

FORMS II Lite™
Version 5.1

User's Guide

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Section 1

FORMS II Lite Basics

Getting started in FORMS II Lite is as easy as clicking the New Site icon and typing in information about a Site. But to get the most out of the FORMS II Lite experience, the user should understand the basic concepts behind the FORMS II Lite work area and how to choose options that best fit the necessary working style.

Application Design

FORMS II Lite is designed in a Wizard-like format to follow the flow of data collection in the field. The application brings the user through an eight-step process to ultimately generate labels and/or create Traffic Report/Chain-of-Custody (TR/COC) reports.

Required fields for each screen are labeled in red text. These red required fields must be completed to move through the application.

FORMS II Lite can be customized to fit different user preferences. Most fields and options can be enabled/disabled, added, or changed by using the Customize function on the Main Menu Bar.

Multiple Selections

Select multiple, sequential items by clicking on the first item, holding down the **[Shift]** key on the keyboard, and dragging the mouse up or down to highlight additional items.

Select multiple, non-sequential items by clicking on each item while holding down the **[Ctrl]** key on the keyboard.

Cut, Copy, Paste

Right click on any field to select Cut, Copy, or Paste functions. Use the following keyboard shortcut keys to Cut, Copy, or Paste text. Press **[Ctrl]** and then the appropriate letter for each shortcut:

Cut	[Ctrl]	[X]
Copy	[Ctrl]	[C]
Paste	[Ctrl]	[V]

Close Button

The **[Close]** button closes the current Site. After clicking the **[Close]** button, a dialog box will appear. Select “Yes” to exit or select “No” to return to the data entry screens. Information that has been entered up to this point has already been saved.

Drop-down Box Style Data Entry Fields

Entry fields with a down arrow button indicate a drop-down menu of available items. Some drop-down boxes allow the user to either select from the list or type a new item directly into the field. However, to permanently save items to any list, the user should add them through the Reference Tables. This makes the item available to all sites. Reference Tables are only available under the Customize option on the Main Menu Bar, when a site is closed.

Sorts

The Sort function organizes and lists user data in either ascending or descending order. Click on any column header within most window views to sort data in ascending order. Select the same header again to sort in descending order.

Secondary Sorts

This Secondary Sort function is available in Step 6, Step 7, Customize TR, and QuickView. Click on any column header within most window views for an ascending or descending primary sort. Click on any other header to activate a secondary sort of the data.

Copy Station/Copy Location

Use the copy functions if there are multiple Stations/ Locations with similar data information. Duplicating Stations or Locations is a convenient tool that reduces keystrokes and data entry. Enter all of the Station's data and all the Location data associated with it. Clicking on the **[Copy]** buttons will duplicate all data "x" number of times and the user can edit the data where necessary. The copy functions will copy the Station or Location, its measurements and any associated data along with its measurements. No other data is copied after Step 4.

1. Create or select a Station or Location to be copied.
2. Click on the appropriate **[Copy]** button and the *Copy Station Information* or *Copy Location Information* window will display.
3. Enter the number of duplicate copies desired then click **[OK]**. The application copies the selected Station or Location in sequential order. Once copied, the user can rename a Station or Location by selecting it from the *Select Station* windows and typing over the name.
4. When renaming a Station or Location a warning message will appear to remind the user that they are making a permanent change to the data. Click the **[Yes]** button to confirm the message, otherwise click the **[No]** button.

STEP 5: Assign Bottles

Analyses are assigned to bottles (containers) for each Station Location. Per user settings, sample and tag numbers are appropriately assigned by the system.

Step Five: Assign Bottles - EXAMPLE SITE

Select Station/Location

Station	Location	Matrix
STATION ONE	LOCATION ONE	Industrial Effluent Wastewater
STATION ONE	LOCATION TWO	Ground Water
STATION TWO	LOCATION ONE	Industrial Process Wastewater

Select Analysis

X	Analysis	Program Code	Turnaround
X	Aluminum	Inorganics	21
X	Barium	Inorganics	21
X	Calcium	Inorganics	21
X	Chromium	Inorganics	21
X	CLP TAL Total Metals and C...	Inorganics	21

Number of Bottles: 1
Tag Prefix: Tag
Starting Tag#: 247
Next Available CLP#: C0034
Auto Increment Tag#:
Use CLP Sample Numbers: **Use Location Name as Non-CLP Number:**

Assigned Analysis with Sample number

Sample Number	Prefix #	Tag #	Preservative	Lab QC Type	Analysis	Comments
MC0077	6	497			Aluminum	

All fields in Red are required

Generate Labels One-Step Printing Close < Back Next > Weights QuickView

1. Click on the desired Station/Location in the top *Select Station/Location* window. All Analyses associated with the Site appear in the *Select Analysis* window.
2. Follow this sequence to assign bottles:
 - Select the Analysis(es).
 - Enter the Number of Bottles for the particular analysis or set of analyses.
 - Enter the Tag Prefix, Starting Tag #, and Next Available CLP #, in the appropriate fields. Once the user enters the initial number for the Next Available CLP #, the system will automatically generate the next number and remember the last number used for the next session.
 - If necessary, click the Auto Increment Tag # checkbox to automatically increment the *Starting Tag #*.
 - If necessary, click the checkbox for the application to Use CLP Sample Numbers for CLP samples and analyses, or to Use Location Name as Non-CLP Number for non-CLP samples and analyses. The user could also check both boxes to tell the system to use both CLP and non-CLP Sample Numbers.

NOTE: For CLP Inorganic samples, the system automatically places an "M" before the Sample Number once it has been assigned.

NOTE: All samples at the same location are automatically assigned the same Sample Number.

