

Pocket ESA

Version 1

User's Guide

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Pocket ESA

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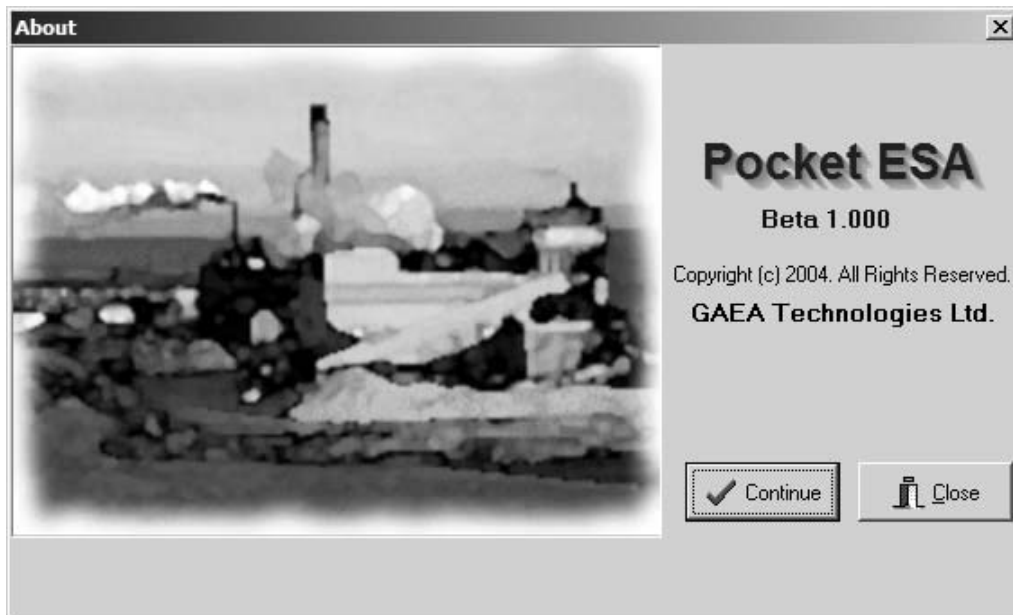
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1.

About Pocket ESA



1.0 About Pocket ESA

The Pocket ESA program is used to collect answers to pre-designed questions during the site reconnaissance. These answers are then merged with a report template on the desktop and a standard report is generated for the Phase I ESA. The merging process allows the user to insert different responses and paragraphs into the report depending upon how a question is answered.

1.1 Program Benefits and Uses

The purpose of a Phase I ESA is to identify actual and potential site contamination. This involves the evaluation and reporting of information collected through records review, site visits, and interviews. Phase I ESAs are conducted to identify environmental liabilities for property transactions; identify certain baseline environmental conditions; assist in meeting regulatory requirements; and as an initial step in site remediation.

There are four components to a Phase I ESA, these are:

1. Records Review
2. Site Visit
3. Interviews
4. Evaluation and Reporting

In North America there are two standards for conducting a Phase I ESA, these are CSA 764-94 Phase I Environmental Site Assessment and ASTM E1527 Standard Practice for Environmental Site Assessments: Phase I Environmental Site Assessment Process. The vast majority of firms in North America use a standardized report based upon one of these standards. To assist in generating this report, most firms have a standard Phase I ESA questionnaire that is used by the assessor to collect the appropriate data.

The site visit portion of the Phase I ESA usually takes one or more days and can represent the most time consuming portion of the Phase I ESA. During the site visit the assessor must visually and physically observe the actual and potential environmental liabilities on the property and buildings and on neighboring properties.

1.2 Methodology and Data Flow

The Pocket ESA program has been designed to minimize the amount of time required to generate a standard report and to maximize the flexibility of the final report. To accomplish this, the process has been divided into four steps. The first two steps only need to be performed once for each type of questionnaire and report. The last two steps are performed for each Phase I ESA. These steps are:

1.2.1 Create a Report Template

The first step is to create a report template using Microsoft Word. This template is later merged with the specific responses of a Phase I ESA to create a final report.

The template is a generic form of the final report and contains keywords where the specific answers to the questionnaire are to be merged into the report. These keywords are highlighted in the report template using a unique style created for the Pocket ESA program.

The answers to be merged into the report are not necessarily the direct answers to the questions, but are the text responses associated with the answer.

For example, if the answer to the question “Are there any ACMs suspected?” is “No” the text merged into the final report is not necessarily “No” but could be a paragraph of text that has been associated with this response; such as, “There are no asbestos containing materials suspected on the subject property.” These associations are defined as part of the questionnaire and are entered during the creation of the questionnaire.

1.2.2 Create a Questionnaire

The next step is to create a questionnaire that is used to collect the site reconnaissance data of a Phase I ESA. Typically, the questionnaire will adhere to a national standard such as the CSA or ASTM standards. However, abbreviated questionnaires may be created and used in some situations. After a questionnaire has been created it can be downloaded to the Pocket PC or used directly on the desktop.

Questionnaires are divided into sections and subsections which can contain any number of questions. For every question a question type is selected. The question type determines the format of the question and allowable answers that are used to collect the data. There are numerous question types that can be selected.

After the question type has been selected and the question entered, the text associated with each allowable response is entered. This is the text that will actually be merged into the final report.

Methodology and Data Flow

When the questionnaire is created it is associated with a report template that is used to create the merged report for a Phase I ESA. Each question is associated with a keyword from the report template. These keywords are used as placeholders in the final report for the text associated with the question response.

Depending upon the length of the report and number of questions, these first two steps can be very labor intensive. But after they have been completed, the resulting questionnaires can be used to collect thousands of Phase I ESAs and the report templates can be used to create thousands of final reports.

1.2.3 Enter Phase I ESA Survey Reconnaissance Data

After the questionnaire has been created, it can be used to collect the Phase I ESA reconnaissance data in the field. The Phase I ESA surveys collected are grouped into projects. Projects typically contain associated Phase I ESAs.

The data for a Phase I ESA is collected by answering each of the questions in the questionnaire. The form used and allowable answers for the question are specified when the questionnaire is created. All of the data is automatically saved as it is entered.

After the data has been collected it is merged with the report template to create a final report. Prior to merging the data with the report template, the answers can be modified and edited on the desktop.

1.2.4 Merge Survey Data with the Report Template

The final step is to create a final report by merging the data collected on the Pocket PC or desktop with the report template.

During the merging process the keywords in the report template are replaced by the text associated with each of the answers to the questions.

After the survey data has been merged a final report will be created in Microsoft Word format. This report can then be edited in Word to include the information regarding the records reviews and interview.

1.3 System Requirements

Pocket ESA has been designed to run on a variety of pocket computers or directly on the desktop. Below are the software and hardware requirements for the program.

1.3.1 Software Requirements

On the Pocket PC:

- Microsoft Windows CE 3.0 or higher (Windows Powered Pocket PC)

On the desktop:

- Microsoft Windows 98/2000/NT or XP
- Microsoft Word 97 or higher

1.3.2 Hardware Requirements

On the Pocket PC:

- minimum of 32 MB of memory

On the desktop

- minimum of 128 MB of memory
- CD-ROM drive.

1.4 Installation

To get Pocket ESA up and running, run the “setup.exe” and “pocket_setup.exe” programs on the CD-ROM. Before installing the program on your Pocket PC make sure it is connected to your desktop. For example, to install from drive D:

1. Start Windows
2. Insert the CD-ROM into drive D;
3. Choose Start and then Run and type “D:\PocketESA\setup.exe”, or double-click on “D:\PocketESA\setup.exe” in Windows Explorer, or double-click on the Add/Remove Programs icon in the Control;
4. Enter the requested information in the installation forms, discussed in the next section.
5. Repeat steps 3 and 4 for “pocket_setup.exe”.

On some computer systems, depending on how they are configured, inserting the CD-ROM into the drive will automatically start the GAEA menu program. In this case select Pocket ESA from the menu screen.

Registering and Unlocking Pocket ESA

All of the programs listed on the menu screen can be installed and will run in demo mode until an unlock code is provided.

1.5 Registering and Unlocking Pocket ESA

Before Pocket ESA can be used it must be registered on both the desktop and Pocket PC. Prior to the registration process the program will run in Demo mode. During the registration the program will be unlocked.

1.5.1 Registering on the Desktop

To register the program on the desktop and obtain an unlock code, run the Pocket ESA program and press the Register button. The Registration form shown below will be displayed. In the middle of this form a unique serial number will be displayed. This serial number is unique for each computer.

Registration

To register the software and obtain an unlock code, click the obtain unlock code button. A registration form on GAEA's internet site will be displayed. Fill in the information on the form and then submit the form.

Serial Number:

If you are unable to access the internet, please call us at (905) 666-7527 or fax us at (905) 666-3744.

After you have received an unlock code enter it below and click the button.

Unlock Code:

If your computer is connected to the Internet, you can obtain the unlock code by clicking on the Obtain Unlock Code button. After the button is pressed a registration form on GAEA's web site will be displayed on your internet browser. Fill out the form and then click on the submit button. After your registration information has been received an unlock code will be emailed to you.

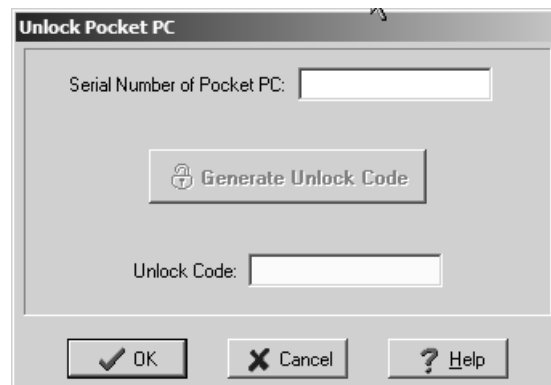
If your computer is not connected to the Internet, you can call or fax us the serial number.

After GAEA has received your unique serial number, an unlock code will be generated and emailed or faxed to you. When you receive the unlock code enter it in the space at the bottom of the Registration form and then press the Store Unlock Code button.

1.5.2 Registering on the Pocket PC

To unlock Pocket ESA on the Pocket PC, run the program and then select the Register menu item from the File menu on the Pocket PC. A unique serial number will be displayed.

On the desktop select the Unlock Pocket PC menu item from the Help menu. The Unlock Pocket PC form below will be displayed. Enter the serial number from the Pocket PC then press the Generate Unlock Code button. The unlock code will then be displayed on the form. Enter this code in the Register form on the Pocket PC.



The image shows a Windows-style dialog box titled "Unlock Pocket PC". It contains the following elements:

- A text input field labeled "Serial Number of Pocket PC:".
- A button labeled "Generate Unlock Code" with a key icon to its left.
- A text input field labeled "Unlock Code:".
- Three buttons at the bottom: "OK" (with a checkmark icon), "Cancel" (with an X icon), and "Help" (with a question mark icon).

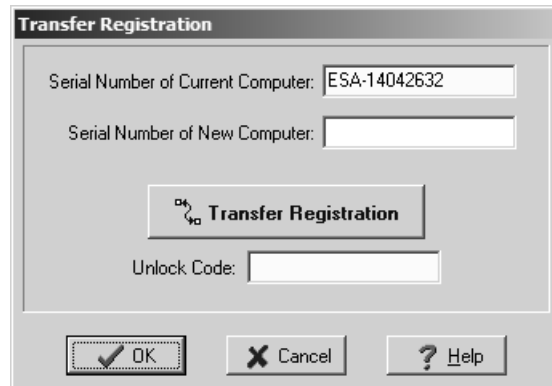
1.6 Transferring the Registration

After the Pocket ESA program has been registered, the unlocked program can be transferred to a different computer using the Transfer utility. This utility allows you to move the Pocket ESA program between computers without requiring assistance from GAEA. After the registration has been transferred the Pocket ESA program will only run on the new computer.

Step 1. The first step is to obtain the unique serial number of the new computer. Install and run Pocket ESA on the new computer. Initially the program will start in Demo mode and the Demo form will be displayed. Press the Register button and write down the unique serial number for the new computer.

Step 2. In the second step the Transfer utility is used to generate an unlock code for the new computer. Start Pocket ESA on the old PC and select the Transfer menu item from the Help menu. The Transfer Registration form on the next page will be displayed. Enter the serial number of the new computer and then press the Transfer Registration button. An unlock code for the new computer will be displayed. Enter this unlock code in the Registration form on the new computer, and then press the Store Unlock Code button.

Transferring the Registration



The image shows a 'Transfer Registration' dialog box. It has a title bar with the text 'Transfer Registration'. Inside the dialog, there are two text input fields. The first is labeled 'Serial Number of Current Computer:' and contains the text 'ESA-14042632'. The second is labeled 'Serial Number of New Computer:' and is empty. Below these fields is a button with a circular arrow icon and the text 'Transfer Registration'. Underneath the button is a text input field labeled 'Unlock Code:' which is also empty. At the bottom of the dialog, there are three buttons: 'OK' with a checkmark icon, 'Cancel' with an 'X' icon, and 'Help' with a question mark icon.

2.

Report Templates

2.0 Creating a Report Template

Prior to creating a questionnaire for a Phase I ESA, a report template using Microsoft Word should be created. This template is later merged with the specific responses of a Phase I ESA to create a final report for the survey. The template is a generic form of the final report and contains keywords where the specific answers to the questionnaire are to be merged into the report. These keywords are highlighted in the report template using a unique style created for the program.

The answers to be merged into the report are not necessarily the direct answers to the questions, but are the text responses associated with the answer.

For example, if the answer to the question “Are there any ACMs suspected?” is “No” the text merged into the final report is not necessarily “No” but could be a paragraph of text that has been associated with this response; such as, “There are no asbestos containing materials suspected on the subject property.” This response can be further edited on the desktop prior to being merged.

These associations are defined as part of the questionnaire and are entered during the creation of the questionnaire.

The easiest method to create a report template is to edit a copy of an existing Phase I ESA report in Word. A style for the Phase I ESA keywords can be added to the report and used to highlight the keywords. These keywords should replace the text in the report that will change for each Phase I ESA.

Proper placement of the keywords and the text to be substituted requires planning and some trial and error experience. Before creating a report template it is recommended that the example report template included with the program be reviewed.

2.1 Adding a Style to a Word Document

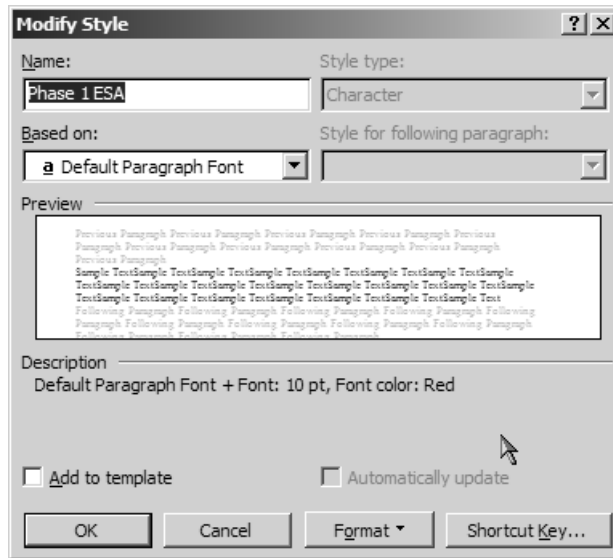
The name of the style used to highlight the keywords in the report template is typically “Phase I ESA”. However, the name of the style can be changed in the preferences of the Pocket ESA program. The name of the style specified in the Pocket ESA program must exactly match the name used in the report template.

To change the name of the style select the Preferences menu item from the File menu of the program. On the Preferences form enter the name of the style to be used.

Before entering the keywords in the report template the Phase I ESA style should be added to the Word Document. There are two types of styles in Word, paragraph and character. The Phase I ESA style must be a character style.

Using Styles in a Word Document

To add the Phase I ESA character style to the report template, open the report document in Word and then select the Style menu item from the Format menu. Click on the New button on the Style form to display the Modify Style form. Enter the name of the style as “Phase I ESA” or whatever name was specified in the Pocket ESA program preferences. In the Style type box select Character. Then change any other format options desired such as font style and color. To make it easier to recognize the keywords in the report template it is recommended that the style have a different color and font.

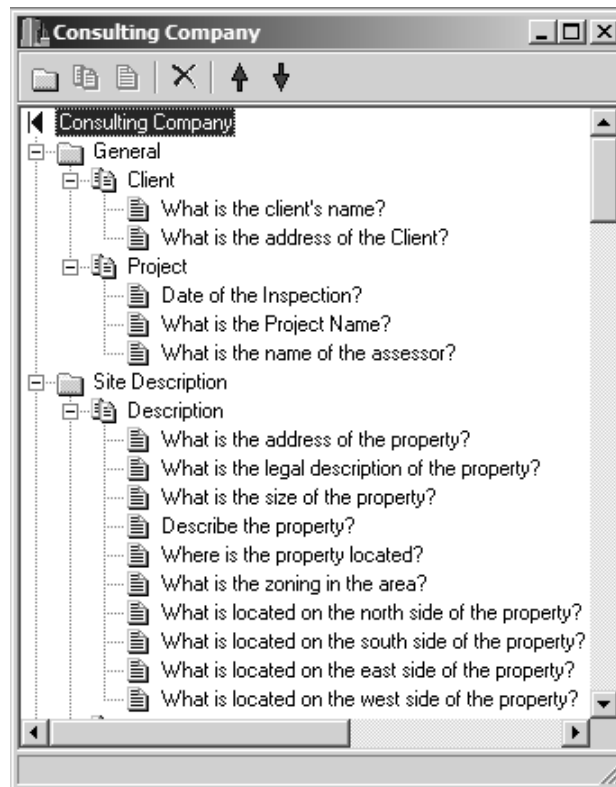


2.2 Using Styles in a Word Document

After the Phase I ESA style has been added to the report template, it can be used to highlight the keywords. To change the style of a keyword select the keyword and then either select the Phase I ESA style from the Style box on the Formatting toolbar or select the Style menu item from the Format menu.

