CIWQS WorkBook 5
Create & Maintain Places

Objectives

- Create a new place
- Relate an organization to a place
- Relate a person to a place
- Update Facility Information

Prerequisites

- None

Business Rules

- New places are not created without determining that the location doesn't already exist (So we don't create duplicate records)
- Places can be thought of as locations where some activity takes place. It could be a place of doing business, an influent or effluent inspection point, a spill location, or other activity point.

How to Create a New Place

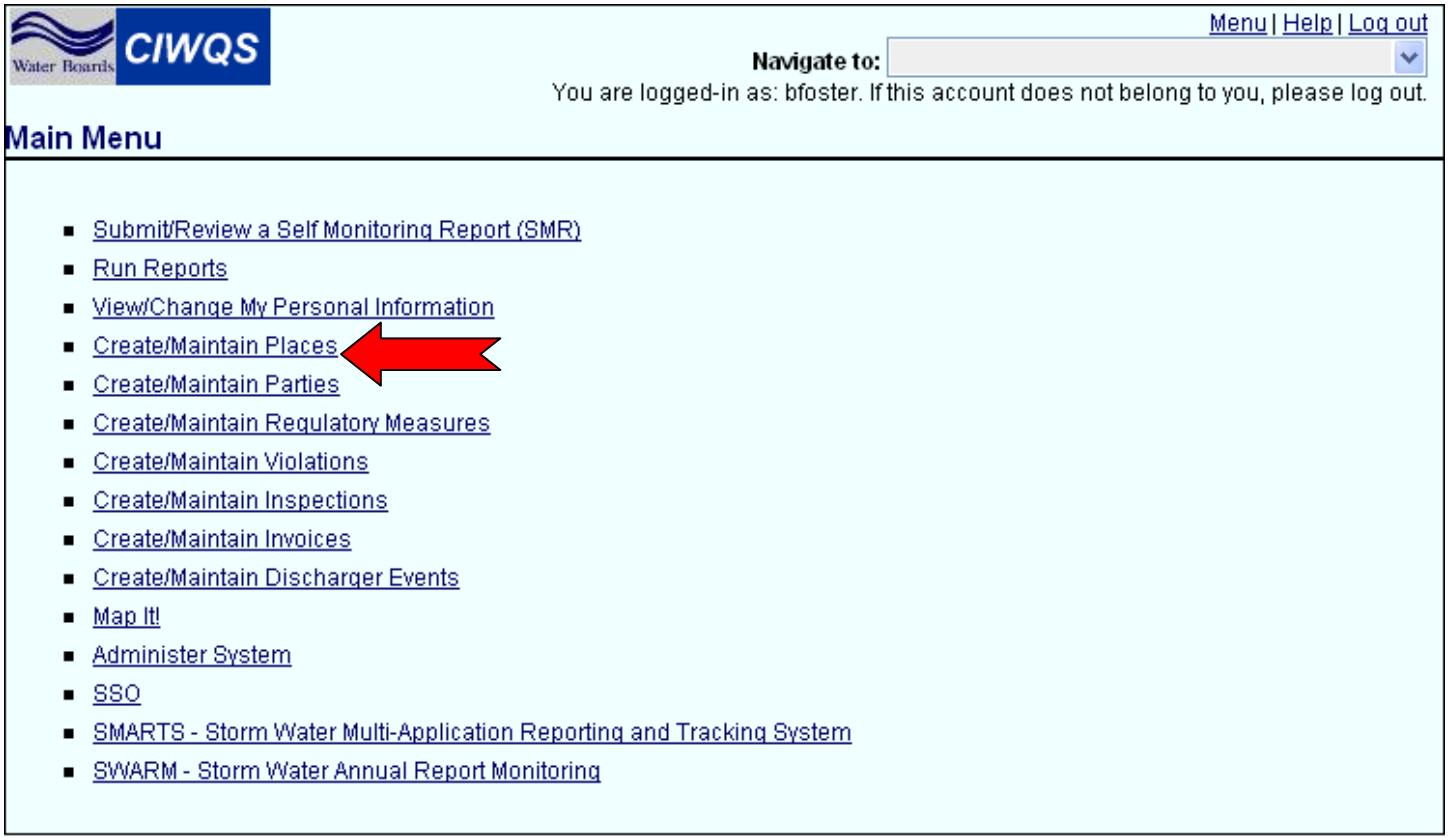
1. Enter the internet address shown in the address bar of your web browser, or press "control" and click the link to go to the CIWQS login page.

(http://ciwqs.waterboards.ca.gov/ciwqs/index.jsp)

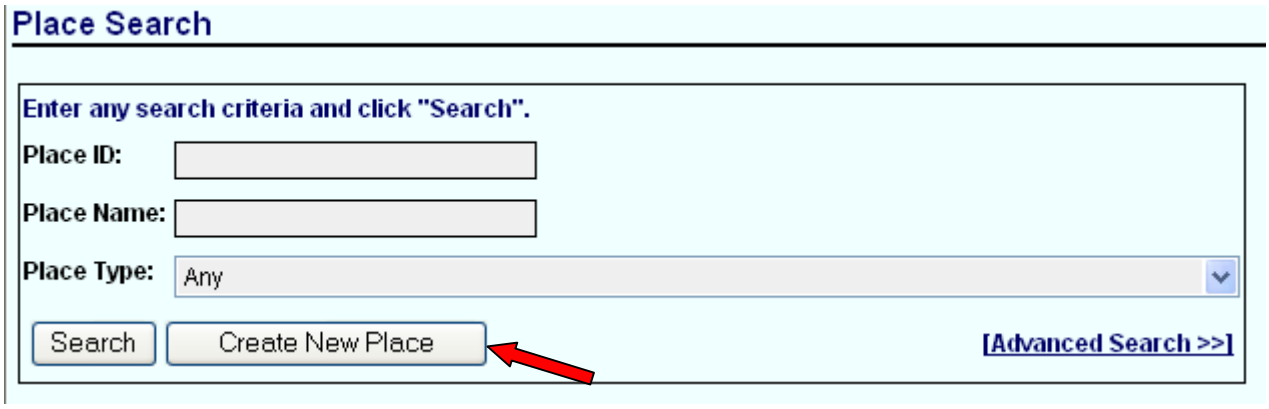
2. When the CIWQS login screen appears, enter your username and password.

CIWQS WorkBook 5
Create & Maintain Places

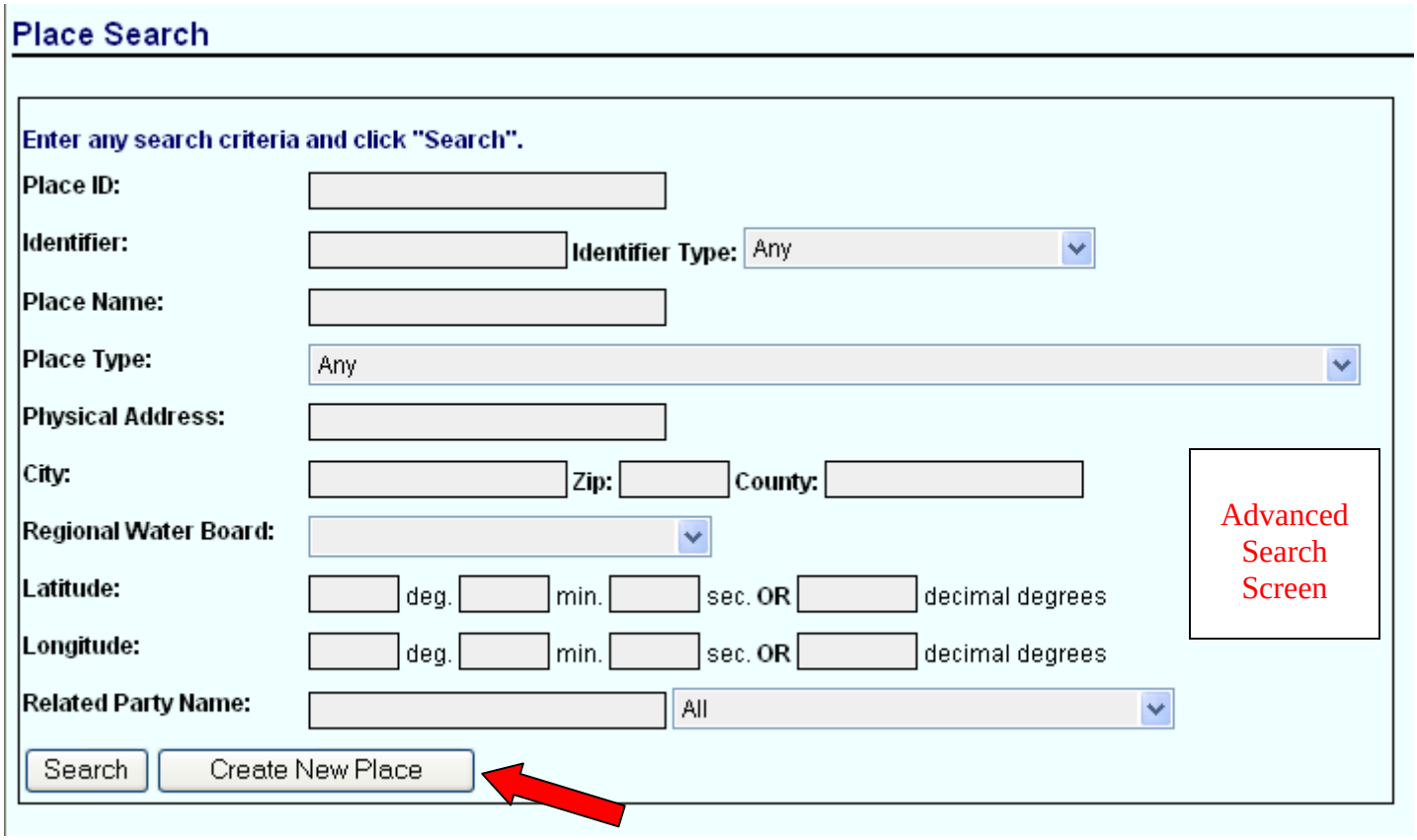
3. You will be shown the Main Menu page. Click the "**Create/Maintain Places**" link shown below.



