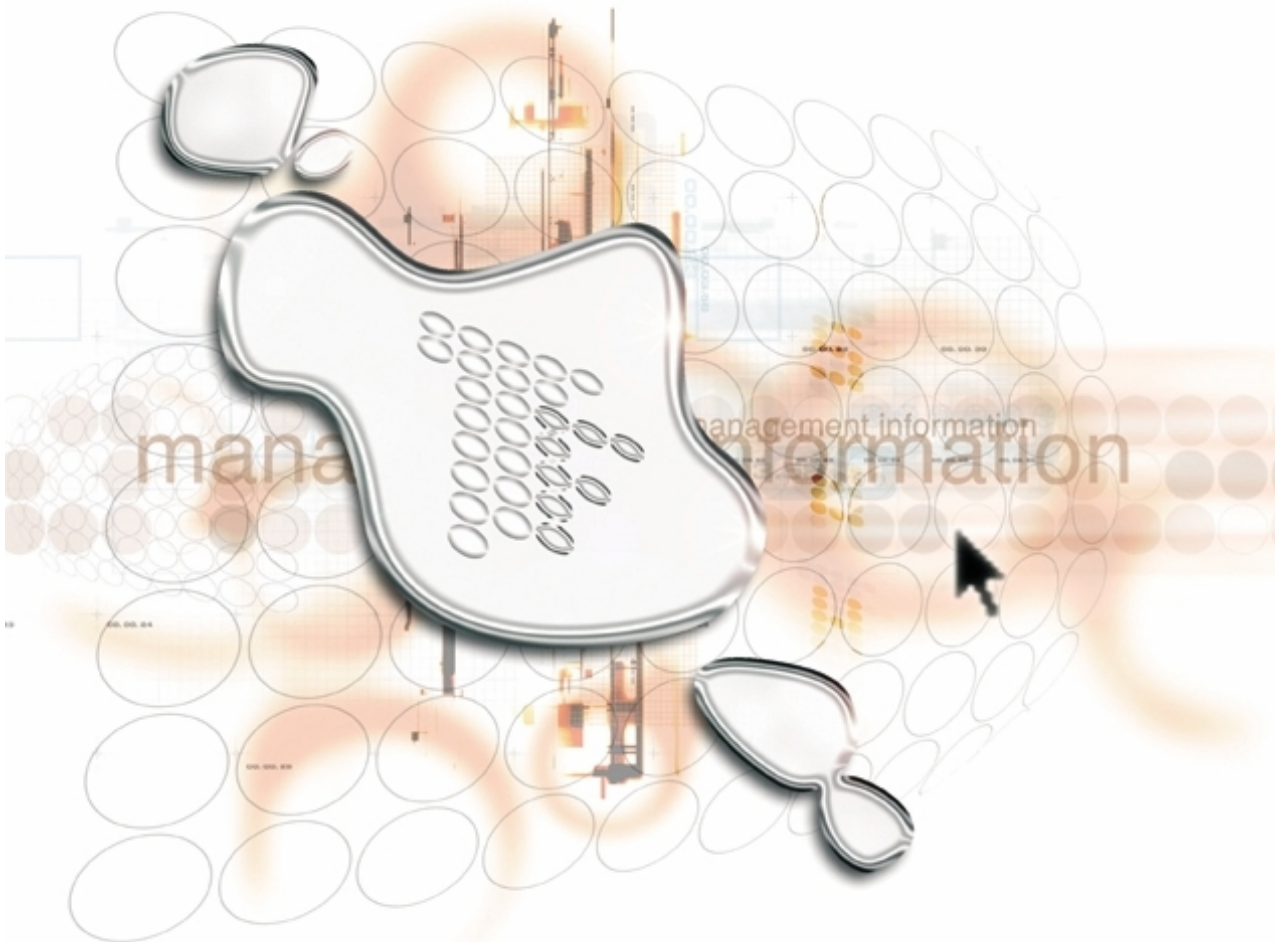


the technology **forge**



Hazards Handheld User Manual v2.1.01



tf. facility

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1 tf. facility Background

tf. facility is a premises register that contains detailed information on entities such as sites, buildings, blocks and spaces. This data can be fully integrated with other modules such as Suitability, Sufficiency, DAA (Disability Access Audit) and Hazards, amongst others. There is also the capability to link documents and drawings, including linking CAD drawings to import data in to the system.

tf. facility enables you to easily manage the information entered, it provides full reporting and analysis, and automates and facilitates the tasks involved in managing a variety of establishments.

tf. facility has been developed to conform to DfES requirements and therefore a number of standard outputs have been developed which will streamline the production of electronic data exchange.

The system also makes extensive use of Microsoft products such as Word and Excel to output data quickly and easily. We therefore recommend that you ensure that these products are available on the managing of user permissions and system security.

2 Introduction to the Hazards Module

The **Hazards** module is designed to accommodate a collection of registers defined by a particular hazard. The most common use of our hazard register is for tracking and recording the presence of Asbestos Containing Materials (ACM's). This has been developed in conjunction with the recommendations of MDHS 100 (correct at time of print – 2002). Other hazard types can be set up by the systems administrator e.g. confined space, IT equipment. For the purposes of this manual we will use the asbestos register as an example and show example data from MDHS 100.

Before using the Hazards module it is a pre-requisite that you are familiar with the standard features of tf. facility. An outline of interface rules and system functions can be found under the Introduction to tf. facility section of the Asset Management Manual.

The module requires that the property register contain data so that a hazard can be associated with a particular building or room. The module enables you to record, monitor and maintain hazards associated with properties or assets.

Hazard Surveys are carried out at **Block** level. Any hazards detected or presumed are recorded during the survey. **Sample, Action, Risk Assessment** and **Inspection** details can be documented against a hazard. It is also possible to record instances of **No Hazards** found in a room or **No Access** to a room.

The hazard information is recorded and accessed via the main screen of tf. facility. The Hazards module can be found on the tree structure in the left hand pane of the screen. Figure 2.1 shows an example of the structure.

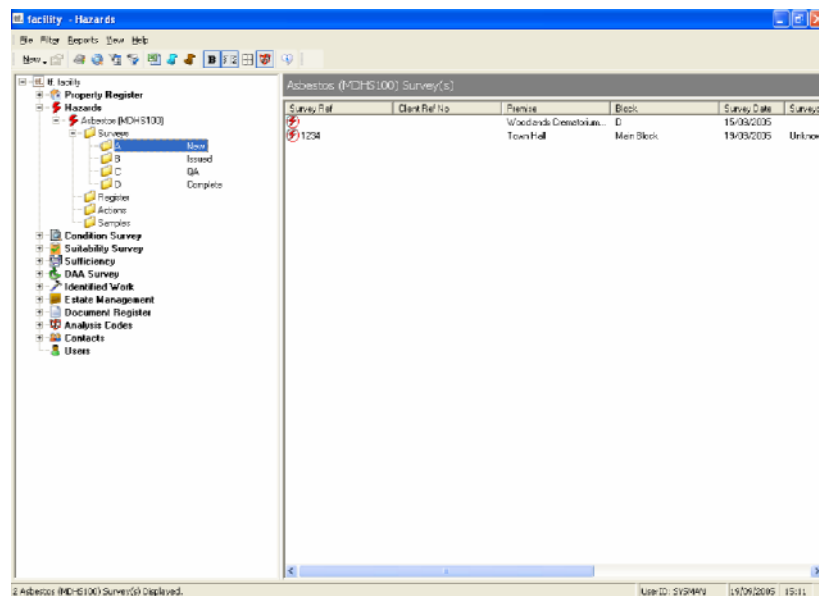


Figure 2.1

Each level of the tree can be accessed by the plus buttons to the left of the modules. The Hazards module on the tree may consist of one or more **Survey Types** (e.g. Asbestos, Confined Spaces).

The first level below the type is **Surveys**, where the main surveys are contained. Each status folder (**A - New**, **B - Issued**, **C - QA** and **D - Complete**) enables the management of the surveys. For example a Survey is created at the **A - New** status, then moved to **B - Issued** where the data collected is then entered. The survey can then be moved to **C - QA** if the survey is to be verified and to **D - Complete** when the survey data is complete. See section 3.6 of the **Hazards Module** manual for more details on moving the surveys between each status.

The **Register** folder on the tree structure contains a complete list of all the Hazards recorded against the Survey Type, while the **Actions** folder shows every Action recorded.



Hint

The first one hundred records are displayed on the list views (Register and Actions folders) in the right hand pane of the screen. When this is exceeded **More** and **All** buttons will be apparent at the top right of the pane. Use these buttons to view any additional records.

3 System Conventions

3.1 Handheld Screen

The handheld Hazard Survey module follows a standard set of user interface rules. This enhances usability and reduces the time taken to learn the software. The module is broken down into logical sections that have areas for entering and manipulating data.

At the top of each screen is a title that shows you what the current form relates to.

3.2 Pick Lists

The handheld module makes extensive use of pre formatted data lists (pick lists). These ensure a quick and consistent means of gathering data. These lists appear as a 'black triangle' on the right of the field and pressing the screen on one of these triangles will show a list of acceptable choices for the data field (see fig 3.2.1).

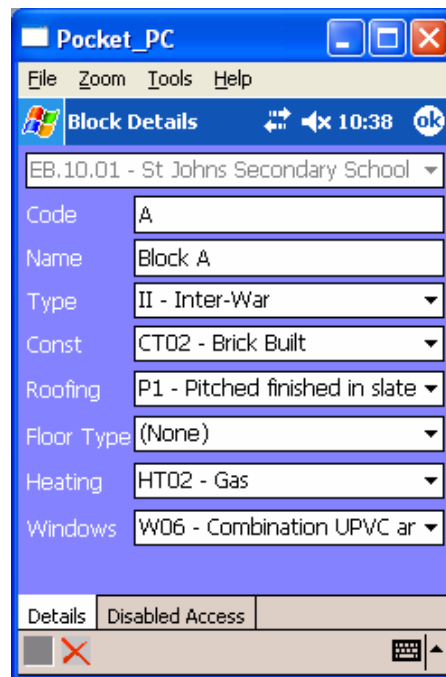


Figure 3.2.1

Selecting one of these options will populate the field next to the black triangle.

3.3 Action Buttons

The handheld module adopts the convention of buttons to create a new record, save a record or to delete a record.

3.4 Free Text Fields

Whenever a large amount of text is needed, the system will allow you to enter it free hand into the field e.g. comments. This field is displayed as a large white box.

3.5 Closing a Screen

An Ok icon is visible at the top right of every screen (see fig 3.5.1). Tapping on this button closes the current screen and returns to the previous screen.