3.

Editing Questionnaires



3.0 Creating and Editing a Questionnaire

After the report template has been created the next step is to create a questionnaire that is used to collect the site reconnaissance data of a Phase I ESA. This questionnaire will assign a keyword specified in the report template to each question. The text associated with the answer to that question will then replace the keyword when the actual Phase I ESA data is merged to create a final report.

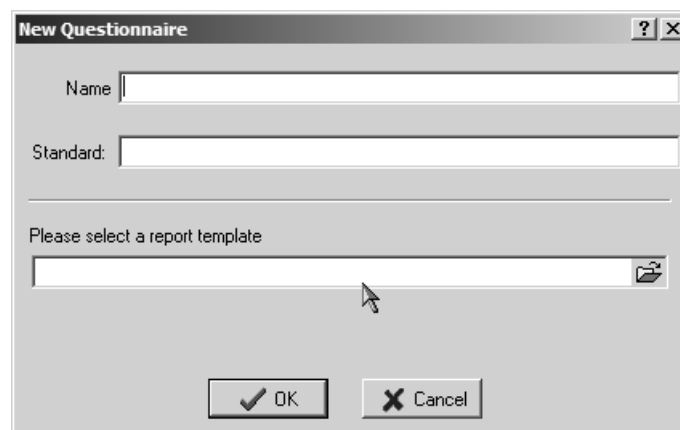
Typically, the questionnaire will adhere to a national standard such as the CSA or ASTM standards. However, abbreviated questionnaires may be created and used in some situations. After a questionnaire has been created it can be downloaded to the Pocket PC or used directly on the desktop. It can then be used for numerous Phase I ESAs.

Questionnaires are divided into sections and subsections which can contain any number of questions. For every question a question type is selected. The question type determines the format of the question and allowable answers that are used to collect the data. There are numerous question types that can be selected.

After the question type has been selected and the question entered, the text associated with each allowable response is entered. This is the text that will actually be merged into the final report.

3.1 Creating a New Questionnaire

To create a new questionnaire either click on the New button on the Questionnaire toolbar or select the New menu item from the Questionnaire submenu of the File menu. The Create New Questionnaire form will be displayed as shown below.



The image shows a dialog box titled "New Questionnaire". It has a title bar with a question mark and a close button. The dialog contains the following elements:

- A text input field labeled "Name".
- A text input field labeled "Standard".
- A horizontal separator line.
- A dropdown menu with the text "Please select a report template" and a small icon on the right.
- Two buttons at the bottom: "OK" with a checkmark icon and "Cancel" with an 'X' icon.

Creating a New Questionnaire

The following information should be entered on this form:

Name: This is the name of the questionnaire. It will be displayed when opening questionnaires and creating Phase I ESA surveys.

Standard: This is the standard used for the questionnaire. Typically, CSA or ASTM in North America.

Report Template: This is the file name for the report template previously created in Word. To select a file use the Open File button on the right.

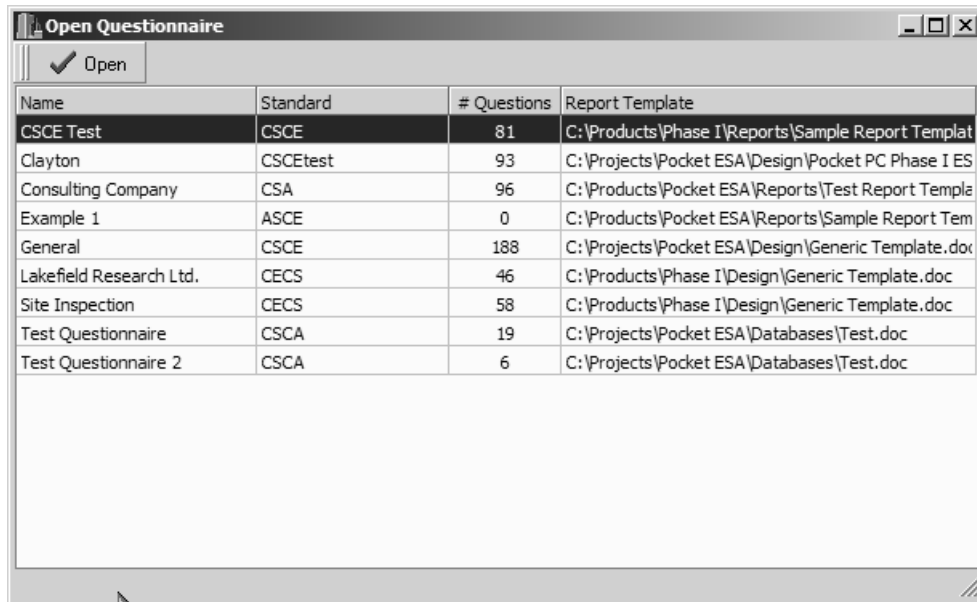
After the above information has been entered press the Ok button to create the questionnaire. A Questionnaire form will be displayed.

To make it easier to group and find questions each questionnaire is divided into sections and sub-sections. Typical sections might be “Site Description” and “Site Reconnaissance”. Within the “Site Reconnaissance” section typical sub-sections might be “Property Use”, “Hazardous Materials”, and “Storage Tanks”.

Once the questionnaire has been created the sections, sub-sections, and questions can be created and edited as described in the editing section below.

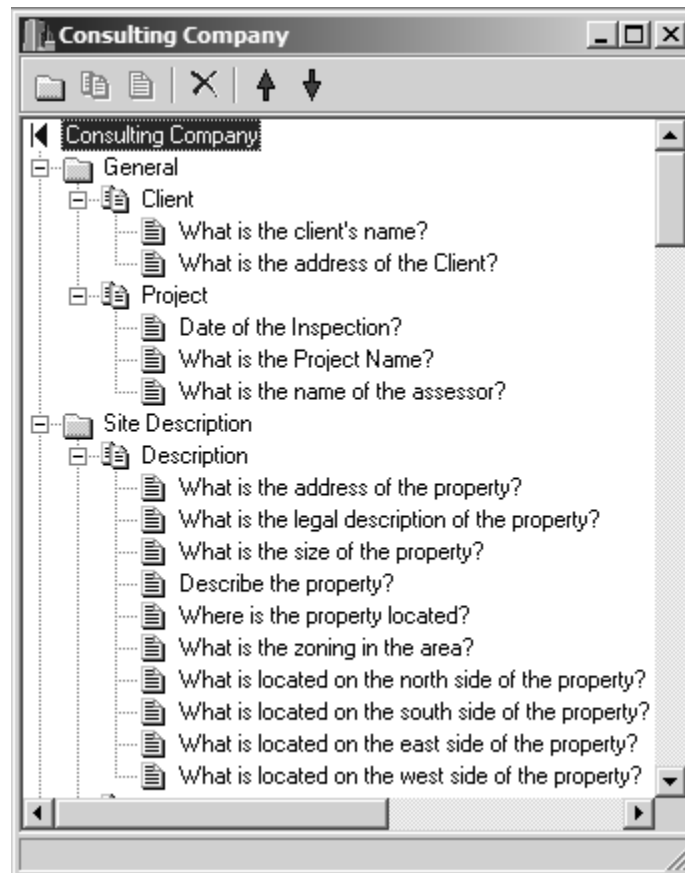
3.2 Opening a Questionnaire

To open a previously created questionnaire select the Open menu item from the Questionnaire sub-menu on the File menu or click the Open button on the Questionnaire toolbar. The Open Questionnaire form shown below will be displayed. Select the desired questionnaire and press the Ok button.



3.3 Editing a Questionnaire

After a questionnaire has been opened or created the Questionnaire form shown below will be displayed. At the top of the form the name of the questionnaire is displayed above the form's toolbar. The questionnaire is divided into sections and subsections, only subsections can contain questions. Sections and subsections can be expanded and collapsed using the plus and minus buttons to the left of the section or subsection name.




If it is a new questionnaire it will not have any sections or subsections yet, these can be added as described below.

3.3.1 Editing Sections

The sections of a questionnaire contain all of the subsections and are indented once from the left. A questionnaire can have any number of sections. The sections can be edited as described below.

3.3.1.0 Adding a Section


 To add a new section either click on the Add Section button on the toolbar at the top of the form or select the Add Section menu item from the Edit menu. The Edit menu is displayed at the top of the program or can be displayed by clicking the right mouse button.

A new section will be created at the bottom of the questionnaire with the name New Section. The name of the section can be changed by entering it in the input box. The maximum length of a section name is 255 characters.


3.3.1.1 Renaming a Section

The name of a section can be changed by clicking on the section and then selecting the Rename menu item from the Edit menu. The new name of the section can then be entered in the input box.

3.3.1.2 Moving a Section

 Sections can be moved up or down by selecting the section and then clicking on the up or down arrows on the toolbar.


3.3.1.3 Deleting a Section

 To delete a section, select the section and then click on the Delete button on the toolbar or select the Delete menu item from the Edit menu. When a section is deleted all of the subsections and questions within the section will also be deleted.

3.3.2 Editing Subsections



Subsections of a questionnaire contain all of the questions and are members of a section. A section can have any number of subsections. The subsections can be edited as described below.

3.3.2.0 Adding a Subsection


 To add a new subsection either click on the Add Subsection button on the toolbar at the top of the form or select the Add Subsection menu item from the Edit menu.

A new subsection will be created at the bottom of the current section with the name New Subsection. The name of the subsection can be changed by entering it in the input box. The maximum length of a subsection name is 255 characters.


3.3.2.1 Renaming a Subsection

  The name of a subsection can be changed by clicking on the subsection and then selecting the Rename menu item from the Edit menu. The new name of the subsection can then be entered in the input box.

3.3.2.2 Moving a Subsection

 Subsections can be moved up or down by selecting the subsection and then clicking on the up or down arrows on the toolbar.


3.3.2.3 Deleting a Subsection

 To delete a subsection, select the subsection and then click on the Delete button on the toolbar or select the Delete menu item from the Edit menu. When a subsection is deleted all of the questions within the subsection will also be deleted.

3.3.3 Editing Questions

The questions of a questionnaire are grouped into subsections. A subsection can have any number of questions. The questions can be edited as described below.

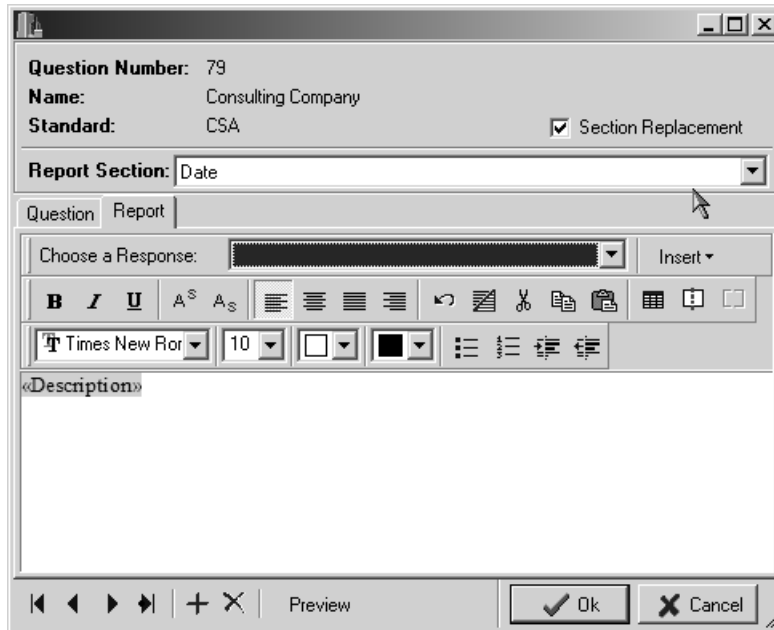
3.3.3.0 Adding a Question

 To add a new question either click on the Add Question button on the toolbar at the top of the form or select the Add Question menu item from the Edit menu.

A new question will be created at the bottom of the subsection with the name New Question. The name of the question is the text from the question itself and can be changed by editing the question. The maximum length of a question is 160 characters.

3.3.3.1 Editing a Question

To edit a question double click on the question on the Questionnaire form. The question can then be edited in the Question form shown below. This form has two tabs, one for the question and one for the report.



Editing Questions

The question tab is used to specify the question and question type and the report tab is used to specify the text that will be inserted into the report during the merging of the Phase I ESA results.

Report Section

At the top of the form, shown on the previous page, there is a combo box where you can select the keyword in the Report Section. When the arrow on the right is selected a list of keywords that have been entered in the report template will be displayed.

A keyword from the list must be selected for the question. This keyword will determine where the text results of the question will be placed in the report when it is merged. If no keyword is selected the results of the question will not appear in the report.

Section Replacement

Also at the top of the form is a checkbox for Section Replacement. If the box is checked, during the merging of the report any instance of the section heading (keyword) will be replaced with the answer text. If the box is not checked, during the merging of the report the answer text will only be inserted below the first instance of the keyword and the section heading (keyword) will be left in place.

The screenshot displays a software window titled "Editing Questions". At the top, it shows the following fields: "Question Number: 79", "Name: Consulting Company", and "Standard: CSA". To the right of the "Standard" field is a checked checkbox labeled "Section Replacement". Below these fields is a "Report Section:" dropdown menu currently showing "Date". The main area of the window is divided into two tabs: "Question" (which is selected) and "Report". Under the "Question" tab, the text "Date of the Inspection?" is entered in a text box. Below this text box is a list of four response options, numbered 1 through 4. At the bottom of the window, there is a "Question Type:" dropdown menu set to "Multiple Choice (4 Responses)". The bottom-most bar contains navigation arrows (back, forward, home, end), a "Preview" button, and "Ok" and "Cancel" buttons.

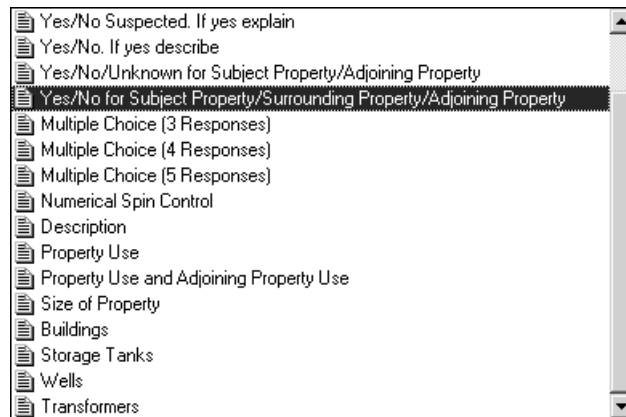
Editing Questions

Question Tab

The question tab, shown on the previous page, is used to specify the text of the question and the type of question.

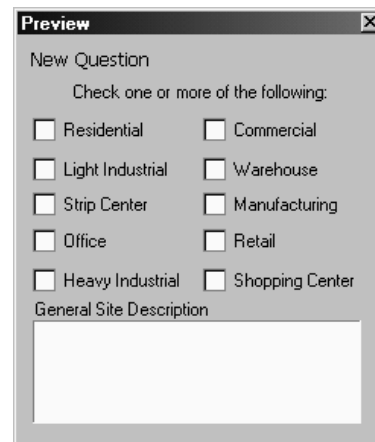
Question text is entered in the input box and can be a maximum of 160 characters. This is the text that is displayed on the Questionnaire form and on the Question form on the Pocket PC.

The **question type** determines the format of the question and the types of answers that are allowed. To select the question type click on the arrow to the right of the input box. The question type can then be selected from the list of question types, as shown below. Currently there are 19 types of questions.



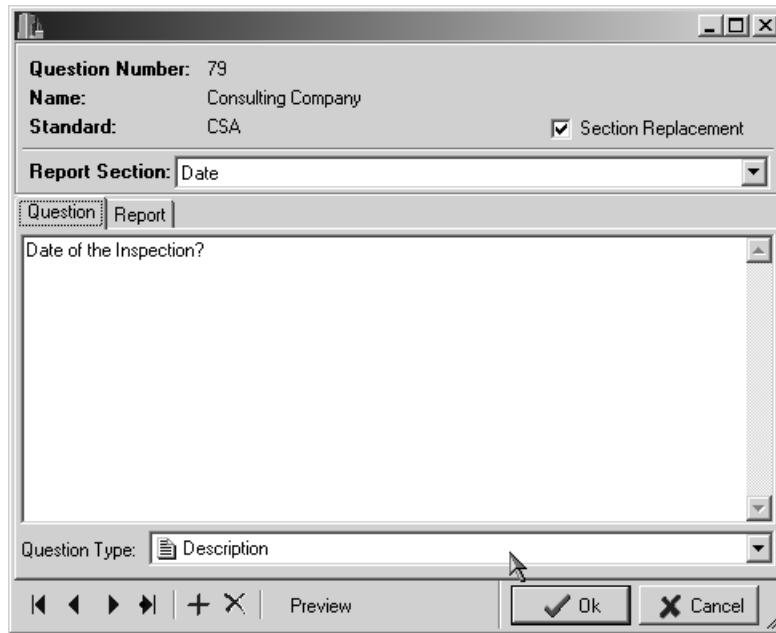
As the selection in the list is moved the question type will be previewed on a form beside the Question form.

If the question type is multiple choice, input boxes will be added to the bottom of the tab for the possible choices. Enter the text for each of the choices in these input boxes.

A screenshot of a 'Preview' window titled 'New Question'. It contains a section 'Check one or more of the following:' with eight checkboxes: Residential, Commercial, Light Industrial, Warehouse, Strip Center, Manufacturing, Office, Retail, Heavy Industrial, and Shopping Center. Below this is a section 'General Site Description' with a large empty text input box.

Report Tab

The report tab contains an input box where you select a response for the question, a rich edit text field where you enter the text associated with the response, and an Insert button for inserting question text into the associated text.



