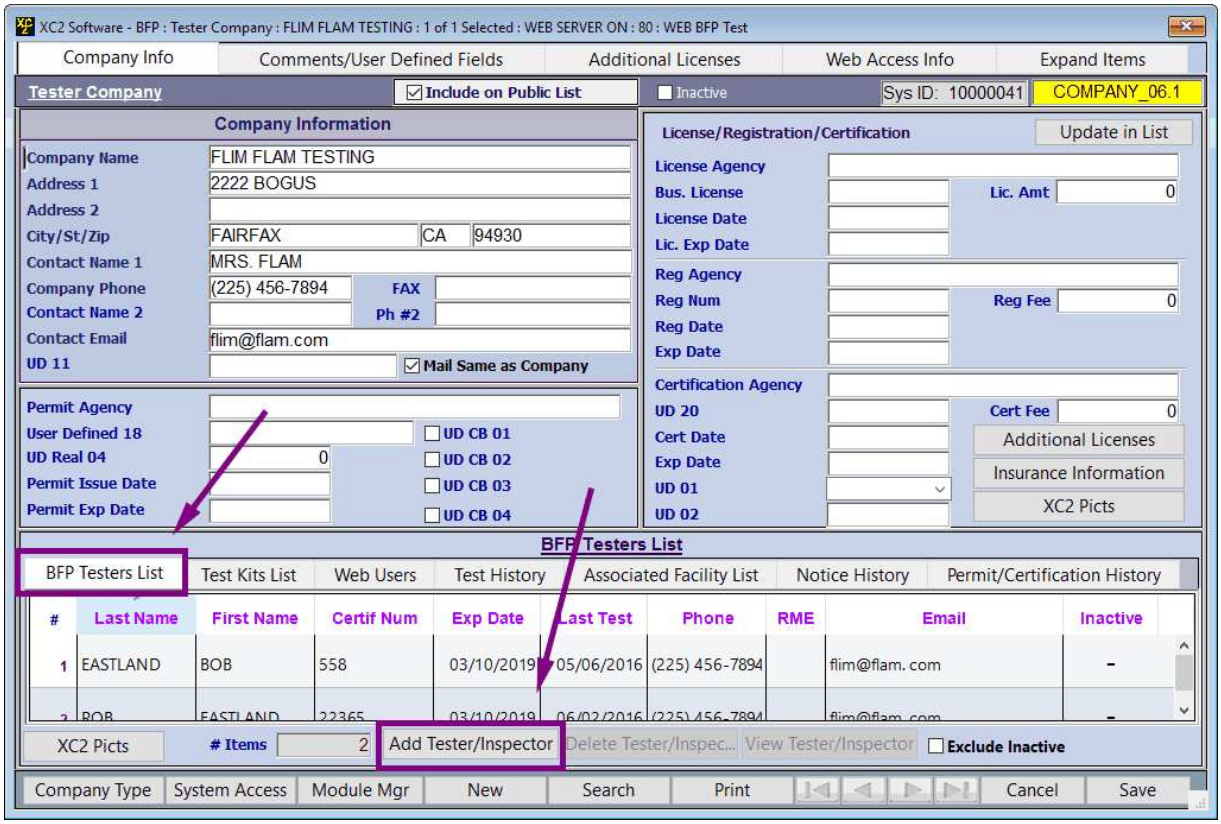


Notes:

Inside of the Company Record

From Tester List

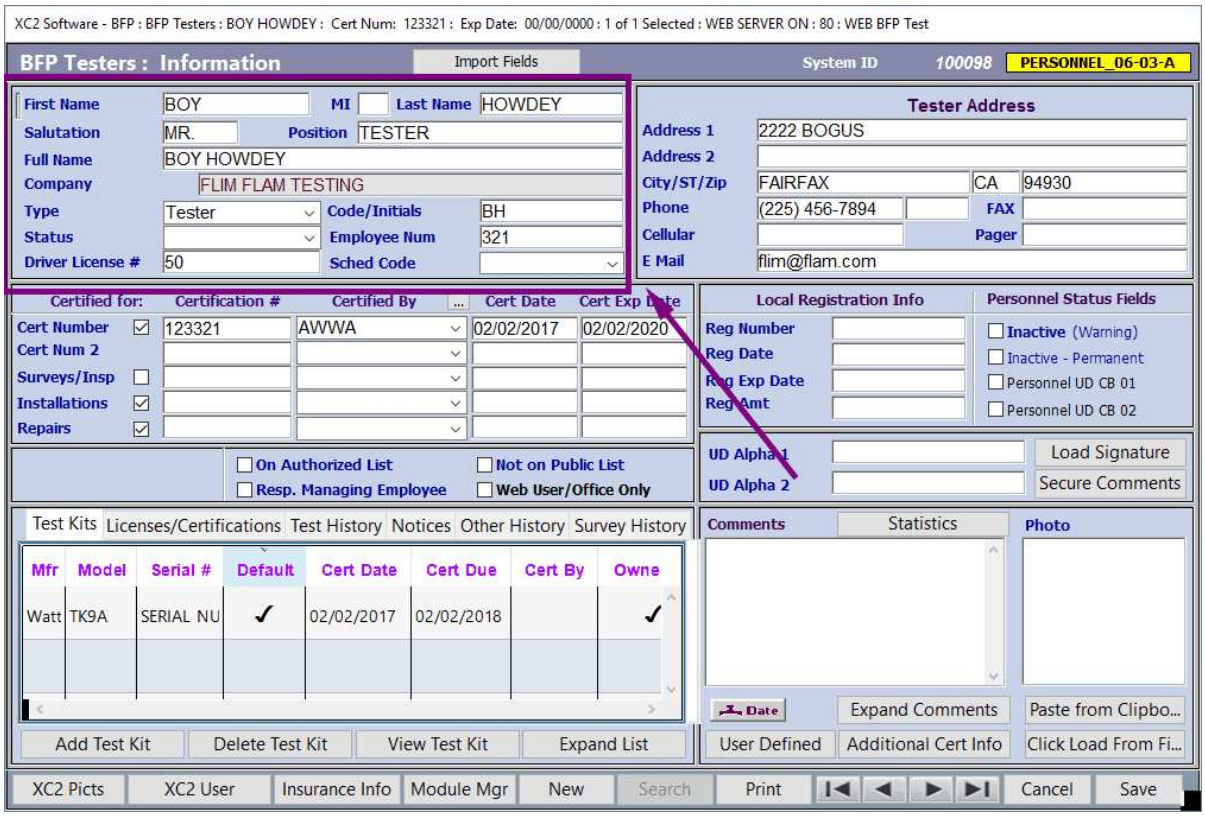
Click Add Tester/Inspector



Notes:

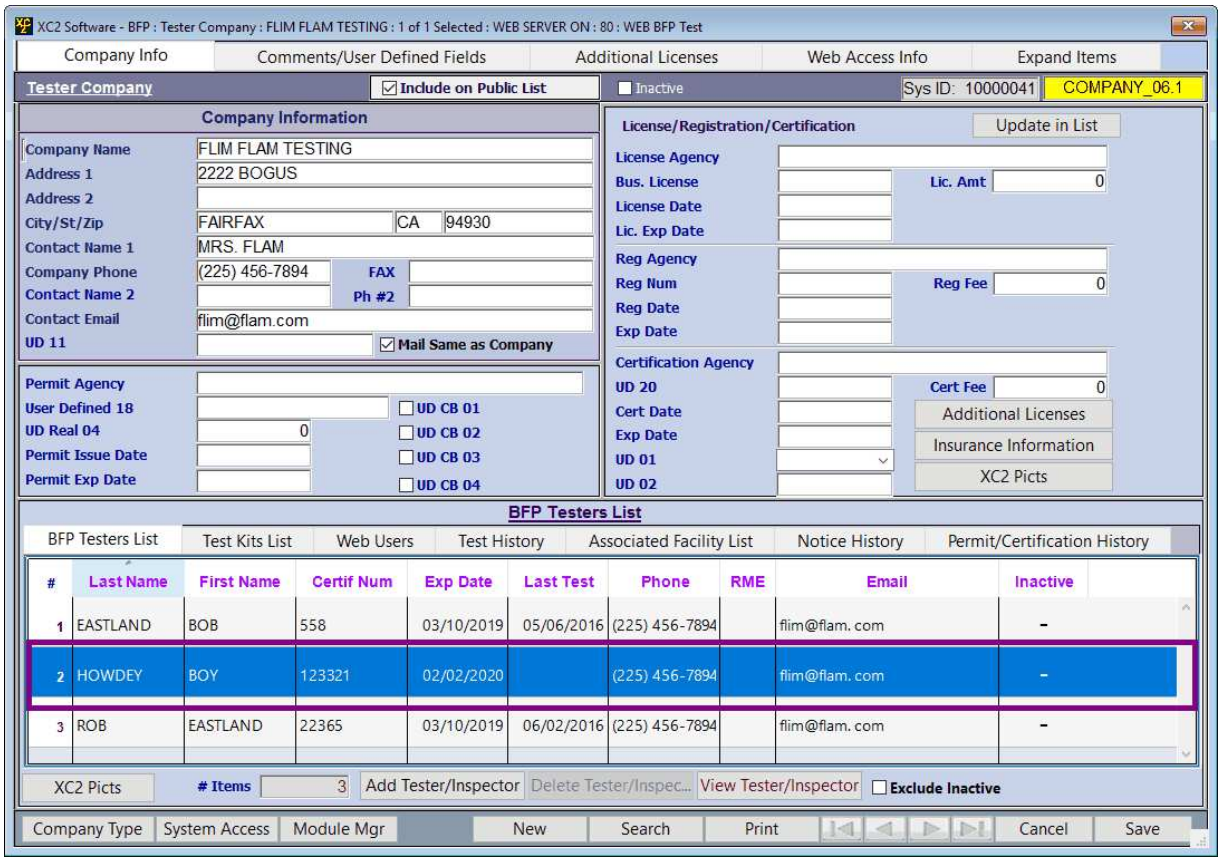
Enter Tester Information

Enter tester information and Save



Notes:

Tester Record will be added



Notes:

XC2 Software Knowledge Base

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.

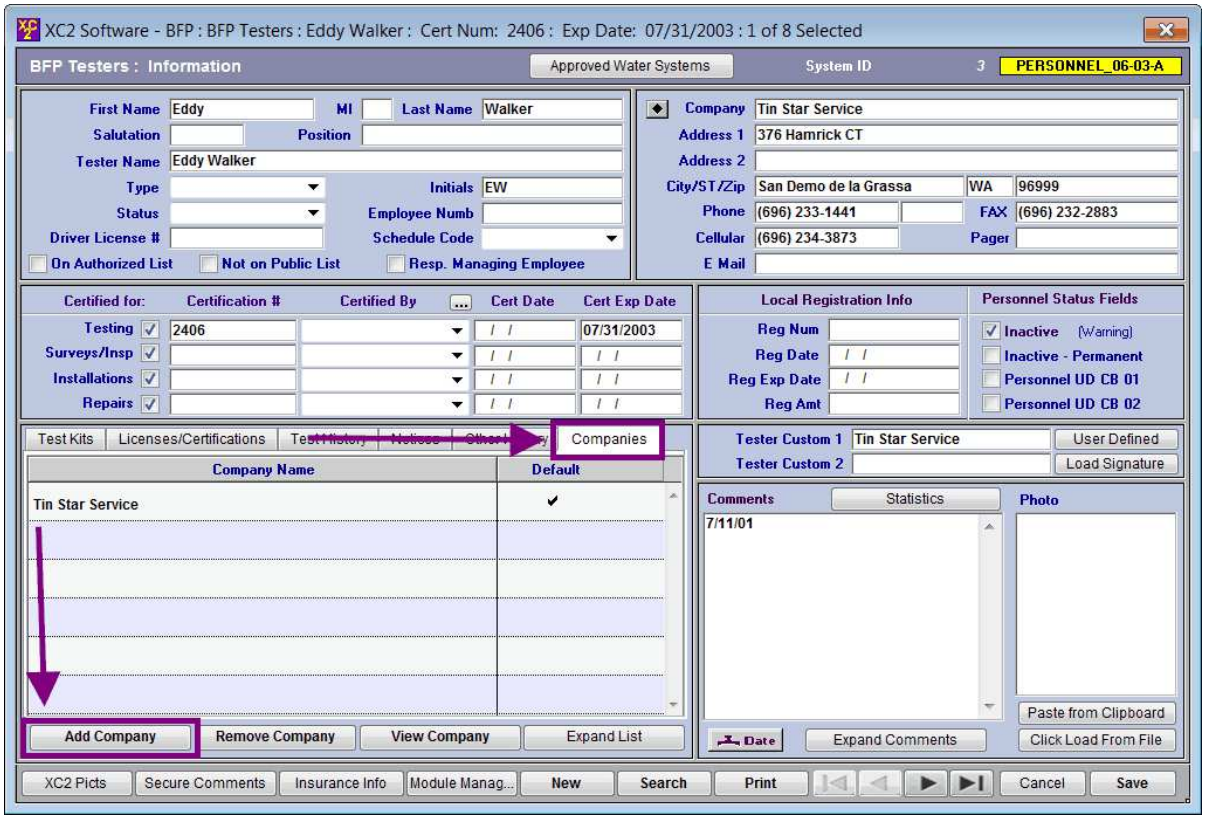
Note: This Feature became available in build 1040

Open a Tester Record

Open a Tester Record

Select the Companies Tab

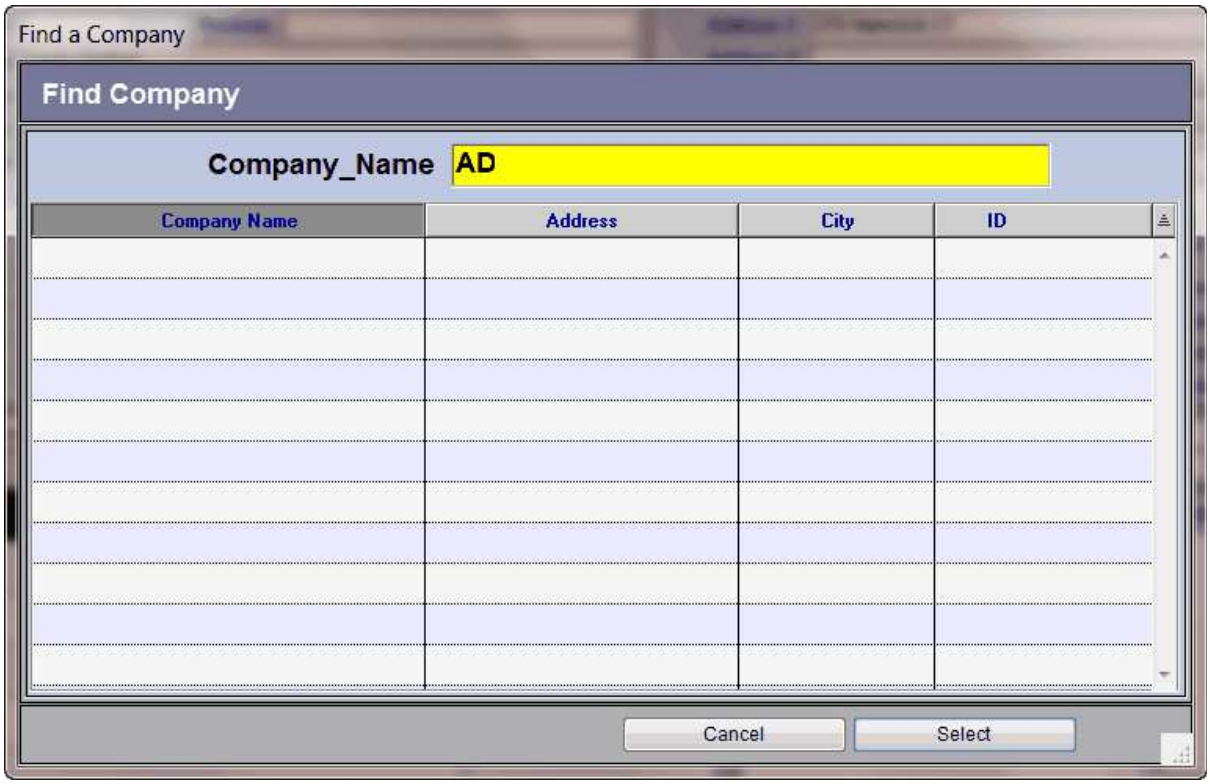
Click add Company



Notes:

Search for the Company

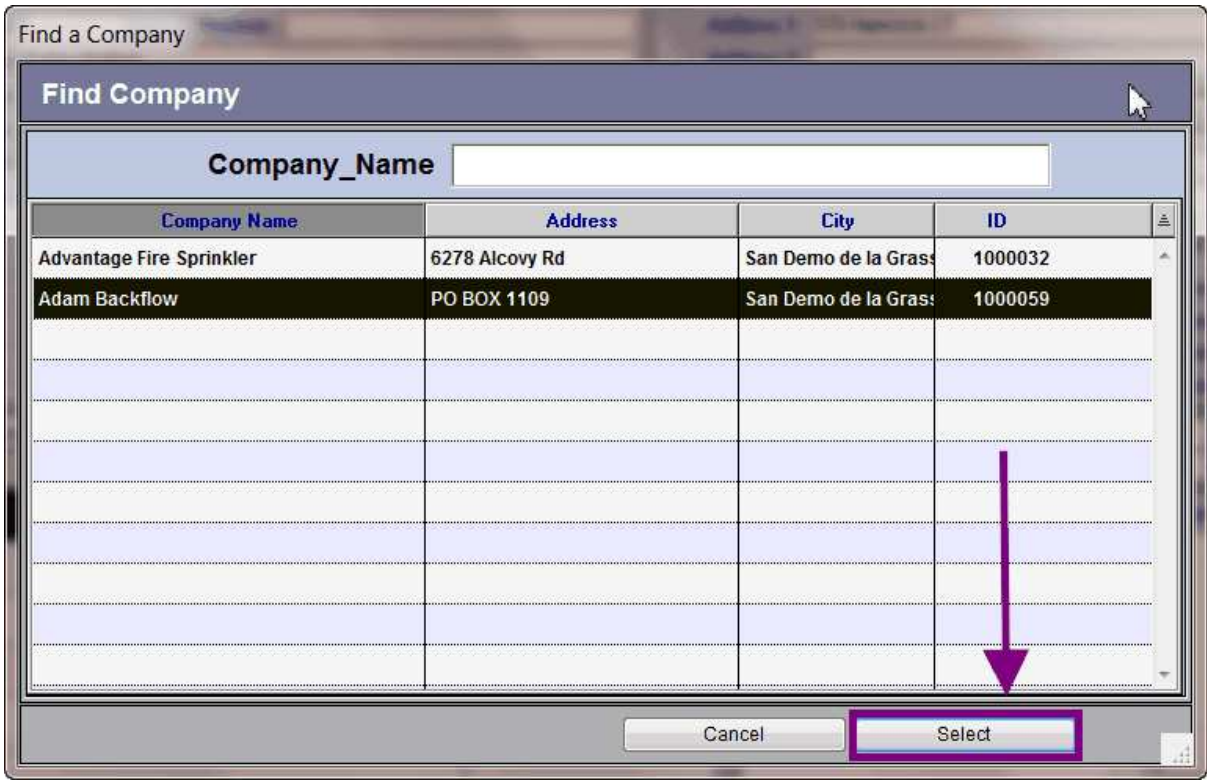
Type a portion of the company's name, then press the tab key on your keyboard



Notes:

Highlight Company

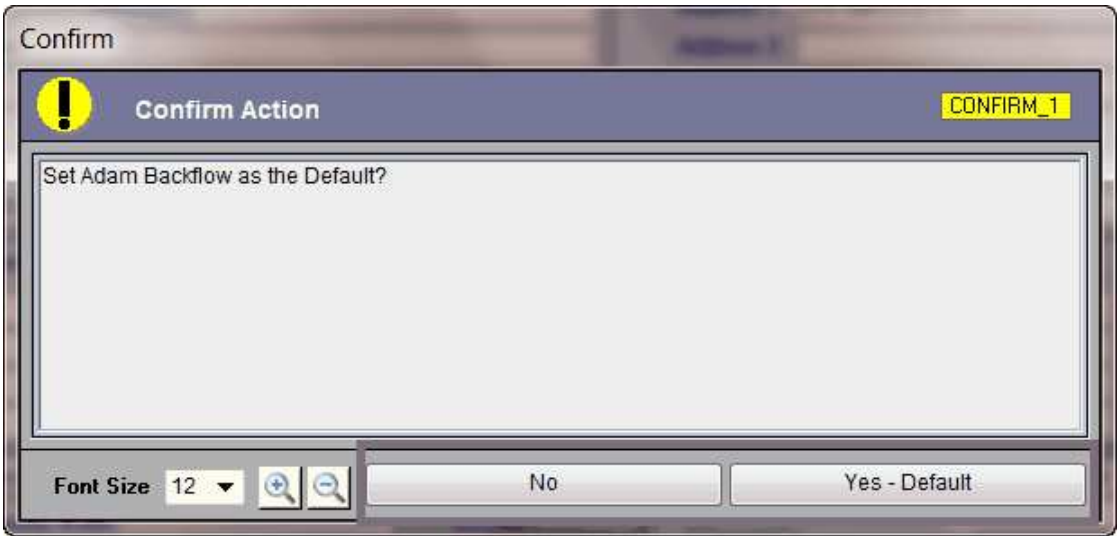
Highlight the company name, then press Select



Notes:

Confirm

Select "Yes - Default" or "No"



Notes:

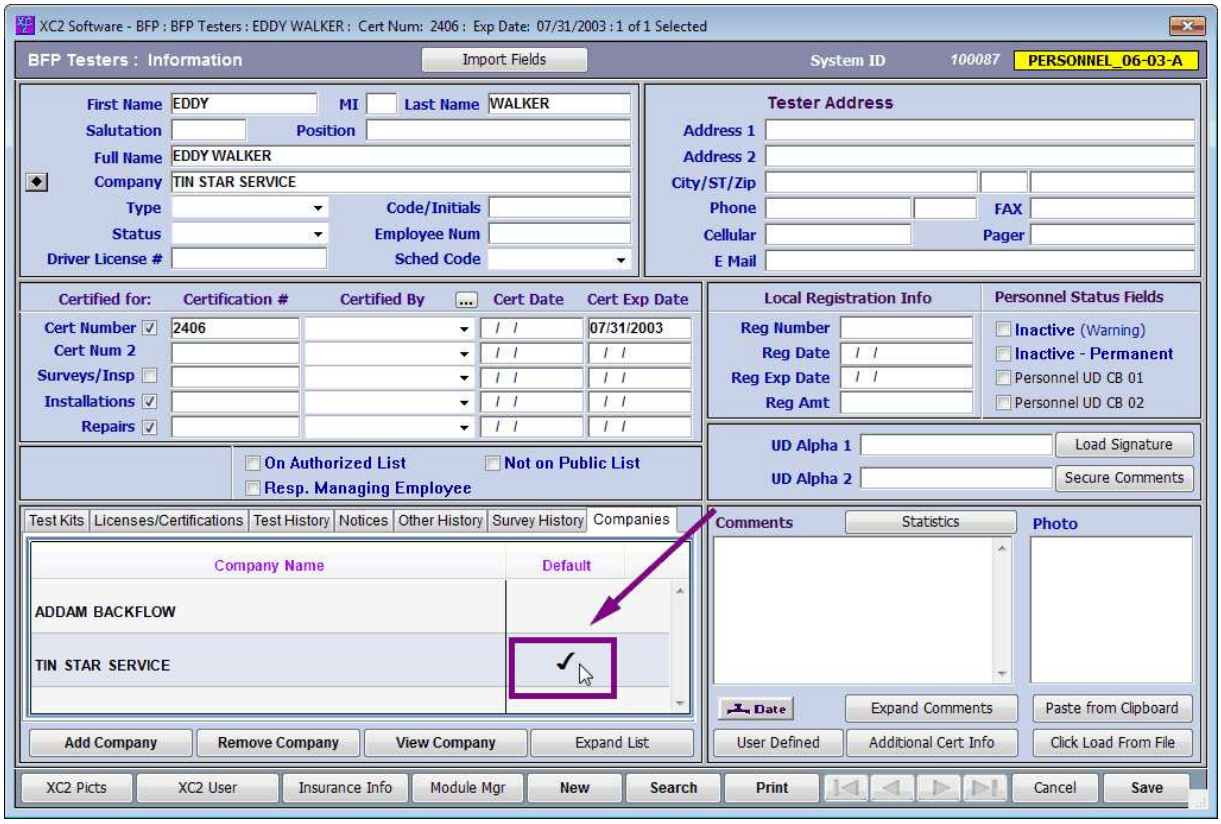
Setting the Default Company

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.

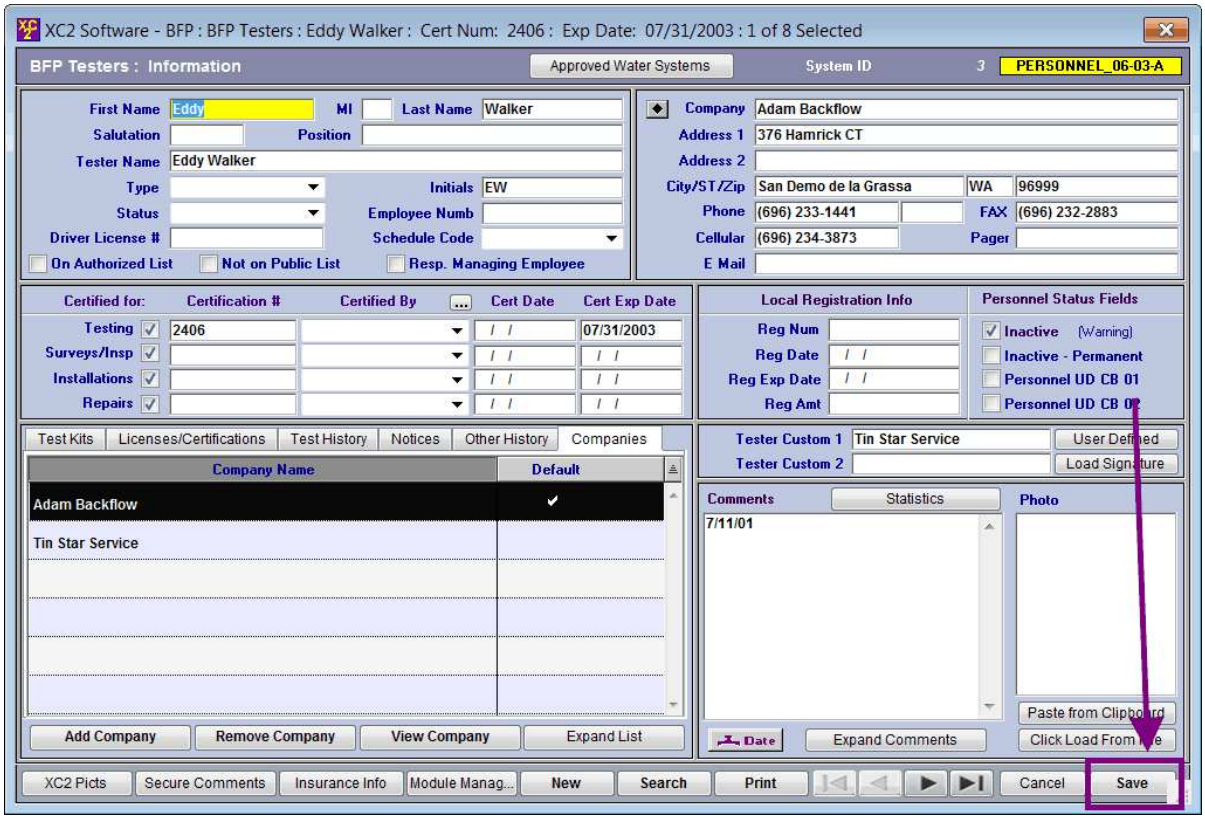
The company with the checkmark is the default company.



Notes:

The Company will be added to the record.

When you are finished, click the Save button.



Notes:

XC2 Software Knowledge Base

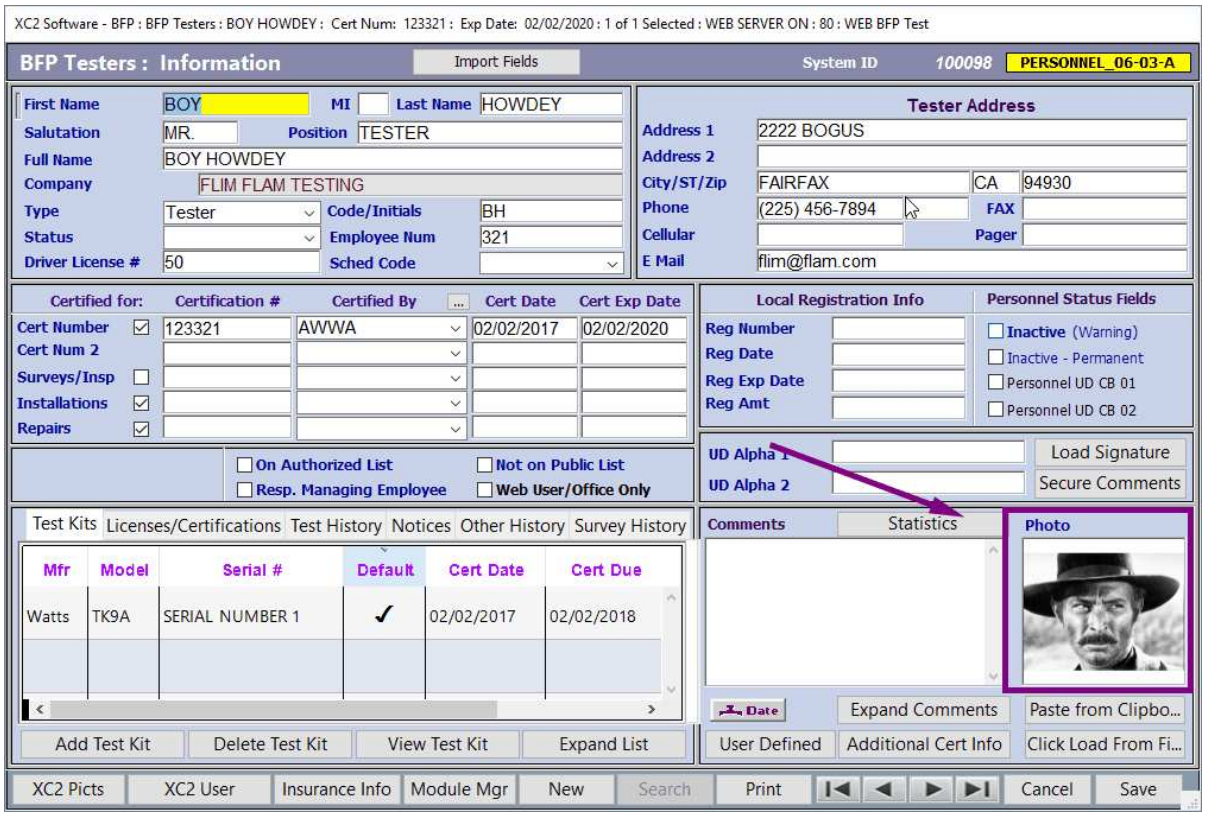
Adding Tester Pictures in XC2

KB Asset ID: 3607

This page describes how to upload pictures of testers in XC2.

Picture Of Tester

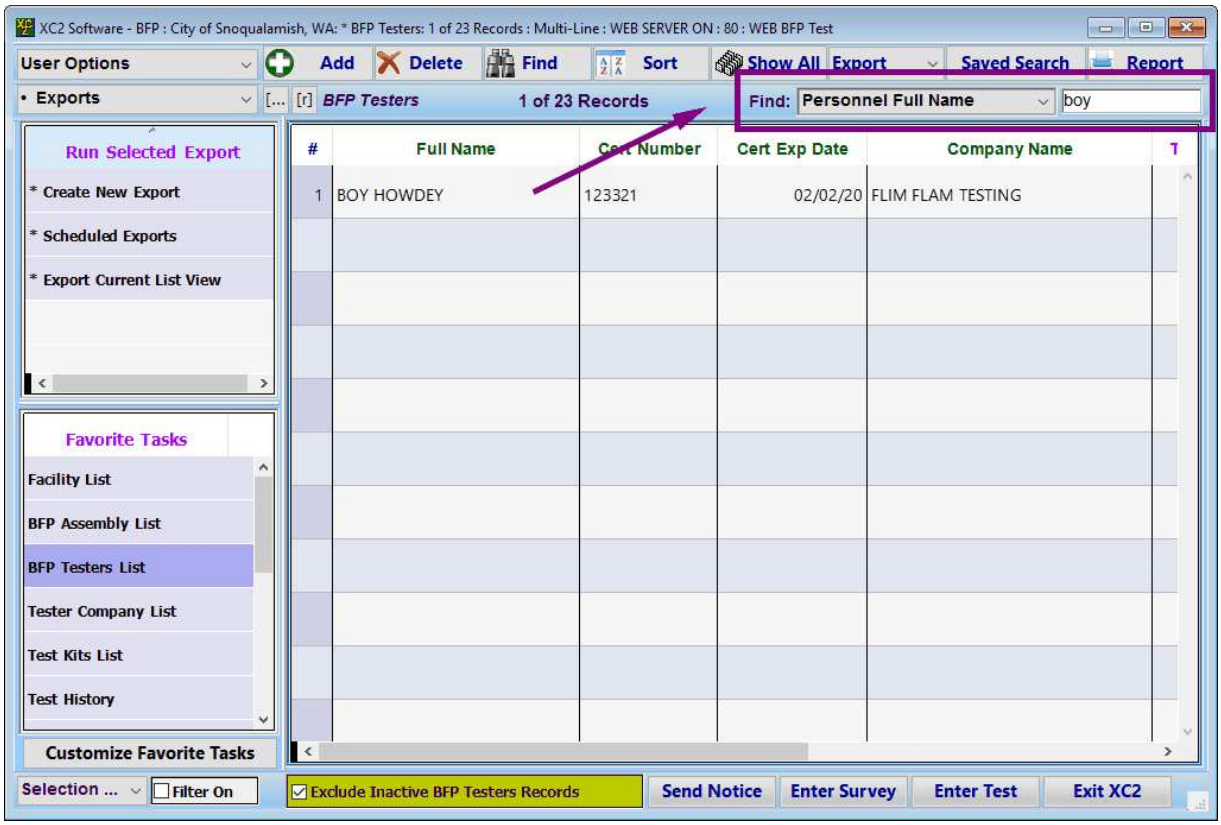
A Testers Picture can be uploaded directly into XC2. This picture can be viewed from the main tester record Page



Notes:

Search for tester record

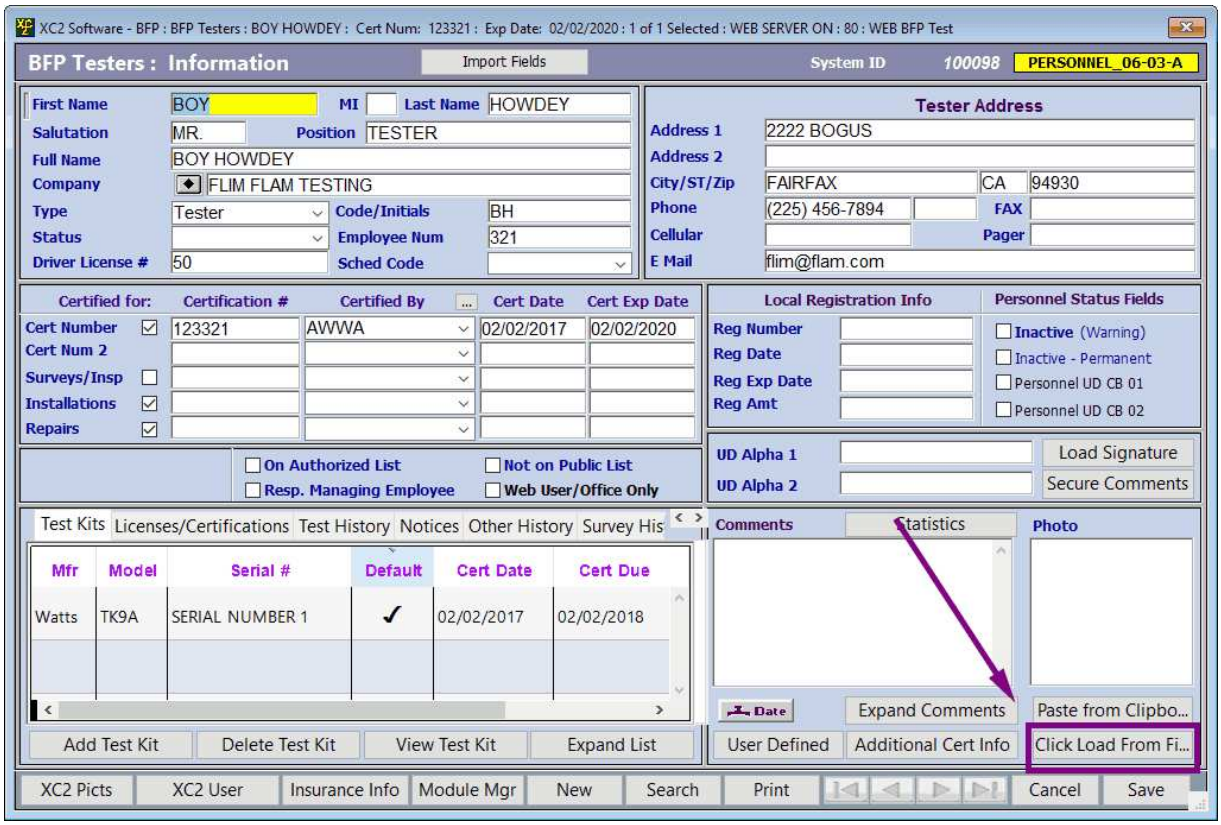
Double click to open the record



Notes:

Inside Tester Record

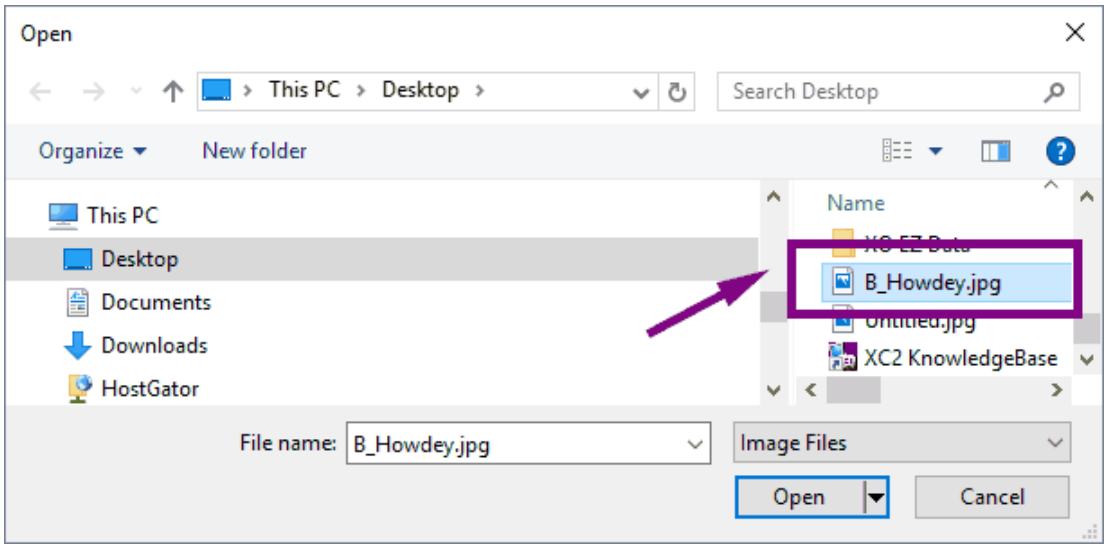
Click Load From F..



Notes:

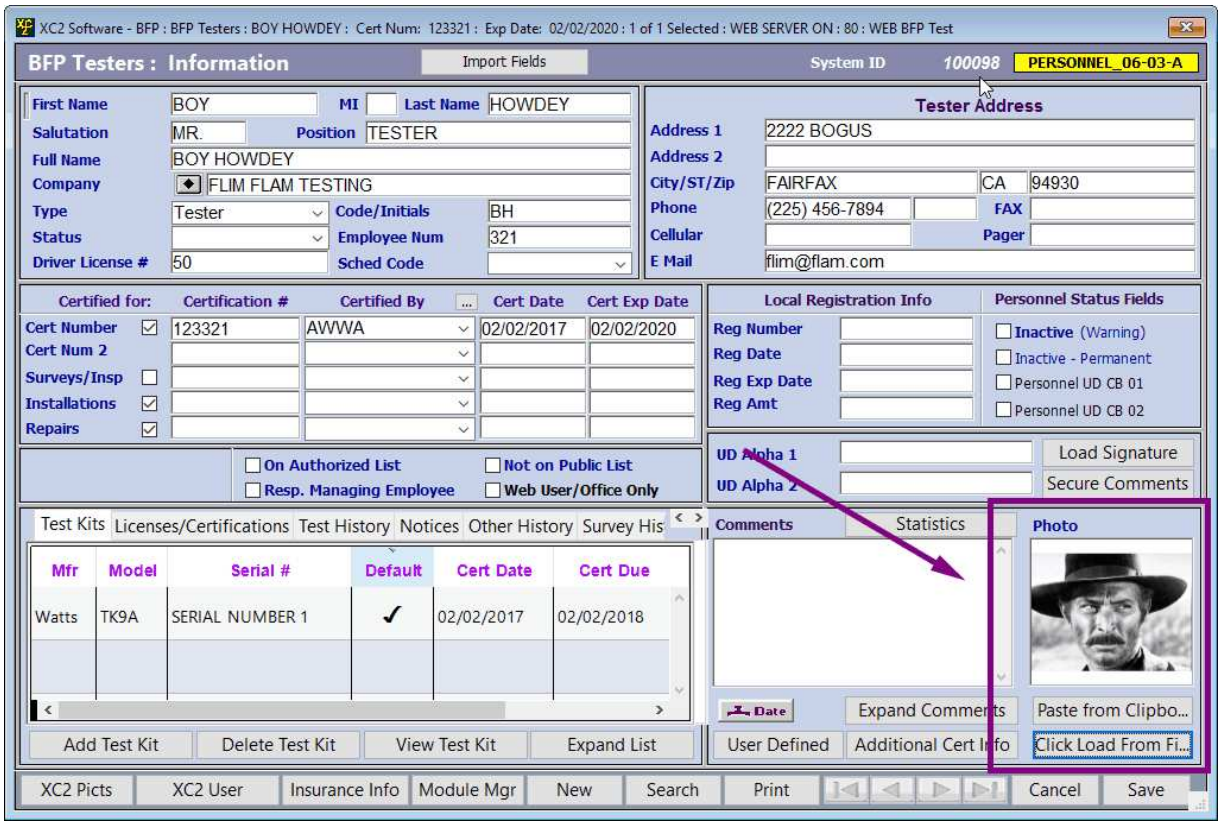
Navigate to Picture

Select the Picture that you would like to upload



Notes:

Picture will be uploaded



Notes:

How to make a Tester Record Inactive

KB Asset ID: 3644

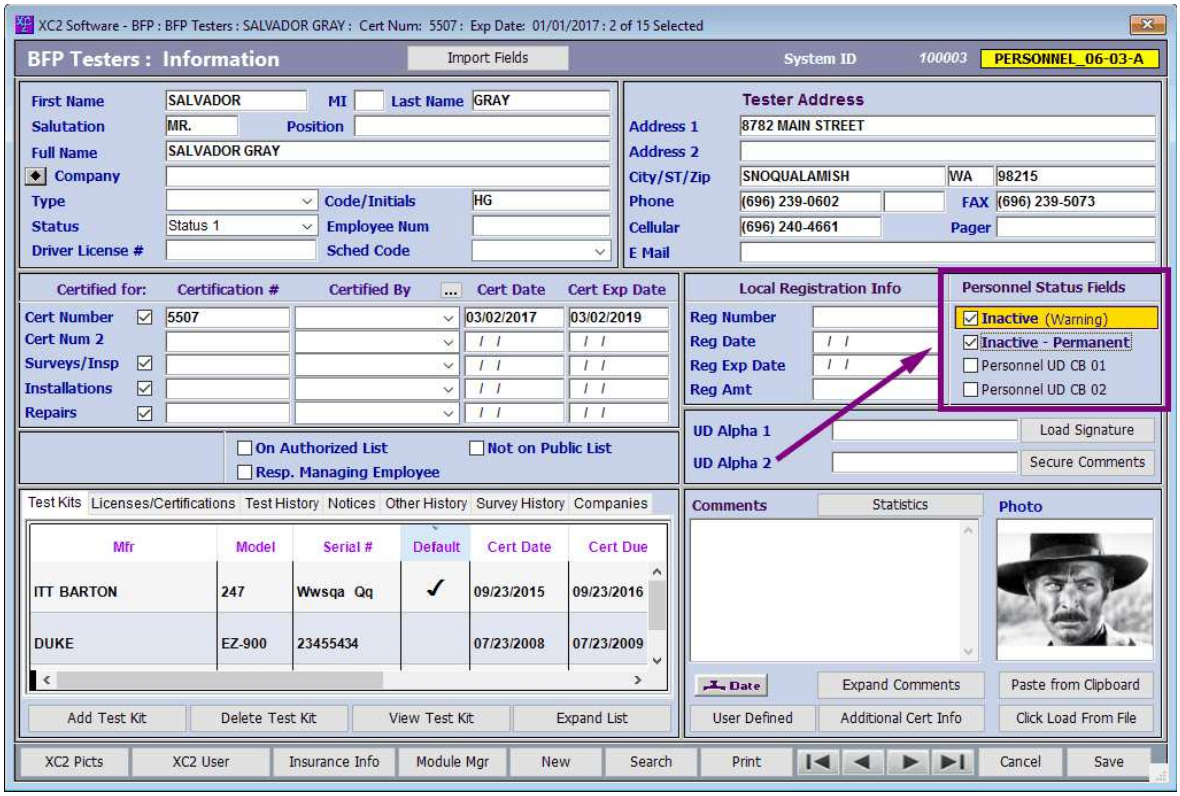
The page below describes how to make a Tester Record inactive.

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

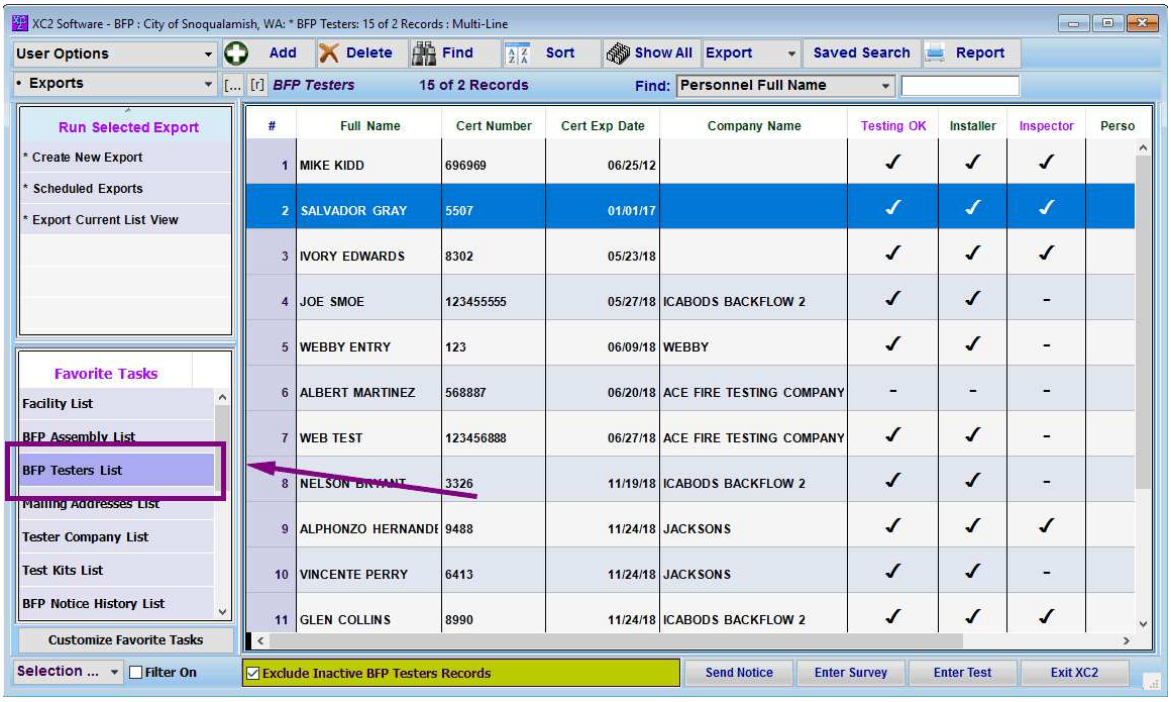


Notes:

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

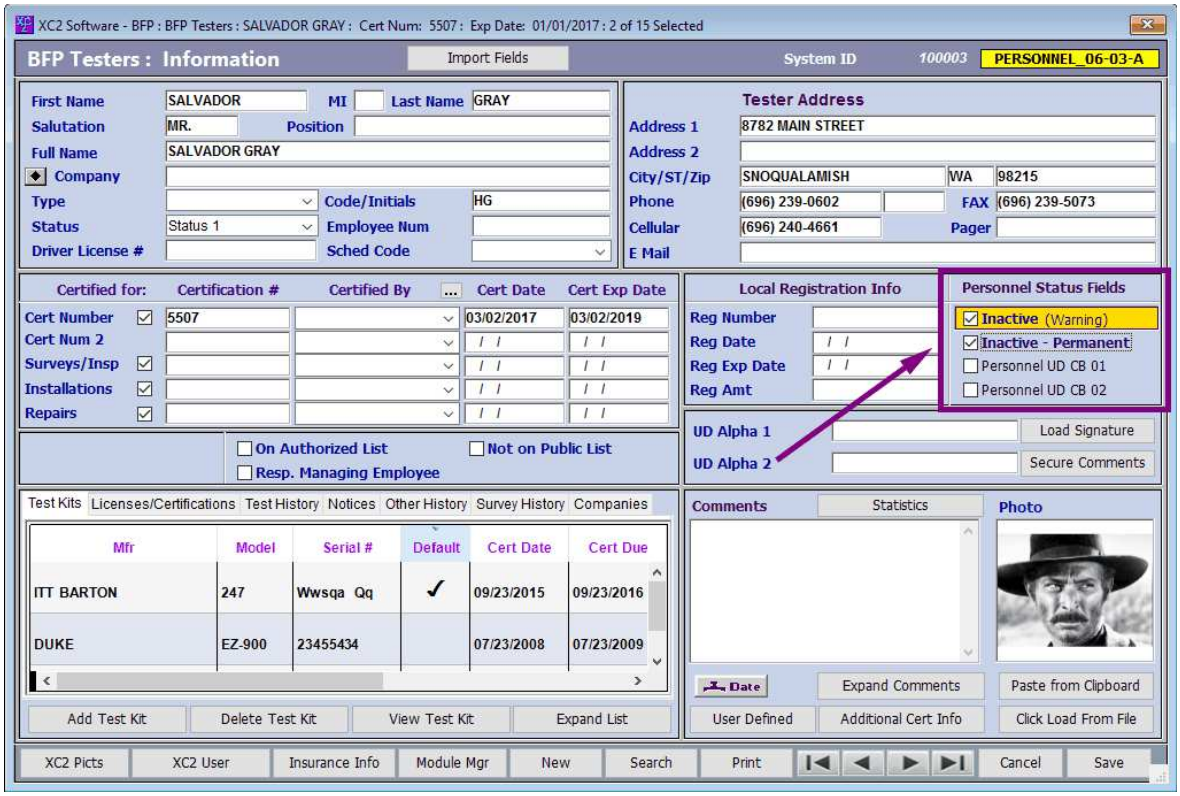


Notes:

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



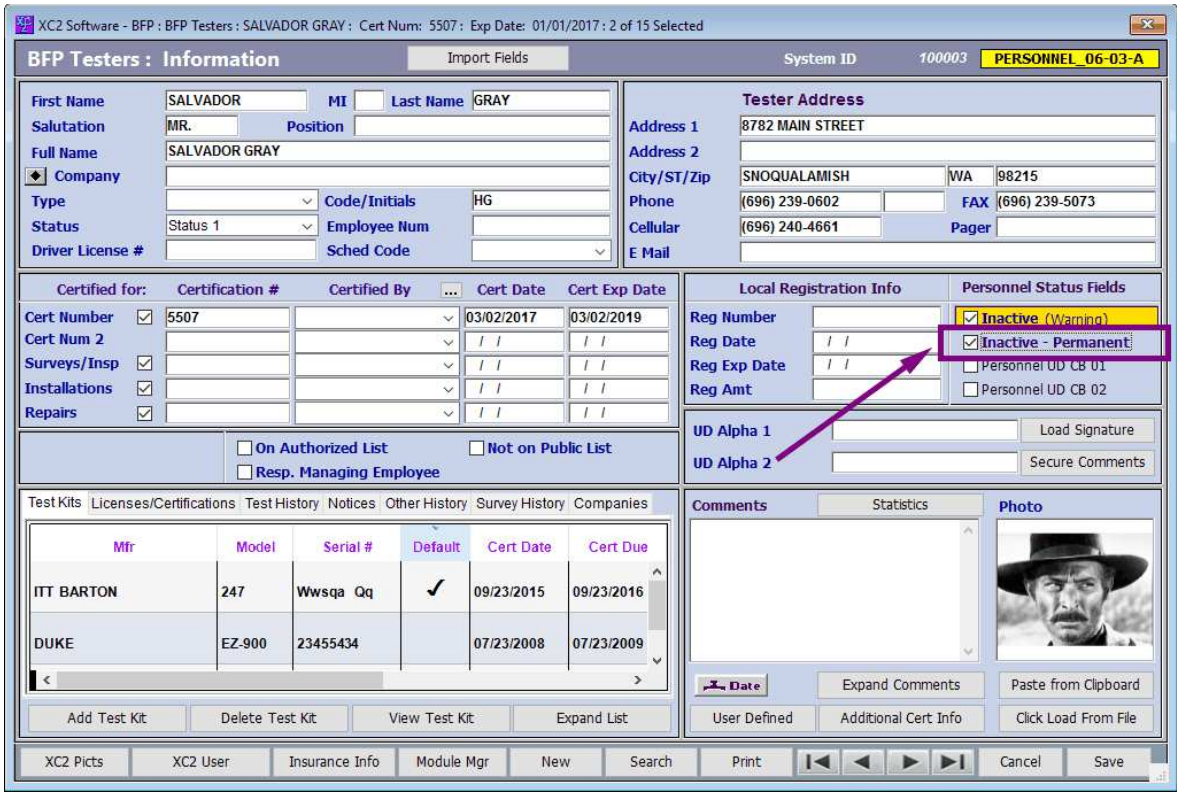
Notes:

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.

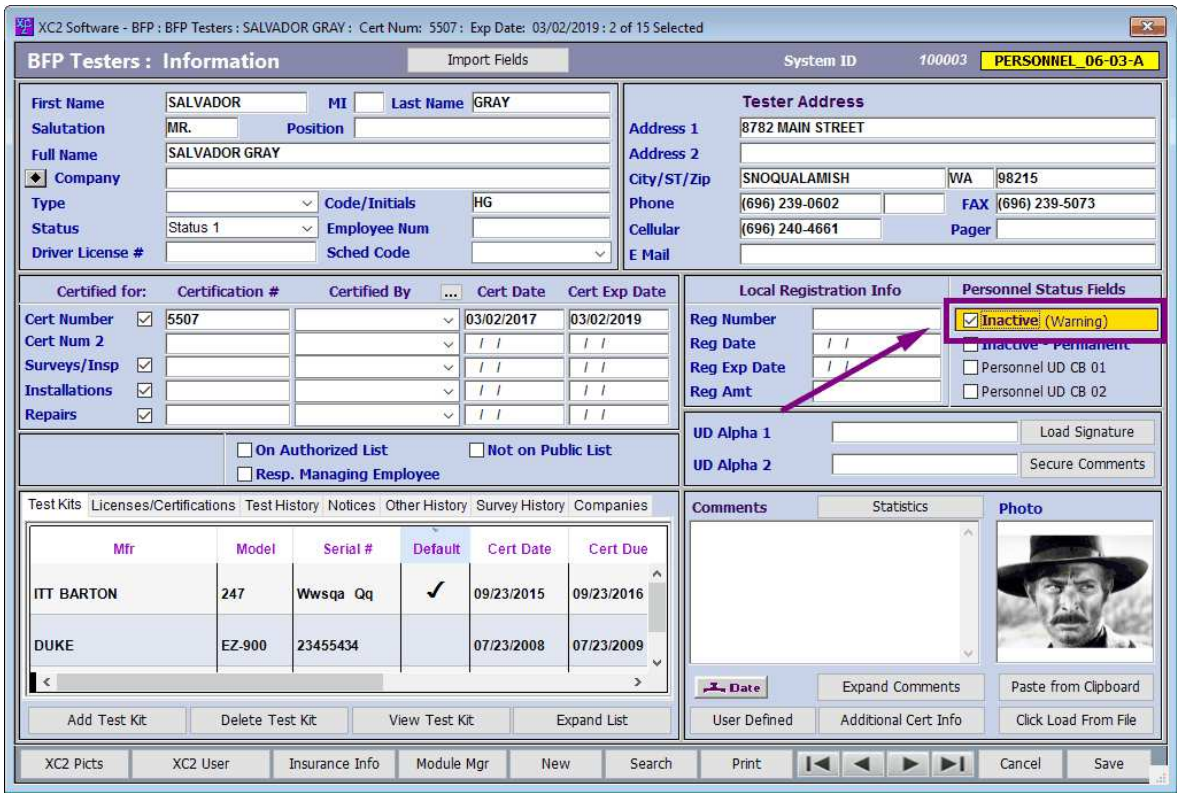


Notes:

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.



Notes:

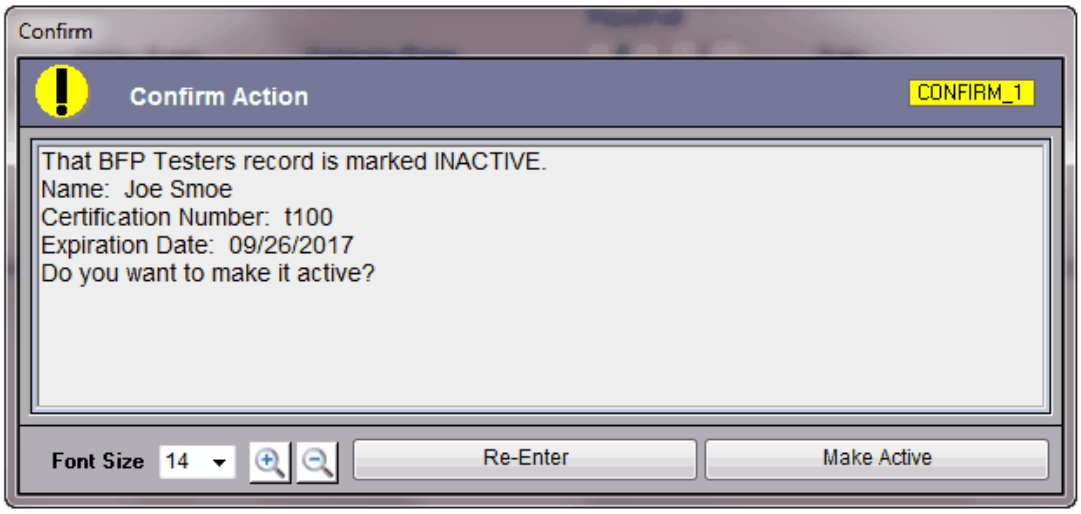
How Does it Work?

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

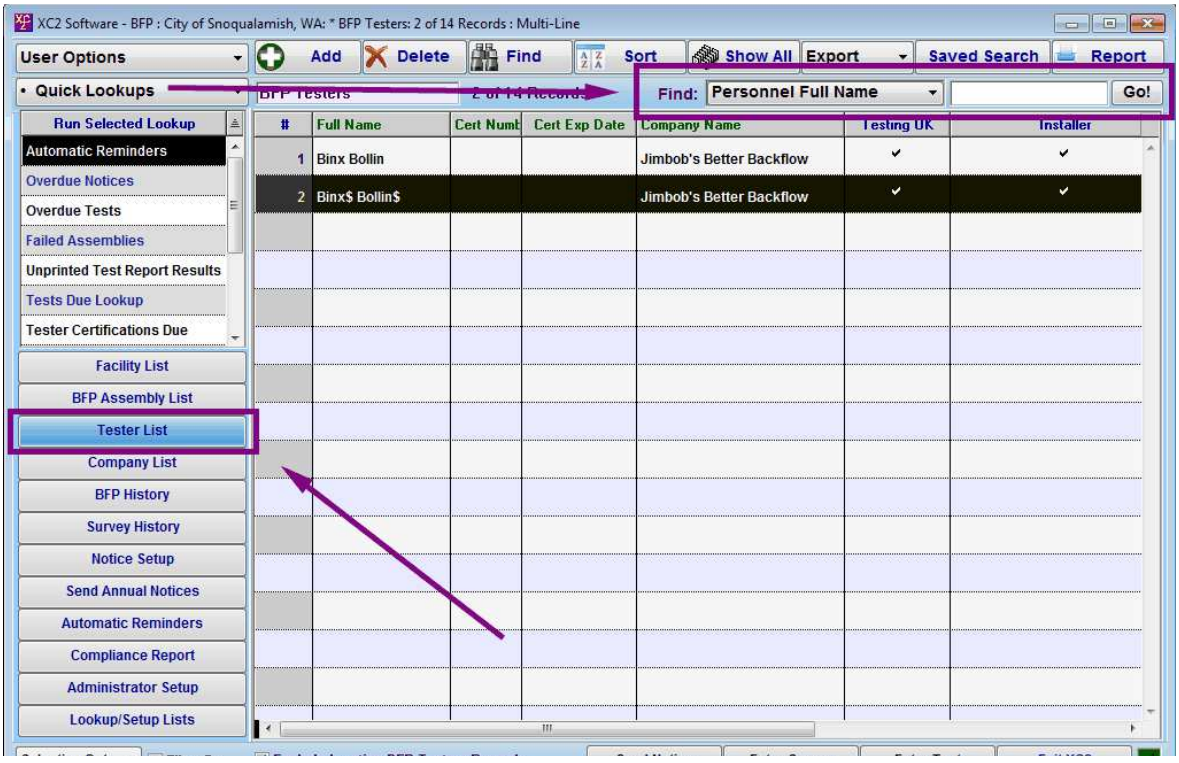
- Initial Test History
- Final Test History
- Repair History
- Survey History
- Followup Survey History

Select the Tester List

To move the tester's history, select the Tester List

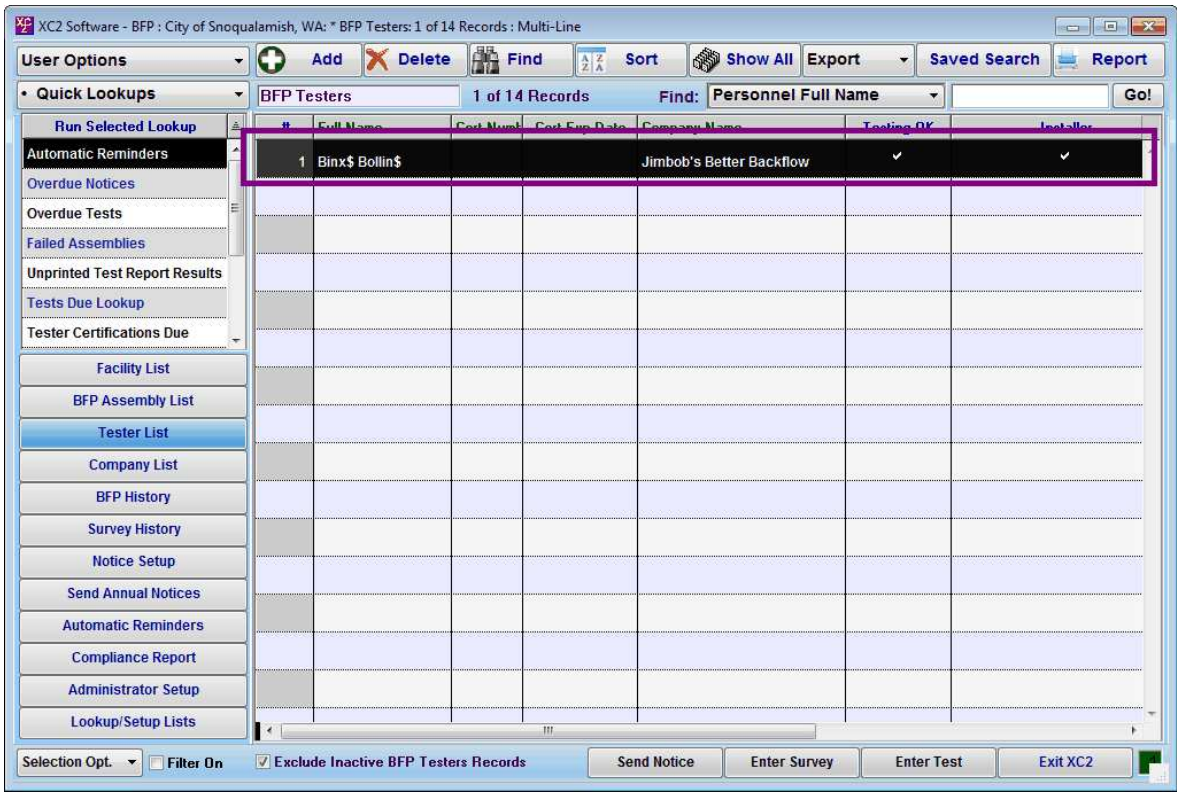
On the Tester List search for the Tester for whom you would like to move the history.

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.



Important Note

Before moving Tester History, make sure the list has only the record you would like to move history out of.



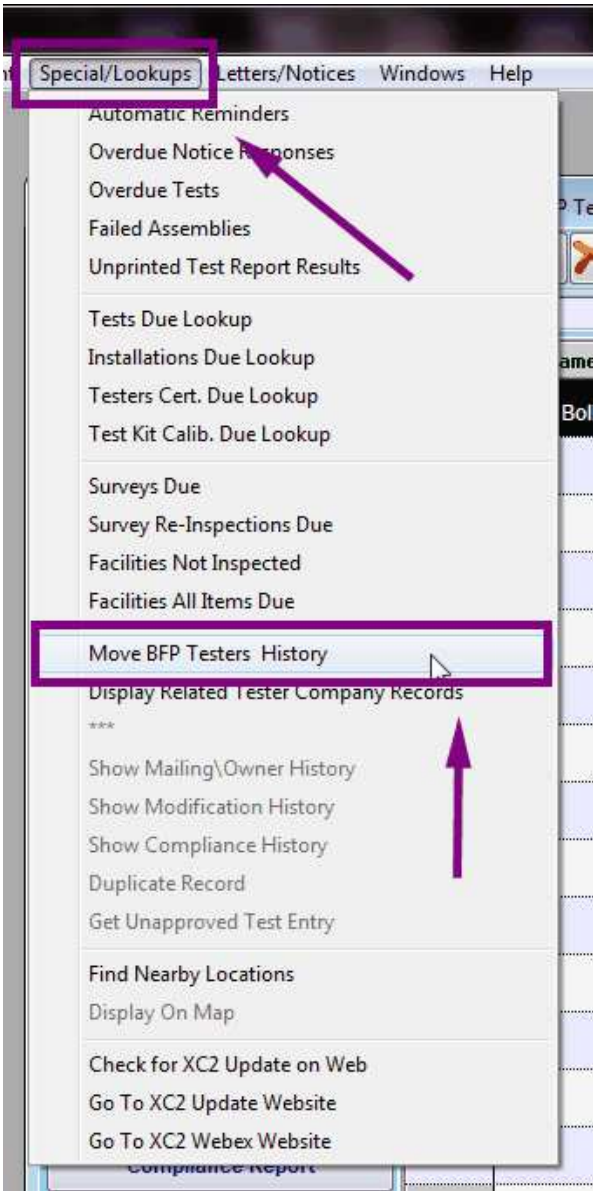
Notes:

Move History

Once you have your list, select

Special/Lookups

Move BFP Testers History



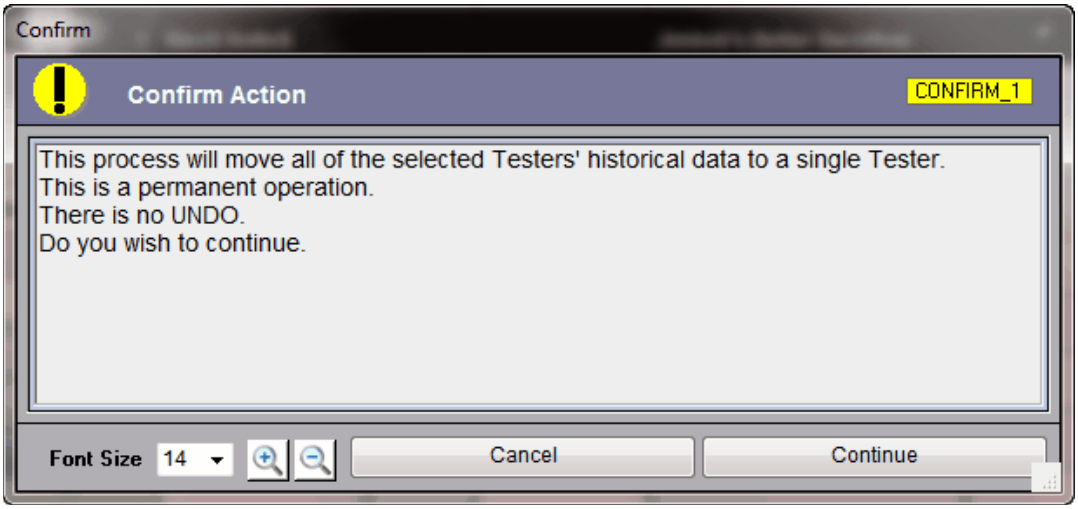
Notes:

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



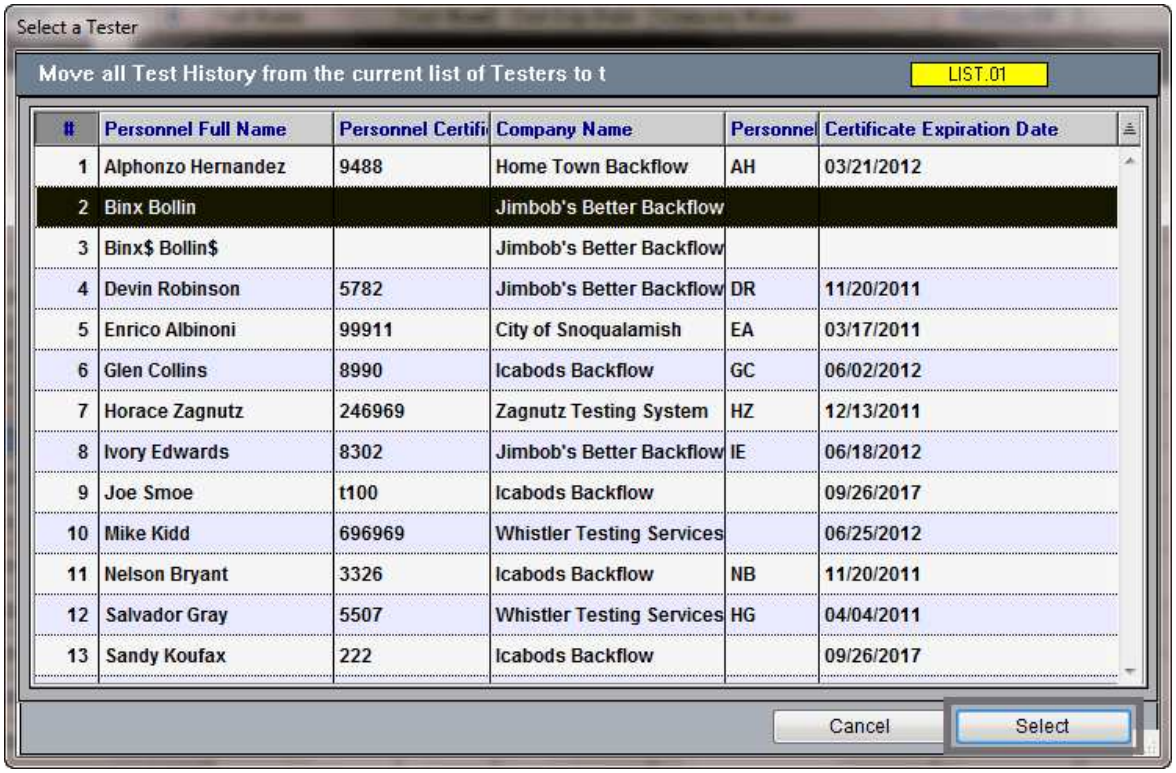
Notes:

Select the tester

Choose the Tester you would like to move the Test history to.

Click Select

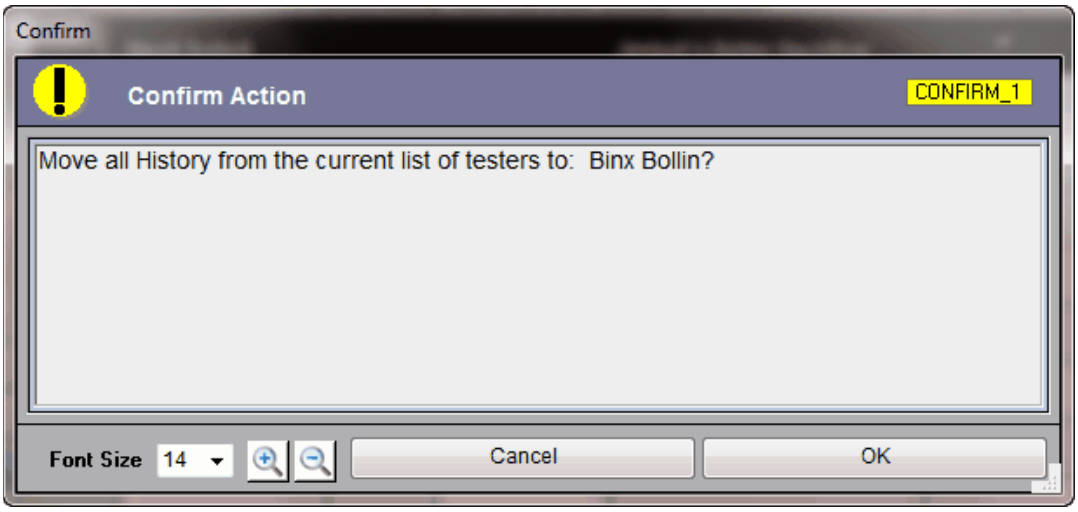
Note: This is why it may be helpful to slightly change the name of the Duplicate Tester record



#	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		Jimbob's Better Backflow		
3	Binx$ Bollin$		Jimbob's Better Backflow		
4	Devin Robinson	5782	Jimbob'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	Jimbob'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:

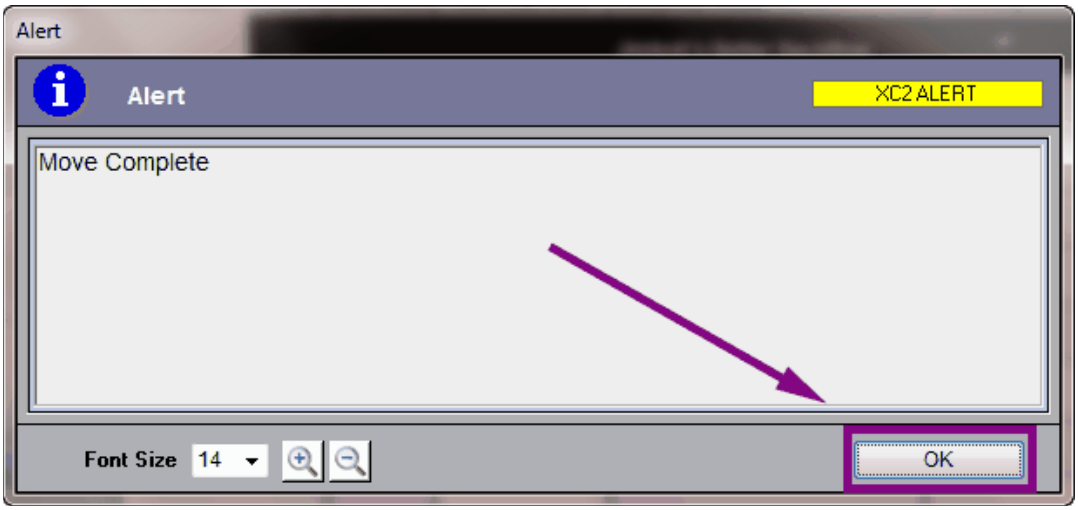
Confirm that this is what you would like to do



Notes:

Confirmation

Click OK to complete

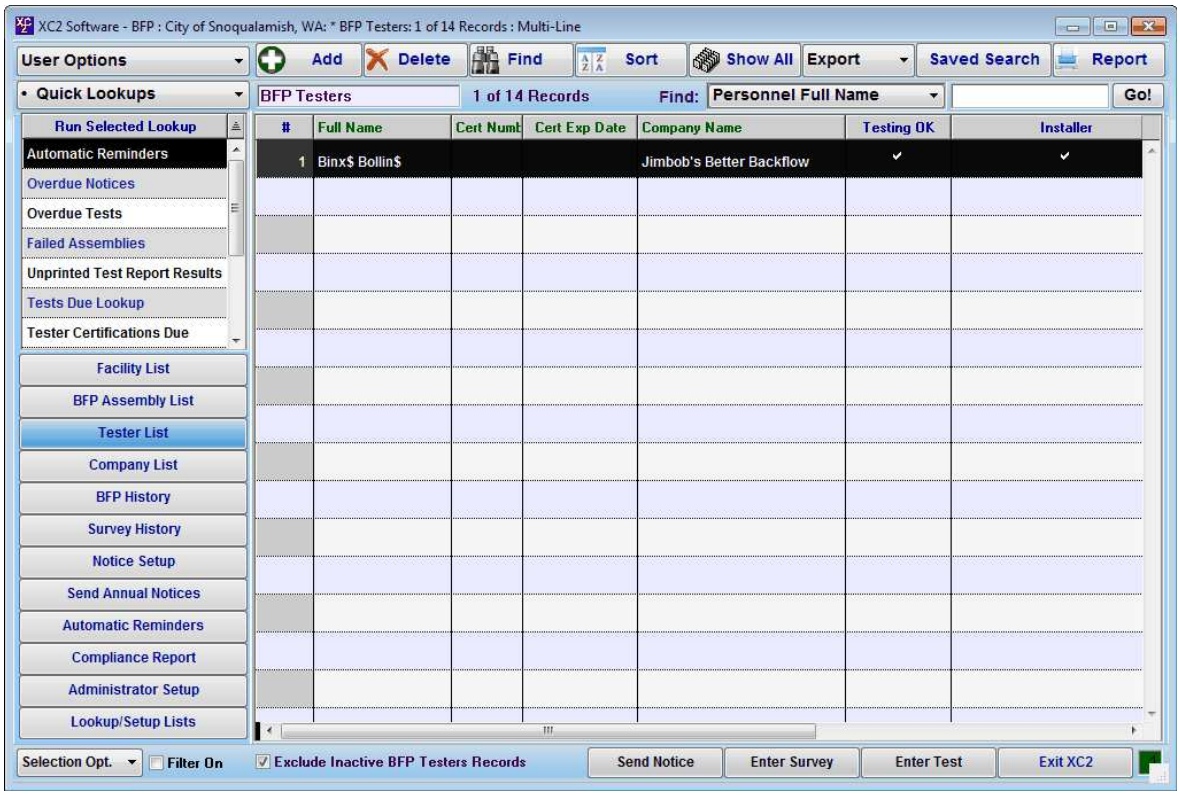


Notes:

Note

After moving Tester History, the tester record will still exist.

If you would like to remove or inactivate the tester record, you may do so now.



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.

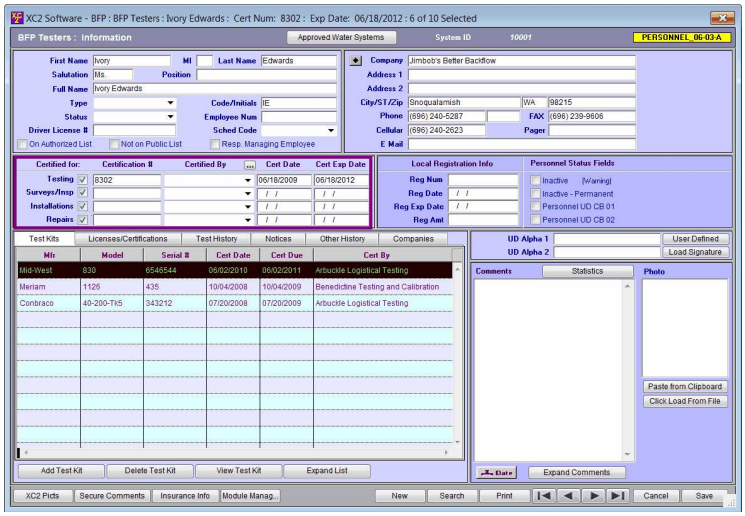
How to Select the Large Tester Screen

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.

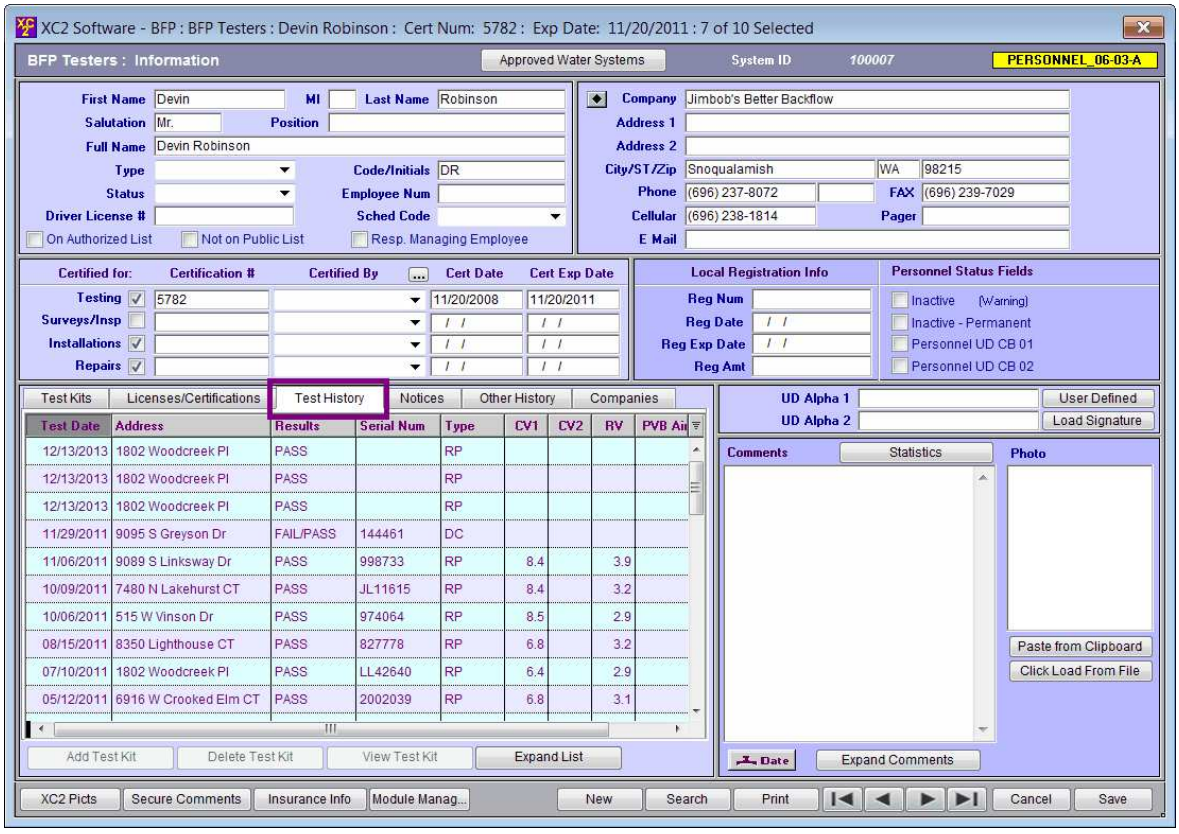
Test History

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



Notes:

Display Tester Analytics: e.g. How Many Tests, Repairs, etc.

KB Asset ID: 2672

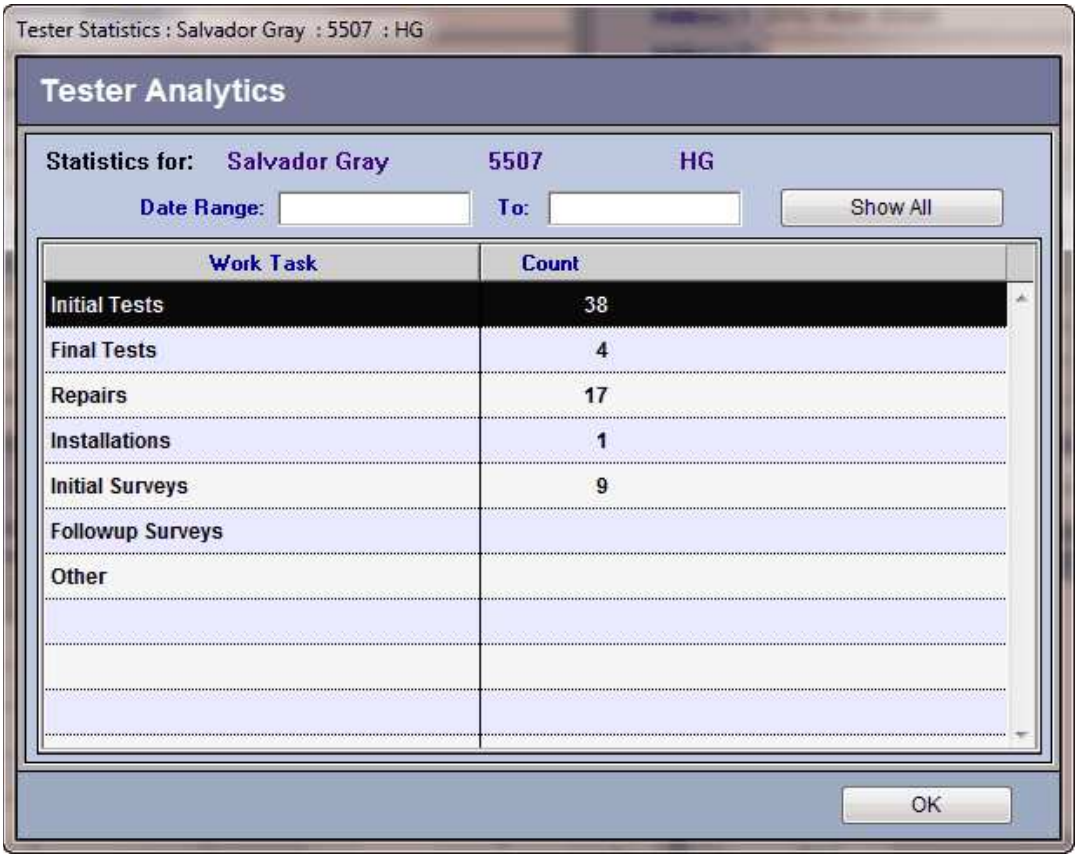
Tester Analytics provide a total count of tasks performed by a given tester.

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



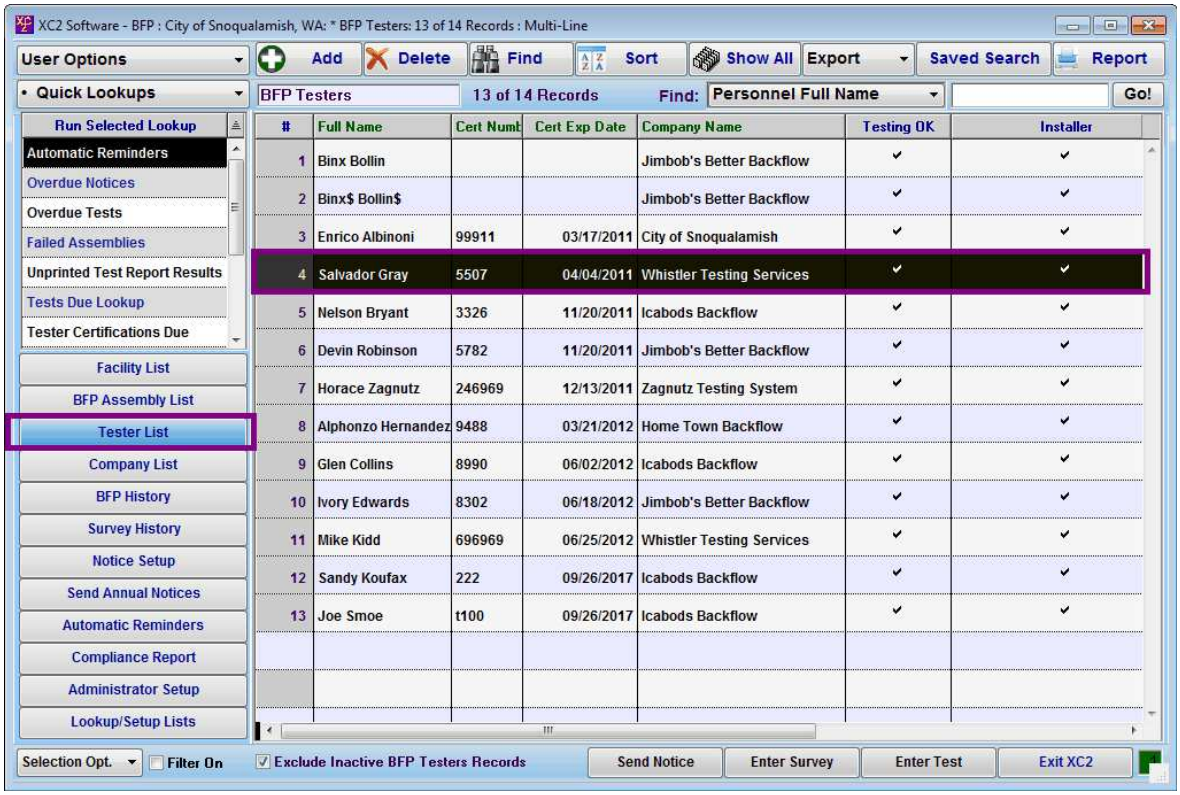
Notes:

Tester List

Tester Analytics is located inside the Tester Record

Click the Tester List

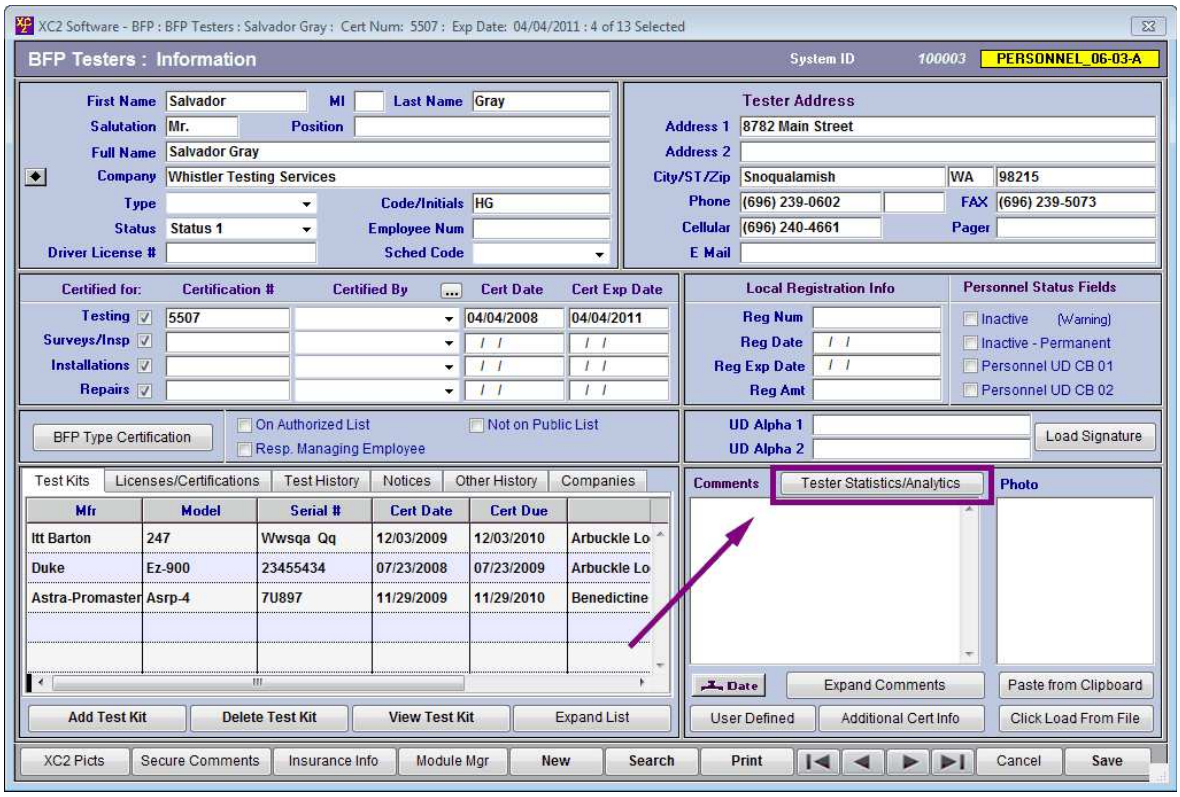
Double click on the Tester record you would like to open



Notes:

Tester Analytics

Click the Tester Statistics/Analytics Button

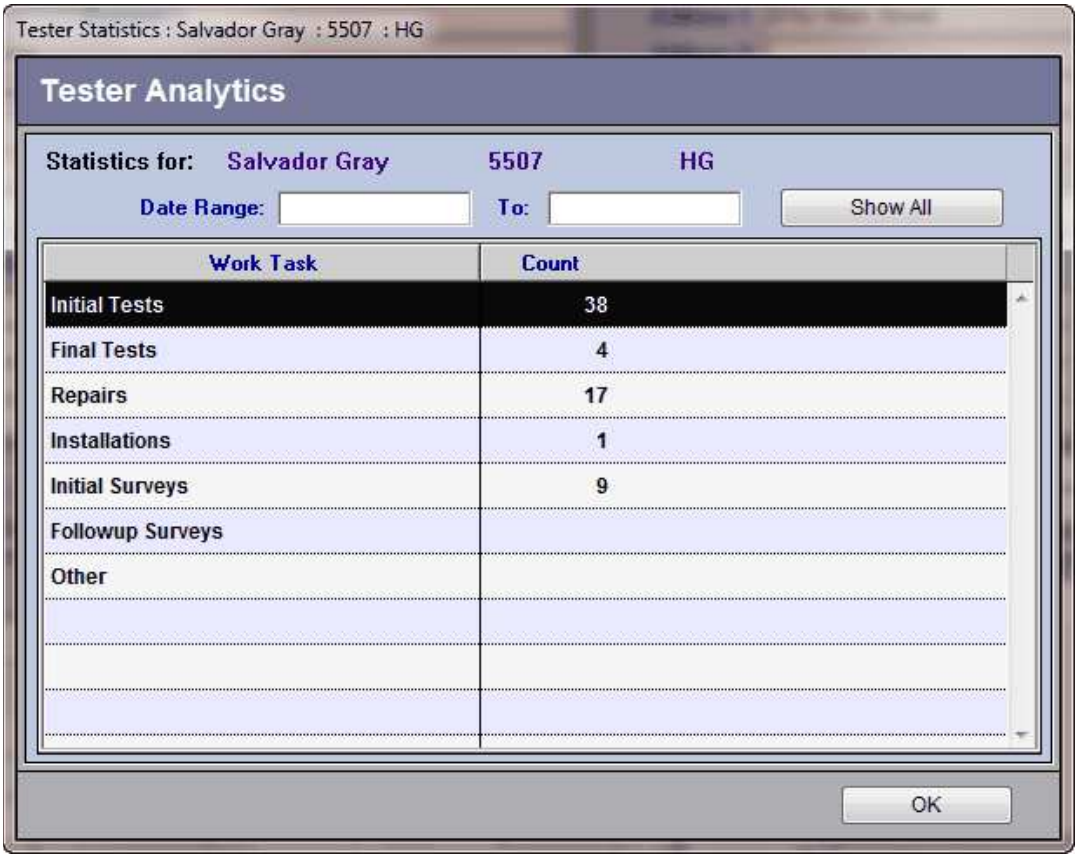


Notes:

Analytics Screen

The Tester Analytics Screen will appear

Click OK when complete



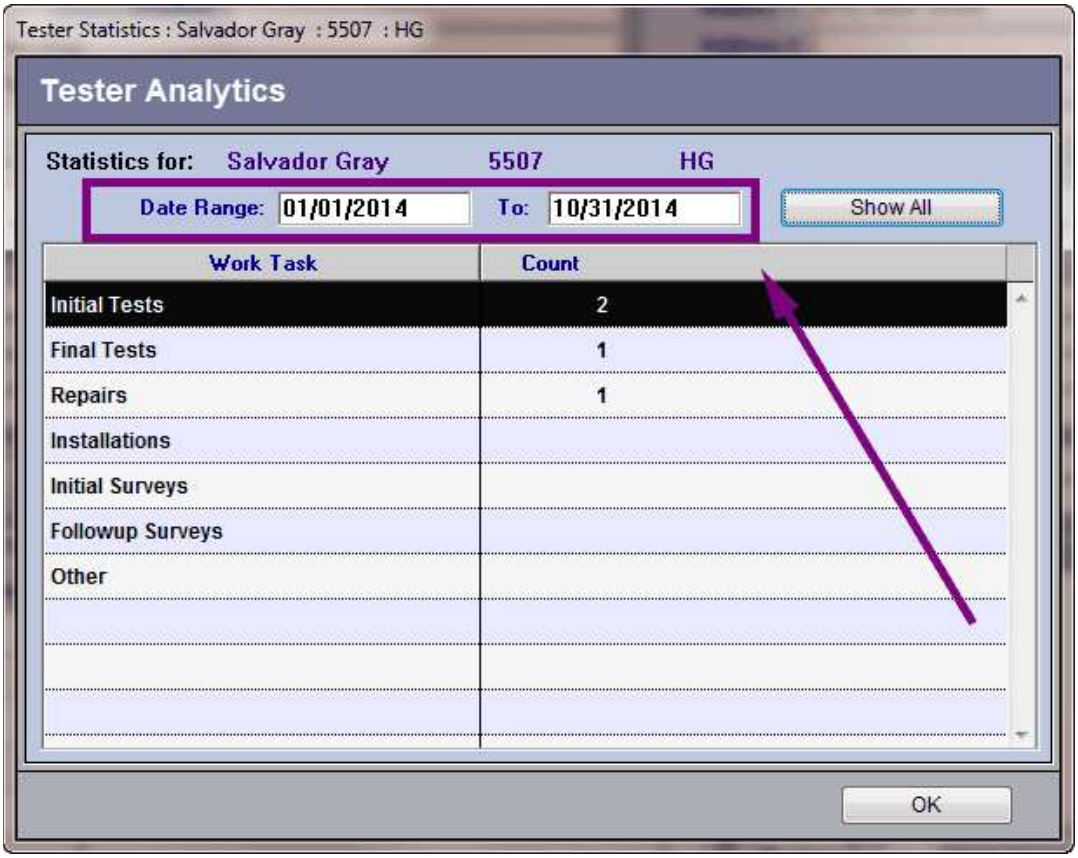
Notes:

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.



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

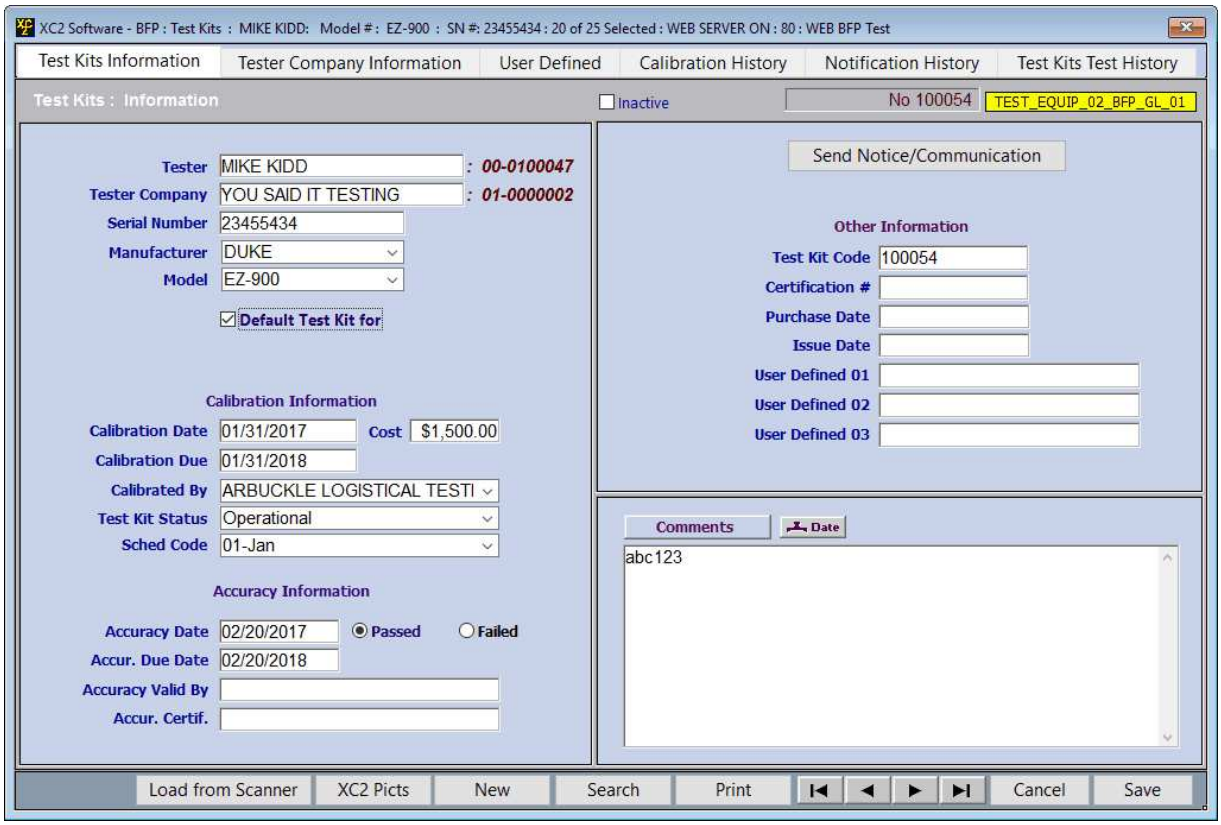
This is where the follow information can be entered

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



Notes:

XC2 Software Knowledge Base

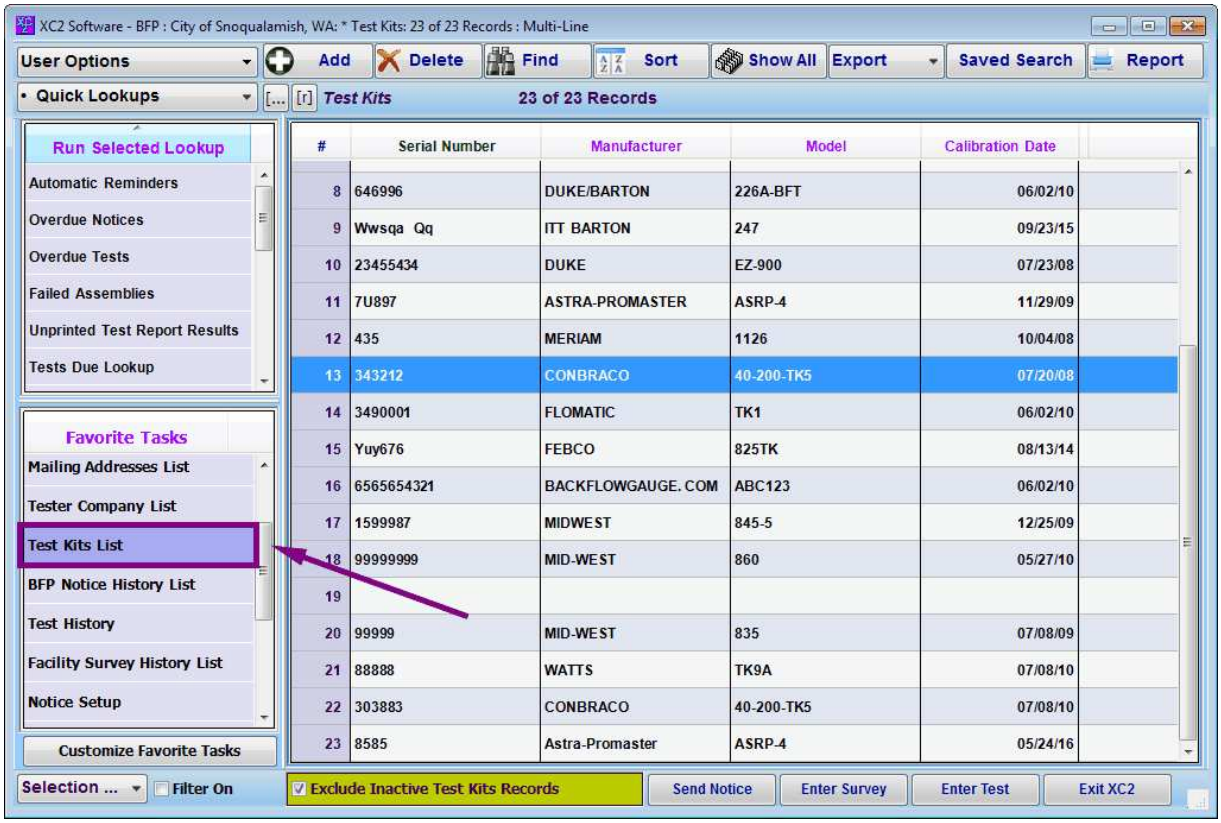
How to Create A New Test Kit Record

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

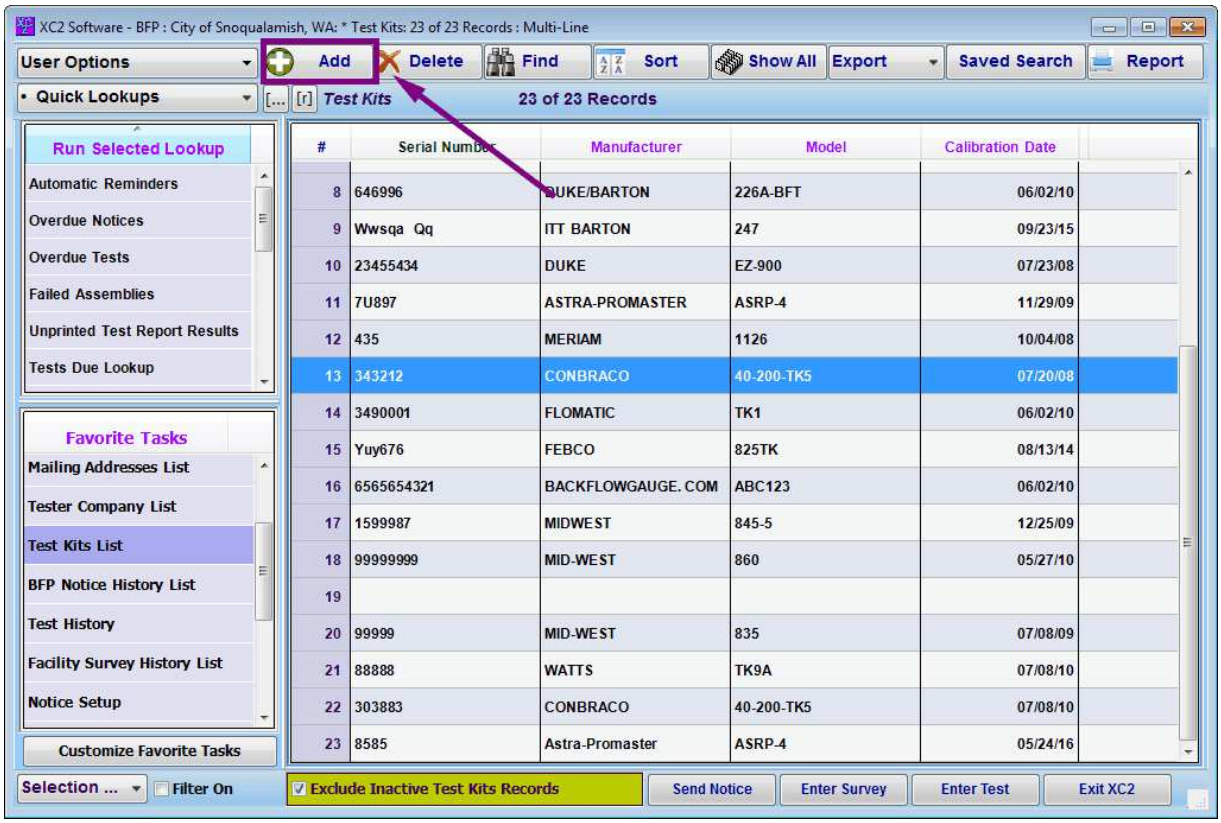


#	Serial Number	Manufacturer	Model	Calibration Date
8	646996	DUKE/BARTON	226A-BFT	06/02/10
9	Wwsqa Qq	ITT BARTON	247	09/23/15
10	23455434	DUKE	EZ-900	07/23/08
11	7U897	ASTRA-PROMASTER	ASRP-4	11/29/09
12	435	MERIAM	1126	10/04/08
13	343212	CONBRACO	40-200-TK5	07/20/08
14	3490001	FLOMATIC	TK1	06/02/10
15	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:

Create New Kit

To Create a new Kit click Add



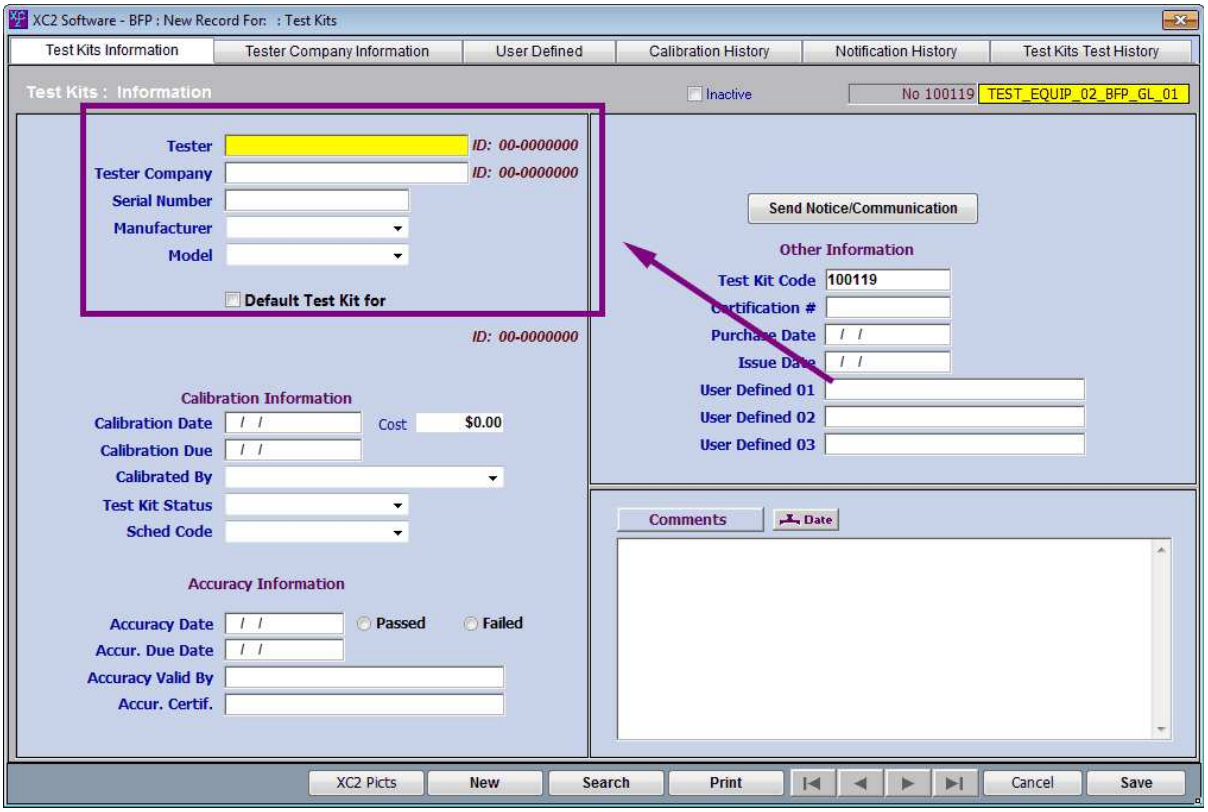
#	Serial Number	Manufacturer	Model	Calibration Date
8	646996	DUKE/BARTON	226A-BFT	06/02/10
9	Wwsqa Qq	ITT BARTON	247	09/23/15
10	23455434	DUKE	EZ-900	07/23/08
11	7U897	ASTRA-PROMASTER	ASRP-4	11/29/09
12	435	MERIAM	1126	10/04/08
13	343212	CONBRACO	40-200-TK5	07/20/08
14	3490001	FLOMATIC	TK1	06/02/10
15	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

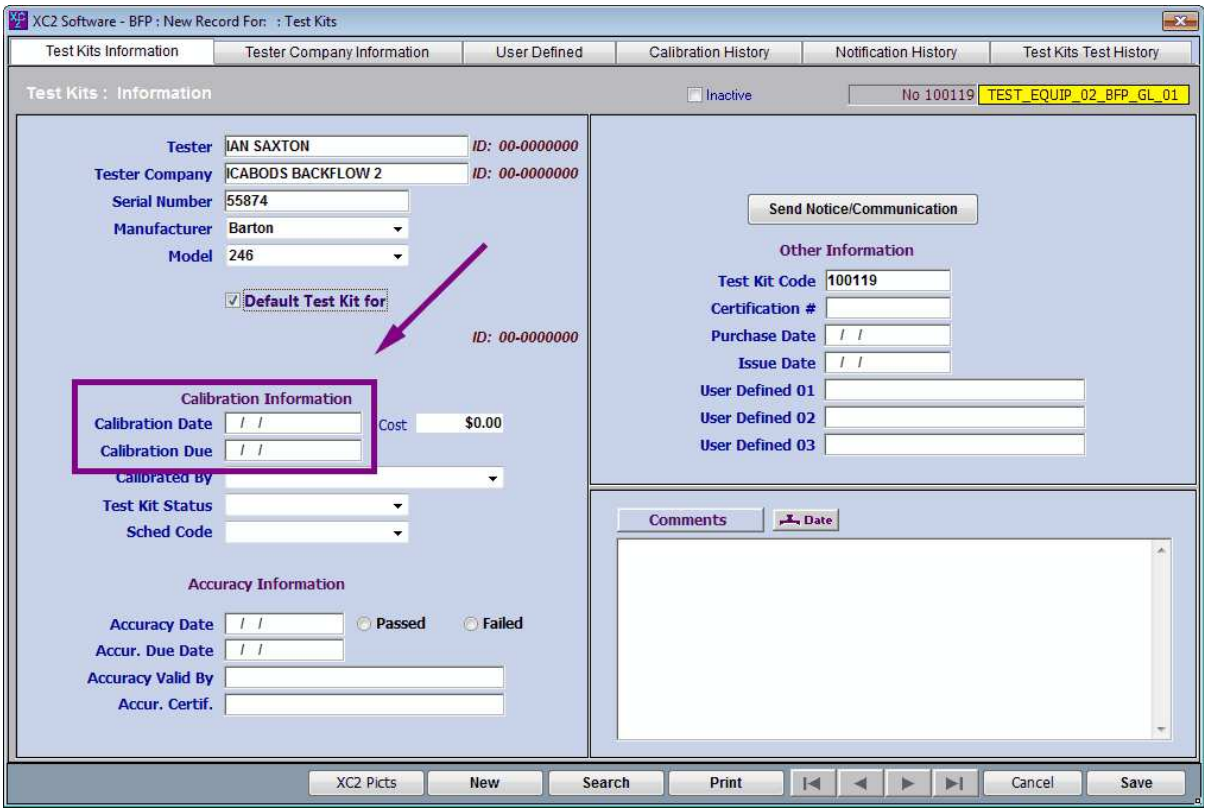
Tester
Company
Serial
Manufacture
Model



Notes:

Calibration information

Next Enter Calibration date and calibration due date

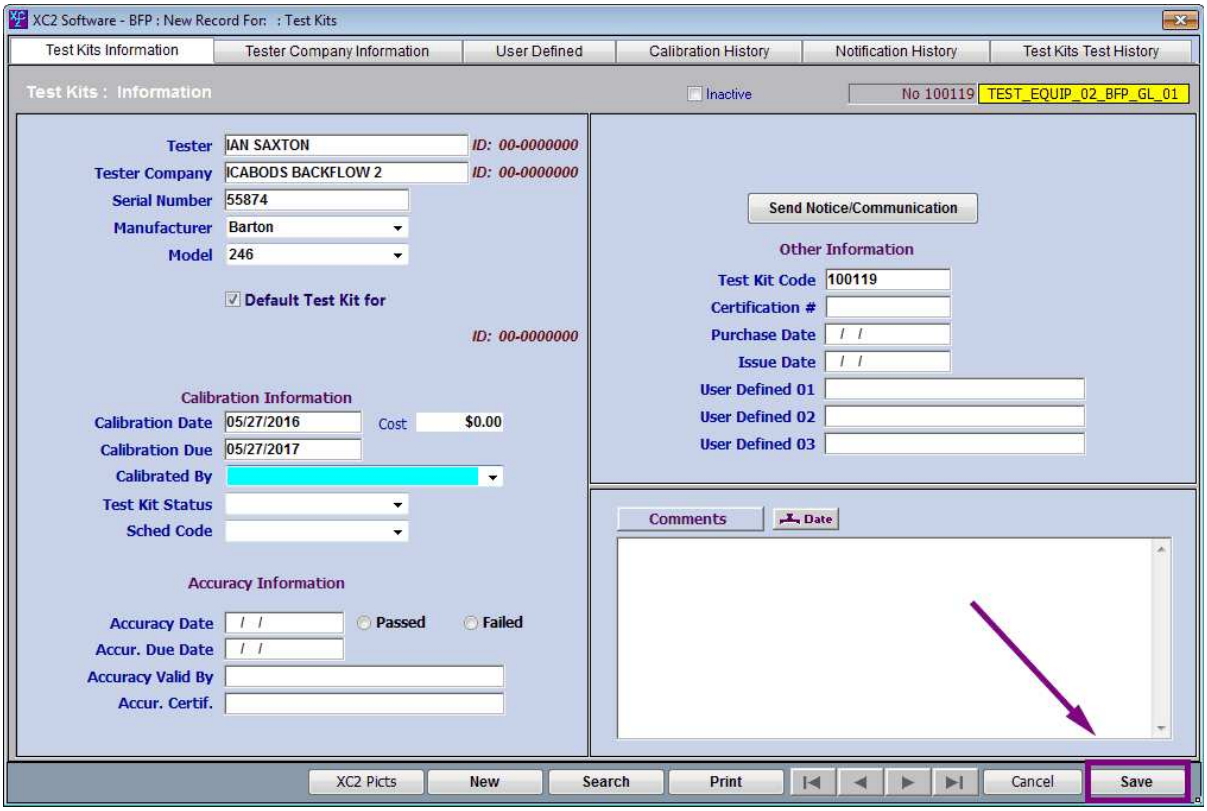


Notes:

Enter More or Save

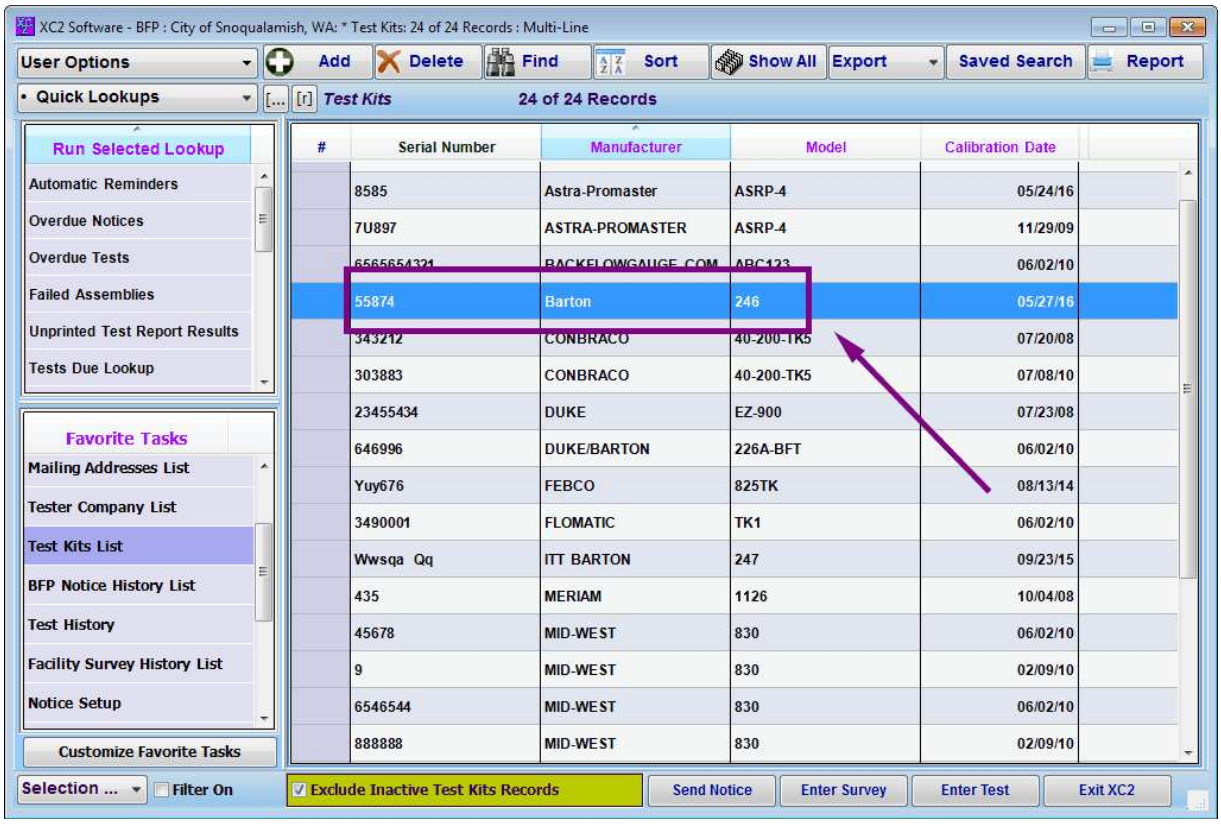
If you need or want to track more information go ahead and add what you need

Click Save when you are finished



Notes:

You have created a New test kit



Notes:

--- Page 6 of 6 ---

XC2 Software Knowledge Base

Adding New Test Kit From aTester Record

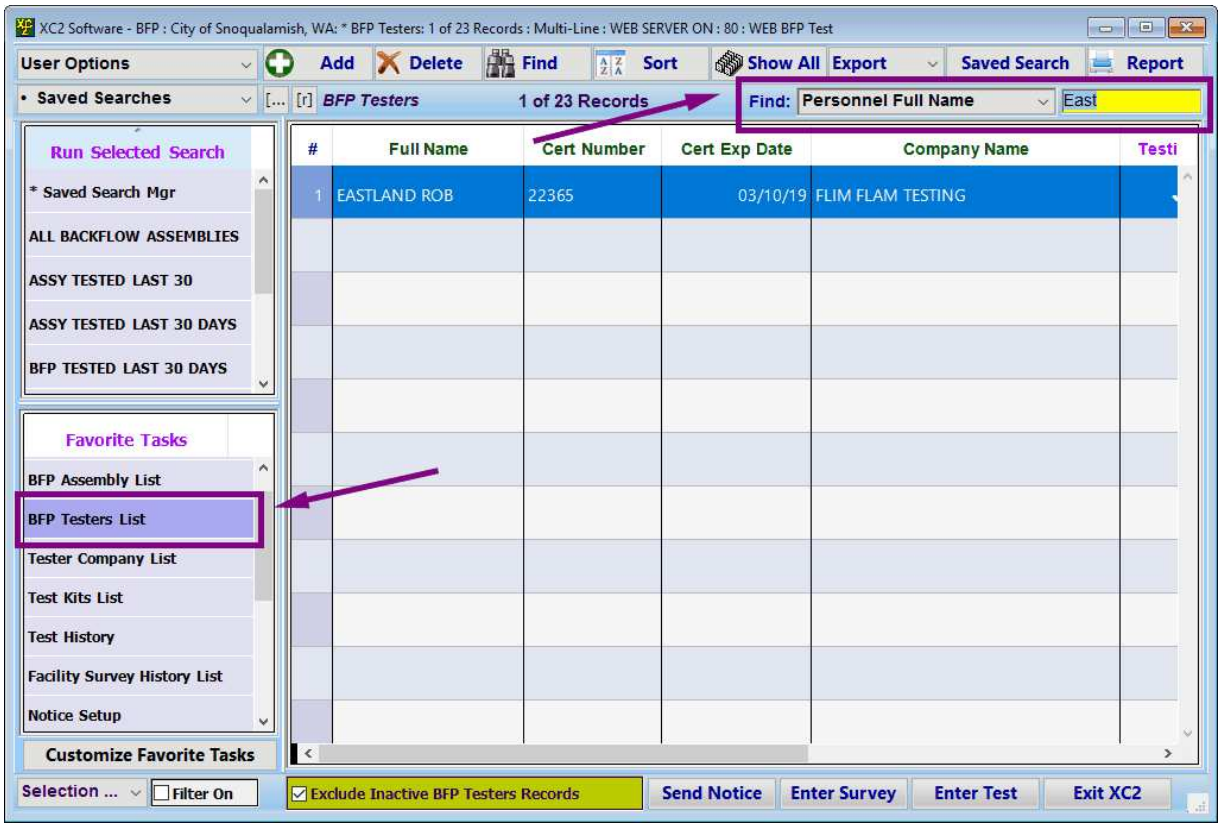
KB Asset ID: 3637

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.

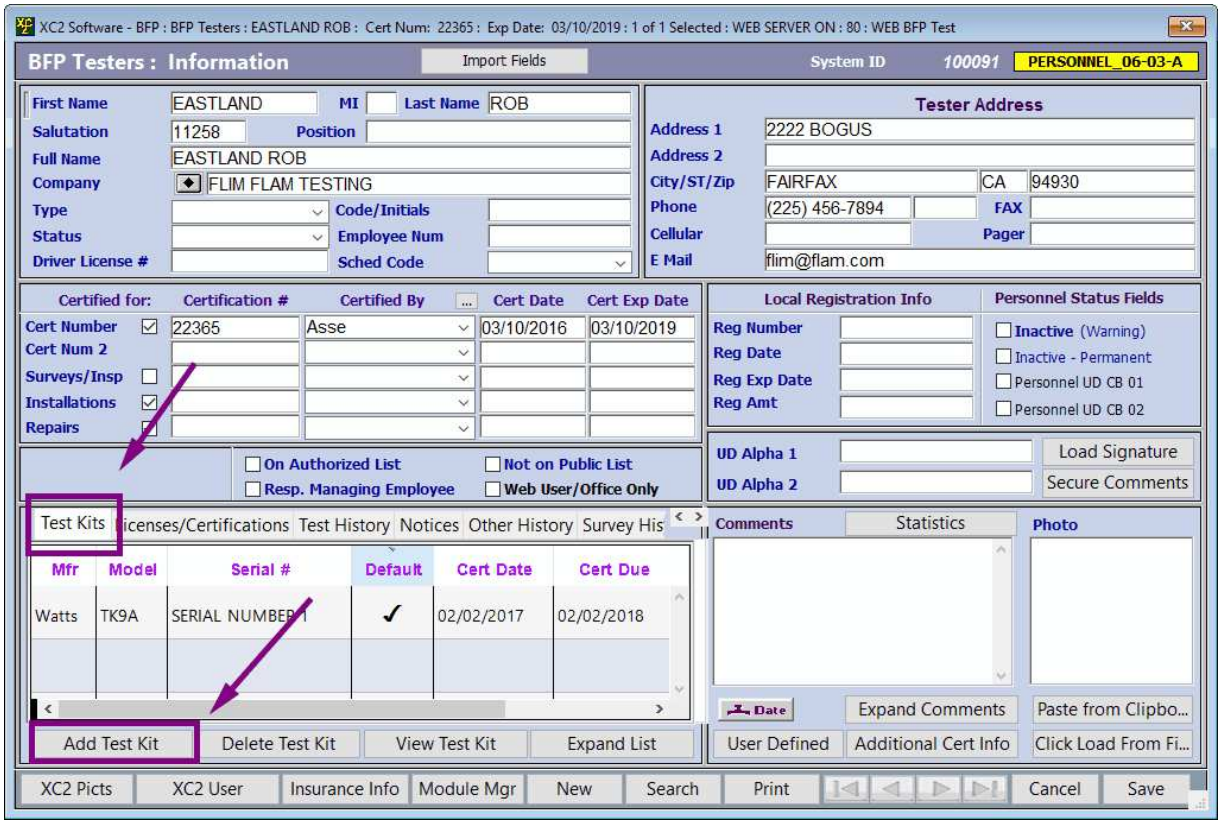


Notes:

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

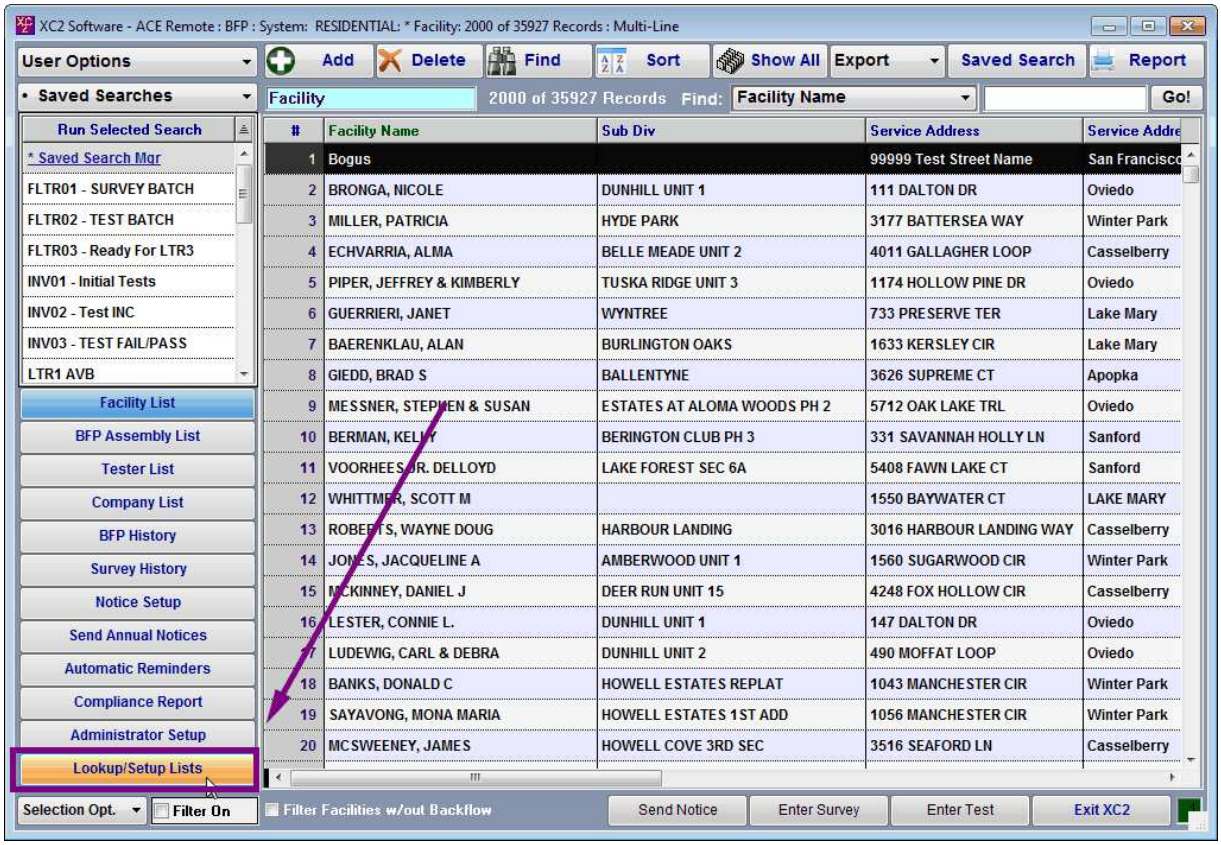
KB Asset ID: 2656

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 Resourses menu.

