Renewing a Permit

To renew a permit, you need to select the ‘Permit’ module (#1) and then the ‘Permit Management’ option (#2):
Enter a Facility Name or Facility ID (#3) and then click ‘Search’ (#4):
Select the permit you want to amend (the permit listed as ‘Issued’ is the latest version of the permit) by clicking on the ‘link’ button (#5):
To renew a permit, select the ‘Renew’ option (#6). The permit amendment process is the same as the permit renewal process. The only difference is the reason to change status of the permit (see page 5).
Select the reason to change the permit status (#7) (in this case select Renew) and enter any comments (#8) as required, then press ‘Submit’ (#9):
Enter the permit effective and expiration dates (#10). At this point, you can click the ‘Save Permit’ button (#11). If there are no changes to permit limits, select ‘Monitoring Requirements’ (#12) to create SMR requirements.
Under the ‘SMR Requirements’ tab (#13), select the sample location (#14):
Make sure ‘Substance’ is selected from the pulldown menu under Sample Collection Method Based On (#15), then click on ‘Generate SMR Requirements’ (#16)
Then click on ‘link’ (#17) under the Monitoring Requirement List. Note that you may need to repeat this step if SMR reporting frequencies vary. In the example below, SMRs are required only on a semiannual basis:
Select the first day of the SMR period (#18) and SMR type (#19), the click ‘Save’ (#20). In this case I entered 1/1/2015 for the semiannual period of 1/1/2015 – 6/30/2015. iPacs is expecting the first day of a monitoring period, if any other day is entered, the permit will not finalize. Once the data is saved, you can click on ‘Back’ (#21):
To generate control authority sampling requirements click on the ‘Sampling Requirements’ tab (#22):
Select the sampling location (#23):
Click on ‘Generate Sampling Requirements’ (#24):
Then click on ‘Edit’ (#25) to define when the sampling requirements are due:
Enter the start and end dates (#26) for the period for which you want to create sampling tasks (usually corresponds to the permit effective and expiration dates). On ‘Sampling Start Date’ (#27) enter the date when the first sampling event is due. In this case the first sampling event is due at the end of the semiannual period (6/30/2015). Click ‘Save’ (#28), and then ‘Manually Generate Tasks’ (#29):
At this point you can see the sampling tasks created for this facility. You can click ‘Back’ on your browser twice to go to the permit module. To finalize the permit click on the ‘Finalize’ option (#30):
If everything shown is green you can click on the ‘Finalize’ button (#31). If the SMR first required date check says ‘Failed’ you need to go back to the Monitoring requirements and select the first day of the SMR period (see page 10):
You will be taken to the screen below. To issue the permit click on ‘Approve Permit’ (#32):
Enter a reason for changing status (#33) (issue permit is the only option at this point) and enter any comments (#34), finally click ‘Submit’ (#35) to complete the process:
Generating Inspections

There are 2 ways to generate inspections in iPacs: 1) through a work requirement for recurring inspections and 2) through the inspection module for ad hoc inspections (go to page #14).

To generate recurring inspections go to Work Order then select New Work Requirement:

![Image of Work Orders Application Home with New Work Requirement highlighted]
Enter the facility name, then select “Inspection” under Task Type then Click on “Continue”: 
Select the facility from the list shown then click “Continue”
Select an inspection Task Template from the list shown, then click “Continue” on the bottom of the page (not shown):
Enter a date range for the work requirement, when the first inspection is required, and the frequency, then click “Continue”: 
Click “Finish”: 
A Work Requirement has been created, click under “Detail”:
The Work Requirement information will appear, then click “Manually Generate Tasks”. You can make changes to the Work Requirement at this point, if needed (just click “Save” after you make any changes).
A list of Inspection Tasks will appear and you are done. To enter inspection results, click on the “Edit” button for a particular inspection task (note that you can also access the list of inspection tasks through the Work Order -> Task Management module):
You can update your task status on this screen and enter a date when the task was scheduled or completed. Click on the "Inspection" button at the bottom of the screen to enter inspection results:
Then enter the inspection summary under the “Comments” field. Note that this is the information from the inspection that will migrate to the monthly/quarterly reports:
You can associate inspections from the Inspectors submodule and the [Associate New Users] tab (click search and select a name from the list):
Finally, you can attach a copy of your inspection report (in PDF) under the Attachments submodule. It is recommended to name the file based on the following convention: [Facility Number]_[Document Type]_[Date], so an inspection record for the facility below would be named:

1089_QuarterlyInspection_073114
To create an ad hoc inspection go to the Inspection module and then select New Inspection:
Enter a Facility Name then click “Continue”:
Select a Facility from the list and click “Continue”:
Enter a Task Template Name (if you know it), otherwise click “Search” for a list of available inspection task templates:
Select an inspection type and an available task template then click “Continue”: 
Select a date from the calendar (or multiple dates) and click “Continue” (note that you can only schedule inspection within a 6 month period using this module, if you scroll the calendar forward, you will lose the inspection dates you had selected in the previous months):
Assign the inspection to a user then click “Continue”: 
The task summary will show and then click “Finish”:  

![Screenshot of task summary and finish button]
To see the task, click under the “Edit” button:
You can now change status and enter inspection information:
Creating Enforcement

To create enforcement you need to first select the ‘Compliance’ (#1) module. Then you will need to create a violation record. For this, you will need to click on ‘New Violation’ (#2):
Enter the facility name (#3) and select a facility from the options provided by iPacs. Here, you need to make sure you select one of the options; otherwise, iPacs will not be able to associate the violation to the facility. Once selected, click on Continue (#4):
Enter all the information for the required fields (indicated by an asterisk) [Violation Date], [Violation Category], [Data Source], [Comments]. Note that the information entered on the ‘Comments’ field is what is migrated to the report. Once the data has been entered, click on ‘Continue’ (#5):
If all the information entered is correct, click ‘Finish’ (#6). Click on ‘Previous’ if you need to make any changes. You can also add another violation to this facility by selecting the ‘Add Another Violation’ button:
iPacs will bring you to the previous screen automatically. At this point, you can associate any enforcement action as a result of the violation just created. Click ‘Related Enforcement’ (#6):
You can then click ‘Create New Enforcement’ (#7):
Enter all the information related to the enforcement you want to associate to the violation. The required fields are marked with an asterisk: [Determined Date], [Enforcement Type], [Status], [Response Due Date], [Comments]. Note that you cannot enter a date on [Respond Due Date]. iPacs will fill in the date after you click on ‘Get Response Due Date’ (#8). This date will default to 2 weeks after the ‘Determined Date’, if you need to change this date, you’ll need to enter a reason (see screen shot in the next page).
You can enter a different enforcement due date, but will need to enter a reason then click ‘OK’ (#9):
You will be required to enter a summary of the enforcement action under ‘Comments’ (#10). Note that this is the summary that will show up in the monthly/quarterly reports. Once the information is entered, click ‘Continue’ (#11):
If the information shown is correct, click ‘Finish’ (#12). You can click ‘Previous’ if you need to make a change, or ‘Add Another Enforcement’ if you need to add another enforcement to the violation.
iPacs will not show you a list of the enforcement actions associated with the violation created. At this point you are done with creating new enforcement and associating it to a violation. Note that you can also associate a violation to previously created enforcement by clicking on the ‘Associate New Enforcement’ tab (#12)
Just select any of the enforcement previously created from the list shown (#13), and then click ‘Associate’ (#14):
Now both enforcement actions associated with the violation created are shown:

<table>
<thead>
<tr>
<th>Case Name</th>
<th>Fine Amount</th>
<th>Enforcement Type</th>
<th>Status</th>
<th>Violation Date</th>
<th>Enforcement Date</th>
<th>Issue Date</th>
<th>Reissue Due Date</th>
<th>Resolved Date</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>001029</td>
<td></td>
<td>NOV</td>
<td>Pending</td>
<td>06/03/2014</td>
<td>06/03/2014</td>
<td>06/30/2014</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>001031</td>
<td></td>
<td>NOV</td>
<td>Issued</td>
<td>06/03/2014</td>
<td>06/03/2014</td>
<td>06/30/2014</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2 of 2