3. There are three methods for assigning analyses to bottles (containers):
 - To assign a single analysis - click once on an analysis in the *Select Analysis* window and click the **[Assign]** button.
 - To assign multiple analyses to a single container or a set of containers - click on the first analysis, hold down the **[Ctrl]** key and click on the other analyses to be assigned. The users can select as many analyses as they like. When multiple analyses are assigned to one or more containers, a separate record is created for each analysis/container combination.
 - Click the **[Assign All]** button to automatically assign all of the analyses in the *Select Analysis* window to a Station/Location. Each analysis is assigned based on the bottle and preservative defaults set in the Analysis Reference Tables.
4. Once the analysis/container combination is assigned, a record is created in the *Assigned Analysis with Sample Number* window in the lower portion of the screen. The user can edit the Sample Number, Tag Prefix, Tag Number, and enter information for the Preservative and Lab QC Type. Analyses that are assigned to multiple bottles will have their preservative duplicated for all bottles in the *Assigned Analysis with Sample Number* window. This feature speeds the data entry process.
5. Add comments for a bottle by typing them into the Comments field in the *Assigned Analysis with Sample Number* window. The user can also click on the **[...]** button within the field to bring up a *Comment Entry* window. These user comments will only appear on bottle labels or tags when selected. Close the window or click into another field to save the data.

6. Continue to assign analyses as necessary by repeating the procedures in Step 5. Click on the **[Next>]** button to move on to Step 6.

Sample Weights Log

The Sample Weights Log allows the user to enter tared and final weights per bottle to support Method 5035.

1. Click the **[Weights]** button in the lower right corner of the Step 5 screen.
2. Locate the appropriate sample and enter or edit the tared weight and the final weight for that sample.
3. Filter this log in the same manner as QuickView.
4. The user can print the created Sample Weights Log from the final *Print/View a Specific TR* screen.

One-Step Printing

This feature provides the user with a rapid means of printing labels without having to go into the Generate Label Wizard. The user can now print labels in one quick step.

1. Hover the mouse pointer over the **[One-Step Printing]** button to view printing defaults that were set in the Preferences under the Customize option on the Main Menu Bar.
2. Click the **[One-Step Printing]** button to print labels based on the default settings shown.
3. To change the One-Step Printing default settings, close the Site, click on Customize on the Main Menu Bar and click on Preferences. In the *Preferences* screen, select the Step 5 tab. The default settings will remain until changed again by the user.
 - The box next to Show One-Step Printing button should be checked.
 - Choose a Default Label from the drop-down list of label templates.
 - In the *Default # of Copies* box, enter the number of copies to be printed of each page of labels.
 - Select from the drop-down list the Default Print Selection (Current Station Location, Current Station, or Current Site).
 - Click the **[Save]** button, then click on the **[Close]** button.

Generate Labels

The user can generate labels prior to going to a sampling event or while in the field if a portable printer is available.

1. Click the **[Generate Labels]** button in the lower left-hand side of the Step 5 screen to open the *Selected Samples* window. This screen gives the user the opportunity to select samples to be printed. The samples for the current Station Location are selected by default.
2. Select all of the samples for the current Location, Station, or Site, or select/deselect individual samples by clicking the checkbox next to each sample. Click the **[Generate Labels]** button when ready to continue.
3. Select a predefined label template or create a new template. Click on an existing label template to use as is, or edit the format to meet individual requirements. Create a new label template through the Generate Label Wizard by clicking the **[Add New Label]** button.
4. Specify a certain number of labels to skip in the *Number of Labels to Skip* box if there is only a partial sheet of labels.

The Generate Label Wizard


The user can create new label templates, edit an existing label template, or select from existing label templates to print sample labels.

1. Create a new label template by clicking the **[Add New Label]** button. This launches the Generate Label Wizard.
2. Choose from among several standard Avery label sizes. The user can also choose the Unit of Measure (English or Metric) and the Label Type (sheet or continuous). Click the **[Next>]** button.
3. Select the text font, size, and color. Click the **[Next>]** button.

NOTE: Users can print a 3 of 9 Bar Code font on sample labels that uniquely identifies each bottle and can be read by a bar code reader.

4. Choose the data element fields to appear on the labels. Select from the *Available Fields* list on the left and click the right arrow **[>]** button to include the field in the *Prototype Label* window on the right.
5. The user can enter any number of spaces or characters before and after data element fields before choosing another field. Press the **[Tab]** or **[Enter]** keys to go to the next line on the *Prototype Label*.

NOTE: Be aware that the amount of text and number of data element fields that can be included on a label is limited to the printable space of the label based on its dimensions.

6. Continue the process of adding data element fields and text until the *Prototype Label* layout meets your requirements. Click the **[Next>]** button to save the *Prototype Label* as a new label template.
7. Enter a label name to save the new label template for future use.
8. Click the **[Finish]** button to view and/or print the new labels.
9. If the labels appear satisfactory, click the printer icon  to print the labels.
10. To edit the labels being previewed, click the **[Edit Label]** button on the tool bar of the *Label Preview* screen. The user will be returned to the Generate Labels Wizard. Once in the Generate Labels Wizard click the **[<Back]** or the **[Next>]** button to modify the template as necessary. Save the template again to keep the changes.

STEP 6: Assign Lab

The user will relate the Laboratory performing the analyses to the appropriate samples during Step 6.

Step Six: Assign Lab - Example Site

Lab Code:

Sample Number	Matrix	Analysis	Program Code
D0028	Soil/Sediment	CLP TCL Semivolatiles and Pesticides/PCBs	Organics
MD0028	Soil/Sediment	Zinc	Inorganics

Unassign Assign

Sample Number	Matrix	Analysis	Lab
MD0028	Soil/Sediment	Aluminum	CEIMIC
MD0028	Soil/Sediment	Calcium	CEIMIC
MD0028	Soil/Sediment	CLP TAL Dissol...	CEIMIC
MD0028	Soil/Sediment	CLP TAL Total ...	CEIMIC

All fields in red are required fields

Preliminary Results Close < Back Next > QuickView

1. Select a Lab Code from the drop-down list at the top of the screen. This red required field must be filled in to proceed further.
2. To add a Laboratory not in the drop-down list, click on the Add Lab [...] button. The user can also make permanent additions or changes to the drop-down menu by going into the Lab Information Reference Table, available from the Main Menu Bar under the Customize option. Access to the Reference Table is available only when all Sites are closed.
3. Select the Sample/Analyses record(s) from the *Select Samples to Assign* window by clicking to highlight them. Click the **[Assign]** button to assign the record(s) to a Laboratory. This moves the Sample/Analyses record(s) to the *Assigned Samples to Labs* window at the bottom of the screen.
4. Repeat this process for all unassigned Sample/Analyses record(s) that need to be assigned to Laboratories.