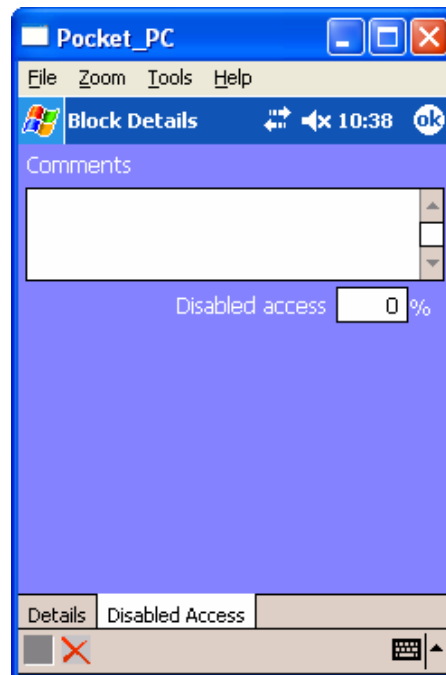


Figure 3.5.1

3.6 List Views

When using the system there are occasions when a list of data items will be shown on the screen e.g. a list of rooms. Highlighting one of the items in the list, with the stylus, makes it the active selection (see fig 3.6.1).

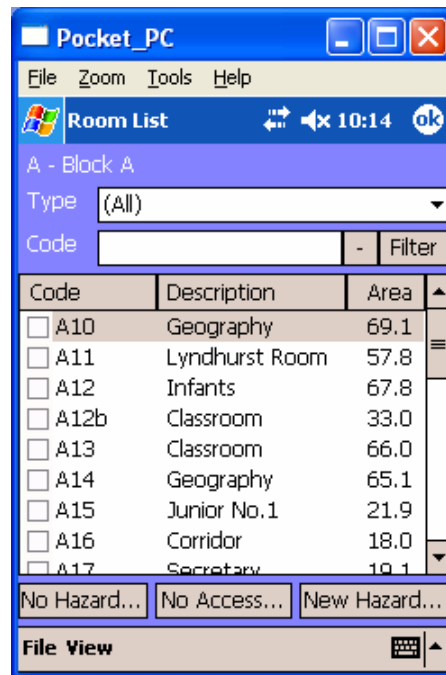


Figure 3.6.1

If the list has a scroll bar down the right hand side, it indicates that there are more entries on this list than can be shown. Pressing the arrow on the scroll bar will move the list up or down (depending on the way the arrow is pointing).

3.7 Text Entry using Transcriber

Transcriber recognises words and phrases written in cursive, print, mixed print, cursive styles, numbers and combinations of symbols. This method allows you write anywhere on the screen using the stylus. To access this method, click on the black triangle in the bottom right of the screen. This will list the different methods available for entering text, select transcriber with the stylus.

3.8 Text Entry with the Keyboard

An alternative to using transcriber is to use the inbuilt pop-up keyboard. To access the keyboard, click on the black triangle in the bottom right of the screen. This will list the different methods available for entering text, select keyboard with the stylus (see fig 3.8.1).

This will load the keyboard. Enter text by tapping on the required letter using the stylus.

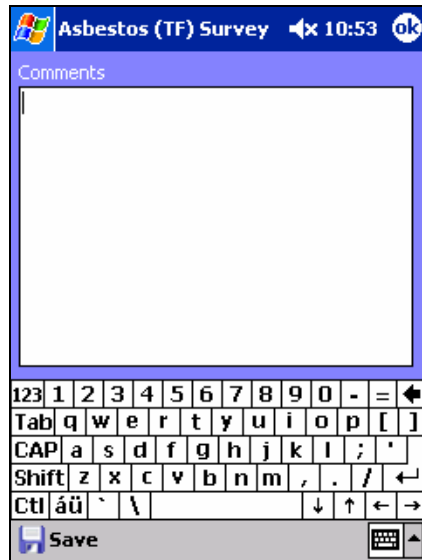
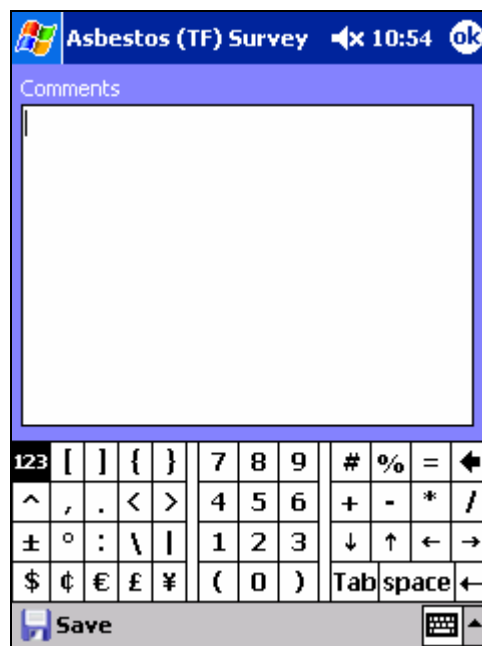


Figure 3.8.1

It is also possible to access numbers and special characters through this mechanism by selecting the 123 key in the top left hand corner of the keyboard.



To hide the keyboard, click the symbol in the bottom right hand corner.

4 Hazard Surveys

4.1 Introduction

Hazard Surveys are carried out at **Block** level. When created, a Hazard Survey form holds all survey details and hazard items recorded during the survey.

4.2 Creating a Hazard Survey

Select the **Hazard Type** by operating the plus button to the left of the **Hazards** module on the property Tree. Select the **Surveys** folder via the plus button for the hazard type (e.g. asbestos). Highlight the **A - New** status level, then with the mouse in the right pane, right click the mouse and select **New** from the context sensitive menu (see figure 4.2.1).

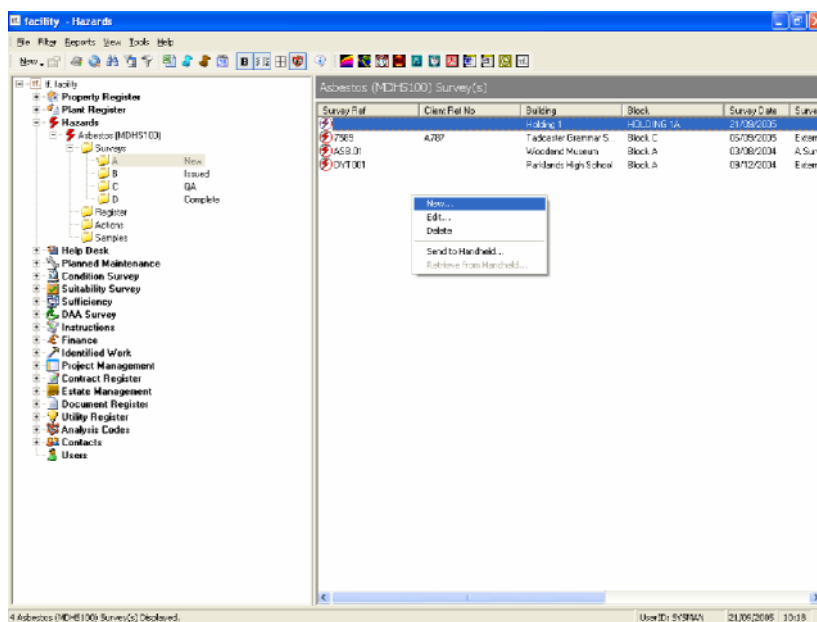


Figure 4.2.1

Using the plus buttons, select a **Block** from the tree on the **Select Block** form via the plus buttons and click **OK**. This will activate the **Hazard Survey** form (see figure 4.2.2).

Note: Use the **Search** field at the bottom of the form by entering your criteria and selecting the ellipsis button.

Figure 4.2.2

On the **Details** tab enter the **Survey Ref**. This field is auto-populated with **(NEW)** when a new hazard survey is created. Each survey must have a unique survey ref. and is a mandatory field. Enter a Client Ref No if desired, this is optional.

Choose a **Survey Type** from the pick list. This is also a mandatory field. Select a **Surveyor** via the ellipsis button. This is a mandatory field. Select a **Sampler** if desired.

The **Survey Date** will be automatically populated with today's date. This can be changed to another date. If the date is left blank it will be automatically defaulted to today's date. Enter any notes in the Comments text box.

Note: All the mandatory fields must be completed before a survey can be sent to the handheld. However once sent to the handheld the fields can be amended and then retrieved back to the PC (see section 6.1 for amending the survey details and section 10 for retrieving surveys).

4.3 Creating Multiple Surveys

Surveys can be created in multiple to make the process of sending the surveys to the handhelds quicker. Surveys can also be sent to the handhelds in multiple, see section 5 for more details on how to do this.

To create multiple surveys, select **New** to open the **Select Block** form (as explained in section 4.2). Use the plus buttons to expand the levels to see the blocks for the properties that the surveys are to be created for. Then while holding down the **Ctrl** key on the keyboard use the mouse to select each block.

Figure 4.3.1 shows an example of multi-selected blocks. Click **OK** to create the surveys. A message will confirm how many surveys have been created. All surveys created in a batch will

have the **Survey Ref.** (New). However, these will need to be changed to a unique number before the surveys can be sent down to the handhelds.

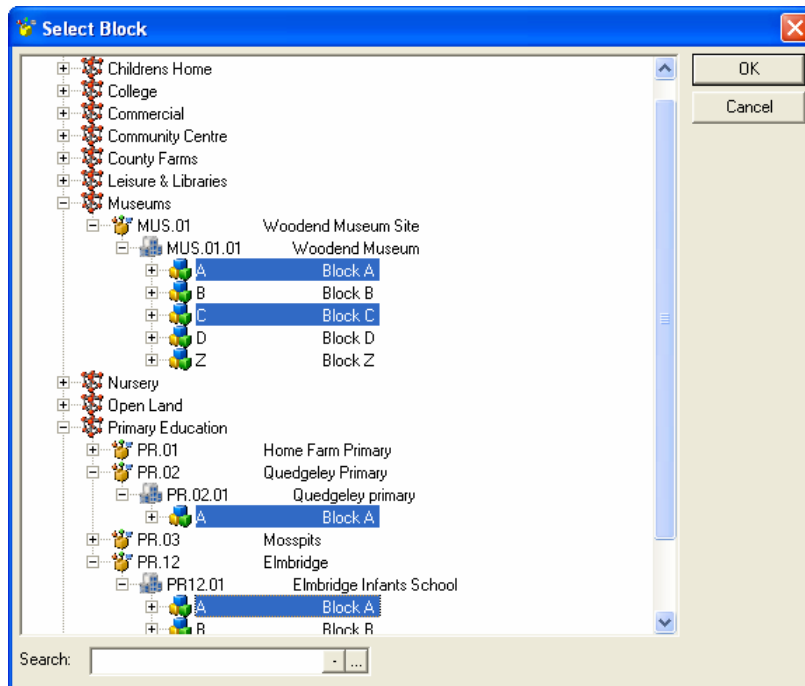


Figure 4.3.1

4.4 History Tab

The **History** tab (fig 4.4.1) records when the survey is amended. For example, when the date and time that the survey record was created. It also records when **No Access** or **No Hazard** records are added or removed and for which room. This enables rooms to be audited, e.g. if a room once had no access, but now a Hazard has been recorded against it, this will be detectable on the History tab.