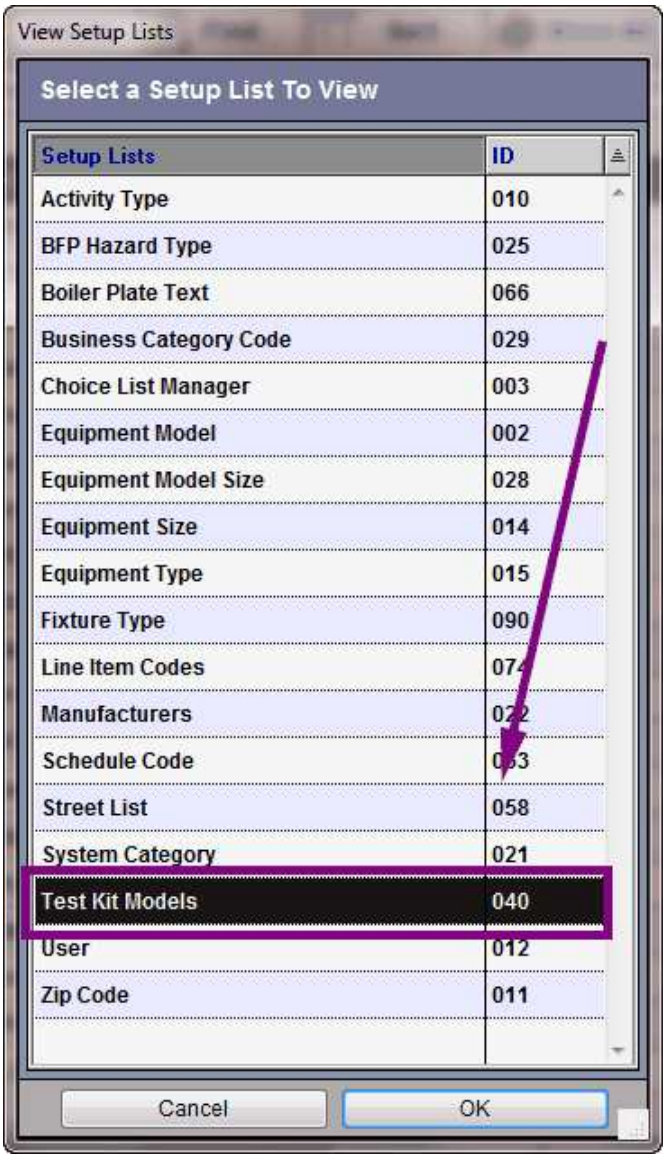
Click Lookup/Setup Lists



Notes:

Test Kit Models

Double Click Choice Test Kit Models

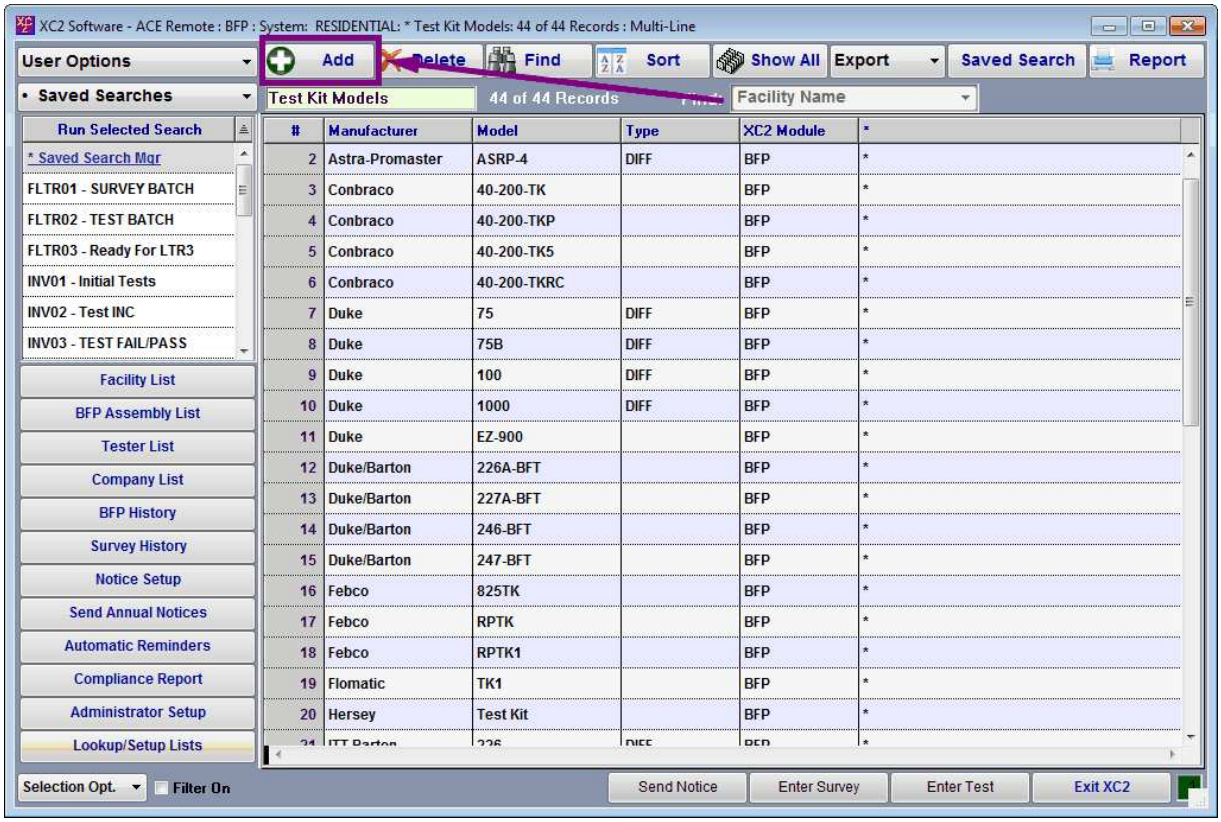


Notes:

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



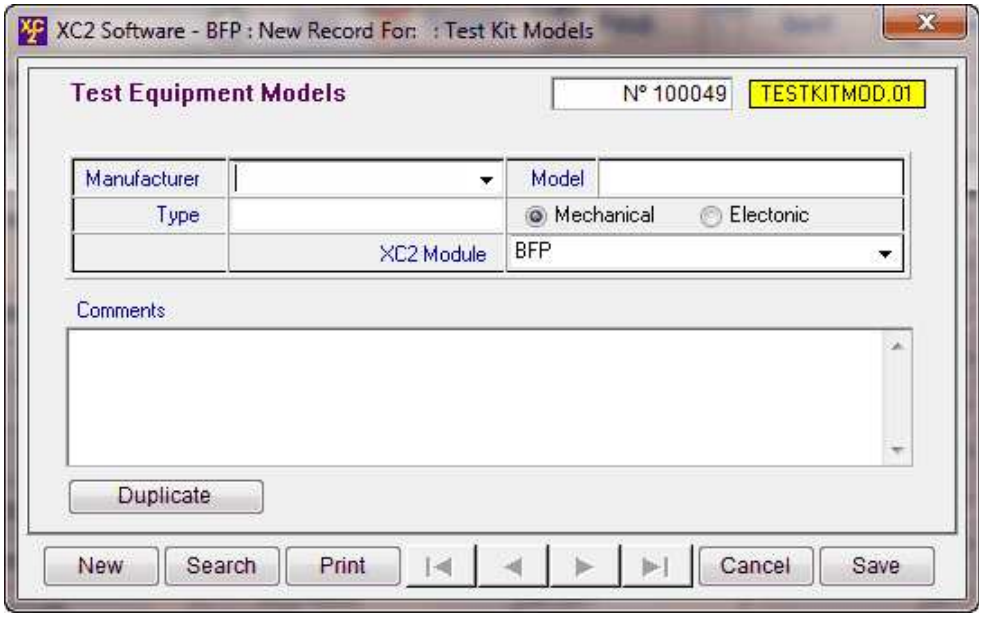
#	Manufacturer	Model	Type	XC2 Module	*
2	Astra-Promaster	ASRP-4	DIFF	BFP	*
3	Conbraco	40-200-TK		BFP	*
4	Conbraco	40-200-TKP		BFP	*
5	Conbraco	40-200-TK5		BFP	*
6	Conbraco	40-200-TKRC		BFP	*
7	Duke	75	DIFF	BFP	*
8	Duke	75B	DIFF	BFP	*
9	Duke	100	DIFF	BFP	*
10	Duke	1000	DIFF	BFP	*
11	Duke	EZ-900		BFP	*
12	Duke/Barton	226A-BFT		BFP	*
13	Duke/Barton	227A-BFT		BFP	*
14	Duke/Barton	246-BFT		BFP	*
15	Duke/Barton	247-BFT		BFP	*
16	Febco	825TK		BFP	*
17	Febco	RPTK		BFP	*
18	Febco	RPTK1		BFP	*
19	Flomatic	TK1		BFP	*
20	Hersey	Test Kit		BFP	*

Notes:

New Model

After Clicking Add a Blank test kit records will appear

- Choose a Manufacture
- Model
- Type
- Comments



Notes:

XC2 Software Knowledge Base

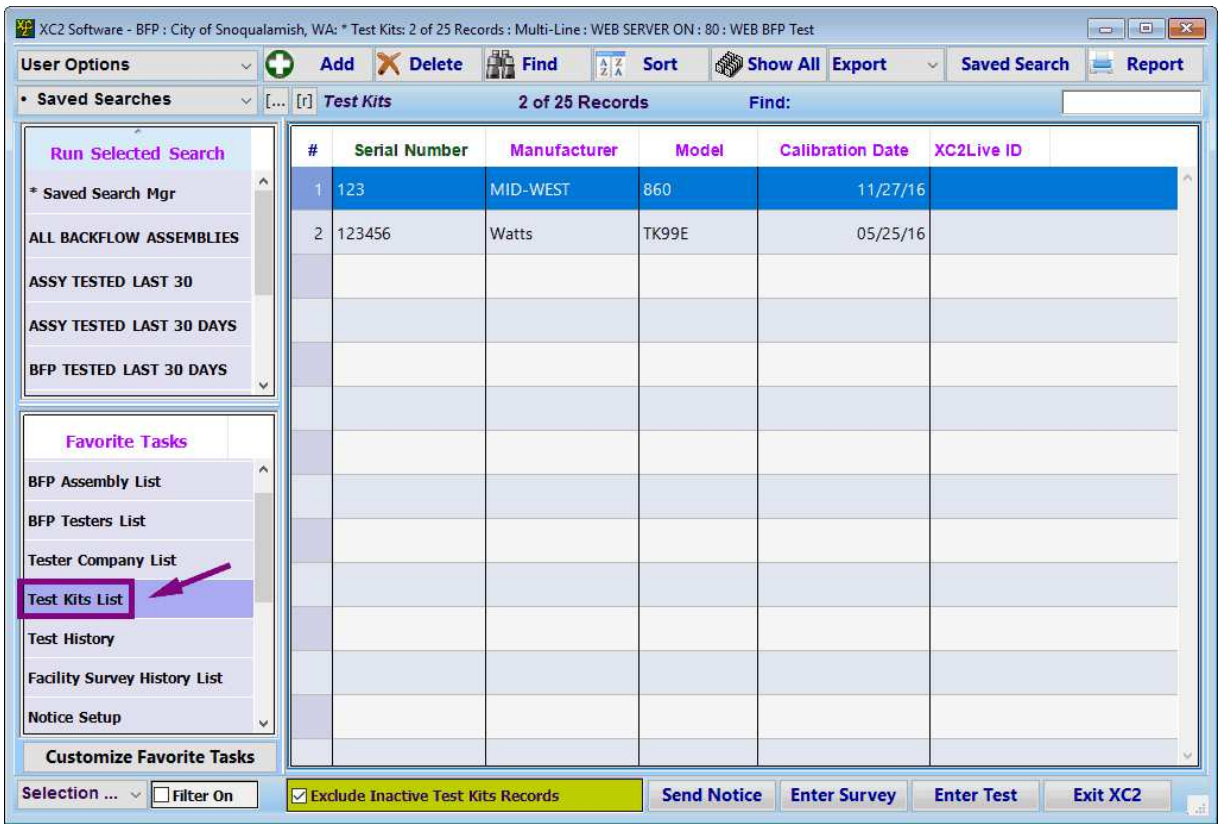
Update Test Kit Calibration

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

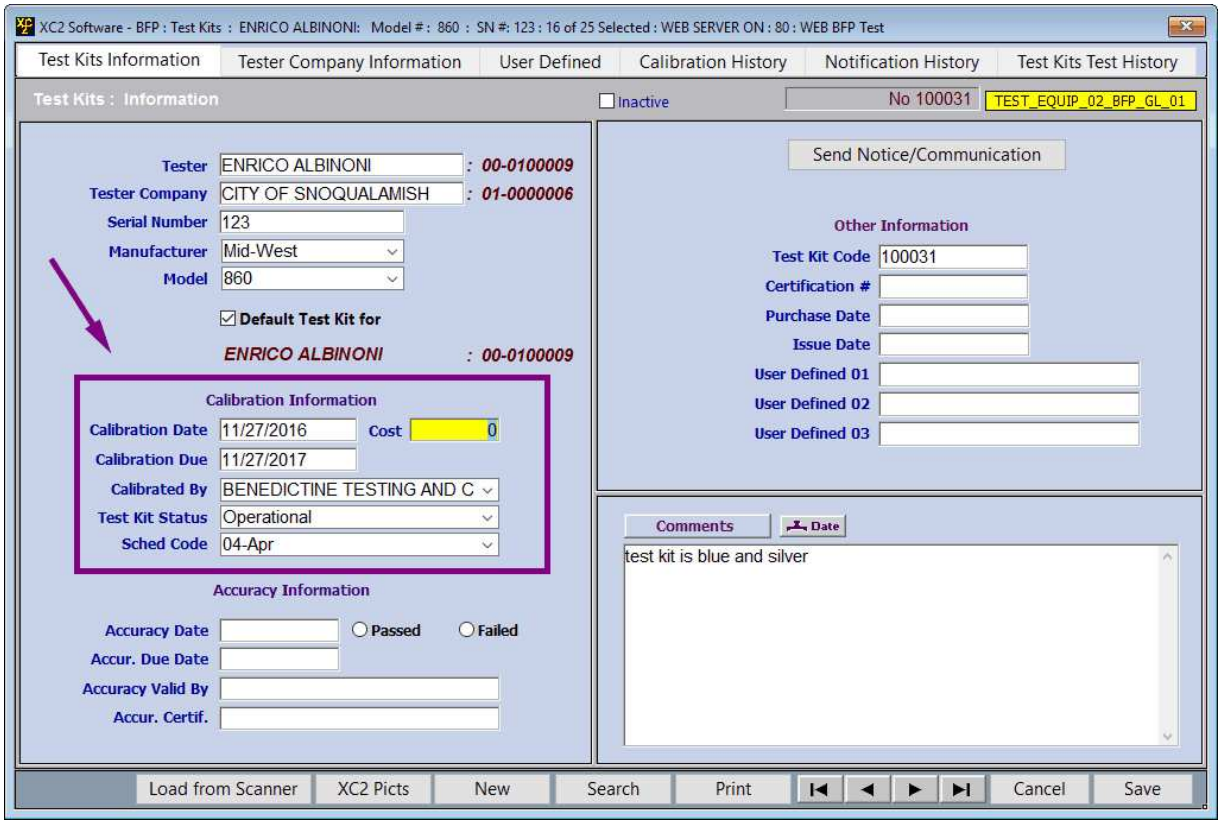


Notes:

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.



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

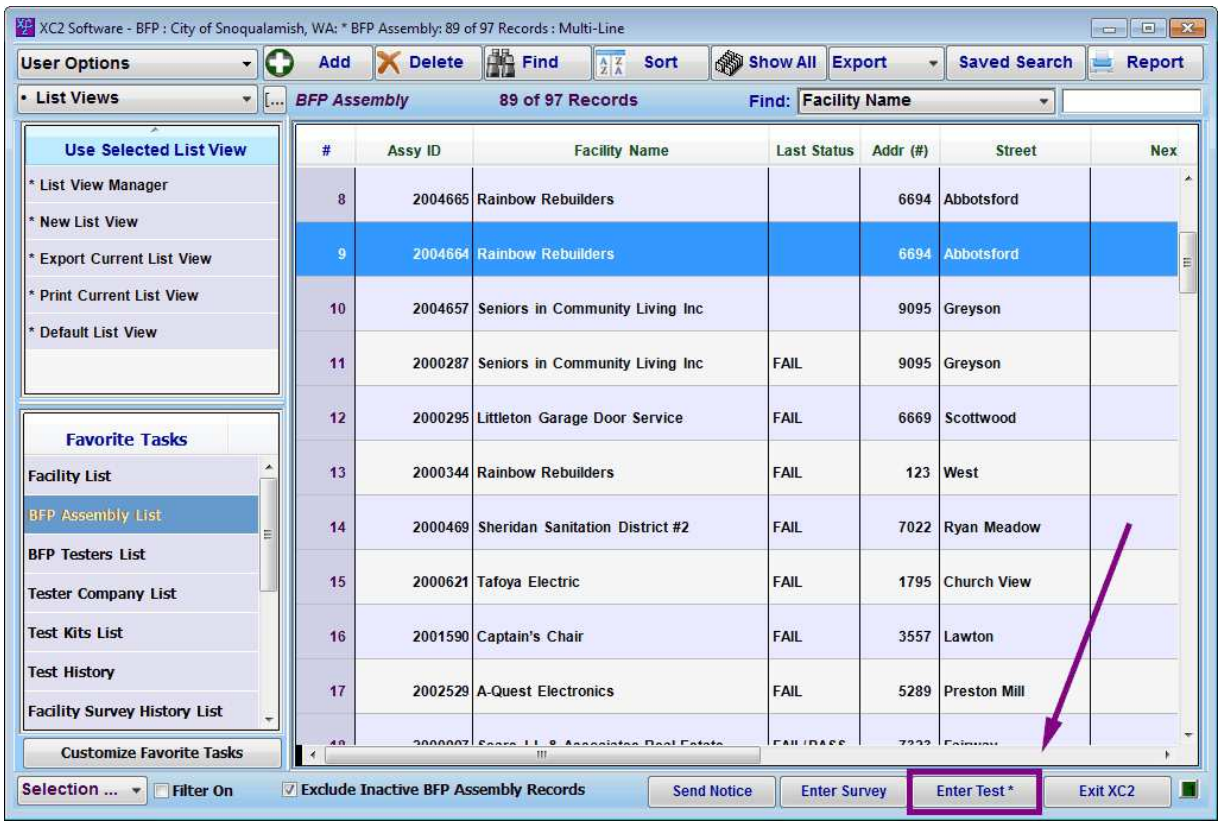
How to Enter Test From Main Screen

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 orner of the Main Screen click Enter Test.

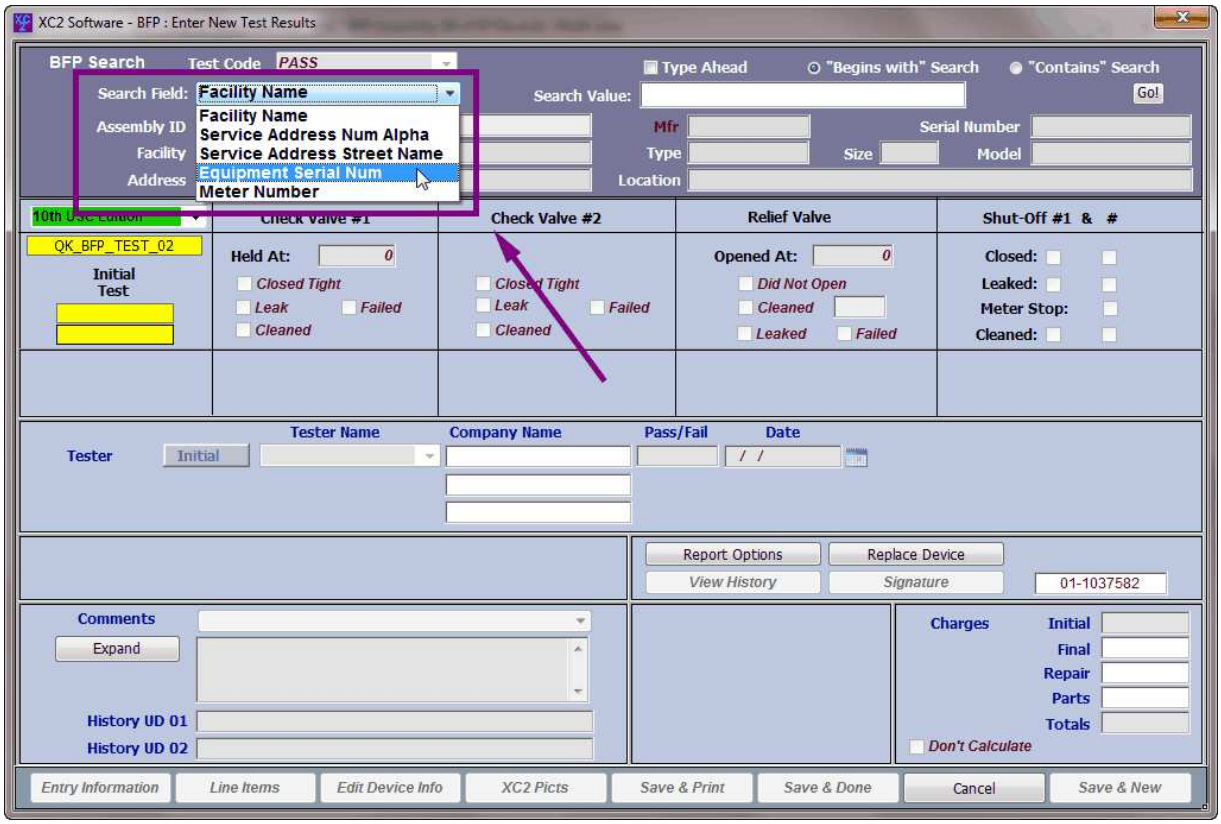


Notes:

Choose the search field

Choose the search field you would like to use
The two most common are

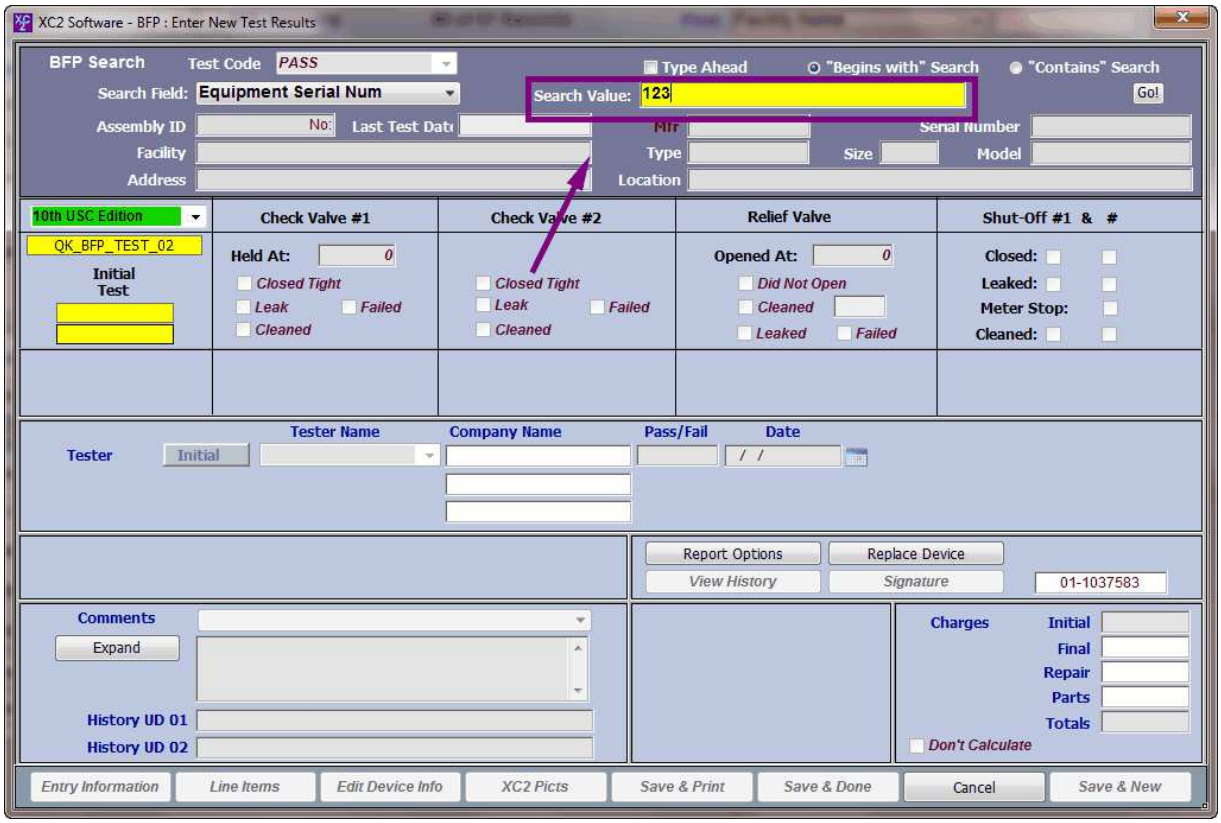
1) Facility Name
2) Serial Number



Notes:

Search For the Assembly

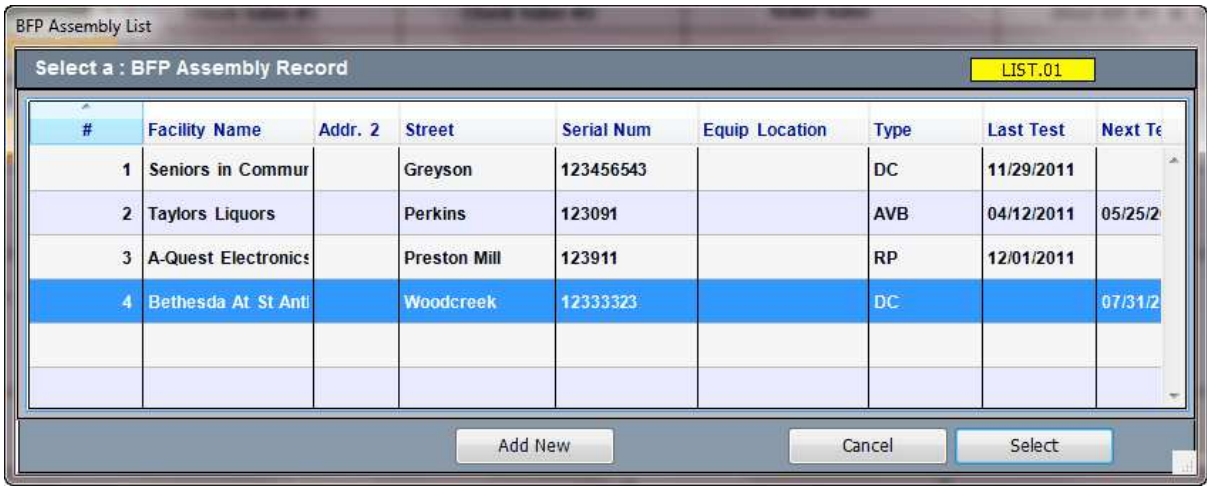
Search for the assembly that you would like to enter the test for.



Notes:

Multiple Assemblies

If multiple assemblies are found, select the correct assembly



Notes:

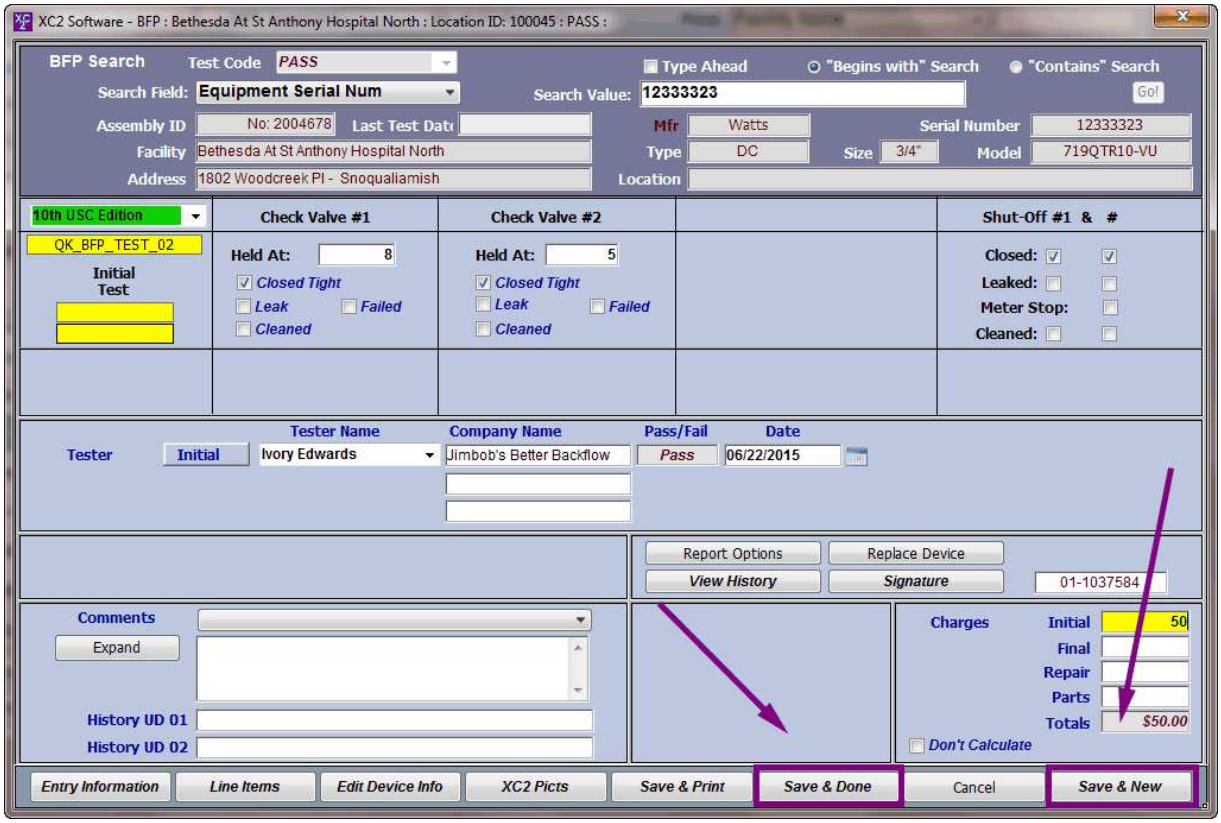
Enter the Test

If you have more tests to enter

Click Save and New

If you are done

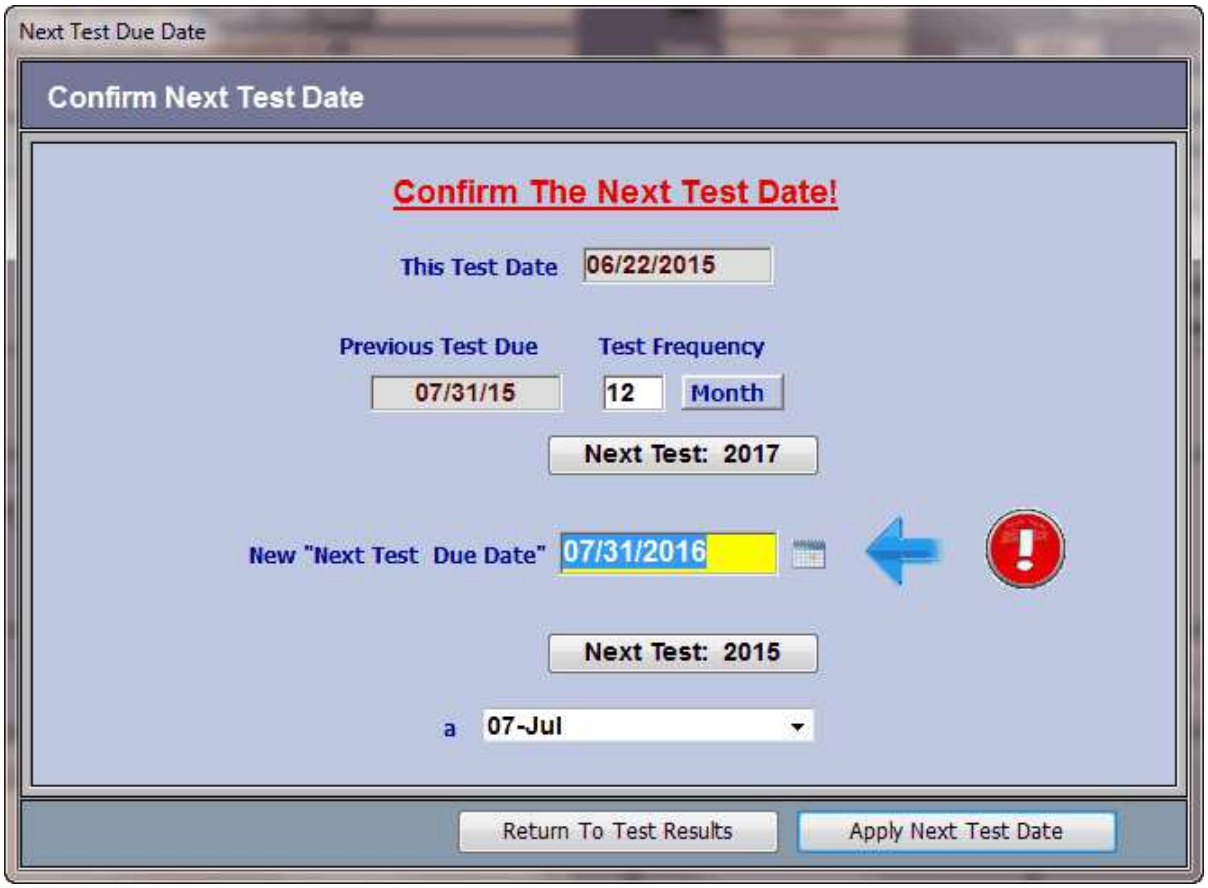
Click Save and Done



Notes:

What Happens if I click Save and New?

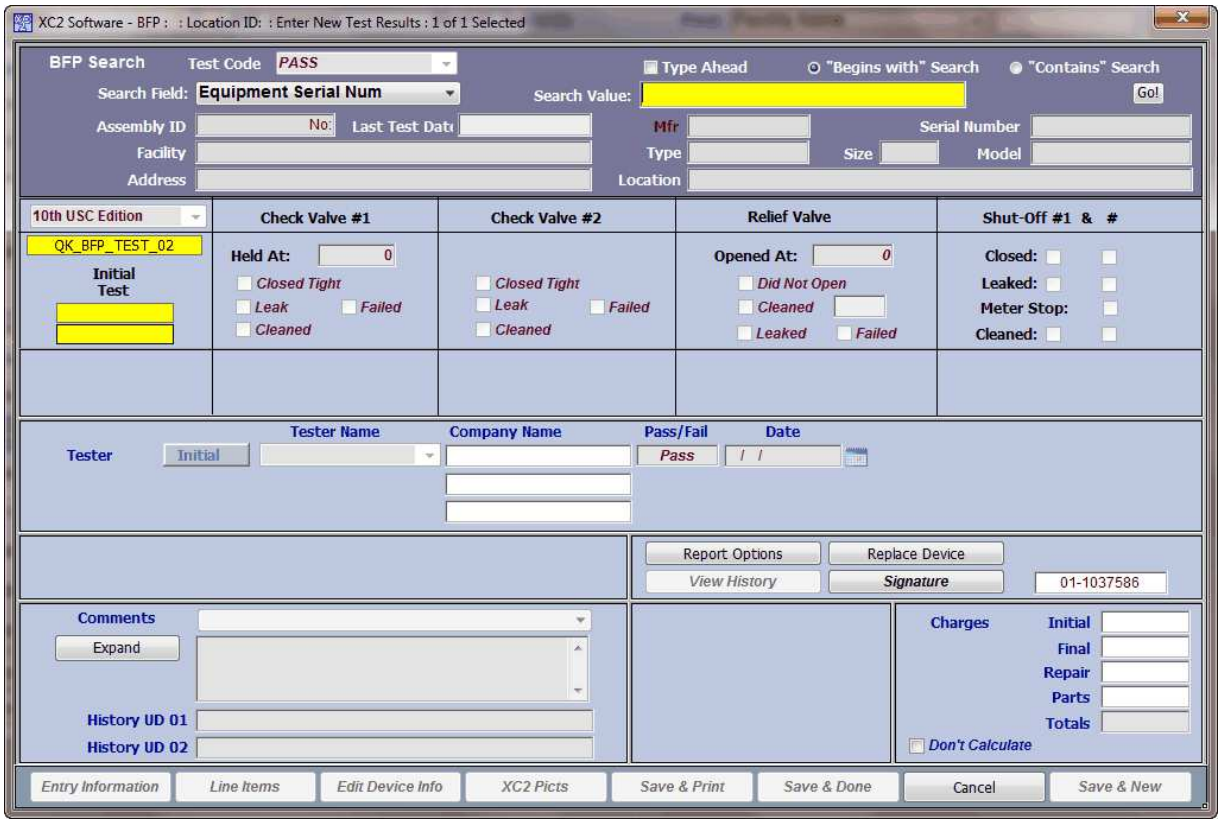
If you click Save and New, you will be asked to comfirm the correct next test due date.



Notes:

After Confirmation

After the test confirmation, XC2 will bring you back to the test entry page. Enter your next test.



Notes:

XC2 Software Knowledge Base

Quick Test Entry for All Backflow Assemblies at a Facility

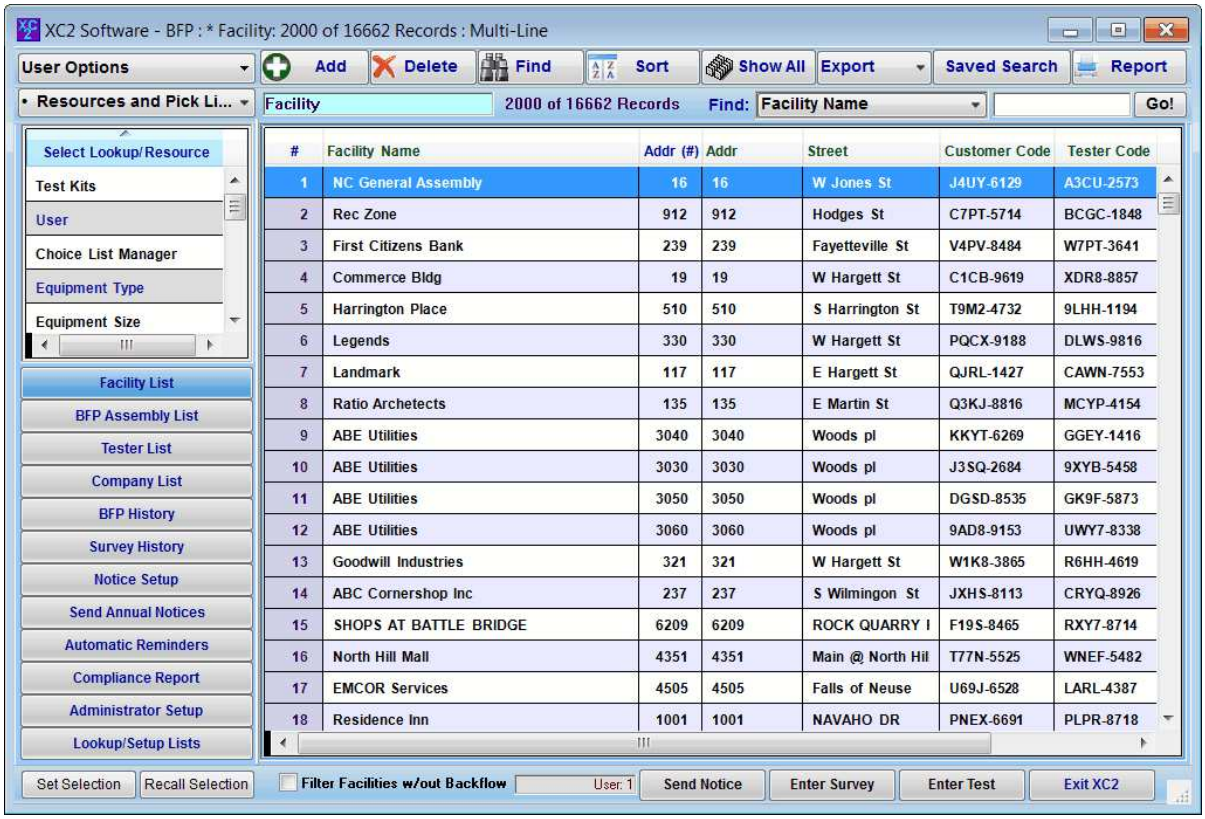
KB Asset ID: 2159

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

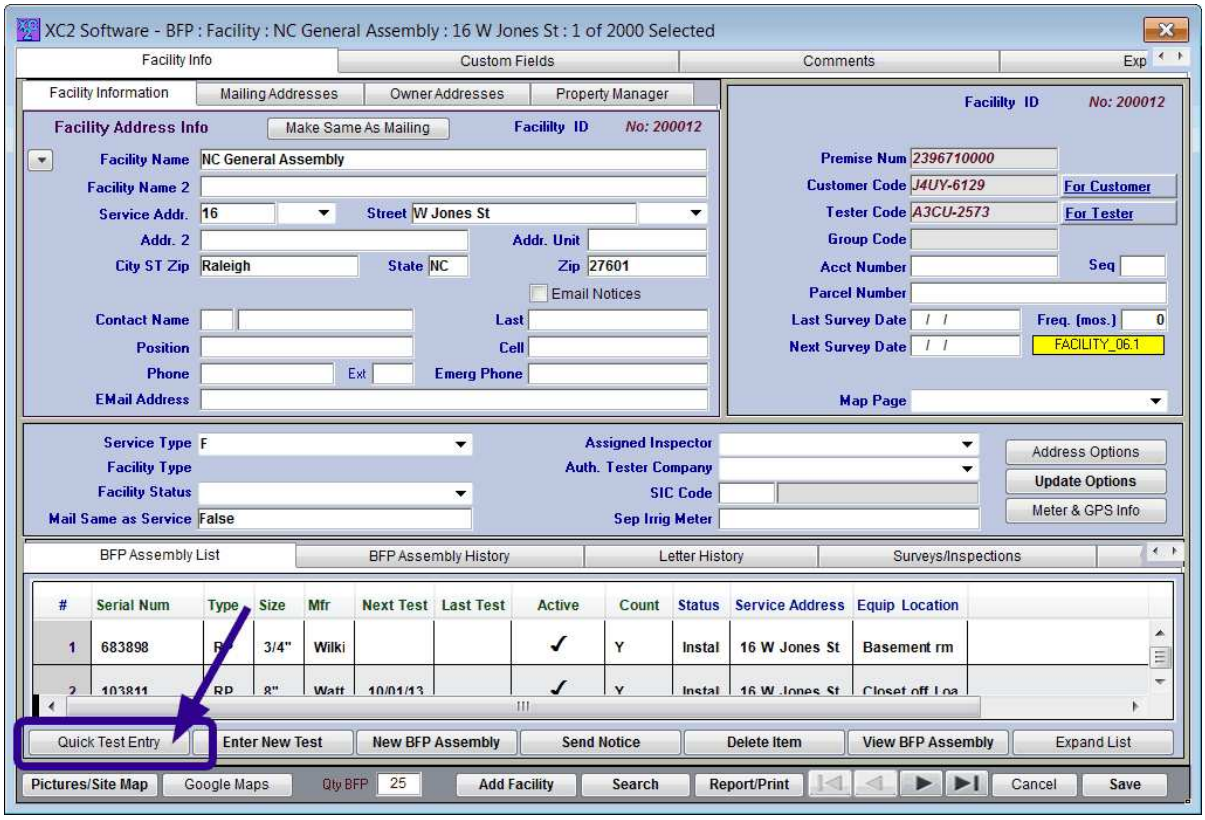


#	Facility Name	Addr (#)	Addr	Street	Customer Code	Tester Code
1	NC General Assembly	16	16	W Jones St	J4UY-6129	A3CU-2573
2	Rec Zone	912	912	Hodges St	C7PT-5714	BCGC-1848
3	First Citizens Bank	239	239	Fayetteville St	V4PV-8484	W7PT-3641
4	Commerce Bldg	19	19	W Hargett St	C1CB-9619	XDR8-8857
5	Harrington 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	GGEY-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 Hil	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

Notes:

Click the Button: Quick Test Entry

Facility Entry Screen



Notes:

Enter the Test Results for all backflow assemblies

This is the quick test entry screen. To enter tests you need to enter the folowing information into the fields.

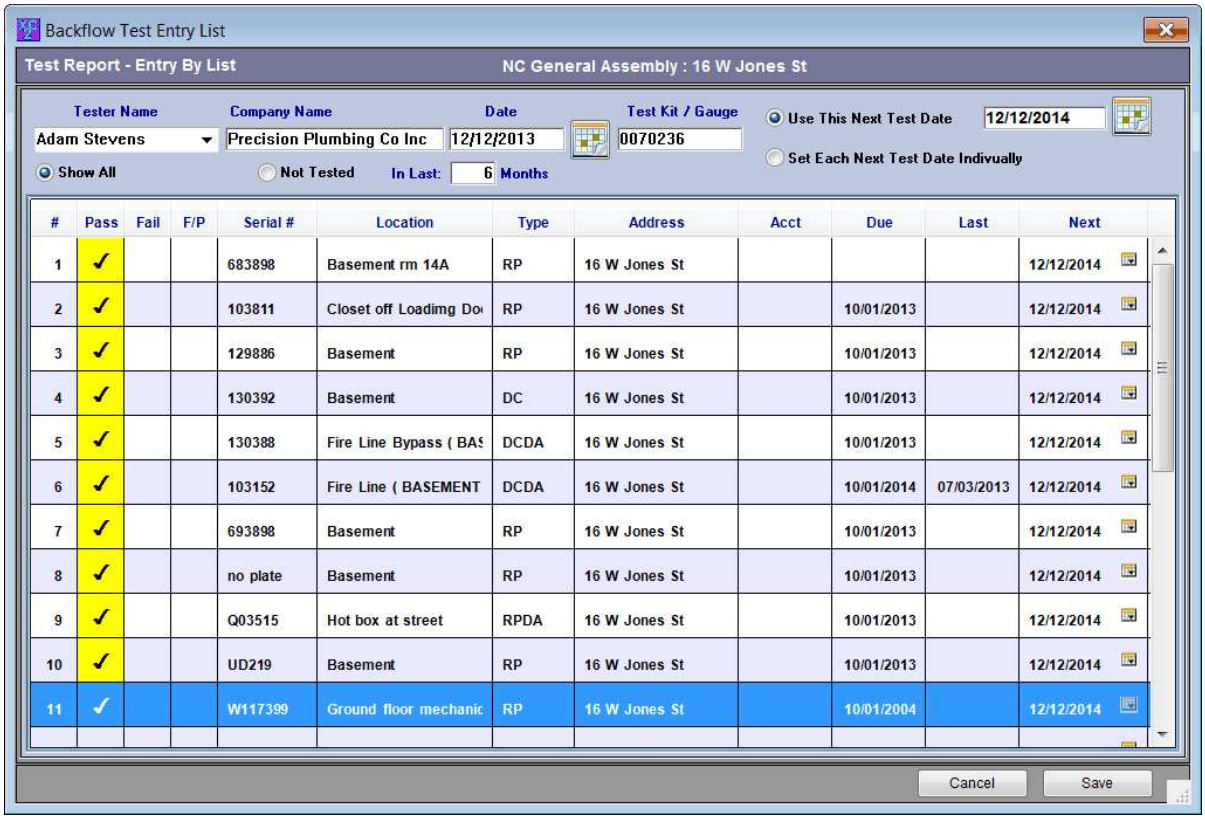
- Select the Tester
- Select the Test Date
- Select the Test Kit Used
- Determine the Next Test Date
- Individually per assemby
- or make all next test dates the same
- Show the backflow assemblies for a specifc time frame or show all for this facility

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



Notes:

XC2 Software Knowledge Base

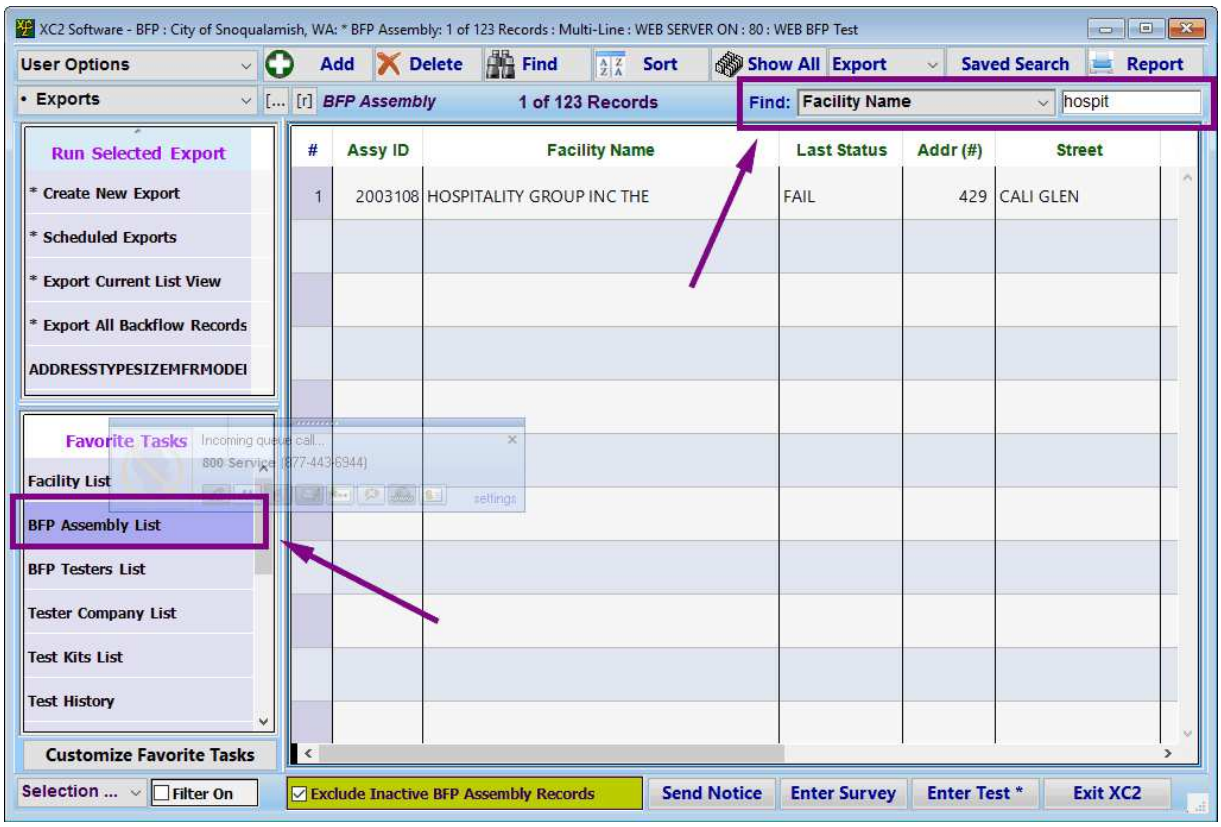
Enter Tests From Within the Backflow Assembly Record

KB Asset ID: 3610

This page describes how to enter a backflow assembly test from within the backflow assemly record.

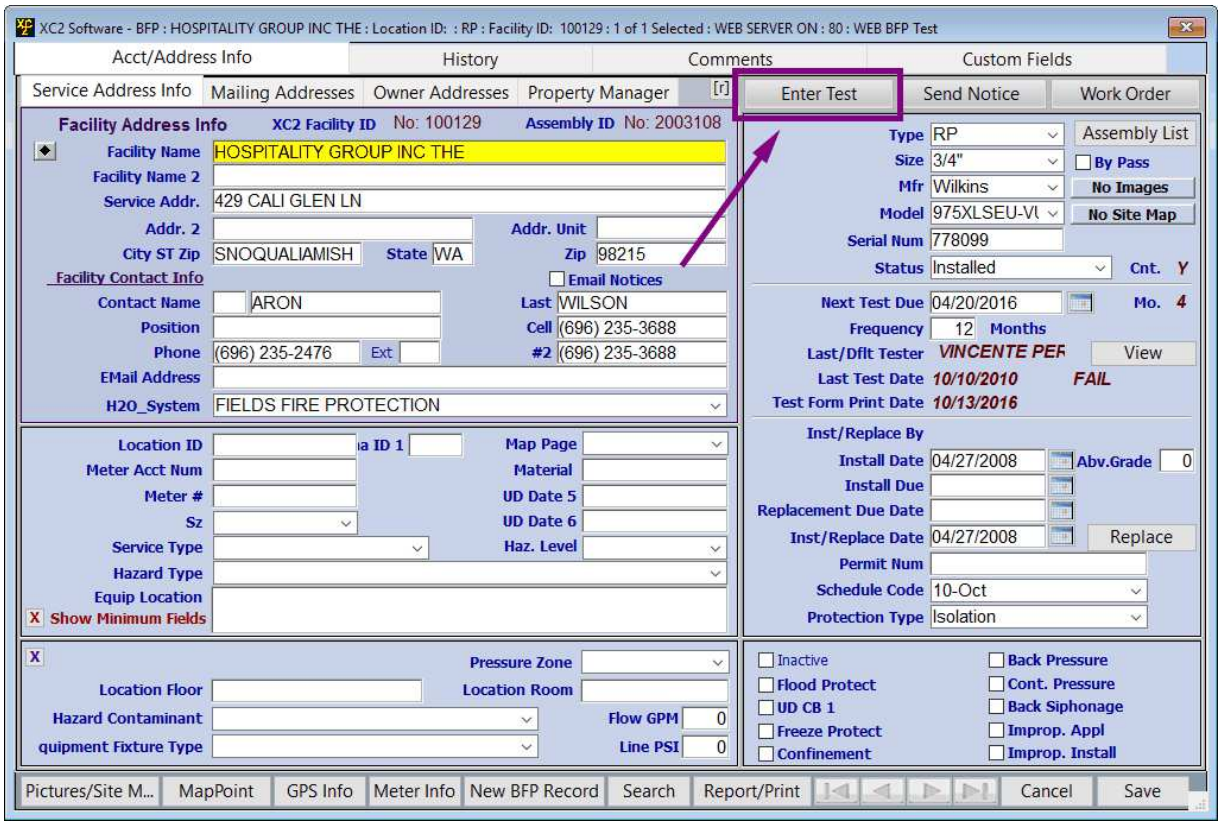
Search For The Backflow Assembly

Open the record by double clicking



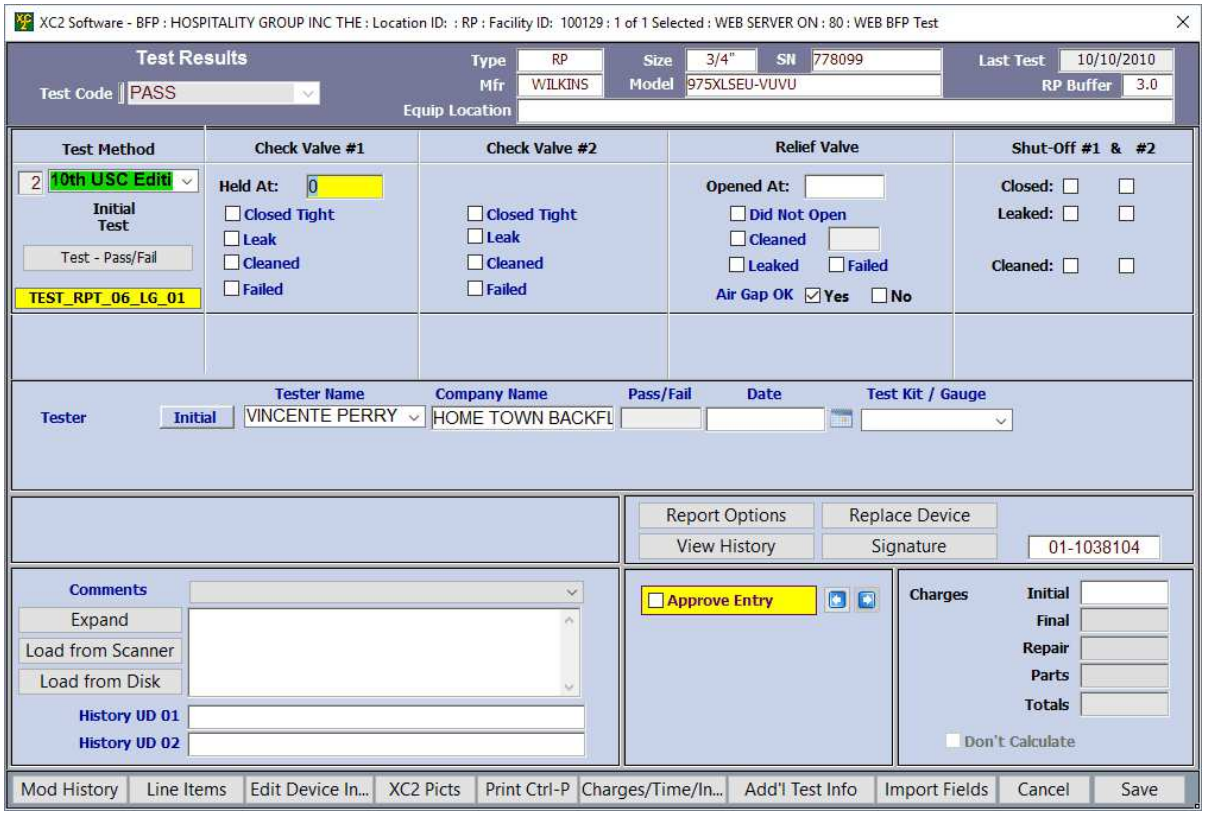
Notes:

Click Enter Test



Notes:

Enter Test



Notes:

XC2 Software Knowledge Base

XC2's Test Report Form Scanning Feature

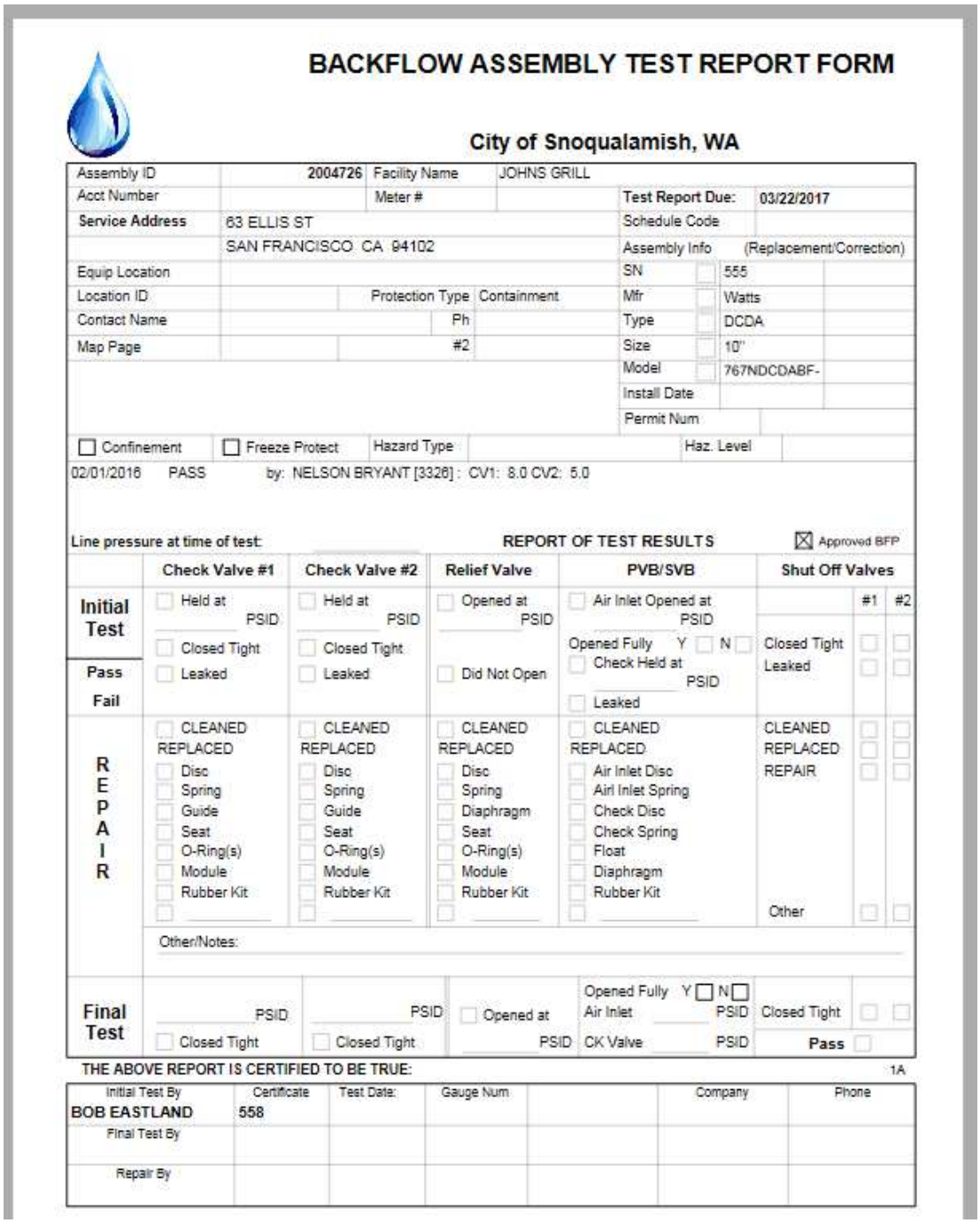
KB Asset ID: 3591

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	63 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	

☐ Confinement ☐ 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 ☒ Approved BFP

	Check Valve #1	Check Valve #2	Relief Valve	PVB/SVB	Shut Off Valves	#1	#2
Initial Test	☐ Held at PSID	☐ Held at PSID	☐ Opened at PSID	☐ Air Inlet Opened at PSID			
	☐ Closed Tight	☐ Closed Tight		Opened Fully Y ☐ N ☐	☐ Closed Tight	☐	☐
Pass	☐ Leaked	☐ Leaked	☐ Did Not Open	☐ Check Held at PSID	☐ Leaked	☐	☐
Fail				☐ Leaked			
REPAIR	☐ CLEANED REPLACED	☐ CLEANED REPLACED	☐ CLEANED REPLACED	☐ CLEANED REPLACED	CLEANED REPLACED	☐	☐
	☐ Disc	☐ Disc	☐ Disc	☐ Air Inlet Disc	☐ REPAIR	☐	☐
	☐ Spring	☐ Spring	☐ Spring	☐ Airl Inlet Spring			
	☐ Guide	☐ Guide	☐ Diaphragm	☐ Check Disc			
	☐ Seat	☐ Seat	☐ Seat	☐ Check Spring			
	☐ O-Ring(s)	☐ O-Ring(s)	☐ O-Ring(s)	☐ Float			
	☐ Module	☐ Module	☐ Module	☐ Diaphragm			
	☐ Rubber Kit	☐ Rubber Kit	☐ Rubber Kit	☐ Rubber Kit			
	☐	☐	☐	☐	☐ Other	☐	☐
	Other/Notes:						
Final Test	PSID	PSID	☐ Opened at	Opened Fully Y ☐ N ☐	Closed Tight	☐	☐
	☐ Closed Tight	☐ Closed Tight	PSID	Air Inlet PSID			
				CK Valve PSID	Pass ☐		

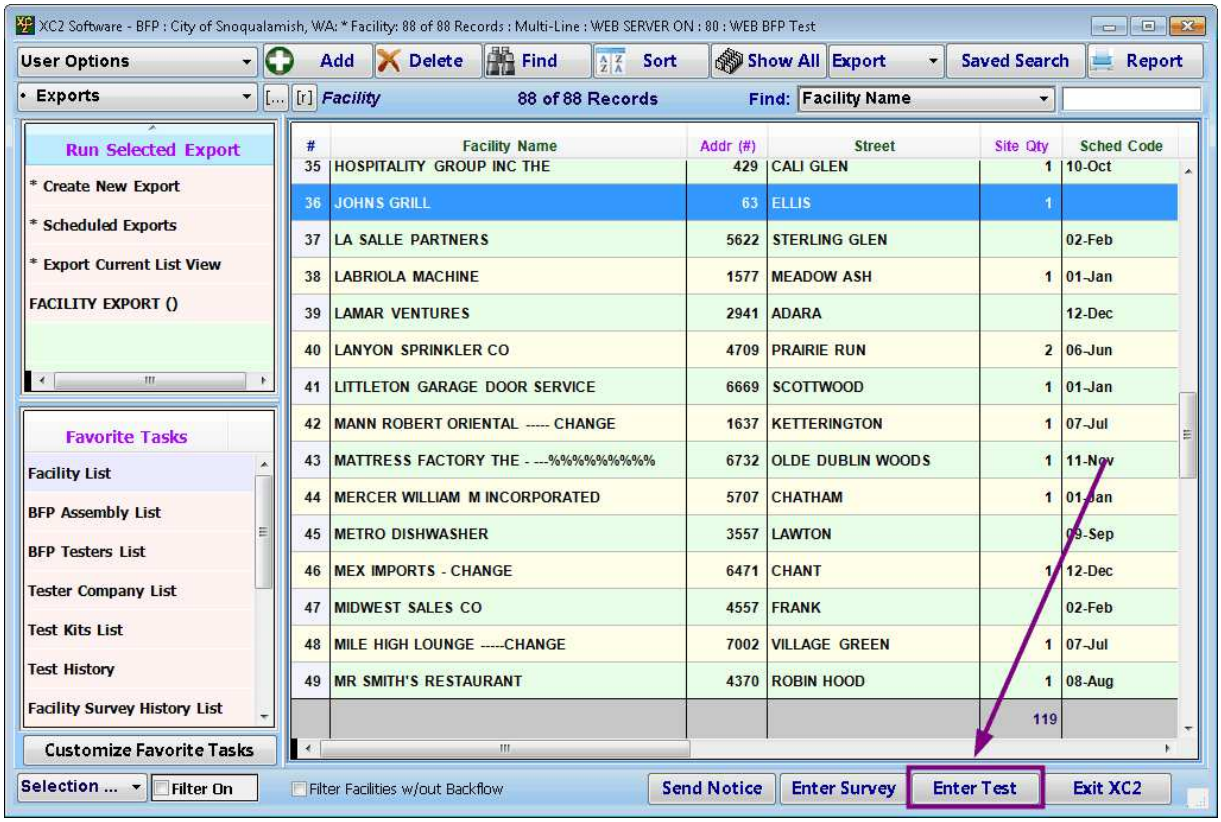
THE ABOVE REPORT IS CERTIFIED TO BE TRUE: 1A

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.

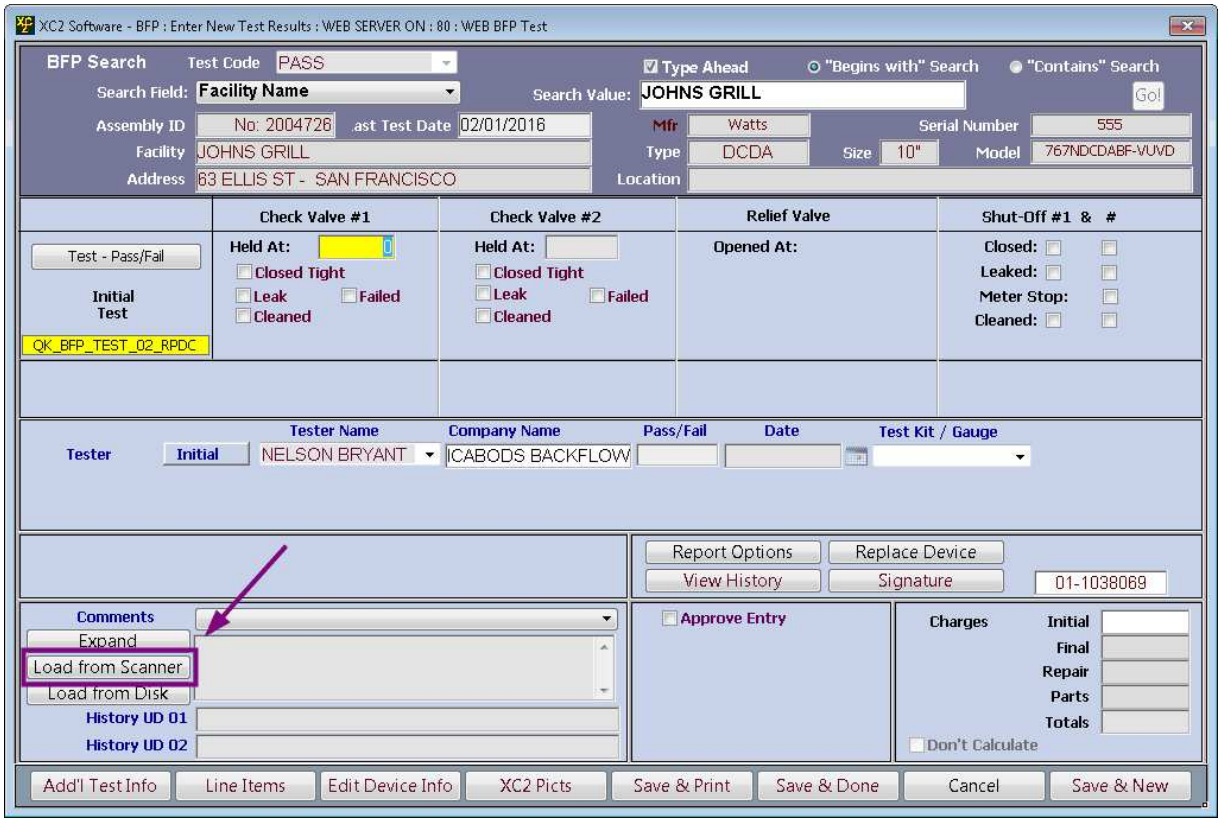


Notes:

Load from scanner

On the test entry screen click

Load from Scanner

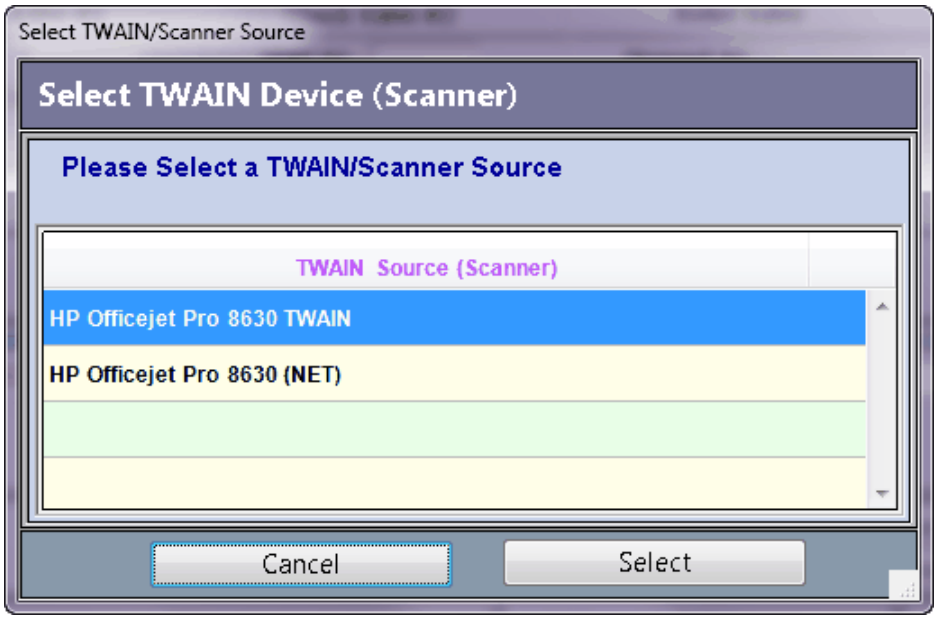


Notes:

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.



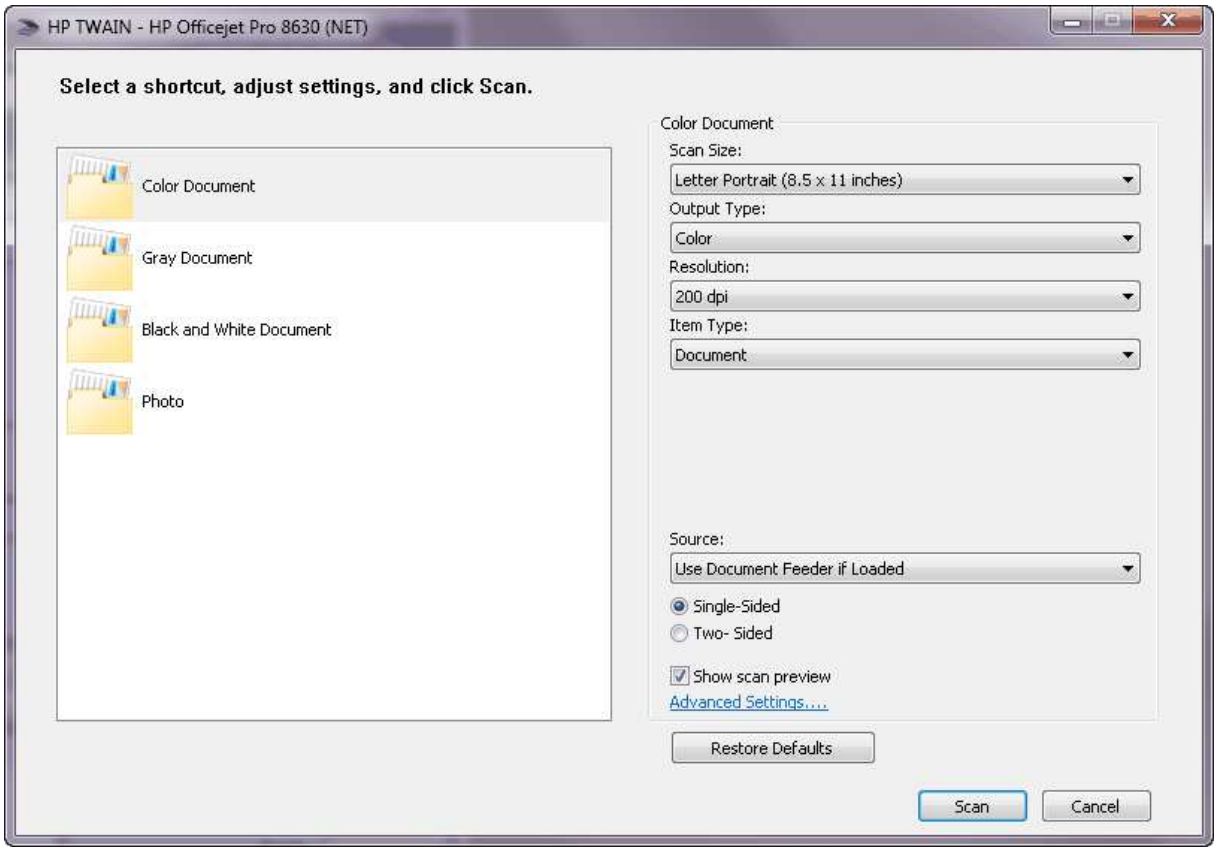
Notes:

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.

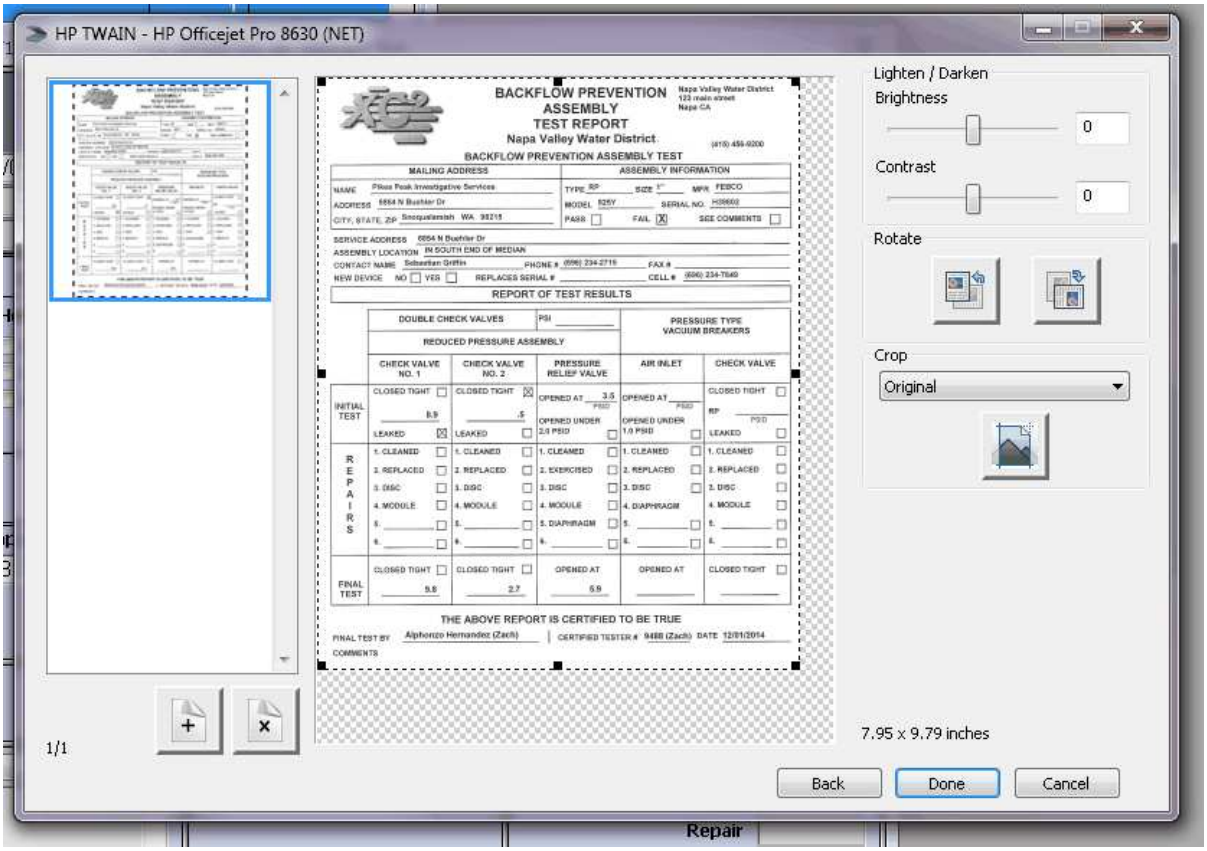


Notes:

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.

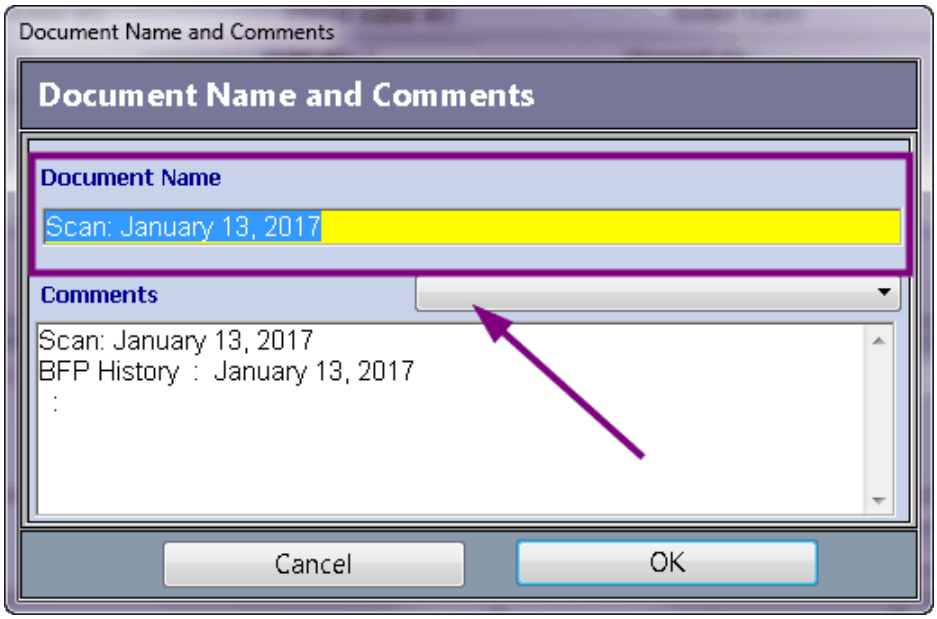


Notes:

Name Your Document

Give your document a name.

You can also write any comments that you like.

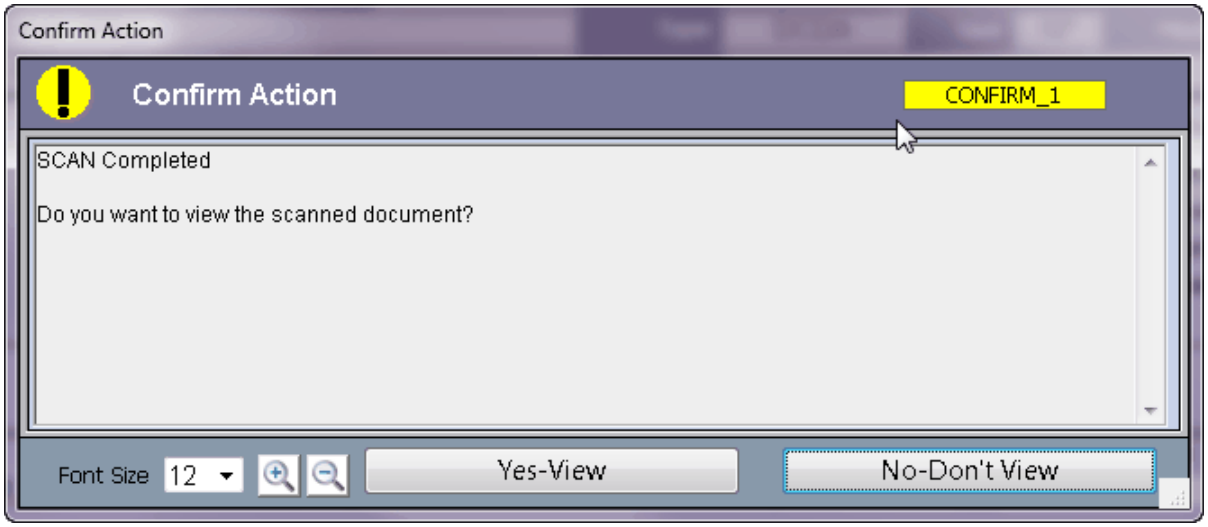


Notes:

View Document

You can choose to view your document

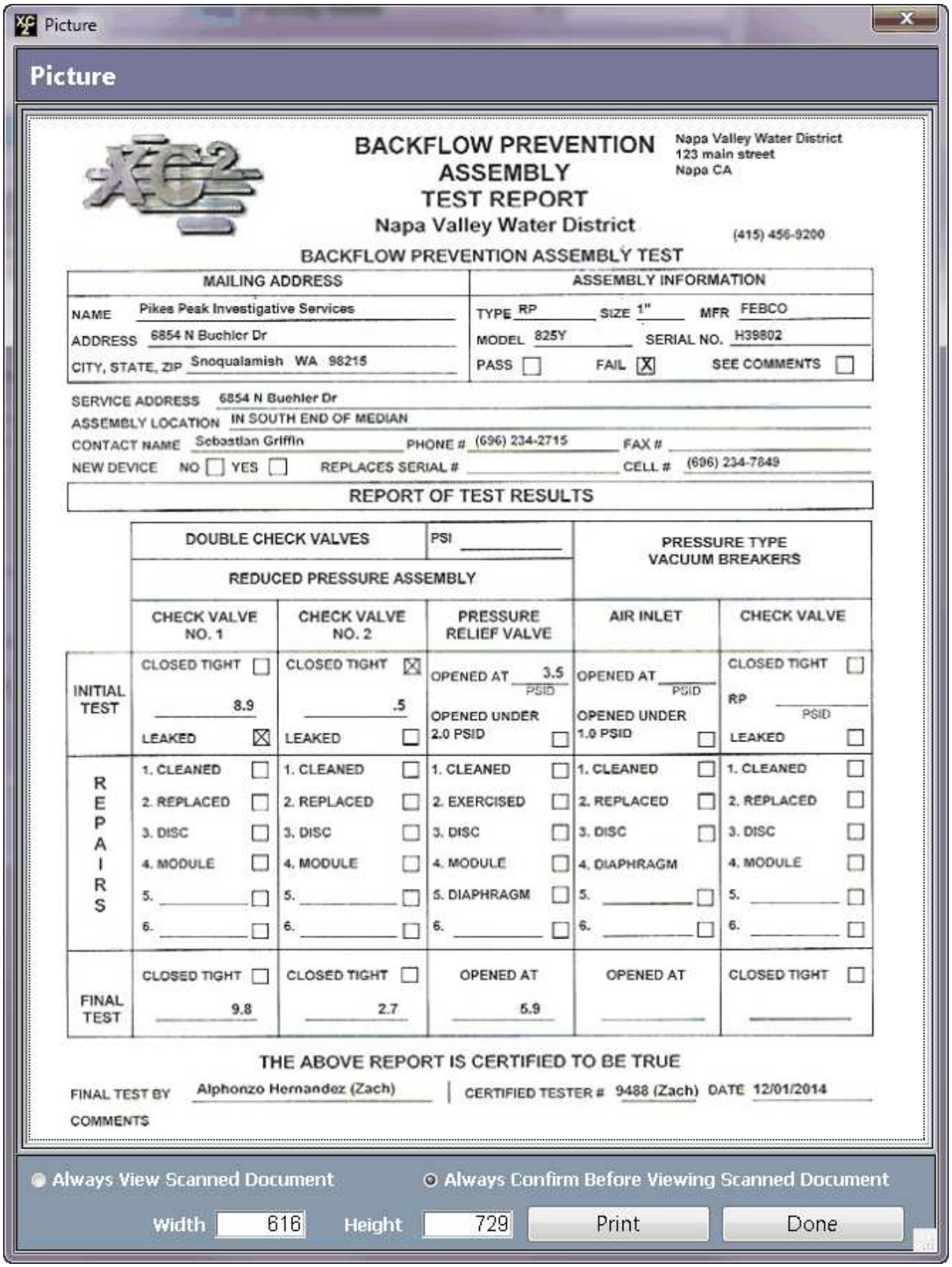
Click Yes-View or No-Don't View



Notes:

View Scan

Here you can view your scan, print a hard copy or you may just close the screen.



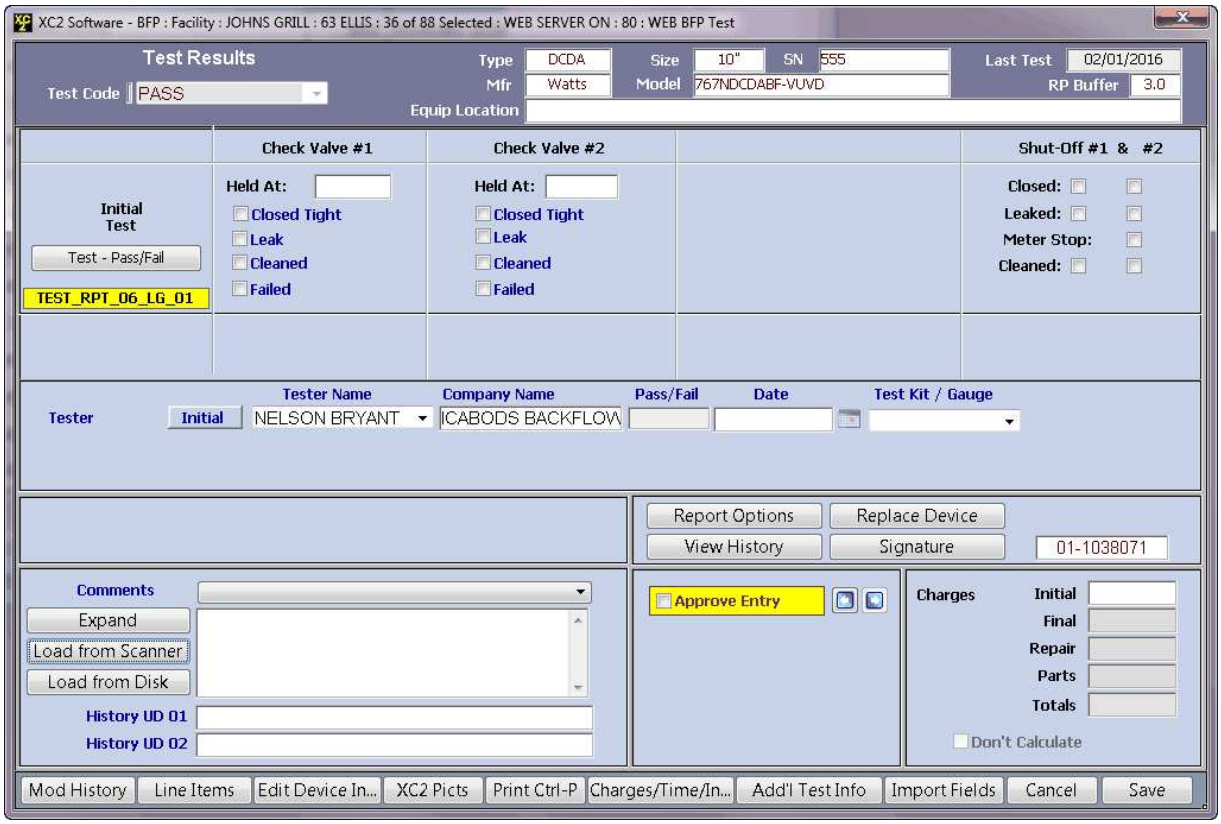
Notes:

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.

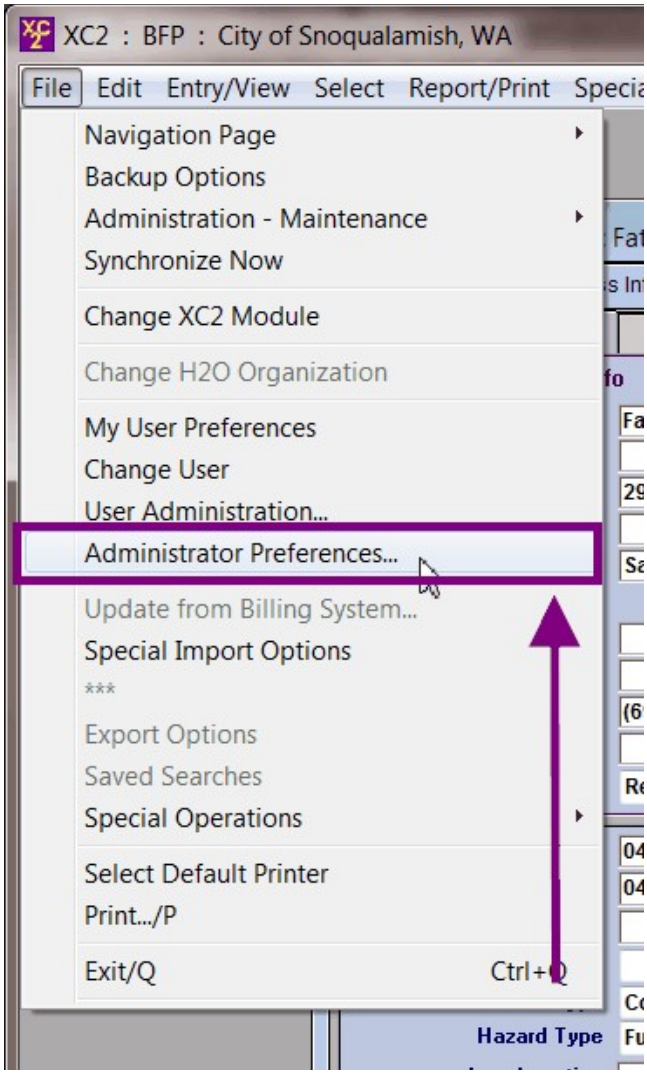
Note

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

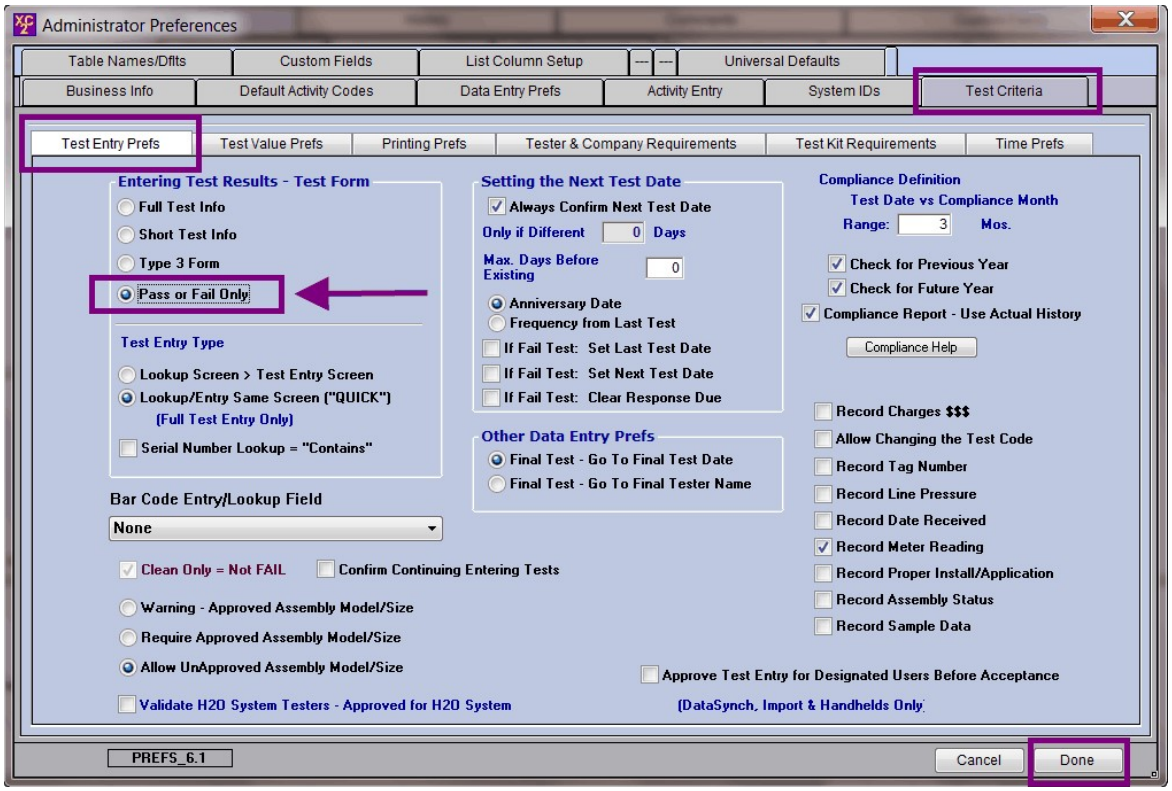


Select Test Criteria tab

Test Entry Prefs tab

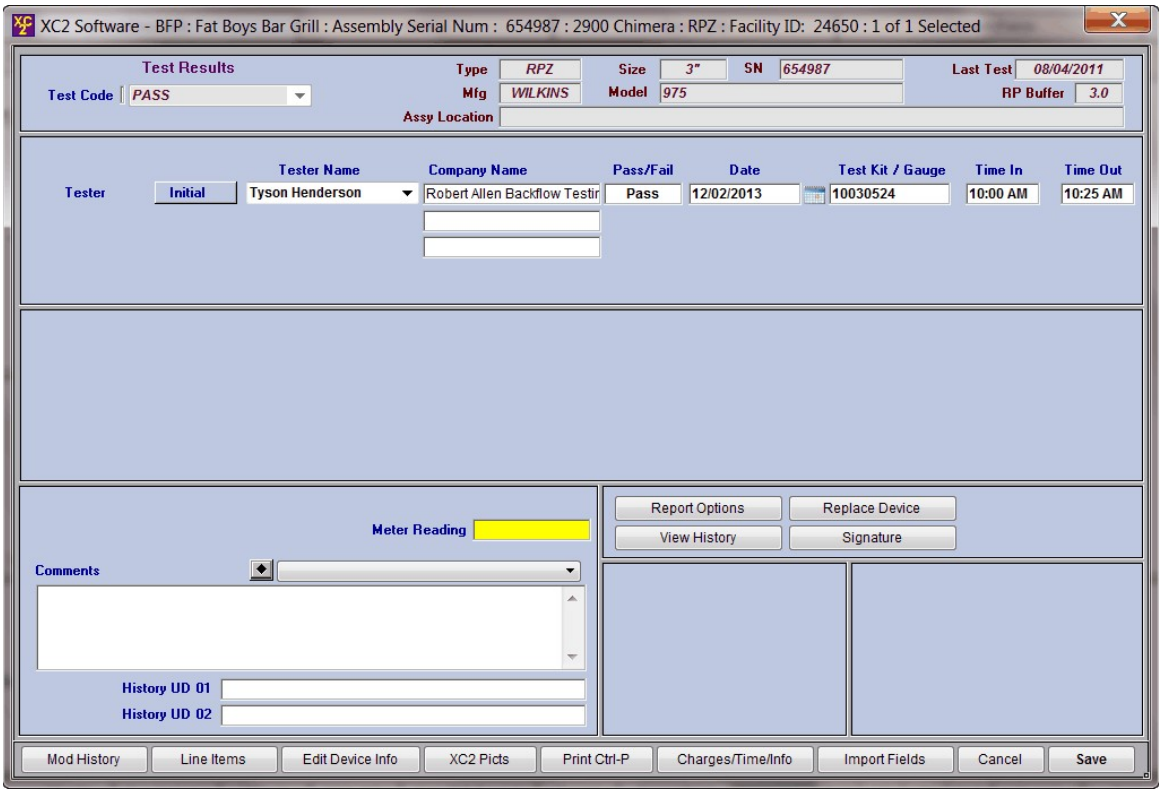
Select Pass or Fail Only

Click Done



Notes:

Now when you enter tests, you will only have the option to choose Pass or Fail when entering test results



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

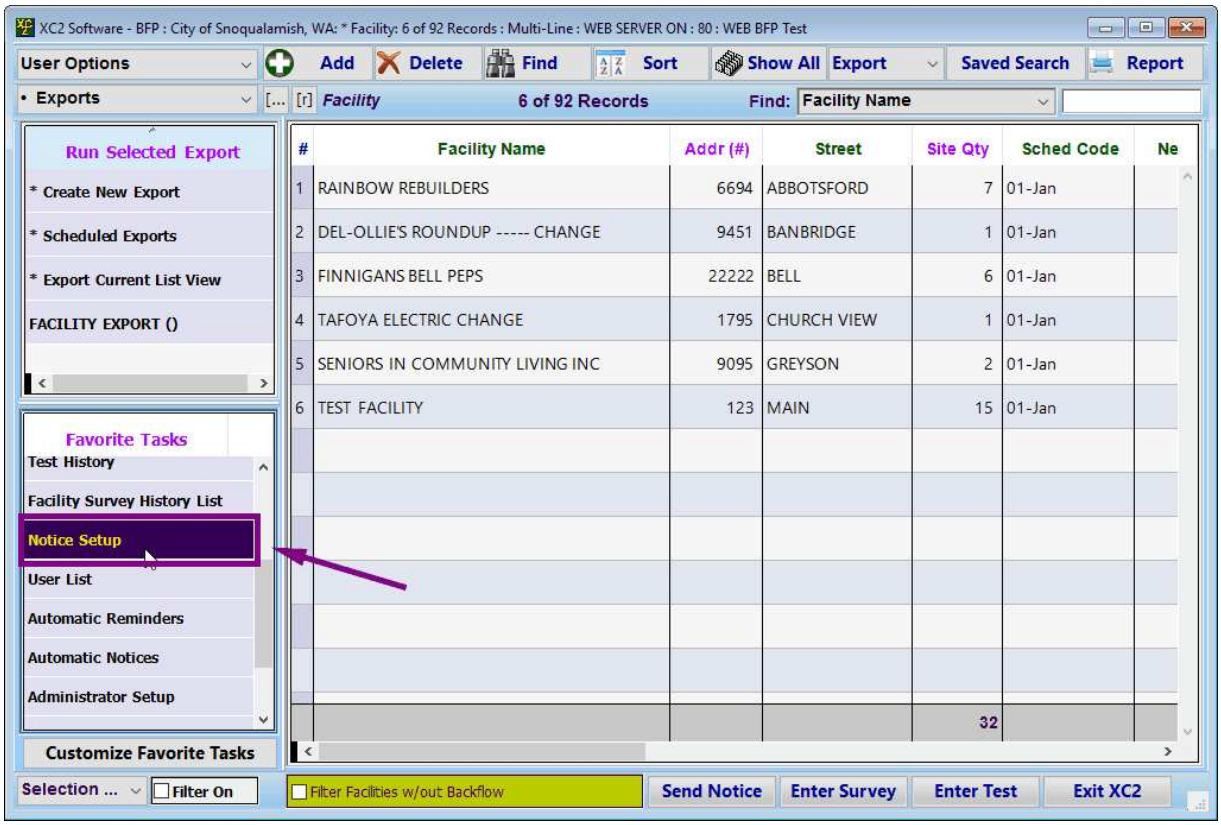
KB Asset ID: 3613

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

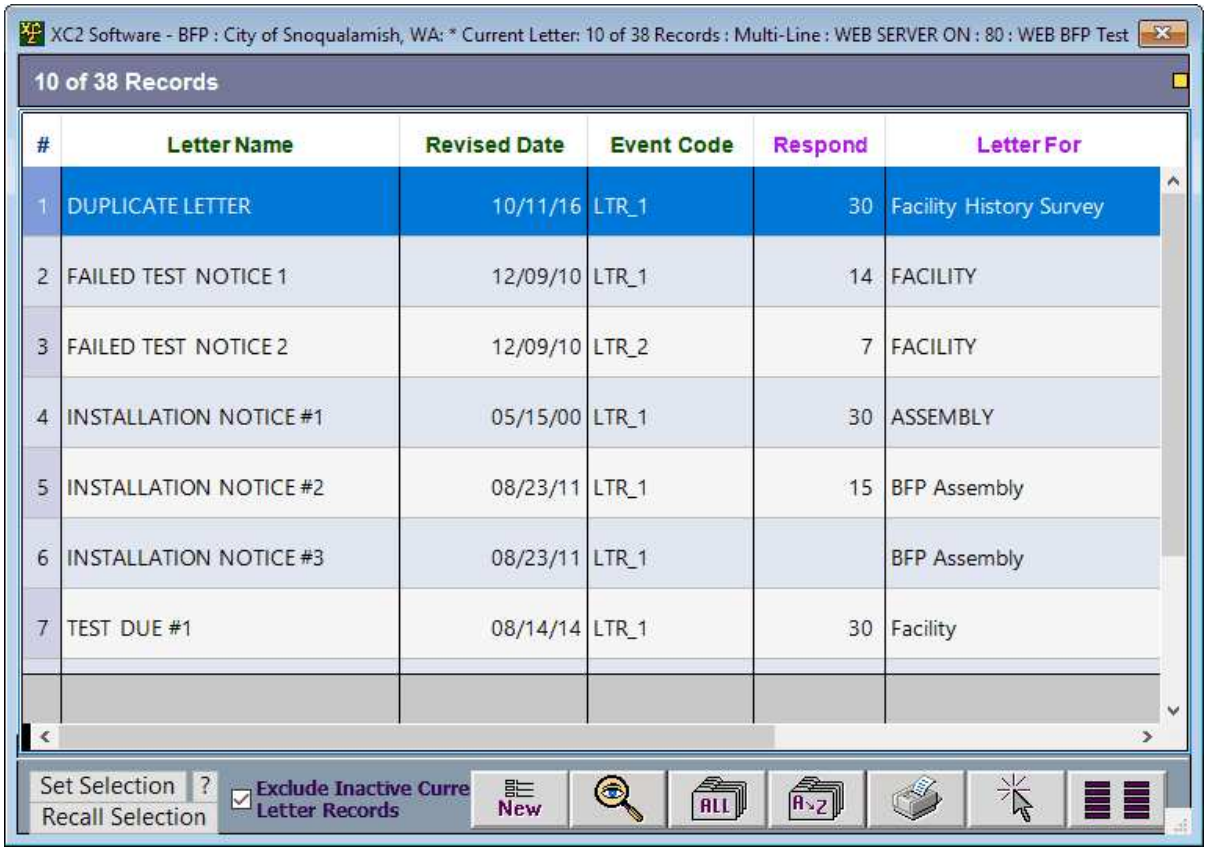


Notes:

List of Current Letters

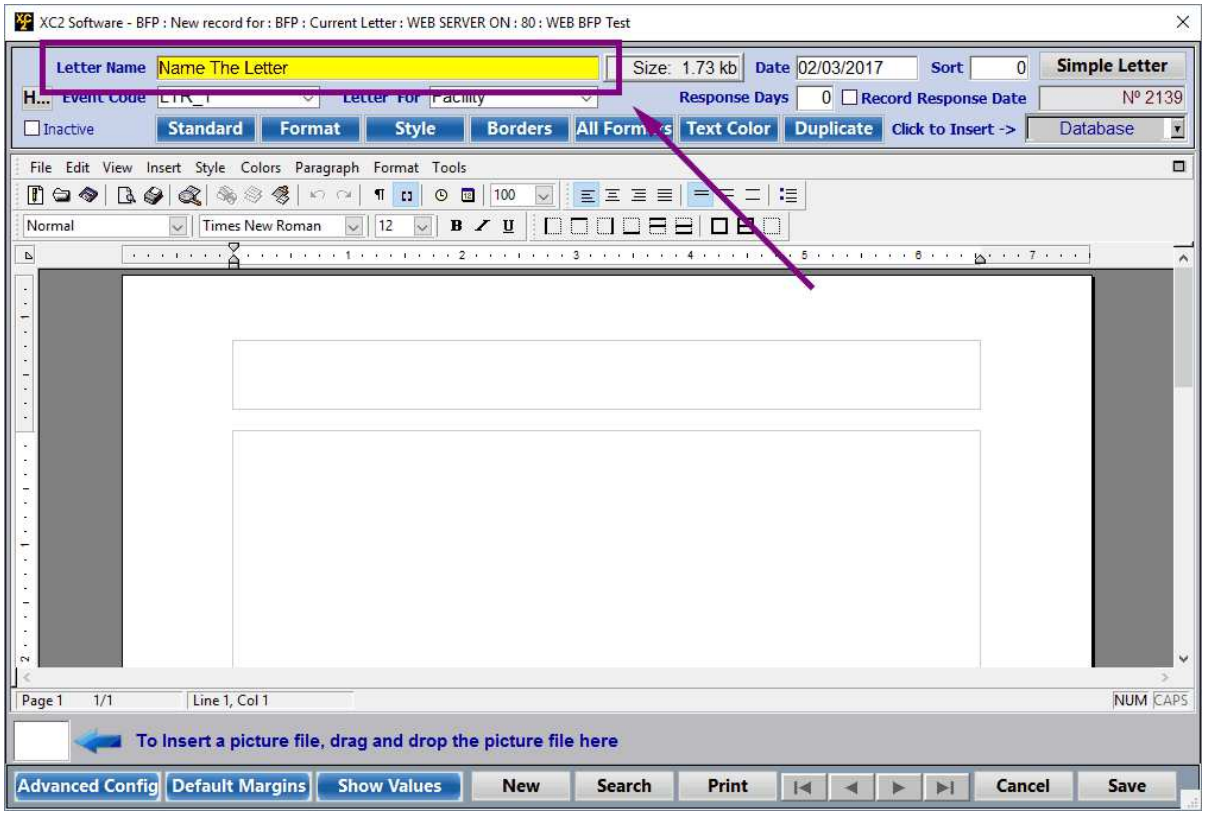
You can edit a letter by double clicking on the record.

To create a new notice click New



Notes:

Name Your Letter



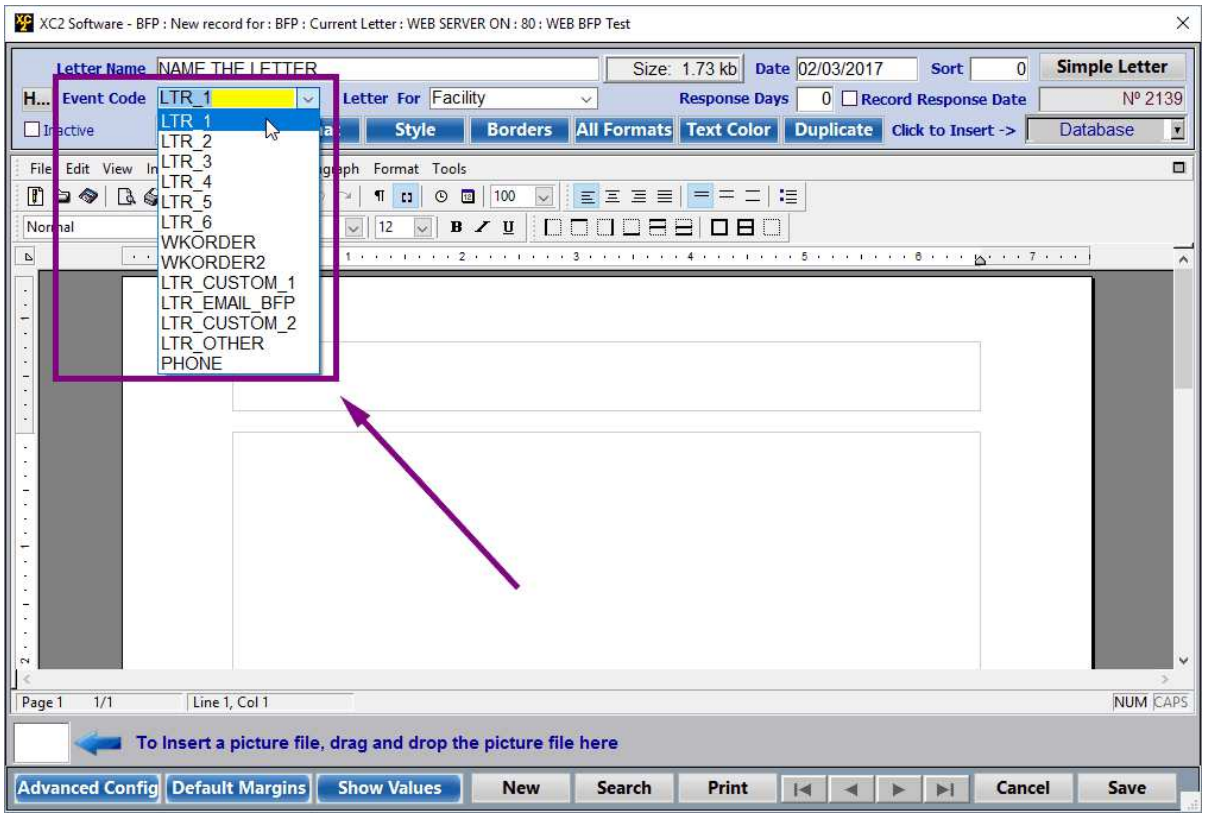
Notes:

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

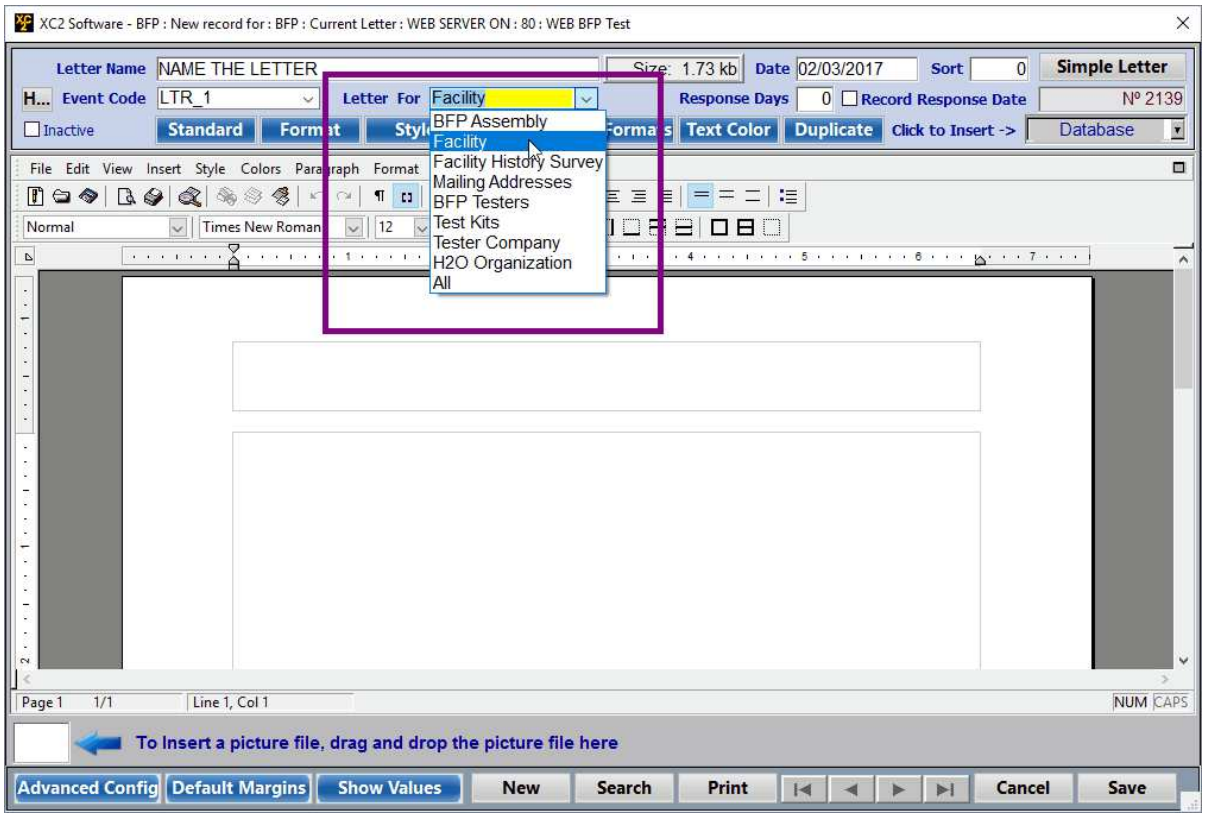


Notes:

Letter For

From what list of records will this leter be sent

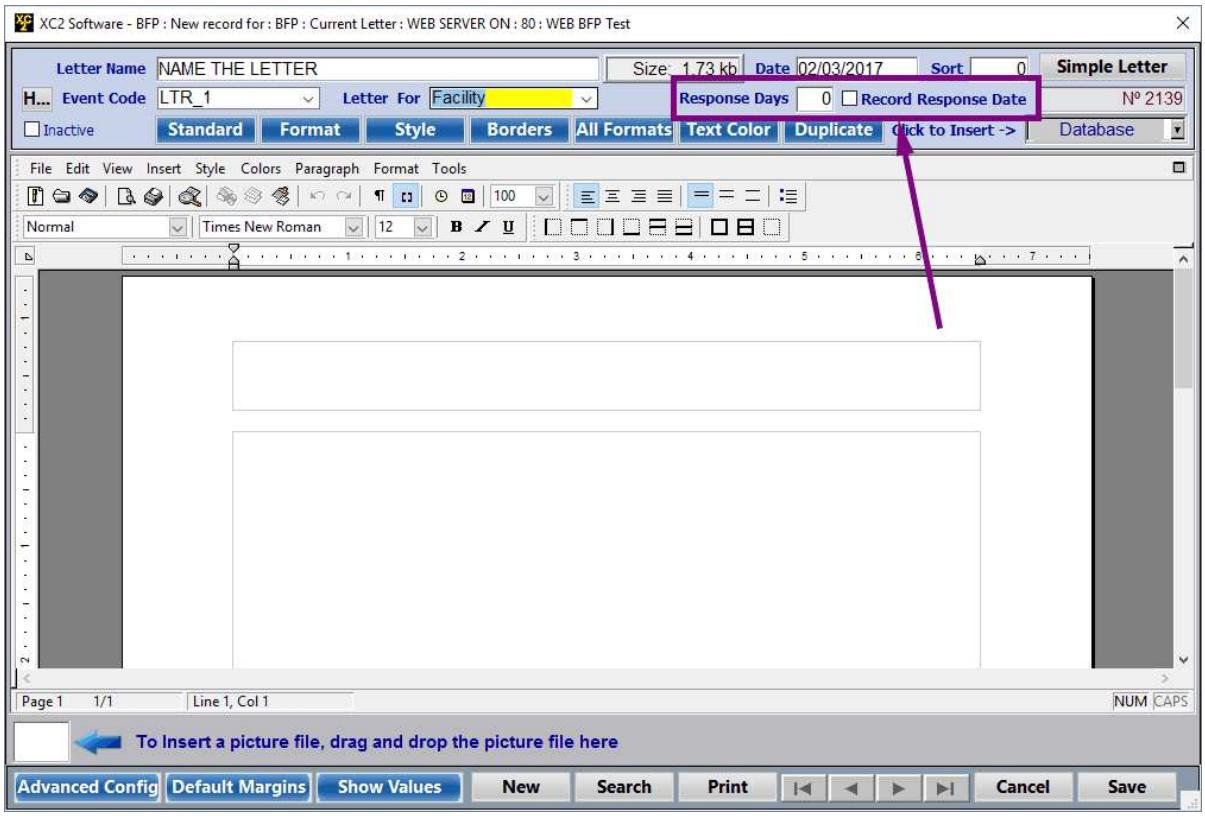
Note: Most Test due notices will be sent from a list of Facility Records



Notes:

Response Date

How much time will you give them to respond?

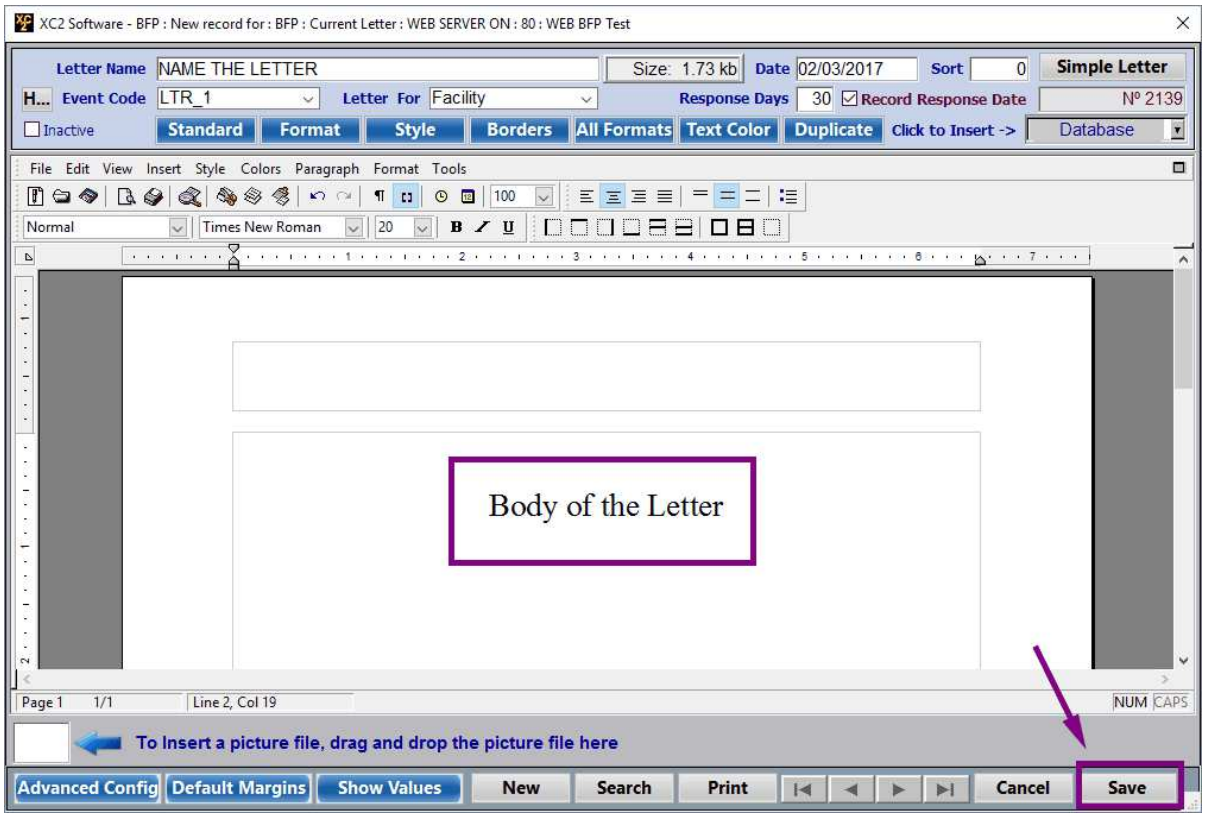


Notes:

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

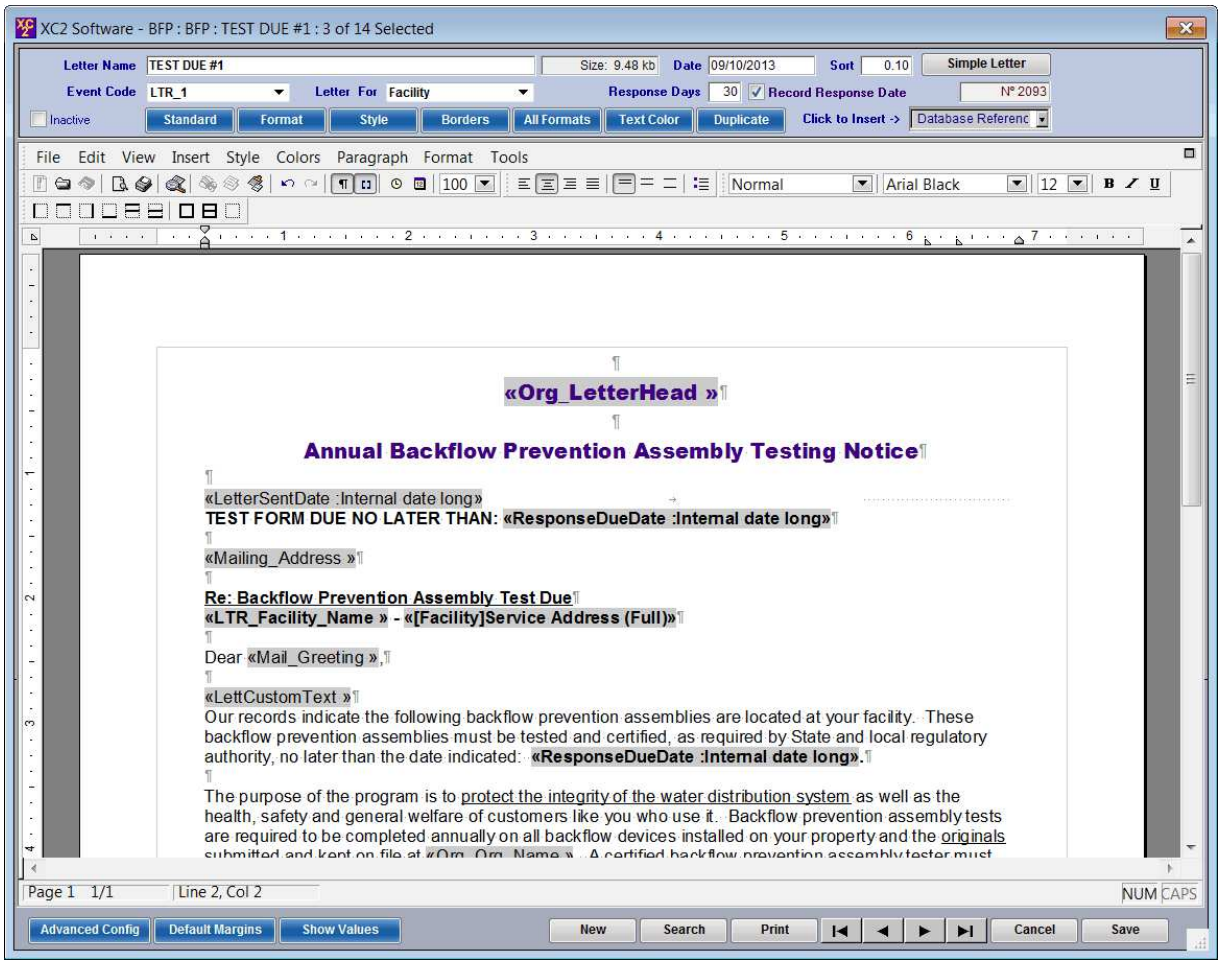
This page describes how to add a Merge Field to a Letter, where they can be found, and how to use them.

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



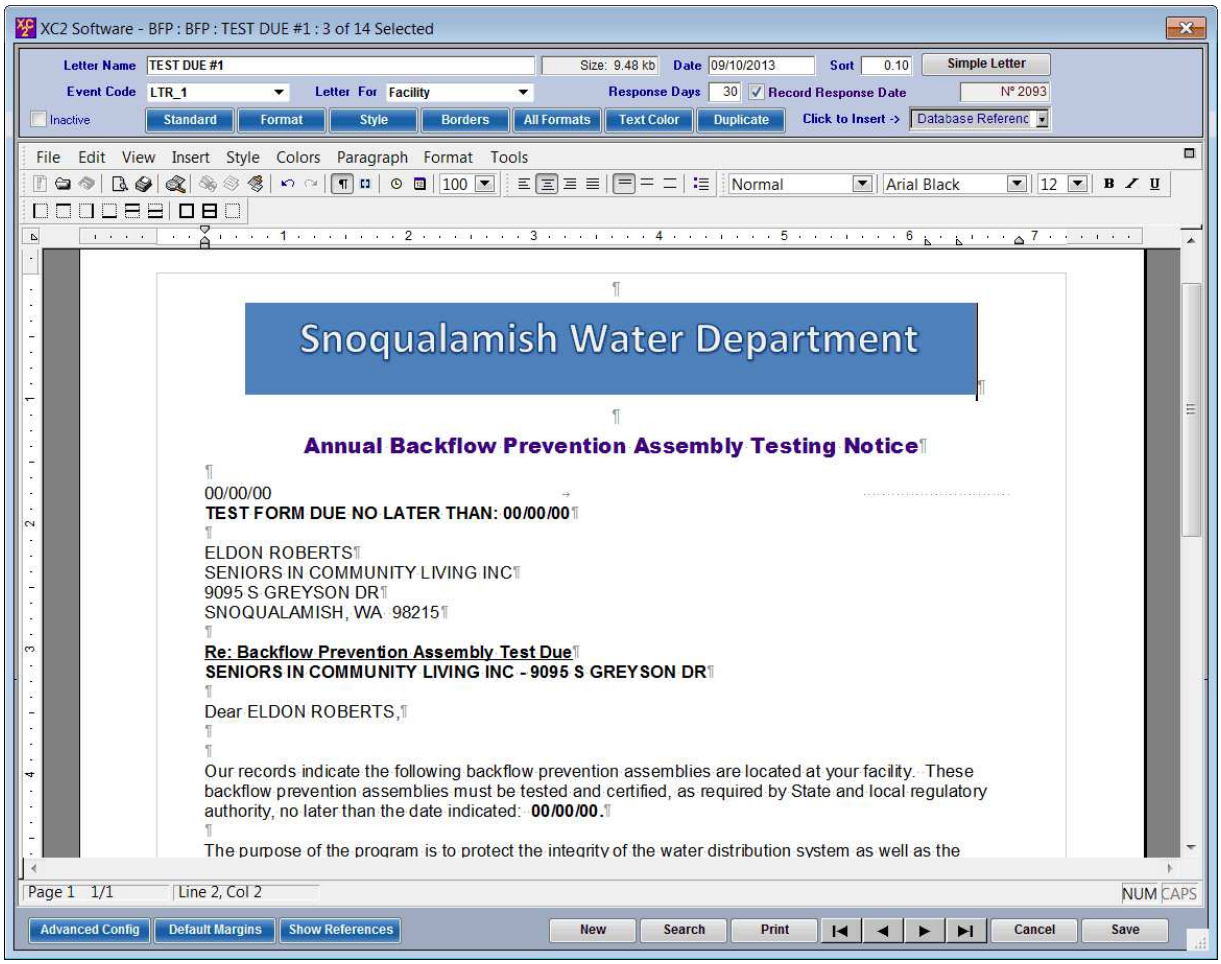
Notes:

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.

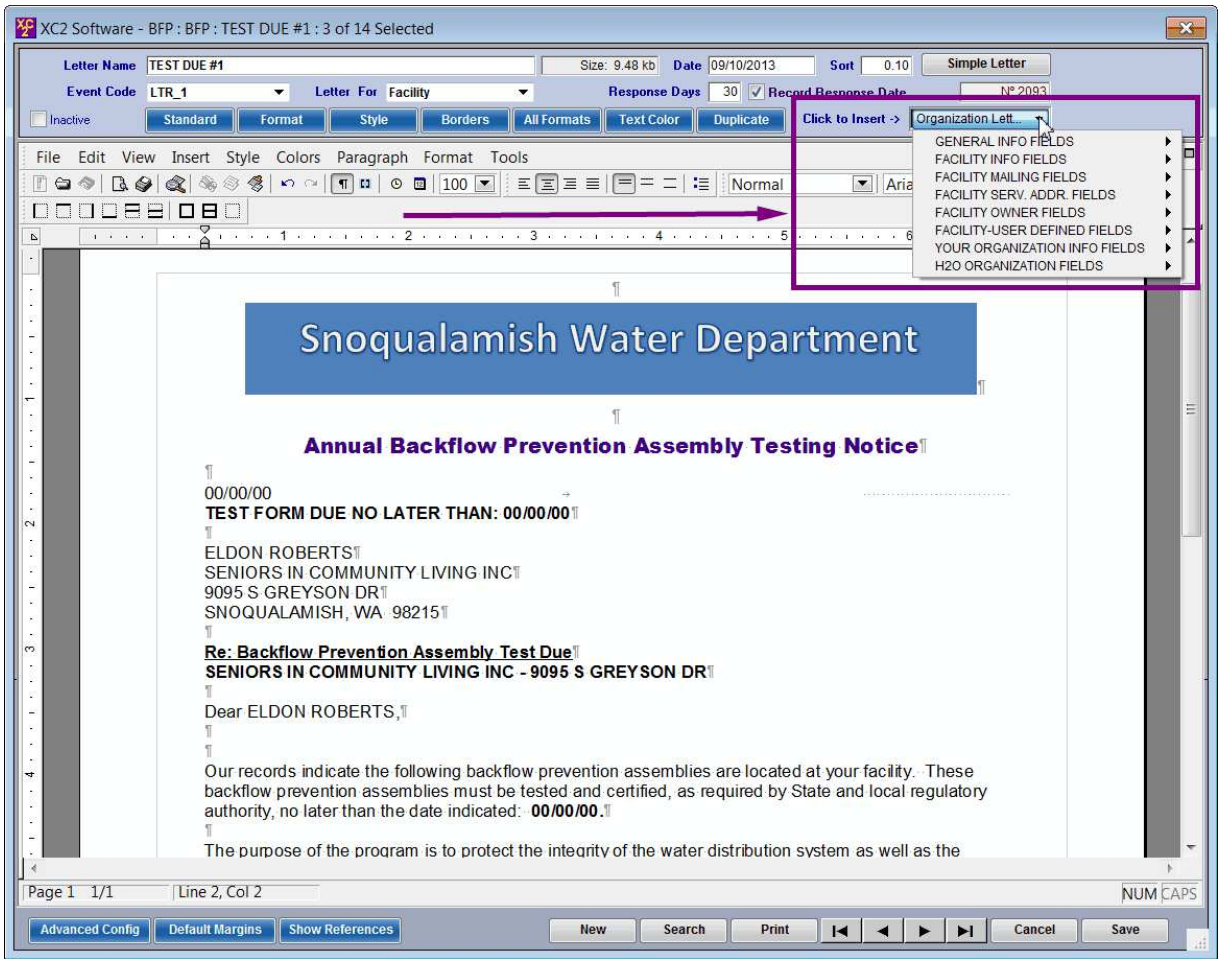
Below is the same letter as above with Merge Field information imported by XC2.