5. Within the *Select Samples to Assign* and the *Assigned Samples to Labs* windows, all columns can be sorted (See the Sorts and Secondary Sorts Help text). Click and drag any column heading edge to resize that column, if necessary.
6. To unassign a Sample/Analyses record(s) from a Laboratory, select the record(s) from the *Assigned Samples to Labs* window, then click the **[Unassign]** button.
7. Click the **[Next>]** button to proceed to Step 7.

Preliminary Results

This function provides a simple edit screen with a Preliminary Results checkbox column.

1. Click on the **[Preliminary Results]** button and the *Preliminary Results* screen will open.
2. Select "Yes" in the Preliminary Results column for each Sample/Analysis record(s) for which the user wants to receive preliminary results.
3. Click the **[Close]** button. PR will be printed on the Traffic Report next to the Turnaround Time.

STEP 7: Assign Carrier

Laboratory samples are grouped for shipment and assigned to a carrier in this step.

Step Seven: Assign Carrier - EXAMPLE SITE

Carrier: [] Date Shipped: [] AirBill Number: []

Select Samples to Assign

Sample Number	Matrix	Analysis	Lab	Program Code	Status
---------------	--------	----------	-----	--------------	--------

Unassign Assign

Assigned Samples to Carrier

Sample Number	Matrix	Analysis	Lab	Carrier	Ship Date
IC0077	Industrial Effluent W...	CLP TCL Semivolat...	CLAYTN	DHL	2/20/200...
CO077	Industrial Effluent W...	CLP TCL Volatiles	CLAYTN	DHL	2/20/200...
LOCATION ONE	Industrial Effluent W...	Corrosivity (pH)	CLAYTN	DHL	2/20/200...
MC0077	Industrial Effluent W...	Aluminum	CLAYTN	DHL	2/20/200...
MC0077	Industrial Effluent W...	Barium	CLAYTN	DHL	2/20/200...
MC0077	Industrial Effluent W...	Calcium	CLAYTN	DHL	2/20/200...
MC0077	Industrial Effluent W...	Chromium	CLAYTN	DHL	2/20/200...
MC0077	Industrial Effluent W...	CLP TCL Total Metal	CLAYTN	DHL	2/20/200...

All fields in red are required fields

Close < Back Finish Customize IR QuickView

1. Click on the down-arrow in the Carrier drop-down box to select a shipping carrier.
2. To add a carrier, click on the Add Carrier [...] button or use the Shipping Carrier Reference Table. Access to the Reference Table is available from the Main Menu Bar under the Customize option but only when all Sites are closed.
3. Enter the Date Shipped as MM/DD/YYYY, then enter an Airbill Number.
4. Select the sample(s) from the *Select Samples to Assign* window and click the **[Assign]** button to assign shipping information to the entry(ies).

NOTE: Each Airbill only accepts samples for one Laboratory. Separate Airbills must be created for multiple Laboratories.

5. To delete or change an assigned entry, select the entry from the *Assigned Samples to Carrier* window and click the **[Unassign]** button.
6. The user can generate a TR/COC report now by clicking on the **[Finish]** button. The application will automatically assign samples to TR/COC reports using the next available TR/COC number.

- To customize the TR/COC report, click on the **[Customize TR]** button to go to Customize TR screen. The user can customize the TR/COC numbers or specify samples to be reflected on a certain TR/COC report.

Customize TR

The Customize TR screen was designed to assist the user that places samples assigned to one airbill into multiple coolers, and each cooler requires its own TR/COC report.

NOTE: To skip Customize TR, click the **[<Back]** button to return to Step 7, and click the **[Finish]** button.

Customize TR - EXAMPLE SITE

Traffic Report Number: 3 - 561245489 - 061302 - 0001

Select Shipment			Select Sample			
Carrier	Ship Date	Air Bill	Sample Number	Analysis	Lab Code	Matrix

Unassign Assign

Samples Assigned to TR					
Sample Number	Analysis	Lab Code	Traffic Report	Station	Location
MC0077	Aluminum	CLAYTN	3-103823254-022001-0003	STATION ONE	LOCATION ON
MC0077	Barium	CLAYTN	3-103823254-022001-0003	STATION ONE	LOCATION ON
MC0077	Calcium	CLAYTN	3-103823254-022001-0003	STATION ONE	LOCATION ON
MC0077	Chromium	CLAYTN	3-103823254-022001-0003	STATION ONE	LOCATION ON
MC0077	CLP TAL Total Metal...	CLAYTN	3-103823254-022001-0003	STATION ONE	LOCATION ON
C0077	CLP TCL Semivolatili...	CLAYTN	3-103823254-022001-0001	STATION ONE	LOCATION ON
C0077	CLP TCL Volatiles	CLAYTN	3-103823254-022001-0001	STATION ONE	LOCATION ON

All fields in red are required fields

Close < Back Finish QuickView

- Confirm the calculated TR/COC number generated by the application and make changes to the number as necessary. Only the last portion of the TR/COC number can be edited.
- Select the desired Airbill number by clicking on it within the *Select Shipment* window in the upper left corner of the screen.
- Select the desired samples contained within the Airbill from the *Select Sample* window in the upper right corner of the screen. The user may select multiple samples by using either the **[Ctrl]** or **[Shift]** keys (See the Multiple Selections Help text).
- Click on the **[Assign]** button to assign the selected samples to the TR/COC report.

