

9.

AIR MONITORING

9.1 Introduction

This section describes how you can record the data for Air Monitoring projects, including 4-Stage Clearance surveys.

The following topics are covered in this section to help you complete projects of this type:

- understanding the process
- starting the 4-Stage Monitor
- preparing the project
- refreshing the Pocket PC files
- requesting documents
- recording inspection details
- updating the project data in Tracker
- producing the certificates in Tracker.



As your terminology for air testing may be different, please note that your Pocket PC screen layouts and wording may vary slightly from those shown.

9.2 Understanding the process

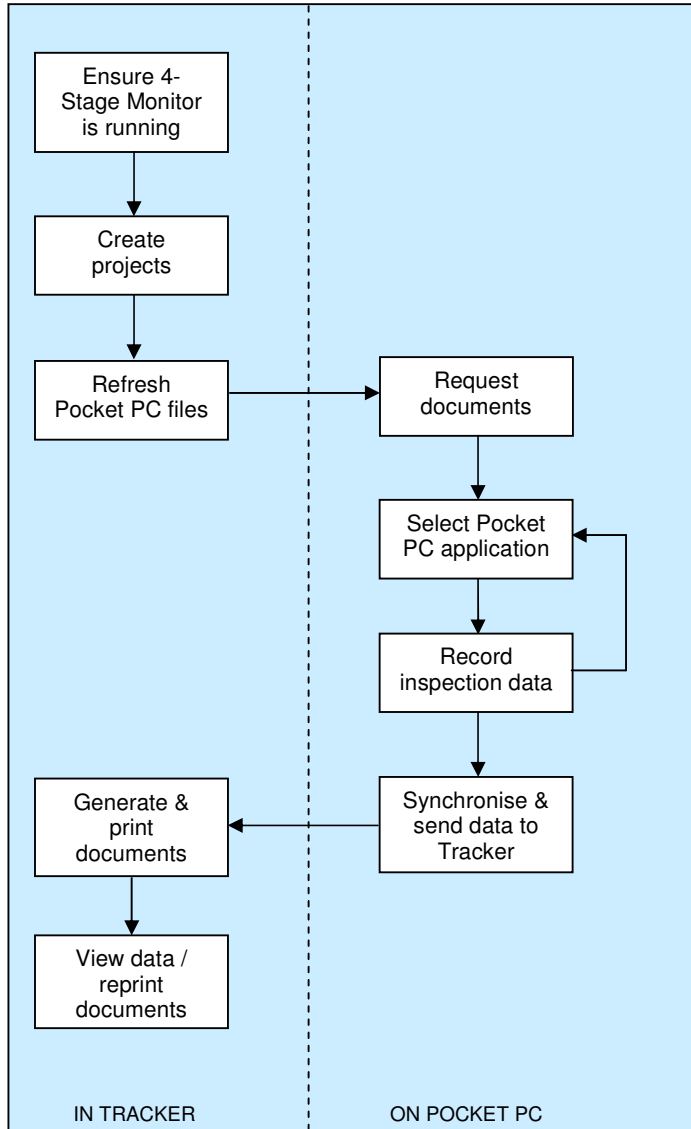
Once the basic project details have been created in Tracker and the Pocket PC applications updated, you can record the data for Air Monitoring projects quickly and easily, on-site, on your Pocket PC.

The first stage in recording the data is to request the documents you require from the server. These documents may for example include a 4-Stage Clearance, some Air Tests and a Smoke Test. The documents must be requested from the server so that a unique reference number is assigned to each document. The 4-Stage Monitor controls this process, sending and receiving documents for a project.

Then on your Pocket PC you can answer the questions and enter comments to complete the data required for each document in turn. There are usually a number of different screens to complete. For example, for the 4-Stage Clearance there is a screen for general project/certificate information and also one screen for each of the four stages. Each screen leads you on to the next, but also allows you to move backwards and forwards to other screens as you wish.

When you have completed all the necessary documents, you can then send the data, at your convenience, to Tracker to update the server with data from the Pocket PC. Tracker acts as the central store for the project data and provides you with the facility to print the certificates.