To select a **response** click on the arrow to the right of the input box, a list of available responses will be displayed. The available responses will depend on the type of question. For example, for a Yes/No question there would be two available responses or for a Multiple Choice 3 Response question type there would be 3 responses.

The **Insert** button allows for the insertion of text that was entered when the question was answered on the Pocket PC. For example, this text could be entered as the “Description” or as “Additional Information” for the question. The text entered on the Pocket PC can be used for the associated text of the response or could be inserted into other text entered in the input box for the associated text.

When the Insert button is pressed a list will be displayed showing the types of text that could be entered with the question on the Pocket PC. To include the text that entered on the Pocket PC in the associated text of the question, position the cursor in the text input box where you want the inserted text to appear and then click on the Insert button and select it from the list.



Editing Questions

Below the response selection is a **Rich Text toolbar** and input box, these are used to enter the text associated with the selected response. The text associated with the response can be as simple or as complicated as desired. There is no practical limit to the length of the text.



3.3.3.2 Copying a Question

To copy a question to the clipboard, select the question then click the right mouse button and select Copy from the popup menu.

3.3.3.3 Pasting a Question

To paste a question from the clipboard, select the question below which the new question will be pasted and then select Paste from the popup menu.

3.3.3.4 Renaming a Question

The name of the question is the text from the question itself and can be changed by editing the question as discussed above. The maximum length of a question is 160 characters.

3.3.3.5 Moving a Question



Questions can be moved up or down by selecting the question and then clicking on the up or down arrows on the toolbar or by selecting the question and dragging it to the new location on the questionnaire form.

3.3.3.6 Deleting a Question



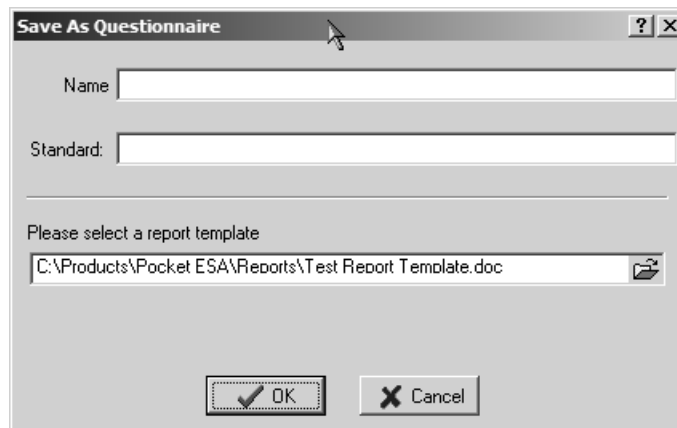
To delete a question, select the question and then click on the Delete button on the toolbar or select the Delete menu item from the Edit menu.

3.4 Saving a Questionnaire

After the editing of the questionnaire is completed it can be saved by clicking on the Save button on the Questionnaire toolbar or by selecting the Save menu item from the Questionnaire submenu on the File menu.

3.5 Copying a Questionnaire

To copy the questionnaire save it as a new questionnaire with a different name. Either click on the SaveAs button on the Questionnaire toolbar or select the SaveAs menu item from the Questionnaire submenu of the File menu. The Save As Questionnaire form below will be displayed, where you can enter the name of the new questionnaire to use for the copy.



The screenshot shows a dialog box titled "Save As Questionnaire". It features a title bar with a question mark and a close button. The main area contains two text input fields: "Name" and "Standard:". Below these is a section titled "Please select a report template" with a text box containing the path "C:\Products\Pocket ESA\Reports\Test Report Template.doc" and a folder selection icon. At the bottom are "OK" and "Cancel" buttons.

3.7 Refreshing the List of Keywords

When changes are made to the keywords in the Word report template, these changes can be updated for the questionnaire using the Refresh button at the top of the form. The changes in the Word report template need to be saved in Word before pressing the Refresh button.

3.8 Checking Unused Keywords

When designing a questionnaire it can be helpful to know what keywords in the report template have not been used. To display a list of unused keywords click on the Check Keywords button at the top of the form.

3.9 Opening the Report Template

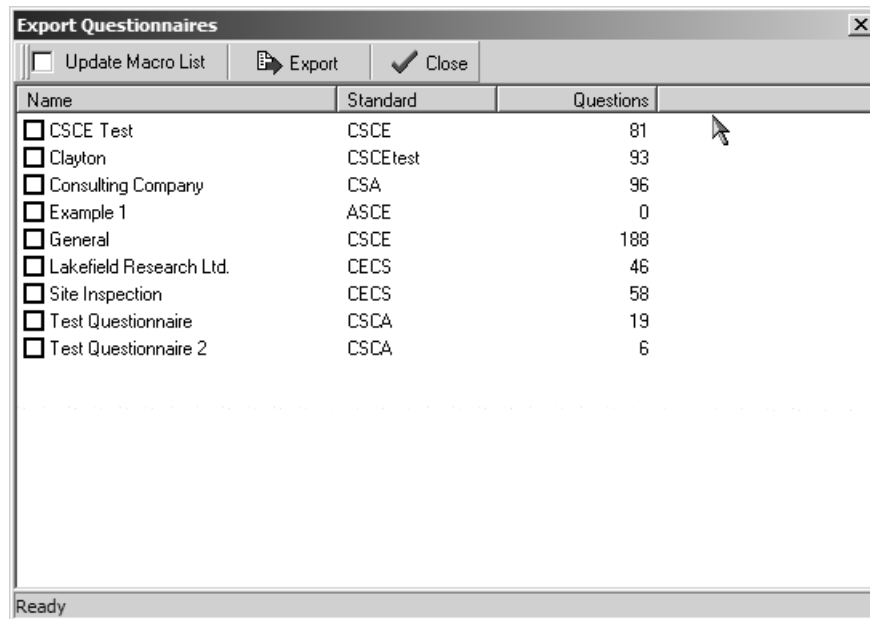
The report template associated with the questionnaire can be opened in Word by pressing the Open Report Template button at the top of the form.

3.10 Creating a Blank Questionnaire Form

The questionnaire can be used to create a blank form that can be used to collect the data in the field by clicking the Create Blank Questionnaire Form button at the top of the form.

3.11 Exporting Questionnaires to the Pocket PC

To export questionnaires to your Pocket PC click on the Export button on the Questionnaire toolbar or select the Export to Pocket menu item from the Questionnaire submenu of the File menu. The Export Questionnaires form below will then be displayed. This form can be used to export both questionnaires and text macros.



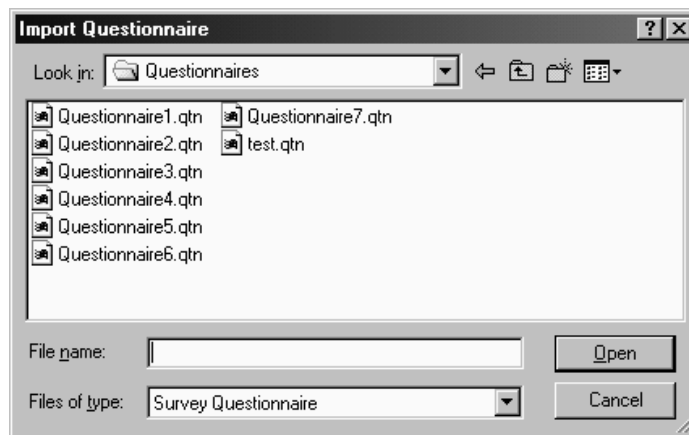
Importing a Questionnaire

Select the questionnaires to be exported by checking the boxes next to the questionnaire name. To export the text macros to the Pocket PC check the Update Macro List.

Before clicking on the Export to Pocket button on the form make sure that your Pocket PC is connected to the computer.

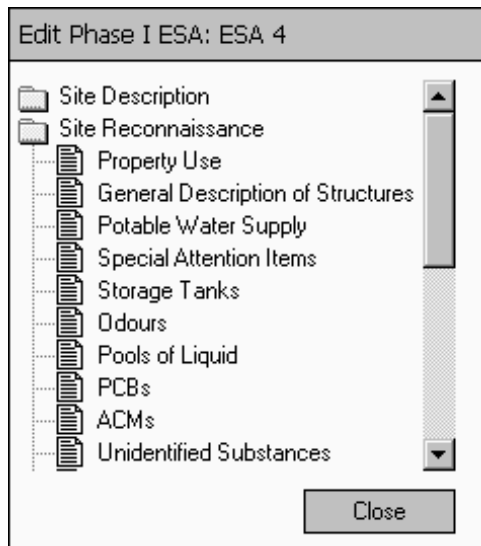
3.12 Importing a Questionnaire

Questionnaires from other computers or that you receive from email can be imported into the program by selecting the Import menu item on the Questionnaire submenu of the File menu. The Import Questionnaire form below will be displayed. Select the name of the file containing the questionnaire and then press the Import button.



4.

Survey Data



4.0 Entering Survey Data

After a questionnaire has been created and exported to the Pocket PC you are ready to start collecting Phase I ESA data. Alternatively, the Phase I ESA can be collected directly on the desktop. All Phase I ESA data is organized into Projects. You can have an unlimited number of projects and each project can contain an unlimited number of Phase I ESAs.

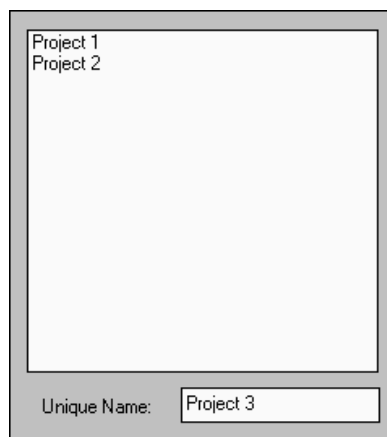
Before the data for a Phase I ESA can be entered, either a new project must be created or an existing project opened. The created or opened project is then referred to as the current project.

After the project has been opened, the new Phase I ESA can be created. Existing Phase I ESAs can be edited by first opening the project and then the Phase I ESA.

When the program is first started a list of available projects on the Pocket PC will be displayed.

4.1 Creating a New Project

To create a project select the New Project menu item from the File menu. A New Project form will be displayed where you can enter the name of the project (up to 100 characters). The project name must be unique. To assist the entry of a unique name a list of all of the existing projects is displayed.



The image shows a screenshot of a software interface for creating a new project. It features a rectangular window with a light gray background. In the top-left corner, there is a list of existing projects: "Project 1" and "Project 2". At the bottom of the window, there is a label "Unique Name:" followed by a text input field containing the text "Project 3".

After the name has been specified click on the Ok button to create the project.

4.2 Opening a Project

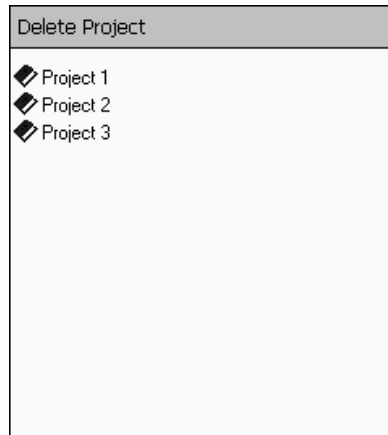
To open an existing project select the project on the Open Project form displayed when the program is started or when the current project is closed. The project can be selected by touching it with the stylus.



When the project is opened a list of existing Phase I ESAs in the project will be displayed. After a project has been opened it can be closed by selecting the Close Project menu item from the File menu.

4.3 Deleting a Project

To delete a project, first make sure that there is no project currently opened and then select the Delete Project menu item from the File menu. The Delete Project form will be displayed showing a list of existing projects. Select the project to be deleted from the list. If the Delete Project menu item is not available make sure that there is no project currently open.



4.4 Creating a New Phase I ESA

To create a new Phase I ESA make sure that a project has been opened and then select the New Phase I menu item from the File menu. A New Phase I ESA form below will be displayed where you can enter a unique name for the Phase I ESA (up to 100 characters). A list of existing Phase I ESAs in the project is also displayed.

ESA 1
ESA 2
ESA 3

Unique Name:

After the unique name has been specified click the Ok button and the Select Questionnaire form below will be displayed. Select the questionnaire to use for the Phase I ESA by clicking on it with the stylus and then pressing the Ok button.

Name	Standard
AGRA II	CSCE
Consulting Company	CSA
General	CSCE
Clayton	CSCEtest
Lakefield Research Ltd.	CECS
Site Inspection	CECS
Consulting Company	CSCE

Opening a Phase I ESA

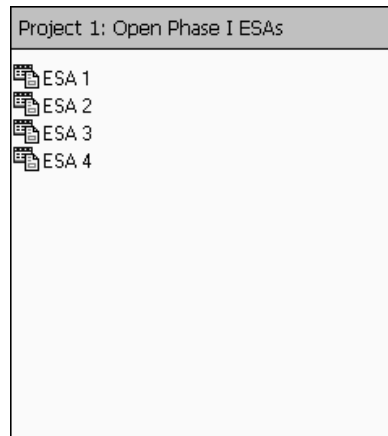
The questionnaire will determine the questions that can be answered for the Phase I ESA. The questionnaires are created on the desktop version of the program and exported to the Pocket PC. For more information on the creation and exporting of questionnaires see Chapter 3.

After the Phase I ESA has been created a menu tree will be displayed showing the sections, subsections, and questions of the questionnaire. The Phase I ESA data can then be entered by selecting a question from the menu tree.

If the New Phase I menu item is not available make sure that a project is currently opened and that no Phase I ESA is opened.

4.5 Opening a Phase I ESA

To open an existing Phase I ESA, first open the project containing the Phase I ESA and then select it from the Open Phase I ESA form as shown below.

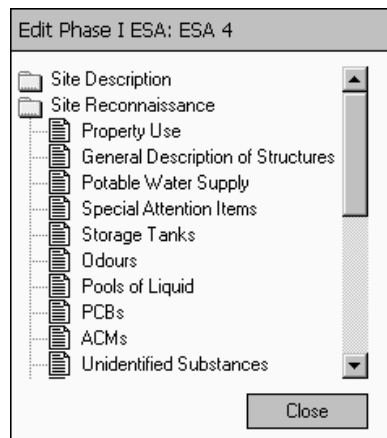


When the Phase I ESA is opened a menu tree will be displayed showing the sections, subsections, and questions specified in the questionnaire used for the Phase I ESA. The Phase I ESA data can be entered by selecting a question from the menu tree.

After a Phase I ESA has been opened it can be closed by clicking on the Close button.

4.6 Entering Phase I ESA Data

After a Phase I ESA has been created or opened, a menu tree will be displayed showing the sections, subsections, and questions specified in the questionnaire used for the Phase I ESA. The Phase I ESA data can be entered by selecting a question from the menu tree.



Sections in the menu tree can be expanded and collapsed by double clicking on the section name. When the section is collapsed only the section is displayed and the subsections are hidden. When the section is expanded all of the subsections are displayed below the section.

Subsections can contain one or more questions and can be expanded or collapsed by double clicking on the subsection name. When the subsection is collapsed only the subsection is displayed and the questions are hidden. When the subsection is expanded all of the questions are displayed below the subsection.

The data for a question can be entered by clicking on the question on the menu tree. A form will be displayed, similar to the one on the next page, showing the question and providing input areas for the answers to the question. The format of the form and allowable answers will depend on the question type that was specified when the questionnaire was created. Currently there are 19 types of questions.

Saving Phase I ESA Data

Buildings

Building 0

Age 0 years old

No. of Stories 0

Building Usage

General Building Construction

At the bottom of the question form there is a toolbar with the following buttons:

Macro The **Macro** button is used to insert previously created text macros into the answer. A form will then be displayed showing all of the available text macros. Select a macro from the form by clicking on it. These text macros are created on the desktop version of the program and then exported to the Pocket PC. By using previously created text macros you can significantly reduce the amount of text entry required.

- Click on the **Ok** button to save the question and go back to the menu tree.
- To not save the answer to the question click on the **Cancel** button.
- The **Previous** question in the subsection can be displayed by clicking on the Previous button.
- The Next button will display the **next** question in the subsection.
- After a question has been answered its icon on the question menu will have a checkmark in it.

4.7 Saving Phase I ESA Data

All Phase I ESA data is saved as it is entered, so there is no need to explicitly save the data. When entering the answers on the question forms they are saved whenever the Ok button is pressed.

Picture **4.8 Inserting Pictures**

Pictures or photographs can be inserted in the response for a question by clicking on the Insert Picture button at the top of the form. After the button is pressed a File Dialog box will be displayed where you can specify the file name for the picture

File **4.9 Inserting Files**

Other text files (Word, ASCII, HTML) can be inserted in the response for a question by clicking on the Insert File button at the top of the form. After the button is pressed a File Dialog box will be displayed where you can specify the file name for the file. These files can be used to insert database search results, historical information, etc.

Check **4.10 Checking Un-answered Questions**

The questions that have been answered are tracked and a list of un-answered questions can be displayed at any time by clicking on the Check Unanswered Questions button at the top of the form. A list of the questions that have not been answered will be displayed.

4.7 Saving Phase I ESA Data

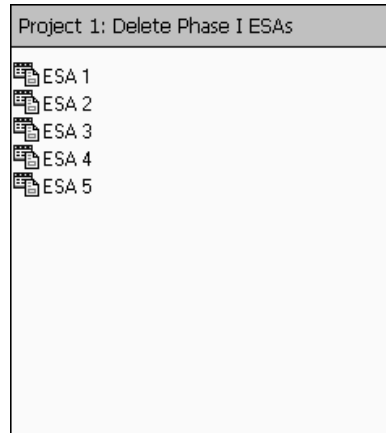
All Phase I ESA data is saved as it is entered, so there is no need to explicitly save the data. When entering the answers on the question forms they are saved whenever the Ok button is pressed.