5. To unassign or change an assigned sample, select the item from the *Samples Assigned to TR* window, then click on the **[Unassign]** button.
6. Click the **[Finish]** button after the TR/COC report has been properly customized.

NOTE: TR/COC reports are program-specific so each report contains analyses for a particular program type (Generic, Organic, or Inorganic). The user can change the TR/COC Program Type only in the Analysis Reference Table. If the user decides to make changes to the Analysis Program Type, it is suggested that they unassign the affected analyses from the TR/COC report and reassign them after the changes are completed.

Traffic Report Number


The unique TR/COC number is generated by the application (i.e., 05-122457489-11181999-0026). The first two digits are the Region number. The next set of nine digits is a randomly generated number assigned to each computer running FORMS II Lite. The next set of eight digits is the date that the TR/COC was generated. Finally, the last set of four digits is a sequential number. The user can edit only the last four digits of the TR/COC number.

Print/View a Specific TR

This is the final screen of the FORMS II Lite “Wizard”. It allows the user to preview or print TR/COC reports, Receipt for Samples, Sampler Comments, and the Sample Weight Log, all containing information previously entered in the application.

Lab	Traffic Report Number	Program Code	Complete	Archived
CLAYTN	3-103823254-022001-0001	Organics	No	No
CLAYTN	3-103823254-022001-0002	Generic	No	No
CLAYTN	3-103823254-022001-0003	Inorganics	No	No

Double-click on TR if shipment in Case is complete

1. Click the **[Finish]** button at the bottom of either Step 7 or Customize TR to continue to the *Print/View a Specific TR* screen.
2. Select a TR/COC number from the *Select TR* window at the top of the *Print/View a Specific TR* screen.
3. Select the appropriate report to preview from the *Select a View* window, then click the **[View]** button at the bottom of the *Print/View a Specific TR* screen.
4. Select the desired form or report to print from the *Print Options* window, then click the **[Print]** button at the bottom of the *Print/View a Specific TR* screen.
5. If the user is previewing a form or report, they can print from within the preview screen by clicking on the printer icon .

The following fields appear on a TR/COC report:

- Case No.
- DAS No.
- Region
- Project Code
- Account Code
- CERCLIS ID
- Spill ID
- Site Name/State
- Project Leader
- Action
- Sampling Co.
- Date Shipped
- Carrier Name
- Airbill
- Sample No.
- Matrix/Sampler
- Conc/Type
- Analysis/Turnaround
- Tag No./Preservative/Bottles
- Station Location
- Sample Collect Date/Time
- Corresponding Sample No.
- QC Type
- Shipment for Case Complete?
- Samples to be used for Laboratory QC

Archive

The Archive feature allows the user to take a “snap shot in time” of a specific TR/COC report. Since the Archived TR/COC is just a static snapshot, the user cannot make changes to the copy of the Archived TR/COC. The user can make changes to the actual TR/COC, then create another Archive. This creates two separate archive records for one TR/COC report, each with a different archive time.

1. Select the desired TR/COC report to archive, then click the **[Archive TR]** button. The user will receive a confirmation message when the TR/COC report is successfully archived.
2. To view all archived TR/COC reports, click the Show Archived TRs checkbox, the *Select Archived TR* window will appear at the top of the screen. The archived TR/COC's can be viewed or printed with the same functionality as the *Print/View a Specific TR* screen (See the *Print/View a Specific TR* Help text).

Shipment Complete

The user can indicate that a shipment is complete while in the *Print/View a Specific TR* screen.

1. Double-click on the desired TR/COC in the *Select TR* window to indicate a completed shipment.
2. The Complete field for that TR/COC will toggle between “Yes” and “No”. The shipment complete indication will appear on the printed TR/COC report.

QuickEdit

From the *Print/View a Specific TR* screen the user can access the QuickEdit function. This feature allows the user to edit almost all data element fields, except red required fields, without having to go back to previous steps.

1. From the *Print/View a Specific TR* screen, click the **[QuickEdit]** button in the bottom right-hand corner of the screen. As in the QuickView feature, the user can filter and arrange columns, as well as print the QuickEdit view as a report.

NOTE: Red required fields cannot be edited from within QuickEdit.

2. When making changes in QuickEdit, they become permanent to the database once the user clicks within another data element field or record.
3. Click the **[Close]** button to return to the *Print/View a Specific TR* screen once all changes are made.

Weights

The **[Weights]** button brings up the Sample Weights Log that allows the user to view or edit the tared and final weights per bottle to support Method 5035.

1. Click on the **[Weights]** button in the lower right corner of the *Print/View a Specific TR* screen.
2. Locate the appropriate sample(s) and view or edit the tared or final weight for that sample.
3. This log can be filtered in the same way that the QuickView is filtered.
4. The user can print the Sample Weights Log for reporting purposes.

Export TR

This feature allows the user to select one or more TR/COC report and generate a universal XML (Extensible Markup Language) file.

1. Click the **[Export TR]** button to open the *Export TR* window.
2. Click to highlight one or more desired TR/COC numbers or click on the **[Select All]** button. The user can click again to deselect a TR/COC number or click on the **[Deselect All]** button.
3. To export a Region TR/COC, including Site and field QC information, click the checkbox below the selection window.
4. Click the **[Export TR]** button to open the *Save Export File As* window. Enter a file name and determine the location to save the (.xml) file, click on the **[Save]** button.
5. The user will receive a confirmation message after the file is saved successfully. Click on the **[OK]** button to return to the *Export TR* window.
6. Once all desired TR/COC numbers are exported, click on the **[Close]** button to return to the *Print/View a Specific TR* screen.