The screenshot shows a window titled "Hazard Survey" with a blue header bar. Below the header, there is a tabbed interface with tabs labeled "Details", "Survey Items", "No Access", "No Hazard", "User Defined", and "History". The "History" tab is currently selected. Above the tabs, there is a "Location:" label and a text box containing "LE.10.01 - Kirkby Leisure Centre - Block A". Below the tabs, there is a table with three columns: "Event Time", "Description", and "Who". The table contains five rows of data, all with "System Manager" in the "Who" column. Below the table, there are buttons for "Details...", "Add Note...", and a checkbox for "Reminders only". At the bottom of the window, there are buttons for "Delete", "Status/History...", "Technical Report...", "Save", and "Close".

Event Time	Description	Who
06/07/2004 16:06	Survey Issued to Handheld	System Manager
06/07/2004 16:06	Status set to Issued	System Manager
06/07/2004 15:59	Space 'A12b - Classroom' Added to 'No Access' list.	System Manager
06/07/2004 15:59	Space 'A23 - Boys' Added to 'No Hazard' list.	System Manager
06/07/2004 15:58	Status set to New	System Manager

Figure 4.4.1

Note: If a survey with existing data (e.g. Hazard, No Hazard and No Access records) has been sent down to the handheld to be updated then any amendments made to these records will be shown on the History tab on the PC. For example if a **No Access** record is cleared on the handheld and updated with a hazard the room removed will be on the **History** tab.

4.5 Editing a Hazard Survey

To edit a Hazard Survey, select the survey from the list view on the main tf. facility screen. Highlight the survey in the right pane, right click the mouse and select **Edit** from the context sensitive menu. This will open the **Hazard Survey** form.

When amendments to the data are made the **Save** button is enabled. Make the necessary changes to the form and operate the **Save** button. **Close** the form.

4.6 Deleting a Hazard Survey

To delete a Hazard Survey, select the item from the status on the list view. Right click the mouse and select **Delete** from the context sensitive menu.

Note: A **Hazard Survey** cannot be deleted until all the records attached to the survey have been deleted.

5 Sending Hazard Surveys

Before the **Hazards** module can be used on the handheld, **Hazard Surveys** need to be sent from the main application. Once the survey(s) have been created at the **A – New** status (see section 4.2) they can be sent to the handheld.

IMPORTANT: When surveys are sent to the handhelds, it will overwrite any surveys currently on the handheld. Make sure any surveys have been retrieved or backed-up (see sections 9 and 10) before sending further surveys. Also when surveys have been sent to the handheld, **do not** under any circumstances delete the survey on the PC or the survey will not be able to be retrieved from the handheld.

Make sure the handheld is connected. Highlight the survey(s) in the right hand pane, then with the mouse in the right hand pane, right click the mouse and select **Send to Handheld** from the context sensitive menu (see figure 5.1)

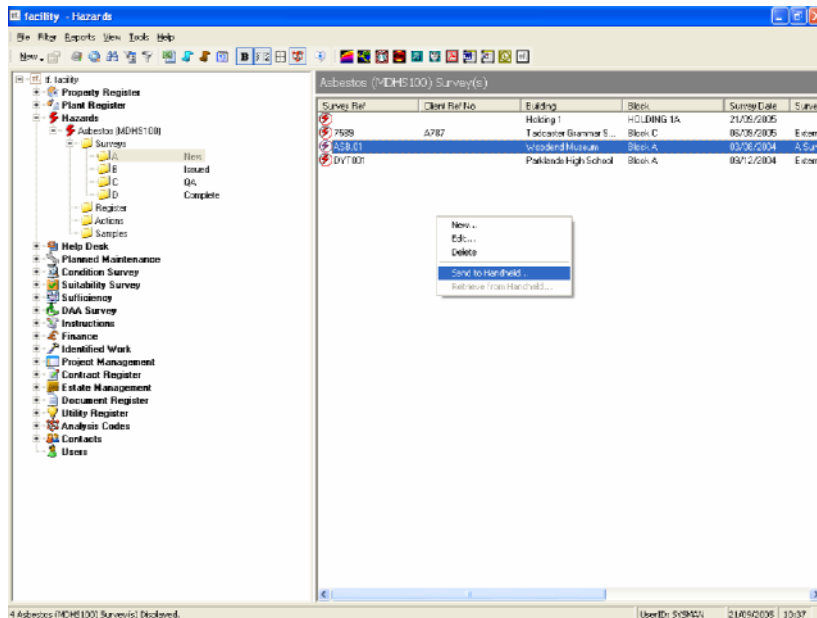


Figure 5.1

It is possible to send more than one survey down to the handheld at any one time. To do this, use the **Ctrl** or **Shift** keys on the keyboard to highlight the surveys then select the **Send to Handheld** from the context sensitive menu.



Hint

Holding down the **Ctrl** key whilst selecting surveys from the list enables surveys to be multi-selected one by one, whilst holding down the **Shift** key will select a group of surveys. For example select a survey then select another further down the list and all the surveys between the two will also be selected.

The transfer will take place automatically first on the PC and then on the handheld. All surveys sent to the handheld will be apparent on the handheld.

Note: Whenever new surveys are transferred to the handheld this will overwrite any existing data. Any surveys on the handheld should be backed up (see section 9) or be retrieved back on to the PC before anymore are sent down.

Any Surveys sent to the handheld will automatically move from the **A – New** status folder on the PC to **B – Issued**.

Note: It is possible to send surveys to the handheld, which already contain data (e.g. **Hazard**, **No Hazard** and **No Access** records) so that the survey(s) can be updated.

6 Performing Hazard Surveys

6.1 Starting a Survey

When the survey(s) have been transferred the **Hazards** application will be open on the handheld and the **Start** button active (see figure 6.1.1). The application can also be accessed on the handheld via the **Start** button on the **Programs** screen. When accessing the program in this way, tap on the **tfHazard** icon to open the application.

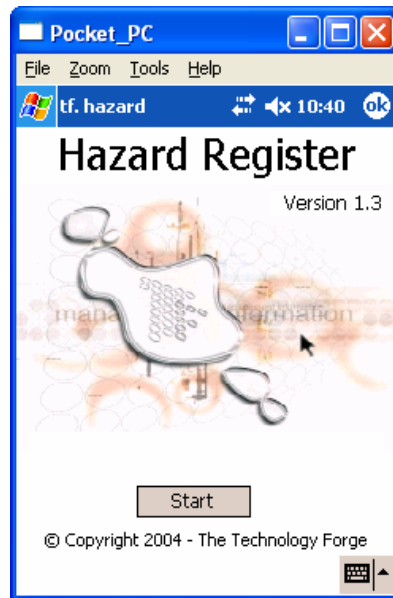


Figure 6.1.1

Tap on the **Start** button and any surveys on the handheld will be displayed on the **Survey List** screen (figure 6.1.2).

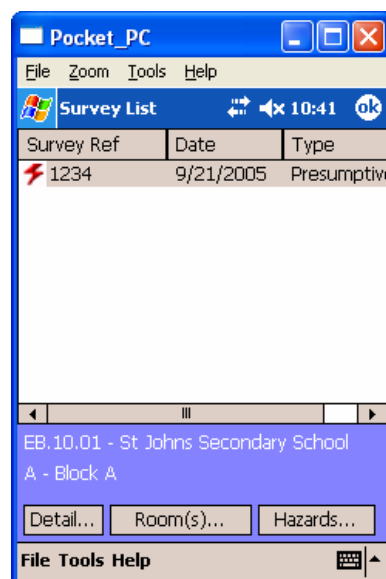


Figure 6.1.2

Highlight the survey from the list by tapping on it with the stylus before selecting any options. Once a survey is highlighted, it is then possible to add hazard details to the survey and to add or amend the survey details. When a Survey is highlighted the school and the block codes and descriptions will be displayed towards the bottom of the screen.

6.1.1 Survey Detail

To add or amend the survey details tap on the **Detail** button on the survey list screen. This will activate the **Survey Detail** screen (see figure 6.1.3).

The screenshot shows a 'Pocket_PC' window titled 'Survey Detail'. The interface includes a menu bar with 'File', 'Zoom', 'Tools', and 'Help'. Below the menu, there's a status bar showing a signal strength icon, a speaker icon, the time '10:41', and an 'ok' button. The main form area has a blue header with the text 'Location'. Below this, there are several input fields: 'EB.10.01 - St Johns Secondary School' in a text box, 'A - Block A' in a text box, 'Client Ref' in a text box, 'Ref' with the value '1234' in a text box, 'Type' with a dropdown menu showing 'Type 1 - Presumptive', 'Surveyor' with a dropdown menu showing 'A Surveyor', 'Sampler' with a dropdown menu showing '(None)', and 'Date' with a date picker showing '9/21/2005'. At the bottom of the form, there are three tabs: 'Details', 'Comments', and 'Comments 2'. Below the tabs, there is a 'Save' icon (a red 'X') and a 'Back' icon (a square with a dot).

Figure 6.1.3

This screen will display any information entered on to the Survey before it was sent down to the handheld. Data can be entered or amended on the **Details**, **Comments** or **Comments 2** tabs. When the screen has been updated tap on the **Save** icon at the bottom left of the screen, then tap the **Ok** button to leave the screen and return to the **Survey List**.

6.1.2 Room List

Highlight a survey then tap on the **Room(s)** button on the **Survey List** screen to activate the **Rooms List** (see figure 6.1.4).

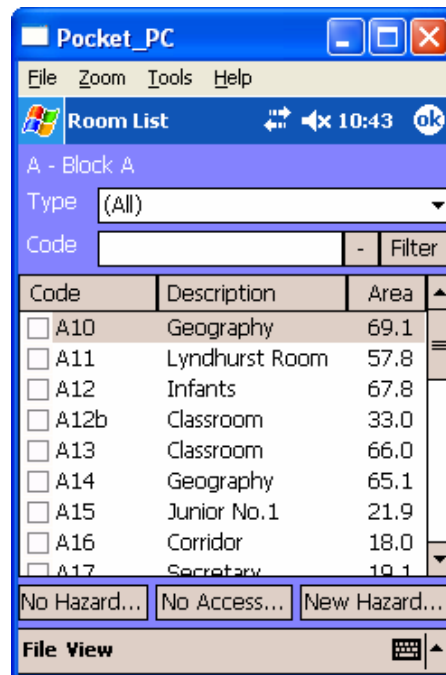


Figure 6.1.4

The list displays every room within the block that has been selected. The room data is automatically transferred to the handheld when the survey is sent down.

The **Room List** also indicates any hazard details recorded against the room: **Hazard** (see section 6.2), **No Hazard** (see section 6.3) and **No Access** (see section 6.4).

Each record is indicated by an icon against the room:

Hazard: 

No Hazard: 

No Access: 

6.1.3 Room Filter

Every room in the block is automatically displayed, but the list can be filtered either by selecting the room **Type** from the pick list or entering the room code in the **Code** field. Once the criteria has been entered, tap on the **Filter** button and the room list will display the selection.

From the **Room List** it is possible to add **Hazard** details (see sections 6.2 – 6.4). It is also possible to add new rooms or to amend existing room data (see section 8).