4.8 Deleting a Phase I ESA

To delete a Phase I ESA select the Delete Phase I menu item from the File menu. The Delete Phase I ESA form on the next page will be displayed showing a list of existing Phase I ESAs in the project. Select the Phase I ESA to be deleted by clicking on it in the list.

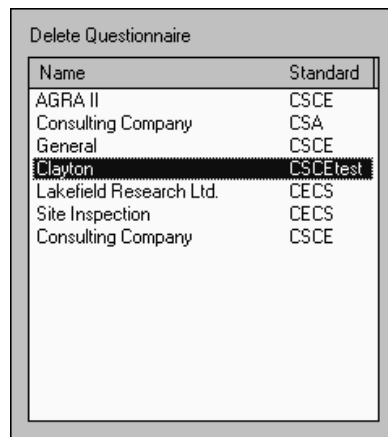
If the Delete Phase I menu item is not available make sure that there is a project open and no Phase I ESA is currently open.

Deleting a Questionnaire



4.9 Deleting a Questionnaire

To delete a questionnaire on the Pocket PC select the Delete Questionnaire menu item from the File menu. The Delete Questionnaire form will be displayed showing a list of questionnaires on the Pocket PC. Select the questionnaire to be deleted from the list and then press the Ok button.



If the Delete Questionnaire menu item is not available make sure that there is no project currently open.

5.

Merging Survey Data

The screenshot shows a dialog box titled "Merge Document". It contains the following elements:

- Status:** A section header.
- Response:** A dropdown menu with "ESA 3.esa" selected.
- Output Questionnaire and Answers Only**
- Save Merged Document As:** A section header.
- ESA 3.doc**: A text field with a document icon on the left and a save icon on the right.
- Questionnaire:** Consulting Company
- Input Document:** C:\Products\Phase I\Design\Generic Template.doc
- Buttons:** Merge, Merge All, and Cancel.

5.0 Merging Survey Data

After the Phase I ESA data has been collected on the Pocket PC, it can be uploaded to the desktop and merged with the report template to create the final report. During the merging process the keywords in the report template are replaced by the text associated with each of the answers to the Phase I ESA questions.

This last step in the process is performed on the desktop version of the program. All Phase I ESA data on the Pocket PC and desktop version of the program is organized into Projects. You can have an unlimited number of projects and each project can contain an unlimited number of Phase I ESAs.


Before the Phase I ESA data from the Pocket PC can be uploaded and merged, either a new project must be created or an existing project opened on the desktop version of the program. This created or opened project is then referred to as the current project.

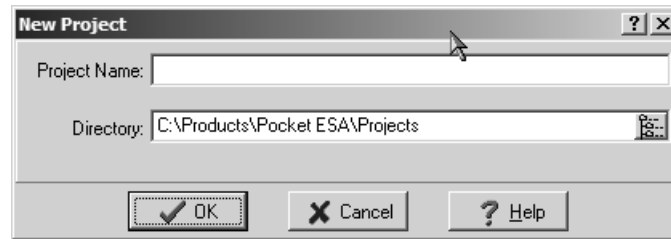
After the project has been created or opened, the Phase I ESA data can be uploaded from the Pocket PC. Once the data has been uploaded into a project it can be further edited if desired, prior to merging it with the report template.

In addition, new Phase I ESA surveys can be created and entered directly on the desktop. This feature could be used to collect the information with a laptop if a Pocket PC is not available.

When the merging is complete a final report will be created in Microsoft Word format. This report can then be edited in Word to include the information regarding the records reviews and interviews.

5.1 Creating a New Project

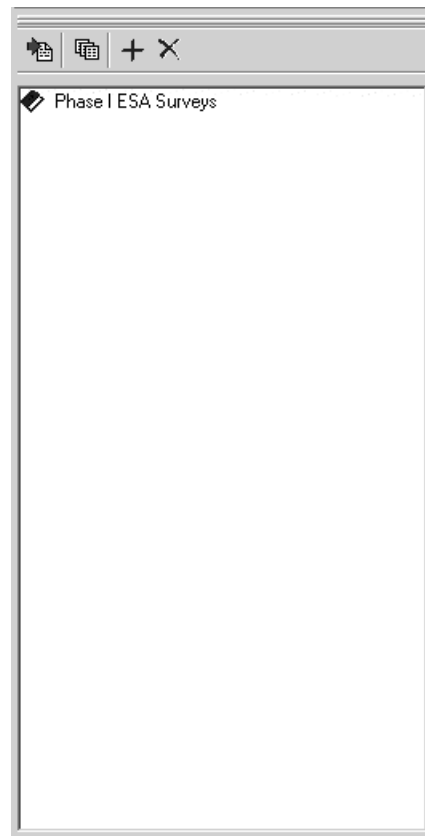
 To create a new project either click on the New Project button on the Project toolbar or select the New Project menu item from the Projects submenu of the File menu. A New Project form will be displayed as shown below, where you can enter the name of the project (up to 100 characters) and the directory to store the project.



The image shows a 'New Project' dialog box with a title bar containing a question mark and a close button. It features two input fields: 'Project Name:' and 'Directory:'. The 'Directory:' field contains the text 'C:\Products\Pocket ESA\Projects' and has a small folder icon button on its right side. At the bottom of the dialog are three buttons: 'OK' (with a checkmark), 'Cancel' (with an X), and 'Help' (with a question mark).


To change the directory where the project is located, click on the directory button on the right of the input field. This directory is used to store the project file and all uploaded Phase I ESA surveys for the project.

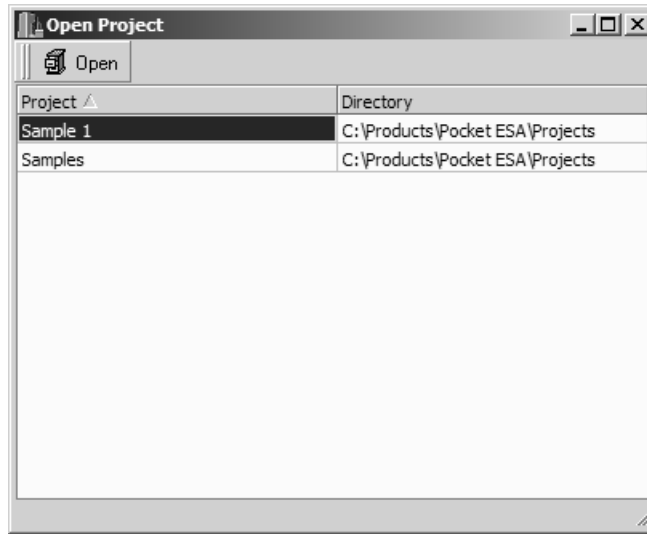
After the project information has been entered click the Ok button to create the project. A Project form, shown on the right, will be displayed showing all of the Phase I ESA surveys in the project. Initially, this form will be empty until Phase I ESA surveys have been uploaded or added to the project.



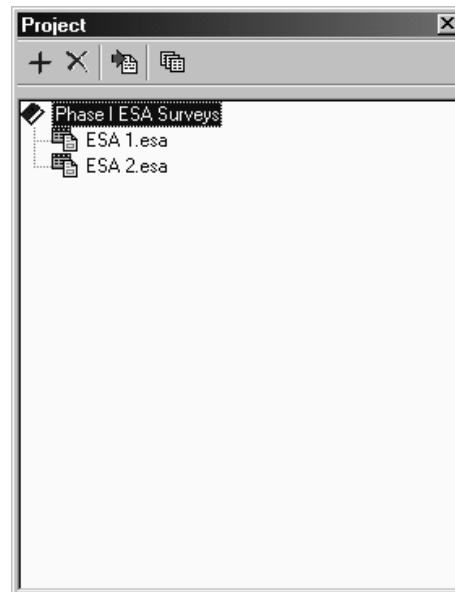
The image shows a project form window with a title bar containing a folder icon, a document icon, a plus sign, and a close button. The main area of the form is titled 'Phase I ESA Surveys' and is currently empty.

5.2 Opening a Project

 To open an existing project either click on the Open Project button on the Project toolbar or select the Open Project menu item from the Projects submenu of the File menu. The project's file name can then be selected using the Open form shown below.







After the project has been selected a Project form, shown on the right, will be displayed showing all of the Phase I ESA surveys in the project. The list of surveys can be expanded and collapsed by clicking on the top line in the list.




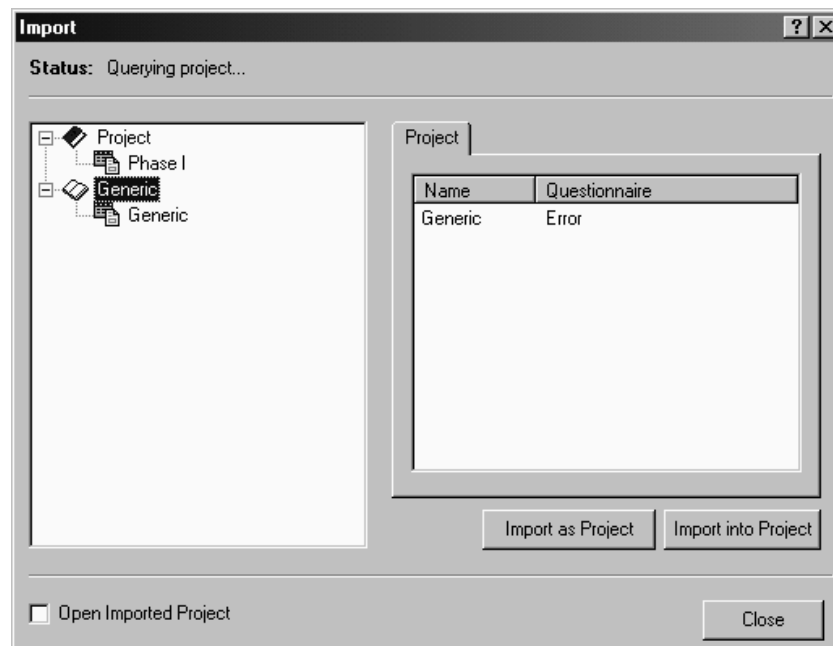
Uploading Survey Data

At the top of the Project form there is a toolbar that can be used for the following:

-  Uploading Phase I ESA surveys from the Pocket PC
-  Merging the survey data with the report template
-  Creating new Phase I ESA survey
-  Deleting a Phase I ESA survey

5.3 Uploading Survey Data

 To upload the survey data from the Pocket PC into a project click on the Upload button on the Project toolbar. The Import Pocket PC data form below will be displayed. Before clicking on the Upload button make sure that the Pocket PC is connected to the desktop. If there is no Pocket PC connected, the program will display a time-out message after a minute.




Adding a New Phase I ESA Survey

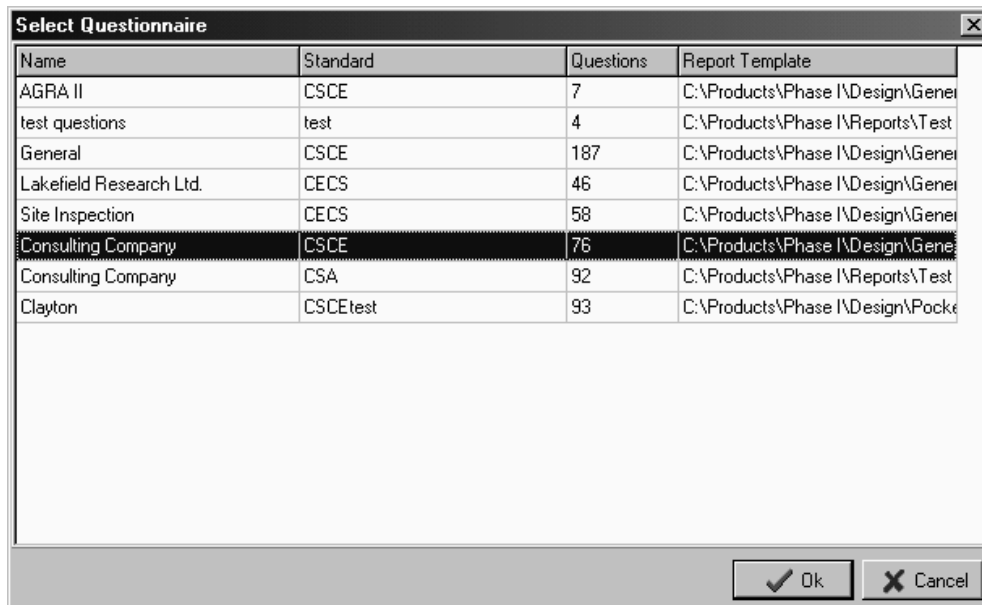
When this form is displayed the program will automatically connect to the Pocket PC and search for Phase I ESA projects and surveys. The projects and surveys will be listed on the form as shown below. The surveys for a project can be displayed and hidden by clicking on the project name in the list.

Either an entire project or an individual survey can be uploaded to the desktop. The selected project or survey can be imported into the current project or into a new project by clicking on the Import as Project or Import into Project buttons. If the data is imported as a new project you can open the project after the uploading is finished by checking the Open Imported Project box.

5.4 Adding a New Phase I ESA Survey

In addition to uploading the Phase I ESA survey data from the Pocket PC, a new Phase I ESA survey can be entered directly into the desktop version of the software. This feature is useful for collecting the data on a laptop if no Pocket PC is available.

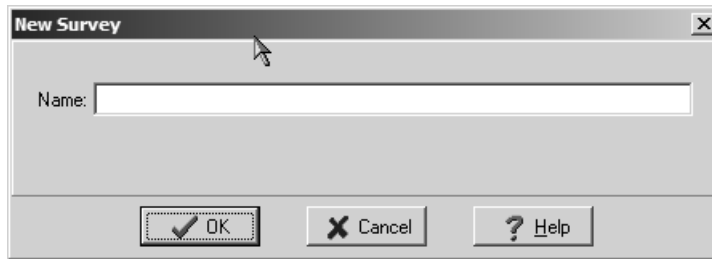
 To add a new Phase I ESA survey to a project click on the Add button on the Project toolbar. The Select Questionnaire form will be displayed as shown below. Select the desired questionnaire and then click on the Ok button



Name	Standard	Questions	Report Template
AGRA II	CSCE	7	C:\Products\Phase I\Design\Gener
test questions	test	4	C:\Products\Phase I\Reports\Test
General	CSCE	187	C:\Products\Phase I\Design\Gener
Lakefield Research Ltd.	CECS	46	C:\Products\Phase I\Design\Gener
Site Inspection	CECS	58	C:\Products\Phase I\Design\Gener
Consulting Company	CSCE	76	C:\Products\Phase I\Design\Gener
Consulting Company	CSA	92	C:\Products\Phase I\Reports\Test
Clayton	CSCEtest	93	C:\Products\Phase I\Design\Pocke

Editing Survey Data

After the questionnaire has been selected the New Survey form will then be displayed. Specify the name of the new Phase I ESA survey and then press the Ok button. The new Phase I ESA will then be displayed and can be edited as described in the next section.



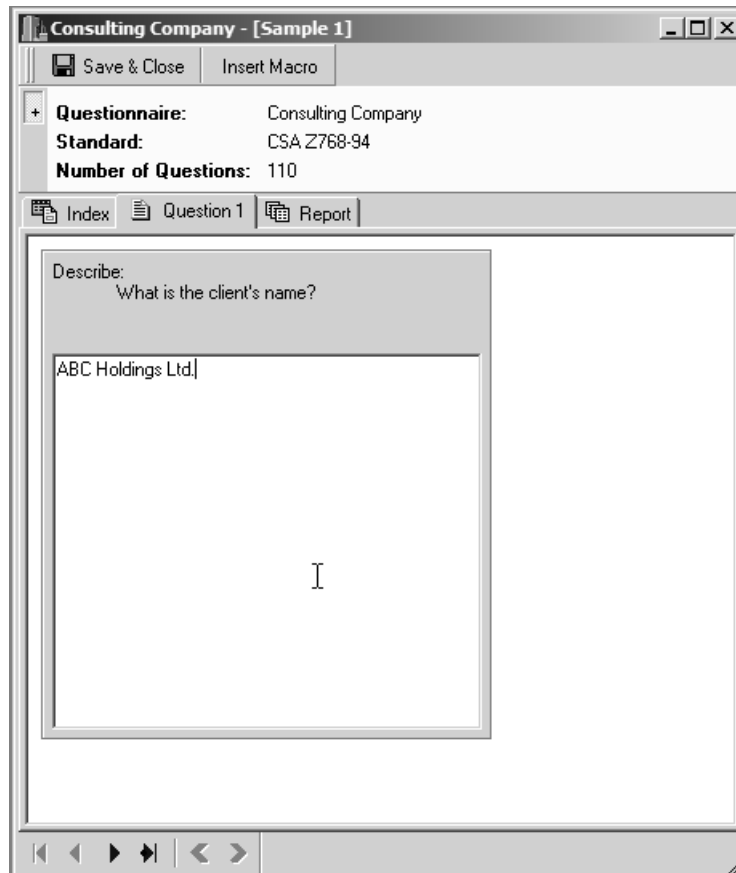
The image shows a standard Windows-style dialog box titled "New Survey". It features a close button (X) in the top right corner. The main area contains a text input field with the label "Name:". At the bottom, there are three buttons: "OK" (with a checkmark icon), "Cancel" (with an X icon), and "Help" (with a question mark icon).

5.5 Editing Survey Data

After the Phase I ESA survey data has been uploaded or a new survey created, it can be edited by double clicking on it in the Project list. The survey data will then be displayed on the Phase I ESA form shown on the next page. The Phase I ESA data form has three tabs; one for the Question, one for the Report, and one for the Index.

It may not always be necessary to edit the Phase I ESA data after it has been uploaded from the Pocket PC, in which case this step can be skipped.