Notes:

Where to Find Merge Fields

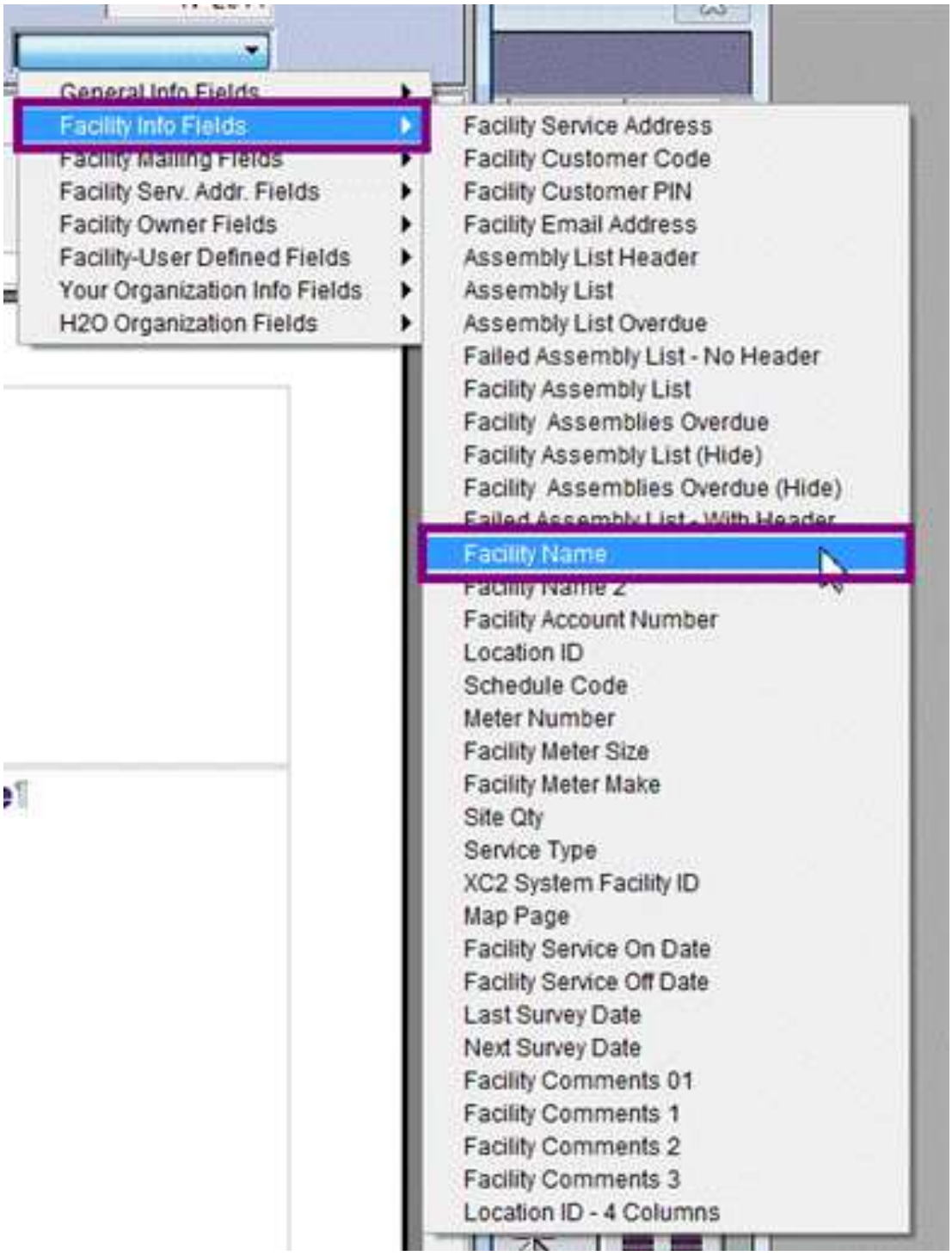
In the letter editor, click the pull-down menu "Click to Insert". All Merge Fields can be found here



Notes:

Choose Merge Field

Choose a category, than choose a Merge Field to add. Here under Facility Info Fields, I choose Facility Name



Notes:

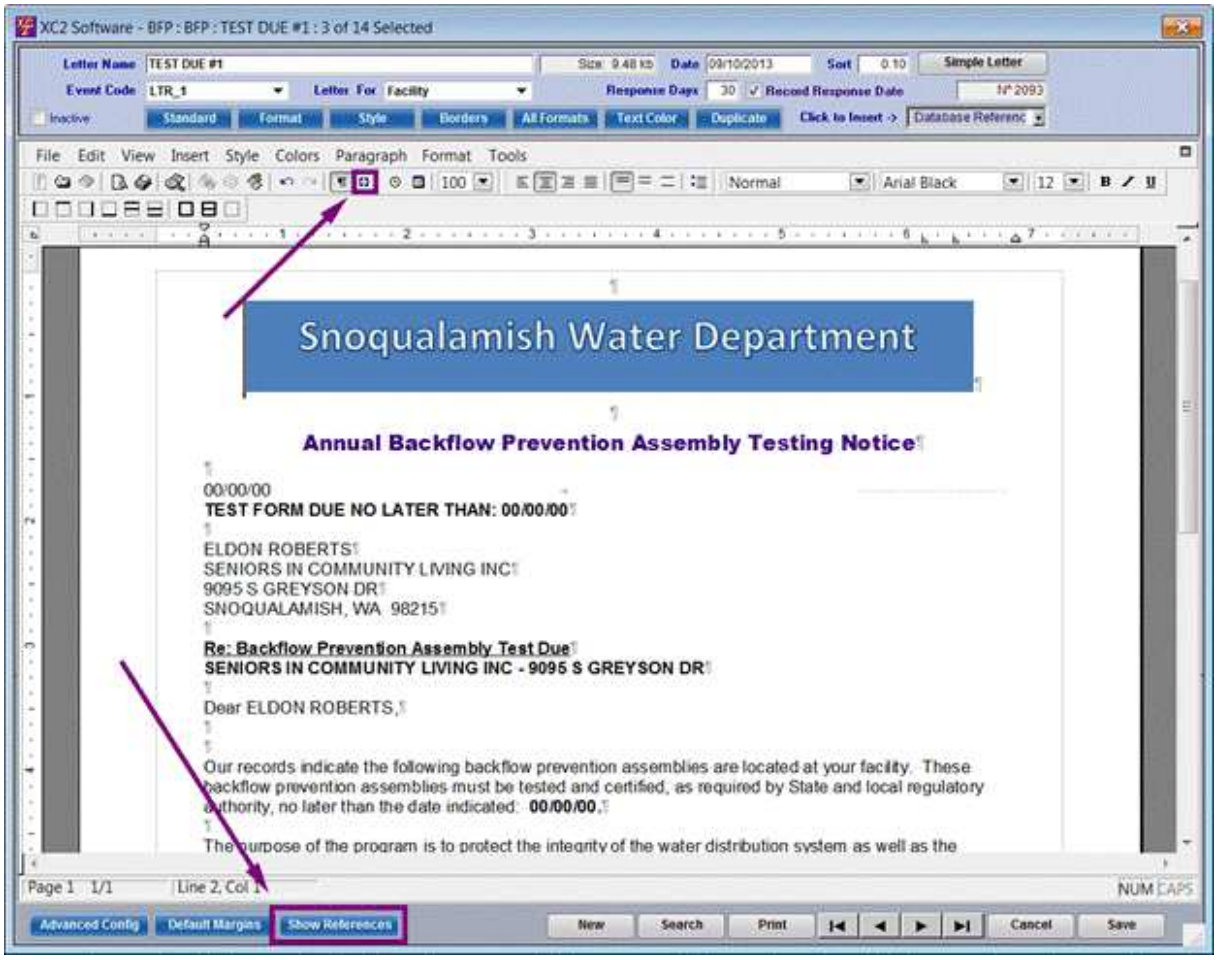
Preview Letter

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

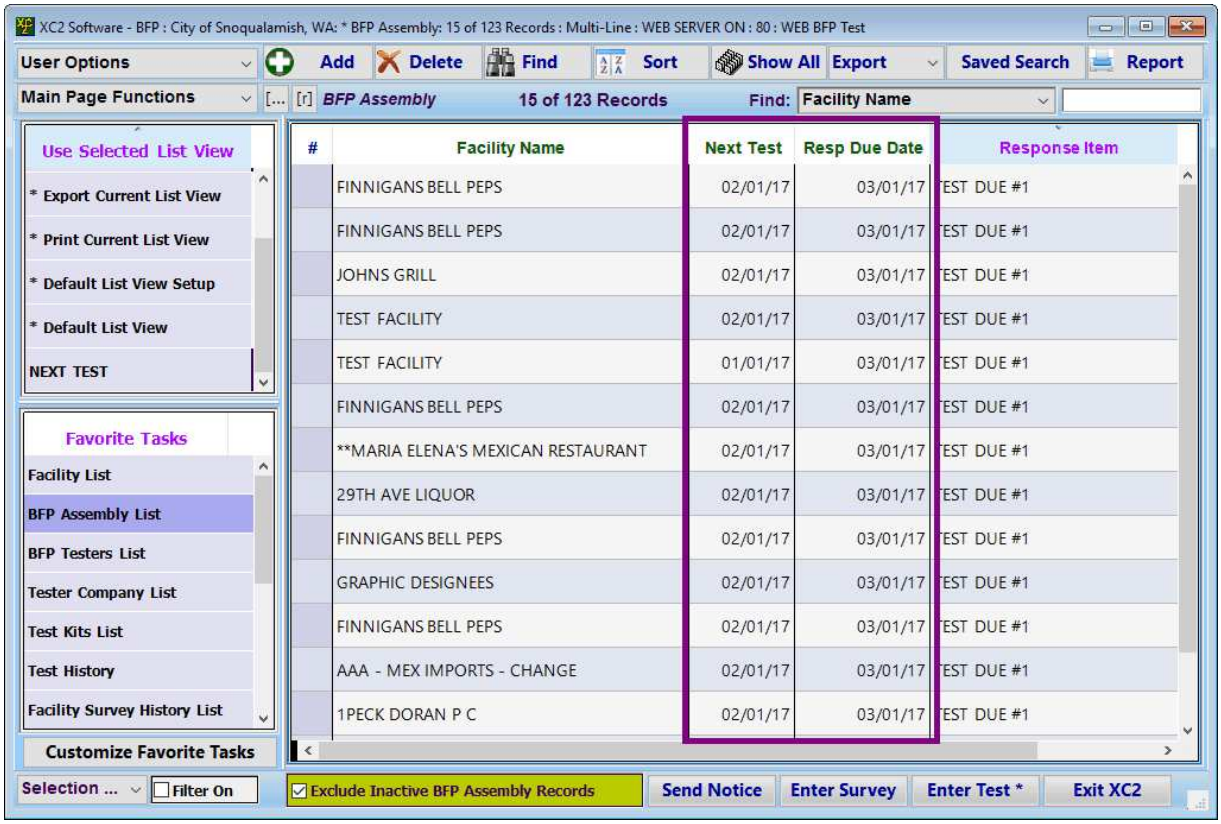
KB Asset ID: 3615

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.



#	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 DESIGNEES	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

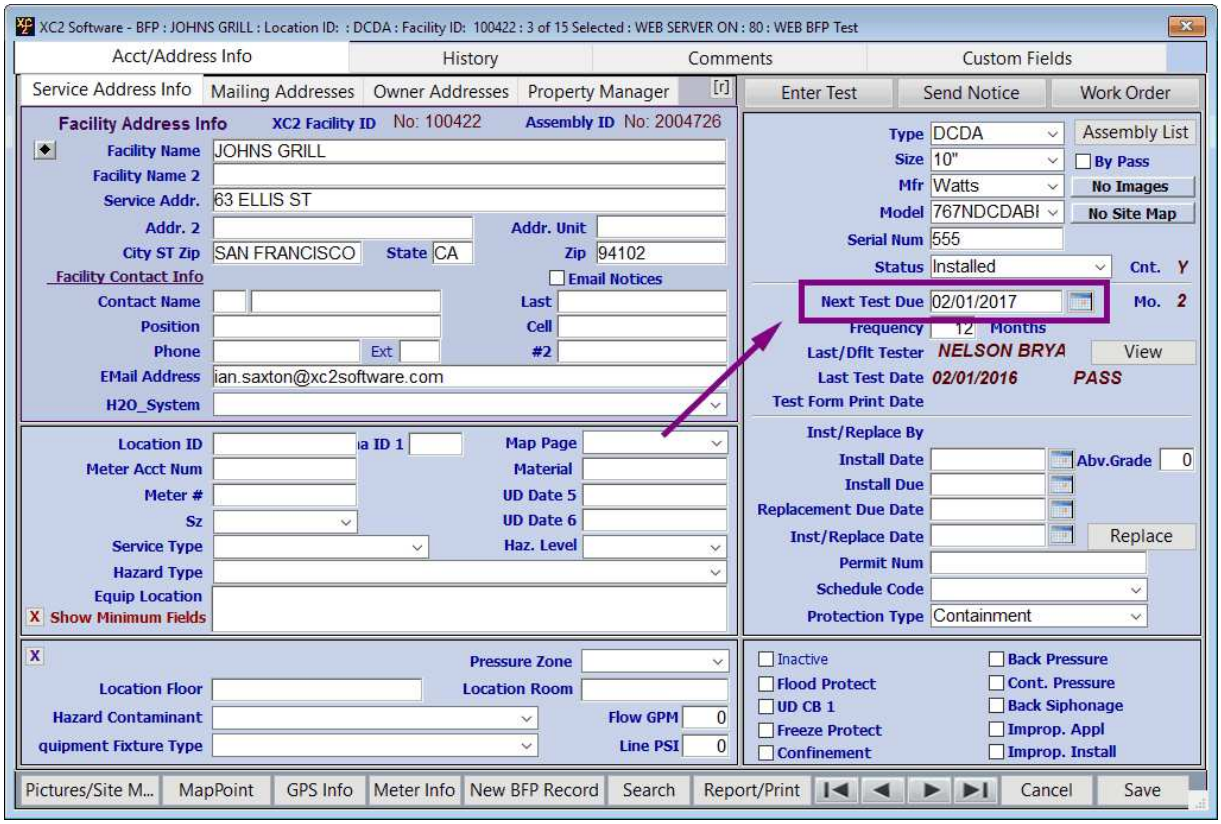
Notes:

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:

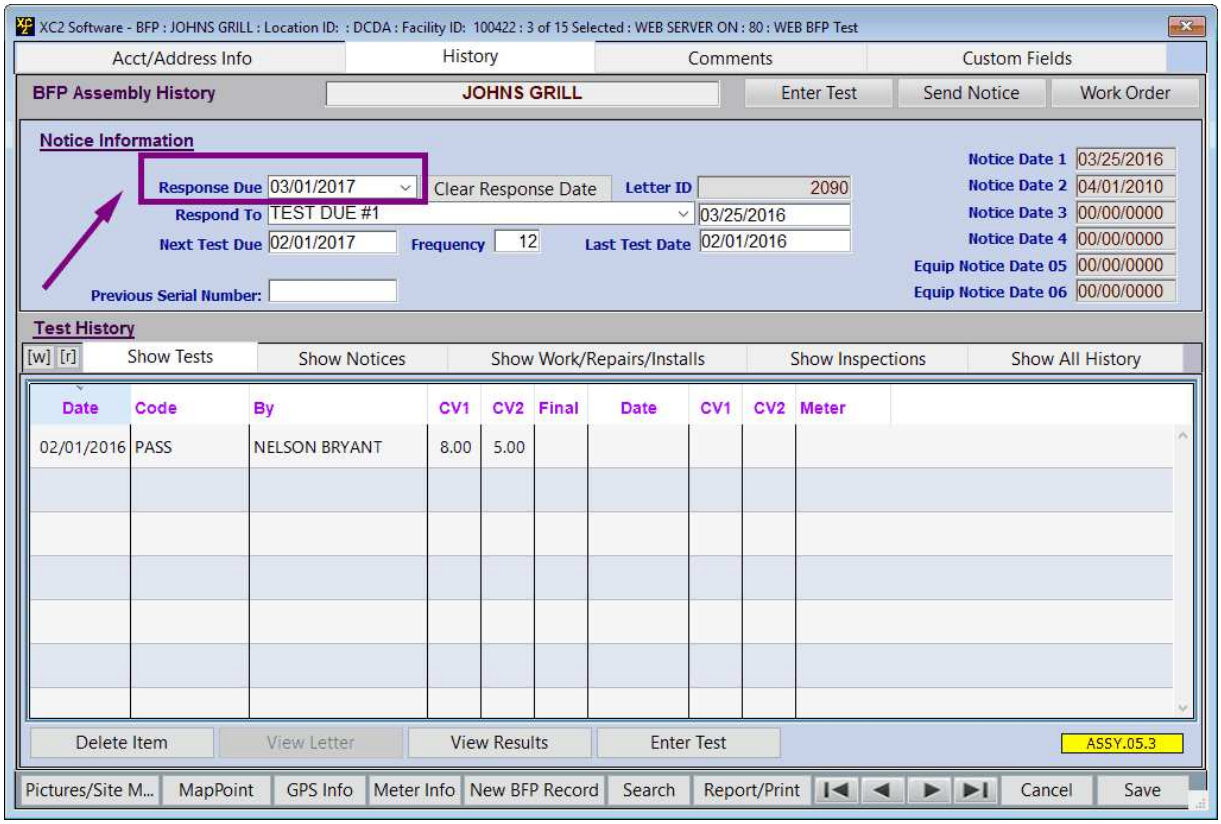
What is the Response Date?

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.



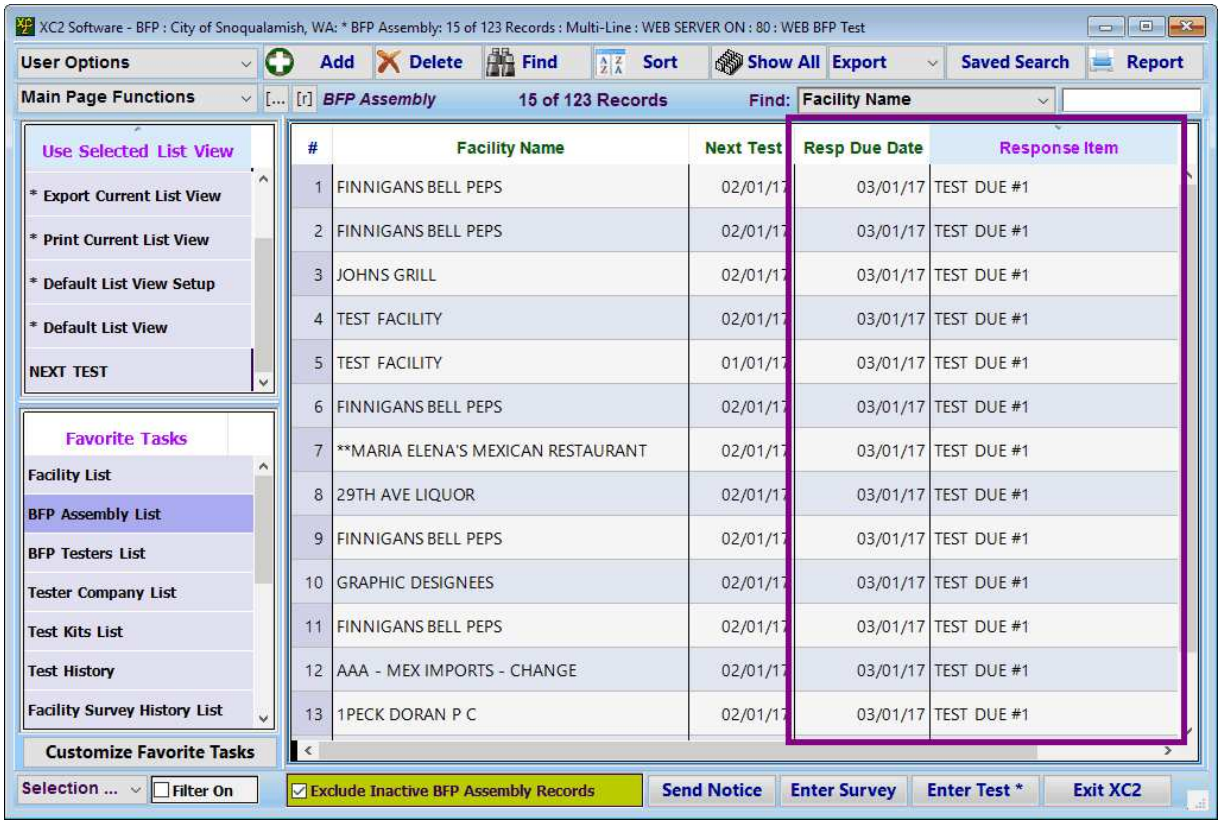
Notes:

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 responce due date will be removed.



Notes:

XC2 Software Knowledge Base

How to Set Up Automatic Notices

KB Asset ID: 2258

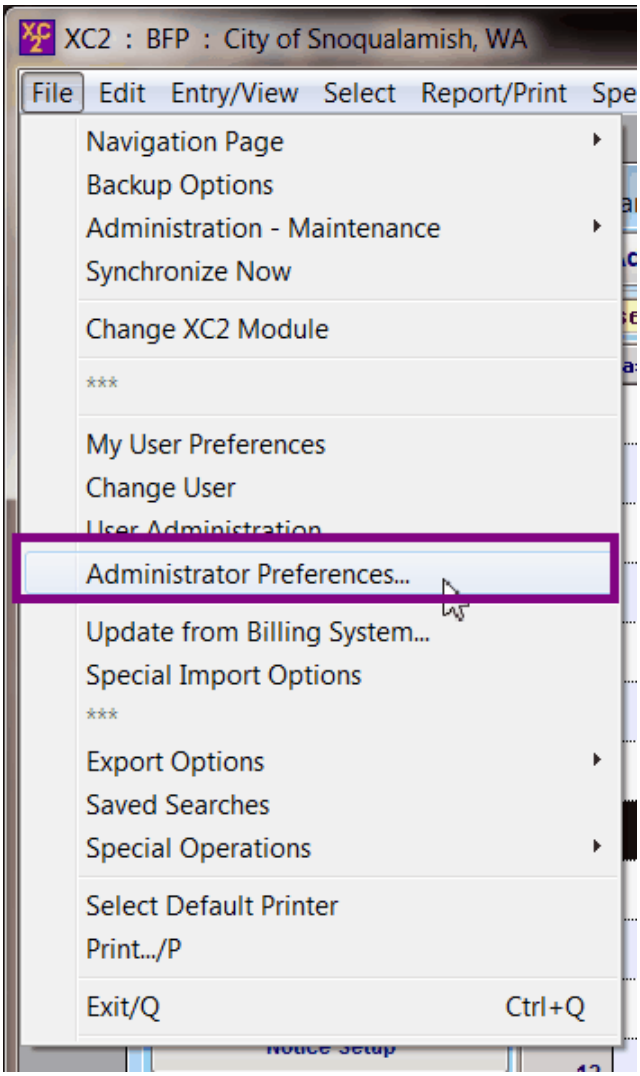
Part 2: Setting Up Automatic Notices

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



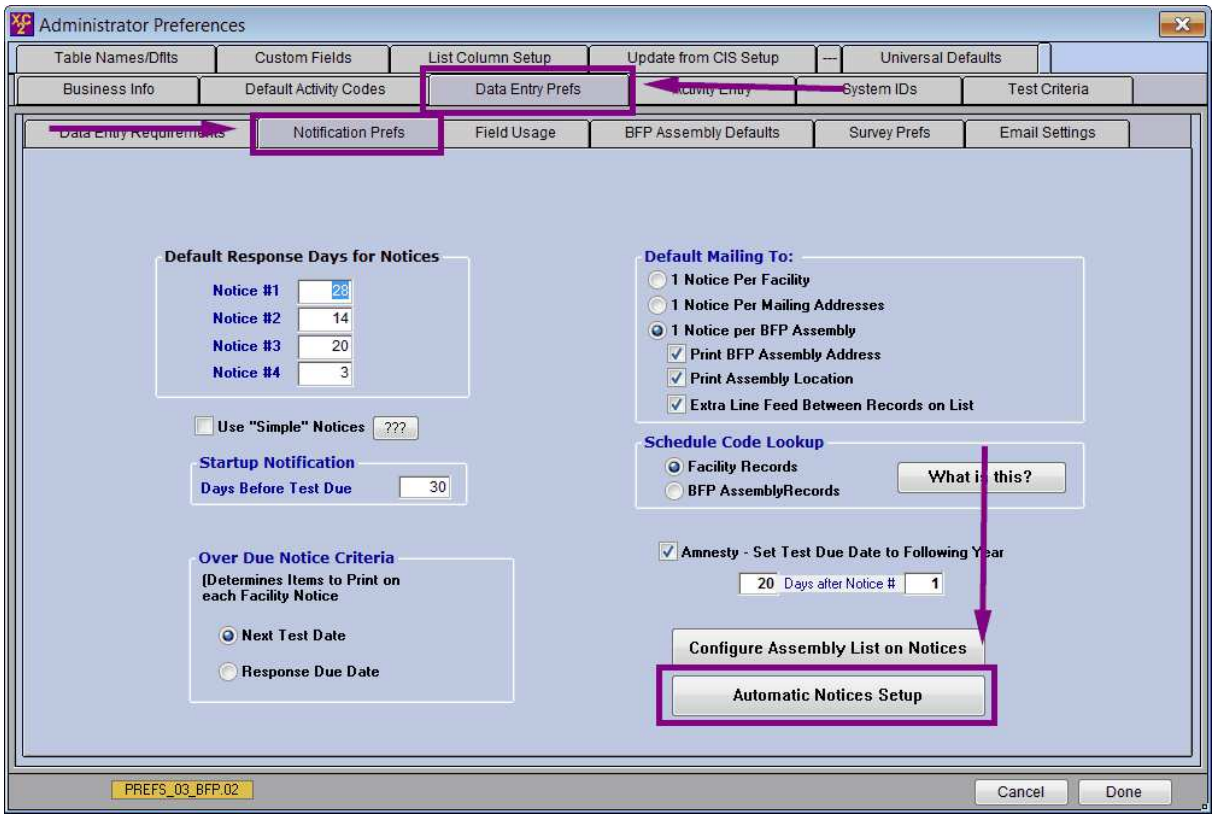
Notes:

Automatic Notices Setup

Select Data Entry Prefs Tab

Then select Notification Prefs Tab

Finally, click Automatic Notices Setup



Notes:

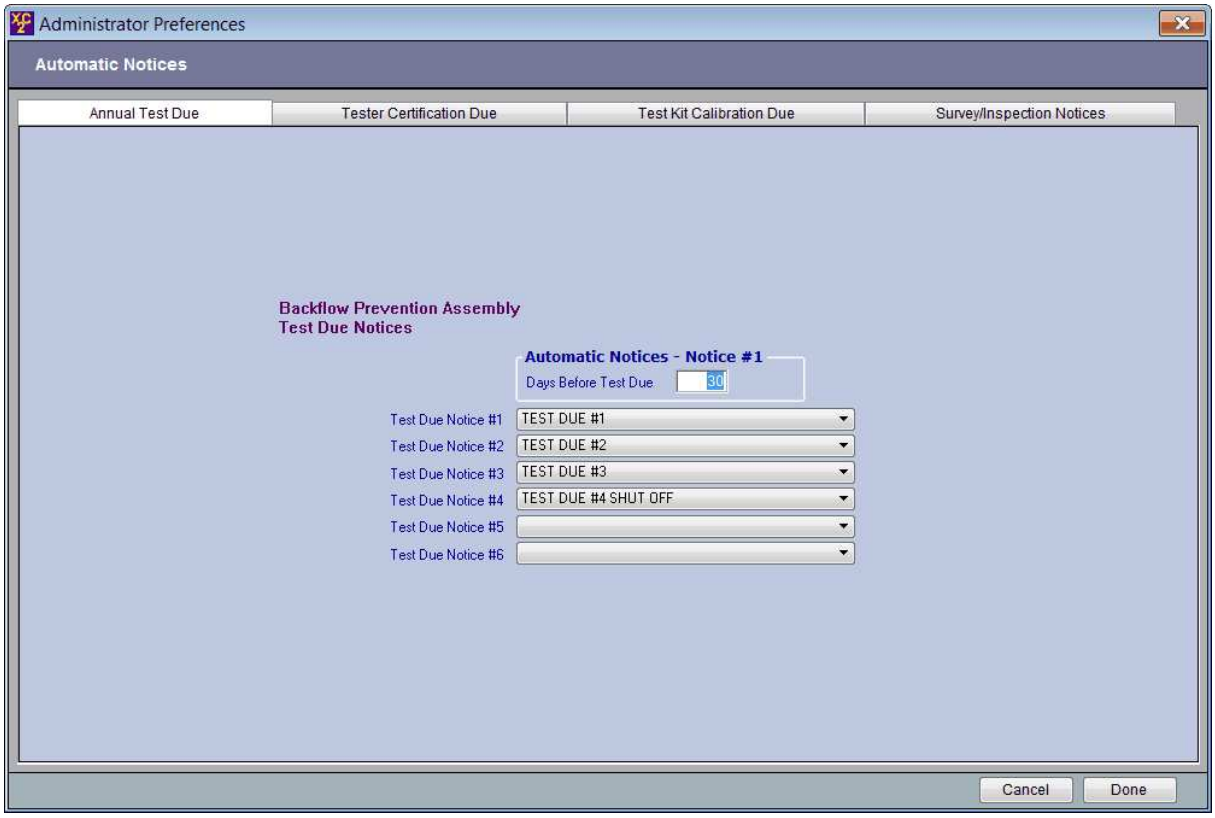
Choose Your Letters

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.

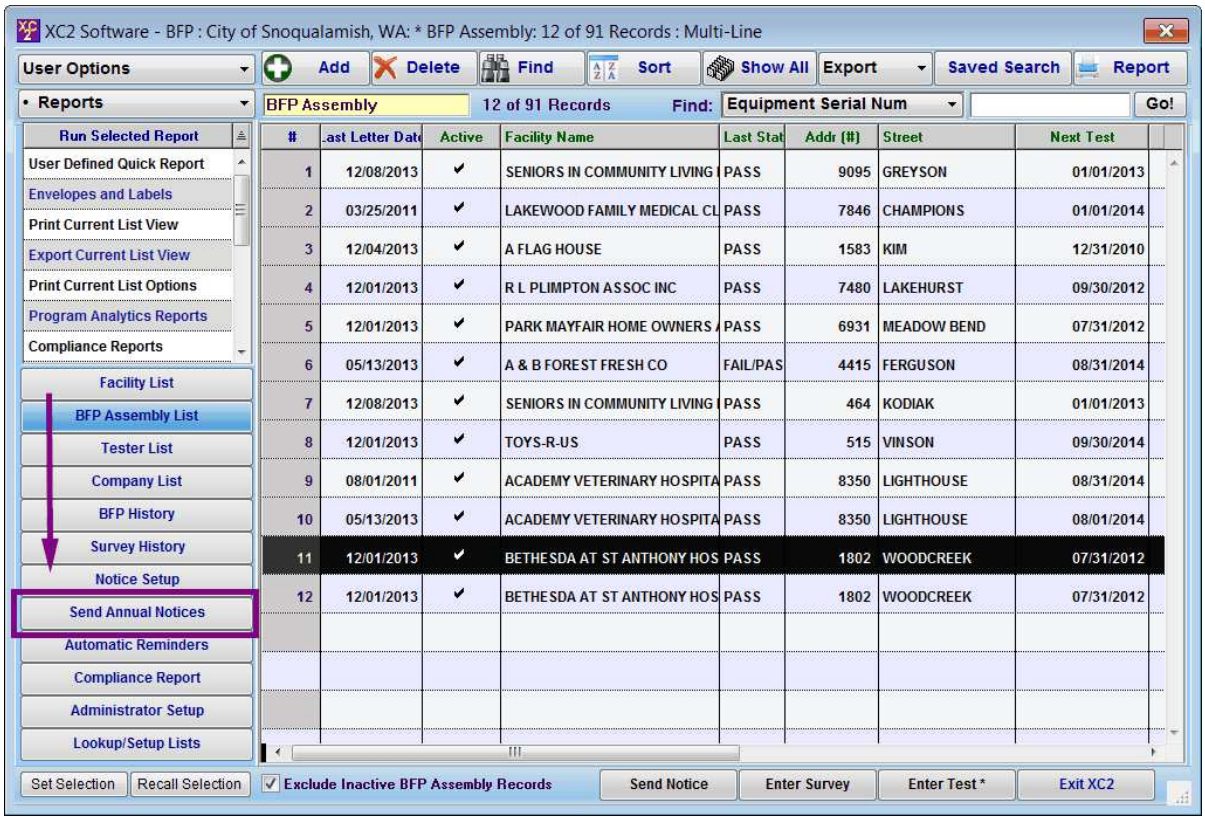


Notes:

Sending Notices

Now that Automatic Notices is set up, it is time to send Notices.

On the Main Page, select Send Annual Notices



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.

Notes:

XC2 Software Knowledge Base

Printing Notices: Manually

KB Asset ID: 3612

This page describes the process necessary to send notices manually out of XC2.

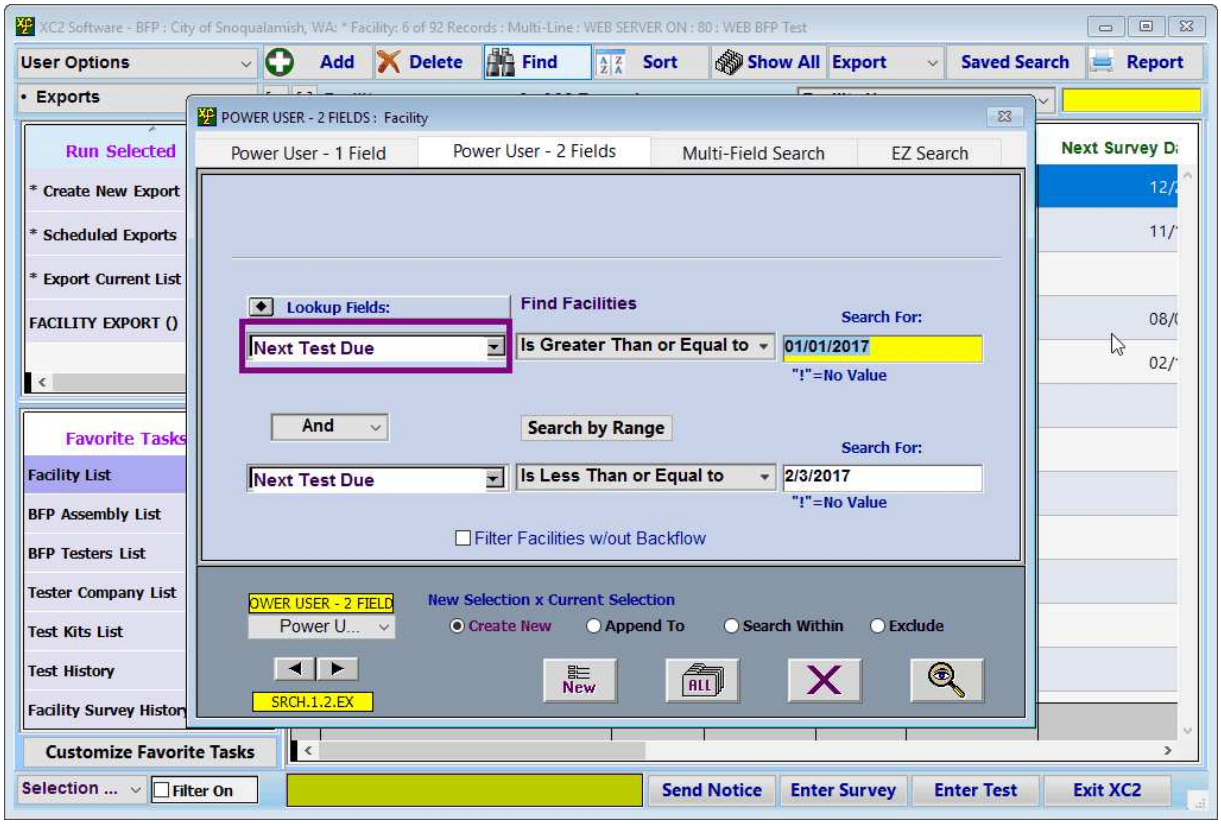
Search for records that you would like to send notices to

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

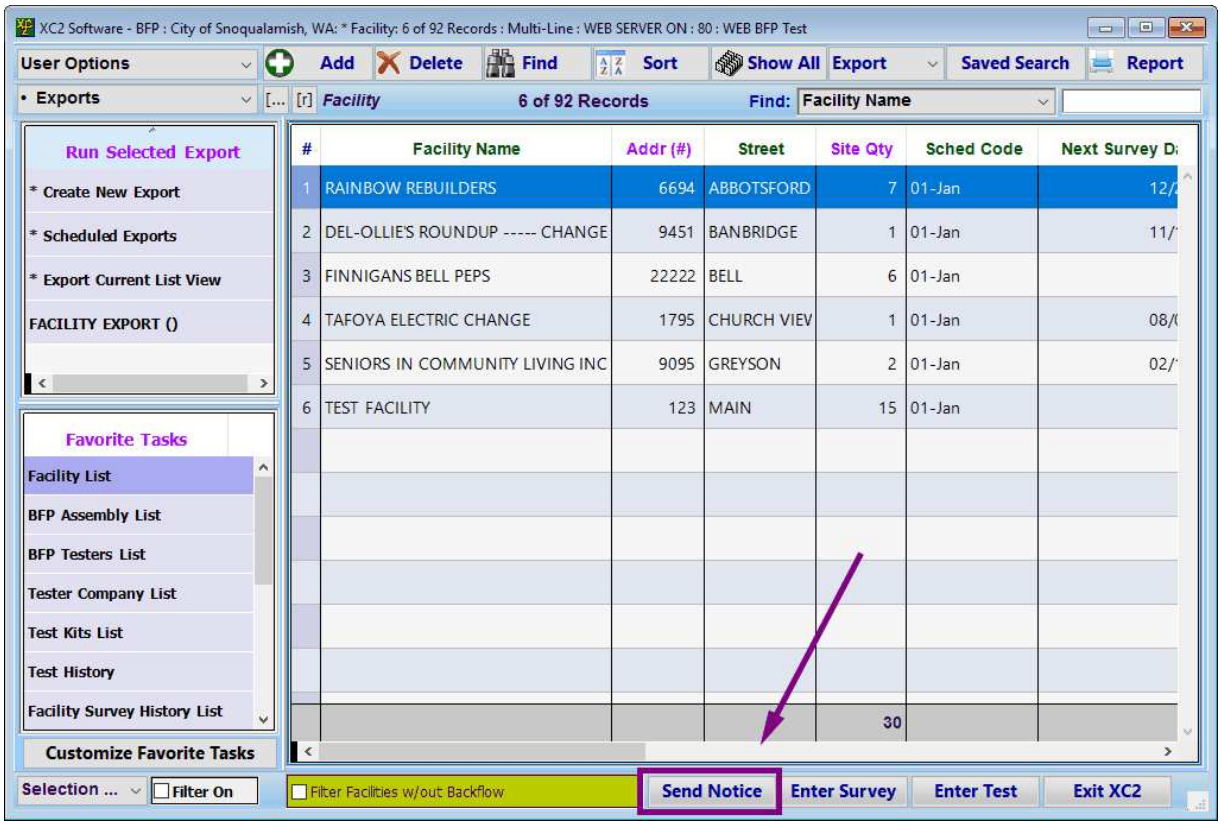
Here I am performing a search for next test due date



Notes:

Click Send Notices

Once you have the list of records that you would like to send notices to, click send notices



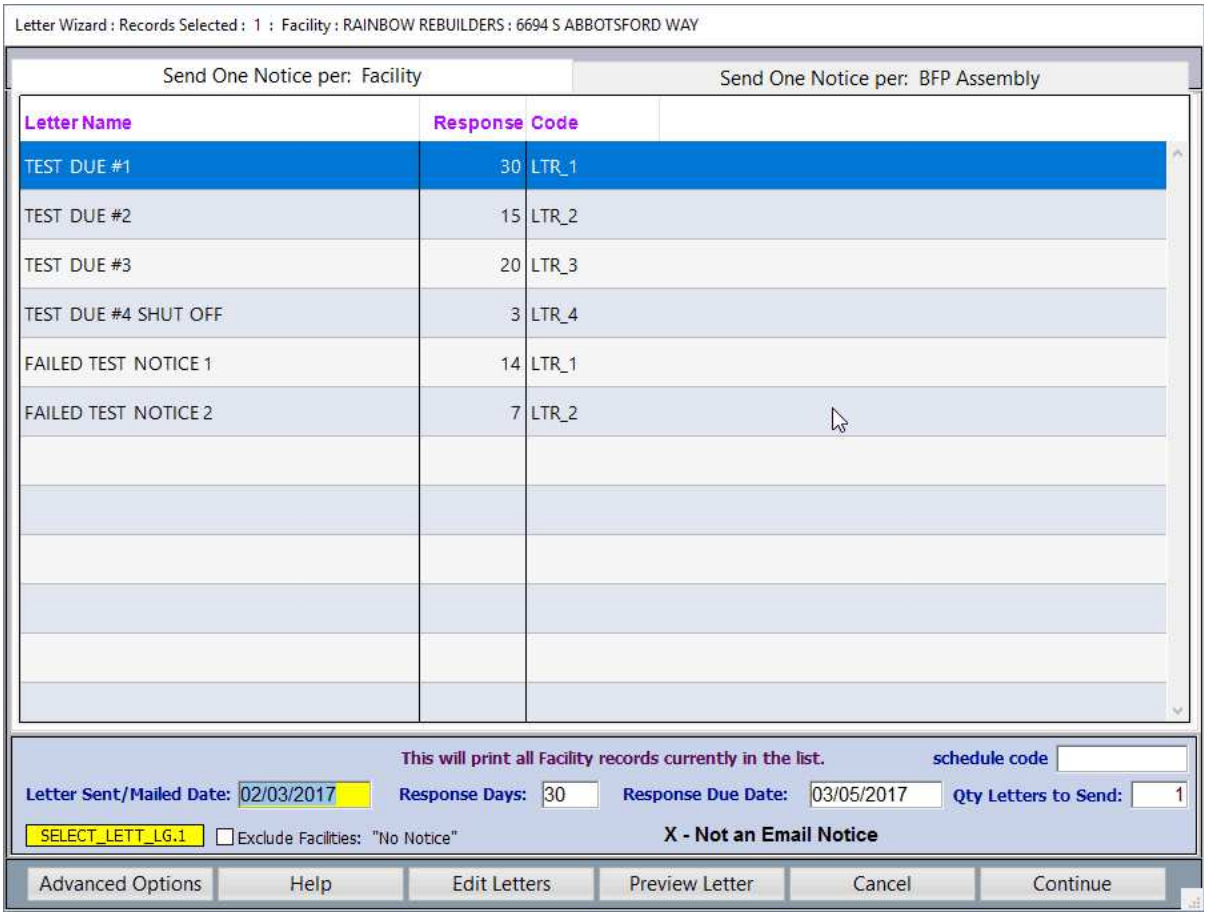
Notes:

One or all records

confirm records

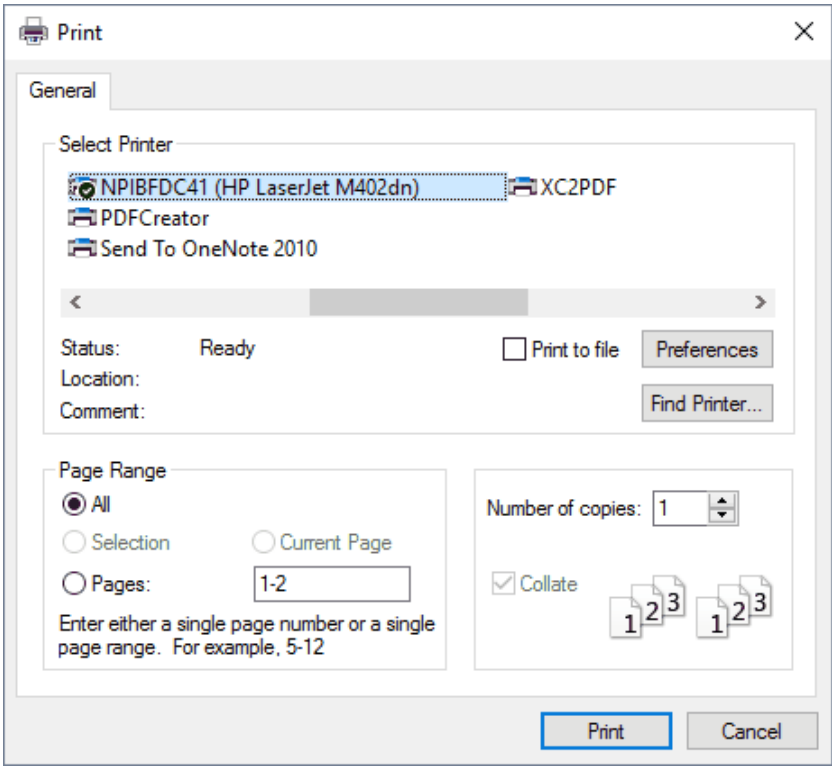
Notes:

Choose Notice



Notes:

Choose Printer



Notes:

Confirm Action

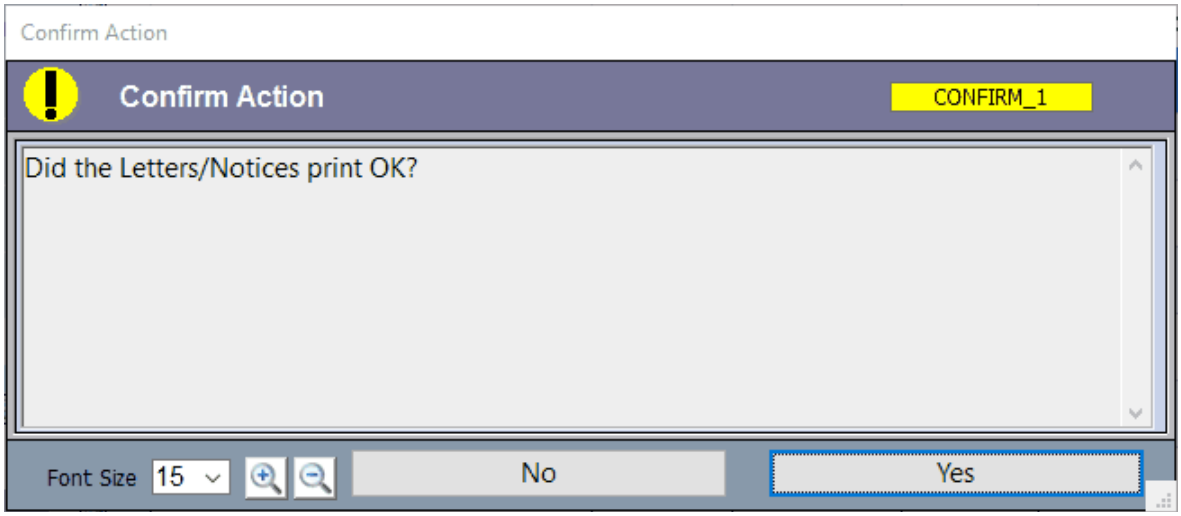
All letters should be printed.

Look over your letters. -- Did they print ok? Was the letter setup correctly?

Click Yes if they printed correctly.

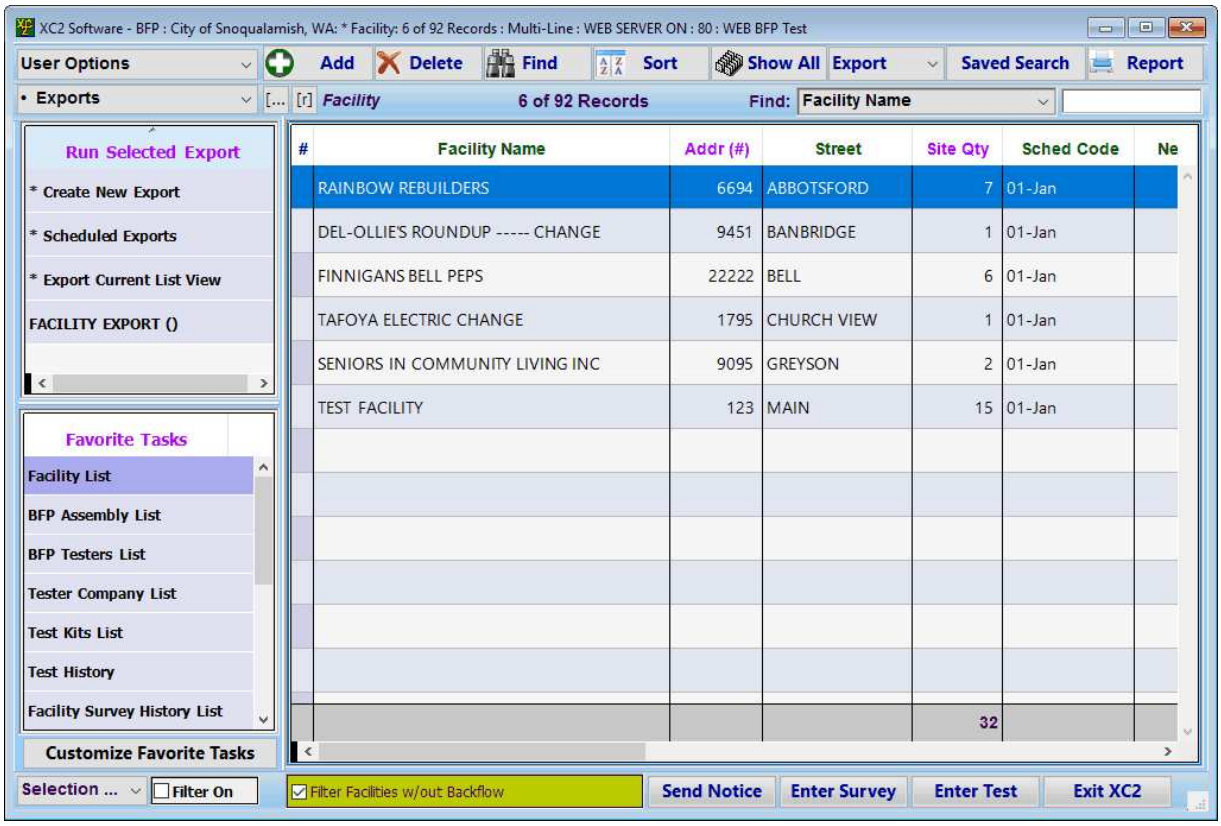
If you click yes, XC2 will assign a response due date to the backflow assembly.

You will use this response due date to track the notice



Notes:

You will be directed back to your list of records



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 Assemby 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

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

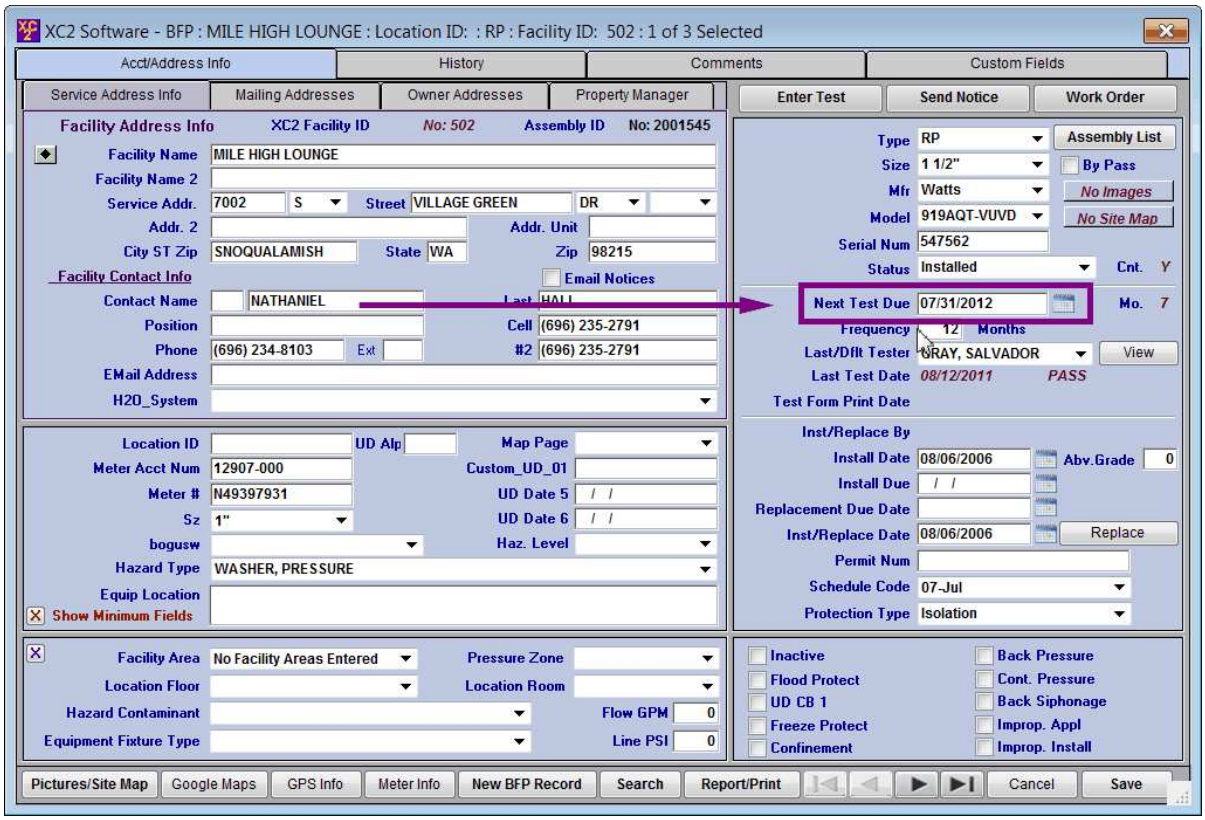
2) Response Due Date

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.

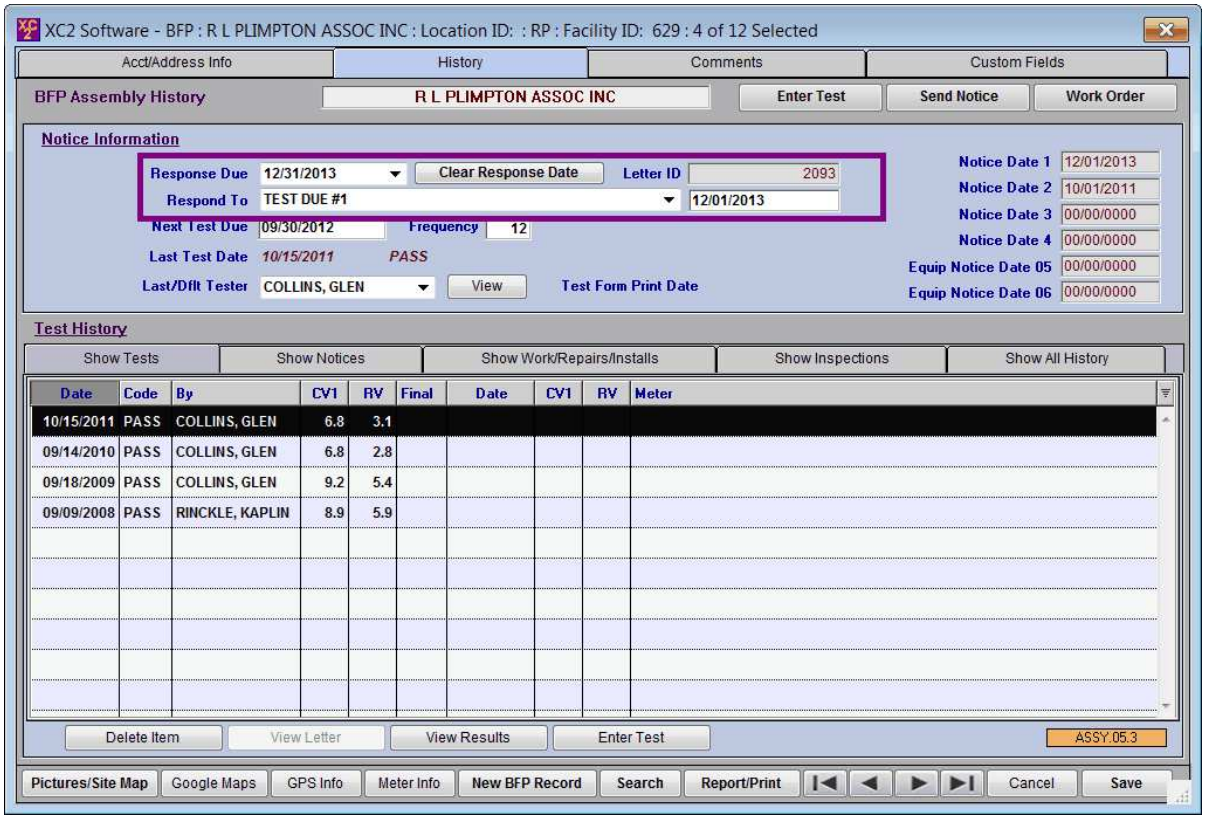
Here 47 assemblies are either past their Next Test Due Date, or are approaching their Next Test Due date within 30 Days.

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.



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

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

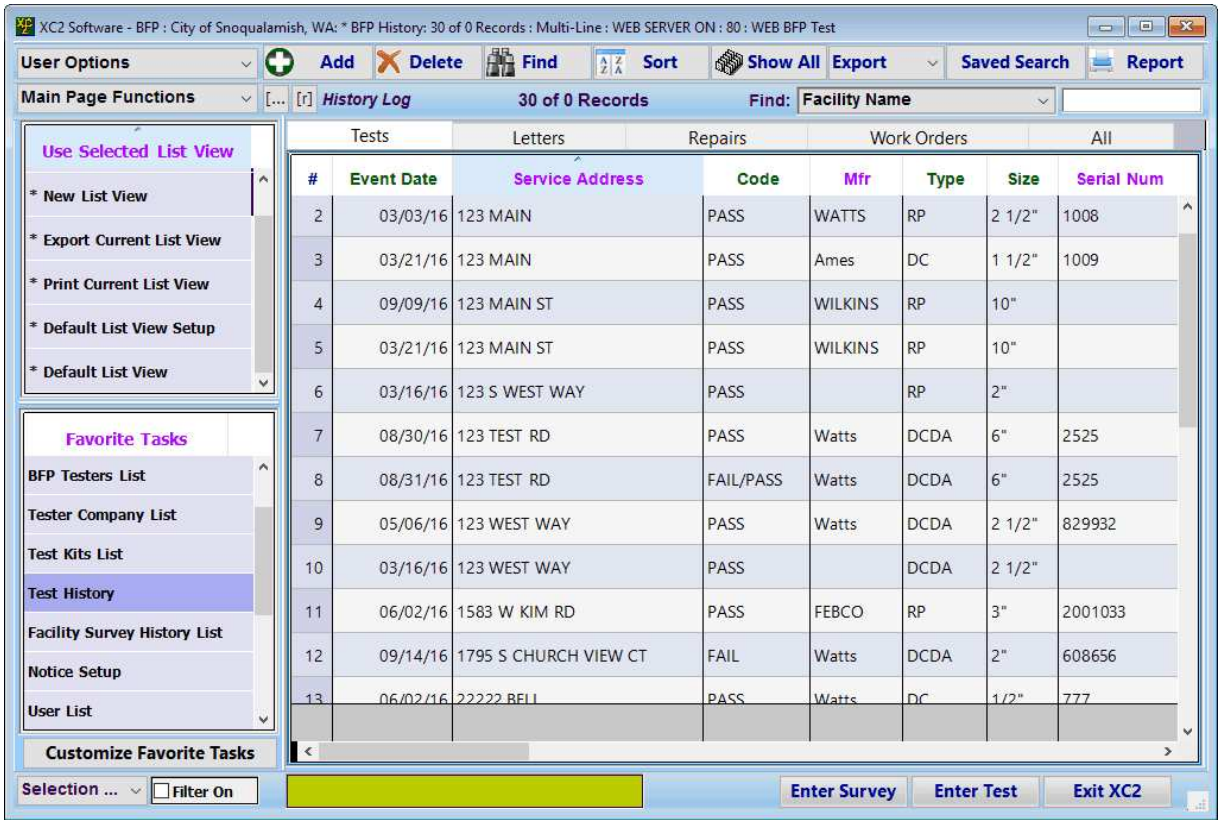
This page is an overview of the backflow assembly history list view

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

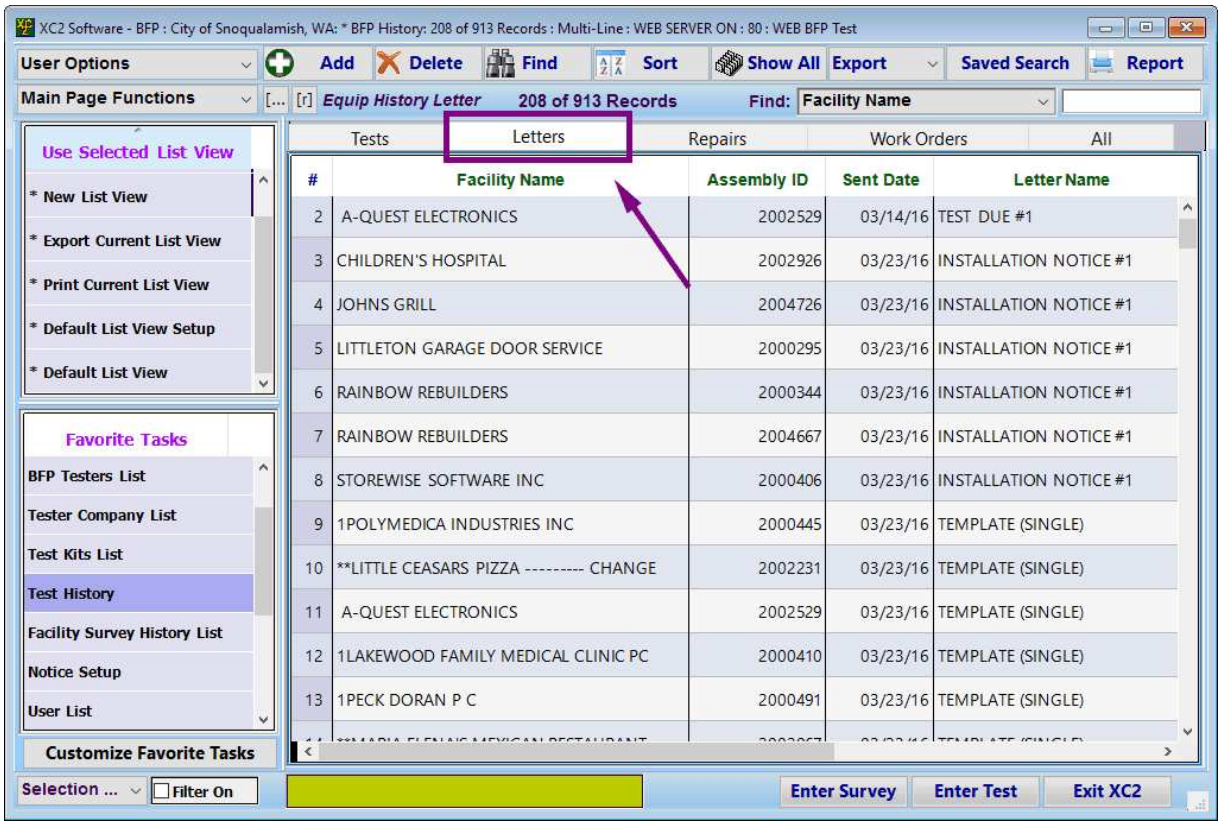
The records are seperated by tabs and each tab can be searched.



Notes:

Tabs

Click a Tab to select a different record area



Notes:

XC2 Software Knowledge Base

How to Search BFP Test History

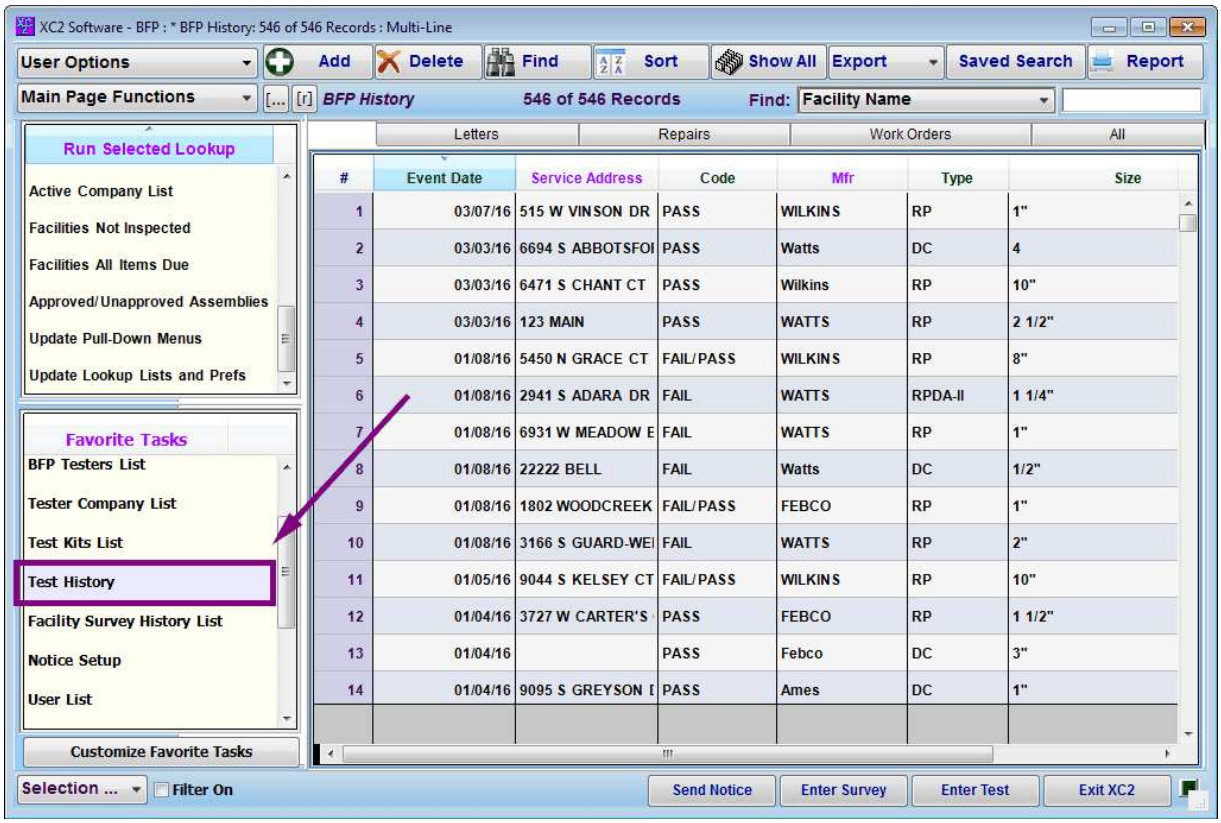
KB Asset ID: 3217

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.

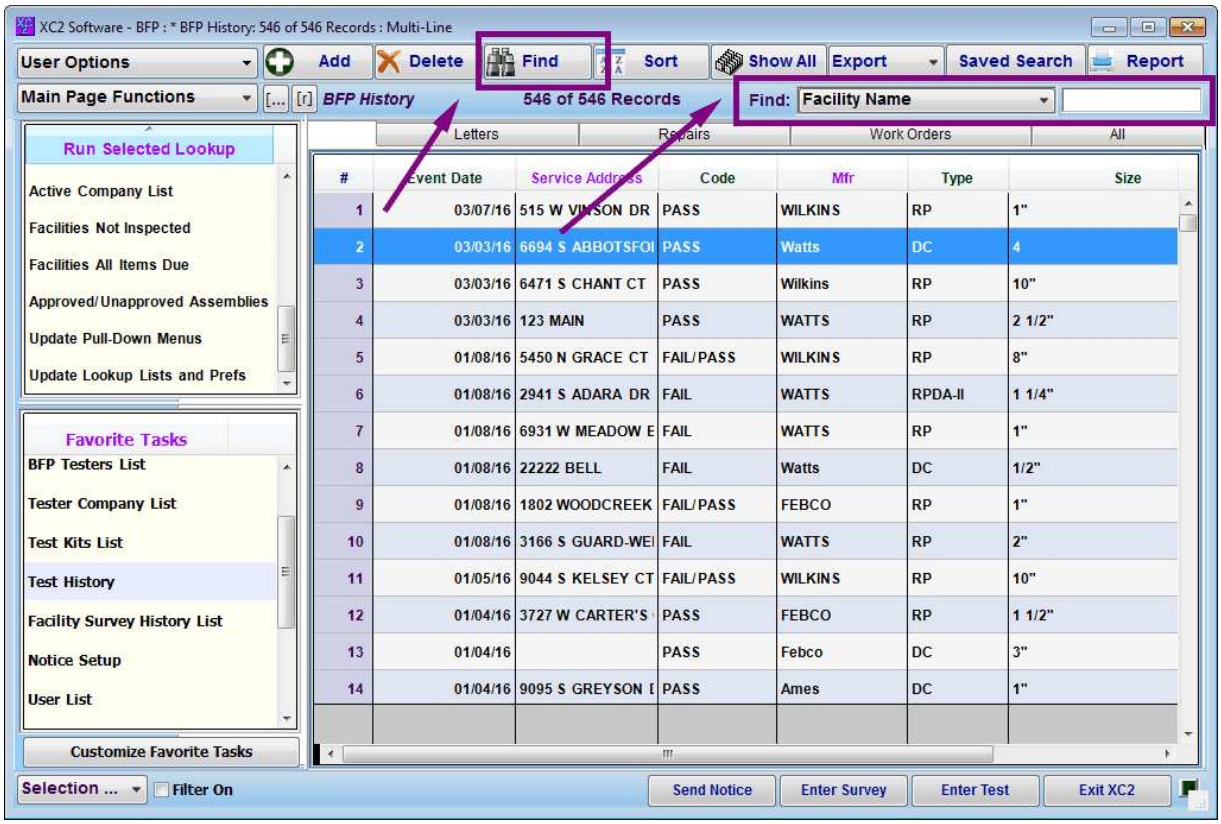
To view test history, click Test History on the main screen.



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.

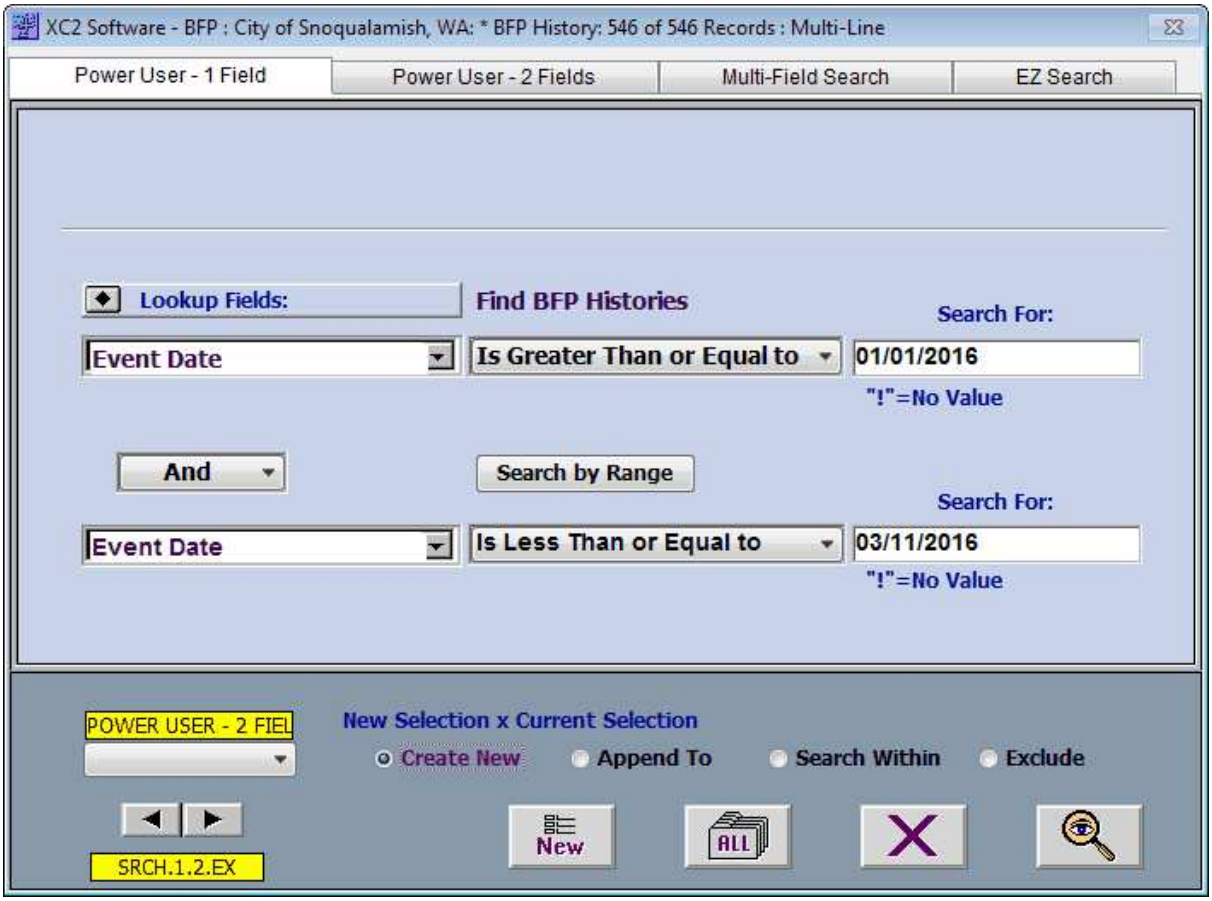
Choose the parameters that fit your needs.

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.

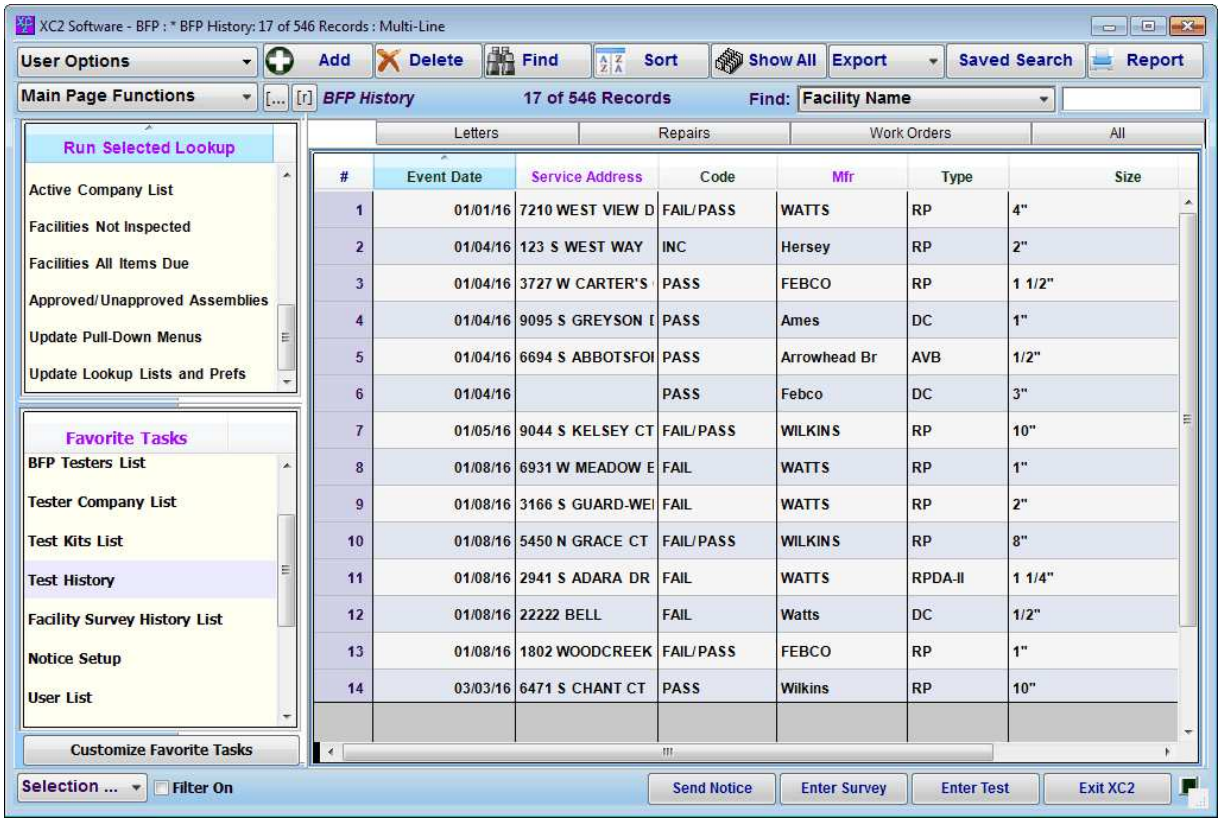


Notes:

Search Results

Aafter 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.



Notes:

XC2 Software Knowledge Base

Adding Entry Method to Test History List

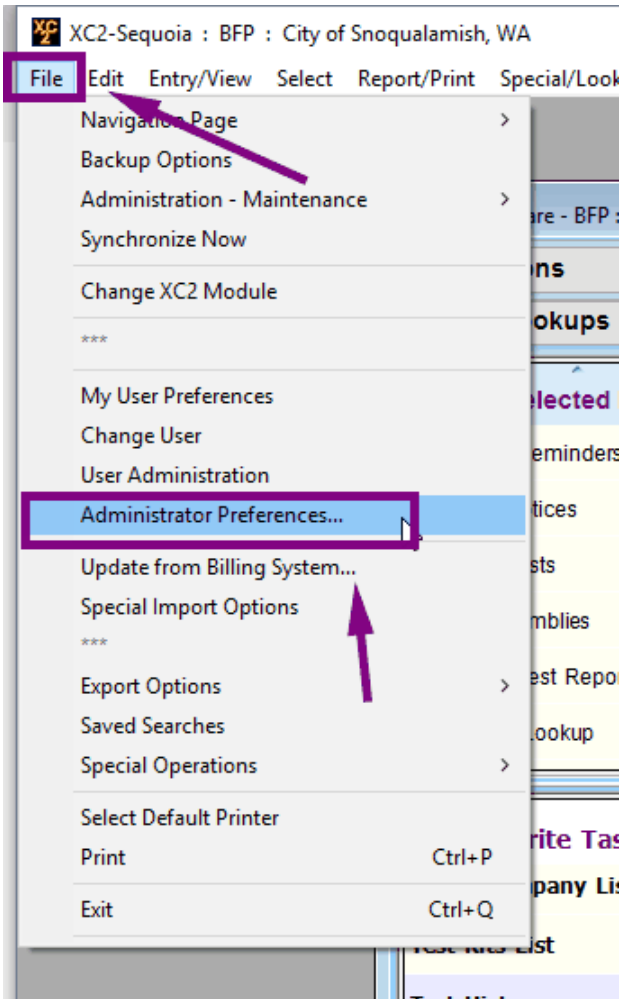
KB Asset ID: 3422

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:

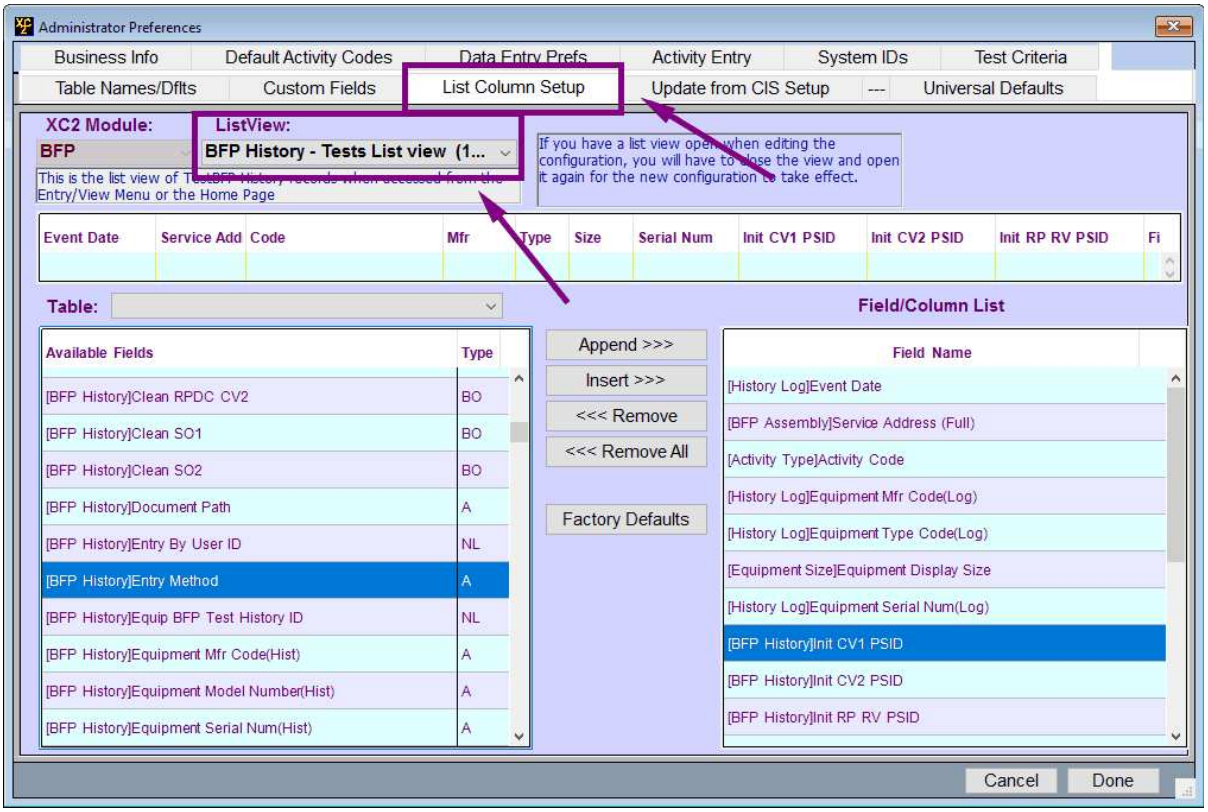
Administrator Preferences

Inside Administrator Preferences select

List Column Setup

Then

BFP History - Tests List View



Notes:

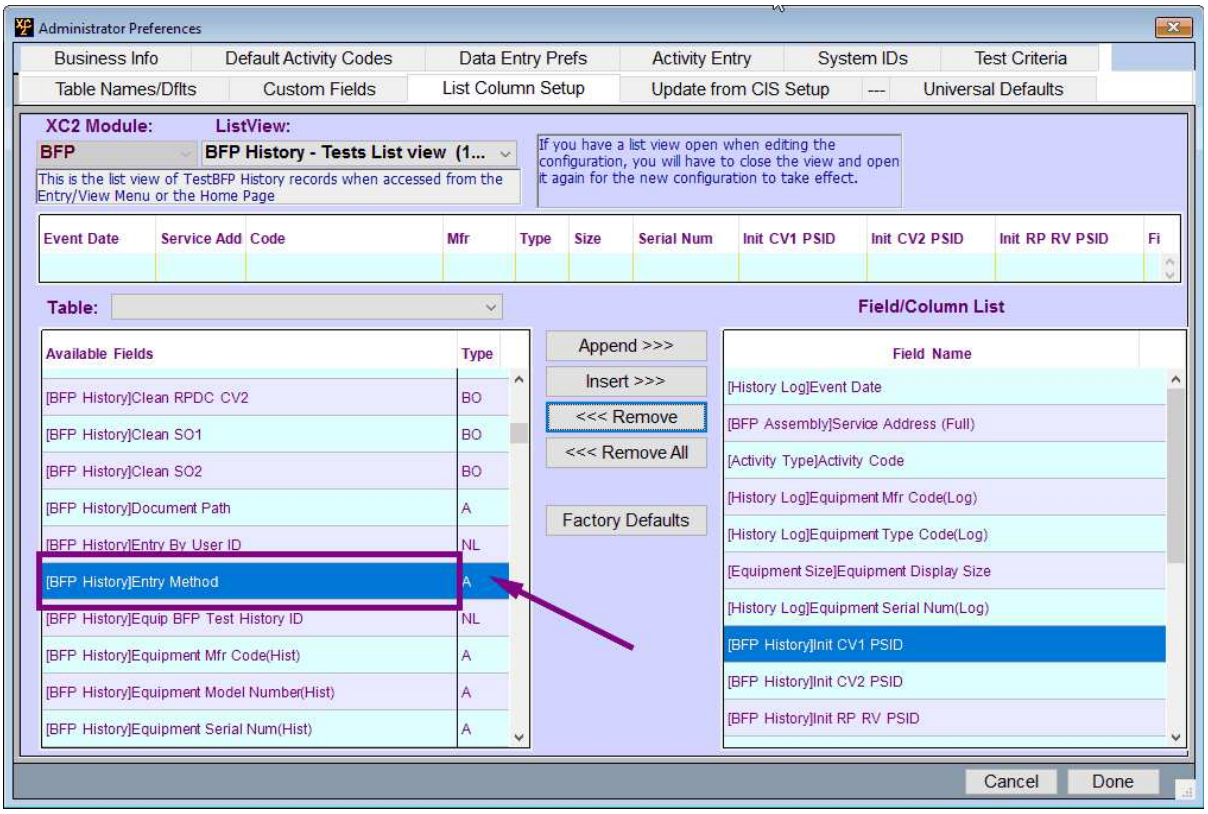
Add Entry Method To Your List

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



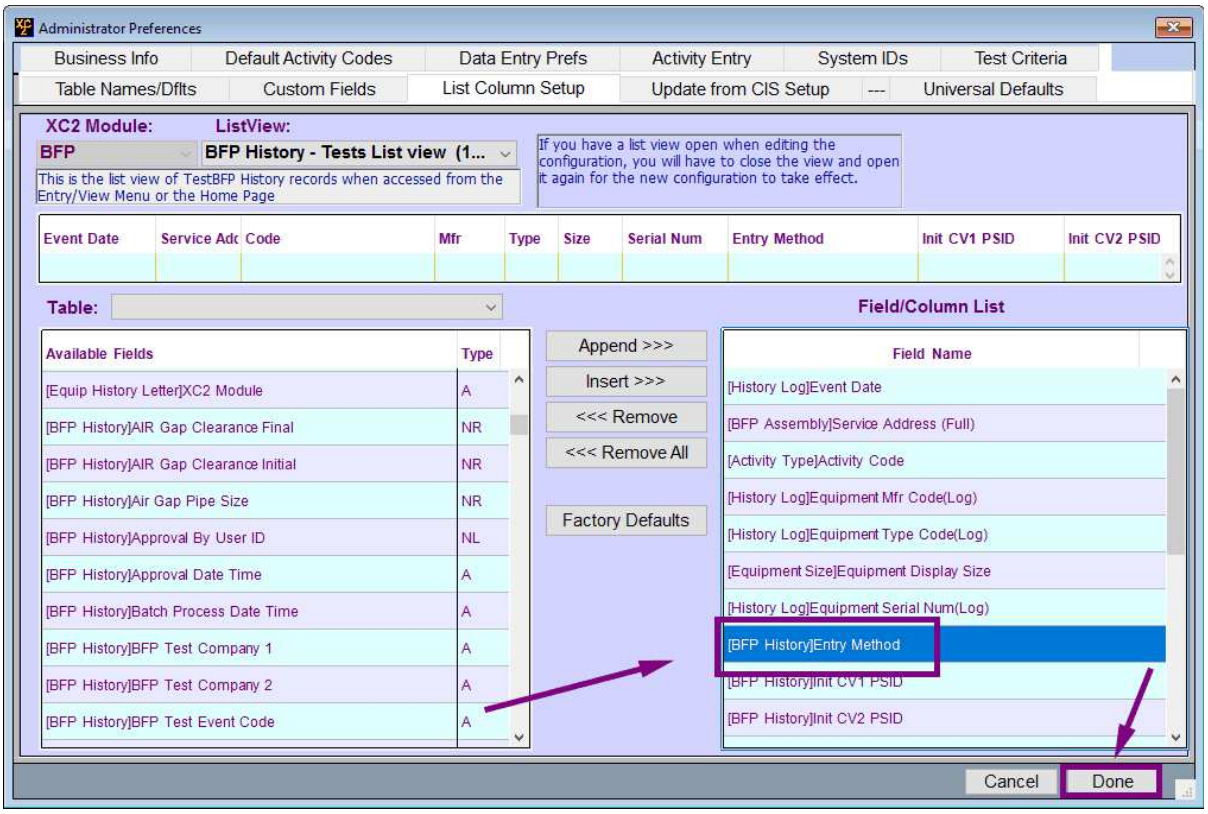
Notes:

Adjusting Field In the List

You may want to move the field.

Drag the field up to your desired space.

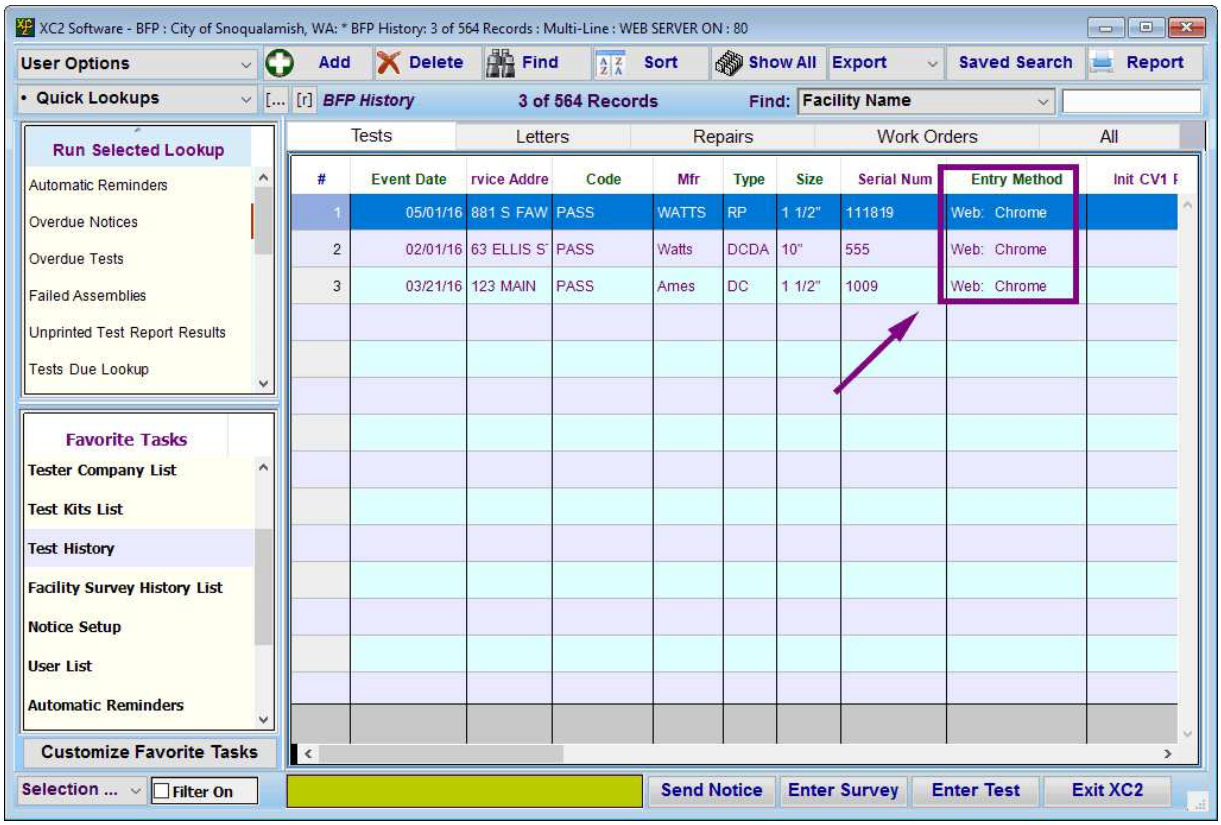
Click Done to Save



Notes:

Entry method will be added to your list view

Entry Method will be added to your list view



Notes:

XC2 Software Knowledge Base

How to View BFP Modification History

KB Asset ID: 3320

This page describes how to view the modification history for individual test records

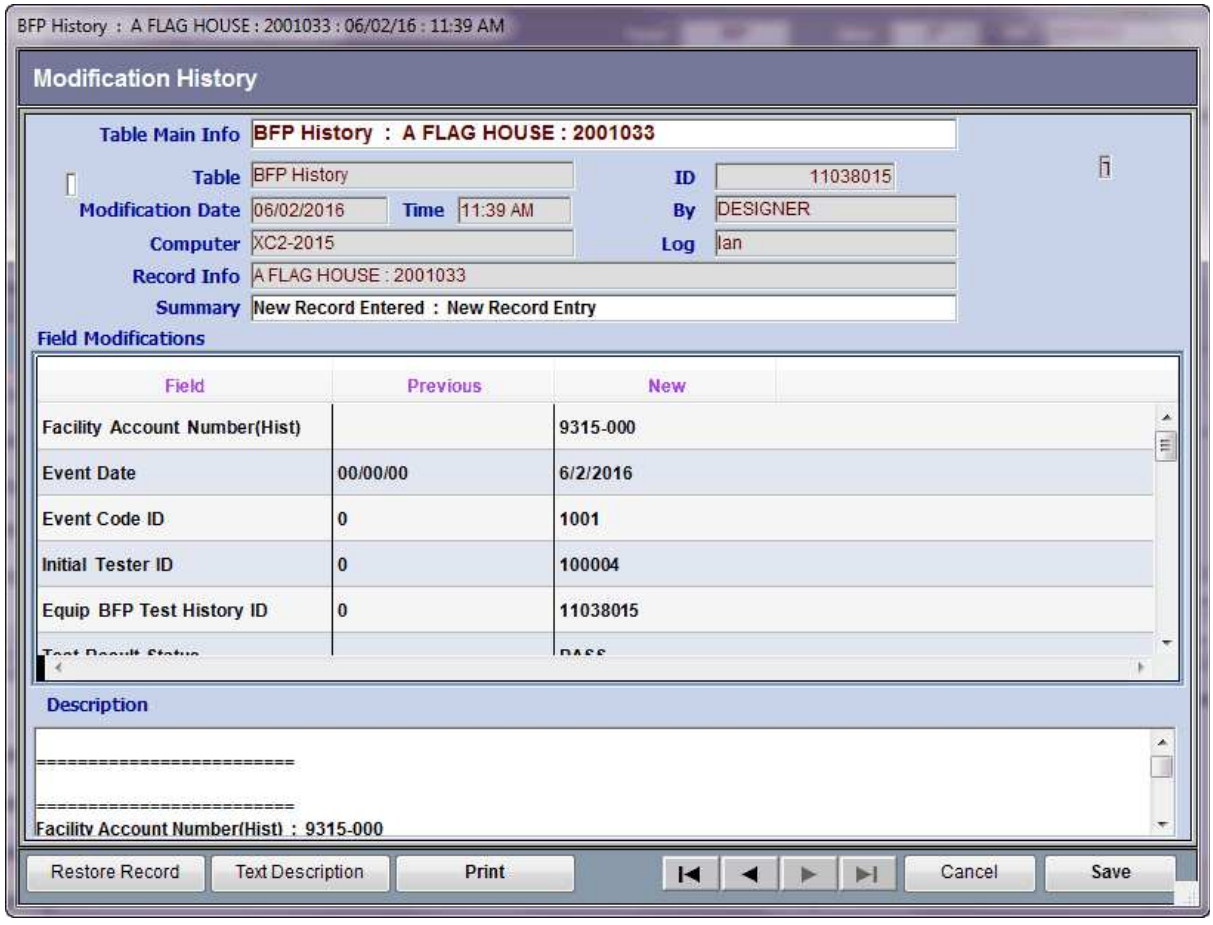
Modification History Record

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



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

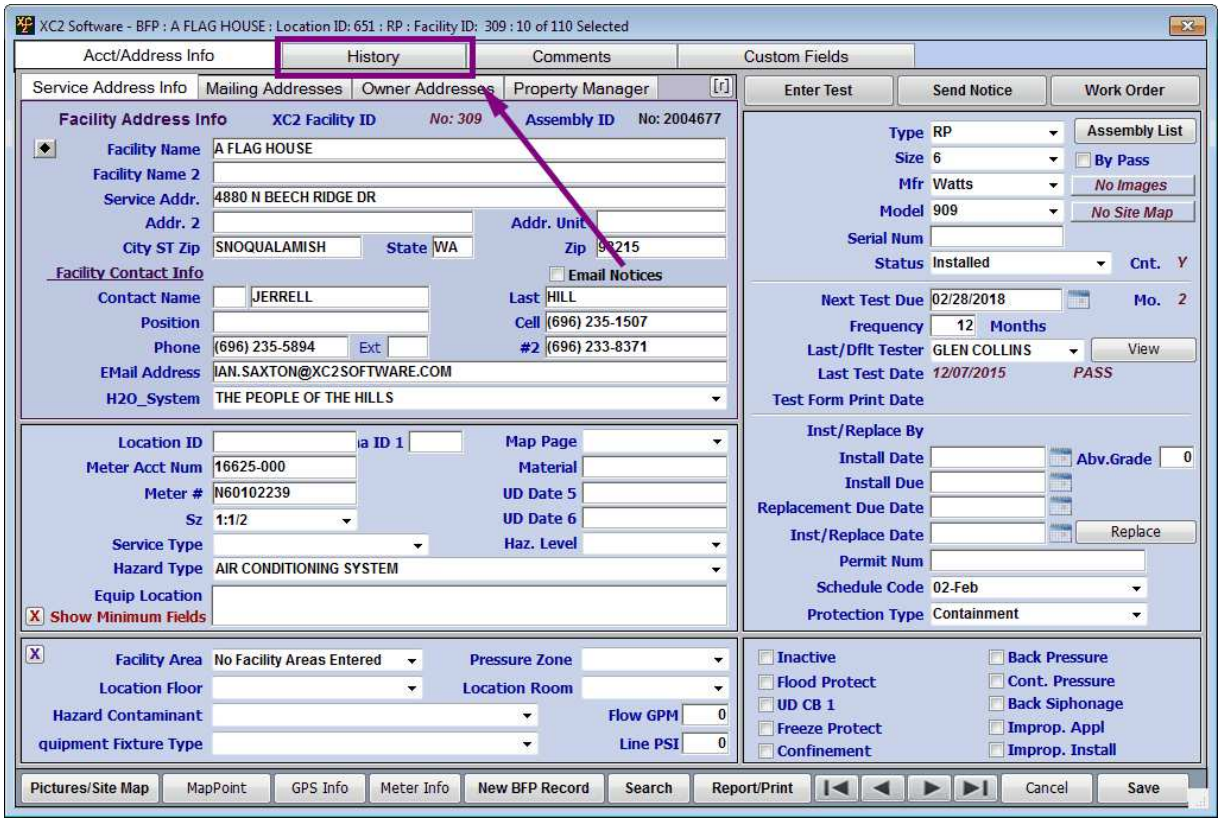
---

Open a Backflow Assembly Record

Open a Record of a Backflow Assembly

Inside of the Backflow Assembly Record

Click the History Tab

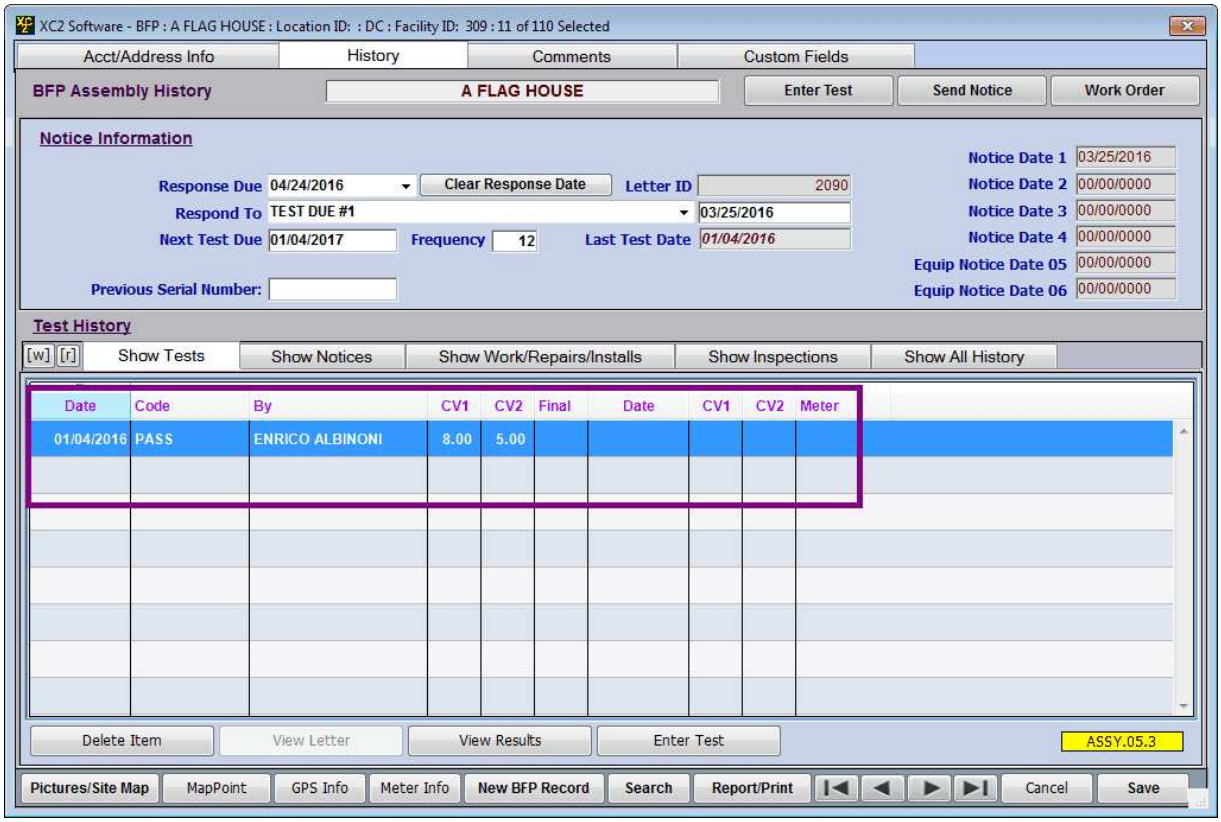


Notes:

Test History

The first tab is the test History for that Backflow Assembly

Double click on the test record to open a record



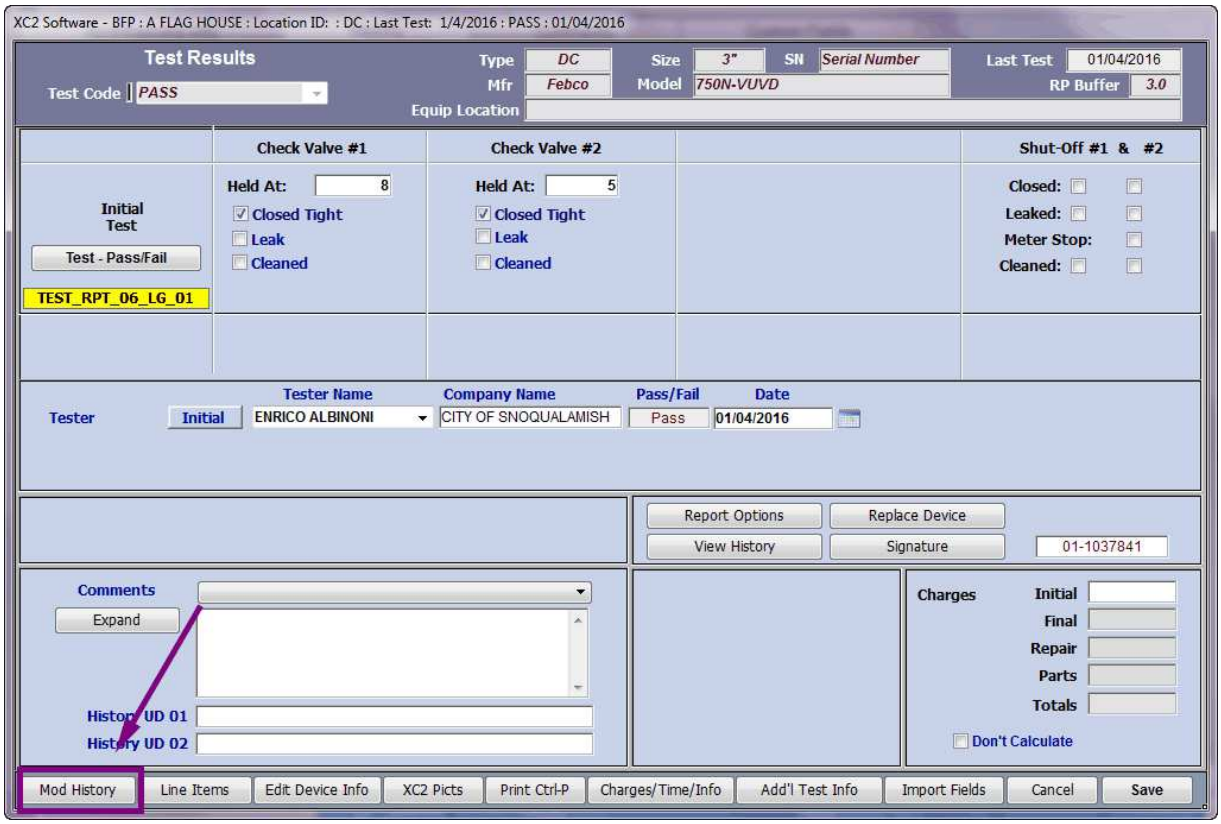
Notes:

Test Record

Here is the Test Record

In the bottom left corner of the test record is the Modification History button

Click Mod History



Notes:

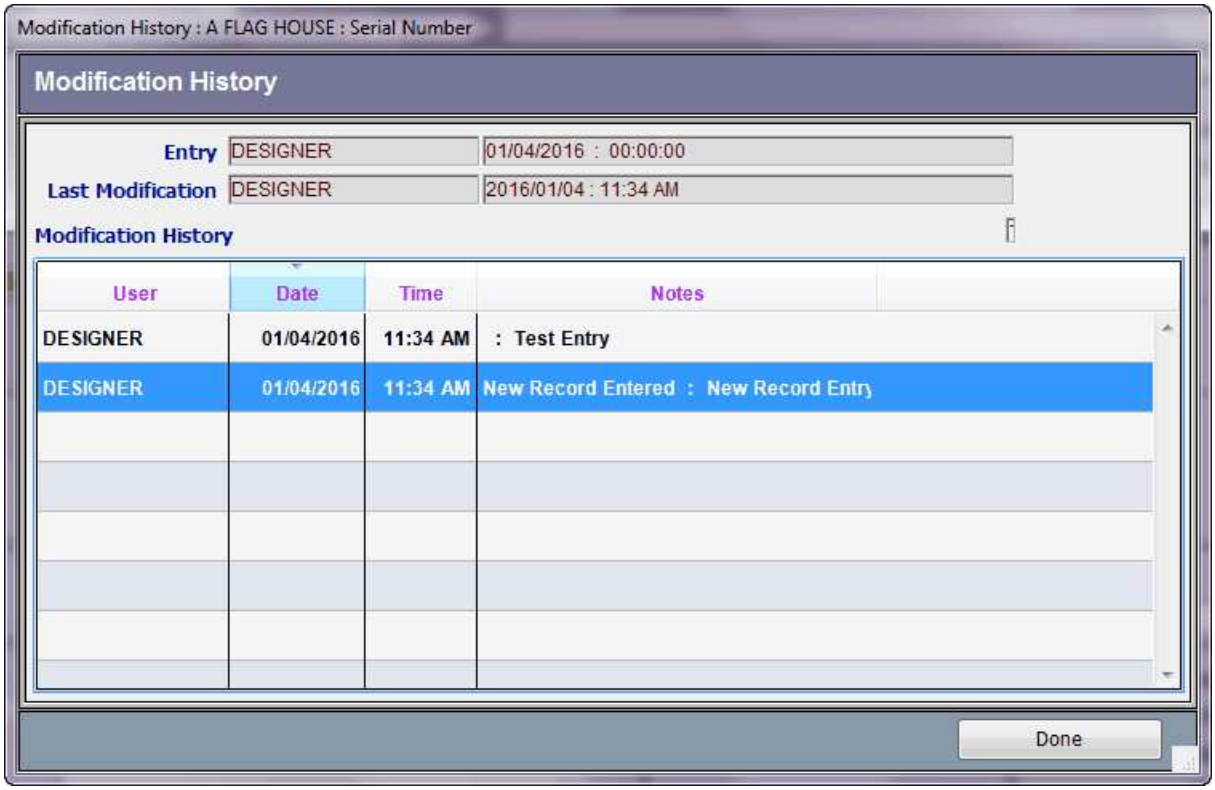
Full Modification History

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.

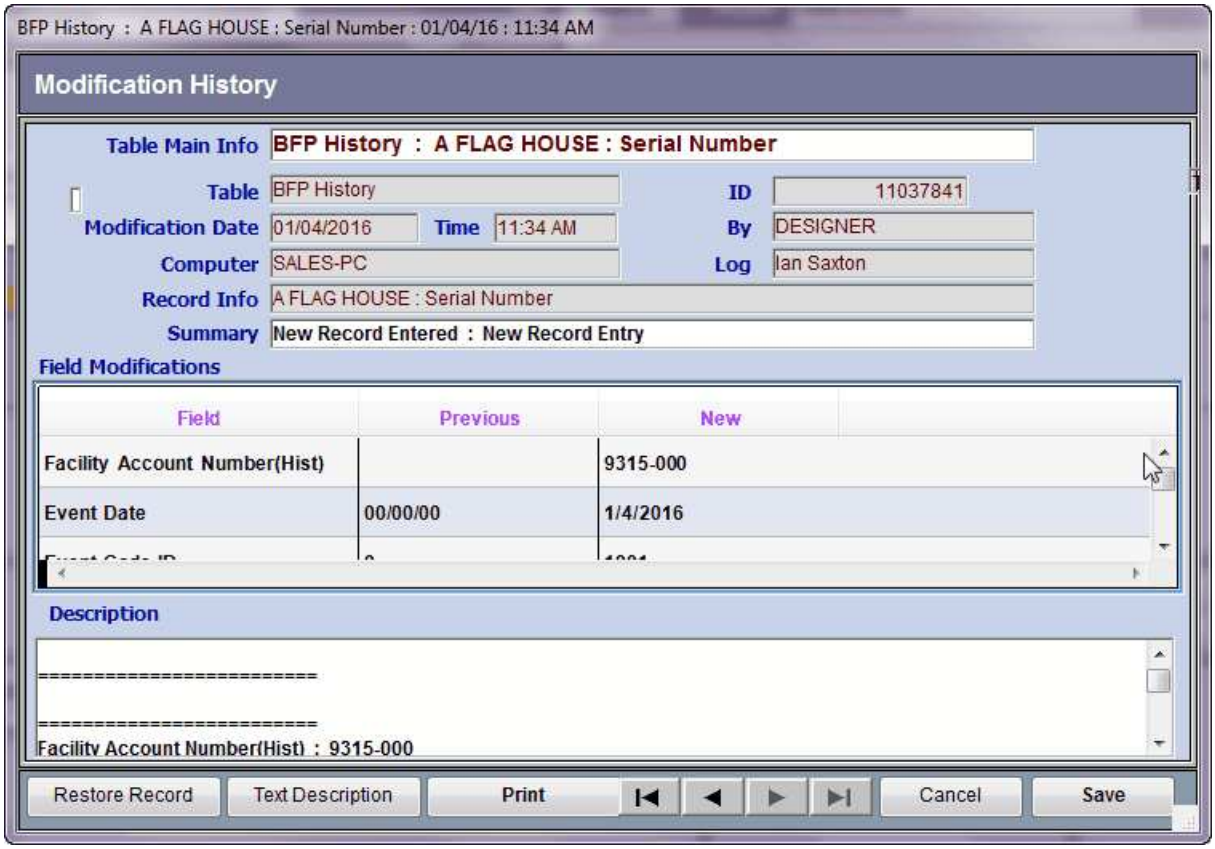


Notes:

Details About a Certain Event

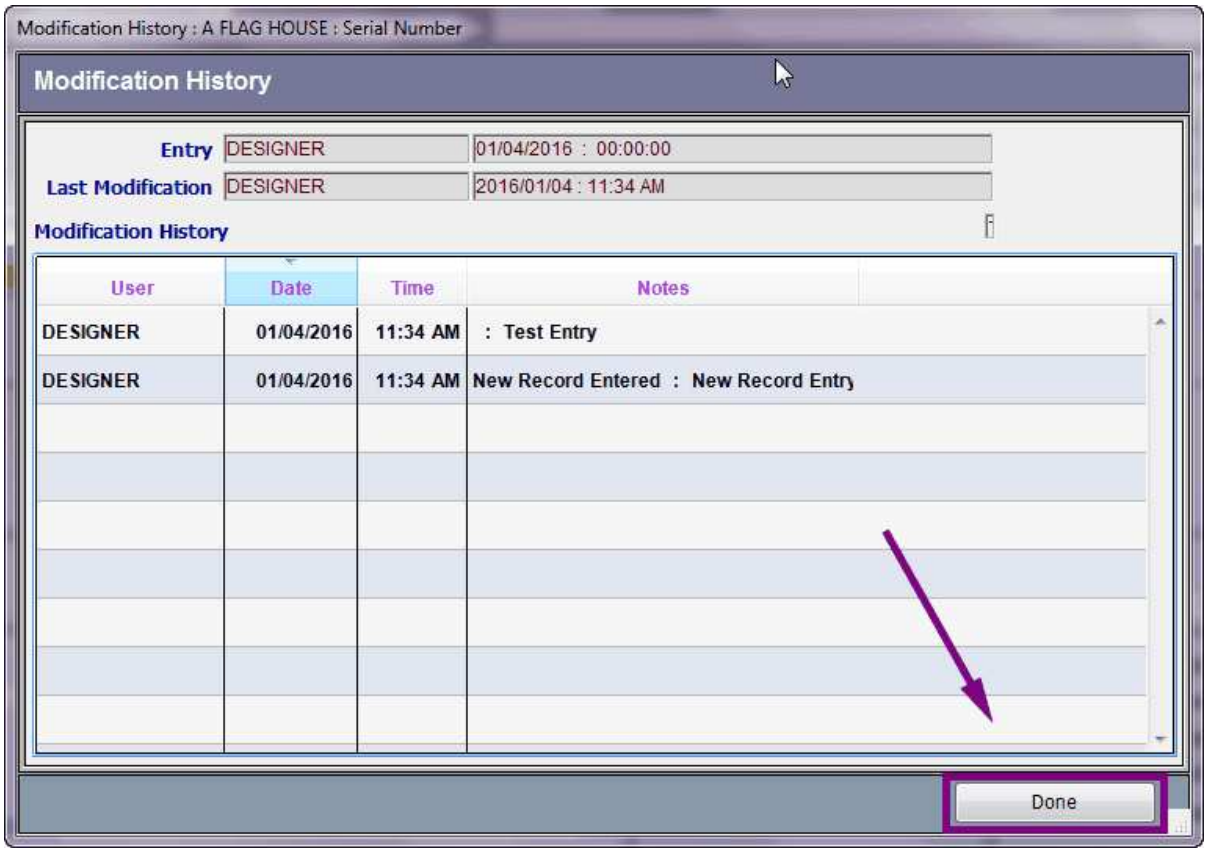
Inside of each Modification History record will show what modification occurred and who did it

Click Save or Cancel to close the screen



Notes:

Click Done to Close the Record



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

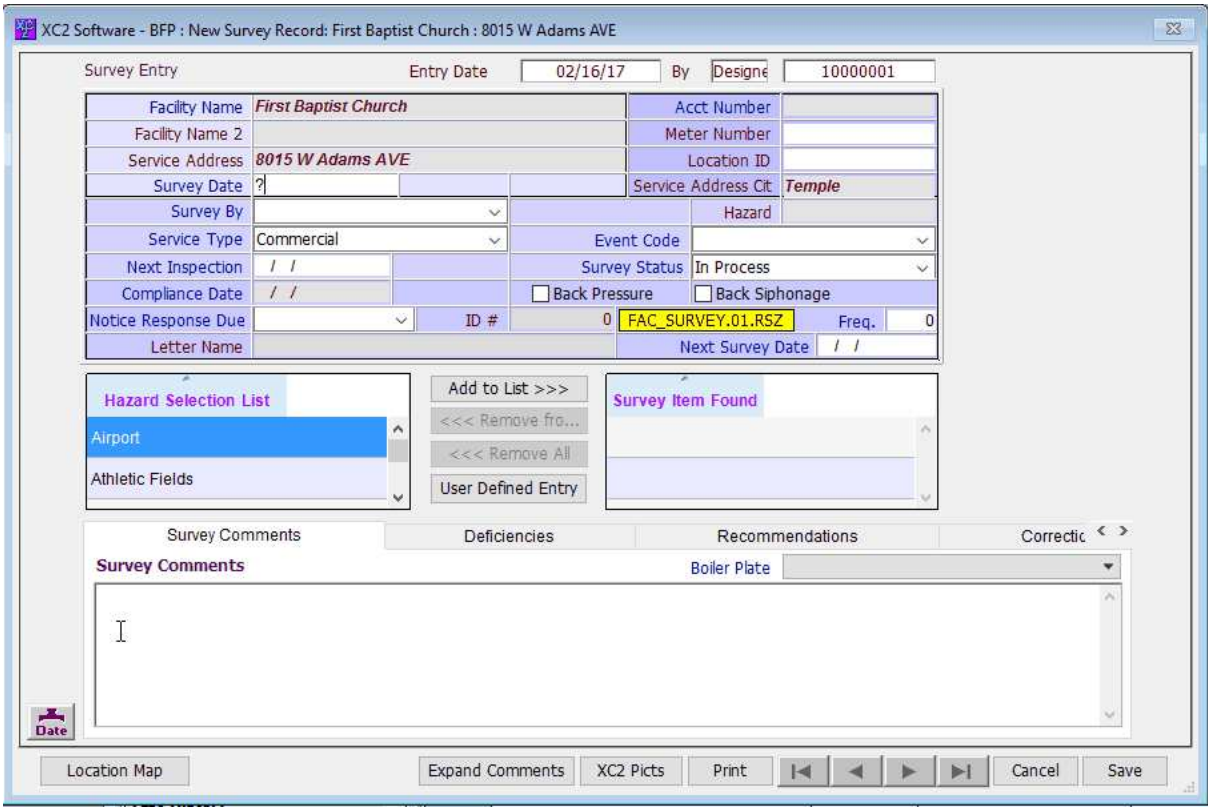
KB Asset ID: 3581

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



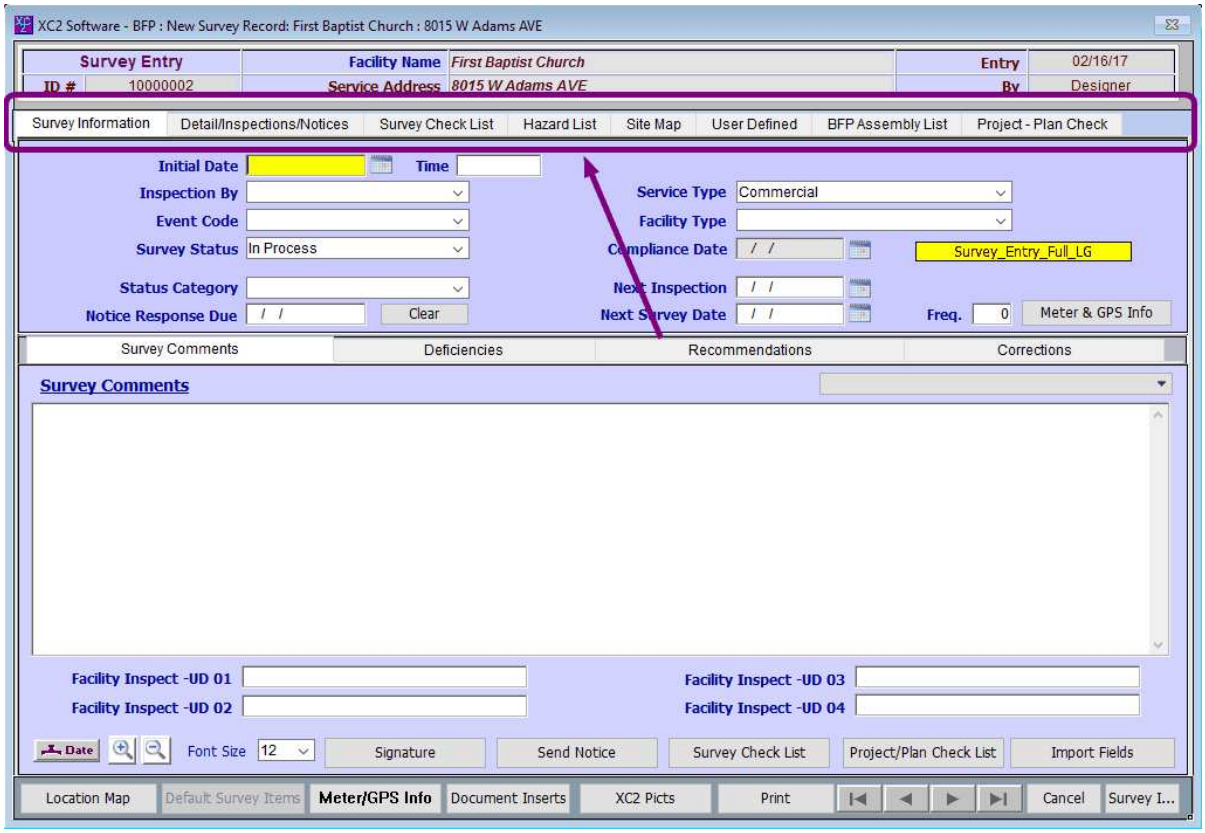
Notes:

Detailed Survey Entry

The detailed survey entry page has all the information that the Basic entry screen has and more

Additional Areas Available

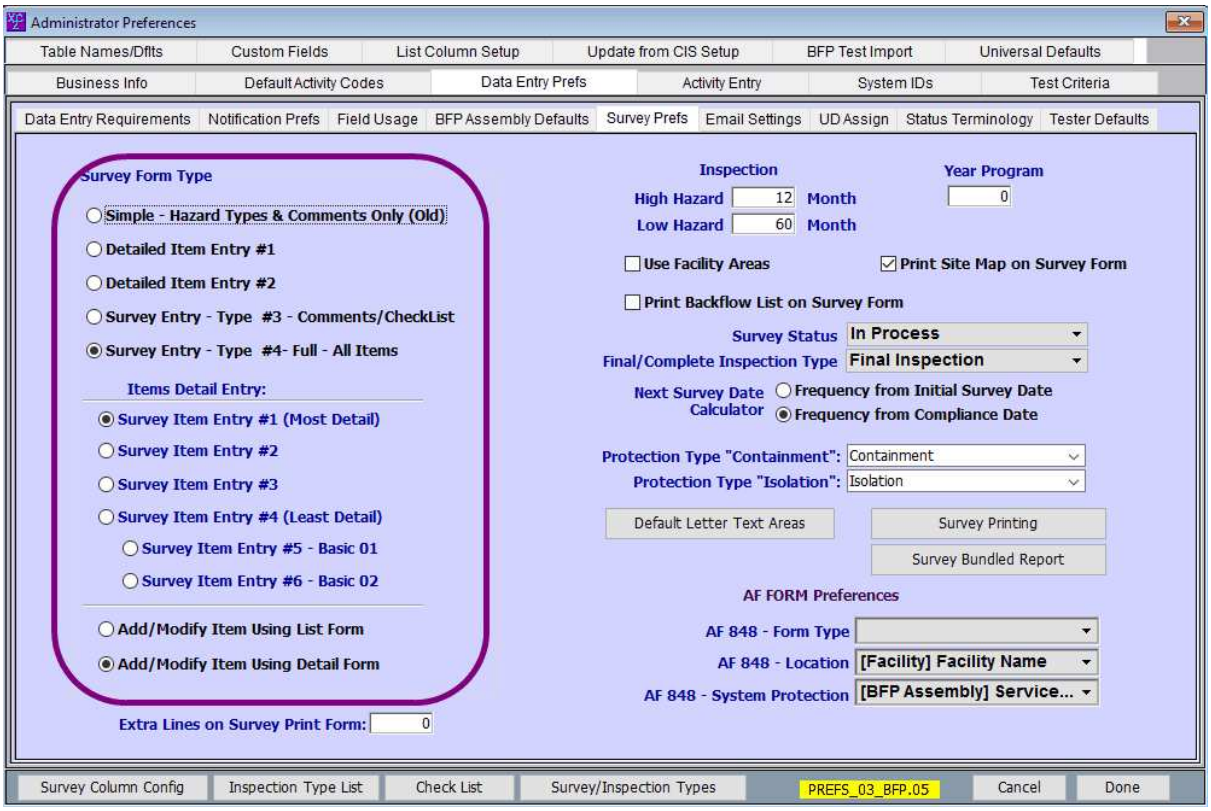
- Detail, Inspection, and Notice History
- Survey Checklist
- Hazrd List
- Site Map
- User Defined (user customizable) Fields
- Associated Assemply List
- Project Plan Checklist



Notes:

Survey Setup

These types of survey entry and detail can be configure in the Administrator Preferences (Super Admin access required)under Survey Prefs



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

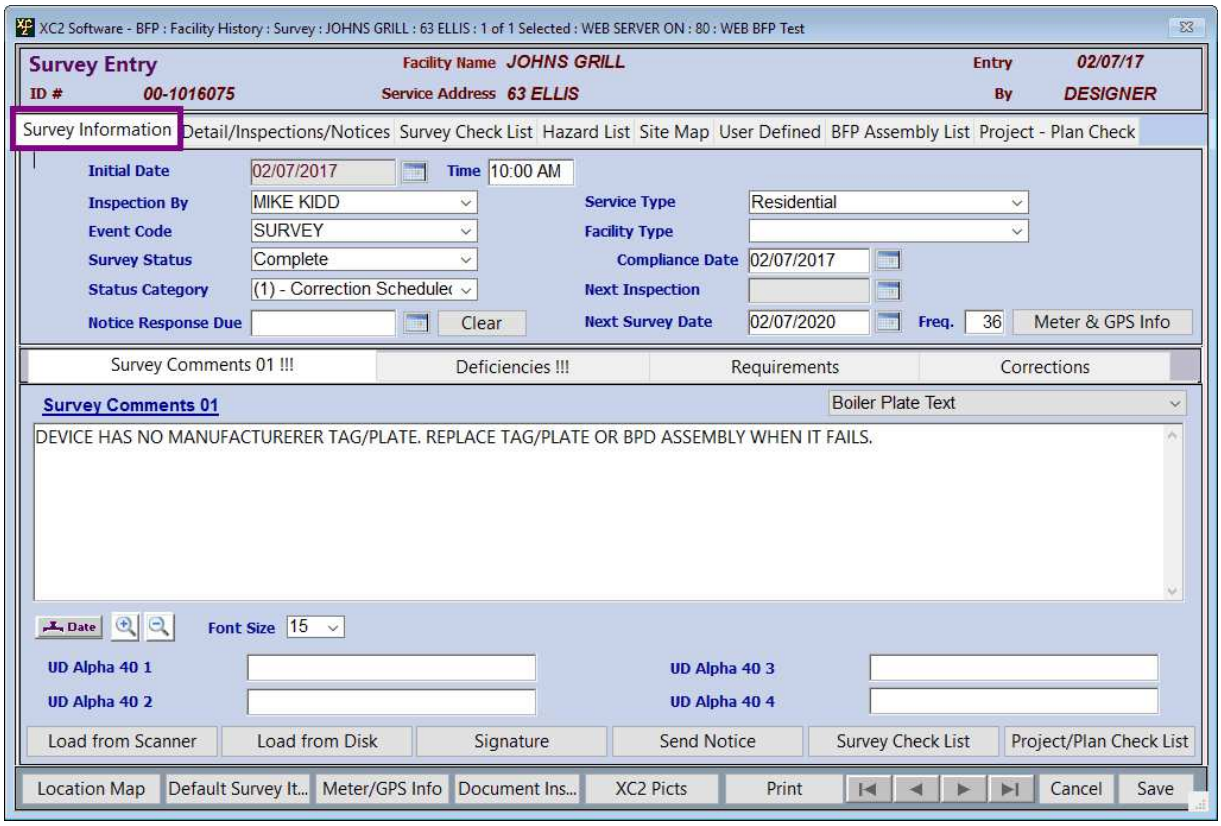
1) Initial Survey Date
2) Compliance Date
3) General Comments
4) Survey Status.

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) Deficencies
3) Requirements
4) Corrections

These are individual spaces that will print on your completed survey form.



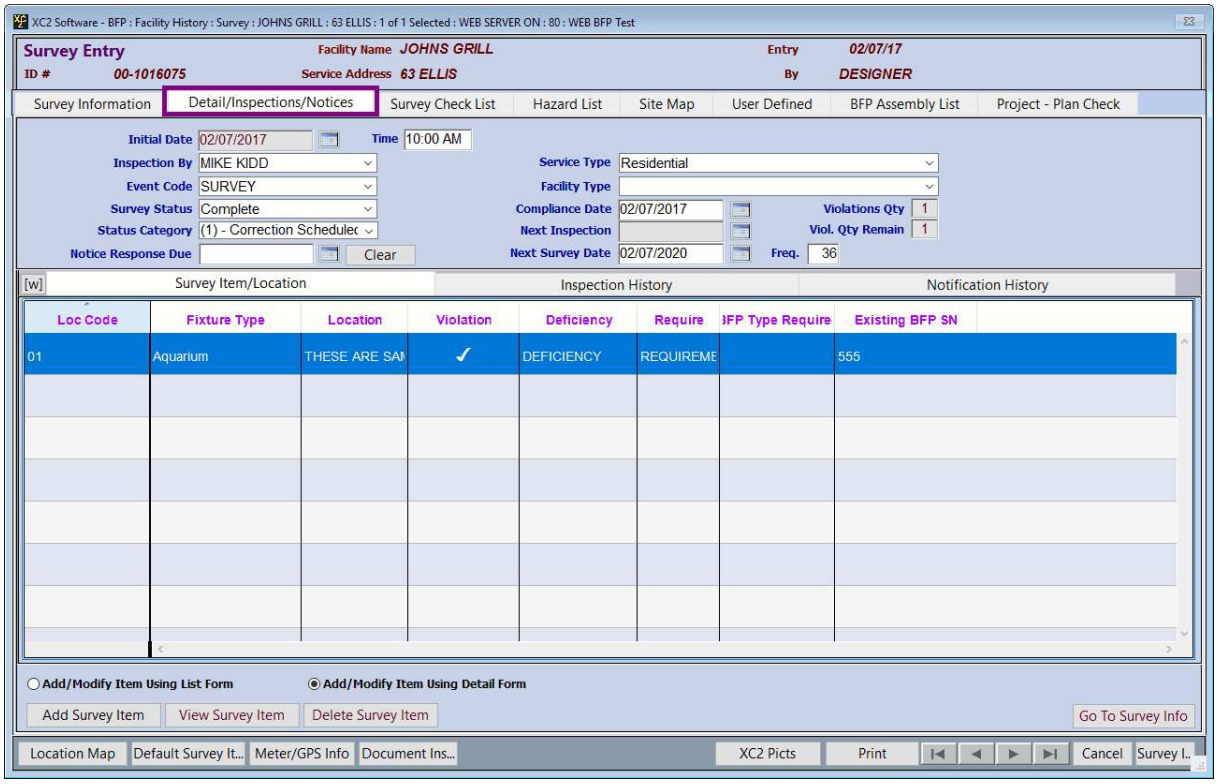
Notes:

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

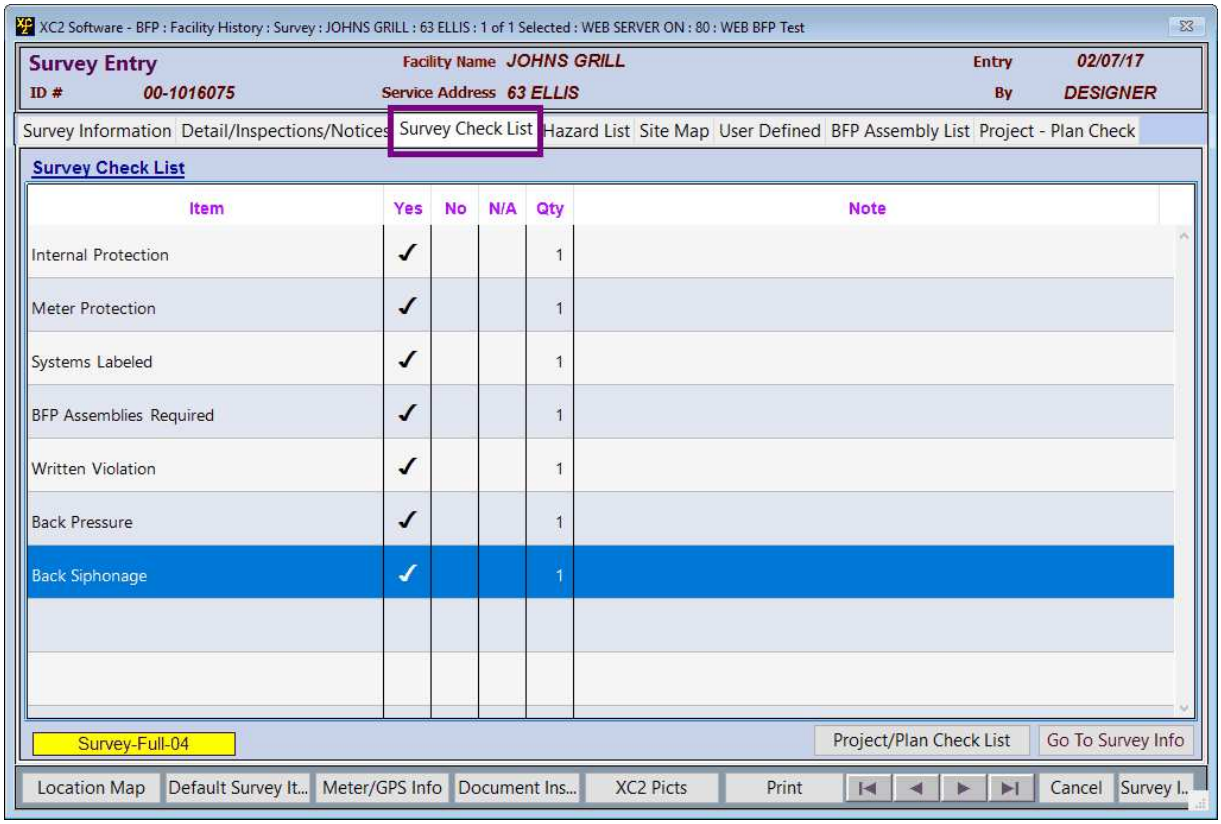


Notes:

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.