4. Click the "**Create New Place**" button located at the bottom of either the simple or advanced search screens.



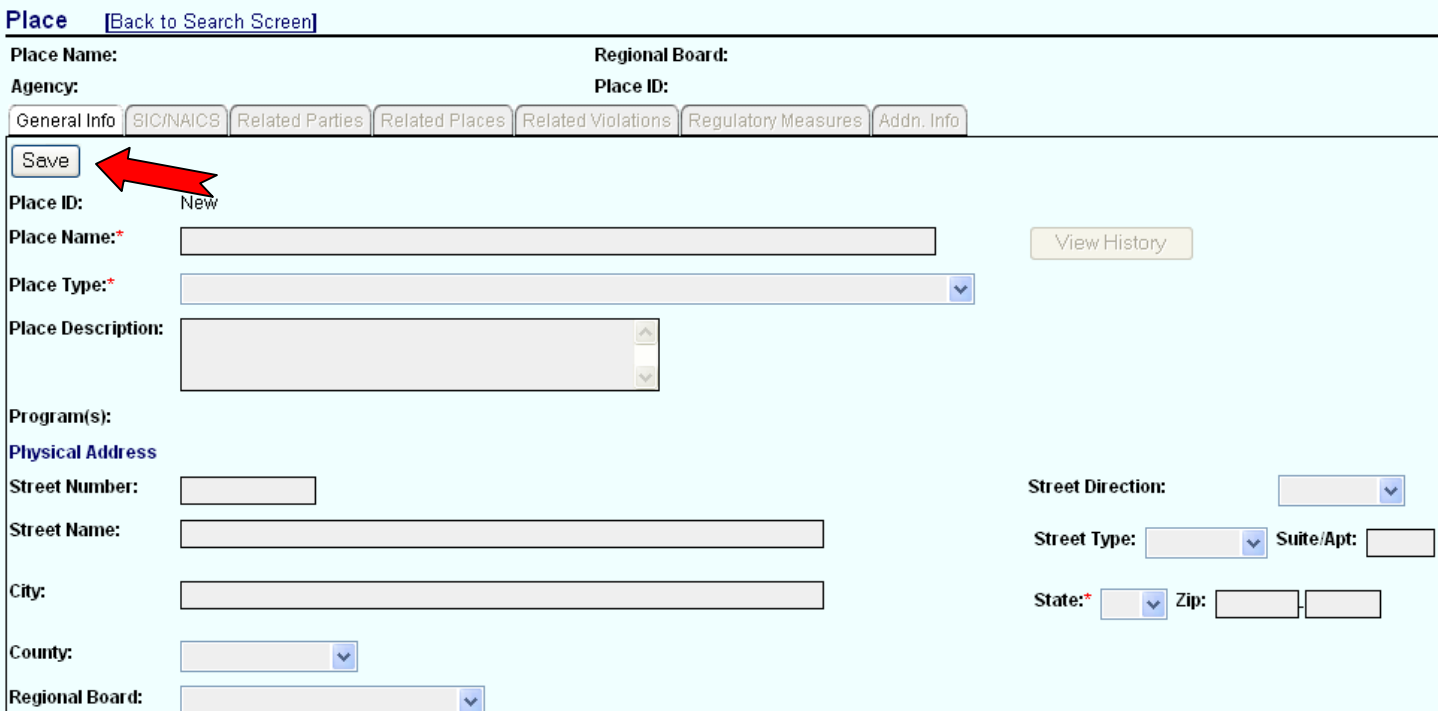
Simple Search Screen



Advanced Search Screen

CIWQS WorkBook 5
Create & Maintain Places

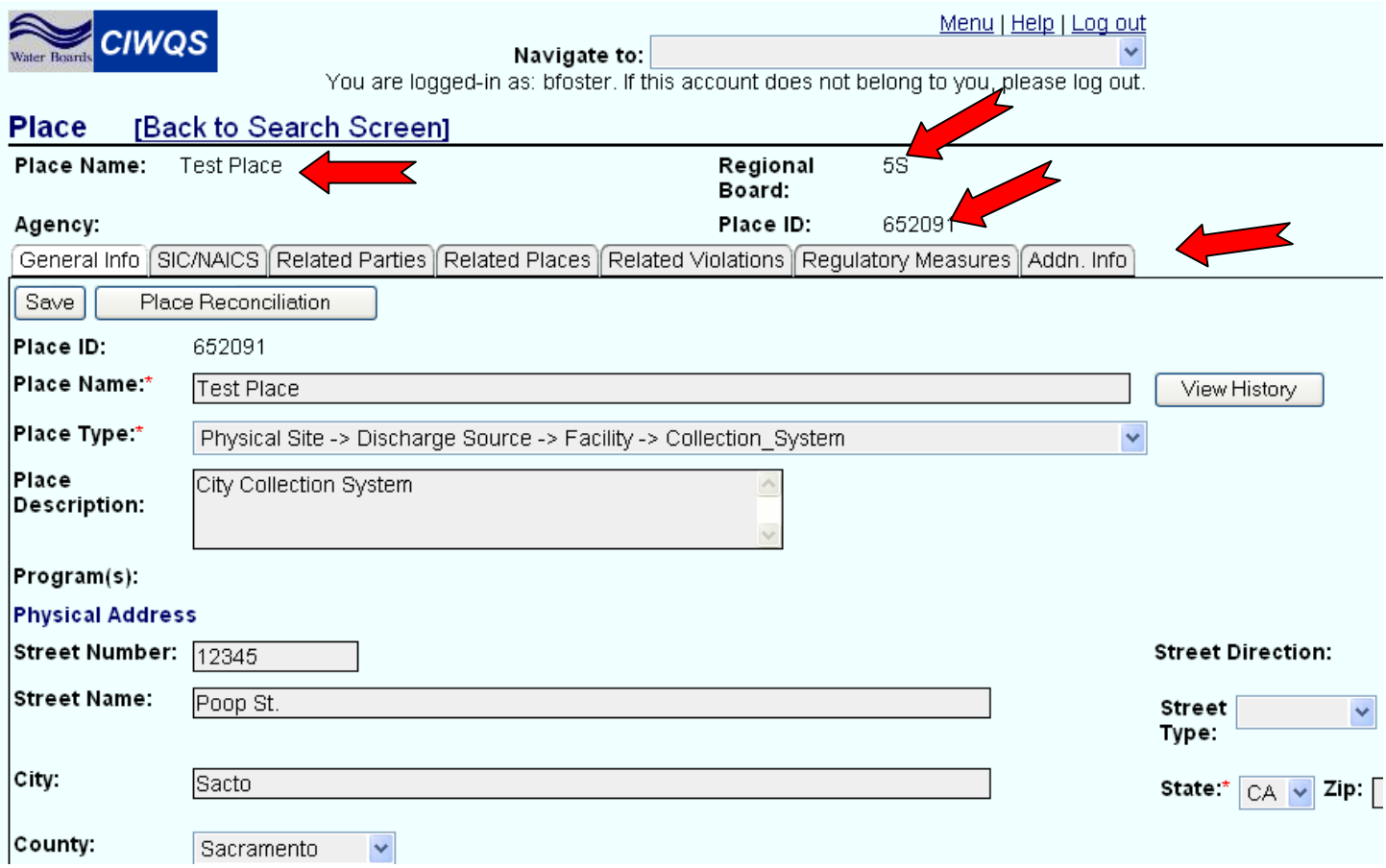
5. The blank Place page shown below appears. Fill in as many fields as possible to identify your Place. Please see below for notes from the Business Rules relating to Parties. When you have entered your data click the "**Save**" button in the upper left corner of the screen.



***Notes:** Physical addresses that are intersections or other non-traditional addresses (i.e., not a "mailing address") should be briefly described in the "street name" field, leaving street number and street type blank. Additional description can be given in the description. For example, if the site is at the end of an unnamed road close to the northwest corner of the intersection of Pine Street and Tulip Road, enter "NWC of Pine Street and Tulip Road" in the street name field. In the description field, describe "the site is at the end of an unnamed road/driveway which is approximately 30 feet north of the northwest corner of the intersection."

Physical addresses are for the geographic location and should not include P.O. Box addresses.

6. The Place page now has its fields populated with the data you just entered and the Place Name, Regional Board, and Place ID fields in the header above the tabs are now populated. Also notice that the tabs themselves are now enabled as well.



SIC/NIACS Tab of Places Module

• ***Notes from CIWQS Business Rules:** "Facilities" must have at least one Standard Industrial Classification (SIC). There must be one and only one primary SIC. SIC codes must be 4 digits. There may also be one or more linked NAICS codes. The SIC and NAICS codes are either reported by the discharger or assigned by staff when reviewing the facility operations.