Editing Survey Data

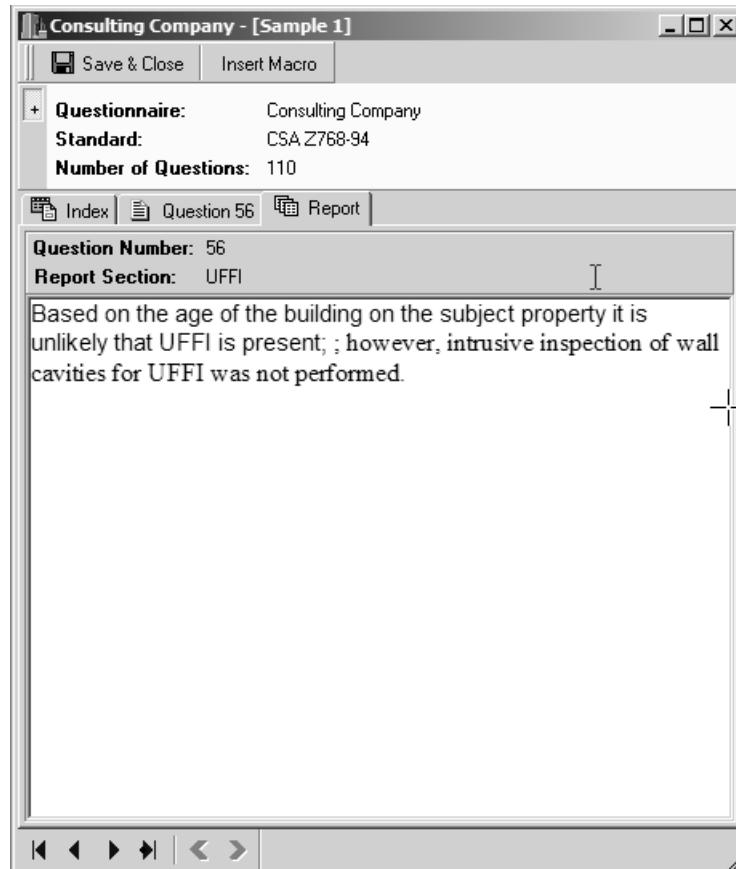


Question Tab

The Question tab displays the question and answers to the question. If the data was uploaded from the Pocket PC the answers are those that were entered on the Pocket PC, and if it is a new Phase I ESA being entered the answers are the default answers for the question.


This tab can be used to modify the answers to any of the questions of the Phase I ESA. Caution should be exercised when modifying the answers that are uploaded from the Pocket PC, since they represent the data that was collected in the field.

Editing Survey Data

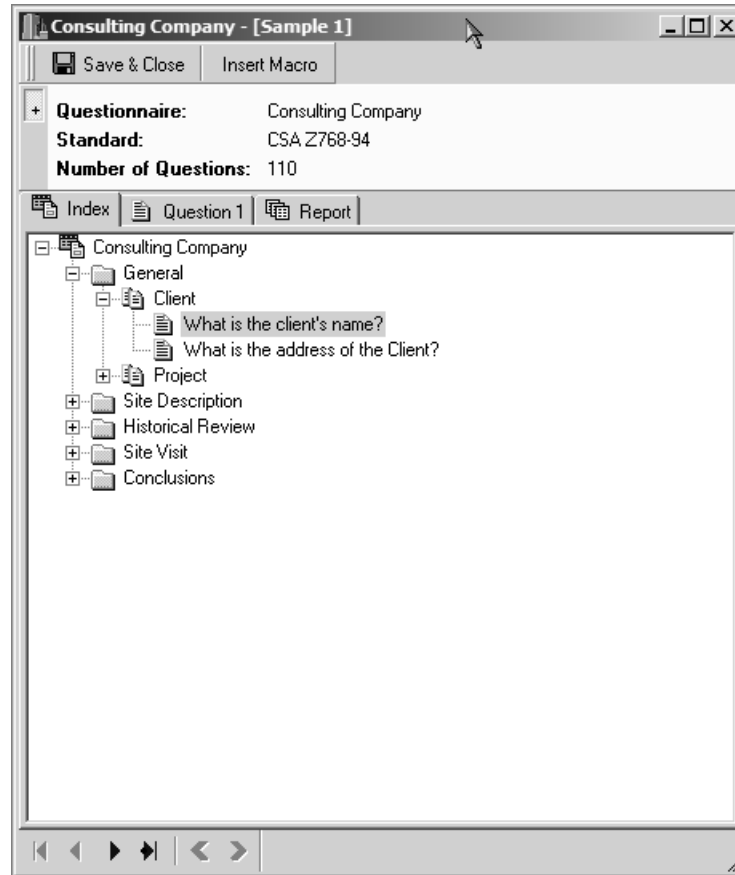


Report Tab

The Report tab displays the text that has been associated with the answers to the question. This is the text that will be merged into the final report.

 At the bottom of the tab there are two buttons for moving to the previous and next paragraph sections for the question. These buttons are only active if the question is a multi-part question.

Editing Survey Data




Index Tab

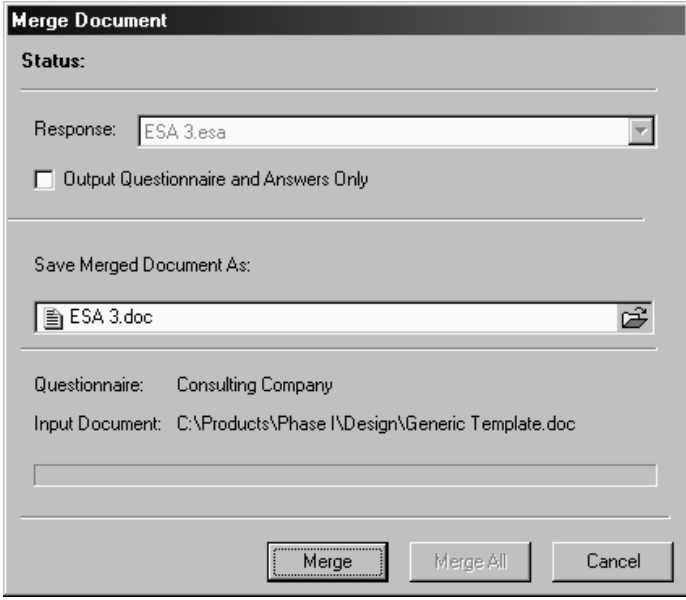
The Index tab shows a list of all of the questions divided into sections and subsections. To expand or collapse a section or subsection click on its name. To move directly to a question, double click on it in the index.

When the editing has been completed the form can be closed by clicking on the Save & Close button.

5.6 Merging Survey Data

 To merge a Phase I ESA to create a final report select the survey on the Project form and then click the Merge button. The Merge Document form will be displayed.

This form will let you change the survey being merged and to specify the name of the merged report. There is also the option to merge only the selected survey using the Merge button or all the Phase I ESA surveys in the project using the Merge All button.




The image shows a dialog box titled "Merge Document". It contains the following fields and controls:

- Status:** A section header.
- Response:** A dropdown menu with "ESA 3.esa" selected.
- Output Questionnaire and Answers Only**
- Save Merged Document As:** A section header.
- ESA 3.doc**: A text field with a file icon on the right.
- Questionnaire:** Consulting Company
- Input Document:** C:\Products\Phase I\Design\Generic Template.doc
- Buttons: Merge, Merge All, Cancel

After either the Merge or Merge All buttons has been clicked, the progress of the merge operation will be shown on the form.

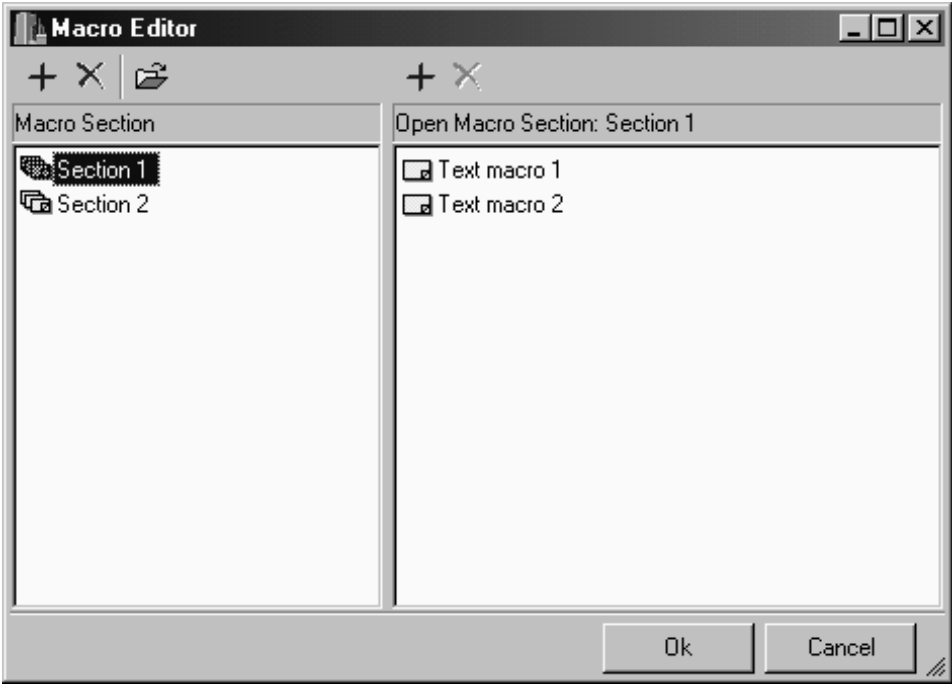
There is also a box that can be checked to “Output the Questionnaires and Answers Only”. When this box is checked, the answers to the Phase I ESA will only be merged with the questions and not with the report template. This will produce a Word document that shows the questionnaire used and its answers. The resulting document can then be included as an appendix in the report or saved as a record of the Phase I ESA field data collection.

5.7 Deleting Survey Data

-  To delete a Phase I ESA survey in the project, select the survey and then click on the Delete button on the toolbar.

6.

Text Macros




6.0 Using Text Macros

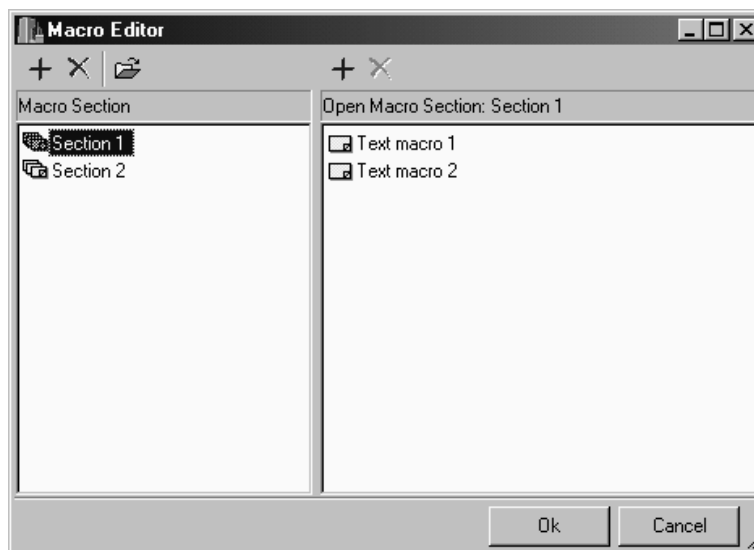
During the data collection process for Phase I ESAs some of the text being entered will be repetitive or best selected from a list of text for different Phase I's; such as site descriptions, staining, storage tank descriptions, asbestos materials, etc. In order to reduce the time required to enter repetitive text, text macros can be used.

Text macros are composed of lines of text (up to 255 characters) that can be selected and inserted whenever there is a description or information part of a question. To make it easier to select the text, the macros are divided into sections.

All of the text macros are entered and edited in the desktop version of the program. These macros are then exported to the Pocket PC when exporting questionnaires.





6.1 Adding and Editing Text Macros

 To add a text macro click on the Macro button on the Project toolbar to display the Macro Editor form. The text macros are divided into sections to make it easier to organize and select the text. Sections are displayed on the left side of the form and the text for the selected section is displayed on the right side.






Adding and Editing Text Macros

Sections


-  To add a new section click on the Add button above the sections and then enter the name of the section.
-  To delete a section select the section and then click on the Delete button above the section.
-  To open an existing section click on the Open button above the section. The text macros for that section will then be displayed on the right part of the form.
-  To rename a section select the section and then double click on the name.

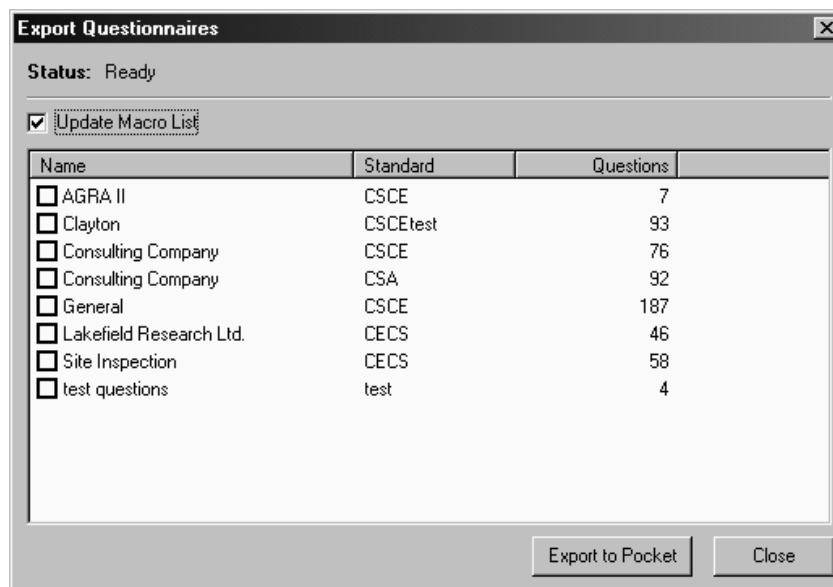
Text Macros

-  To add a new text macro to a section, make sure that the section is open and then click on the Add button above the text macros. Then enter the text for the macro.
-  To delete a text macro from a section, make sure that the section is open . Then select the text to be deleted and then click on the Delete button above the text macros.
-  To change the text for a text macro select the text and then double click on the text.

After the text macros have been added or edited press the Ok button to save them.

6.2 Exporting Text Macros

 The exporting of text macros to the Pocket PC can be done at the same time as the questionnaires are exported or separately. To export text macros to your Pocket PC click on the Export button on the Questionnaire toolbar. The Export Questionnaires form will be displayed. Make sure that the Update Macro List box is checked and any questionnaires that you also want to export.



Name	Standard	Questions
<input type="checkbox"/> AGRA II	CSCE	7
<input type="checkbox"/> Clayton	CSCEtest	93
<input type="checkbox"/> Consulting Company	CSCE	76
<input type="checkbox"/> Consulting Company	CSA	92
<input type="checkbox"/> General	CSCE	187
<input type="checkbox"/> Lakefield Research Ltd.	CECS	46
<input type="checkbox"/> Site Inspection	CECS	58
<input type="checkbox"/> test questions	test	4

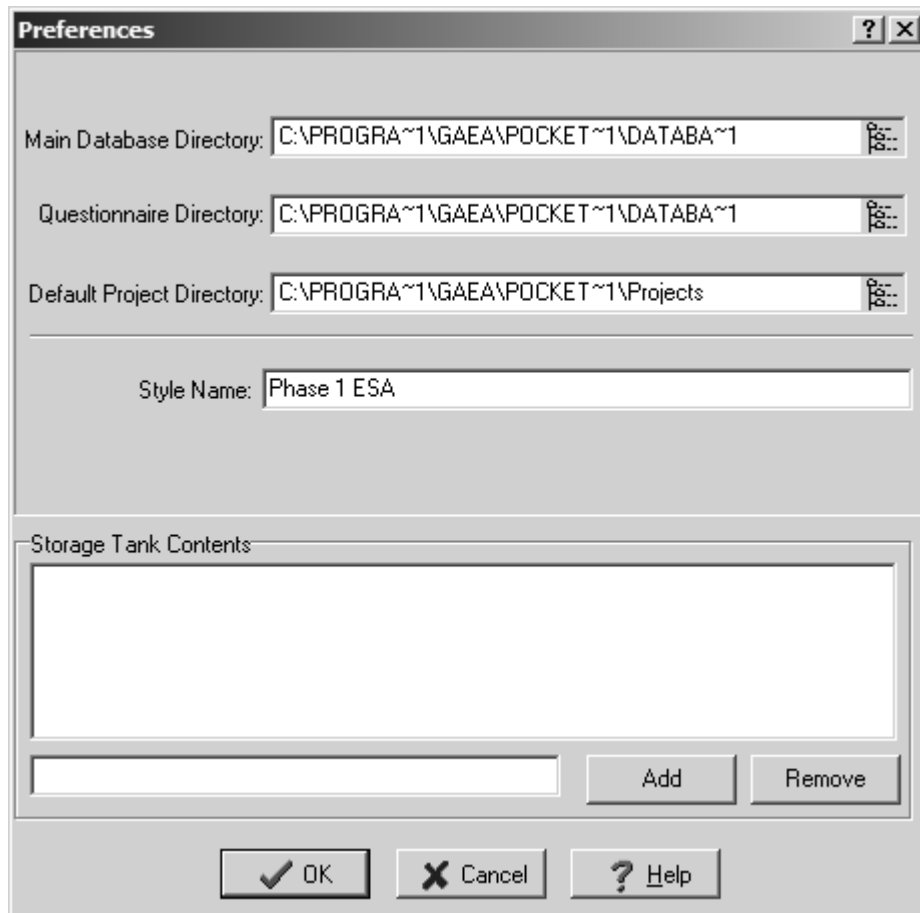
Before clicking the Export to Pocket button on the form make sure that your Pocket PC is connected to the desktop.