[Image of enforcement details]
You can use ‘Violation Management’ (#15) or ‘Enforcement Management’ (#16) from the Compliance module if you need to search for existing violations or enforcement:
iPacs will show active enforcement in the monthly/quarterly reports until it’s closed. To change the status you can open existing enforcement (search through ‘Enforcement Management’), then enter the facility name (#17) then ‘Search’ (#18):
Then click ‘Edit’ for the enforcement action you want to select (#19):
Enter the date the enforcement was resolved (#20), then change the status from issued to closed (#21), then click ‘Save’ (#22):
You can now upload a PDF copy of the enforcement documents sent to the facility (#23). Enter a file name, select a file and then click ‘Upload’:
The process described above consists of creating a violation and then creating/associating enforcement to that violation. iPacs allows you to create enforcement and then create/associate a violation. The process is basically the same, only that you select ‘New Enforcement’ (#24) from the Compliance module. Since the information entered is the same as described above, this process is not described in this guide.
Creating Sampling Tasks

There are 3 ways to create sampling tasks in iPacs:

1. Through the Permit Module – Monitoring Requirements
2. Through the Work Order Module – New Work Requirement
3. Through the Monitoring Module – New Sampling

In general, when a permit is created or renewed (or amended if the substances in the permit change), sampling tasks should be created as part of this process [#1]

Creating sampling tasks through the monitoring module [#3] is helpful when ad hoc sampling is required

Creating sampling tasks through the Work Order Module [#2] – New Work Requirement is useful when recurring tasks are needed.

A work requirement is an instruction where start/end dates, sampling parameters, and frequencies are defined. Tasks can then be generated from a work requirement.
1. Generating Sampling Tasks through the Permit Module – Monitoring Requirements

Access the permit module (#1) and then select permit management (#2):
Enter a facility name (#3) and then click on Search (#4):
Click on link (#5) for the permit you want to select:
Once in the permit module, make sure that all the pollutants and sampling frequencies (for both control authority and self-monitoring) are correct (under permit limits submodule [#6]):
Select a sampling location (#7). Each sampling location can have a different set of pollutant limits. Sampling locations are defined under the Facility ('Site') module.
Each substance must have an analysis group associated (#8). The analysis group is what tells iPacs what substances to analyze. Creating analysis groups is addressed in a separate instruction. Also note that these fields cannot be modified once a permit is finalized. A permit must be amended first before making any changes to this screen.
If the information in the previous screen is correct, then select the monitoring requirement submodule (#9), sampling location (#10), and then select sampling requirements (#11):
Select the sampling location (#12):
Click on “Generate Sampling Requirements” (13). Note that in this example the sampling requirements have been generated. This should be blank if done for the first time:
After clicking on Generate Sampling Requirements an entry should appear under Sampling Requirement List (#14). This is the work requirement. Click under Edit (#15):
Enter when the start date and end date of the sampling tasks (#16). Under ‘Sampling Start Date’ enter when the first sampling event is due (i.e. this should be the last day of the period corresponding to the sampling frequency, so 3/31 for the last day of the January-March quarter [in case of quarterly sampling], 6/30 for the last day of the 6-month period [in case of semi-annual sampling], etc.). Once these fields are filled out, click on ‘Manually Generate Tasks’ (#18). This will update the work requirement information with the correct start/end date.
Click Manually Generate Tasks a second time (#19):
A screen will appear now showing the sampling tasks created from the work requirement:
Click under Edit (#20) if you want to see what the sampling task looks like:
This is the task information. This is where the sampling task status is updated (i.e. changed from planned to scheduled to completed). Click on the Sampling button (#21) to access the sampling task information (i.e. samples) as well as to print the chain of custody form.
Click on the samples submodule (#22) to look at the samples associated with this sampling task and on COC Report (#23) to generate a copy of the chain of custody form.
This task can also be accessed through the Work Order module (#24) from anywhere in iPacs:
Then select Task Management (#25):
Enter the facility name (#25), then make sure the Assigned Resource field is blank (#26) [otherwise only tasks assigned to the user logged in will show up], then select the task type (#27) [sampling] in this case. Then click on ‘Search’ on the bottom of the screen.
This takes you to the same screen when the tasks were generated using the permit module:
2. Generating sampling tasks through the Work Order – Work Requirement module:

This is another option to create sampling tasks. The disadvantage of this method is that you will need to create a sampling task template as well. When sampling tasks are created from the permit module, iPacs automatically creates a task template based on the analysis groups defined in the permit limits submodule. Click on Work Order (#28) from anywhere in iPacs and then click on New Work Requirement (#29):
Enter a facility name and select the task type you are trying to create (sampling in this case, but this works as well for other task types, such as inspections). Click on ‘Continue’ (#32):
Select the facility (#33) and click continue (#34):
You now have to select a task template. There are a few task templates already created, so you can select any of these, but you will need to create a new one if you need to sample for something that is not covered in any of the templates (see separate instruction module on how to create sampling task templates). In this case I selected (#35) the ‘SAWPA Metals Sampling’ task template since I will assume I want to sample for metals. Then scroll all the way to the bottom of the page and click ‘Continue’.
This page should look familiar from the sampling requirements in the permit module. This is where the start/end date is entered, as well as when the first sample is due, as well as the sampling frequency (remember that in the permit module, the sampling frequency was defined in the permit limits). I’ll assume monthly sampling is required for metals for the upcoming year (starting July 1, 2014). Since this is a monthly sample, the first required date should be 7/31/2014. Then click continue at the bottom of the page:
You’ll get the following screen then click ‘Finish’ (#36):
This has created a work requirement. Now click under detail (#37):
And then click under manually generate tasks (#38):
This will generate the sampling tasks based on the work requirement details:
3. Generating sampling requirements through the ‘Monitoring’ module:

This is the final way to generate a sampling task. The difference between generating tasks in the monitoring module is that the sampling dates need to be selected from a calendar. The work requirement allows you to define a start/end date and a frequency and iPacs will generate tasks based on these parameters. To access the Monitoring module, select the ‘Monitoring’ tab from anywhere in iPacs (#39), then select ‘New Sampling’ (#40):
Enter the facility name where you want to sample (#41), then click ‘Continue’ (#42):
Select the Facility (#43) and then click ‘Continue’ (#44):

<table>
<thead>
<tr>
<th>Facility ID</th>
<th>Facility Name</th>
<th>Facility Legal Name</th>
<th>Facility Type</th>
<th>Facility Group</th>
<th>Monitoring Location Name</th>
<th>Monitoring Location Description</th>
<th>Physical Location</th>
<th>Monitoring Location Type</th>
<th>Case Manager</th>
<th>Permit No.</th>
</tr>
</thead>
<tbody>
<tr>
<td>#42</td>
<td>TEST_SANPA</td>
<td></td>
<td>CSO</td>
<td>SARPA</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

![Image of the user interface with an arrow pointing to the Facility selection area]
Enter a specific task template name (#44) if you know it or click under ‘Search’ (#45) to see all available sampling task templates:
Select a task template (#46) (billing in this case) then click ‘Continue’ (#47):
A calendar will appear. Select when you want the sampling to take place (I selected the last working day of the month for the next 6 months). Unfortunately, if you scroll the calendar forward you will lose any selected tasks in the first months. So creating tasks this way is limited to any number of tasks within the 6-month period shown in the calendar. If you want to create tasks for say the next year. You will need to create 6 months’ worth of tasks first, then start again to create the records for the following 6 months. This is definitely a disadvantage of creating sampling tasks this way. Once you select the dates, click Continue at the bottom of the screen:
Assign the sampling tasks to a specific user, then click ‘Continue’ on the bottom of the page:
Then click ‘Finish’ (#48):
This should generate the sampling tasks. You can then click on the notepad icon (#49) to go to the sampling task. You can also select a task (#49) and print a chain of custody form from this screen (#50):
Uploading Sampling Data