The following diagram summarises the tasks that you perform to complete this type of project:



9.3 Starting the 4-Stage Monitor

The 4-Stage Monitor is responsible for sending and receiving the documents for a project. It must be running on the machine where both the Pocket PC server is running and also a version of Tracker (Tracker PPCC) that is primarily used for monitoring and controlling information to and from the Pocket PCs.

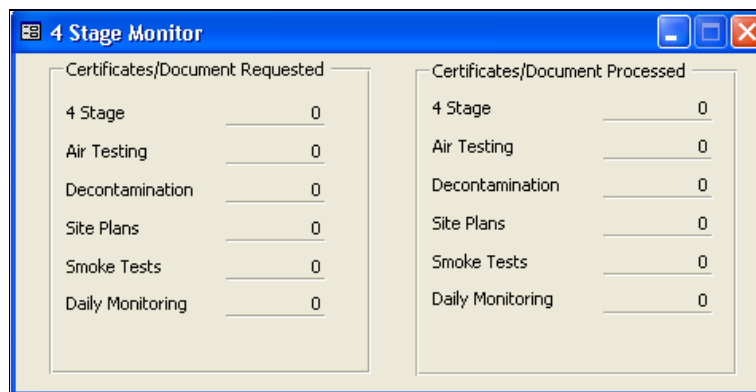
The 4-Stage Monitor runs in the background performing the following:

- monitoring requests from surveyors/consultants for new documents with unique reference numbers
- receiving the completed documents from the surveyors'/consultants' Pocket PCs
- processing the received data so that it is ready for Administration staff to produce the required certificates.

The 4-Stage Monitor can be automatically loaded or you can start it manually from a menu option. To start it manually:

1. Select option 3, *Projects*, from the Main menu.
2. Select option 4, *Load 4 Stage Monitor*, from the Projects menu.

The 4-Stage Monitor is displayed. The screen tells you the number of documents sent and received during the session.



9.4 Preparing the project

The first stage in completing a project of this type is to set up the project in Tracker. This involves assigning a number to the project, specifying its type (4-Stage Clearance) and recording client, site and contractor information. The project tabs for Milestones, Addresses, Financials/Planning, Staff and Documents also need to be completed.



Refer to Section 4.2, Creating a new project/job, for details on how to set up the project in Tracker.

The following screen shows a 4-Stage Clearance project displayed on the Projects screen. The client, site and contractor information is entered on the Certificate tab.

The screenshot shows the 'Projects' window in Tracker. The 'Certificate' tab is selected, displaying the following information:

Project Number:	B-11111	Project Manager:	Mr J Horsfall
Project Type:	4 Stage Clearance	Team Leader:	Mr L. Araji
Client ID:	155	PD:	
Site Name & PC:		Site Contact Name:	John Smith

Below the main form, there are tabs for Milestones, Addresses, Financials/Planning, Staff, Documents, 4 Stage Clearance, and Notes. The '4 Stage Clearance' tab is active, showing a list of jobs with columns for Job Number, Date, Arrival Time, Analyst, and Pages In Report. The first job is highlighted with a yellow background.

Client Name and Address: John Smith Ltd, 16 The High Street, Telford

Site Address: John Smith Ltd, 16 The High Street, Telford

Postcode: TF1 8AA, Tel: 01952 123456

Contractor Name and Address: B J Johnson, Unit 1a - Staffs Park, Telford

Postcode: TF11AA, Tel: 01952 654321

Areas to be assessed? All Areas.

Record: 1 of 1 (Filtered)

You will require the Project Number for the project in order to request documents from the Pocket PC when you are on-site.

9.5 Refreshing the Pocket PC files

After setting up the project(s) in Tracker, the Pocket PC files must be updated to ensure the surveyor/consultant gets the most up-to-date lists. Each project is checked and changes to lists (buildings, staff, documents, etc) are detected to update the available Pocket PC applications for 4-Stage Clearance projects. The next time the surveyor/consultant synchronises with the server they will get the updated lists.