6.3 Using Text Macros

Macro Text macros can be used when collecting Phase I ESA data on the Pocket PC whenever a question has a description or information box. To insert the text from a text macro into the question's answer click on the Macro button at the bottom of the form. A form will then be displayed showing all of the available macro sections and text macros. Select a text macro from the form by clicking on it.

7.

Preferences



7.0 Setting Program Preferences

The locations of the databases, styles name, and storage tank contents can be specified using the program preferences. To change the program preferences select the Preferences menu item from the File menu. The Preferences form below will be displayed.

Using this form you can specify the following:

Main Database Directory: This is the directory where the Access database containing the list of projects and other information is stored.

Questionnaire Directory: This is the directory where the Access database containing the questionnaires is stored.

Default Project Directory: This is the default directory where projects are stored.

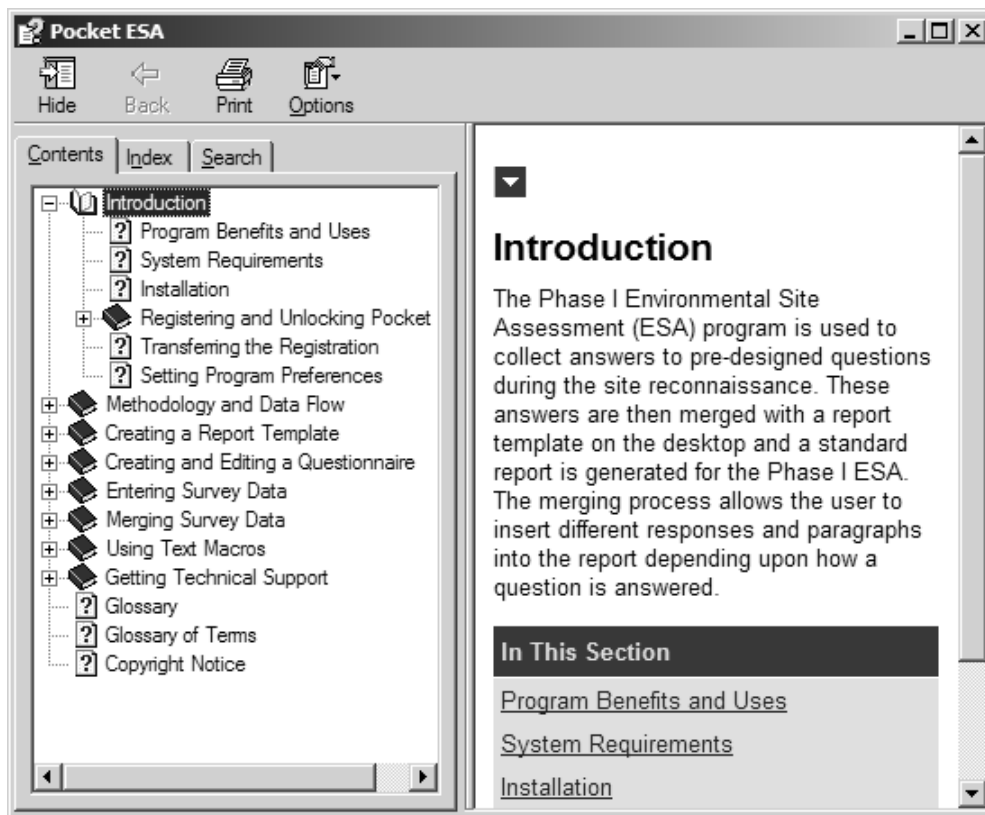
Style Name: This is the name of the style in Word to use for the merging process.

Setting Program Preferences

Storage Tank Contents: This is a list where you can specify the contents for storage tanks that can be selected on the Storage Tank form for a questionnaire.

8.

Help



8.0 Getting Help

Pocket ESA uses the latest type of help system for Microsoft Windows called HTML Help. This help system uses a similar style of display as Internet Explorer.

The Help System can be used to find information on-line rather than by using this manual. Both sources will provide the same information, but are organized somewhat differently. Help will appear in a separate window with its own menu bar and controls as shown below.

This chapter describes how to:

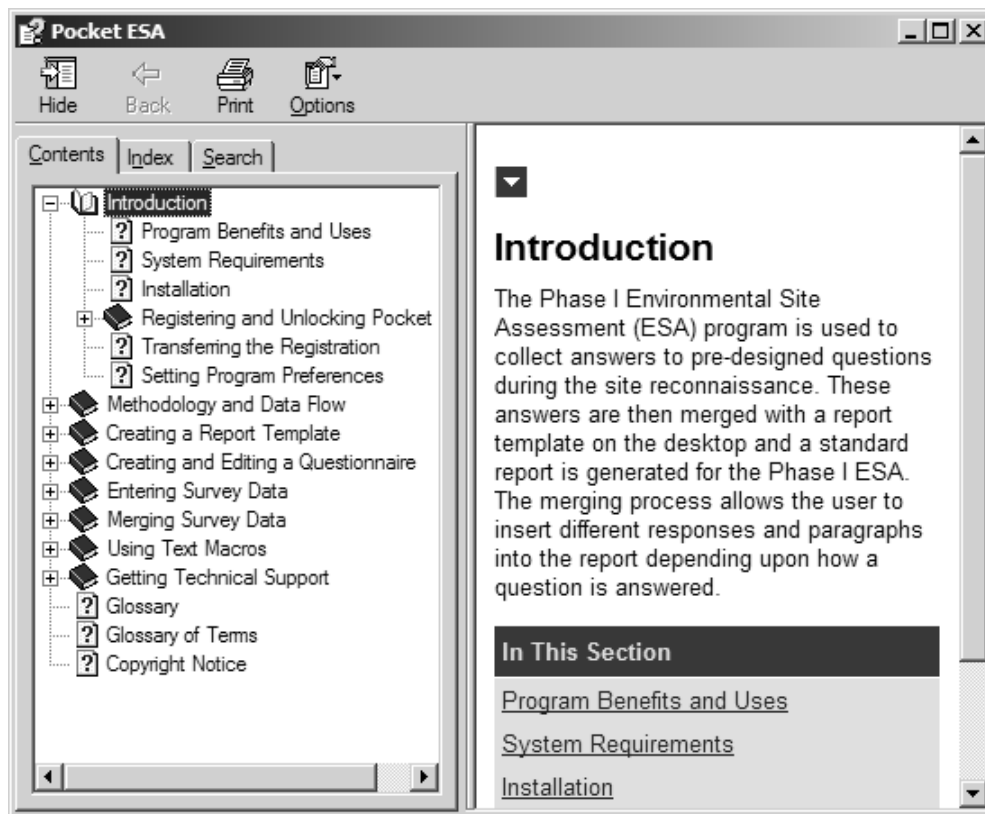
1. Display help
2. Use help
3. Get technical support
4. Upgrade

These tasks can be performed using menu commands on the Help menu shown on the previous page. The Transfer Registration menu item is explained in Chapter 1 Getting Started.

8.1 Displaying Help

There are several ways to access the Help System, these are:

- Press the Help button. To display the help contents at any time press the help button on the Toolbar.
- Click a Help button in a form. For more information on using a particular form click the Help button.
- Choose a command from the Help menu. The Help menu offers several options:
 - Contents displays the same Help Contents that appear when you press F1 with no commands highlighted.
 - Search displays the Search dialog box and a list of keywords you can use to find topics.
 - About WinFence gives information about the program, including the 3-digit version number required by technical support.



8.2 Using Help

You can move back and forth between topics or search through the entire help system for the topic you want. Topics that are underlined can be displayed by clicking on them, and topics that have dotted underlines can have their definition displayed by clicking on them.

The tabs on the Help form are used for the following:

- **Contents** displays the complete Table of Contents of the Help System.
- **Index** is used to look for help topics listed by keyword.
- **Search** can be used to search for a specific help topic by one or more keywords.

8.3 Getting Technical Support

GAEA offers a variety of services to help you with your questions and problems. You will be automatically registered when you obtain an unlock code for the program. Free technical support to registered users for the first three months includes assistance in the use of the software and in getting any bugs you may find in the software fixed.

To expedite support services, we prefer electronic communications, through email or the Internet. These communications minimize the possibility for any mistakes, and allow us to better track your request. You can email technical support by selecting the Email Technical Support menu item from the Help menu. This menu item will create an email message using your default email program.

To connect to GAEA's Internet site, select the GAEA's Web Site menu item from the Help menu.

Below are the various methods to contact technical support:

<u>Service</u>	<u>Contact Method</u>
Web Site	http://www.gaea.ca
E-mail	support@gaea.ca
Phone	(905) 666-7527
FAX	(905) 666-3744
Mail	GAEA Technologies Ltd. 87 Garden Street Whitby, Ontario Canada L1N 9E7

After receiving your communication, GAEA will respond promptly with either the solution to the problem or a schedule for solving the problem.

8.4 Before Contacting GAEA

Before contacting technical support, we suggest you try the following to help us resolve your problem.

- Determine if the problem is specific to the cross-section you are creating. Does it occur with other templates or other cross-section?
- Does the problem occur every time or intermittently?
- If you have another PC, does the problem occur on it?

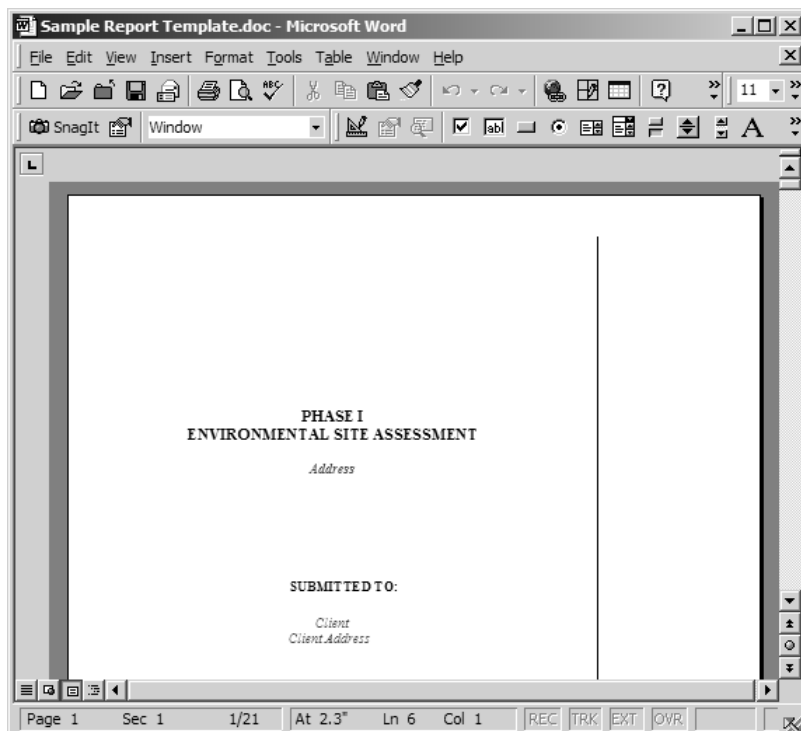
Example

The Pocket ESA program has been designed to minimize the amount of time required to generate a standard report and to maximize the flexibility of the final report. To accomplish this the process has been divided into four steps. The first two steps only need to be performed once for each type of questionnaire and report. The last two steps are performed for each Phase I ESA. These steps are illustrated in the following example.

This example shows briefly how to edit a report template, edit a questionnaire, create a new Phase I ESA, and how to merge the ESA with the report template to create a final report. The example is provided as a quick tutorial and is not meant to represent a complete Phase I ESA.

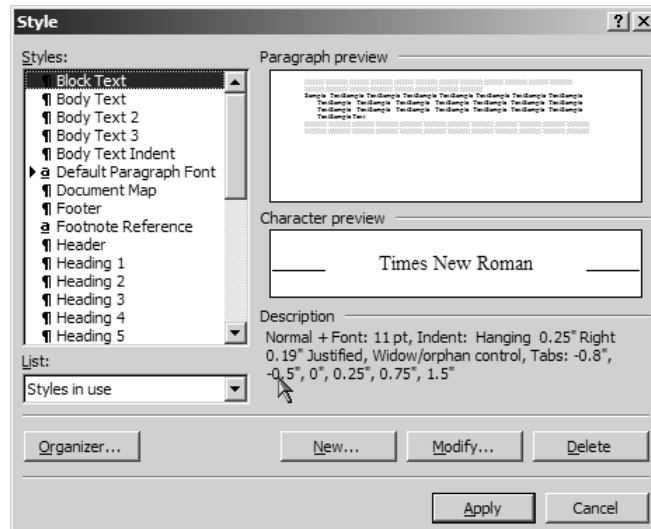
Step 1 Edit Report Template

The first step is to create a report template using Microsoft Word. This template is later merged with the specific responses of a Phase I ESA to create a final report for the survey. The easiest method to create a report template is to edit a copy of an existing Phase I ESA report in Word.



Example: Edit Report Template

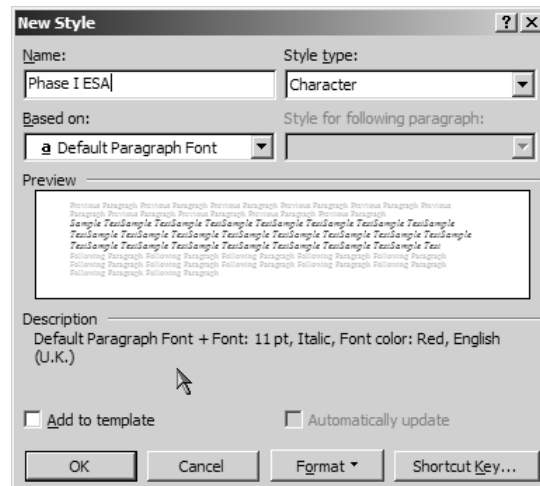
For this example, an existing report template will be edited. The file name for the report template is “Sample Report Template.doc”. This file is provided with the Pocket ESA program. When the file is opened in Word it will be displayed as shown above.



If a keyword style for the Pocket ESA program has not been created, it should be created first before the report template is edited. To create the keyword style, select the Style menu item from the Format menu in Word. A Style form similar to the one above, will be displayed.

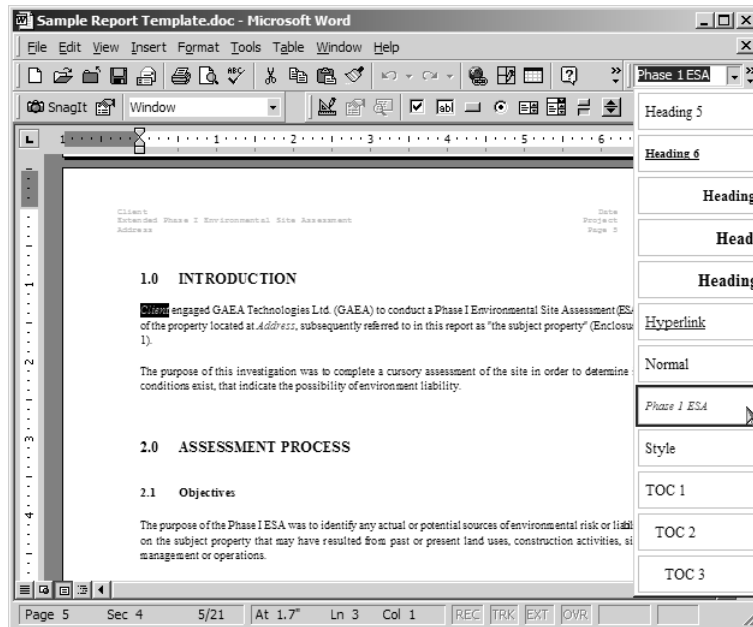
To create a new style, click on the New button on the Style form. On the New Style form, enter the name of the style, type of style, and modify the font as desired. It is recommended that the style name be “Phase I ESA” and that the style type be “Character”. You may also want to make the style font be bold italic and the color red, so that it stands out in the document.

After the style has been created, the style should be assigned to the keywords in the report that will be used in the merging process.

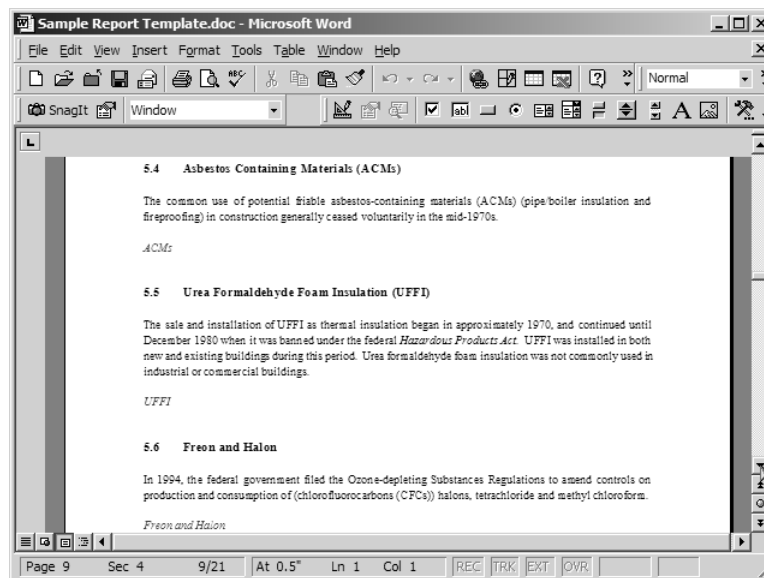


Example: Edit Report Template

To assign the “Phase I ESA” style to a keyword or keywords, select the keyword and then select the style from the Style combo on the toolbar in Word.