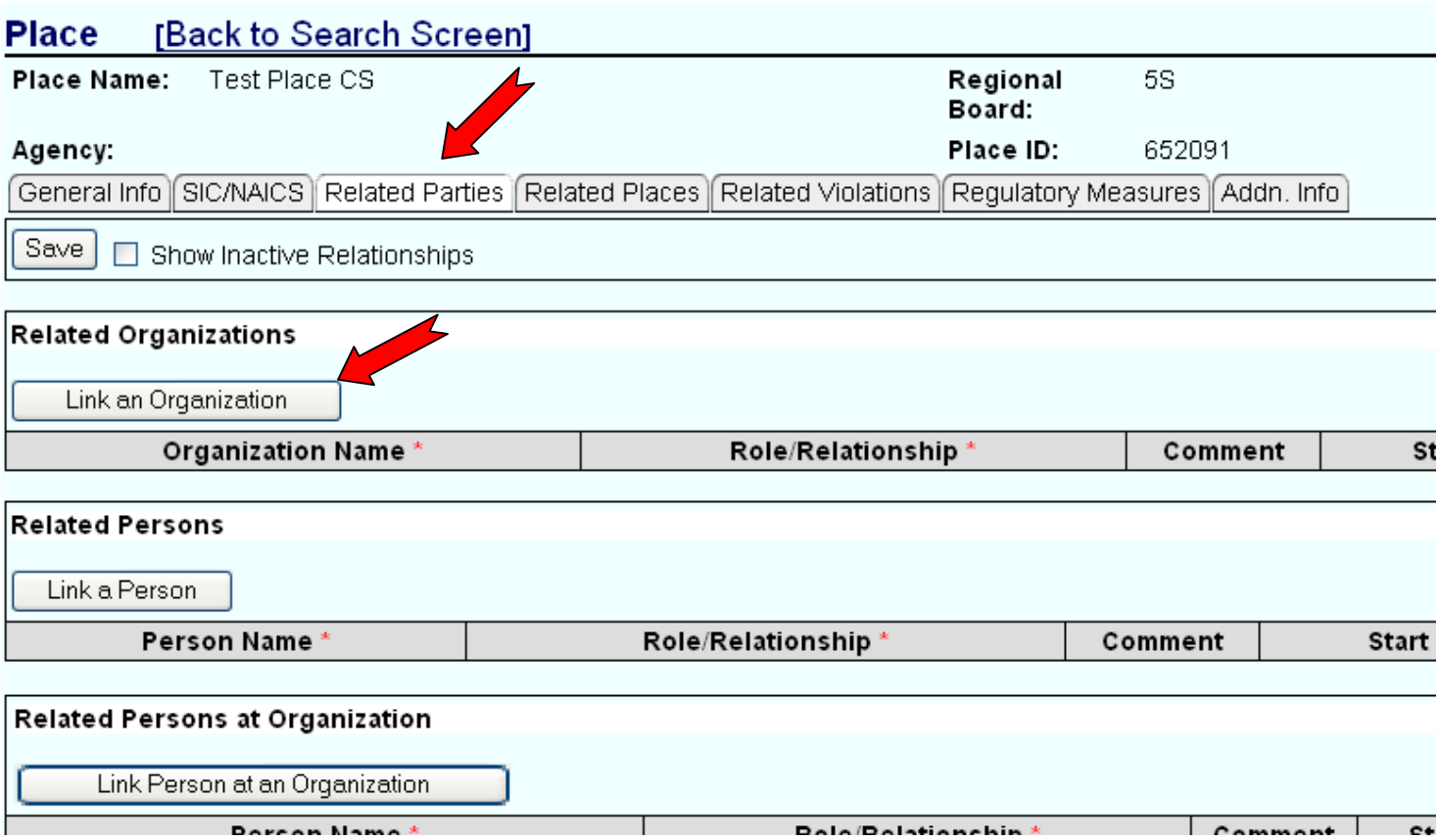
7. Click on the SIC/NAICS tab just to the right of the General tab. To select a code, click the "Link a SIC to This Facility" button. The screen below appears. A partial list of SIC codes is shown. Scroll through the list until you find the correct code. Click the "Link" hyperlink to the right of the correct code description.

Cancel Please click here for the official web site for the SIC code set.

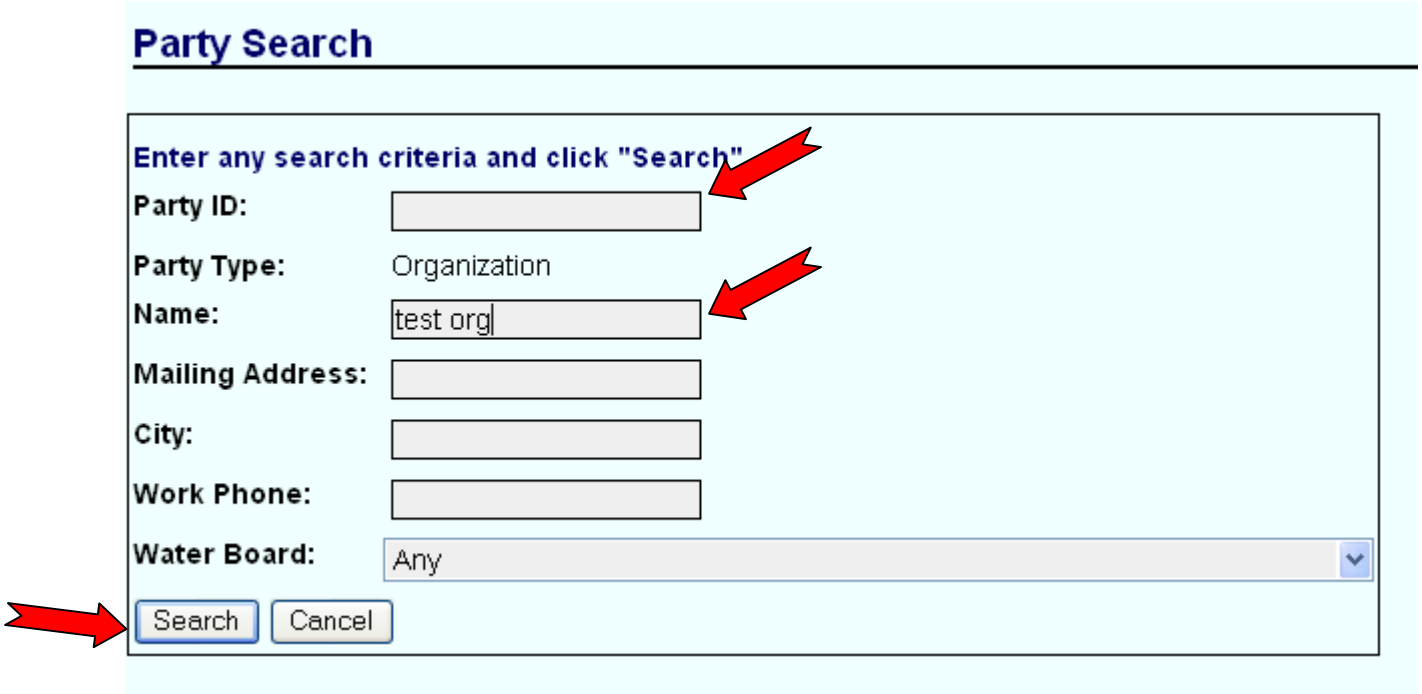
SIC Codes		
Code	Description	
3291	Abrasive Products	Link
6321	Accident and Health Insurance	Link
8721	Accounting, Auditing, and Bookkeeping Services	Link
2891	Adhesives and Sealants	Link
7322	Adjustment and Collection Services	Link
9411	Administration of Educational Programs	Link
9611	Administration of General Economic Programs	Link
9531	Administration of Housing Programs	Link
9431	Administration of Public Health Programs	Link

8. You select an NAICS code in the same fashion as a SIC code you select an NAICS code in the same fashion as a SIC code. Click on the SIC/NAICS tab just to the right of the General tab. To select a code, click the "Link a NAICS to This Facility" button. Scroll through the list until you find the correct code. Click the "Link" hyperlink to the right of the correct code description.