This step need not be completed immediately after setting up a project, but it must be done before the surveyor/consultant submits the request for documents.

To refresh the Pocket PC files:

1. Select option 3, *Projects*, from the Main menu.
2. Select option 8, *Refresh Pocket PC Files*, from the Projects menu.

A message is displayed informing you when the files have been updated.

9.6 Requesting documents

When you are on site and ready to start recording inspection details on your Pocket PC, you first need to request the documents that you want to complete from the server. This enables the unique reference numbers to be created and documents to be identified.

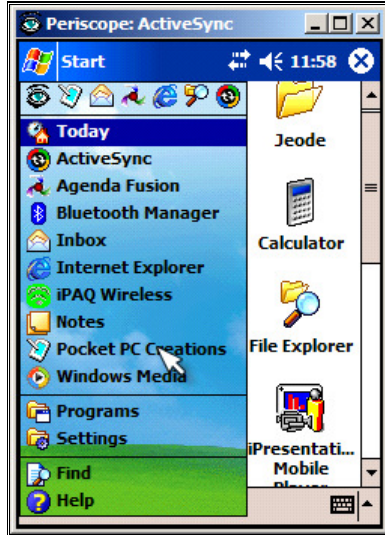


If you attempt to create any of the documents manually on the Pocket PC, a warning is displayed reminding you to request a document from the server.

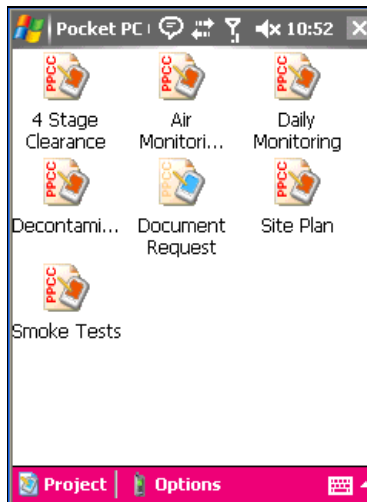
The Pocket PC uses a piece of software called Pocket PC Creations.

To start Pocket PC Creations and request documents:

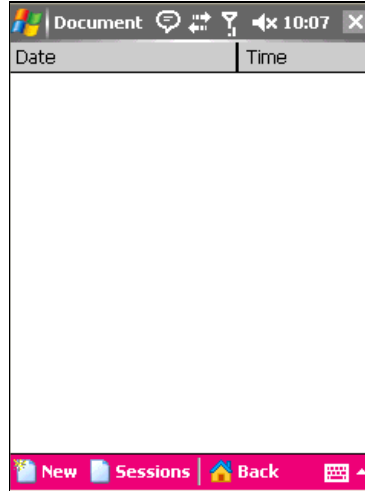
1. Click the Start button at the top of the Pocket PC screen.
2. Select *Pocket PC Creations* from the drop-down menu if shown, or click 'Programs' and then choose its icon:



If Pocket PC Creations does not appear to start, it may already be running 'behind' the main screen. To check this, click Start|Settings|Memory|Running Programs and activate it if necessary from the list of software that is already running.



3. Click the Document Request application to load it on the Pocket PC.



4. Click on the New button at the bottom of the screen to display the Document Request screen on which you can specify the documents you require.

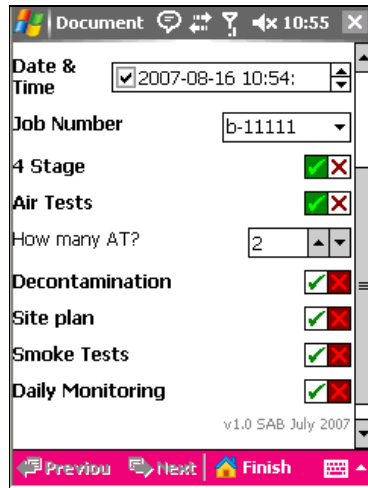
5. Enter your name in the **Analyst's Name** field.
6. Leave the current date and time displayed in the **Date & Time** field to show when the document request was made.
7. Use the drop-down list on the **Job Number** field to select the required 4-Stage Clearance project number.