To add a **Hazard** to a room, tap on a Survey on the **Survey List** then on the **Rooms** button to activate the **Rooms List** (shown in figure 6.1.4). Section 6.2 explains how to create a Hazard against a room.

To exit the **Room List** Tap on the **Ok** icon to return to the **Survey List**.

6.1.4 Hazard List

Highlight a survey and then tap on the **Hazards** button to activate the **Hazard List** (see figure 6.1.5). This list will show any hazards that have been recorded against the survey. It is also possible to add hazards from this screen (see section 6.2 on how to do this).

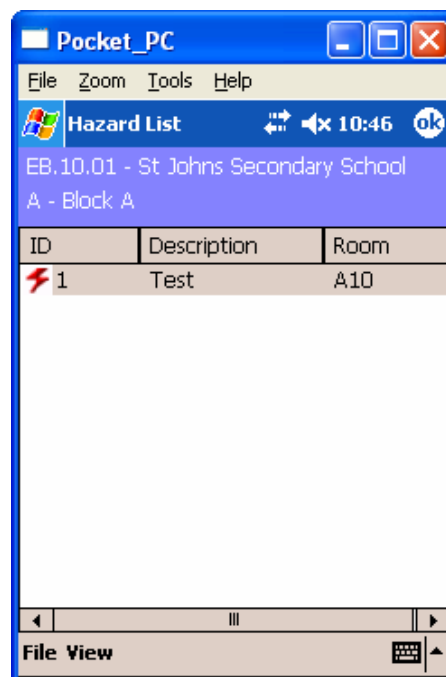


Figure 6.1.5

Each Hazard on the list can be identified by a  icon.

To exit the **Hazard List** tap on the **Ok** icon to return to the **Survey List**.

6.1.5 Deleting a Hazard Survey

To delete a **Survey** select a survey from the **Survey List**, then tap on the **File** menu on the toolbar. Choose the **Delete Survey** option from the menu. Alternatively hold down the stylus on a Survey on the **Survey List** and select **Delete Survey** from the Context Sensitive Menu (figure 6.1.6).

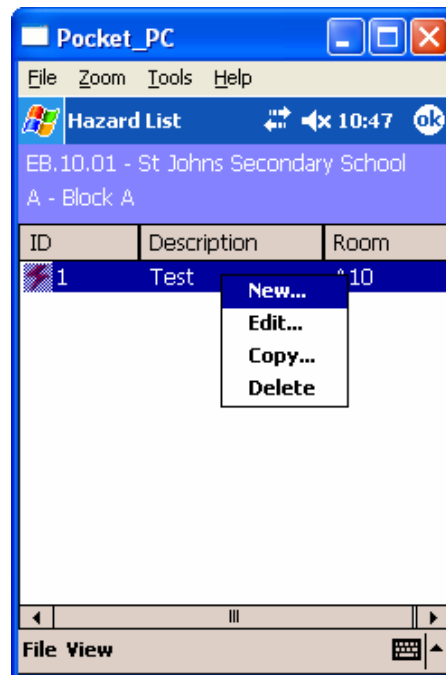


Figure 6.1.6

Note: Only surveys created on the handheld can be deleted. It is not possible to delete surveys that have been sent down to the handheld. See section 7.2 for creating surveys on the handheld.

6.2 Adding a Hazard

There are two ways to add a hazard to a survey on the handheld. The first way is to enter hazards on a room-by-room basis. The second is to add a hazard via the **Hazard List**:

To add a hazard to a room, tap on a survey on the **Survey List** then on the **Rooms** button to activate the **Rooms List** (shown in figure 6.1.4).

Tap on a room and then select the **New Hazard** button.

To add a Hazard via the Hazard List select the **Hazards** button from the **Hazard Survey List**, which will produce the **Hazard List** (shown in figure 6.1.5). Tap on the **File** menu on the toolbar and select **New**.

Either of the above options will display the **Hazard** screen (figure 6.2.1).

The image shows a screenshot of a handheld device screen displaying a form titled "Pocket_PC". The form has a menu bar with "File", "Zoom", "Tools", and "Help". Below the menu bar is a status bar showing a signal strength icon, a battery level icon, the time "10:48", and an "ok" button. The main form area is titled "Hazard" and contains several input fields: "Room" (a text box with a dropdown arrow), "ID" (a text box containing the number "2"), "Label Attached" (a checkbox), "Description" (a text box containing the word "Test"), "Status" (a dropdown menu showing "Presumed"), and "Position" (a text box with a dropdown arrow). At the bottom of the form is a tabbed interface with tabs labeled "Details", "Risk", "Material", "Sample", and "Action". The "Details" tab is currently selected. Below the tabs is a "Save" icon (a floppy disk) and a "Cancel" icon (a trash can).

Figure 6.2.1

6.2.1 Hazard Details

Select a room via the ellipsis button. Tap on a room and then the **Select** button. This is an optional field. If the Hazard has been added via the rooms list then this field will be automatically populated with the room. This field can be left blank and then the Hazard will be recorded against the block itself instead of an individual room.

The **ID** will be automatically populated by a number in sequence with any other Hazards that have been recorded. This is an optional field and can be amended or deleted.

Tap on the checkbox if a **Label** has been attached. Enter a **Description** of the hazard. This is an optional field.

The **Status** field will automatically be set to **Presumed** but may be changed by selecting another option from the pick list. Enter a **Position** if desired. This is an optional field.

Once the information is completed on the **Details** tab, tap on the **Save** icon at the bottom left of the screen.

6.2.2 Risk

Tap on the **Risk** tab to enter details regarding the Risk Assessment (figure 6.2.4).

The screenshot shows a handheld device screen with a blue title bar labeled 'Pocket_PC'. Below the title bar is a menu bar with 'File', 'Zoom', 'Tools', and 'Help'. The main window has a blue header with a Windows logo, the word 'Hazard', and a status bar showing a signal strength icon, a speaker icon, the time '10:59', and an 'ok' button. The main content area is divided into sections: 'Overall Assessment' with a value of '10' and a label 'B : Medium : 10 - 14'; a 'Comments' section with a text input field; a table with two columns, 'Category' and 'Sub Category'; and a 'Sub Cat' dropdown menu. The table lists several categories: 'Product Type' (AIB, mill boards, ...), 'Extent of damage/...' (Unsealed lagging ...), 'Surface Treatment' (Crocidolite), 'Asbestos Type' (>10 - <50m or >...), 'Location' (Use of Location), and 'Extent' (Use of Location). The 'Sub Cat' dropdown is set to '03 - >10 - <50m or >10 - <50m'. At the bottom, there is a tab bar with 'Details', 'Risk', 'Material', 'Sample', and 'Action'. The 'Risk' tab is currently selected. Below the tab bar is a status bar with a 'Save' icon and a 'Print' icon.

Category	Sub Category
Product Type	AIB, mill boards, ...
Extent of damage/...	Unsealed lagging ...
Surface Treatment	Crocidolite
Asbestos Type	>10 - <50m or >...
Location	Use of Location
Extent	Use of Location

Figure 6.2.4

Tap on a **Category** on the list and then choose a **Sub-Category** from the pick list. Selecting Sub-Categories is optional. Each category determines which Sub-Categories appear in the pick list.

The **Overall Assessment** at the top of the screen will be automatically populated dependent on the sub-categories that have been selected. Enter any **Comments** if necessary then tap of the **Save** Icon to save the details.

6.2.3 Material

Tap on the **Material** tab to enter additional details of the Hazard (see figure 6.2.3). All fields on this tab are optional.

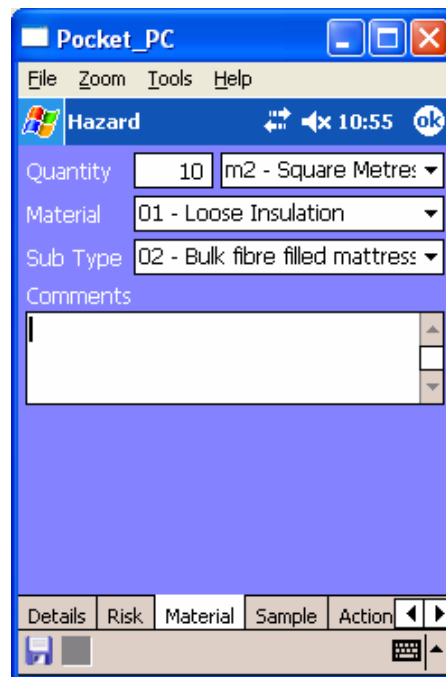
The image shows a screenshot of a handheld device screen displaying a software interface titled "Pocket_PC". The interface has a menu bar at the top with "File", "Zoom", "Tools", and "Help". Below the menu bar is a status bar showing a Windows logo, the word "Hazard", a double-headed arrow icon, a speaker icon, the time "10:55", and an "ok" button. The main area of the screen is divided into several sections. The first section contains a "Quantity" field with the value "10" and a unit pick list showing "m2 - Square Metres". Below this is a "Material" pick list showing "01 - Loose Insulation". Underneath the "Material" pick list is a "Sub Type" pick list showing "02 - Bulk fibre filled mattress". Below the "Sub Type" pick list is a "Comments" section with a large text area. At the bottom of the screen is a tab bar with five tabs: "Details", "Risk", "Material", "Sample", and "Action". The "Material" tab is currently selected. To the right of the "Action" tab are left and right arrow icons. Below the tab bar is a footer area with a save icon (floppy disk) on the left and a printer icon on the right.

Figure 6.2.3

Enter a **Quantity** and a unit of measure from the pick list if desired. Select a **Material** from the pick list. Only when a Material is chosen will the **Sub-Type** list be populated. The **Sub-Type** list is dependant on which option is selected from the **Material** pick list.

Enter any **Comments** if necessary. Once all data has been entered on the tab, tap on the **Save** icon.

6.2.4 Sample

The **Sample** tab (fig 6.2.2) allows data regarding the sample to be entered (if not taken on site then this data can be updated when the survey has been retrieved on to the PC).

The screenshot shows a handheld device screen with a blue header bar labeled 'Pocket_PC'. Below the header is a menu bar with 'File', 'Zoom', 'Tools', and 'Help'. A status bar at the top right shows a signal strength icon, a speaker icon, the time '10:54', and an 'ok' button. The main area is titled 'Hazard' and contains several input fields: 'Sample Required' is a dropdown menu set to 'Taken'; 'Sample ID' is a text box containing '6585'; 'Origin' is a large text box that is currently empty; 'Sampled on' is a date picker showing '9/21/2005'; and 'Sampled by' is a dropdown menu set to 'External Surveyors plc'. At the bottom of the screen is a tabbed interface with five tabs: 'Details', 'Risk', 'Material', 'Sample' (which is the active tab), and 'Action'. To the left of the tabs is a 'Save' icon (a floppy disk), and to the right is a 'Print' icon (a printer) and a 'Back' arrow.

Figure 6.2.2

All fields on this tab are optional, however the **Sample Required** field must have a value and is defaulted to **No** unless it is updated.