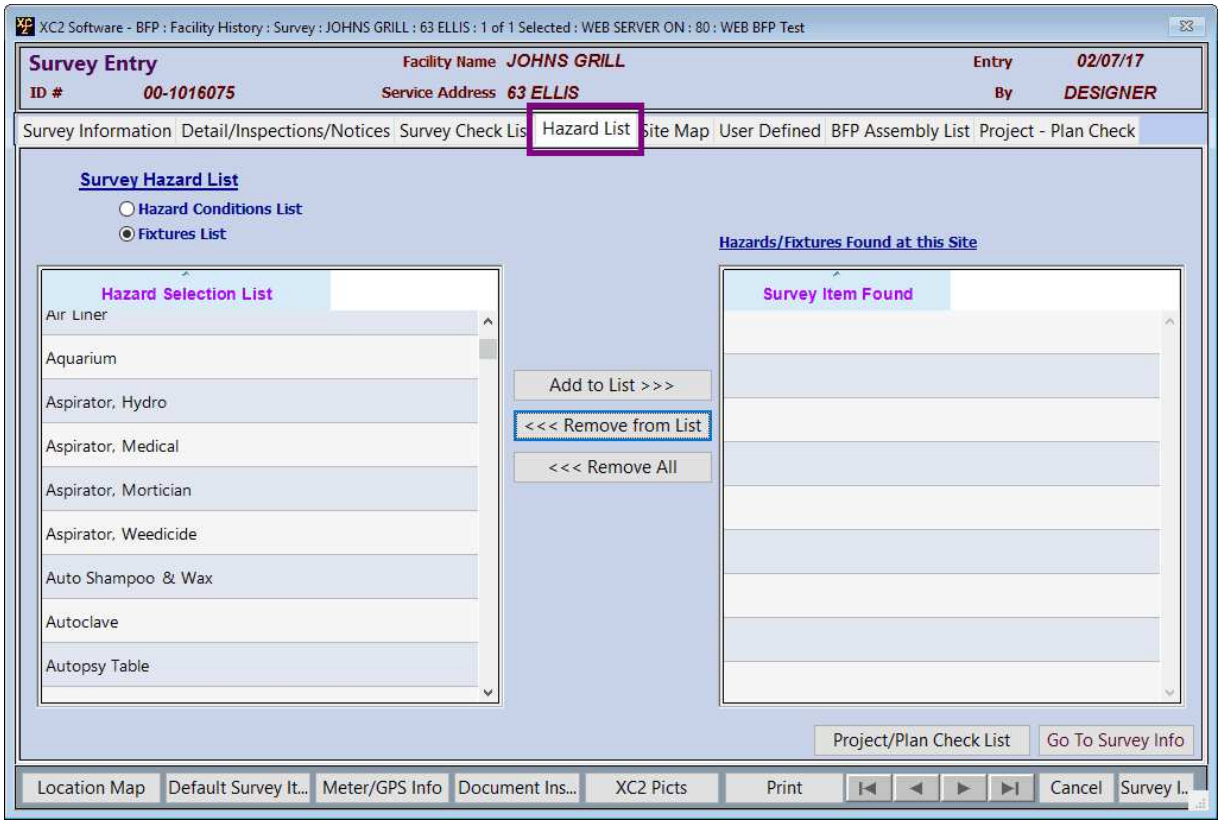


Notes:

Hazards List

If you would like to create your own hazards list

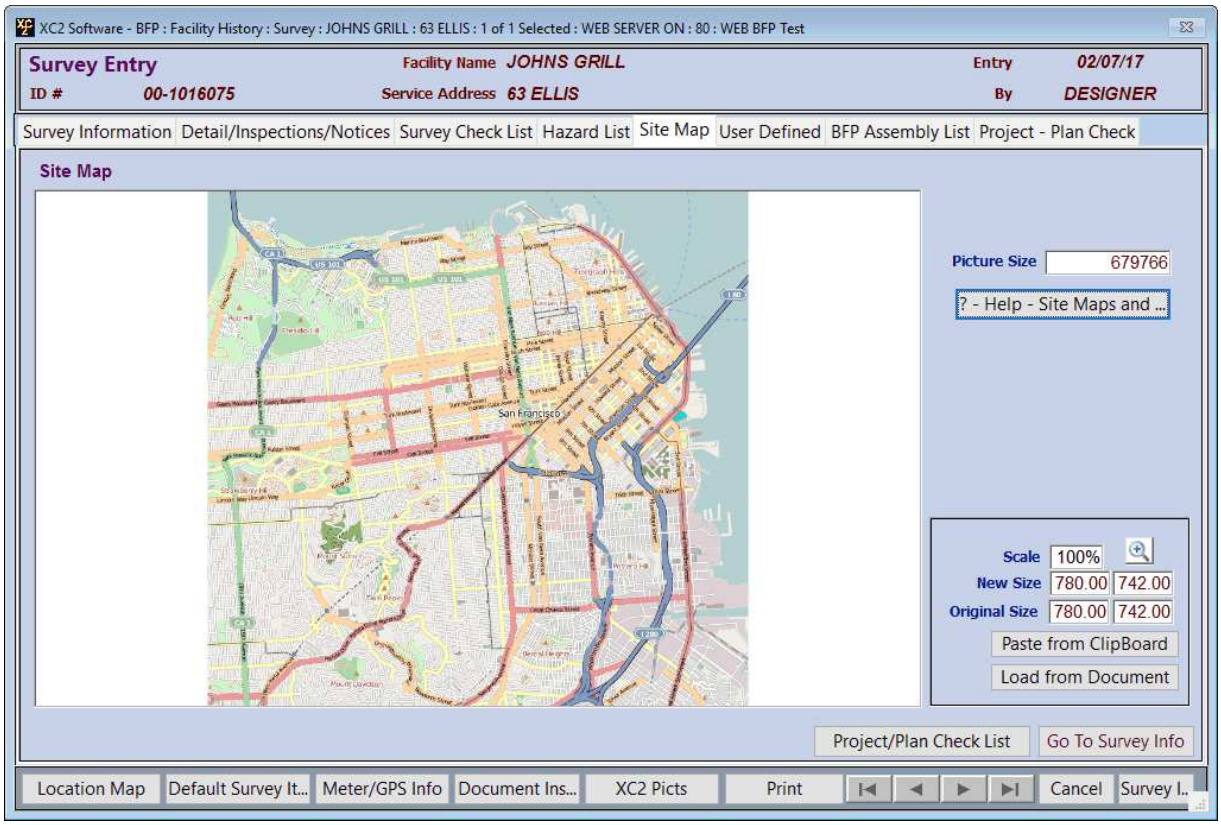
you can use the Hazards list tab to create a individual list of Hazards that can be printed out at a later time.



Notes:

Site Map

You may also include a Site Map

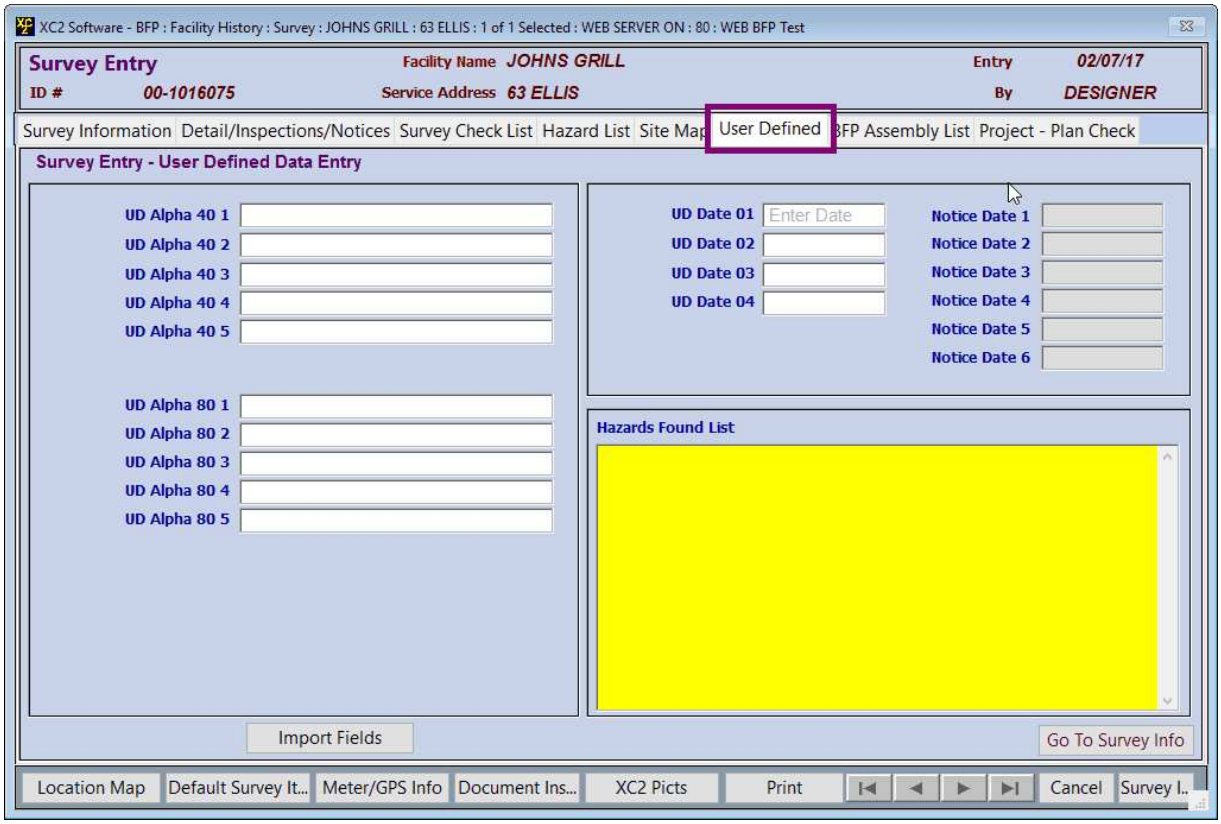


Notes:

User Defined

User Defined Fields are placed in this tab.

They are here for your convenience

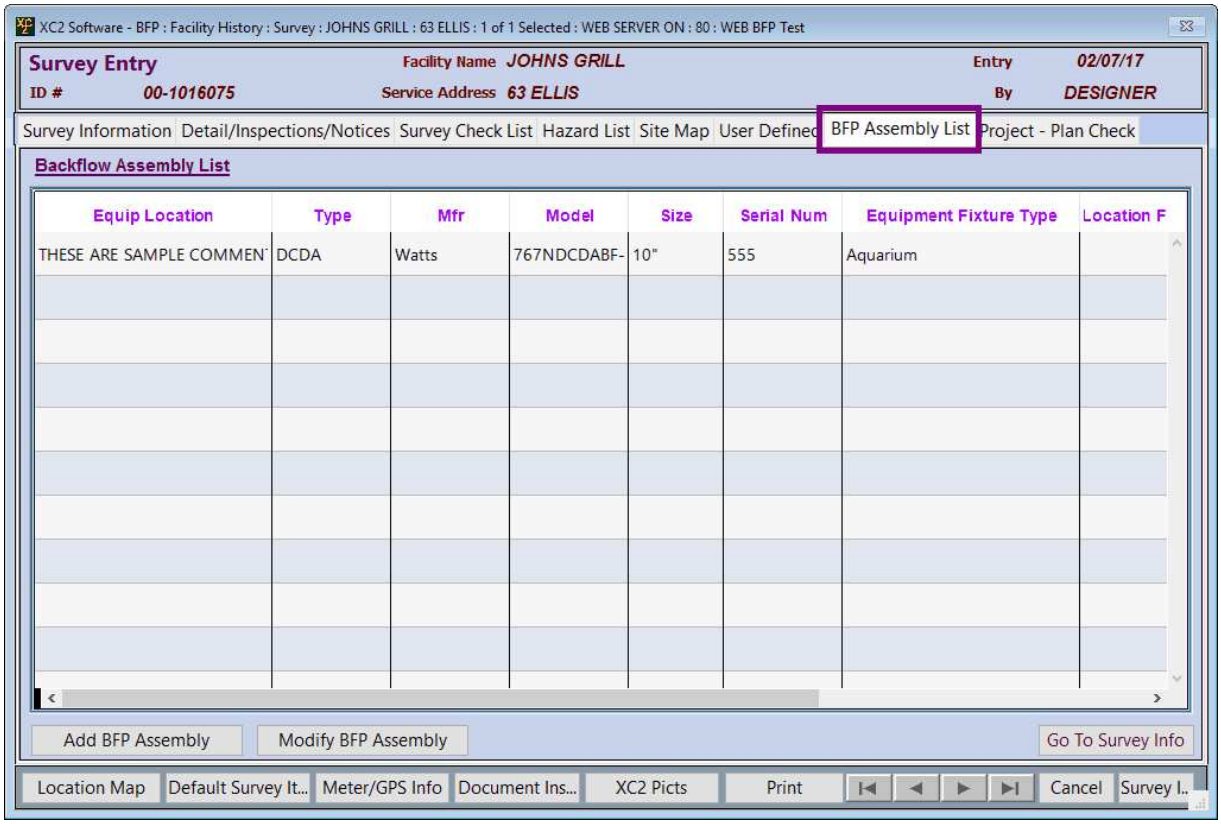


Notes:

Assembly List

This is a list of all assemblies that are installed at that location

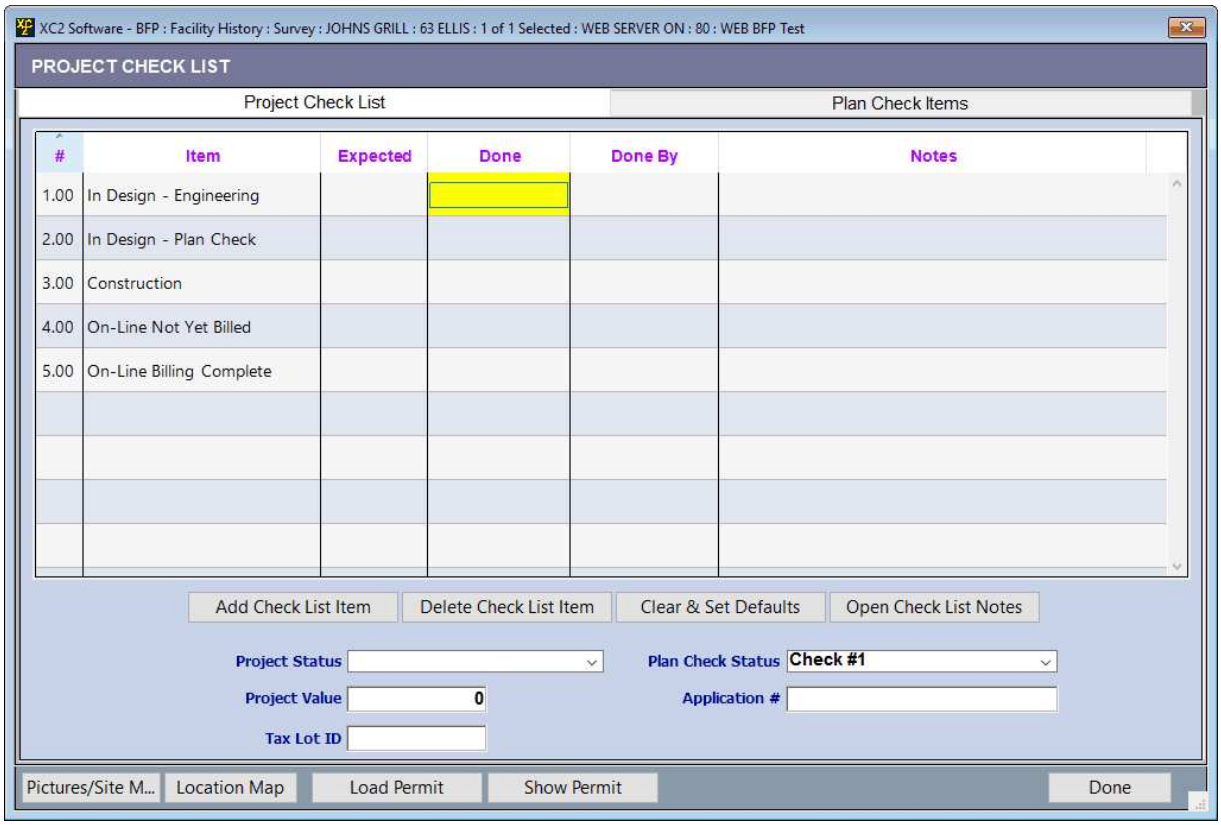
You may create or modify current assembly records



Notes:

Your Project Checklist

Lastly, this is your projects checklist



Notes:

XC2 Software Knowledge Base

Survey Entry From Facility

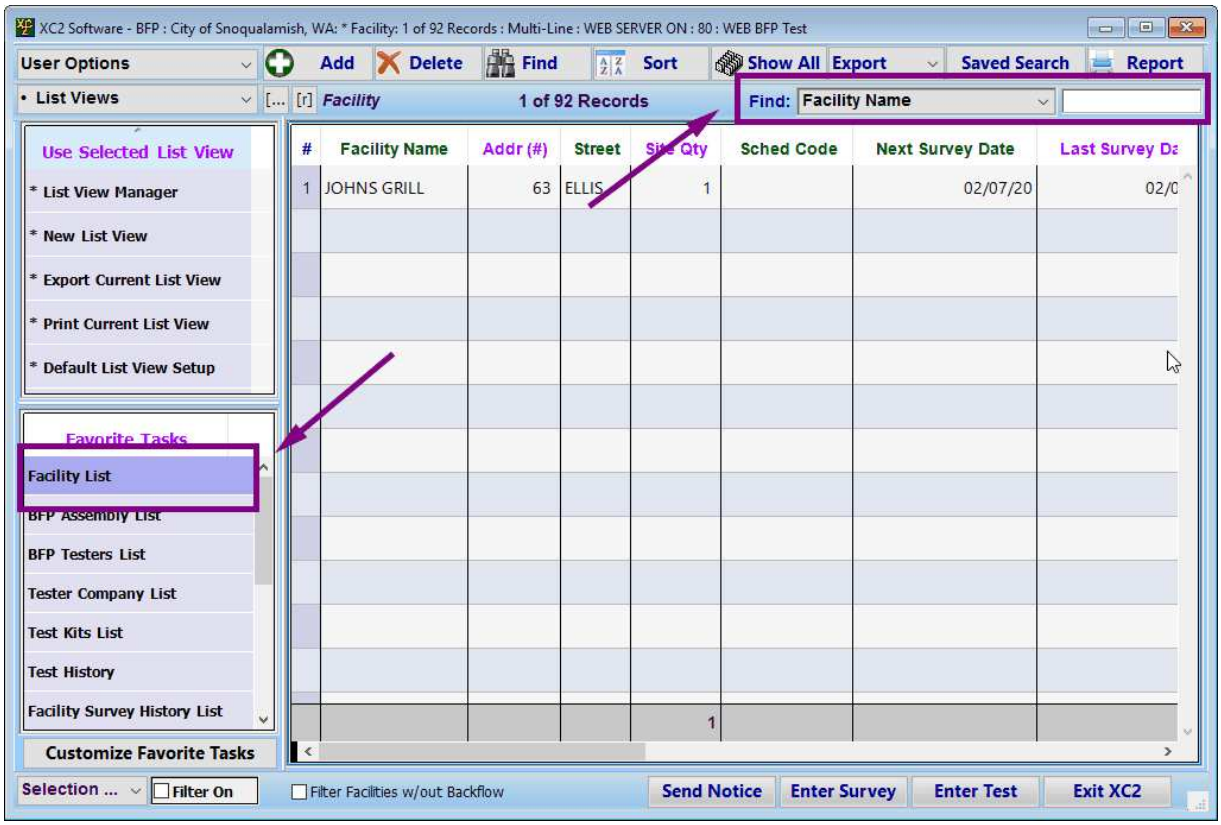
KB Asset ID: 3622

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

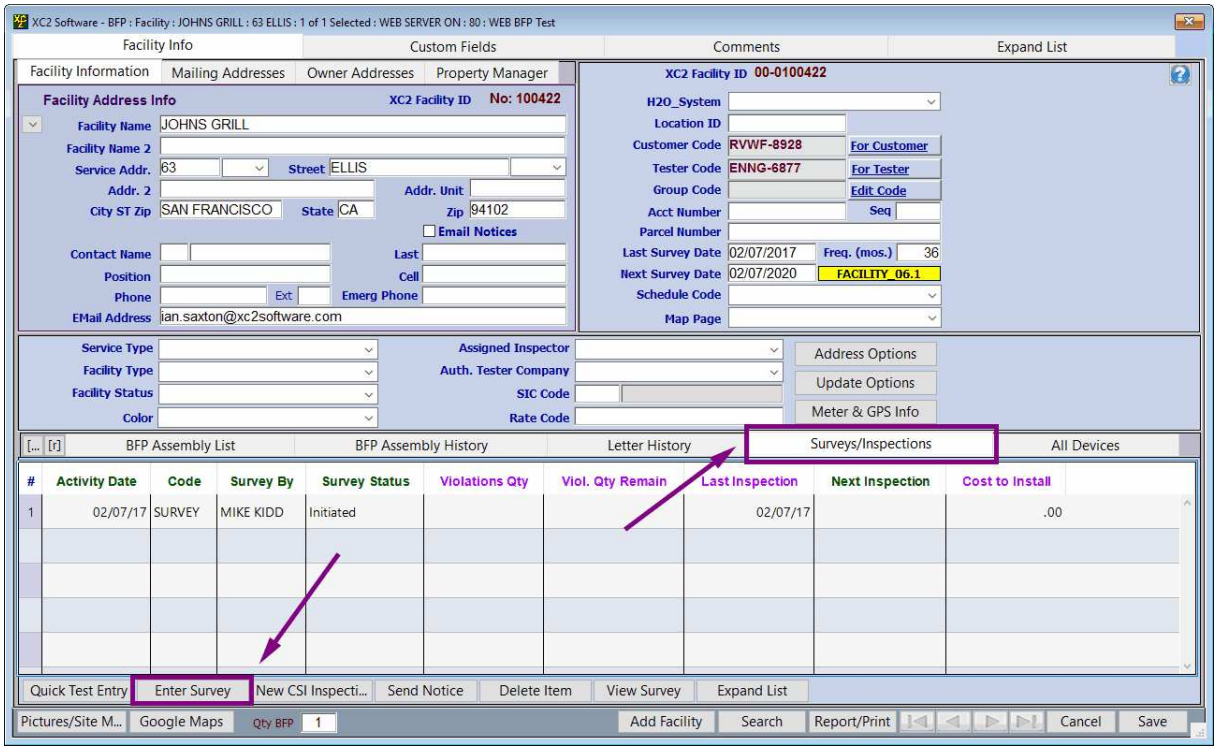


Notes:

Enter Survey

Click Survey/Inspections

Click Enter Survey



Notes:

Enter Basic Survey Information

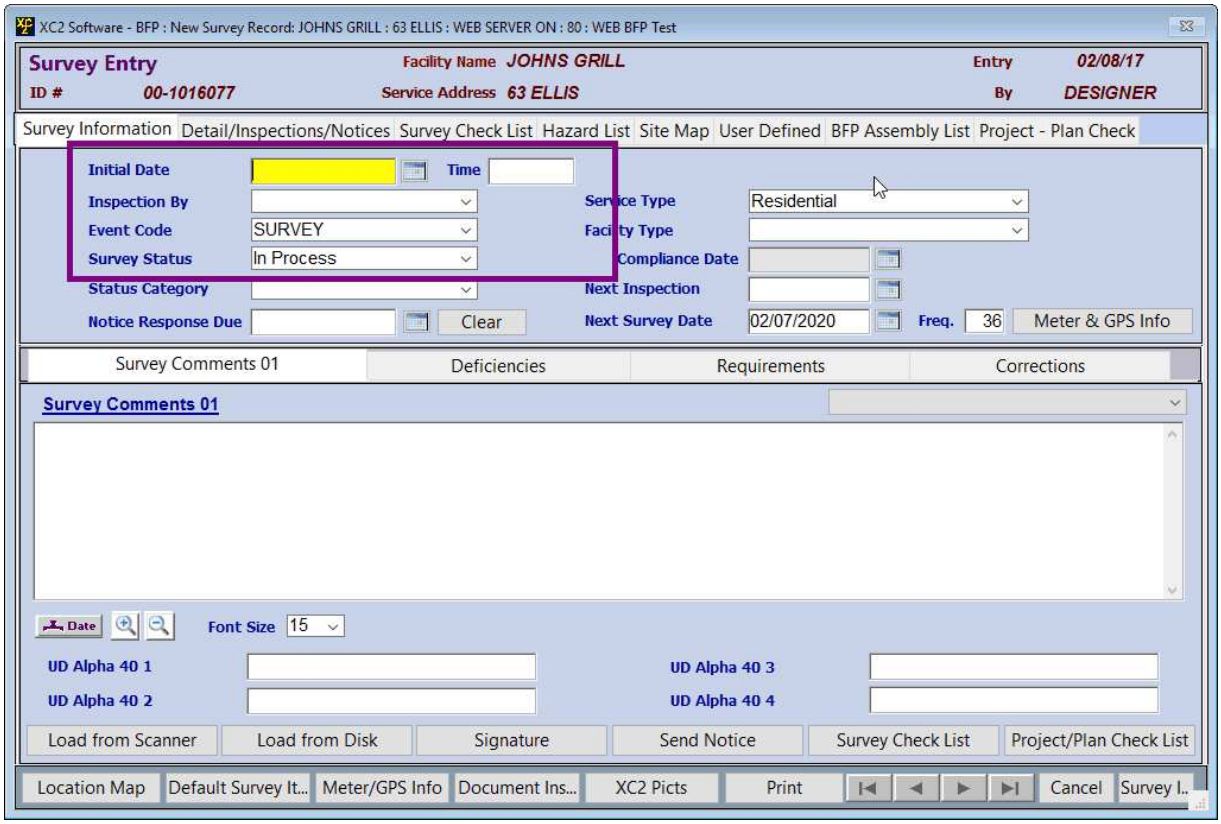
I like to start with the required basic information first

1) Inital 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 entery area.

You may keep it simple or basic. The idea is to create a record that can be potentially tracked so that you can easly identify facilities are in violation.

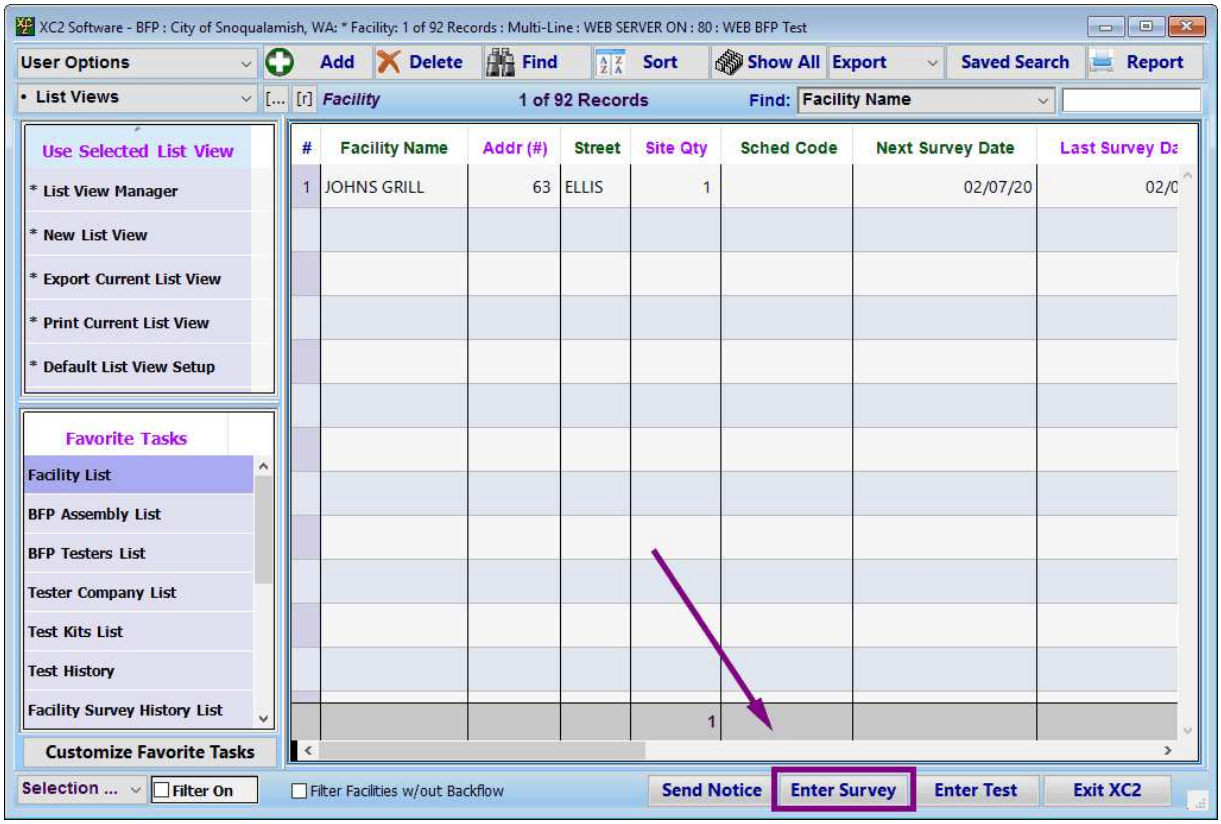


Notes:

Quick Survey Entry

You may also create a new survey record from XC2's Main Page

Click the Enter Survey button on the main page

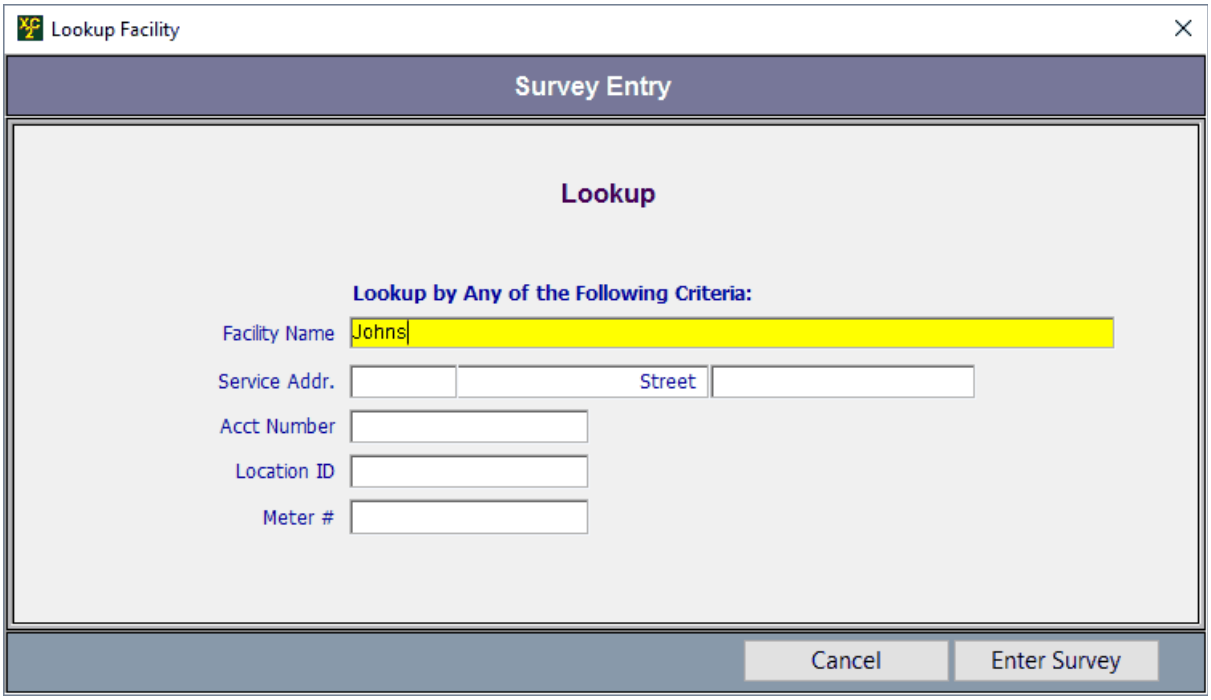


Notes:

Search For Facility

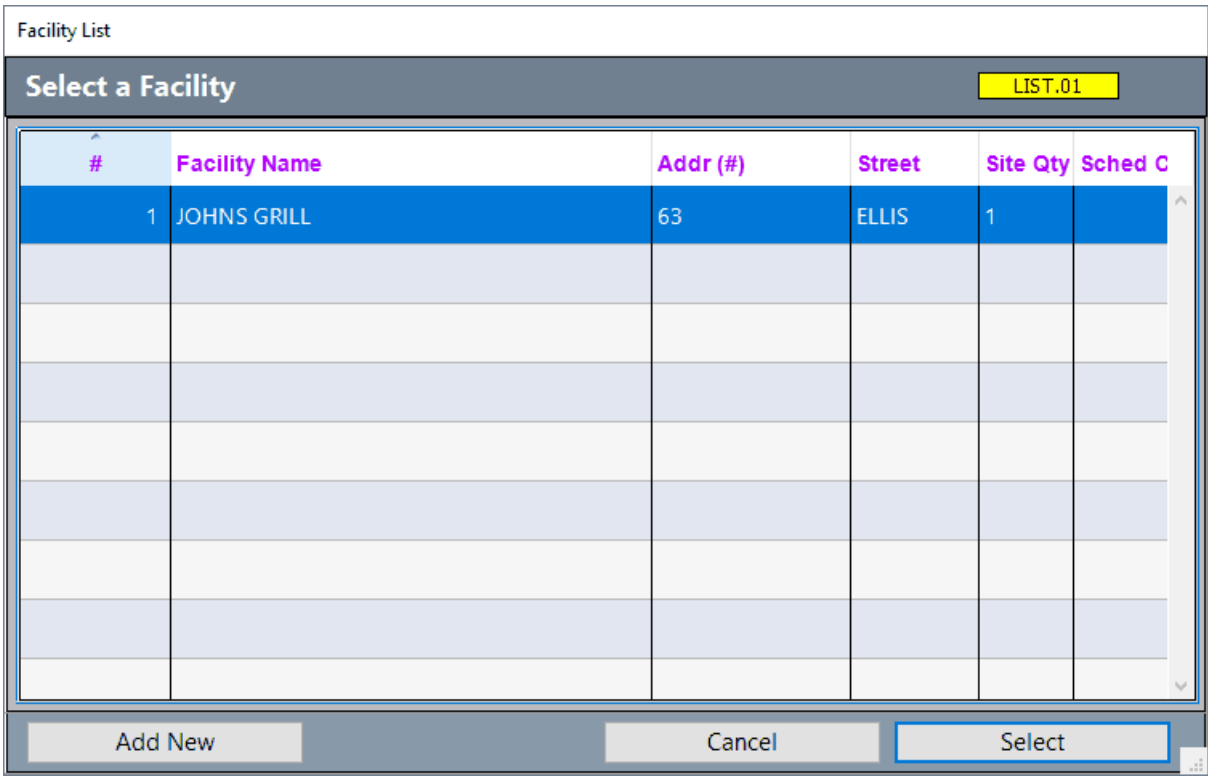
Search for the facility

Click Enter Survey



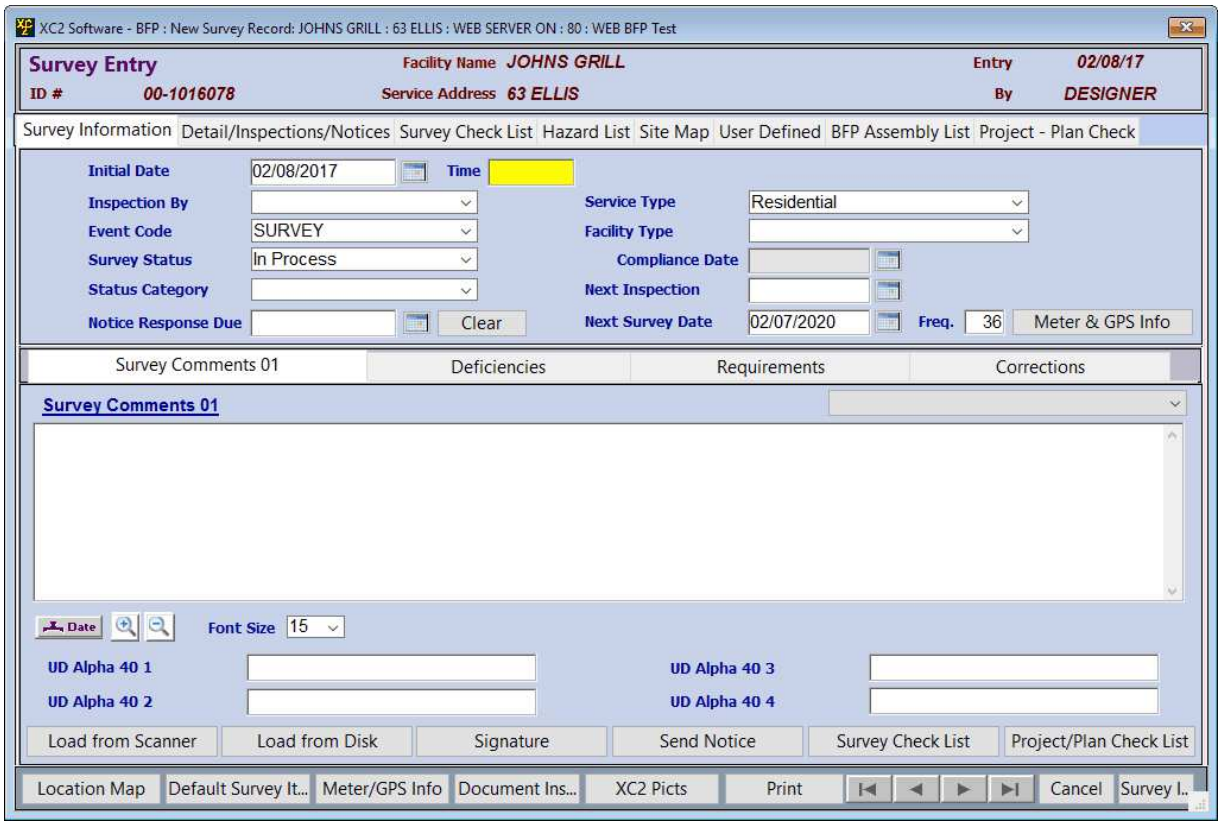
Notes:

Select Facility



Notes:

Enter Survey



Notes:

XC2 Software Knowledge Base

Creating Detailed Inspection Items

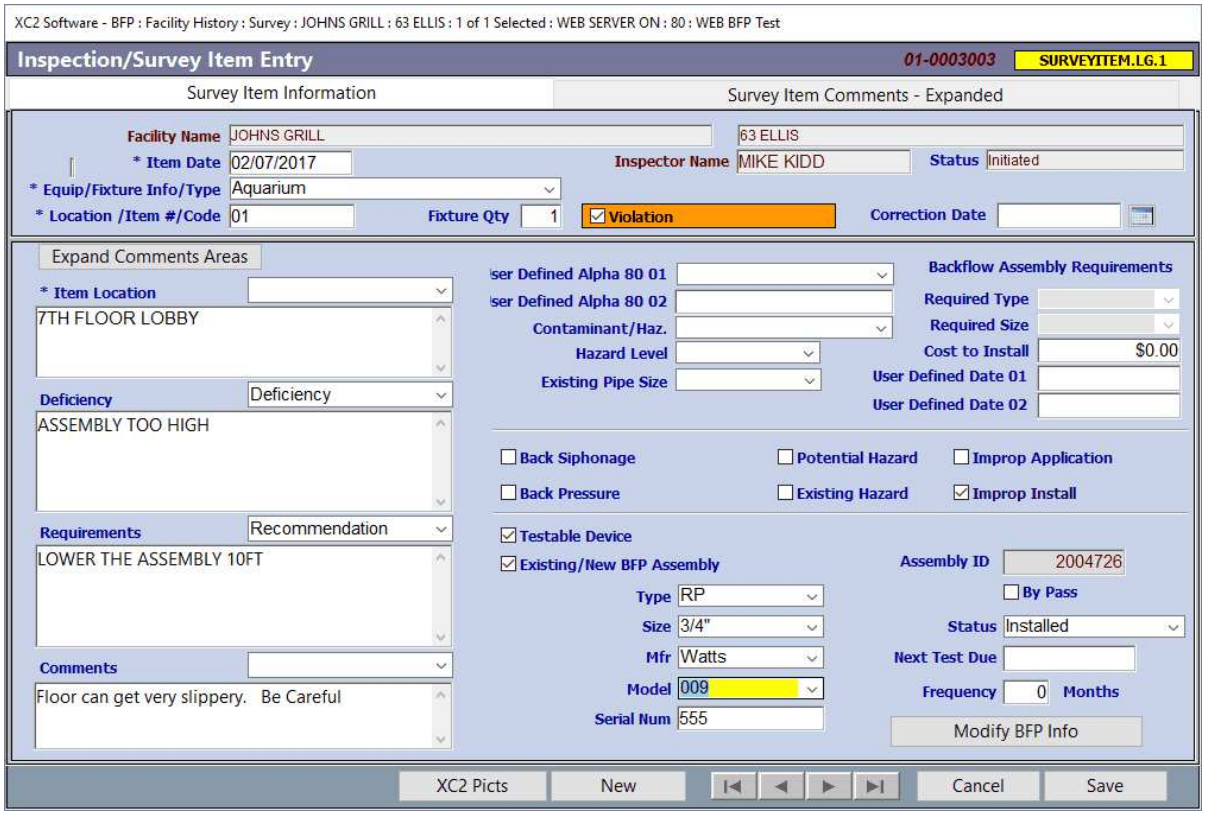
KB Asset ID: 3633

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 particully useful when inspecting in-premise cross connections.



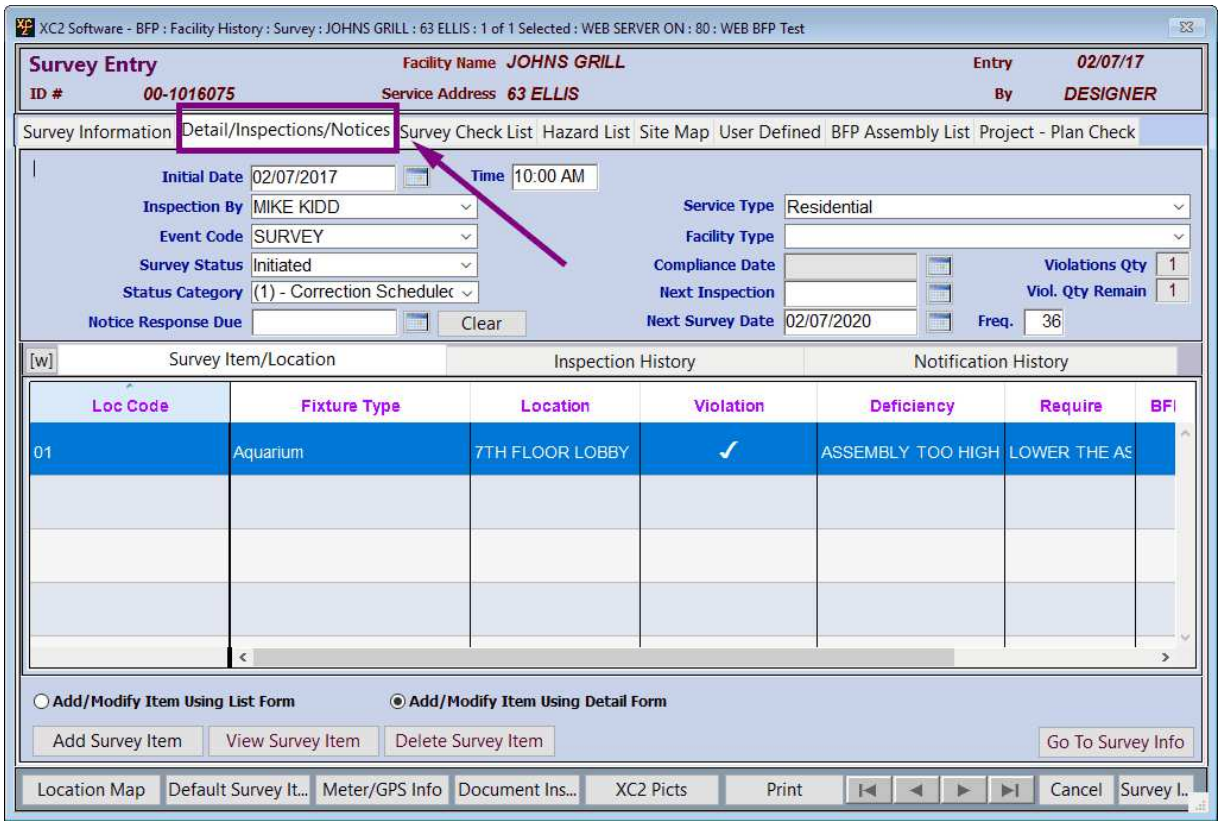
Notes:

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

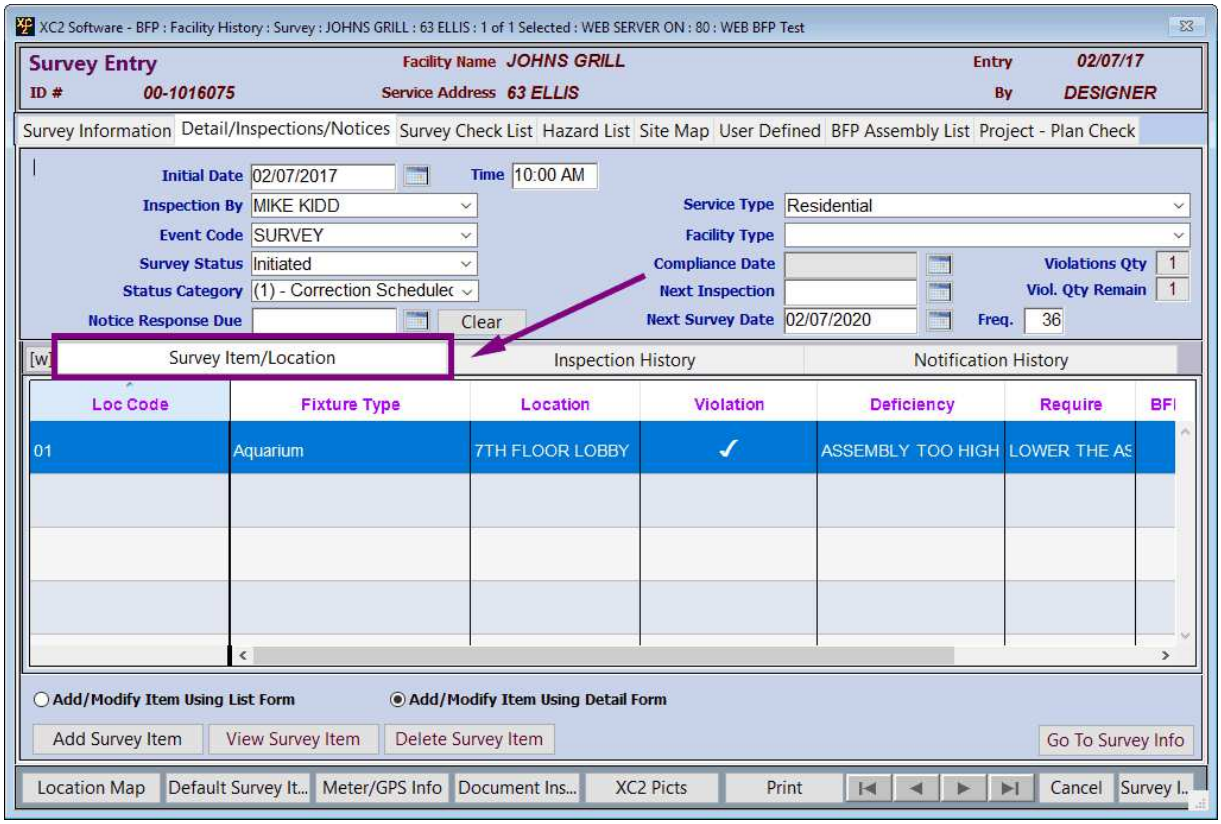


Notes:

Survey Item

The default Tab will show you all detailed Items that have been added

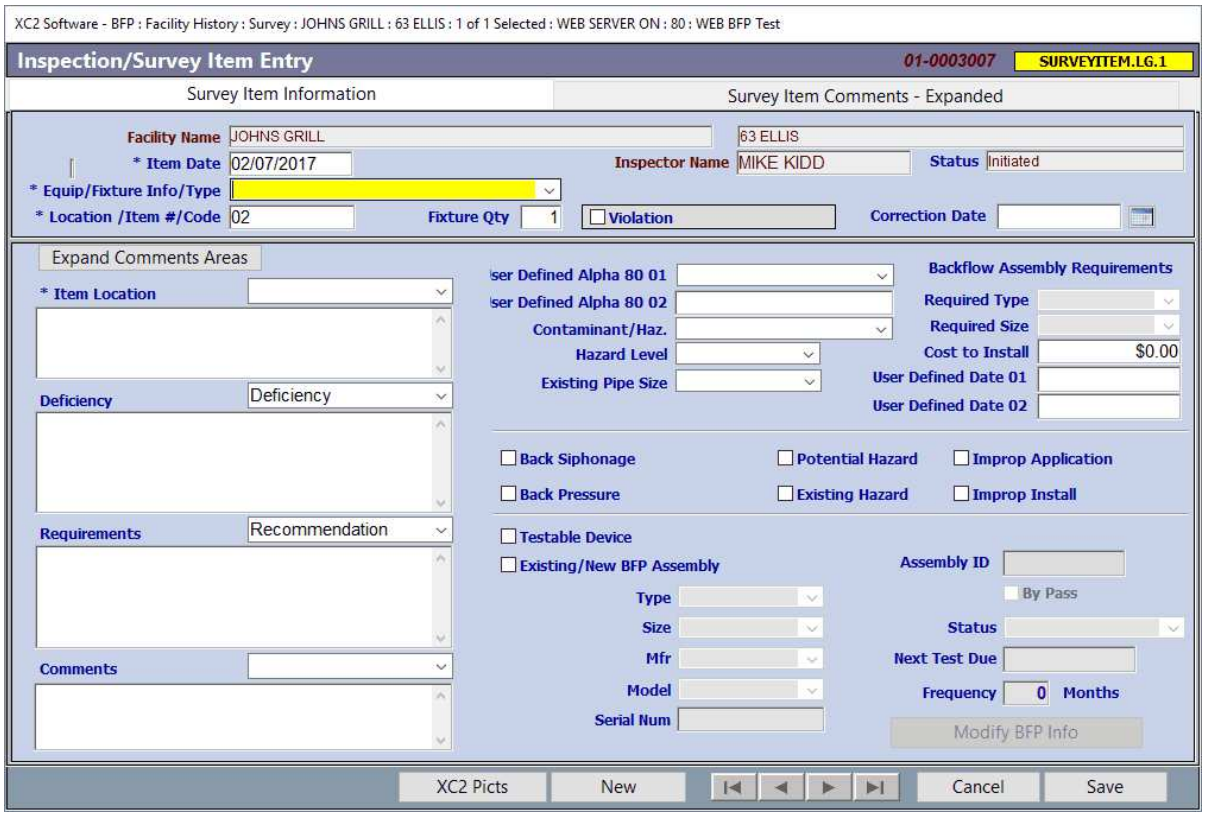
to Create a new Item Click Add Survey Item



Notes:

Blank Survey Item Screen

A blank survey item screen will appear

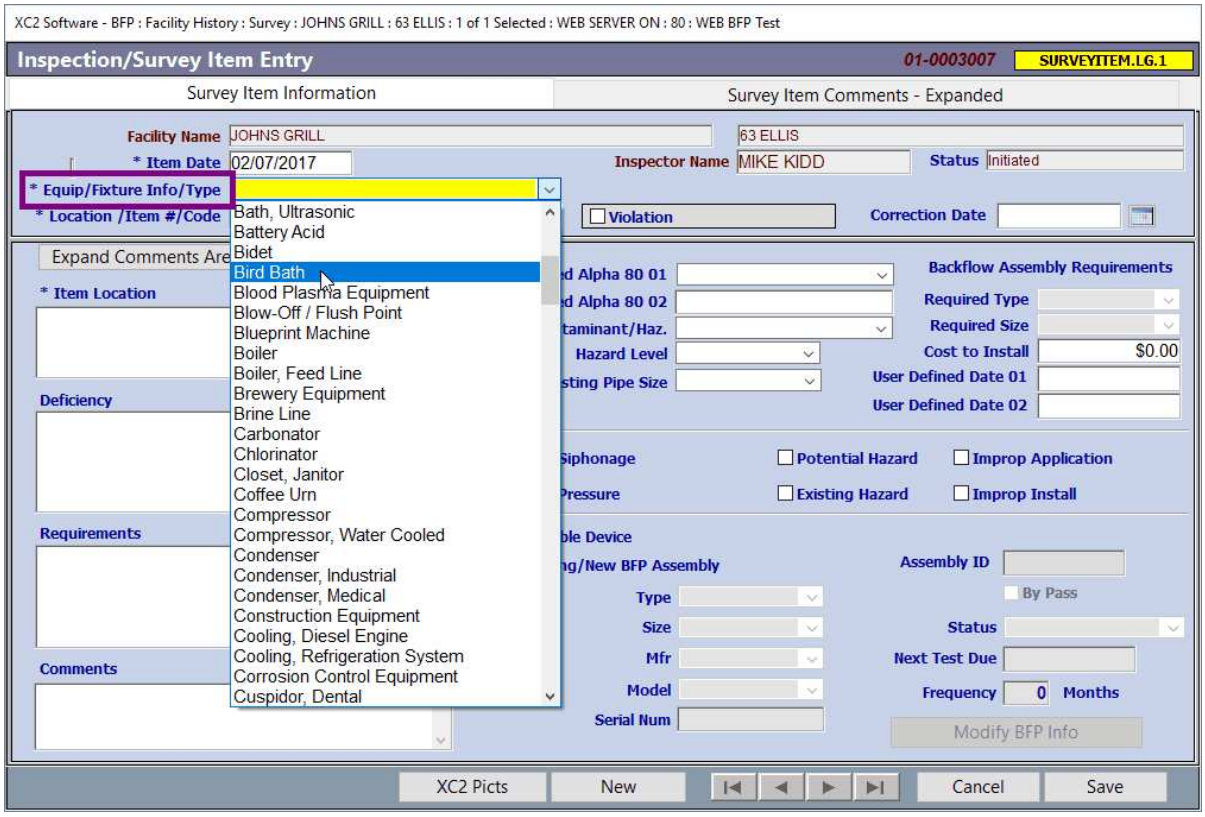


Notes:

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

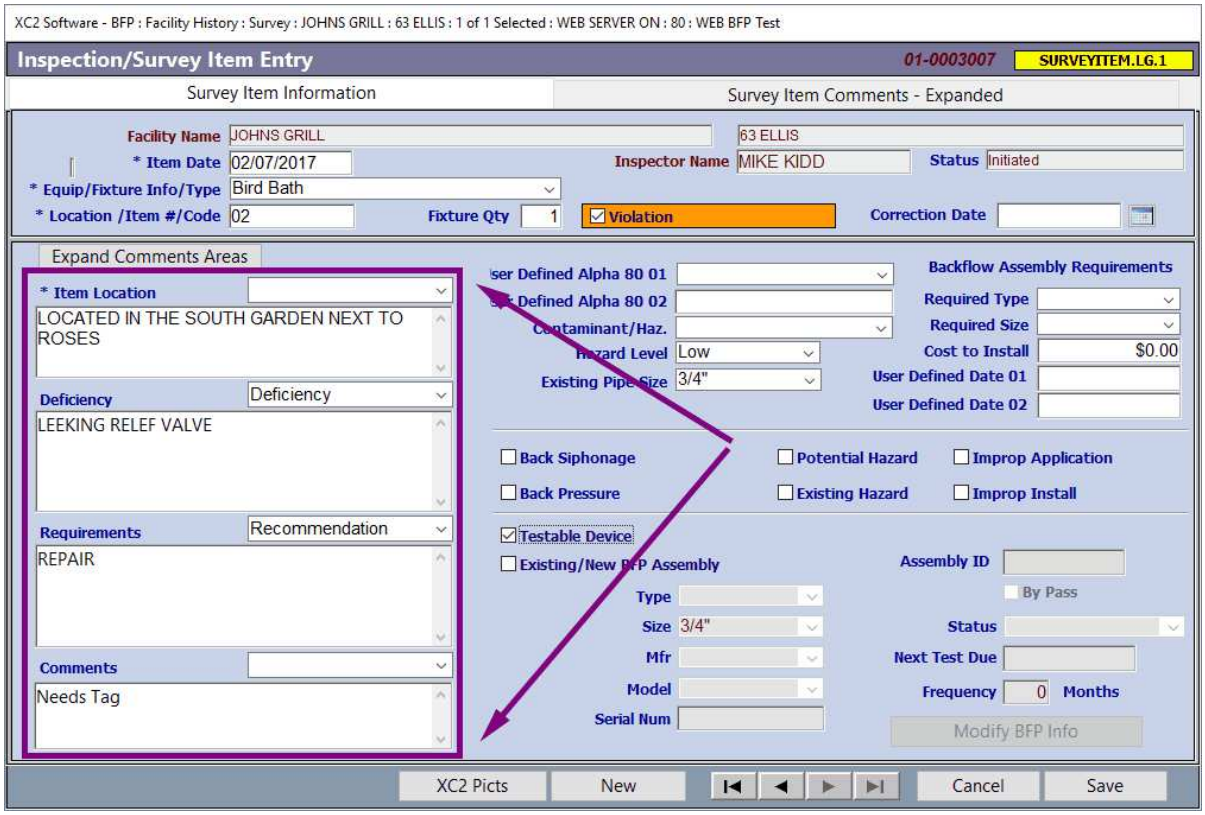


Notes:

Location / Comments / Deficiency / Requirements

Here you can enter the individual Items

location
Deficiency
Requirements
Comments



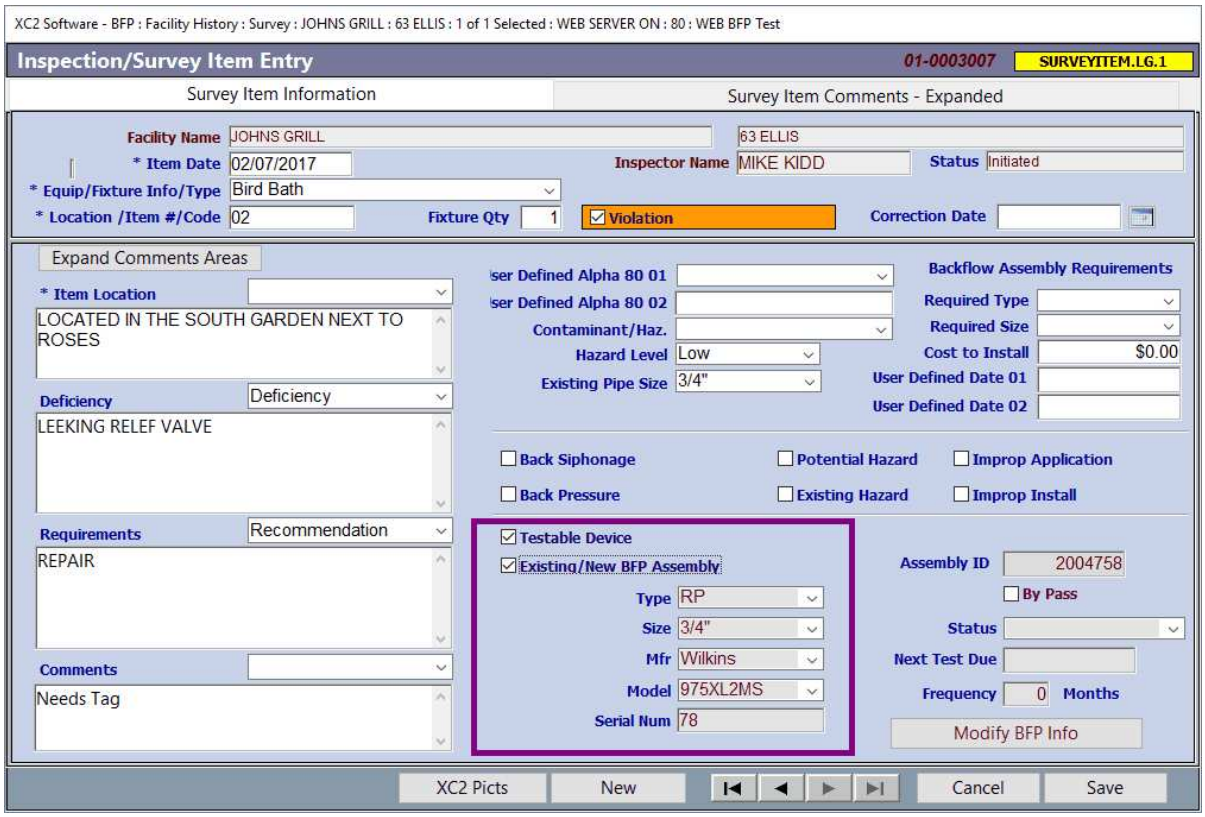
Notes:

Device Information

If there is a backflow assembly at the location

you can choose the type here

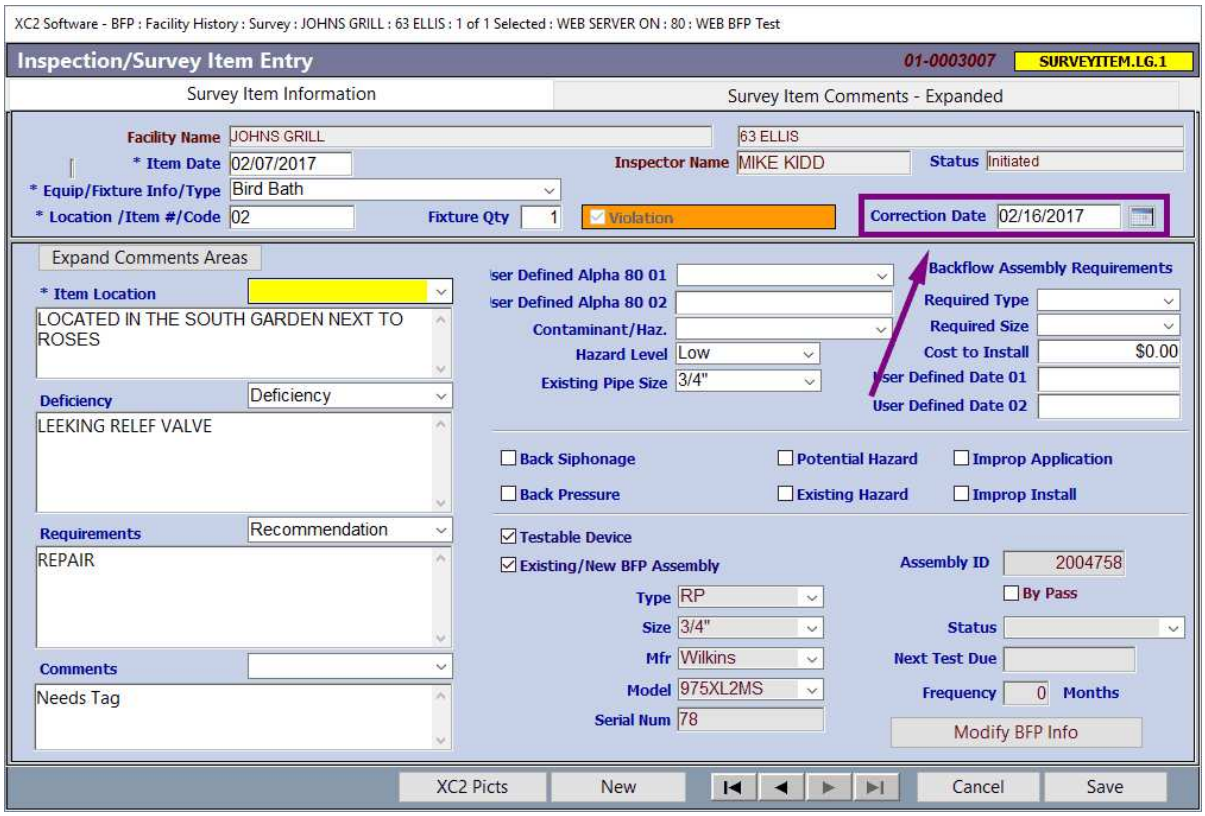
Click the checkbox to choose the existing device information



Notes:

Closing the Item

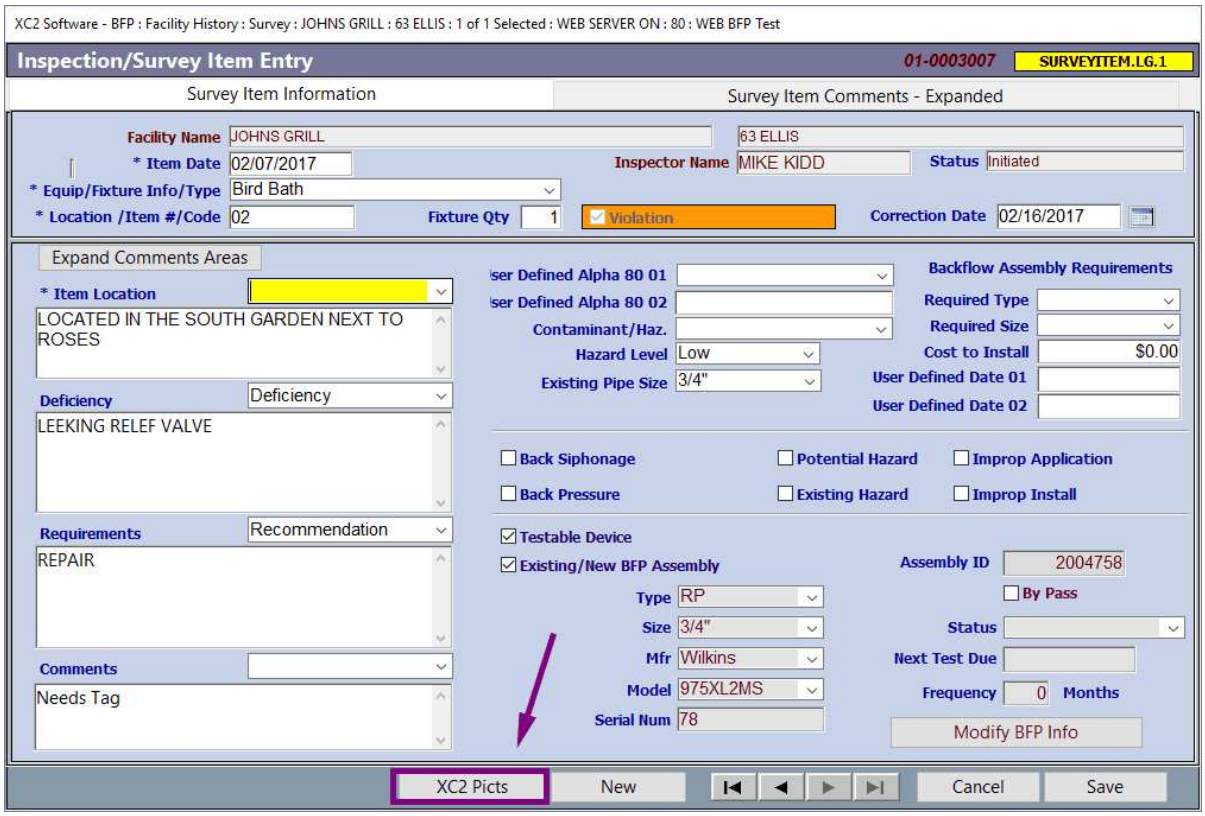
If the repairs or the requirements have been met, enter a correction date to close the issue.



Notes:

Adding a Picture

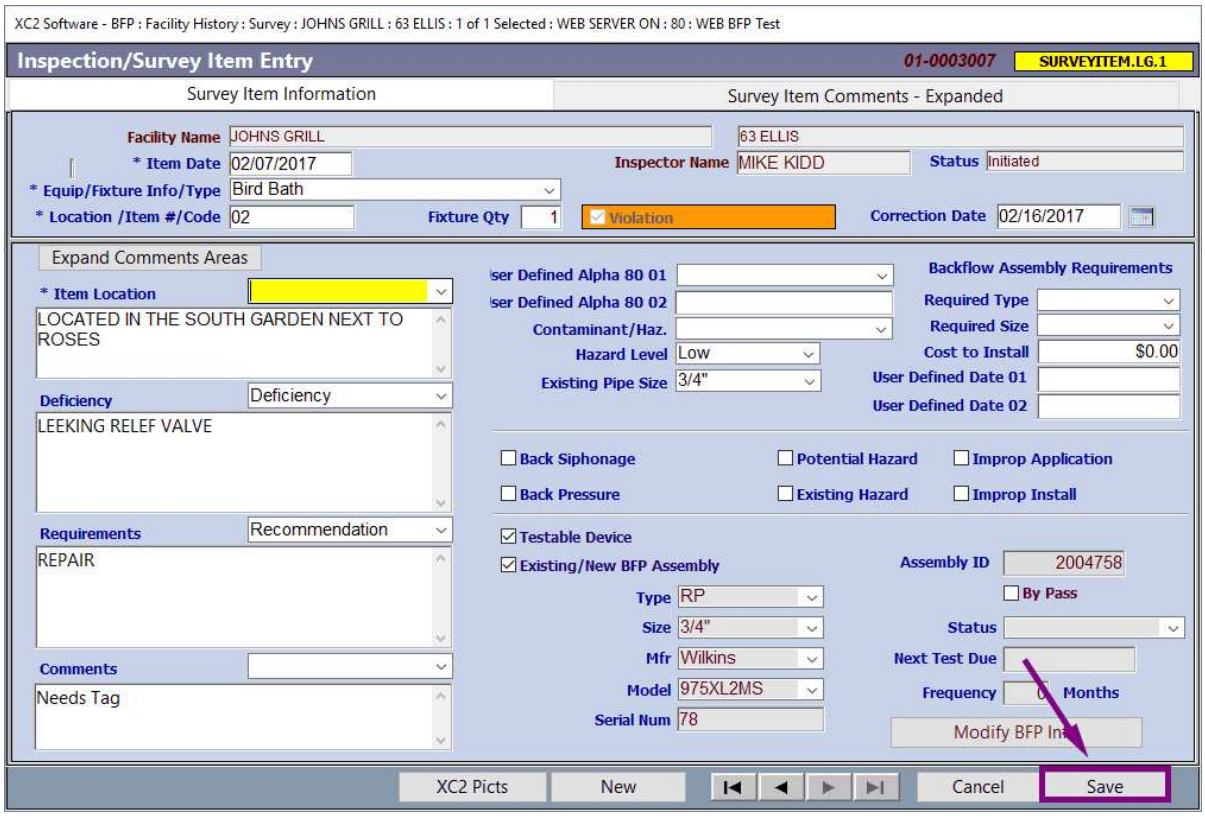
You can also add a picture of the Item



Notes:

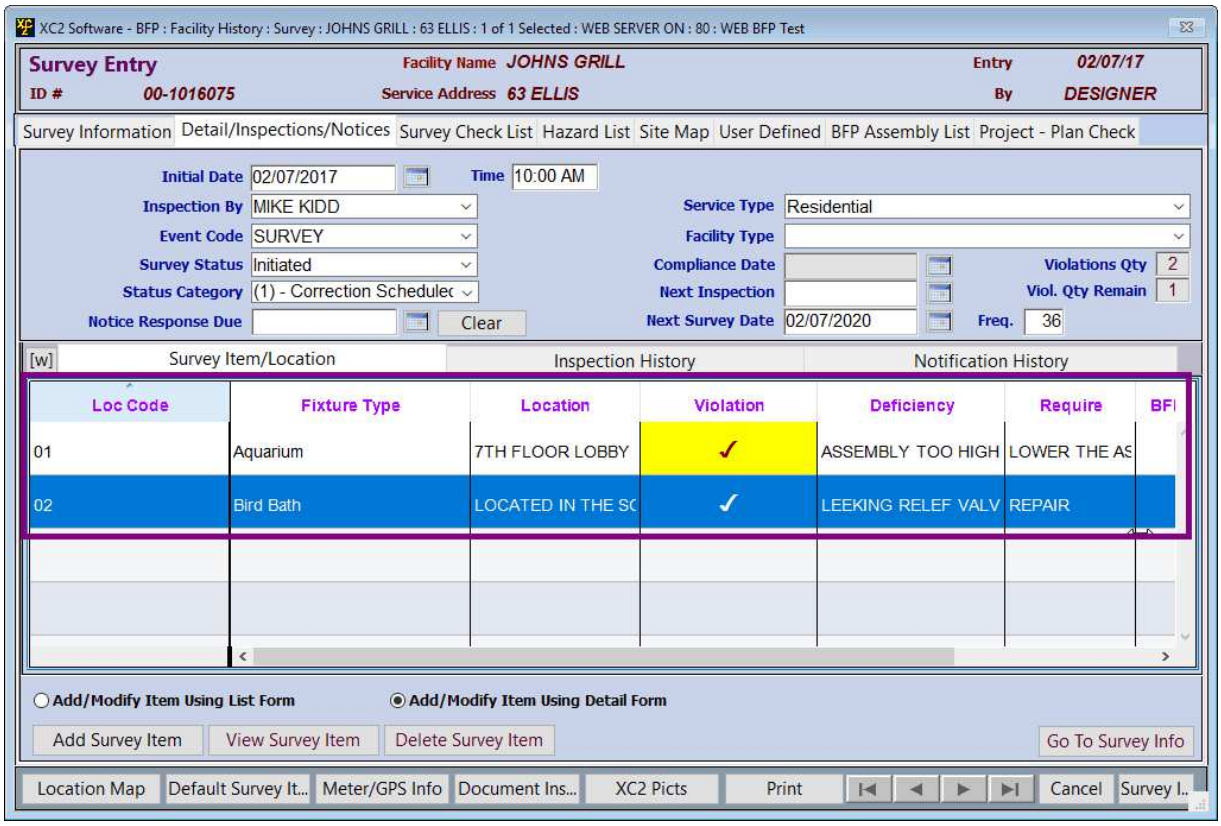
Review

Save your Detailed Item when you are finished



Notes:

Item will be added



Notes:

XC2 Software Knowledge Base

How to Complete a Survey

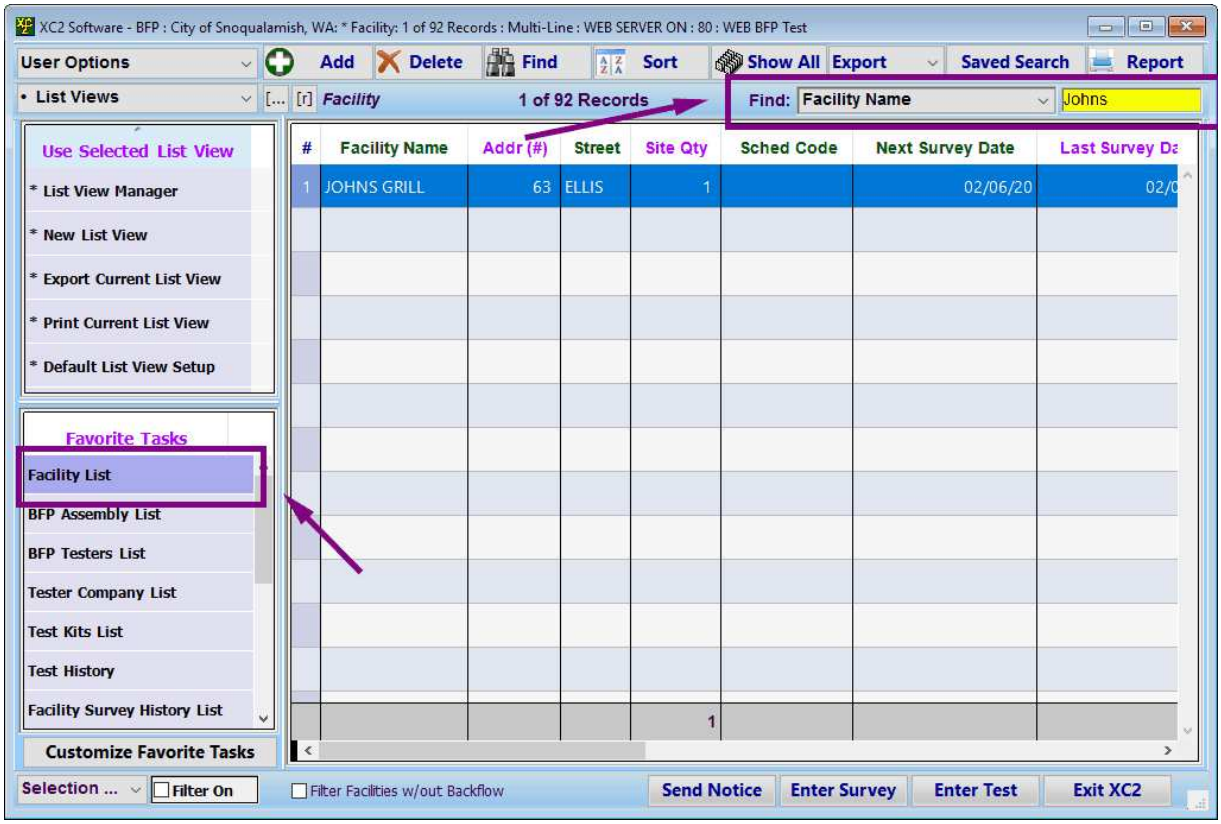
KB Asset ID: 3619

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

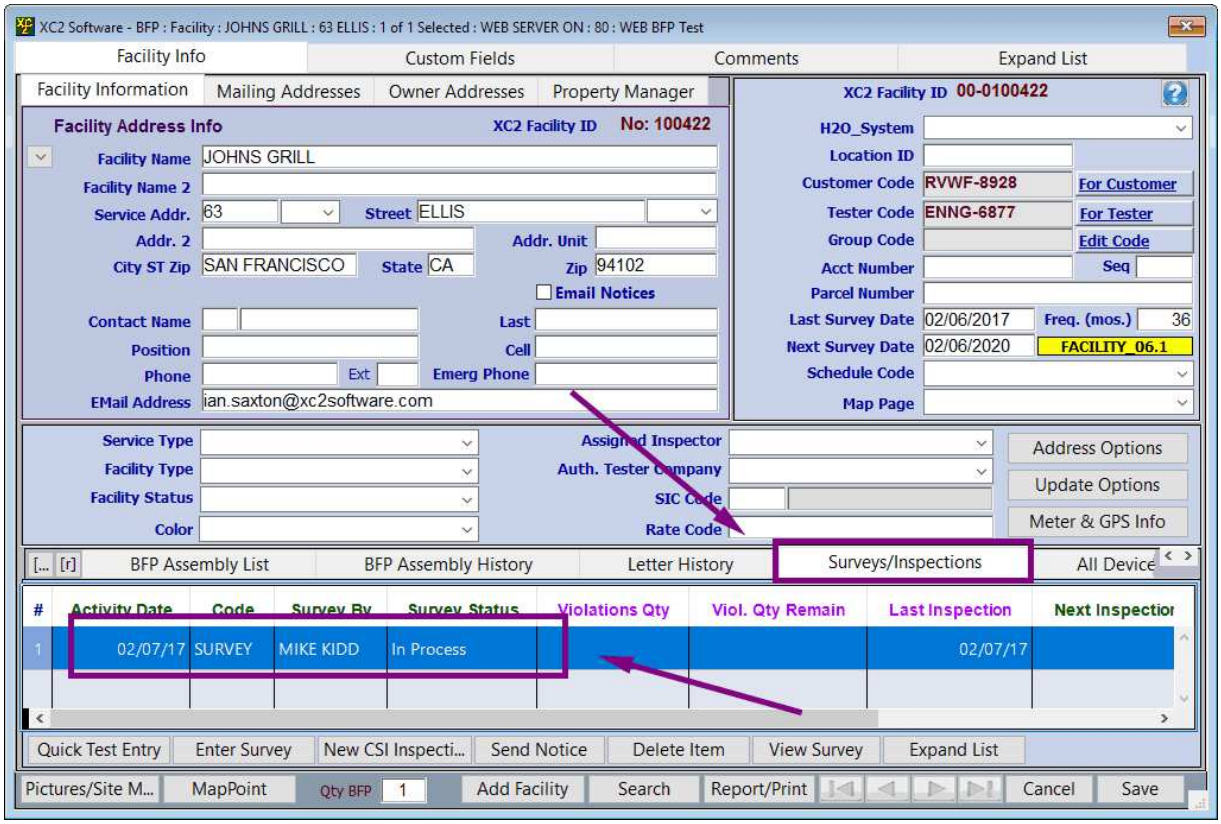


Notes:

Survey History

Click on the facility survey history tab

double click on the survey that you would like to close



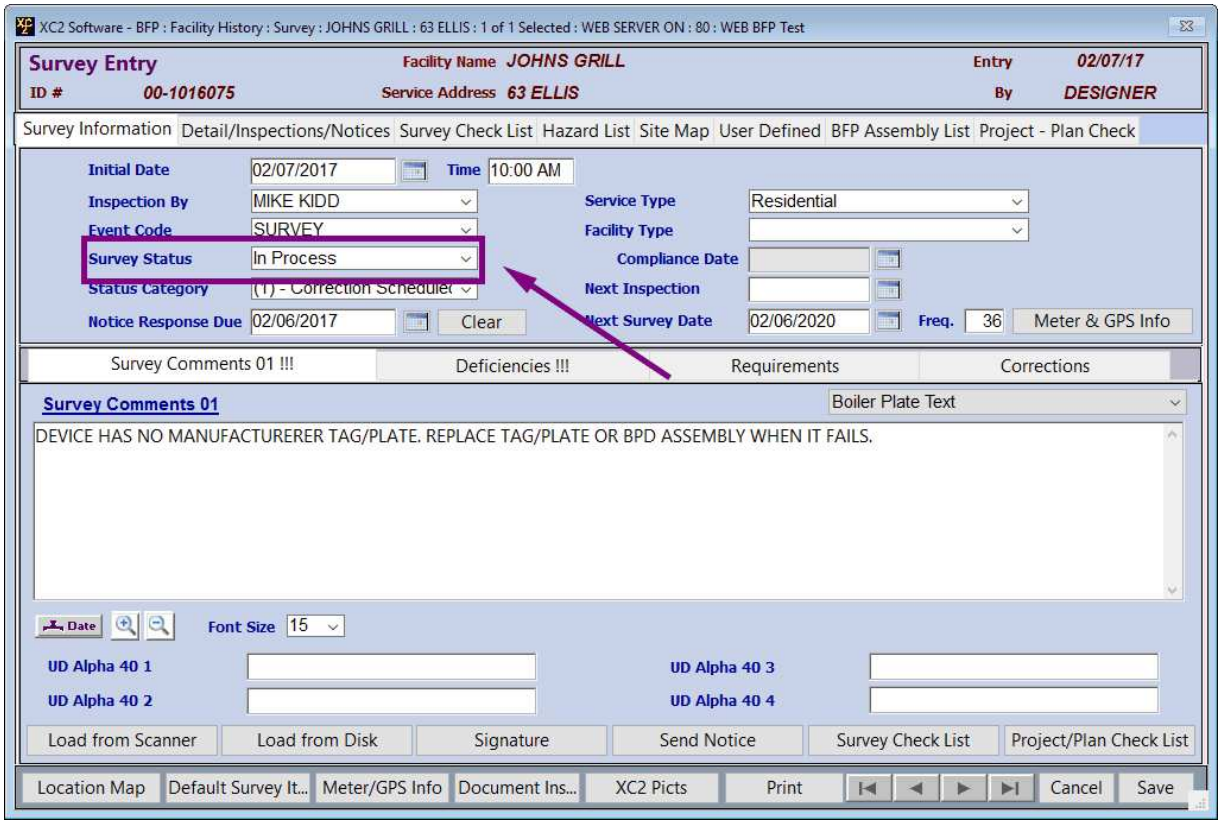
Notes:

Survey Status

Survey status

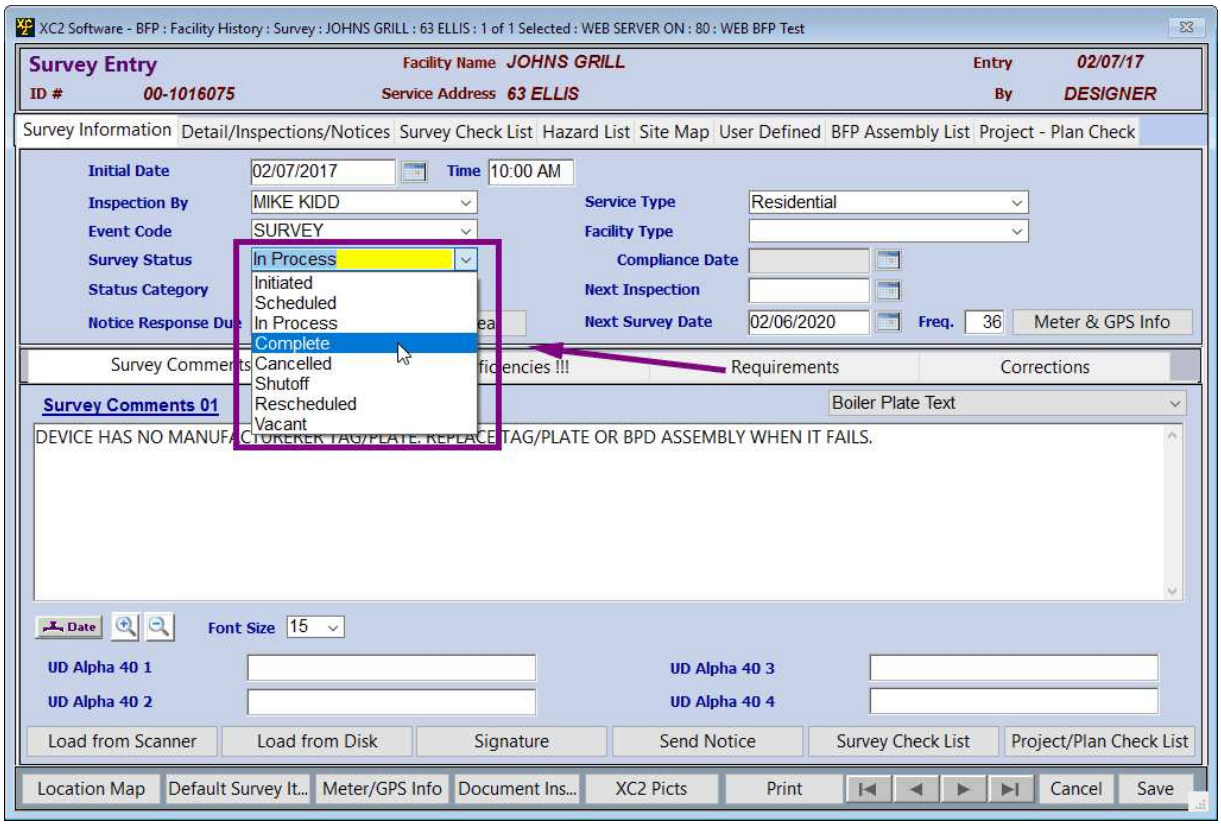
If the Survey status is marked complete. XC2 will close the survey by clearing any survey response dates and reset the next survey date.

To change the survey status click the survey status pulldown menu.



Notes:

Select Complete



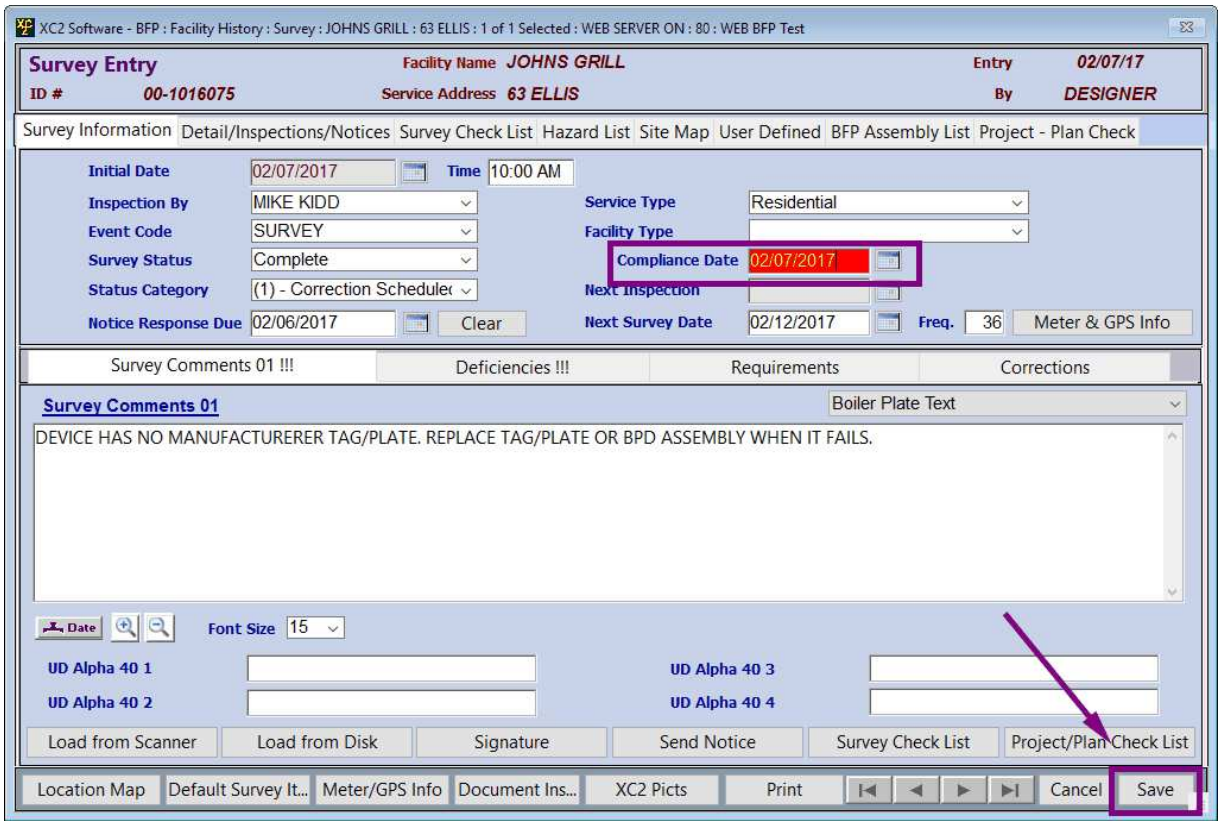
Notes:

Compliance Date

After Closing the Survey Record, the compliance date will be created.

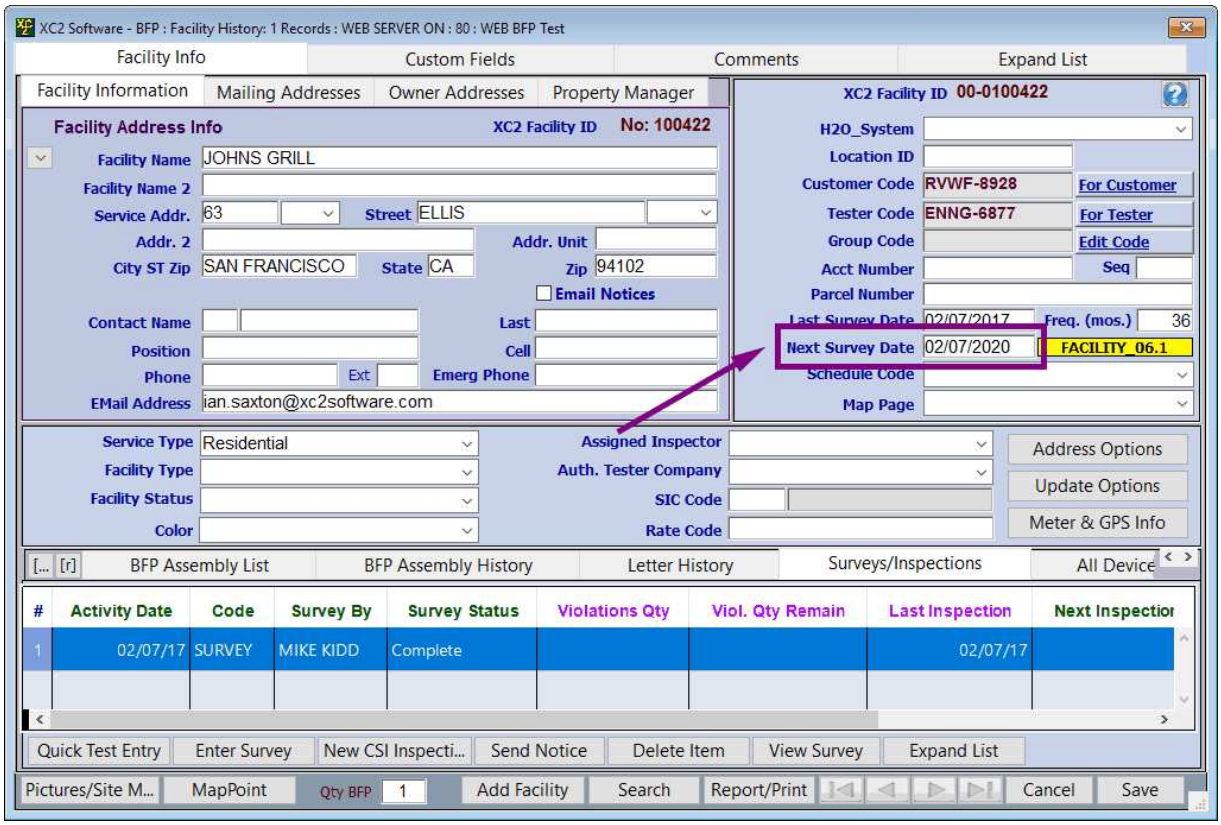
Confirm that the compliance date is correct

Click save when you are finished



Notes:

Next Survey date will change



Notes:

XC2 Software Knowledge Base

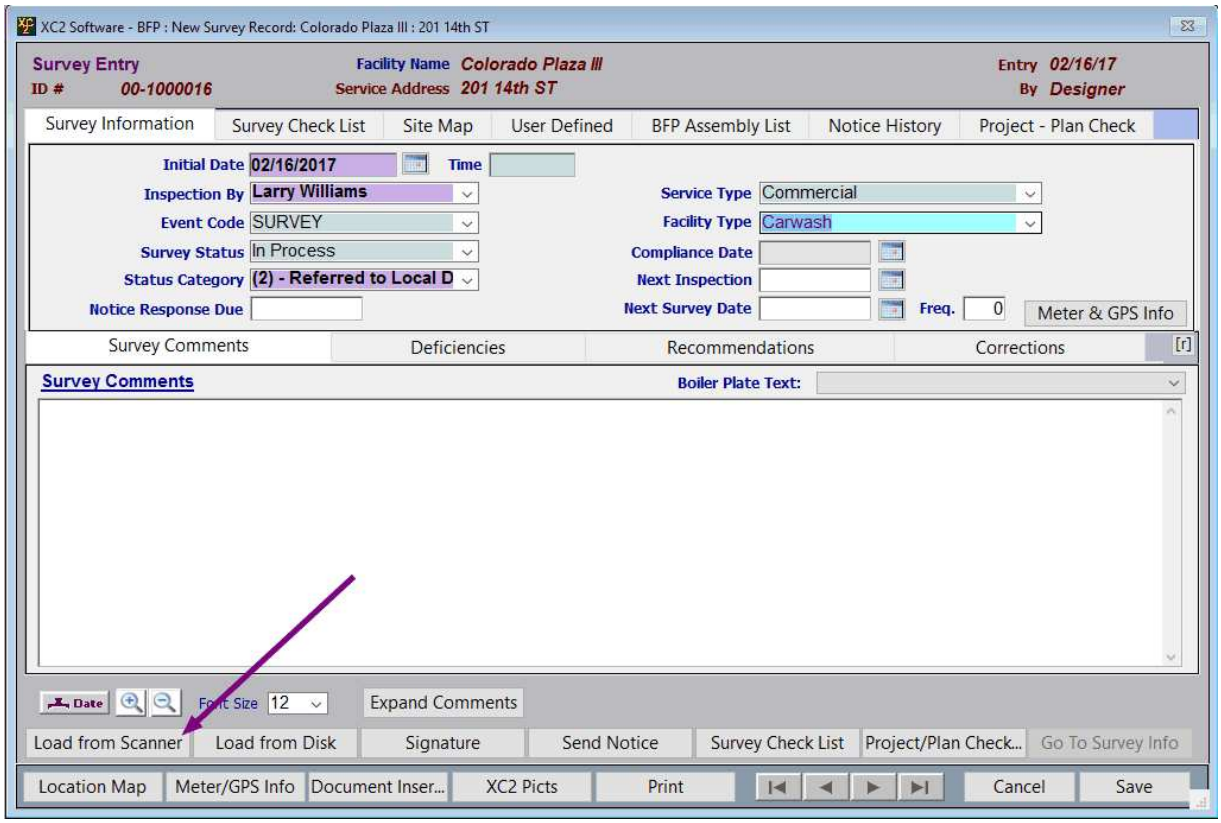
How Scan Your Image Or Document Into A Survey Record

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

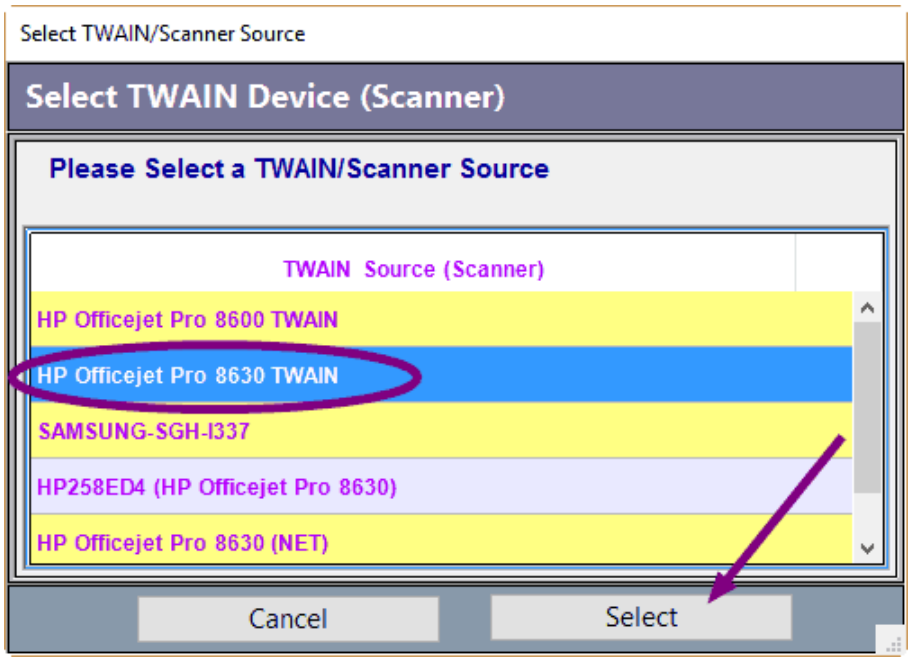
Load from scanner



Notes:

Select Your Twain Enabled Device

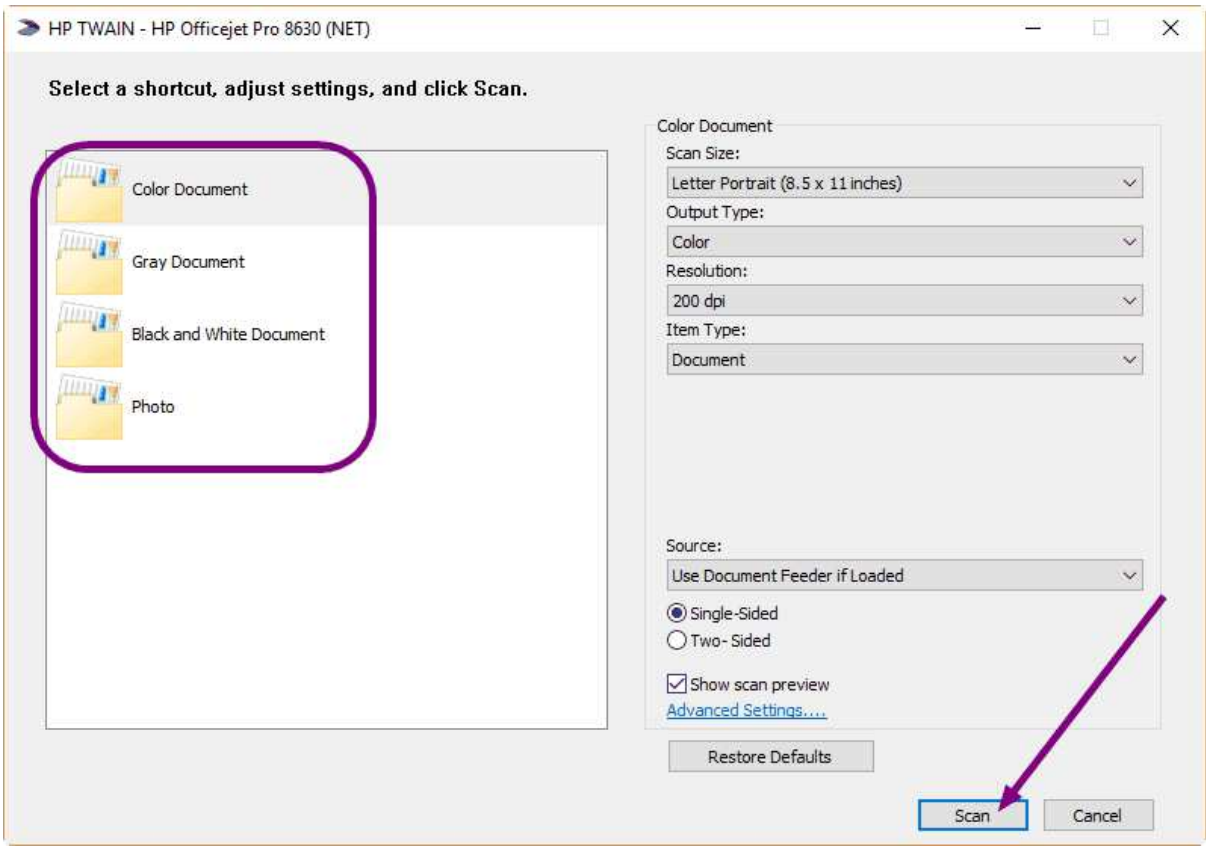
Click Select



Notes:

Select the Scan Preference

Click Scan

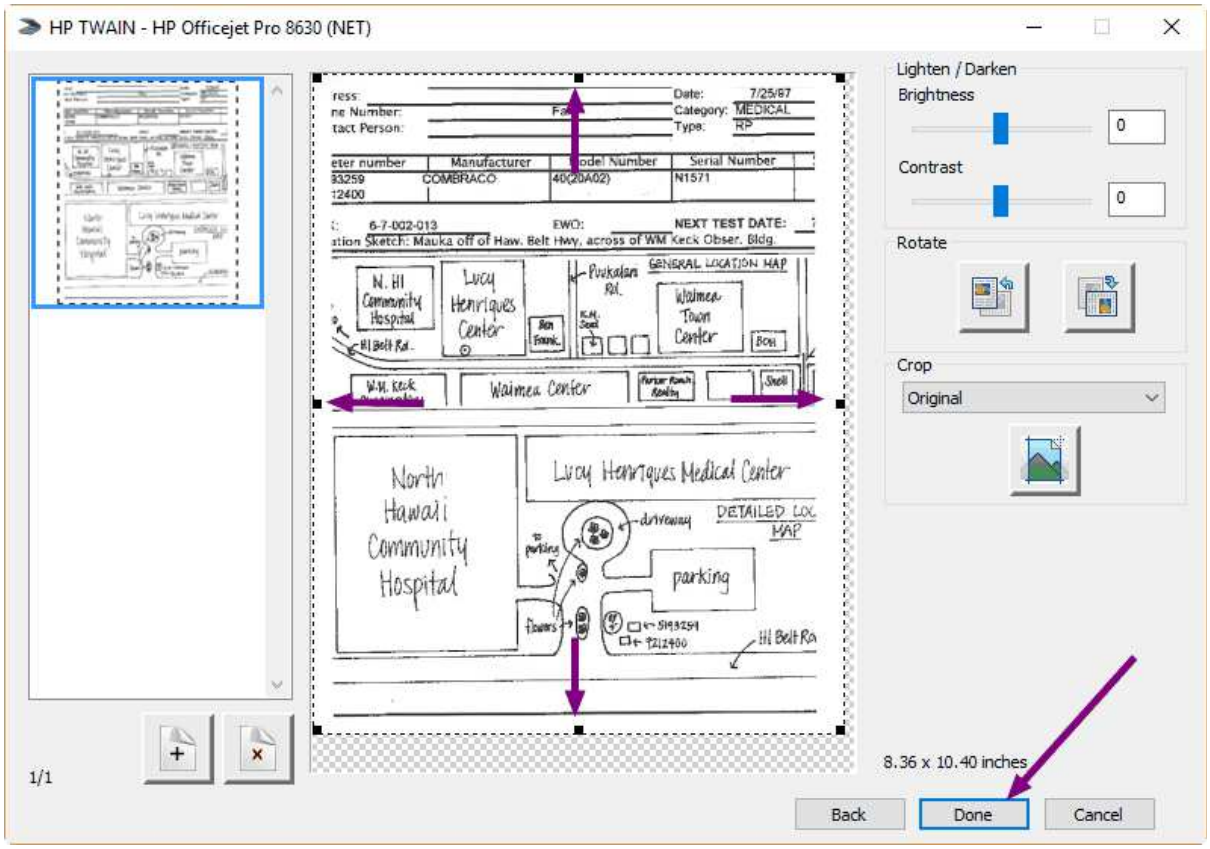


Notes:

Resize and Scan

Yu can resize the area to be scanned

When ready, Click Done

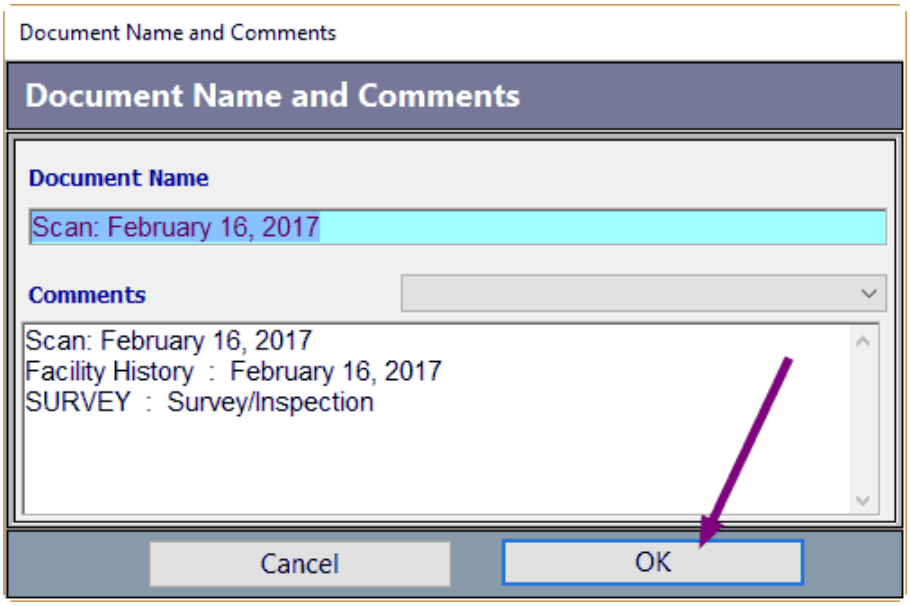


Notes:

Document Name

You can edit the documetn name and enter comments.

Click OK

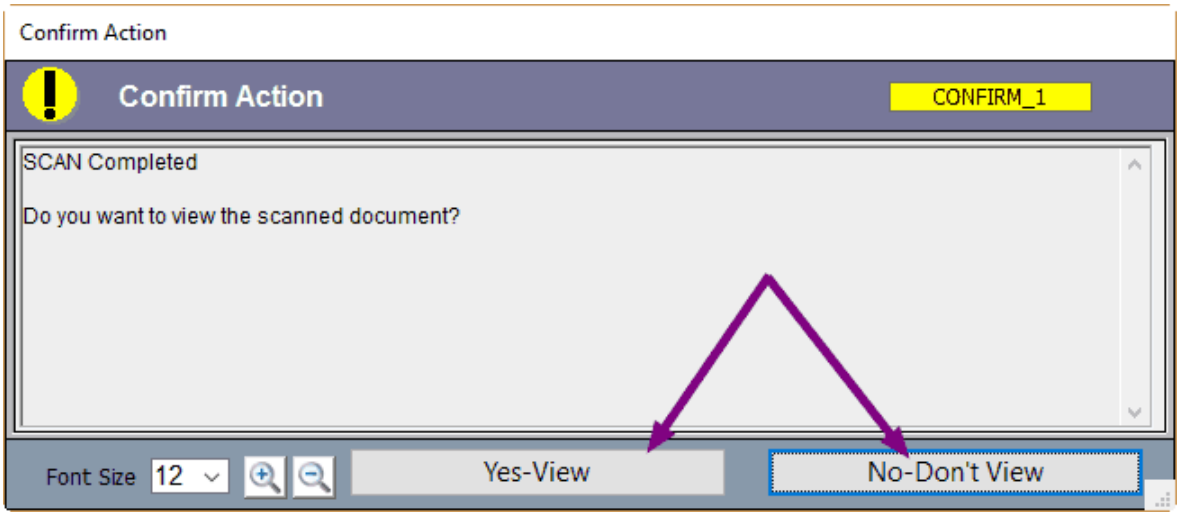


Notes:

Complete the Import

Your image has been imported

You can choose to view the document or not



Notes:

XC2 Software Knowledge Base

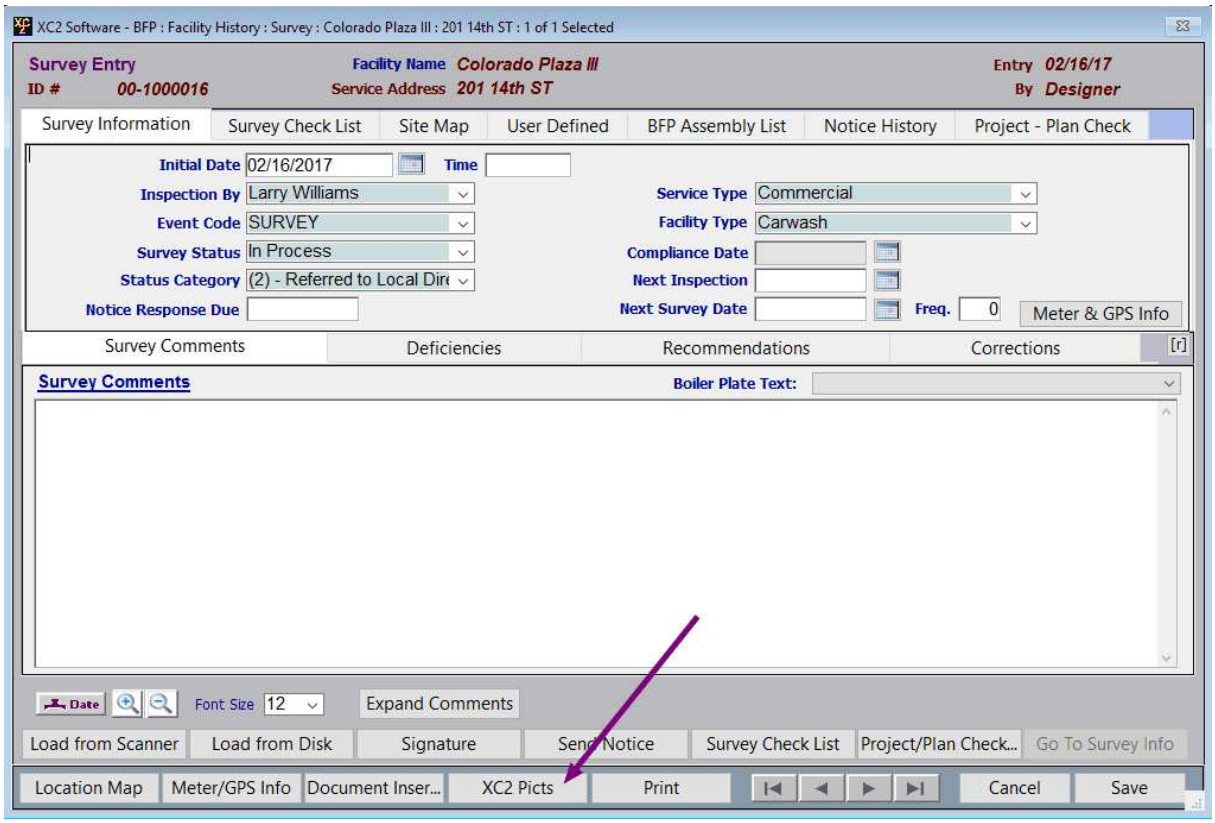
Adding Pictures To The Survey Record

KB Asset ID: 3632

If you have already scanned or uploaded your image into your computer, you can add the image using XC2 Picts

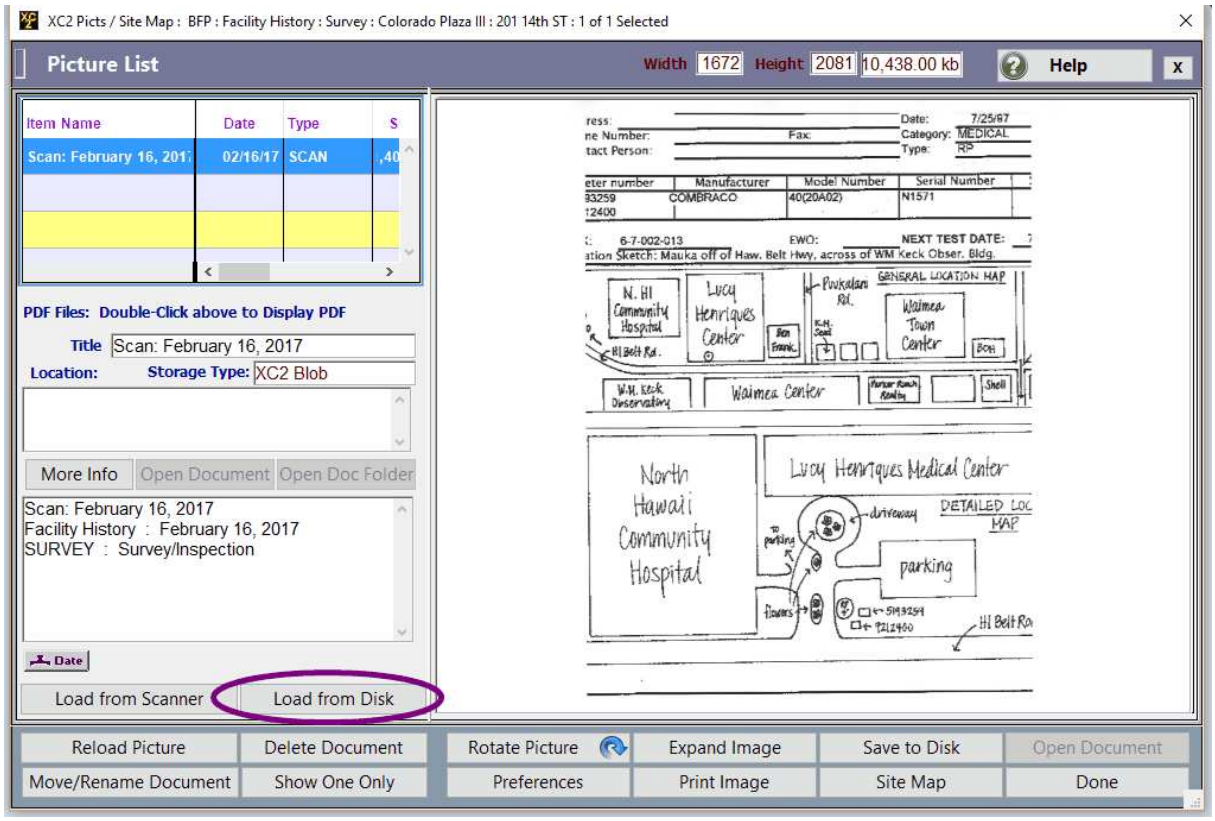
From Within The Survey Record

Click XC2 Picts



Notes:

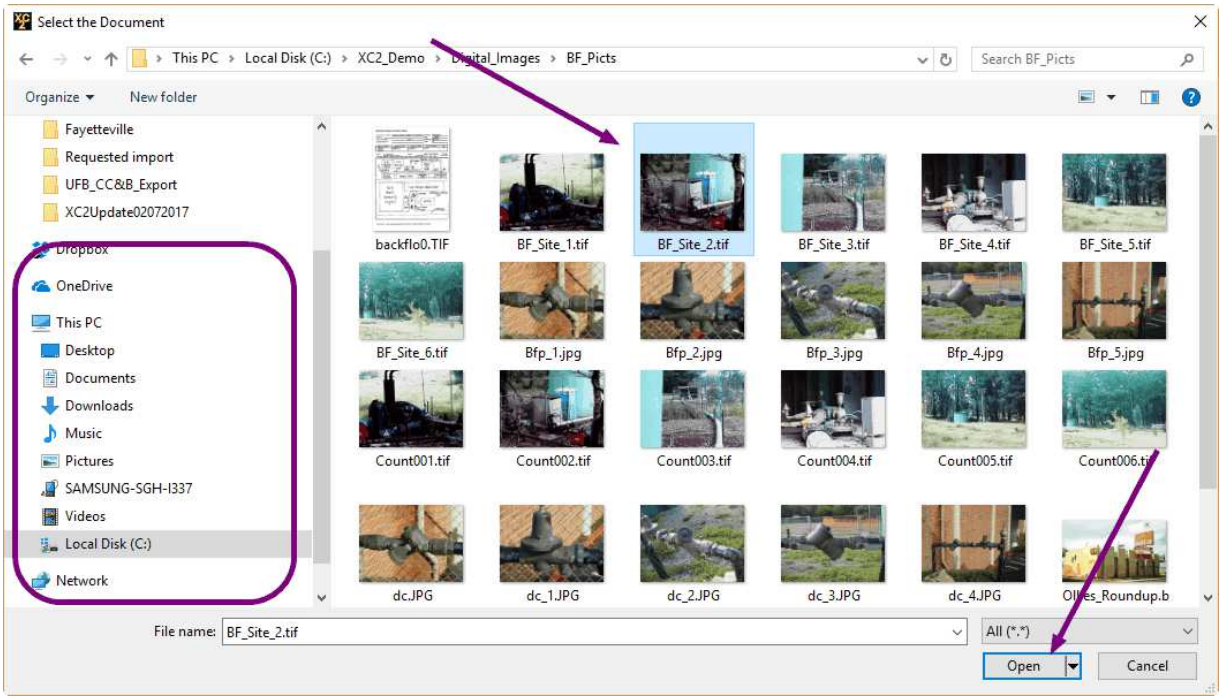
Load From Disc



Notes:

Find The Image

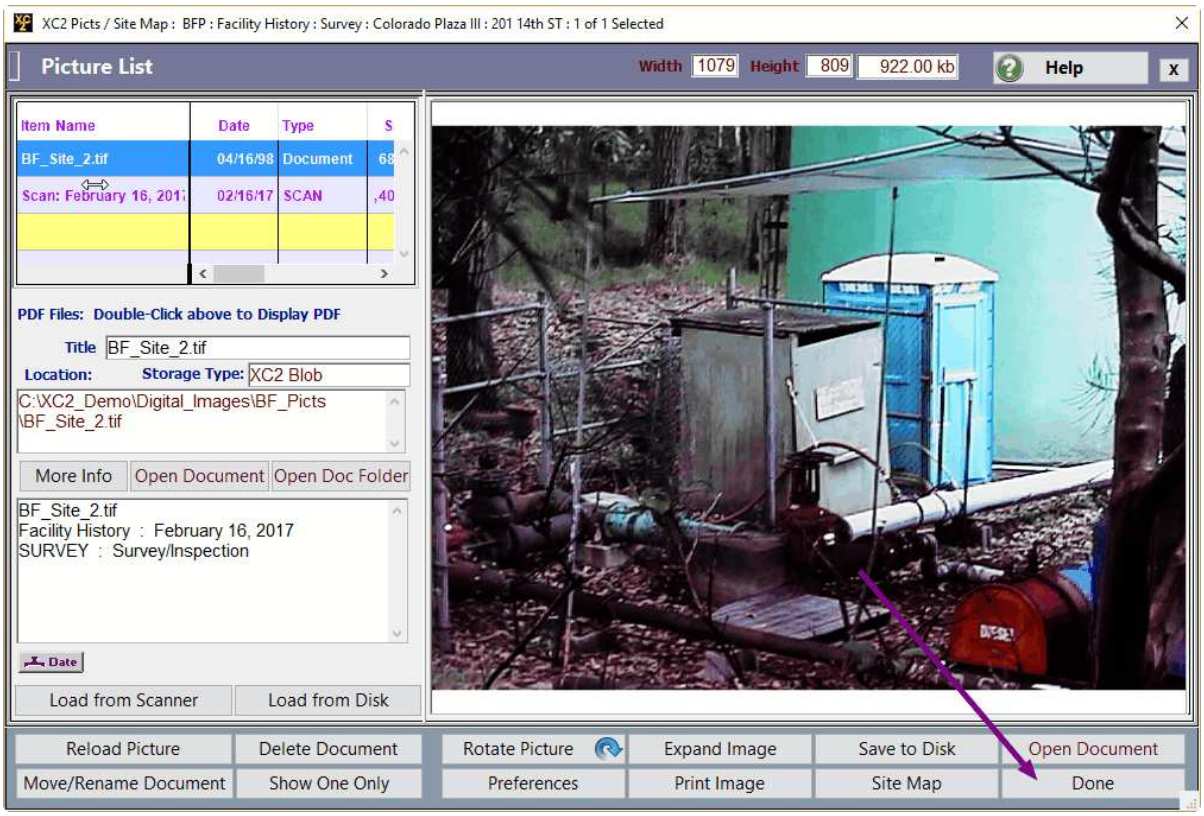
- Navigate to where the image is stored.
- Highlight the image to load
- Click Open



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

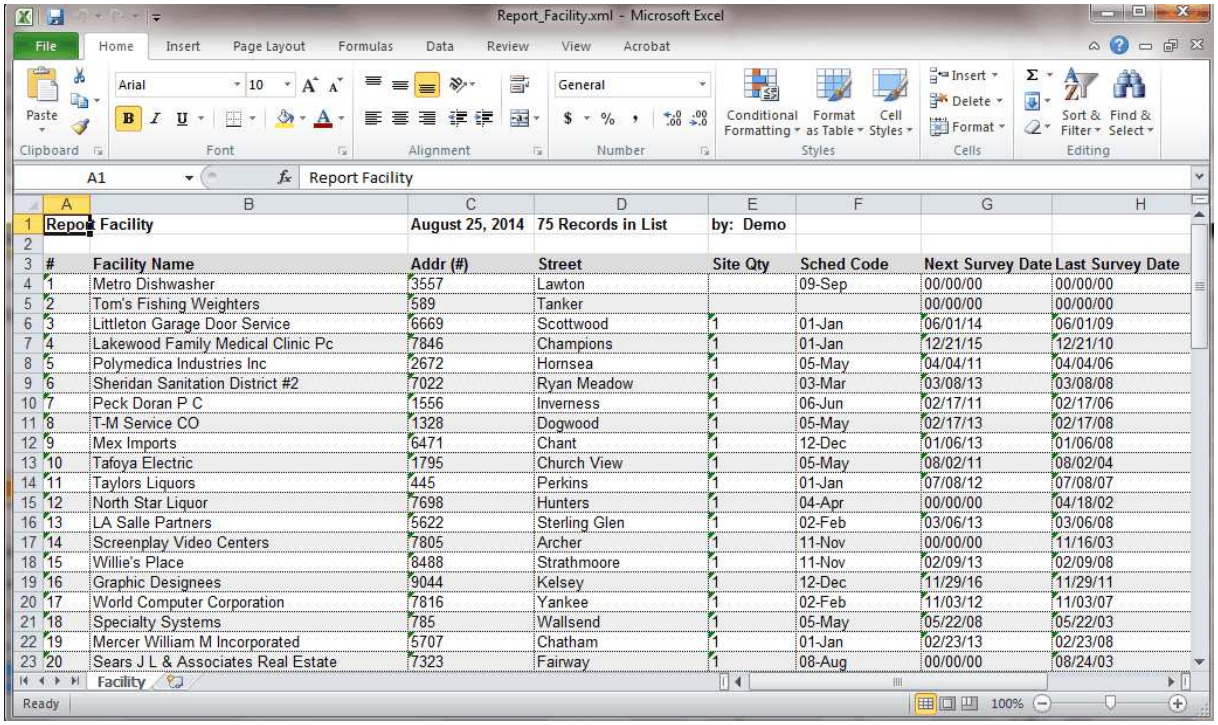
KB Asset ID: 2542

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.



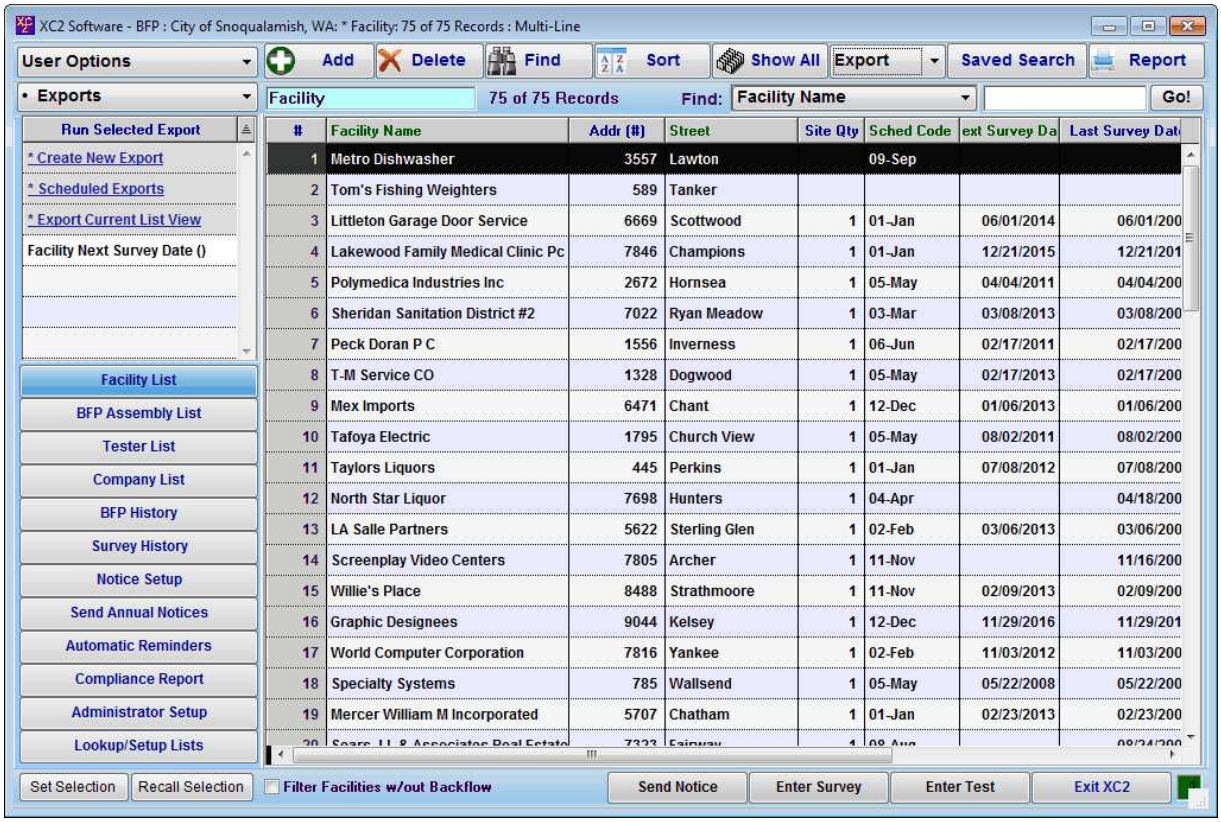
	A	B	C	D	E	F	G	H
1	Report Facility		August 25, 2014	75 Records in List	by: Demo			
2								
3	#	Facility Name	Addr (#)	Street	Site Qty	Sched Code	Next Survey Date	Last Survey Date
4	1	Metro Dishwasher	3557	Lawton		09-Sep	00/00/00	00/00/00
5	2	Tom's Fishing Weighters	589	Tanker			00/00/00	00/00/00
6	3	Littleton Garage Door Service	6669	Scottwood	1	01-Jan	06/01/14	06/01/09
7	4	Lakewood Family Medical Clinic Pc	7846	Champions	1	01-Jan	12/21/15	12/21/10
8	5	Polymedica Industries Inc	2672	Hornsea	1	05-May	04/04/11	04/04/06
9	6	Sheridan Sanitation District #2	7022	Ryan Meadow	1	03-Mar	03/08/13	03/08/08
10	7	Peck Doran P C	1556	Inverness	1	06-Jun	02/17/11	02/17/06
11	8	T-M Service CO	1328	Dogwood	1	05-May	02/17/13	02/17/08
12	9	Mex Imports	6471	Chant	1	12-Dec	01/06/13	01/06/08
13	10	Tafoya Electric	1795	Church View	1	05-May	08/02/11	08/02/04
14	11	Taylors Liquors	445	Perkins	1	01-Jan	07/08/12	07/08/07
15	12	North Star Liquor	7698	Hunters	1	04-Apr	00/00/00	04/18/02
16	13	LA Salle Partners	5622	Sterling Glen	1	02-Feb	03/06/13	03/06/08
17	14	Screenplay Video Centers	7805	Archer	1	11-Nov	00/00/00	11/16/03
18	15	Willie's Place	8488	Strathmoore	1	11-Nov	02/09/13	02/09/08
19	16	Graphic Designees	9044	Kelsey	1	12-Dec	11/29/16	11/29/11
20	17	World Computer Corporation	7816	Yankee	1	02-Feb	11/03/12	11/03/07
21	18	Specialty Systems	785	Wallsend	1	05-May	05/22/08	05/22/03
22	19	Mercer William M Incorporated	5707	Chatham	1	01-Jan	02/23/13	02/23/08
23	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.