Only 4-Stage Clearance projects are available from the list.

You can now specify which documents you require by ticking the appropriate boxes.

8. Tick the box next to each document that you require.

If you require Air Tests, you can specify the number of Air Tests needed. The following screen shows an example with a 4-Stage document requested and two Air Tests.



Document 10:55

Date & Time: 2007-08-16 10:54

Job Number: b-11111

4 Stage:

Air Tests:

How many AT?: 2

Decontamination:

Site plan:

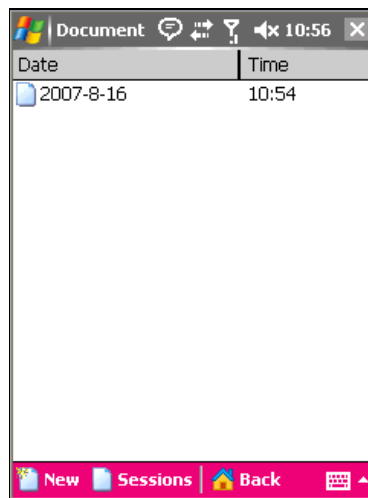
Smoke Tests:

Daily Monitoring:

v1.0 SAB July 2007

Previous Next Finish

9. Click on the Finish button at the bottom of the screen.
The request is displayed ready for sending.

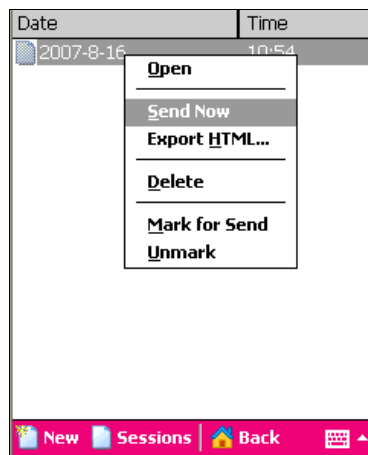


Document 10:56

Date	Time
2007-8-16	10:54

New Sessions Back

10. Press and hold on the request item to display a menu.



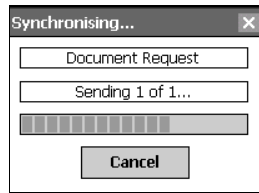
Date	Time
2007-8-16	10:54

- Open
- Send Now
- Export HTML...
- Delete
- Mark for Send
- Unmark

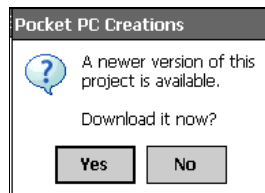
New Sessions Back

- Click on *Send Now* on the menu.

The document request is sent.



If any updates are available a further message is displayed to inform you. Always select **Yes** if you are offered newer versions or updated data.



Once the document request is sent and any updates downloaded, a blank screen is displayed on the Pocket PC.

On the 4-Stage Monitor screen on the server, the numbers are updated to reflect the documents requested, as shown on the following screen.

Certificates/Document Requested		Certificates/Document Processed	
4 Stage	1	4 Stage	0
Air Testing	2	Air Testing	0
Decontamination	0	Decontamination	0
Site Plans	0	Site Plans	0
Smoke Tests	0	Smoke Tests	0
Daily Monitoring	0	Daily Monitoring	0

- Click Back on the Pocket PC to return to the Pocket PC Creations screen.

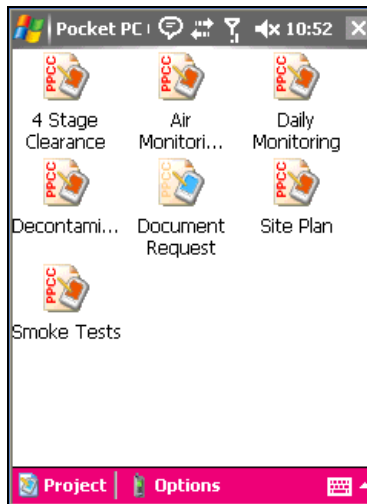
You can now record the inspection details.