A **Sample Required** (Yes, No, Taken) can be selected via the pick list. Enter a **Sample ID** and **Origin** if desired. Choose a **Sampled On** date via the pick list, which will activate a calendar to allow a date to be chosen. A **Sampled By** can be chosen from the pick list. If any fields have been amended on this tab, tap on the **Save** button to save the changes.

6.2.5 Action

Tapping with the stylus on the **Action** tab will list any **Actions** recorded against the **Hazard** (see figure 6.2.5).

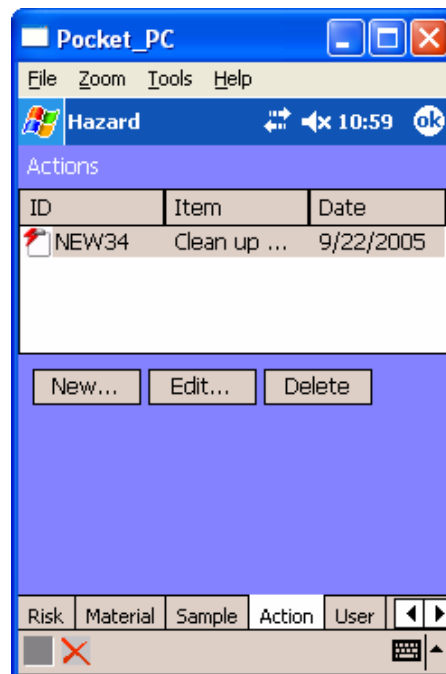


Figure 6.2.5

To add an **Action**, tap on the **New** button. This will activate the **Hazard Action** screen ([figure 6.2.6).

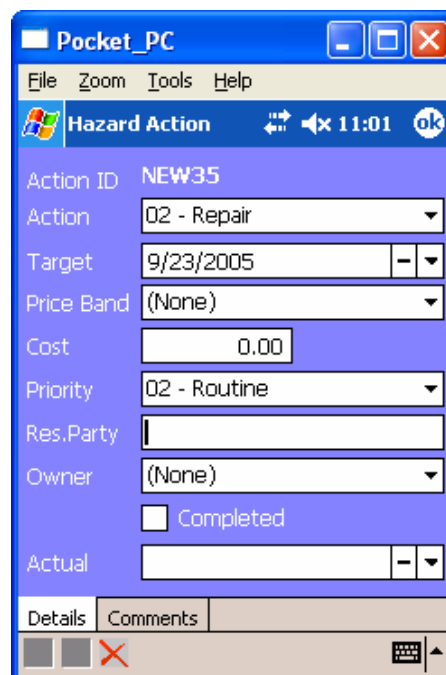


Figure 6.2.6

Select an **Action** from the pick list (mandatory). Select a **Target Date** from the pick list (optional). This will activate a calendar to choose a date (see figure 6.2.7).

The screenshot shows a handheld device screen with a form titled "Pocket_PC" and "Hazard Action". The form has several fields: "Action ID", "Action" (set to "02 - Repair"), "Target" (set to "9/23/2005"), "Price Band" (set to "September 2005"), "Cost", "Priority", "Res. Party", "Owner", and "Actual". A calendar for September 2005 is displayed, showing dates from 28 to 30. The date 21 is highlighted in blue, and 23 is highlighted in red. The "Actual" field is set to "Today: 9/21/2005".

S	M	T	W	T	F	S
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1
2	3	4	5	6	7	8

Figure 6.2.7

The remaining fields are optional. Select an appropriate **Price Band** from the pick list and enter a **Cost**, if necessary. Choose a **Priority**, enter a **Responsible Party** and choose the action **Owner** if desired.

It is also possible to enter details once the action has been carried out. Again these fields are entirely optional, but the **Completed** checkbox may be ticked and an **Actual** date for the completion can be selected from the pick list.

6.2.6 Comments Tab

Enter any comments regarding the action in the textbox on the **Comments** tab (figure 6.2.8).

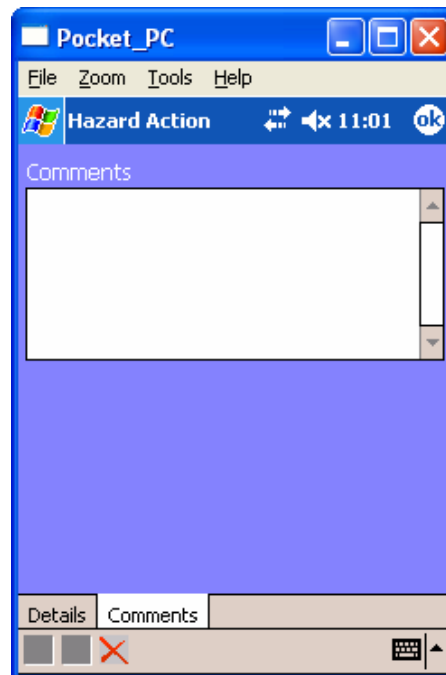


Figure 6.2.8

When all the required action details have been entered tap on the **Save** icon to save the screen and then tap on the **OK** button to return to the **Action** tab. When the action is saved it will be given an automatic **Action ID**, which will be updated when retrieved to the PC to comply with the ID sequence set on the PC.

6.2.7 Editing an Action

To edit an action, highlight the action from the list on the **Action** tab of the **Hazard** form. Tap on the **Edit** button and the **Hazard Action** form (shown in figure 6.2.5) will be activated. Make the necessary amendments then tap on the **Save** icon to save the changes. Tap on the **Ok** button to return to the **Action** tab of the **Hazard** form.

6.2.8 Deleting an Action

To delete an action, highlight the action from the list on the **Action** tab of the **Hazard** form. Tap on the **Delete** button and a message will ask to confirm the deletion. Select **Yes** and the action will be deleted.

6.2.9 User

The **User** tab on the **Hazard** screen lists all the user defined fields (figure 6.2.9). These can be created on the PC by the System Administrator.

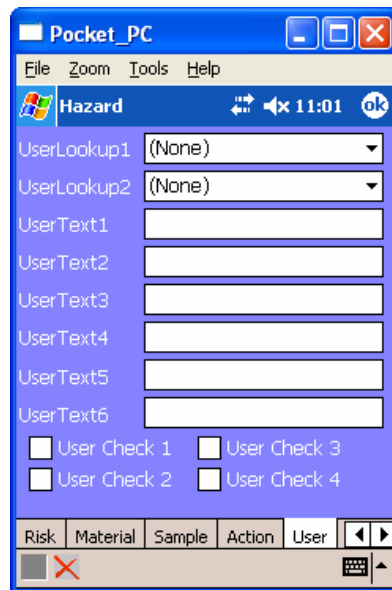
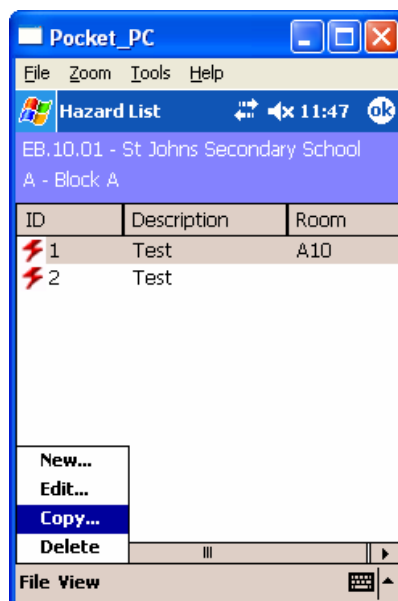


Figure 6.2.9

6.2.10 Copying a Hazard

It is possible to copy an existing Hazard Item to create a new one. This makes the process of entering Hazards quicker than entering a new Hazard each time.

To make a copy go to the **Hazard List** (from the Survey List screen) and highlight the **Hazard** that is to be copied. Select the file menu and tap on the **Copy** option (see fig 6.2.10). A Copy of the Hazard will then be displayed. Enter/Amend the data on the tabs as necessary. Once this copy has been saved it will be added as a new hazard along with the original on the Hazard list.



6.2.11 Editing a Hazard

To edit a hazard, select make sure the correct survey has been selected from the **Survey List** (shown in figure 6.1.2). Tap on the **Hazards** button to list all the hazards attached to the survey. To edit a hazard either tap on the **File** menu and select **Edit** or alternatively hold the stylus down on the hazard and select **Edit** from the context sensitive menu (figure 6.2.11)

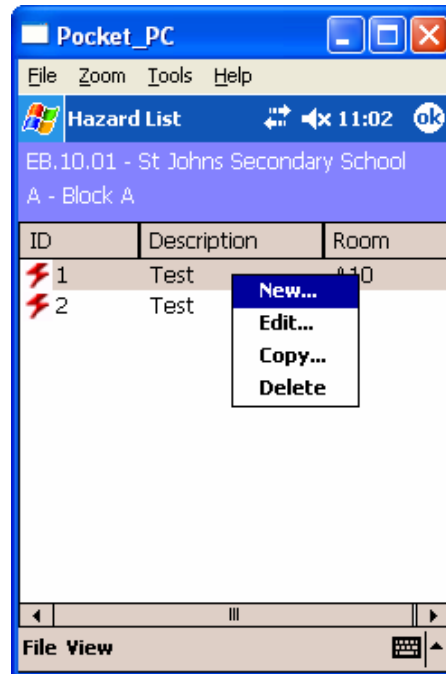


Figure 6.2.11

Either option will produce the **Hazard** screen. Amend the data on the appropriate tabs and then tap on the **Save** icon to save the form. Tap **Ok** to return to the **Hazard List**. Then tap of **Ok** again to return to the **Survey List**.

6.2.12 Deleting a Hazard

To delete a hazard, select make sure the correct survey has been selected from the **Survey List** (shown in figure 6.1.2). Tap on the **Hazards** button to list all the hazards attached to the Survey. To delete a Hazard either tap on the **File** menu and select **Delete** or alternatively hold the stylus down on the hazard and select **Delete** from the context sensitive menu (figure 6.2.10). A message will ask to confirm deletion. Say **Yes** and the **Hazard** record will be deleted.

A Hazard can also be deleted at any stage of recording the hazard. When on the **Hazard** screen a **Delete** icon will be apparent on the toolbar to the right of the **Save** icon (shown in Figure 6.2.8). Tap on the **Delete** button during any stage on the **Hazard** screen and a message will ask to confirm deletion. Say **Yes** and the hazard record will be deleted.

6.3 Adding No Hazard Records

It may be possible when carrying out the survey to identify rooms where it is certain that there is no hazard. To add a **No Hazard** record highlight the survey on the **Survey List** screen and select the **Room(s)** button (as shown in figure 6.1.2). Tap on the room with no hazard then tap on the **No Hazard** button to activate the **No Hazard** screen figure (6.3.1).