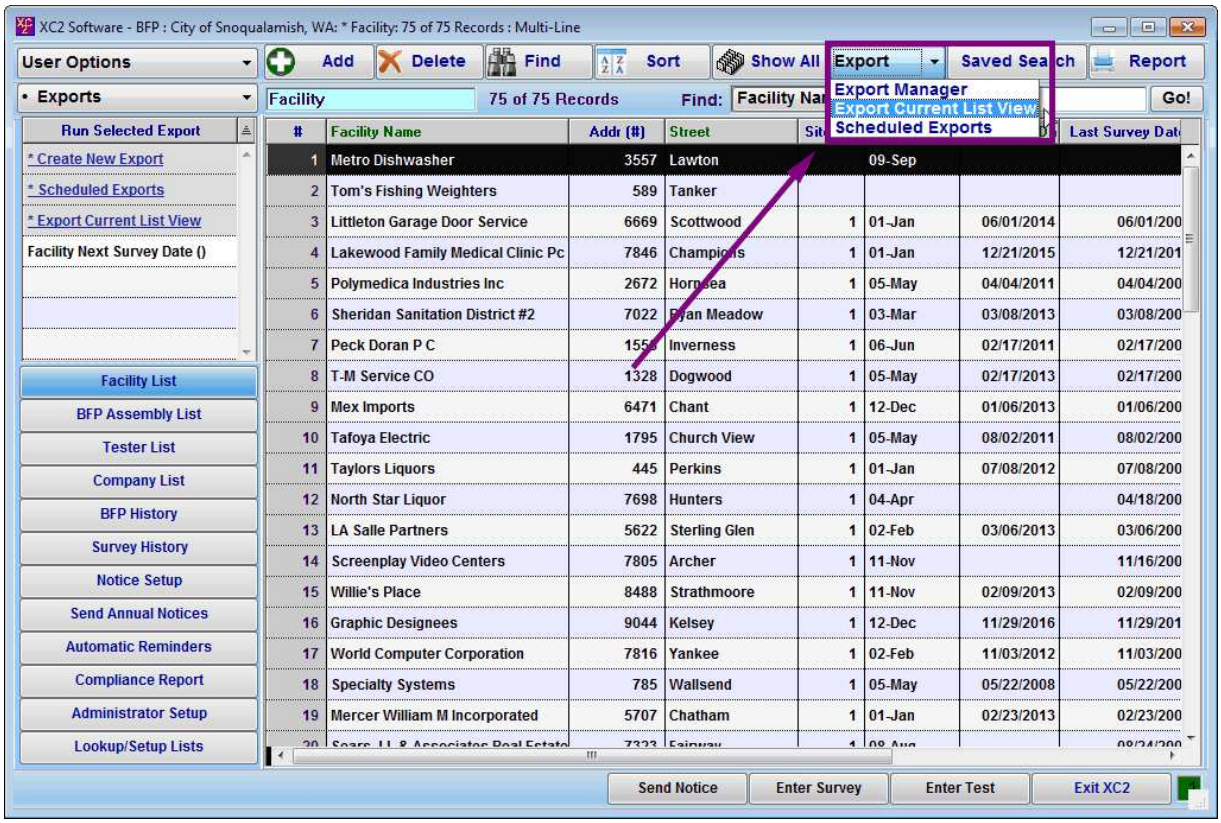
Below I have created a list of Facilities.



Notes:

Export Menu

Next, on the main page, go up to the Export Menu and select Export Current List View

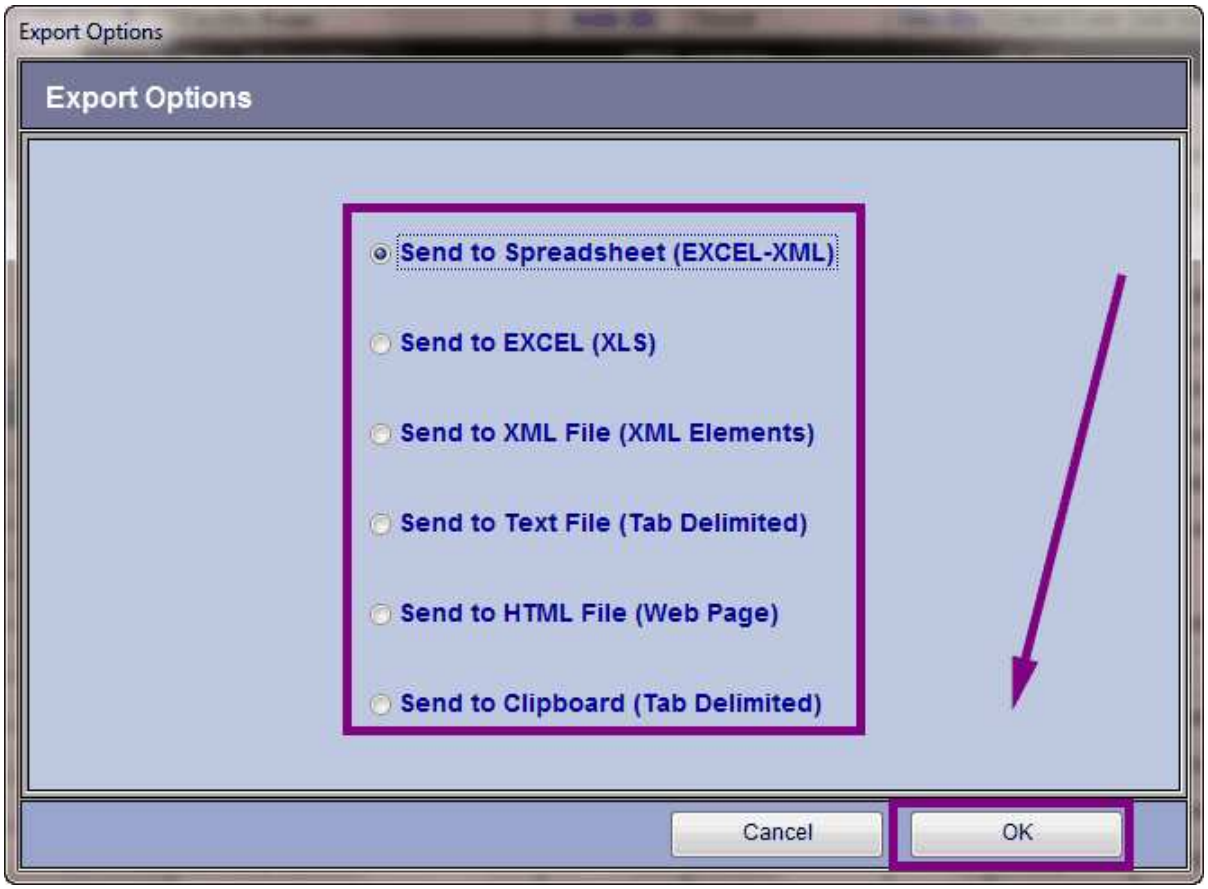


Notes:

Choose the Export file type.

There are 6 different options.

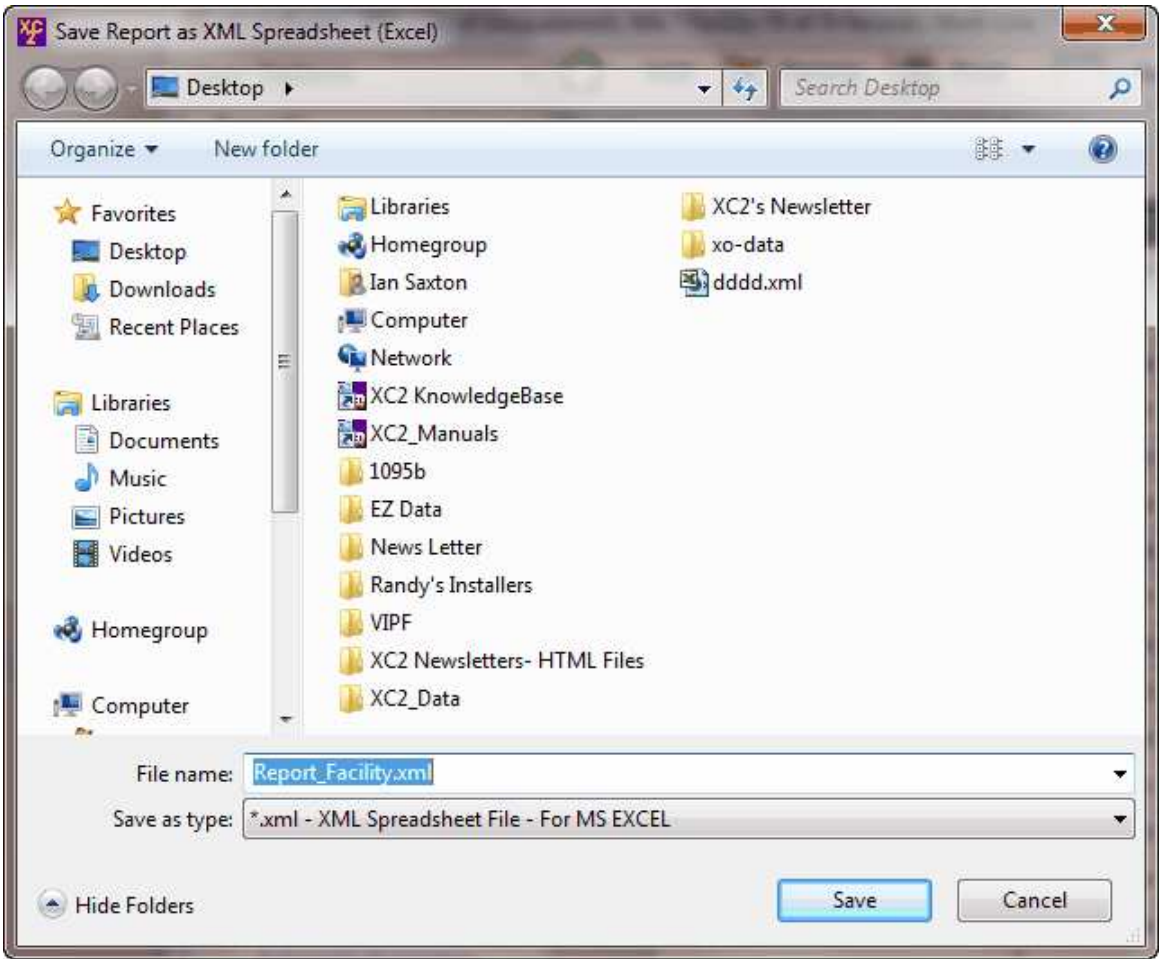
Export to EXCEL (XML) is the default.



Notes:

Save

Choose where the file will be Saved, and give the file a name.



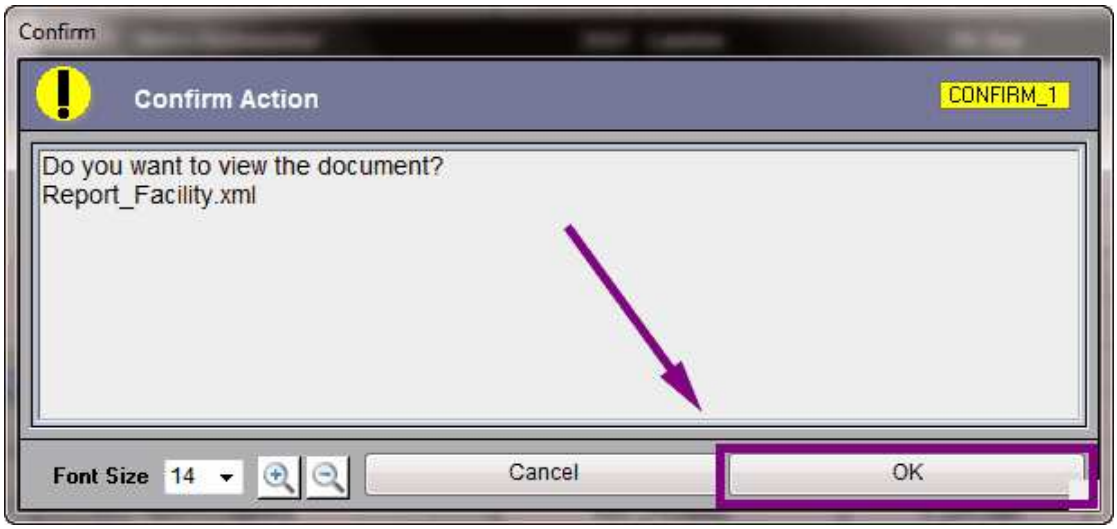
Notes:

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

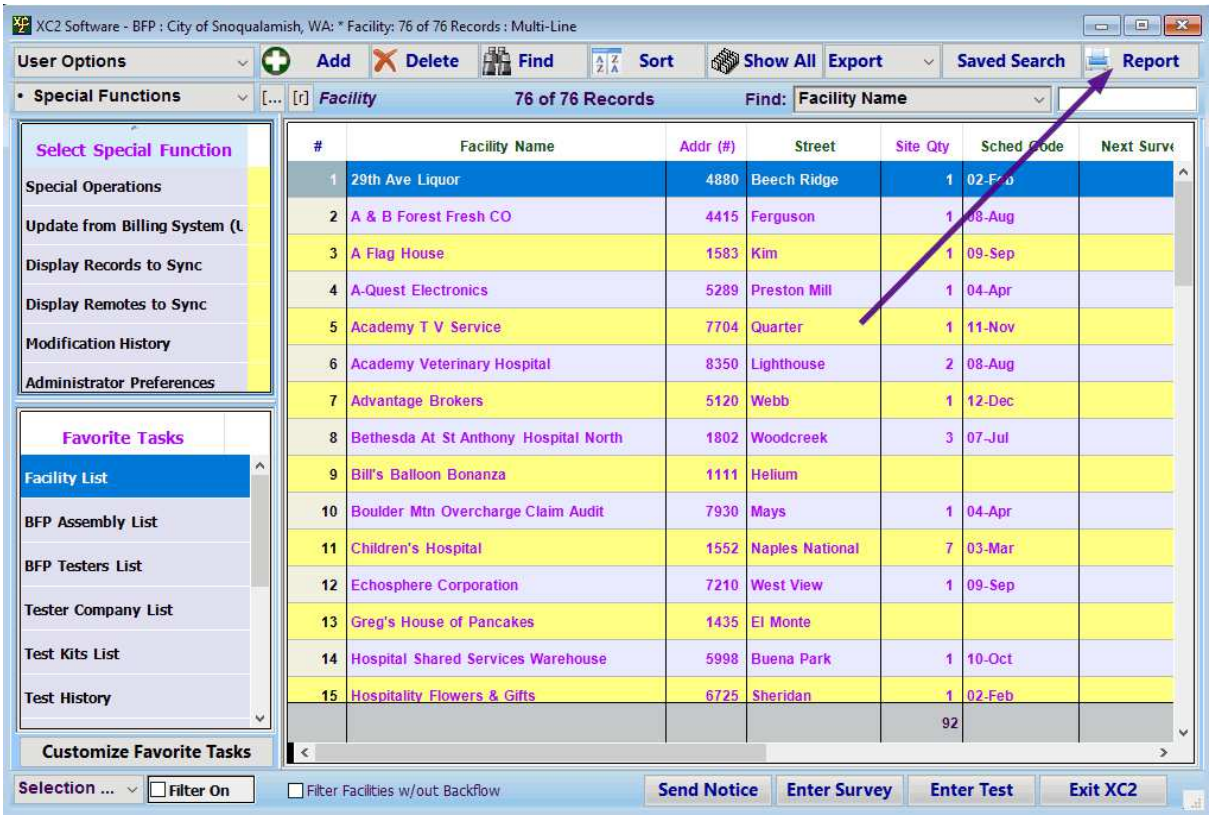
Overdue Test Report

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



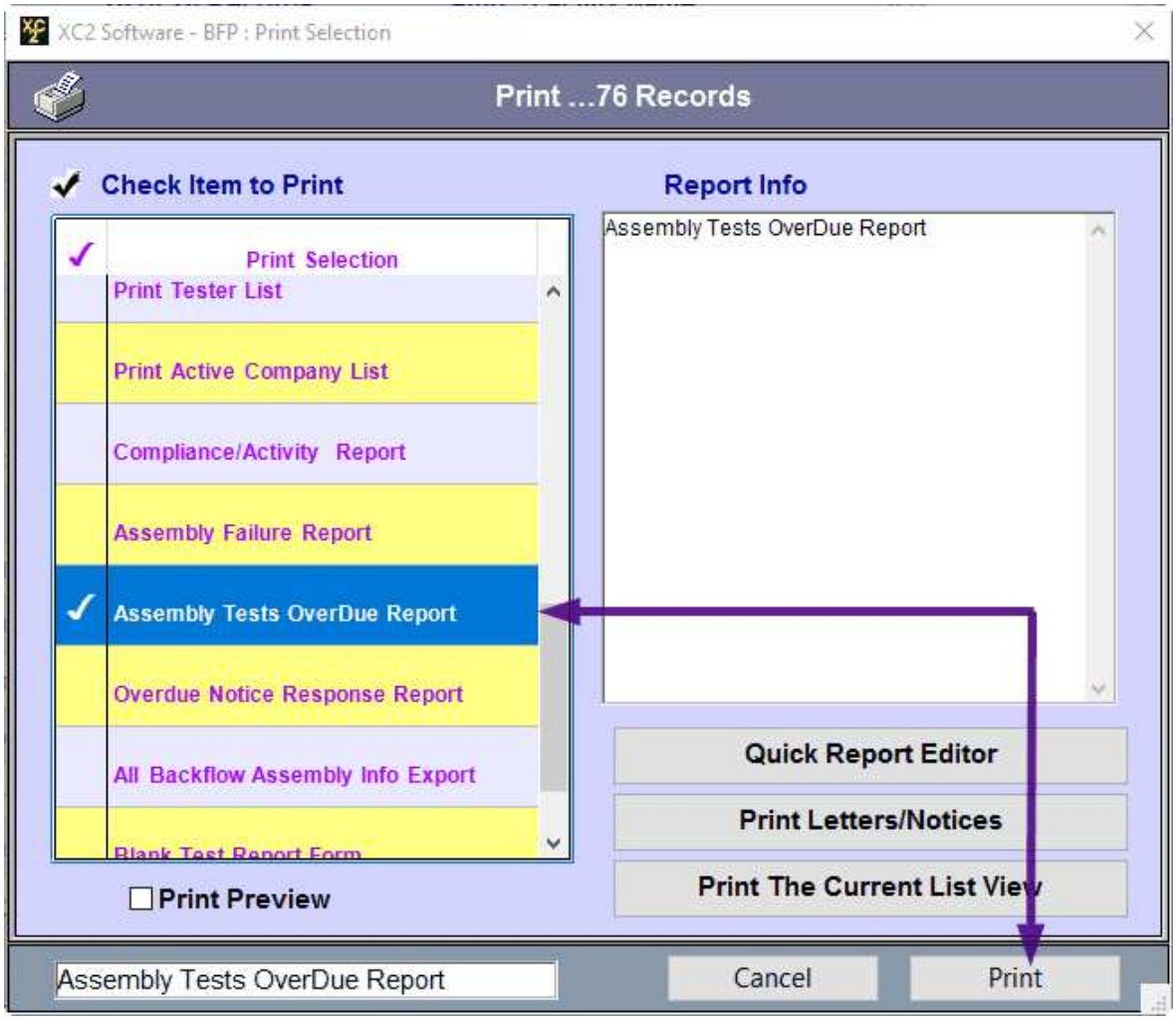
Notes:

Scroll Through List

Highlight the item

Assembly Test Overdue Report

Click Print



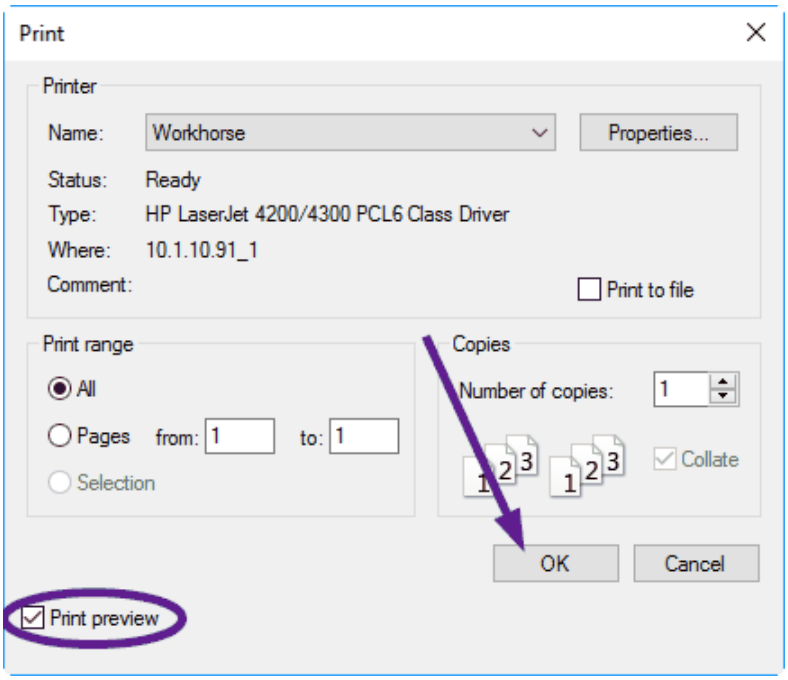
Notes:

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 Snoqualamis	2001187			12/31/10	11/16/09	8I42506	RP
2	Lingerie Etc 1760 S Cuyuga Dr Snoqualamis	2001531			12/31/10	04/24/09	626499	RP
3	Southwest Radiographics 9458 S Rolling Ridge Way Snoqualamis	2001532			12/31/10	04/24/09	618940	RP
4	Southwest Radiographics 9458 S Rolling Ridge Way Snoqualamis	2001533			12/31/10	04/24/09	BJ13719	RP
5	Advantage Brokers 5120 S Webb St Snoqualamis	2001616			12/31/10	09/18/09	767008	RP
6	Children's Hospital 1552 Naples National CT Snoqualiami	2002926			03/31/11	01/10/10	126257	RP
7	A-Quest Electronics 5289 W Preston Mill CT Snoqualamis	2002529			04/30/11	12/01/11	123911	RP
8	A & B Forest Fresh CO 4415 N Ferguson Ave Snoqualamis	2002020			08/31/11	08/03/11	2002020	RP
9	Metro Dishwasher 3557 W Lawton St Snoqualamis	2001590			09/30/11	10/12/11	592168	RP
10	U S Hospitality Consultant 2714 Woodsfield CT Snoqualiami	2002989			10/31/11	10/15/10	2002989	RP
11	Hospitality Group Inc The 429 Cali Glen Ln Snoqualiami	2003108			10/31/11	10/10/10	778099	RP
12	Storewise Software Inc 5038 Somerset Rd Snoqualamis	2000406			11/30/11	02/28/10	700314	RP
13	Storewise Software Inc 5038 Somerset Rd Snoqualamis	2000407			11/30/11	02/28/10	115417	DC
14	Resolution Trust Corp 1905 S Hillyer Ave Snoqualamis	2001140			11/30/11	12/01/10	176543	RP

Page: 1

Notes:

--- Page 4 of 4 ---

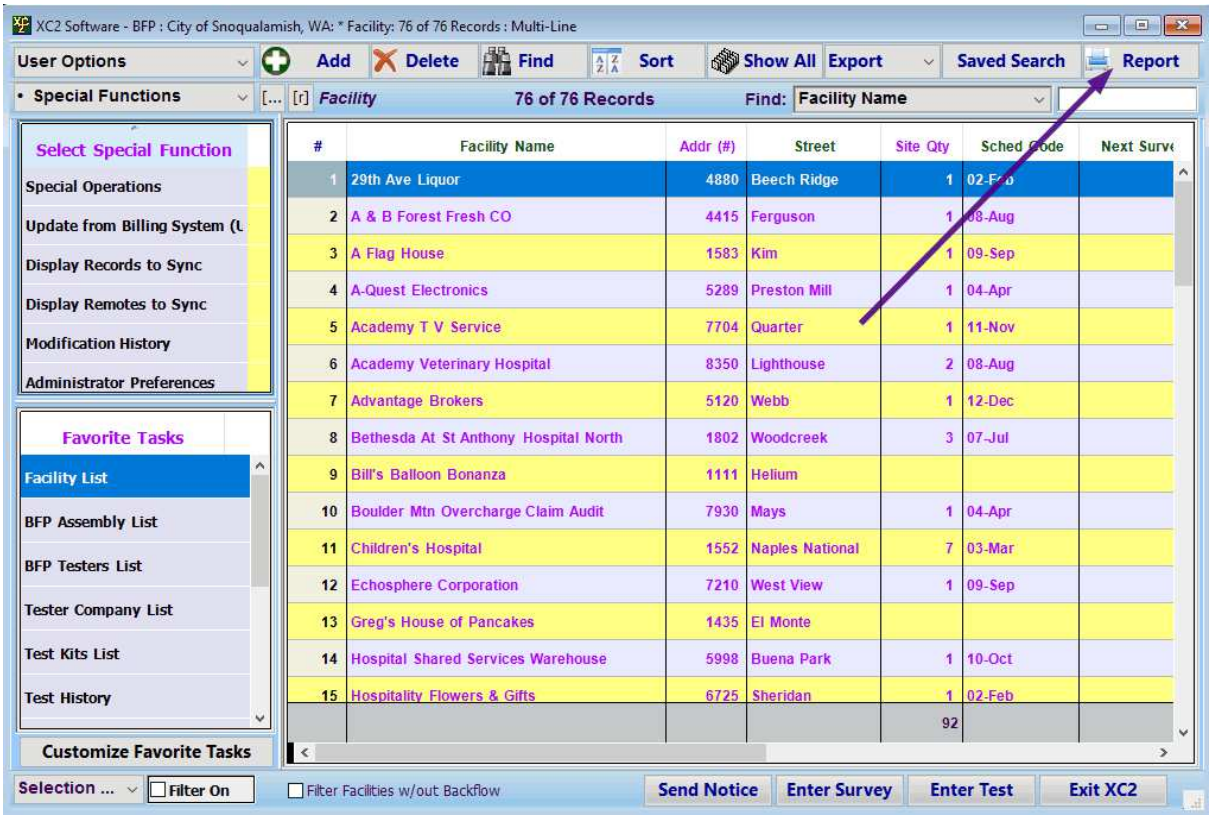
XC2 Software Knowledge Base

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

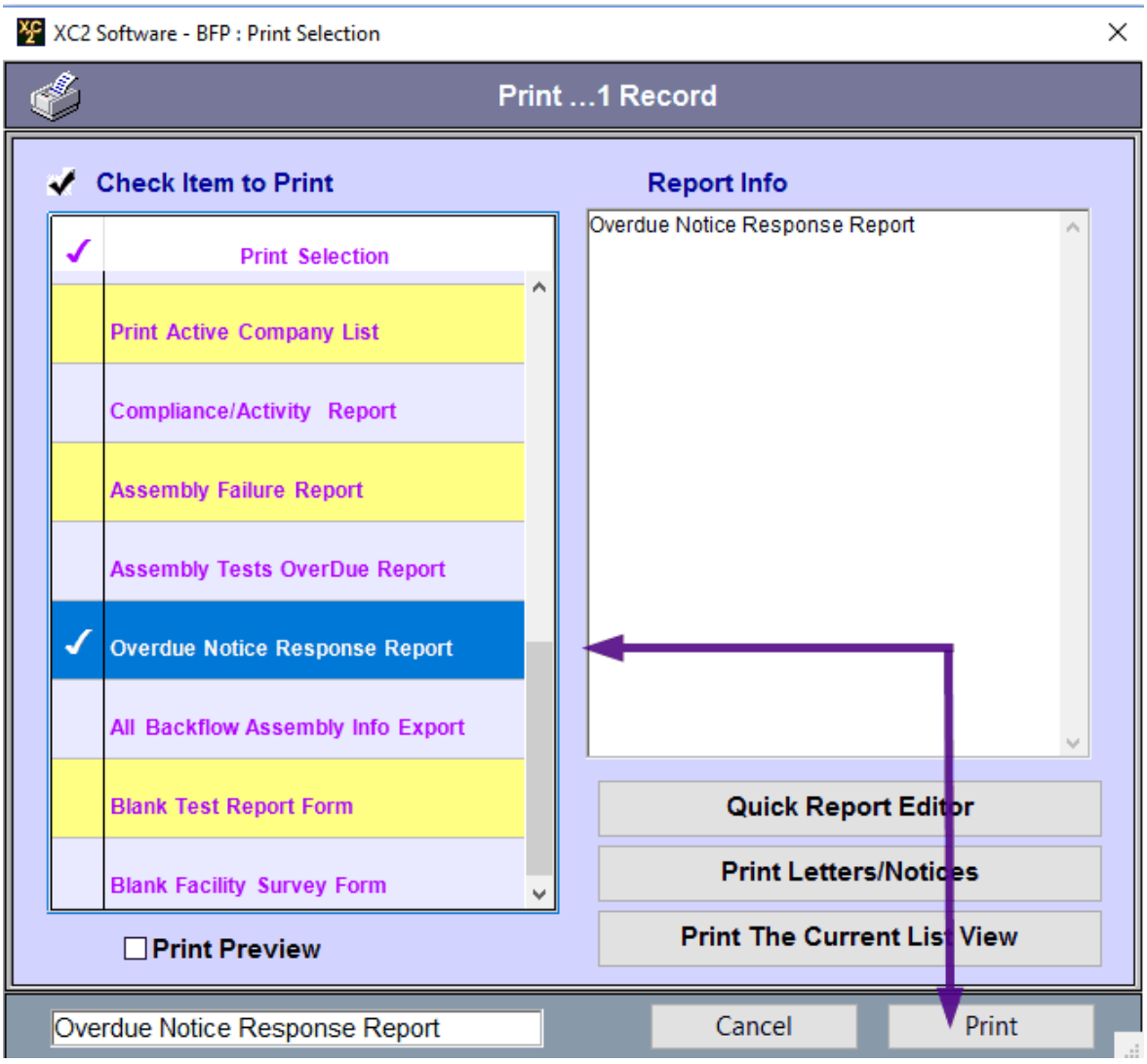


Notes:

Scroll list

Scroll through list until you find Overdue Notice Response Report

Click Print



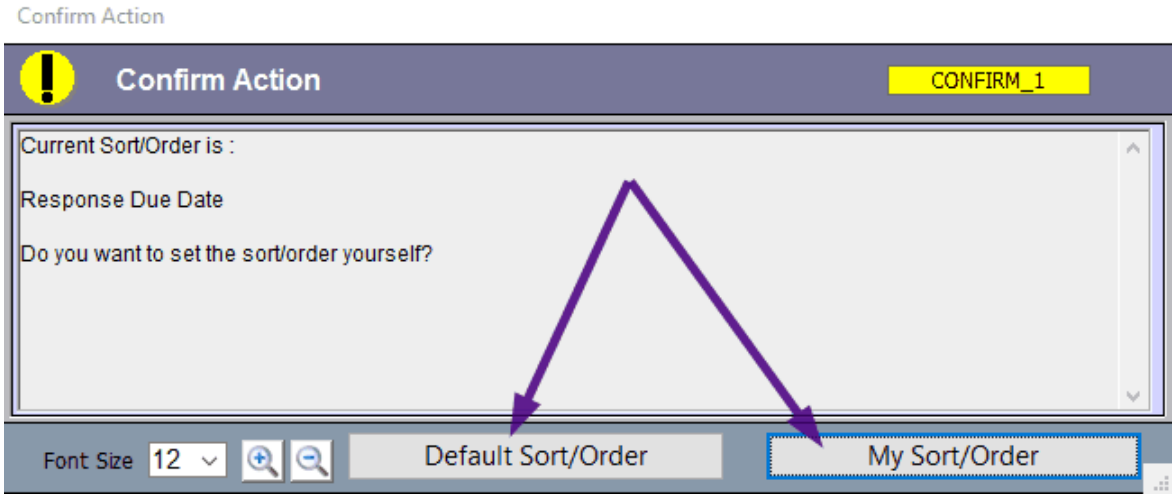
Notes:

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 theis case we are going to choose the sort order.

My Sort/Order



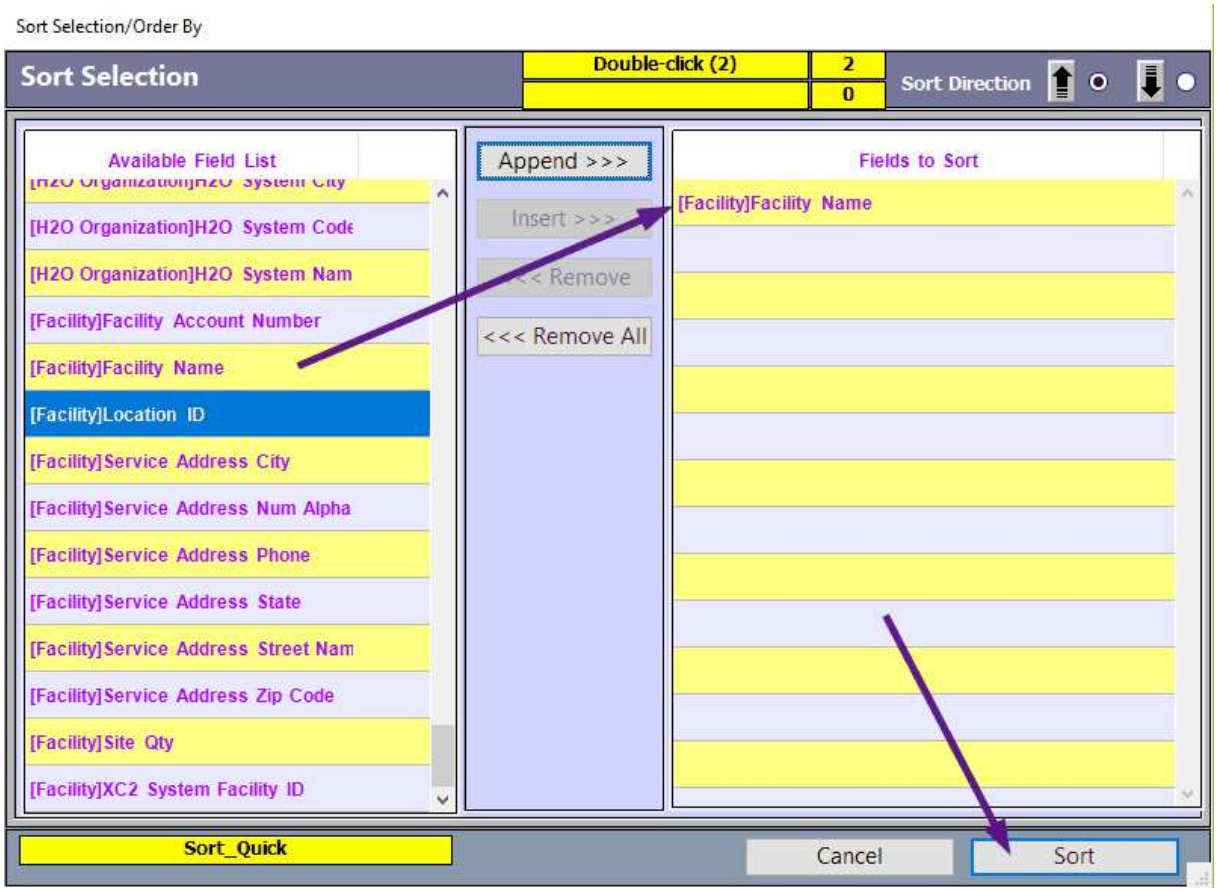
Notes:

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



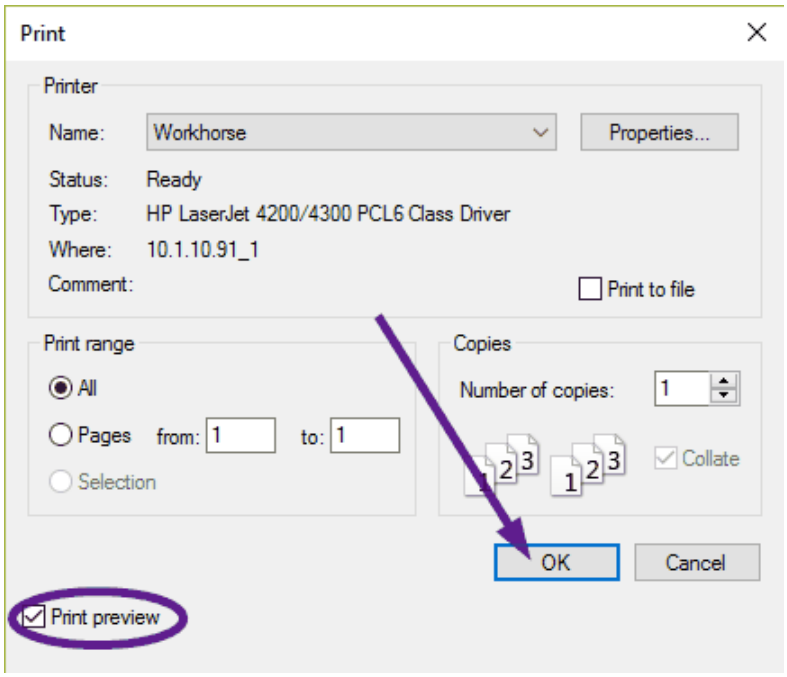
Notes:

Print/Print Preview

You may widh 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	

Facility Name

Page: 1

Notes:

XC2 Software Knowledge Base

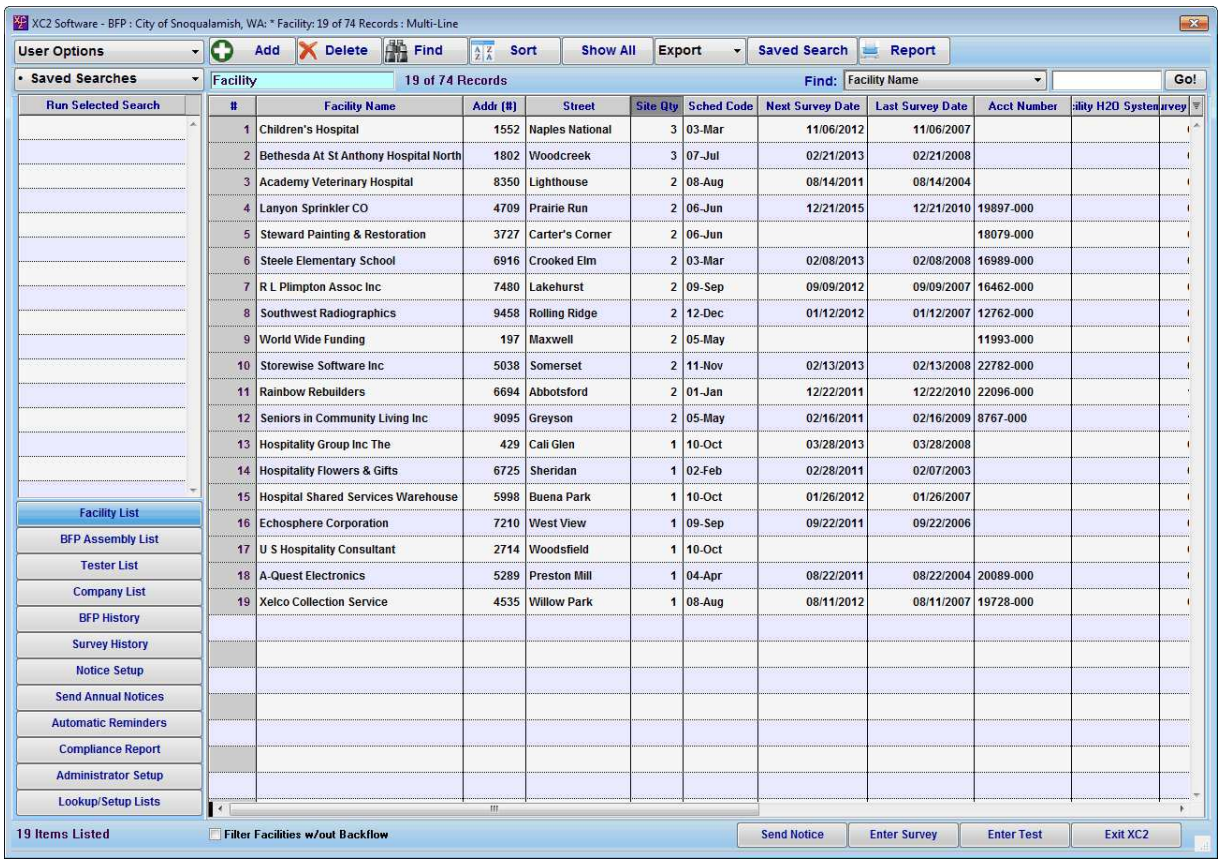
How To Export: Export Editor

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

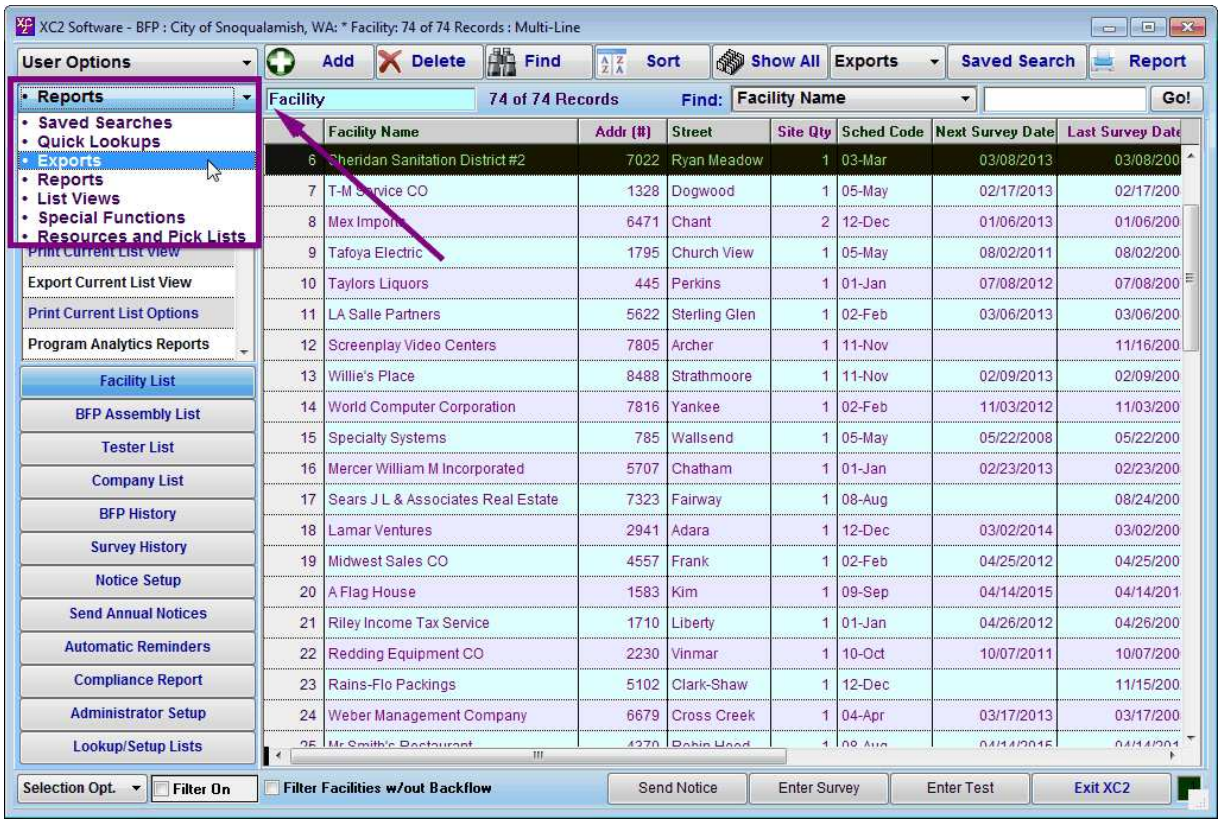


#	Facility Name	Addr (#)	Street	Site Qty	Sched Code	Next Survey Date	Last Survey Date	Acct Number
1	Children's Hospital	1552	Naples National	3	03-Mar	11/06/2012	11/06/2007	
2	Bethesda At St Anthony Hospital North	1802	Woodcreek	3	07-Jul	02/21/2013	02/21/2008	
3	Academy Veterinary Hospital	8350	Lighthouse	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

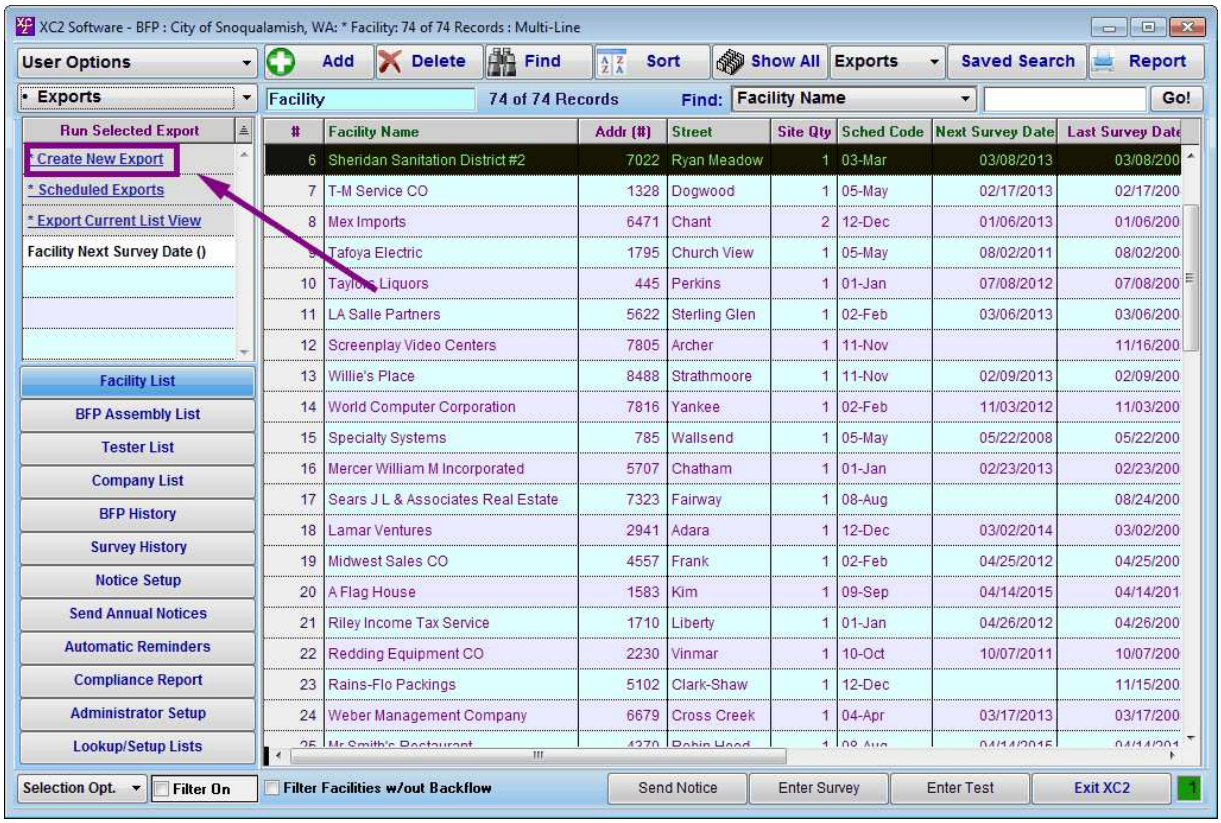
On the Main Page,in the Top Left pulldown menu, select Exports.



Notes:

Create Export

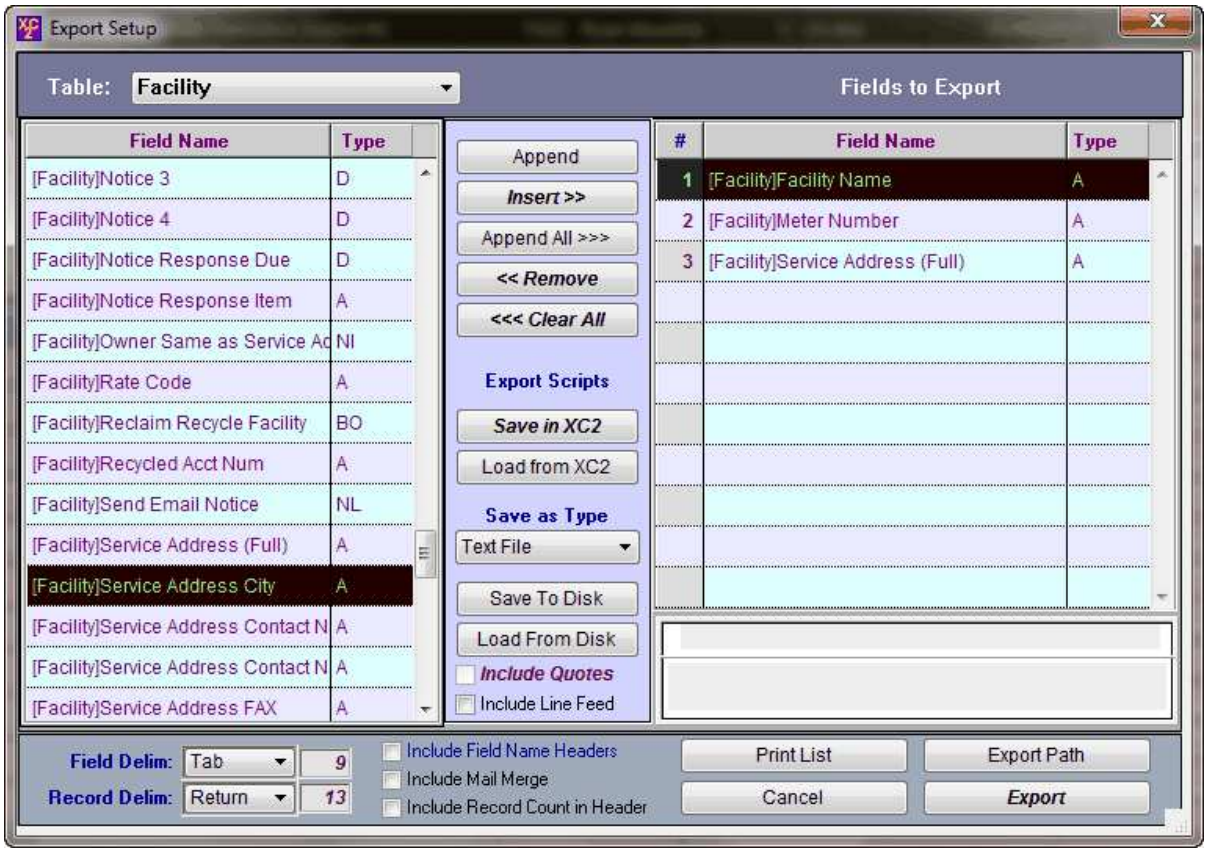
Select Create New Export



Notes:

Export Editor

In the Export Editor Select the type of fields that you would like to export

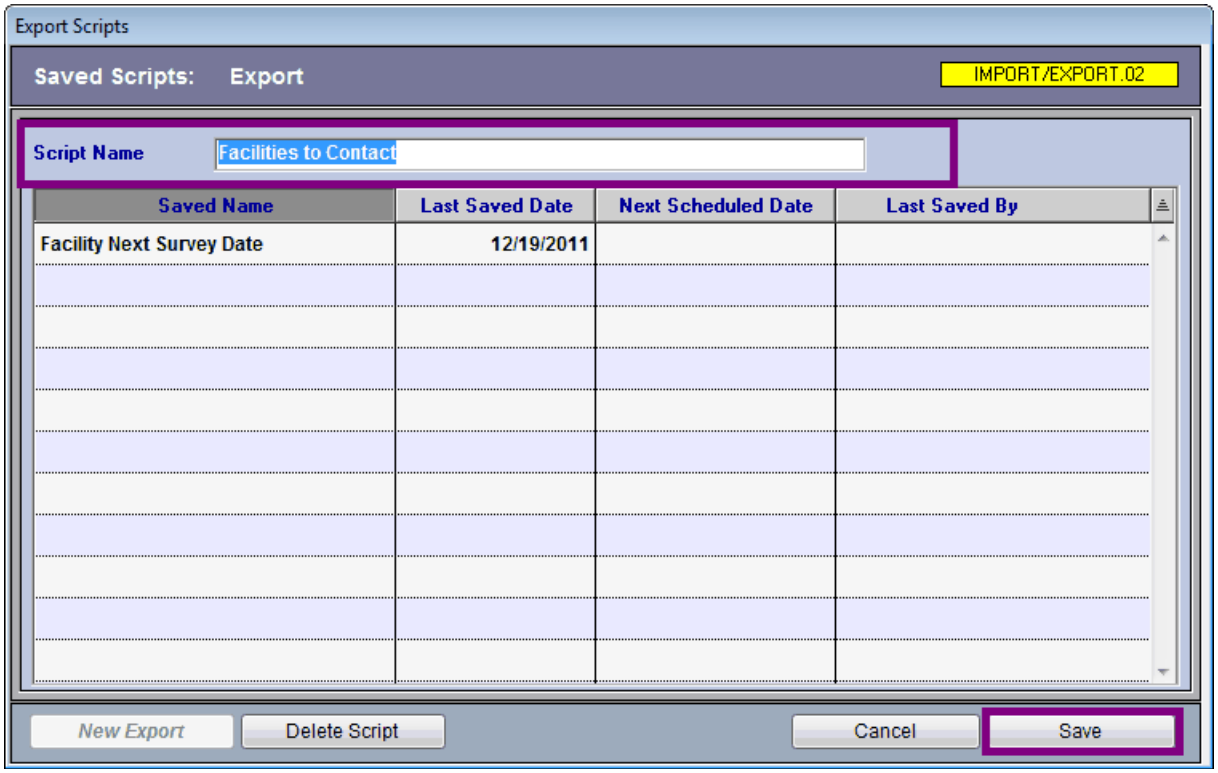


Notes:

Save Export

In Script Name Choose a name for your Export

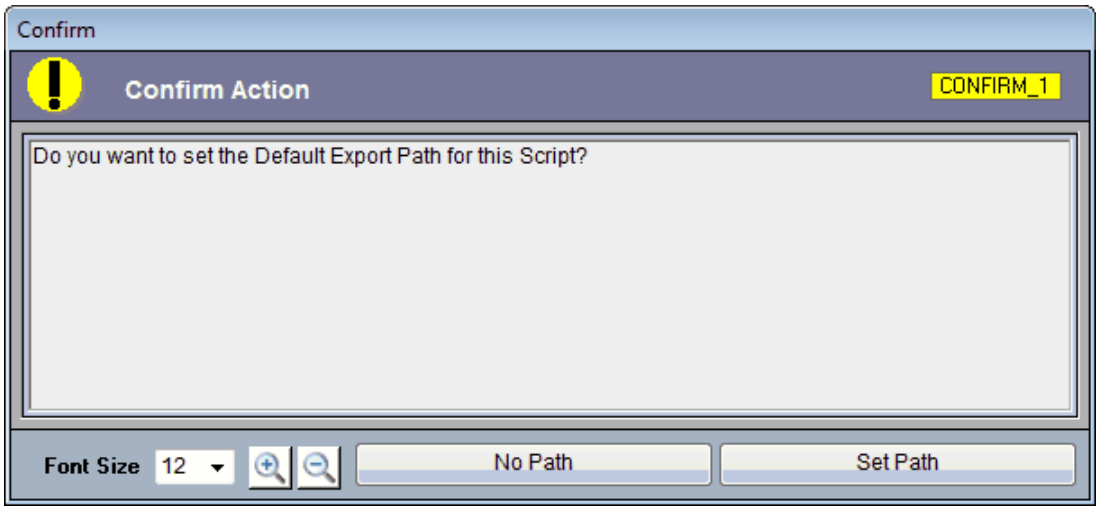
Click Save



Notes:

Confirmation

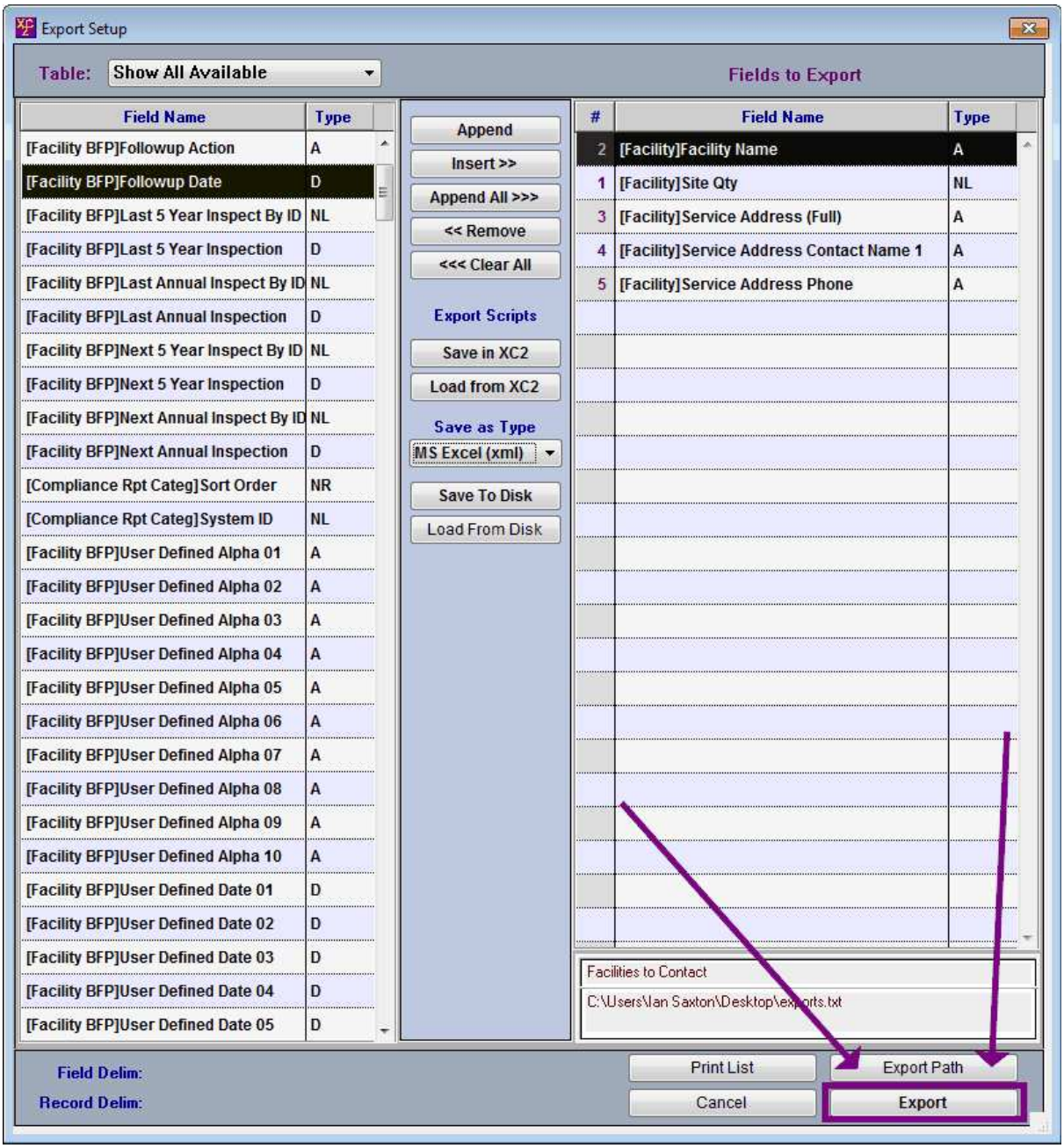
XC2 will ask you if you would like to set the Default Export Path.



Notes:

Export

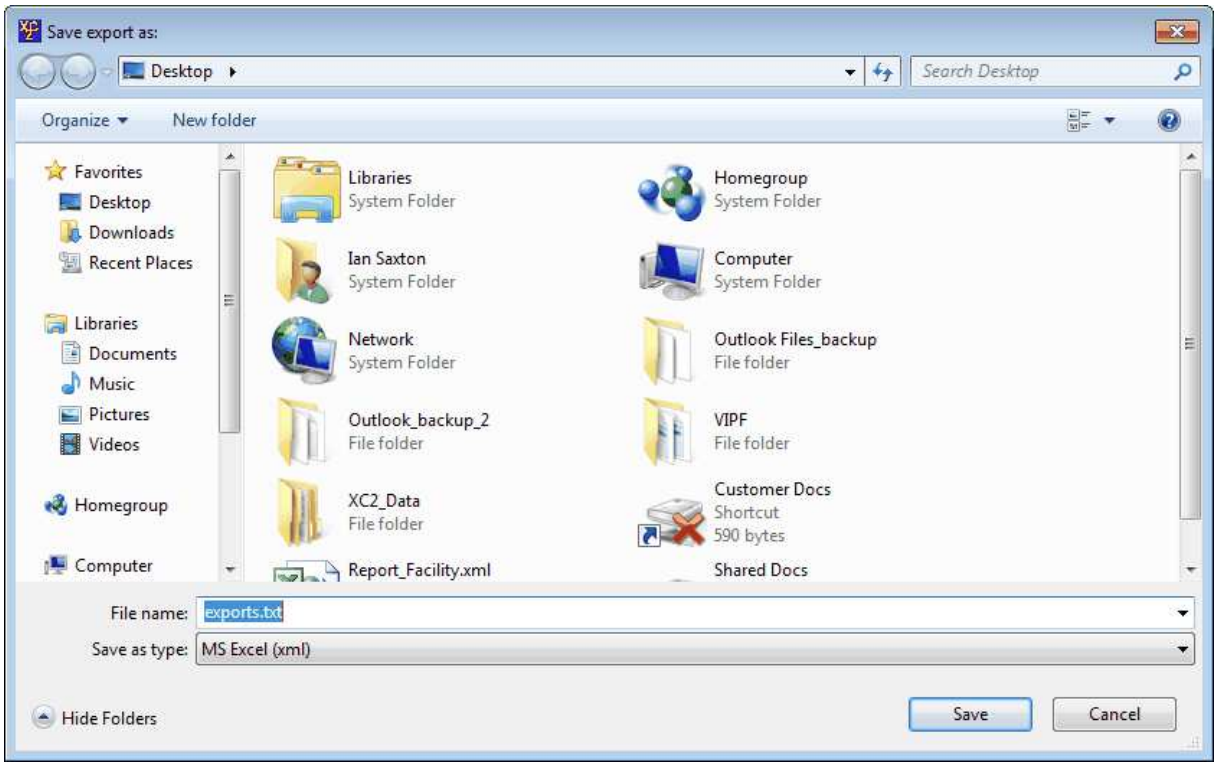
When you are ready to Export, press Export.



Notes:

Choose Location

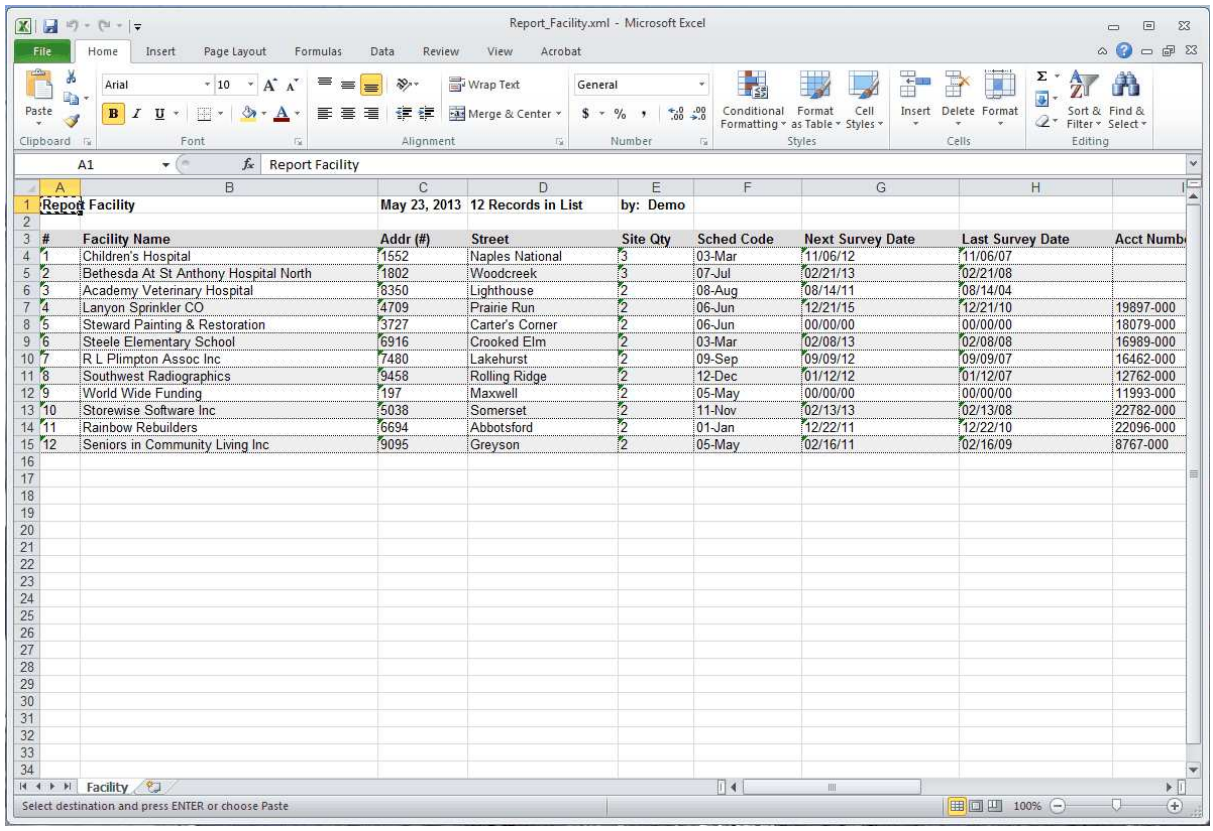
Choose where you want to save the export.



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 Veterinary 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

XC2 Software Knowledge Base

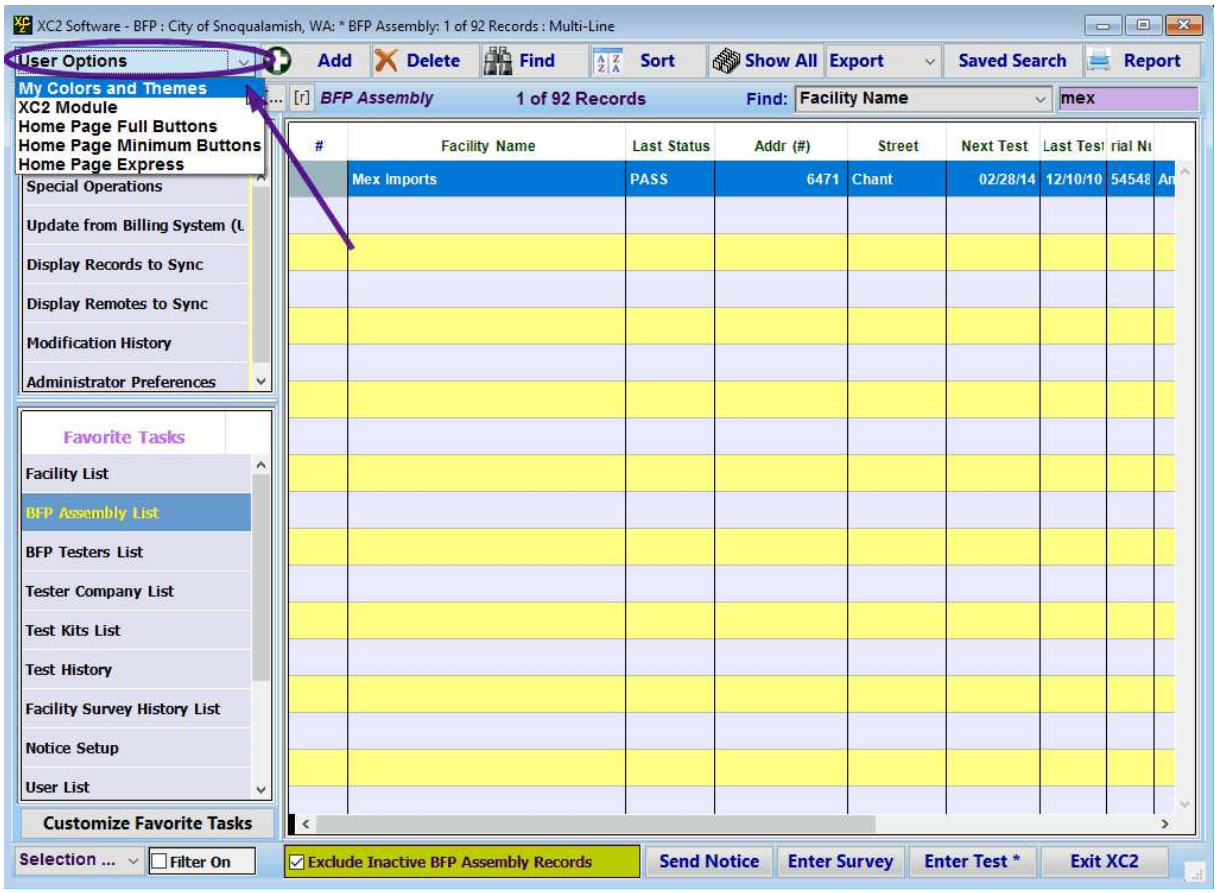
User Preference Setup - Adding Pictures To XC2

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



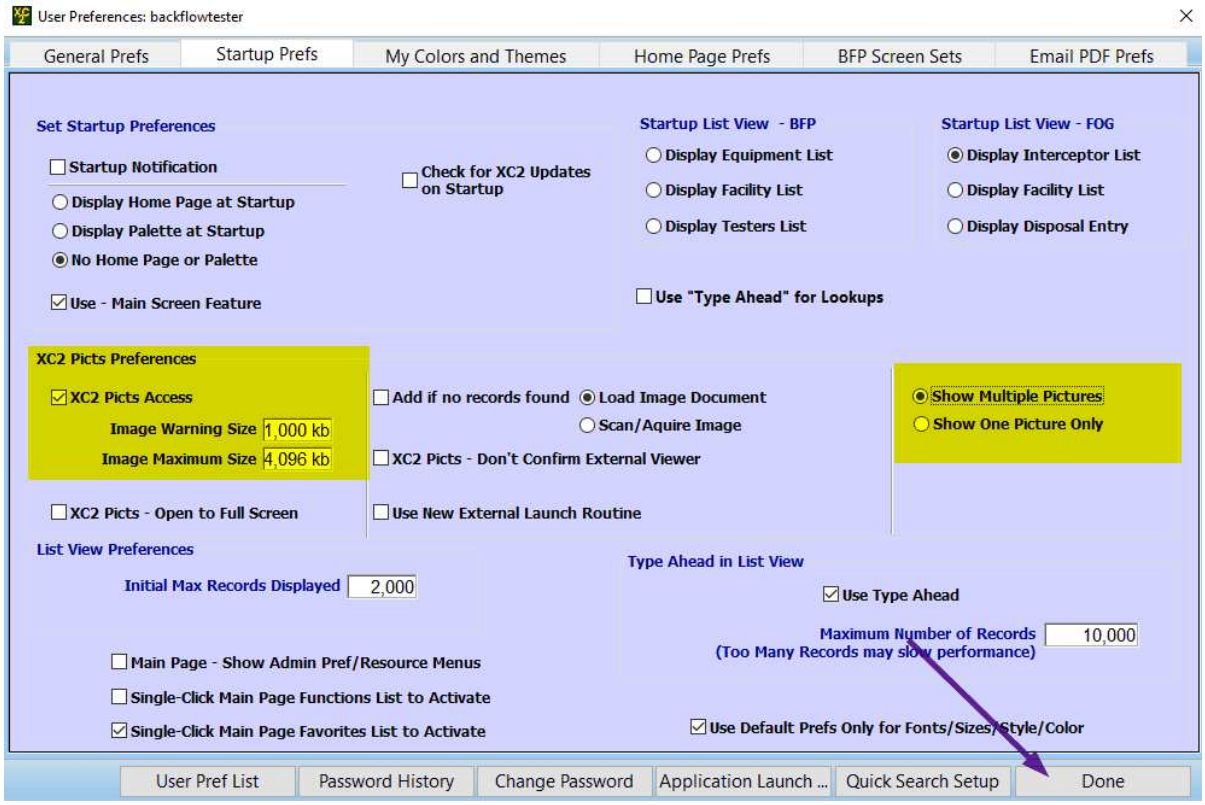
Notes:

Set Your Picts Preference

Click the Startup Prefs tab

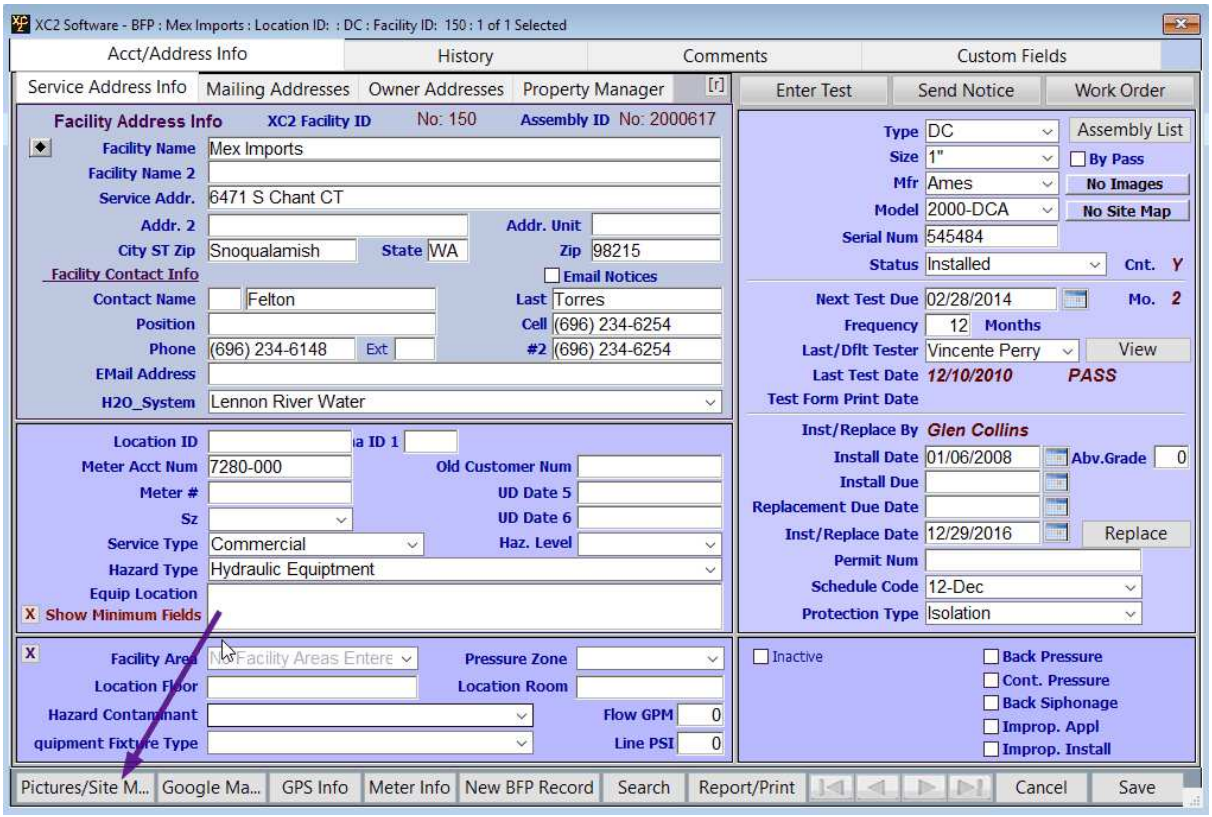
• Check the Box XC2 Picts Access

If you will storing multiple pictures within a record, (recommended) select
• Show Mutiple Pictures



Notes:

XC2 Picts Access Now Available



Notes:

XC2 Software Knowledge Base

XC2 Picts Image and Document Storage Options

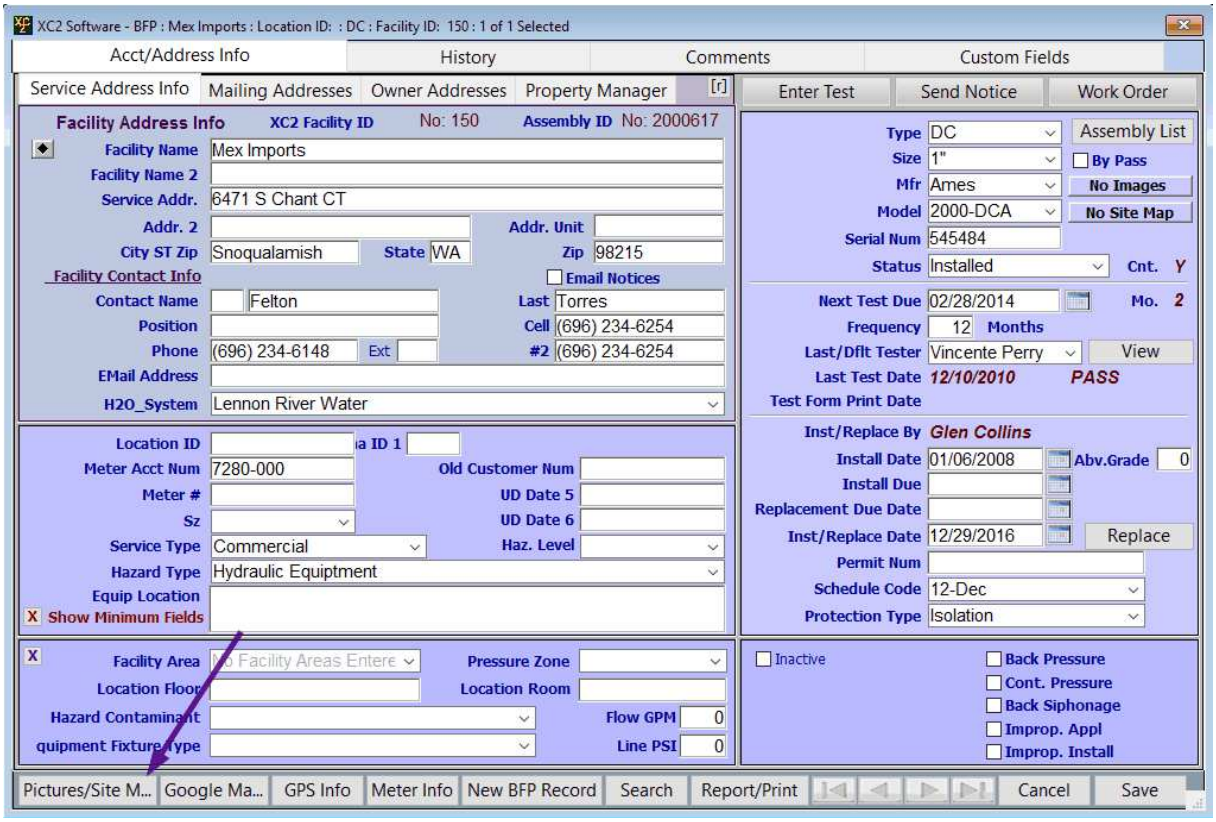
KB Asset ID: 3532

The images and documents that you access in XC2 can be stored in alternate locations.

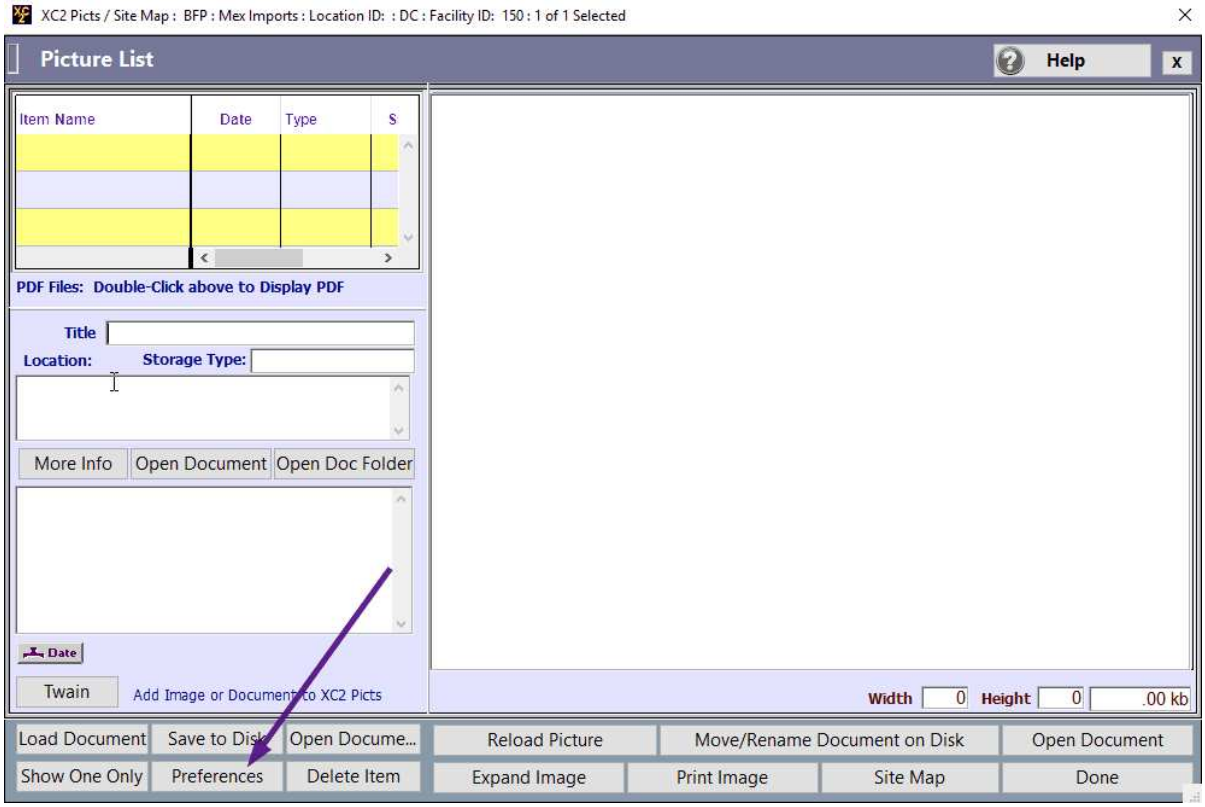
Accessing XC2 Picts Preferences

Open any record type that has the option to load images

- Click the XC2 Pict button



Notes:


XC2 Picts / Site Map : BFP : Mex Imports : Location ID: : DC : Facility ID: 150 : 1 of 1 Selected
Picture List
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
Twain
Add Image or Document to XC2 Picts
Width
0
Height
0
.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

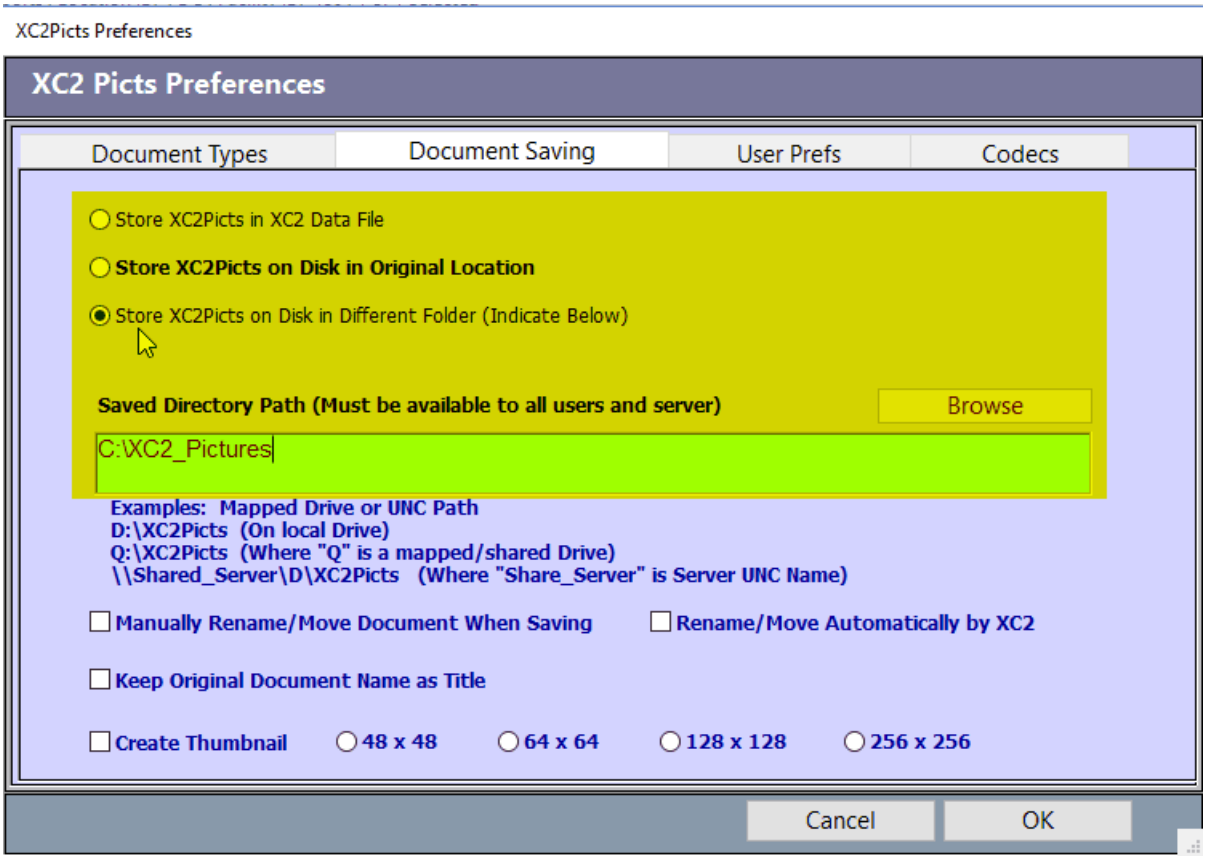
Notes:

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



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.

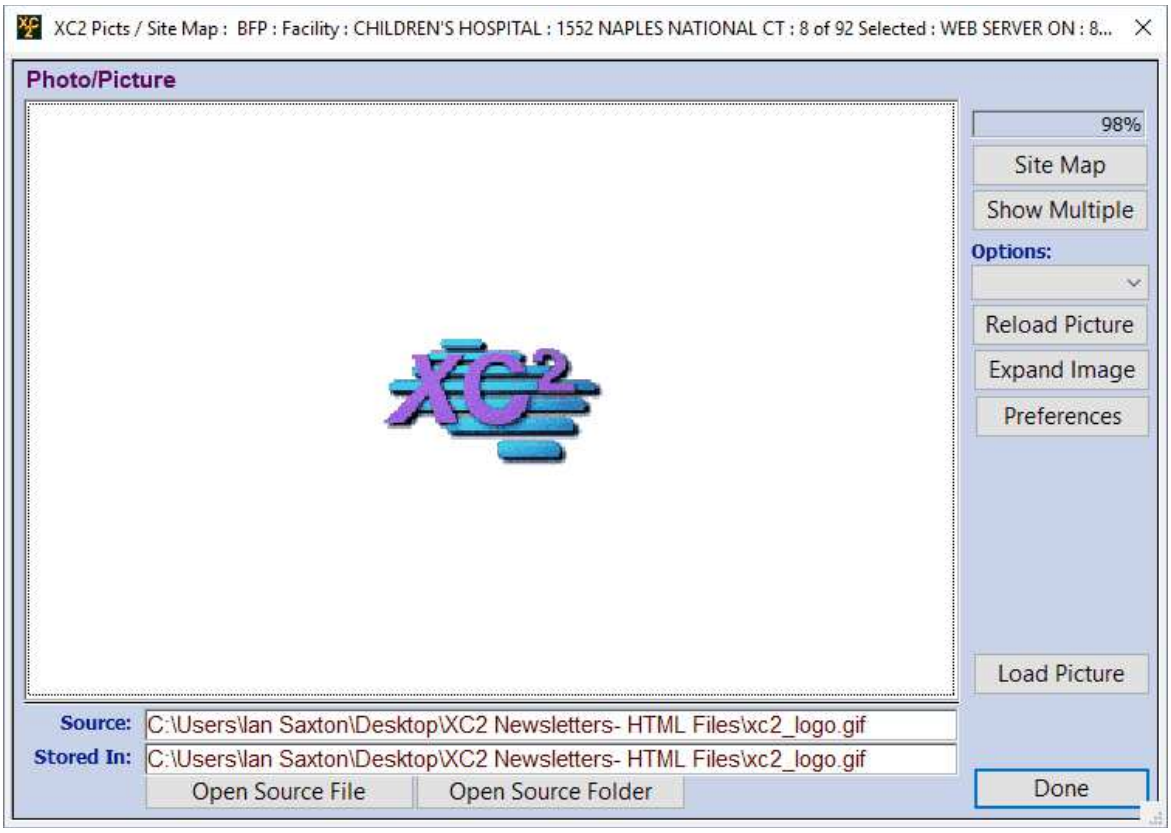
Two Different Picture Screens

In XC2 you can choose between two differnt picture screens

1) Show 1 Image
2) Show Multiple images

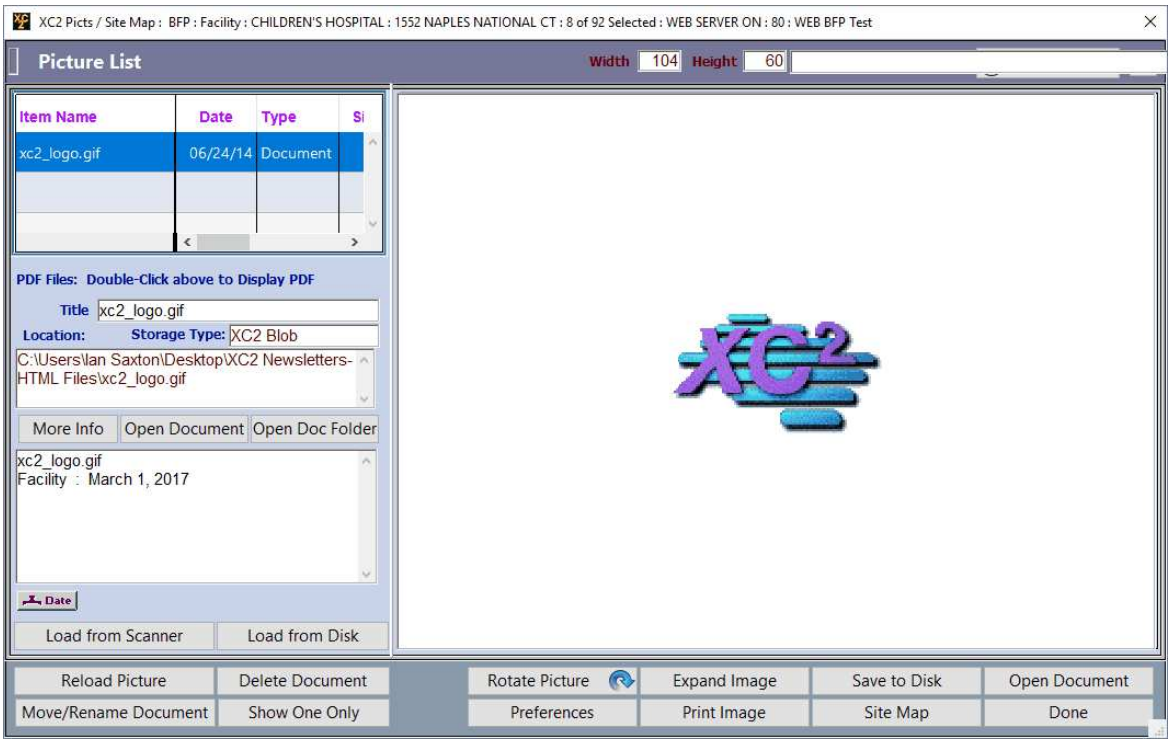
The page will describe how to chage between the two screen sets.

One Image View



Notes:

Multi Image View

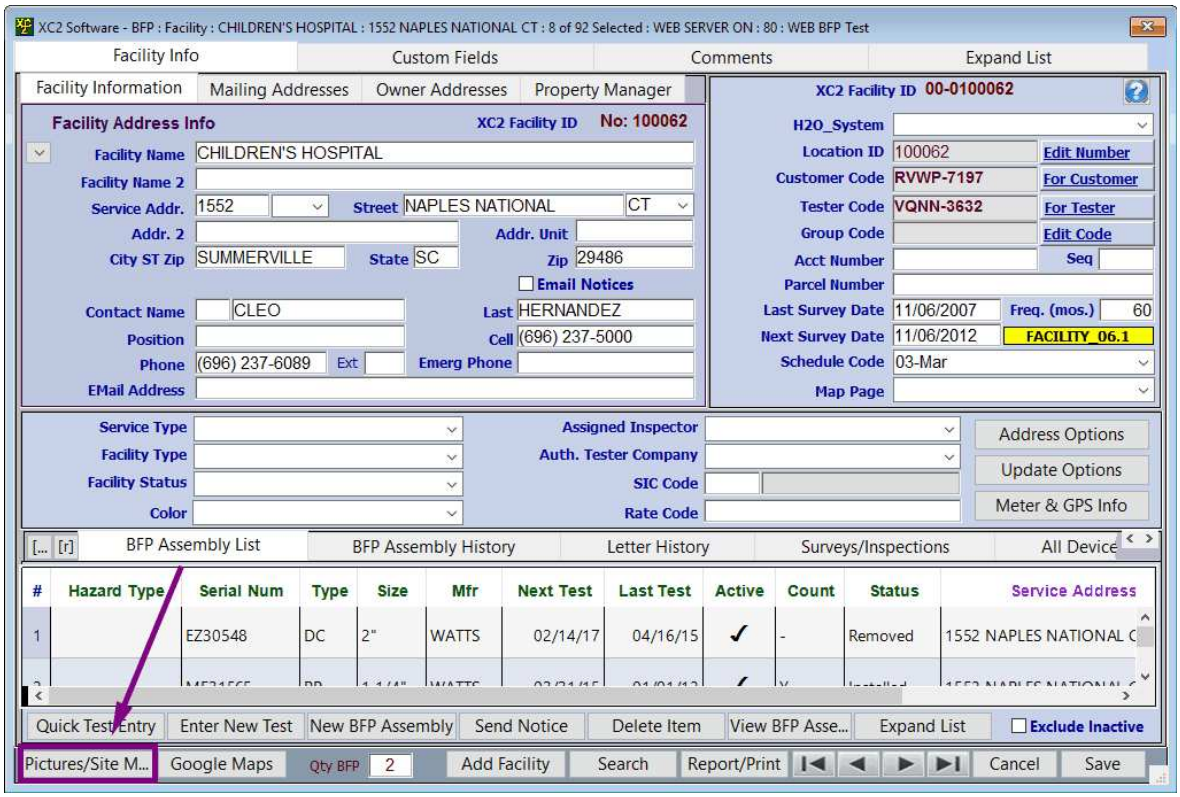


Notes:

Open XC2 Pics

You can switch between the image screens inside XC2 picts.

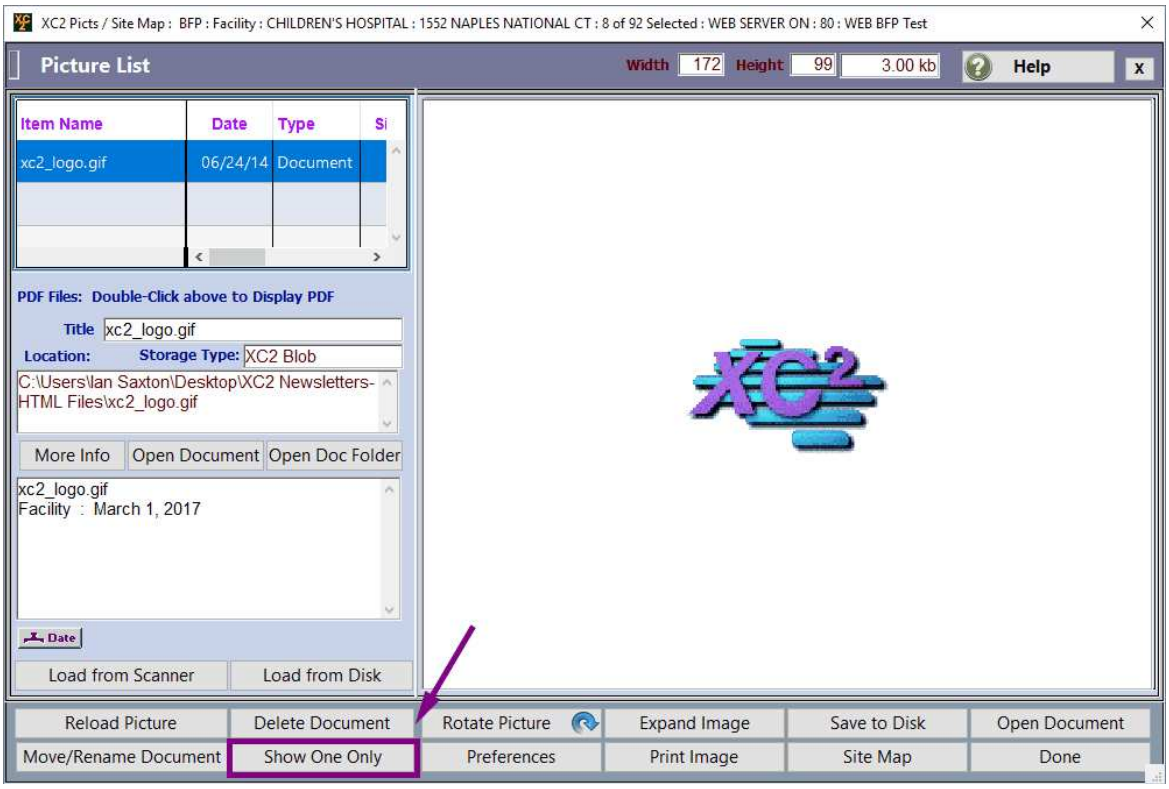
Open a record and click on the XC2 Picts area.



Notes:

Multi Image to 1 Image

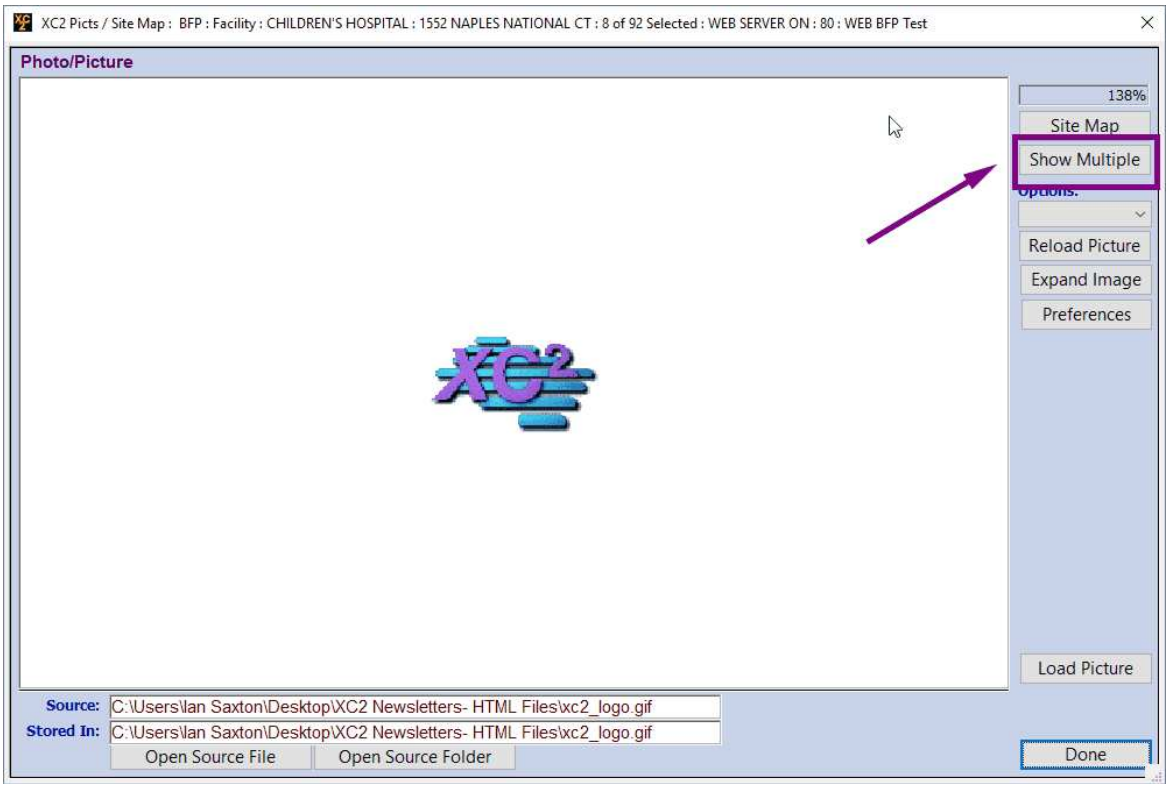
If you the multi image screen is showing click show one only to switch



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

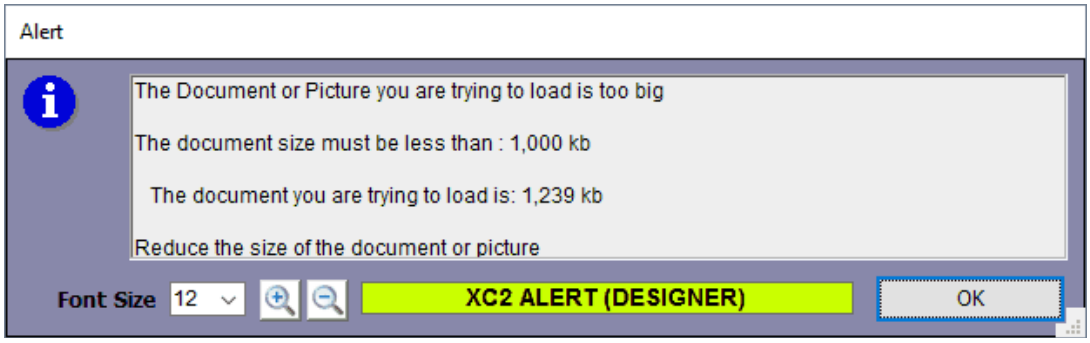
You can set XC2 to warn You when the data image you are uploading is very large. This page describes how to do that.

Warning

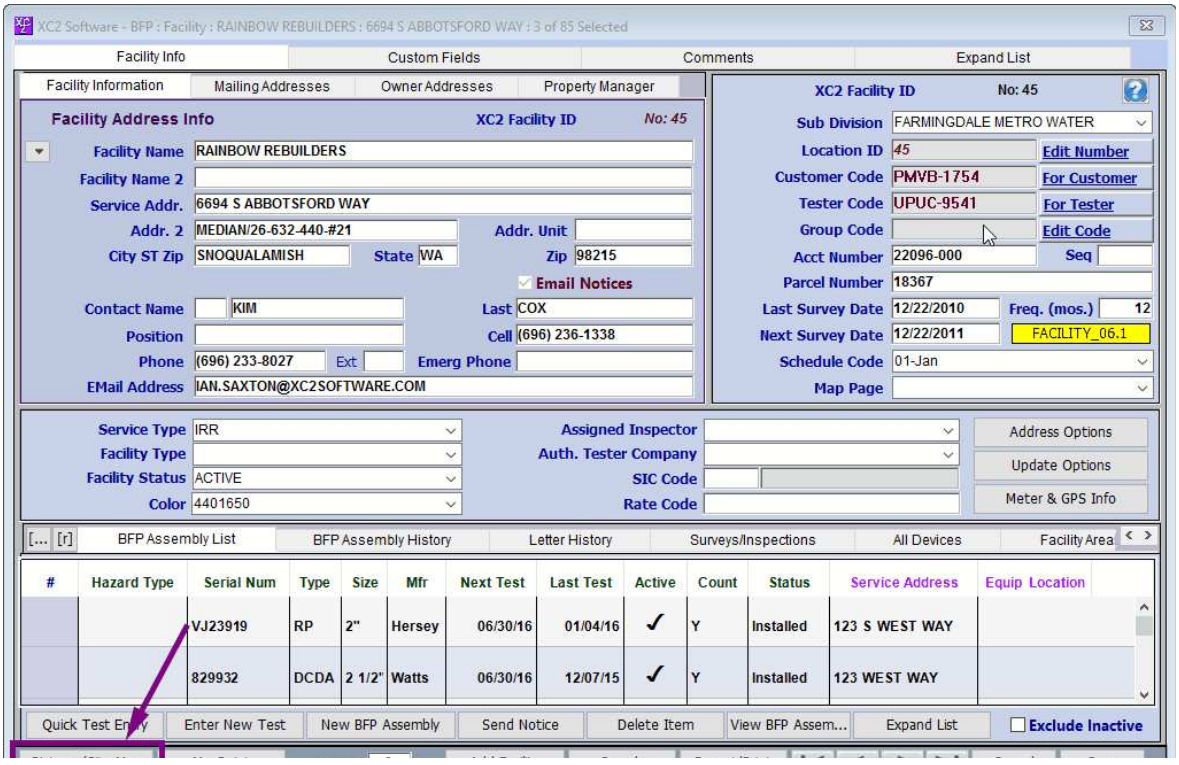
Modern Cameras can take some very nice photos but often (even if using a cell phone) the pictures can be quite large.

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.

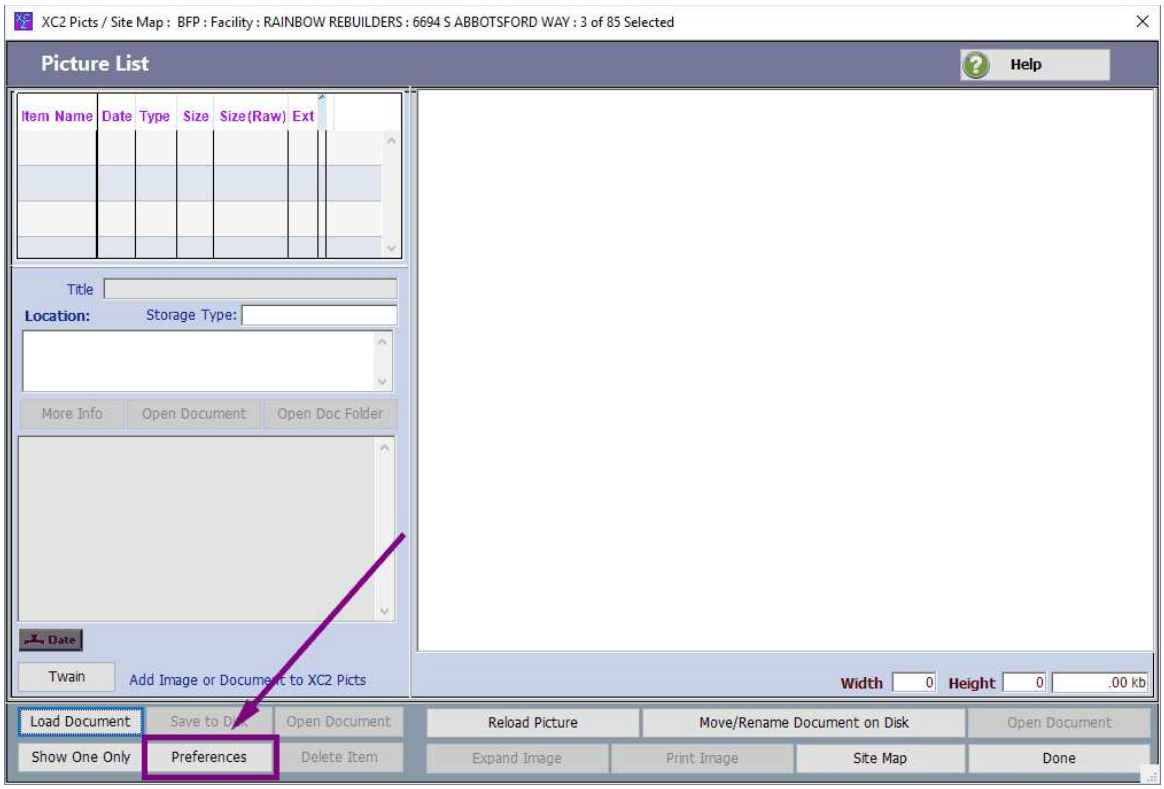
To help prevent uploading large image files, you can set a Image Warning message and set the maximum image size available to upload.



Open XC2 Picts

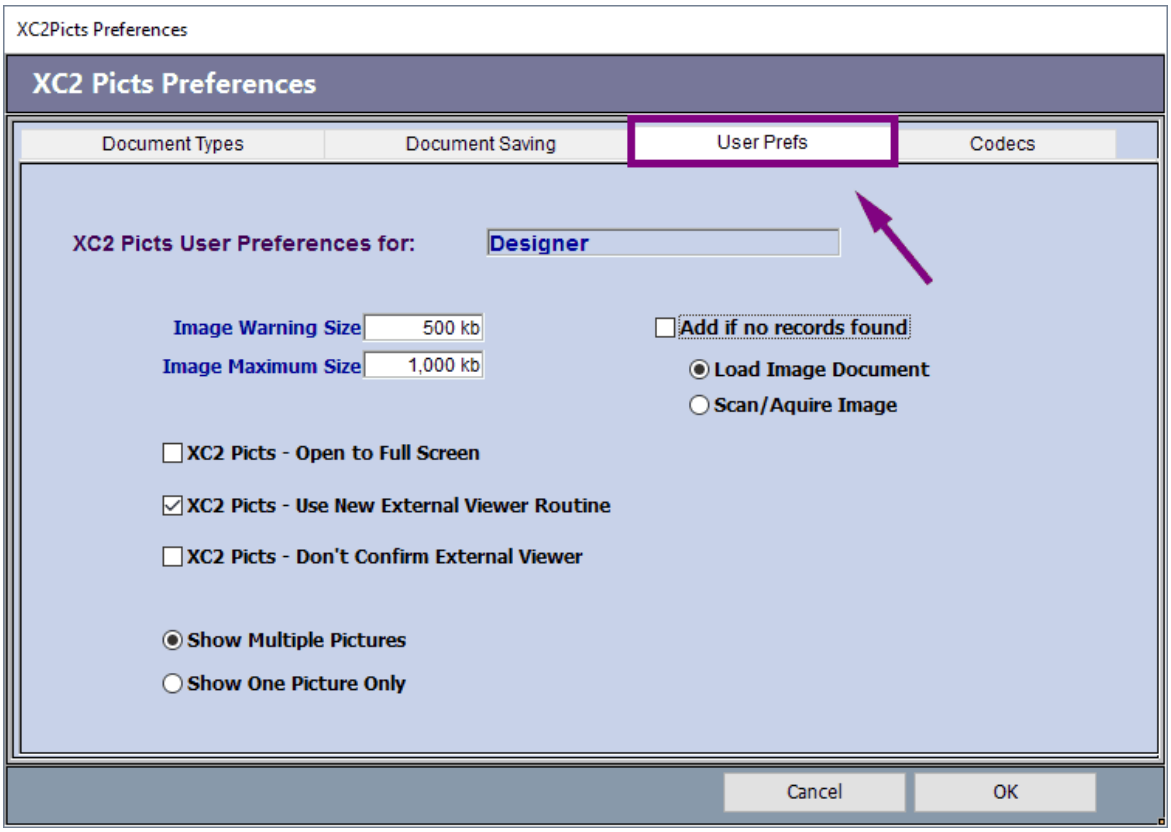


Open Preferences



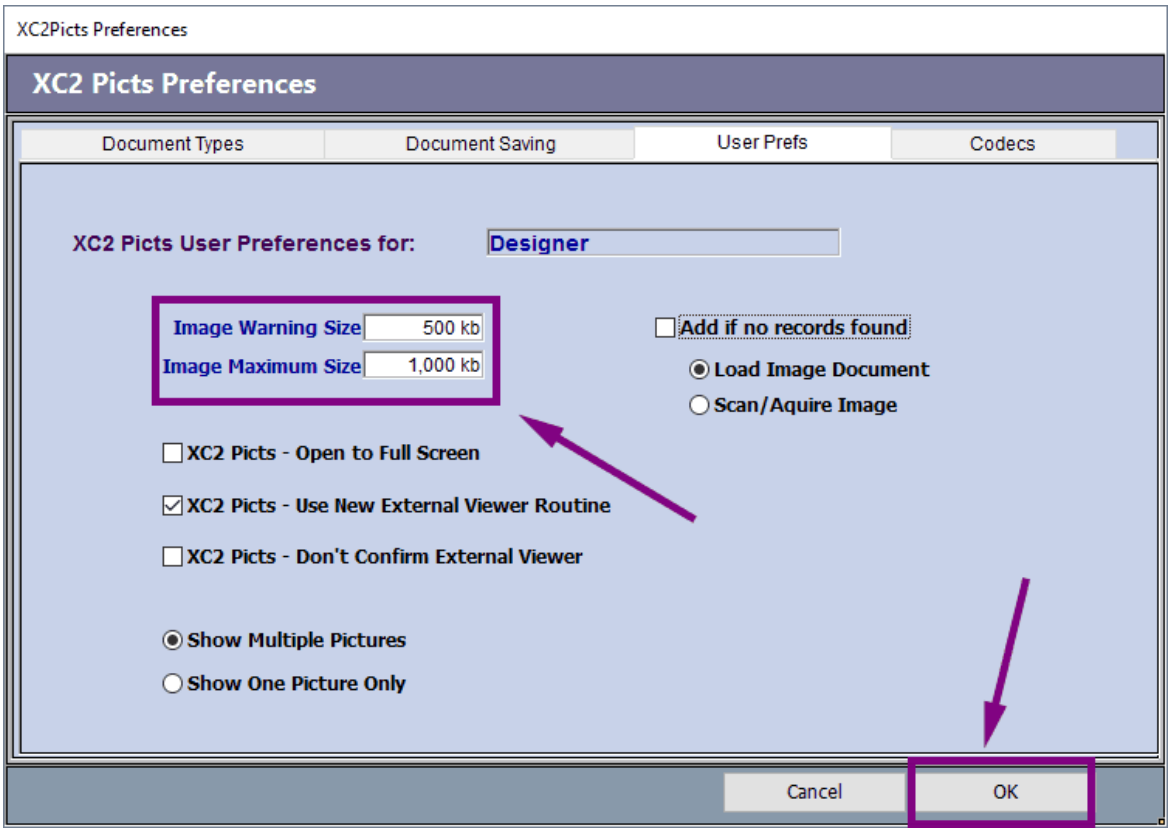
Notes:

User Preferences Tab



Notes:

Change Size



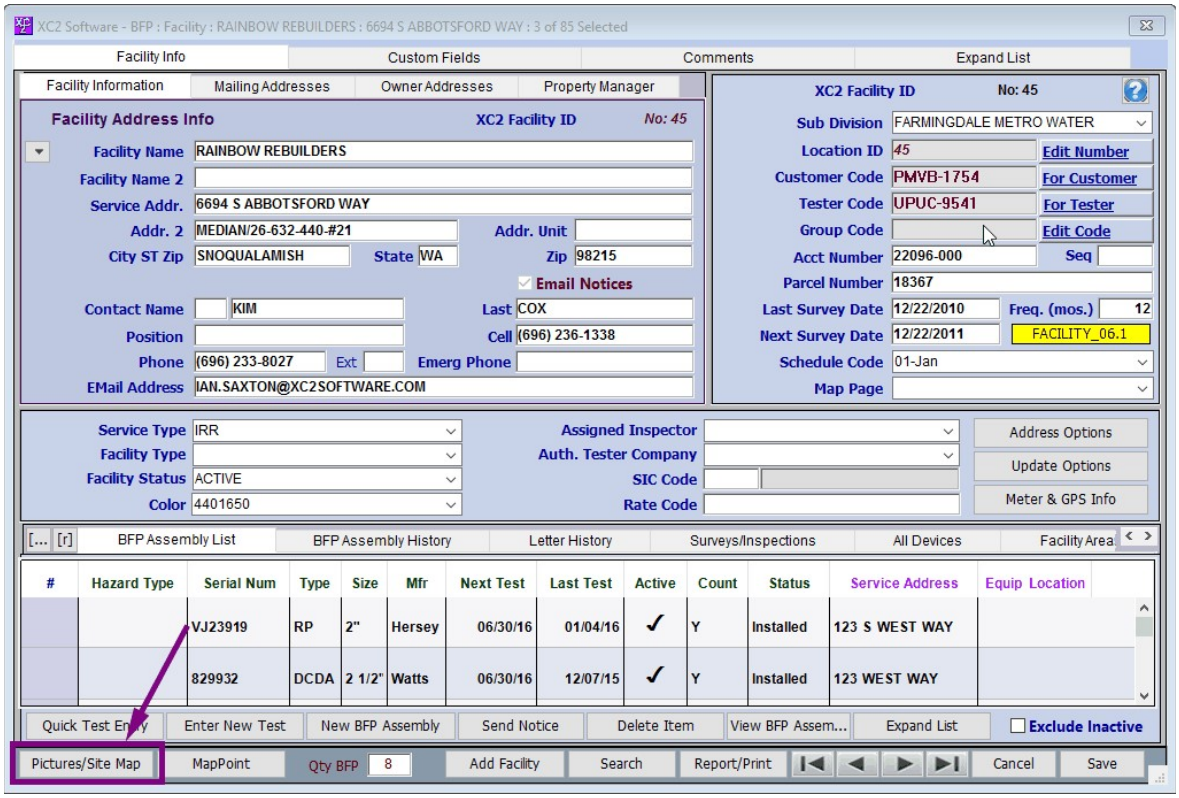
Notes:

XC2 Picts - Open Full Screen

KB Asset ID: 3643

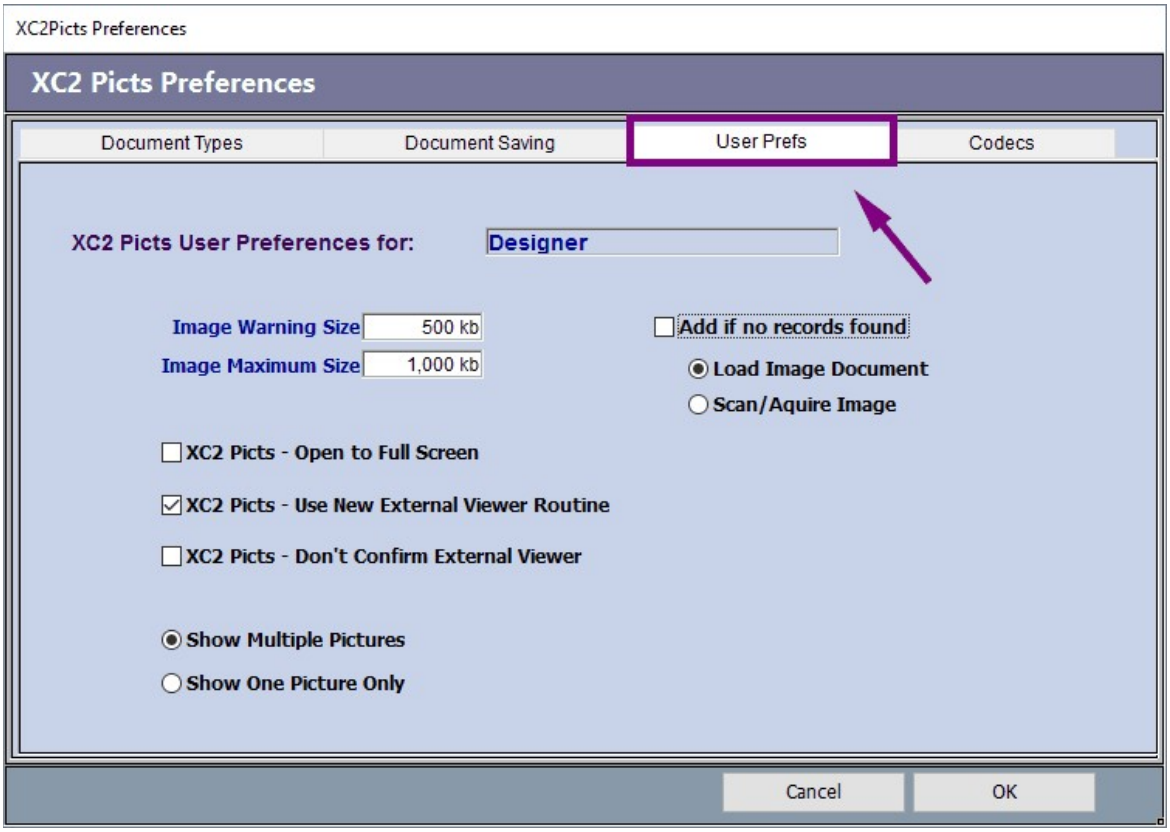
You can have XC2 picts open to a full screen or open to a smaller moveable window.

Open XC2 Picts



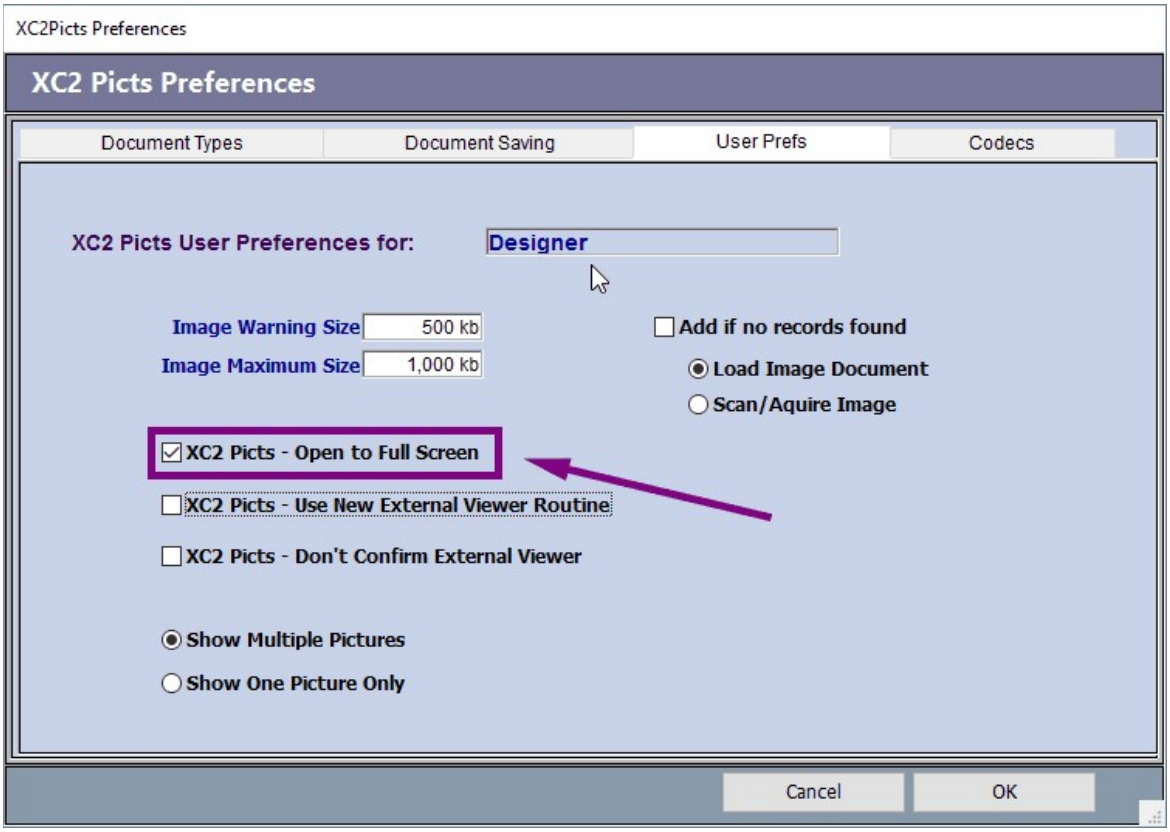
Notes:

User Preferences



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

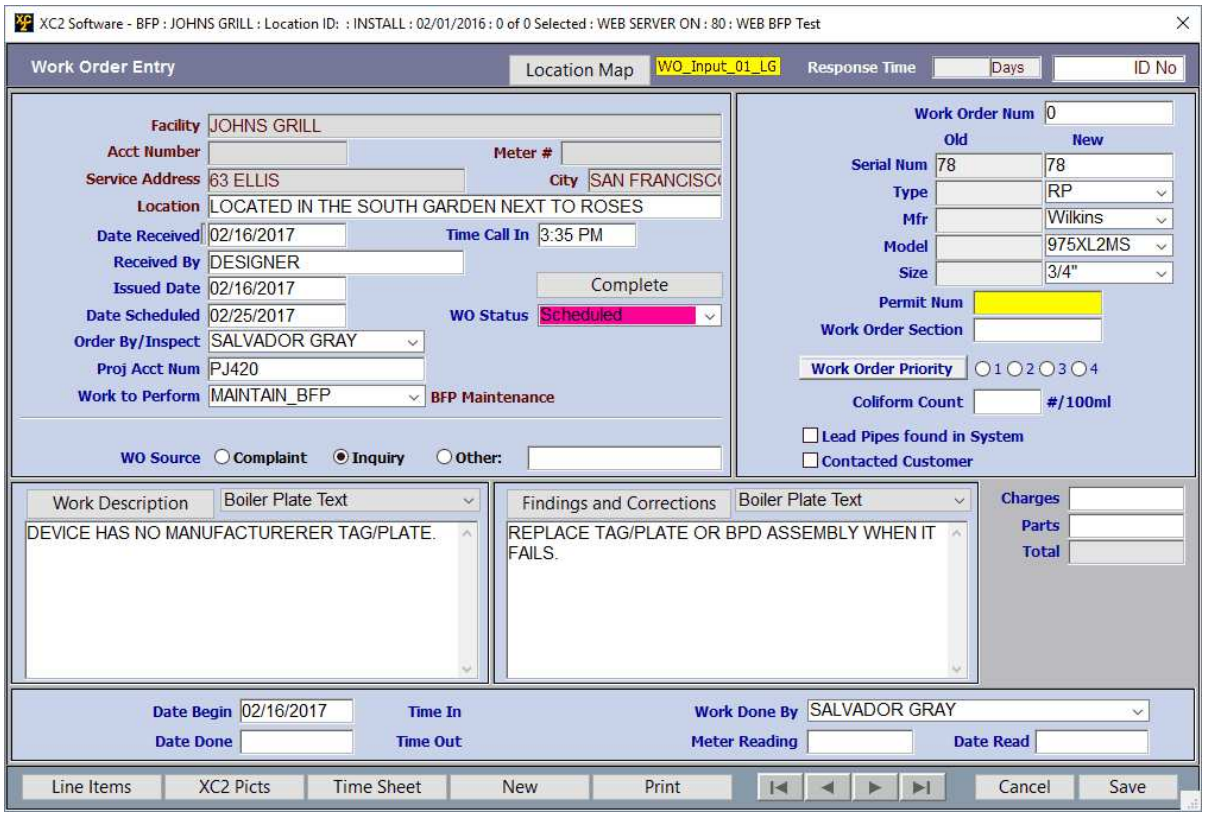
KB Asset ID: 3634

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

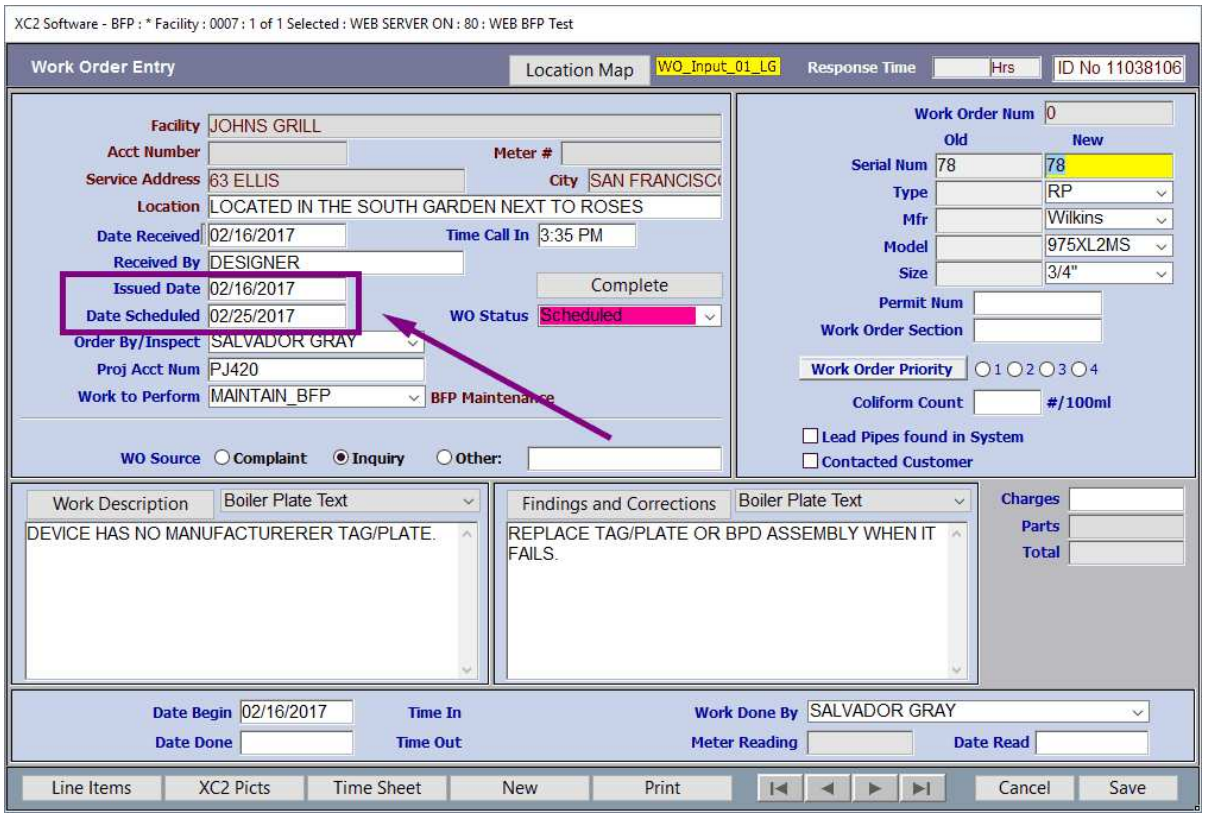


Notes:

Issued Date

This is the Date the Work Order was Issued

Notice the Sceduled date as well



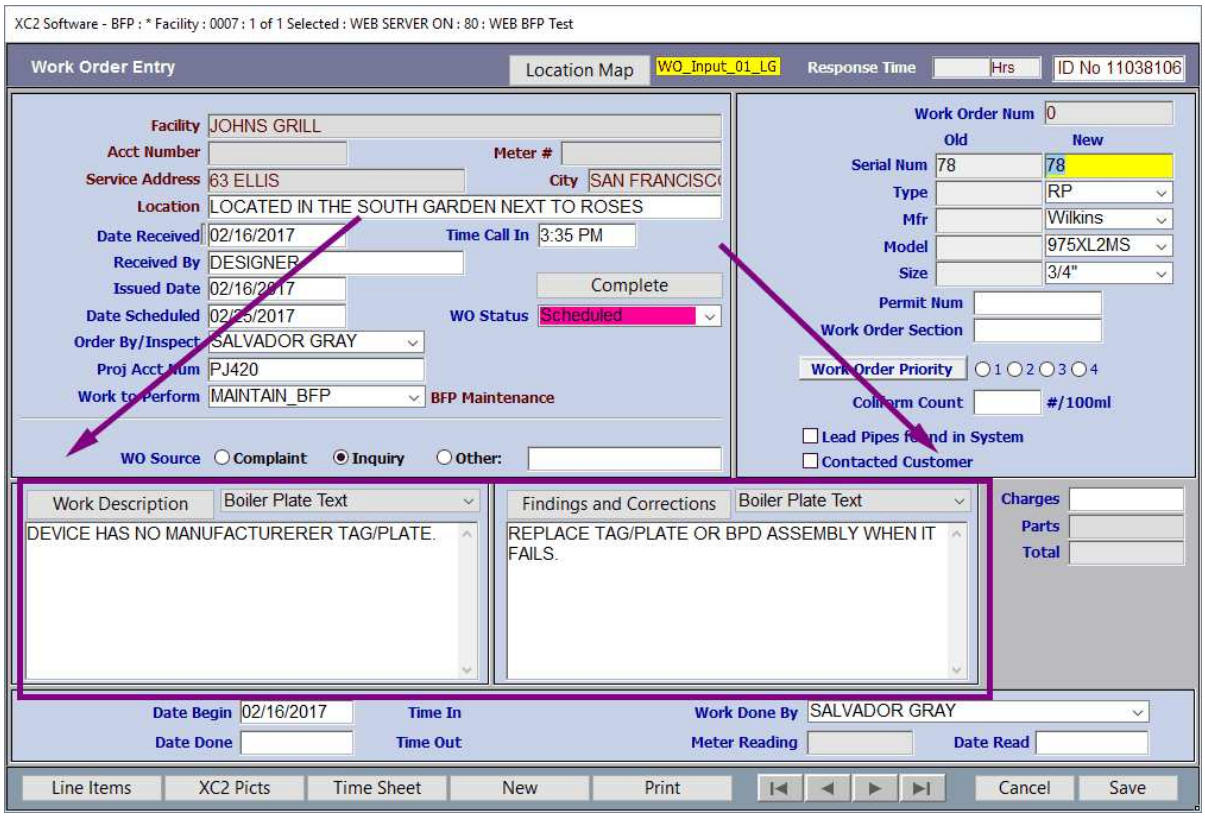
Notes:

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

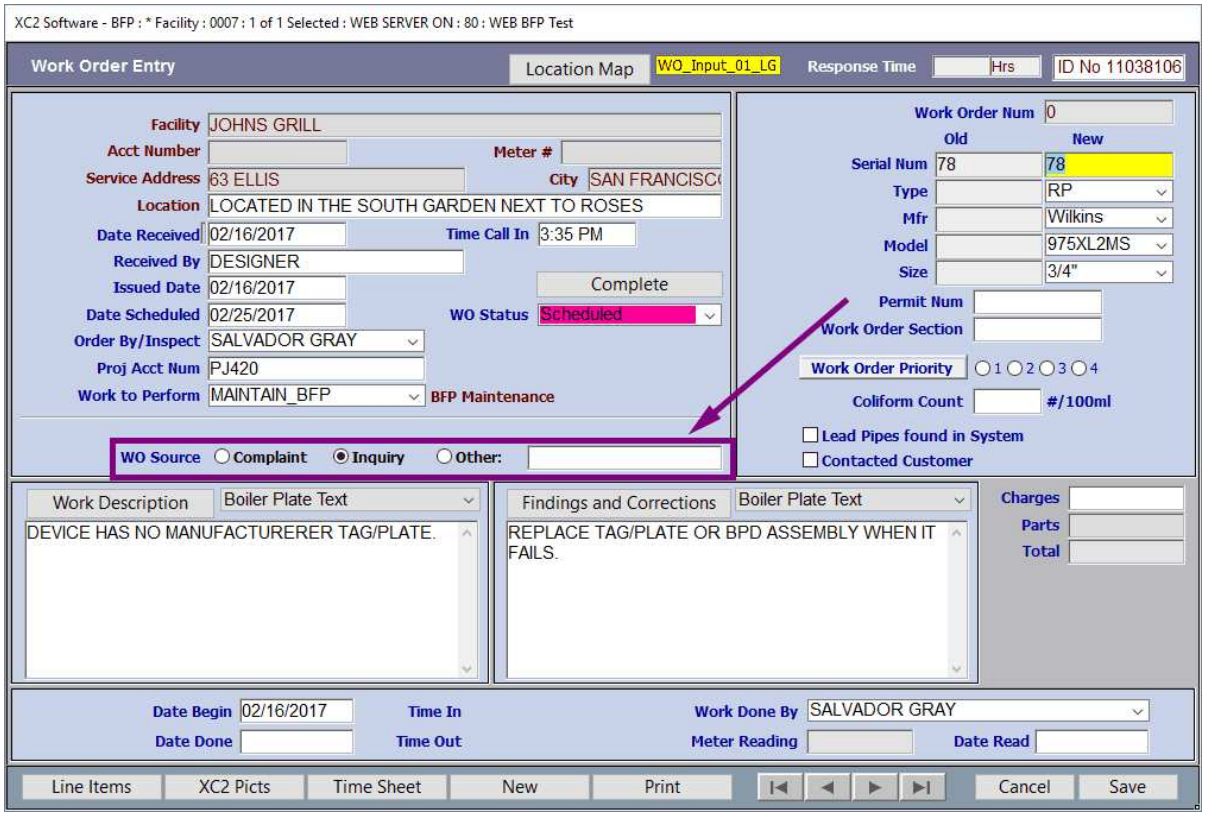


Notes:

Reporting

How was this reported?