Section 3

Customizing FORMS II Lite

FORMS II Lite has preference settings that control the general appearance of the user interface including naming conventions of certain fields, as well as options related to specific functions such as Turnaround Time, One-Step Printing, and QuickView. Information about specific preference options is provided in this section.

Field Labels

The user can customize field labels and certain button labels to meet the information gathering requirements set by the user's Region.

Default Label Name	Customized Label	Disabled
Select a Site Name		<input type="checkbox"/>
Date/Time:		<input type="checkbox"/>
Site Name:		<input type="checkbox"/>
EPA Region Number:		<input type="checkbox"/>
Regional Project Code:		<input type="checkbox"/>
Account Code:		<input type="checkbox"/>
Case Number:		<input type="checkbox"/>
DAS Number:		<input type="checkbox"/>
CERCLIS:		<input type="checkbox"/>
State:		<input type="checkbox"/>
OP Unit:		<input type="checkbox"/>

System required fields cannot be disabled

Close

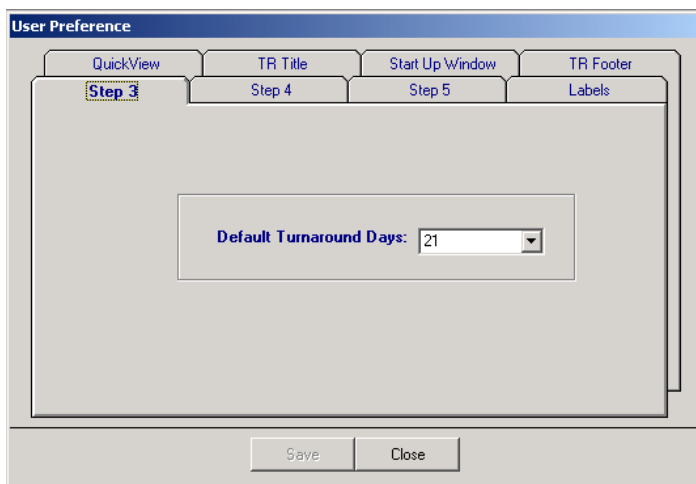
1. From the Main Menu Bar, select Customize, then select Field Labels. Fields are grouped in tabbed sections according to the Step number of each screen.
2. Enter a customized label name next to the field to be renamed.
3. Disable a field by clicking on the checkbox next to the field. A field that is disabled will appear grayed out and is unavailable to the user. Required fields cannot be disabled.
4. Enable a field by clicking on the checkbox next to the field once again.

- Click the **[Close]** button to save the changes and return to the main opening screen.

NOTE: It is recommended that users NOT disable any fields that appear on a Traffic Report/Chain of Custody (TR/COC) report.

Preferences

The user can modify and set preferred user defaults for eight areas of the application.



From the Main Menu Bar, select Customize, then select Preferences.

Preference tabs:

- Step 3 - allows the user to set the system default for the number of Turnaround Days.
- Step 4 - allows the user to enable or disable the End Sample Date/Time function and to specify the use of the Station or Station Location.
- Step 5 - allows the user to set the system default to show and use the Default Number of Bottles, the **[Assign All]** button, and the One-Step Printing settings.
 - When the Use Default Number of Bottles checkbox is selected, the system defaults to the number of bottles chosen for each analysis. The user can edit the Default Bottle for

each analysis through the Analysis Reference Table under the Customize option on the Main Menu Bar.

- When the Show Assign All Button checkbox is checked, the **[Assign All]** button is enabled. Use this button to automatically assign all of the analyses, per their defaults, in the *Select Analysis* window to the *Assigned Analysis with Sample Number* window.
- When the Show One-Step Printing Button box is selected, the **[One-Step Printing]** button is enabled (See the One-Step Printing Help text).
- Labels - allows the user to choose the sort order of certain data fields.
- QuickView - allows the user to determine which data fields will appear on the screen. The screen functionality works the same as selecting sampling team members in Step 2, and selecting analyses in Step 3.
- TR Title - allows the user to rename or edit the title of the TR/COC report.
- Start Up Window - allows the user to enable or disable the opening Dialog box.
- TR Footer - allows the user to replace or edit the SMO address on the TR/COC report.

Using Reference Tables

Reference Tables are available under the Customize option on the Main Menu Bar. The Reference Tables contain the information found in the look-up lists and drop-down boxes throughout the application. The user is allowed to make permanent additions, deletions, and edits to all listed tables. Although the Reference Tables are similar to one another, there may be slight differences in content or required number of fields among them.

The screenshot shows the 'Reference Tables' application window. The title bar reads 'Reference Tables'. The window contains several overlapping panels. The 'Analysis' panel is the most prominent, showing a list of reference tables on the left and a form for editing the selected table on the right. The list on the left includes: CLP TAL Total Metals, CLP TAL Total Metals and Cyanide, CLP TCL Pesticide/PCBs, CLP TCL Semivolatiles, CLP TCL Semivolatiles and Pesticides, CLP TCL Volatiles, Cobalt, Coliforms, Color, Copper, Conductivity (pH), Conductivity (steel), Cyanide, Dioxins and Furans, Ethane, Ferrous Iron, and Formaldehyde. The 'CLP TAL Total Metals' table is selected. The form on the right has the following fields: 'Analysis' (text field with value 'CLP TAL Total Metals'), 'Abbreviation' (text field with value 'TM'), 'Program' (dropdown menu with value 'CLP'), 'Program Type' (dropdown menu with value 'Inorganics'), 'Default Bottle' (text field with value '1'), 'Preservative' (dropdown menu), and 'Comments' (text area with value 'Inorganic Analysis'). At the bottom left, a red text label reads 'All red fields are required'. At the bottom right, there are five buttons: 'Add New', 'Save', 'Cancel', 'Delete', and 'Close'.