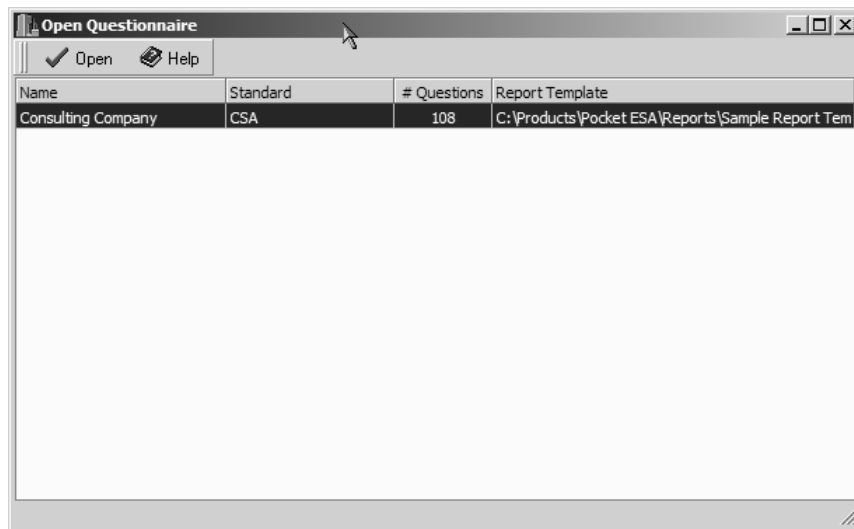
The keyword can contain one or more words (such as “Client”) that will be substituted during the merging process or they can be used to represent entire paragraphs that will be substituted (such as “ACMs”).



Step 2 Edit Questionnaire

After the report template has been edited the next step is to create a questionnaire that is used to collect the site reconnaissance data of a Phase I ESA. This questionnaire will assign a keyword specified in the report template to each question. The text associated with the answer to that question will then replace the keyword when the actual Phase I ESA data is merged to create a final report.

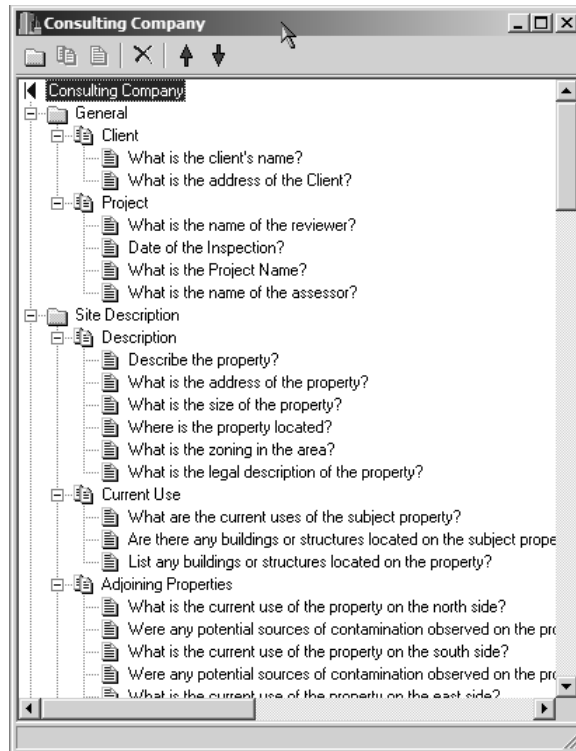
 In this example we will edit the questionnaire “Consulting Company” that is provided with the Pocket ESA program. To open the questionnaire, click on the Open Questionnaire button on the Questionnaire toolbar. The Open Questionnaire form below will be displayed. Select the “Consulting Company” questionnaire and press the Open button.



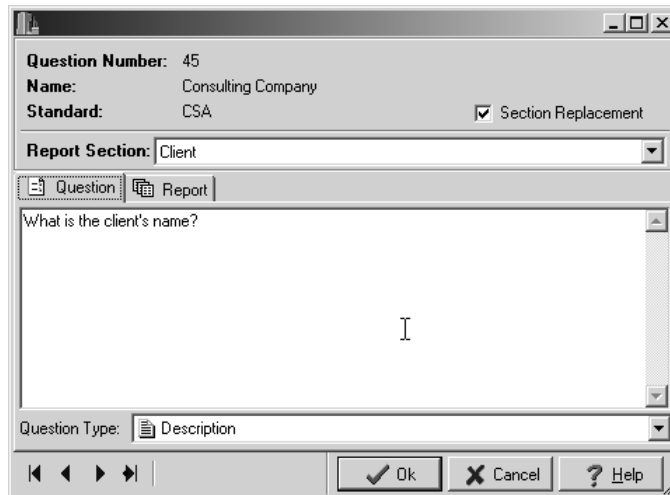
When the questionnaire is opened, a copy of the report template will be scanned in Word to locate all of the keywords. These keywords will then be available within the questionnaire. If changes to the keywords are made in the report template using Word while the questionnaire is opened, the questionnaire will need to be closed and re-opened to be updated with these changes.

After the questionnaire is opened it will be displayed as shown on the next page. Questionnaires are divided into sections and subsections which can contain any number of questions. Questions can be edited by double-clicking on them.

Example: Edit Questionnaire



In this example we will edit the first question, "What is the client's name?". To edit this question double-click on it in the list. The question will be displayed as shown below.



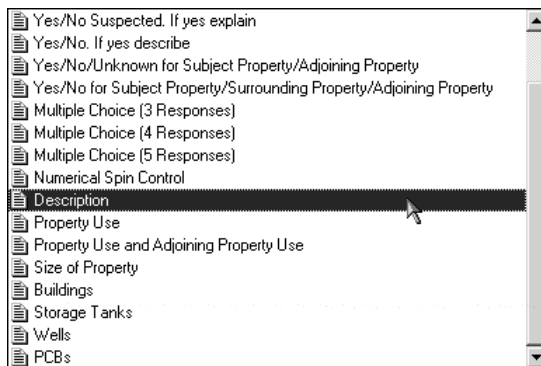
Example: Edit Questionnaire

At the top of the form, shown on the previous page, there is a combo box where you can select the Report Section. When the arrow on the right is selected a list of keywords that have been entered in the report template will be displayed.



A keyword from the list must be selected for the question. This keyword will determine where the text results of the question will be placed in the report when it is merged. If no keyword is selected the results of the question will not appear in the report. In this example the “Client” keyword is selected.

Also at the top of the form is a checkbox for Section Replacement. If the box is checked, during the merging of the report any instance of the keyword (“Client”) will be replaced with the answer text. If the box is not checked, during the merging of the report the answer text will only be inserted below the first instance of the keyword and the keyword will be left in place. In this example we will use section replacement so that all of the keywords “Client” are replaced by the answer text.



On the Question tab, the question text and question type are specified. The question type determines the format of the question and allowable answers that are used to collect the data on the Pocket PC. There are numerous question types that can be selected.

As the selection in the list is moved the question type will be previewed on a form beside the Question form.

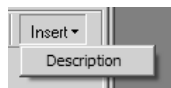
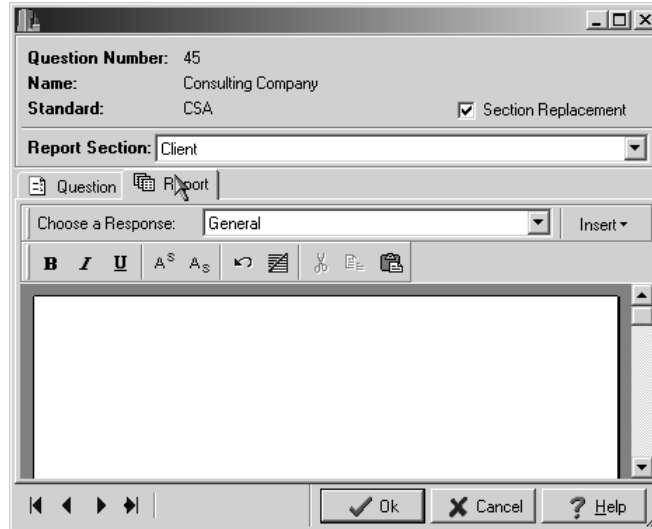
For this example the question type is “Description”.

After the question text and type have been specified, the text associated with each allowable response is entered on the report tab, shown on the next page. This is the text that will actually be merged into the final report.

The allowable responses for a question depend upon the question type. For the “Description” question type there is only one allowable response, that is called “General”. Whereas, for a “Yes/No” question type there would be two available responses or for a “Multiple Choice 3 Response” question type there would be 3 responses.

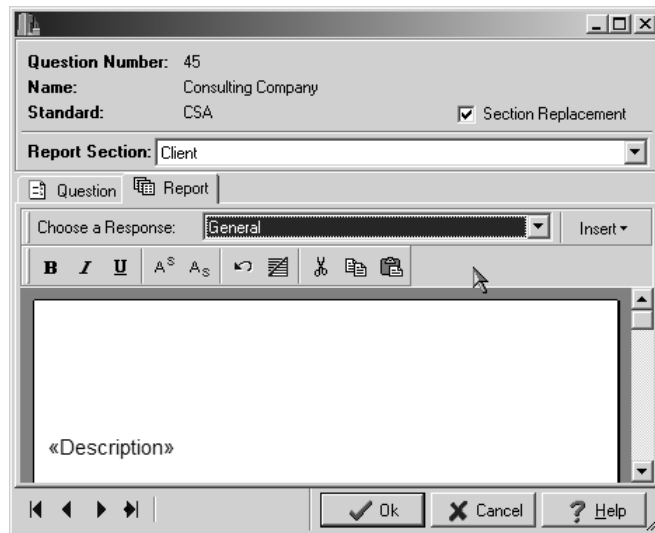
To select a **response** click on the arrow to the right of the input box, a list of available responses will be displayed. The available responses will depend on the type of question.

Section Name
Example: Edit Questionnaire



The **Insert** button allows for the insertion of text that was entered when the question was answered on the Pocket PC. For example, this text could be entered as the “Description” for the question.

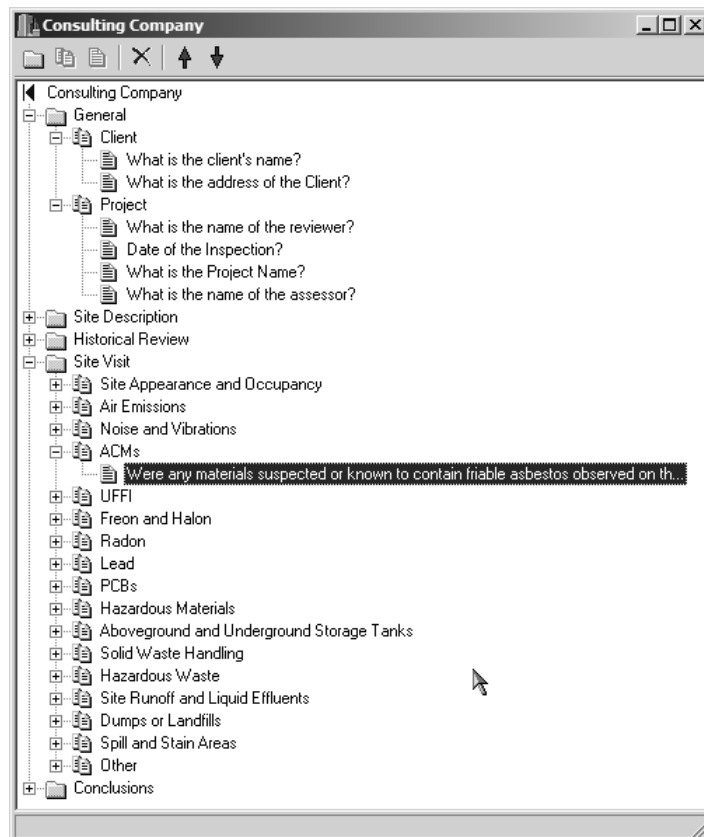
When the Insert button is pressed a list will be displayed showing the types of text that could be entered with the question on the Pocket PC. To include the text that was entered on the Pocket PC in the associated text of the question, position the cursor in the text input box where you want the inserted text to appear and then click on the Insert button and select it from the list.



Example: Edit Questionnaire

Below the response selection is a **Rich Text toolbar** and input box, these are used to enter the text associated with the selected response. The text associated with the response can be as simple or as complicated as desired. There is no practical limit to the length of the text. In this question, we will only use the answer provided by the user for the client's name.

The question for the client's name is a very simple type of question to create. A more complicated question would be for Asbestos Containing Materials (ACMs). To edit this question, expand the section on the Site Visit in the questionnaire and then double click on the question under ACMs, "Were any materials suspected or known to contain friable asbestos observed on the property?".



After the question is double-clicked on the questionnaire form, it will be displayed as shown on the next page.

Example: Edit Questionnaire

Question Number: 79
Name: Consulting Company
Standard: CSA Section Replacement
Report Section: ACMs

Question Report

Were any materials suspected or known to contain friable asbestos observed on the property?

Question Type: Yes/No/Unknown/NA

Ok Cancel Help

The question type this time is more complicated than the client question and is “Yes/No/Unknown/NA”. To see how this question will look, click on the Preview button at the bottom of the question form.

This question has four possible responses (Yes, No, Unknown, and Not Applicable) and also can contain Additional Information. The text to be merged into the final report can be different for each of these responses.

Preview

New Question

Yes No
 Unknown N/A

Additional Information

To enter the text for each of the four possible responses, click on the Report tab on the Question form, as shown on the page. Then select the response by clicking on the arrow next to the “Choose a Response” box. In the example below we will enter the text for the Yes and No responses. The text for the Unknown and NA responses would be entered the same way. To include the Additional Information from the question, use the Insert button.

Example: Edit Questionnaire

Question Number: 79
Name: Consulting Company
Standard: CSA Section Replacement
Report Section: ACMs

Question Report

Choose a Response: Yes No Unknown N/A

B *I* U A^S A

◀ ▶ ⏪ ⏩ + × Preview Ok Cancel ? Help

Question Number: 79
Name: Consulting Company
Standard: CSA Section Replacement
Report Section: ACMs

Question Report

Choose a Response: Yes

B *I* U A^S A_S ↶ ↷ ✂ 📄 📁

Additional Information

Based on the age of the building (prior to 1975) asbestos containing materials may be present within some building materials. Materials that may contain asbestos include drywall joint compound, mechanical insulation, roofing materials, floor and ceiling tiles, and fire doors.

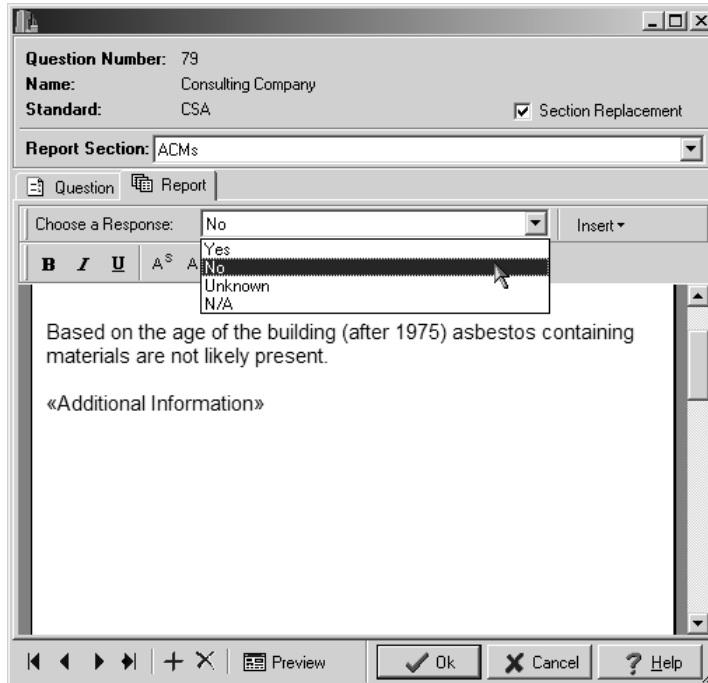
The following materials were observed on the subject property and may contain asbestos:

«Additional Information»

◀ ▶ ⏪ ⏩ + × Preview Ok Cancel ? Help

Example: Edit Questionnaire


After the text for the Yes response has been entered, the text for the No response can be entered by selecting it using the “Choose a Response” box. Notice that the text is completely different than the text for a Yes response.



The text for the responses in the ACM question is much different than for the client question. In the client question, the client’s name that is entered is used to replace the Client keyword in the report. This replacement is for the name only and can occur in the middle of sentences in the report.

The text for the ACM question is used to replace the ACMs keyword in the report and is designed to be an entire paragraph or more. By simply having the user select Yes or No, entirely different paragraphs are added to the report. This technique can be very powerful and can substantially reduce the amount of information that has to be input by the data collector, as well as be used to standardize the information in reports.


After the text for all of the responses has been entered, the changes to the question should be saved by clicking on the Ok button.

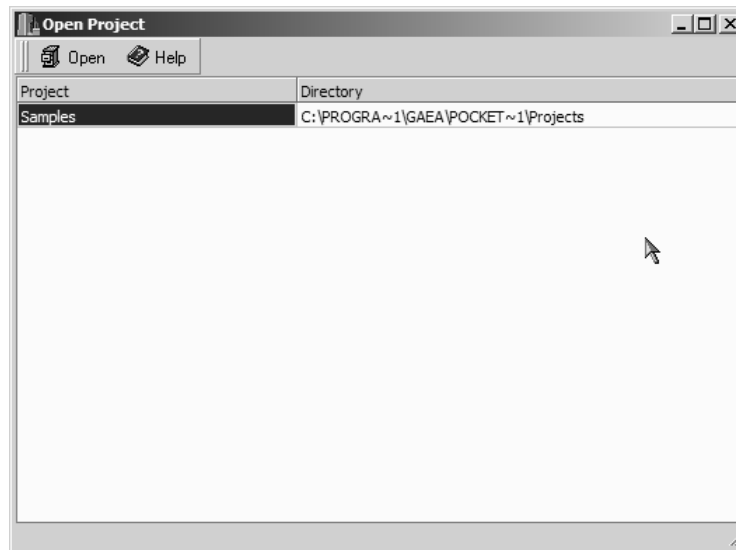
 When you are finished editing the questions in the questionnaire, the changes should be saved by clicking on the Save button on the Questionnaire toolbar.