Uploading data from an Excel template can be accomplished through the Monitoring module:
The samples should be logged before uploading them. To do this, you can click on the “Sample Log” option:
Enter the Sample ID. This can be obtained from the Excel Report under SAMPLENAME (see Page 8) or from the Chain of Custody form provided that this is the Sample ID iPacs generated. If you used a different sample ID (i.e. not iPacs generated), you will need to create a sampling task in iPacs mirroring the same samples in the sampling event.
Once you enter the first sample ID, iPacs will display all samples associated with this monitoring event. You can then go ahead and check the boxes under Select (#1)
Once the samples have been logged, they will appear in the “Logged In Samples for this Session” table:
At this point, you should go back to the “Sample Result Upload” section (this section can also be accessed by selecting the Monitoring module from the top ribbon and selecting it from the list (see Page 1 for list):
This will take you to the following screen:
Before proceeding, you need to make sure the SAMPLENAME in the excel report has the sample ID. In the example shown below, you will need to remove any text information from the SAMPLENAME field and leave only a numeric value. For the Agencies using Babcock Laboratories, my recommendation is to request that the lab provides a report without any text values in this field. Also, you may want to save the excel file in a directory easily accessible.
Once your excel file is in the right format, check the COC Included but not Attached box (#3) select Browse (#4) and select the file to be uploaded:
Once the file is selected, select “Open”: 
And finally click on “Import”: 
You should get a message indicating that the import was successful. You can report any error messages you get to SAWPA to make sure they are resolved.
You can check to make sure the sample information was uploaded by clicking on the Quick Access tool (#5) and then entering a sample ID (#6) and then click “Go”: 
This will take you to the “view/edit sample” page where you can see if the results were uploaded. Select “Sample Analysis Results”
Any results uploaded will be shown in the table. If no results are displayed, you will need to click on “Edit” and enter the results manually:
Enter the results, units, and data qualifier (i.e. if the result is to be used for compliance and reporting, or reporting only), then click “Save”.
Once the data is saved you can either click on “Back to Results” (#7) to continue entering data for that particular sample, or click on “Samples” (#8) to see a list of substances associated with the monitoring event:
Waste Tracking Module

The purpose of the waste tracking module in iPacs is to keep track of all loads discharged to the Brine Line at the Collection Stations. iPacs allows creation of one record per discharge. Recognizing that creating a record for each load taken to a CS would be burdensome, the alternative is to summarize the CS activity for each generator/hauler combination on a monthly basis. A PDF copy of all manifests can be uploaded as one file into iPacs as well:

1. Then select New Discharge Wizard
2. Select Waste Tracking Module
On the next screen you can either enter the facility name or click search for a list of all indirect permits.

3. Either enter a facility name or leave blank to get a list of all indirect dischargers

4. Click the Search button
6. Select a facility

5. Then click on Next
The next screen is to identify a liquid waste hauler:

7. If known, enter the name, or leave blank.

8. Then click on Search
Then select a liquid waste hauler authorized to transport waste from the generator selected previously. Please note that if there is more than one liquid waste hauler taking waste from a generator, this process will have to be repeated. iPacs creates a record of a generator/hauler, so another record needs to be created for a different combination.
Then select the Collection Station where the waste was discharged.

11. Select Collection Station

12. Click on Finish
Enter basic information about the discharge.  
Under request date (#13), enter the last day of the month.  
Under request start date/request end date (#14) enter the first and last day of the month, respectively.  
If this is a load from a generator from a different service area, enter this in the comments field (#15).  
Then click save (#16).  
Then select Waste Description (#17)
After selecting Waste Description, the following screen shows up. Click ‘Add new’ (#18)
Enter Discharge Type (“Hauled”) [#19], then enter the total volume discharged at the Collection Station for the month under Actual Volume [#20]. Click ‘Save’ [#21]. Then click Attachments [#22] where a PDF copy of the manifests will be uploaded.
Enter the file name (#23) (i.e. [Generator Name]_[LWH]_[Month]_[Year]). So in this case you can enter IR_HTS_May_2014 for International Rectifier waste transported by HTS during the month of May 2014. Then select the file from wherever it is stored in your computer/server (#23), then click ‘Upload’ (#24).
You can search any records created under the main Waste Tracking module in the Discharge Management submodule (#25).
Enter any relevant information, or just click on Search (#26).
A list of records will appear. Click on Link (#27) to edit any information related to this record.
Entering SMR Data