1. Select Reference Tables under the Customize option on the Main Menu Bar.
2. Select a listed reference table such as Team Member.
3. Add a new entry, by clicking on the **[Add New]** button. Enter all required data and any additional information as necessary. Save it by clicking on the **[Save]** button.
5. Search for a record by scrolling through the list on the left. The user can type the first letter within the list to jump to that section.
6. The user can make edits as needed. After changes are made, click the **[Save]** button to ensure edits are saved to the Reference Table.

7. To delete a record, find the record desired and click the **[Delete]** button. A confirmation box will appear, click the **[Yes]** button to delete it.
8. Click the **[Cancel]** button when it is active to cancel the last operation performed.
9. Click the **[Close]** button to exit the Reference Table.

Deleting Labels

The user is able to delete unnecessary label templates.

1. From the Main Menu Bar, select Tools, then select Reports, and then the Labels option. Select Delete Label Template to permanently delete specified label templates.
2. Click to highlight the desired label template from within the *Delete Labels Designed* window.
3. Click the **[Delete]** button.
4. To delete the template, click the **[Yes]** button in the dialog box. Otherwise, click the **[No]** button.
5. Click the **[Done]** button to exit the screen.

Section 4

Site Management

FORMS II Lite provides many options for handling Sites within FORMS II Lite or outside of FORMS II Lite using other applications. It allows the user to easily duplicate the basic information of a Site for use on the same PC or duplicate the entire Site for use on a remote PC. Different file format exports using .txt, .dbf, and XML as well as custom filtering and delimiter options offer the flexibility of using the data anywhere. Once the user is comfortable that the data is safe, FORMS II Lite allows the user to delete Sites and keep the database small, allowing increased speed.

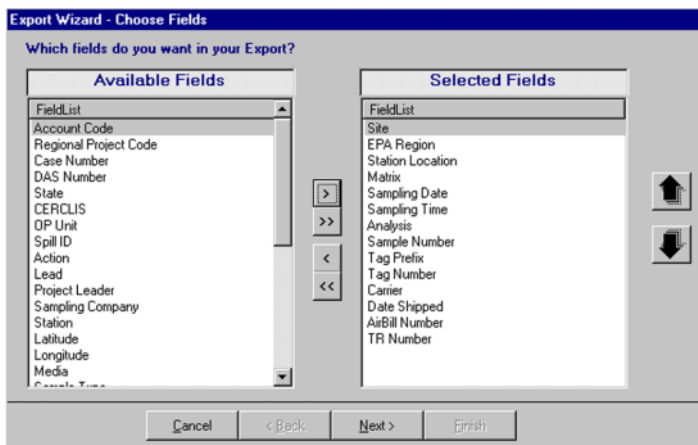
Copying/Deleting a Site

Use the Copy Site function if there are multiple Sites with similar data information or a Site is visited regularly. Duplicating Site data is a convenient tool that reduces keystrokes and data entry.

1. From the Main Menu Bar, select Tools and select Copy Site to duplicate a specific sampling Site.
2. Click to highlight the Site to be copied within the *Copy Specific Site* window.
3. Click the **[Copy]** button.
4. In the *New Site Name* window and enter a Site Name. Click **[OK]** to continue, or **[Cancel]** to return to the *Copy Specific Site* window.
5. Click the **[Done]** button to exit the screen.
6. The user is able to delete sampling Sites that are no longer needed. From the Main Menu Bar, select Tools and select Delete Site to permanently delete a specific sampling Site.
7. Click to highlight the desired Site within the *Delete Specific Site Information* window.
8. Click the **[Delete]** button. A prompt message will appear.
9. To delete the Site, click the **[Yes]** button in the dialog box. Otherwise, click the **[No]** button.
10. Click the **[Done]** button to exit the screen.

Exporting Site Data as a text file

1. From the Main Menu Bar select File, select the Custom Export option, then select Export to Text to open the Export Wizard.
2. Select a Site by clicking to highlight the Site Name on the right side of the window. Next, select an Export Template on the left side of the window. The user can click the **[Use New Template]** button to create a new template or click the **[OK]** button to continue to the *Choose Fields* window of the Export Wizard.
3. The functionality of the *Choose Fields* window is the same as that of Step 2 and Step 3 within the application. Select a desired field from the *Available Fields* window on the left-hand side by clicking to highlight it. Assign the field by either clicking on the right arrow **[>]** or by double-clicking on the field. This moves and adds the field to the *Selected Fields* window on the right-hand side.



- Clicking on the double right arrow **[>>]** moves and adds ALL the fields to the *Selected Fields* window on the right-hand side.
- Clicking on the left arrow **[<]** removes a selected field from the *Selected Fields* window on the right-hand side back to the *Available Fields* window on the left-hand side.
- Clicking on the double left arrow **[<<]** removes ALL fields from the *Selected Fields* window on the right-hand side back to the *Available Fields*

- window on the left-hand side.
- The user can sort the order of fields by highlighting a field in the *Selected Fields* window. Click on either the black Up or Down arrows along the right side to move the selected field up or down among all fields.
4. Click the **[Next>]** button to continue to the *Filter Field Values* window. Specify filter criteria for exported data, but only certain fields that contain data can be filtered. The user is NOT required to filter data fields, but has the option to do so.
 5. Click on the **[Next>]** button to continue to the *Delimiter Preference* window. Choose a delimiter to separate the fields in the text file. Do not choose a character or symbol that already exists within the file as a delimiter. Select the checkbox next to Include Field Names in First Row to include a header row in the file.
 6. Click the **[Finish]** button to export the text file. A message box will display asking the user if they want to save the Export Template.
 7. When selecting the **[Yes]** button, the user is required to name the Export Template. Enter a name for the Export Template and click the **[Finish]** button. The user is asked to save the Export File. If the user selected the **[No]** button to saving the Export Template, they are asked to save the Export File.
 8. At the *Save Exported File As* window, name the Export File and determine the path and location where the file is to be saved. Click on the **[Save]** button. The user must click the **[OK]** button at the *File Saved Confirmation* window.