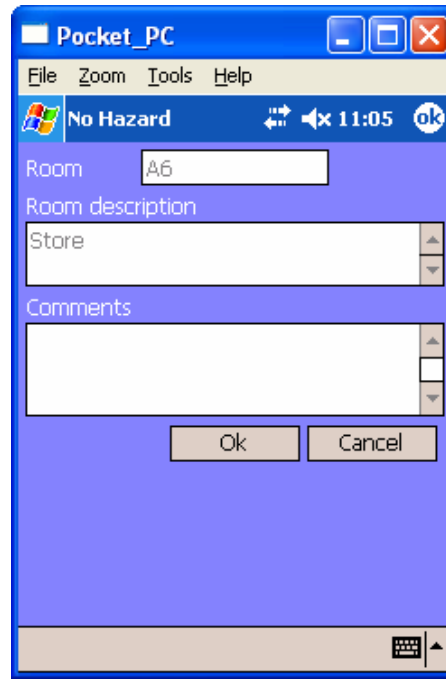


Figure 6.3.1

The **Room** code and **Room Description** will be automatically populated. Enter any **Comments** if desired. This is an optional field. Tap on the **Ok** button on the screen, and it will return to the Room list. A **No Hazard** record is indicated by the following icon .

6.3.1 Deleting a No Hazard record

To delete a **No Hazard** record, tap on the room from the list. Then either tap on the **File** menu and select **Clear Status** or hold down the stylus and select **Clear Status** from the context sensitive menu. A message will ask to confirm the deletion. Say **Yes** and the status of **No Hazard** on the room will be deleted.

Note: If the Survey had any **No Hazard** records against it before it was sent down to the handheld, then it will be noted on the **History** tab on the PC that the **No Hazard** record has been deleted on the handheld (see section 4.4).

6.4 Adding No Access Records

It may be possible when carrying out the survey to record rooms where there is no access. To add a **No Access** record highlight the survey on the **Survey List** screen and select the **Room(s)** button (as shown in figure 6.1.2). Tap on the room with no access then tap on the **No Access** button to activate the **No Access** screen figure (6.4.1).

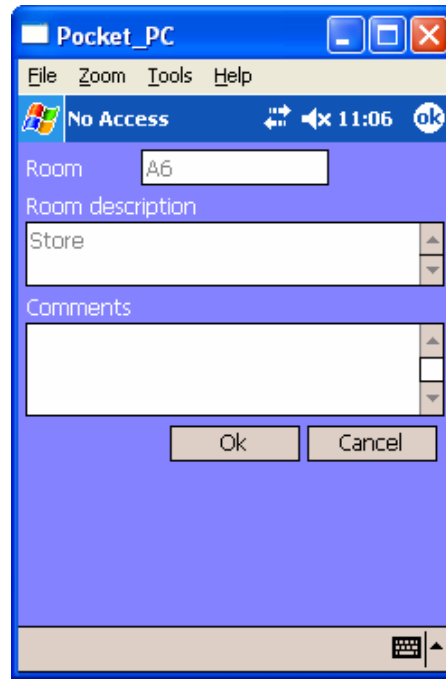


Figure 6.4.1

The **Room** code and **Room Description** will be automatically populated. Enter any **Comments** if desired. This is an optional field. Tap on the Ok button on the screen, and it will return to the Room list. A **No Access** record is indicated by the following icon 🚫.

6.4.1 Inaccessible Areas

It is also possible to record areas within a room, such as a locked cupboard on the survey.

Highlight the survey from the **Room(s)** list and then select the **Room(s)** button. Tap on the file menu and select **Inaccessible Areas**. This will activate the **Inaccessible Areas** screen (figure 6.4.2).

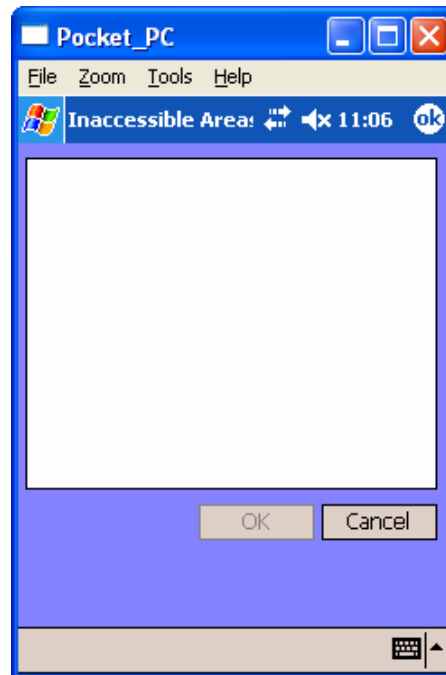


Figure 6.4.2

Enter the details as appropriate in the textbox then tap on the **OK** button. This will return to the **Room(s) List**.

Alternatively, highlight the survey from the **Survey List** screen then tap on the **Details** button. This will activate the **Survey Detail** screen. Tap on the **Comments** tab and complete the **Inaccessible Areas** textbox as necessary.

Entering the **Inaccessible Areas** data in both of the above locations will be transferred to the other.

6.4.2 Deleting a No Access record

To delete a **No Access** record, tap on the room from the list. Then either tap on the **File** menu and select **Clear Status** or hold down the stylus and select **Clear Status** from the context sensitive menu. A message will ask to confirm the deletion. Say **Yes** and the status of **No Access** on the room will be deleted.

Note: If the Survey had any **No Access** records against it before it was sent down to the handheld, then it will be noted on the **History** tab on the PC that the **No Hazard** record has been deleted on the handheld (see section 4.4).

7 Blocks

7.1 Amending Block Details

When performing a hazard survey, it is possible to amend the details of the block that is being surveyed.

To edit a block, tap on the block from the **Survey List**, then tap on the File menu and choose the **Edit Block** option (see figure 7.1.1).

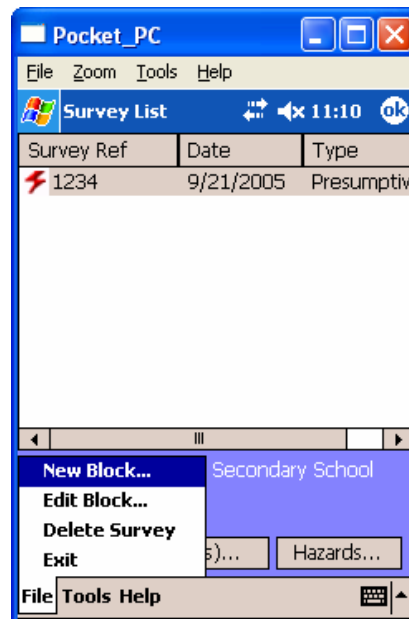


Figure 7.1.1

The **Block Details** screen will be activated (see figure 7.1.2). The screen will show the details of the Block, which were sent down to the handheld when the survey(s) were transferred.

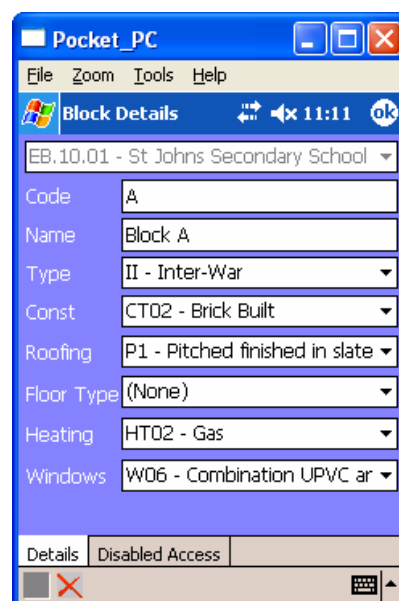


Figure 7.1.2

Amend the details as necessary. Tap on the **Save** icon to save the changes, then on the **Ok** icon at the top right of the screen to return to the Survey List.

Any changes will be retrieved into the main database on the PC (see section on Retrieving Surveys).

7.2 Creating a New Block

When on site with the handheld, it may be necessary to create a **New Block** to survey. To do this tap on the **File** menu and then on **New Block** on the **Survey List** tab (shown in figure 7.1.1). This will activate the **Block Details** form (shown in figure 7.1.2).

Enter a **Code** and a **Name** for the Block. These are both mandatory fields. Select the remaining fields from the pick lists, if desired. All these fields are optional.

Tap on the **Save** icon to save the new block and then on the **Ok** button to return to the **Survey List**. When **Ok** is tapped, a message will confirm that a new survey has been created and it will auto-number this survey with a survey ref. Tap the **Ok** button on the message box. The **Survey Ref** can be changed on the PC, once the survey(s) have been retrieved (see section on Retrieving Surveys).

7.2.1 Surveying a New Block

There are two ways to add a hazard to a new block:

If hazards are to be recorded against rooms, the rooms will need to be created before hazards can be added. Hazards can then be added via the rooms list (sections 8.2 and 8.3 explain how to add rooms via the Room(s) List).

Alternatively, Hazards can be added via the **Hazards** button on the **Survey List** and either assigned to a room or against the Block (section 6.2 explains how to do this).

Either Way, it is mandatory that the **Survey Details** are entered before a Hazard is created against a new Block. To ensure that this data is entered a message will be produced and a Hazard cannot be added until the required information (**Survey Type** and **Surveyor**) have been inputted. See section 6.1 on adding the **Survey Details**.

For adding **No Hazard** and **No Access** records against a new block, rooms must be created, as it is mandatory to select a room when adding either of these records.

7.3 Deleting a Block

It is not possible to delete an existing block on the handheld. If a new block is created (see above) then it can be deleted by deleting the survey (see section 4.6 on how to do this).

Note: To delete a survey created on the handheld, records against the block (new **Rooms**, **Hazard**, **No Hazard** and **No Access** records) must be deleted first.

8 Rooms

8.1 Amending Room Details

When performing a hazard survey, it is possible to amend the details of the block that is being surveyed.

To amend the details of a room tap on the **Room(s)** button on the **Survey List** screen (shown in figure 6.1.2). This will activate the **Room List** (shown in figure 6.1.4).

Tap on a room then either select **Edit Room** from the **File** menu or hold down the stylus on a room on the list and select **Edit Room** from the context sensitive menu. Either option will activate the **Room Details** screen (figure 8.1.1).



Figure 8.1.1

Amend the details as appropriate then tap on the **Save** icon to save the changes. Tap on the **Ok** button to return to the **Room List**.

8.2 Creating a New Room

When on site with the handheld, it may be necessary to create a new room to record hazard details against. Either select **New Room** from the **File** menu or hold down the stylus on a room on the list and select **New Room** from the context sensitive menu. Either option will activate the **Room Details** screen (shown in figure 8.1.1).

Enter a **Code**, **Description** and **Room Type**. These are mandatory fields. Enter a **Floor Area** is desired. This is optional. Save the room by tapping on the **Save** icon, then tap on the **Ok** button to return to the **Room List**.

8.3 Creating a New Room Range

If there are many rooms to create for the block that is to be surveyed, the **New Rooms Range** allows multiple rooms of the same type to be created. To create a new room range, either select **New Room Range** from the **File** menu or hold down the stylus on a room on the list and select **New Room Range** from the context sensitive menu. Either option will activate the **New Room Range** screen (figure 8.3.1).