First, you need to make sure SMR requirements have been created from the permit module. Go to the permit module (#1) from anywhere in iPacs and select permit management (#2):
Enter the Facility name (#4), then Search (#5):
Click on the ‘Link’ (#5) icon:
Then select Monitoring Requirements (#6):
Make sure the ‘SMR Requirements’ tab is selected (#7) and then select a sampling location (#8):
At this point any SMR requirements should show under the ‘Monitoring Requirement List’ (#9). If nothing shows up, then you will need to generate SMR requirements (this is usually shown as a green button on the bottom right of the screen. In this case nothing shows up because you cannot generate SMR requirements for an already approved permit. This needs to happen when the permit is under review.) Select ‘Substance’ from the pull down menu under ‘Sample Method Based on’ (#9a)
To solve this issue, you need to go to ‘Basic Information’ (#10) and amend the permit (#11):
Select an administrative reason for amending the permit (#12) (this way you make sure the permit number does not change, any other reason will change the permit number). Add comments under the ‘Comments for new permit’ section, if needed (#12). Click ‘Submit’ (#13). Once the permit is in the amended mode,
Ignore (and close) the pop-up window (#14) and then select ‘monitoring requirements’ (#15):
At this point you need to make sure that the information in the ‘Permit limit’ module (#16) is correct for self-monitoring requirements (refer to creating sampling tasks through the permit mode). Make sure you select the ‘SMR Requirements’ tab (#17) and select a sampling location (#18):
Click on the ‘Generate SMR Requirements’ button (#19). Select ‘Substance’ from the pull down menu under ‘Sample Method Based on’ (#19a)
At this point you’ll see that there information appearing under the ‘Monitoring Requirement List’. Click on the ‘Link’ icon (#20):
Make sure all the substances show up on the list. Then enter the first due date for the SMR report (#21). This date should be the FIRST day of the monitoring period. So in this example, the SMR period for the Facility is from January 1 through June 30, so you would enter 1/1/2014. Make sure you select an SMR Type (#22) [usually for compliance].
If you need to add more substances, click on the ‘Add New Substance’ button on the bottom of the page (#23). Then click on ‘Save’ (#24). After saving, then click on ‘Back’ (#25):
At this point you are done. Do NOT click on ‘Generate SMR Requirements’, if you do, you will need to repeat the whole process. Notice that the information in the Monitoring Requirement List now has a required date filled out. You can now go to the ‘Finalize’ submodule (#26) [if you amended the permit only to generate SMR requirements, otherwise the permit can still remain ‘Under Review’]:

![Monitoring Requirements List](image)

#26
Make sure all the text in the screen is color green then click on ‘Finalize’ (#27):
This will take you to the Basic Information screen, where you will click on ‘Approve’ (#28). Once the permit is approved, it will generate SMR tasks. As it stands right now, only SAWPA can approve permits, so you will need to contact SAWPA staff to approve the permit. We will work with enfoTech to make sure the agencies can approve a permit when the reason for amendment is administrative:
Select a reason for changing status (#30) (right now the only option is ‘Issue Permit’), then write any comments you’d like (#31), then click ‘Submit’ (#32):
To look at the SMR tasks created, select the SMR module (#32) from anywhere in iPacs and then click on ‘New Permit Self-Monitoring Report’ (#33):
Enter the Facility Name (#34) and then click ‘Continue’ (#35):
Select the Facility (#36) and then click ‘Finish’ (#37):
This will now generate SMR Tasks. To enter data, select the ‘Data Entry’ icon for the SMR period (#38):
At this point you can enter the date when the SMR was received (#39) and the sampling dates on the Calendar (#40). Once you select the sampling dates, you can enter the data by clicking on the ‘View/Edit SMR data’ button (#41). You can enter the data and save it. You can also run a compliance check based on the limits defined in the permit limits submodule. You can also attach a PDF copy of the SMR report under Attachments (#42):
Creating Analysis Groups