Exporting Site Data as a dBase file

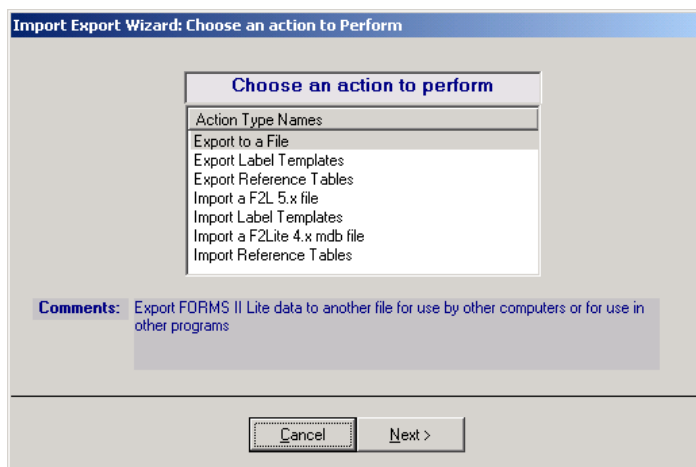
1. From the Main Menu Bar select File, select the Custom Export option, and then select Export to dBase to open the Export Wizard.
2. Select a Site by clicking to highlight the Site Name on the right side of the window. Next, select an Export Template on the left side of the window. The user can click the **[Use New Template]** button to create a new template or click on the **[OK]** button to continue to the *Choose Fields* window of the Export Wizard.
3. The functionality of the *Choose Fields* window is the same as that of Step 2 and Step 3 within the application. Select a field from the *Available Fields* window on the left-hand side by clicking to highlight it. Assign the field by either clicking on the right arrow **[>]** or by double-clicking on the field. This moves and adds the field to the *Selected Fields* window on the right-hand side.
 - Clicking on the double right arrow **[>>]** moves and adds ALL the fields to the *Selected Fields* window on the right-hand side.
 - Clicking on the left arrow **[<]** removes a selected field from the *Selected Fields* window on the right-hand side back to the *Available Fields* window on the left-hand side.
 - Clicking on the double left arrow **[<<]** removes ALL fields from the *Selected Fields* window on the right-hand side back to the *Available Fields* window on the left-hand side.
 - The user can sort the order of fields by highlighting a field in the *Selected Fields* window. Click on either the black Up or Down arrows along the right side to move the selected field up or down among all fields.
4. Click the **[Next]** button to continue to the *Filter Field Values* window. Specify filter criteria for exported data, but only certain fields that contain data can be filtered. The user is NOT required to filter data fields, but have the option to do so.
5. Click the **[Finish]** button to export the dBase file. A message box will display asking the user if they want to save the Export Template.
6. When selecting the **[Yes]** button, the user is required to name the Export Template. Enter a

name for the Export Template and click the **[Finish]** button. The user is then required to save the Export File. If the user selected the **[No]** button to saving the Export Template, they are asked to save the Export File.

7. At the *Save Exported File As* window, name the Export File and determine the path and location where the file is to be saved. Click on the **[Save]** button. The user must click the **[OK]** button at the *File Saved Confirmation* window.

Exchanging Site Data between PCs

The user can import and export their Sites, Reference Tables, and label templates to and from another computer.



1. From the Main Menu Bar select File option, then select Import/Export to open the Import/Export Wizard. The user must select an action to be performed.
2. To Export a Site: Select Export to a File, then click the **[Next]** button.
 - In the *Create a File of Type* window, select the export file type.
 - Select a Site Name and click the **[Finish]** button.
 - If the Site has archived TRs, these can be exported with the Site information by selecting the Export Archived TRs checkbox.

- Name the export file and click the **[Save]** button. The user will receive a confirmation message stating that the file was exported.
3. To Import a Version 5.x Site: Select Import a F2L 5.x file, then click on the **[Next]** button.
 - In the *Select Data to Import* window, enter the name of the file or click on the **[Browse]** button to select the (.F2L) file to be imported.
 - Select the checkbox to Import Measurements Data to import all associated measurements data. In Step 1 the Site name will appear with an updated Date/Time reference.
 - If the Site was exported with archived TRs, these TRs can be imported by selecting the Import Archived TR Data checkbox. These TRs are not marked as archived on the Print TR screen, but they can be viewed by selecting the Show Archived TRs checkbox.

NOTE: If Step 5 was not completed in the Import/Export F2L file, analyses in Step 3 must be reselected before previously entered Step 4 data will appear.

4. To Import a Version 4.x Site, its Reference Tables, or Templates: Select Import a F2Lite 4.x mdb file, then click on the **[Next]** button.
 - In the *Select Data to Import* window, enter the name of the file or click on the **[Browse]** button to select the (.mdb) file to be imported.
 - Select the checkboxes under *Select Data to Import from Selected File* to specify the import parameters and click on the **[Next>]** button.
 - Select the appropriate Import options that appear on the tabs for each import parameter and click the **[Finish]** button.

5. To Export a Label Template: Select Export Label Templates, then click the **[Next>]** button.
 - In the *Label Templates* window, select a label template and click the **[Finish]** button.
 - Name the export file and click the **[Save]** button.
6. To Import a Label Template: Select Import Label Templates, then click the **[Next>]** button.
 - In the *Select Data to Import* window, enter the name of the file or click on the **[Browse]** button to select the (.F2T) file to be imported and then click the **[Finish]** button.
7. To Export a Reference Table: Select Export Reference Tables, and then click the **[Next>]** button.
 - In the *Reference Tables* window, select a reference table and click the **[Finish]** button.
 - In the *Reference Tables* window, select a reference table and click the **[Finish]** button.
 - Name the export file and click the **[Save]** button.
8. To Import a Reference Table: Select Import Reference Tables, and then click the **[Next>]** button.
 - In the *Import Reference Table* window, enter the name of the file or click the **[Browse]** button to select the (.F2R) file to be imported.
 - Select the “Append Information” option to add any new records from the import table to the existing reference table.
 - Select the “Update Existing Information” option to add any new records and make changes that appear in the import table, to the data in the original reference table.
 - Select the “Replace Information” option to replace the entire reference table with the imported table.
 - Click the **[Finish]** button to complete the import.