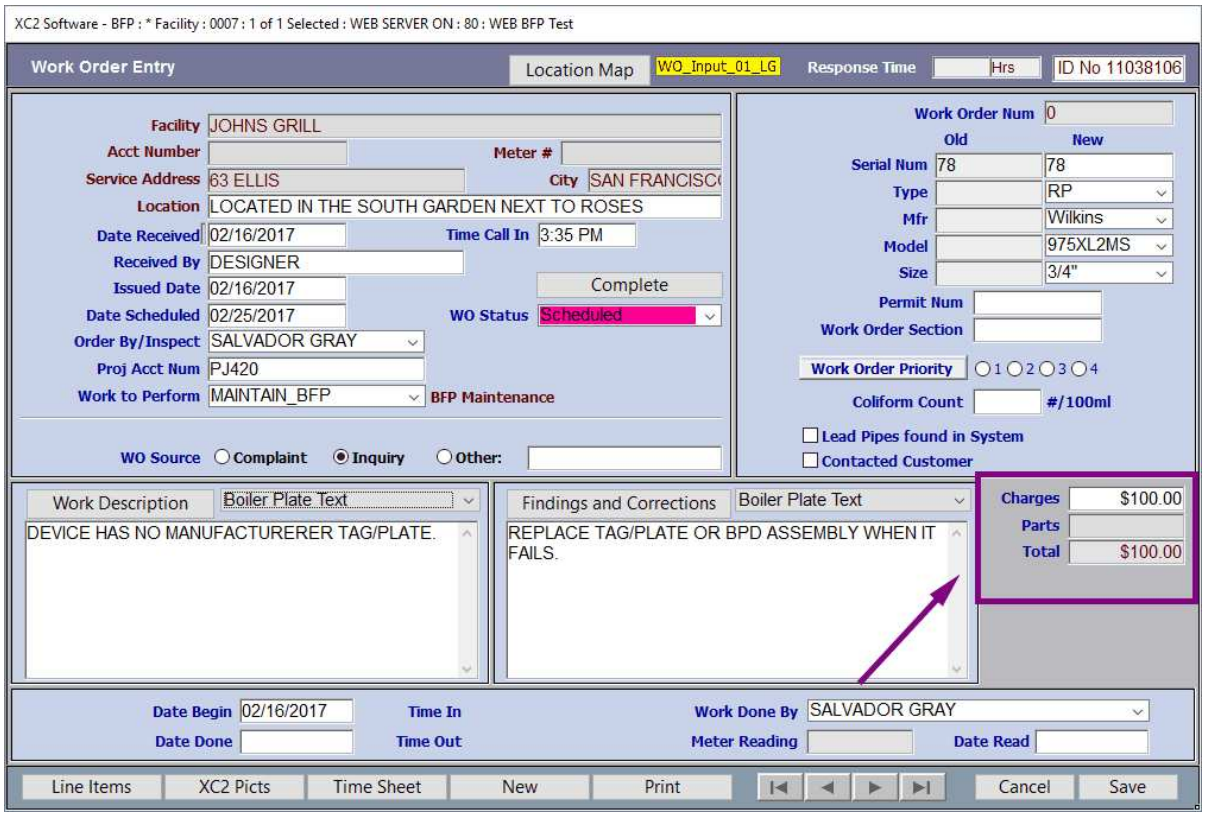
Do you have to contact someone?



Notes:

Charges

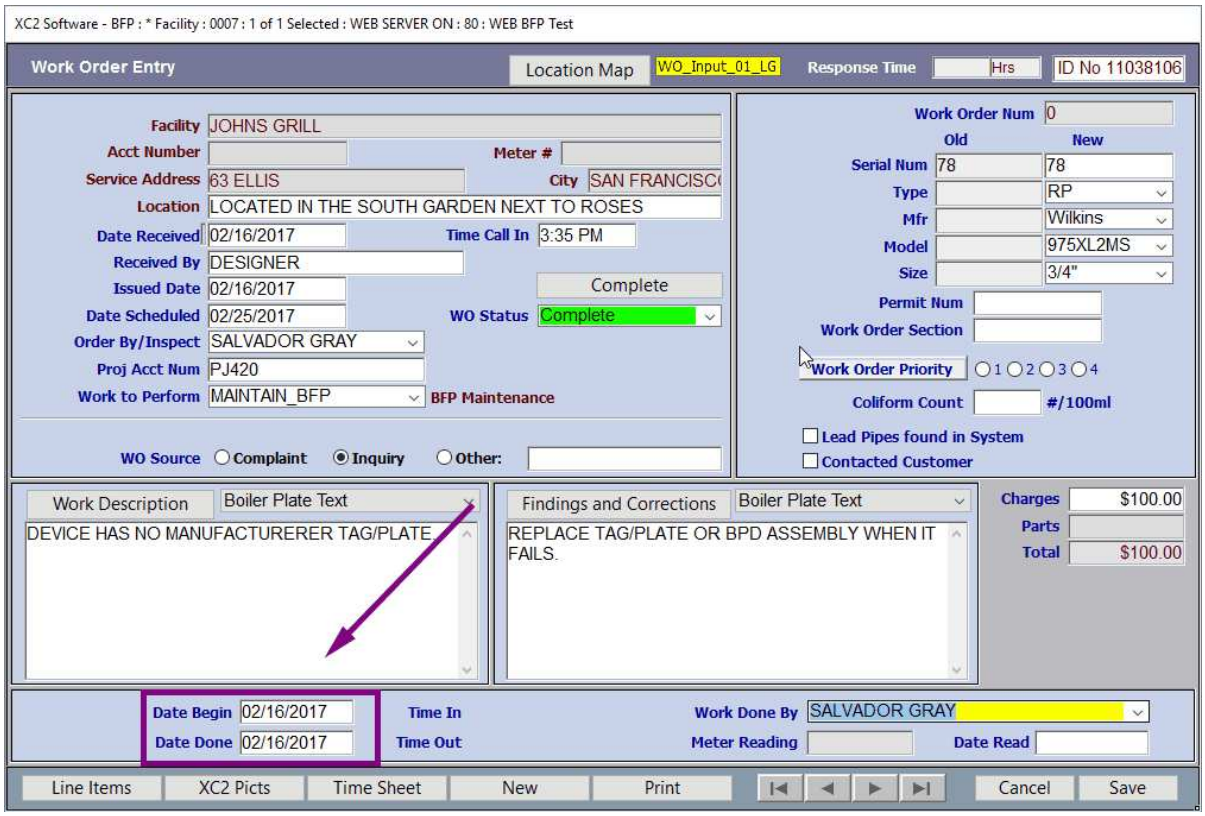
Are you going to charge?



Notes:

Dates

Start Date
Finish Date

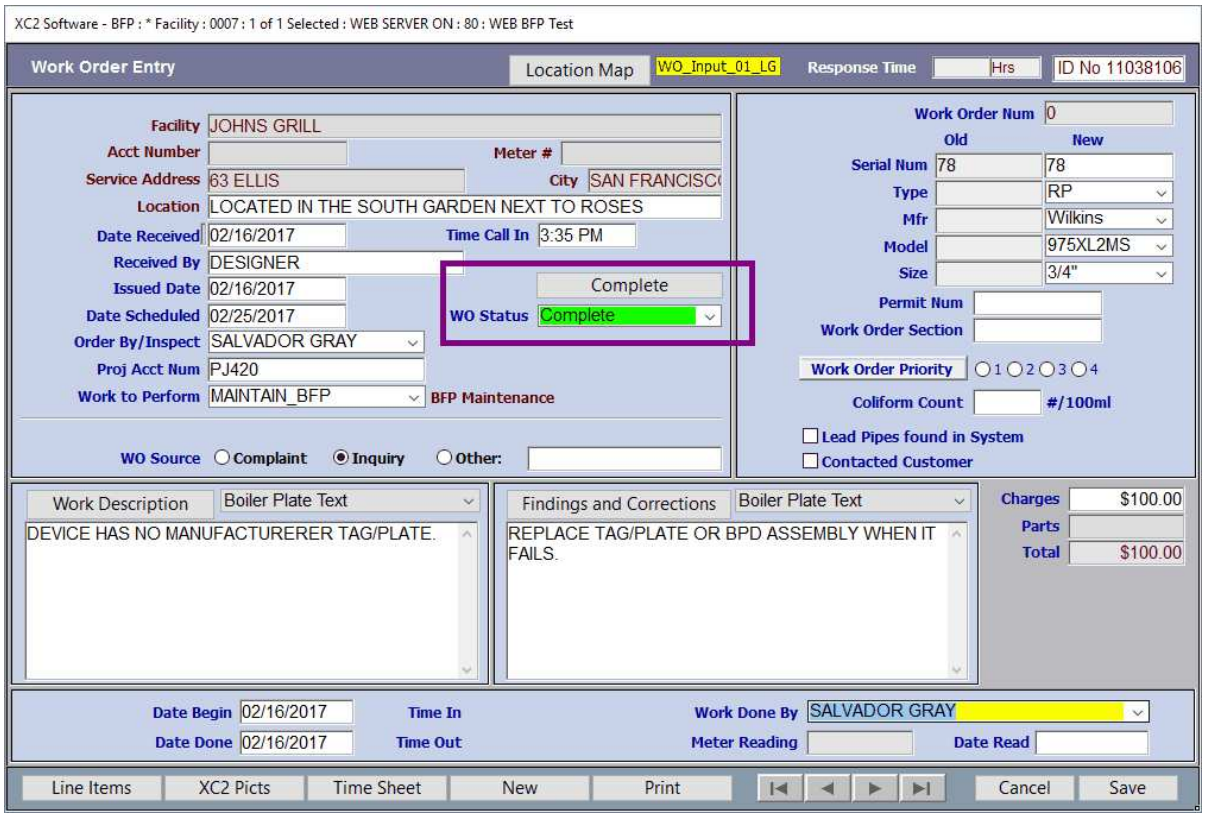


Notes:

Complete?

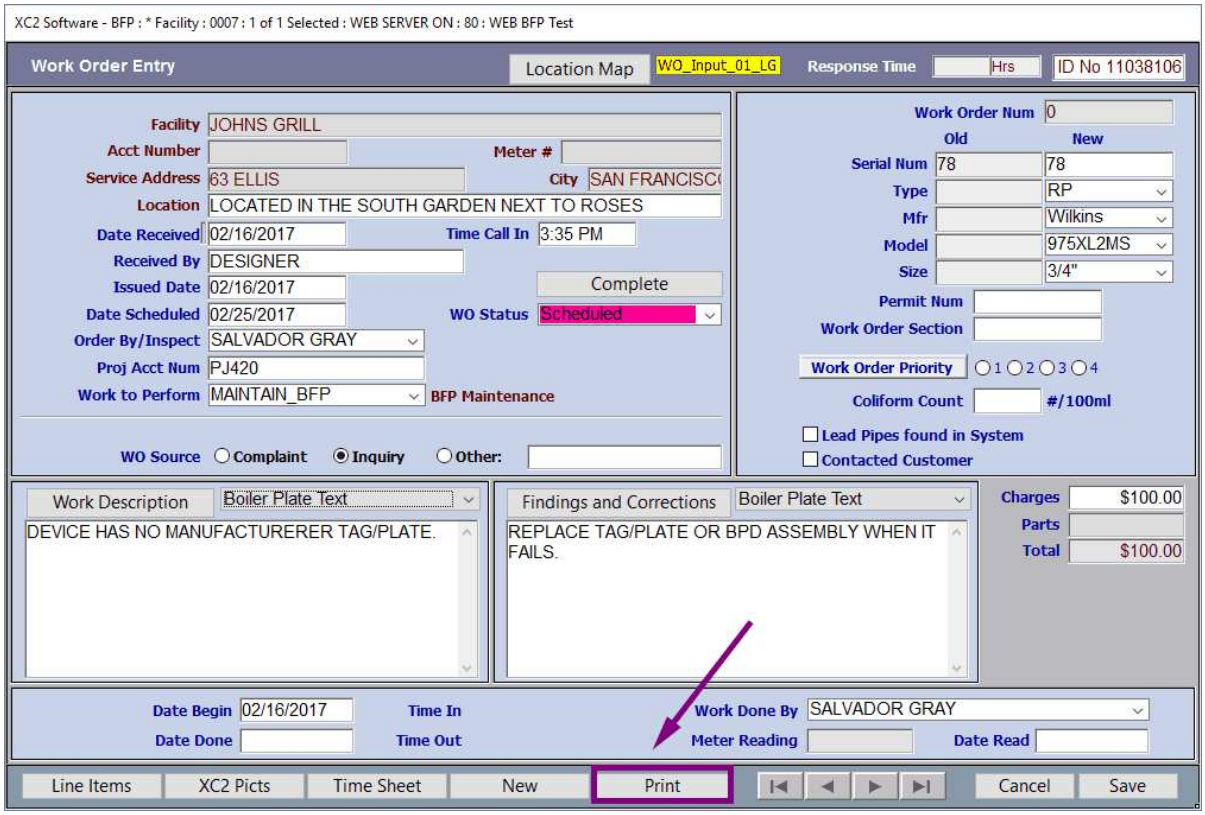
Change Status Here

If Complete you can clicke the button



Notes:

Print Work Order



Notes:

Work Order

WORK ORDER

City of Snoqualamish, WA

Date Printed: 02/16/17

Received by: DESIGNER

Date Received: 02/16/2017

Time Received: 3:35 PM

Order Number: 0

☐ Contacted Customer

Source: ☐ Complaint ☒ Inquiry ☐ Other Inquiry

Priority: ☐ 1 ☐ 2 ☐ 3 ☐ 4

Acct Number: schedule code :

Service Address: 63 ELLIS

SAN FRANCISCO Location ID :

Addr. 2 Map Page :

Customer Name: JOHNS 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 Coliform Count

REPLACE TAG/PLATE OR BPD ASSEMBLY WHEN IT FAILS.

Labor Information

Begin Time:

Done Time:

Actual Hrs:

Crew Size:

Tot. Labor Hrs.

Pipe Installation Size: Feet:

Work Done By: SALVADOR GRAY

Begin Date: 02/16/2017 Done Date: 02/16/2017

H20 Discharge/Leakage

Rate (GPM)

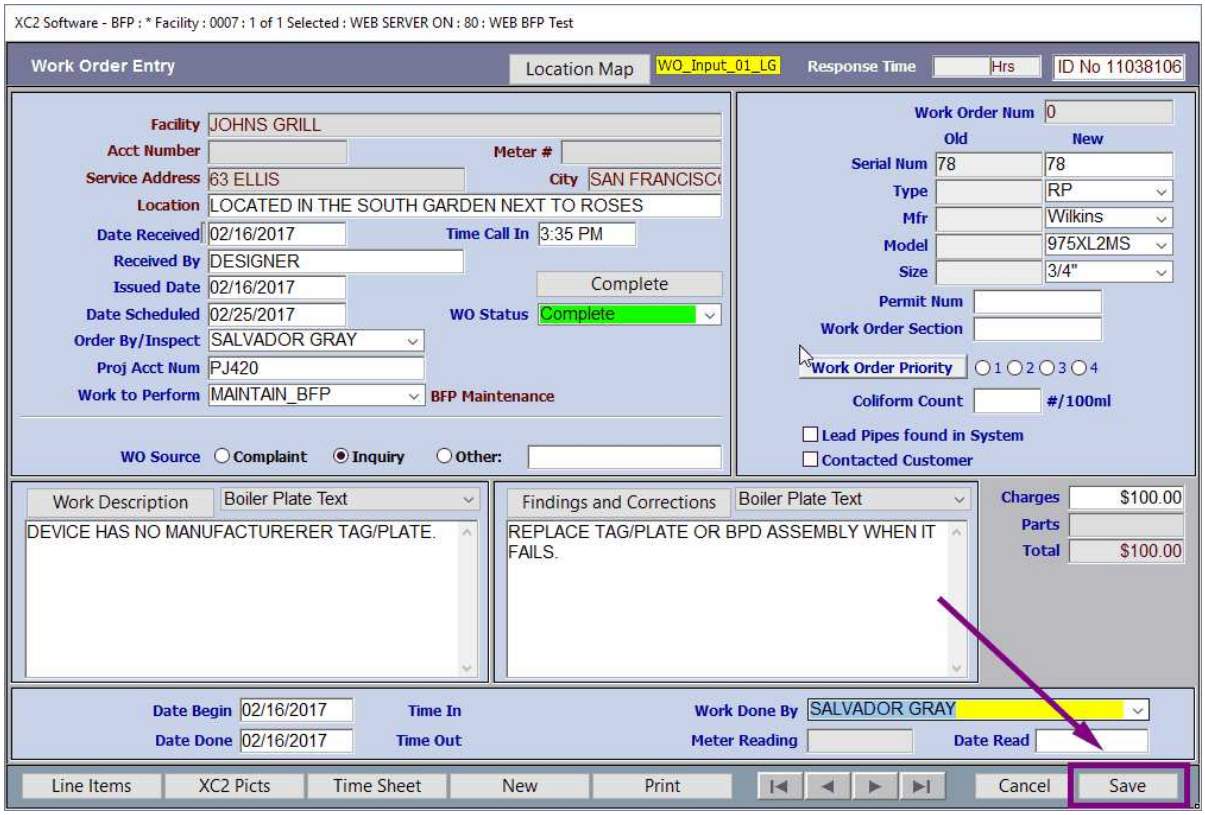
Duration:

☐ Contacted Customer ? ☐ Work Order Complete ?

rev.

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
Meter #
Service Address 63 ELLIS
City SAN FRANCISC
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
WO Source Complaint Inquiry Other:
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
Lead Pipes found in System
Contacted Customer
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:

XC2 Software Knowledge Base

Auto Generated Work Orders

KB Asset ID: 3528

When editing or creatin new backflow records, XC2 will display an dialog prompting from a responce from you.

Your responce will determine if a Work Order is generated and thus counted on reports like the year end compliance reports.

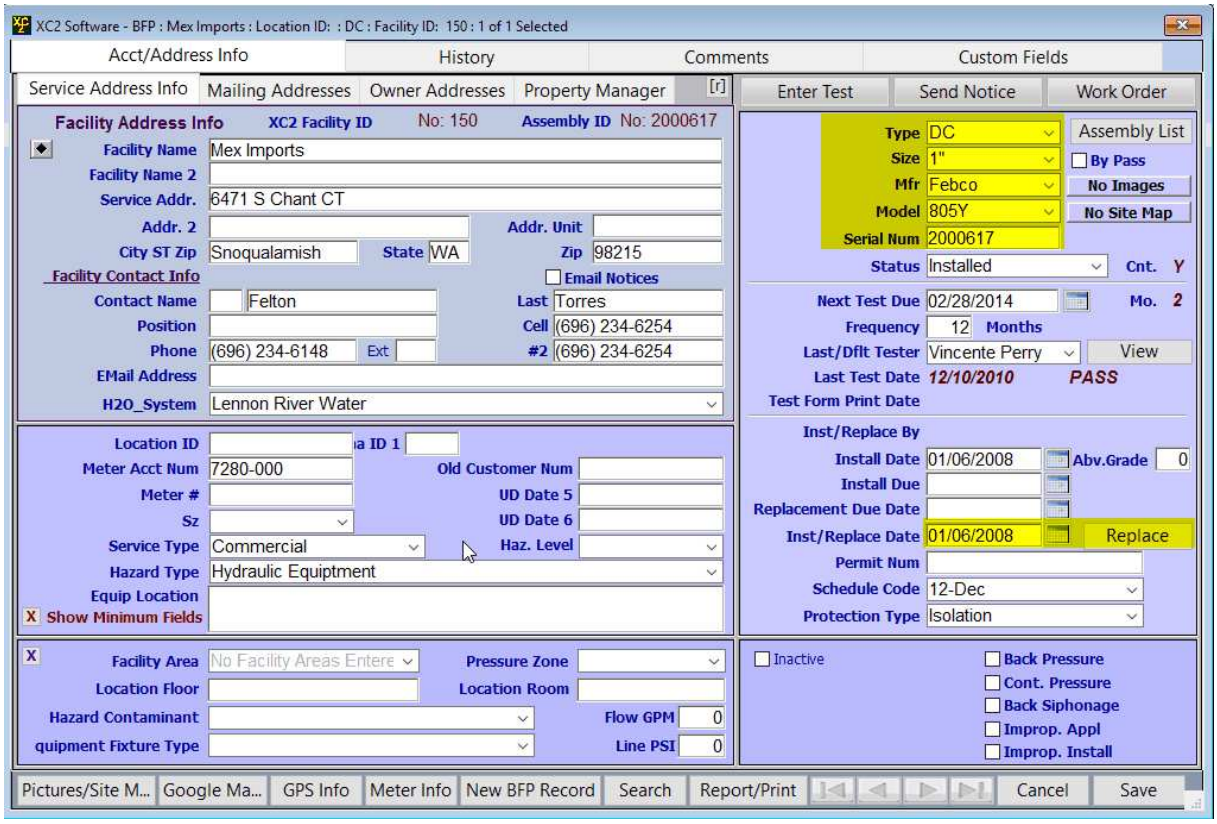
Creating a Work Order For Replacing a Device

Open an assembly record.

Either edit the device information

Or

Click the Replace buton



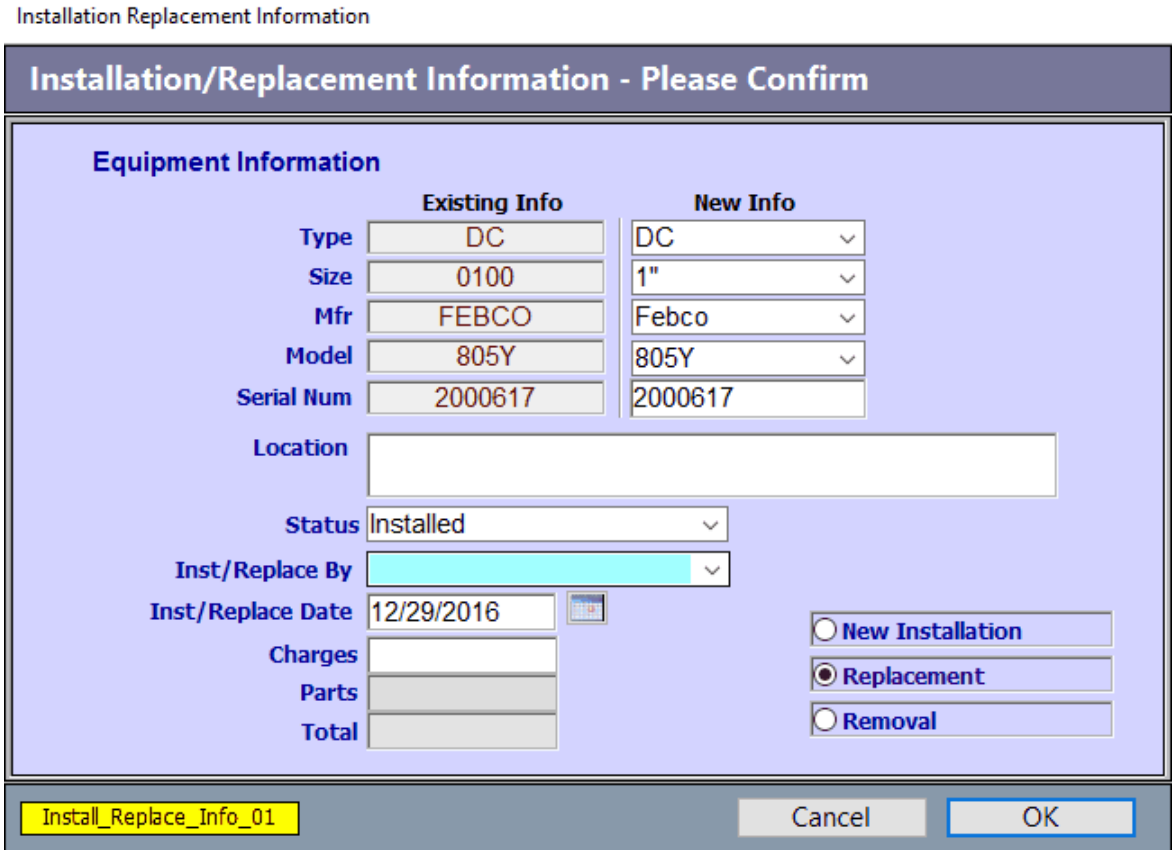
Notes:

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



Notes:

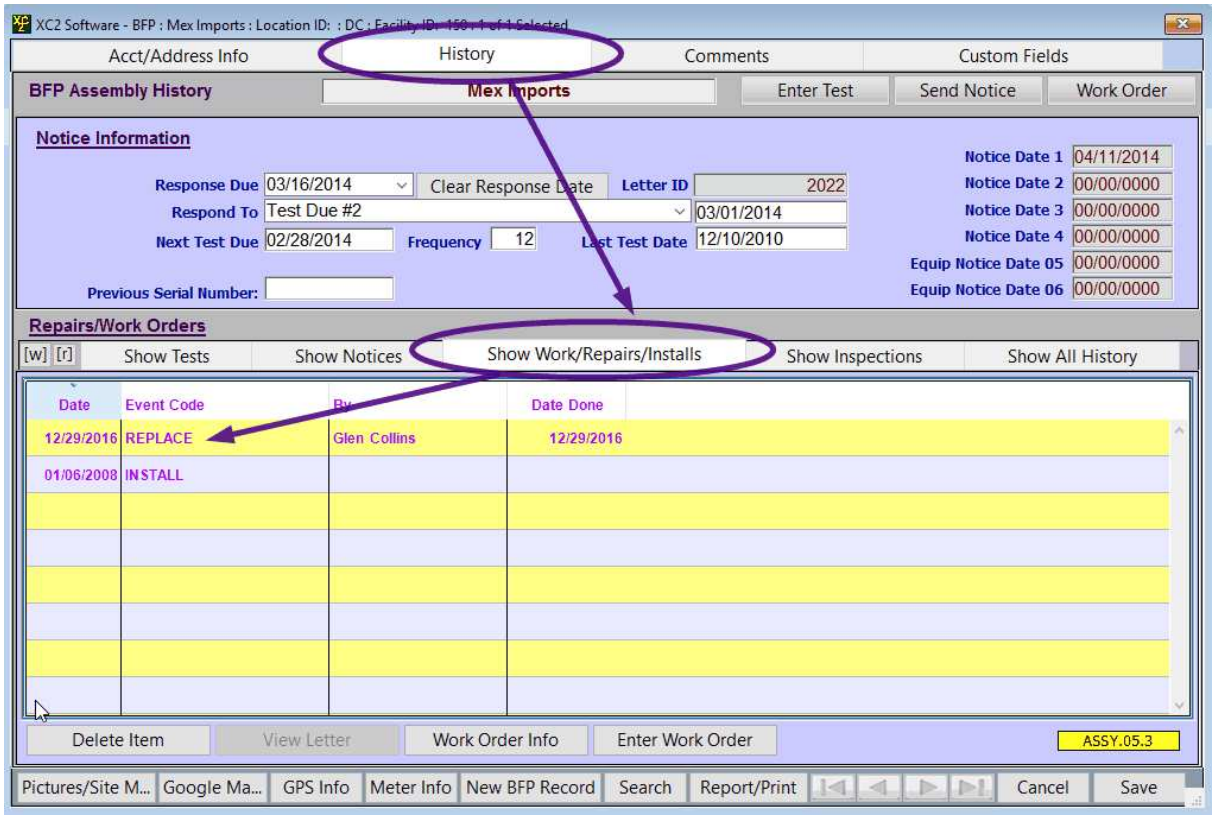
The Work Order Was Created

In the assembly record

Click the History tab

Click Show Work/Repairs/Installs tab

Here you will find the work order for the replacemant information change you made.



Notes:

XC2 Software Knowledge Base

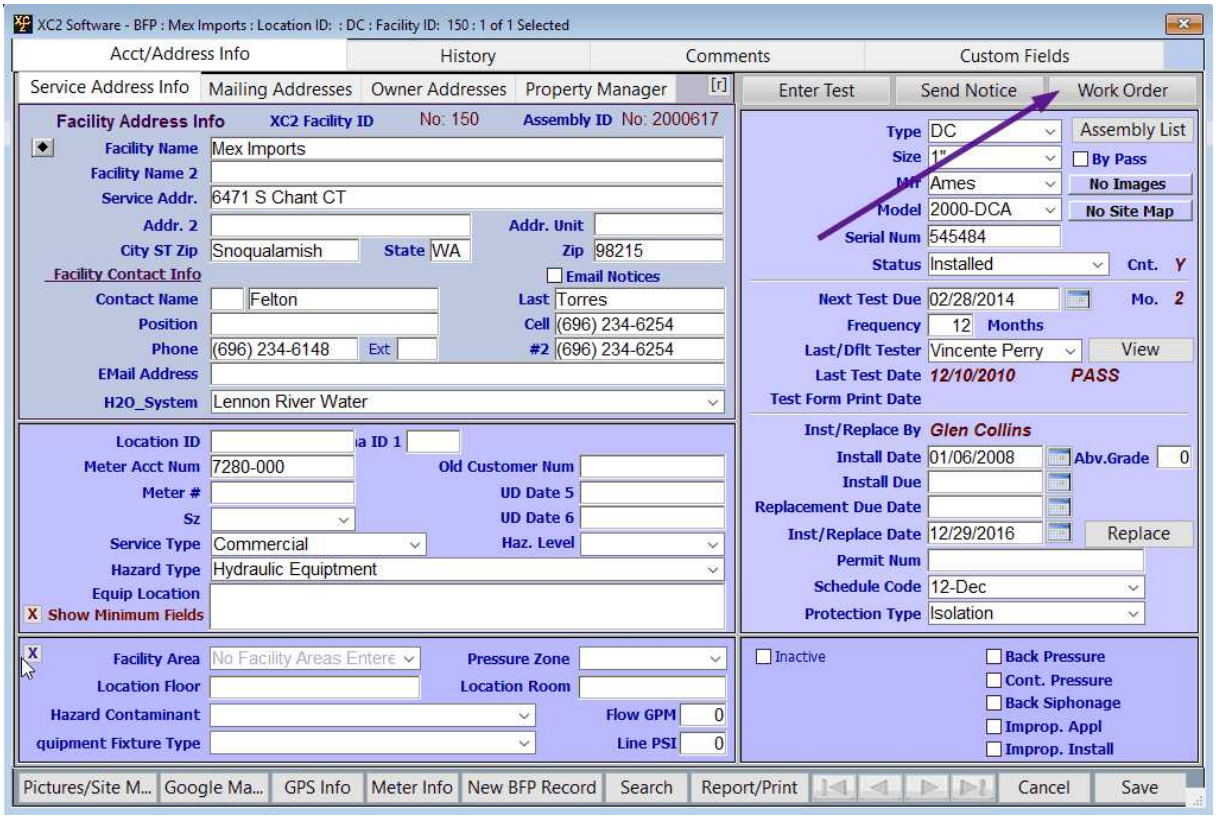
Manually Creating A New Work Order

KB Asset ID: 3529

Creatinf a Work Order from an assembly record

Open an Assembly Record

Click the Work Order button



Notes:

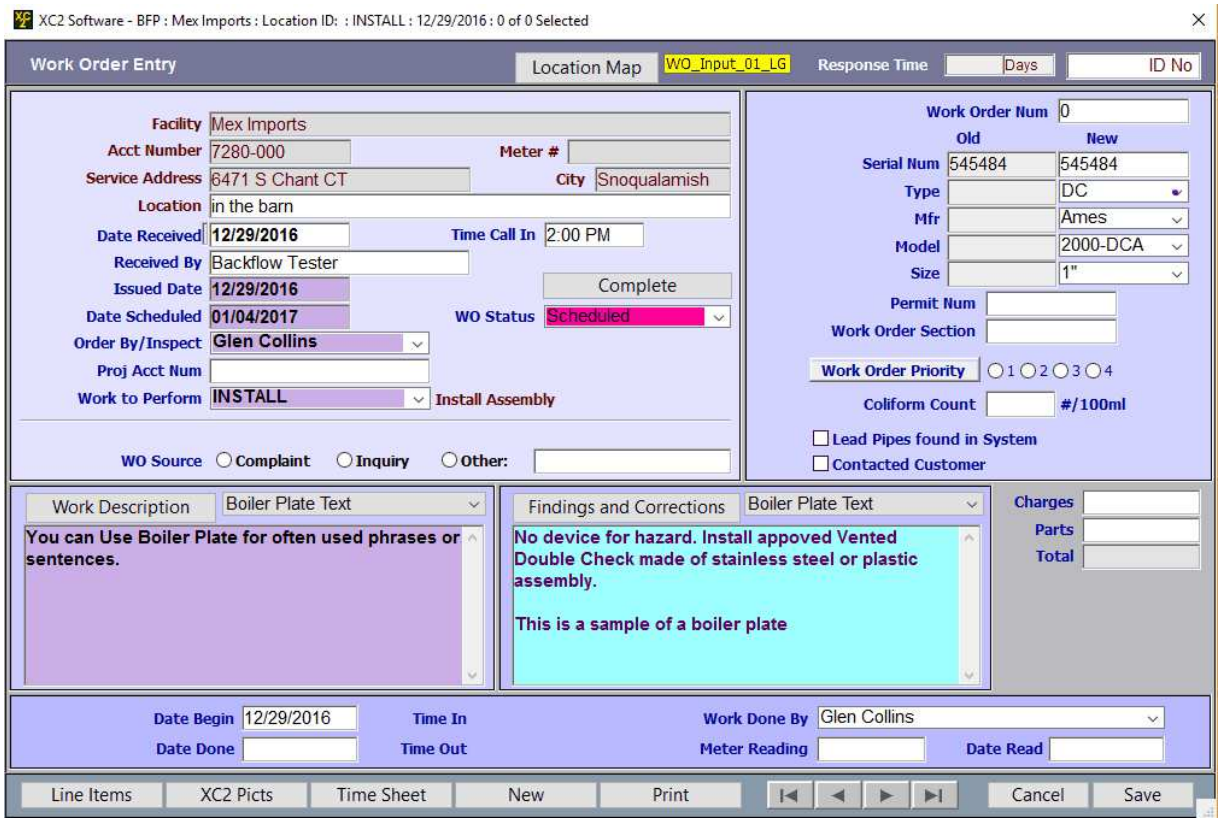
Creating The Work Order

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

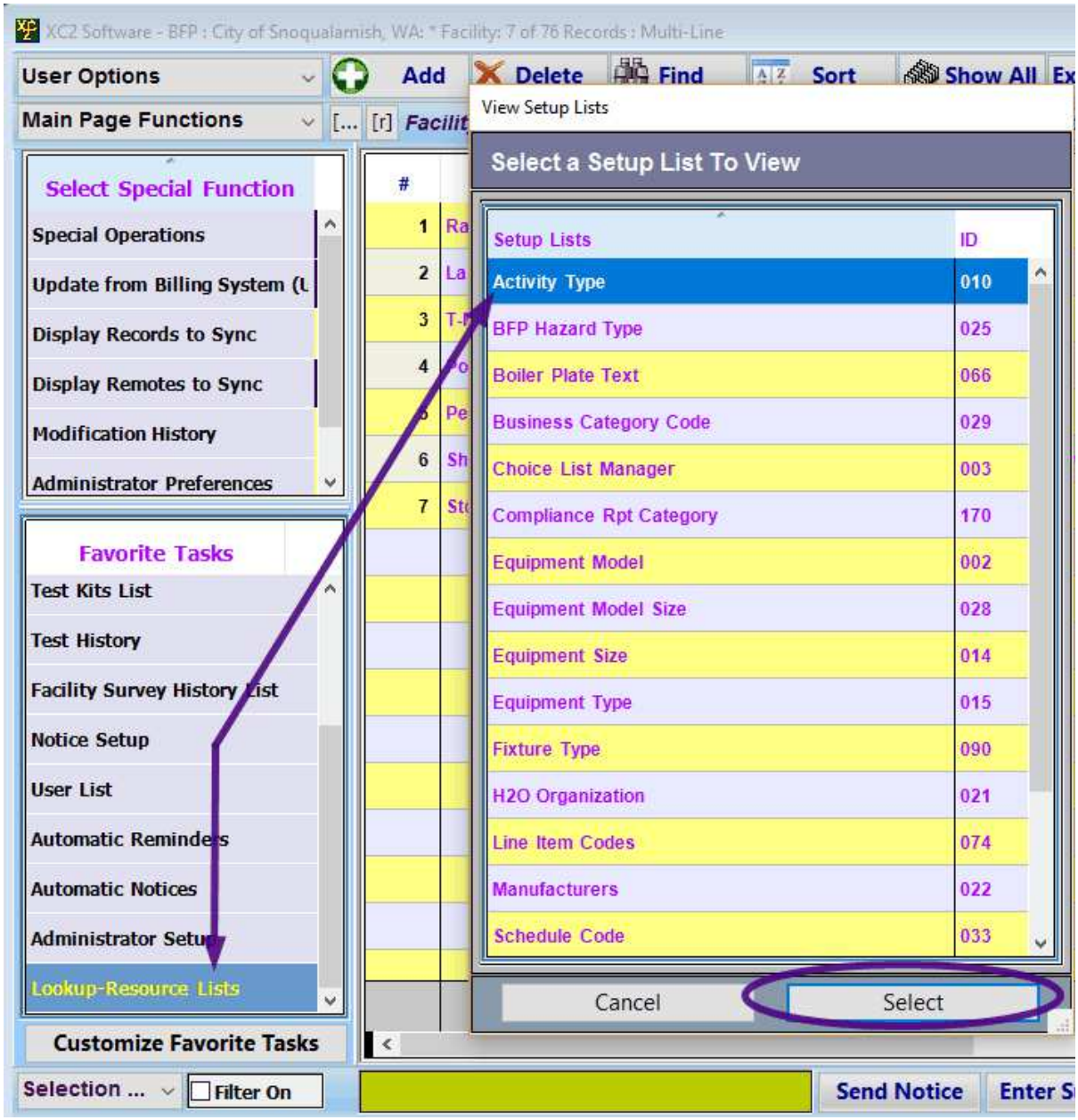
When you create a new work order, the type of work being perfomed is required.

Here you can create new work order job descriptions

Open the Lookup/Resource List

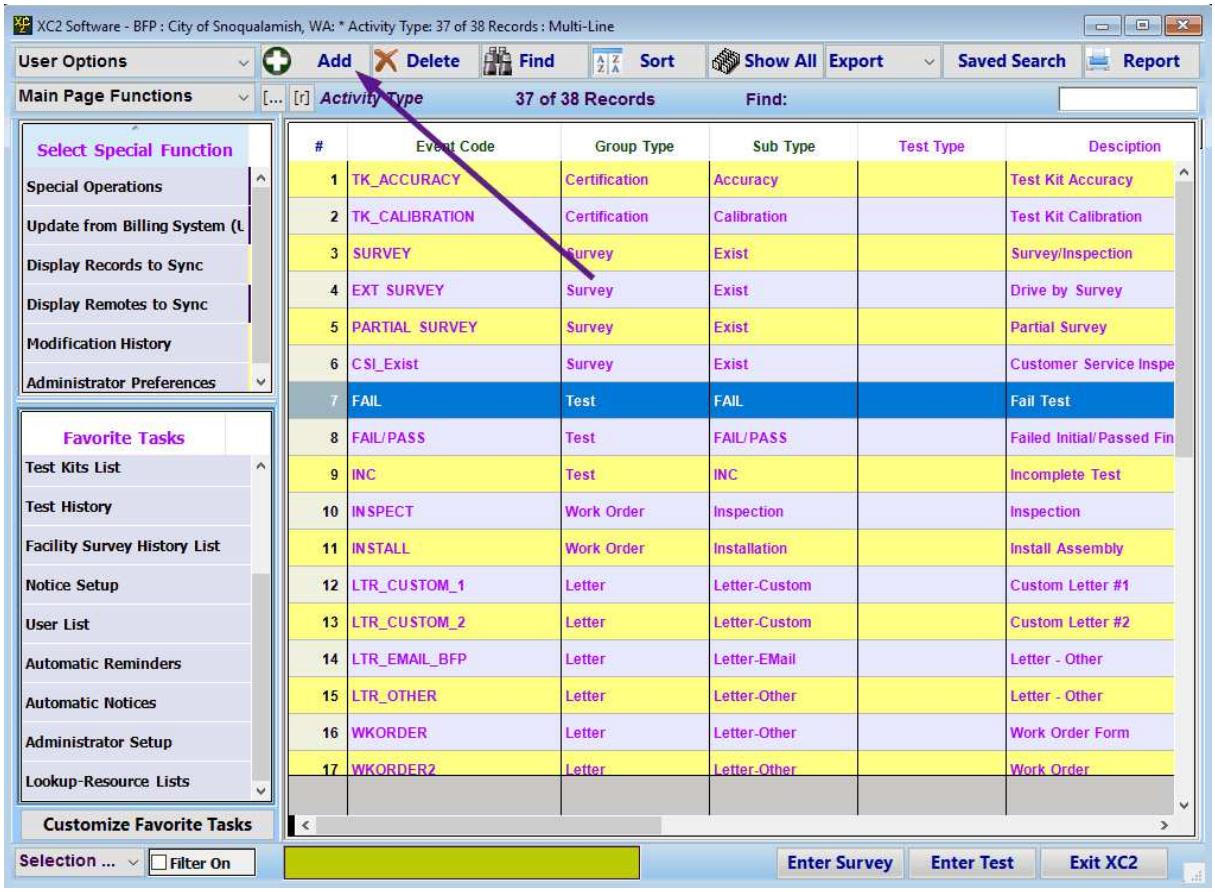
Click Activity Type

Click Select



Notes:

Click Add



#	Event Code	Group Type	Sub Type	Test Type	Desciption
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:

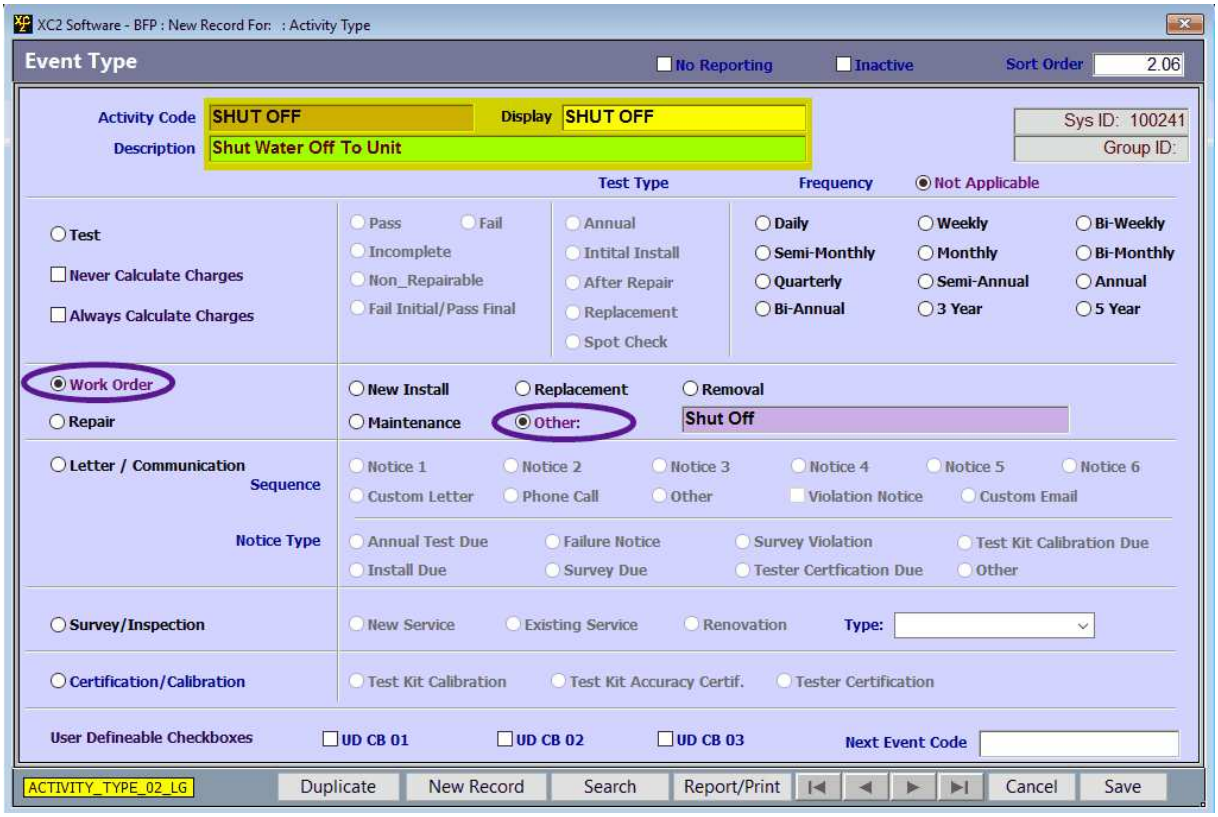
Create Work Order Job Decription

Enter Work OIrder Name and Description

Specify that Catagory Wor Order

If the work does not fit the standard gatgories listed, select Other.

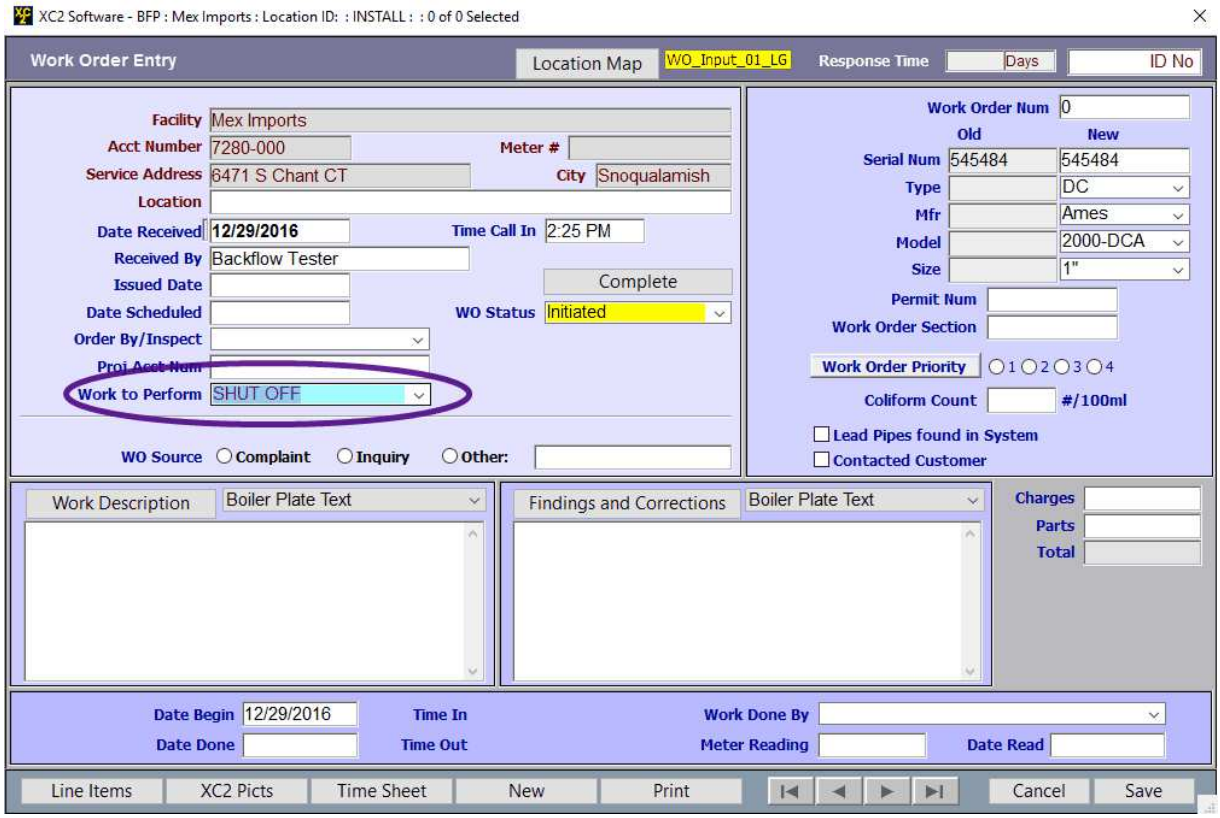
Click Save



Notes:

New Work Oder Created

YOur new work order decription is now available for selection



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

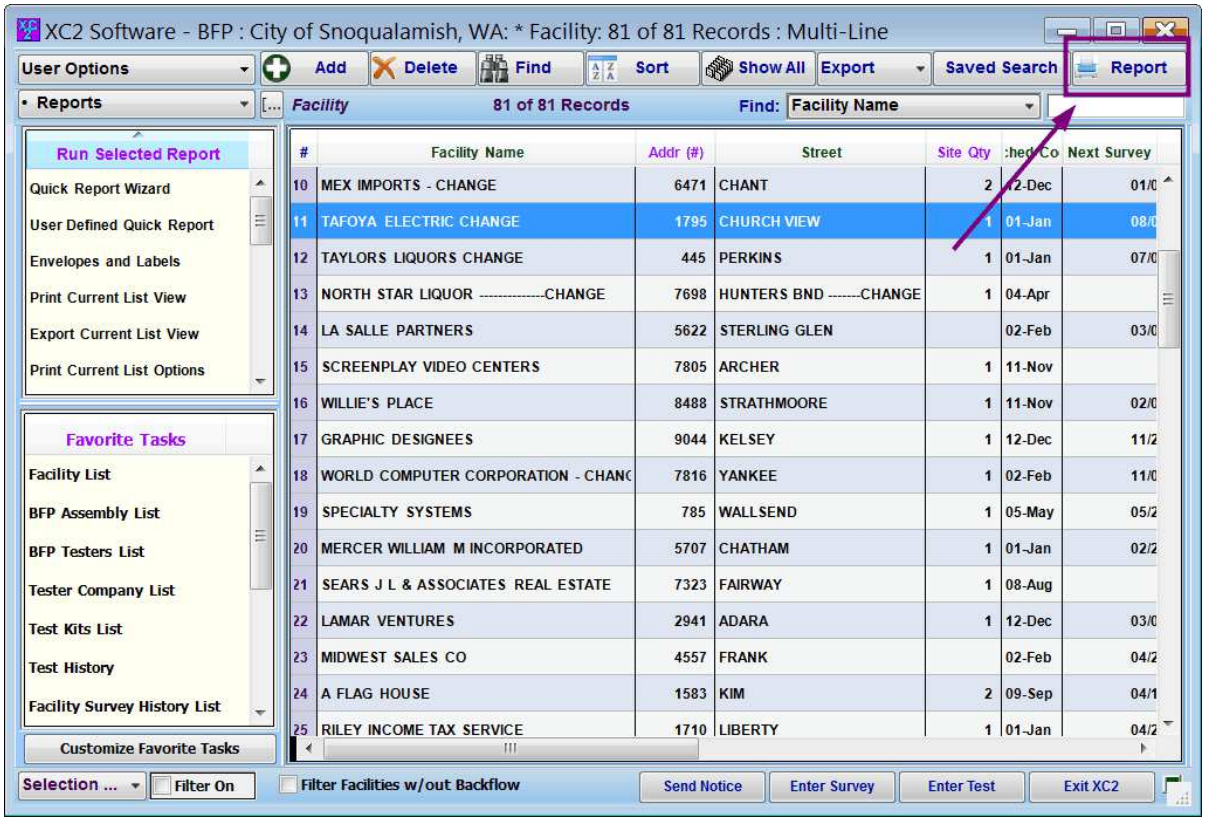
KB Asset ID: 2523

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.



Notes:

Confirm Action

You may receive a confirmation on how many records you would like to print.
Select one of the options:

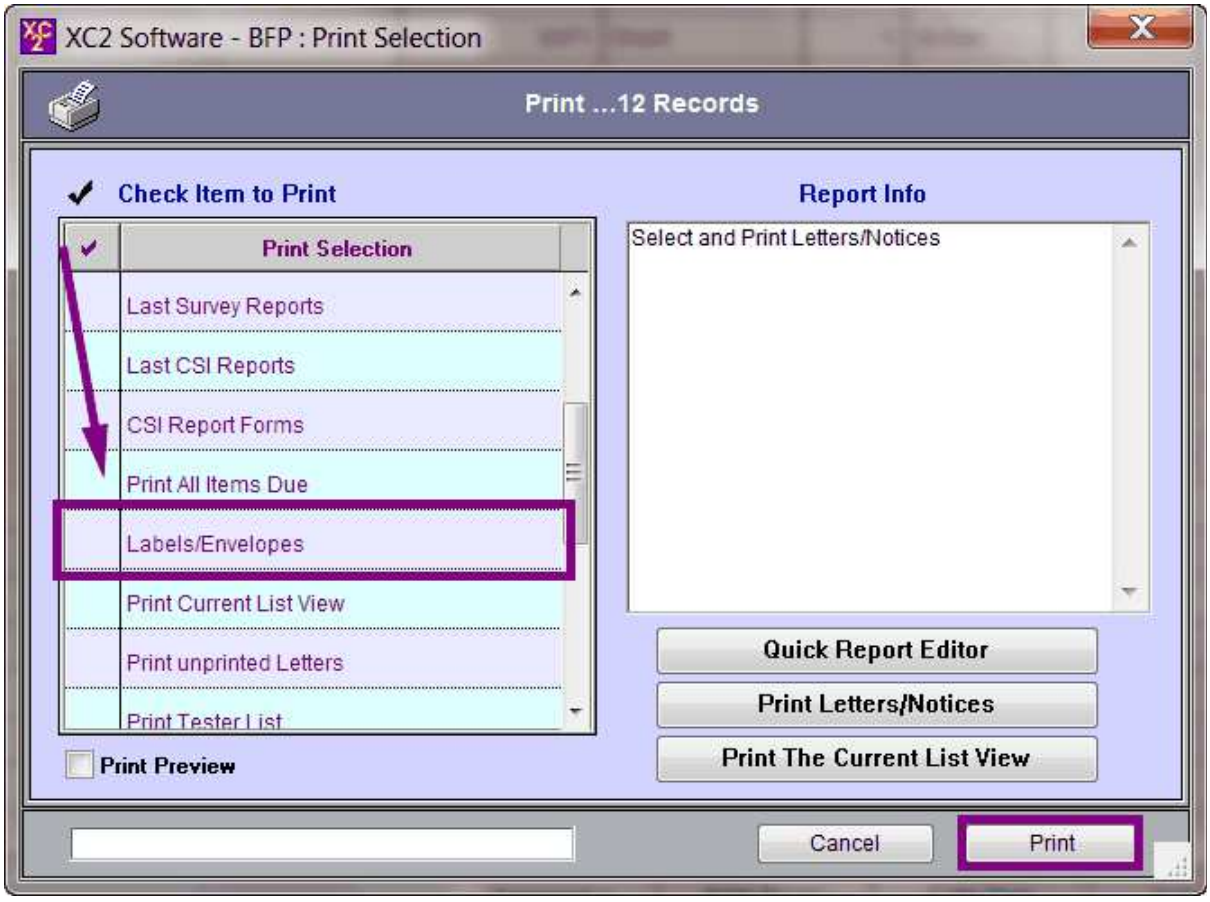
- Apply to All
- One Only
- Cancel

Notes:

Print Selection

In Print Selection Options

- Select Labels/Envelopes
- Click Print

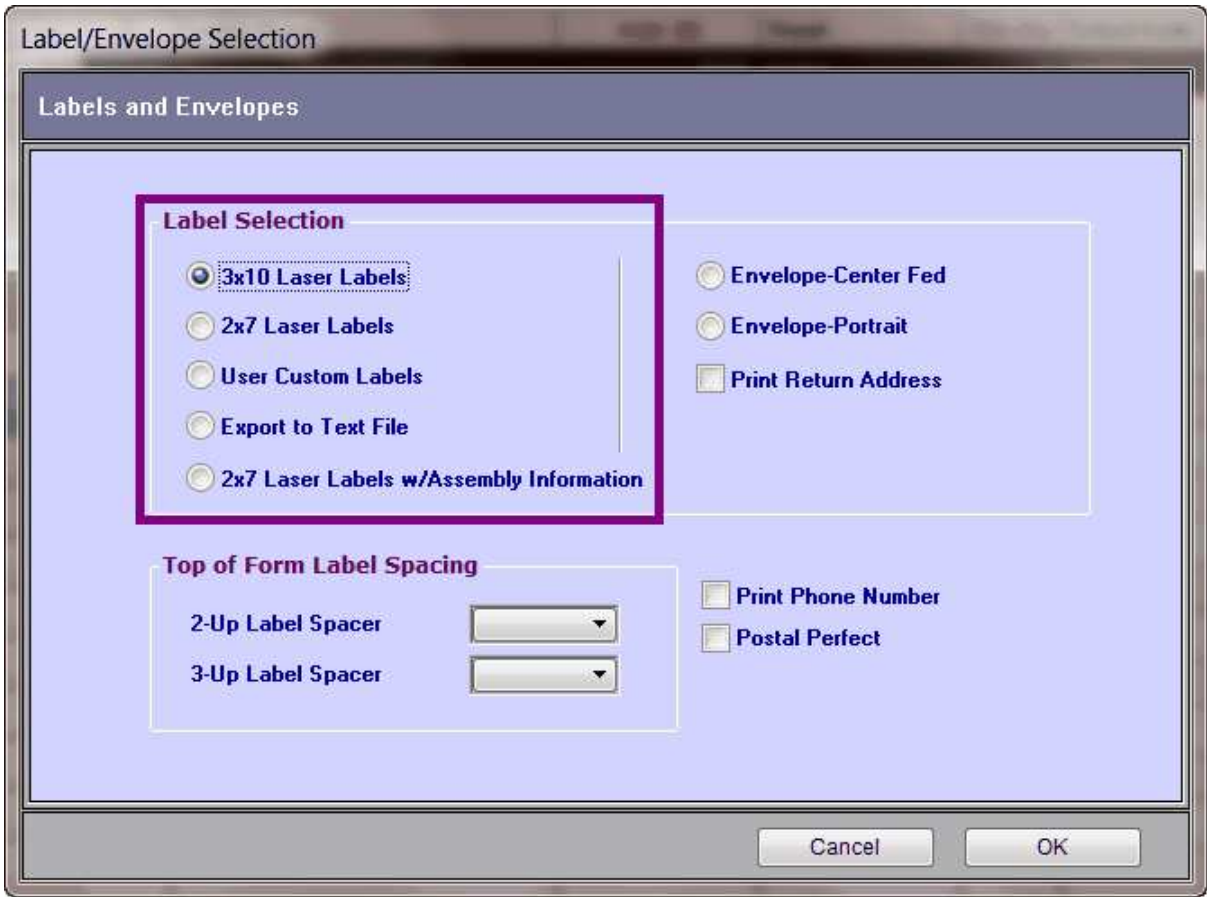


Notes:

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:

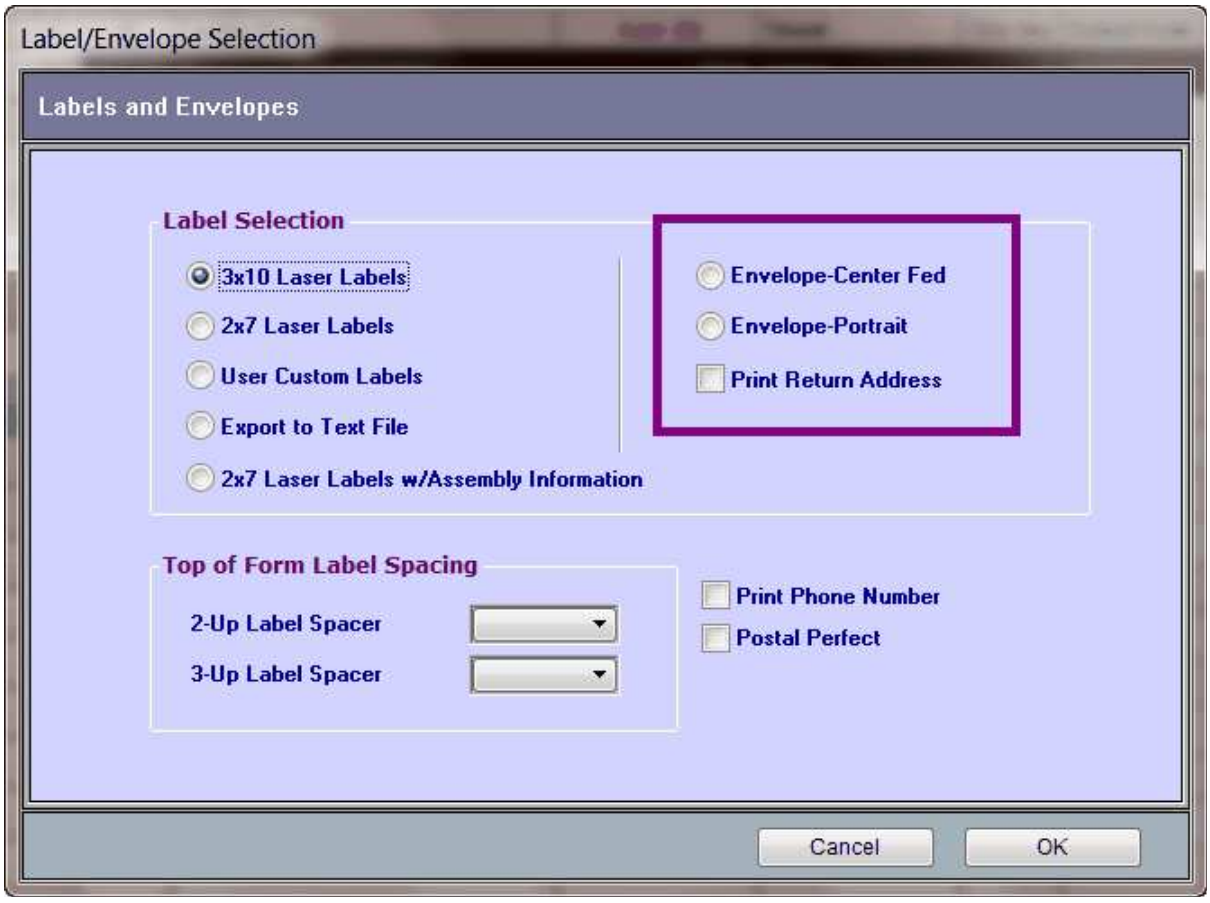
Label Selection: Envelopes

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"

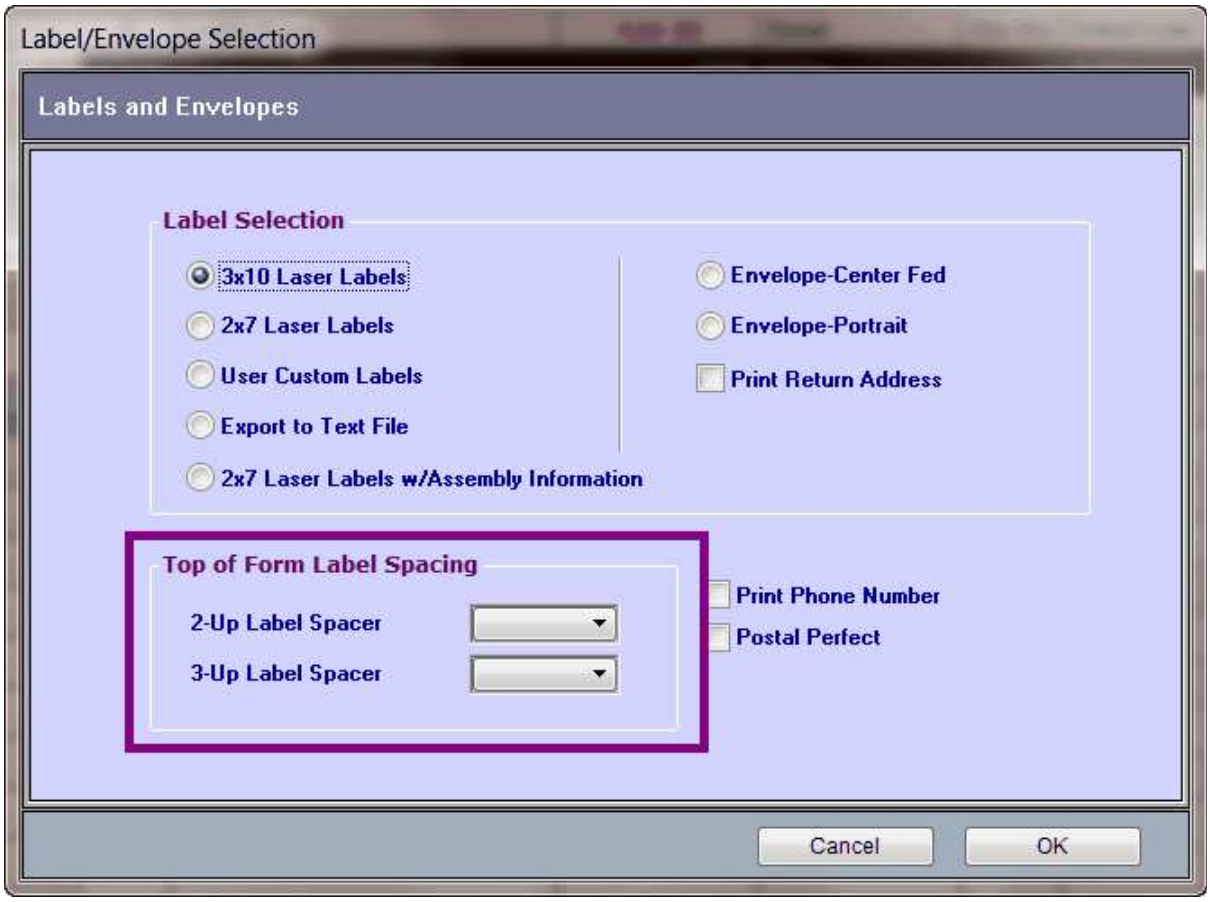
Click the pulldown menu and select the amount of space you need between the top of the page and the first line of the address.

If the labels you are using are placed in two coulmns, use 2-up.

If the labels you are using are placed in three coulmns, use 3-up.

You may also choose to print a phone number on the label.

When you 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 A rcher Ln
Snoqualamish, WA 98215

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
5998 Buena Park Dr

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

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

Ezekiel Bryant
Rains-Flo Packings
5102 E Clark-Shaw Rd
Snoqualamish, WA 98215

Jeramy 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

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 & A ssociates Real Estate
7323 S Fairway Rd
Snoqualamish, WA 98215

Eduardo Griffin
New Again Auto Re-Con Systems
881 S Fawn Meadow CT
Snoqualamish, WA 98215

Arnold Richardson
National Certification Board
Perioperativ
4604 W Moliana CT
Snoqualamish, WA 98215

Horace Zagnutz Hernandez
A&I Rims
5750 N Colleton Dr
Snoqualamish, WA 98215

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

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 Hillver A ve
Snoqualamish, WA 98215

Eugene Ward
Polymedica Industries Inc
2672 N Hornsea 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

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			
Acct Number		Meter #		Test Report Due:	
Service Address				Schedule Code	
				Assembly Info	(Replacement/Correction)
Equip Location				SN	
Location ID		Protection Type		Mfr	
Contact Name		Ph		Type	
Map Page		#2		Size	
				Model	
				Install Date	
				Permit Num	
☐ Confinement	☐ Freeze Protection	Hazard Type		Haz. Level	

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	#1	#2
Initial Test	☐ Held at ____ PSID	☐ Held at ____ PSID	☐ Opened at ____ PSID	☐ Air Inlet Opened at ____ PSID			
	☐ Closed Tight	☐ Closed Tight		Opened Fully Y ☐ N ☐	☐ Closed Tight	☐	☐
Pass	☐ Leaked	☐ Leaked	☐ Did Not Open	☐ Check Held at ____ PSID	☐ Leaked	☐	☐
Fail				☐ Leaked			
REPAIR	☐ CLEANED REPLACED	☐ CLEANED REPLACED	☐ CLEANED REPLACED	☐ CLEANED REPLACED	CLEANED REPLACED	☐	☐
	☐ Disc	☐ Disc	☐ Disc	☐ Air Inlet Disc	☐ REPAIR	☐	☐
	☐ Spring	☐ Spring	☐ Spring	☐ Airl Inlet Spring			
	☐ Guide	☐ Guide	☐ Diaphragm	☐ Check Disc			
	☐ Seat	☐ Seat	☐ Seat	☐ Check Spring			
	☐ O-Ring(s)	☐ O-Ring(s)	☐ O-Ring(s)	☐ Float			
	☐ Module	☐ Module	☐ Module	☐ Diaphragm			
	☐ Rubber Kit	☐ Rubber Kit	☐ Rubber Kit	☐ Rubber Kit			
	☐	☐	☐	☐	Other	☐	☐
	Other/Notes:						
Final Test	____ PSID	____ PSID	☐ Opened at	Opened Fully Y ☐ N ☐			
	☐ Closed Tight	☐ Closed Tight	____ PSID	Air Inlet ____ PSID	☐ Closed Tight	☐	☐
				CK Valve ____ PSID	Pass ☐		

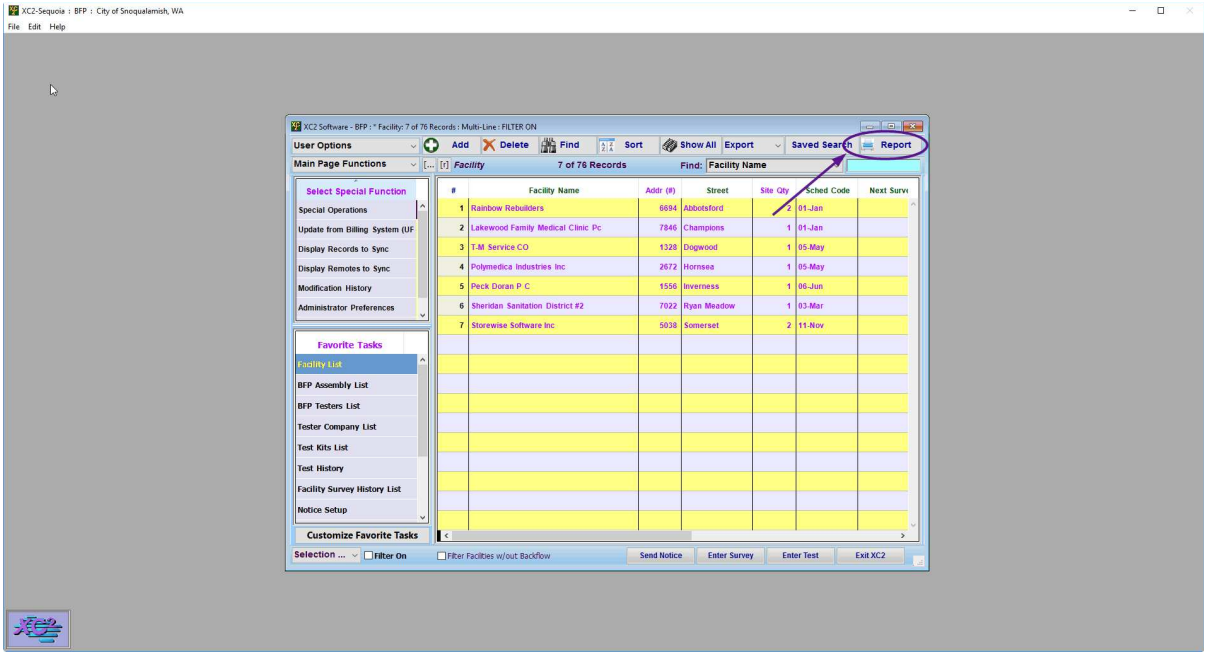
THE ABOVE REPORT IS CERTIFIED TO BE TRUE: 1A

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



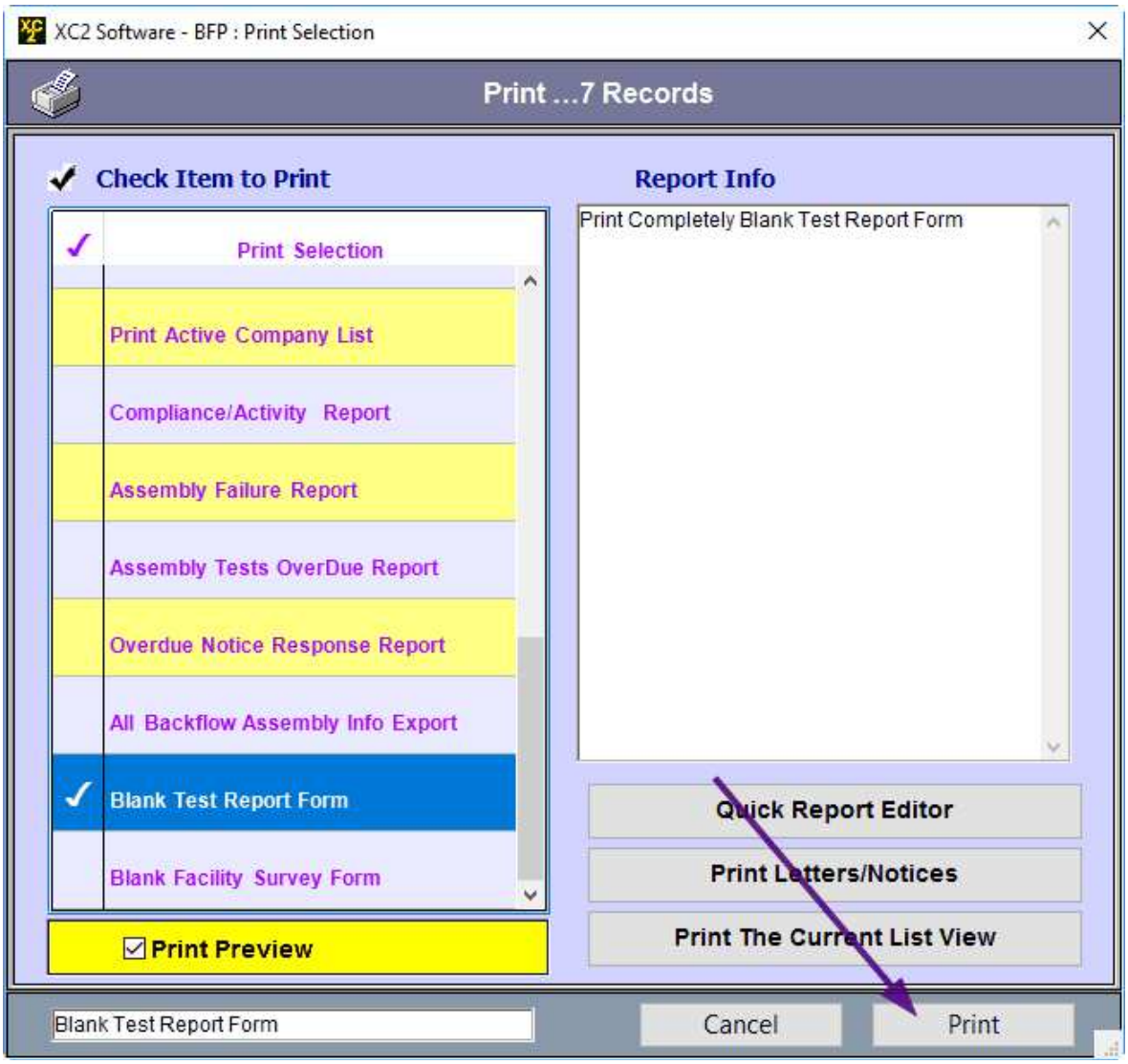
Notes:

Scroll through list

Scroll through the list until you find,

Blank Test Report Form

Click Print

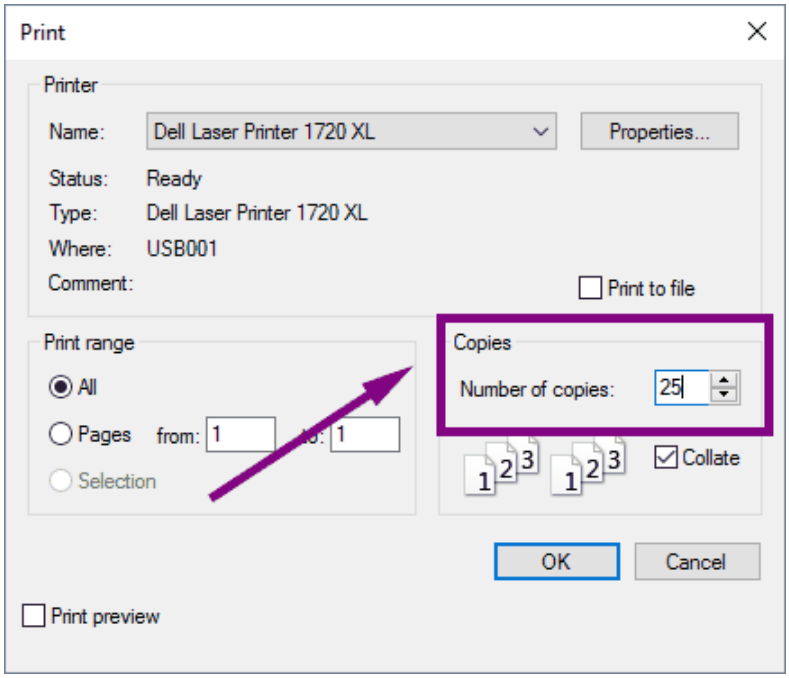


Notes:

Select Number of Copies

Before printing, choose the number of copies you would like to print.

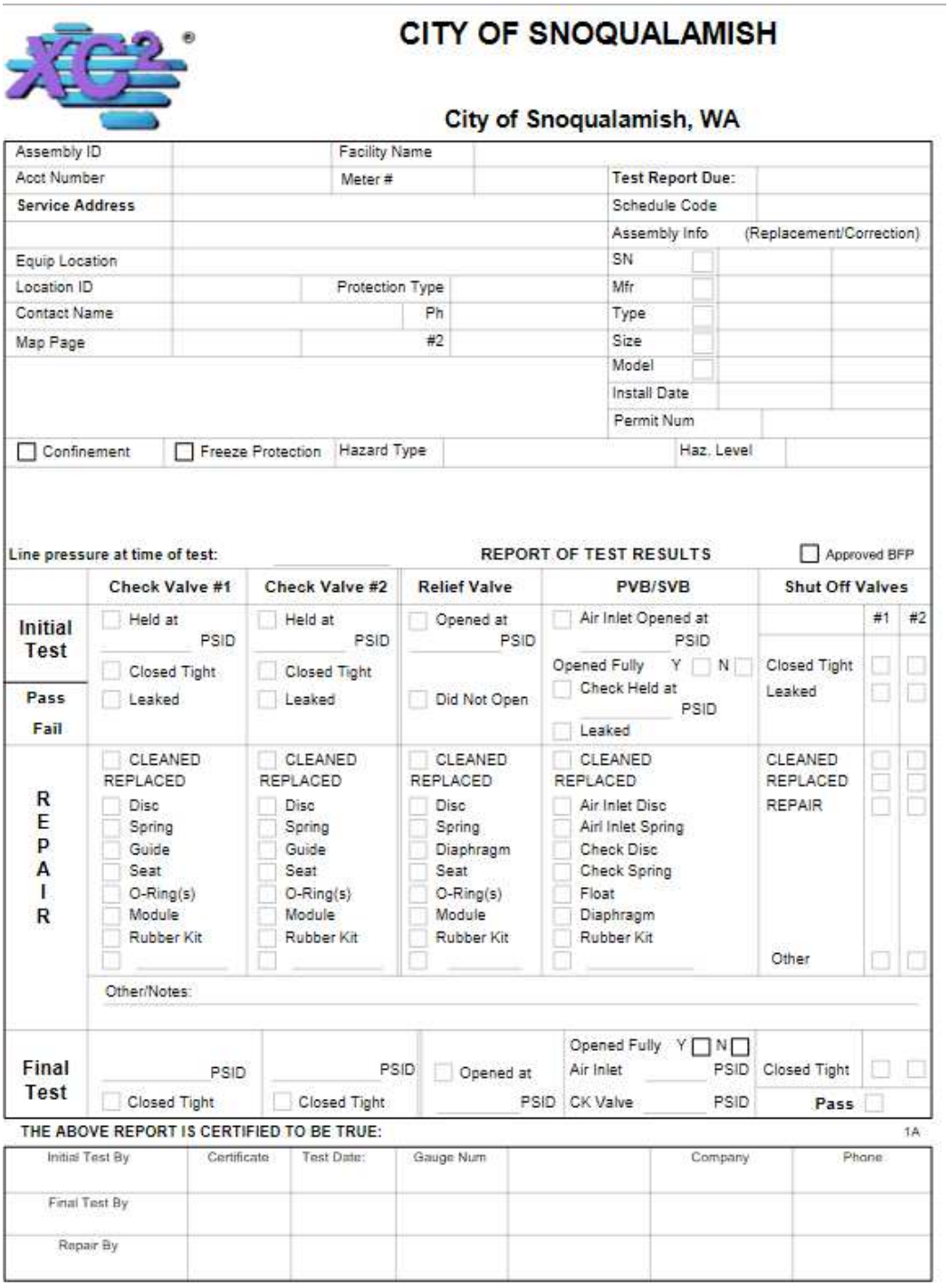
Confirm and Print



Notes:

Blank Test Form

The blank test form will print



CITY OF SNOQUALAMISH

City of Snoqualamish, WA

Assembly ID		Facility Name			
Acct Number		Meter #		Test Report Due:	
Service Address				Schedule Code	
				Assembly Info	(Replacement/Correction)
Equip Location				SN ☐	
Location ID		Protection Type		Mfr ☐	
Contact Name		Ph		Type ☐	
Map Page		#2		Size ☐	
				Model ☐	
				Install Date	
				Permit Num	
☐ Confinement	☐ Freeze Protection	Hazard Type		Haz. Level	

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	#1	#2
Initial Test	☐ Held at _____ PSID	☐ Held at _____ PSID	☐ Opened at _____ PSID	☐ Air Inlet Opened at _____ PSID			
	☐ Closed Tight	☐ Closed Tight		Opened Fully Y ☐ N ☐	☐ Closed Tight	☐	☐
Pass	☐ Leaked	☐ Leaked	☐ Did Not Open	☐ Check Held at _____ PSID	☐ Leaked	☐	☐
Fail				☐ Leaked			
REPAIR	☐ CLEANED REPLACED	☐ CLEANED REPLACED	☐ CLEANED REPLACED	☐ CLEANED REPLACED	CLEANED REPLACED	☐	☐
	☐ Disc	☐ Disc	☐ Disc	☐ Air Inlet Disc	REPAIR	☐	☐
	☐ Spring	☐ Spring	☐ Spring	☐ Airl Inlet Spring			
	☐ Guide	☐ Guide	☐ Diaphragm	☐ Check Disc			
	☐ Seat	☐ Seat	☐ Seat	☐ Check Spring			
	☐ O-Ring(s)	☐ O-Ring(s)	☐ O-Ring(s)	☐ Float			
	☐ Module	☐ Module	☐ Module	☐ Diaphragm			
	☐ Rubber Kit	☐ Rubber Kit	☐ Rubber Kit	☐ Rubber Kit			
	☐ _____	☐ _____	☐ _____	☐ _____	Other	☐	☐
	Other/Notes:						
Final Test	_____ PSID	_____ PSID	☐ Opened at _____ PSID	Opened Fully Y ☐ N ☐ Air Inlet _____ PSID CK Valve _____ PSID	☐ Closed Tight Pass ☐	☐	☐
	☐ Closed Tight	☐ Closed Tight					

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

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

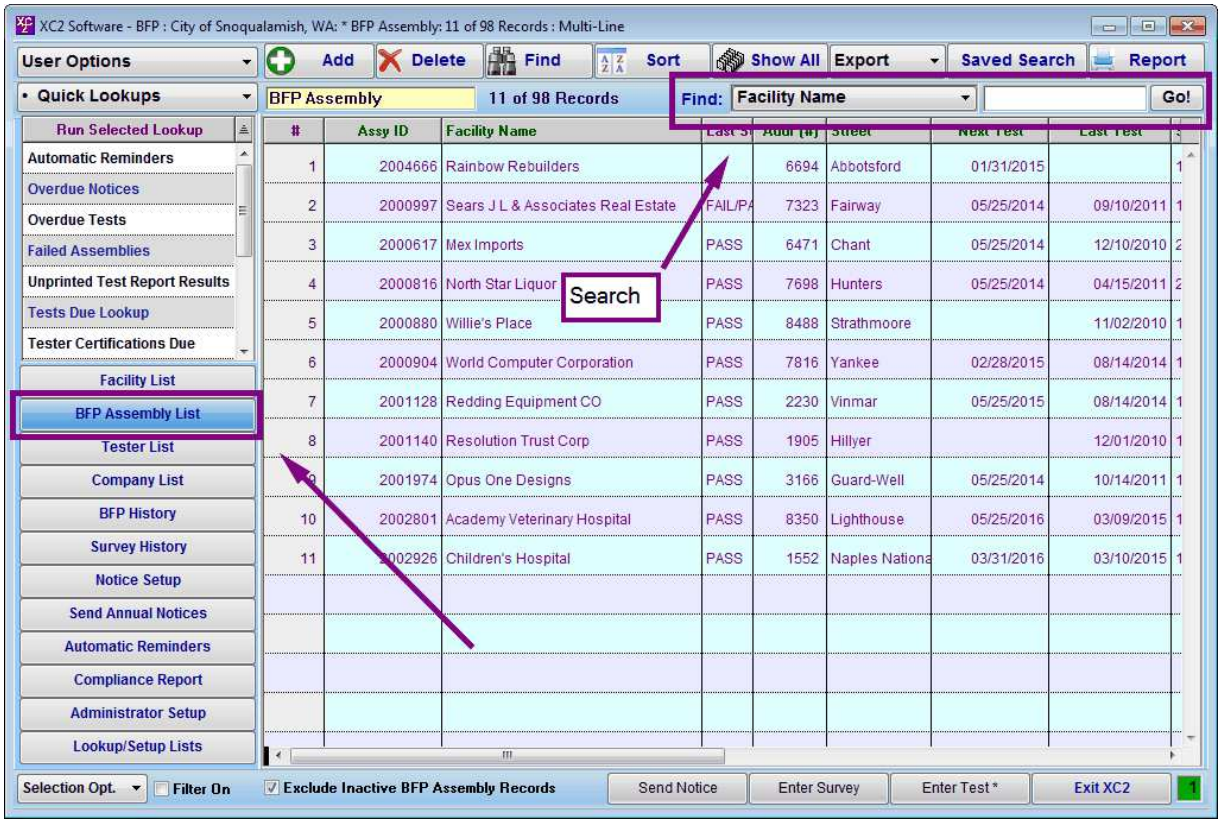
Create a List of Backflow Assemblies

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.



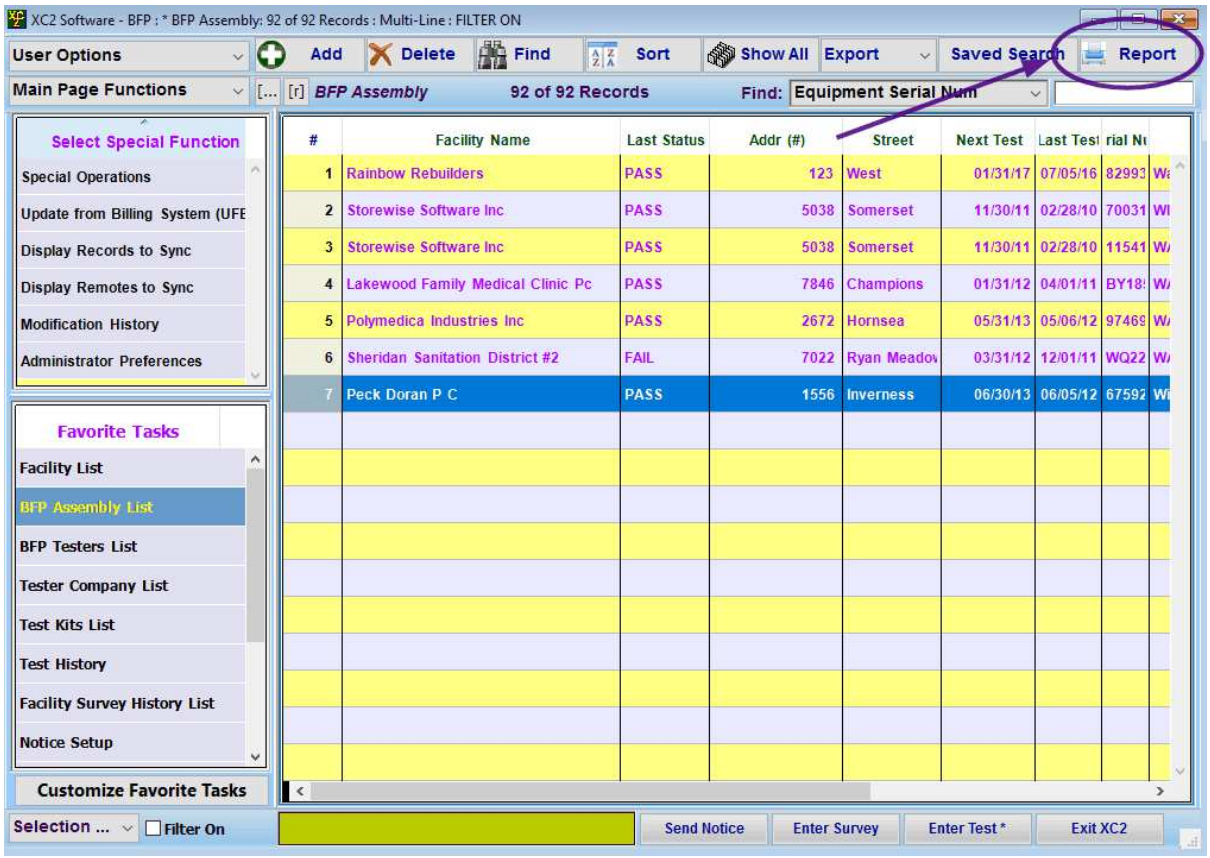
Notes:

Highlight Assemblies

Once you have your list

Highlight the Assemblies that you would like forms printed for, then

Click the Report button



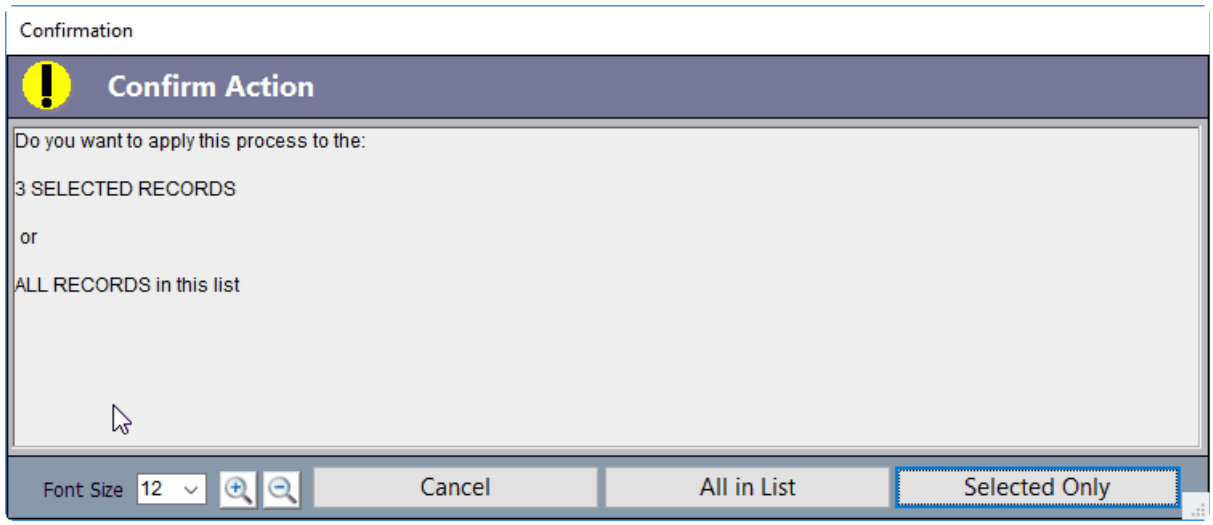
Notes:

Confirmation

You may receive this message:

If you want all to print, Click Apply to All

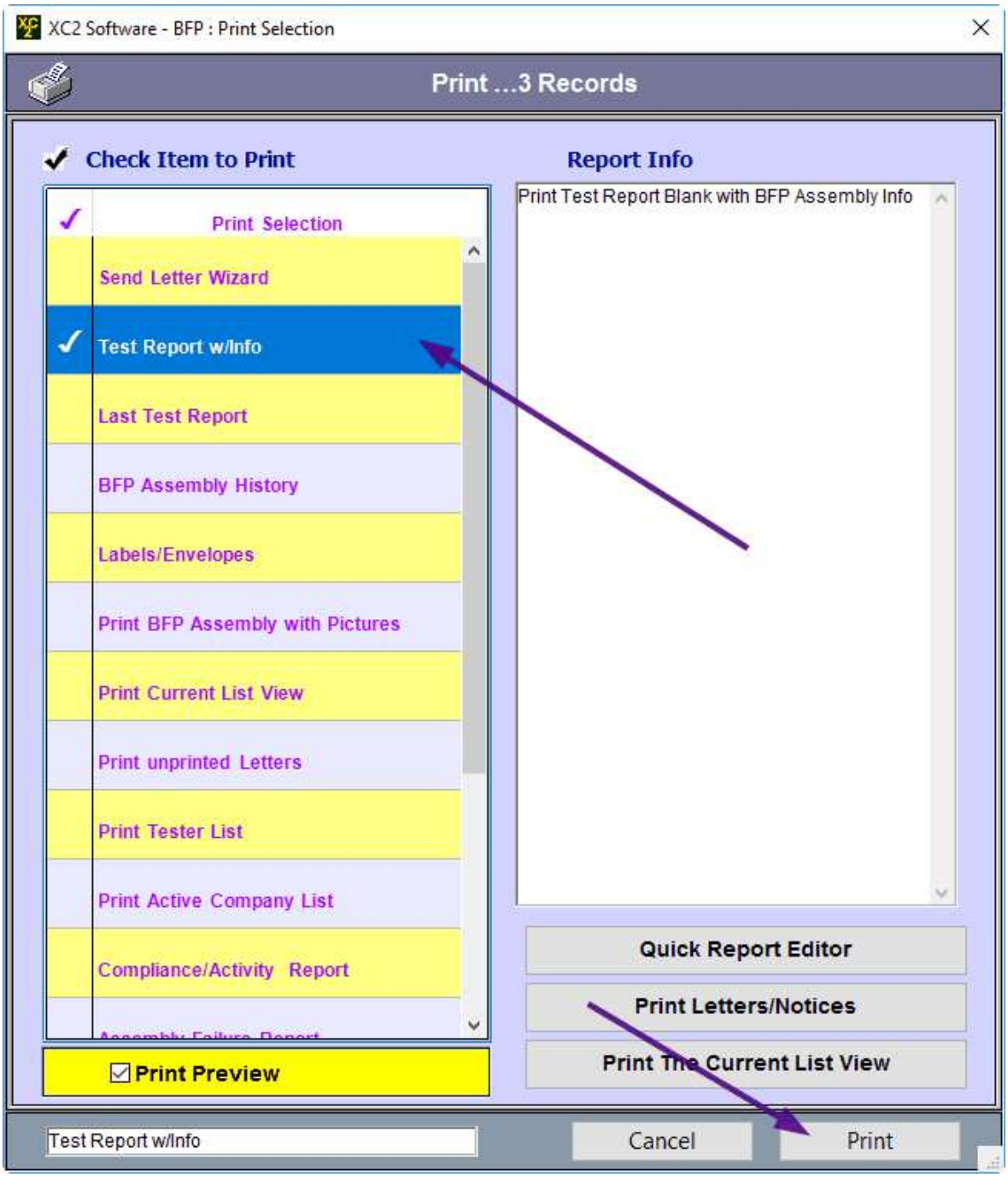
If you only want to print what is selected, click Print Selected or One Only



Notes:

Select Test Report w/Info

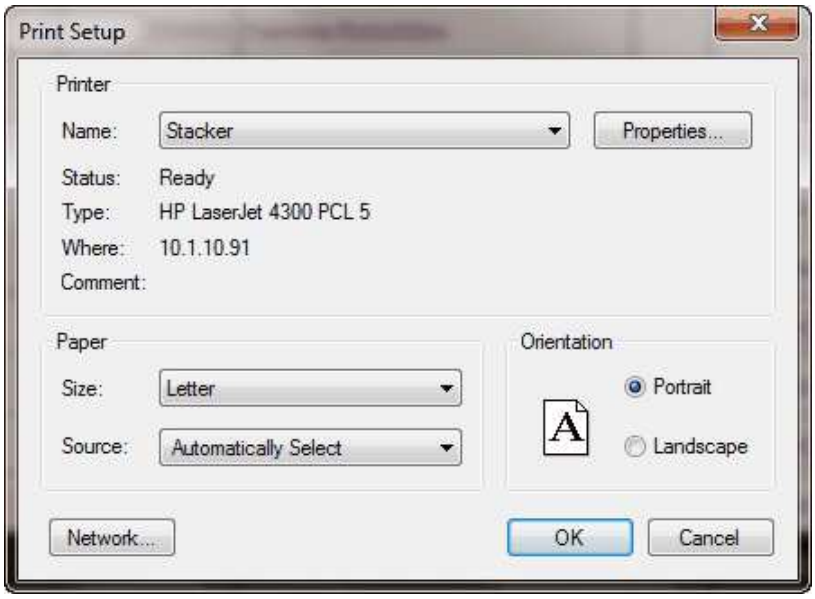
Print



Notes:

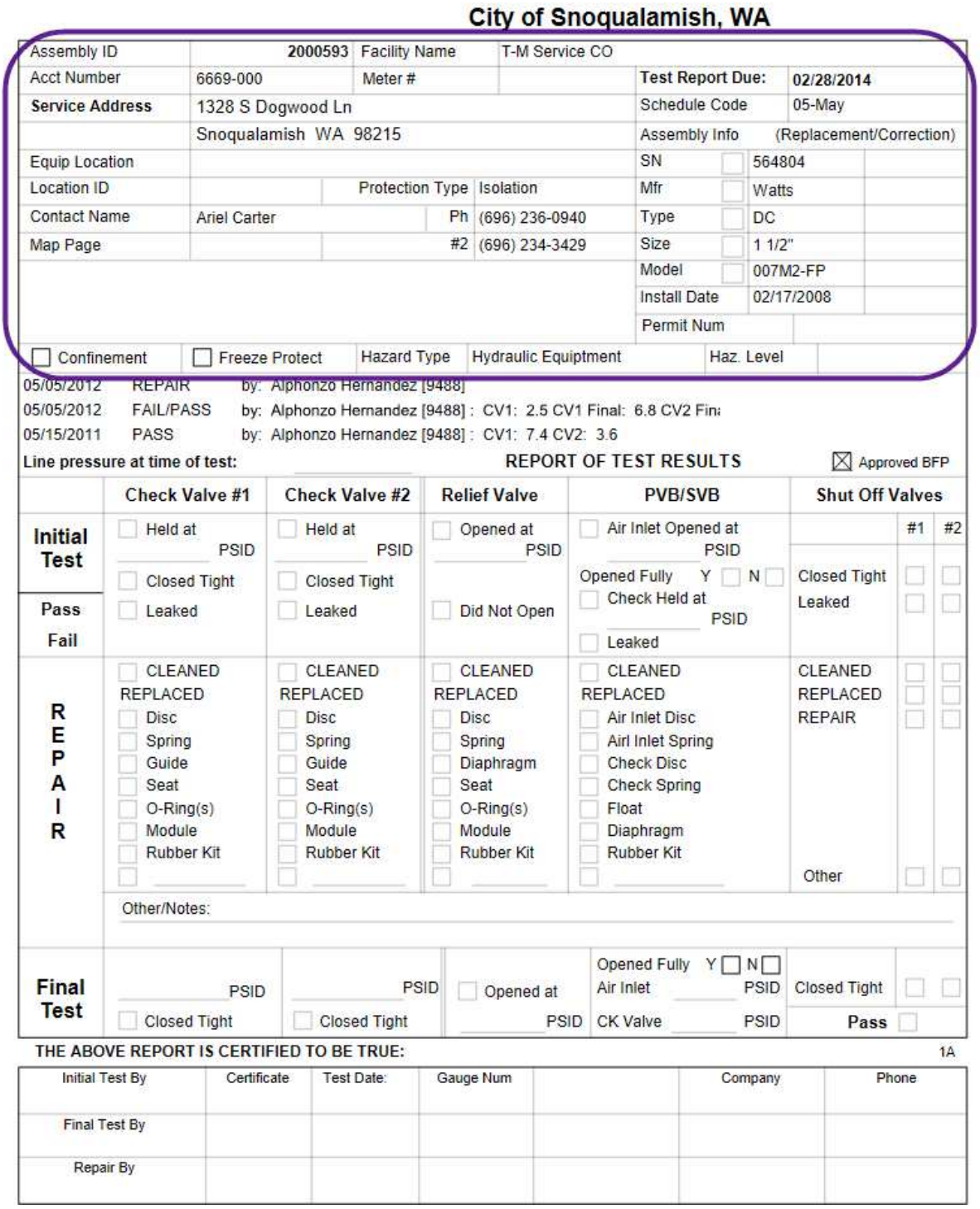
Choose Printer

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 #		Test Report Due:	02/28/2014
Service Address	1328 S Dogwood Ln			Schedule Code	05-May
	Snoqualamish WA 98215			Assembly Info	(Replacement/Correction)
Equip Location				SN	564804
Location ID		Protection Type	Isolation	Mfr	Watts
Contact Name	Ariel Carter	Ph	(696) 236-0940	Type	DC
Map Page		#2	(696) 234-3429	Size	1 1/2"
				Model	007M2-FP
				Install Date	02/17/2008
				Permit Num	

☐ Confinement ☐ Freeze Protect | Hazard Type | Hydraulic Equiptment | 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	#1	#2
Initial Test	☐ Held at ____ PSID	☐ Held at ____ PSID	☐ Opened at ____ PSID	☐ Air Inlet Opened at ____ PSID			
	☐ Closed Tight	☐ Closed Tight		Opened Fully Y ☐ N ☐	☐ Closed Tight	☐	☐
Pass	☐ Leaked	☐ Leaked	☐ Did Not Open	☐ Check Held at ____ PSID	☐ Leaked	☐	☐
Fail				☐ Leaked			
REPAIR	☐ CLEANED	☐ CLEANED	☐ CLEANED	☐ CLEANED	CLEANED	☐	☐
	REPLACED	REPLACED	REPLACED	REPLACED	REPLACED	☐	☐
	☐ Disc	☐ Disc	☐ Disc	☐ Air Inlet Disc	☐ REPAIR	☐	☐
	☐ Spring	☐ Spring	☐ Spring	☐ Airl Inlet Spring			
	☐ Guide	☐ Guide	☐ Diaphragm	☐ Check Disc			
	☐ Seat	☐ Seat	☐ Seat	☐ Check Spring			
	☐ O-Ring(s)	☐ O-Ring(s)	☐ O-Ring(s)	☐ Float			
	☐ Module	☐ Module	☐ Module	☐ Diaphragm			
	☐ Rubber Kit	☐ Rubber Kit	☐ Rubber Kit	☐ Rubber Kit			
	☐ ____	☐ ____	☐ ____	☐ ____	Other	☐	☐
	Other/Notes:						
Final Test	____ PSID	____ PSID	☐ Opened at ____ PSID	Opened Fully Y ☐ N ☐ Air Inlet ____ PSID	Closed Tight	☐	☐
	☐ Closed Tight	☐ Closed Tight		CK Valve ____ PSID	**Pass**	☐	

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

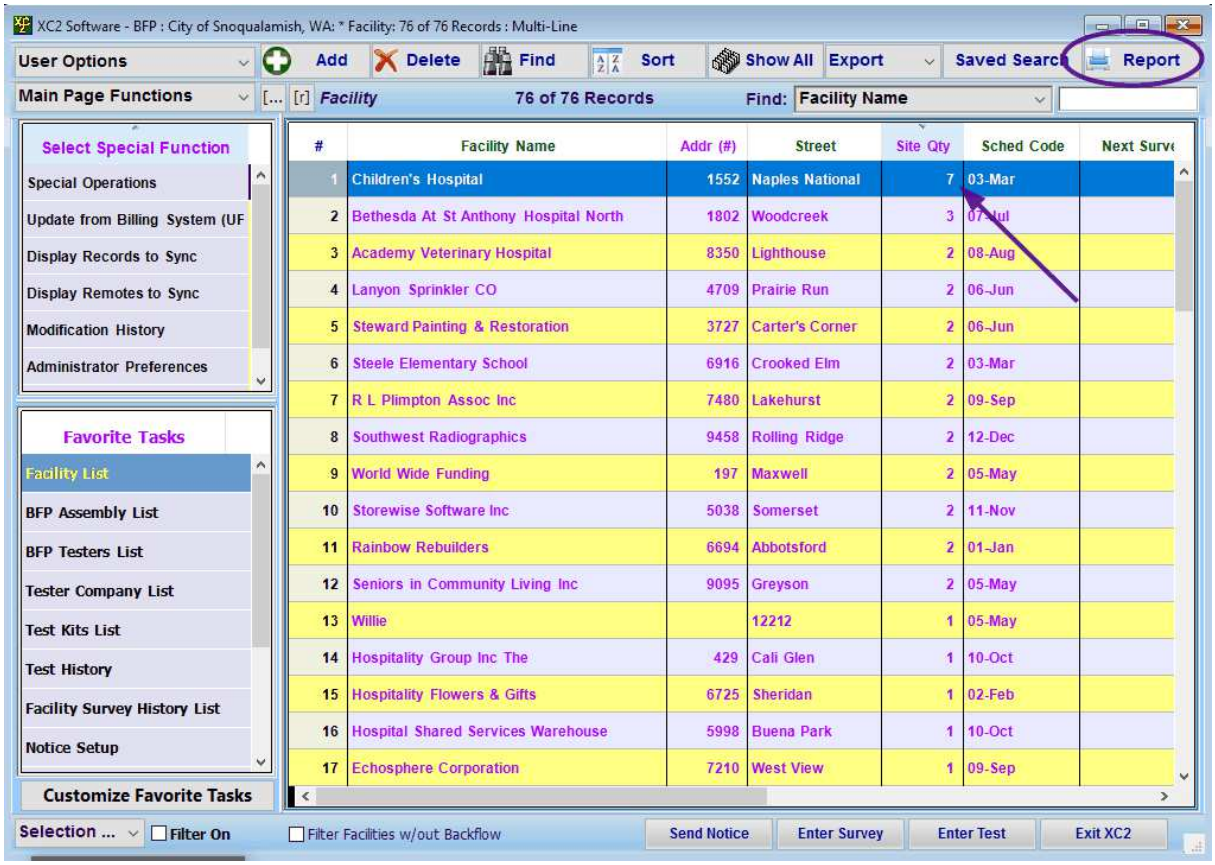
KB Asset ID: 3517

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.

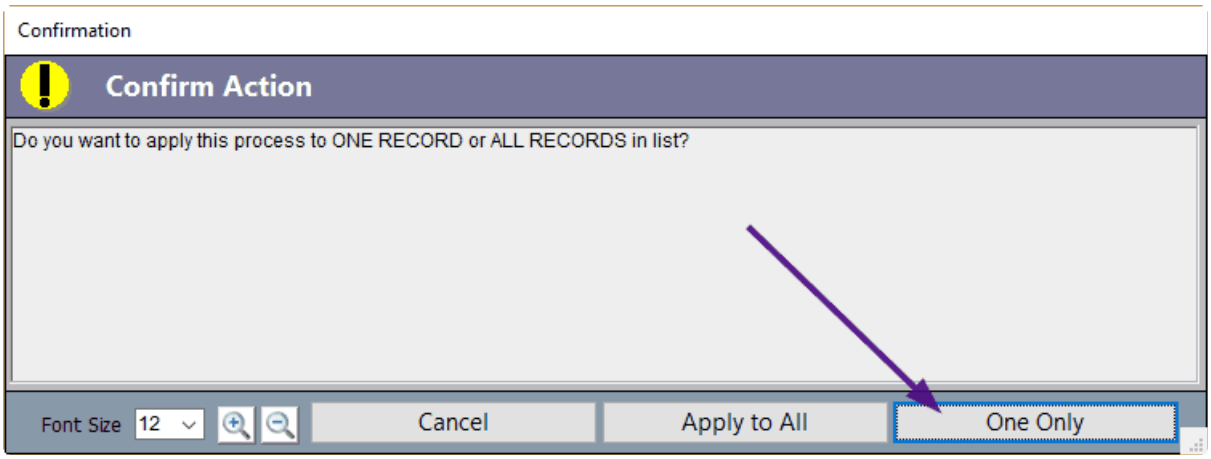
Click Report



Notes:

Confirmation

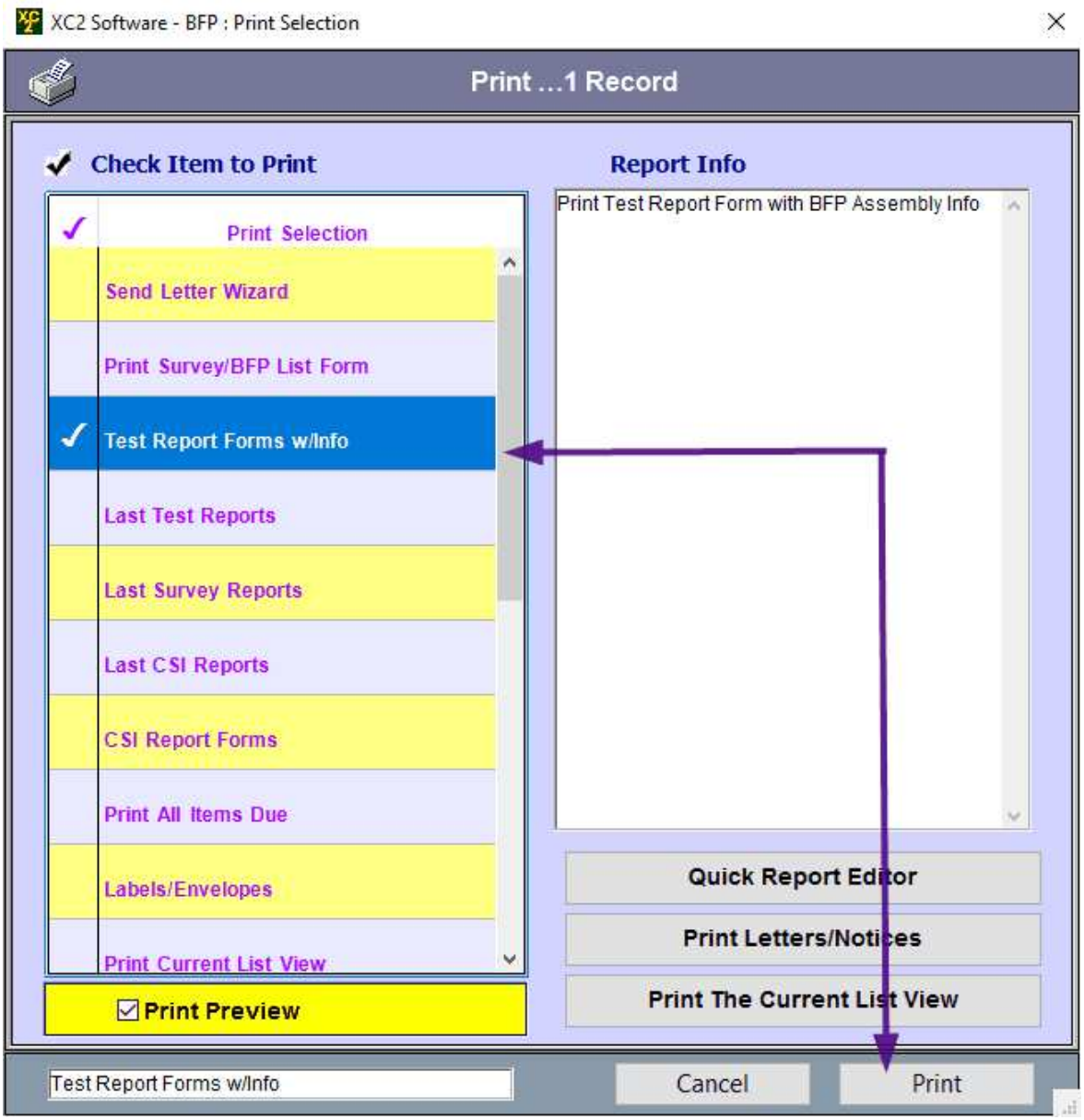
In this case, I am selecting to print my reports from just the one facility record.