9.7 Recording inspection details

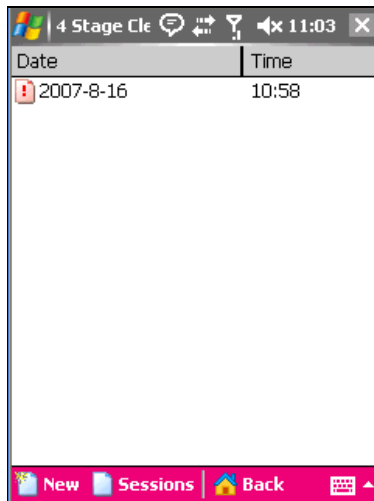
Once the required documents have been requested, you can complete the inspection details on the Pocket PC. You need to select the Pocket PC application appropriate to the documents requested and then fill in the details. You then send the completed documents back to Tracker.

To record inspection details:

1. From the Pocket PC Creations screen on the Pocket PC, select the application appropriate to one of the documents requested.

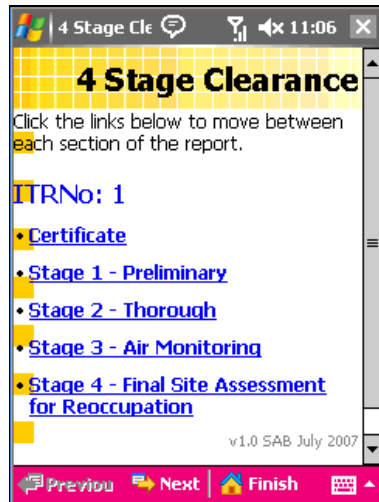


The appropriate application is loaded on the Pocket PC and any documents requested are listed. The screens in this example assume a 4-Stage Clearance document has been requested.



2. Click on the item to display the pages of the document to complete.

The first page is displayed, giving general instructions and displaying links to the pages that you must complete for a 4-Stage Clearance report.



The ITR Number displayed is the automatically-generated Internal Tracking Reference Number.



You are recommended to work through the links in the displayed order so as not to miss any required information.

- Click on the first link, [Certificate](#), and amend the general project information if necessary.

The details displayed come from the Certificate tab on the Projects screen in Tracker.

The information required includes the project number, date, your name, arrival time on site, client details, contractor details and site details. Scroll down the page to ensure you have entered all the required information.

- Move on to the next required page by clicking the Next button at the bottom of the screen.

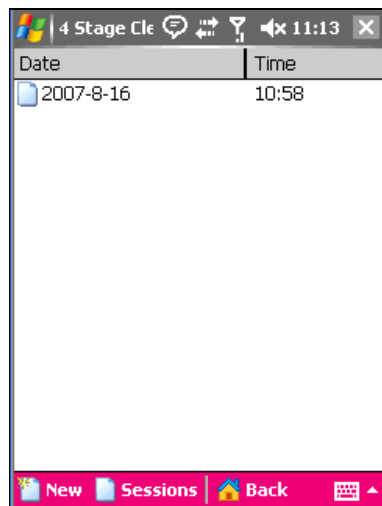
5. Record the inspection data for each of the subsequent pages in turn.

This may take the form of answering Yes/No questions, entering comments, completing signature boxes, importing photographs etc.

If you are recording inspection data for a 4-Stage Clearance and you record a 'Fail' for any one stage, you do not need to complete any remaining stages. In order to pass Stage 3 of the 4-Stage Clearance project, at least one Air Test must be performed and passed. Details of the equipment used and results obtained are recorded under Air Monitoring on the Pocket PC.

6. When you have completed the last page, or recorded a fail for a stage, click the Finish button at the bottom of the screen.

Any completed documents are listed on the screen.



The document is now ready for sending back to Tracker. You can send it back immediately or leave it waiting until you have completed other documents.

9.8 Updating the project data in Tracker

To update Tracker on the server or PC with data from the Pocket PC, you must synchronise your data. You can do this after each document is completed or you can wait and upload many items at once.