Glossary

Airbill	Official form used by commercial shipping carriers to document transport of materials.
Analytical Operations/ Data Quality Center (AOC)	The EPA Office that directs the Contract Laboratory Program (CLP).
Case	A finite, usually predetermined number of samples collected over a given time period from a particular site. A Case consists of one or more Sample Delivery Groups (SDGs).
Case Number	Number assigned to a set of CLP samples by the Sample Management Office (SMO) for tracking purposes.
CERCLIS ID	Identification number assigned to a site by EPA, starting with the state abbreviation where the site is located (e.g., NCD044447639).
Cleanup Action	Actions taken to deal with the threat or actual release of a hazardous substance that could affect humans, wildlife, and the natural environment. The term “cleanup” is sometimes used interchangeably with the terms remedial action, removal action, response action, or corrective action.

CLP Sample Number	A unique number used to identify and track a sample.
Composite Sample	A series of water samples taken over a given period and weighted by flow rate.
Concentration	The contamination level of environmental samples defined as low, medium, or high.
Contract Laboratory Program (CLP)	A national program of commercial Laboratories under contract to support the EPA's nationwide efforts to clean up designated hazardous waste Sites by providing a range of chemical analytical services to produce environmental data of known quality. This program is directed by the Analytical Operations/Data Quality Center (AOC).
Grab Sample	A single sample collected at a particular time and place that represent the composition of the water, air, or soil only at that time and place.
Office of Solid Waste and Emergency Response (OSWER)	The EPA office that provides policy, guidance, and direction for EPA's solid waste and emergency response programs, including Superfund.
Performance Evaluation Sample (PE sample)	A sample of known composition provided by EPA for contractor analysis. Used by EPA to evaluate contractor performance.

Potentially Responsible Party (PRP)	The individual or party who may be responsible for the contamination of an area.
Preliminary Results (PR)	A term used within the Contract Laboratory Program (CLP). It describes a turnaround option that provides data users with initial results of sample analyses that have not yet been validated and that are received within 48 to 72 hours, depending on the analysis.
Quality Assurance (QA)	An integrated system of management activities involving planning, implementation, assessment, reporting, and quality improvement to ensure that a process, item, or service is of the type and quality needed and expected by the customer.
Quality Control (QC)	The overall system of technical activities that measures the attributes and performance of a process, item, or service against defined standards to verify that they meet the stated requirements established by the customer; operational techniques and activities that are used to fulfill requirements for quality.
Quality Control (QC) Samples	Samples used to estimate the precision and accuracy of analytical results in the field and in the laboratory.

Sample Container

The individual bottle that contains the sample or an aliquot of the sample. The type of sample container varies for different sample fractions and concentrations.

Sample Delivery Group (SDG)

A unit within a Case that is used to identify a group of samples for delivery. An organic SDG is a group of 20 or fewer field samples within a Case received over a period of up to 7 calendar days (excluding Sundays and Government holidays). A low concentration organic SDG is a group of 20 or fewer field samples within a Case received over a period of up to 7 calendar days. An inorganic SDG is a group of 20 or fewer field samples within a Case received over a period of either 3 or 7 calendar days depending on the requested turnaround time of the sample data package.

Sample Management Office

A contractor-operated facility operated by the Sample Management Office (SMO), contract, awarded and administered by EPA.

Sampling Plan

Explains how samples are to be collected and analyzed for a particular sampling event.

Site Spill Identifier (SSID)

The unique identification number assigned by EPA to a site.

Statement of Work (SOW)	A document which specifies how Laboratories analyze samples under a particular CLP analytical program.
Station Location	The specific location where samples are collected at a site.
Superfund	The program operated under the legislative authority of CERCLA and SARA that funds and carries out EPA removal and remedial activities at hazardous waste Sites. These activities include establishing the National Priorities List (NPL), investigating sites for inclusion on the list, determining their priority, and conducting and/or supervising cleanup and other remedial actions.



Standard Data Elements - Latitude/Longitude

This standard offers a common and consistent way to represent latitude and longitude information.

Latitude Measure The measure of angular distance on a meridian north or south of the equator.

Longitude Measure The measure of angular distance on a meridian east or west of the prime meridian.

Source Map Scale Number The number that represents the proportional distance on the ground for one unit of measure on the map or photo.

Horizontal Accuracy Measure The measure of accuracy (in meters) of the latitude and longitude coordinates.

Horizontal Collection Method Text The text that describes the method used to determine the latitude and longitude coordinates for a point on the earth.

Horizontal Collection Method Code The code that represents the method used to determine the latitude and longitude coordinates for a point on the earth.

Reference Point Text The text that identifies the place for which geographic coordinates were established.

Reference Point Code

The code that represents the place for which geographic coordinates were established.

Horizontal Reference Datum Name

The name that describes the reference datum used in determining latitude and longitude coordinates.

Horizontal Reference Datum Code

The code that represents the reference datum used in determining latitude and longitude coordinates.

Acronyms

AOC	Analytical Operations / Data Quality Center
CERCLA	Comprehensive Environmental Response, Compensation and Liability Act
CERCLIS	CERCLA Information System
CLP	Contract Laboratory Program
COC	Chain-of-Custody
DO	Delivery Order
EPA	Environmental Protection Agency
LCS	Laboratory Control Sample
NPL	National Priorities List
OP	Operable Unit
PE	Performance Evaluation
PR	Preliminary Results
PRP	Potentially Responsible Party
QC	Quality Control
TR	Traffic Report

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