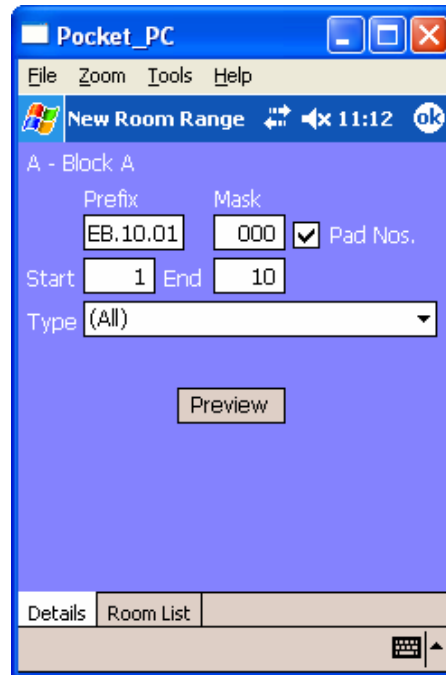


Figure 8.3.1

The **Prefix** field will be automatically populated with the **Code** for the **Building** and the **Mask** field with three zeros. This will mean that any rooms that are created in this range will all have a code beginning with the prefix and then be three digits long (e.g. ABC001).

The **Prefix** and the **Mask** fields can be changed. Only zeros can be entered into the **Mask** field. The **Pad Nos.** checkbox is automatically ticked to indicate that the **Mask** is in use. If the mask is not required un-tick the box. The **Prefix** can also be deleted if required.

Enter a **Start** and an **End** number for the range of rooms you wish to create. These fields will be automatically populated with 1 and 10 respectively.

Select a **Type** from the pick list. This is a mandatory field and will be applied to all the rooms created in the range. The types can be amended if necessary once the rooms have been created (see section 8.1).

When satisfied with the selection, tap on the **Preview** button. This will activate the **Room List** tab and show a preview of the rooms (figure 8.3.2). To create the Rooms tap on the **Create Room(S)** button. The selection can be changed by tapping on the **Details** tab.

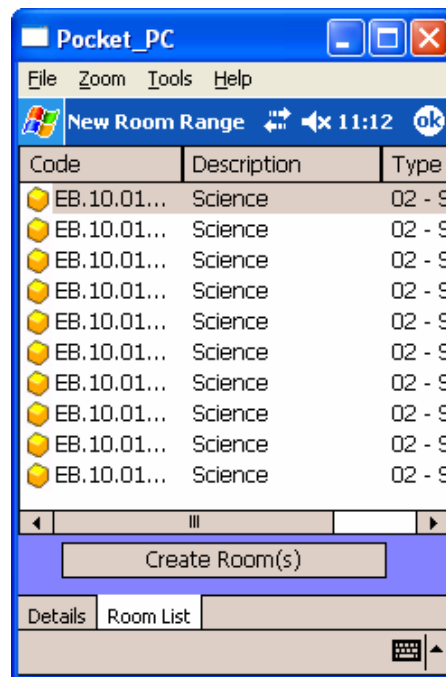


Figure 8.3.2

When the rooms are created a message will confirm how many rooms have been added. Tap on the **Ok** button to return to the **Room List** and the new room(s) will be added. The room details can then be amended if necessary (see section 8.1).

8.4 Deleting a Room

A room can only be deleted if it has been created on the handheld. To delete a room either select **Delete Room** from the **File** menu or highlight a room hold down the stylus and select **Delete Room** from the context Sensitive menu.

9 Backing-Up and Restoring Data on the Handheld

There are two ways of backing up and restoring data on the handheld: on the file store of the handheld, or on an external memory card (e.g. Secure Digital or Compact Flash Jacket).

Both operate using the same method.

Hazard data can be backed up or restored via the Tools menu on the Survey List screen (shown in figure 6.1.2).

9.1 Backing-Up the data

Select **Backup** from the **Tools** menu on the **Survey List** screen. This will load the **Backup Data** screen (figure 9.1.1)

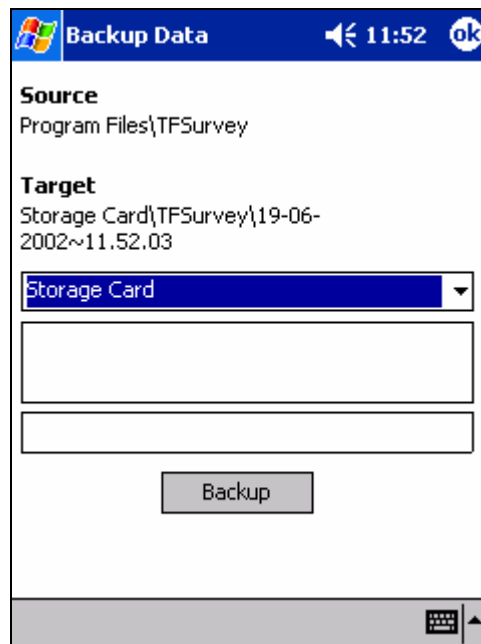


Figure 9.1.1

Select an option (e.g. **File Store** or **Storage Card**) from the pick list and press **Backup**. Once the backup is complete a warning message will be displayed indicating that the backup was successful. Note that 3 files will be saved but stored under one file name.

Once the data has been backed up it will be stored in the File Store or external memory card and given the date and time that the backup took place. Click **OK** to return the Hazard program.

9.2 Restoring Data

Select **Restore** from the **Tools** menu on the **Survey List** screen. This will load the **Restore Data** screen (figure 9.2.1).

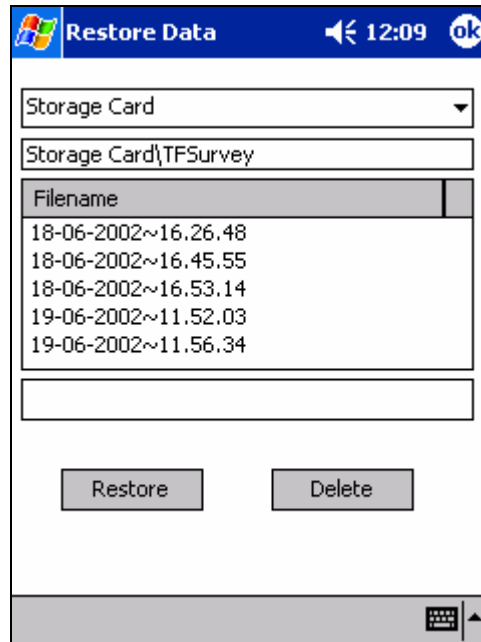


Figure 9.2.1

Select **Storage Card** from the pick list. A list of all data that has been backed up will be displayed. Highlight the data you wish to restore and press the **Restore** button. A warning message will be displayed asking you to confirm you wish to overwrite any existing data on the handheld. Click **Yes** to proceed.

A warning message will be displayed confirming that the data (consisting of 3 files) has been successfully restored. Click **OK** to return the Hazard program.

To remove data from the file store or memory card highlight the data and press the **Delete** button.

10 Retrieving a Hazard Survey

Before retrieving it is important to make sure that the **Hazards** application has been exited on the handheld before the transfer takes place.

To Retrieve the Hazard Surveys from the handheld, select the **B – Issued** folder on the PC. With the mouse in the right hand pane, right click and select **Retrieve From Handheld** from the context sensitive menu (figure 10.1).

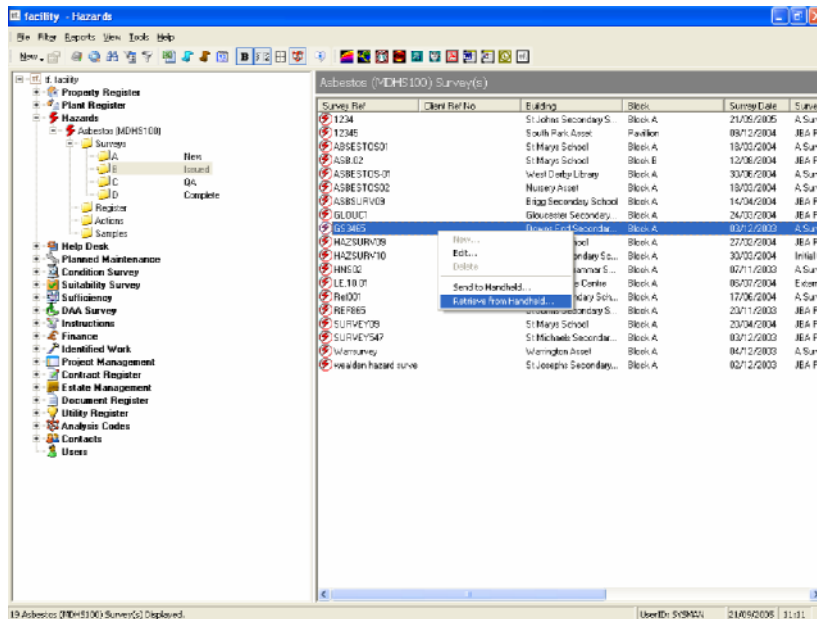


Figure 10.1

This will activate the first step of the retrieval wizard (figure 10.2).

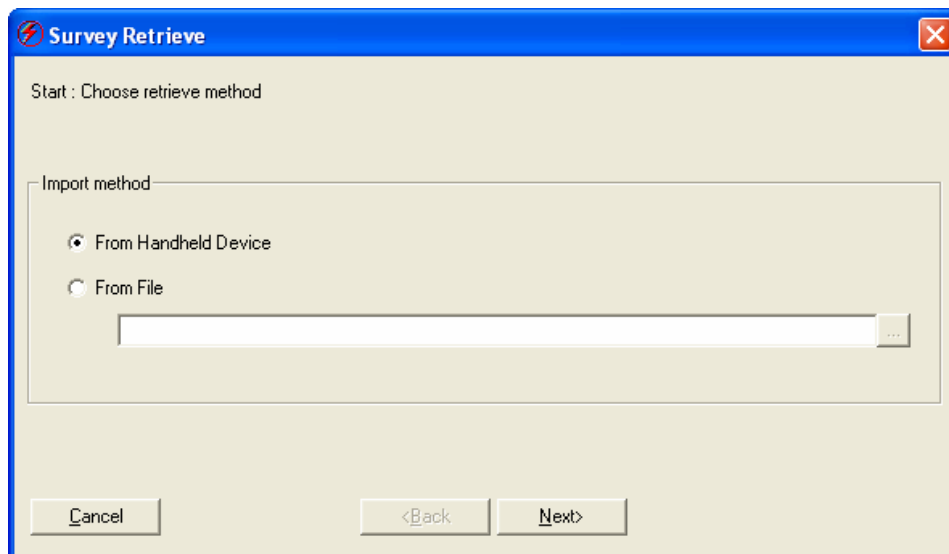


Figure 10.2

It is possible to retrieve the data from a file if using the TF web transfer program, however when retrieving from the handheld choose the default option (**From Handheld Device**). Click on the **Next** button to retrieve the surveys.

Check the handheld is connected properly and then select the **Next** button. The retrieve process will begin on both the PC and the handheld.

When the exporting process has finished the next step will be activated (figure 10.3).