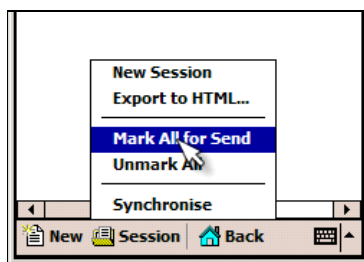
The 4-Stage Monitor continuously checks the queue for completed documents from surveyors/consultants. If any data arrives, it processes it, extracting signatures and pictures, putting them in the relevant folders, and making the certificates or documents available on the appropriate tab of the Projects screen.



Refer to Section 7.7.2, Synchronising your data, for information on performing the set-up procedure which tells the Pocket PC where the computer or server is that will receive the data, and for detailed information on methods of synchronisation.

To synchronise from the Pocket PC:

1. Ensure that the Pocket PC can reach the server's TCP/IP address over the Internet or an internal company network.
2. With the completed document item displayed, click on Session.
3. Select *Mark All for Send* from the menu.



4. Click on Session and select the *Synchronise* option from the menu.

A dialog box displays progress; as an item is uploaded it disappears from the list. Items only disappear from the list once the server has confirmed receipt, so there is no danger of losing items.

If any updates are available a message informs you. Always select **Yes** if you are offered newer versions or updated data.

When there are no items left on the list, the upload is complete and your data is synchronised.



You can upload an individual document quickly by highlighting it, pressing and holding on the item and selecting Send Now from the menu that is displayed.

On the 4-Stage Monitor screen on the server, the numbers are updated to reflect the documents requested and processed, as shown on the following screen.

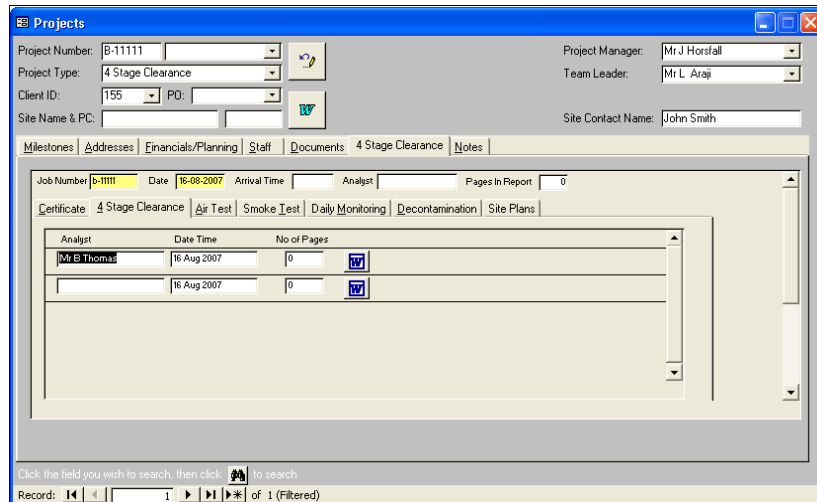
4 Stage Monitor	
Certificates/Document Requested	
4 Stage	1
Air Testing	2
Decontamination	0
Site Plans	0
Smoke Tests	0
Daily Monitoring	0
Certificates/Document Processed	
4 Stage	1
Air Testing	0
Decontamination	0
Site Plans	0
Smoke Tests	0
Daily Monitoring	0

9.9 Producing the certificates in Tracker

After synchronisation, the inspection data is available in Tracker for you to produce the required certificates.

To produce certificates:

1. Open the project record in Tracker.
2. Go to the appropriate project type tab – the 4 Stage Clearance tab – and select the tab for the type of document produced, such as Smoke Test, Air Test or 4-Stage Clearance.



Records are displayed to indicate the documents available. The record displayed at the top of the list is always the latest one.

3. Produce the document/certificate by clicking on the Word button to the right of record:



The finished document is displayed in Word.

Print the certificate as required from Word.

The certificate is automatically saved as soon as it is created and stored in the Project folder. Its name is in the format:

projecttype - dateofsurvey - analystname – project#.doc

As a project document, it is also added to the Documents tab where a link to it is displayed.

If you regenerate the certificate, the previous copy is renamed as a backup version and the new one is saved.