To create an analysis group, go to the ‘Configuration’ module (#1) from anywhere in iPacs, then click ‘Reference Table’ (#2):
Select ‘Substance’ (#3):
Then select ‘Analysis Group Search’ (#4):
Then click on ‘Search’ (#5) at the bottom of the page:
This should bring a list of all available analysis groups. To add a new one, click ‘add new’ (#6):
Enter a name (#7), a description (#8), sample method code (#9) and status (#10). The name should be descriptive so it can easily be selected from other modules. The description is important since this is what will show up in the chain of custody form, the sample method code should be based on the type of sample (i.e. composite or grab), and the status should be ‘Active’. Then click Save (#11). Note that analysis groups should be created consistent with the pollutants tested from the same bottle. So you shouldn’t mix pollutants that require different preservation or bottle type in the same group. Add the analysis method in the description, this way you make sure it shows up in the chain of custody:
Once you save it, find the Analysis Group you created from the list and click on ‘Edit’ [#12] (i.e. notepad icon):

![Image of the Analysis Group table with a marked row and a note]

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**Note:**
- #12 refers to the notepad icon used to click on the 'Edit' button in the Analysis Group view.

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**Details:**
- The Analysis Group table is visible with several columns including Analysis Group Code, Analysis Group Description, Sample Preservation Code, and Sample Method Code.
- A specific row is highlighted with the Analysis Group Code 'TEST SPECIAL_PARAMETER_GROUP'.
- The context suggests editing or making changes to this specific Analysis Group.
Click ‘Add More Substances to Group’ (#13) to add the substances you want to include in this analysis group:
Then add the substances by typing the name (#14). Make sure you select the substance from the pull down menu, otherwise it will not register it. Also set the status to Active. You can always inactivate a substance in an Analysis Group. After selecting it, click ‘Add to Group’ (#15):
Repeat the process until all the substances you want in the analysis group are selected:
Most substances should be available, but if they are not, you can select the substance submodule (#16) from the Configuration – Reference Table module and add a substance:
Generating Monthly/Quarterly/Water Quality Reports

Go to the Report Module (#1), then select Report Viewer (#2):

![Diagram showing the Report Module and Report Viewer]
Select Monthly or Quarterly report as required (#3):
You’ll get a pop-up screen (make sure you enable pop-up windows for the iPacs website):

For **Monthly reports**, select the month, year, and Agency, then click “OK”.

![Crystal Report - Internet Explorer](image-url)
You’ll get new window with a Crystal Report. At this point, it is advisable to export it to PDF by clicking on the Save/Export icon (#4) on the top left of the screen. It is quicker to scroll down the pages of a PDF document than the Crystal Report document.
Click on “Export” (#5):
Select the “Open” or “Save” option on the bottom of the screen (#6):
For Quarterly Reports, you need to enter the quarter based on the calendar year, the year, and the Agency, then click “OK”

January – March = Quarter 1
April – June = Quarter 2
July – September = Quarter 3
October – December = Quarter 4
You’ll get a screen with the report which you can then export to PDF (see Page 4):
To generate the Water Quality Report, select the “Water Quality Report (Monitoring Module)” option (#7):
You’ll get a new screen, where you’ll enter the date range and the Agency. Once this is entered, click “OK”.

[Image of a screen with options to enter start and end dates and select an agency]

Enter SampleStartDate: 7/1/2015
Enter SampleEndDate: 9/30/2015
Enter Agency: SAWPA
Enter a Value: SAWPA
Click OK
Generating the report may take a long time to process, but once it does, you’ll see a screen like this, which you can then export to PDF (see Page #4):