Step 3 Creating a Phase I ESA

After the questionnaire has been downloaded to the Pocket PC, it can be used to collect the Phase I ESA reconnaissance data in the field. Alternatively, the Phase I ESA can be created directly on the desktop, avoiding the necessity of downloading the questionnaire and uploading the Phase I data. In this example, we will enter the Phase I data directly on the desktop. This method can also be used to edit the information that was collected on the Pocket PC.

The Phase I ESA surveys are grouped into projects. Projects typically contain associated Phase I ESAs, and may contain one or more surveys. In this example, we will store the new Phase I ESA in the “Samples” project that is supplied with the program.

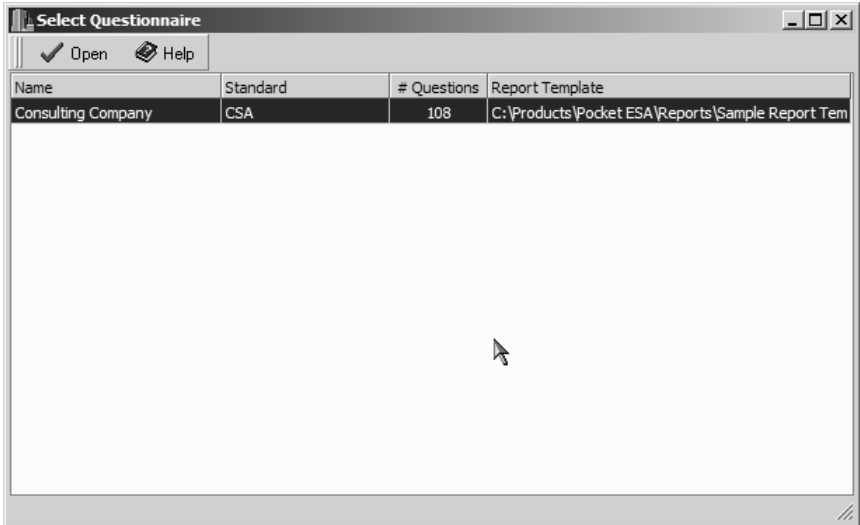
 To open the “Samples” project click on the Open Project button on the Project toolbar. The Open Project form below will be displayed. Select the “Samples” project and press the Open button.



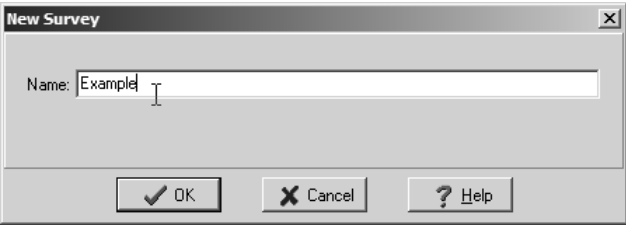
After the project is selected, the Phase I ESA's in it will be displayed on the project form as shown on the next page.

Example: Creating a Phase I ESA

+ To create a new Phase I ESA, click on the Add button on the project form. The Select Questionnaire form below will then be displayed. Select the “Consulting Company” questionnaire and then press the Open button.

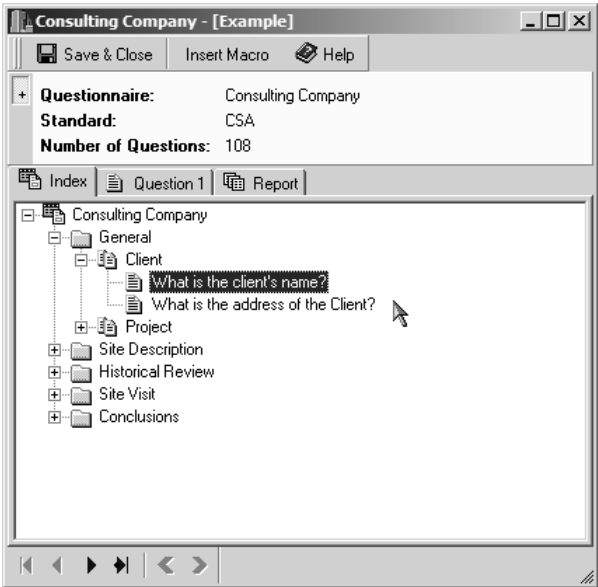


After the questionnaire has been selected the New Survey form below will be displayed. Enter the name for the new Phase I survey and press the Ok button.



The new Phase I survey will then be displayed on the Survey form on the next page. A menu tree on the form displays the sections, subsections, and questions specified in the questionnaire used for the Phase I ESA. Sections in the menu tree can be expanded and collapsed by double clicking on the section name. When the section is collapsed only the section is displayed and the subsections are hidden. When the section is expanded all of the subsections are displayed below the section.

Example: Creating a Phase I ESA

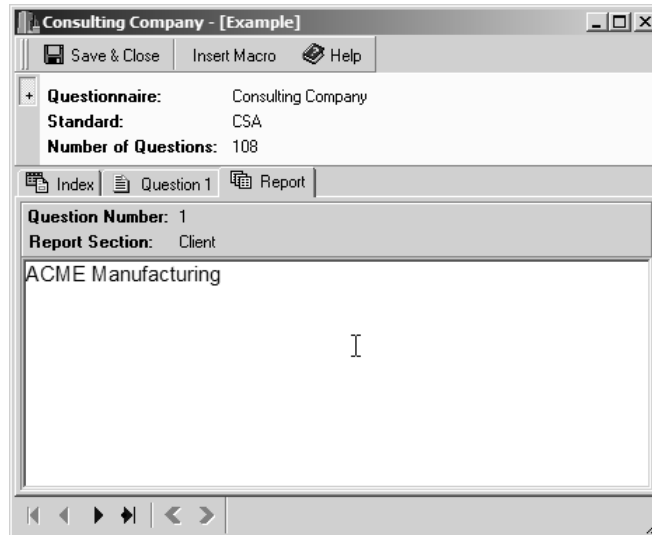


The Phase I ESA data for each question can be entered by selecting the question from the menu tree. The question will be displayed on the Question tab as shown below. Enter the answer to the question on this tab. In this example, enter the Client's name.

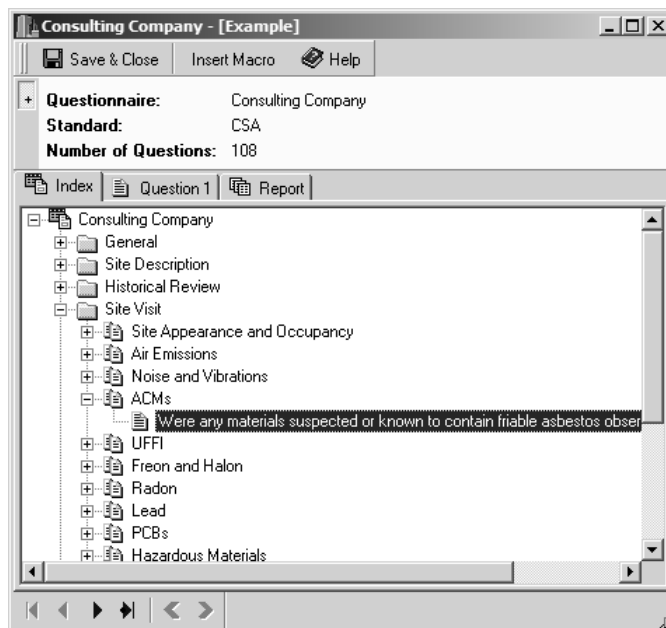


Example: Creating a Phase I ESA

The Report tab shows how the answer to the question will be merged into the report template. In this example the “<Description>” for the question was replaced by the text “ACME Manufacturing”, as shown below.



The question on ACMs can be answered the same way. First, double-click on it from the list of questions on the index tab shown below. The question will then be displayed on the Question tab shown on the next page.

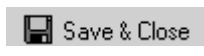


Example: Creating a Phase I ESA

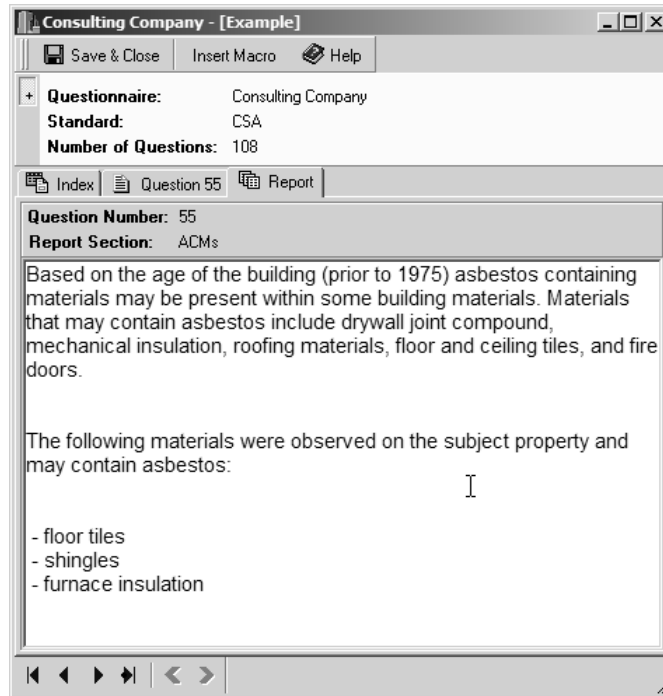
The answer to the question can be entered by clicking on Yes, No, Unknown, or N/A and then entering any additional information. In this example, the answer will be Yes (there are ACMs suspected) and the additional information will be materials suspected to contain asbestos.

The text that will be merged into the report for the Yes answer is displayed on the Report tab shown on the next page. This response will contain the text entered in the questionnaire for a Yes answer plus the additional information entered by the user (in this case the suspected materials).

The response shown on the report tab can be accepted as shown or the text can be edited prior to being merged into the final report. This editing could include highlighting the materials, adding additional information, or adjusting the format.

 Save & Close After all of the questions have been answered, click on the Save and Close button at the top of the form to save the Phase I ESA data.


Example: Merging the Phase I ESA



Step 4 Merging the Phase I ESA

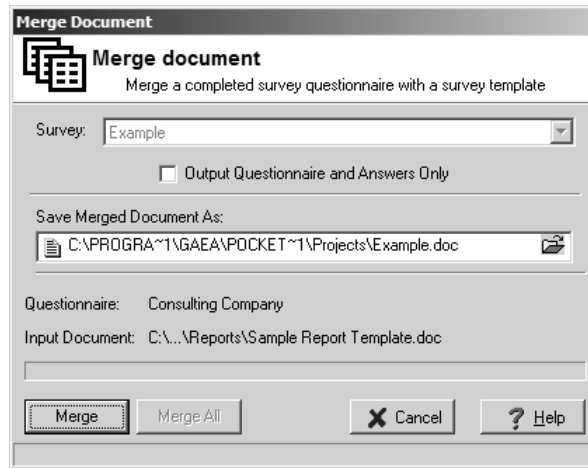
After the Phase I ESA data has been collected on the Pocket PC or desktop it can be merged with the report template to create the final report. During the merging process the keywords in the report template are replaced by the text associated with each of the answers to the Phase I ESA questions.

When the merging is complete a final report will be created in Microsoft Word format. This report can then be edited in Word to include the information regarding the records reviews and interviews.

 To merge the Phase I ESA to create a final report select the “Example” survey on the Project form and then click the Merge button. The Merge Document form on the next page will be displayed.

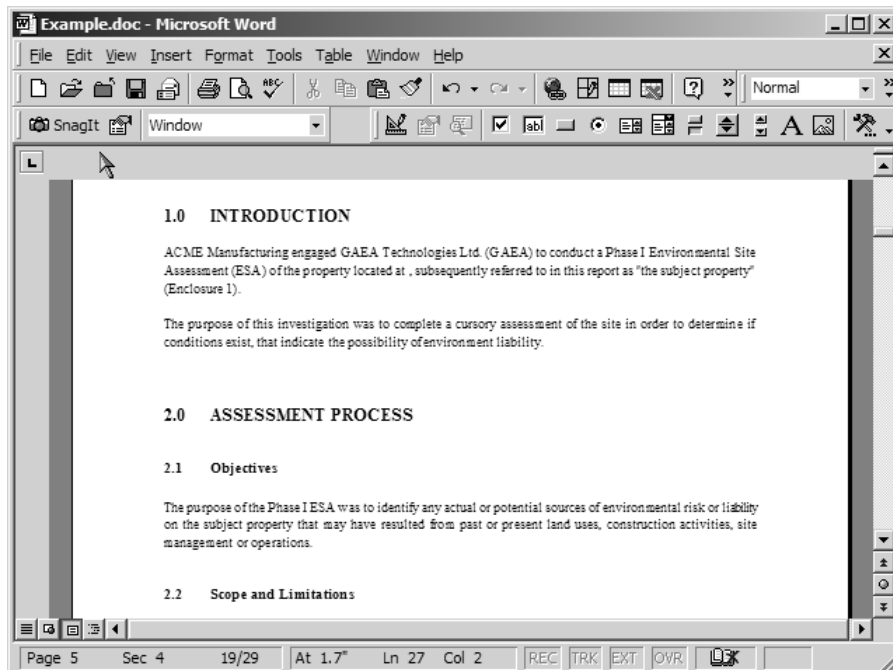
This form will let you change the survey being merged and to specify the name of the merged report. In this example the output report will be saved as “Example.doc”.

Example: Merging the Phase I ESA

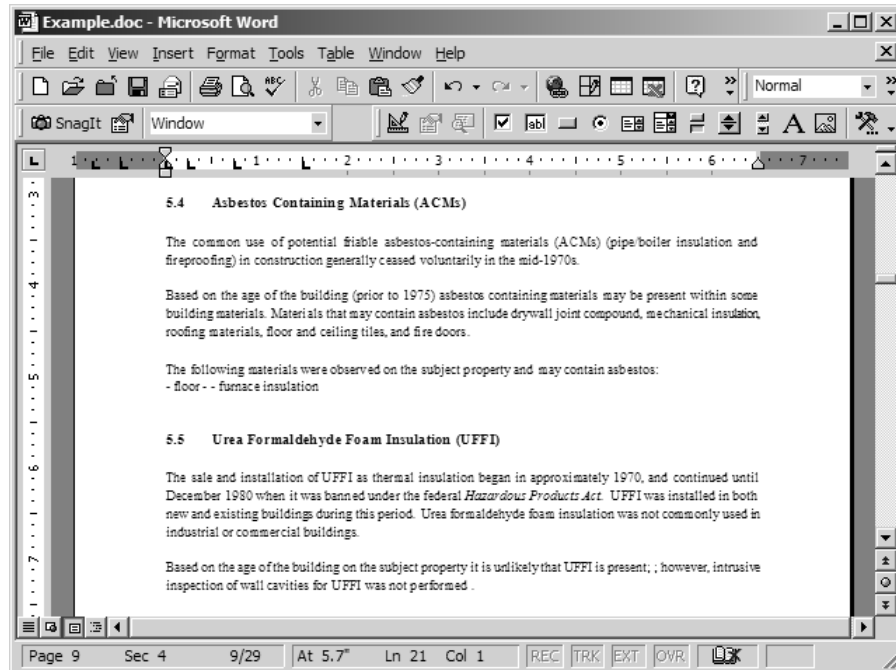


After the Merge button is pressed, the report document will be created in Word and a message box will ask whether to open the report in Word.

The resulting report will have the responses provided merged with the report template as shown below.



Example: Merging the Phase I ESA



Glossary

Merging: The process where the results of a Phase I ESA is merged with a report template to create a final report. During the merging process the keywords in the report template are replaced by the text associated with each of the answers to the Phase I ESA questions.

Phase I ESA: The purpose of a Phase I Environmental Site Assessment (ESA) is to identify actual and potential site contamination. This involves the evaluation and reporting of information collected through records review, site visits, and interviews. Phase I ESAs are conducted to identify environmental liabilities for property transactions; identify certain baseline environmental conditions; assist in meeting regulatory requirements; and as an initial step in site remediation. In this manual the word “Survey” is also used to designate a Phase I ESA.

Pocket PC: A small portable computer with a 320x240 resolution screen running the Windows CE 3.0 operating system. Typical models are Compaq iPAQ, HP Jornada, Dell Axim, and Casio Cassiopia.

Project: A group of Phase I ESAs collected on the same property or for the same client. All Phase I ESAs are organized into projects.

Questionnaire: A questionnaire is a group of questions that are used to collect the site reconnaissance data of a Phase I ESA. Typically, the questionnaire will adhere to a national standard such as the CSA or ASTM standards. However, abbreviated questionnaires may be created and used in some situations. After a questionnaire has been created it can be downloaded to the Pocket PC and used for numerous Phase I ESAs.

Question Type: The question type determines the format of the question and the types of answers that are allowed. Currently there are 19 types of questions.

Report Template: The report template is a generic form of the final report and contains keywords where the specific answers to the questionnaire are to be merged into the report. These keywords are highlighted in the report template using a unique style created for the Phase I ESA program.

Section Replacement: If a question has section replacement, during the merging of the report any instance of the section heading (keyword) will be replaced with the answer text. If the question does not have section replacement, during the merging of the report the answer text will only be inserted below the first instance of the keyword and the section heading (keyword) will be left in place.

Standard: In North America there are two standards for conducting a Phase I ESA, these are CSA 764-94 Phase I Environmental Site Assessment and ASTM E1527 Standard Practice for Environmental Site Assessments: Phase I Environmental Site Assessment Process. The vast majority of firms in North America use a standardized report based upon one of these standards.

Glossary

Text Macro: Text macros are composed of lines of text (up to 255 characters) that can be selected and inserted whenever there is a description or information part of a question.

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