Notes:

Select Test Report With Info

Click Print



Notes:

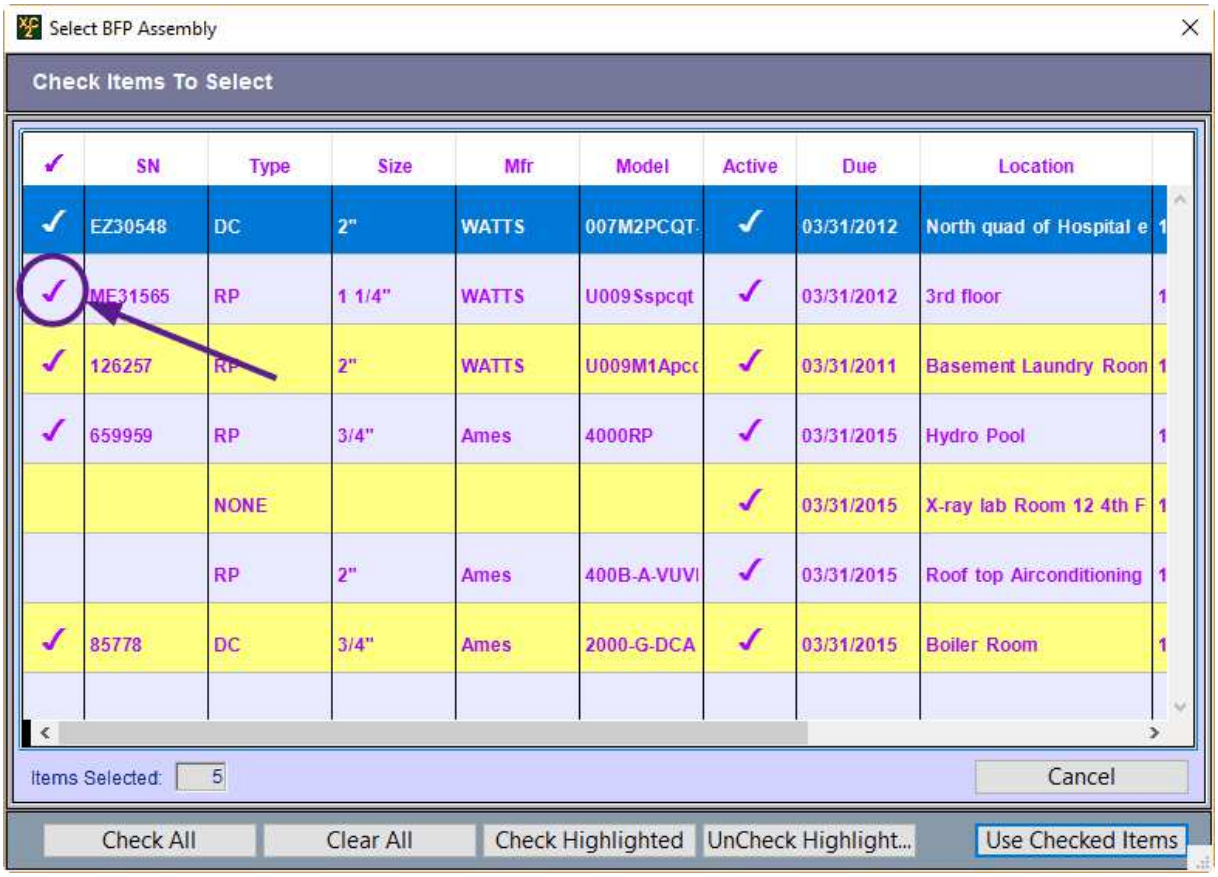
Select the Device

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



Notes:

XC2 Software Knowledge Base

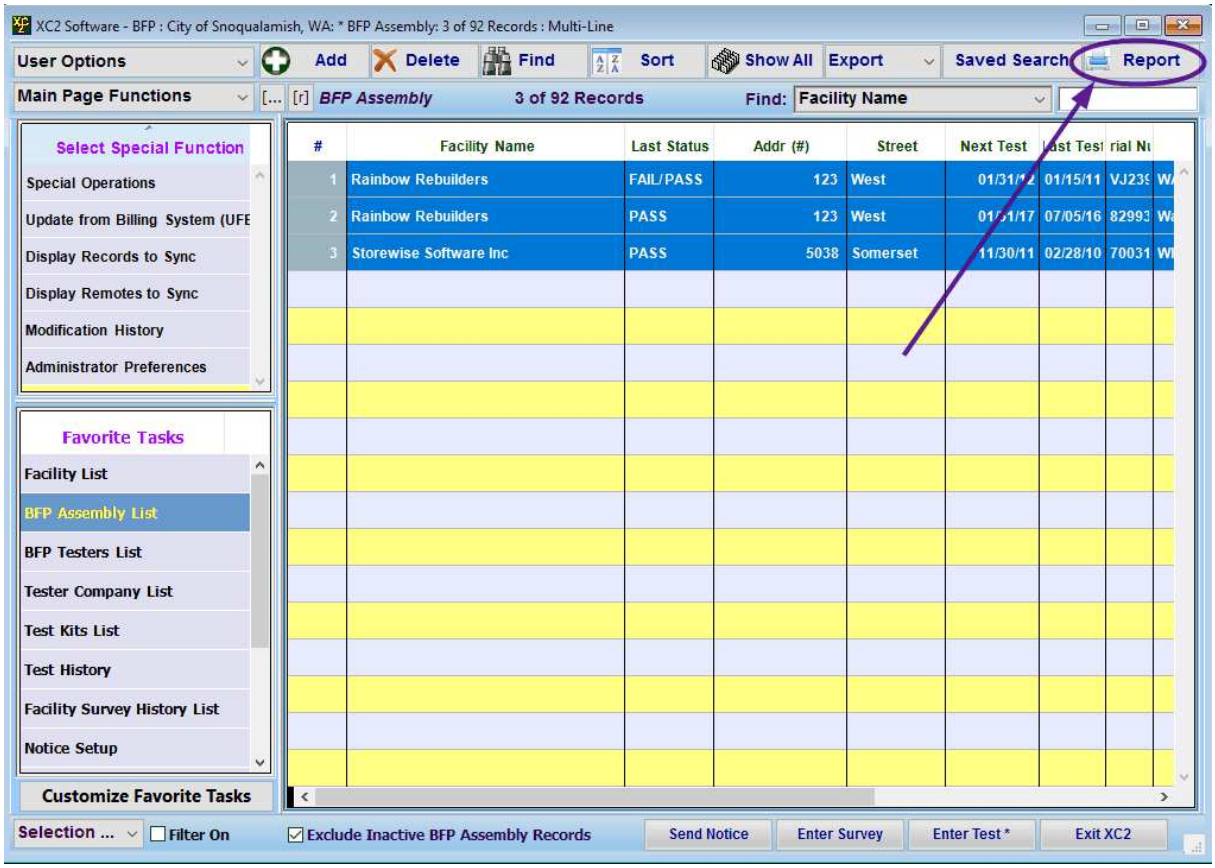
Printing Last Test Report From Assembly List

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

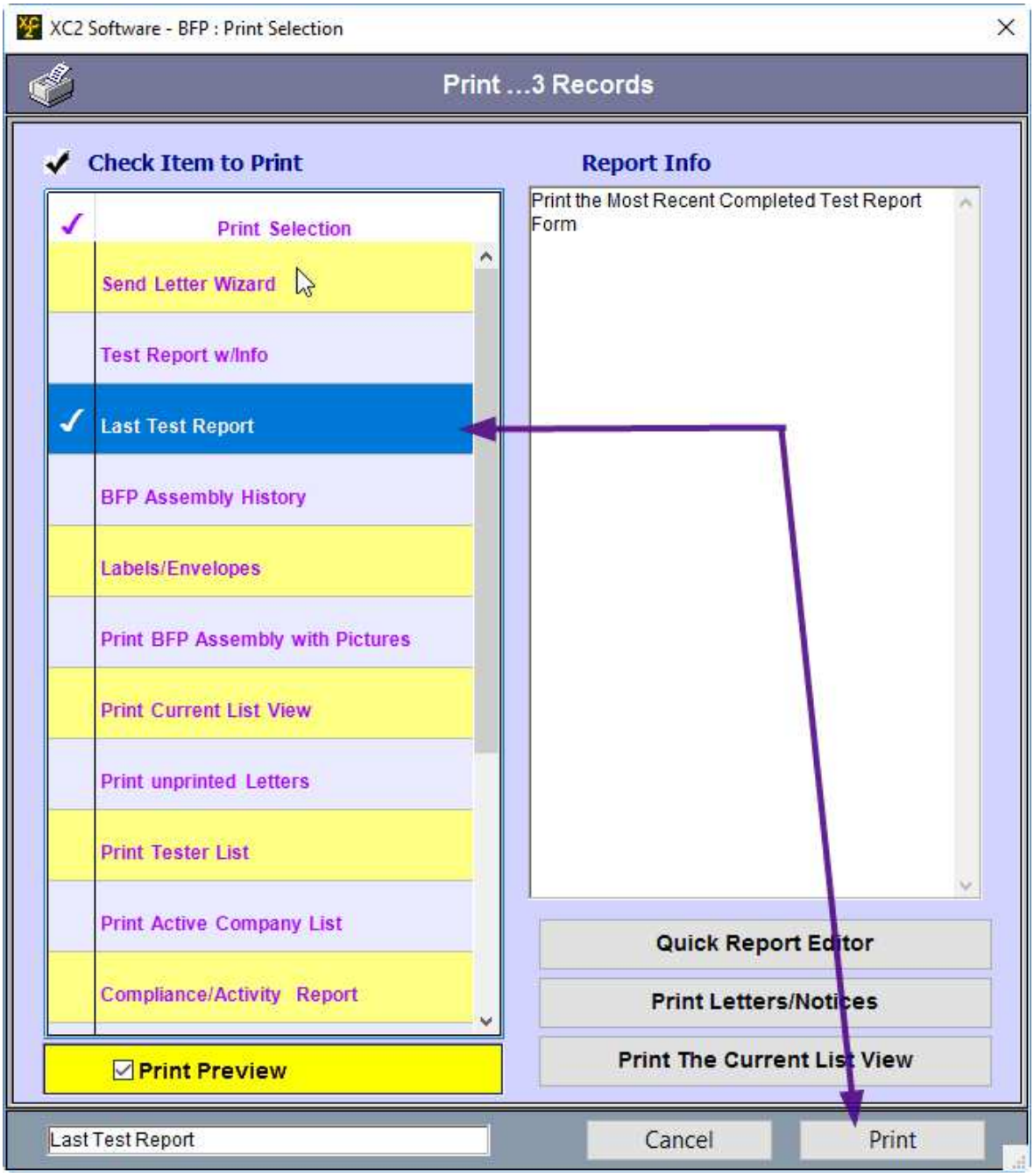
Click Report



Notes:

Click on Last Test Report

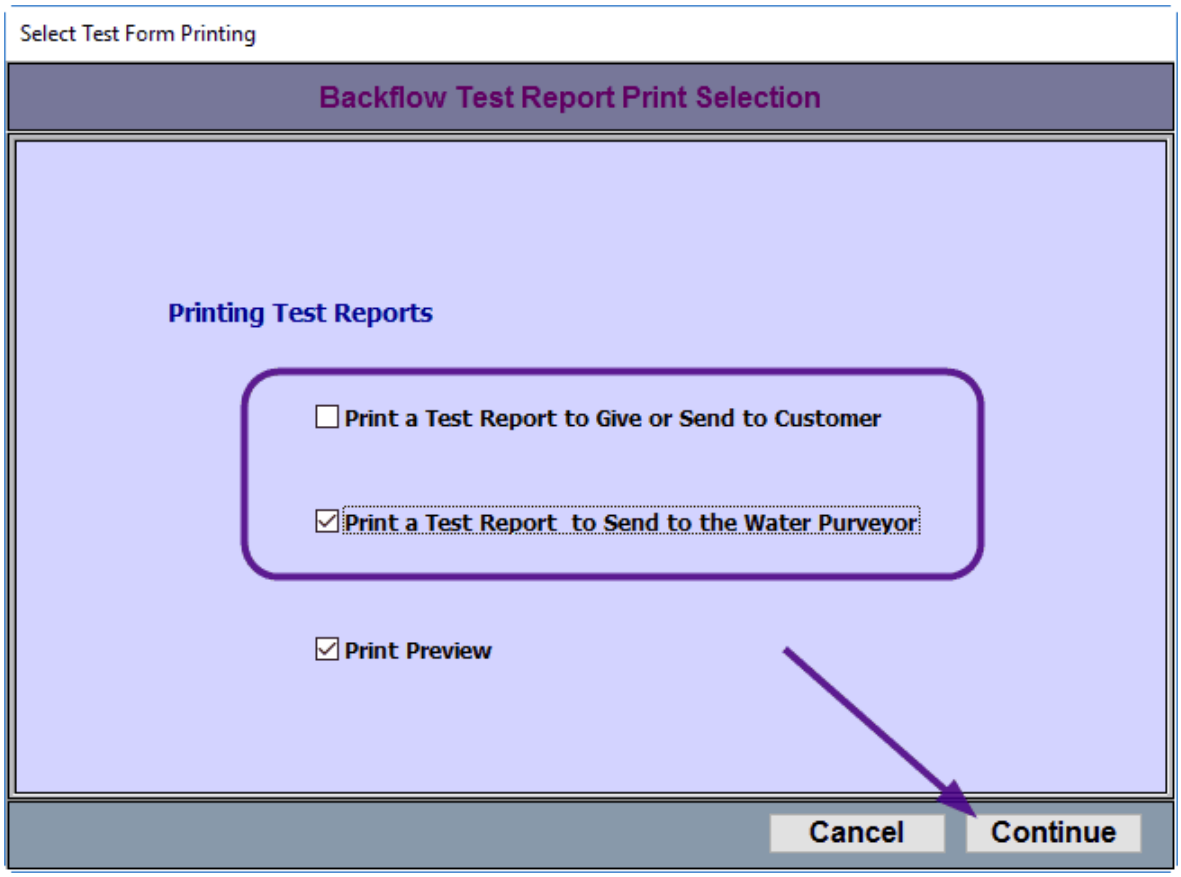
Click Print



Notes:

Select Print Option

You may also select to preview the report before printing

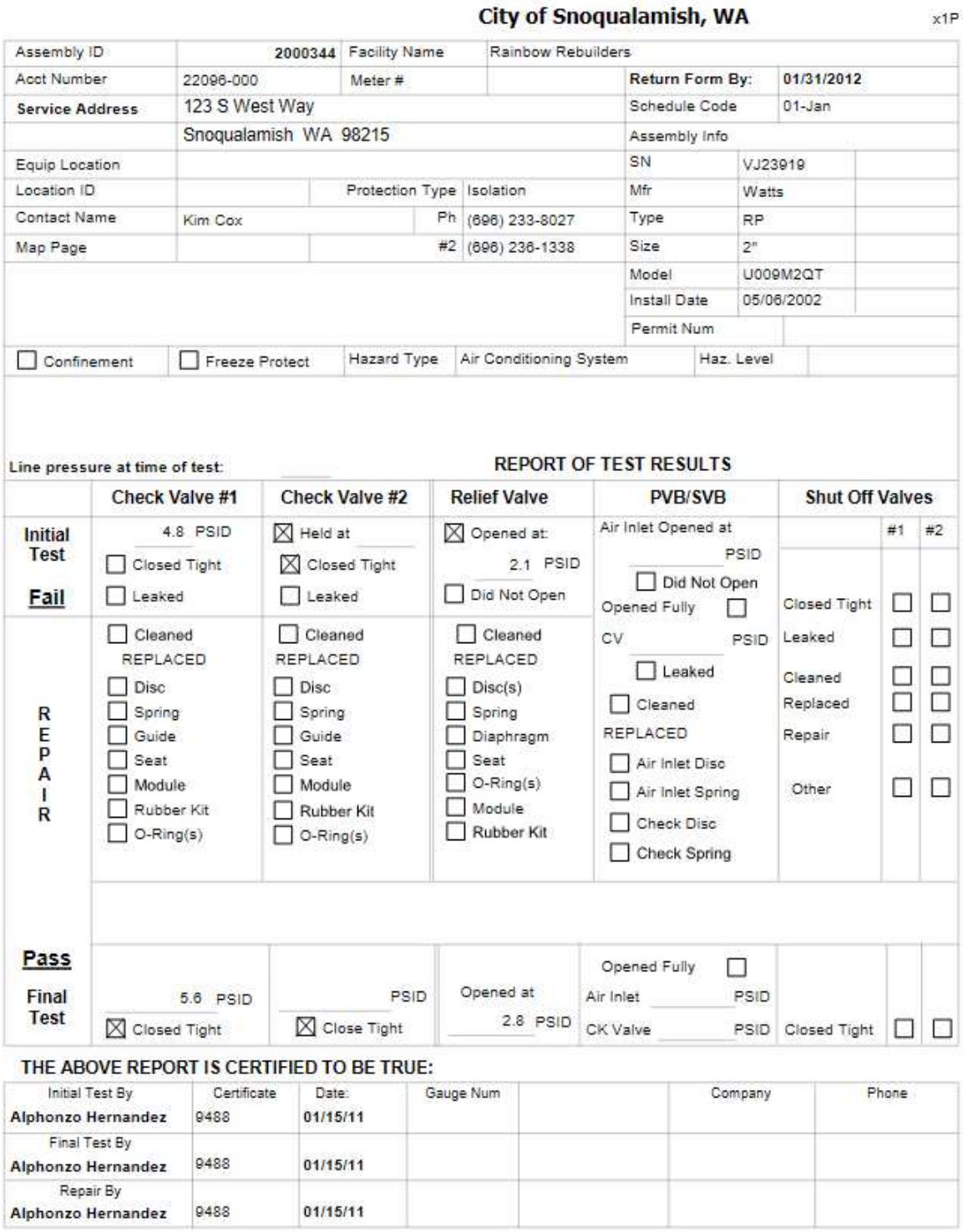


Notes:

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			
Acct 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	(696) 233-8027	Type	RP	
Map Page		#2	(696) 236-1338	Size	2"	
				Model	U009M2QT	
				Install Date	05/06/2002	
				Permit Num		

☐ Confinement ☐ 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	#1	#2
Initial Test	4.8 PSID	☒ Held at	☒ Opened at:	Air Inlet Opened at PSID			
	☐ Closed Tight	☒ Closed Tight	2.1 PSID	☐ Did Not Open			
Fail	☐ Leaked	☐ Leaked	☐ Did Not Open	Opened Fully ☐	Closed Tight	☐	☐
	☐ Cleaned	☐ Cleaned	☐ Cleaned	CV PSID	Leaked	☐	☐
	REPLACED	REPLACED	REPLACED	☐ Leaked	Cleaned	☐	☐
	☐ Disc	☐ Disc	☐ Disc(s)	☐ Cleaned	Replaced	☐	☐
	☐ Spring	☐ Spring	☐ Spring	REPLACED	Repair	☐	☐
REPAIR	☐ Guide	☐ Guide	☐ Diaphragm	☐ Air Inlet Disc			
	☐ Seat	☐ Seat	☐ Seat	☐ Air Inlet Spring	Other	☐	☐
	☐ Module	☐ Module	☐ O-Ring(s)	☐ Check Disc			
	☐ Rubber Kit	☐ Rubber Kit	☐ Module	☐ Check Spring			
	☐ O-Ring(s)	☐ O-Ring(s)	☐ Rubber Kit				
Pass				Opened Fully ☐			
Final Test	5.6 PSID	PSID	Opened at	Air Inlet PSID			
	☒ Closed Tight	☒ Close Tight	2.8 PSID	CK Valve PSID	Closed Tight	☐	☐

THE ABOVE REPORT IS CERTIFIED TO BE TRUE:

	Certificate	Date:	Gauge Num		Company	Phone
Initial Test By **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

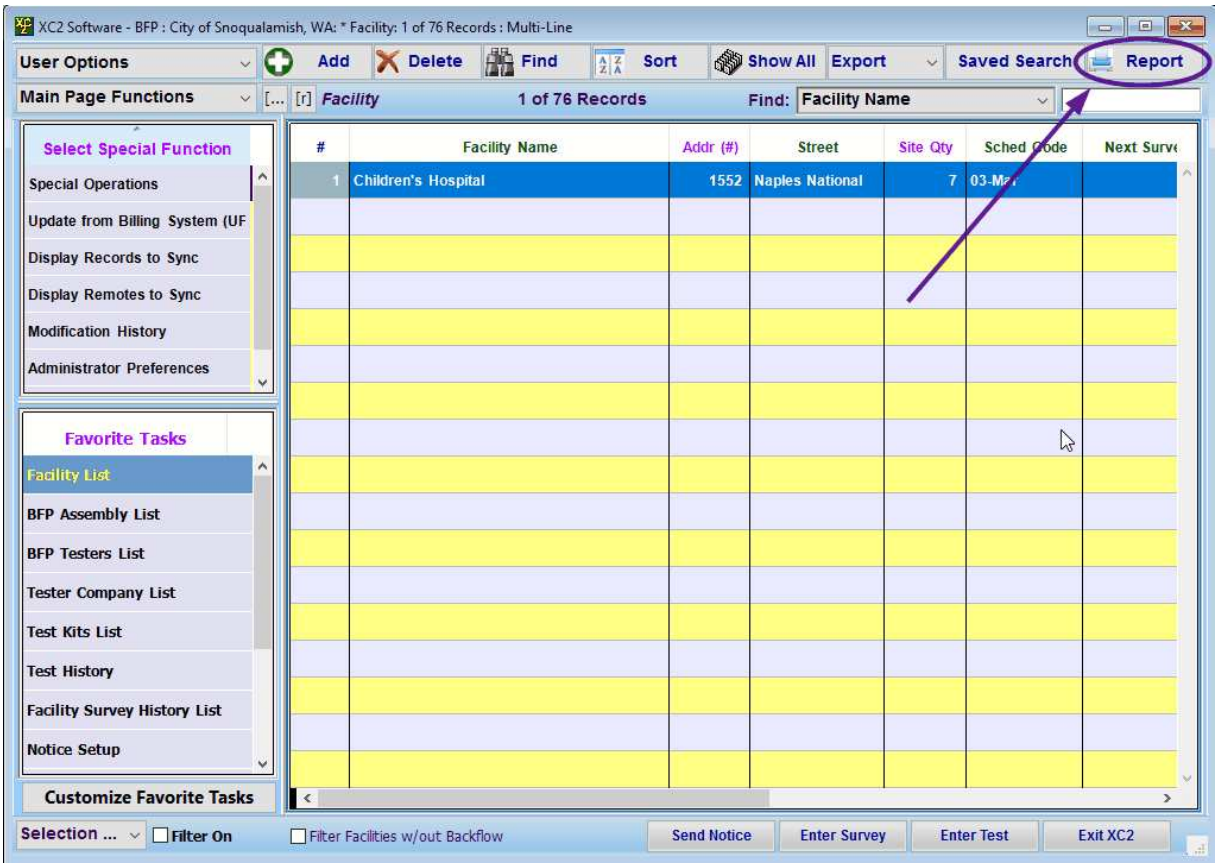
KB Asset ID: 3519

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

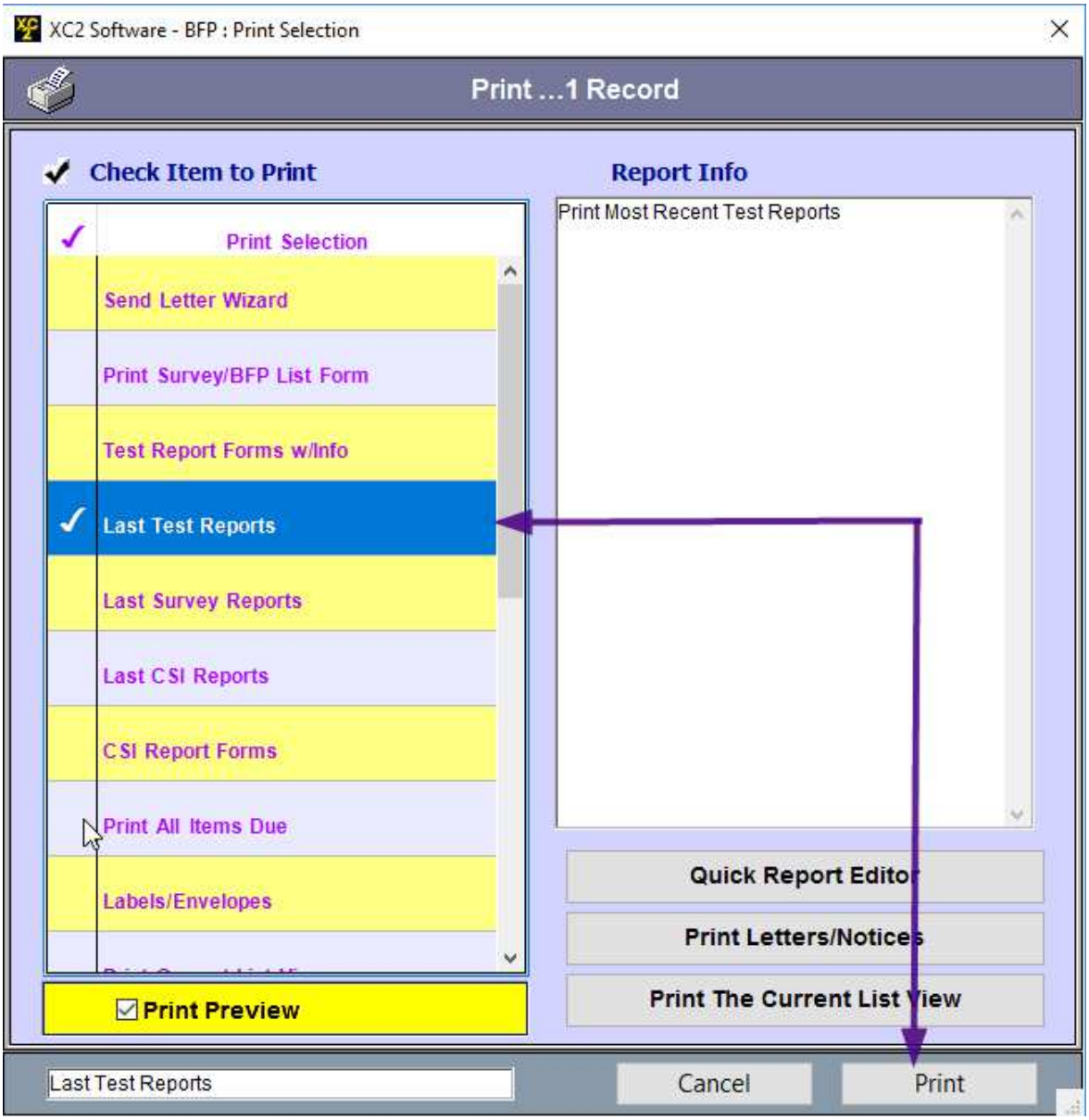
Click Report



Notes:

Select Last Test Report

Click Print



Notes:

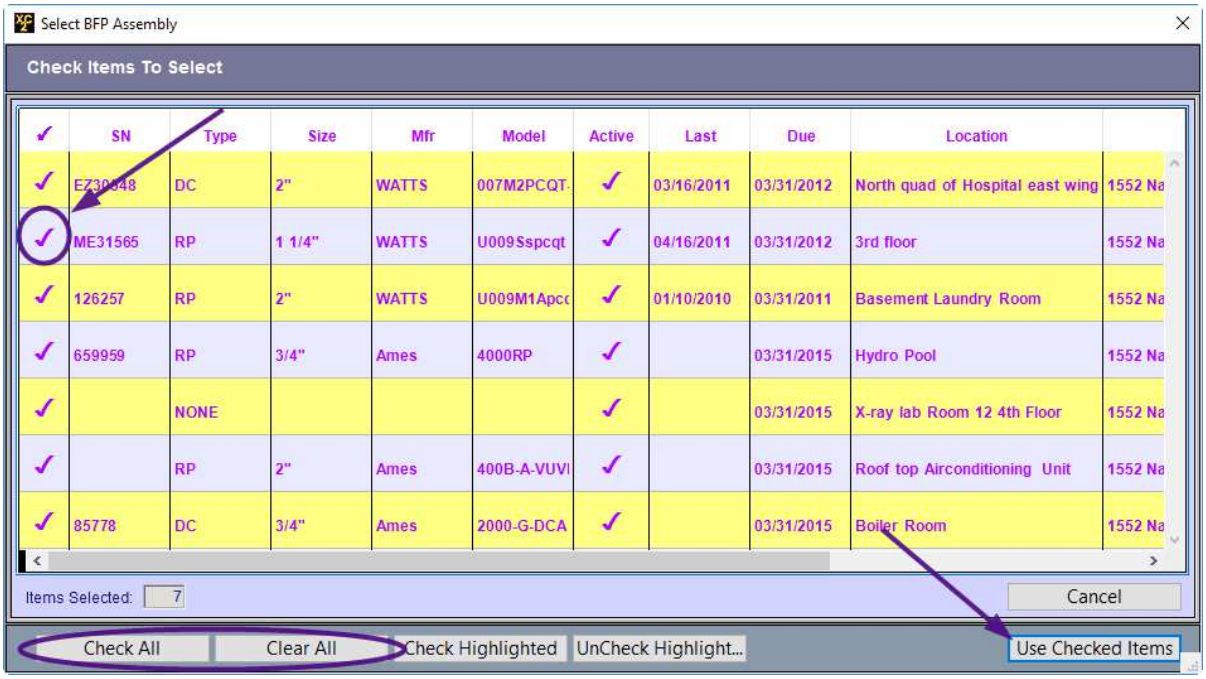
Select records to print

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

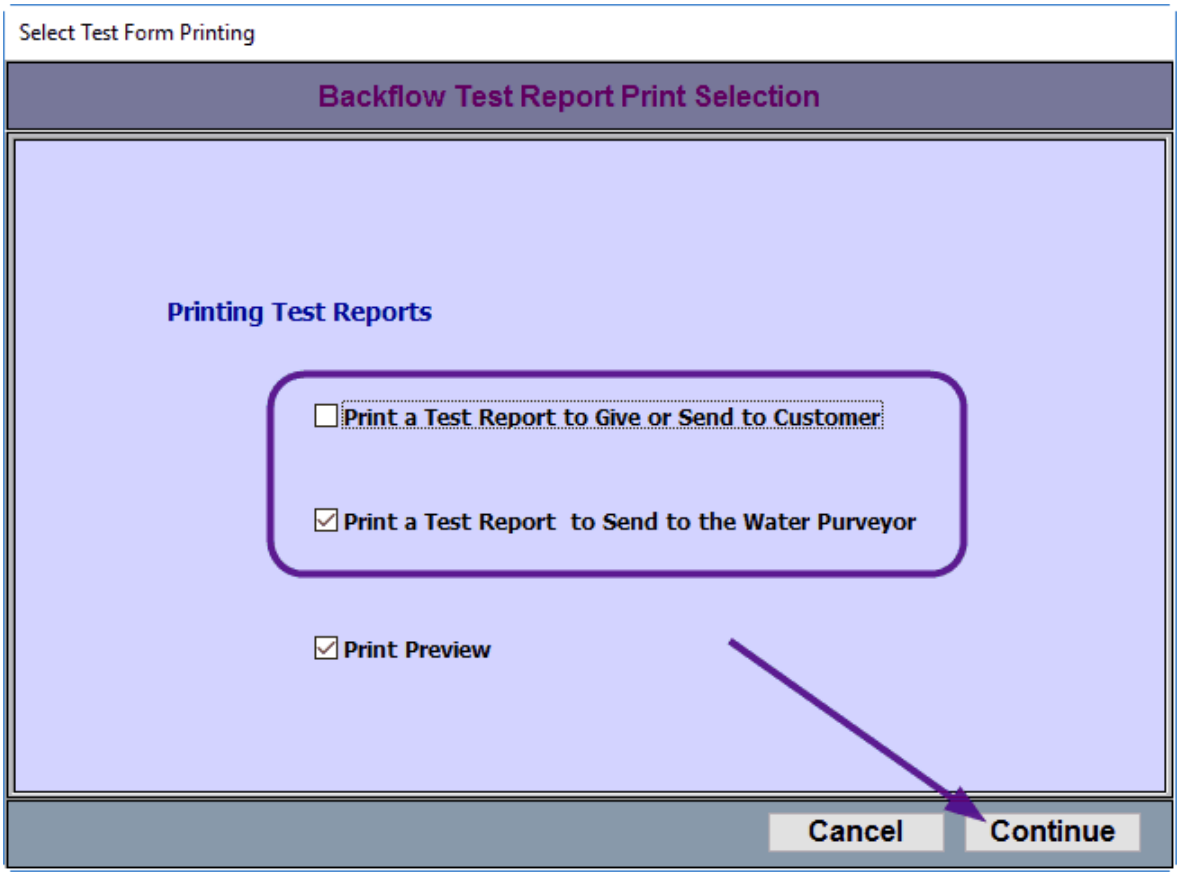


Notes:

Make Your Print Selection

You may also choose to print preview

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
	Snoqualiamish 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	#1	#2
Initial Test **Pass**	6.4 PSID ☒ Closed Tight ☐ Leaked	☒ Held at 3.2 ☒ Closed Tight ☐ Leaked	☐ Opened at: PSID ☐ Did Not Open	Air Inlet Opened at PSID ☐ Did Not Open Opened Fully ☐ CV PSID ☐ Leaked ☐ Cleaned	Closed Tight Leaked Cleaned Replaced Repair Other	☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐
REPAIR	☐ Cleaned REPLACED ☐ Disc ☐ Spring ☐ Guide ☐ Seat ☐ Module ☐ Rubber Kit ☐ O-Ring(s)	☐ Cleaned REPLACED ☐ Disc ☐ Spring ☐ Guide ☐ Seat ☐ Module ☐ Rubber Kit ☐ O-Ring(s)	☐ Cleaned REPLACED ☐ Disc(s) ☐ Spring ☐ Diaphragm ☐ Seat ☐ O-Ring(s) ☐ Module ☐ Rubber Kit	REPLACED ☐ Air Inlet Disc ☐ Air Inlet Spring ☐ Check Disc ☐ Check Spring			
Final Test	PSID ☐ Closed Tight	PSID ☐ Close Tight	Opened at PSID	Opened Fully ☐ Air Inlet PSID CK Valve PSID	Closed Tight	☐	☐

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

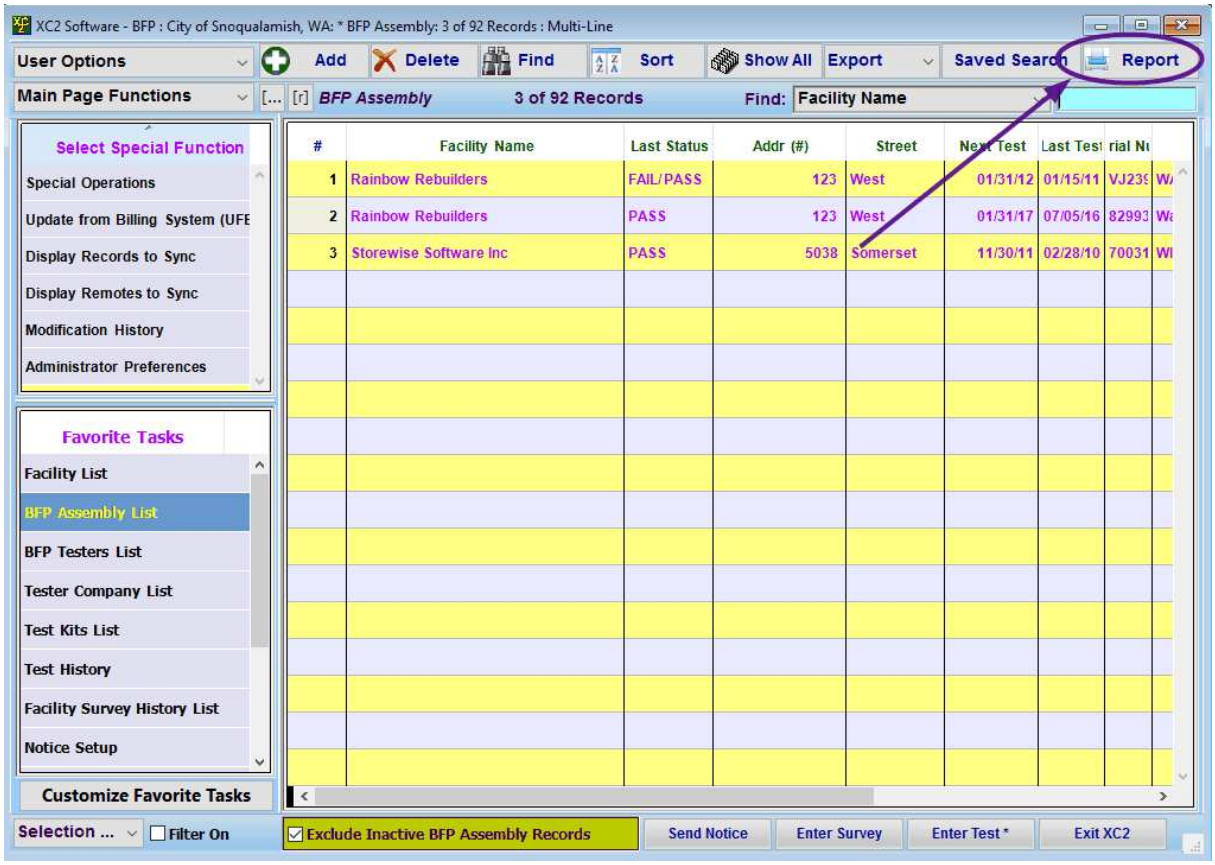
Print Current Active Certified Tester List

KB Asset ID: 3520

Printing a list of Active Certified testers

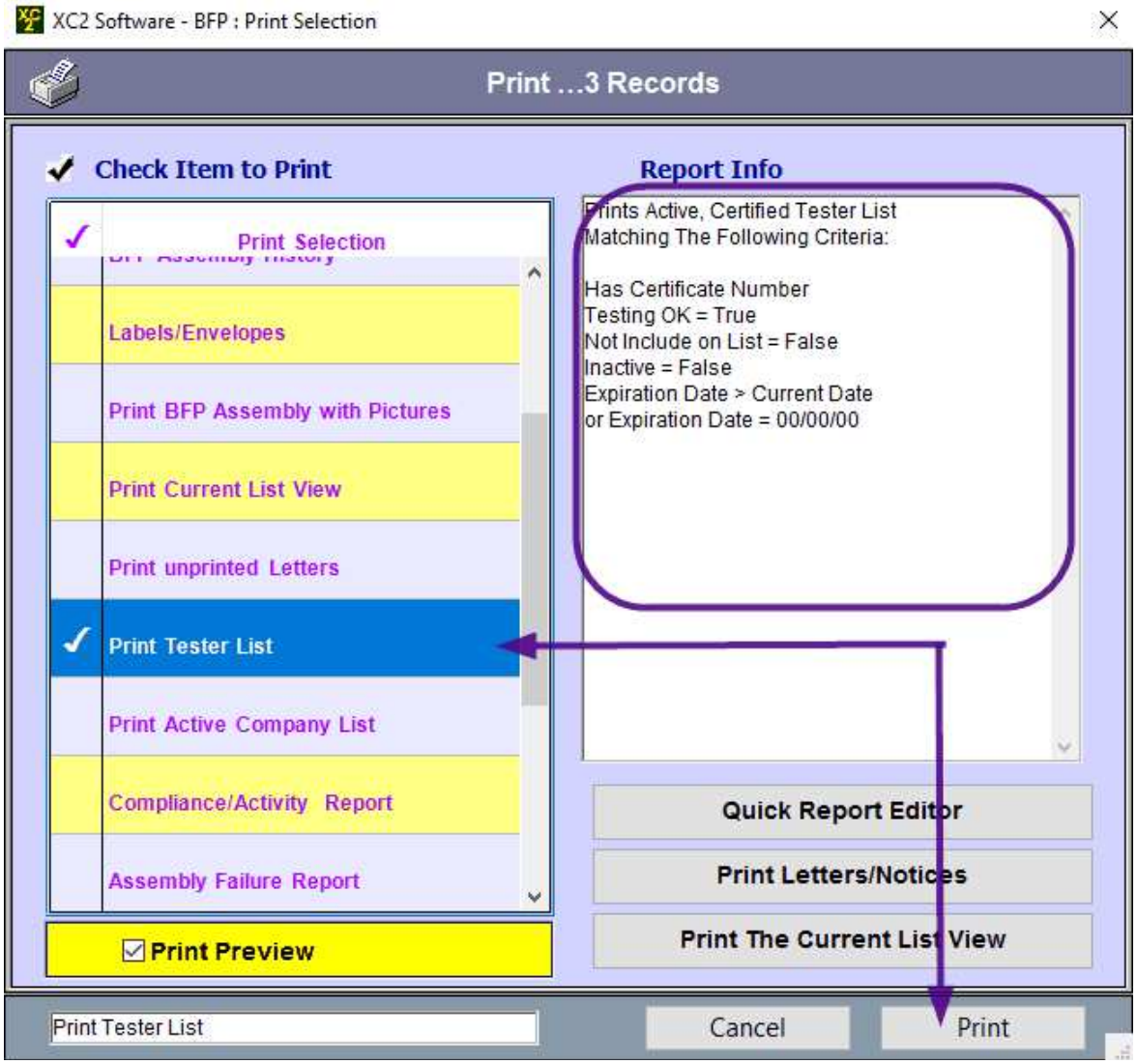
From The Main Screen

Click Report



Notes:

Select Print Testers List

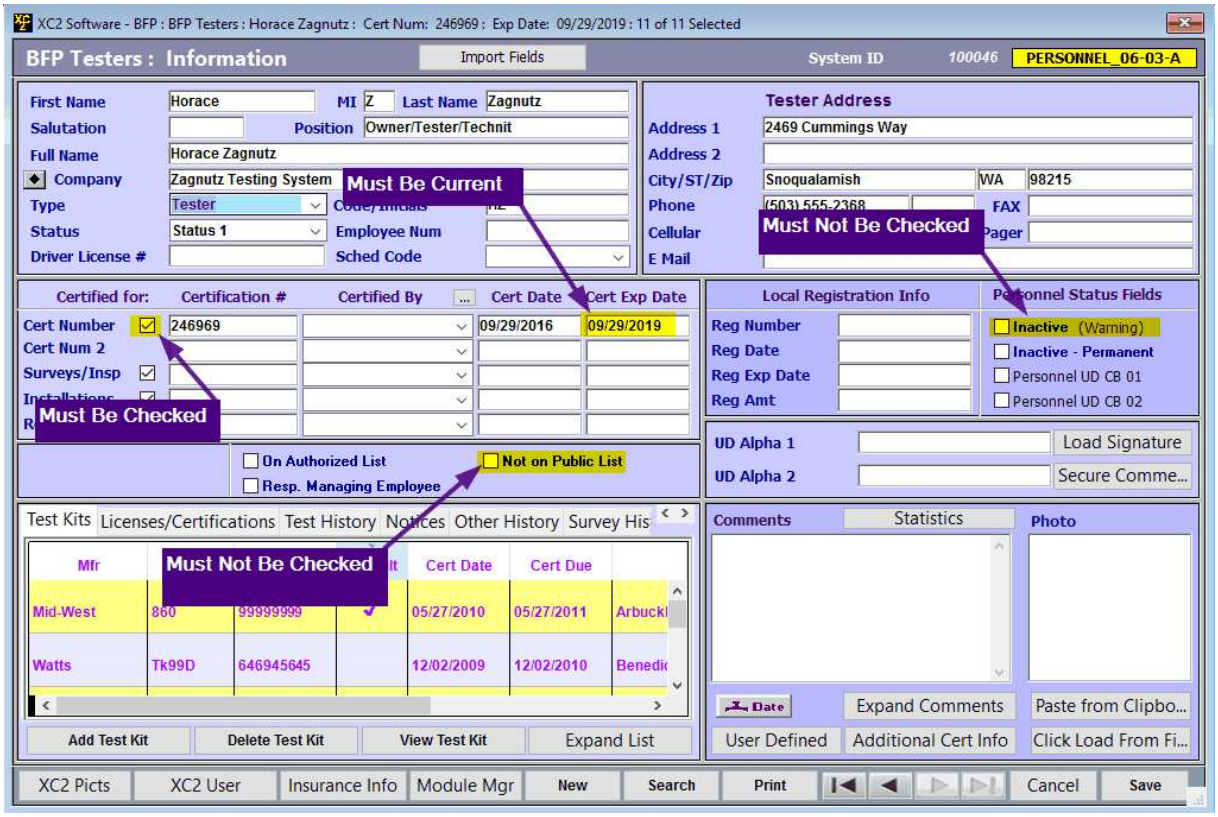


Notes:

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



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 Jimbob'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 Jimbob'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

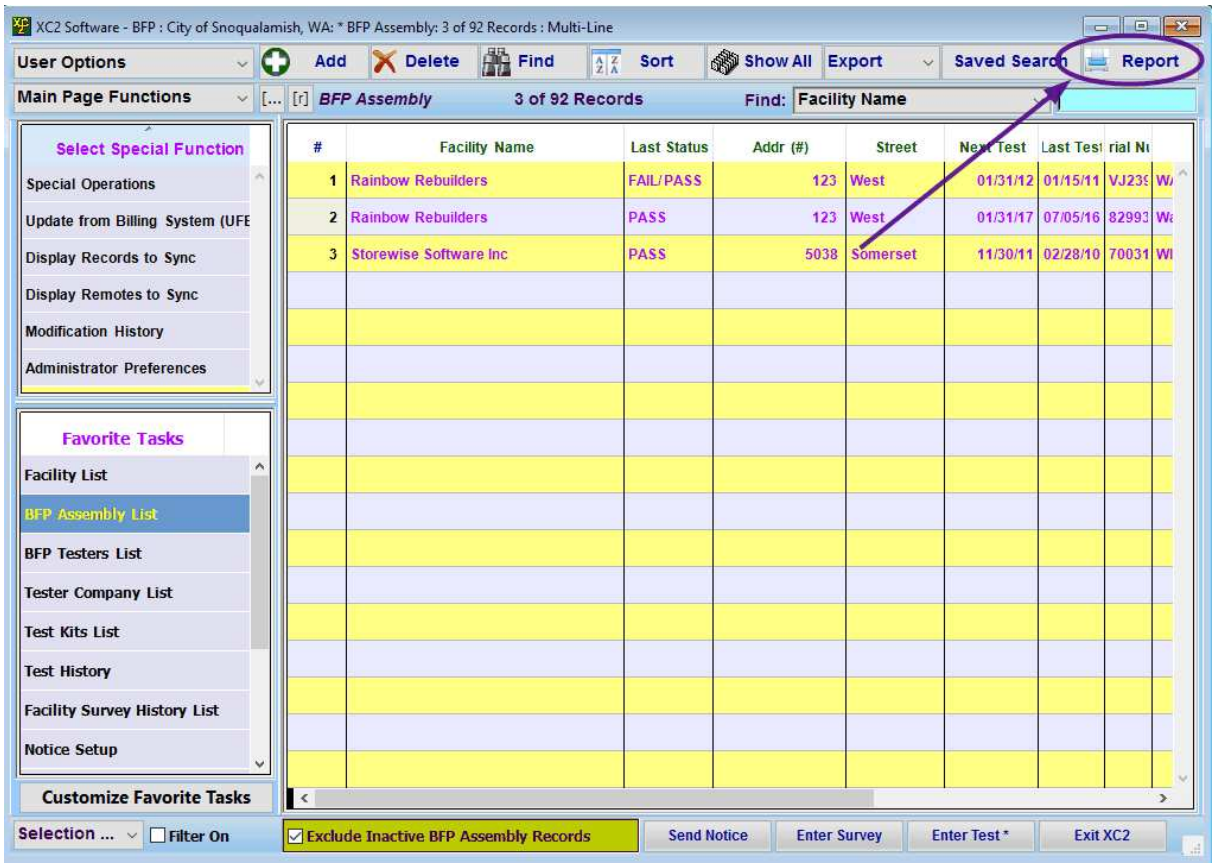
KB Asset ID: 2045

Page shows were in XC2 you can print blank Survey Forms

Report

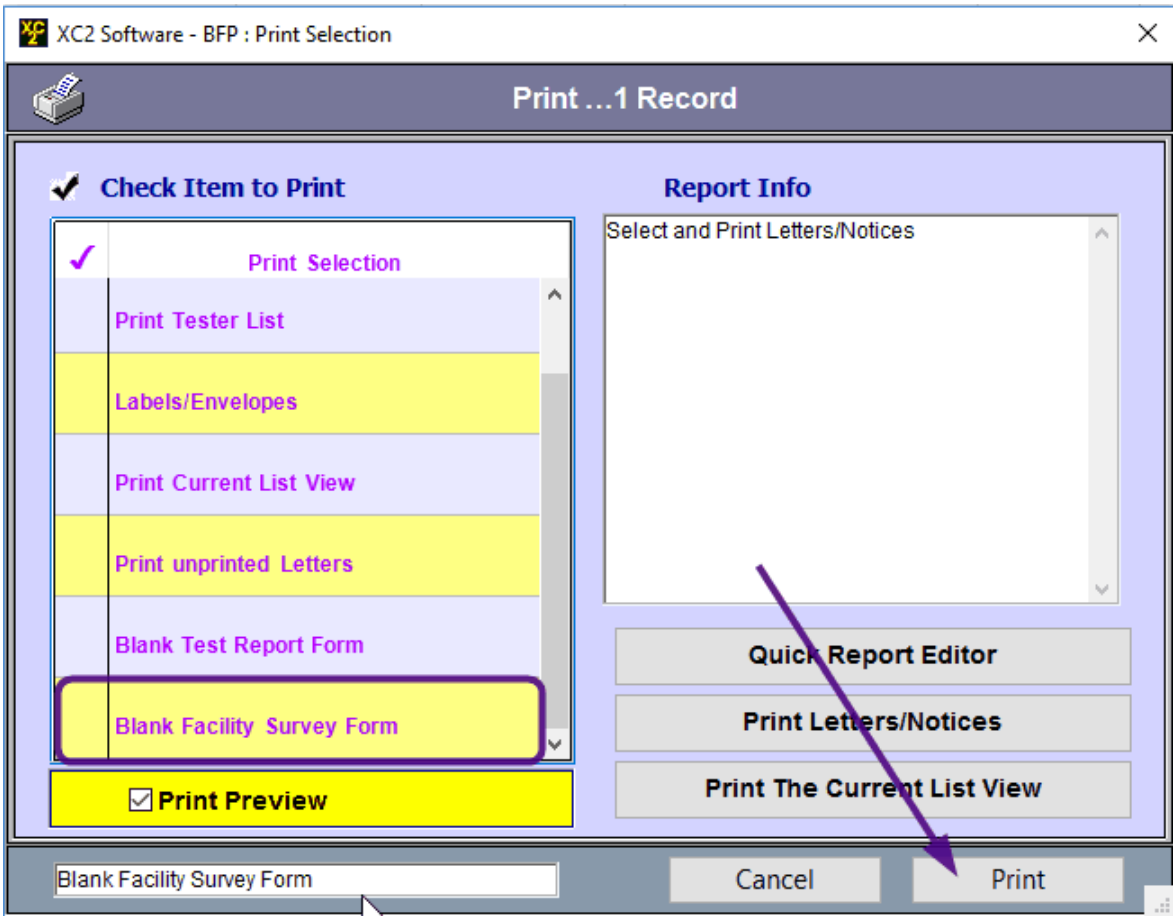
From the Main Screen

Click Report



Notes:

Select Blank Survey Form



Notes:

Sample Form

City of Snoqualamish, WA

Cross-Connection Control Survey/Inspection Report

Facility Name		**Survey Date**	
Facility Name 2		**Survey By**	
Service Loc/Address			
Contact Name		**Contact Phone**	
Area Name		**Acct Number**	
Service Type		**Facility Status**	
Comments			
BFP/CC Info			

# 1	Location Floor		Location Room		☐ Confined Space
	Equip Location				☐ UnApproved
	Type		Location ID		☐ Freeze Protection
	Mfr		Meter #	Map Page	
	Size		Hazard Type		
	Model		Haz. Level	Protection Type	
	Serial Num		Install Date	Status	

# 2	Location Floor		Location Room		☐ Confined Space
	Equip Location				☐ UnApproved
	Type		Location ID		☐ Freeze Protection
	Mfr		Meter #	Map Page	
	Size		Hazard Type		
	Model		Haz. Level	Protection Type	
	Serial Num		Install Date	Status	

# 3	Location Floor		Location Room		☐ Confined Space
	Equip Location				☐ UnApproved
	Type		Location ID		☐ Freeze Protection
	Mfr		Meter #	Map Page	
	Size		Hazard Type		
	Model		Haz. Level	Protection Type	
	Serial Num		Install Date	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

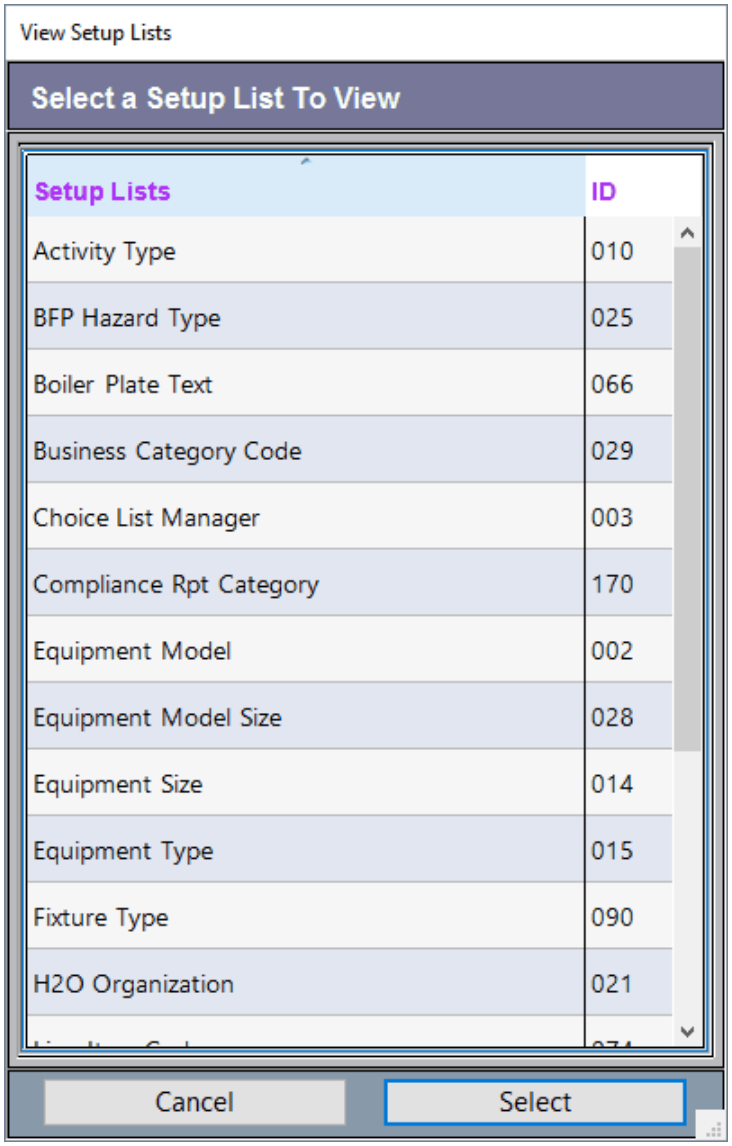
This Page Describes What the Lookup/Resource list is, and how to modify items in this area.

What is Lookup/Resources List?

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

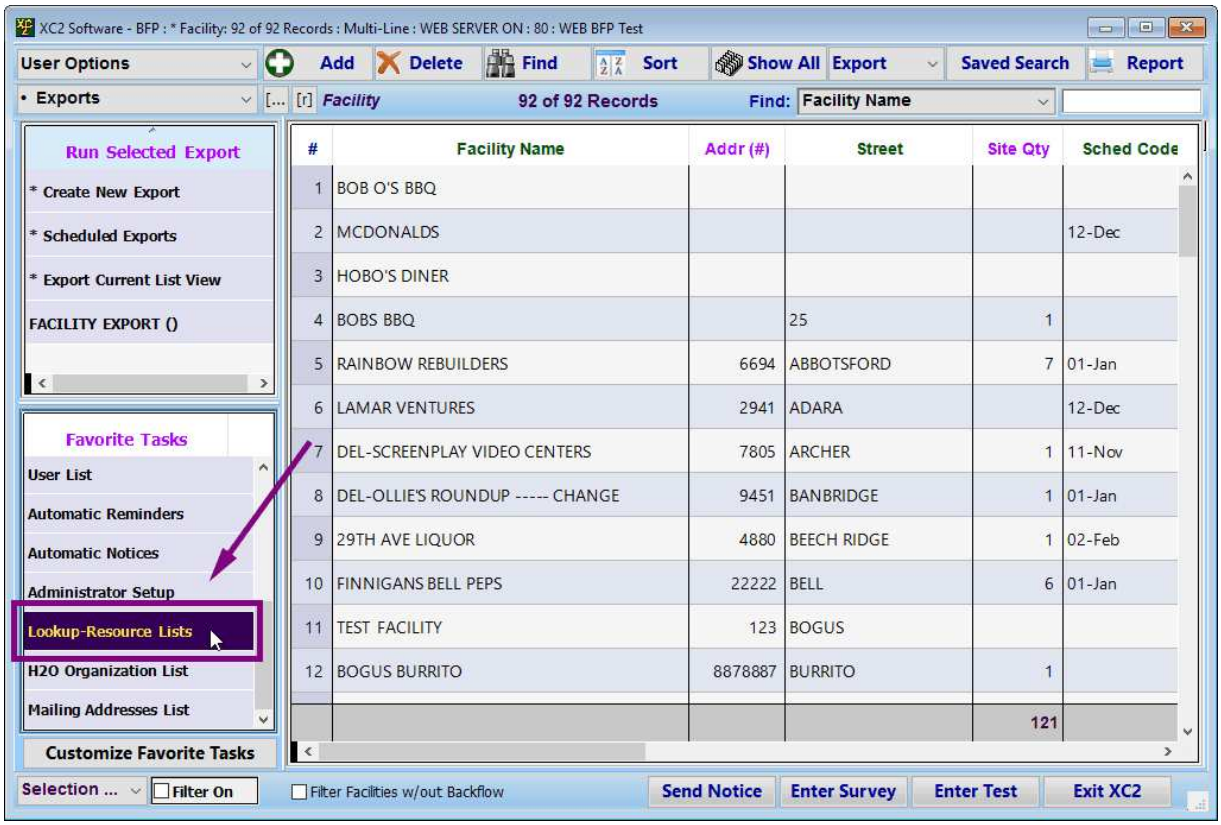
Items that can be customized in the lookup/resource area includes

1) Zip Codes
2) Equipment Types
3) H20 Organizations
4) Most Pulldown Menus
5) Hazard Types



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 demostrate an example of how to create a new zip code

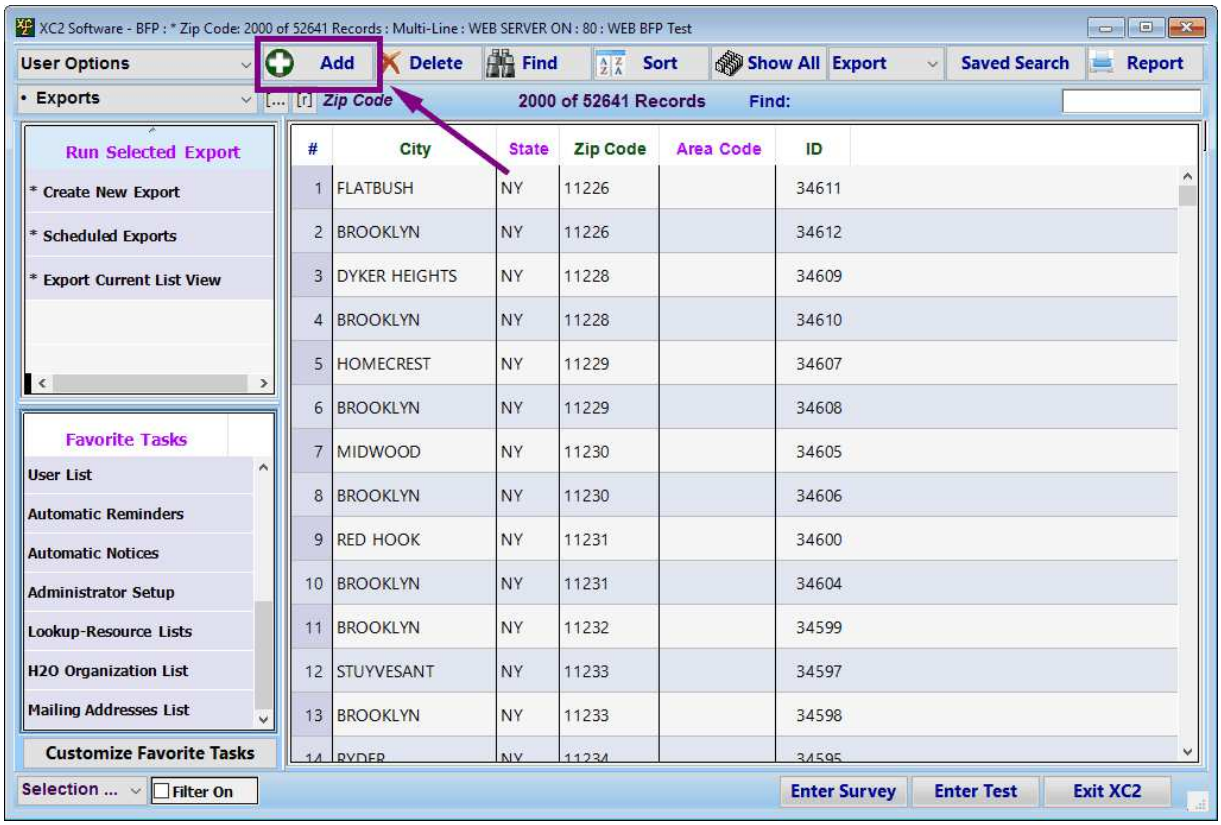
Create a new Zip Code record

Highligh Zip Code and click select

Notes:

Add New Zip Code Record

Click Add to create a new Zip Code Record

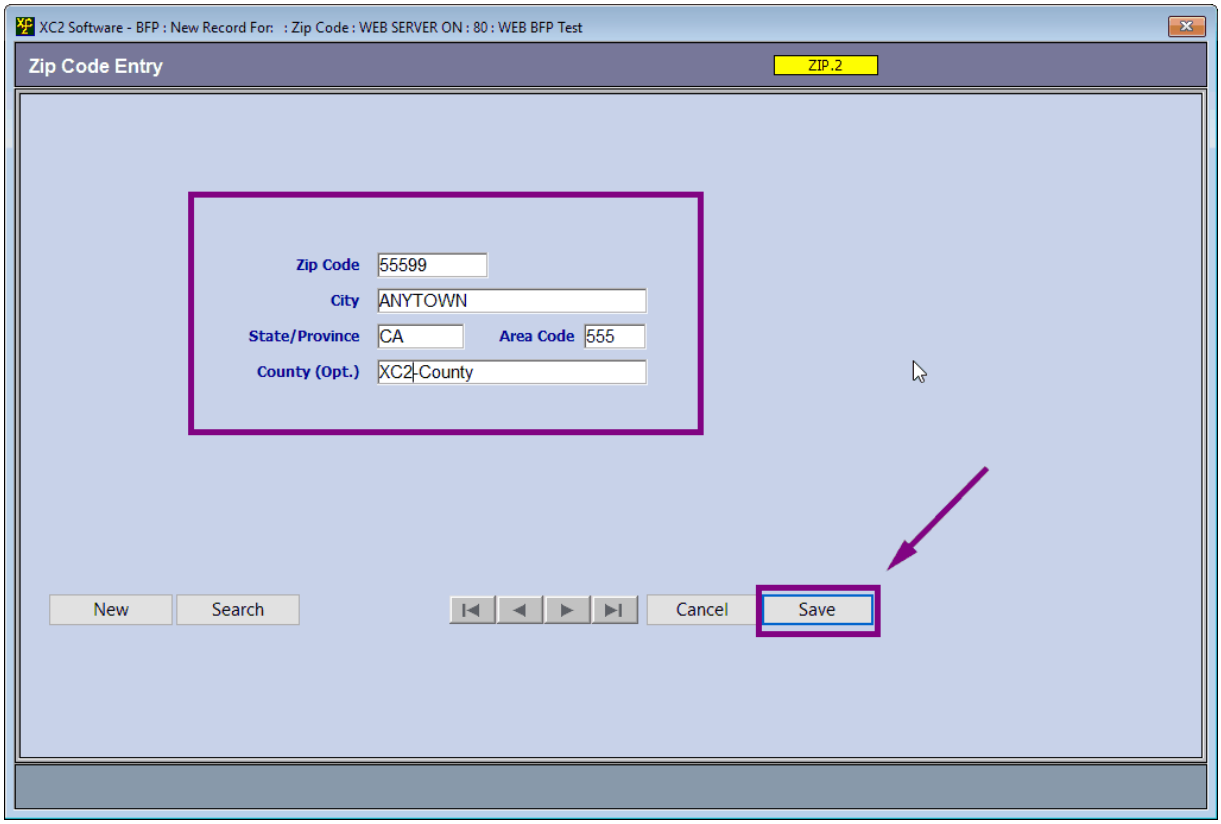


Notes:

Save You New Entry

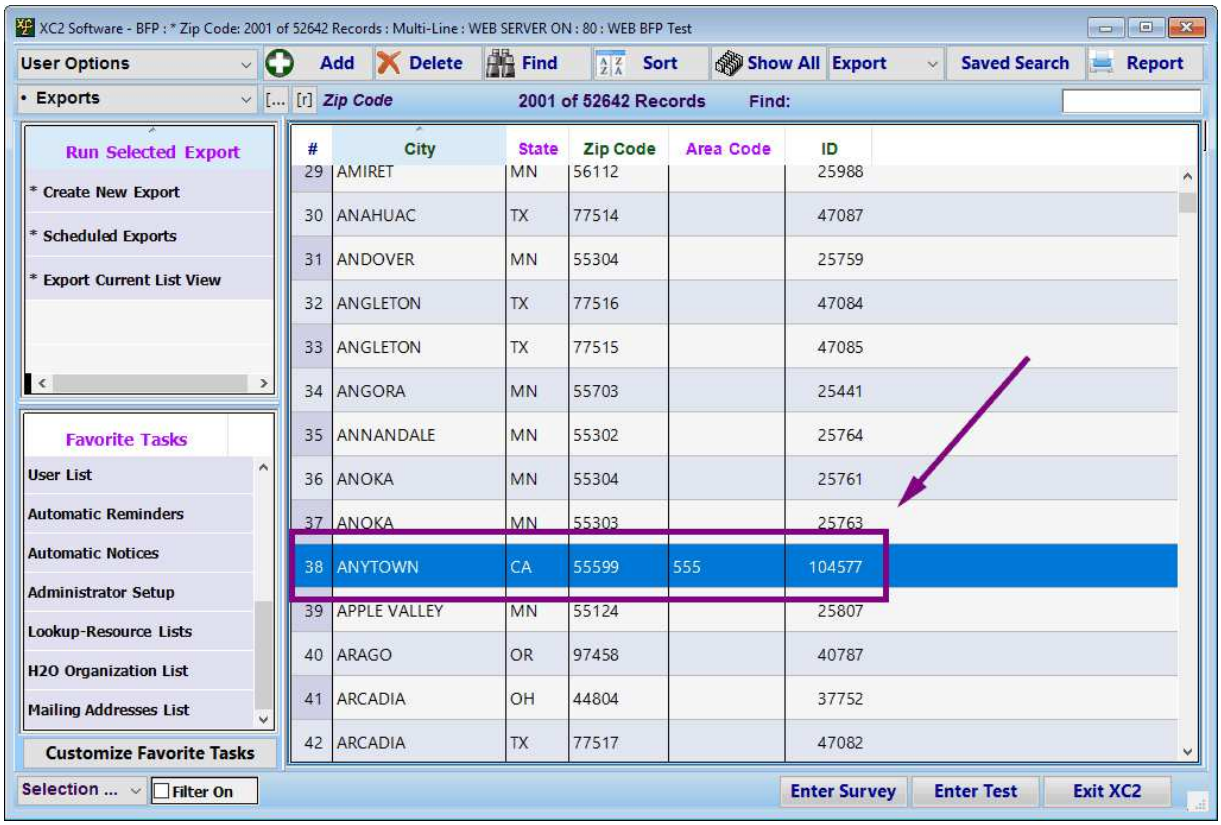
Enter

Zip Code
City
State
Area Code (optional)



Notes:

Zipcode will be Added



#	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

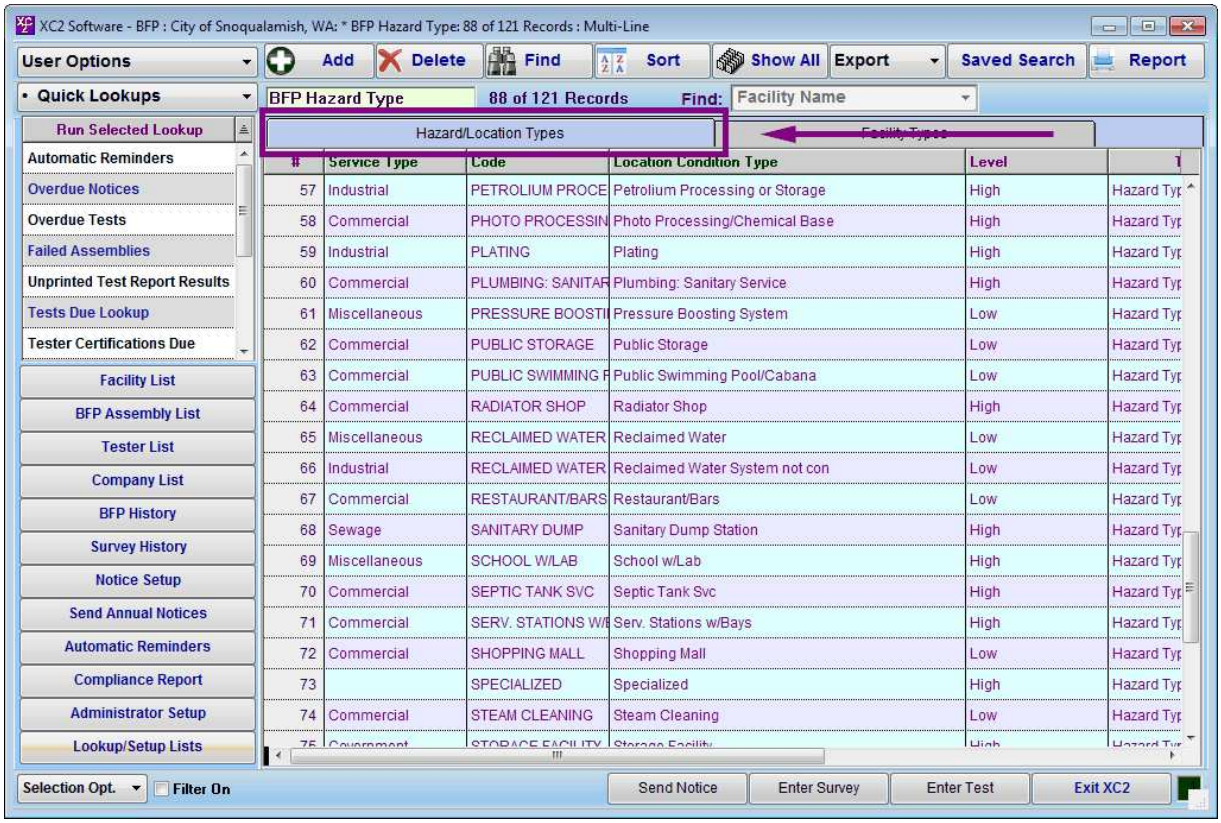
Hazard Types and Facility Types are used to categorize Assembly records and Facility records in XC2.

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

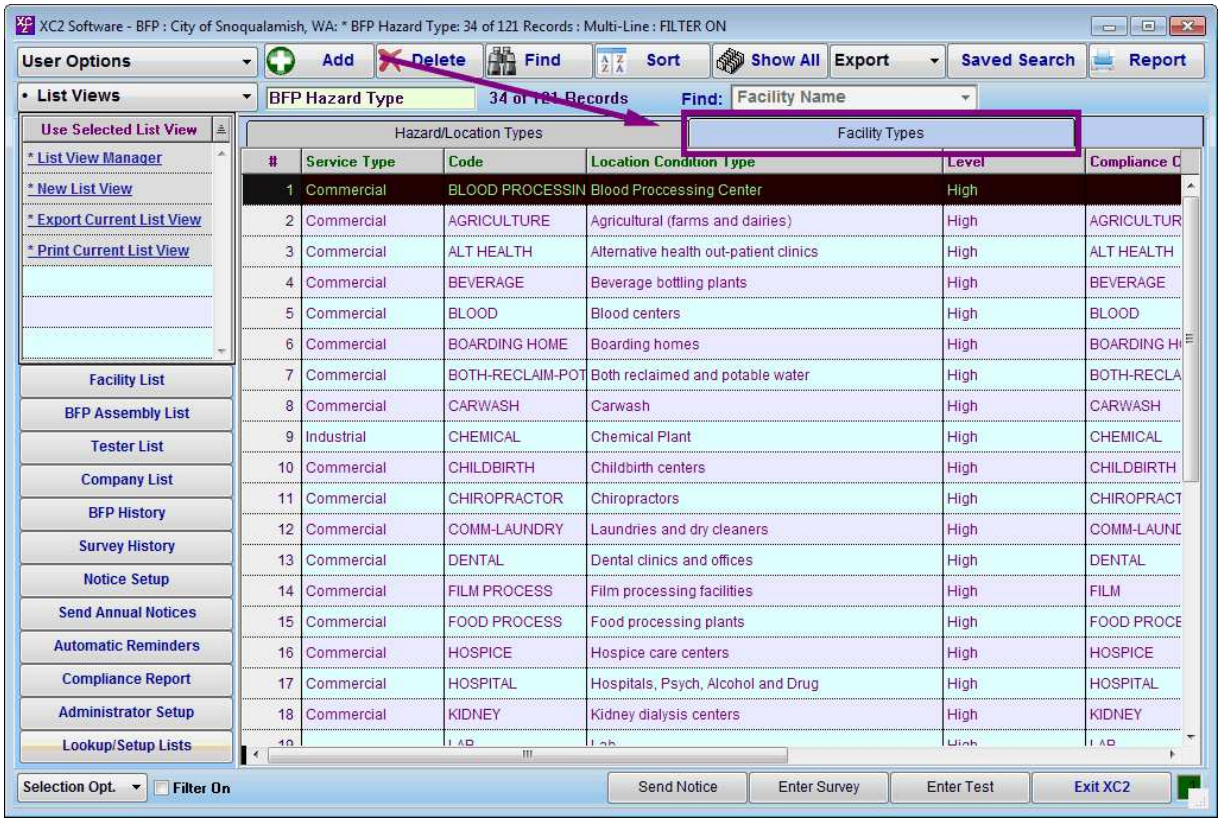


Notes:

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



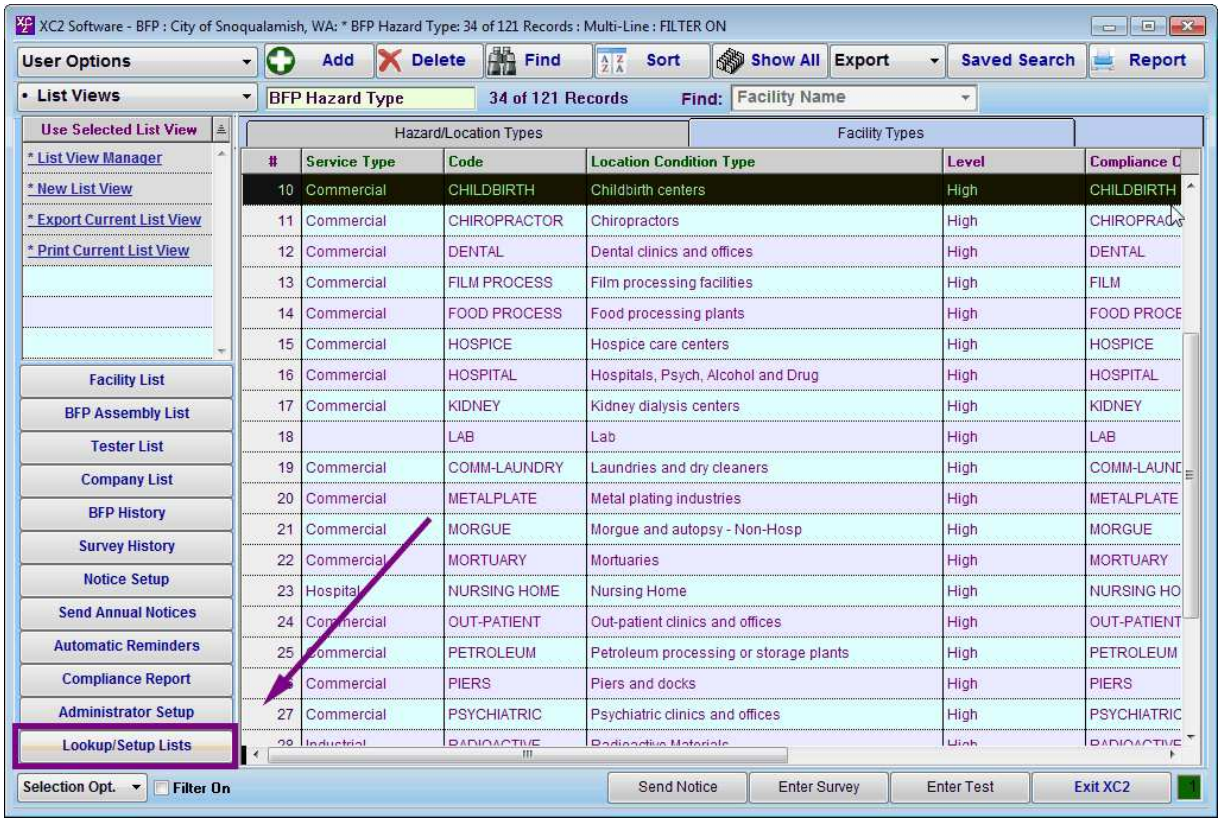
#	Service Type	Code	Location Condition Type	Level	Compliance C
1	Commercial	BLOOD PROCESSIN	Blood Processing Center	High	
2	Commercial	AGRICULTURE	Agricultural (farms and dairies)	High	AGRICULTUR
3	Commercial	ALT HEALTH	Alternative health out-patient clinics	High	ALT HEALTH
4	Commercial	BEVERAGE	Beverage bottling plants	High	BEVERAGE
5	Commercial	BLOOD	Blood centers	High	BLOOD
6	Commercial	BOARDING HOME	Boarding homes	High	BOARDING H
7	Commercial	BOTH-RECLAIM-POT	Both reclaimed and potable water	High	BOTH-RECLA
8	Commercial	CARWASH	Carwash	High	CARWASH
9	Industrial	CHEMICAL	Chemical Plant	High	CHEMICAL
10	Commercial	CHILDBIRTH	Childbirth centers	High	CHILDBIRTH
11	Commercial	CHIROPRACTOR	Chiropractors	High	CHIROPRACT
12	Commercial	COMM-LAUNDRY	Laundries and dry cleaners	High	COMM-LAUND
13	Commercial	DENTAL	Dental clinics and offices	High	DENTAL
14	Commercial	FILM PROCESS	Film processing facilities	High	FILM
15	Commercial	FOOD PROCESS	Food processing plants	High	FOOD PROCE
16	Commercial	HOSPICE	Hospice care centers	High	HOSPICE
17	Commercial	HOSPITAL	Hospitals, Psych, Alcohol and Drug	High	HOSPITAL
18	Commercial	KIDNEY	Kidney dialysis centers	High	KIDNEY

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



Notes:

Click on BFP Hazard Types

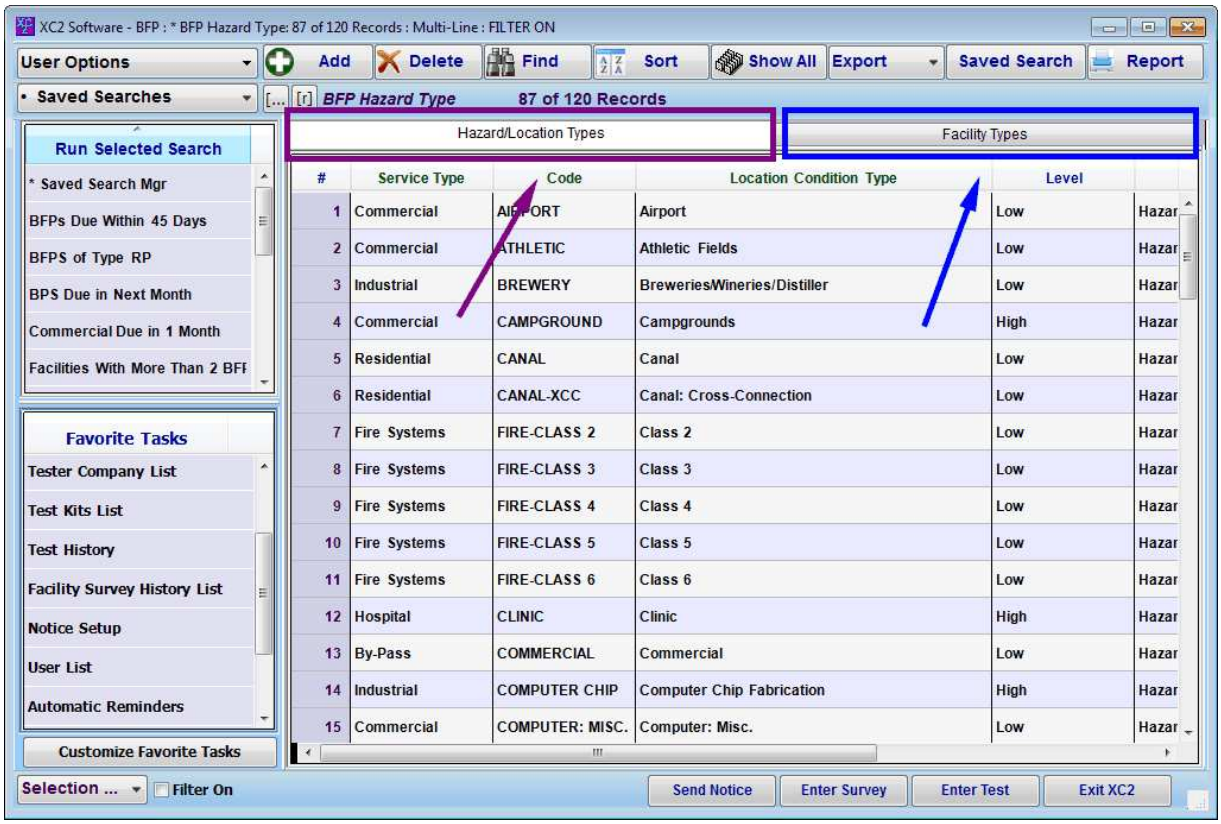
Notes:

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

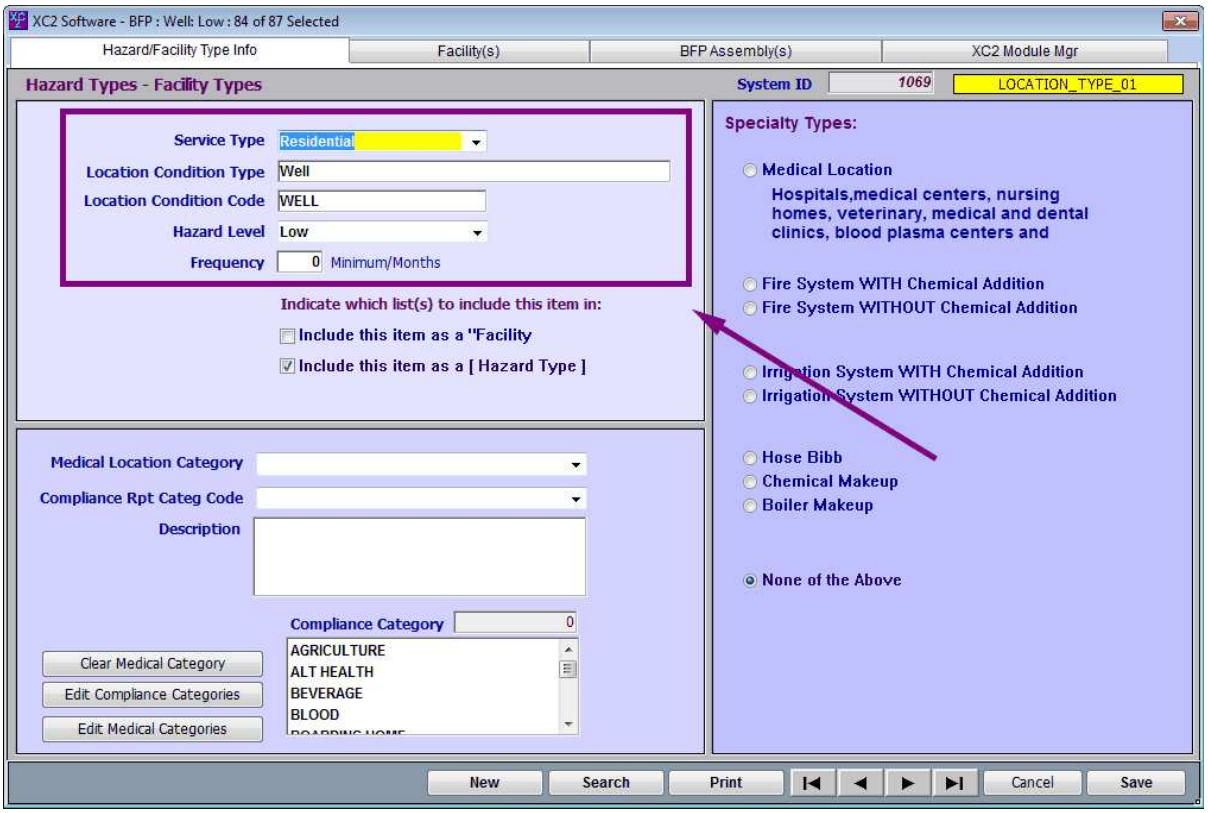
If you want to create a New Hazard or Facility Type Click the Add Button.

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:

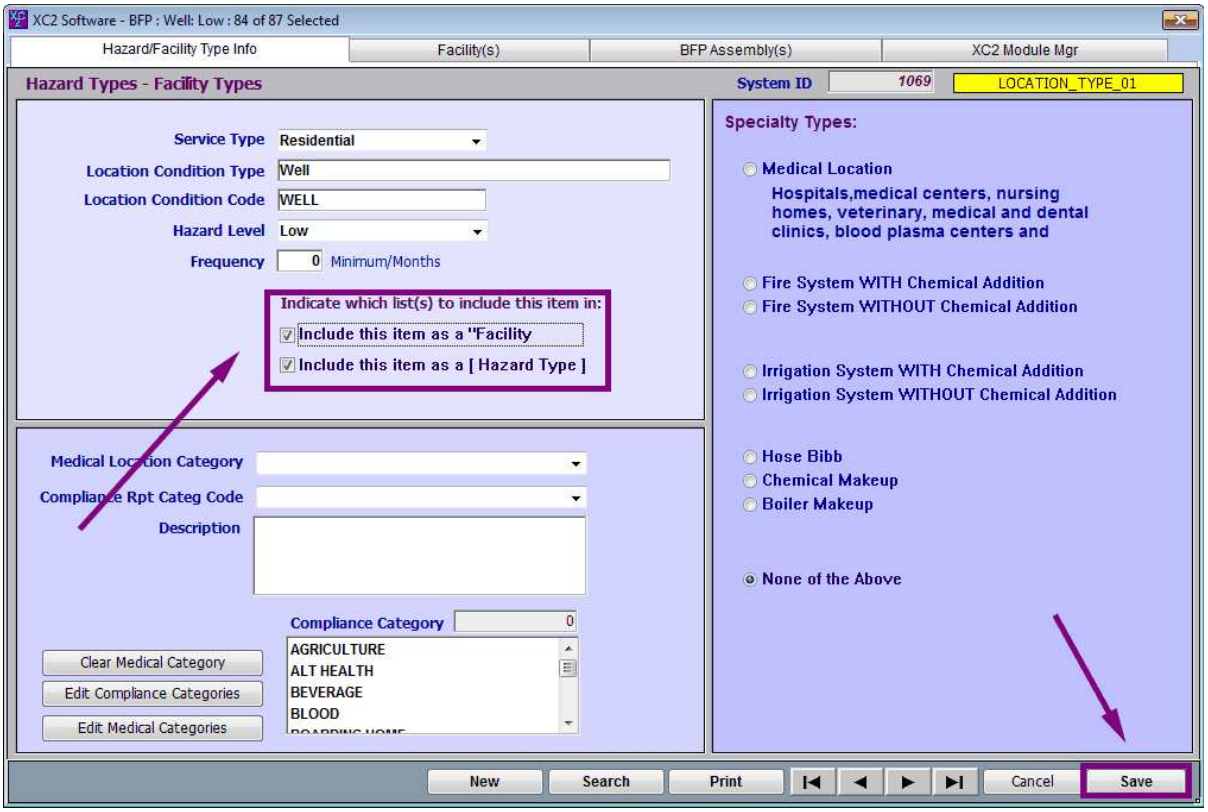
Select What Type It is

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:

XC2 Software Knowledge Base

How to Manually add New Backflow Models in XC2

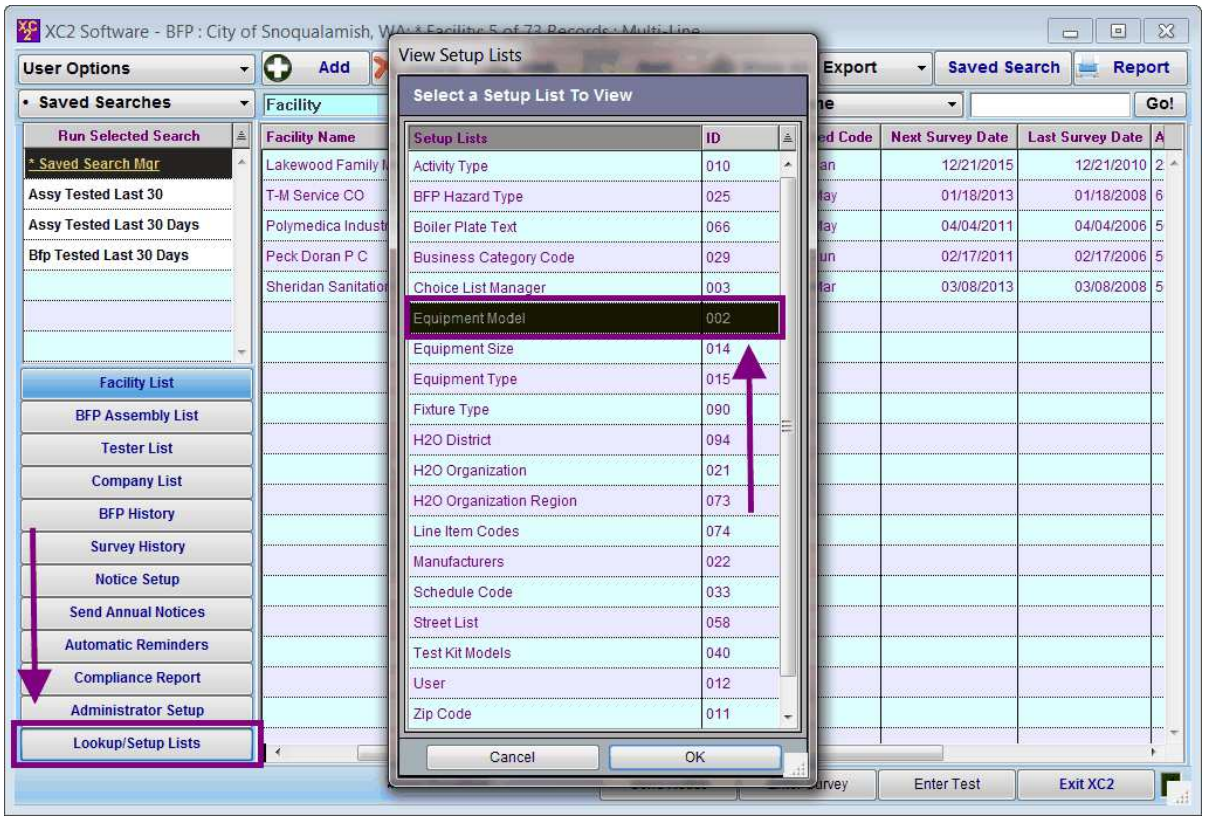
KB Asset ID: 2171

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

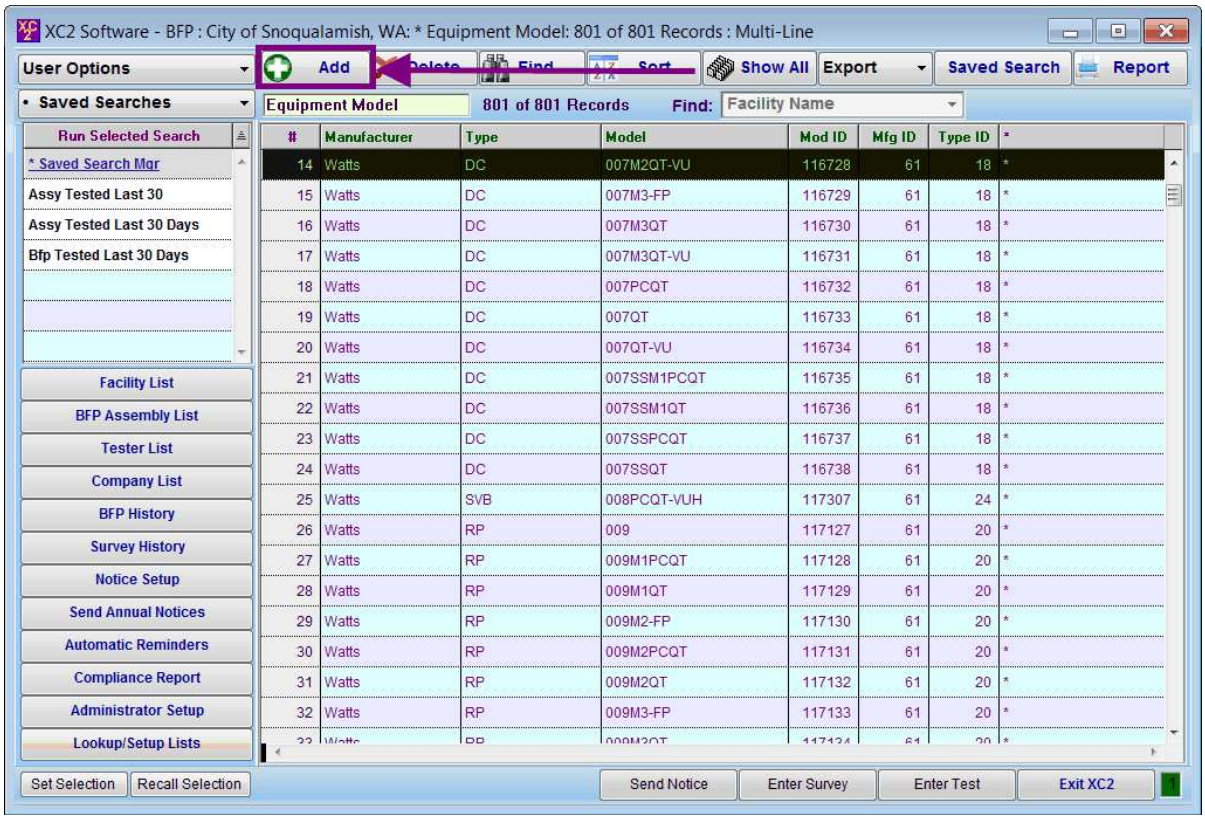
Select Backflow Model



Notes:

Click Add

Click add to create a new Backflow Model Record



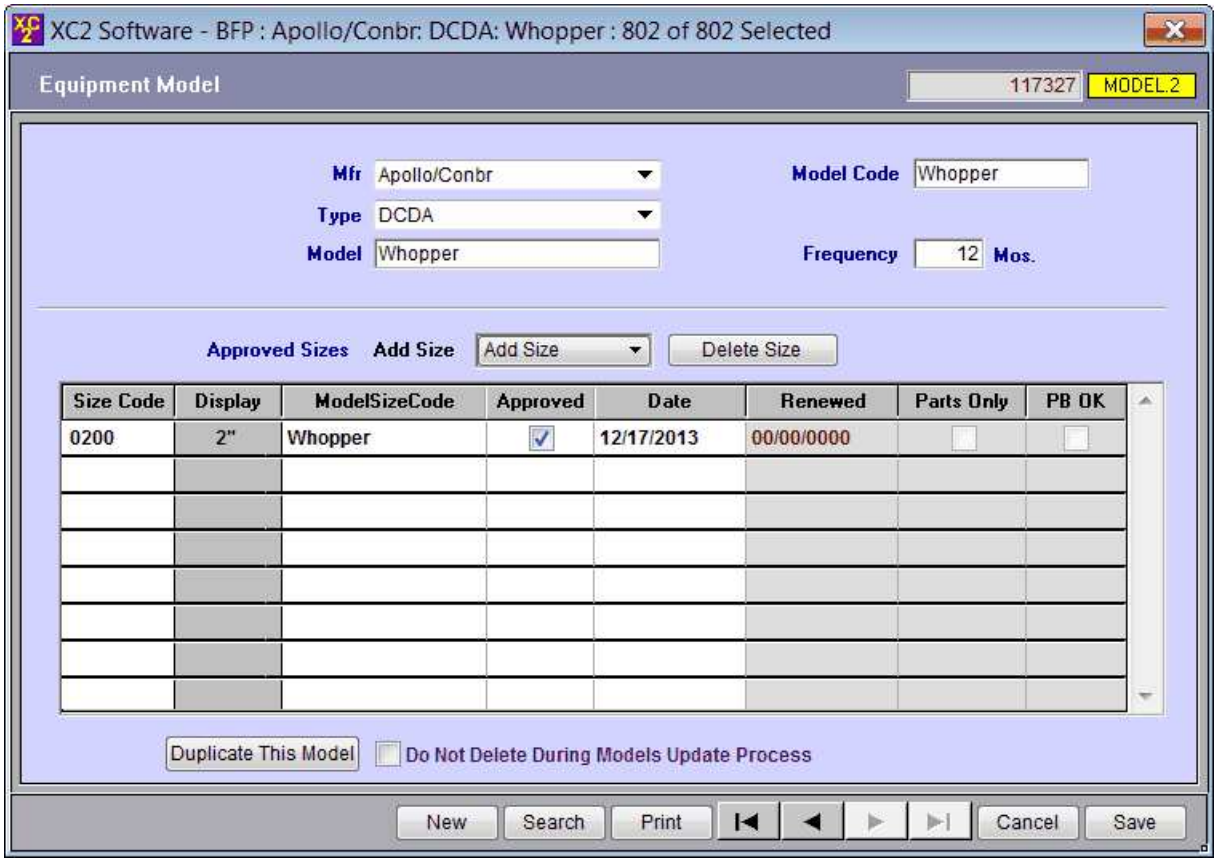
Notes:

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



Notes:

Is This An Approved Model Size

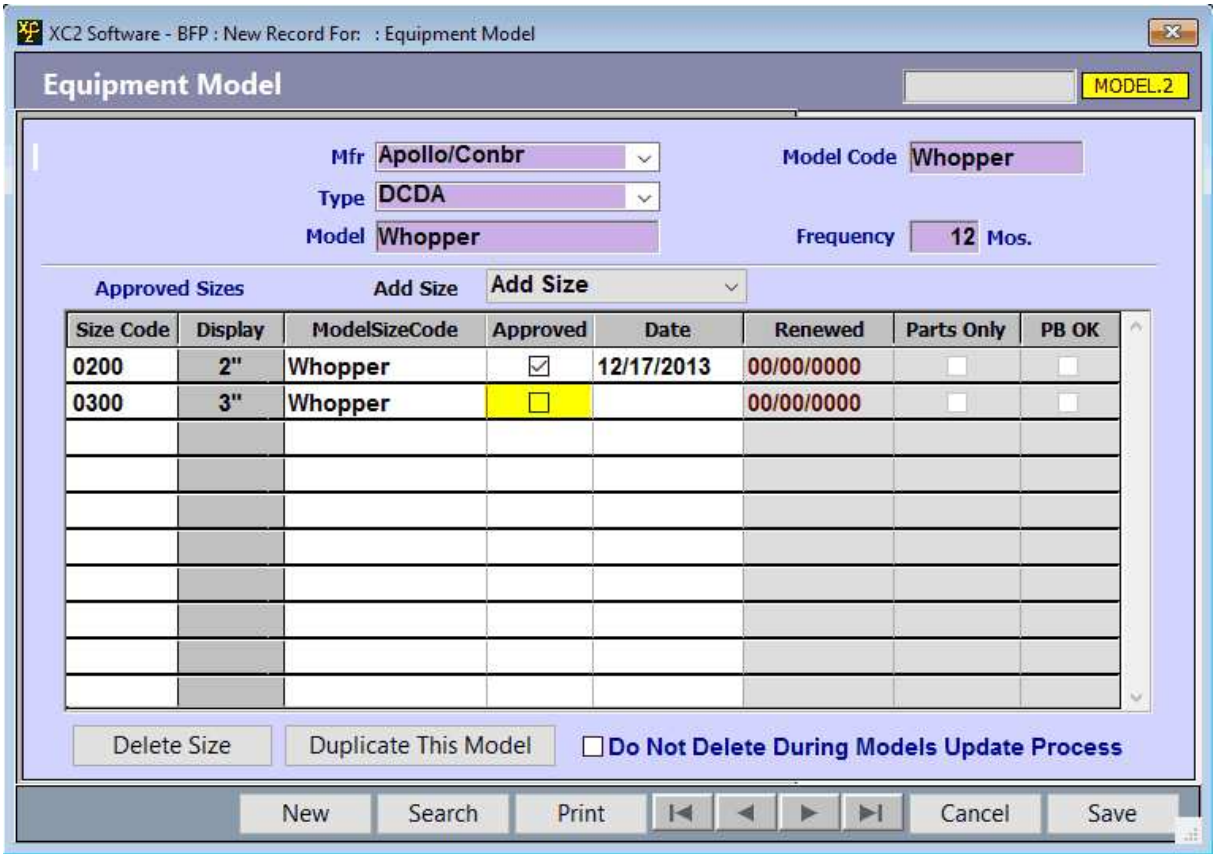
Should The Model/Size Be On The Approved Device List

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 disignated Approved.



Notes:

XC2 Software Knowledge Base

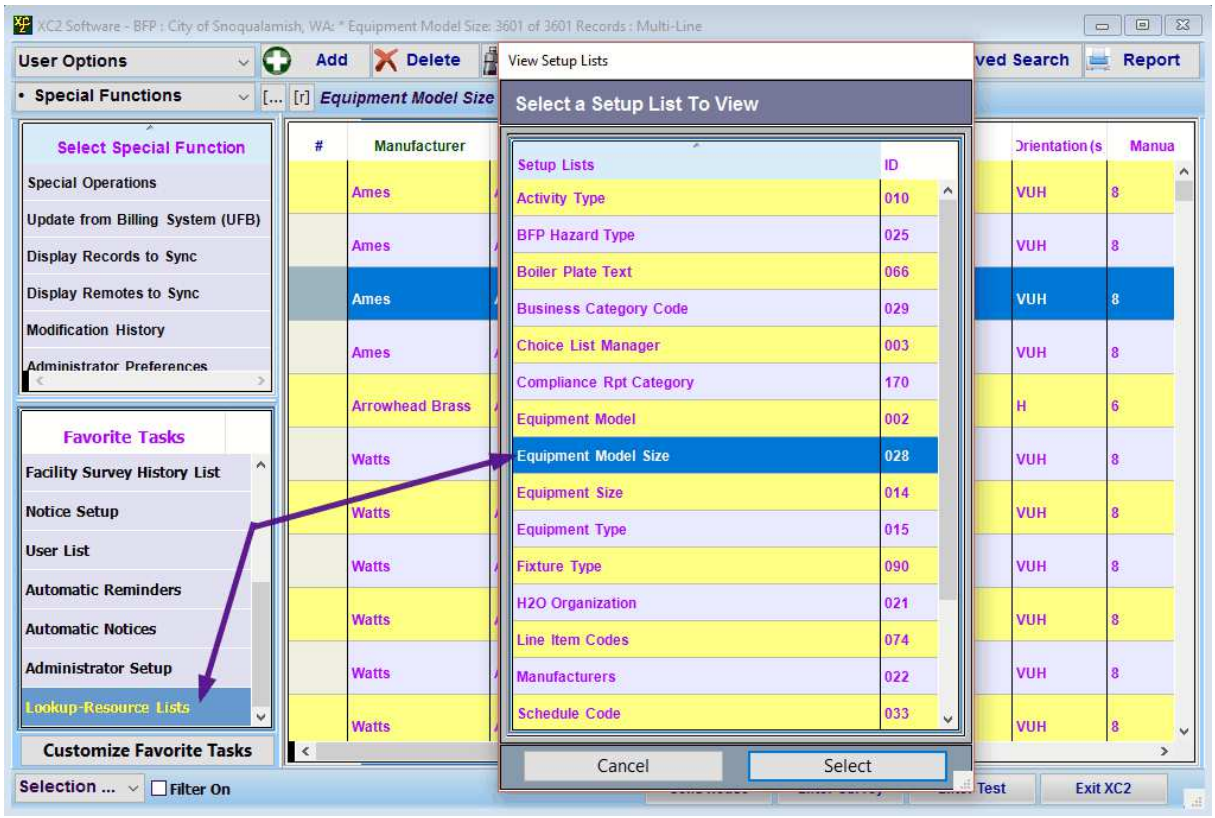
How To Add Backflow Model Sizes

KB Asset ID: 3526

Creating Backflow Model Sizes

Access Backflow Models Size List

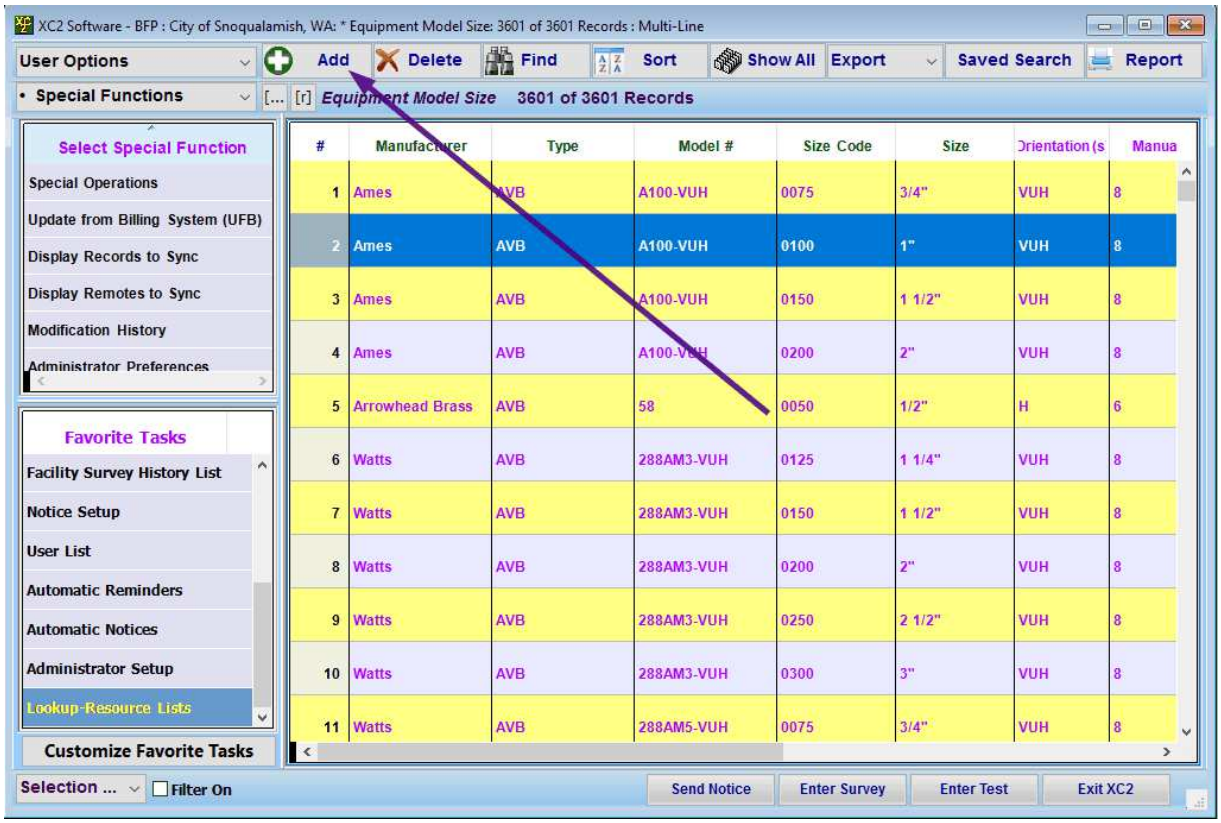
- Look-Up Resorce List
- Equipment Model Size



Notes:

Add New Size

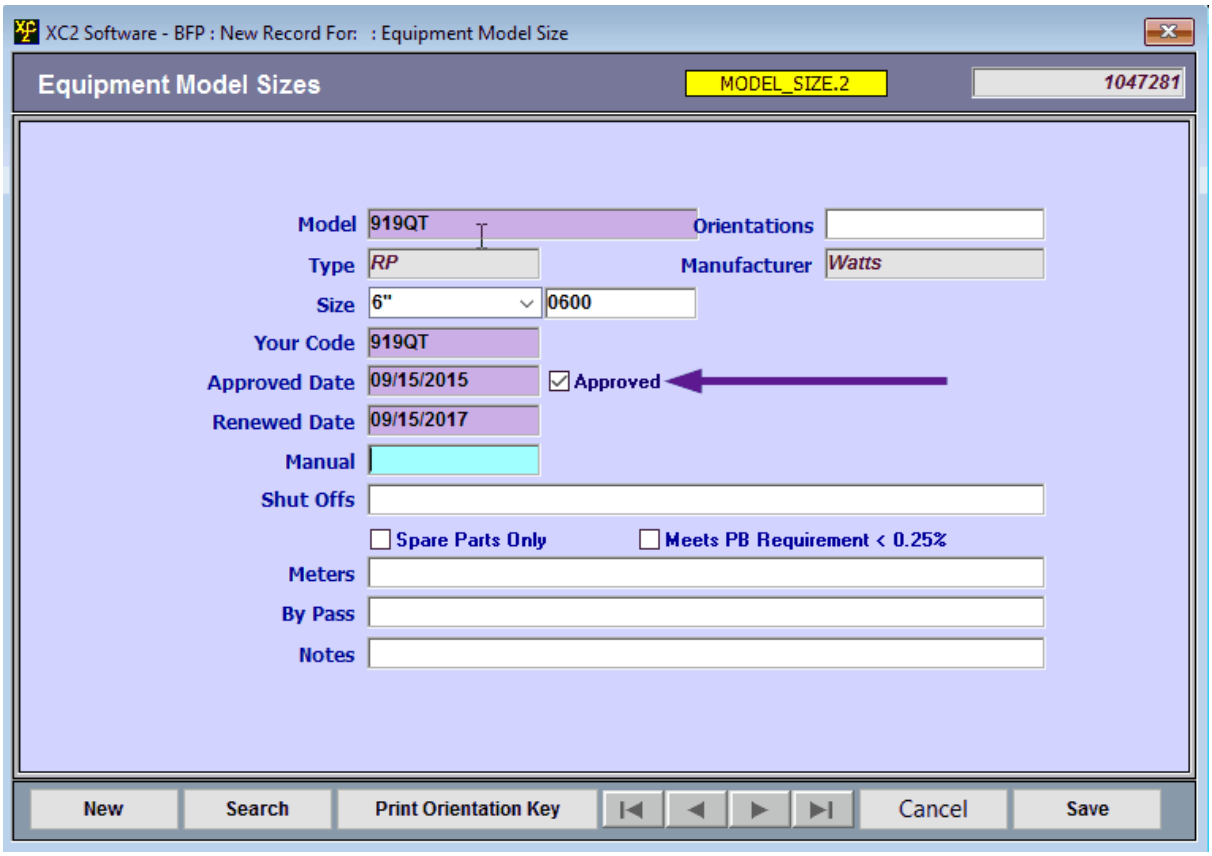
Click the ADD button



Notes:

Create Record

Enter all needed information



Notes:

Should The Model Size Be On Approved List?

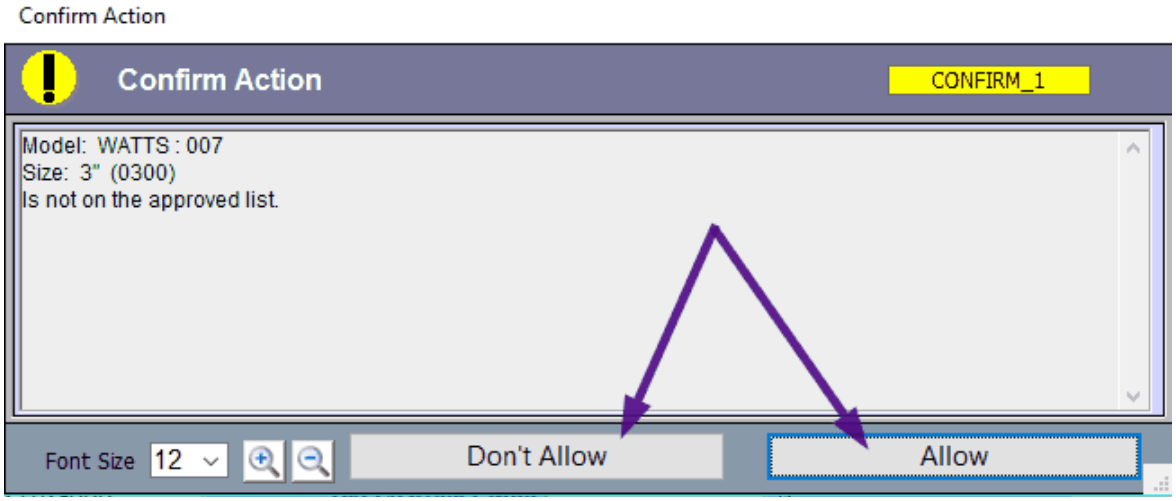
Should The Model/Size Be On The Approved Device List

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.



Notes:

XC2 Software Knowledge Base

How to Add New Equipment Manufacturers

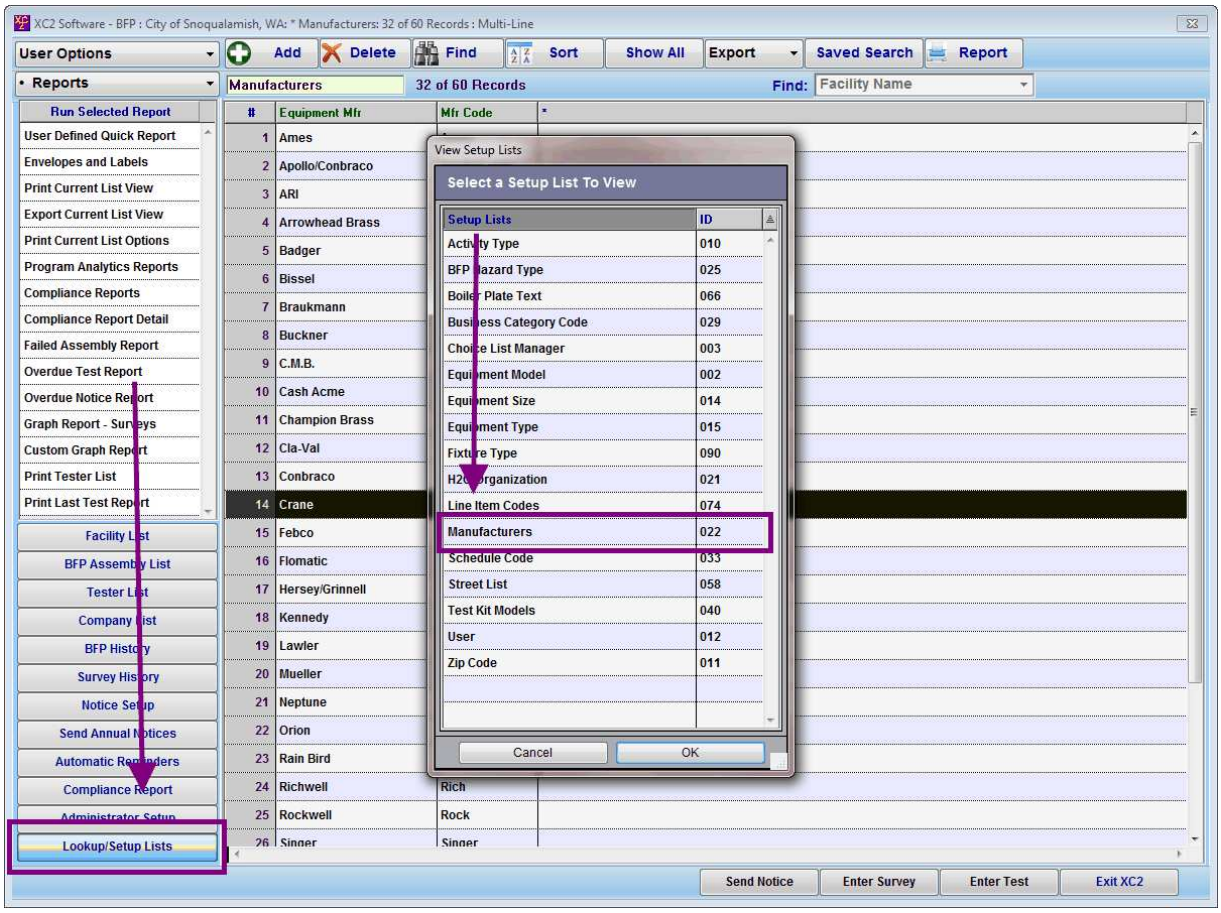
KB Asset ID: 2069

How to Manually Add New Equipment Manufacturers

Lookup/Setup Lists

The Manufacturer List Can be found in Lookup/Setup Lists

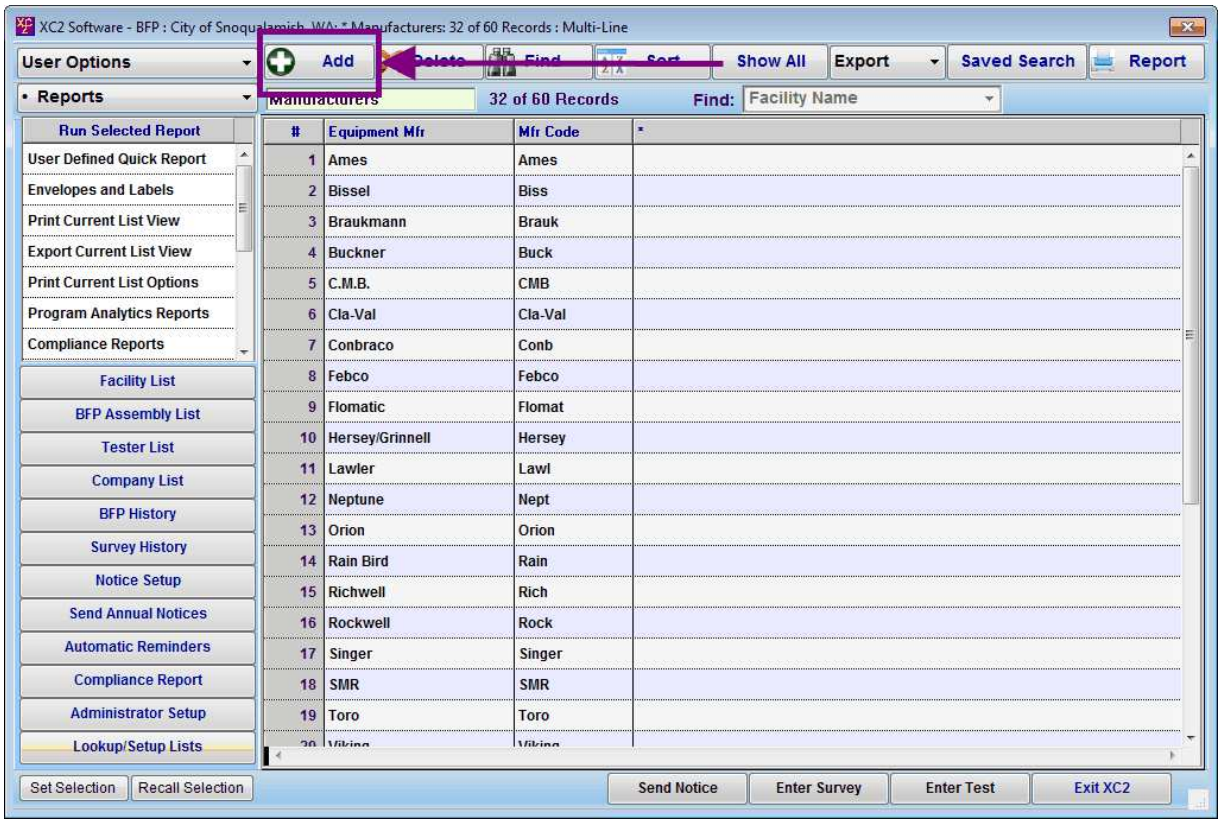
Select Manufacturer to open



Notes:

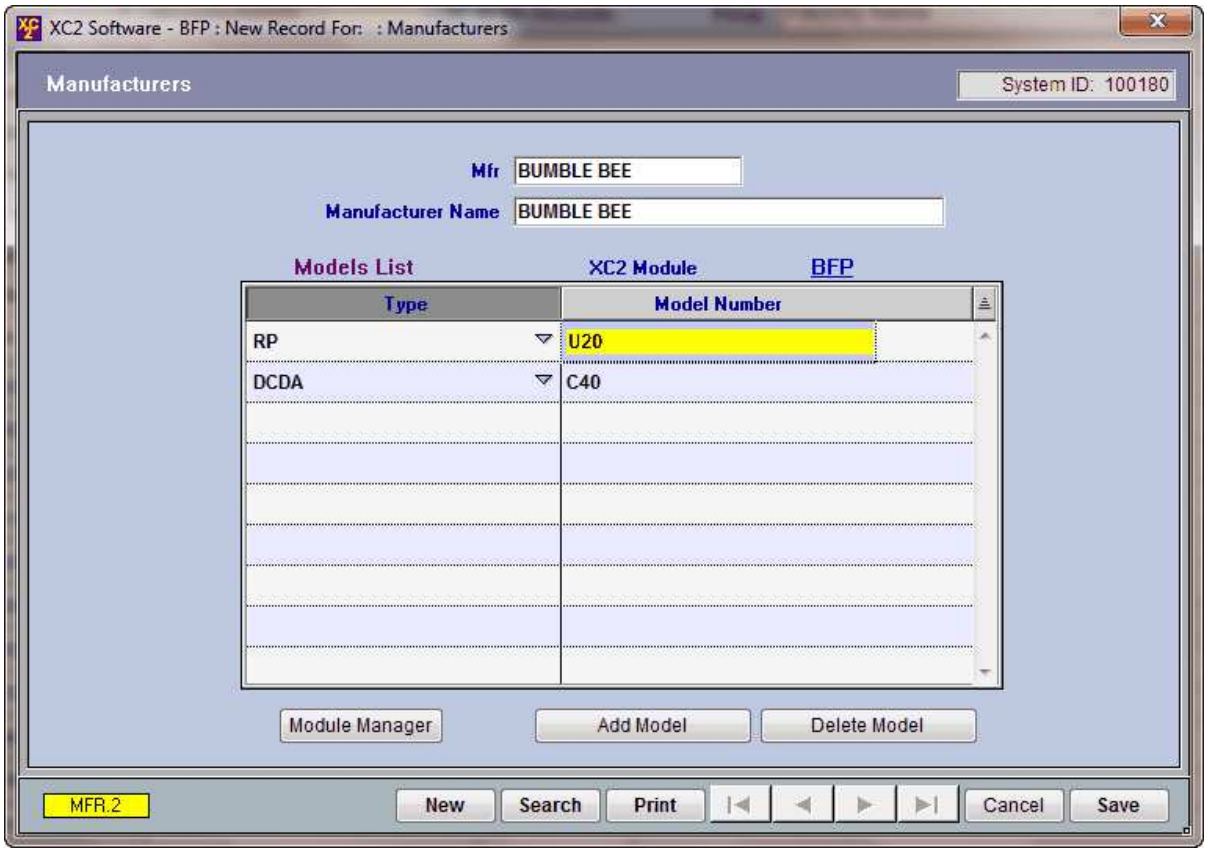
The Manufactur list should populate.

Click Add to Add a New Manufacturer



Notes:

Add all information



Notes:

XC2 Software Knowledge Base

Adding New Test Kit Models

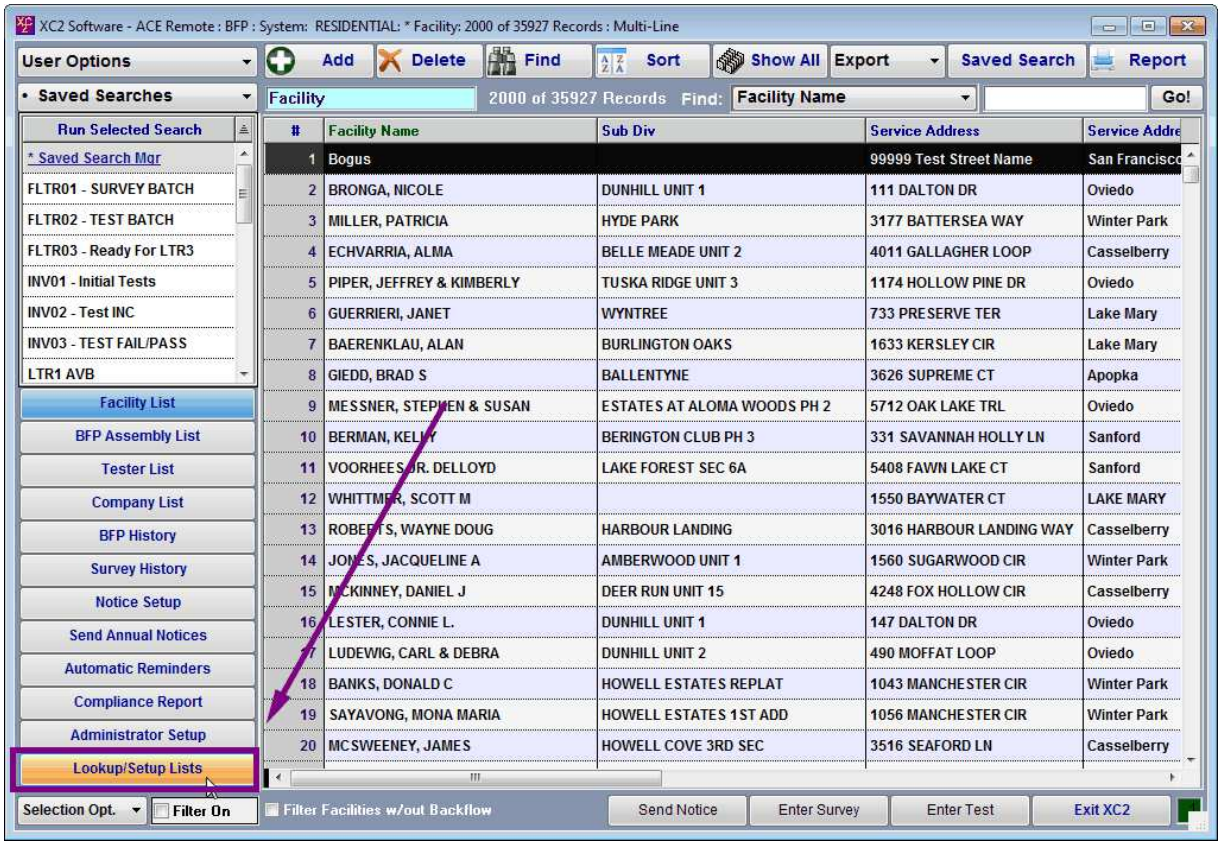
KB Asset ID: 2656

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 Resourses menu.

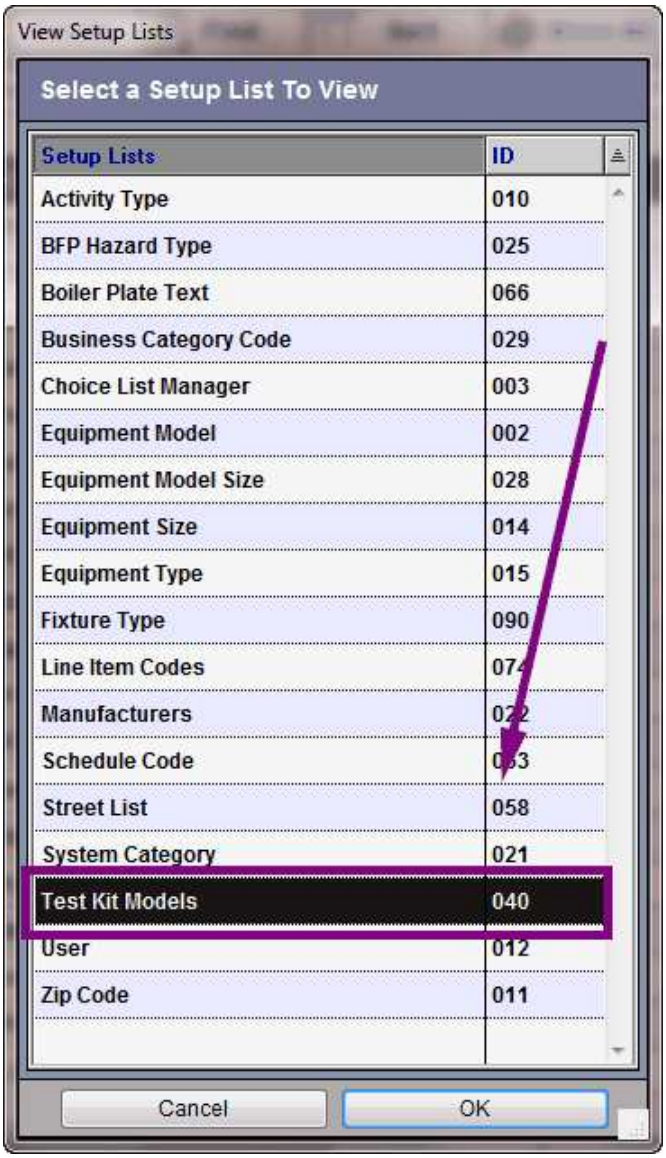
Click Lookup/Setup Lists



Notes:

Test Kit Models

Double Click Choice Test Kit Models

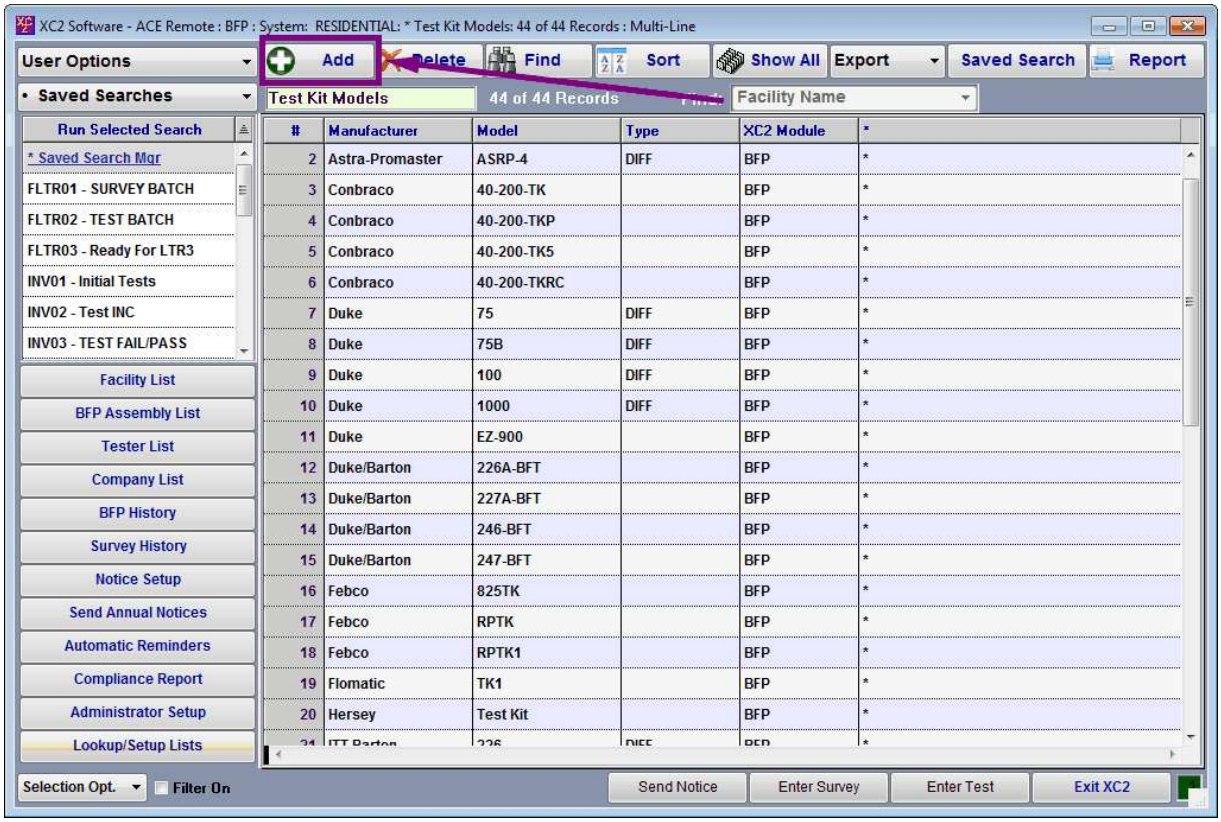


Notes:

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



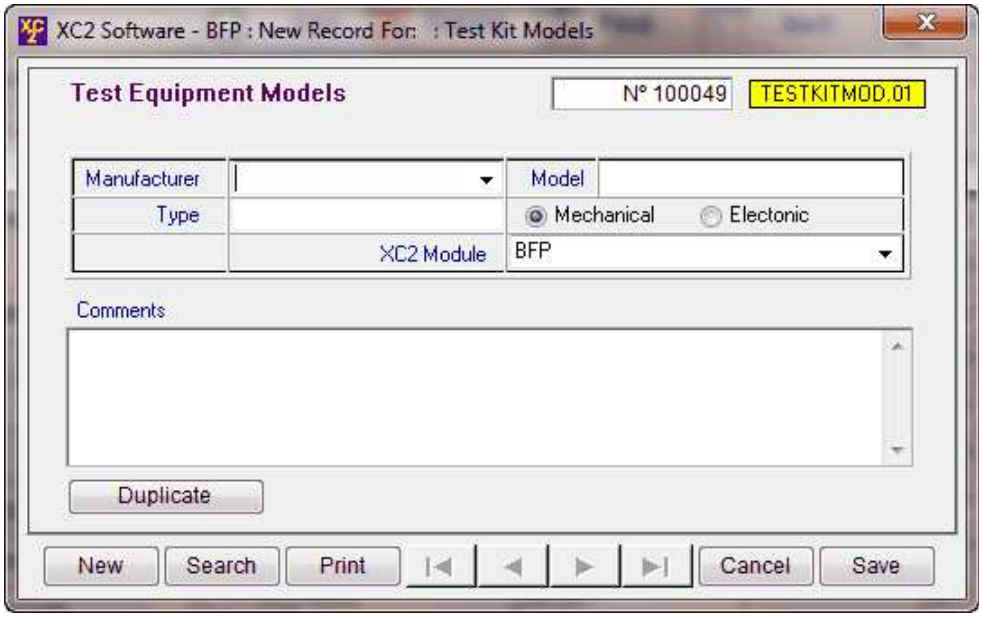
#	Manufacturer	Model	Type	XC2 Module	*
2	Astra-Promaster	ASRP-4	DIFF	BFP	*
3	Conbraco	40-200-TK		BFP	*
4	Conbraco	40-200-TKP		BFP	*
5	Conbraco	40-200-TK5		BFP	*
6	Conbraco	40-200-TKRC		BFP	*
7	Duke	75	DIFF	BFP	*
8	Duke	75B	DIFF	BFP	*
9	Duke	100	DIFF	BFP	*
10	Duke	1000	DIFF	BFP	*
11	Duke	EZ-900		BFP	*
12	Duke/Barton	226A-BFT		BFP	*
13	Duke/Barton	227A-BFT		BFP	*
14	Duke/Barton	246-BFT		BFP	*
15	Duke/Barton	247-BFT		BFP	*
16	Febco	825TK		BFP	*
17	Febco	RPTK		BFP	*
18	Febco	RPTK1		BFP	*
19	Flomatic	TK1		BFP	*
20	Hersey	Test Kit		BFP	*

Notes:

New Model

After Clicking Add a Blank test kit records will appear

- Choose a Manufacture
- Model
- Type
- Comments



Notes:

XC2 Software Knowledge Base

How To Create Boilerplates

KB Asset ID: 2048

Page describes what Boilerplates do and how to create them in XC2

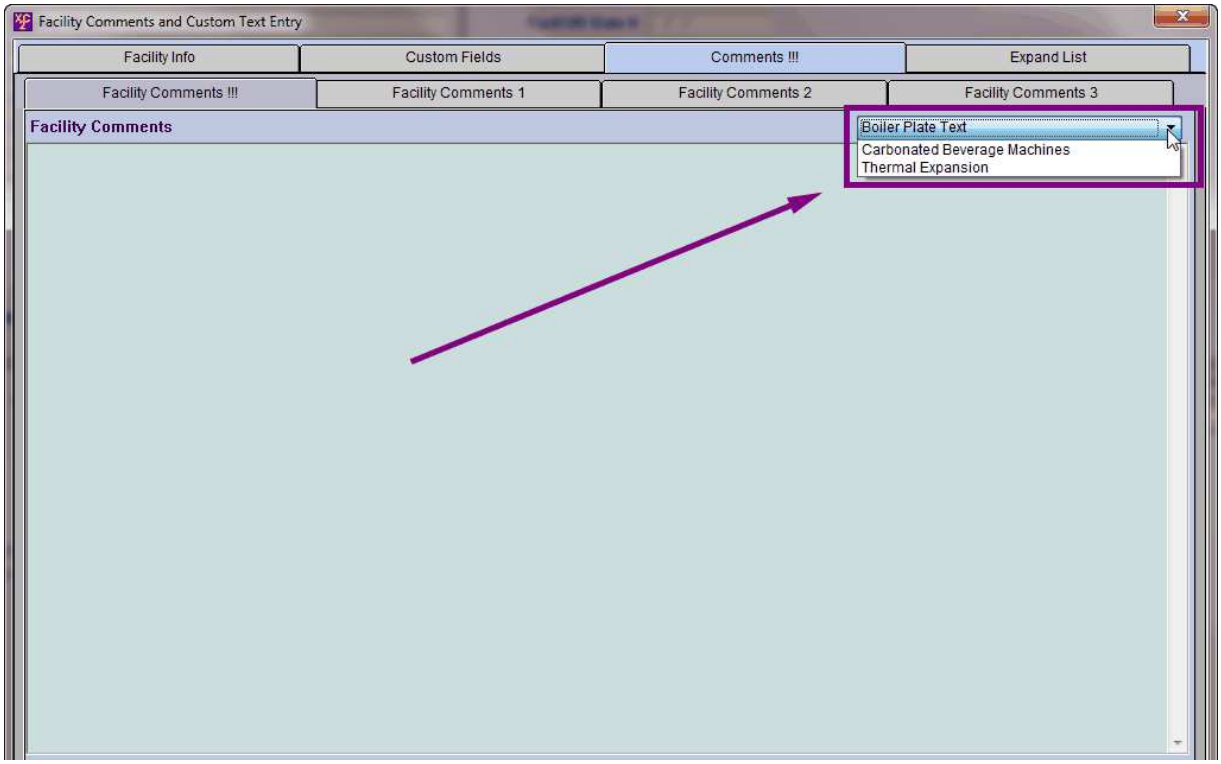
What is a Boilerplate?