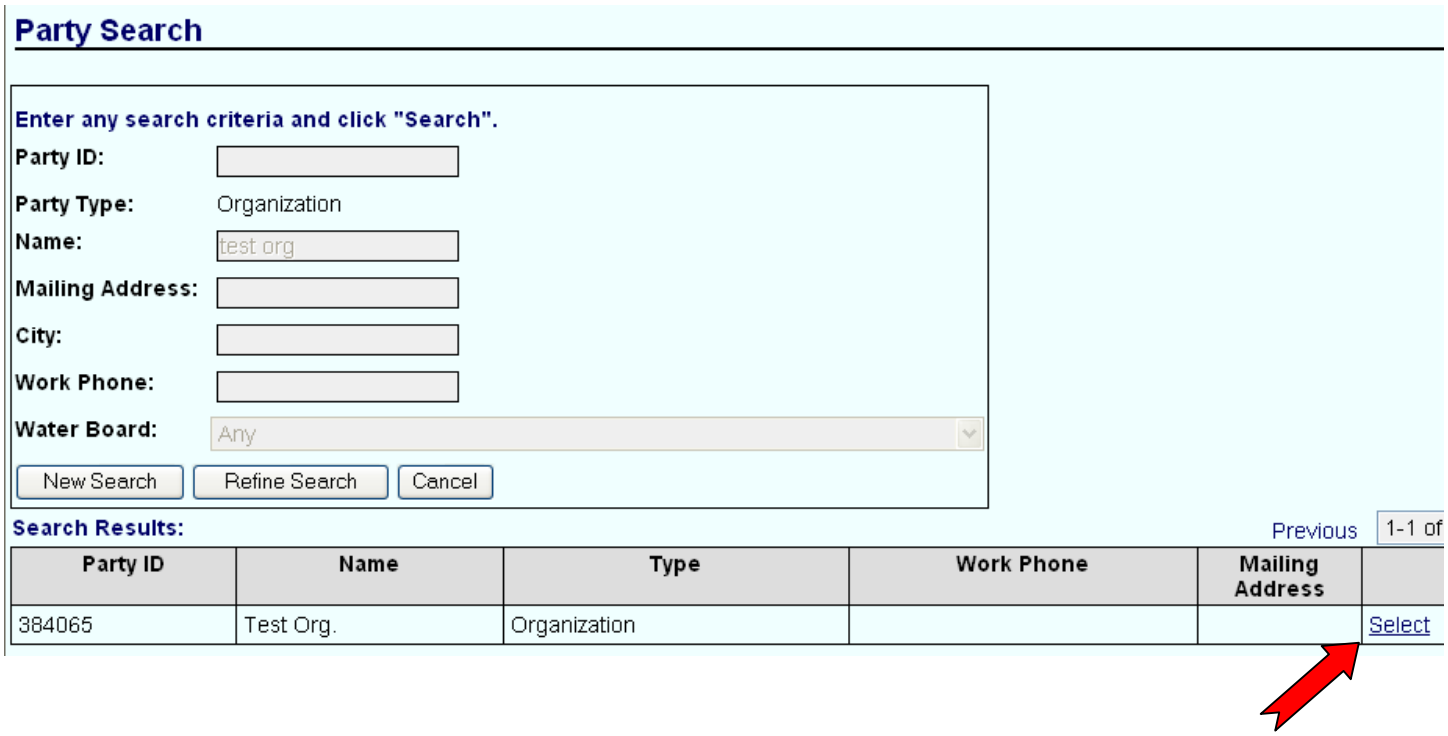
9. You can establish relationships between the subject place (Test Place) and other parties, places, or individuals who will have a relationship based on their employment or membership in a group. Select the Related Parties tab and select the "**Link an Organization"** button.



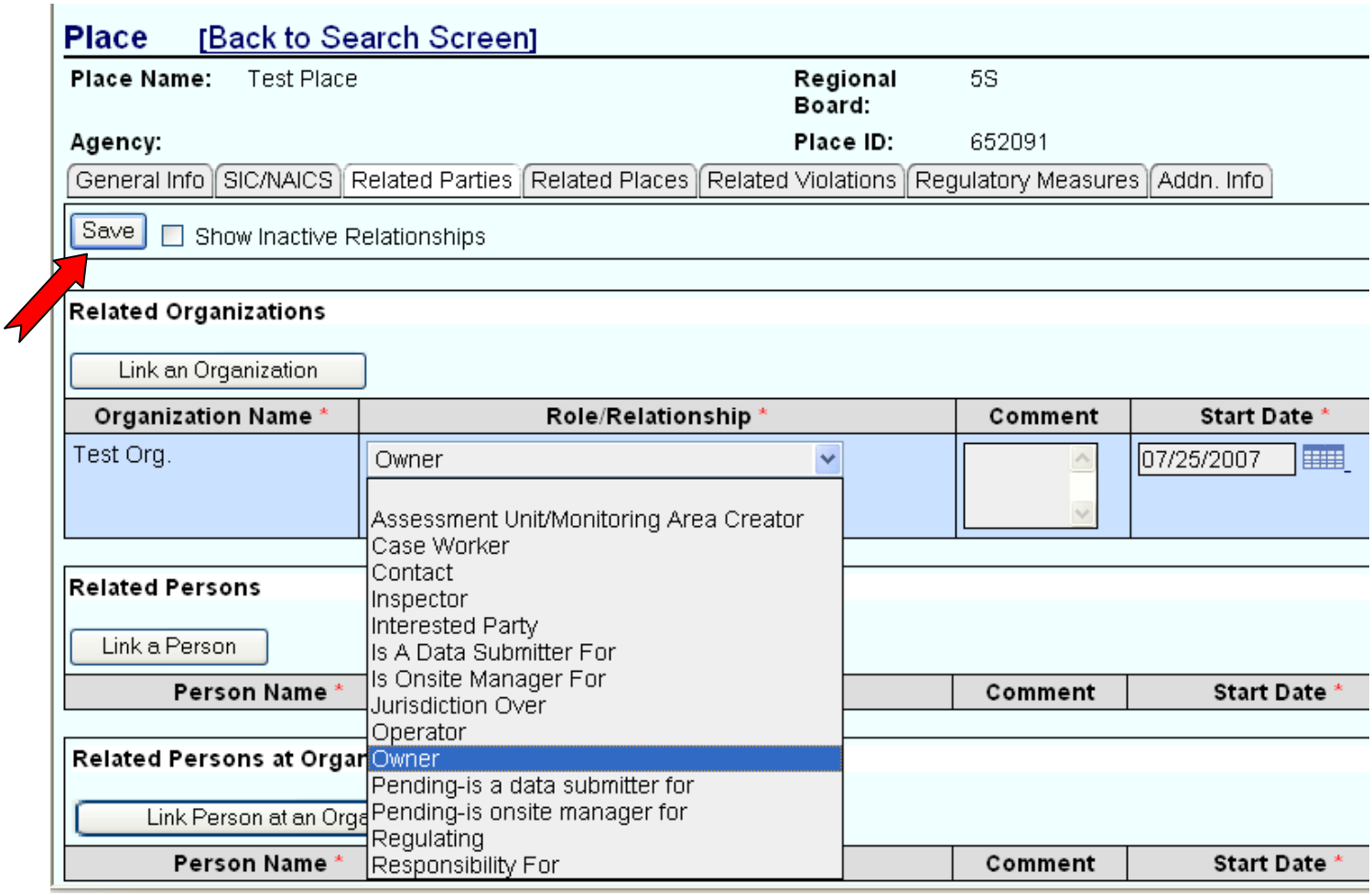
10. The Party Search screen appears. Notice that the Party type we'll be searching for is an Organization, not a person. This is because earlier we selected the "Link an Organization" button. Enter the Party name or ID, or other identifier, and click the "**Search**" button. Clicking "Search" with no identifier will return the first 300 records in the database.



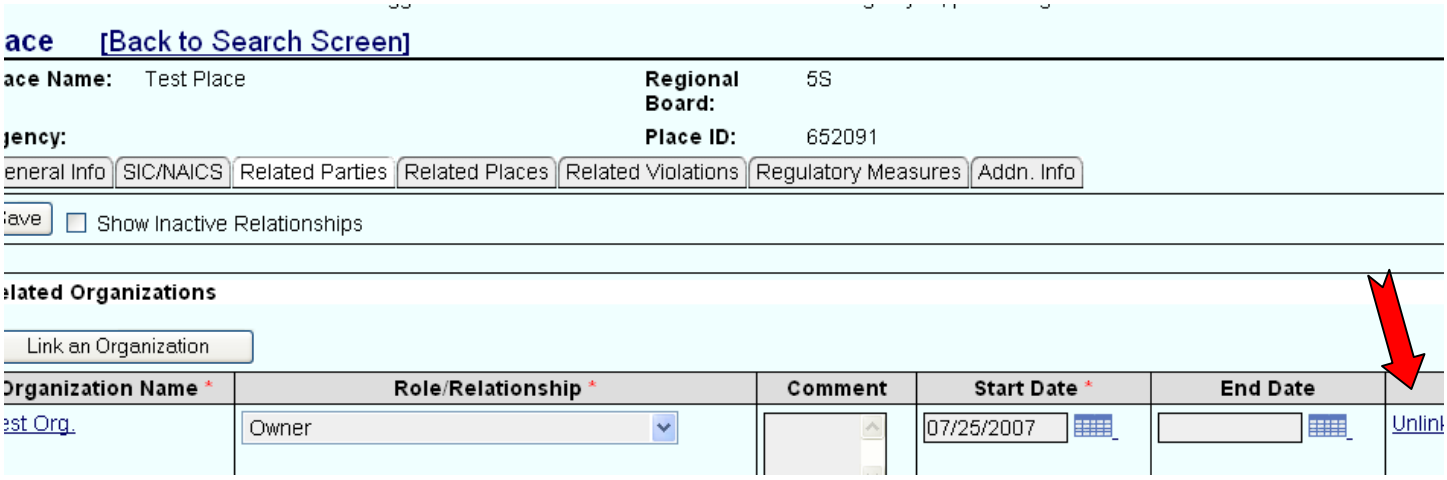
11. The search results screen appears. Find the desired party and click the corresponding "**Select**" link.



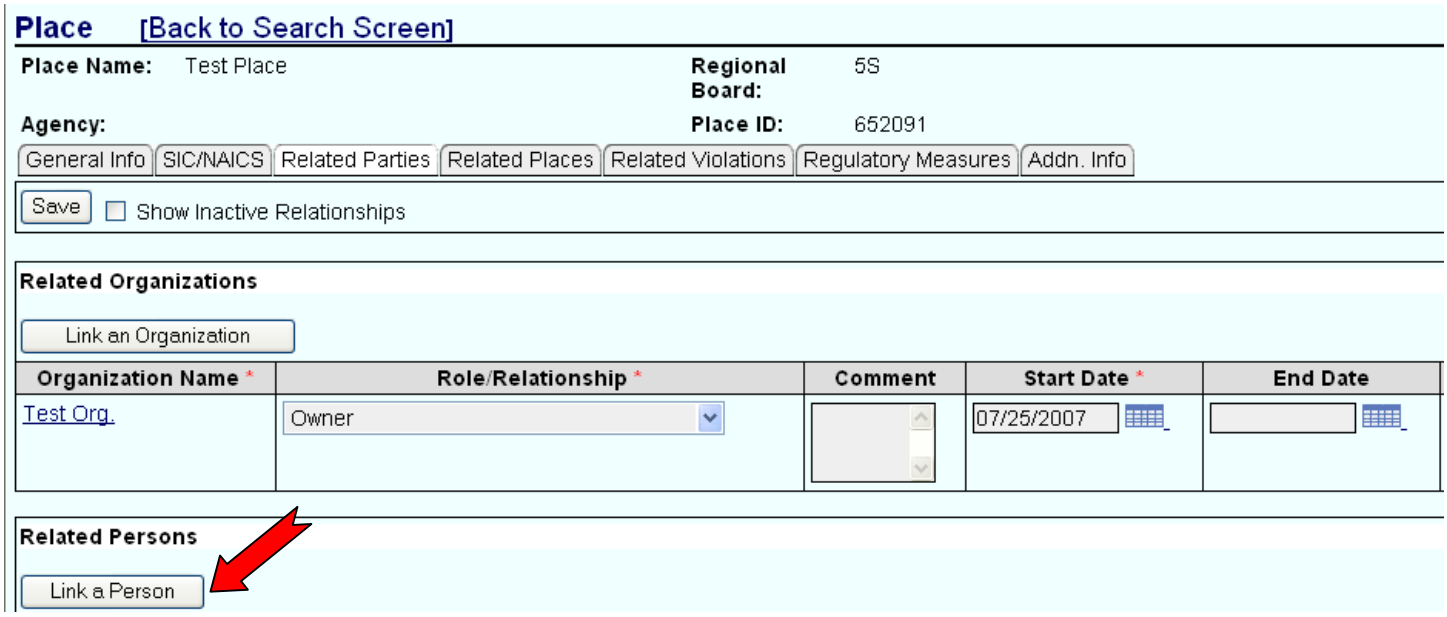
12. The selected party's name now appears under the organization name column. Select a role/relationship from the dropdown menu. The Role/Relationship dropdown menu shows a list of potential relationships, and also describes the reasons we might want to link an organization to our place. Click the "**Save**" button just below the tabs.



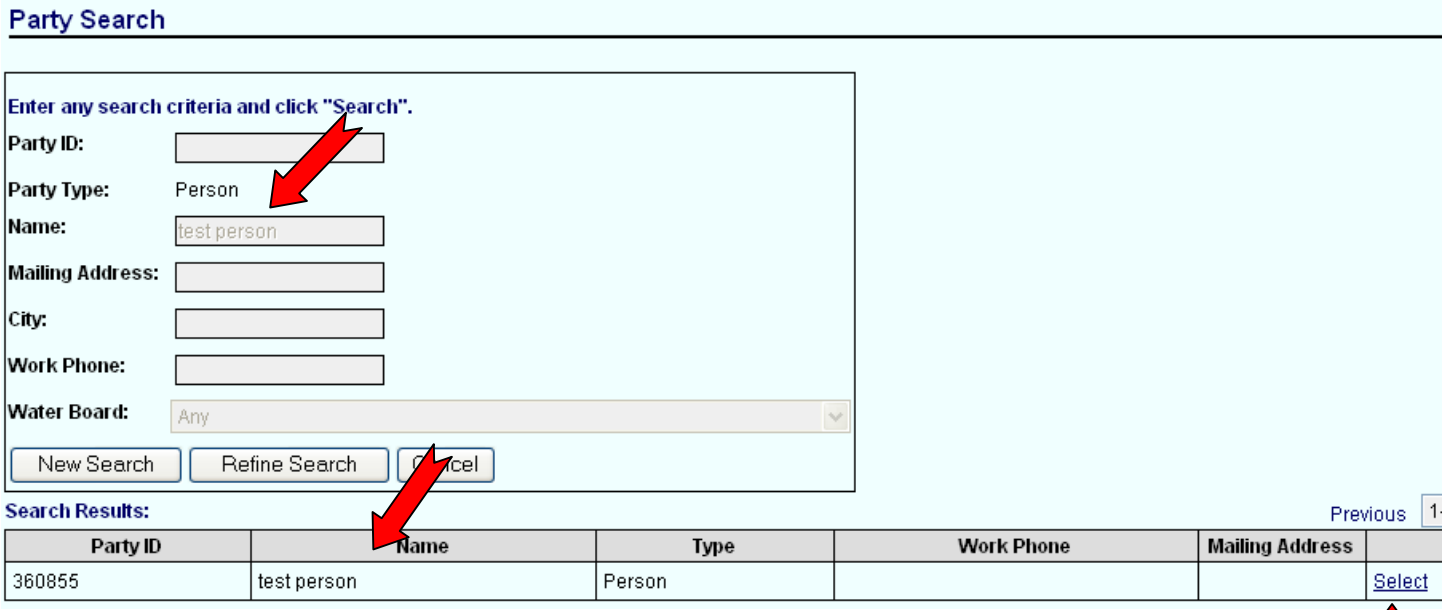
13. An “Unlink” hyperlink appears in the rightmost column, indicating the data has been saved.



14. Next, let’s link an individual to our place. Select the Related Parties tab and click the “**Link a Person**” button.

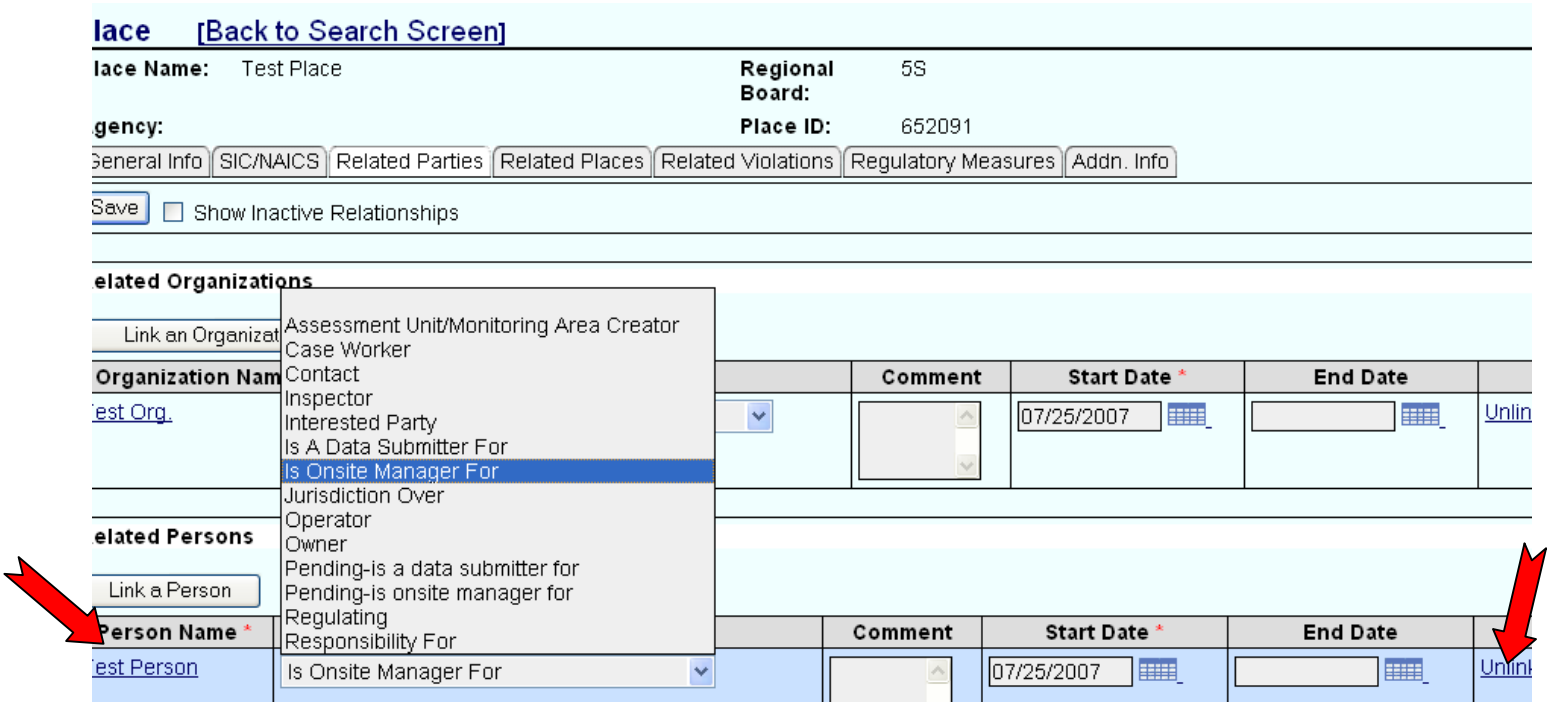


15. The Party Search screen appears. Note that the Party type here is “Person”. Enter the Party Name or ID and click “**Search**”.

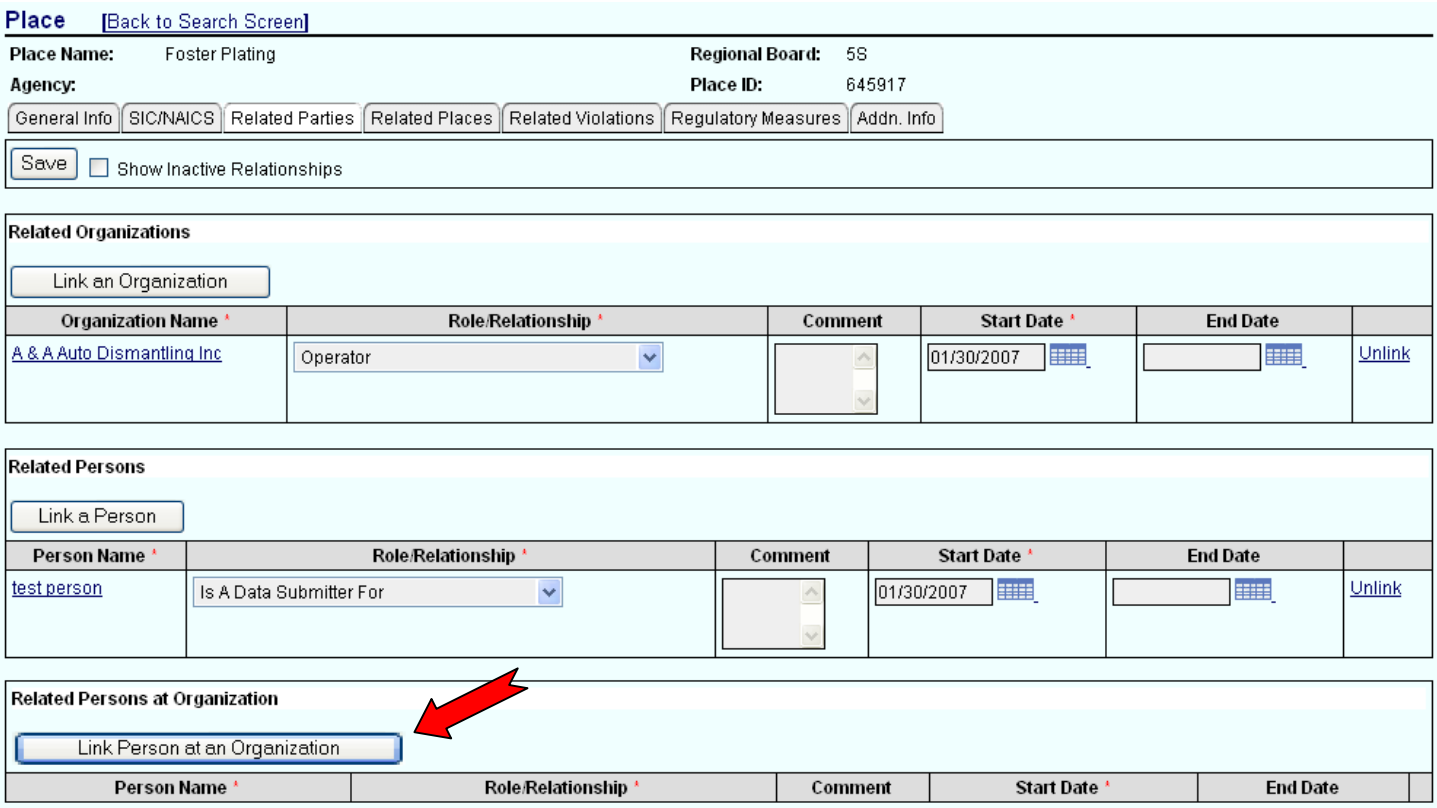


16. The Party Search results display. Multiple records may return (there could be 6 Joe Smith). Find the proper entry and click the “**Select**” link in the rightmost column.

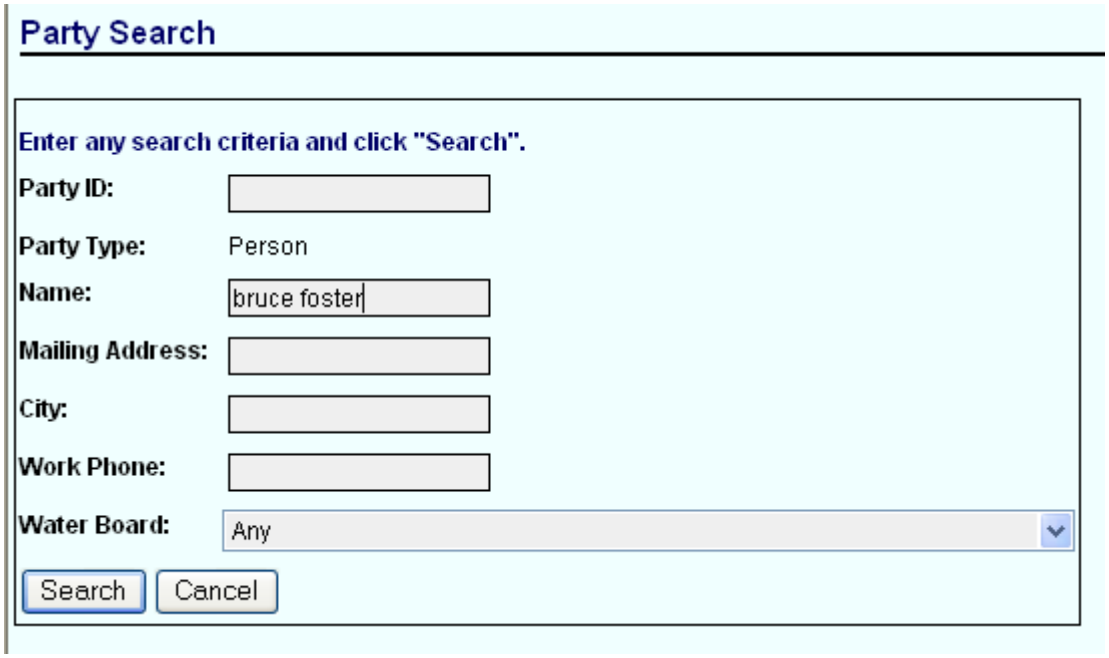
17. The screen shown below appears, with the name of the person we want to link in the "Person Name" column. Select a role/relationship from the dropdown menu. The Role/Relationship dropdown menu shows a list of potential relationships, and also describes the reasons we might want to link an organization to our place. Click the "**Save**" button just below the tabs. An "Unlink" hyperlink will appear, indicating that the data has been saved, as shown for Test Person.



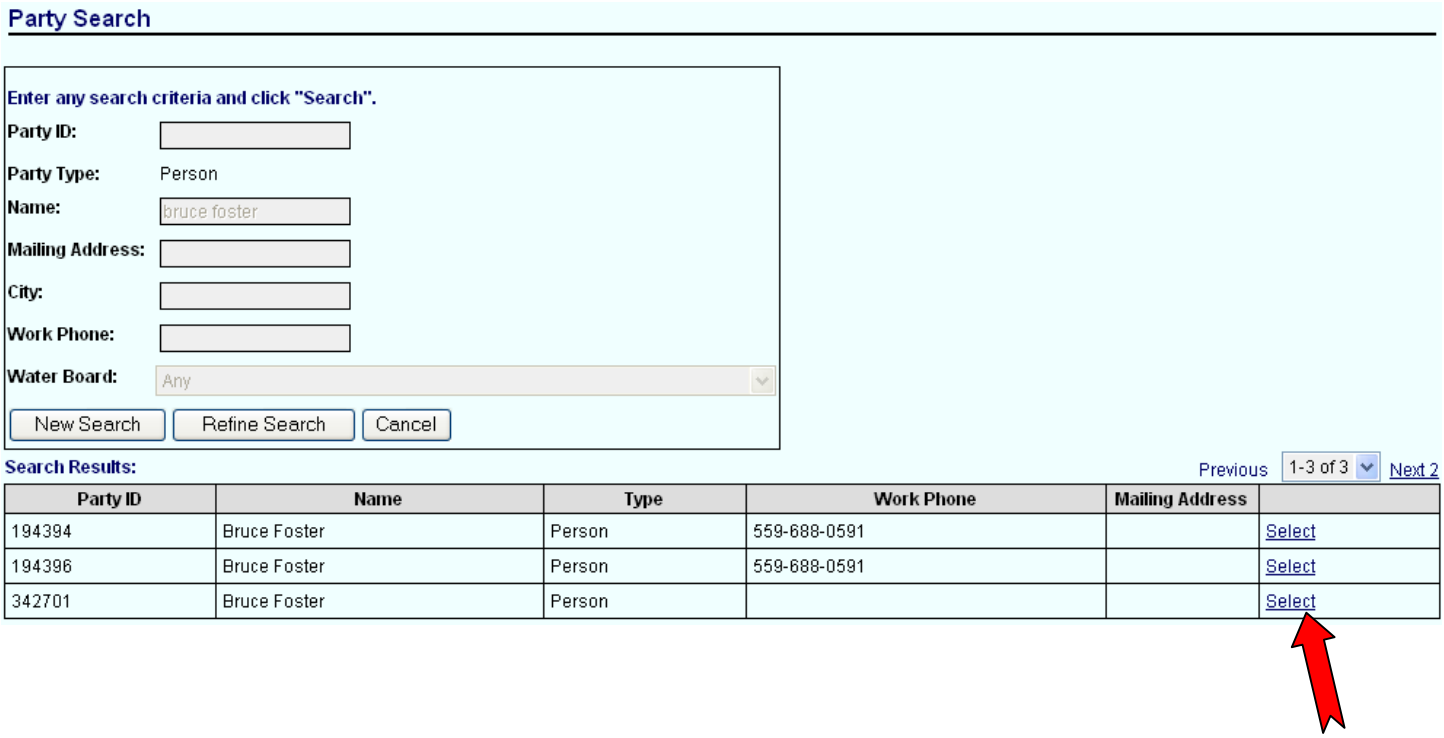
18. To link a person at an organization, the person you desire to link must have an established relationship with that organization. Click the "**Link a Person at an Organization**" button.



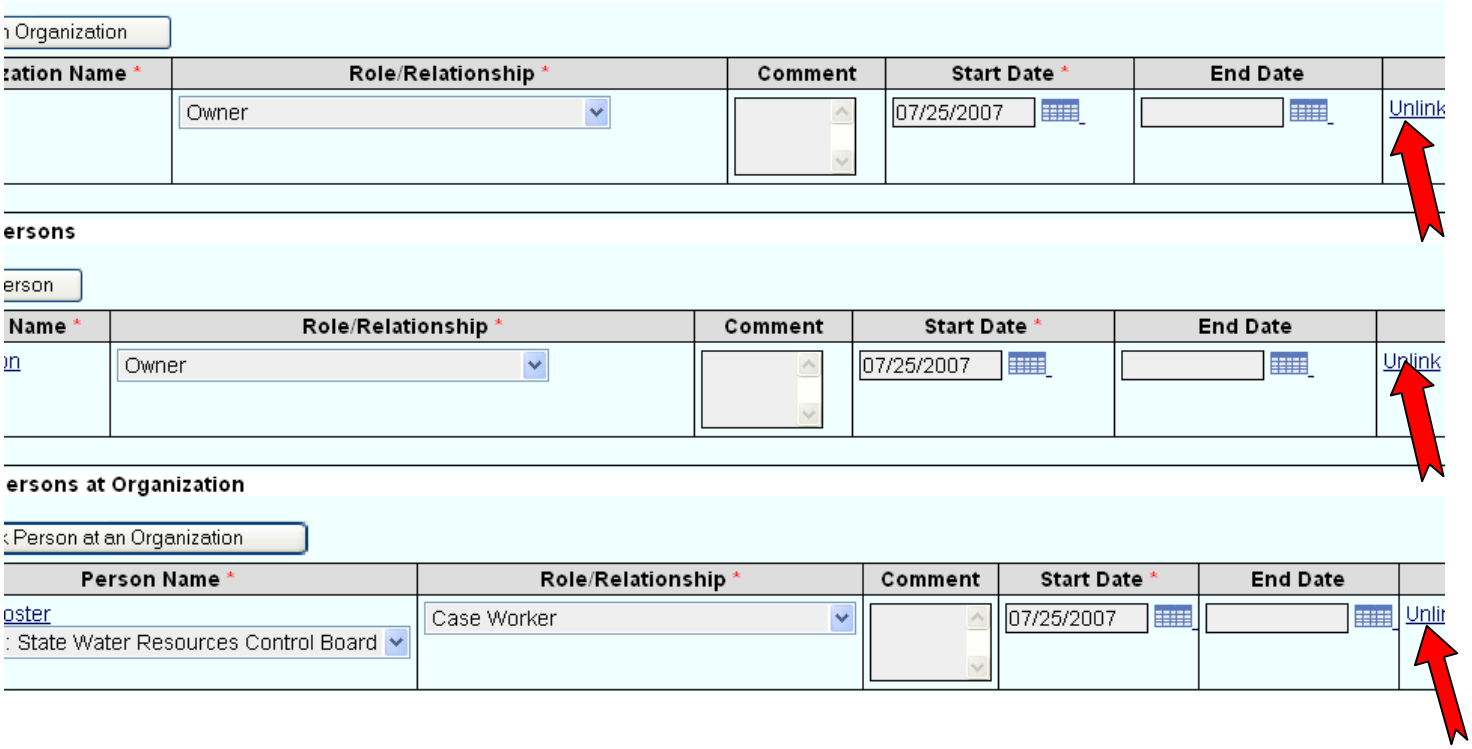
19. The Party Search screen appears. Enter the name of the person you wish to link to your place. Click the "**Search**" button.



20. The Search Results screen appears. Find the correct entry and click its corresponding "**Select**" hyperlink.



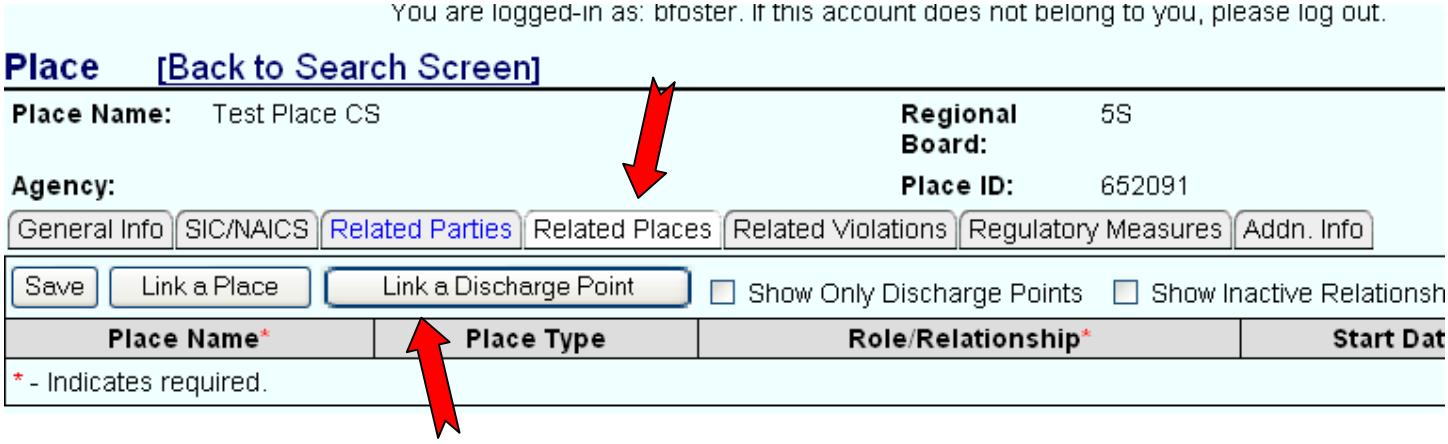
21. The desired persons name appears under the person name column along with their relationship to that organization. The dropdown menu describes possible relationships that Bruce Foster could have with Test Place as well as reasons to establish this linking. Click the "**Save**" button in the upper left of the screen. Data will save and an "Unlink" hyperlink will appear in the rightmost column, as seen with Bruce Foster and Test Person.



22. **Related Place Tab in Place Module**

At the time of this writing the only ***requirement*** to link one place to another is to link a discharge point to your place, and disharge points are only required for ***eSMR places*** (i.e., places that are related to a discharger that submits monitoring reports electronically). Other relationships are neither forbidden nor required.

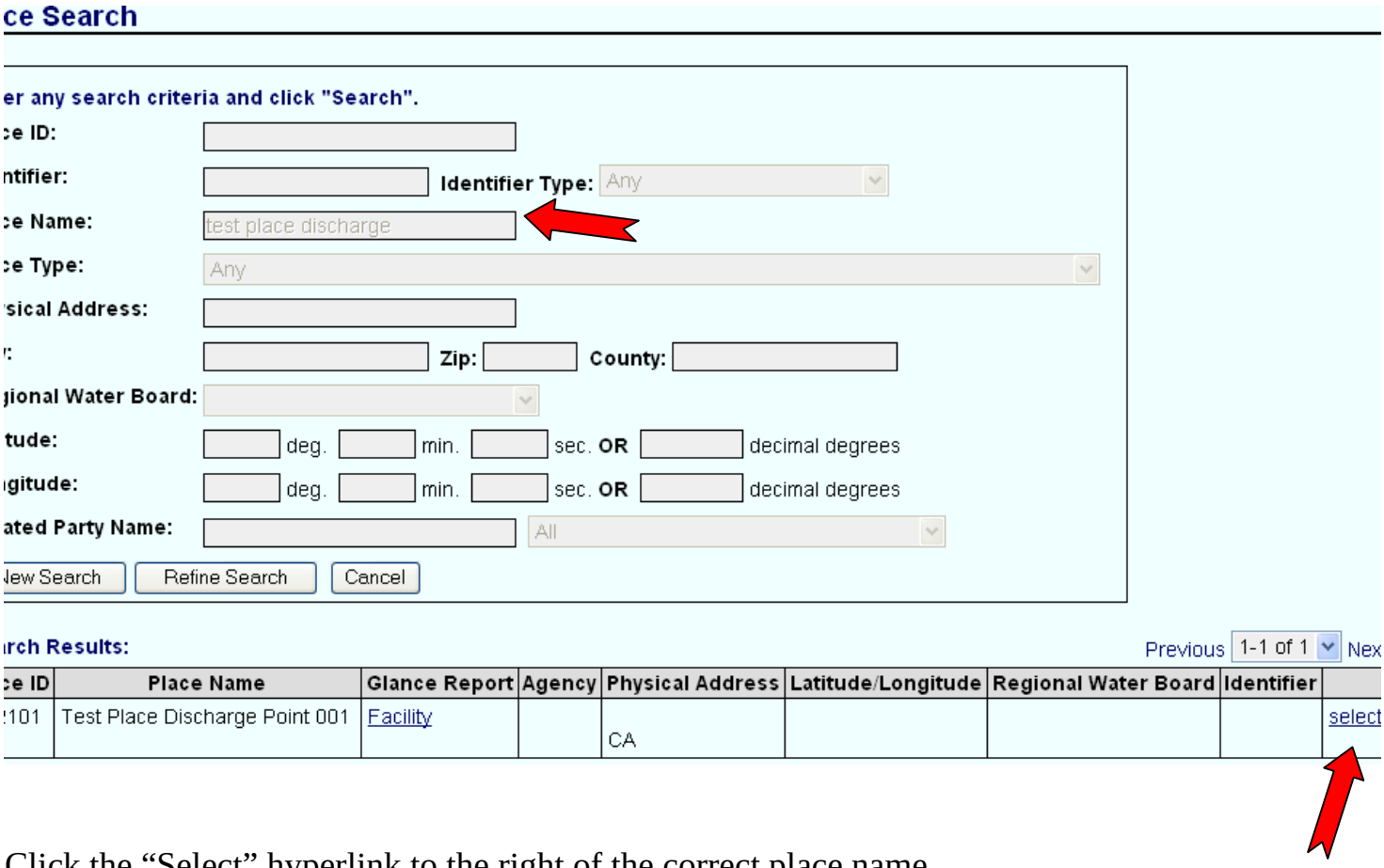
23. To link a Discharge Point to your original Place, select the "Related Places" tab and then click the "**Link a Discharge Point**" button. If the original Place is one you just created (as in our case here where we recently created the Test Place CS) you will have to create the Discharge Point as a separate Place first and then link it to the Test Place CS.



24. The Place Search screen appears. Enter the Place Name, ID, or other identifier, and click "**Search**". Again, if the Discharge Point has not been created, you'll need to create it before the database can search for it. See step 23. If you need to create a Discharge Point, please see the instructions for creating a New Place outlined earlier in this manual. For the purposes of this lesson the Discharge Point is already created, and it is called Test Place Discharge Point 001.

CIWQS WorkBook 5
Create & Maintain Places

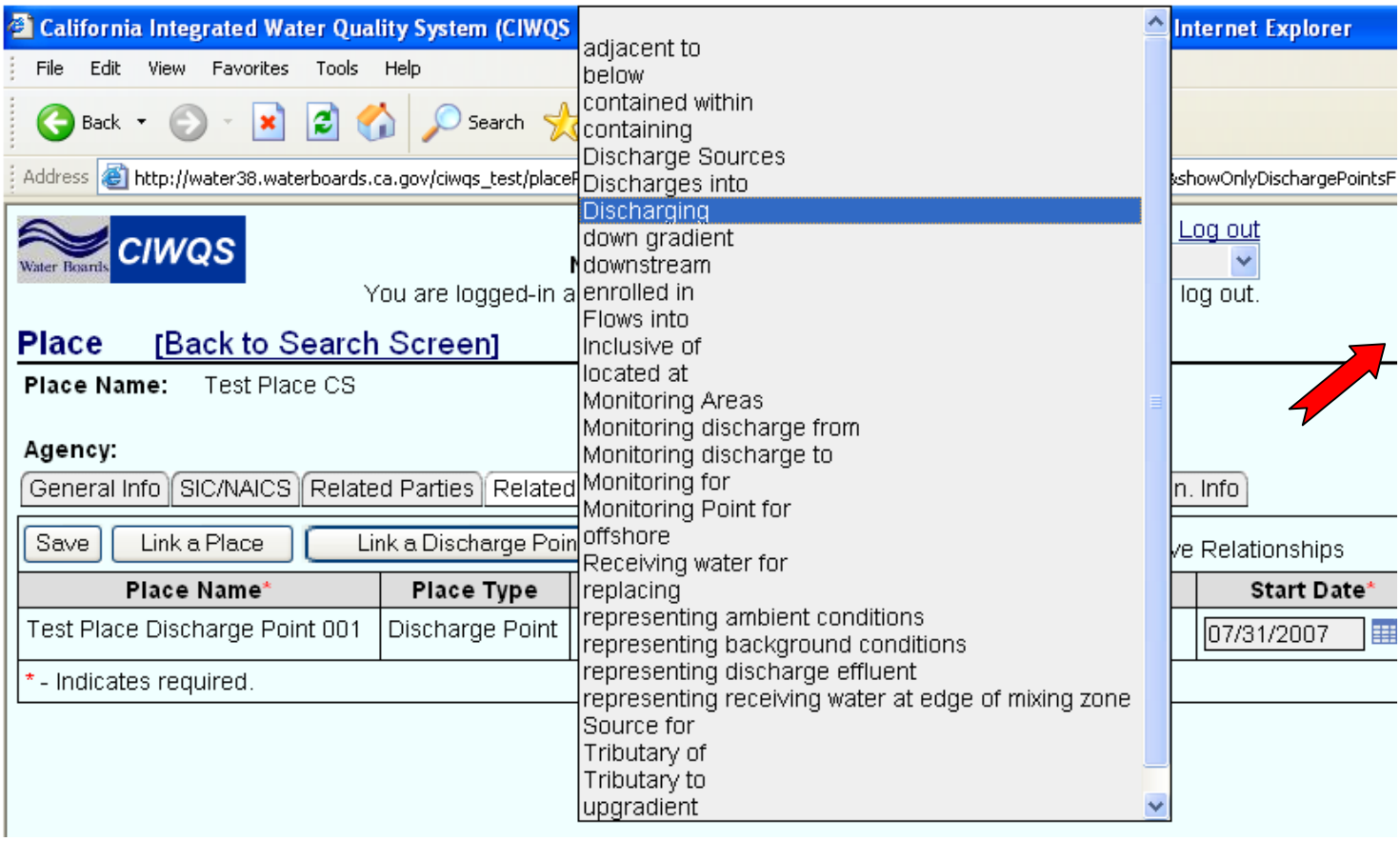
A search with no identifiers will yield the first 300 entries in the database. Enter as much info as you can to limit and focus the search. You do not need the complete name to do a string search.



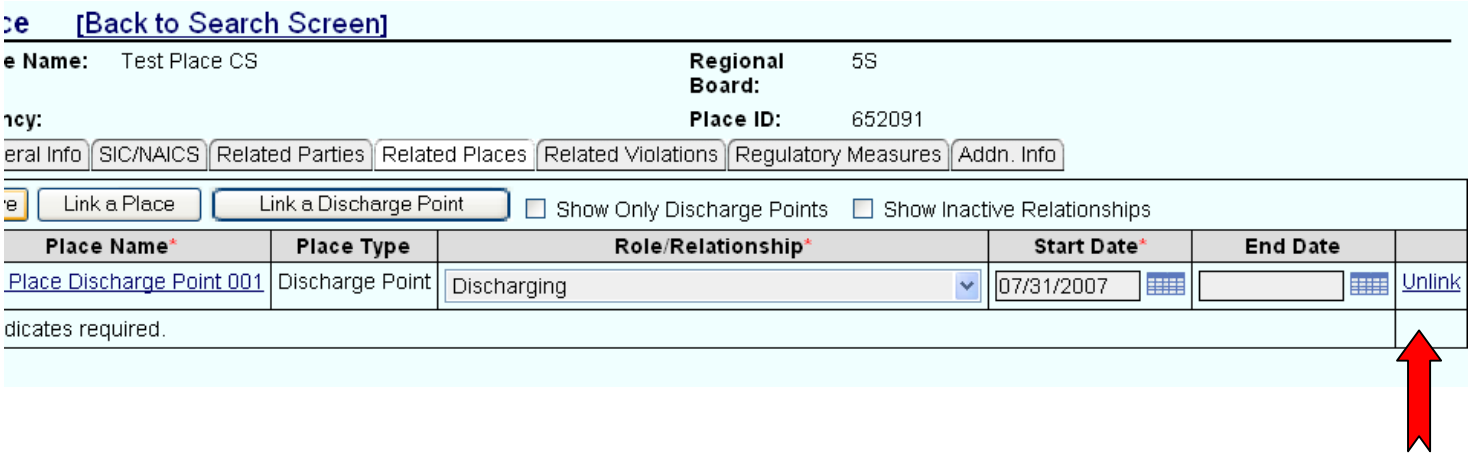
Click the “Select” hyperlink to the right of the correct place name.

CIWQS WorkBook 5
Create & Maintain Places

25. You are directed back to the Place Module with the Related Places tab highlighted, and the name of your selected Discharge Point in the "Place Name" box. Clicking the Role/Relationship dropdown menu provides a multitude of possible relationships. These relationships also describe reasons why we might wish to link another facility to our own.



26. Select a relationship and click "**Save**". An "Unlink" hyperlink will appear in the far right column, indicating that data has been saved.



Violations and Regulatory Measures can be linked to your Place, however this must be done from the Violations and Regulatory Measures modules. Please see those workbooks for further instructions.