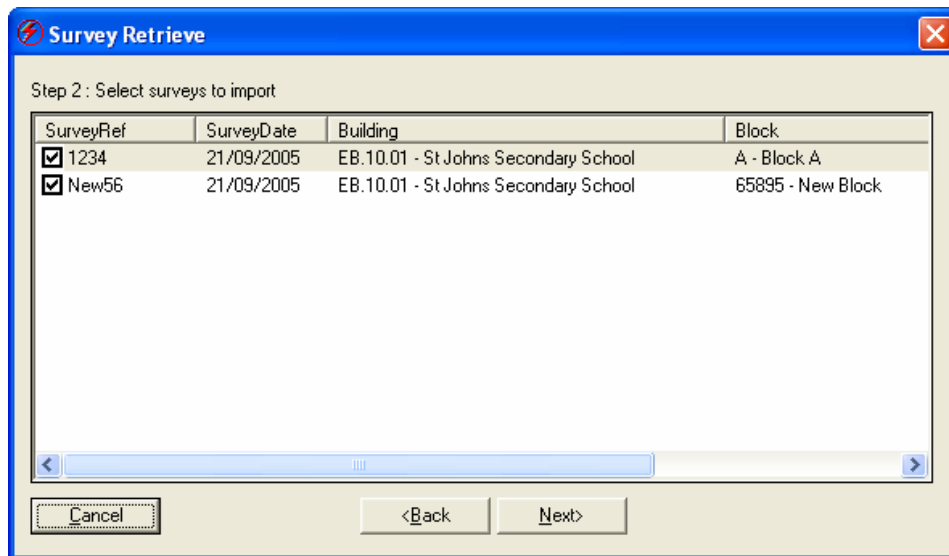


Figure 10.3

Step 2 shows all the surveys found on the handheld. This includes any new blocks that have also been created, but may not have been surveyed. Any new blocks created will be added to the property register. Each survey will have a tick next to it. If you don't wish to import a survey into the database on the PC, un-tick the checkbox and it won't be imported.

When new surveys are created on the handhelds they are given an auto-number as a **Survey Ref**. If two or more handhelds have been used to create new blocks they may have been assigned the Same Survey Ref on the handhelds. If this is the case, when the surveys from both handhelds are retrieved, if a **Survey Ref** is a duplicate it will be given a new survey ref. A message will inform you of the new survey ref. It can then be changed in the survey on the PC, if necessary.

Click on **Next**. The next Step will show any new blocks created or amended on the handheld (figure 10.4)

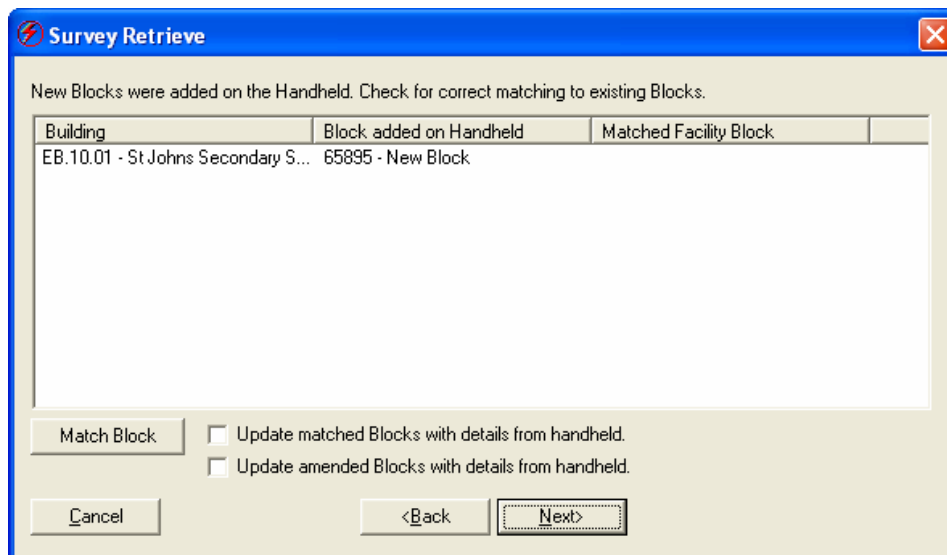
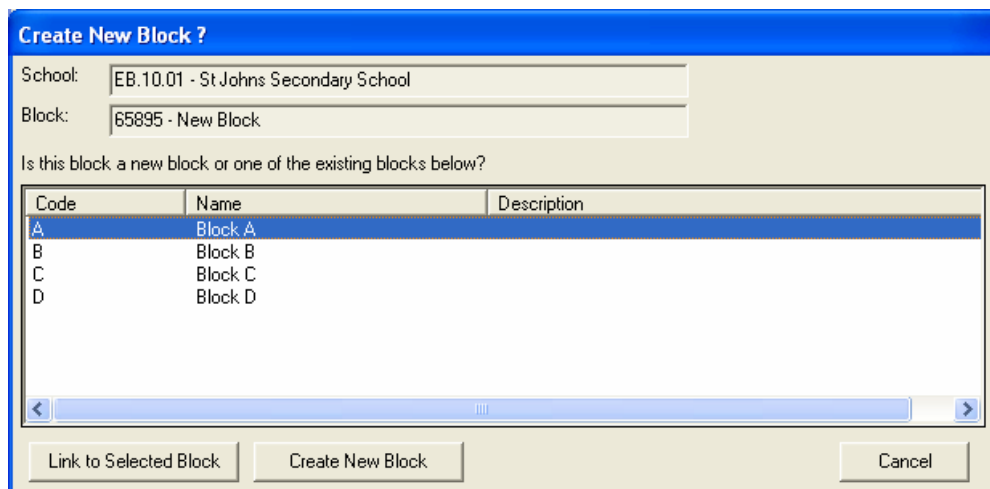


Figure 10.4

There is the option to match any new blocks created on the handheld to an existing block in the database on the PC (**Match Block**). Alternatively select the **Create New Block** button if it is a new block or cancel the screen shown below and the block will be added as a new block once the **Next** button is pressed.



Return to the Block list to be added and click on the **Update Matched Blocks** checkbox to import the changes and on the **Update Amended Blocks** if you wish to import any blocks where the details have been amended.

Click on **Next**. The next Step will show any new rooms created or amended on the handheld (figure 10.5)

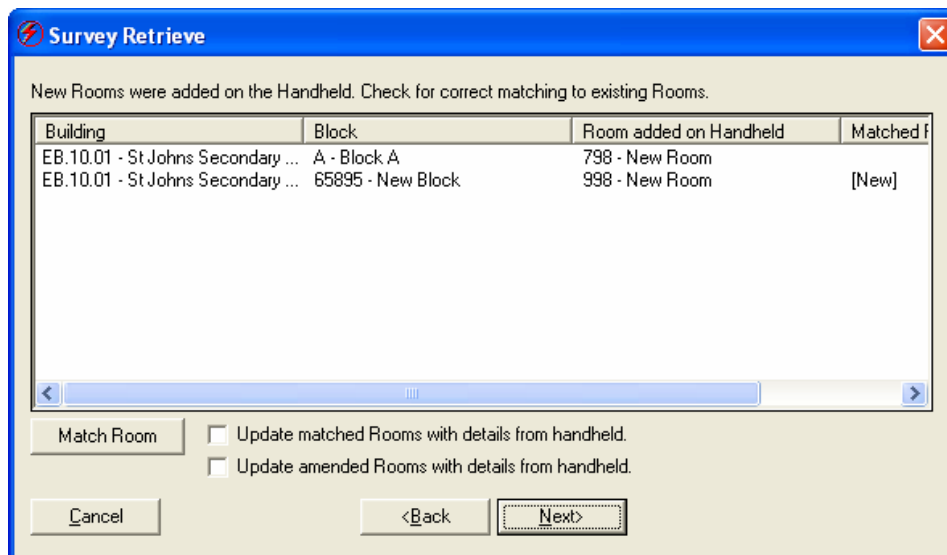
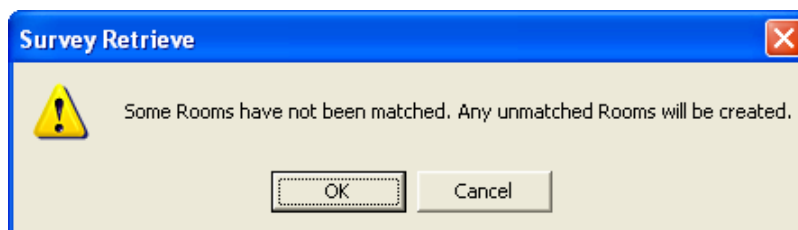


Figure 10.5

Again there is the option to match any new rooms created on the handheld to an existing room in the database on the PC. To do this select a room and then the **Match Room** button. An additional form will be activated and will enable you to match to an existing room.

If Rooms are not matched to existing rooms they will automatically be created as new rooms:



Tick on the **Update Matched Rooms** checkbox to import the changes and on the **Update Amended Rooms** if you wish to import any rooms where the details have been amended.

Click on **Next** and the data will be imported into the database on the PC (Figure 10.6).

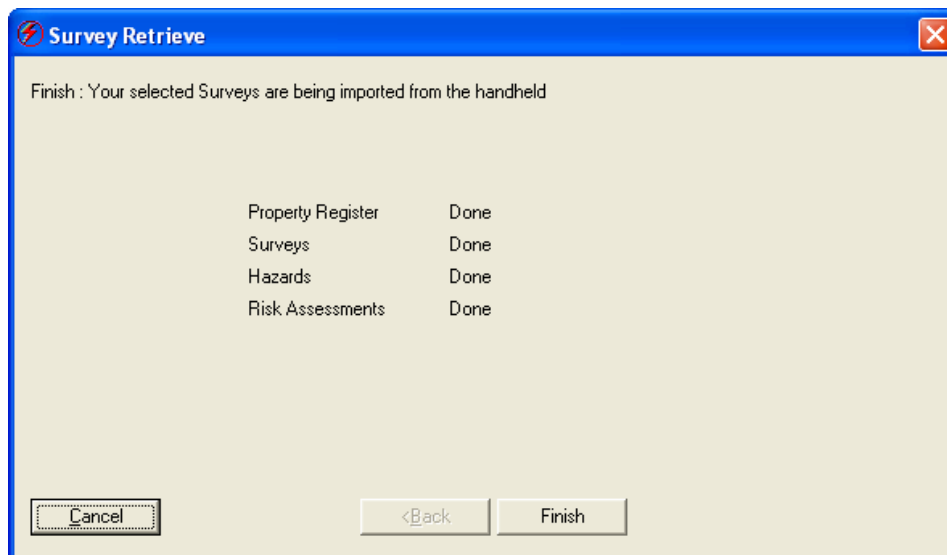


Figure 10.6

Press **Finish** once all the options have completed (**Done**). If any blocks or rooms have been added or amended, check these details in the Property Register. Also check the Surveys (the survey refs may need updating if there were new surveys created on the handheld).

Once on the PC the records collected via the handheld will be displayed on the appropriate tabs (see section 4 and the **Hazards Module** Manual for more details). The data can be checked and amended on the PC after the survey(s) have been retrieved.

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