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

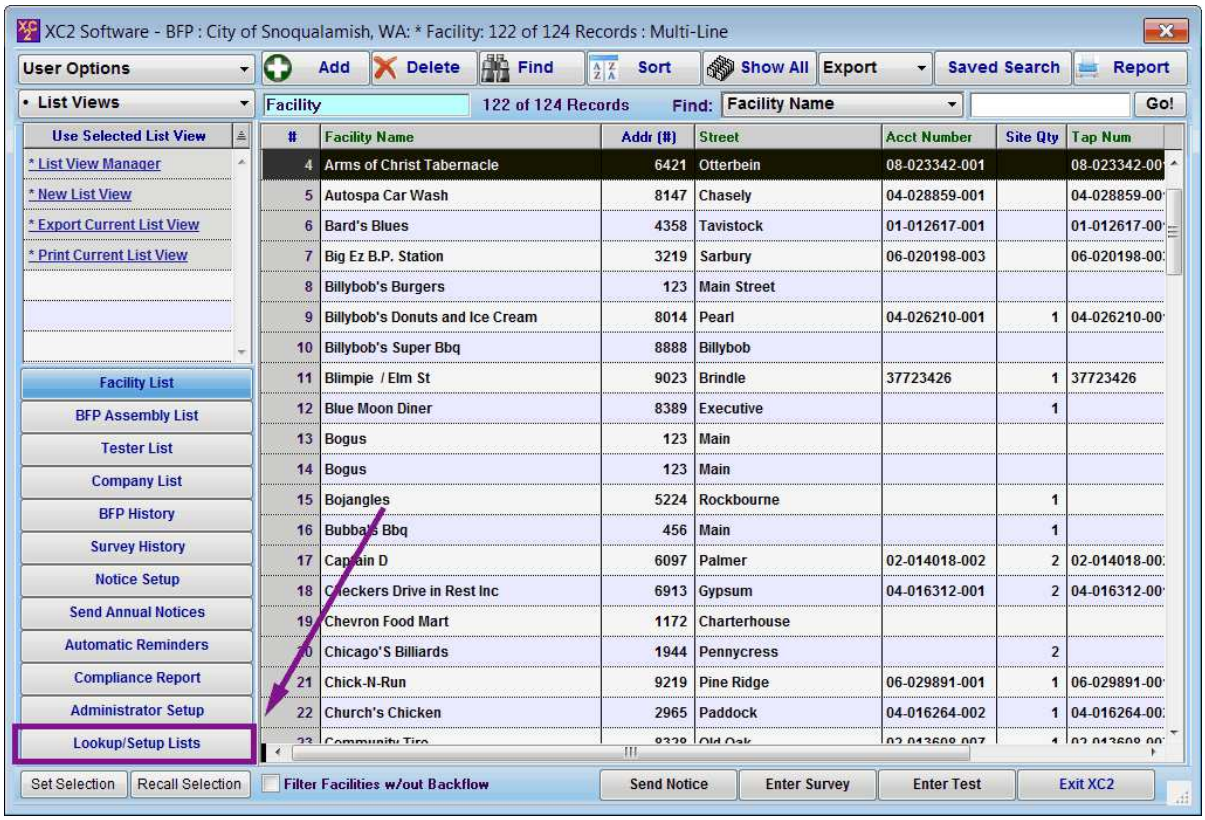


How to Create a Boilerplate

You can create Boilerplates within the View Setup Lists area in XC2

From the Main Screen

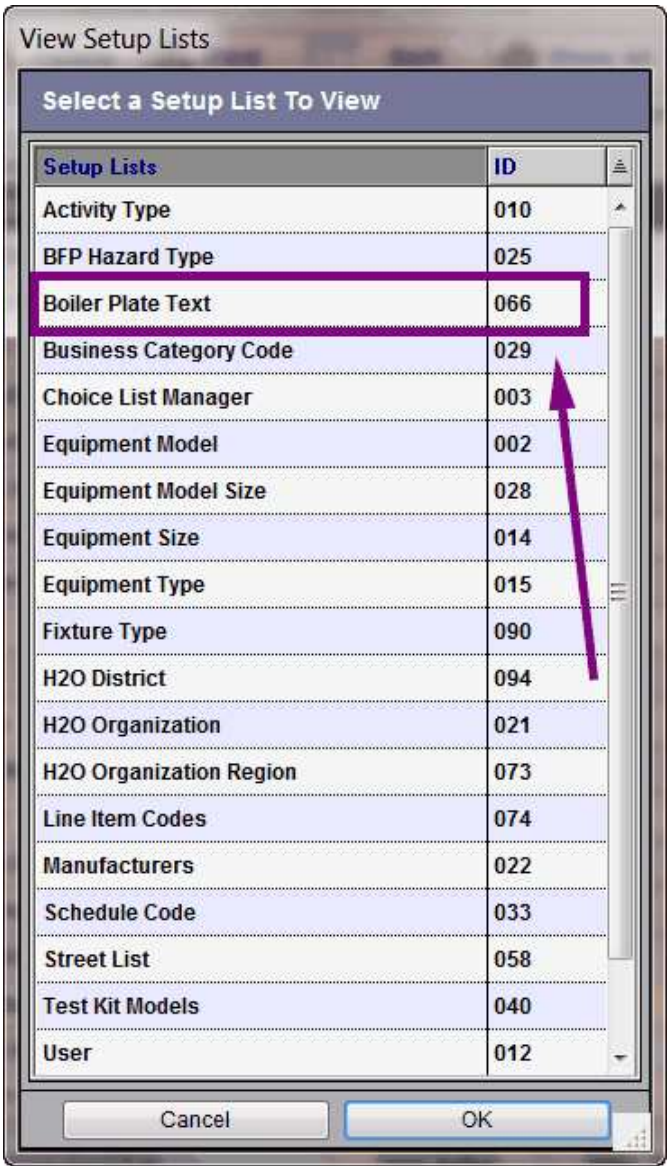
- Click on Lookup/Setup Lists



Notes:

Selecting Boilerplate Entry

Select Boilerplate Text

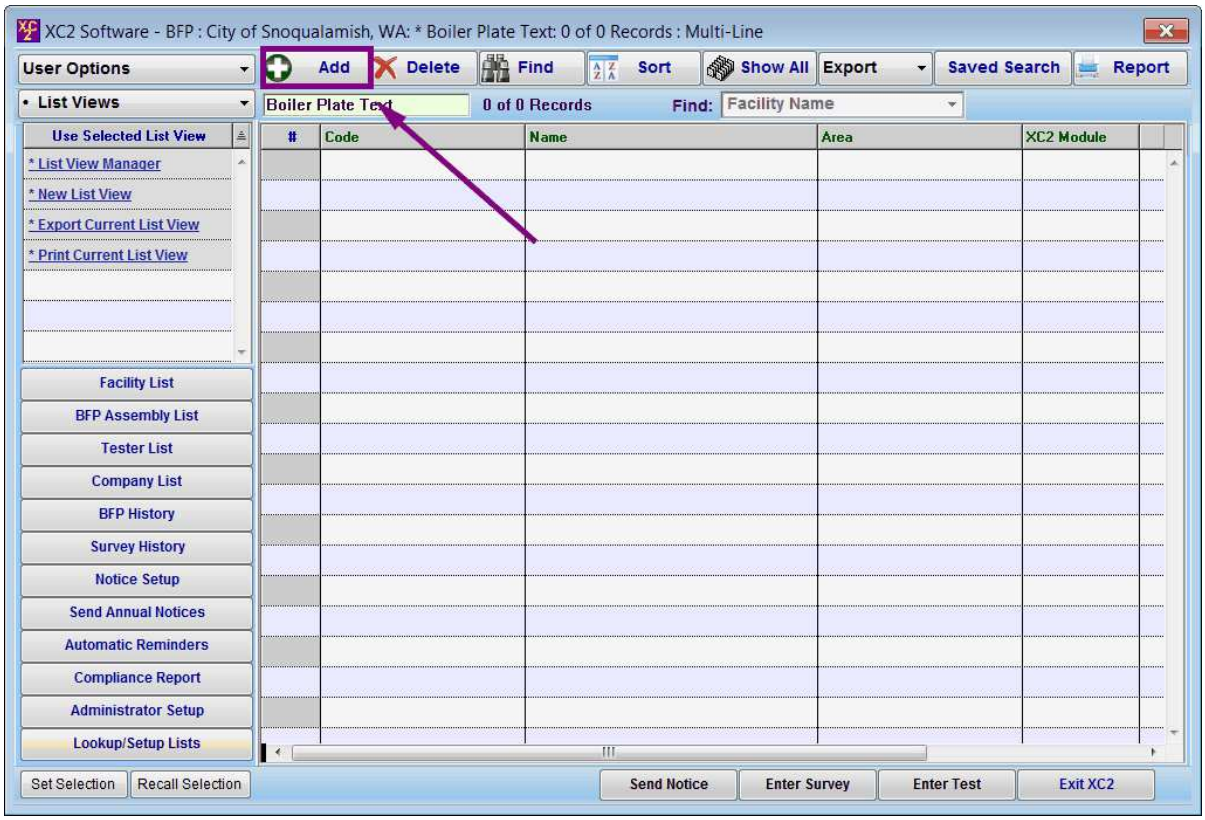


Notes:

Adding New Boilerplate

From the Boilerplate Table

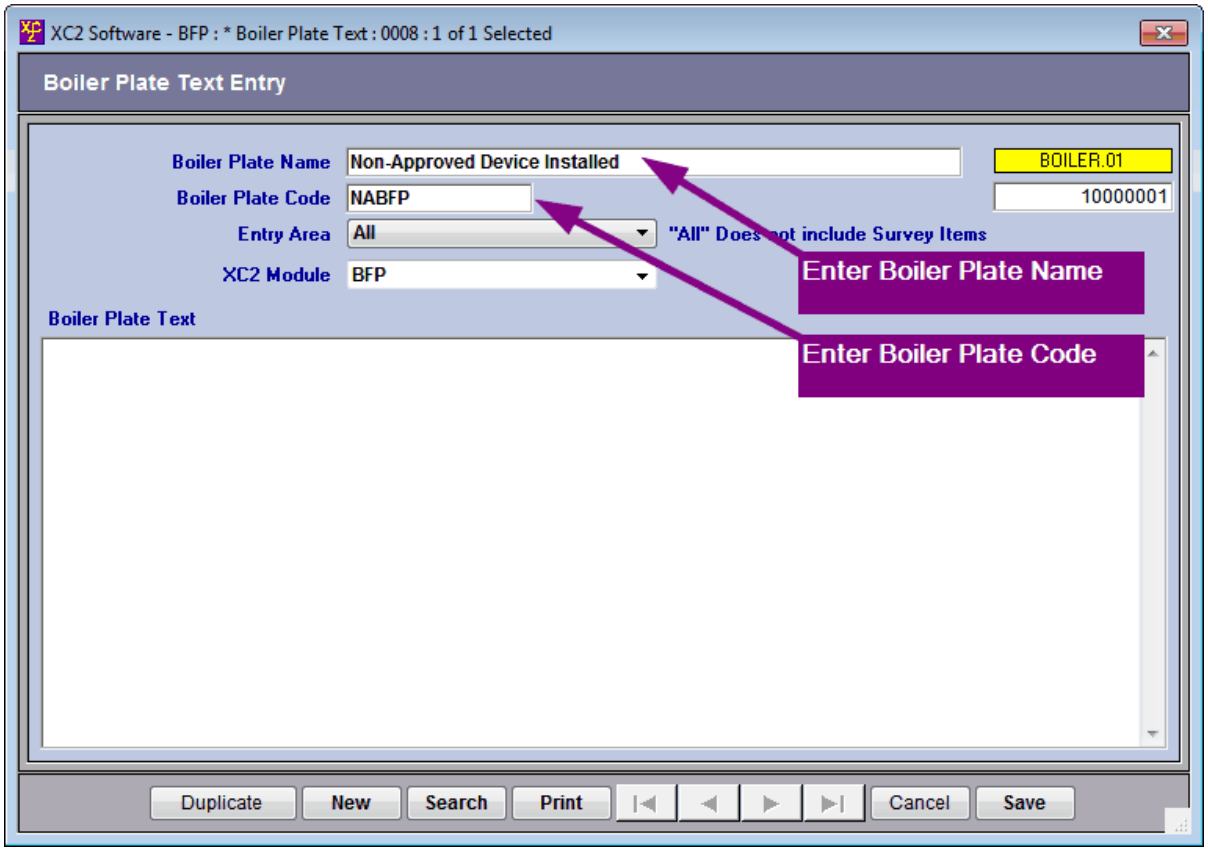
- Click the Add button



Notes:

Naming your Boilerplate

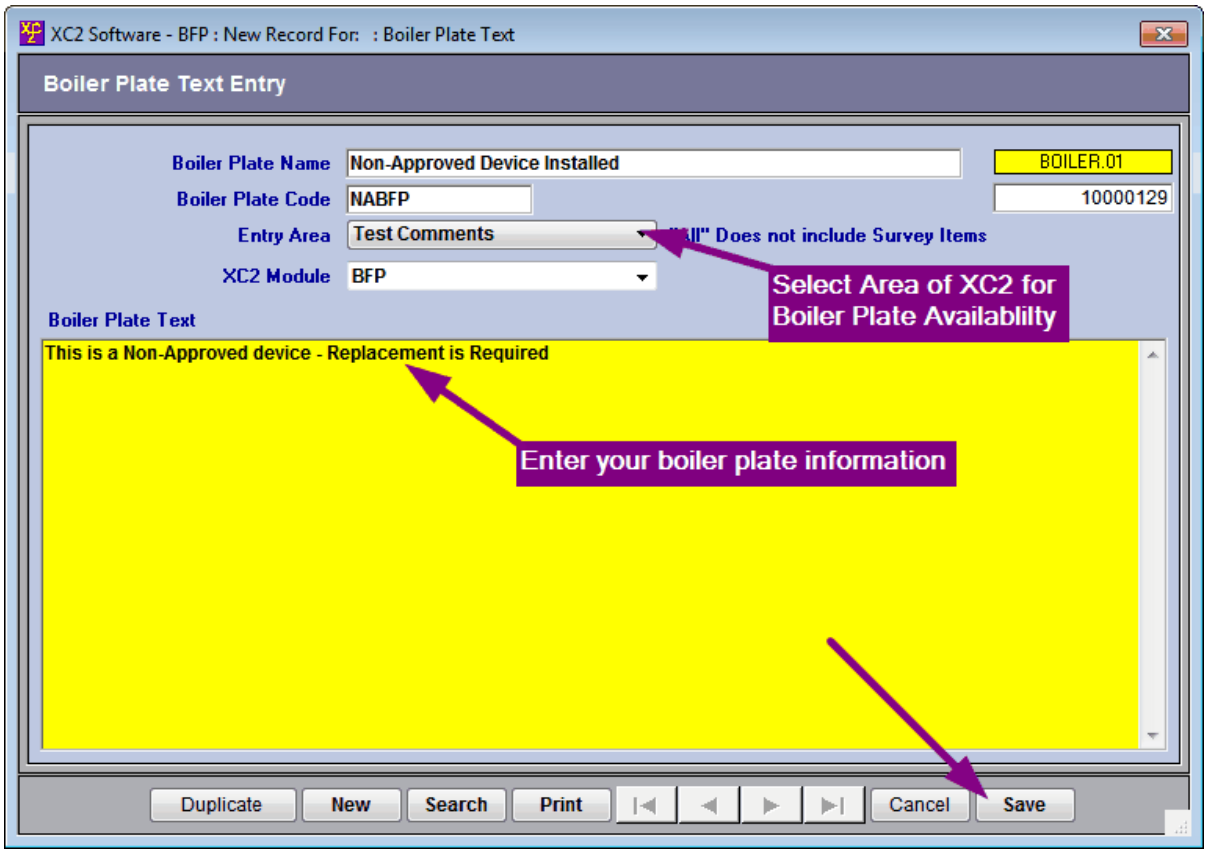
- Give your Boilerplate a descriptive name and code



Notes:

Enter Your Boilerplate Text

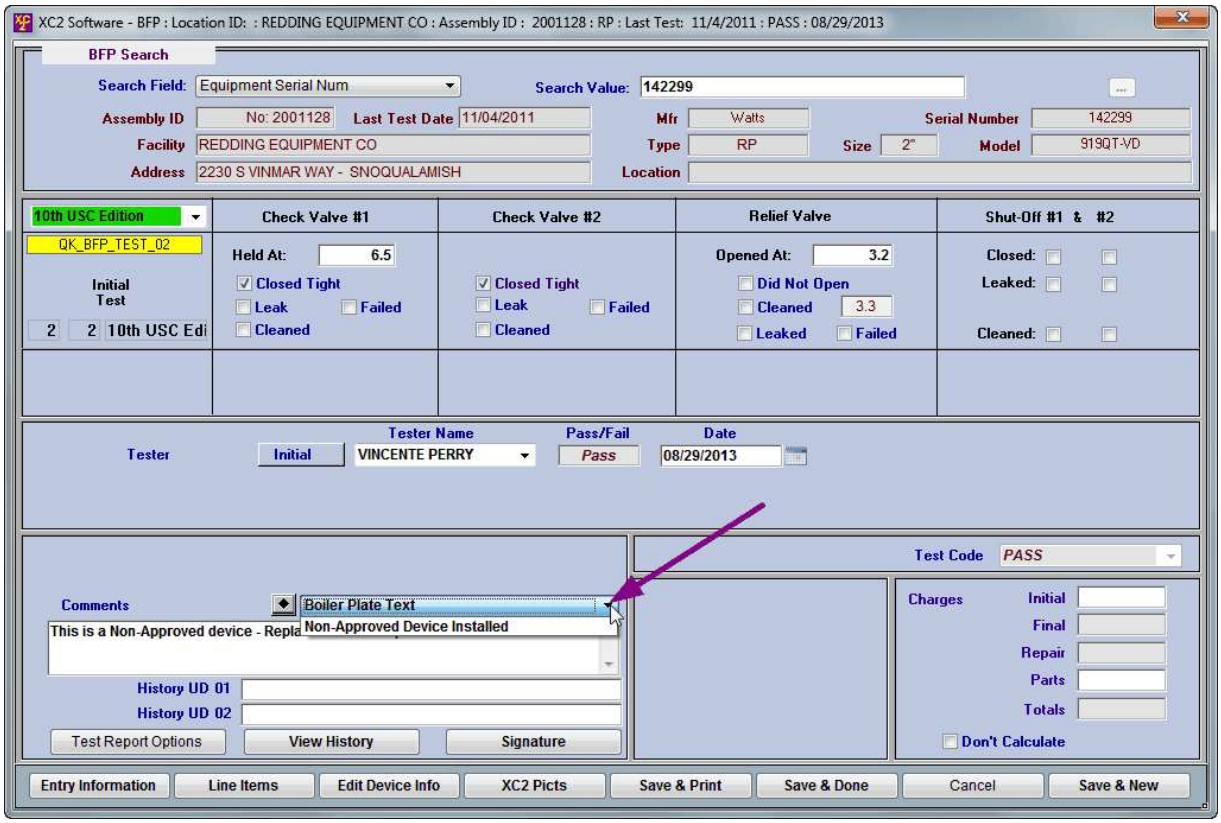
- Select the area of XC2 where you want the Boilerplate to be available
- Enter your Boilerplate text
- Click Save when finished



Notes:

Boilerplate Available

Your new Boilerplate is now available for selection in the area of XC2 specified



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

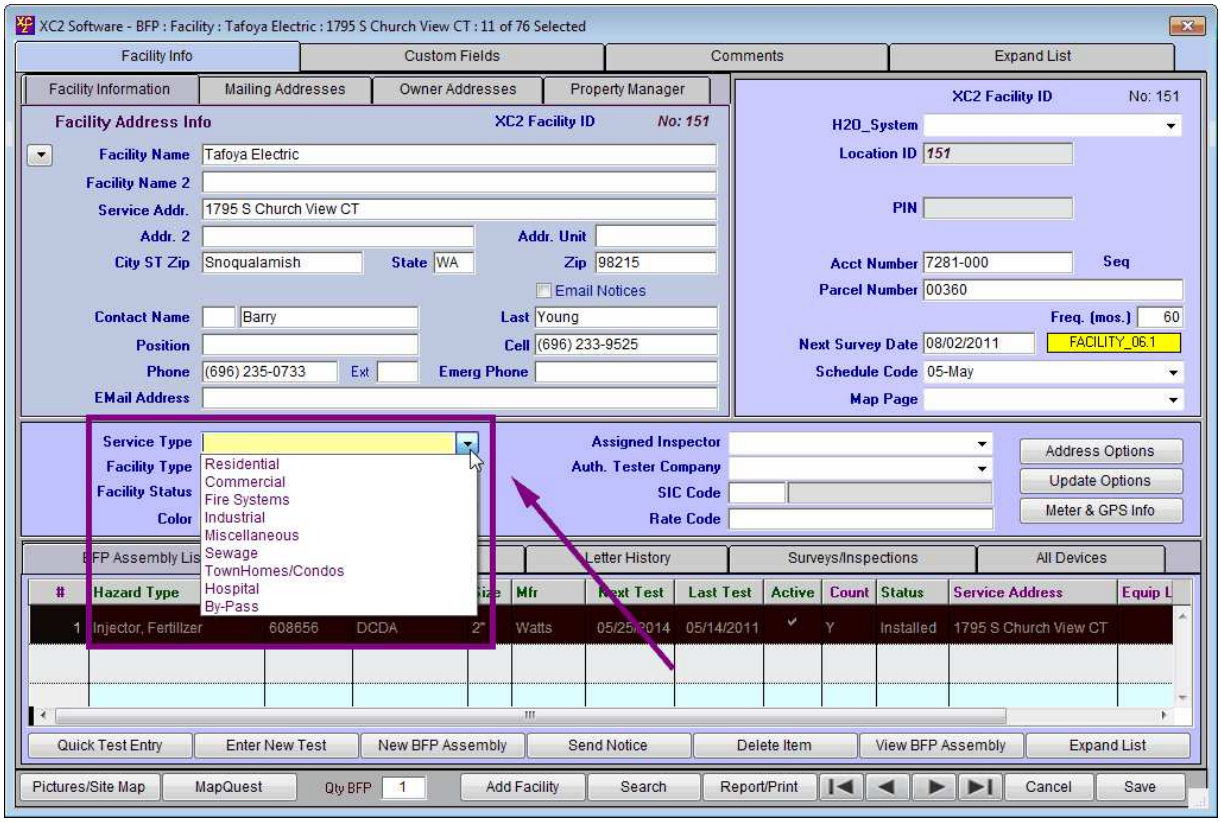
KB Asset ID: 2661

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.

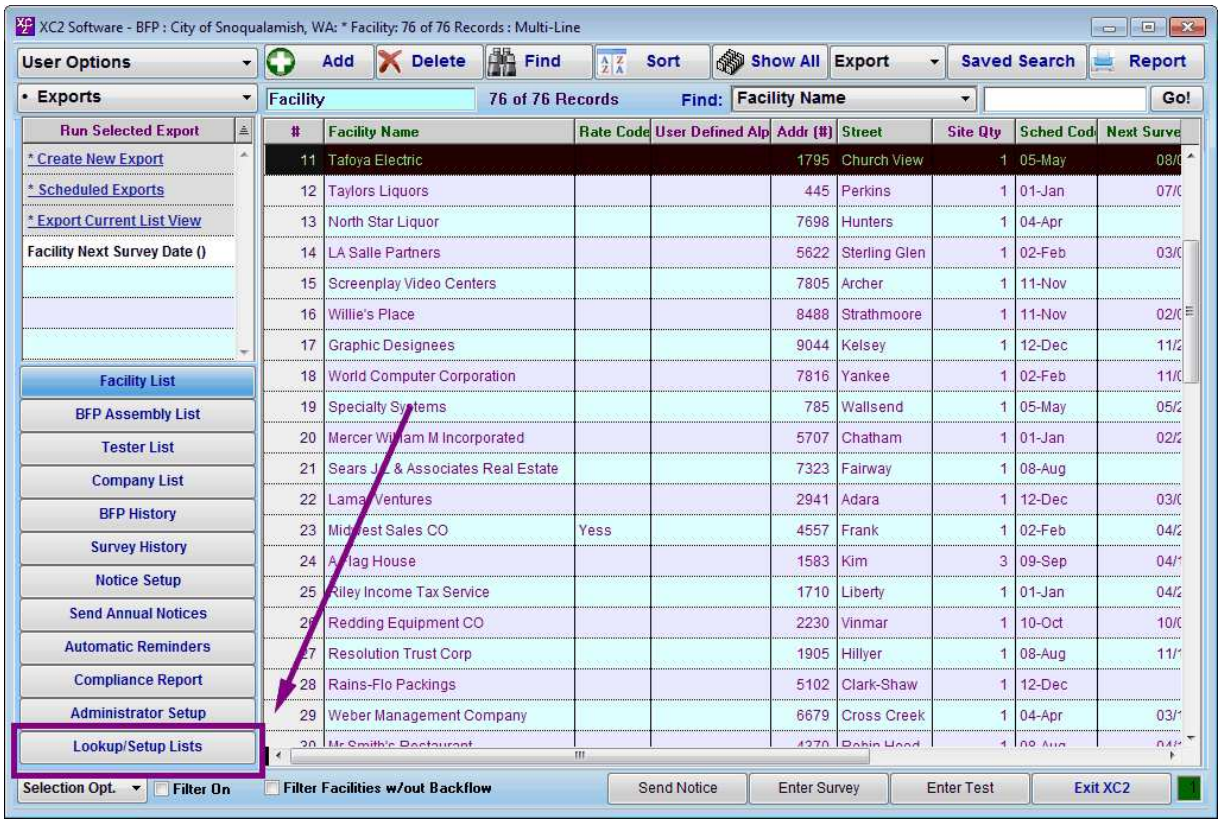
Choice list Example: Below I am showing the Service Type Pull-down Menu in a Facility Record. Service Type is a Choice List that can be Rearranged or Modified in the Choice List Manager.



Notes:

Lookup/Setup Lists

Click Lookup/Setup Lists



#	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/(
12	Taylors Liquors			445	Perkins	1	01-Jan	07/(
13	North Star Liquor			7698	Hunters	1	04-Apr	
14	LA Salle Partners			5622	Sterling Glen	1	02-Feb	03/(
15	Screenplay Video Centers			7805	Archer	1	11-Nov	
16	Willie's Place			8488	Strathmoore	1	11-Nov	02/(
17	Graphic Designees			9044	Kelsey	1	12-Dec	11/2
18	World Computer Corporation			7816	Yankee	1	02-Feb	11/(
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 & Associates Real Estate			7323	Fairway	1	08-Aug	
22	Lama Ventures			2941	Adara	1	12-Dec	03/(
23	Midwest Sales CO	Yess		4557	Frank	1	02-Feb	04/2
24	A Flag House			1583	Kim	3	09-Sep	04/1
25	Riley Income Tax Service			1710	Liberty	1	01-Jan	04/2
26	Redding Equipment CO			2230	Vinmar	1	10-Oct	10/(
27	Resolution Trust Corp			1905	Hillyer	1	08-Aug	11/1
28	Rains-Flo Packings			5102	Clark-Shaw	1	12-Dec	
29	Weber Management Company			6679	Cross Creek	1	04-Apr	03/1
30	Mr Smith's Restaurant			4370	Robin Hood	1	08-Aug	04/(

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 containes the items currently available in the Choice list

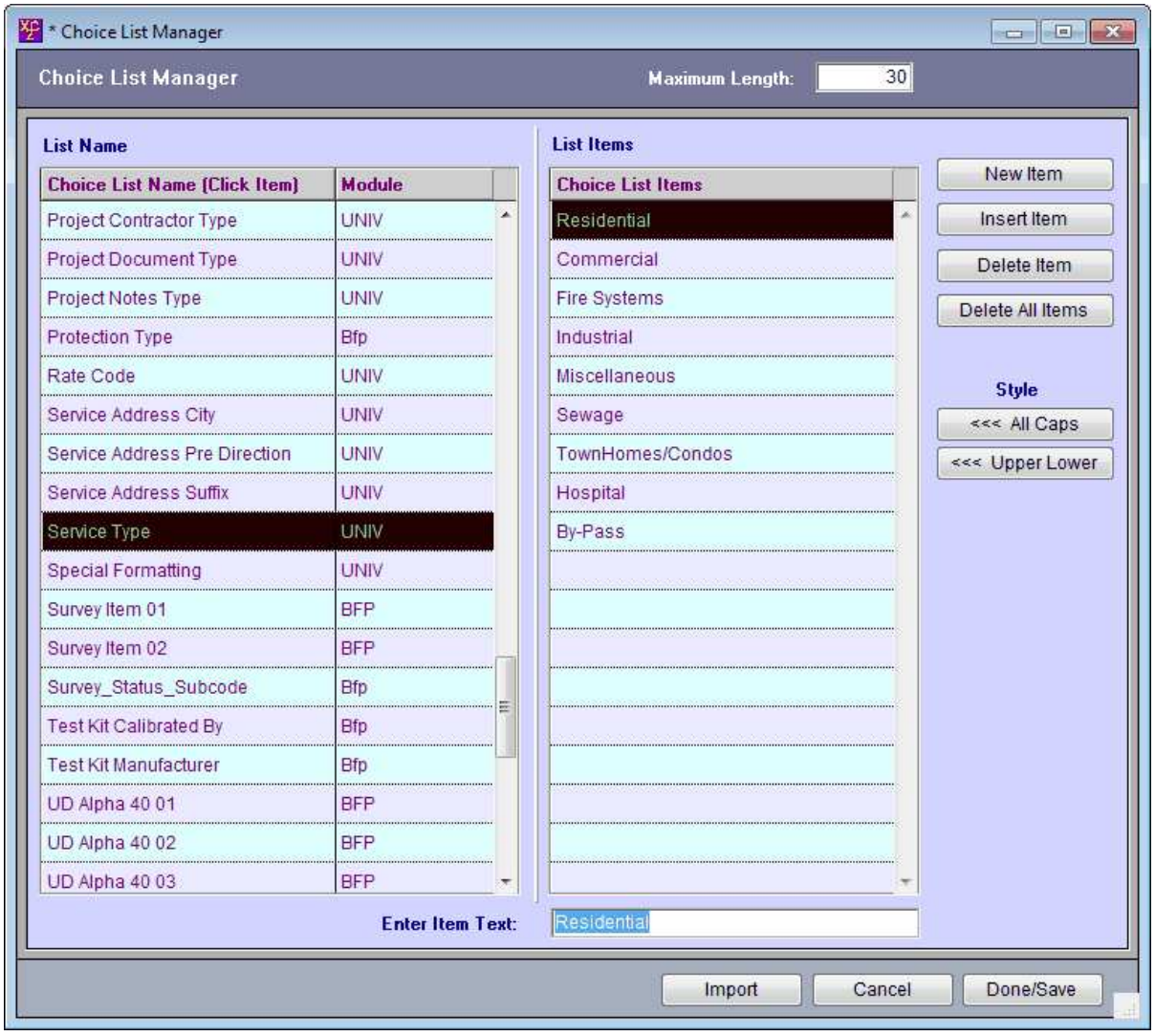
Here I am Selecting Service Type.

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 includs

- Equipment Status
- Facility Status
- User Defined Fields



Notes:

XC2 Software Knowledge Base

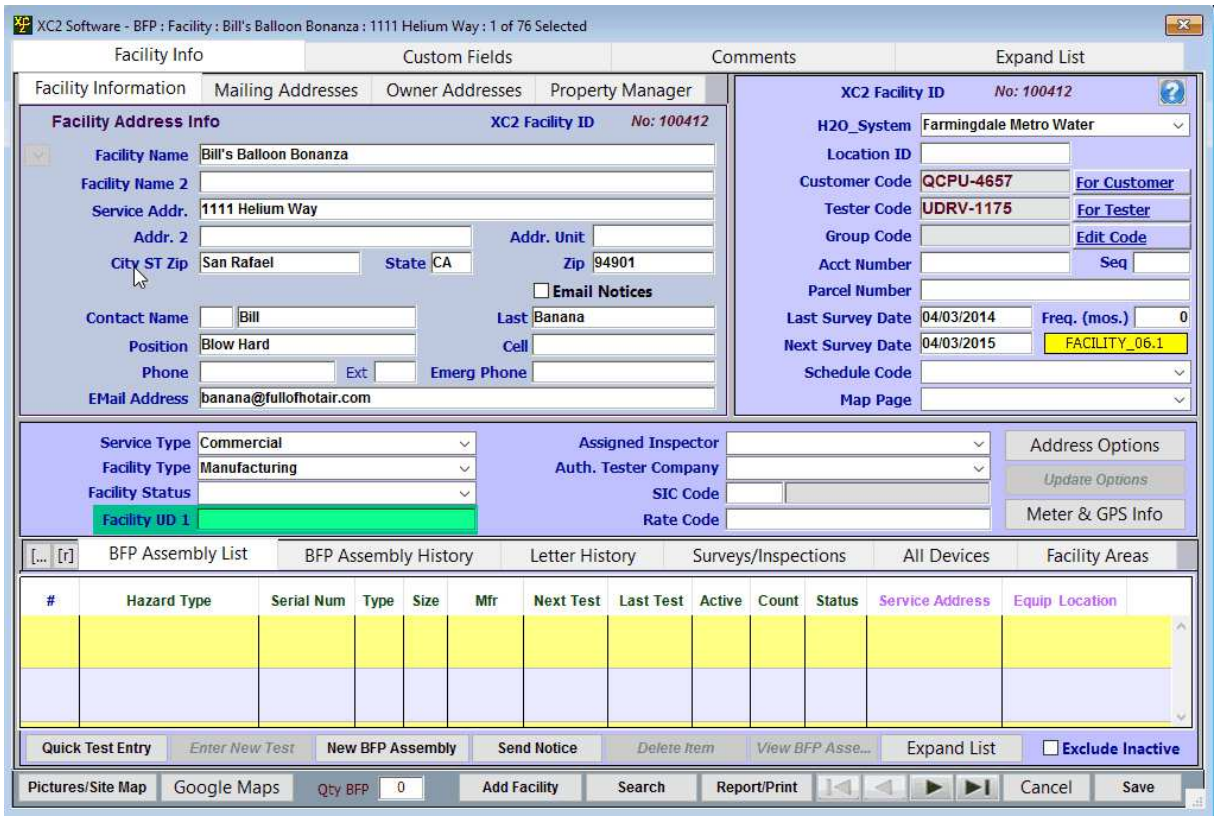
Choice List - Free Form or Pull Down Entry

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.

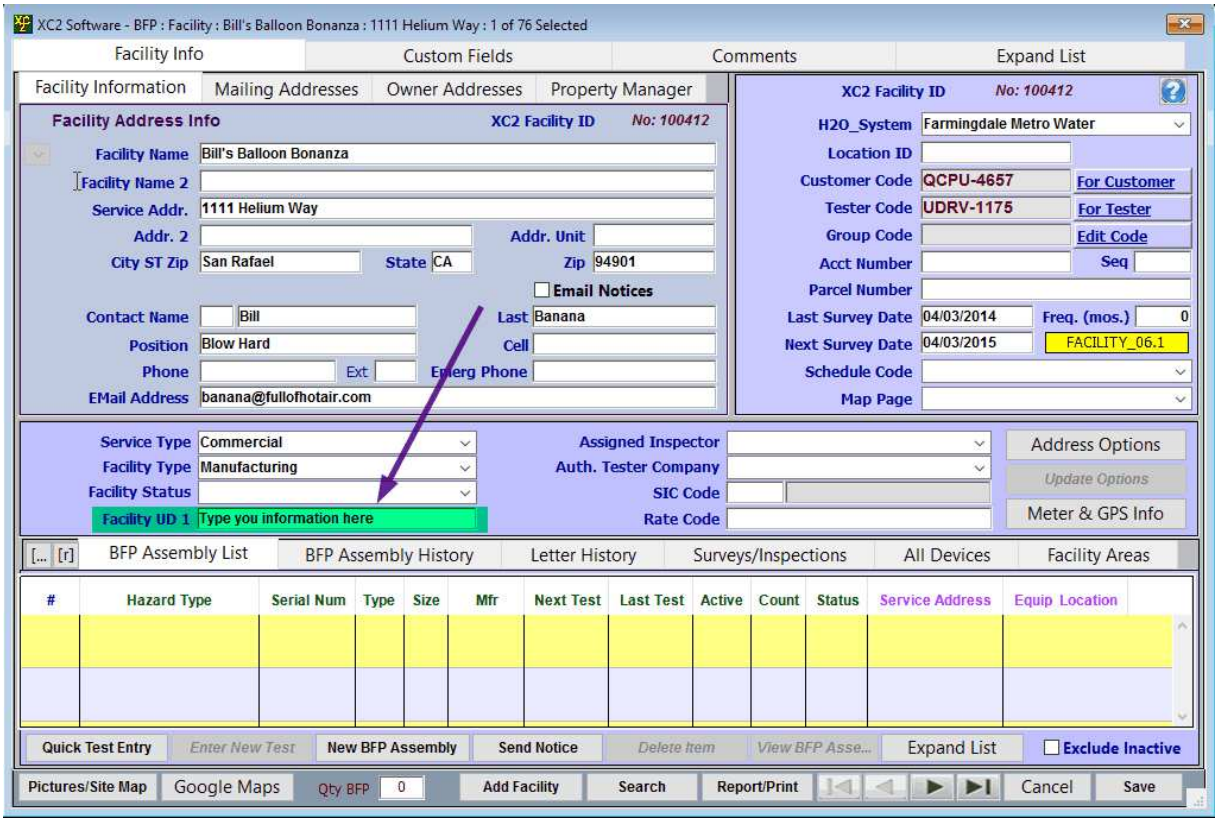


Notes:

Free Form Data Entry

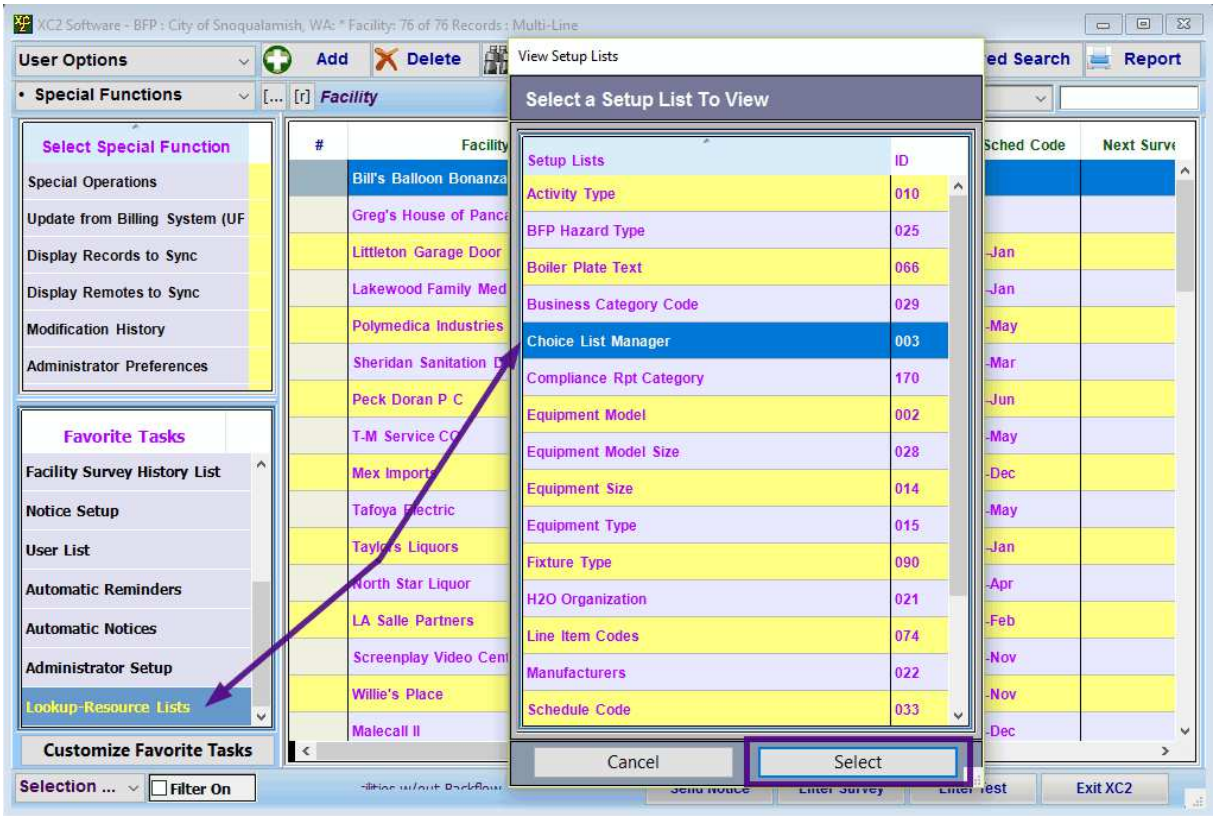
By default, this field is setup to be used as Free Form data entry.

Simply meaning - You type in the information you wish to enter.



Notes:

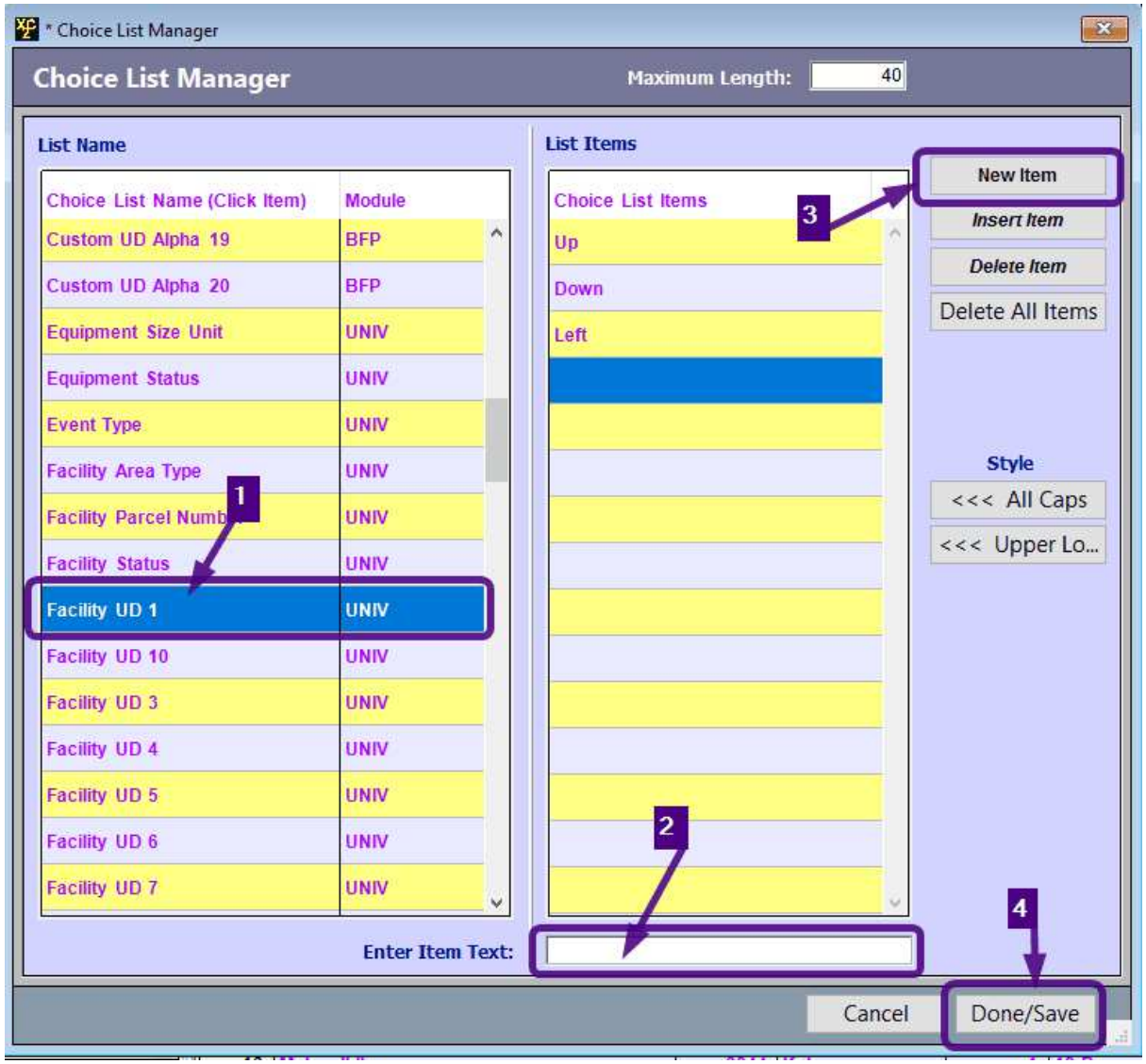
Open The Choice List Editor



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



Notes:

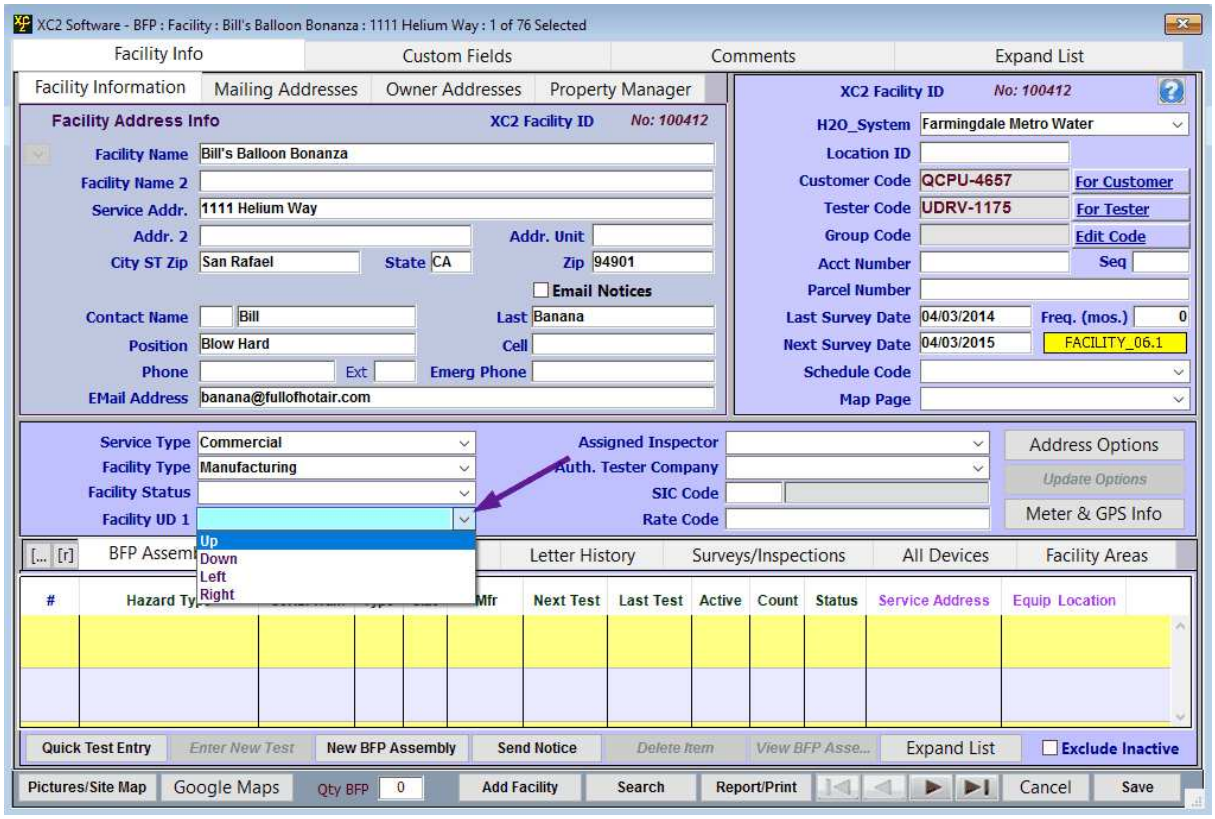
Pull Down List Populated

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

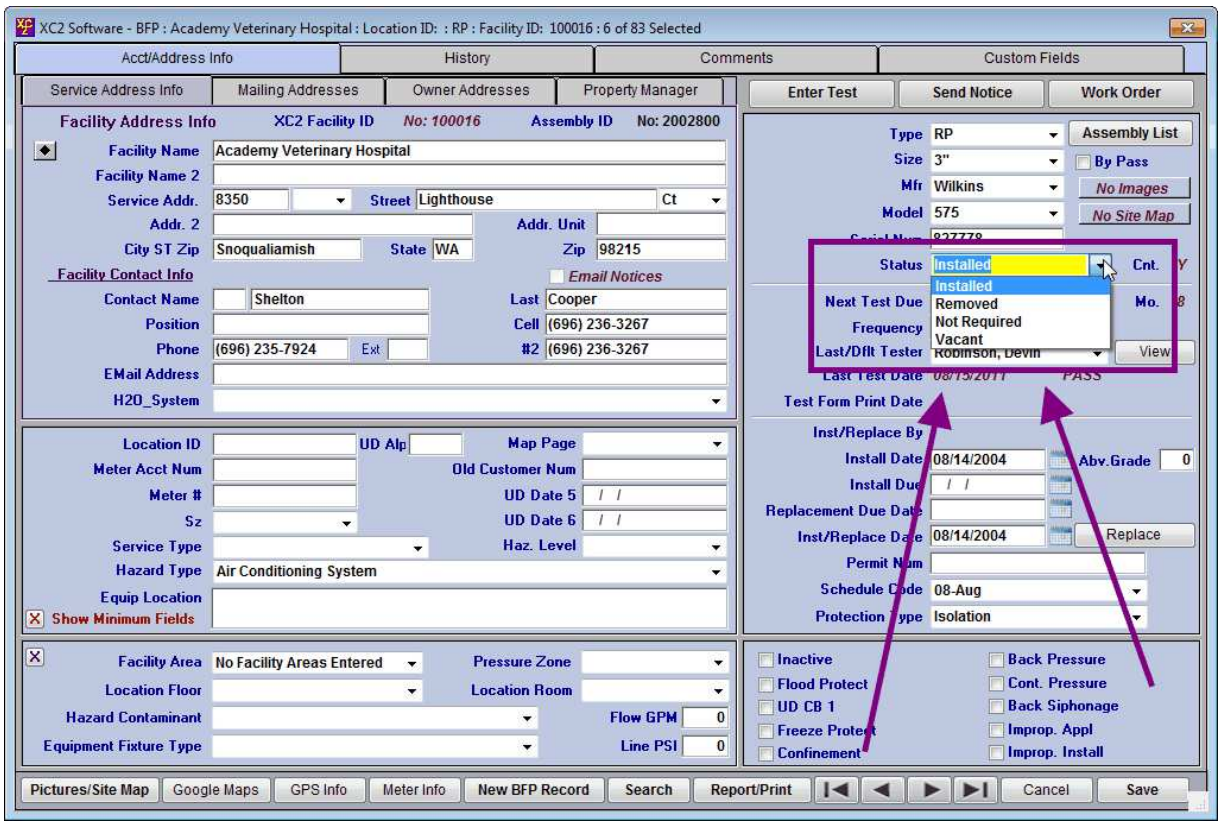
Equipment Status

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.



Notes:

Equipment Status Determins "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.

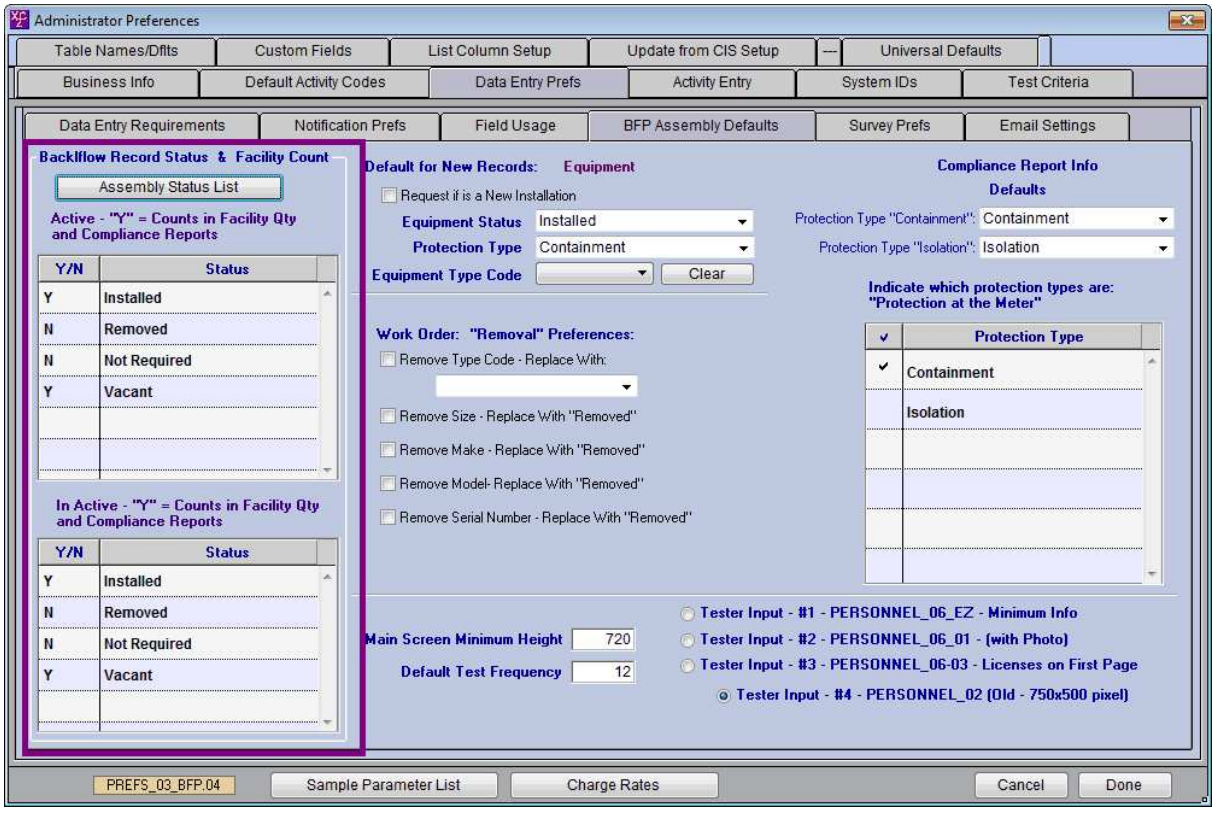
Device Types that have Y next to them "Count"

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

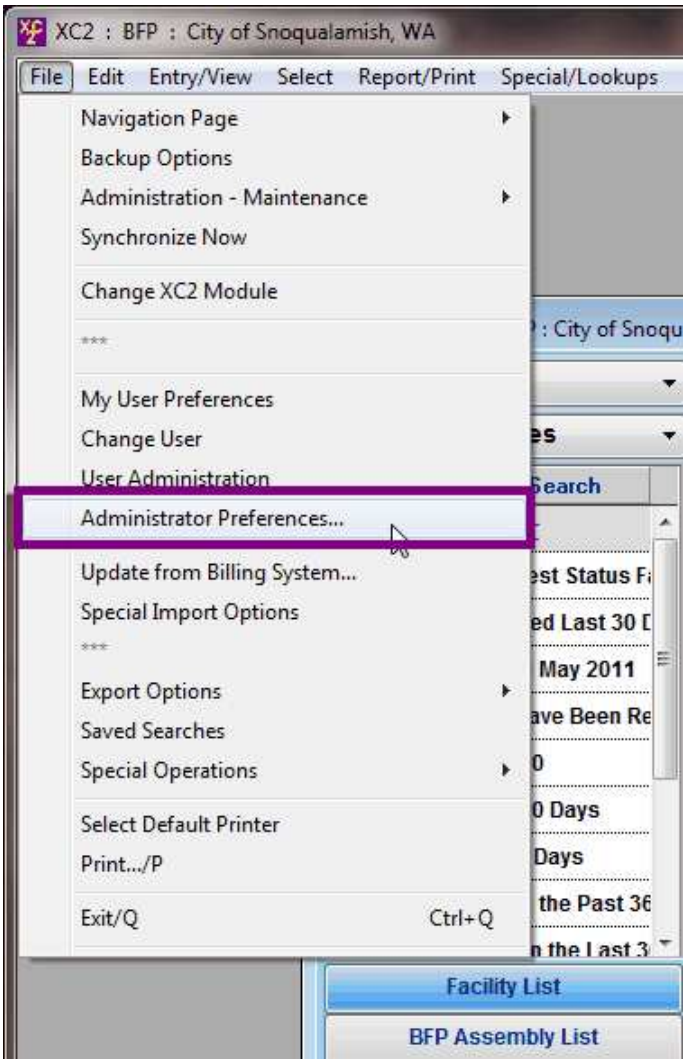


Notes:

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:

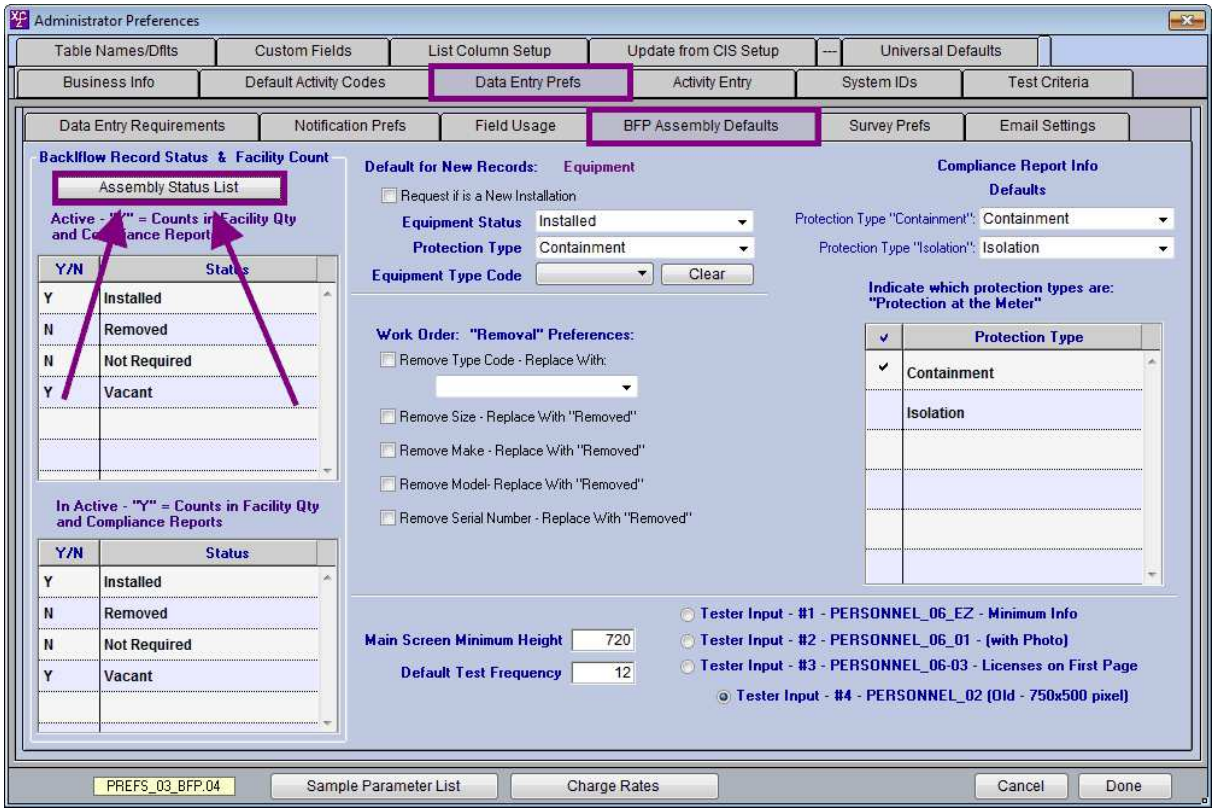
To Add or Modify existing Available Equipment Status Types

In Administrator Preferences,

Click

- Data Entry Preferences Tab
- BFP Assembly Defaults Tab

Click on Assembly Status List

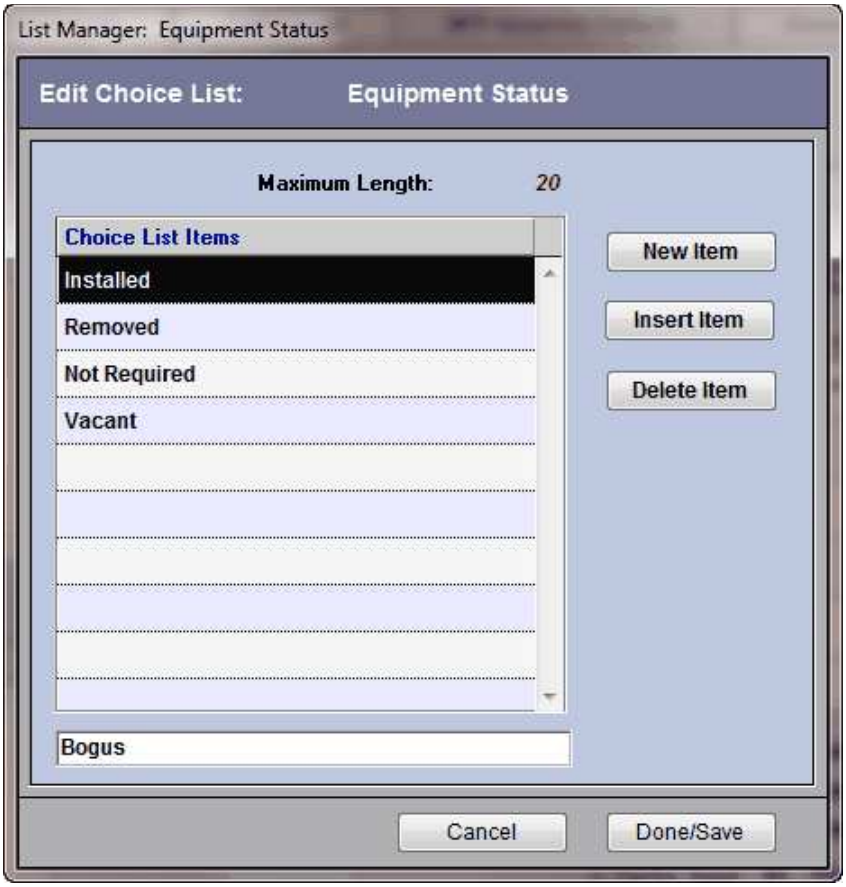


Notes:

Make a Change

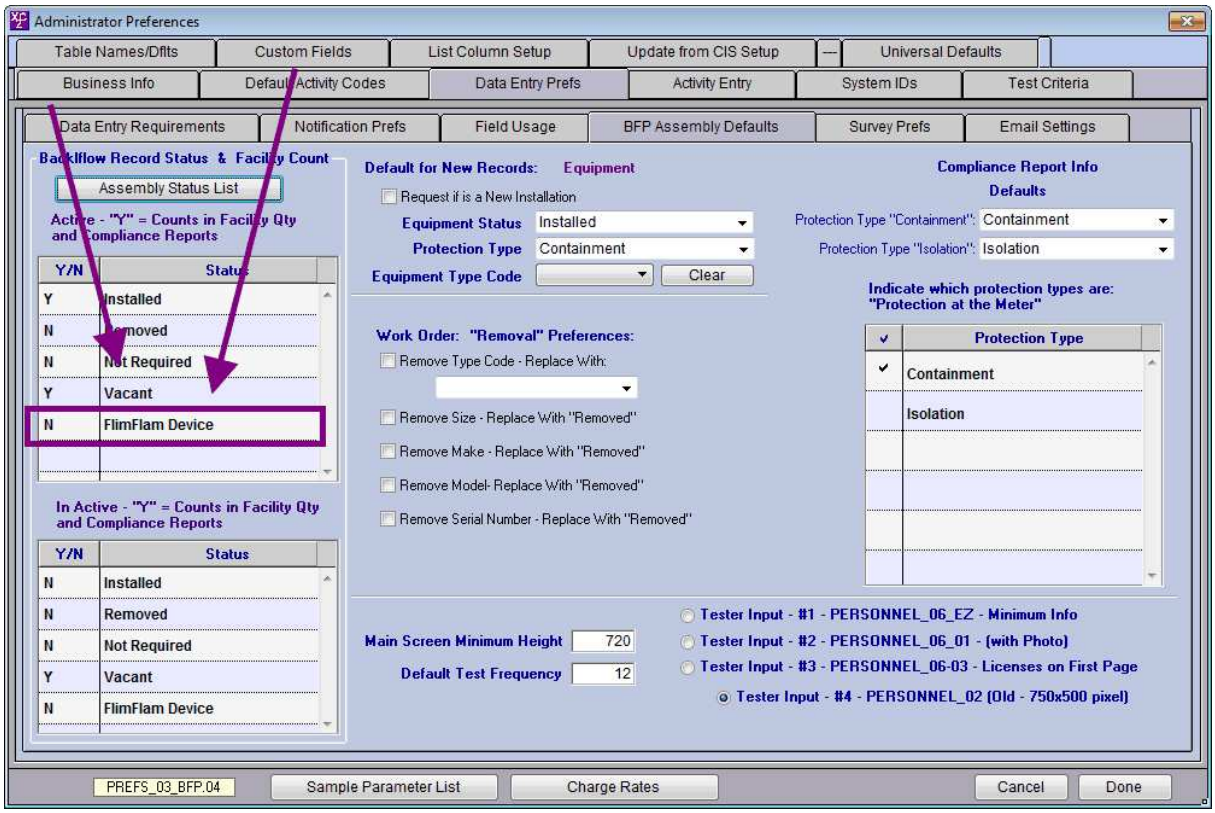
Enter a New Equipment Status or change a old one.

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

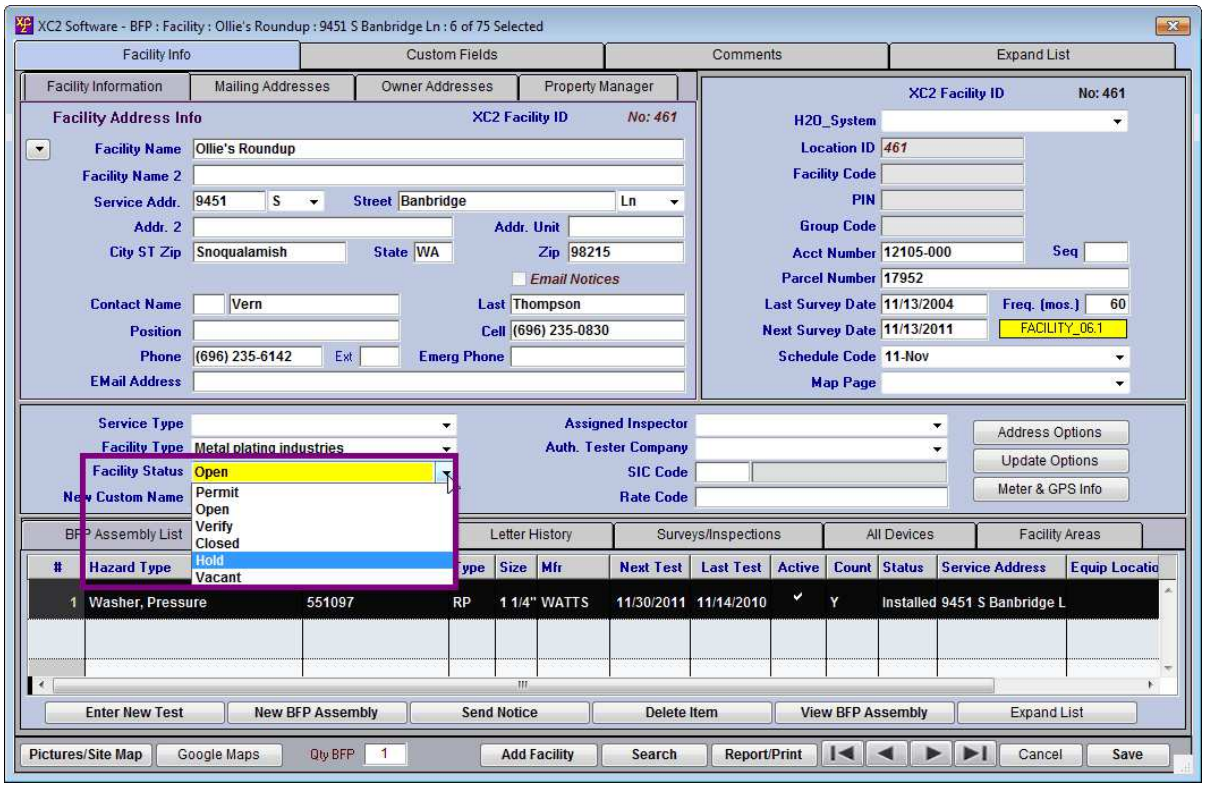
Facility Status

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 a indicator of its current state.

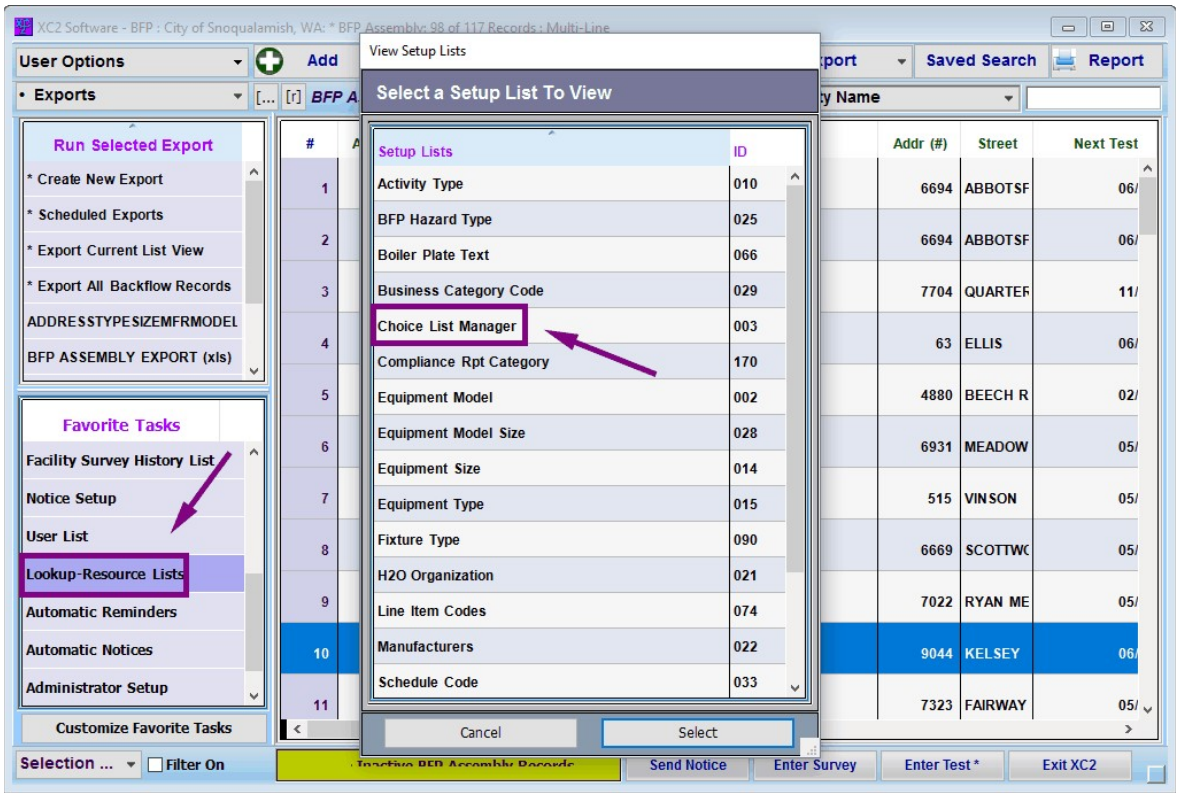


Notes:

Choice List Manager

Click Lookup/Setup Lists

Select Choice List Manager

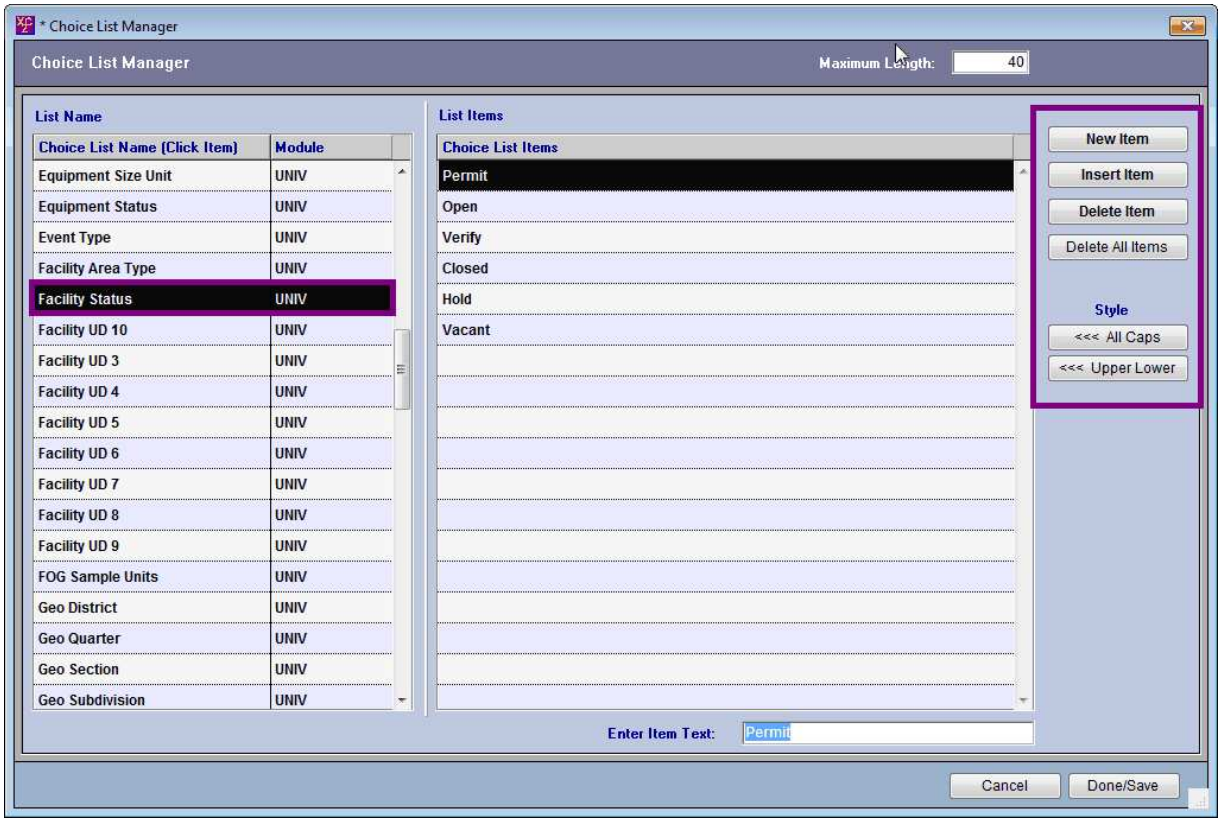


Notes:

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

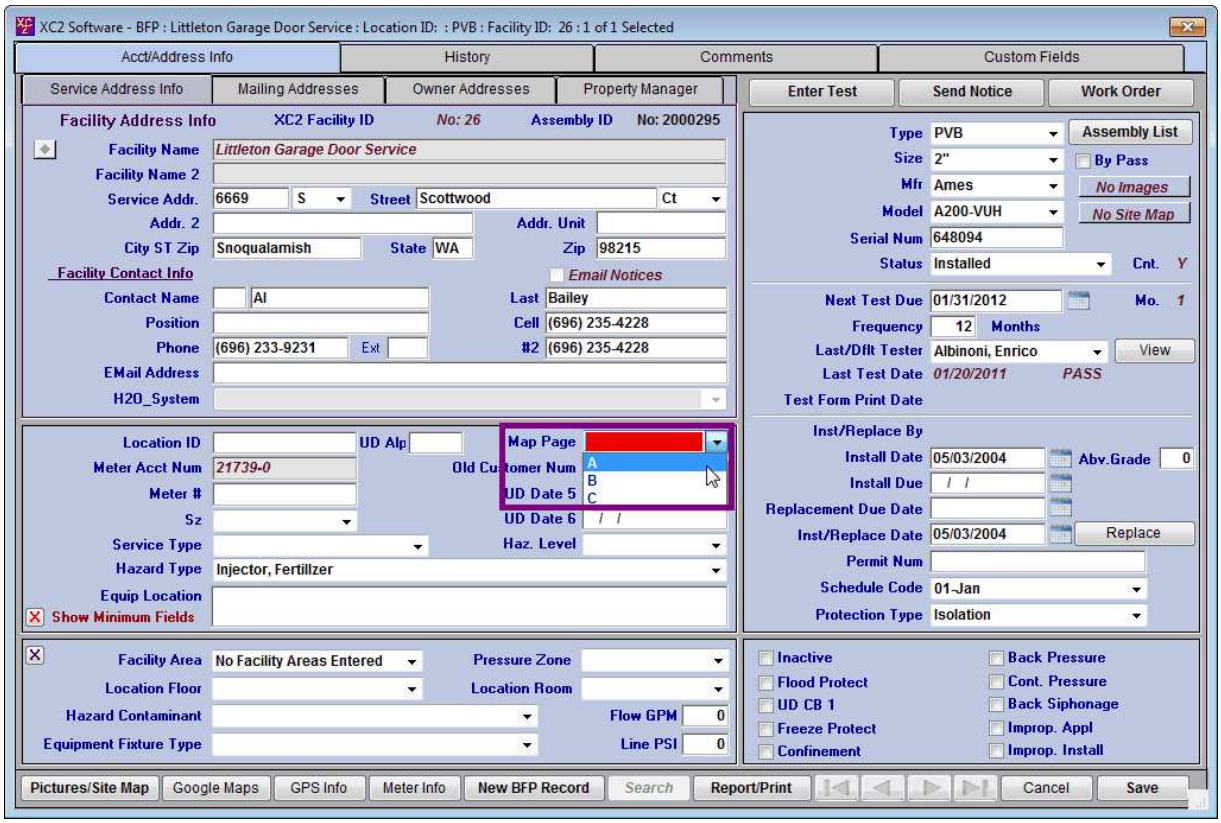
KB Asset ID: 2058

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:

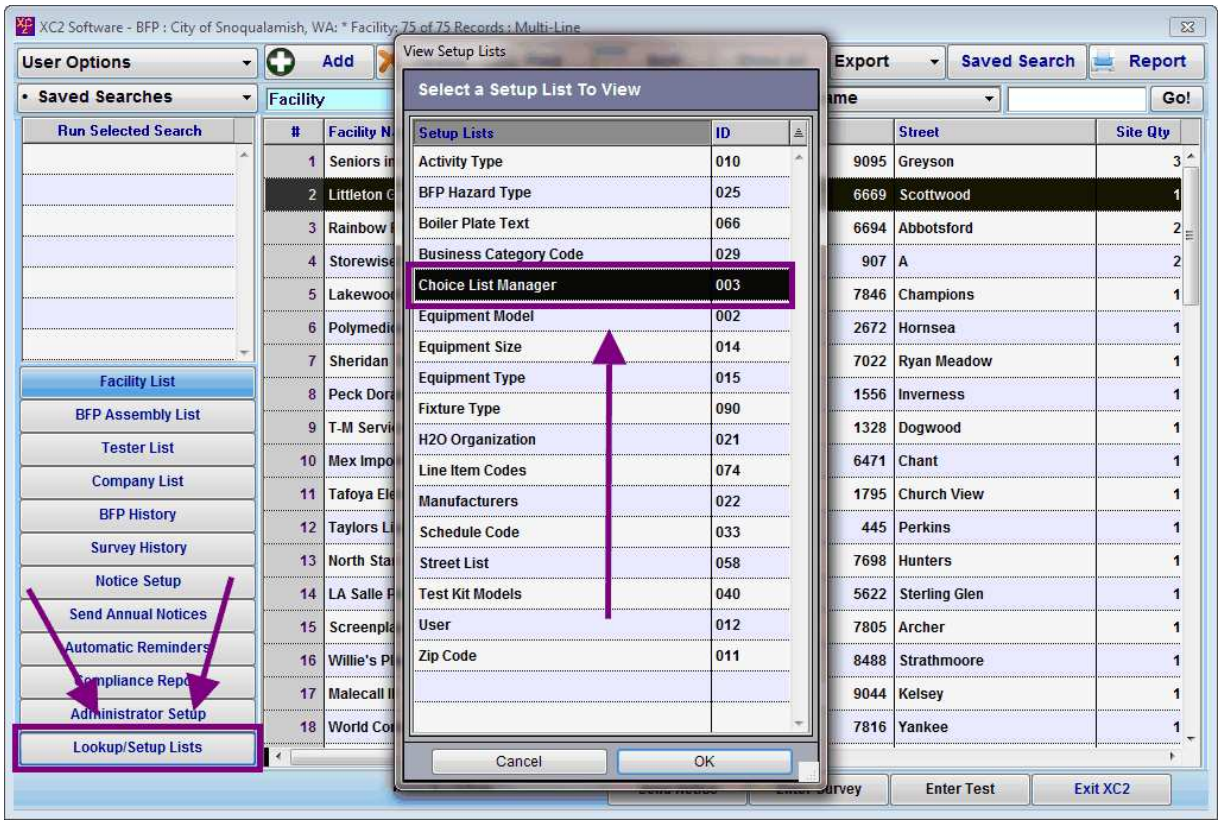
Choice List Manager

Select

Lookup/Select List

Double click on

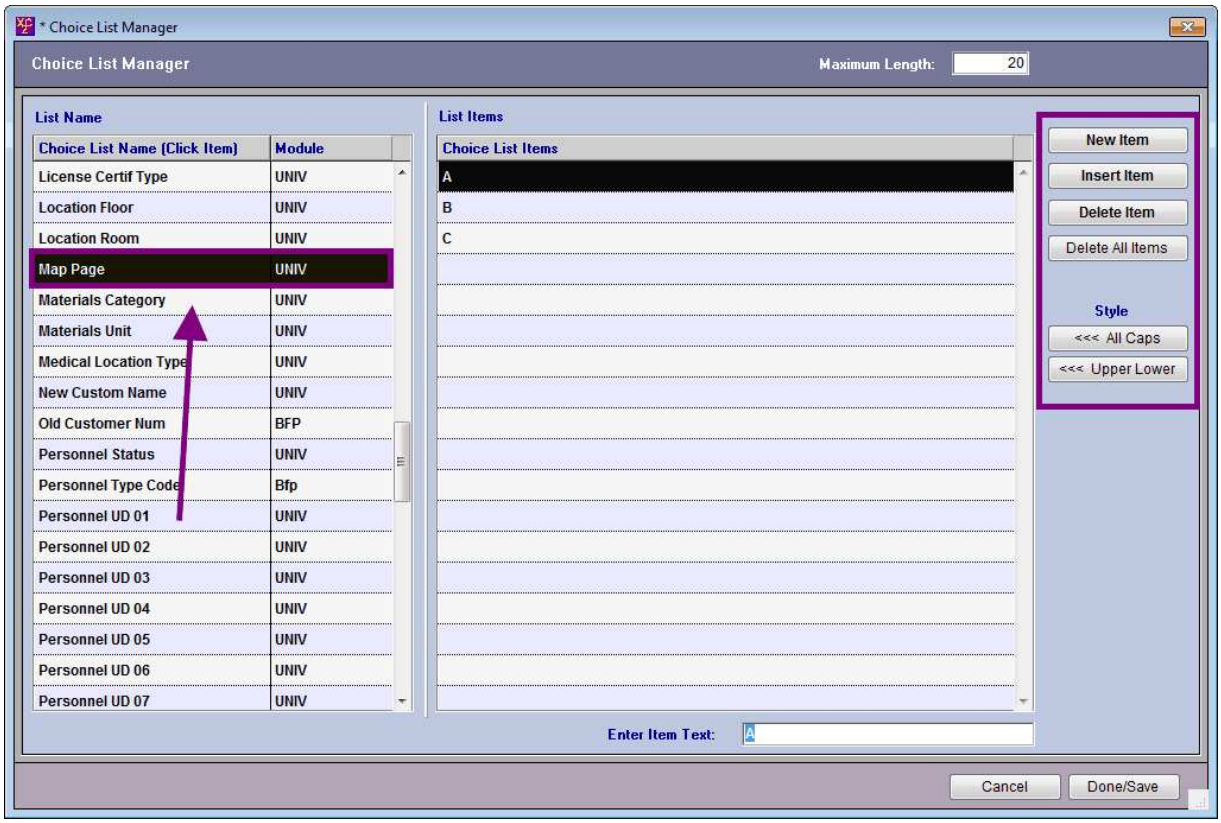
Choice List Manager



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 Personel Status Fields?

Tester Personel Status fields are located in the tester record.

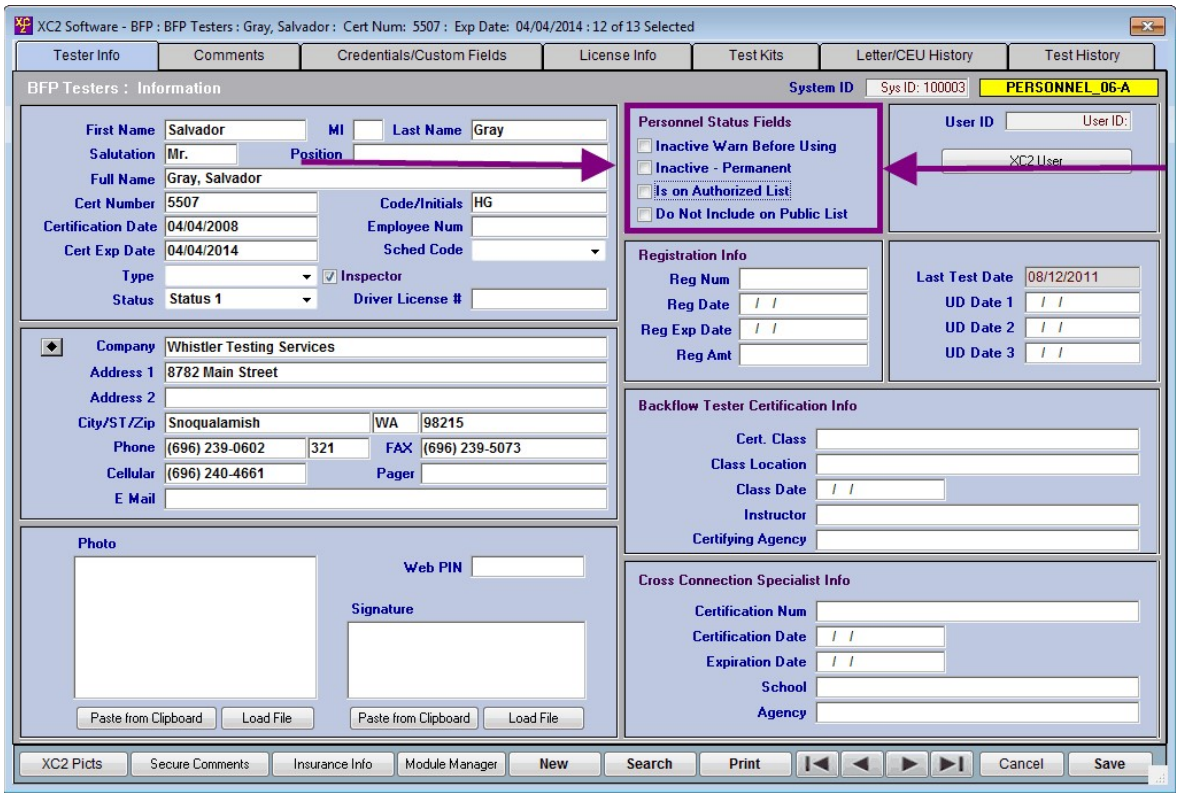
There are Four Checkboxes that may be used

1) Inactive - Warn Before Use

2) Inactive - Permanent

3) Is on Authorized List

4) Do not Include on Public List



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

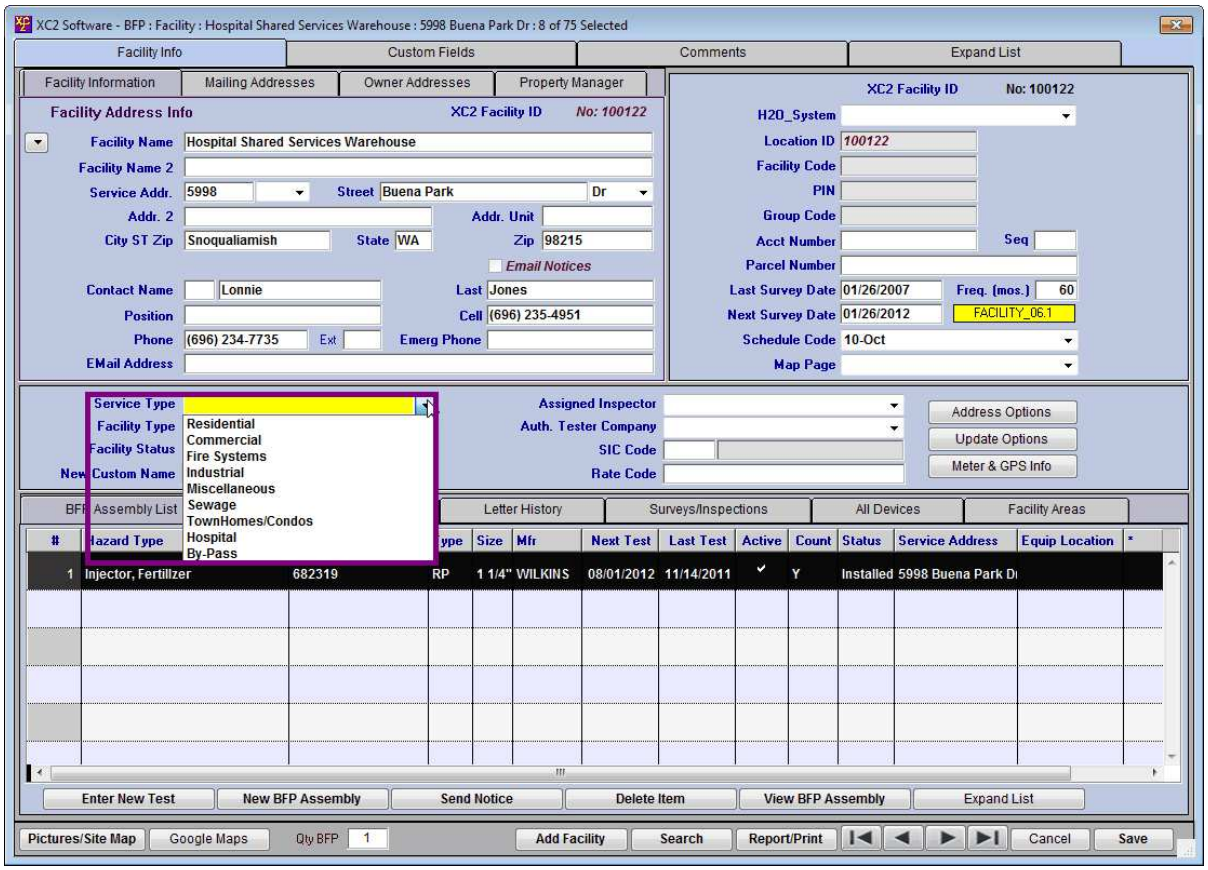
Choosing and Editing Service Types

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.

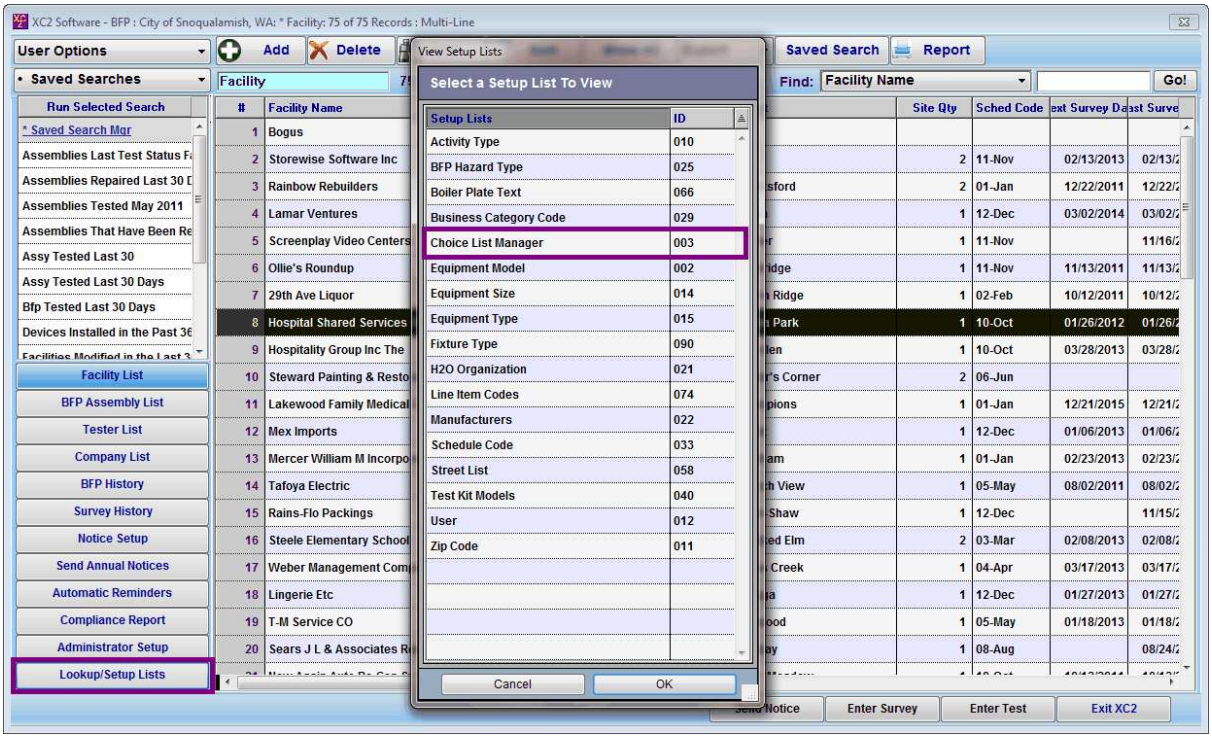


Notes:

Editing Service Types

Click Lookup/Setup Lists

Select Choice List Manager

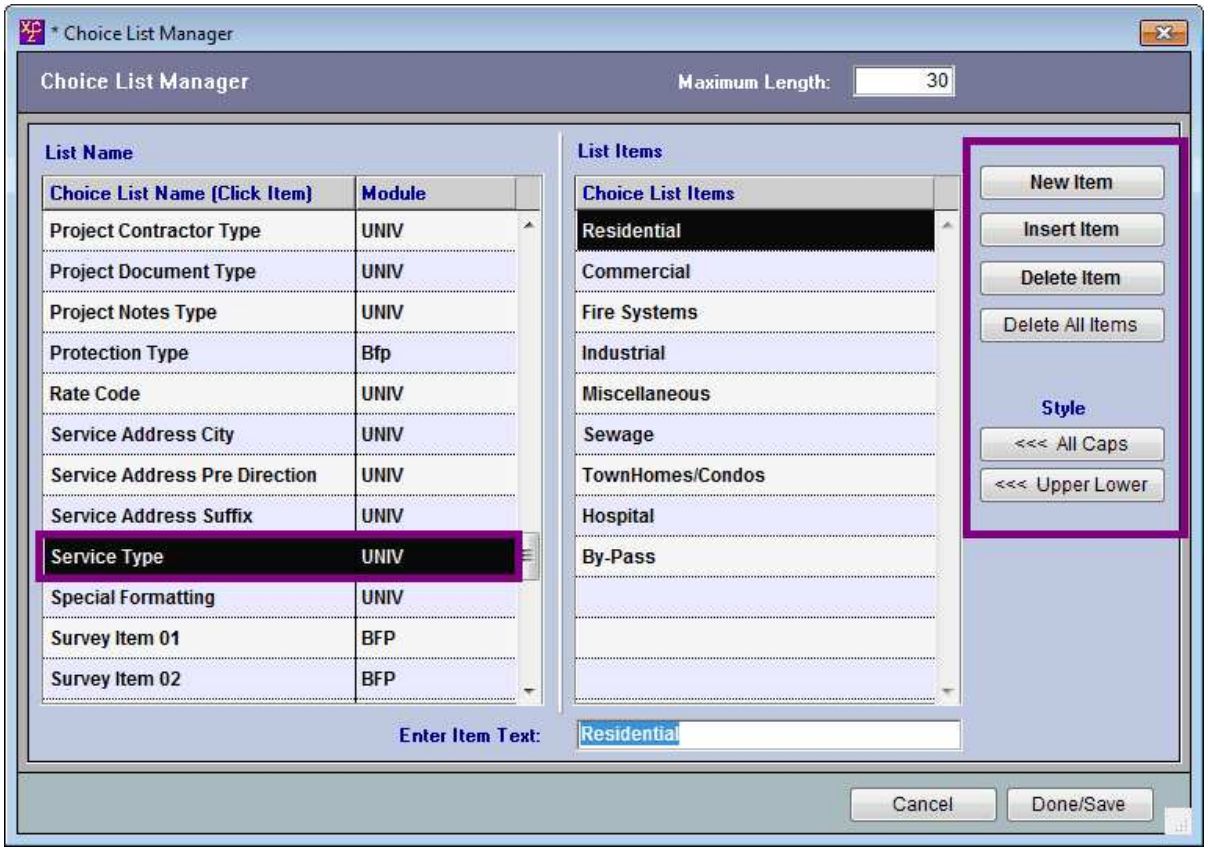


Notes:

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

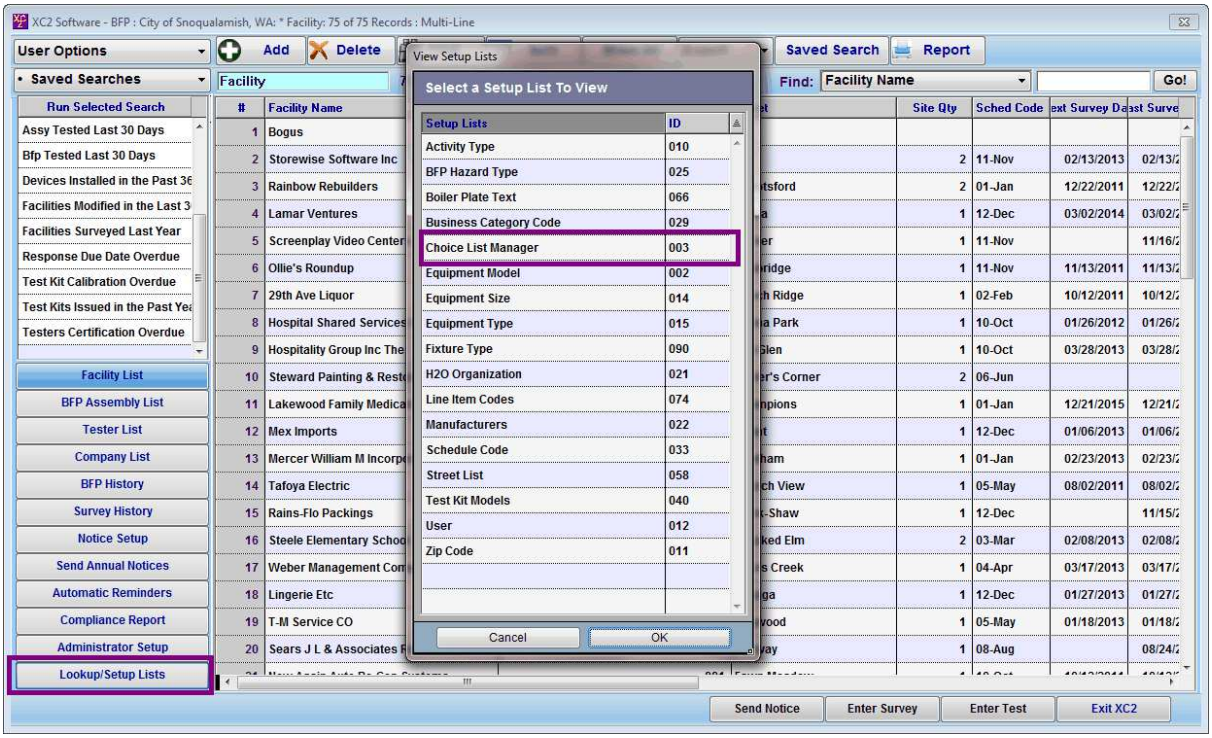
Shows you where you can enter Test Kit Manufacturers in XC2

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

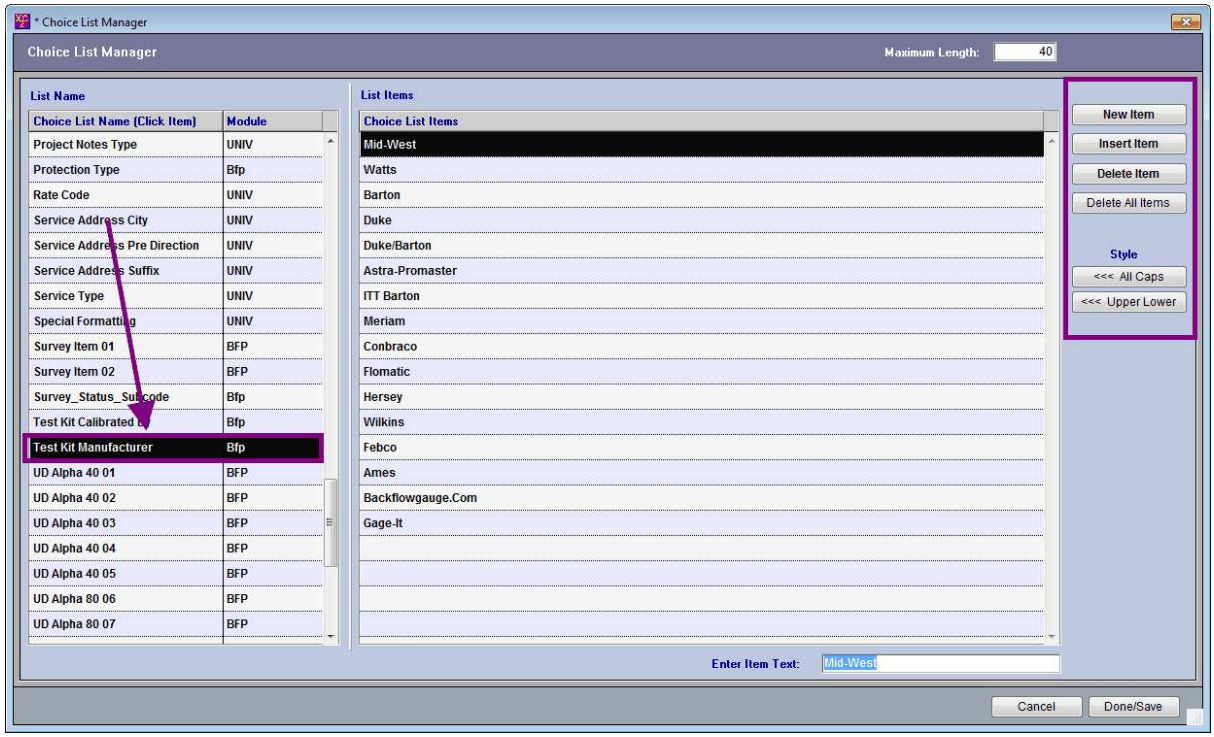


Notes:

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

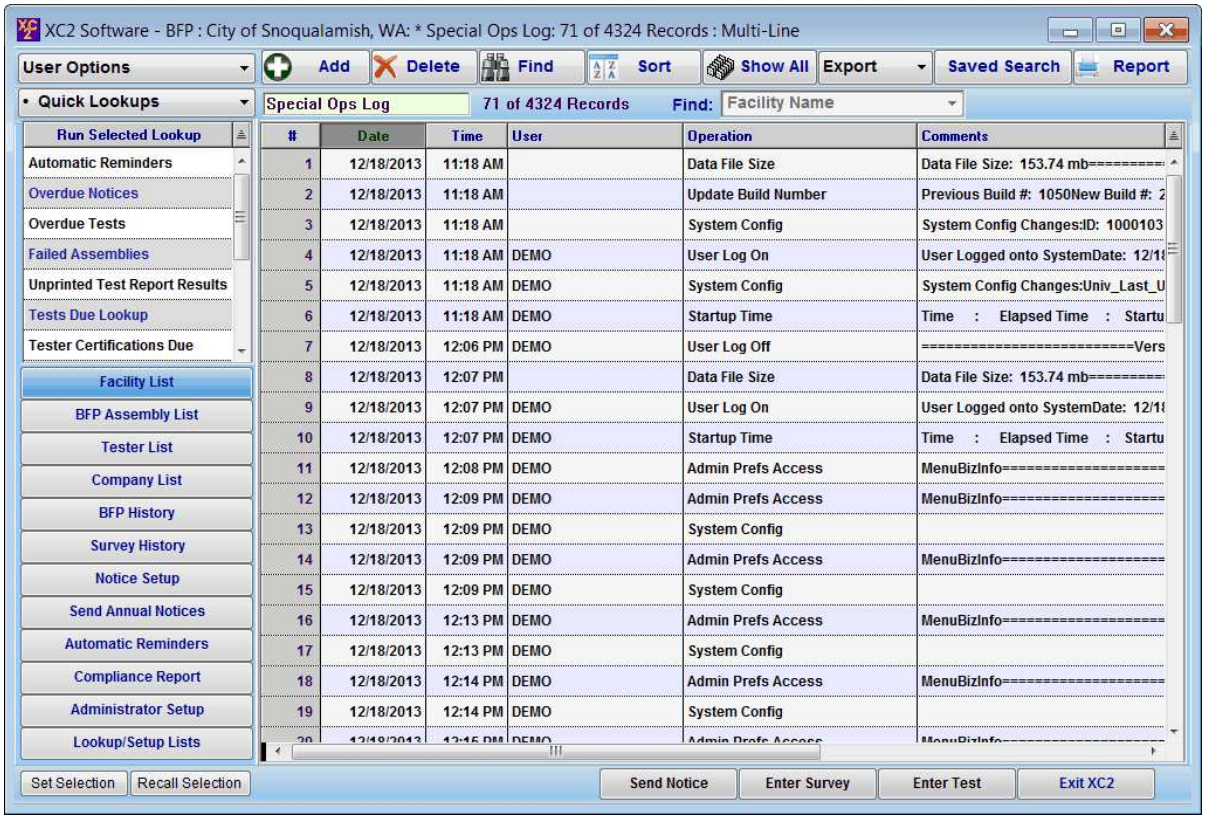
Keep Records of What Happened in XC2

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.



Notes:

XC2 Software Knowledge Base

Deduperator For Duplicate Facility Lookup

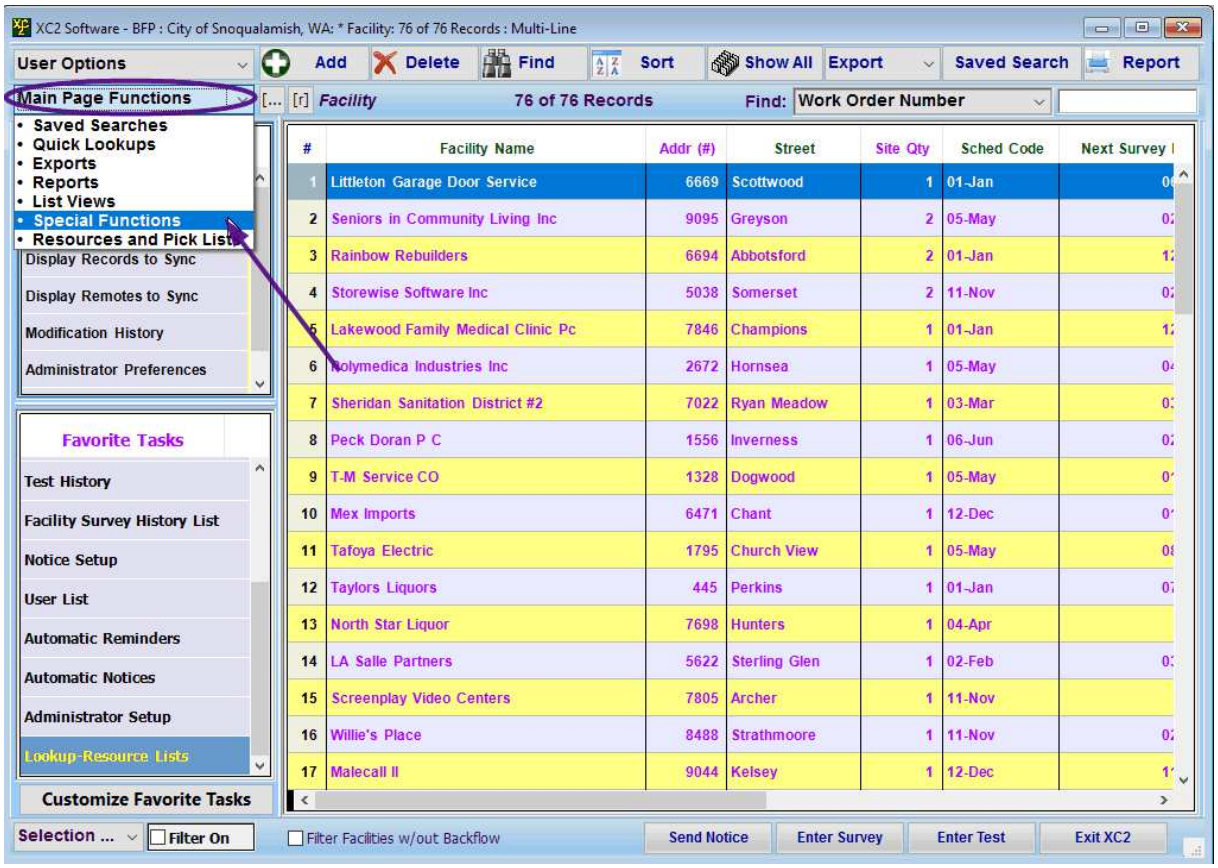
KB Asset ID: 3509

Deduperator is a handy tool used to lookup duplicate facility records based on several criterias

Accessing Deduperator

From the Main Page

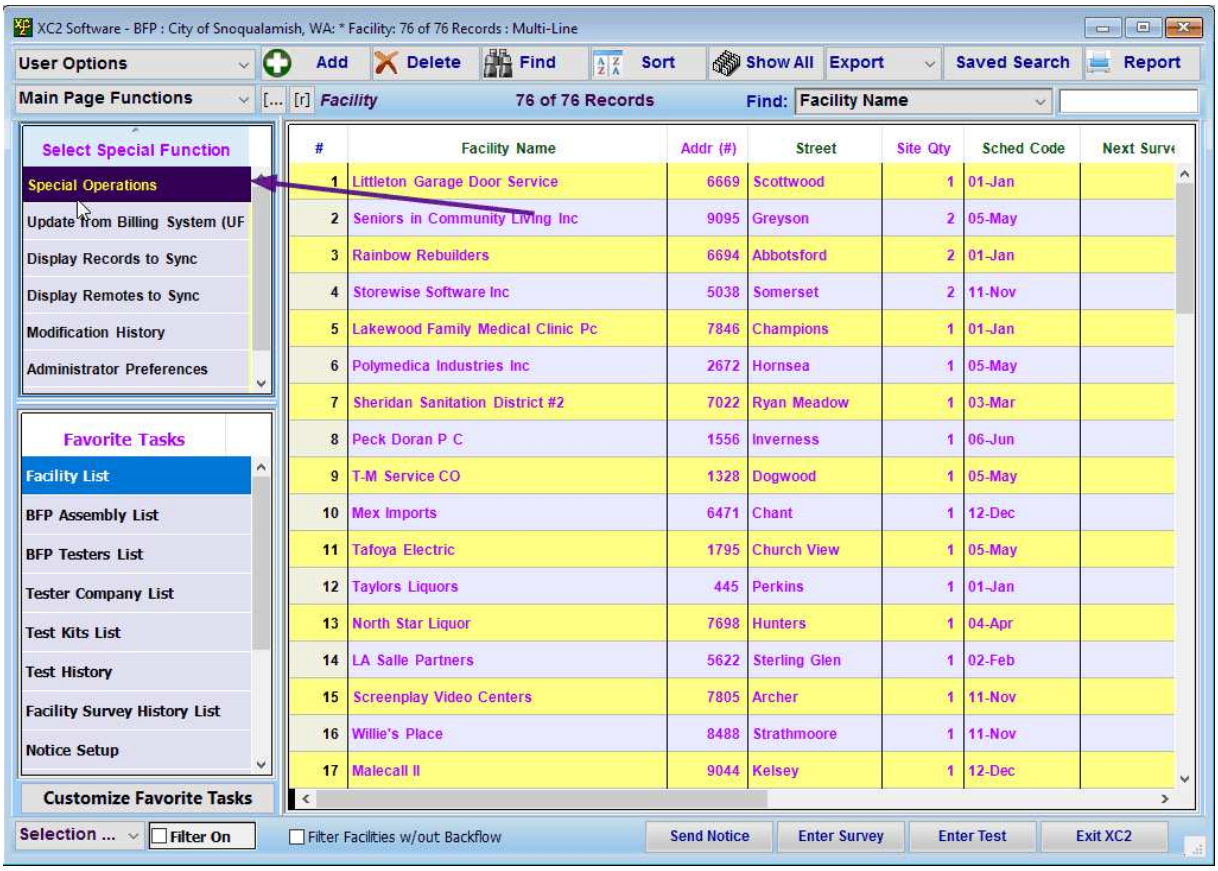
- Main Page Functions
- Special Functions



#	Facility Name	Addr (#)	Street	Site Qty	Sched Code	Next Survey I
1	Littleton Garage Door Service	6669	Scottwood	1	01-Jan	0
2	Seniors in Community Living Inc	9095	Greyson	2	05-May	0
3	Rainbow Rebuilders	6694	Abbotsford	2	01-Jan	1
4	Storewise Software Inc	5038	Somerset	2	11-Nov	0
5	Lakewood Family Medical Clinic Pc	7846	Champions	1	01-Jan	1
6	Polymedica Industries Inc	2672	Hornsea	1	05-May	0
7	Sheridan Sanitation District #2	7022	Ryan Meadow	1	03-Mar	0
8	Peck Doran P C	1556	Inverness	1	06-Jun	0
9	T-M Service CO	1328	Dogwood	1	05-May	0
10	Mex Imports	6471	Chant	1	12-Dec	0
11	Tafoya Electric	1795	Church View	1	05-May	0
12	Taylors Liquors	445	Perkins	1	01-Jan	0
13	North Star Liquor	7698	Hunters	1	04-Apr	
14	LA Salle Partners	5622	Sterling Glen	1	02-Feb	0
15	Screenplay Video Centers	7805	Archer	1	11-Nov	
16	Willie's Place	8488	Strathmoore	1	11-Nov	0
17	Malecall II	9044	Kelsey	1	12-Dec	1

Notes:

Select Special Operations



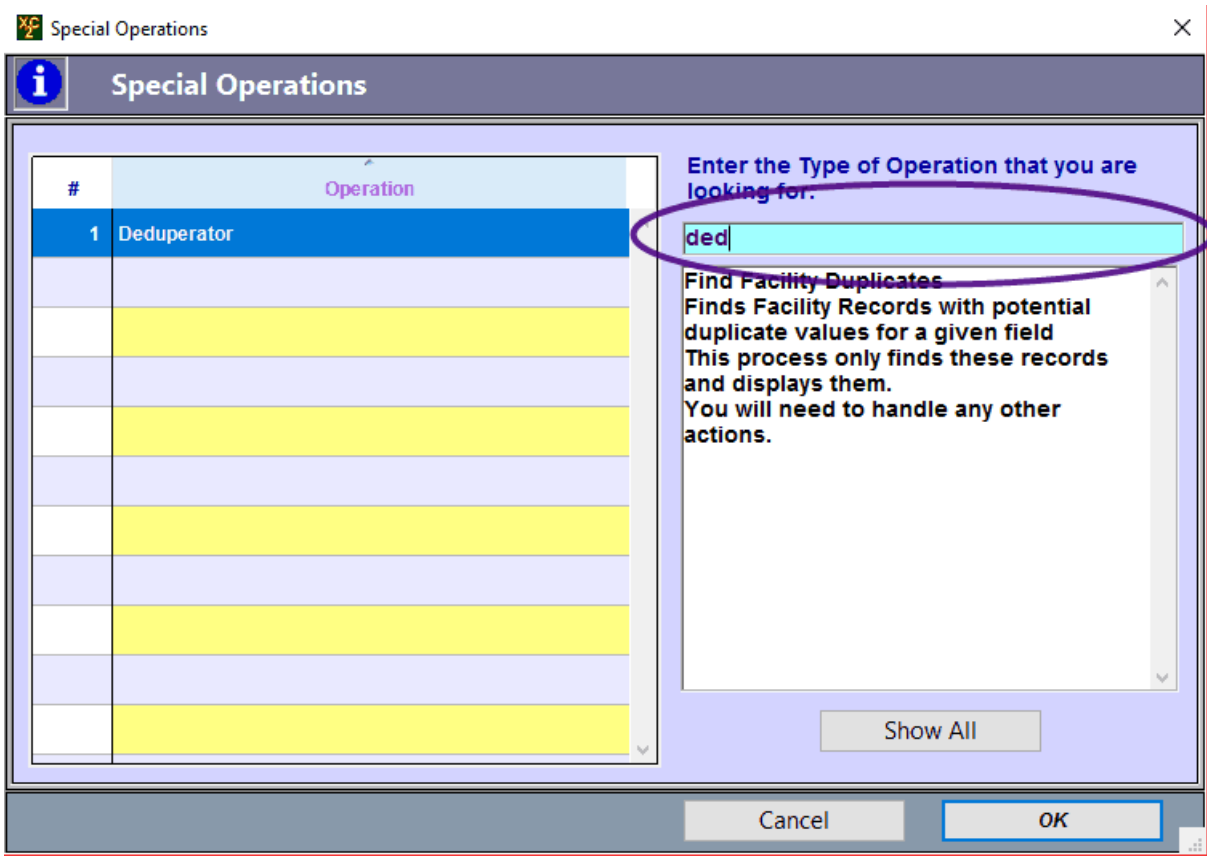
Notes:

Type in first few letters of special operation

Enter - DEP

Highlight Special Operation in list

Click OK



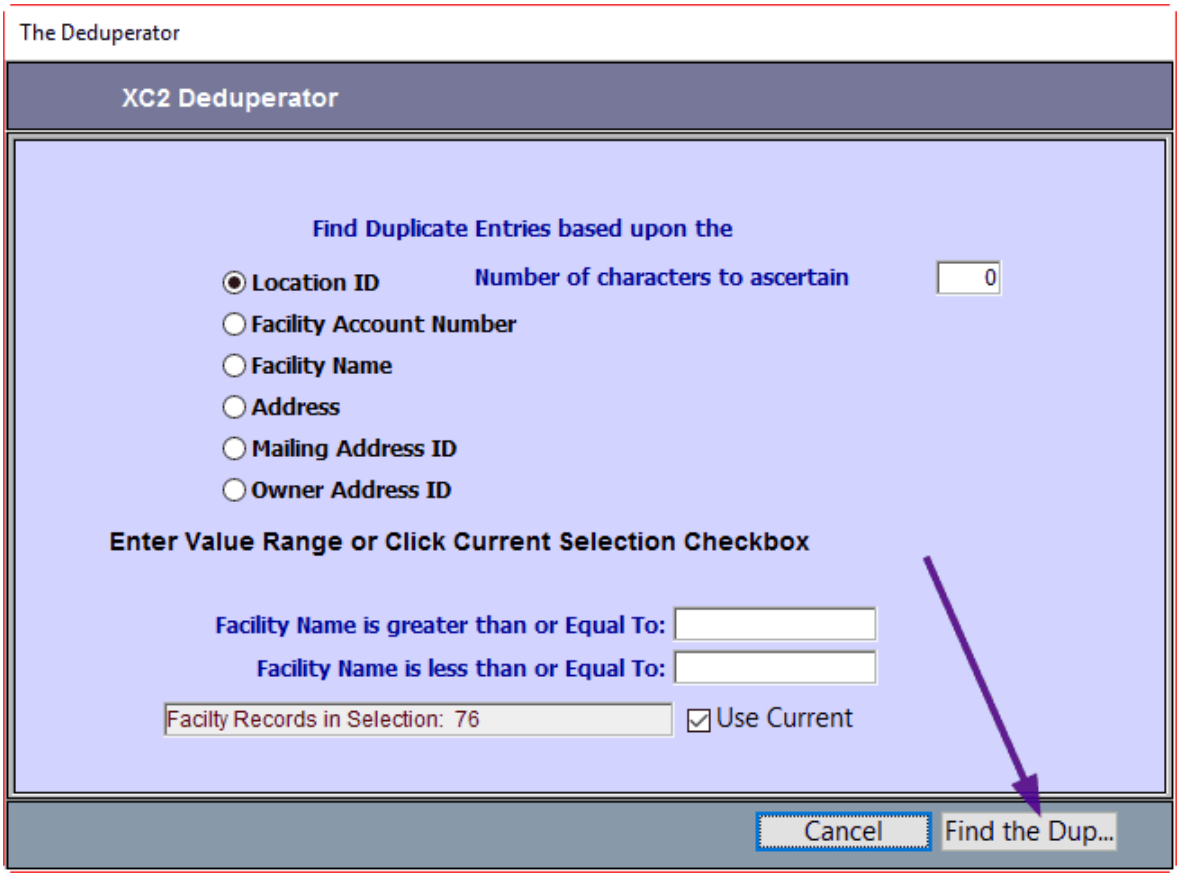
Notes:

Select duplicate catagory

You can lookup duplicate facilities by

Account Number
Facility Name
Service, Mailing, or Owner Address

Click Find The Dup



Notes:

XC2 Software Knowledge Base

Assigning Inspector To Facility

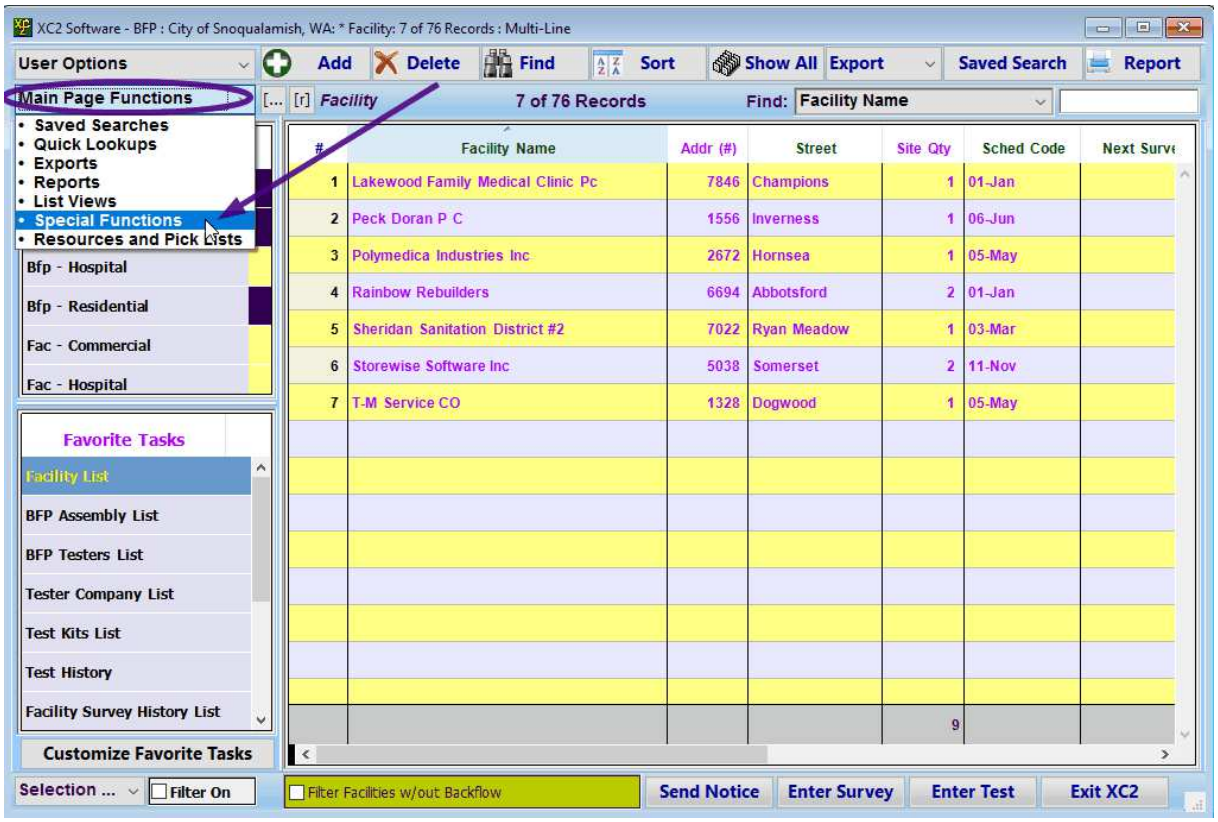
KB Asset ID: 3511

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

Perfom a seach for facility records who will be assigned the SAME inspector

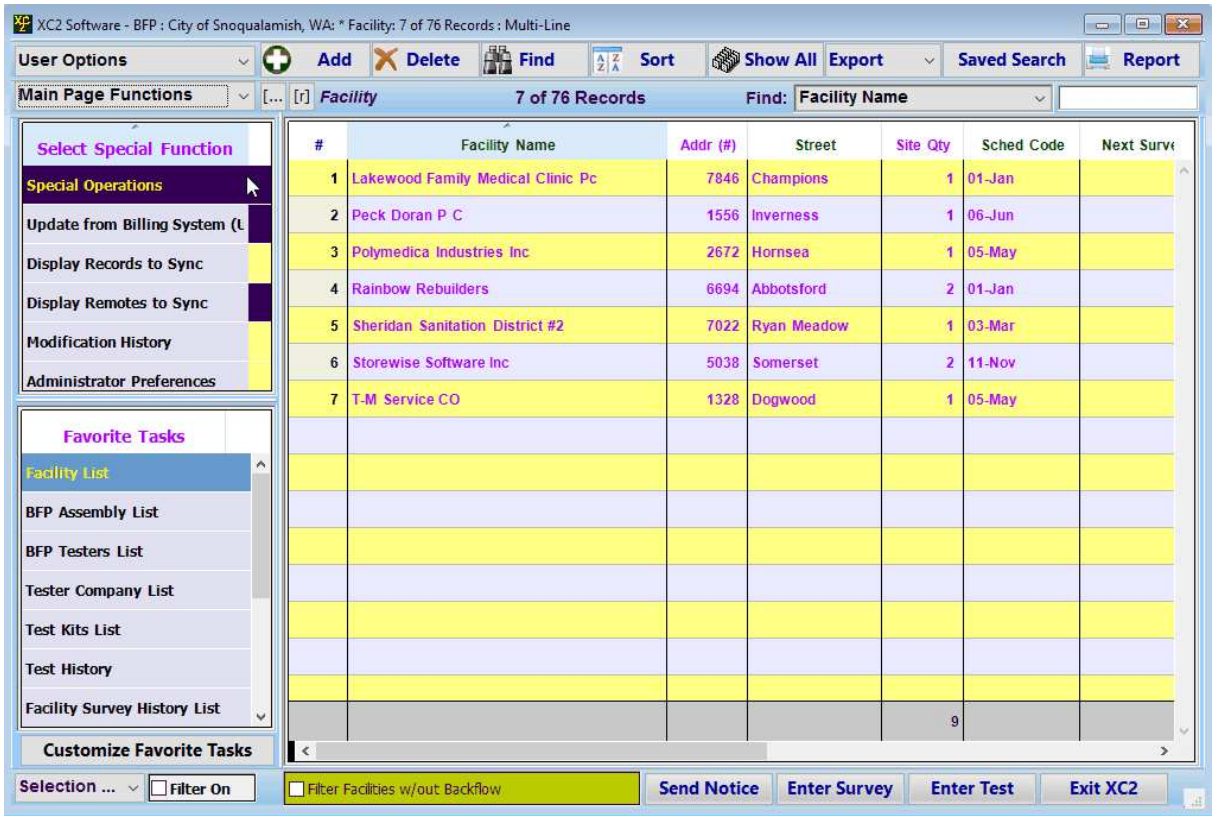
- Click Main Page Functions
- Special Functions



Notes:

Special Operations

Double Click Special Operations

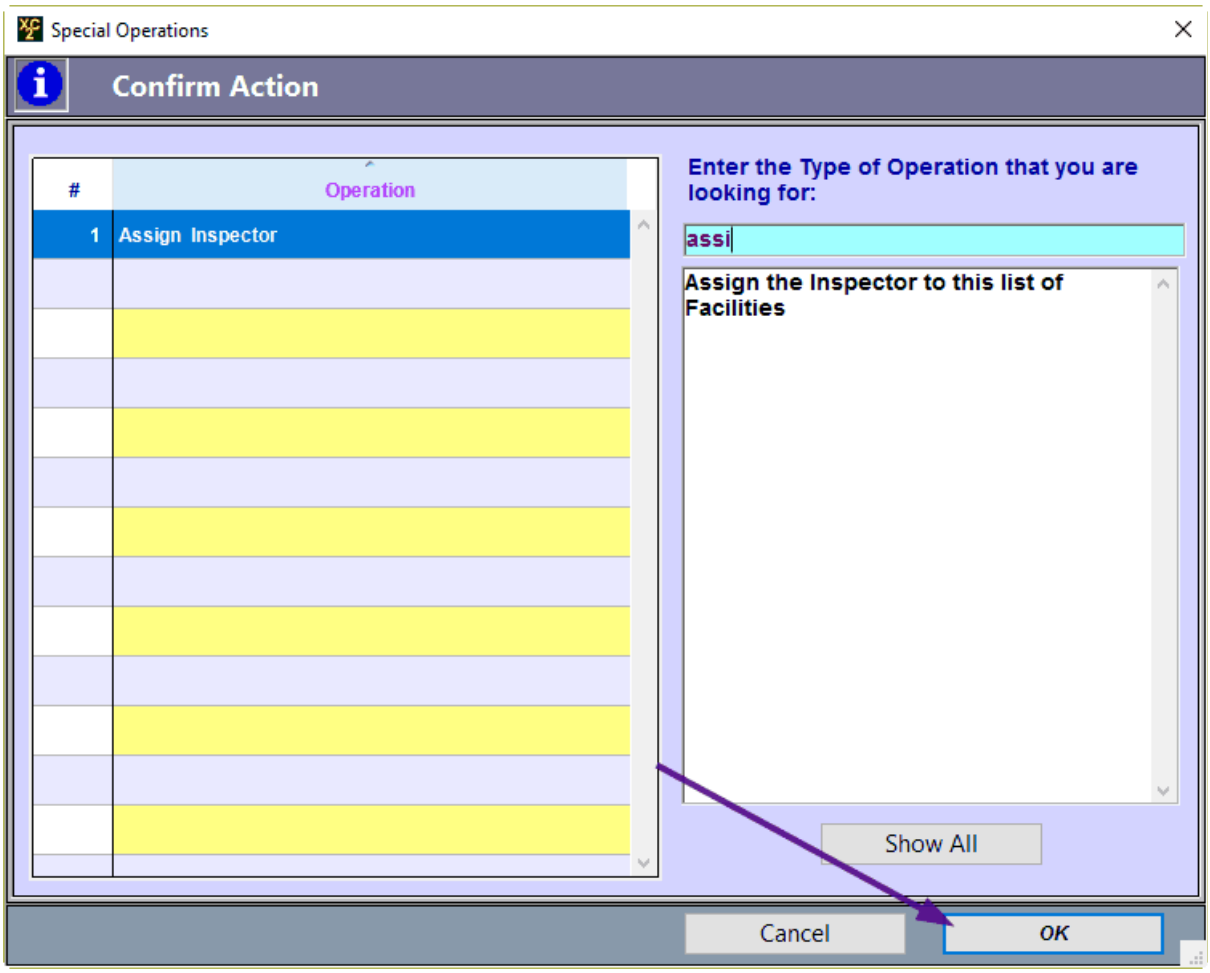


Notes:

Enter the name of operation

Enter the first few characters of the operations

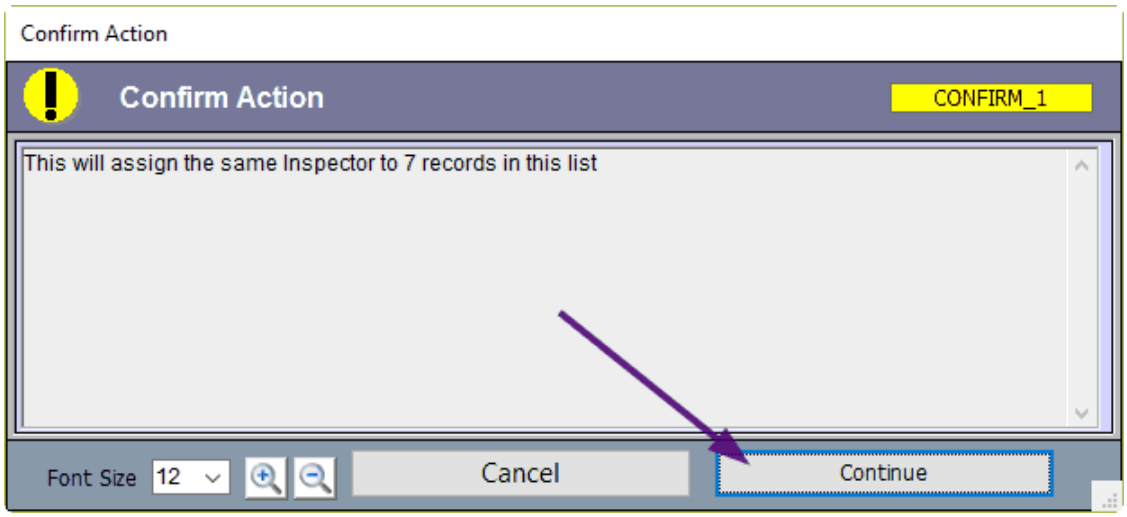
- Highlight operation
- Click OK



Notes:

Confirm the records to be changed

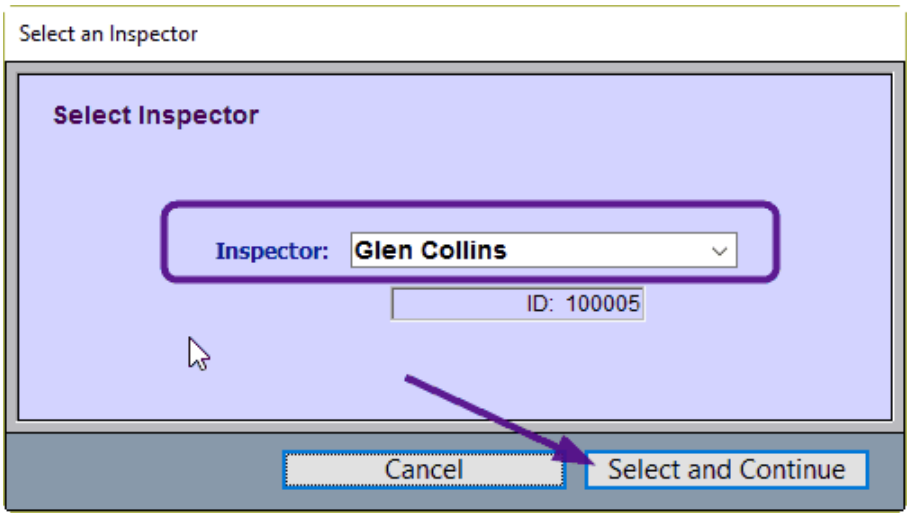
Click Continue



Notes:

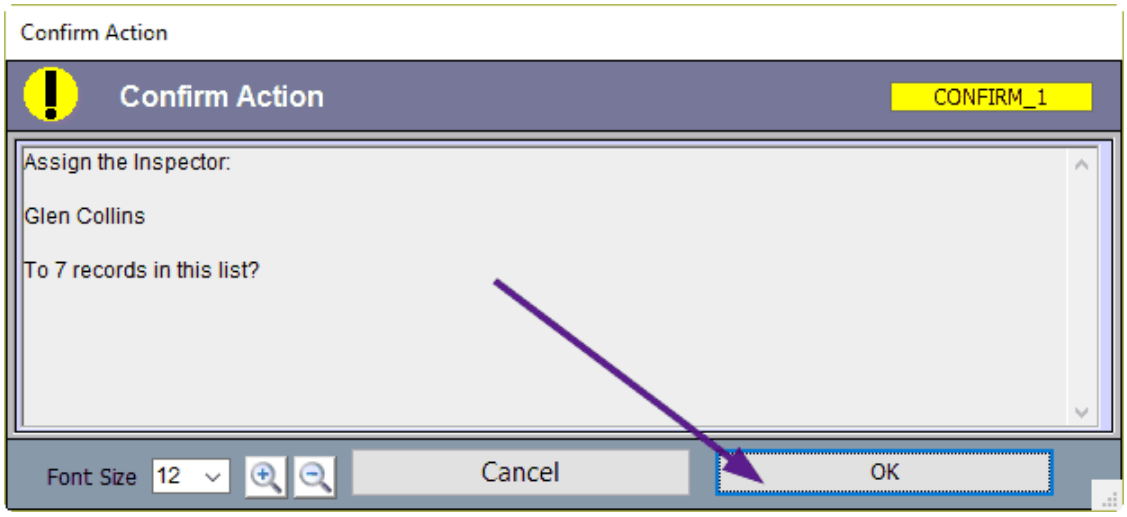
Select Inspector

Select and Continue



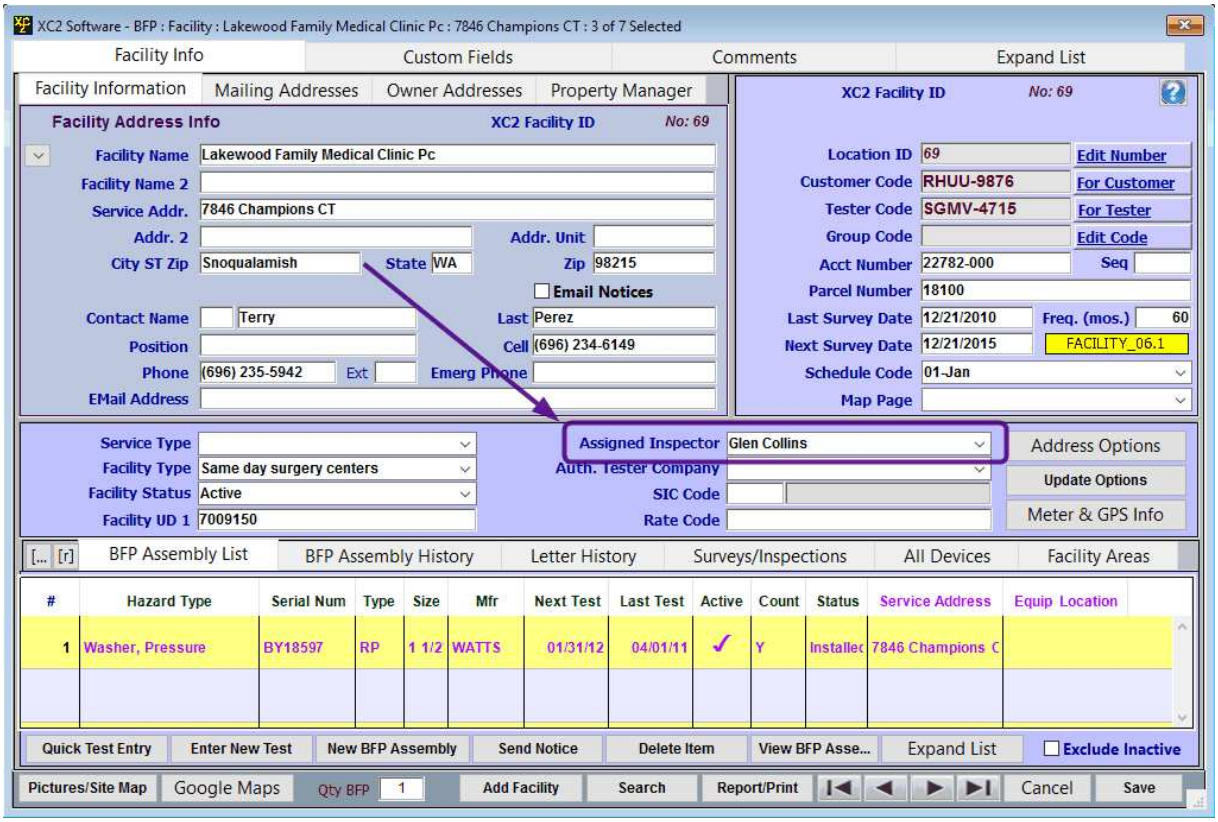
Notes:

Confirm the change



Notes:

Inspector is assigned



Notes: