Office of Enforcement and Compliance Assurance

Office of Compliance

E-ENTERPRISE
for the environment

Smart Mobile Tools for Field Inspectors (Smart Tools) User Documentation

Prepared by Plateau Software, Inc. for the Office of Compliance under EPA Contract No. EP-G17H-01433

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Introduction

The Office of Compliance (OC) within the U.S. Environmental Protection Agency's (EPA) Office of Enforcement and Compliance Assurance (OECA) is the national program manager for compliance monitoring of the nation's environmental laws. Employing a variety of tools, OECA/OC and its partners in states, local governments, territories, and Tribes seek to maximize compliance and reduce threats to public health and the environment. OC has developed this mobile field inspection software - Smart Mobile Tools for Field Inspectors (Smart Tools) - to support EPA and partner inspectors.

Smart Mobile Tools for Field Inspectors (Smart Tools) is a suite of digital tools supporting environmental field inspectors and their managers. Smart Tools supports improved quality, consistency and timeliness of field inspections. Smart Tools supports inspectors through the entire inspection process from scheduling an inspection to generating the draft inspection report for managerial review and, ultimately, approval. Each phase of the inspection is captured in its own module in Smart Tools for easy organization and efficient collecting of observations.

Smart Tools provides inspection managers with the tools needed to effectively plan, coordinate, and manage inspections. It helps them manage inspection timelines, review observations, and track areas of concern. Smart Tools provides Federal regulations/citations within the application. They may be linked to specific areas of concern found while capturing observations. State regulations/citations will be included in Smart Tools soon. Smart Tools also provides managers with several summary reports, in hard or soft copy for easy dissemination.

Disclaimers:

(1) User Documentation typically trails the system development process, so some screen images found in the User Guides below may not precisely match the application screens, if the application was recently updated.

(2) Some features on the depicted screens may not be visible to a particular user due to that user's assigned role ((e.g. Inspector, Web Admin, etc.)

To access Smart Tools, click the Production URL: https://smarttools.epa.gov/. If users want to practice using Smart Tools before preparing to go out on an inspection, they can go to the **Smart Tools Sandbox site** to practice using the Smart Tools features.

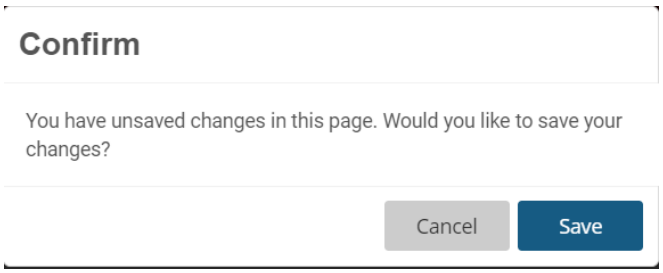
Note: Use Google Chrome for ALL Smart Tools activities:

Icon Legend

Icon	Usage
	Delete Icon
	Edit Icon
	In progress icon
	Completed icon
	Filter icon
	Sort icon
	Download icon
	Help icon
	Warning icon
	Calendar icon
	Camera icon
	Highlighter or flagging icon
	Time picker icon
	Remove or clear icon
	Add notes icon
	Edit notes icon
	Save icon
	Notification icon
	Link icon
	Add icon - Buildings/Areas
	Edit Icon - Buildings/Areas

Saving Data

Throughout the application the Save button can be found on nearly every page. Users should ensure they are saving their information after each entry to ensure no loss of data. If a user forgets to save their data prior to moving on to a separate tab, a reminder will pop up asking the user to save before moving on. If a user clicks **Cancel,** then any unsaved data will be lost:



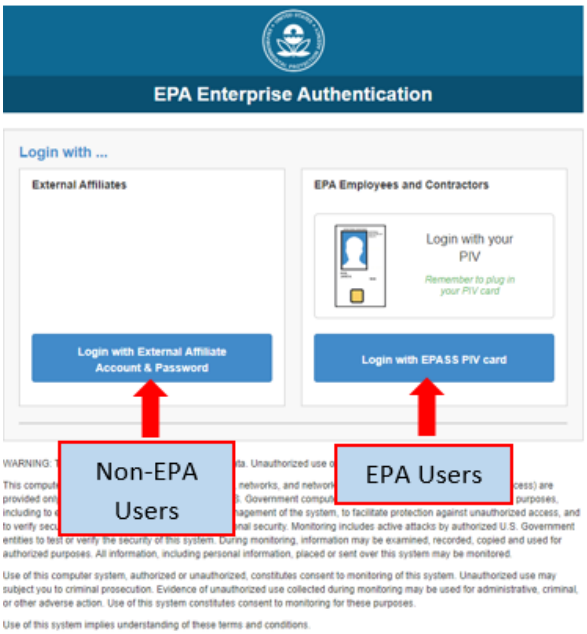
Login & Logout

Note: Prior to logging in, the user must complete the required **FedTalent Security Awareness Training**

Login

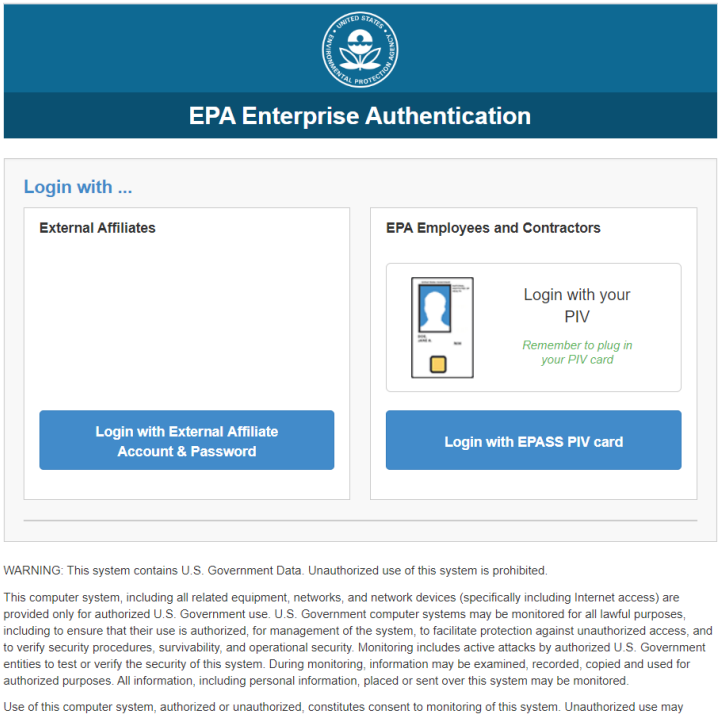
Smart Tools has been integrated with EPA's Single Sign On system called Web Access Management (WAM).

- For **EPA personnel**, users are already registered with their LAN User ID and Password. *There are no additional steps required to authenticate.
- For **non-EPA personnel**, users will need to register to have a User ID and Password assigned.



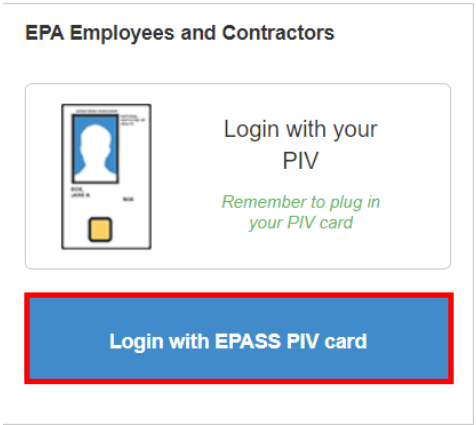
Internal Users (EPA Employees, Contractors): Login Procedures

1. Navigate to Smart Tools: https://smarttools.epa.gov
    a. Users will be navigated to the following screen for login:

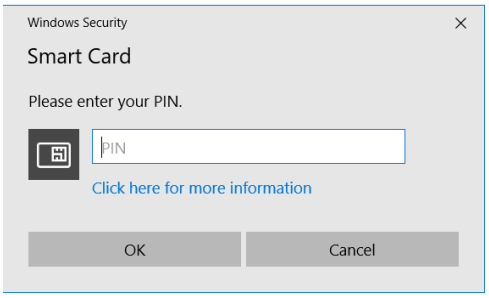


2. Insert EPA-issued PIV Card
3. Click on the **Login with EPASS PIV card**:

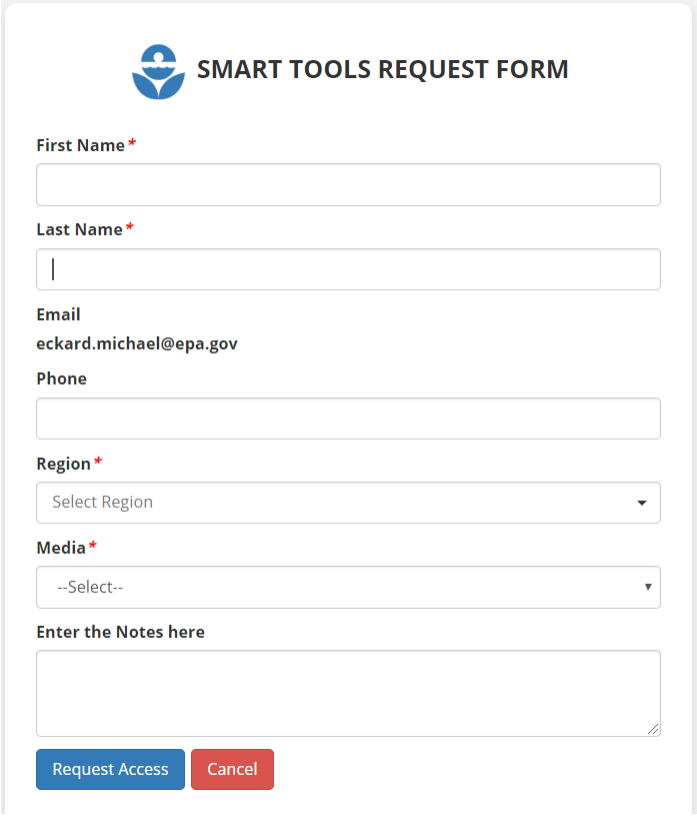
> **Note:** A user's PIV card will have two (2) certificates loaded on it. Select the **2nd certificate** for the PIV card. If this does not work, select the 1st certificate.



4. Input PIN associated with the user's PIV Card. Click **OK**:



5. If the user does not already have access to Smart Tools, the Smart Tools Request Form will automatically appear:



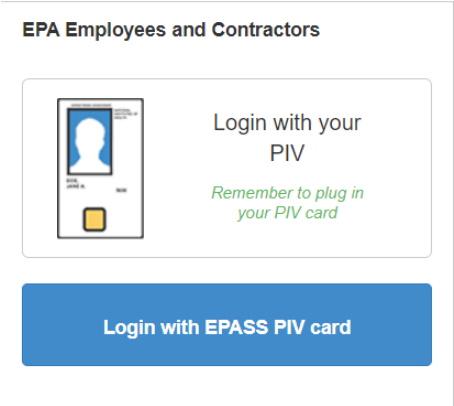
   a. Once submitted, this message will appear:

6. The designated Smart Tools Administrator for the user's organization will grant access to the requester and assign specific roles and permissions. An email will be sent to the requester's email address once this is complete.

7. Navigate back to Smart Tools: https://smarttools.epa.gov

8. Click on the **Login with EPASS PIV card**:

Note: A user's PIV card will have two (2) certificates loaded on it. Select the **2nd certificate** for the PIV card. If this does not work, select the 1st certificate.



9. Input PIN associated with user's PIV Card

10. User will be logged into Smart Tools. No further steps are required.

Note: Returning users need only to complete steps 7-10.

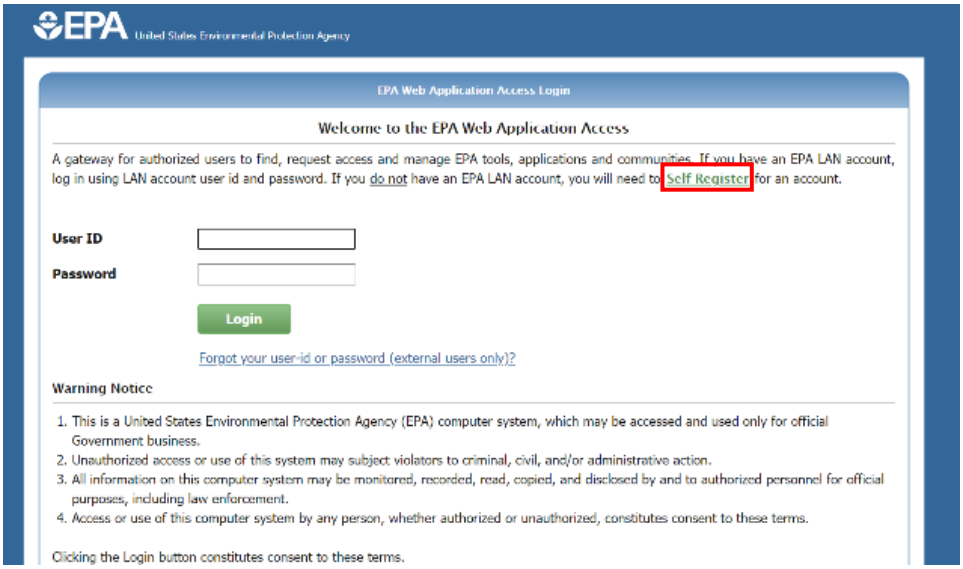
External Users (Non-EPA): Login Procedures

Note: Users must ensure they have completed the EPA Security Awareness Training prior to accessing Smart Tools. See the **FedTalent Security Awareness Training** section for additional information.

Before a User ID and Password can be assigned, users will need to know who their EPA regional Smart Tools System Administrator is, as they will need to approve the request. To locate the appropriate System Administrator, visit **Smart Tools System Administrator List**.

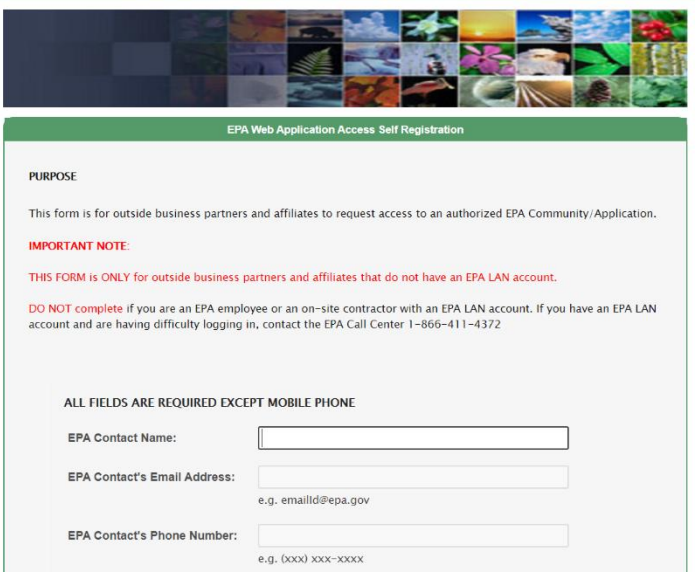
Access the EPA Portal to Register for a new WAM ID (User ID and Password)

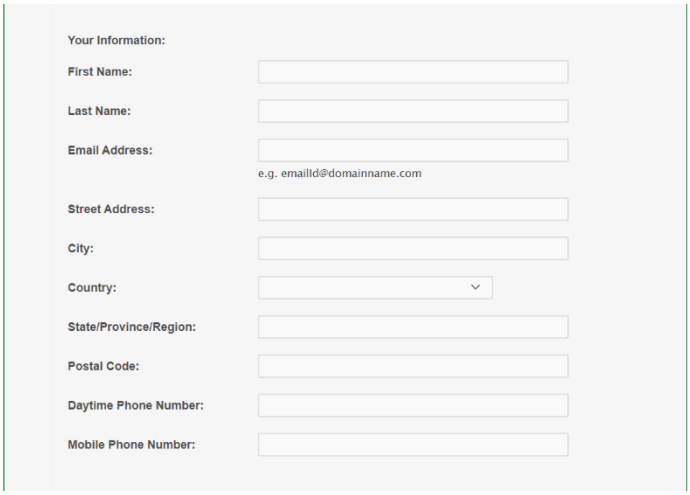
1. URL: https://waa.epa.gov.
2. To create a new account, select the "Self-Register" link.



3. Complete the request form with the appropriate information.

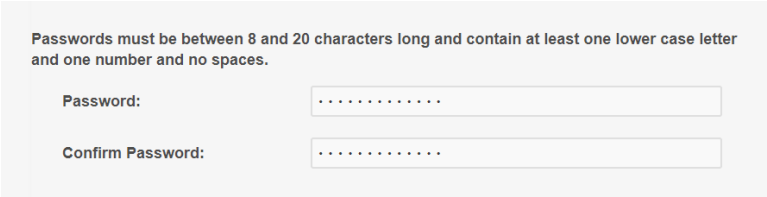
Note: *For Contact information, enter appropriate EPA System Administrator name, email address, and phone number*. For EPA System Administrators see the **Smart Tools System Administrators** list.



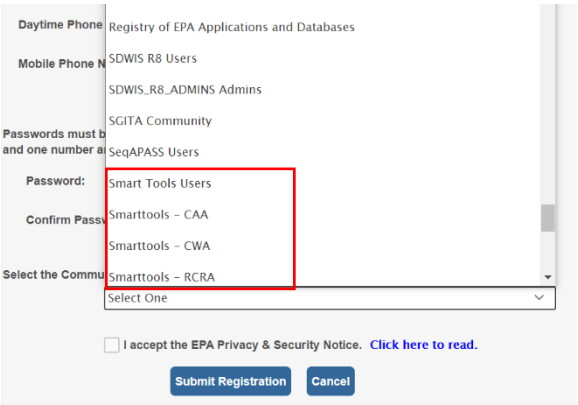


4. Create a password for the account. REMEMBER THE PASSWORD THAT YOU CREATED.

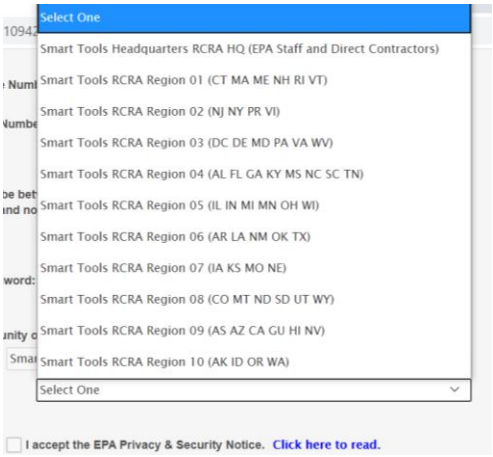
Note: EPA Web Access Management (WAM) Requires users to reset the Password every **60 days**.



5. Then, select appropriate Smart Tools User Community (media area -RCRA, CWA, CAA) from the drop-down arrow.

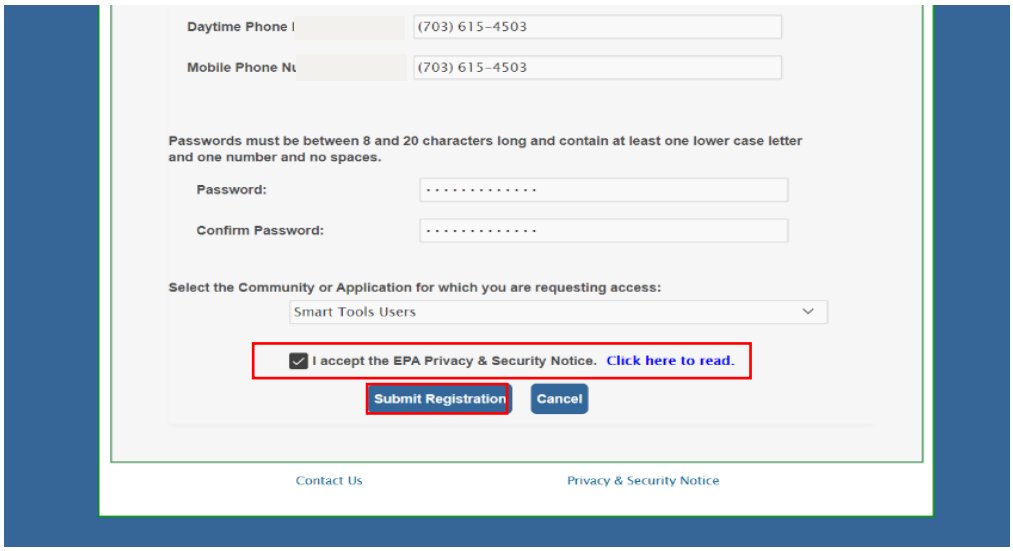


6. Next, select the respective EPA Region the user's state is assigned to.

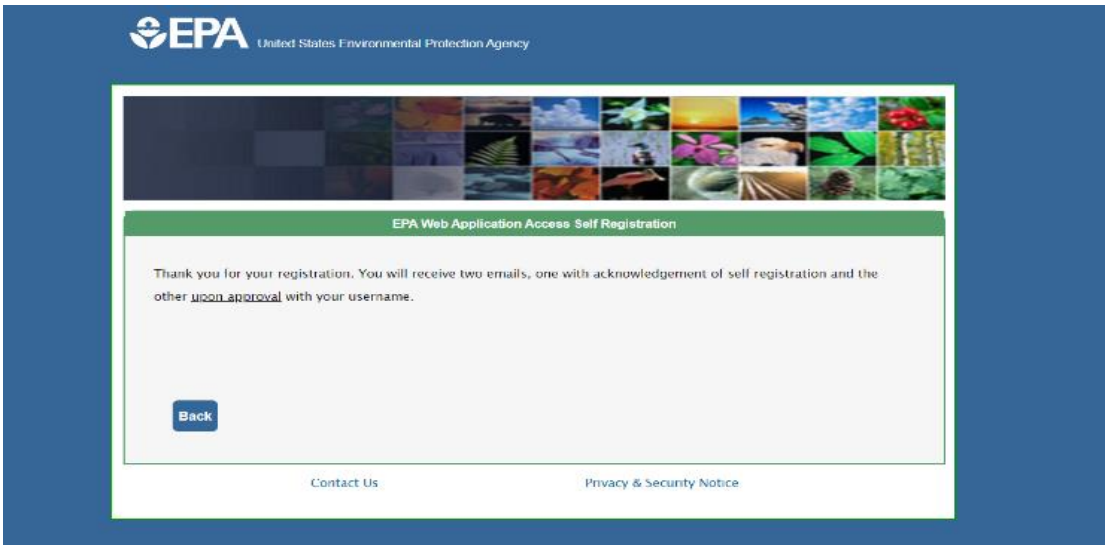


7. Read and check the **EPA Privacy & Security Notice**.

8. Select the **Submit Registration** button at the bottom of the screen.

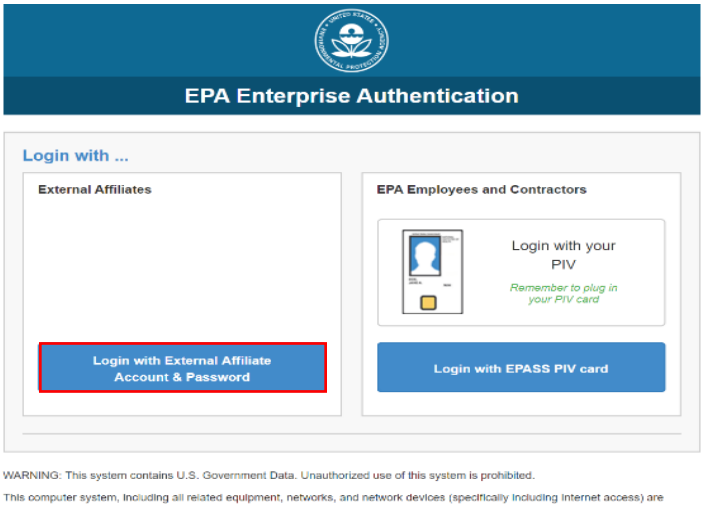


9. Once the Smart Tools System Administrator approves the user's account, the user will receive two emails—one confirming the request has been received and one with the user's new username.



10. After user's account has been approved, go to https://smarttools.epa.gov.

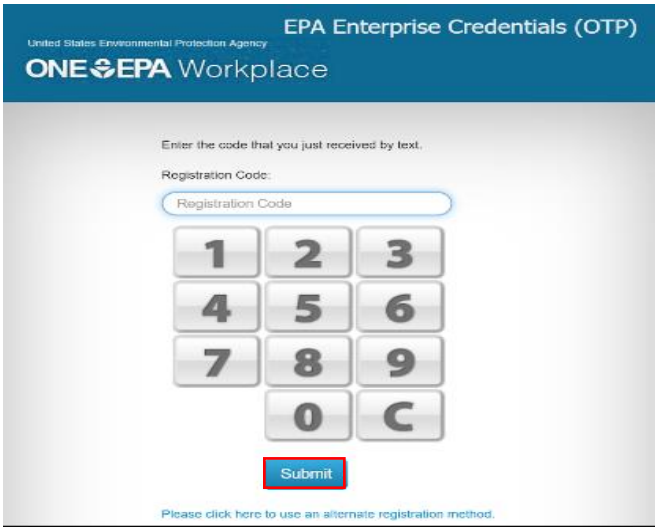
11. Select **"Login with External Affiliate Account and Password"** option.



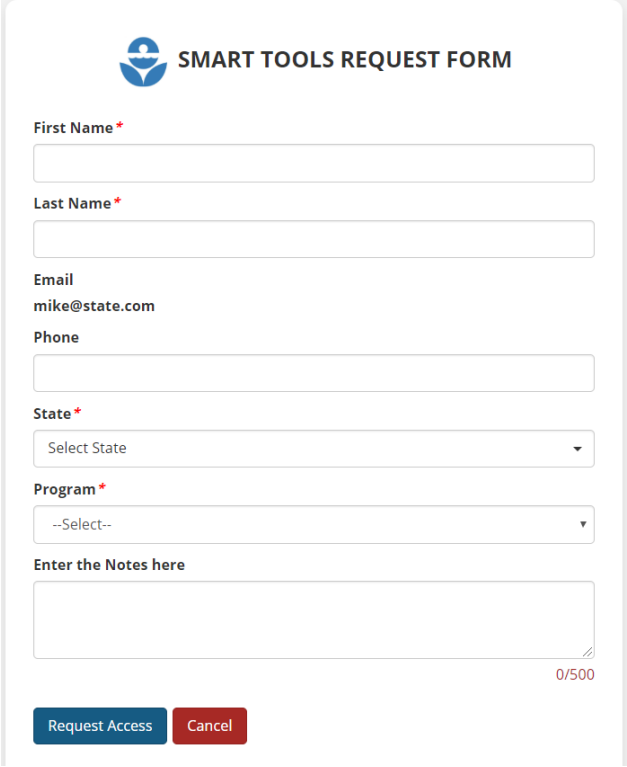
12. Enter the **username** received in the **email** and the password chosen in the Self-Registration process.

13. Select the **Submit** button to send a Registration Code to the phone number associated with the account by clicking Submit.

14. Enter the code that was sent to the phone number. Select **Submit.**



15. Users will then need to request access to the Smart Tools application using the following form:



16. A designated Smart Tools Administrator will grant access to the requester with specific roles and permissions.

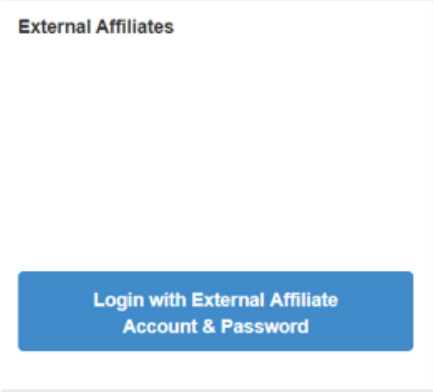
    a. An email will be sent to the requester's email address once this is complete.

SMART TOOLS HELP DESK

(703) 651-6737

Smarttoolshelpdesk@plateauinc.com

17. Navigate to the Production URL: https://smarttools.epa.gov
18. Click on **Login with External Affiliate Account & Password**:



19. Enter User ID and Password

20. User will be logged into Smart Tools. No further steps are required.

Note: Returning users need only to complete steps 17-20.

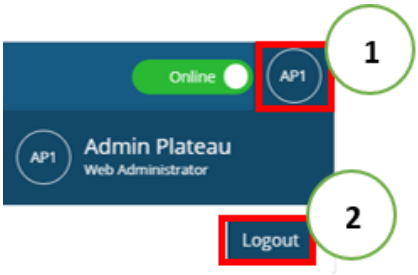
User Role Selection

For users assigned multiple roles, once a user logs in they will be able to select what role they wish to proceed with. Users are granted permissions within Smart Tools based on their role(s) within their organization.

Logout

Steps:

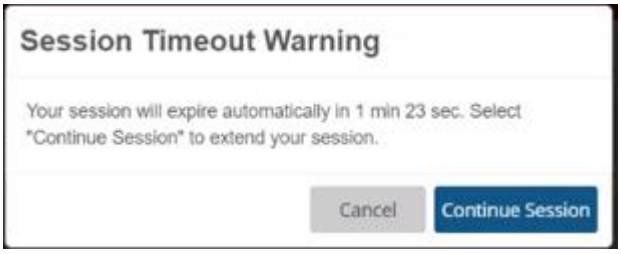
1. Click on initials in upper right corner
2. Click **Logout**.



Session Timeout

In accordance with EPA's information system security policies, Smart Tools will timeout after 15 minutes of idle time (no activity conducted in the Smart Tools application) which will automatically log out the user. Upon log out, any unsaved data will be lost. To avoid timing out, click or enter information and the timeout timer will be reset. After 10 minutes of idle time

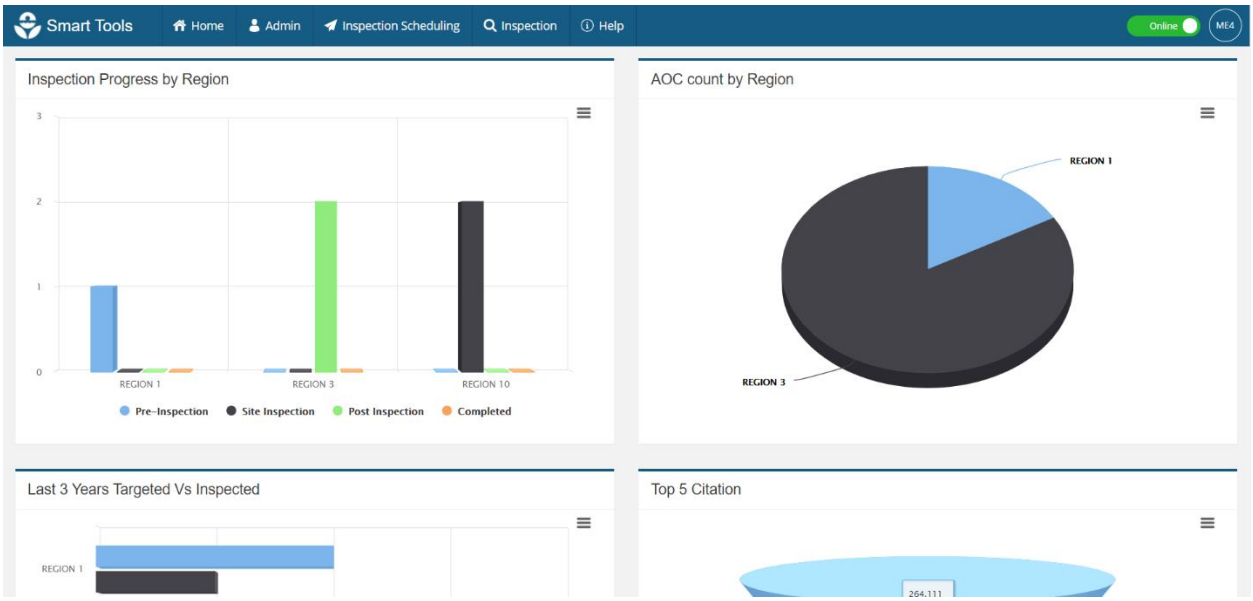
Smart Tools will have a Session Timeout Warning popup that prompts users to continue the session or cancel, allowing the session to timeout. This popup will have a running countdown until the session is renewed or the user is logged out:



Smart Tools Dashboard

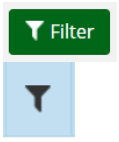
The opening dashboard presents metrics that provide a snapshot view of work in Smart Tools.

Note: The Smart Tools Dashboard only displays data populated in Smart Tools. The Dashboard does not pull from source systems to populate this data.



Filters

On nearly every page throughout Smart Tools there is a filter option to quickly locate specific users, facilities, inspections, or data inside of each inspection. Throughout Smart Tools users will find the following icons representing the filter feature:



Note: The Applied Filter will remain until it is reset, or the search criteria is changed

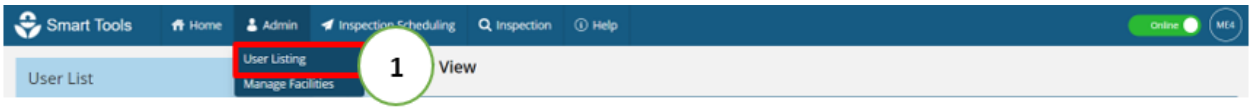
Admin

User Listing

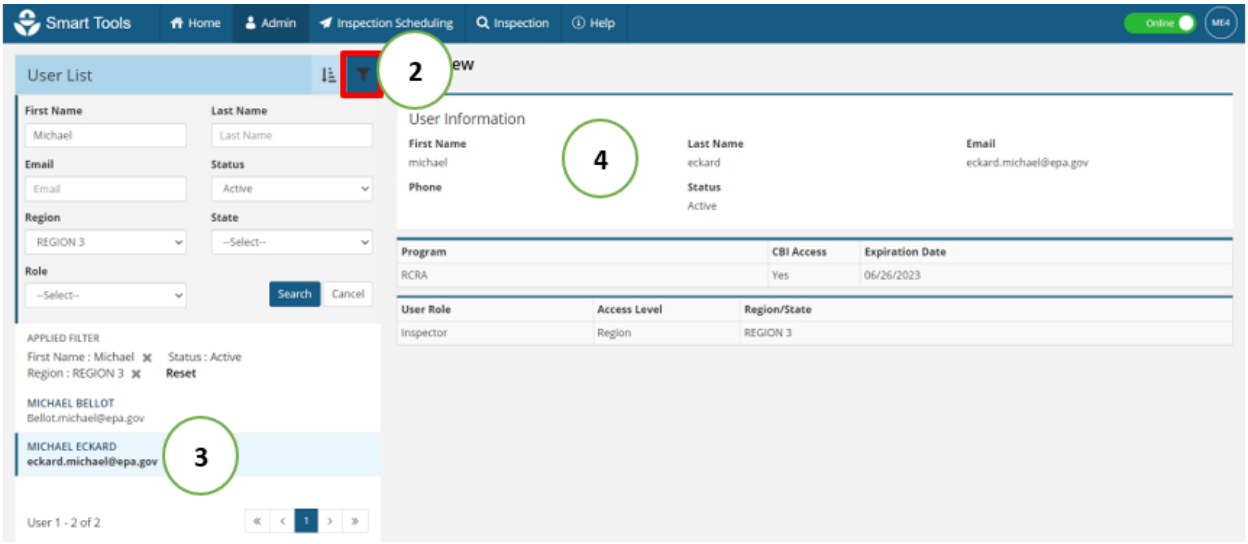
Each user has specific permissions and access levels which can be adjusted as needed by the user's Regional or State Smart Tools Administrator. Users can see their user roles, media, and CBI access. System Administrator details provided in the **Smart Tools System Administrator User Guide**

Steps:

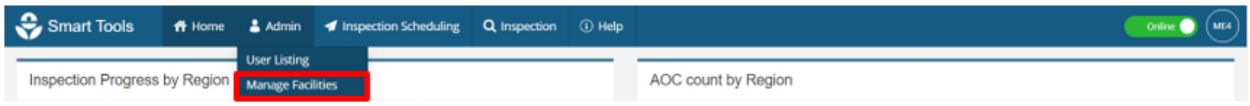
1. Click **User Listing**



2. Click **Filter** Icon. Fill in desired fields to narrow down results
3. Select user
4. View user information.



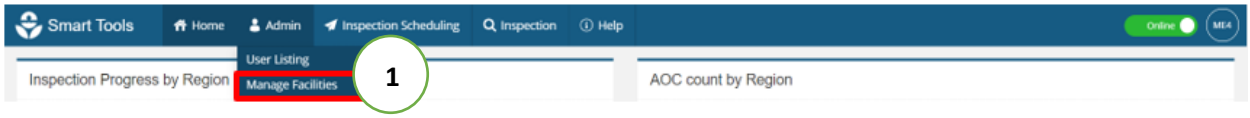
Manage Facilities



Finding Facility

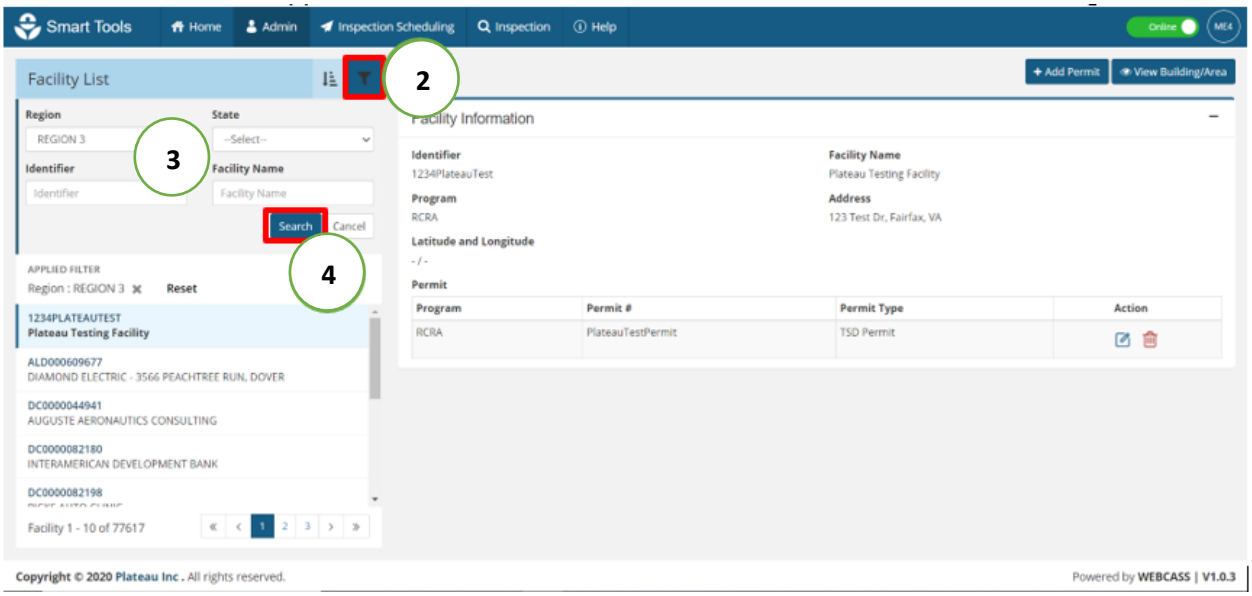
Steps:

1. Under Admin, Click **Manage Facilities**



2. Select **Filter** Icon
3. Use dropdowns to narrow down location and/or enter Facility Information in text fields
4. Click **Search.**

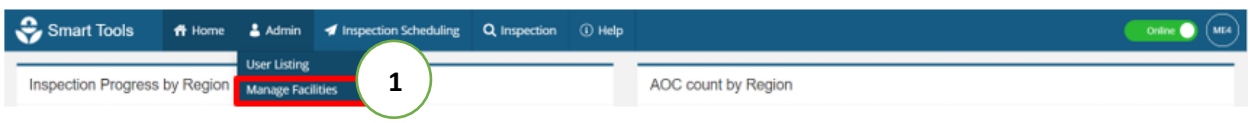
> **Note:** The Applied Filter will remain until it is reset, or the search criteria is changed



Add Permit

Steps:

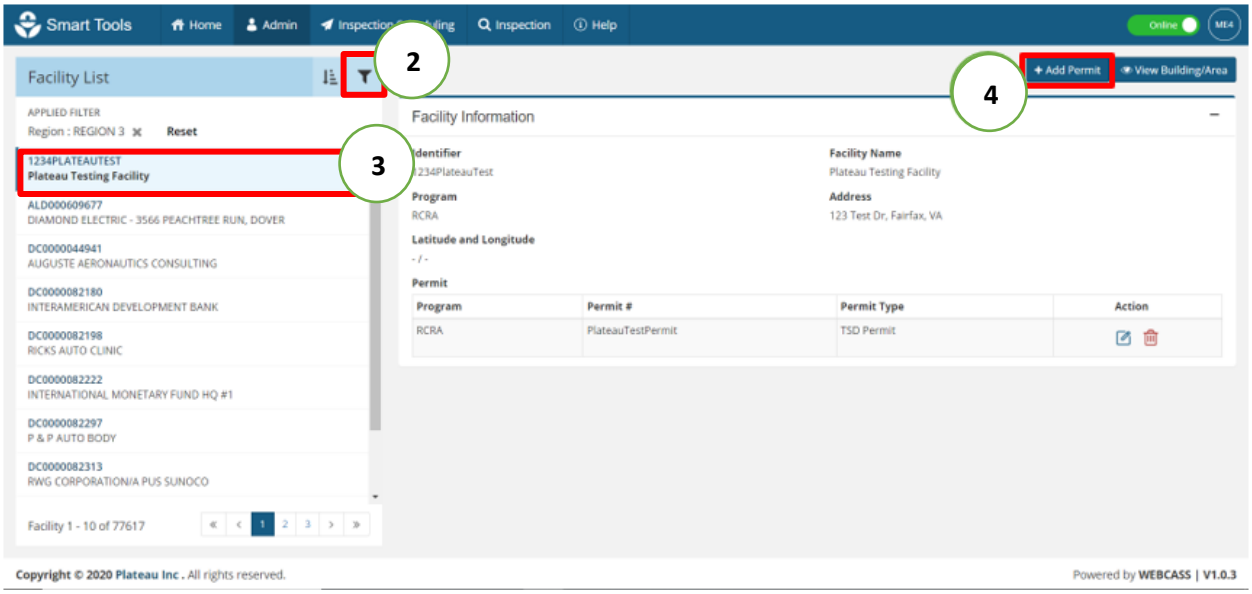
1. Under **Admin**, Click **Manage Facilities**



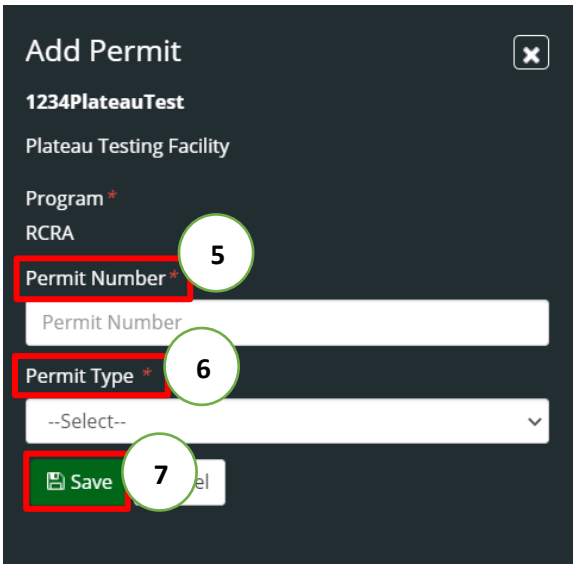
2. Locate the correct facility using **Filter**

Note: The Applied Filter will remain until it is reset, or the search criteria is changed

3. Select facility from list
4. Select **Add Permit**



5. Enter Permit Number
6. Enter Permit Type from dropdown
7. Click **Save**

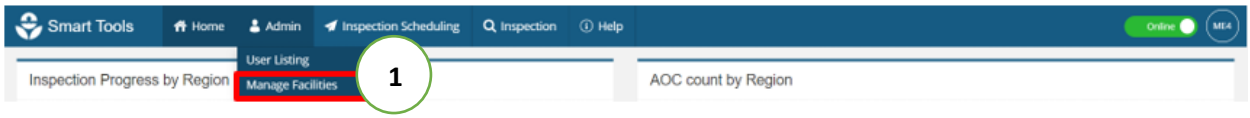


View Building/Area

Smart Tools enables users to create and associate Buildings and Areas with a specific facility so that observations can be written against specific locations. These Buildings and Areas can be used by any inspector that inspects the facility and are viewable in the Manage Facilities tab. Buildings and Areas are usually created during the site inspection. However, they can be created during pre-inspection if the information is contained in a previous inspection report. Inspectors should use the same naming convention as the facility so all parties will have a common understanding on the location of interest.

Steps:

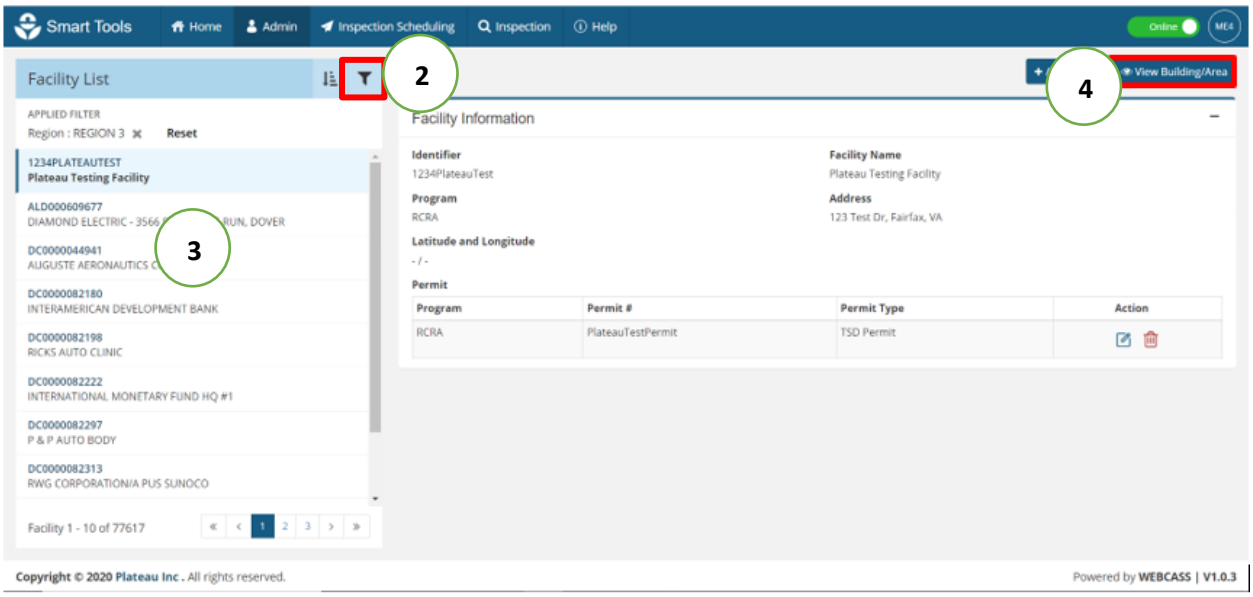
1. Under **Admin**, Click **Manage Facilities**

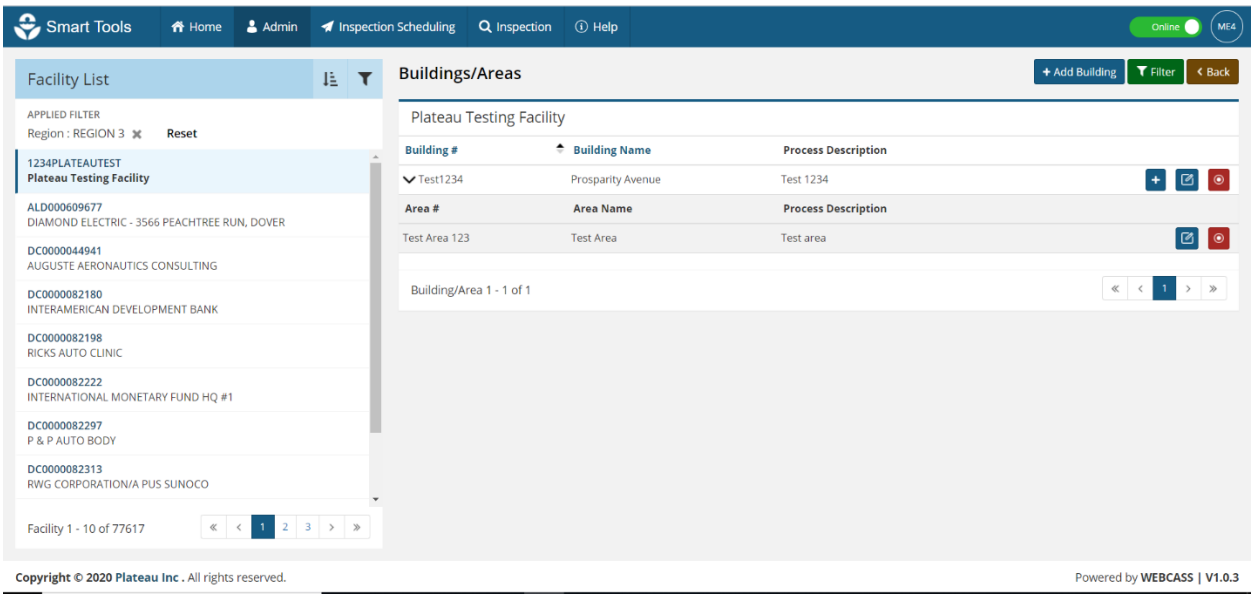


2. Locate the correct facility using **Filter**

> **Note:** The Applied Filter will remain until it is reset, or the search criteria is changed

3. Select facility from list
4. Click **View Building/Area**

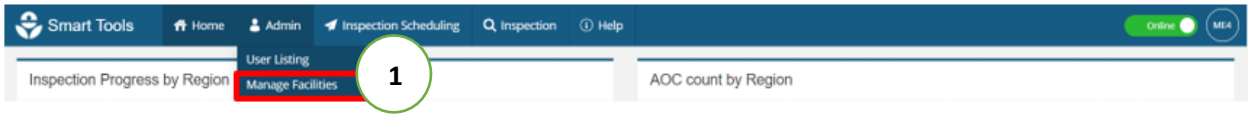




Add a Building

Steps:

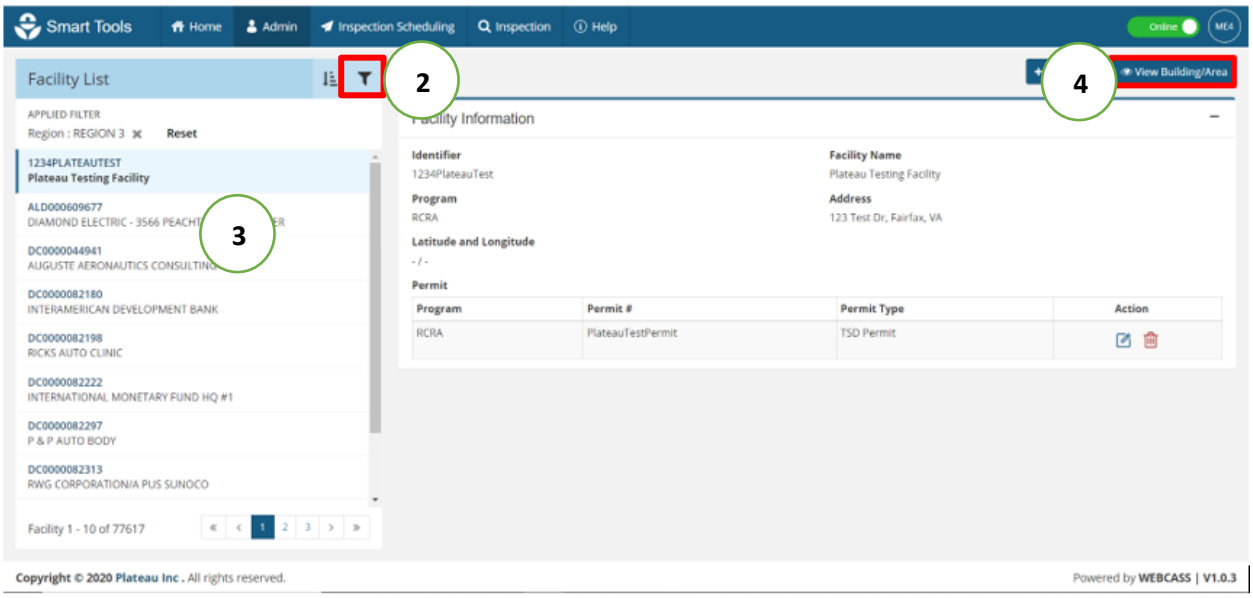
1. Under **Admin**, Click **Manage Facilities**



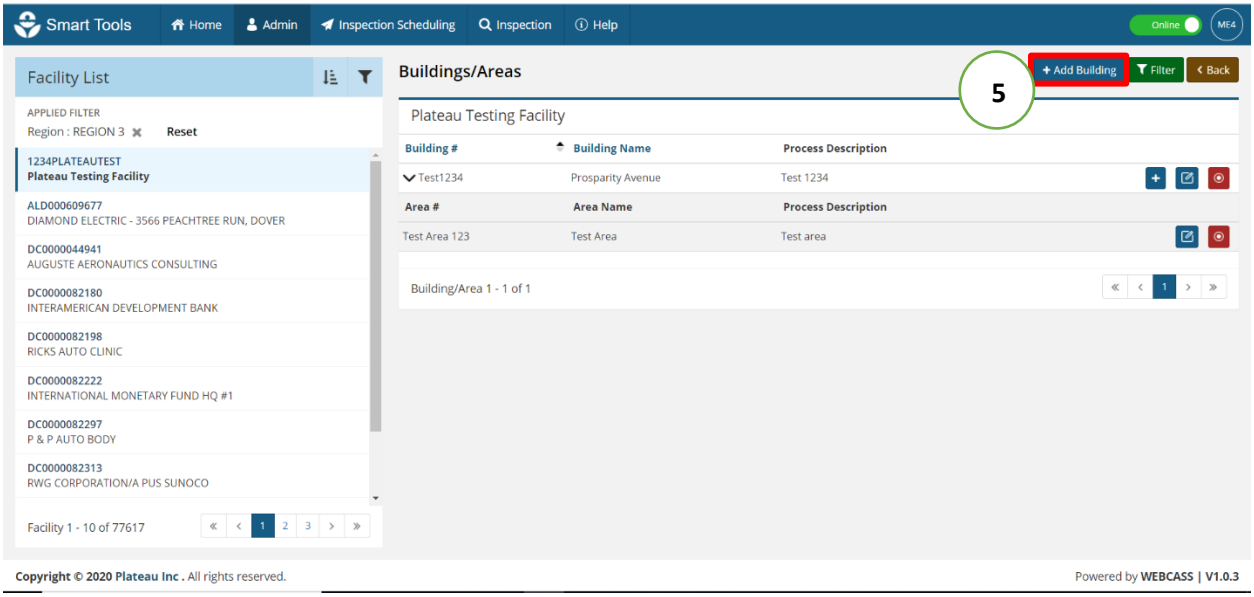
2. Locate the correct facility using **Filter**

> **Note:** The Applied Filter will remain until it is reset, or the search criteria is changed

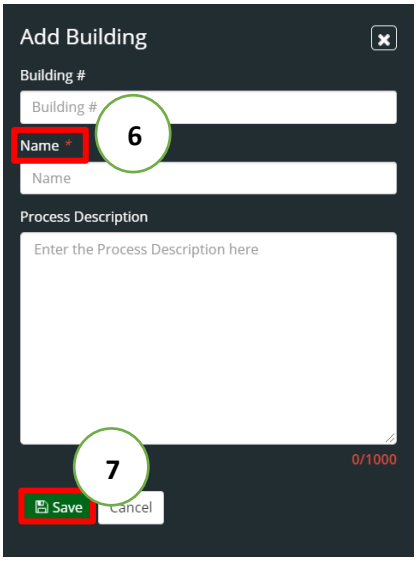
3. Select facility from list
4. Click **View Building/Area**



5. Click **Add Building**



6. Enter building information. **Name is a required field.**
7. Click **Save**

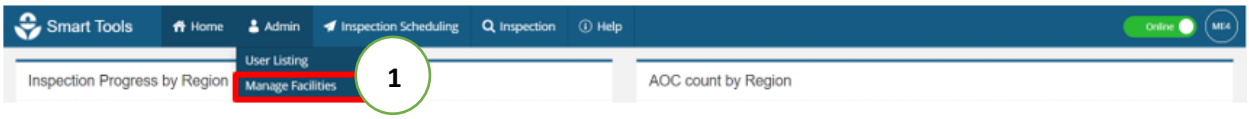


Note: For future inspections at the same facility, Buildings can be deactivated if they are no longer in operation at the facility by clicking **Inactivate Building** icon

Add Area

Steps:

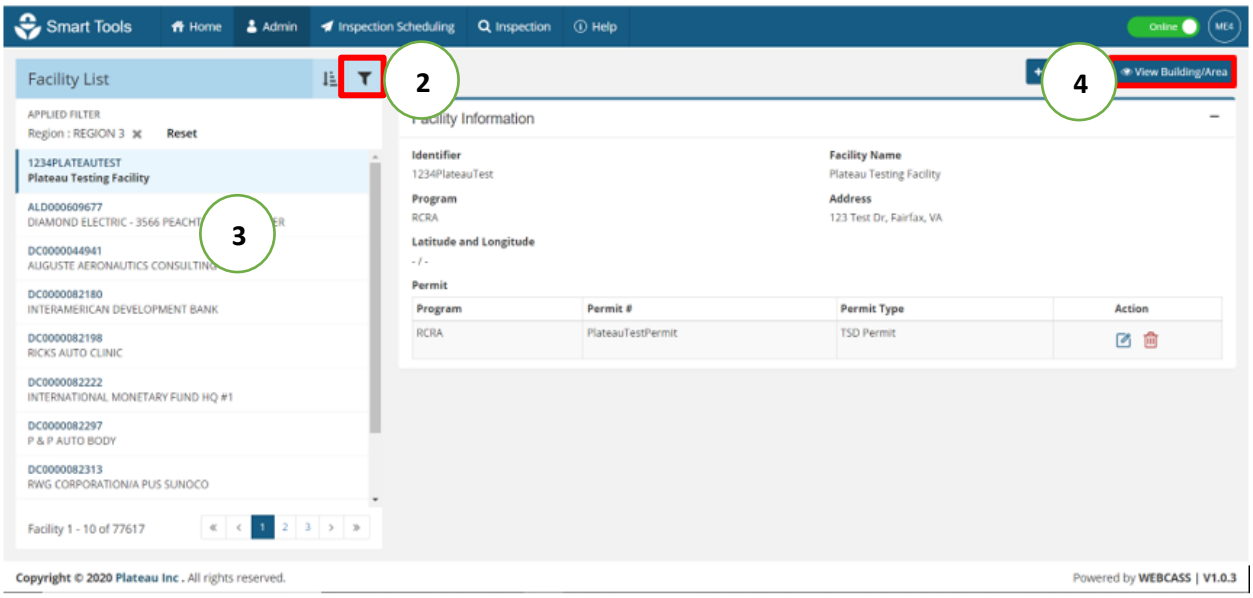
1. Under **Admin**, Click **Manage Facilities**



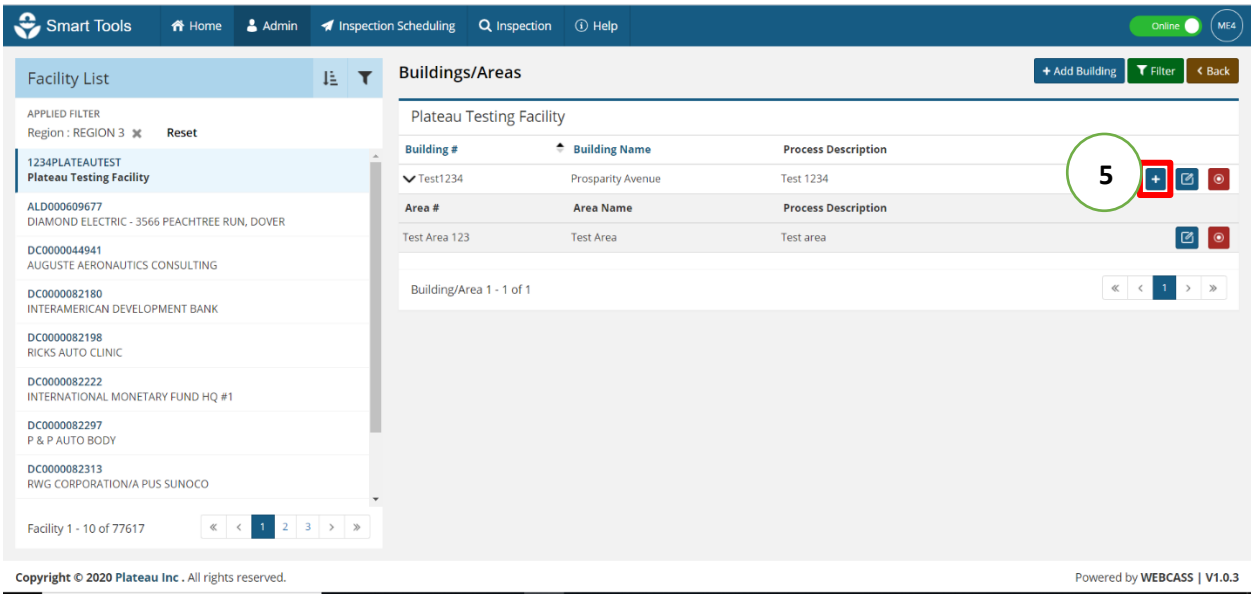
2. Locate the correct facility using **Filter**

Note: The Applied Filter will remain until it is reset, or the search criteria is changed

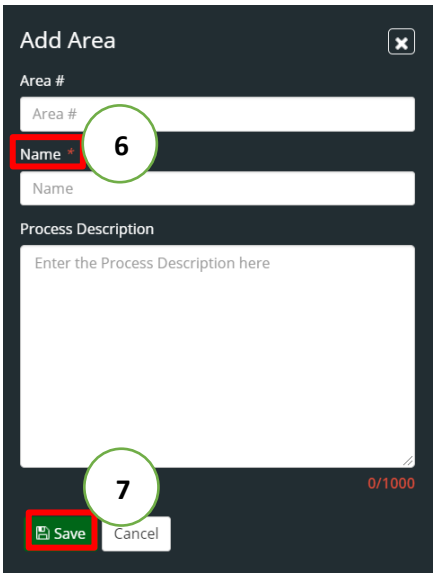
3. Select facility from list
4. Click **View Building/Area**



5. Click **Add Area**



6. Enter area information. At a minimum, **Name** must be entered
7. Click **Save**



Note: For future inspections at the same facility, Areas can be deactivated if they are no longer in operation at the facility by clicking the **Inactivate Area** icon

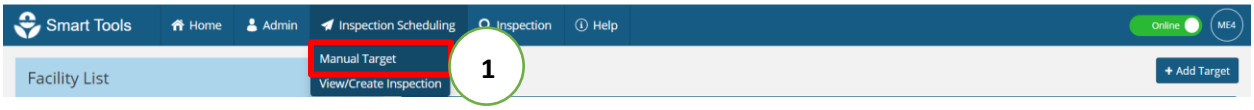
Inspection Scheduling

Manual Target

Users can search a facility within their state or region and schedule an inspection individually.

Steps:

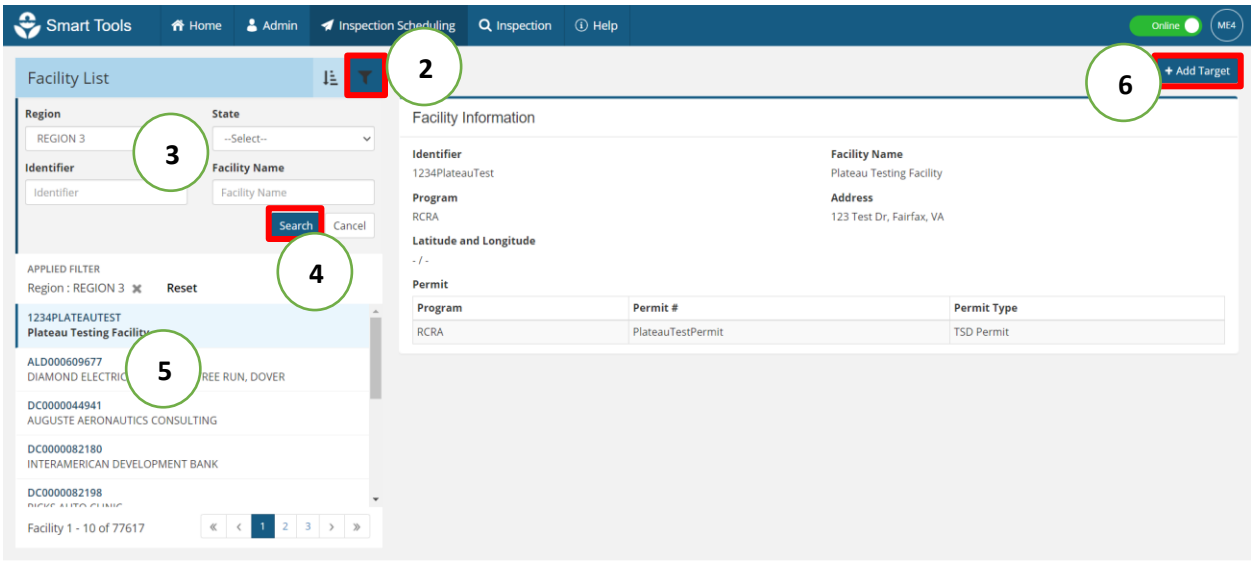
1. Under **Inspection Scheduling**, Click **Manual Target**



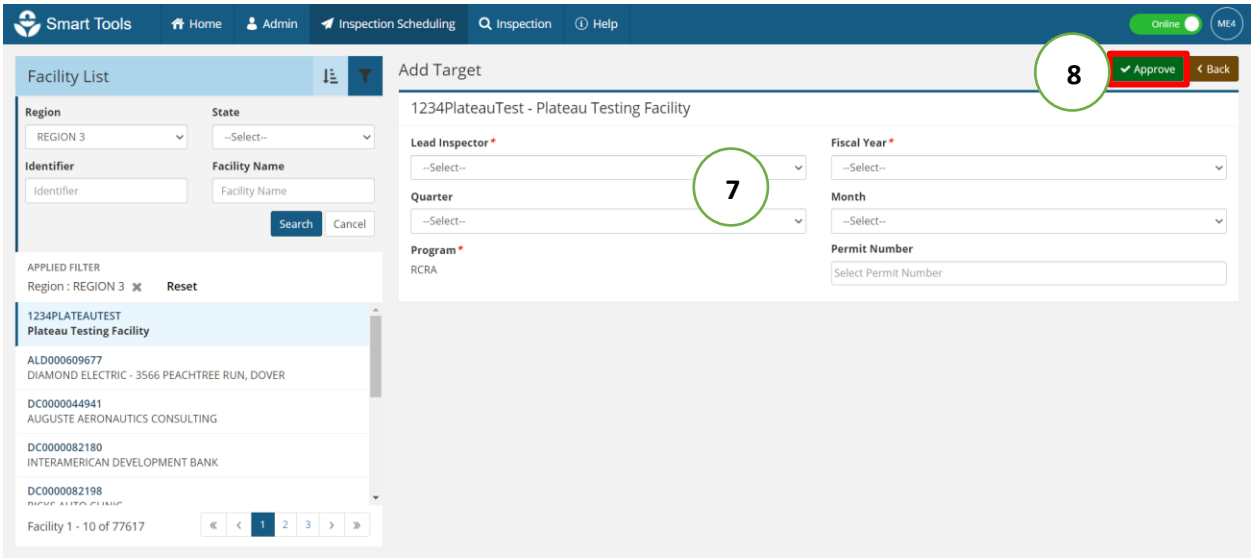
2. Click **Filter** icon

Note: The Applied Filter will remain until it is reset, or the search criteria is changed

3. Fill in search criteria
4. Click **Search**
5. **Select the desired Facility from the list of returned facilities**
6. Click **Add Target**



7. Using the drop downs, fill in information. **Lead Inspector** and **Fiscal Year are required fields.**
8. Click **Approve**



9. Popup will appear asking to confirm. Click **OK**

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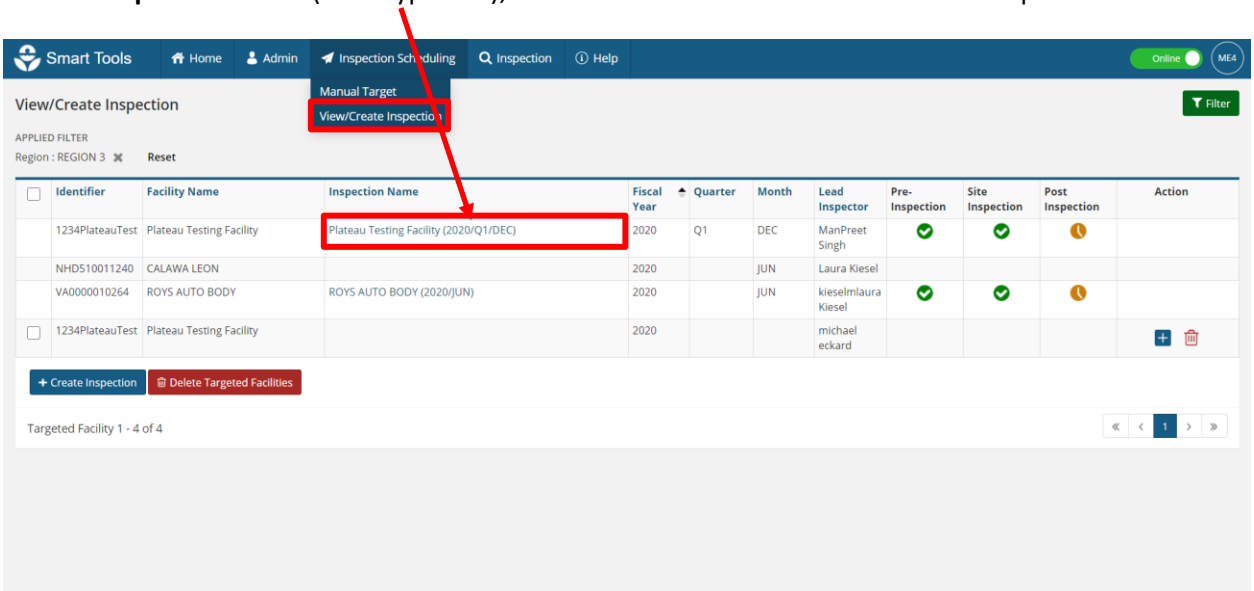
Note: Once approved, facilities are now available in the View/Create Inspection tab

View/Create Inspection

Dashboard Overview

This is a master list of all inspections, regardless of current phase (Targeted Facility, Pre-Inspection, Site-Inspection, Post-Inspection, Complete). The user can filter the list to find specific inspections and view important inspection information and its current status. By clicking on the **Inspection Name** (blue hyperlink), the user will be taken to that individual inspection.



Filtering Through Targeted Inspections

A user can filter the list of inspections to locate a specific inspection or inspections containing similar characteristics.

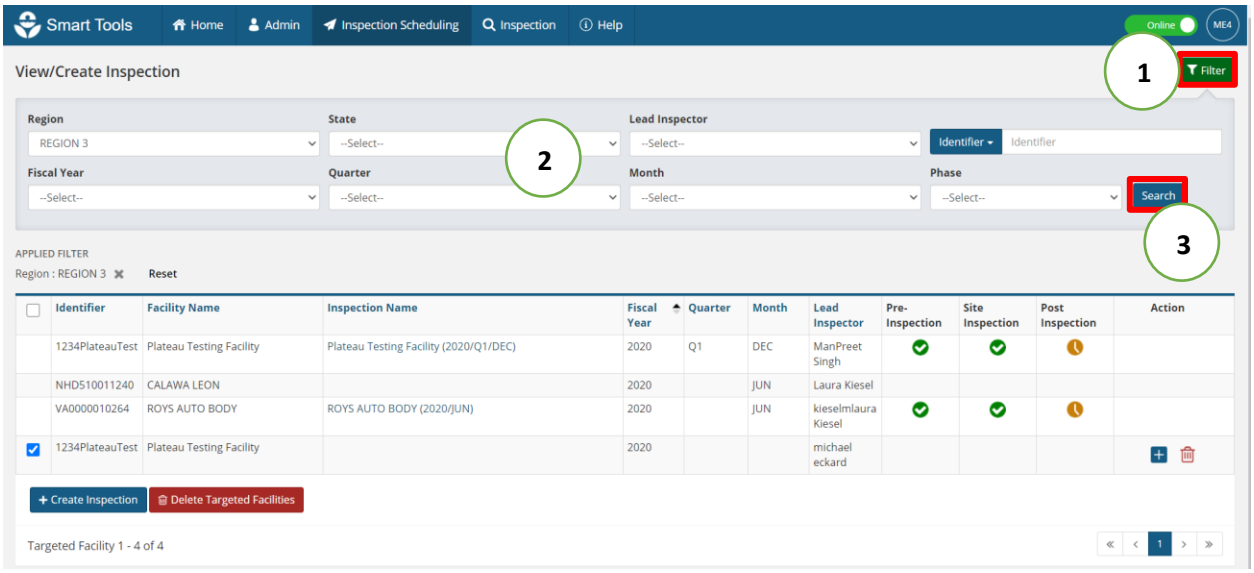
Steps:

1. Click **Filter** for the filter dropdown to appear

Note: The Applied Filter will remain until it is reset, or the search criteria is changed

2. Enter information into text boxes (partial searches work as well) or utilize the dropdowns
3. Click **Search**.

Note: The Applied filter will remain on this tab until manually removed or a new search is conducted. To manually remove a filter, select the **"X"** next to the applied filter or select **Reset**.

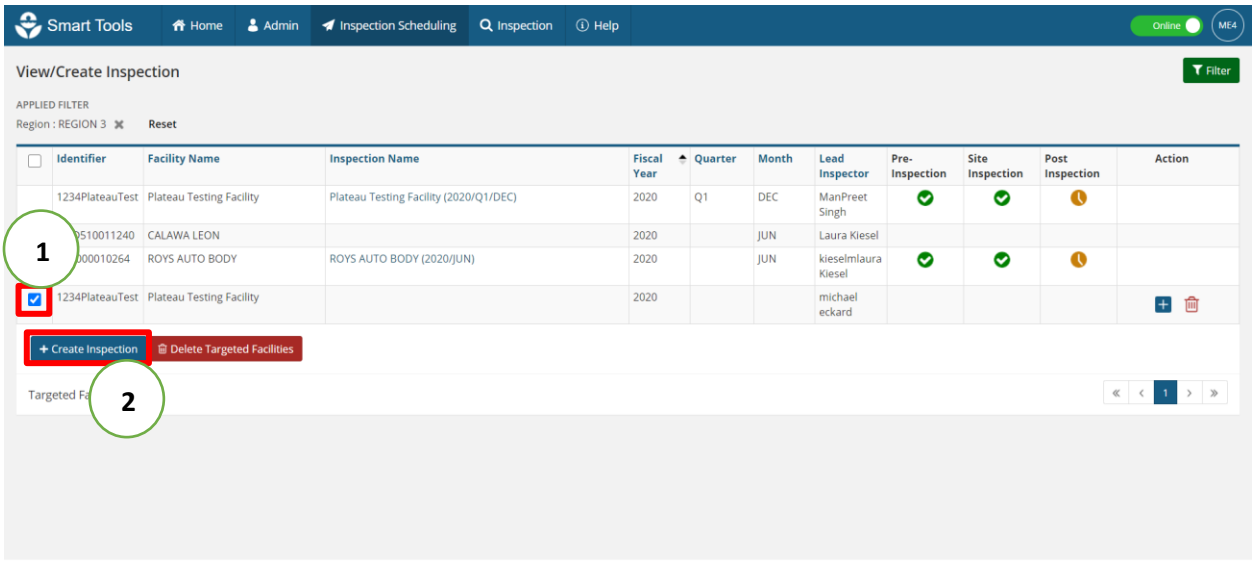


Creating an Inspection

While in the "Targeted Facility" process, an inspection has not yet been created and the dashboard will not have all the columns filled.

Steps:

1. In the checkbox, select which facility or facilities the user would like to create the inspection for. This can only be done for targeted facilities that the user is assigned as the Lead Inspector
2. Click **Create Inspection**



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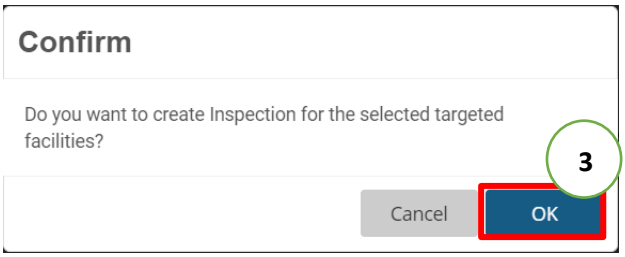
3. Popup will appear asking to confirm. Click **OK**

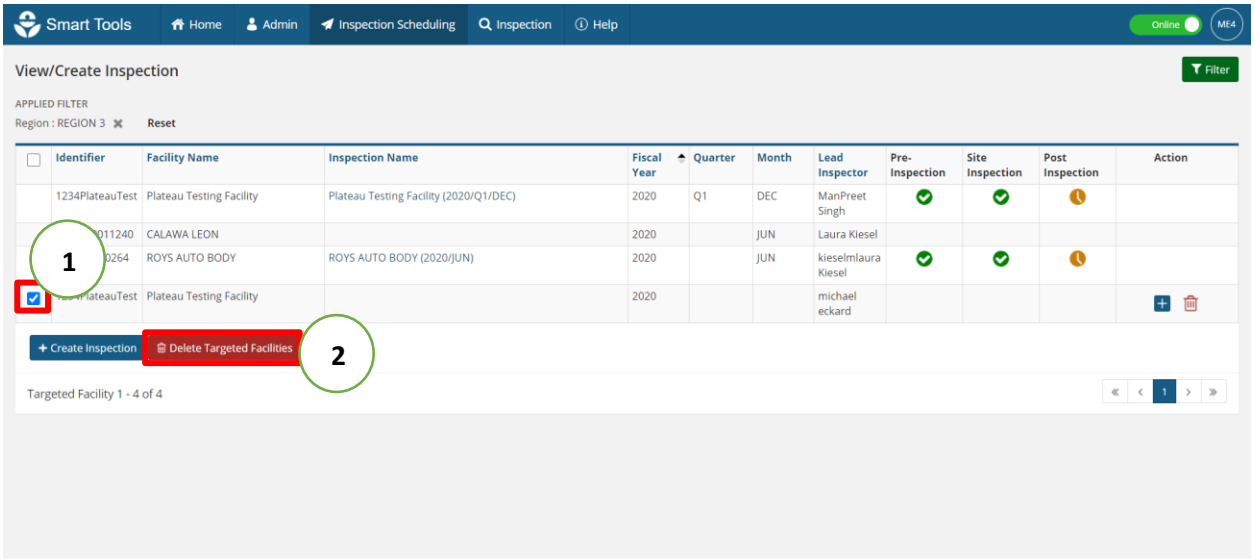


Deleting a Targeted Facility

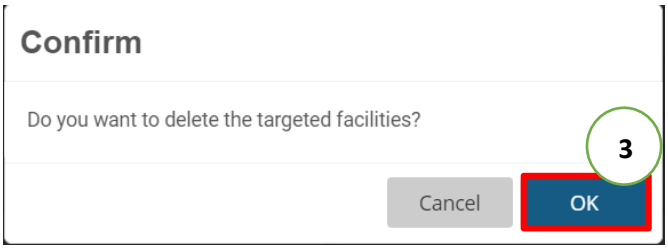
Targeted facilities can only be deleted from this list when they are still in the "Targeted Facility" phase.

Steps:

1. Inside the checkbox, select the targeted facility or facilities to be deleted from the View/Create Inspection dashboard
2. Select **Delete Targeted Facility**



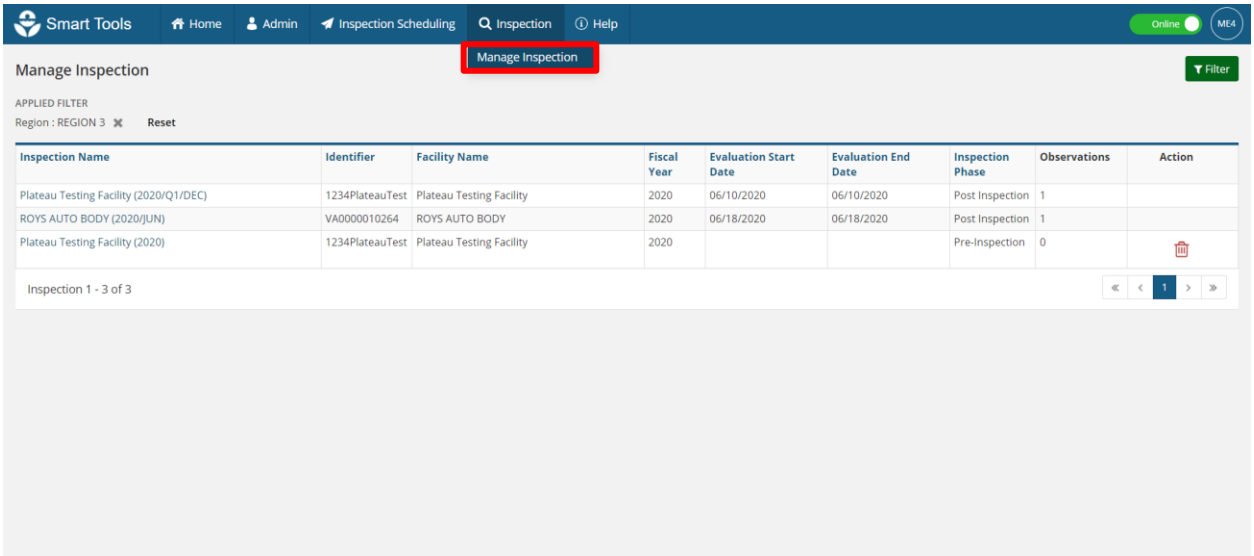
3. Popup will appear asking to confirm. Click **OK**.



Inspection Tab - Manage Inspection

Dashboard Overview

All inspections created in the View/Create Inspection page will be located in the Manage Inspection tab. Here, Lead Inspectors and Inspectors will be able to access an inspection to complete necessary work. An inspection can only be deleted when it does not have any observations attached to it as indicated by the red trashcan icon. On the dashboard, users can download and sync their inspections before and after going offline.



Completing the Pre-Inspection Process

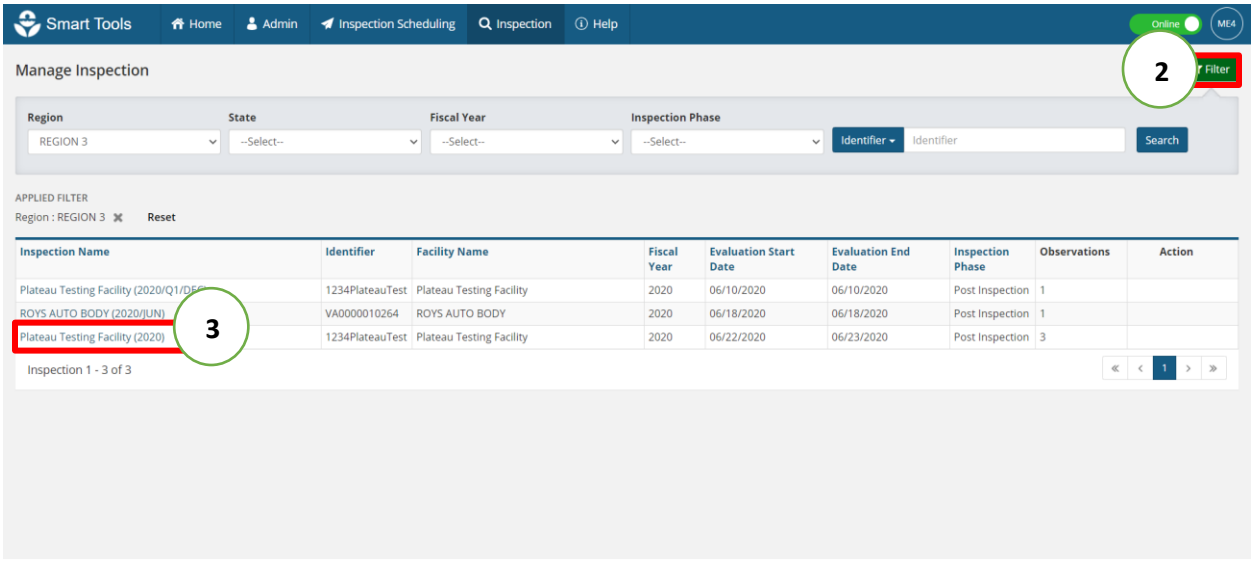
Steps:

1. Under Inspection, Click **Manage Inspection**

2. Find correct inspection using the **Filter**

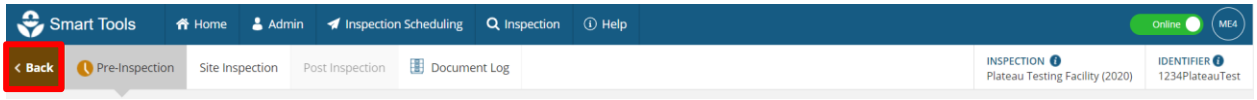
> **Note:** The Applied Filter will remain until it is reset, or the search criteria is changed

3. Select correct inspection by clicking the **Inspection Name** (blue hyperlink)



Back Button

Used to easily navigate as a shortcut through the levels of the inspection process.



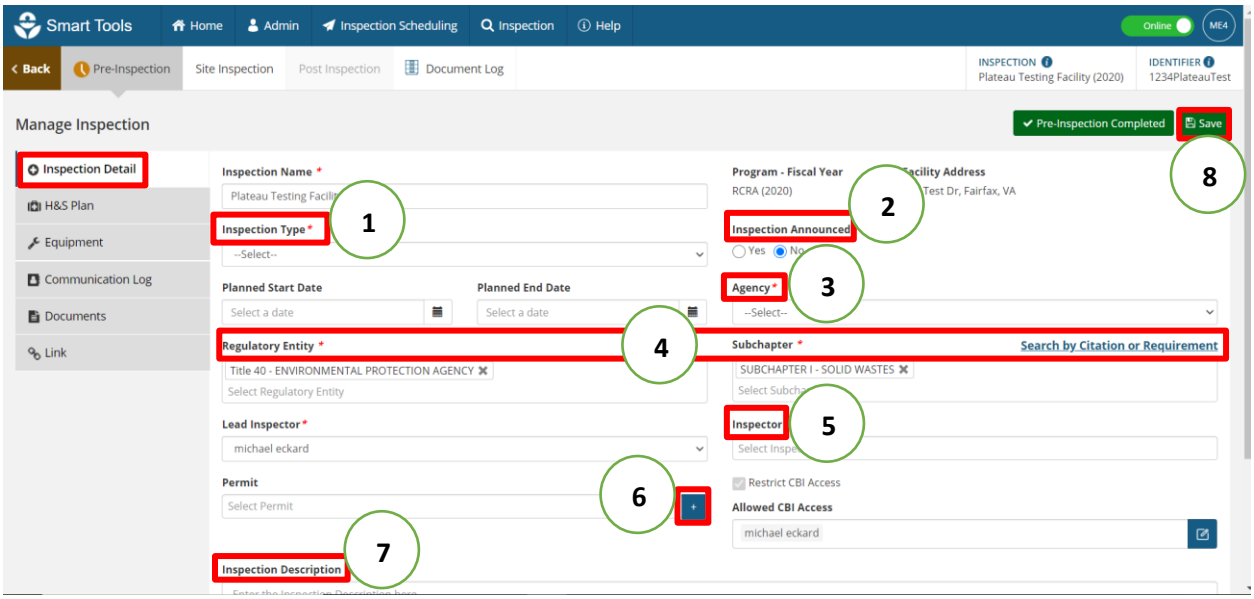
Inspection Detail

Most information will be pre-populated for the user based on the facilities location and the inspection's media (e.g., RCRA, CWA, CAA), but can be updated by the user.

Steps:

1. Select **Inspection Type** from dropdown
2. Identify whether inspection is Announced (Yes/No)
3. Select Lead Inspector's **Agency** from dropdown
4. Add or take away from preselected Regulatory Entity and Subchapter, if needed. These selections will be used to link Areas of Concern against citations later in the application
5. Add additional inspectors to this inspection, if needed. To find and select users, they must be existing users in Smart Tools. The textbox serves as a search field and names will populate in a dropdown menu
6. Add additional permits, if need ed
7. Add **Inspection Description** in the text box, if needed
8. Click **Save**

Note: Once complete with ALL Pre-Inspection activities, the user should **select "Pre-Inspection Completed"** to change the status of the inspection from Pre-Inspection to Site-Inspection. This will be reflected on all dashboards and the top of that particular inspection's screen. This does not affect the user's ability to edit Pre-Inspection information.

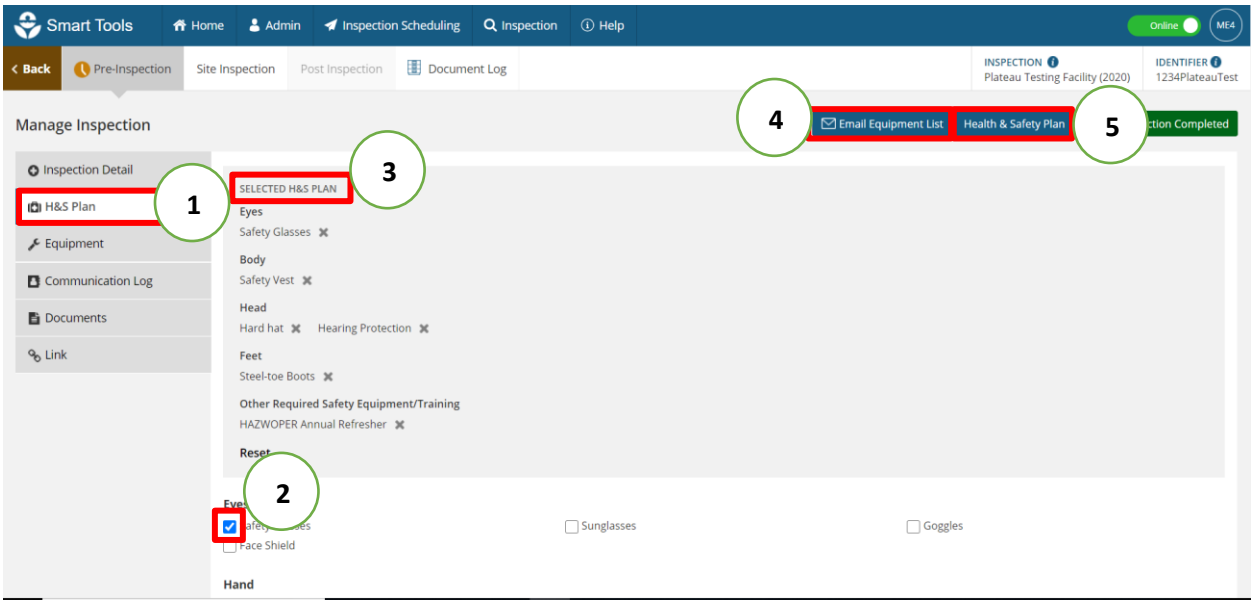


Health and Safety (H&S) Plan

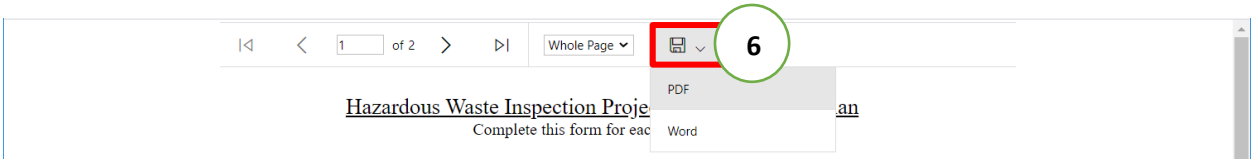
A Health and Safety Plan can be generated and modified after pre-populating information from the system. The H&S plan may be printed out, signed, and uploaded back into the system in the Documents tab (see below). Smart Tools will pre-populate some information, but Inspectors are required to fill in other portions of the H&S plan.

Steps:

1. Select **H&S Plan** from the Pre-Inspection activities tab
2. Click the checkbox next to required PPE (All PPE selected will begin to populate at top of list)
3. Check selected equipment for accuracy. Use the **X** next to the selected equipment to remove, if needed
4. Click **Email Equipment List** to send a copy of the equipment list to all participating Inspectors
5. Click **Health & Safety Plan**



6. Save **Health & Safety Plan** to device.

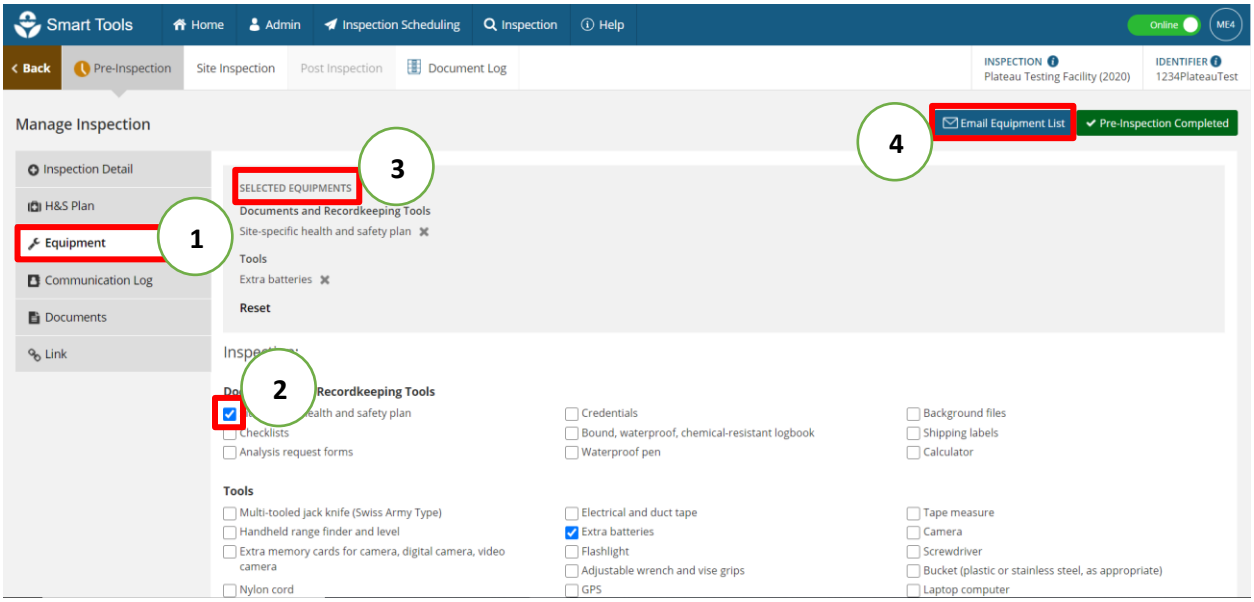


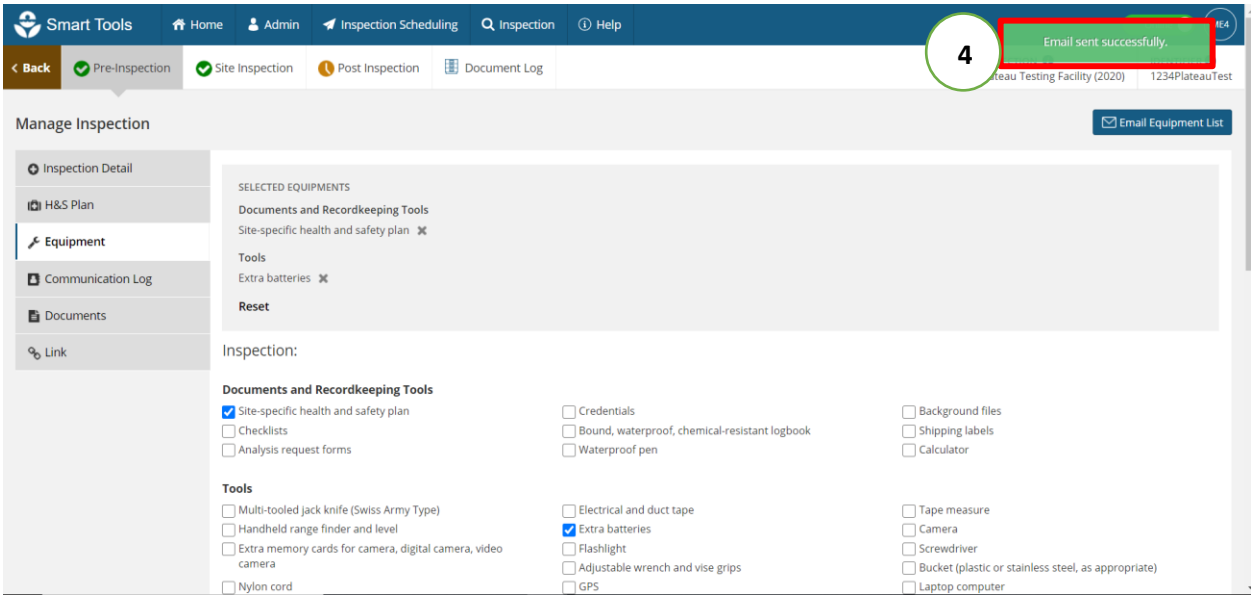
Equipment

Users can select all the general equipment (separate from the H&S Plan) that should be taken to the field. This list can be emailed to all inspectors involved in the inspection (this list is completed in the Inspection Details tab).

Steps:

1. Select **Equipment** from the **Pre-Inspection** activities tab
2. Click the checkbox next to required general equipment (All general equipment selected will begin to populate at top of list)
3. Check selected equipment for accuracy. Use the **X** next to the selected equipment to remove, if needed
4. Click **Email Equipment List** to send a copy of the equipment list to all participating Inspectors.





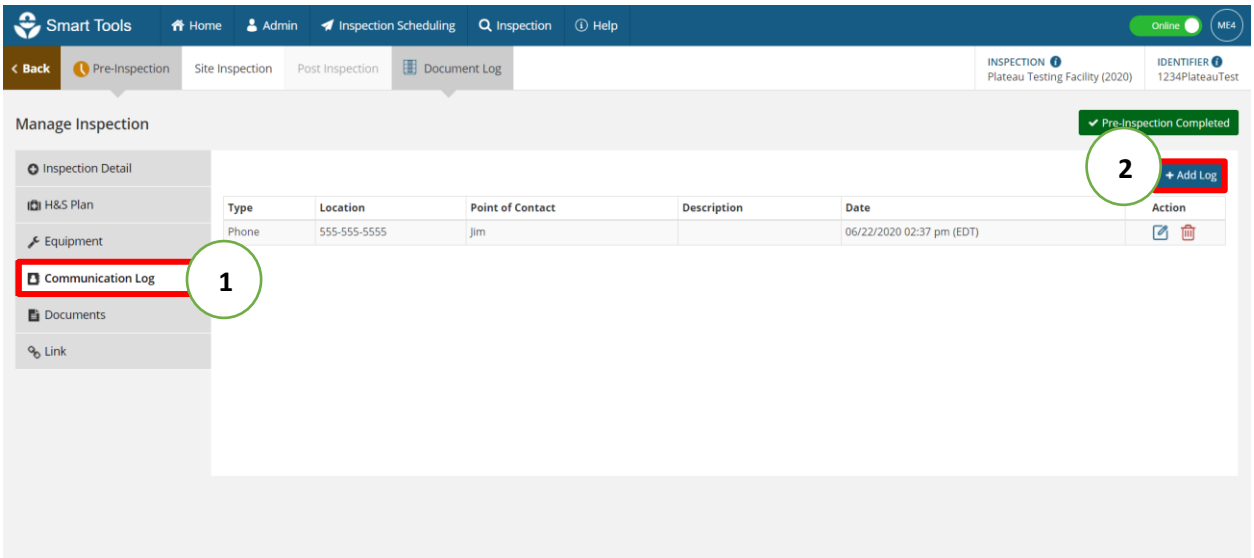
Communication Log

Users may log all communication prior to going into the field.

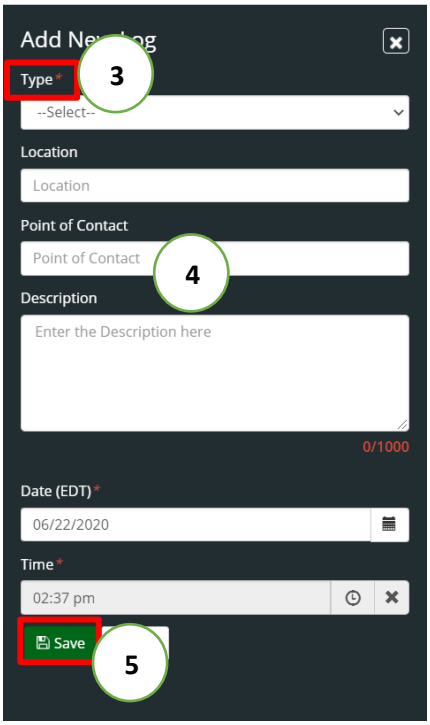
Steps:

1. Click **Communication Log** in the Pre-Inspection activities tab
2. Click **Add Log**

> **Note:** Users may update or delete entries on the dashboard using the following icons under the **Action** column



3. Select **Type** from the dropdown list (Date and Time are prepopulated but can be changed) Type is a required field.
4. If needed, add additional details
5. Click **Save**

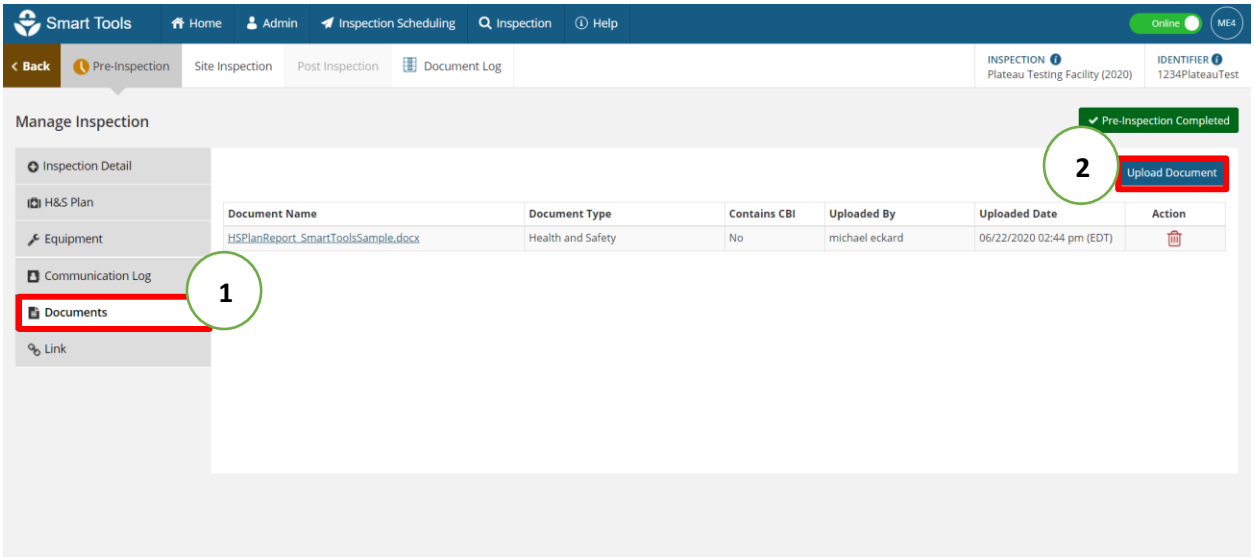


Documents

Prior to going into the field, documents relating to the inspection can be collected and stored in this tab for future use. In addition, inspectors can add documents collected while in the field or after the inspection.

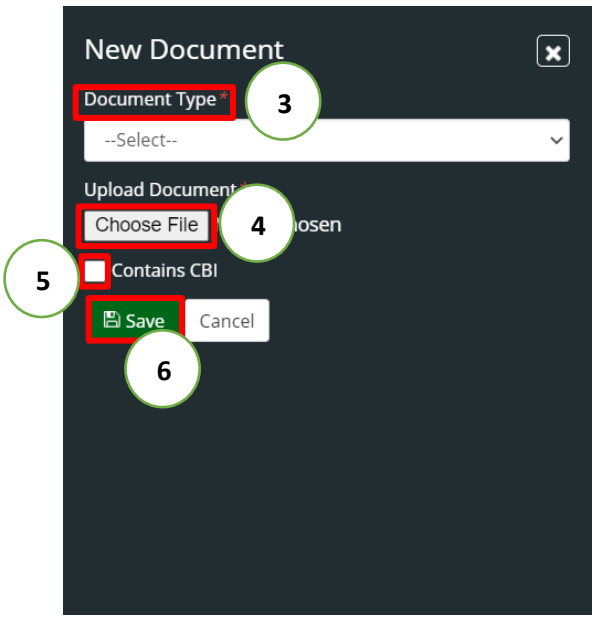
Steps:

1. Select **Documents** in the Pre-Inspection activities tab
2. Click **Upload Document**



Note: Users may delete any uploaded document using the **Delete** icon

3. Select **Document Type** from the dropdown list
4. Click **Choose File** and find the correct file from the device
5. If needed, click **Contains CBI** to protect the document from Smart Tools users without proper CBI clearance from viewing the document
6. Click **Save**

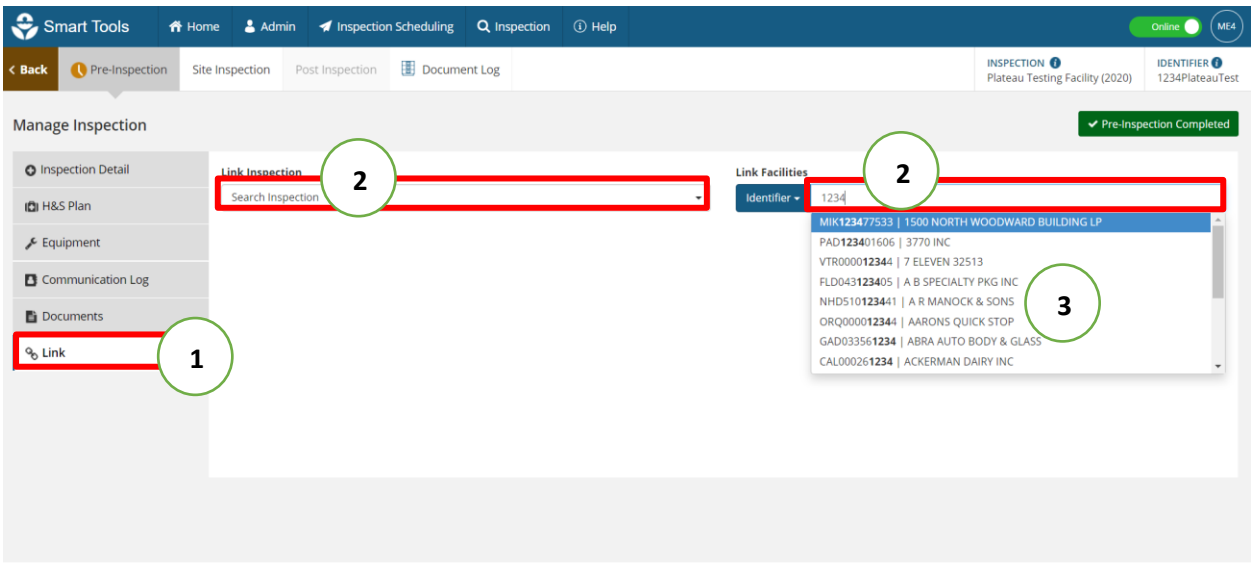


Linking This Inspection to Another Facility or Prior Inspection

The current inspection may have a relationship to a prior inspection, such as a follow up, that the user would like to link for future reference. The facility being inspected may also have a business relationship with another facility that should be tracked in the system.

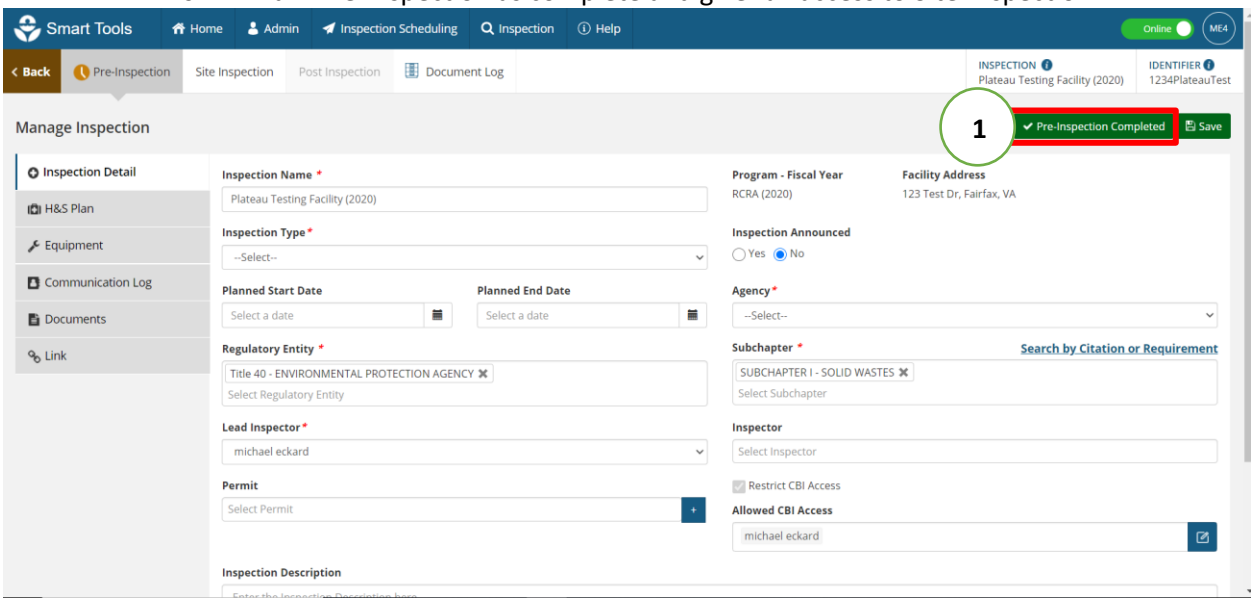
Steps:

1. Select **Link** in the Pre-Inspection activities tab
2. Use the searchable text fields. As the user inputs text, the field will begin narrowing down search results in a dropdown. This allows a user to search using partial text
3. Select the correct Inspection or Facility from the dropdown field. To remove, select the **X** next to Inspection or Facility that was previously selected

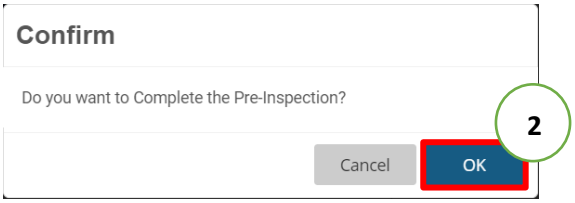


Pre-Inspection Completed

1. Click **Pre-Inspection Completed**. This can be done at any time during the Pre-Inspection. This will mark Pre-Inspection as complete and give full access to Site-Inspection



2. Popup will ask to confirm. Click **OK**



Downloading an Inspection Before Going into the Field

Prior to going out into the field and going into offline mode, the user will need to download the inspection. This will keep the inspection stored locally and allow the user to go into offline mode (see below).

Note: If there are multiple inspectors, all inspectors must download the same inspection. Once back online, users will be able to sync data back to the server.

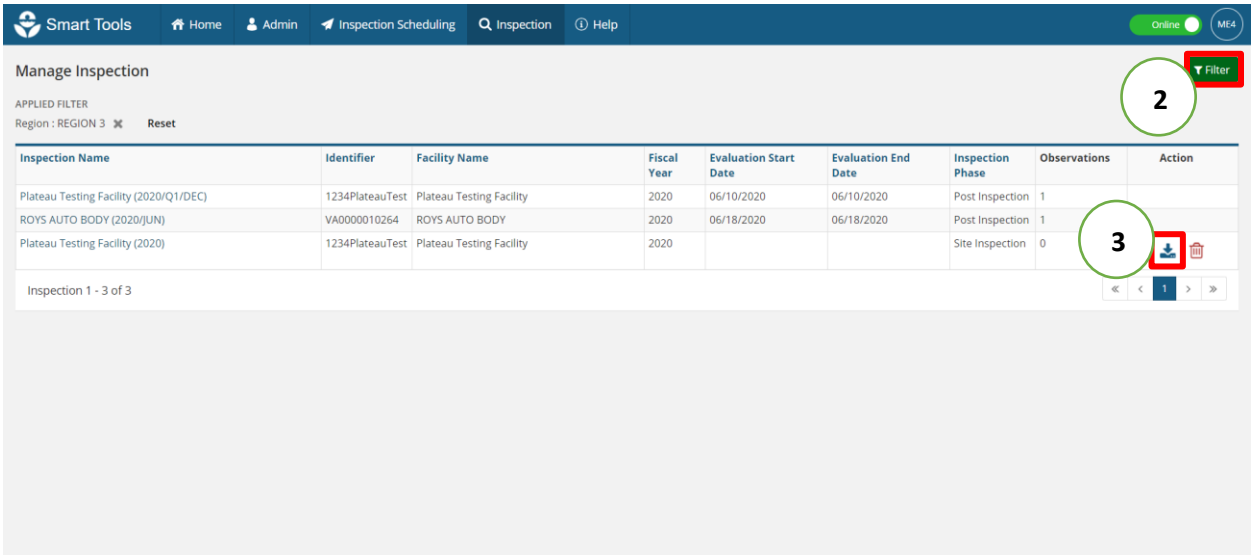
Steps:

1. Under Inspection, Click **Manage Inspection**

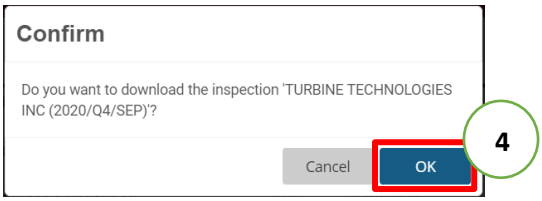
2. Find correct inspection for download. Click on **Filter** for assistance locating inspection.

Note: The Applied Filter will remain until it is reset, or the search criteria is changed

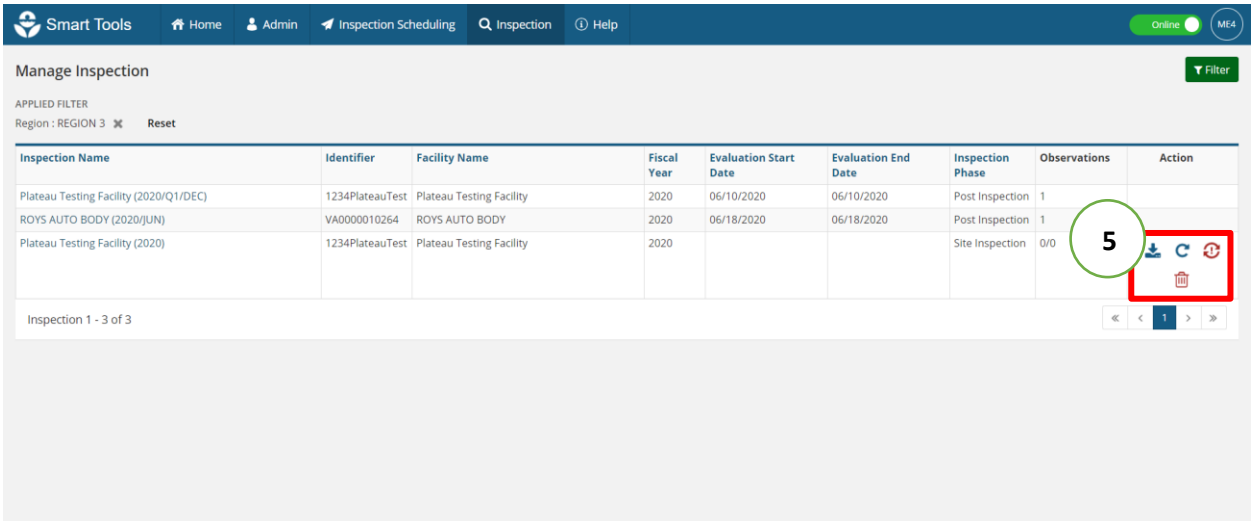
3. Under the Action column, select the **Download** icon



4. Popup will ask to Confirm. Select **OK**



5. On the **Manage Inspection screen**, check to make sure Inspection is downloaded. Four (4) icons should now be visible under the **Action** column.



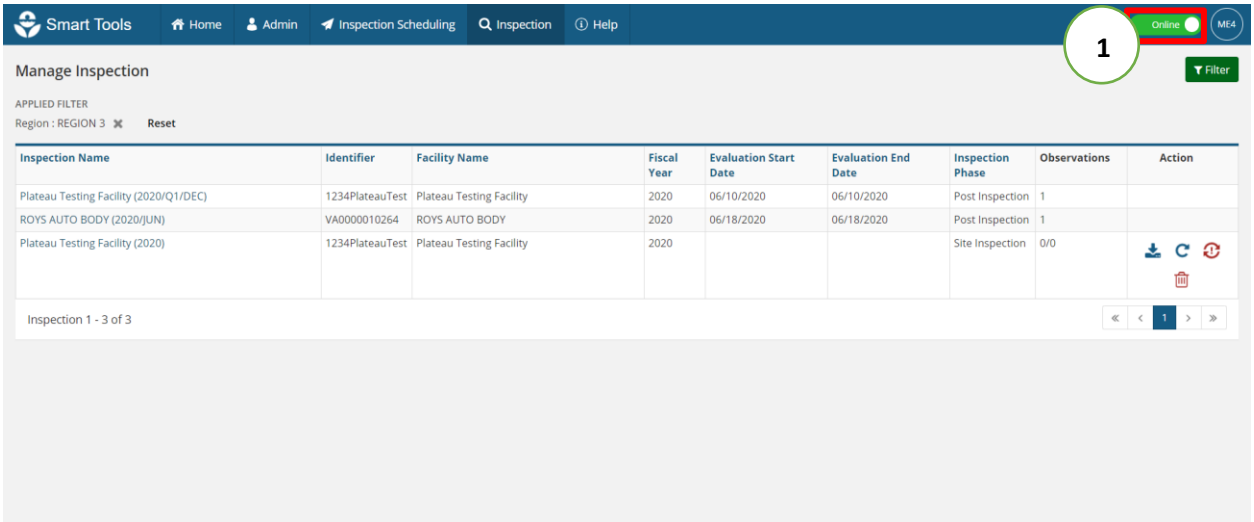
Going Offline

Users may conduct inspections with spotty and/or non-existent internet connection. This will require the user to **pre-emptively** go offline after downloading the inspection to the device. This will keep a user from losing any unsaved data if connectivity is lost.

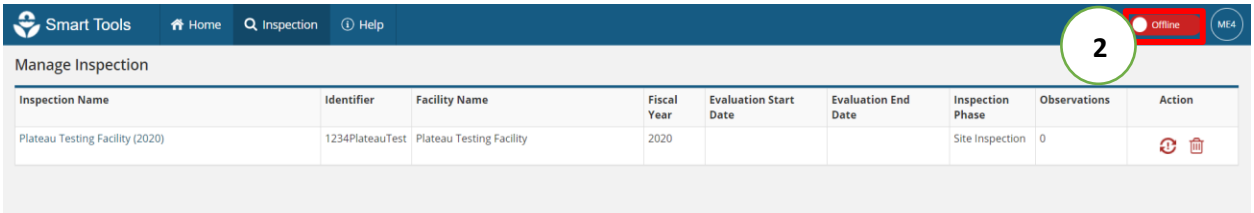
> **Note:** Once the inspection is downloaded, it is safe for the user to close the browser and turn off the device. A user can then open their Google Chrome browser, navigate to Smart Tools, and the information stored locally will be available.

Steps:

1. Click on **Online** button



2. Verify Smart Tools is **Offline**



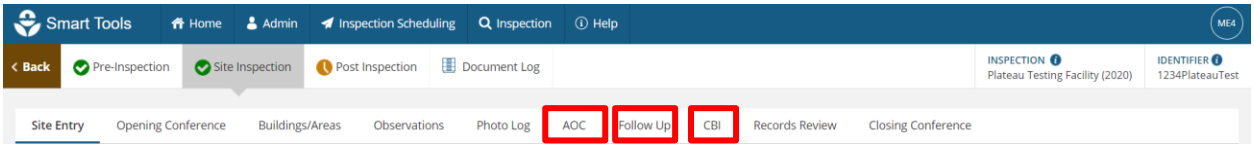
Note: Once in offline mode, some features will no longer be available or visible until back online.

Conducting an Inspection

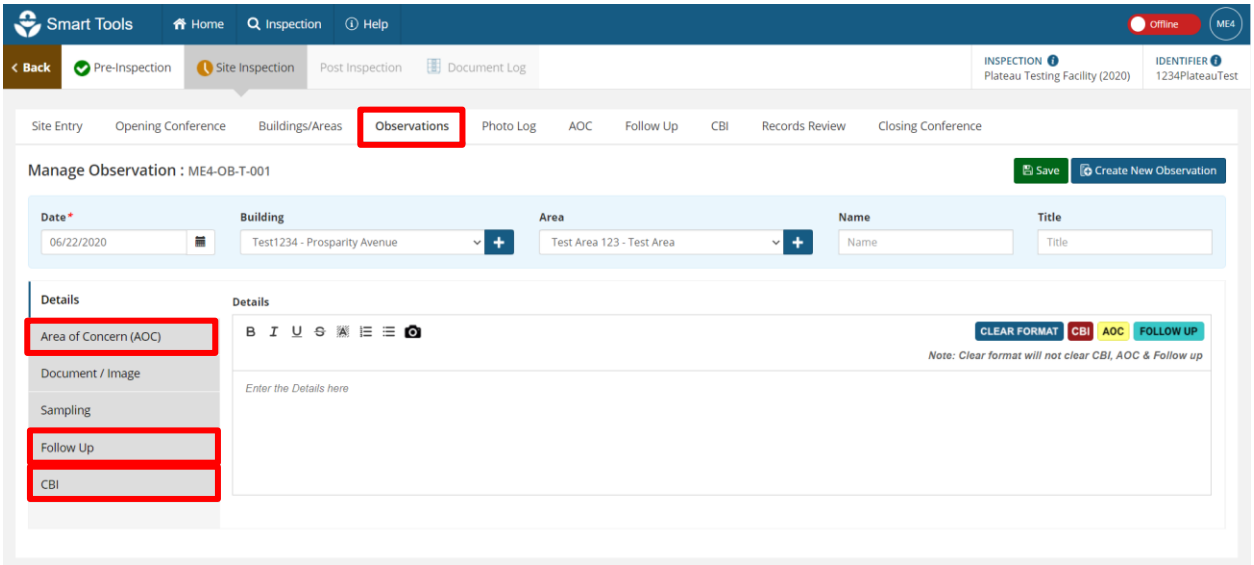
When conducting an inspection, always ensure to **Save** the data after each entry. There are **Save** buttons on every screen, and Smart Tools will prompt a user to save if they are navigating away from a tab with unsaved information.

Organizing Data

Throughout Site-Inspection, Smart Tools enables users to organize their data into three distinct categories; **Confidential Business Information (CBI)**, **Area of Concern (AOC)**, or **Follow Up**. This information will populate in the appropriate tabs at the inspection level in a consolidated list for easy access and reading.



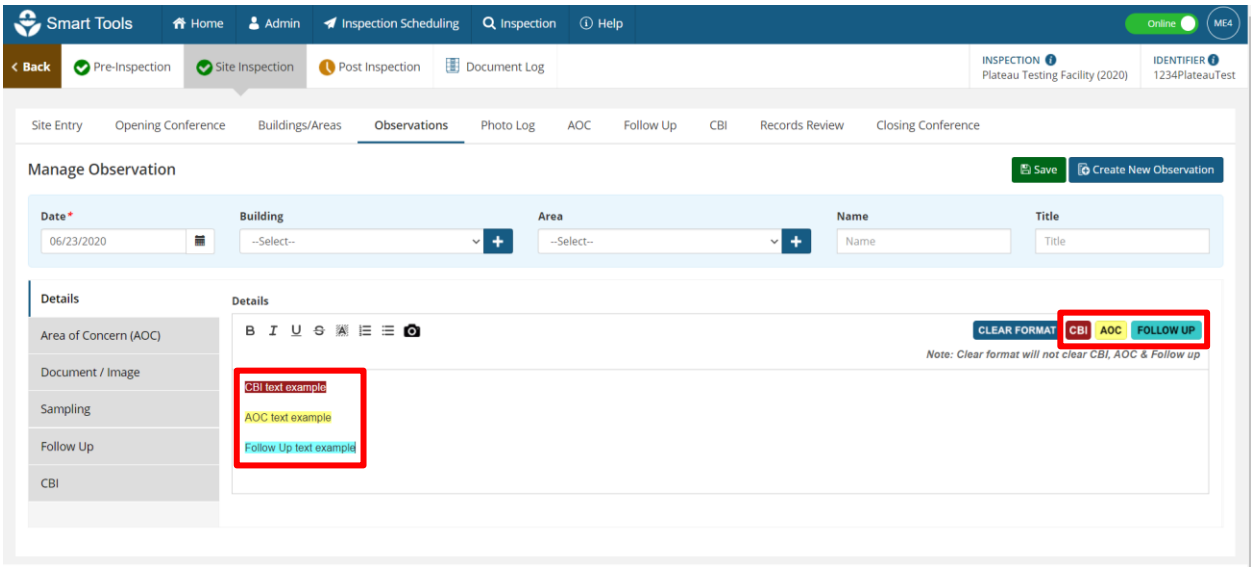
If identified in an observation, the data will also reside in its appropriate tab at the observation level.



Highlighting and Marking Text

In each textbox, users can highlight and identify information as one or more of these three categories at the press of a button: **CBI, AOC**, or **Follow Up**. For additional information on Highlighting Tips and Tricks, view the **Hardware & Touch Keypad Tips and Tricks** Section. Once text is highlighted, use one of the following buttons to categorize the text:

CBI AOC FOLLOW UP



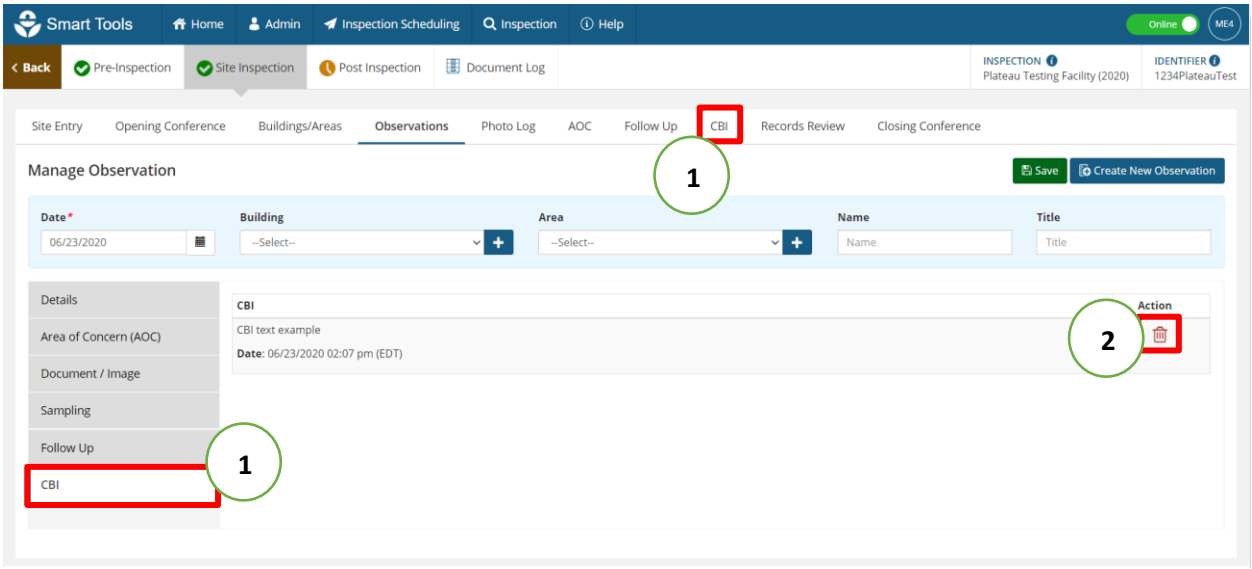
Note: Smart Tools enables users to protect Confidential Business Information (CBI) from unauthorized disclosure to non-CBI clearance holding users. **Users that do not have CBI access will not be able to see CBI data or use any CBI functionality.** The ability to capture and mark CBI in Smart Tools will be established in the user's settings for each user. This prevents unauthorized users, based on their CBI clearance, from seeing data marked as CBI.

Unlinking Marked Text

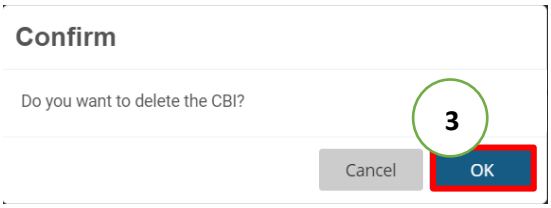
If, at any point, text no longer needs to be given a designated category, the user can unlink this text. The process is the same for all three (3) categories.

Steps:

1. Navigate to appropriate tab (**CBI, AOC, Follow Up**). This can be done at either the inspection level or the observation level, and the changes will be reflected in both tabs.
2. Click on the **Delete** button under the Action column. This delete refers to deleting the categorization of the information, not the notes themselves.



3. Confirmation popup will appear. Click **OK.**



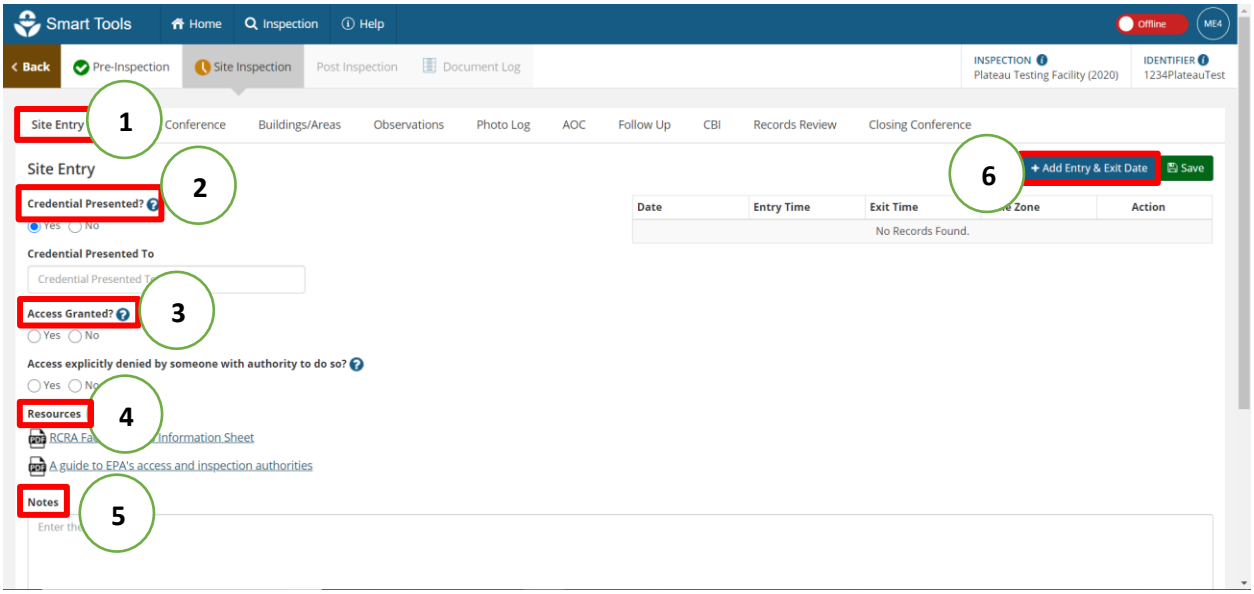
Site Entry

The user may capture information while entering the facility.

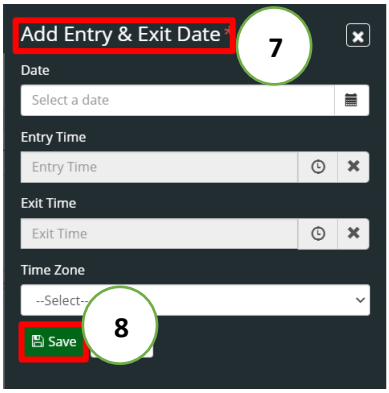
> **Note:** Only the Lead Inspector will be able to input data relating to the three canned questions. All participating inspectors will be able to input notes.

Steps:

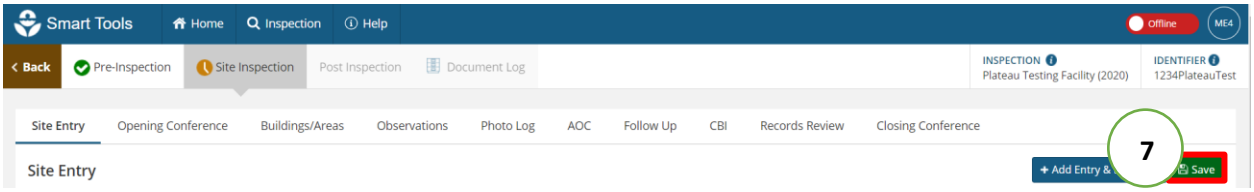
1. Select **Site Entry** from Site Inspection page
2. Select whether Inspector Credentials were presented **(Yes/No)**. If yes, input the name to whom the credentials were presented
3. Select whether **Access Granted** (Yes/No). If no, identify below if denied by someone with authority to do so
4. If access is denied, look to the **Resources** for additional guidance
5. Input notes in **Notes** section
6. Click **Add Entry & Exit Date** to input entry date and time. Smart Tools enables users to put in as many dates and times as needed for multiday inspections



7. Add **Entry Date and Time**
8. Click **Save**



9. Click **Save** in the Site-Entry tab.



Opening Conference

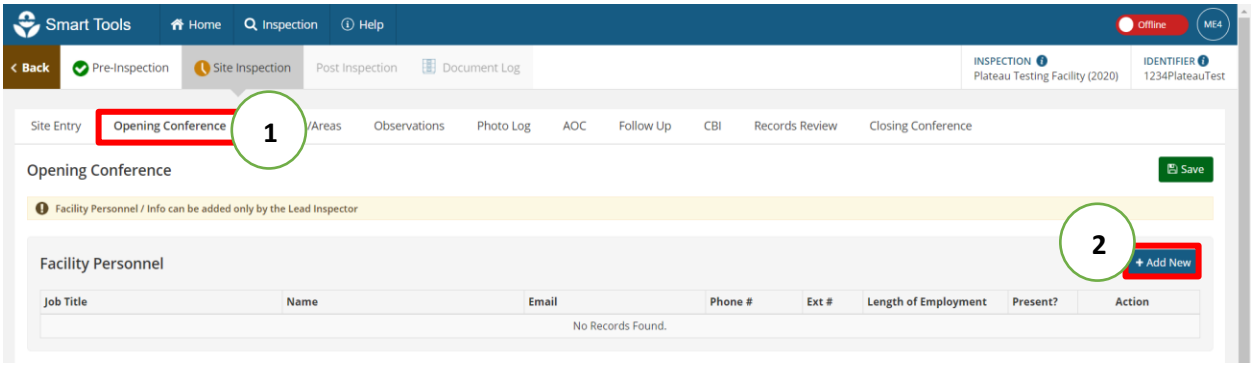
Facility Personnel (Only Lead Inspector can add) enables users to identify all facility personnel that participated during the Opening Conference. This list carries over to the Closing Conference for ease of reference.

> **Note:** If an individual is deleted from either the Opening Conference list or the Closing Conference list, it will reflect the deletion in both lists. Utilize the **Present** column to note which conference the individual attended.

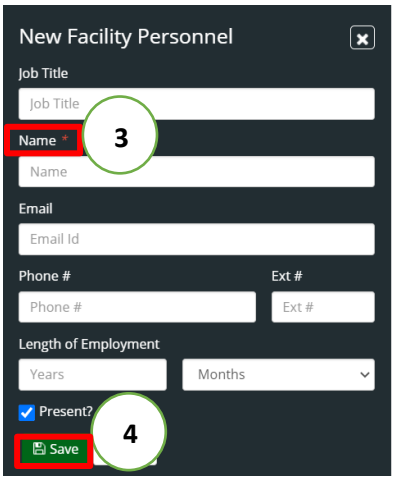
Facility Personnel

Steps:

1. Select **Opening Conference** in **Site-Inspection**
2. Click **Add New**



3. Input facility personnel information. **Name** is the only required field. To save time, an inspector can collect all the business cards and enter the information later
4. Click **Save**

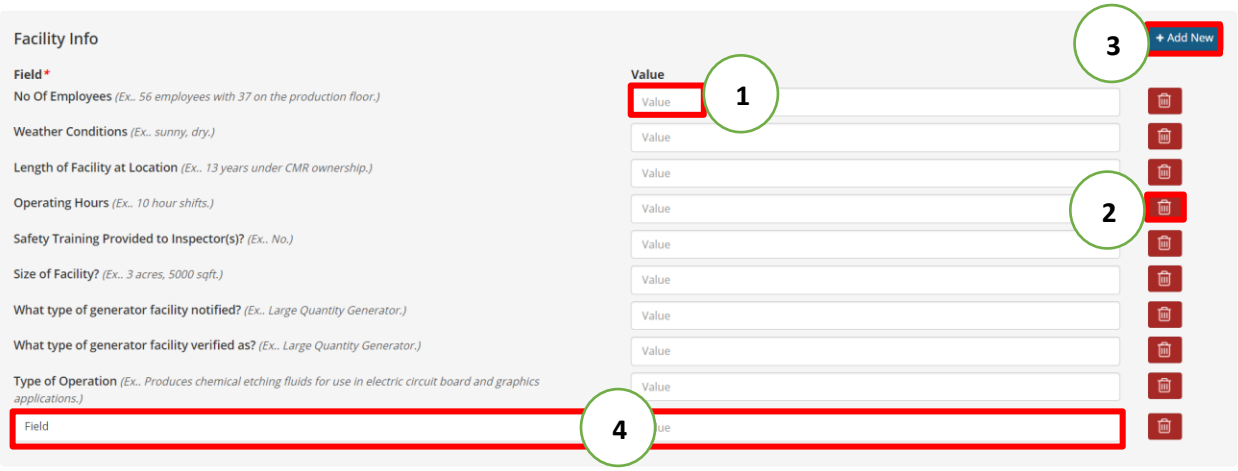


Facility Info

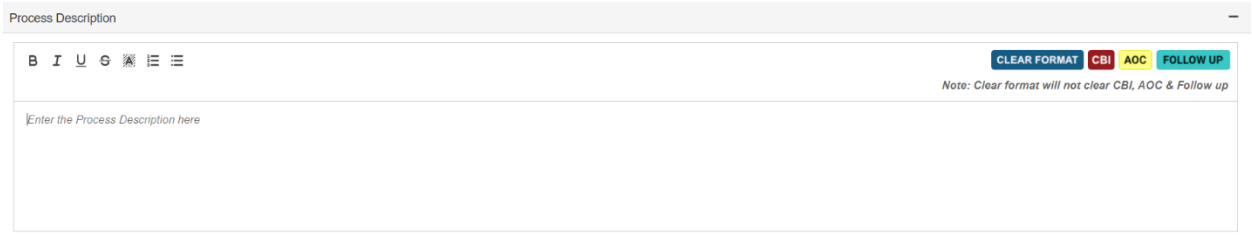
The Facility Info section enables the Lead Inspector to capture answers to the pre-populated questions. The Lead Inspector may add additional questions to keep information organized in a tabular format. This functionality is available to inspectors during Pre-Inspection.

Steps:

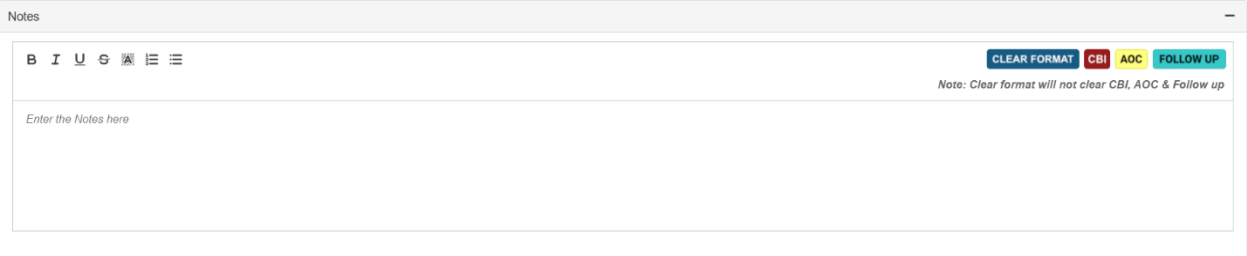
1. Input **Value** to prepopulated fields
2. Delete fields not used, if desired, using **Delete** icon
3. For additional or new fields, click **Add New**
4. Input new **Field** and **Value**



Smart Tools enables inspectors to capture the facility's Process Description. Text can be highlighted and organized as **Confidential Business Information (CBI), Area of Concern (AOC),** or **Follow Up**. Users without CBI access will not see the CBI button.



Smart Tools also enables inspectors to capture additional notes during the Opening Conference. Text can be highlighted and organized as **Confidential Business Information (CBI), Area of Concern (AOC)**, or **Follow Up**. Users without CBI access will not see the CBI button.



Buildings/Areas

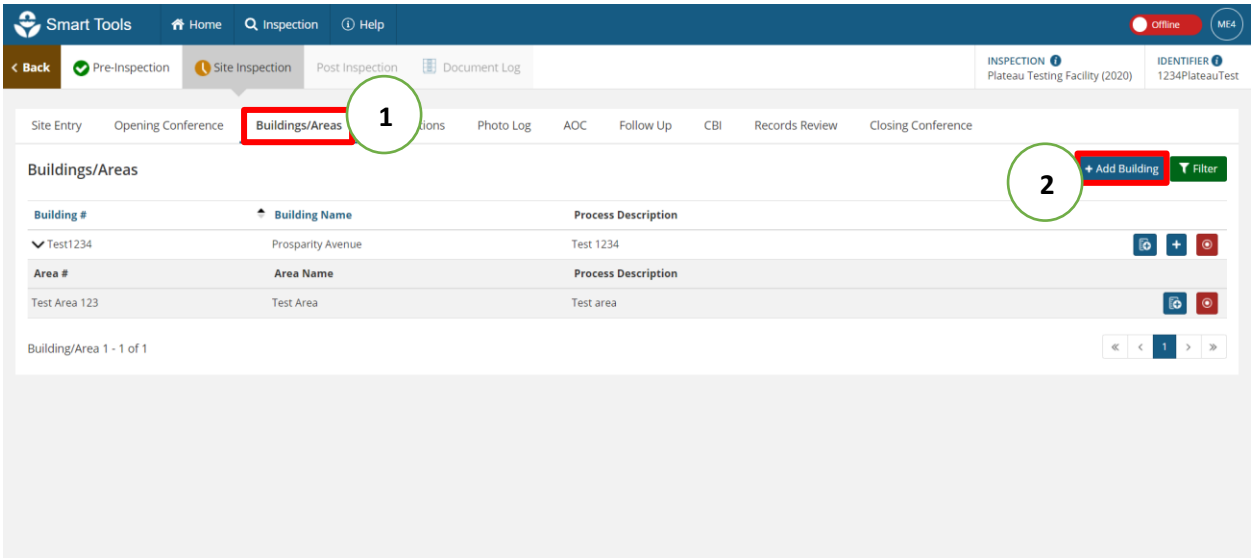
Smart Tools enables inspectors to identify different facility components through creating Buildings and/or Areas in the facility. The hierarchy is as follows: A facility has one or more buildings that make up the facility and each building has one or more areas that are worthy of specific designation. This facilitates the association of observations to specific locations.

Tip: At the end of the opening conference, request a facility diagram and determine the names of the buildings and areas the user would like to inspect. It is important to use the same naming convention used by the facility to avoid confusion. This functionality is available to inspectors during Pre-Inspection, in the event that the user knows the names of the buildings and areas they would like to inspect.

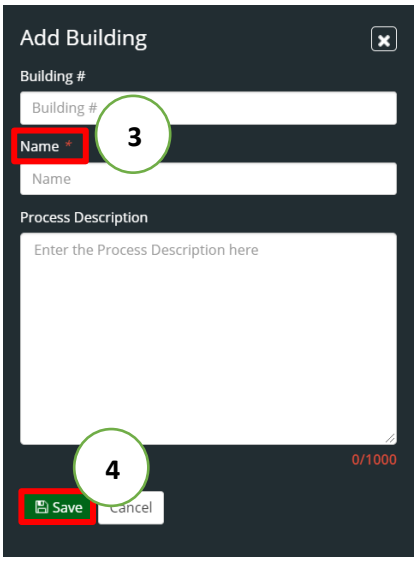
Add a Building

Steps:

1. Select **Buildings/Areas** in **Site-Inspection**
2. Click **Add Building**



3. Enter building information. **Name is a required field.**
4. Click **Save**

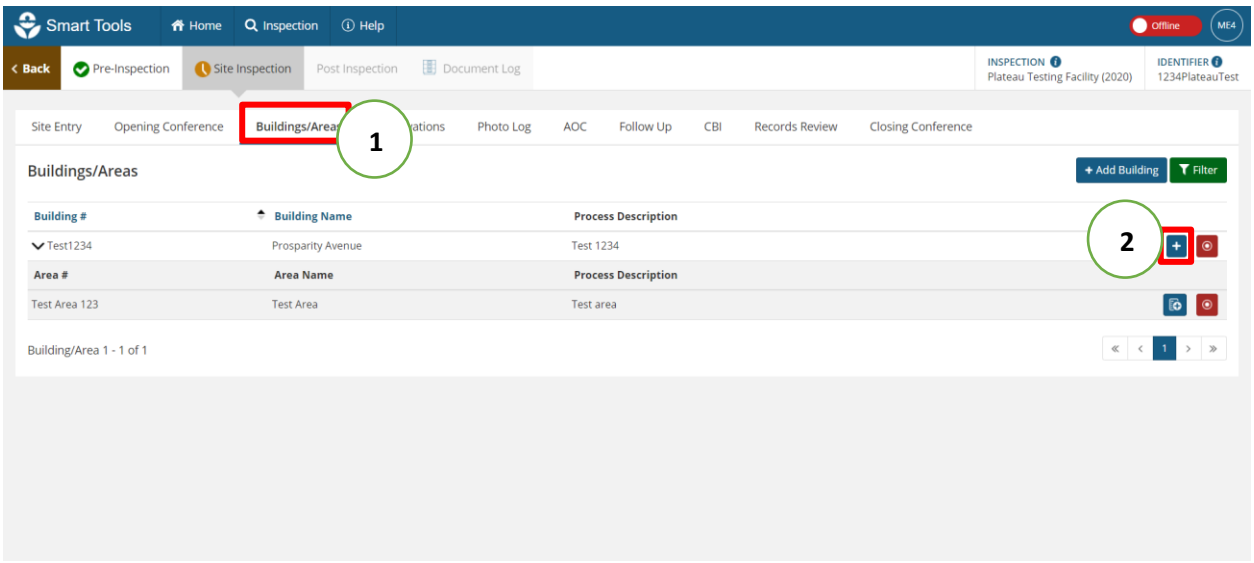


Note: For future inspections at the same facility, Buildings can be deactivated if they are no longer in operation at the facility by clicking **Inactivate Building** icon

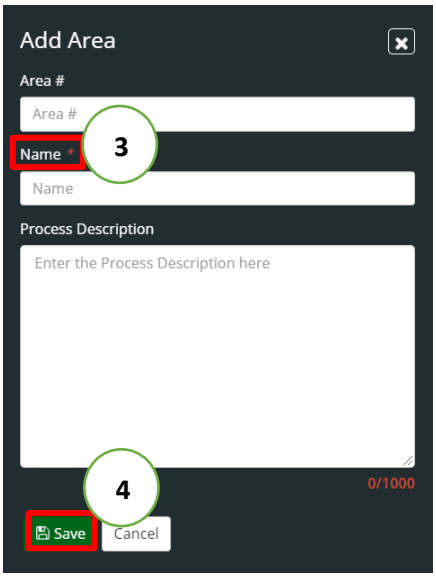
Add Area

Steps:

1. Click **Buildings/Areas** in the **Site Inspection** page
2. Click + icon to **Add Area**



3. Enter area information. **Name** is a required field
4. Click **Save**



Note: For future inspections at the same facility, Areas can be deactivated if they are no longer in operation at the facility by clicking the **Inactivate Area** icon

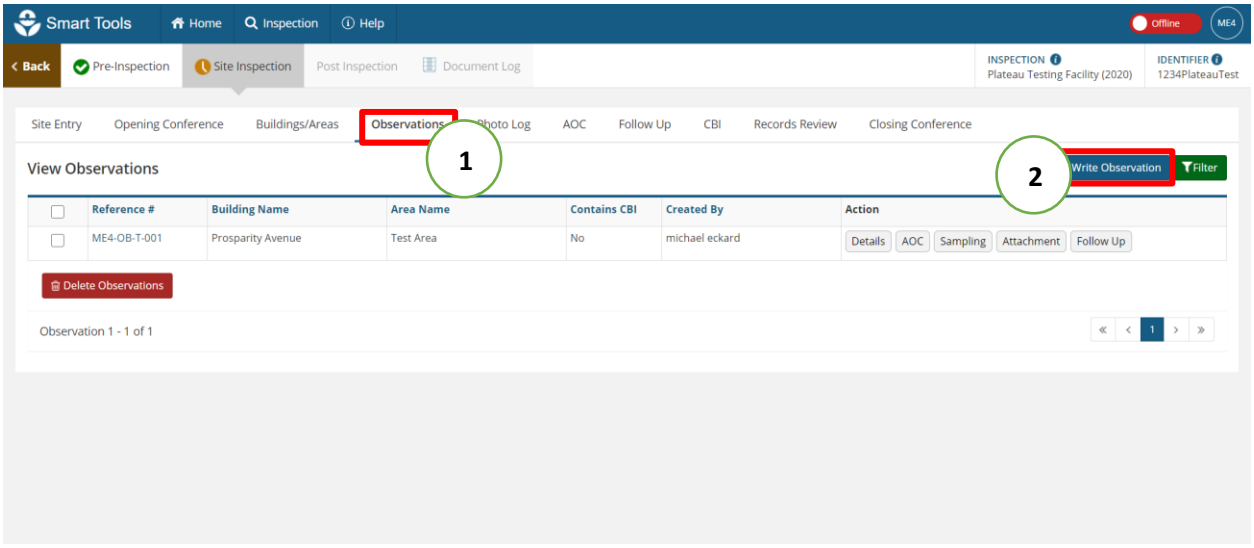
Note: Inspectors can create new observations directly from the Buildings/Areas tab by clicking the **Create Inspection** icon on the same row as the desired building. Such observations will associate directly with these Buildings/Areas. Additional information on writing Observations is provided below.

Writing an Observation

Now the user is ready for the facility walk through. In order to capture observations at a particular site, users will Write an Observation to capture all of the information, including Details, Areas of Concern, Images/Documents, Sampling information, and Follow up items. The dashboard will indicate if there is information captured in any of the five areas. Once an observation is created, it will auto generate a reference number based on the user ID and number based on the sequence in which it was created.

Steps:

1. Click on **Observations** in the **Site Inspection** page
2. Click **Write Observation**

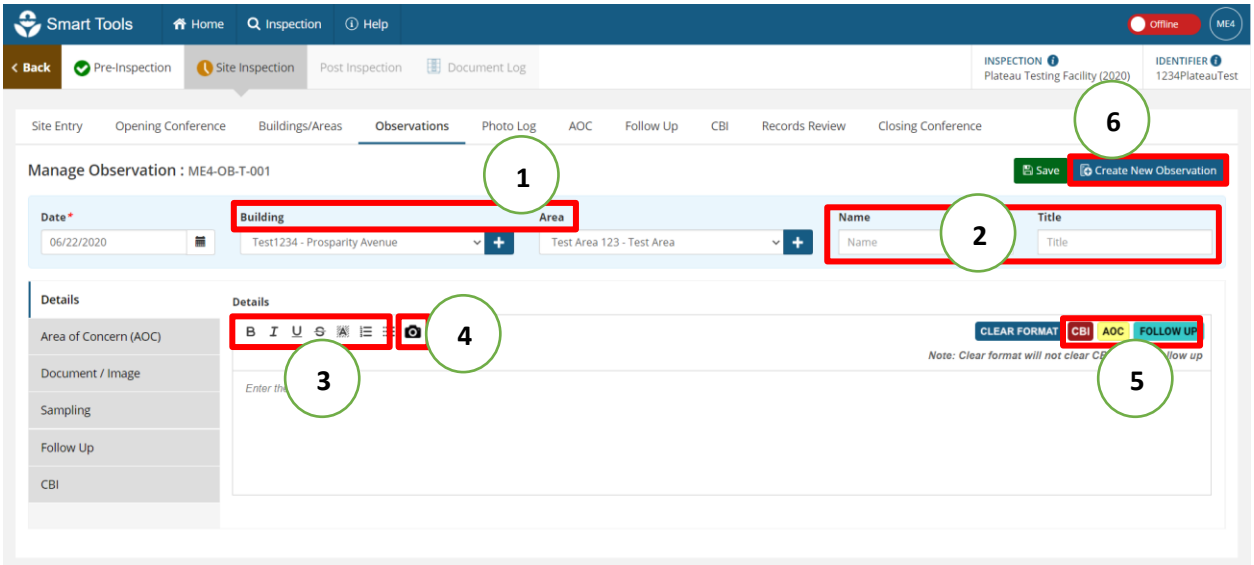


Details

The Details tab is where inspectors will document their observations. All notes an inspector wants to make will be captured here. From this Details tab, the inspector can organize and categorize information how they see fit.

Features:

1. Associate specific buildings and areas with this observation. Buildings and areas associated with this facility will appear in the dropdowns
2. Identify a Point of Contact (POC) at the particular location
3. Rich Text for personalized touches
4. Activate the device's camera and associate photos taken with a particular observation
5. Mark information as **Confidential Business Information (CBI), Area of Concern (AOC)**, or **Follow Up** by highlighting text and clicking on the desired button. Users that do not have CBI access will not be able to see or use the CBI information and functions
6. Create a new observation from the current observation and prepopulate the building/area information with the current selection.

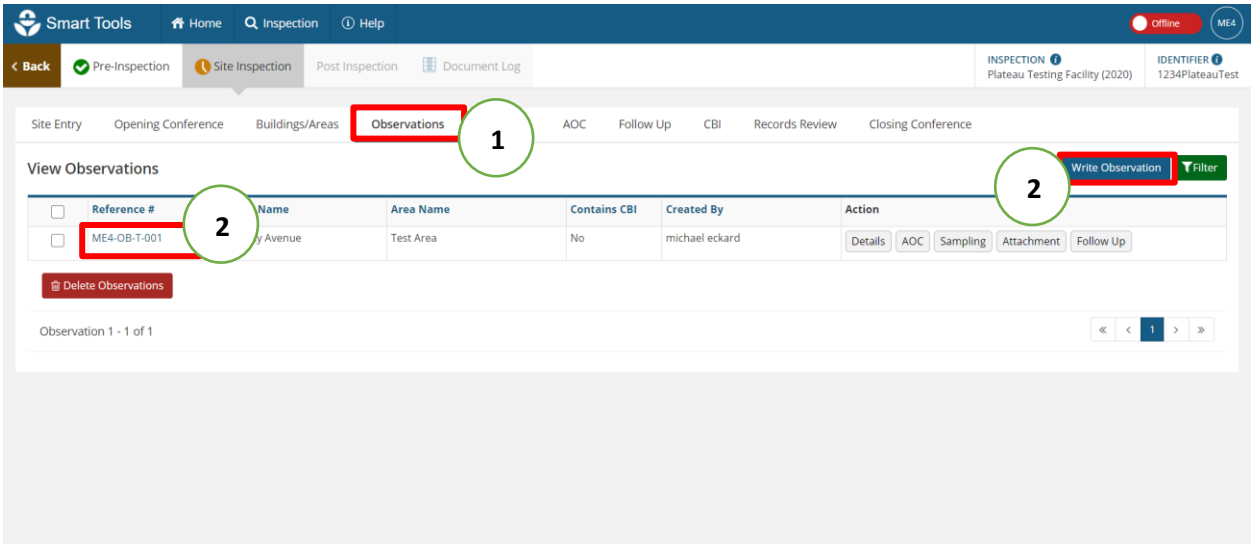


Linking Citations for Observations in the Field

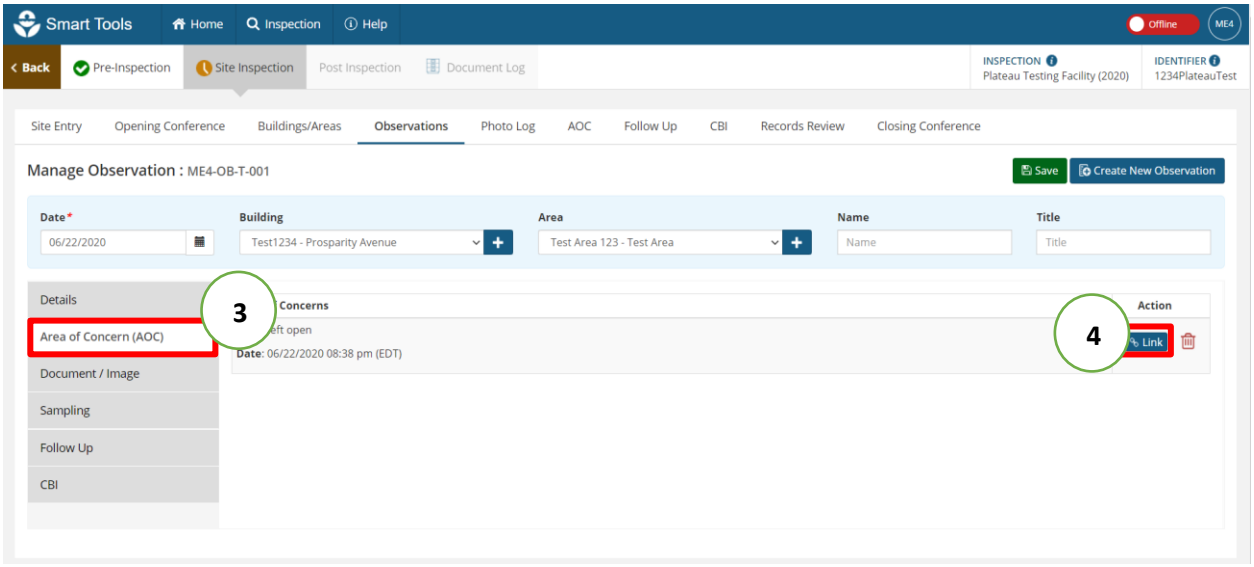
During Pre-Inspection, users can select which federal regulatory codes they wished to associate with this inspection (for more information see the **Pre-Inspection section**). Once an item is marked as an Area of Concern (AOC), inspectors can link federal regulatory citations to each of the AOCs. This can be done by either selecting specific portions of the regulatory code in the dropdowns or by searching based on requirement language or citation number. Select as many citations associated with the identified AOC. The feature for states to enter state regulatory citations is forthcoming.

Steps:

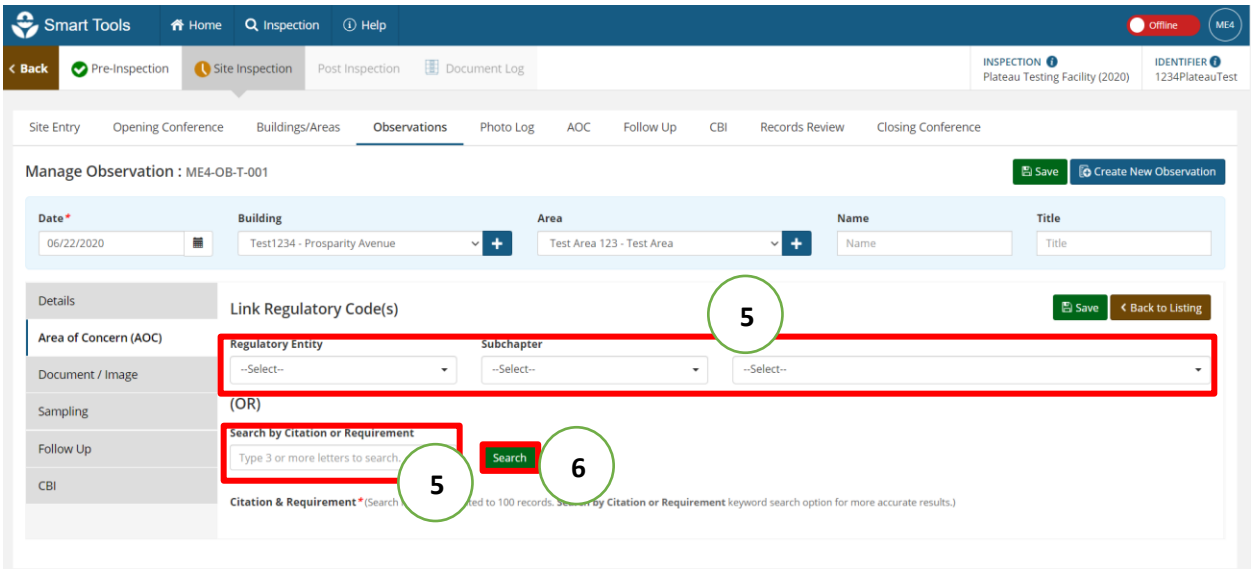
1. Click **Observations** in the Site-Inspection page
2. Click on either the **Reference Number** OR an existing observation or click **Write Observation**



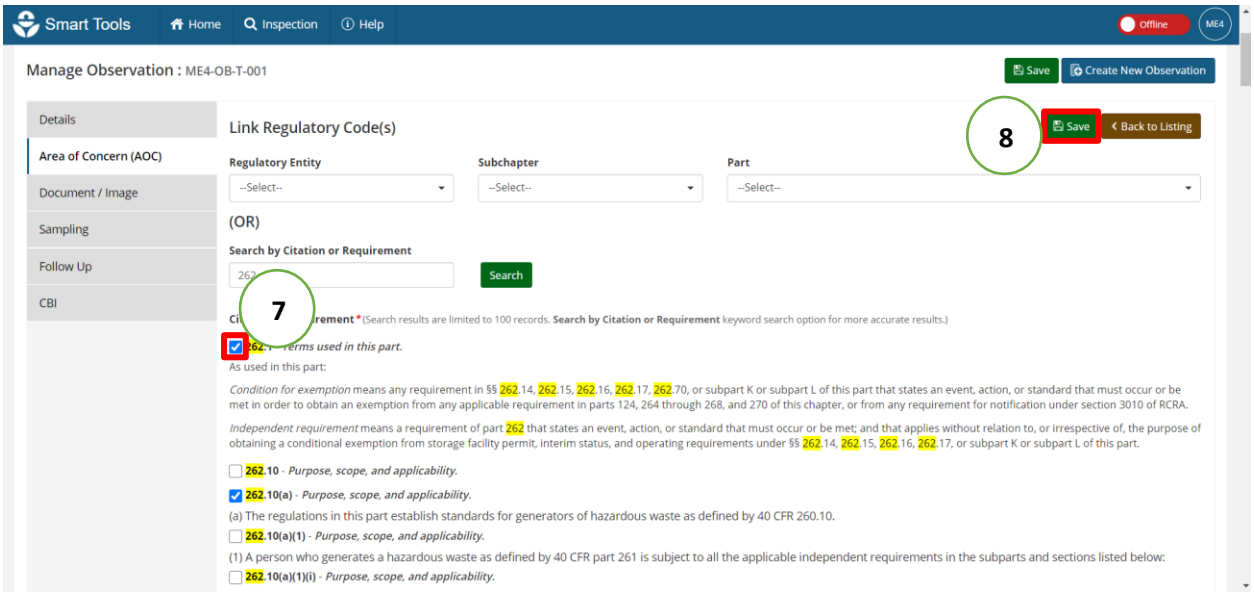
3. Click **Area of Concern (AOC)** tab
4. Click **Link**



5. Select specific portion of the regulatory entity by using the dropdowns OR search based on requirement language or citation number. If using the search feature, searched text will be highlighted.
6. Click **Search**



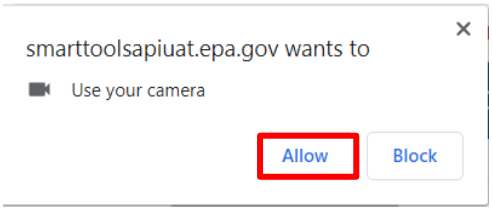
7. Select citation(s) associated with the identified AOC
8. Click **Save**



Camera

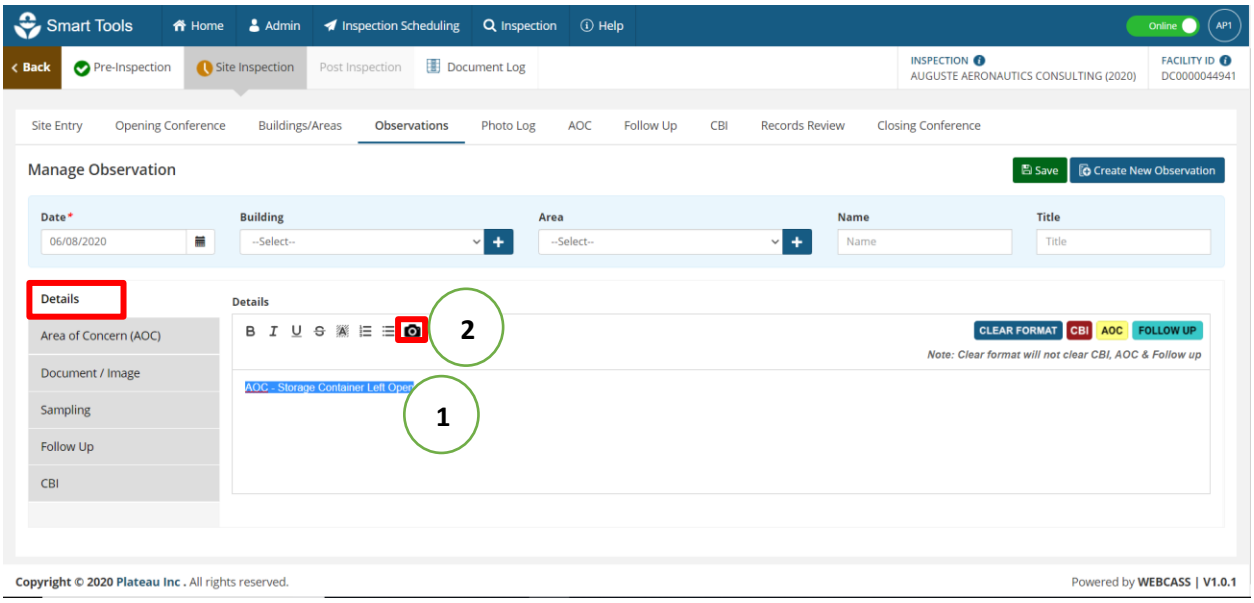
Smart Tools enables users to take photos to directly associate with specific Observations and during the Records Review.

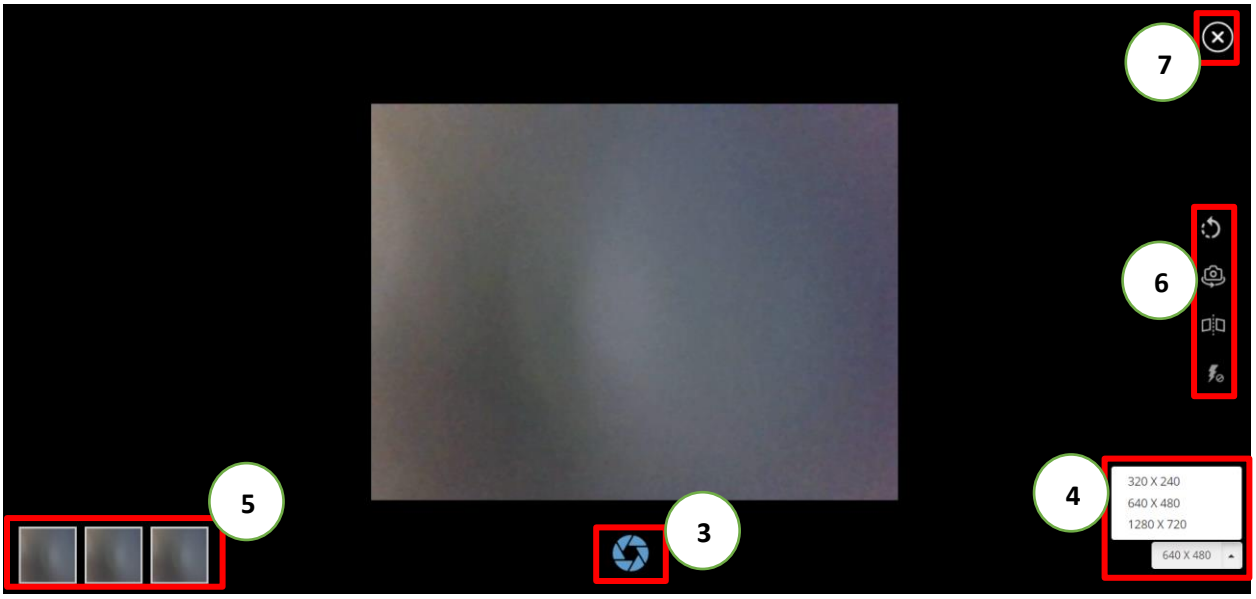
Users may need to allow the web browser to access the device's camera by clicking **Allow** if the following popup appears:



Features:

1. Highlight text to prepopulate the photo's description. Three (3) pictures with different angles of the same object can be taken at a time when the camera app is open. Of course, a user can take as many photos as needed while in the field.
2. Open device's camera directly from Smart Tools
3. Click to capture a picture
4. Change the resolution in the dropdown for more detailed photos. Smart Tools defaults to the middle resolution
5. See the thumbnails of up to three (3) photos taken from different angles of the same object
6. Adjust the camera for the photo: rotate, flip, mirror, or activate device's flash
7. Once taken, photos autosave so users can easily close the camera without accidently losing photos.




7
6
5
3
4
320 X 240
640 X 480
1280 X 720
640 X 480

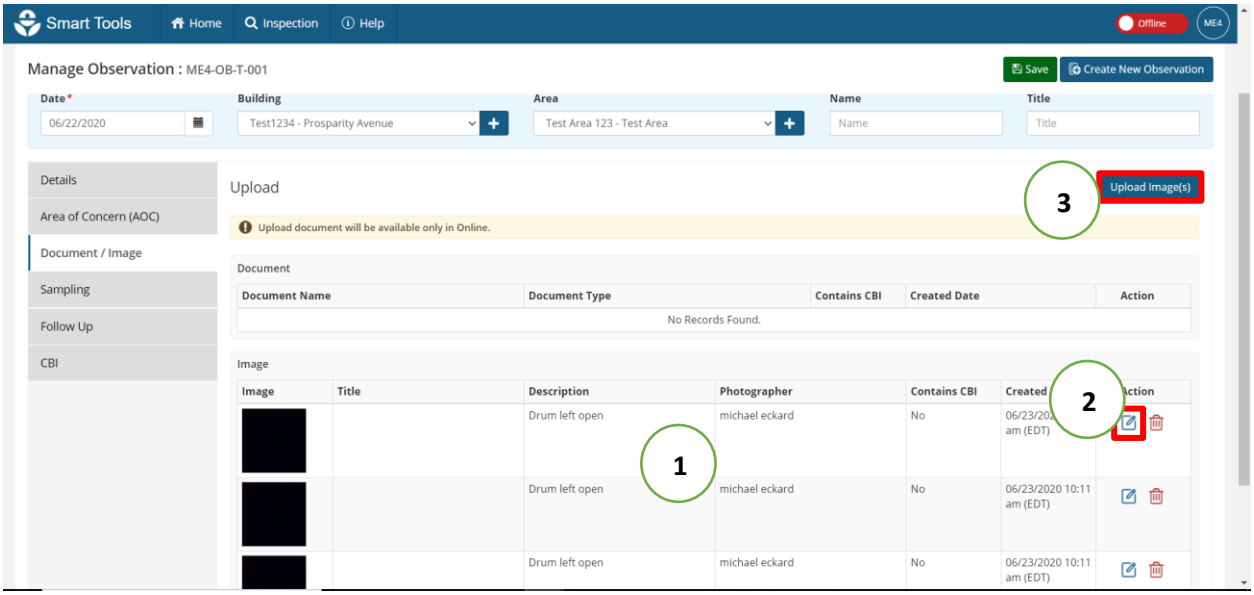
Document/Image

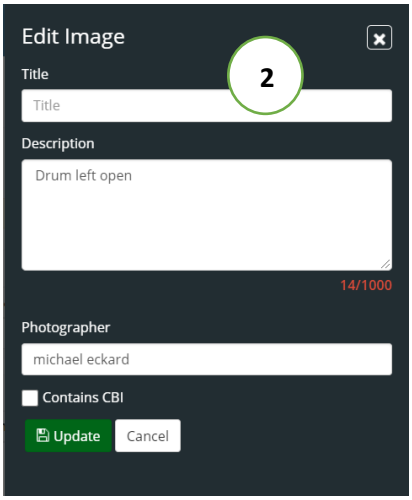
View photos associated with individual observations and edit photo characteristics. **This does not edit the photo itself.** Photos may also be uploaded into Smart Tools if taken with a third-party camera. All photos will populate in the inspection **Photo Log.**

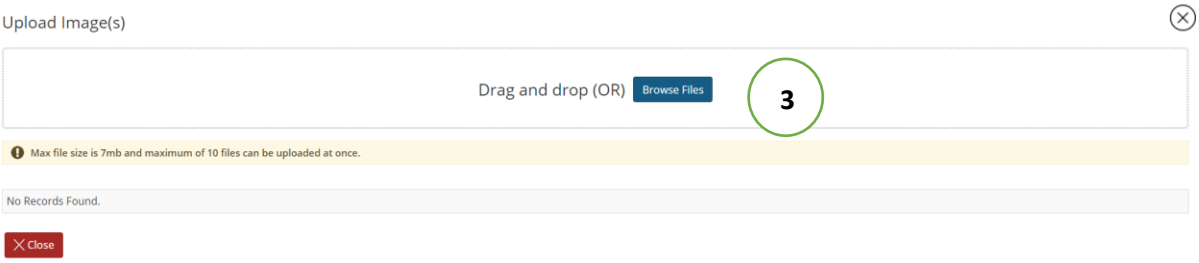
Upload documents to associate with a particular observation. Uploading documents can only be done while online due to space constraints on the device itself. All documents will populate in the inspection **Document Log.**

Features:

1. View photo information
2. Edit photo information: Change Title, Description, and mark whether the photo contains CBI **Users without CBI access will not be able to see photos marked as containing CBI**
3. Upload third-party photos. Smart Tools enables users to upload photos in bulk.







SMART TOOLS HELP DESK

(703) 651-6737

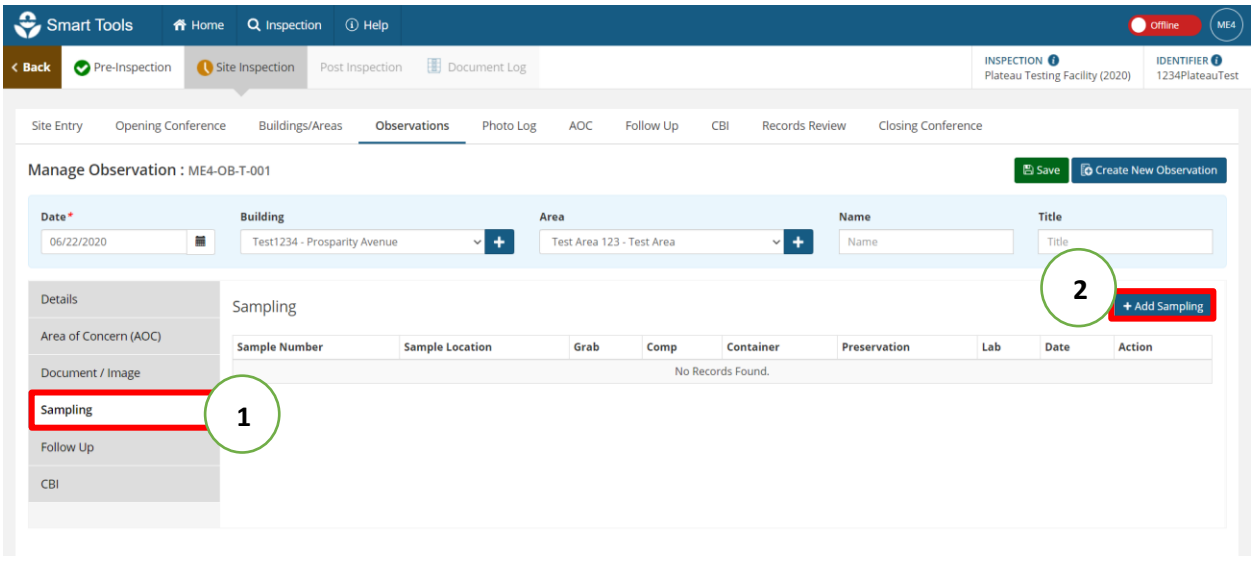
Smarttoolshelpdesk@plateauinc.com

Sampling

Smart Tools enables users to record any samples that were taken on site.

Steps:

1. Click **Sampling** tab on the **Site Inspection** page
2. Click **Add Sampling**



3. Enter sampling information. At a minimum, users must enter a **Sample Number**
4. Click **Save**

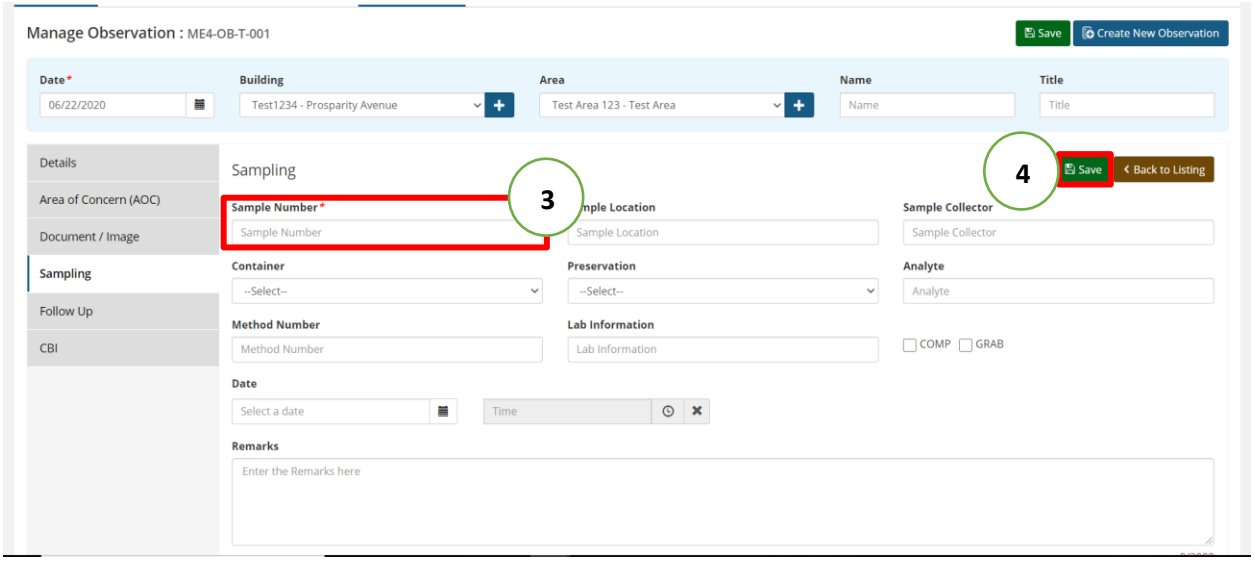


Photo Log

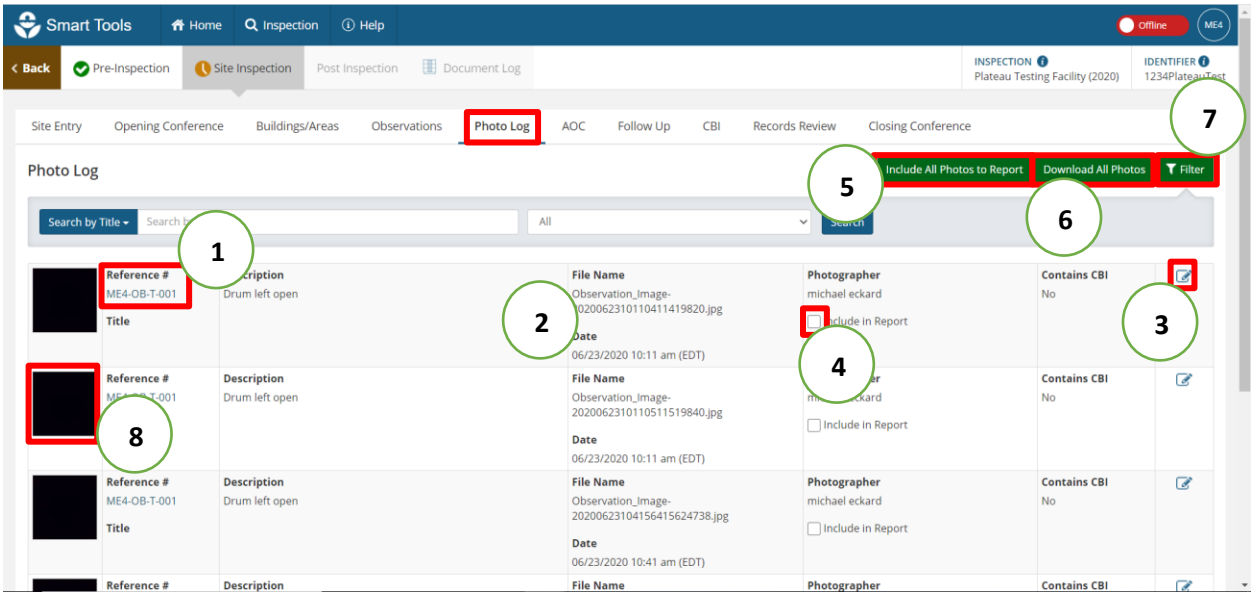
Now that we have finished discussing the left menu bar, let's look at a few of the features at the facility level (e.g., Photo Log on the top menu bar). The Photo Log is a consolidated list of all pictures taken during the inspection.

Features:

1. Photos are assigned a Reference # that works as a hyperlink, which enables users to quickly go back to the place in Smart Tools the photo was taken
2. Photo information displayed for easy reading
3. Edit photo information: Change Title, Description, and mark whether the photo contains CBI. **Users without CBI access will not be able to see photos marked as containing CBI.** **Click for more information about Editing Photo Information**
4. Mark individually whether to include in the Inspection Report
5. Select ALL photos to include in the Inspection Report
6. Download ALL photos into a zip file to send to a facility, if requested. This does not download photo information, only the photo itself
7. Use the Filter dropdown to search through the Photo Log

> **Note:** The Applied Filter will remain until it is reset, or the search criteria is changed

8. View picture thumbnails. Click on thumbnail to enlarge photo.



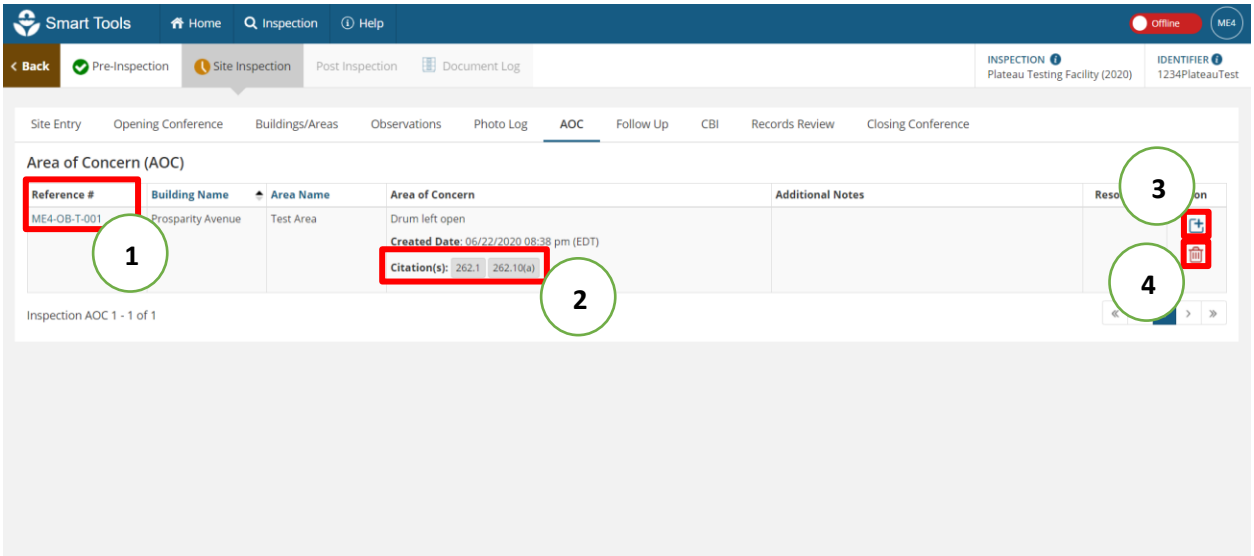
Area of Concern (AOC)

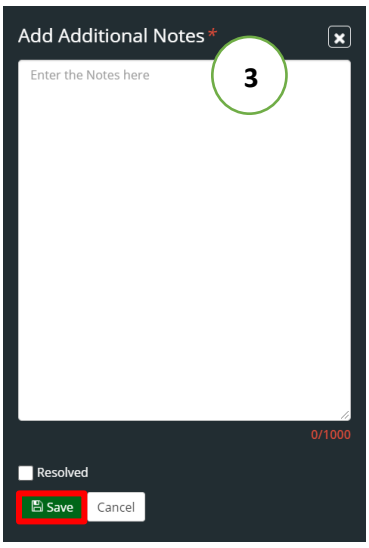
The AOC tab at the inspection level is a consolidated list of the AOCs documented throughout the inspection. This consolidated list can be very helpful to the inspector during the Closing Conference.

Features:

1. AOCs are assigned a Reference # that works as a hyperlink enabling users to quickly go back to the place in Smart Tools where the AOC was identified
2. Display previously linked citations
3. Additional Notes can be added to provide more context to the AOC. Additionally, each AOC can be marked as Resolved if the issue was handled during the inspection but needs to remain an identified AOC. Any Additional Notes added can be edited in this tab
4. Remove the AOC by selecting the delete icon and unlink from the original text

Note: More information about the functionality of AOCs can be found in **Organizing Data**





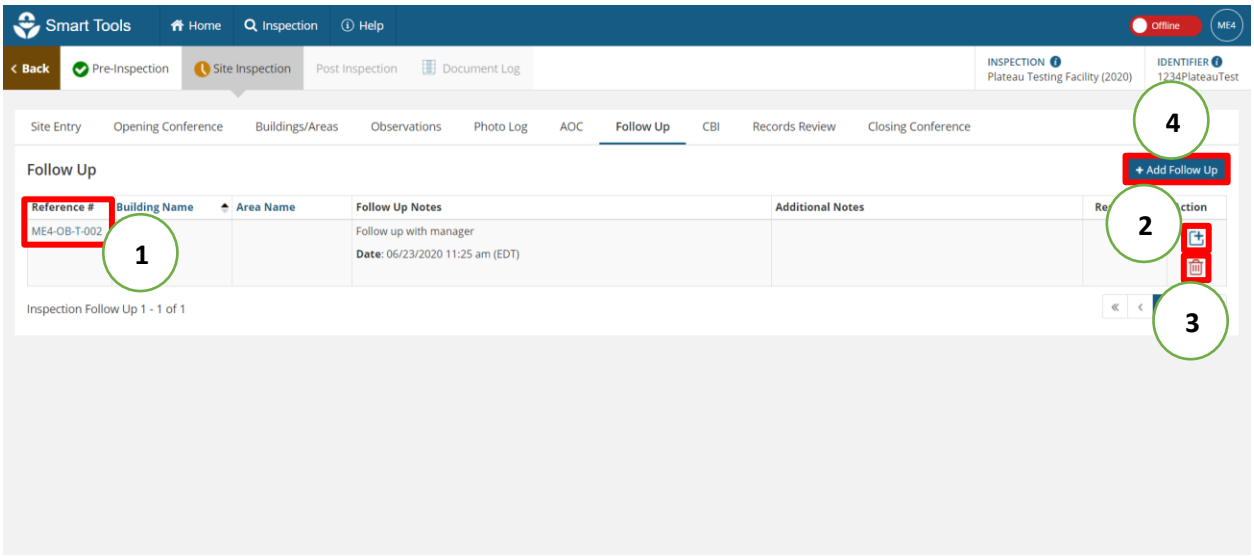
Follow Up

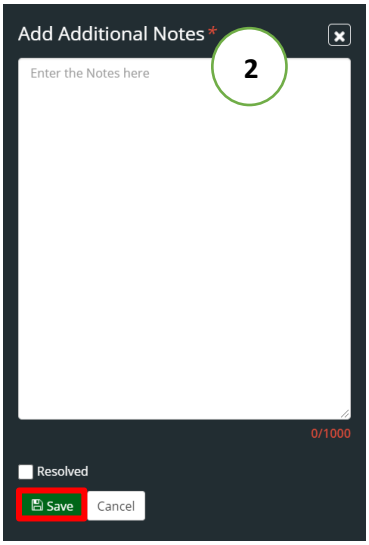
The Follow Up tab is a consolidated list at the inspection (facility?) level of all Follow Up items identified throughout the inspection.

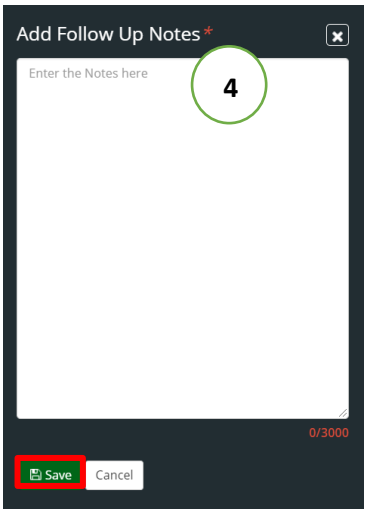
Features:

1. Follow Ups are assigned a Reference # that works as a hyperlink which enables users to quickly go back to the place in Smart Tools to where the Follow Up was identified
2. Additional Notes can be added to provide more context to the Follow Up. Additionally, each Follow Up can be marked as Resolved. Any Additional Notes added can be edited in this tab
3. Remove the Follow Up by selecting the delete icon and unlink from the original text
4. Add Follow Items on the fly. **Note:** This tab is available during Pre-Inspection so that users can build a list prior to entering the facility.

Note: More information about the functionality of Follow Ups can be found in **Organizing Data**







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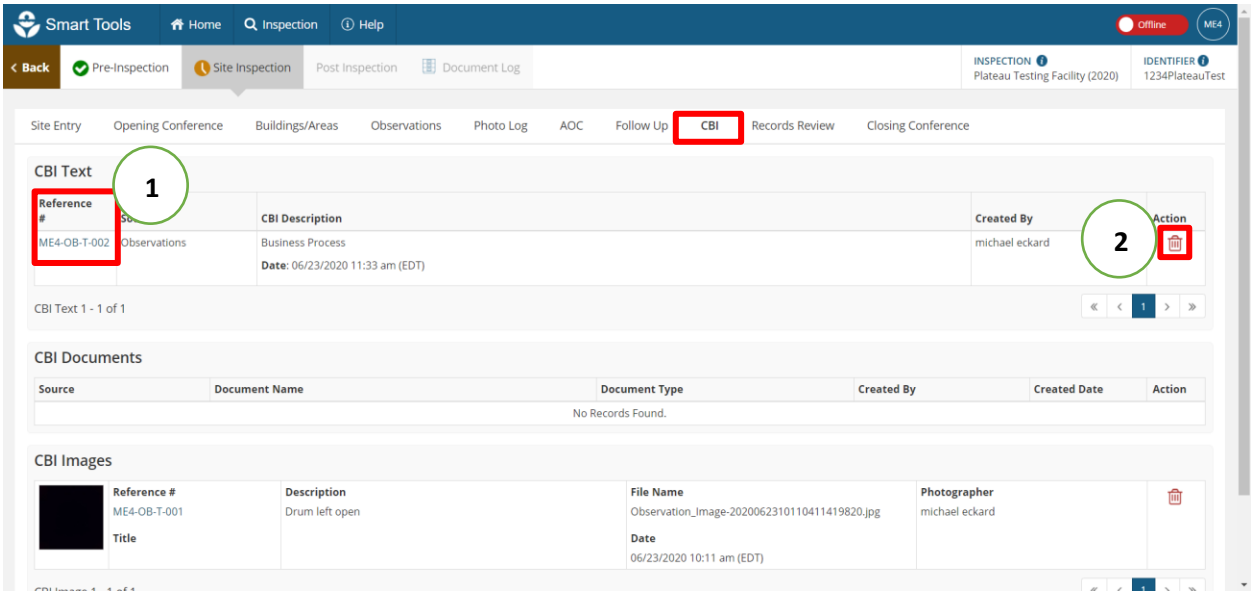
CBI: (Confidential Business Information)

Smart Tools enables users to view all of their information identified as CBI (Text, Documents, and Images) that was captured throughout the Site-Inspection process in one convenient location.

Features:

1. CBI identified information is assigned a Reference # that works as a hyperlink enabling users to quickly go back to the place in Smart Tools to where the CBI was identified
2. Remove the CBI by selecting the delete icon and unlink from the original text

Note: More information about the functionality of CBI can be found in **Organizing Data**



Records Review

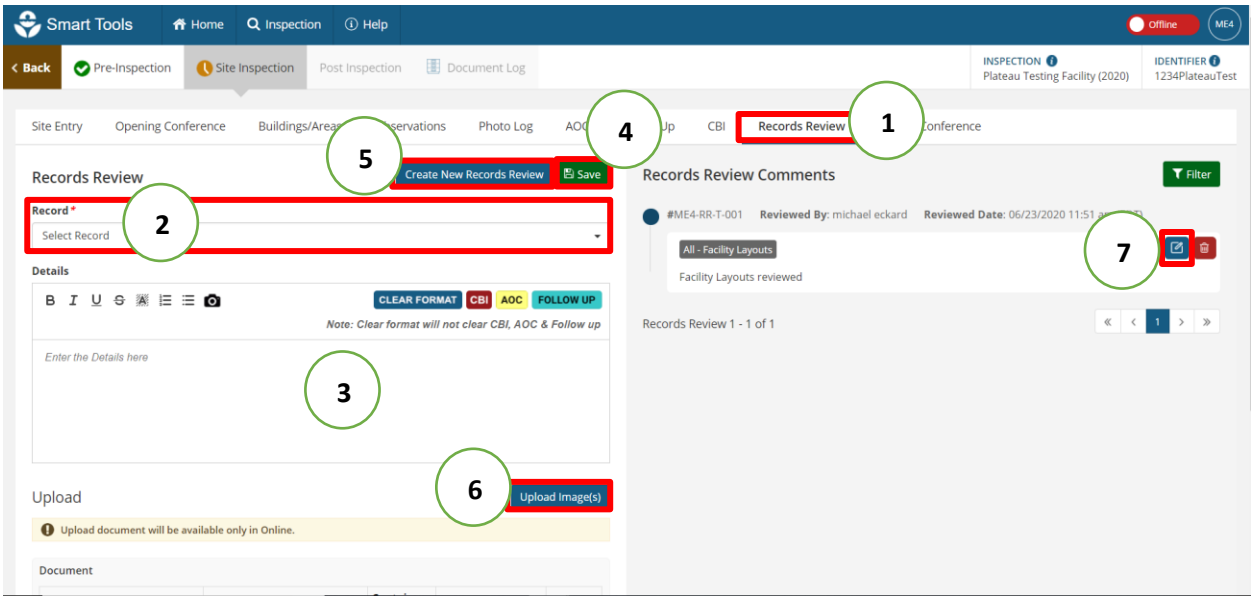
The Records Review tab operates similar to the **Details** section of Observations with similar features. The user can check off the specific records that were reviewed and capture notes accordingly in the Details section.

Steps:

1. Click on **Records Review** tab on the Site Inspection page
2. Search for a Record in the **Record** searchable text field. The field operates as a dropdown, however, once the user begins typing in the field Smart Tools will begin narrowing down the list as the user inputs more characters
3. Take necessary notes and photos using features in the Details text box
4. Click **Save**. After clicking Save, all records reviewed will populate on the right side of the screen
5. To create a new record review click **Create New Records Review**. Information from the previous record will remain even after **Create New Records Review** is clicked
6. To upload third-party camera photos, click **Upload Image(s)**
7. Edit previously reviewed records. By clicking the **Edit** icon, Smart Tools will open the previously entered information for that record on the left side of the screen.

Note: Documents can also be uploaded to associate with a specific Record but can only be done while online to save space on the device

Note: More information about the functionality of **CBI, AOC**, and **Follow Up** can be found in **Organizing Data**



Closing Conference

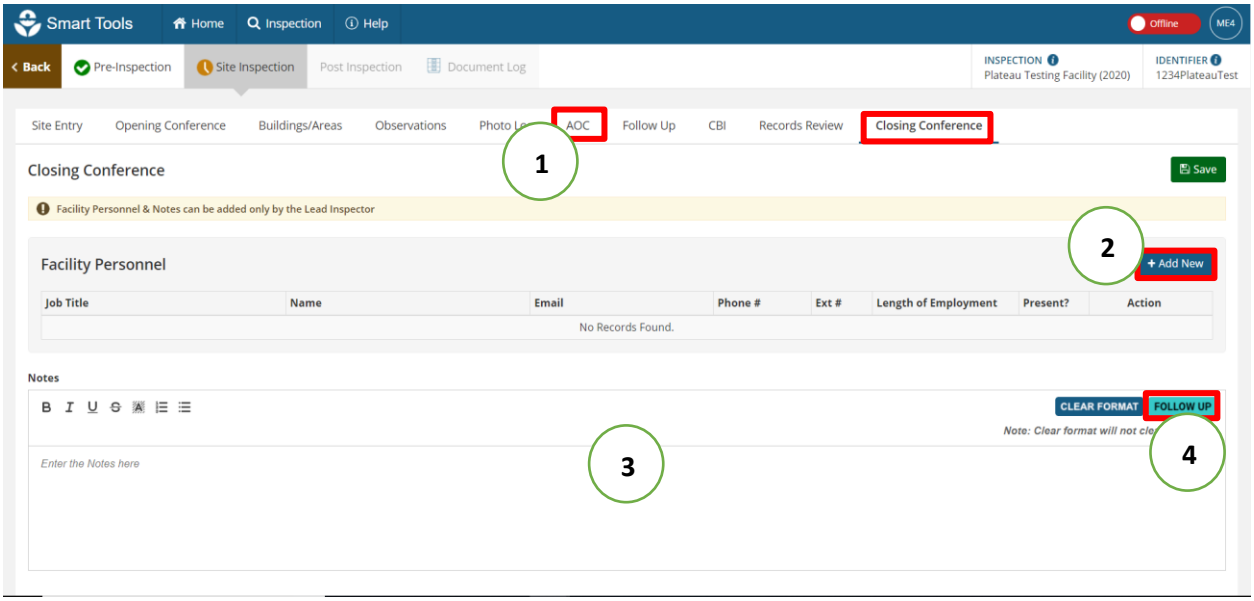
When the user is ready to conduct the closing conference, click the **Closing Conference** tab next to Records Review. This tab helps the user organize the notes for the closing conference. The user can also use the list of AOC and Follow Up to assist with this meeting.

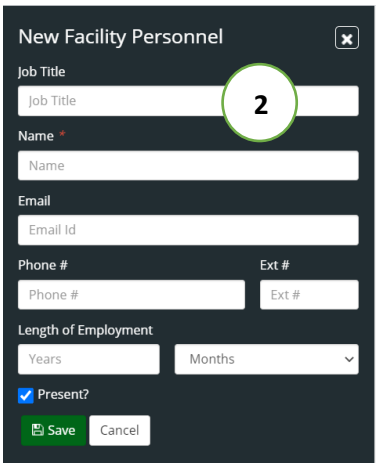
Features:

1. Utilize the AOC list in the AOC tab and the Follow Up list to help conduct the Closing Conference
2. Add new Facility Personnel by clicking **Add New**. The Opening Conference list of facility personnel will be pre-populated here

> **Note:** If an individual is deleted from either the Opening Conference list or the Closing Conference list, it will reflect the deletion in both lists. Utilize the **Present** column to note which conference the individual attended.

3. Add notes pertaining to the Closing Conference
4. Create new Follow Up items that will populate into the Follow Up tab.

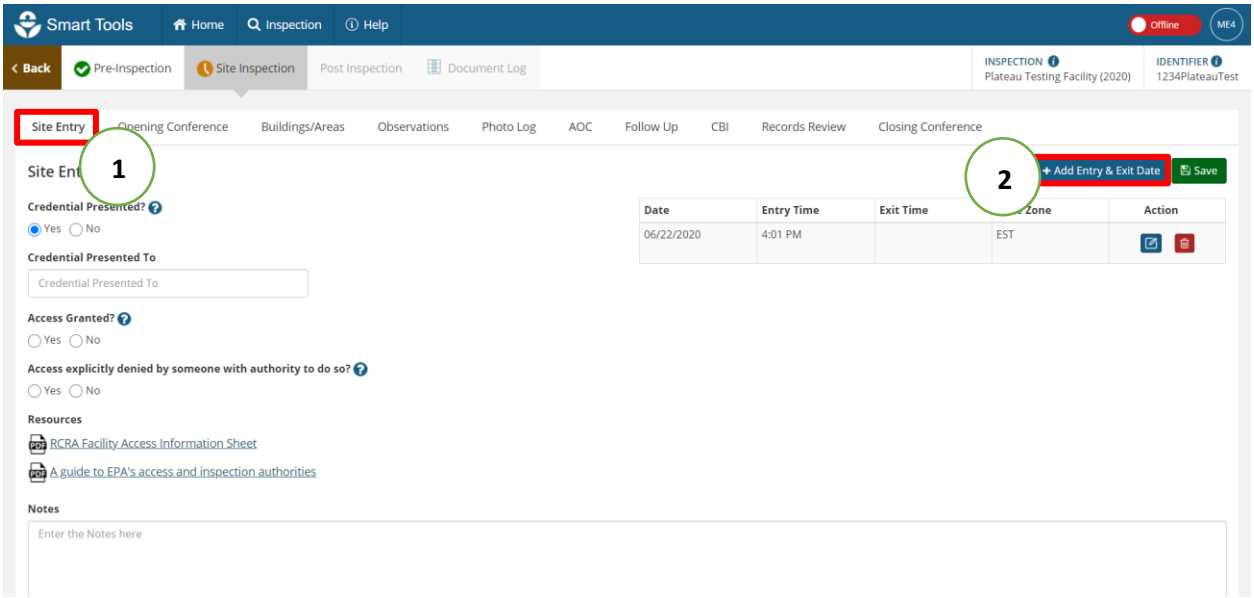




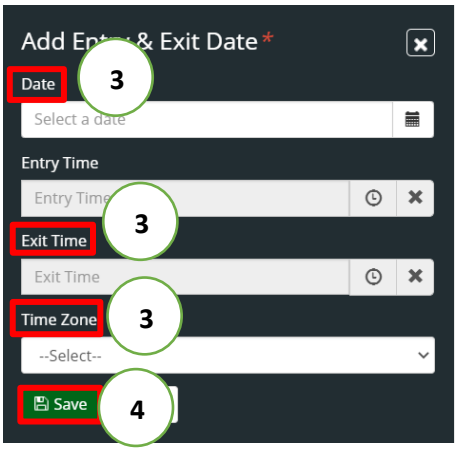
Note: Users must enter an Exit Date and Time before leaving the facility.

Steps:

1. Navigate back to the **Site Entry** tab
2. Click **Add Entry & Exit Date**



3. Enter **Date**, **Exit Time**, and **Time Zone**
4. Click **Save**



Coming Back Online

Steps:

1. After returning from the field, the user will click on the slider where it says “Offline” to then go back into Online mode. Smart Tools will not allow a user to come back online if there is no internet connectivity so the user must ensure their connectivity is strong.

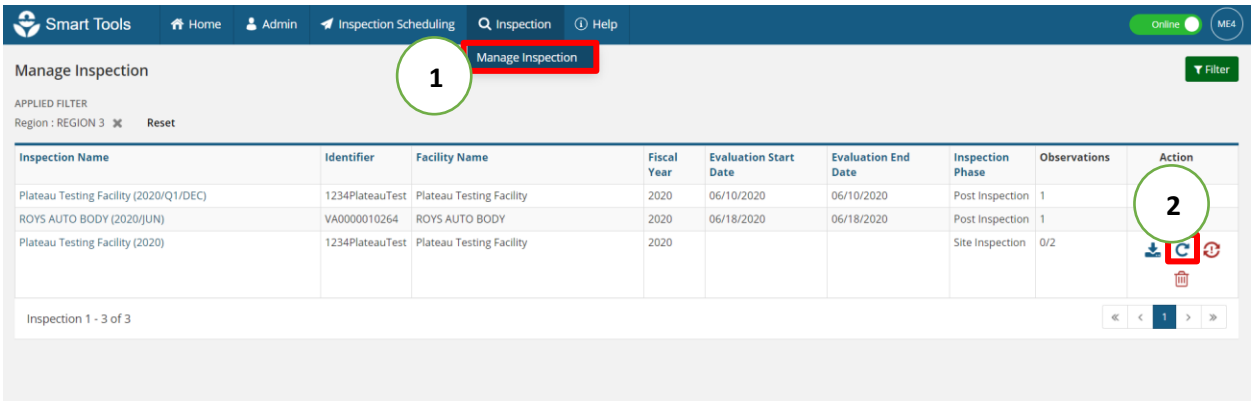
Syncing Data

After coming back online, a user will need to Sync their data to the server. In the event of a multi-inspector inspection, the Lead Inspector will be able to merge all observations into a single inspection after all inspectors sync their data to the server.

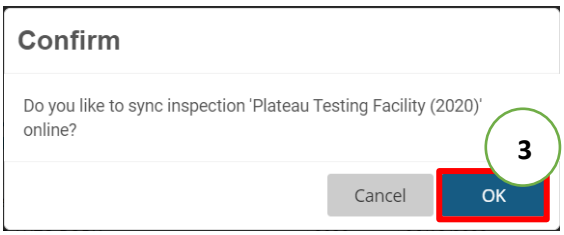
> **Note:** Be sure to have a strong internet connection before Syncing Data to ensure no issues or delays in uploading inspection data.

Steps:

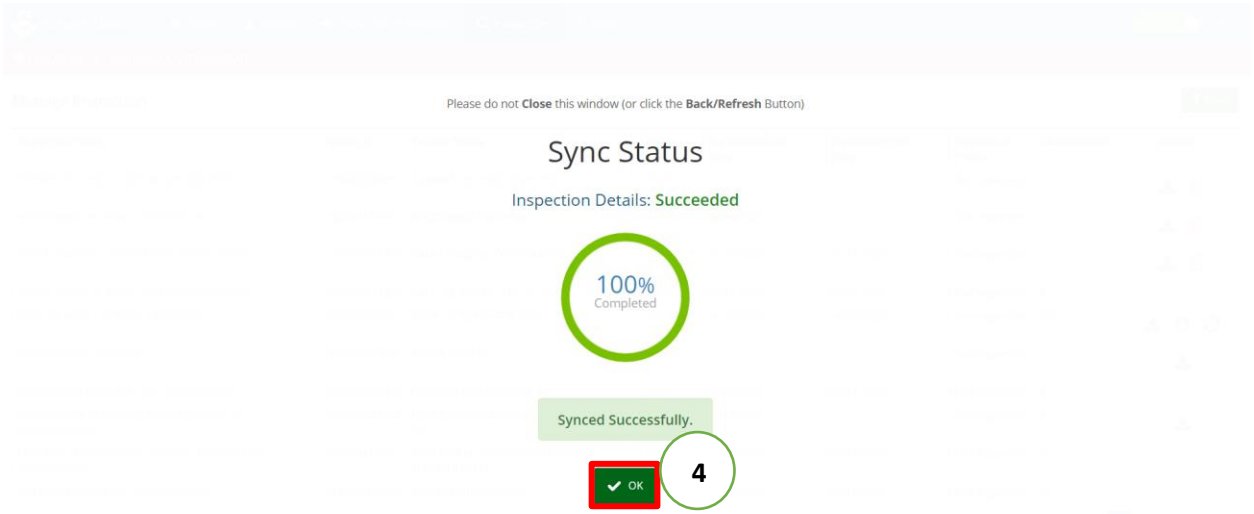
1. Under Inspection click on **Manage Inspections**
2. Click the **Sync** icon



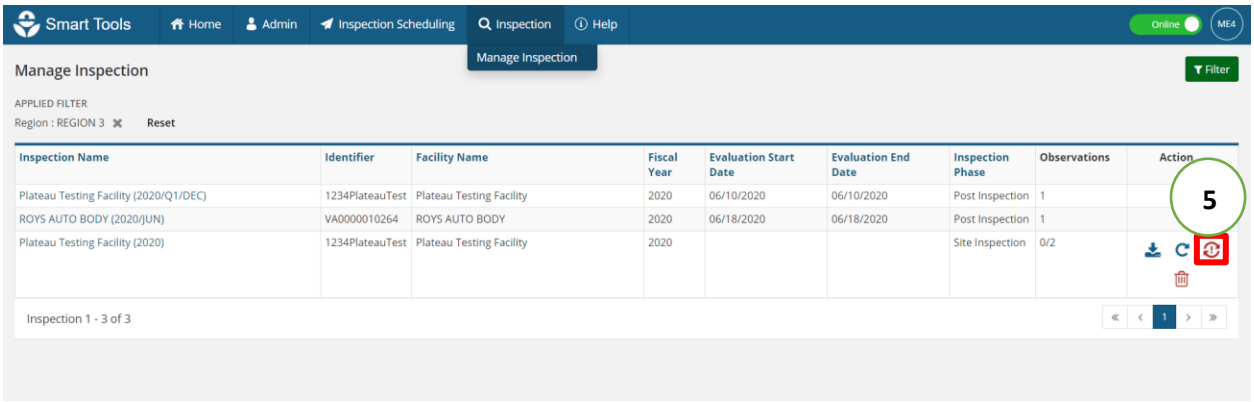
3. Confirmation popup will appear. Click **OK**



4. Once a user has clicked the Sync icon, the user will see a status page of the syncing process that informs the user once sync is complete. Once complete, click **OK**



5. If the user has clicked the Sync icon and an error occurs, the user can select **Report Sync Issues** which allows a user to download the inspection information as a ZIP file and send to Plateau Software's Web Administrators to upload the inspection data.



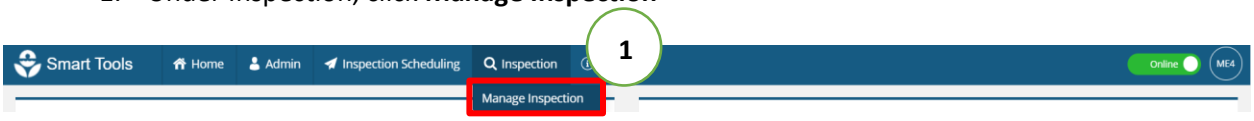
Site Inspection Complete

Once online and data have been synced with the server, the user needs to click Complete Site Inspection. This will trigger 3 events:

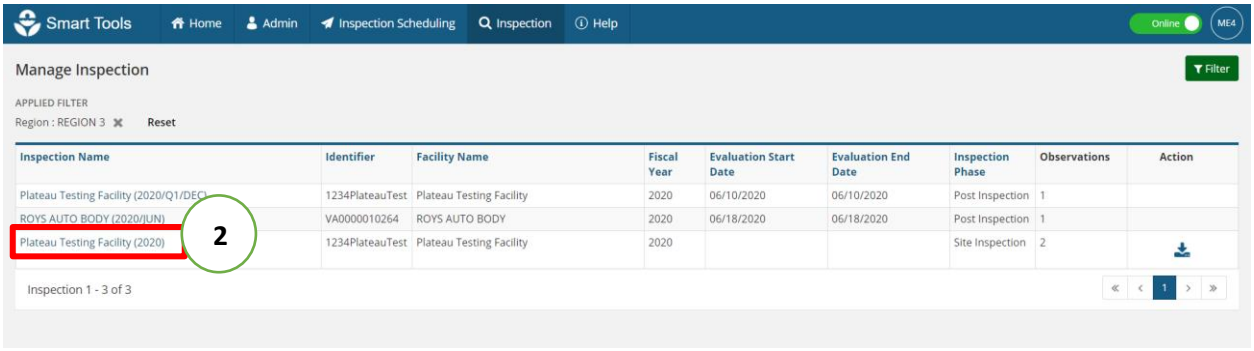
1. The user will have access to the Post-Inspection tab.
2. A PDF Field Notes version will be created in the Post-Inspection Sign Off tab to preserve the notes taken in the field.
3. An Audit Trail will be activated to track all changes moving forward. Additional information on these three actions are located in the following **Post-Inspection** sections.

Steps:

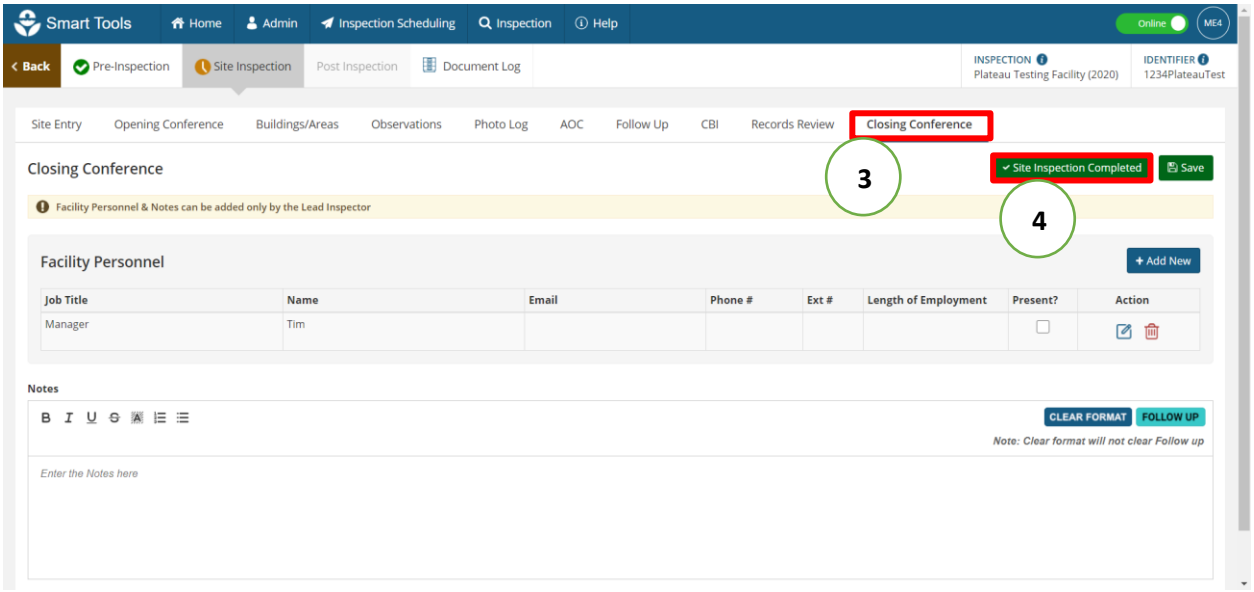
1. Under Inspection, click **Manage Inspection**



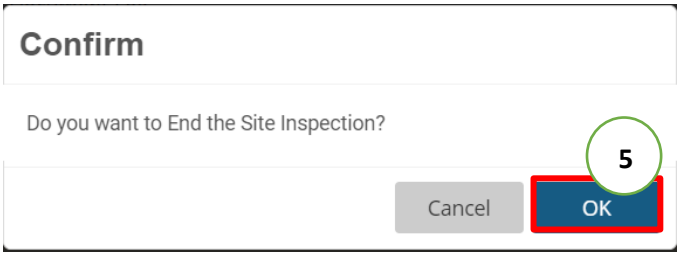
2. Click on the **Inspection Name** (blue hyperlink)



3. Navigate to the **Closing Conference** tab
4. Click **Site-Inspection Completed**



5. Confirmation popup will appear. Click **OK**



Post-Inspection Process

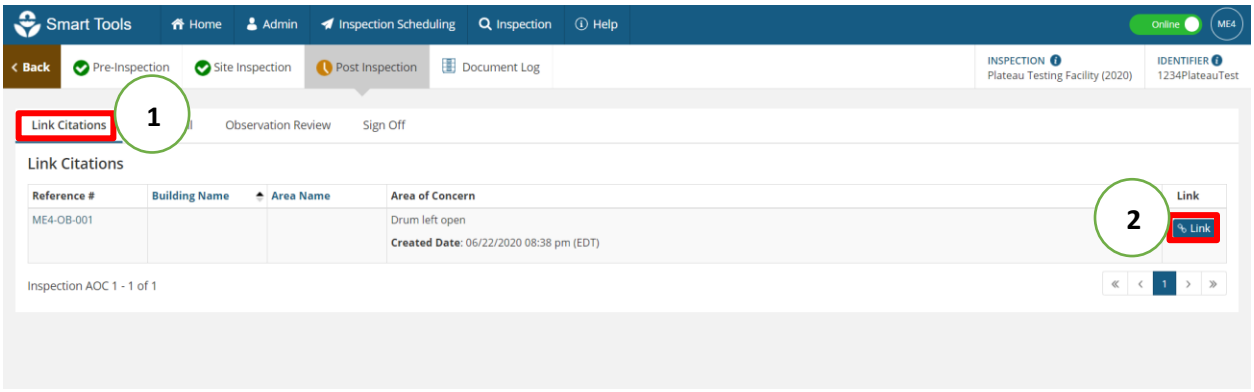
Linking Citations

In the Linking Citations tab in Post-Inspection, the list of all Areas of Concern (AOCs) from the Site-Inspection phase will carry over to this tab. The user can link their **Areas of Concern** to specific federal regulations.

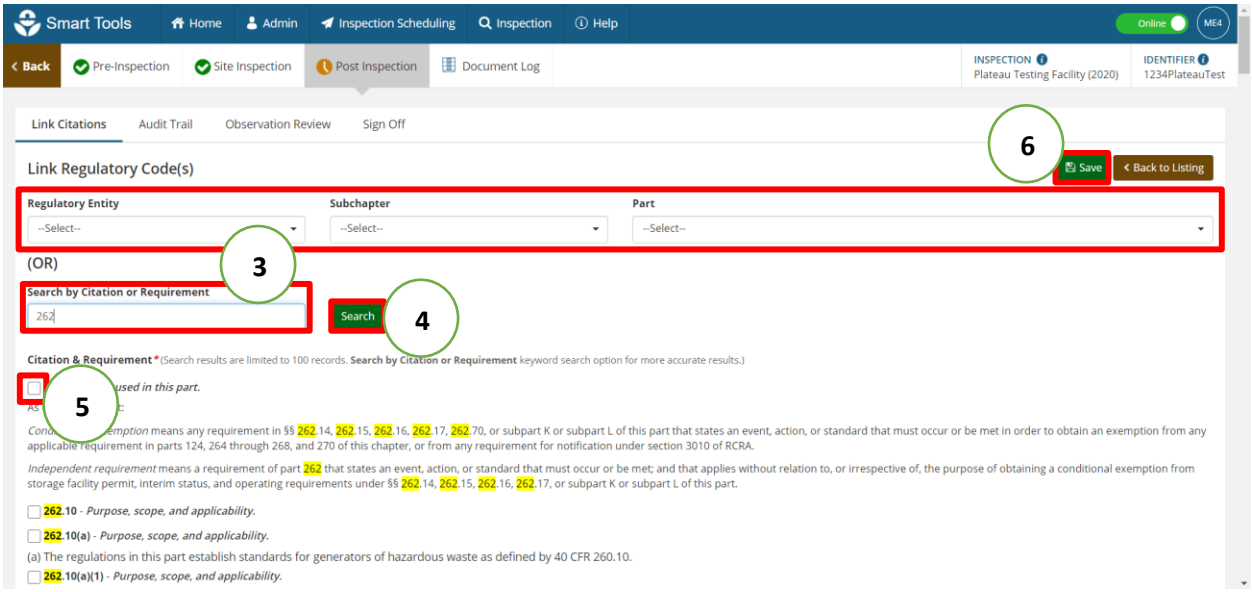
> **Note:** This is the second area a user can link citations. The first is during the inspection process in each observation in the Area of Concern tab. Any citations that were linked at the observation level will be seen in this tab as well and vice versa. See **Linking Citations for Observations in the Field** for more information.

Steps:

1. Click **Link Citations** in the Post Inspection page
2. Click **Link**



3. Select specific portion of the regulatory entity by using the dropdowns OR search based on requirement language or citation number. If using the search feature, searched text will be highlighted
4. Click **Search**
5. Select citation(s) associated with the identified AOC
6. Click **Save**

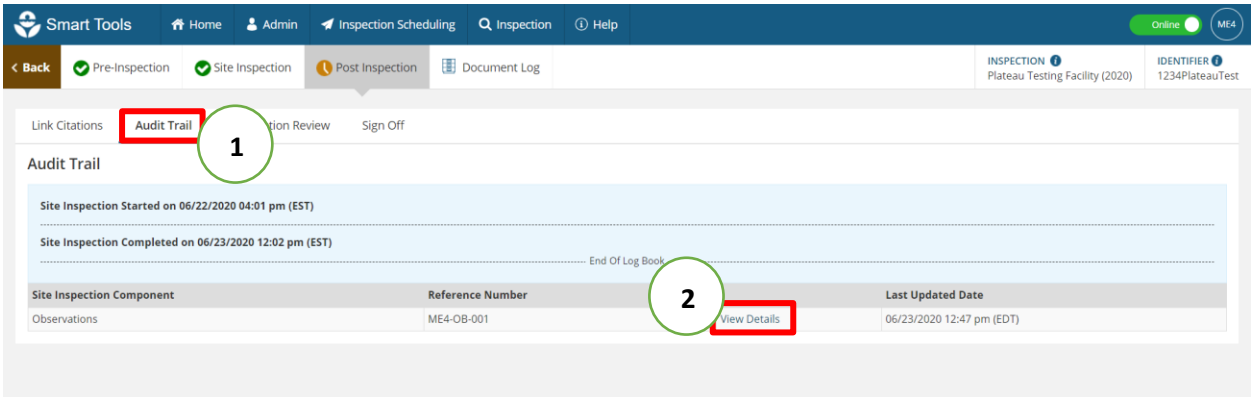


Audit Trail

The audit trail captures all changes to the inspection after syncing the data to the server. This is designed to mimic the current process used by Inspectors, by crossing out original content with a single line so that it is still visible.

Steps:

1. Click **Audit Trail** in the Post Inspection page
2. Additional details of what was specifically changed can be seen after clicking **View Details.**



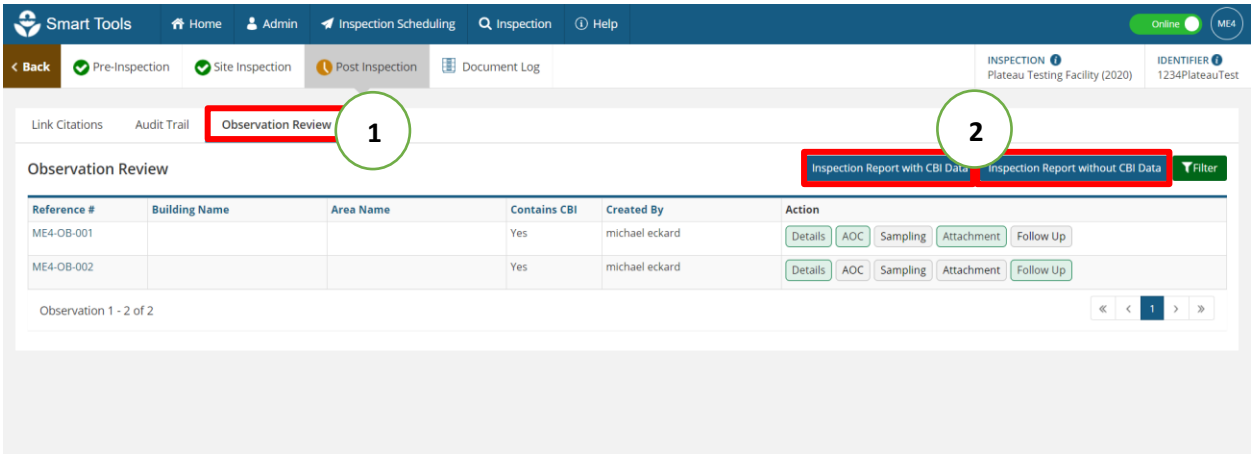
Observation Review

User can generate the draft Inspection Report either with or without CBI. Users without CBI access or who have not been included on this inspection will not be able to see the CBI version of the Inspection Report. The Lead Inspector can download the Inspection Report in either PDF or Word for review or approval. Other Inspectors can only download in PDF to maintain version control.

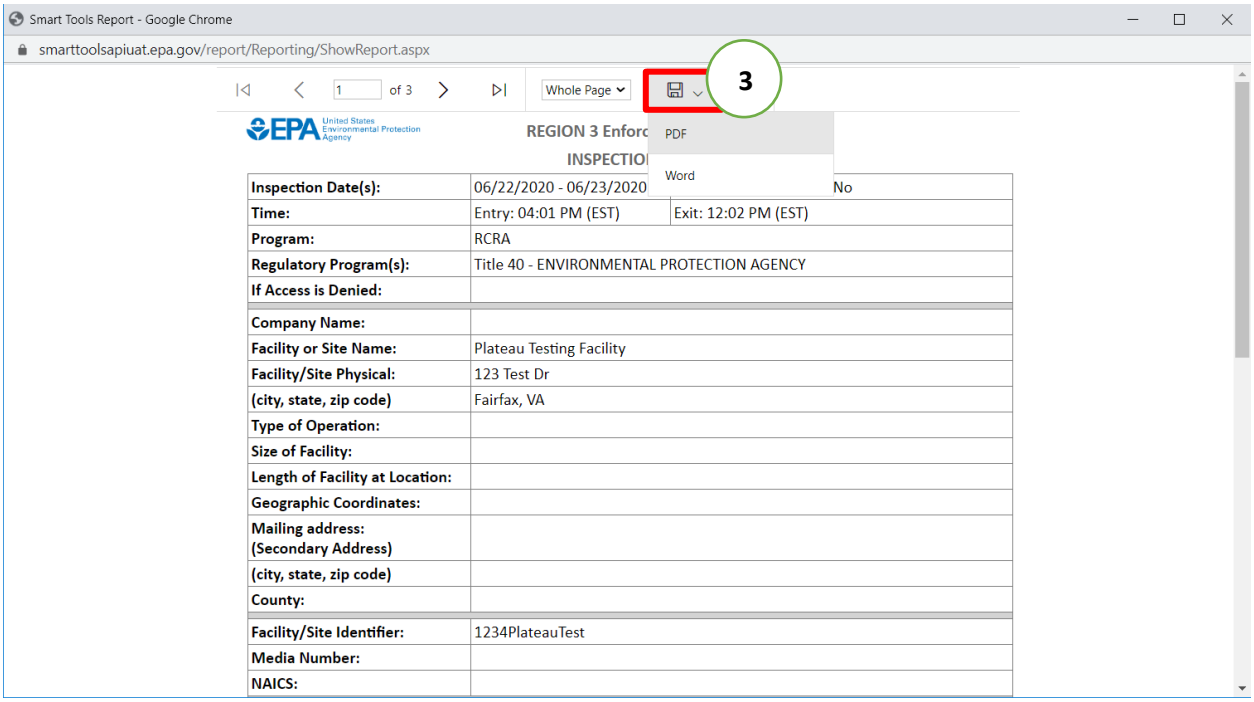
Steps:

1. Click on **Observation Review** in the Post Inspection page
2. Click either **Inspection Report with CBI Data** or **Inspection Report without CBI Data**

> **Note:** Smart Tools does not limit how many times a user can generate an Inspection Report. Only the Lead Inspector can generate an Inspection Report in Word in order to share and edit it outside of Smart Tools. This helps with version control for the Lead Inspector.



3. Click **Save** and select either PDF or Word and save it to the preferred destination



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Sign Off

Currently, the Inspection Report that Smart Tools generates will need to be printed in order to be signed. Once signed by both the Lead Inspector and Supervisor, the Inspection Report can be uploaded back into Smart Tools to remain as an official record.

Steps:

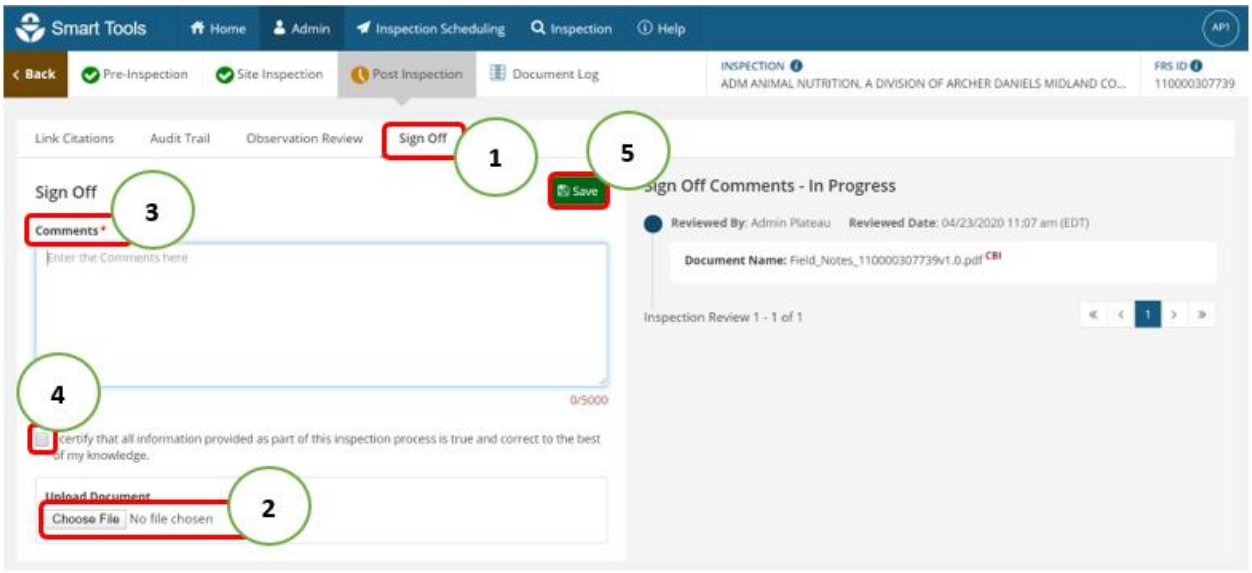
1. Click **Sign Off** in the Post Inspection page
2. Upload the Inspection Report by clicking on **Choose File**

> **Note:** Only one Inspection Report can be uploaded.

3. Insert final comments in the **Comments** text box
4. Click the check box next to the "I certify…"

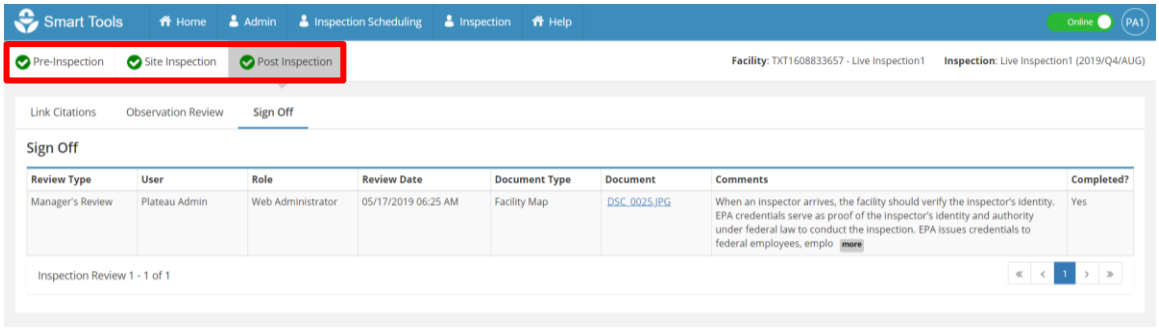
> **Note:** Either the Lead Inspector or Supervisor can complete the inspection with these steps. As soon as they click the check box and hit save, the inspection will be locked.

5. Click **Save**



After Final Signoff

Following the final signoff, the Inspection will become read only.

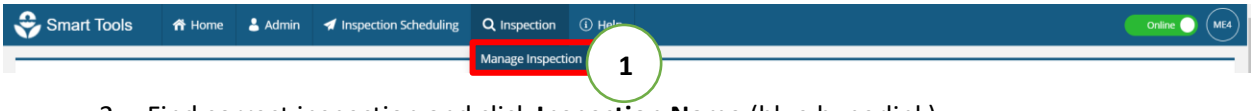


Document Log

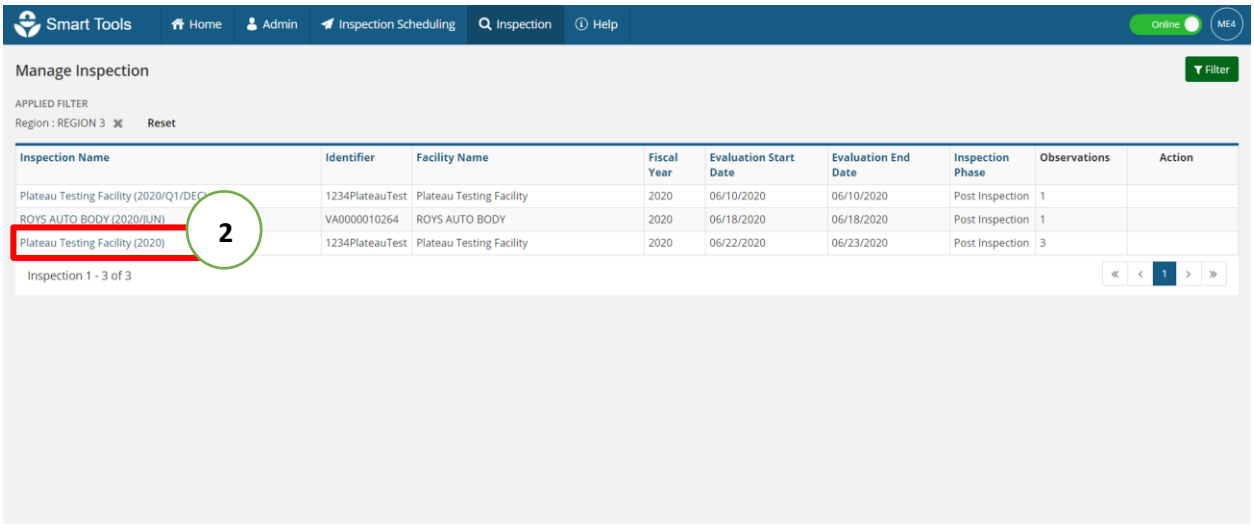
The Document Log feature consolidates all documents that were uploaded during the inspection process. This tab remains open even after the inspection is complete and the inspection report is signed and uploaded. This allows users to upload additional documents that may come in after the Inspection Report is finalized.

Steps:

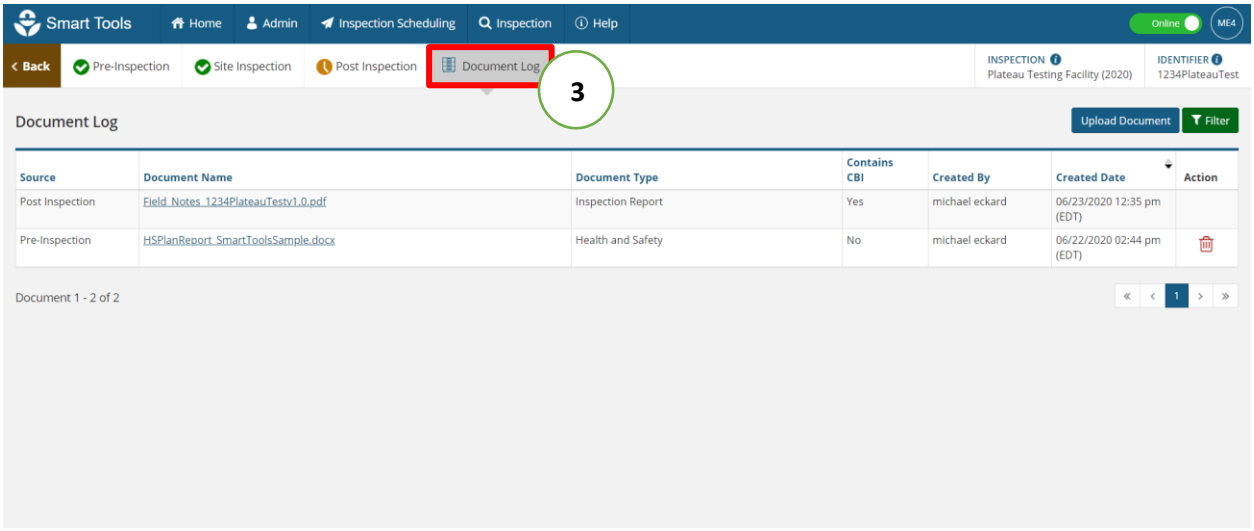
1. Under Inspection click **Manage Inspection**



2. Find correct inspection and click **Inspection Name** (blue hyperlink)

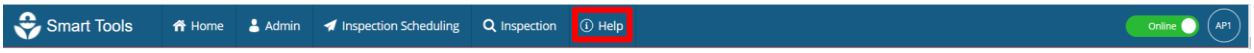


3. Click **Document Log**



Help

The HELP feature on the main navigation bar will contain User Guides and Smart Tools Help Desk contact information to assist with using Smart Tools.



Smart Tools System Administrators User Guide

If possible, use Google Chrome for all Smart Tools related activities

General Information

Designated Region and State Smart Tools System Administrators will be given their own accounts in Smart Tools. For login instruction questions, please visit the **Smart Tools Login Instructions** for assistance or reach out to the Smart Tools Help Desk.

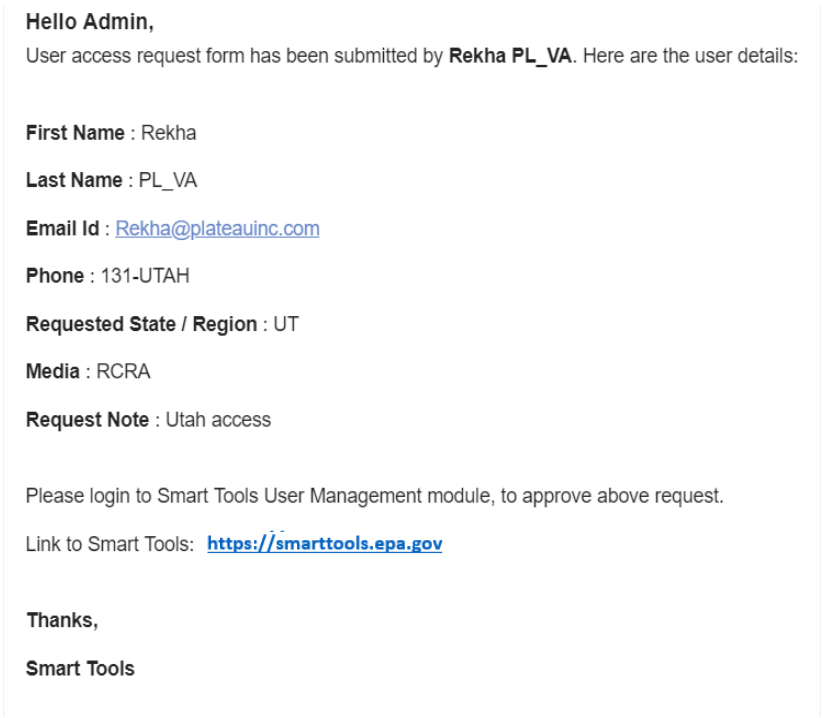
Smart Tools System Administrators are responsible for granting and revoking access to the Smart Tools application and assigning roles to new Smart Tools users inside of their respective Region or States.

For a list of Smart Tools System Administrators see the **Smart Tools System Administrators** list (last updated June 9, 2020)

Approving New Users

New users to Smart Tools will request access through the Smart Tools application. New Smart Tools users will fill in their respective Region or State as part of the request process. Once their form is submitted, the system will send an Email notification to their Smart Tools System Administrator. Follow the steps below to grant them access and to manage their account:

1. An Email notification, autogenerated by the requester, of a new Smart Tools request is received (Example provided below):



Hello Admin,

User access request form has been submitted by **Rekha PL_VA**. Here are the user details:

First Name : Rekha

Last Name : PL_VA

Email Id : Rekha@plateauinc.com

Phone : 131-UTAH

Requested State / Region : UT

Media : RCRA

Request Note : Utah access

Please login to Smart Tools User Management module, to approve above request.

Link to Smart Tools: **https://smarttools.epa.gov**

Thanks,

Smart Tools

SMART TOOLS HELP DESK

(703) 651-6737

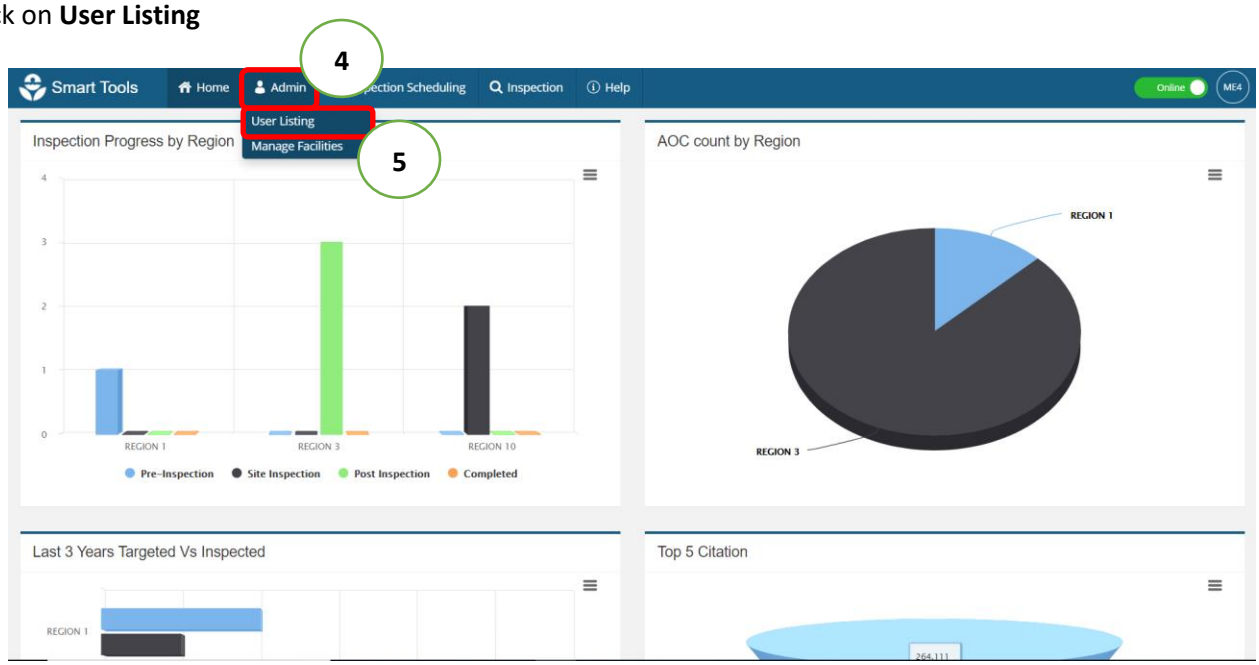
Smarttoolshelpdesk@plateauinc.com

2. Click on **Link to Smart Tools:** https://smarttools.epa.gov

3. Log into Smart Tools

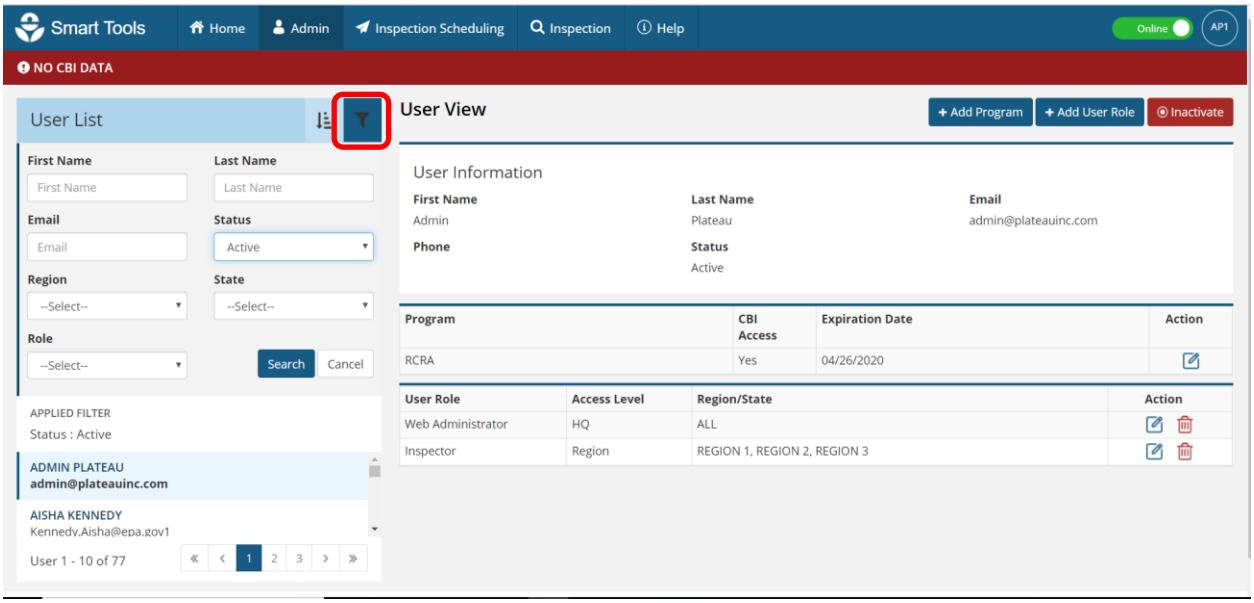
4. Click on **Admin**

5. Click on **User Listing**



6. Click on the **Filter** icon

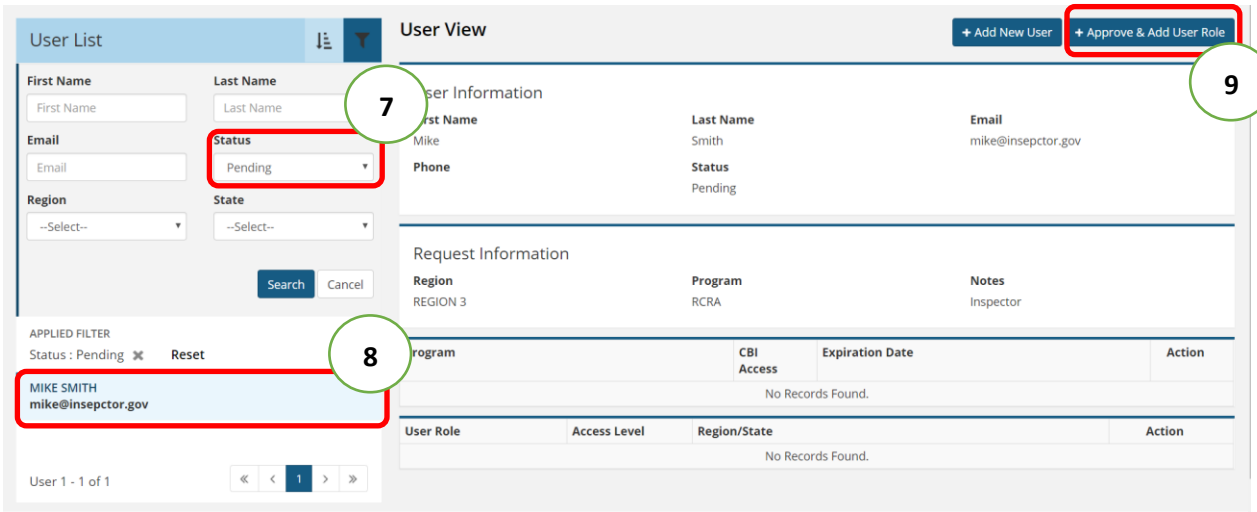
Note: The most recent Applied Filter will remain until it is reset, or the search criteria is changed



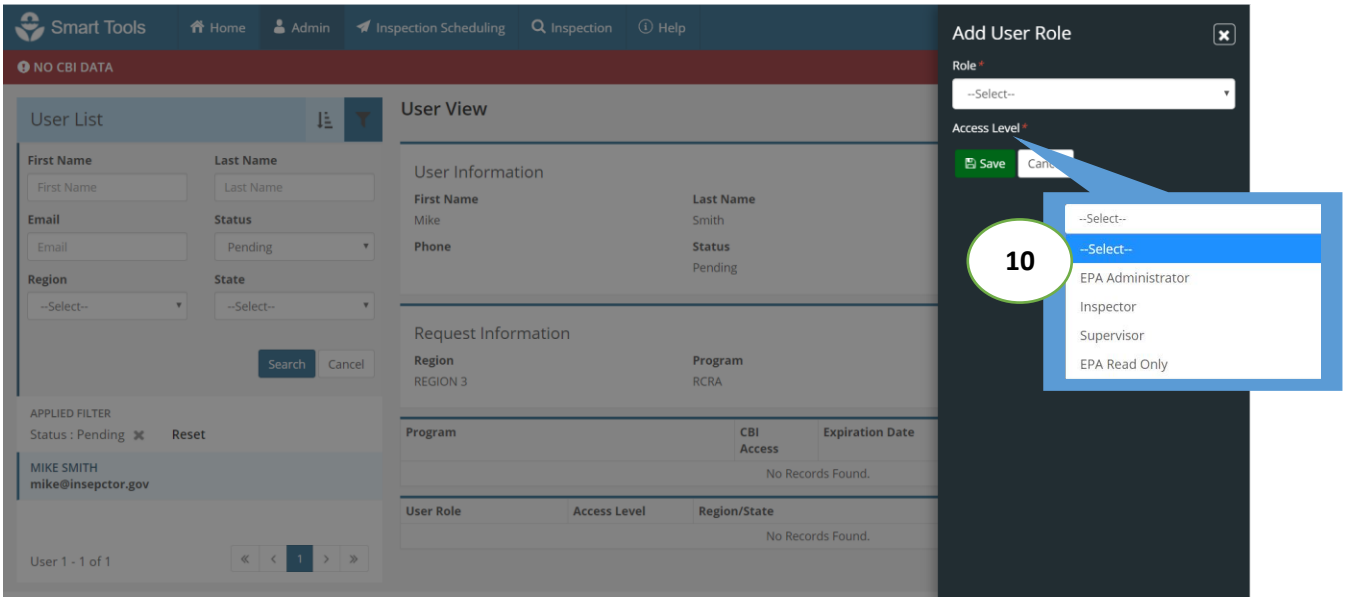
7. Under the **Status** dropdown, select **Pending**. All users in the Smart Tools System Administrator's Region or State that are pending will appear in the list

8. Find pending user

9. If known by the Smart Tools System Administrator, select **Approve & Add User Role**

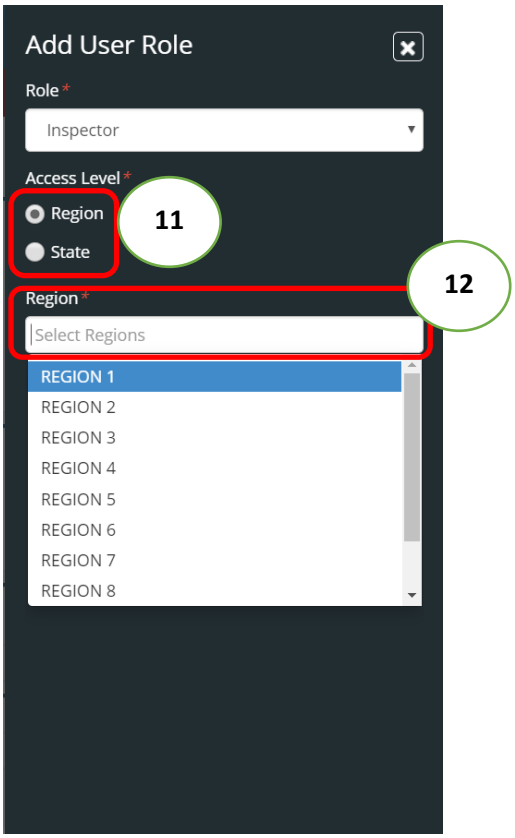


10. Select the correct user role:



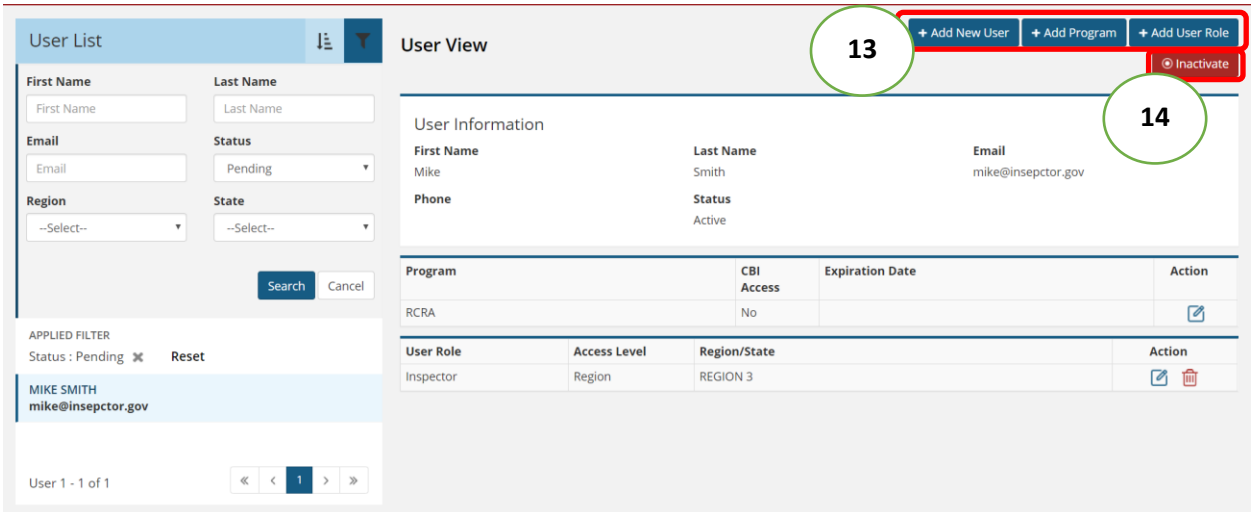
11. Select **Region** or **State**

12. Enter specific **Region(s)** or **State(s)** for access level and click **Save**

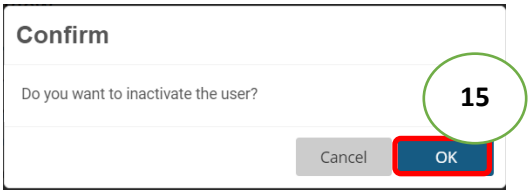


13. Once approved, the user's information will be updated in their profile. Additional Programs and User Roles can be granted by the Smart Tools System Administrator, as necessary

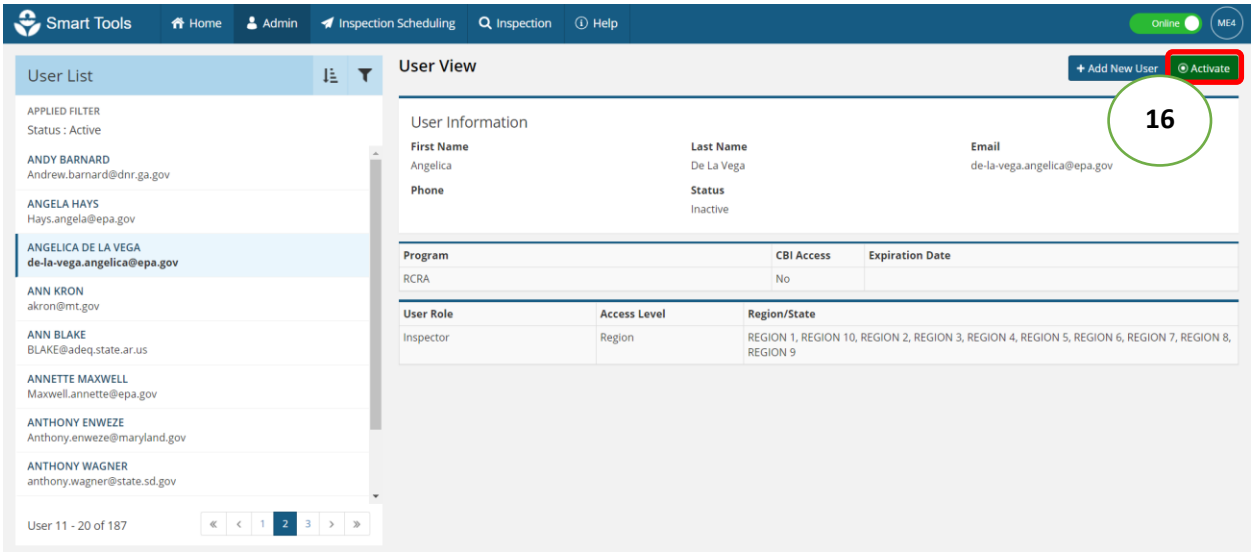
14. If a user no longer needs access to the Smart Tools application, click **Inactivate**



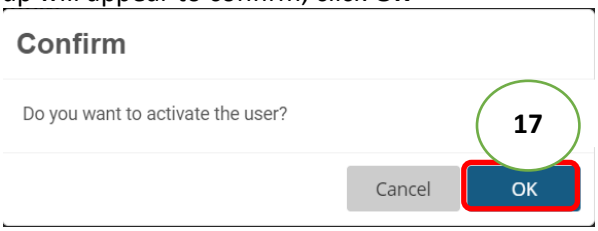
15. Popup will appear to confirm, click **OK**



16. If a user, after being made inactive, needs to be reactivated click **Activate** in the user's profile



17. Popup will appear to confirm, click **OK**

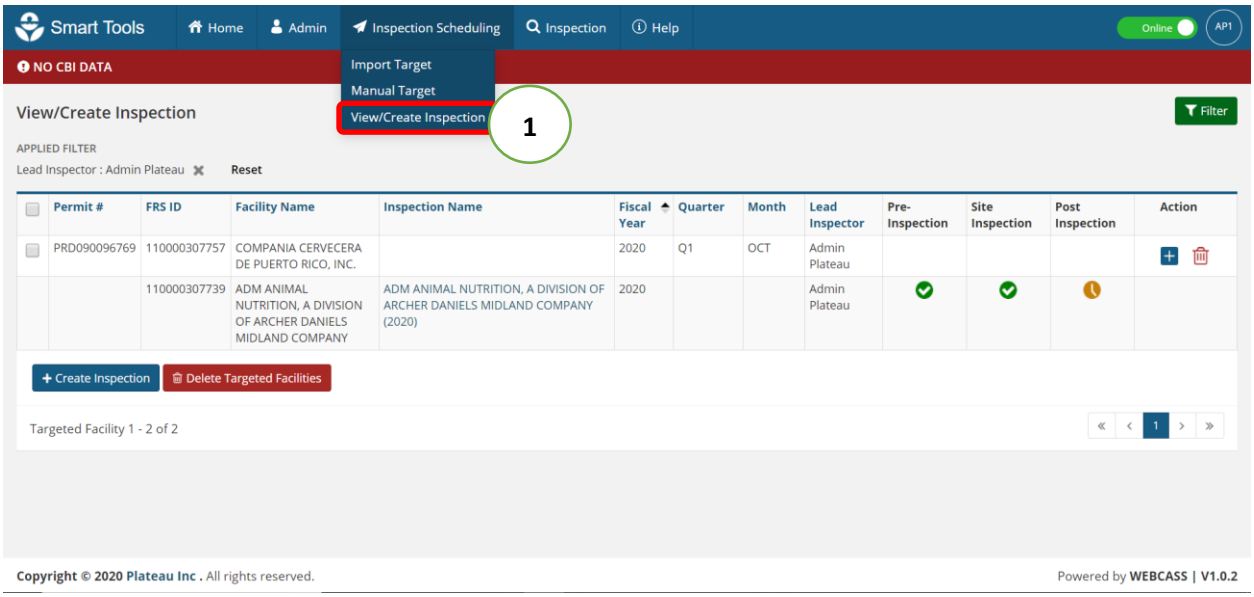


Note: A user should send a request to their respective Smart Tools System Admin to request to be reactivated in Smart Tools.

Viewing Inspections

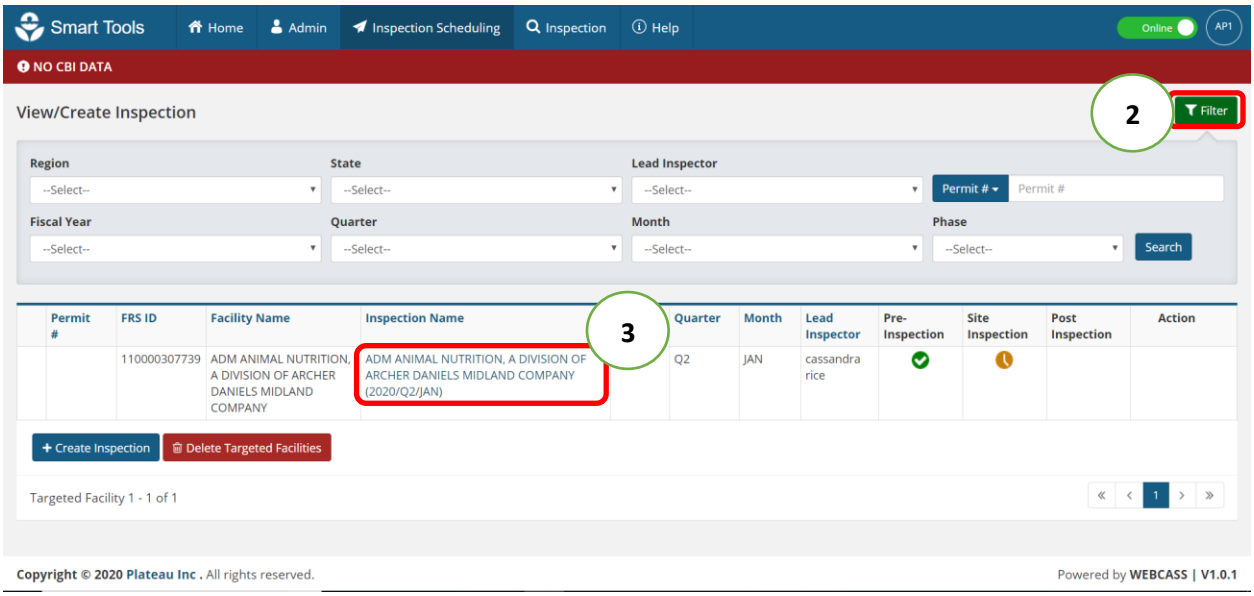
Smart Tools System Administrators can view the inspections of their respective inspectors but cannot change the content.

1. Under **Inspection Scheduling,** select **View/Create Inspection**



2. **Filter** through the dashboard to view the status inspections
3. Click on the **Inspection Name** hyperlink to go into an individual inspection to view inspection content:

Note: The most recent Applied Filter will remain until it is reset, or the search criteria is changed



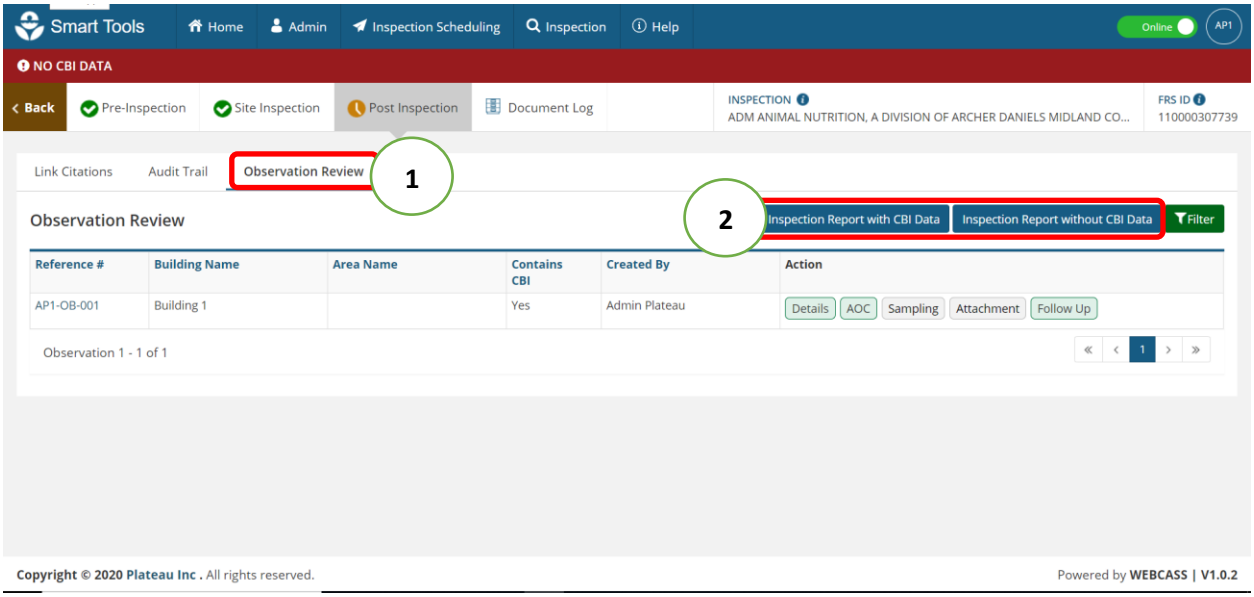
Note: An Administrator can browse the Pre-Inspection, Site-Inspection, and Post-Inspection tabs to view content but cannot add, edit, or delete information.

Viewing Inspection Report

Smart Tools System Administrators can generate the Inspection Report either with or without CBI. Users without CBI access or who have not been included on this inspection will not be able to see the CBI version of the Inspection Report. If needed, Smart Tools System Administrators can download the Inspection Report in a PDF format.

Steps:

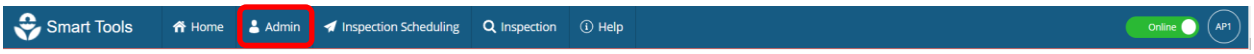
1. Select **Observation Review** on the **Post Inspection** page
2. Click on the Inspection Report buttons to generate an Inspection Report



Smart Tools System Admin Role

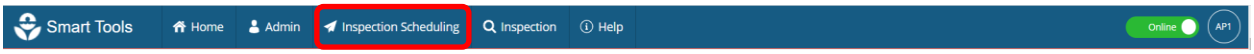
The Smart Tools System Admin role, for both internal and external users, has permissions to access the following Smart Tools features:

Admin Tab



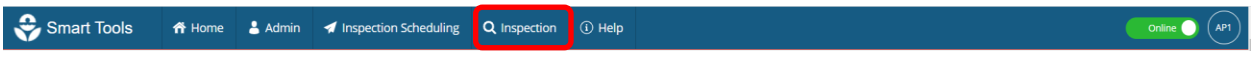
- Can view all Smart Tools users
- Can Add & Approve Roles (First Time) for new user who comes under their region
- Can view all Facilities, Permits & Buildings under each facility
- Can add / edit / delete Facility within their region
- Can delete a Temporary Facility created in the Smart Tools system for his/her region. System won't allow user to delete a facility that comes from RCRAinfo/ECHO
- Can Add / Edit / Delete a facility permit under the region allocated

Inspection Scheduling Tab



- Can view all targeted facilities in their region

Inspection Tab

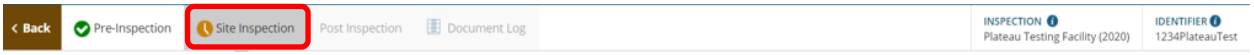


- View all inspections in their region

Pre-Inspection Tab

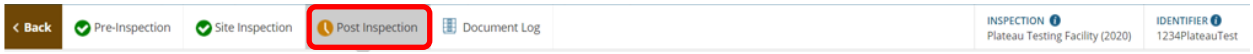
- Can view all Smart Tools pre-inspection data in read-only mode
- Can download Health & Safety Plans

Site Inspection Tab



- Can view all Smart Tools site-inspection data in read only mode

Post Inspection Tab



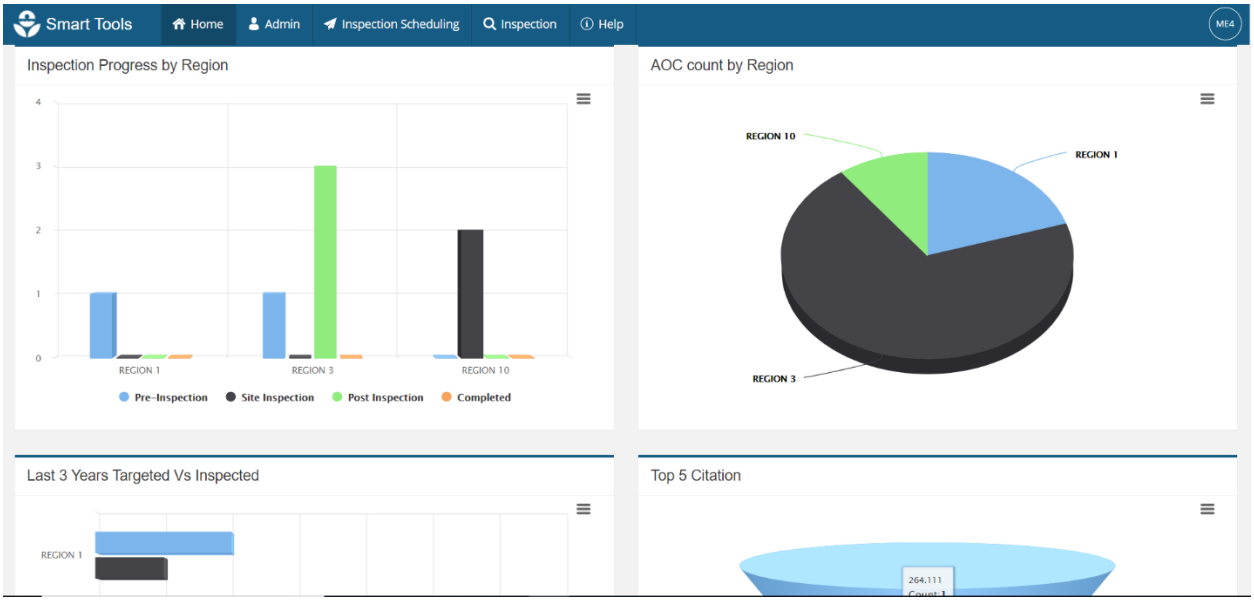
- Can view all Smart Tools post inspection data, except Audit Trail, in read only mode
- **Cannot** download/View Inspection Reports
- Can view/download all Non-CBI documents in document log

Smart Tools Supervisor User Guide

If possible, use Google Chrome for all Smart Tools related activities

Dashboard

Once logged into Smart Tools, Supervisors are presented with a high-level dashboard displaying four different metrics relating to their Region. These metrics populate, in real time, as inspectors move through the inspection process and capture data.



View Users

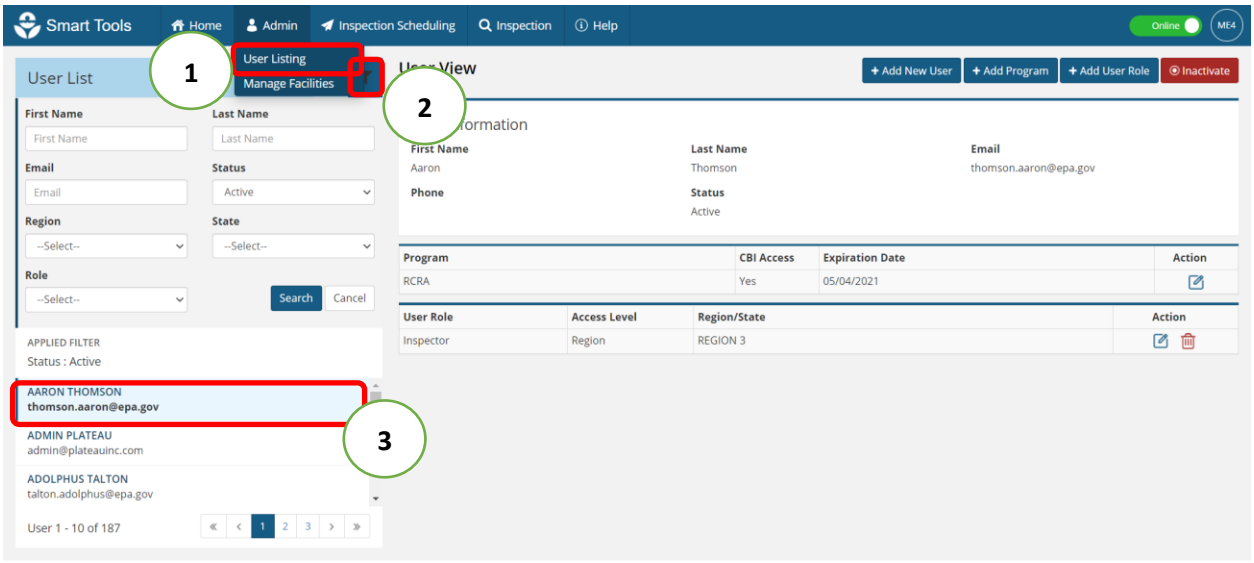
Supervisors can view user information (e.g., CBI clearance) to ensure it is up to date and accurate inside of Smart Tools, so that Inspectors have all the necessary permissions to successfully carry out their assignments.

1. Select **User Listing** under the **Admin** tab

2. If needed, select **Filter** to locate a specific user or set of users

> **Note:** The most recent Applied Filter will remain until it is reset, or the search criteria is changed

3. Select user and view user information:



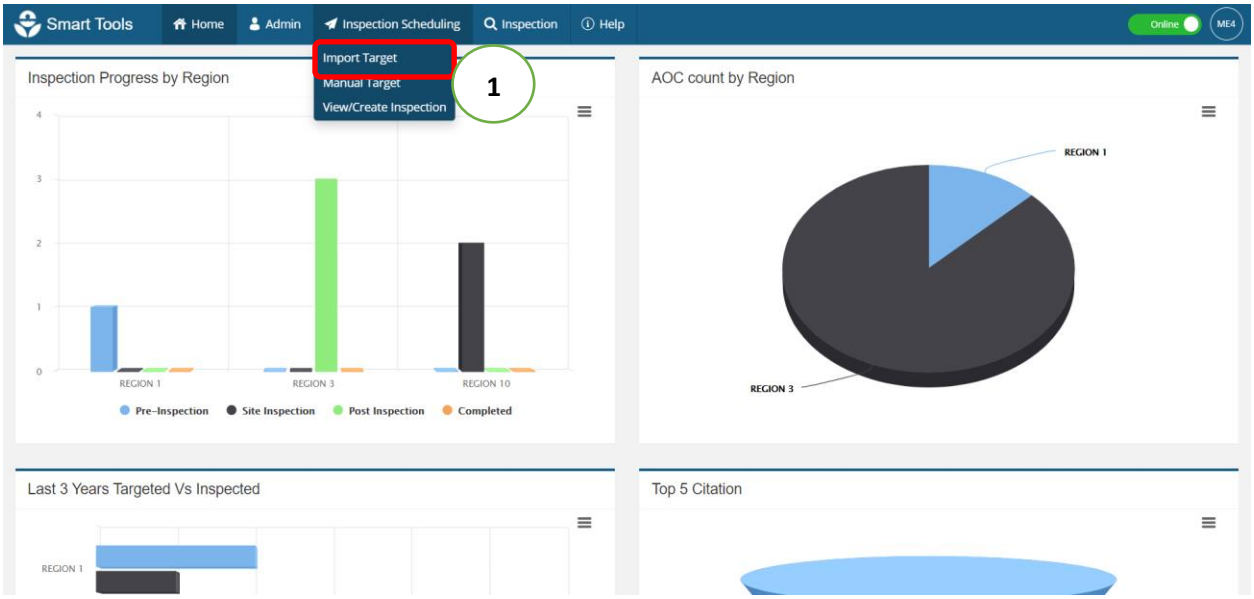
Note: Contact the Region or State Smart Tools Administrator if information needs to be updated.

Import Targeted Facility List

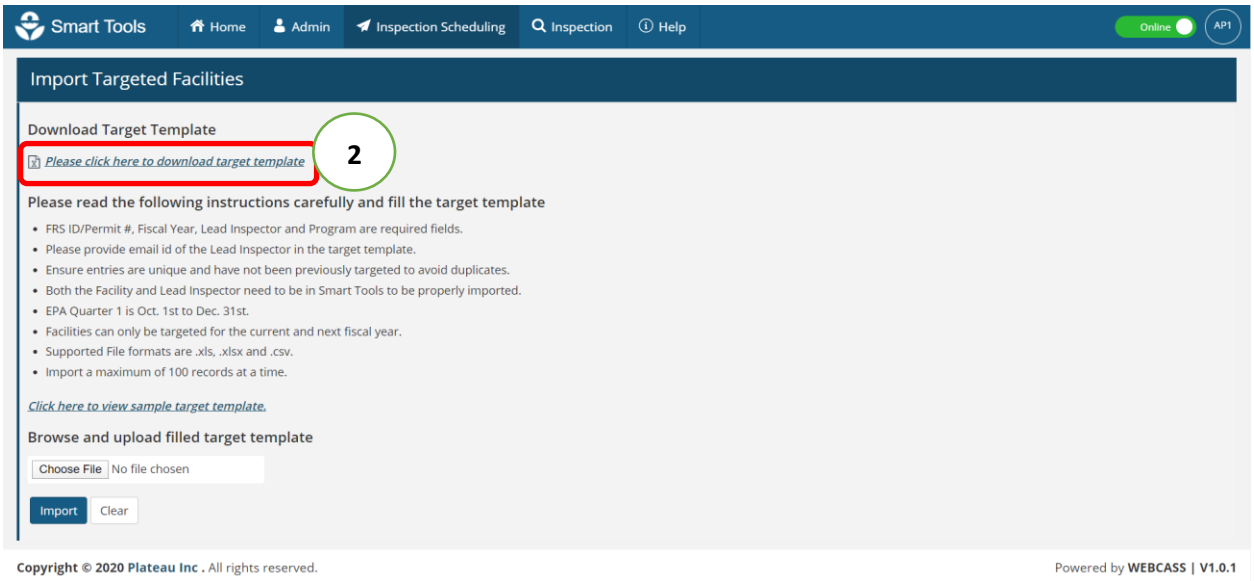
Supervisors can upload the inspections scheduled for an upcoming fiscal year by uploading an Excel template provided in Smart Tools.

> **Note:** Inspectors have the ability to schedule inspections on a case by case basis using the **Manual Target** tab in Smart Tools.

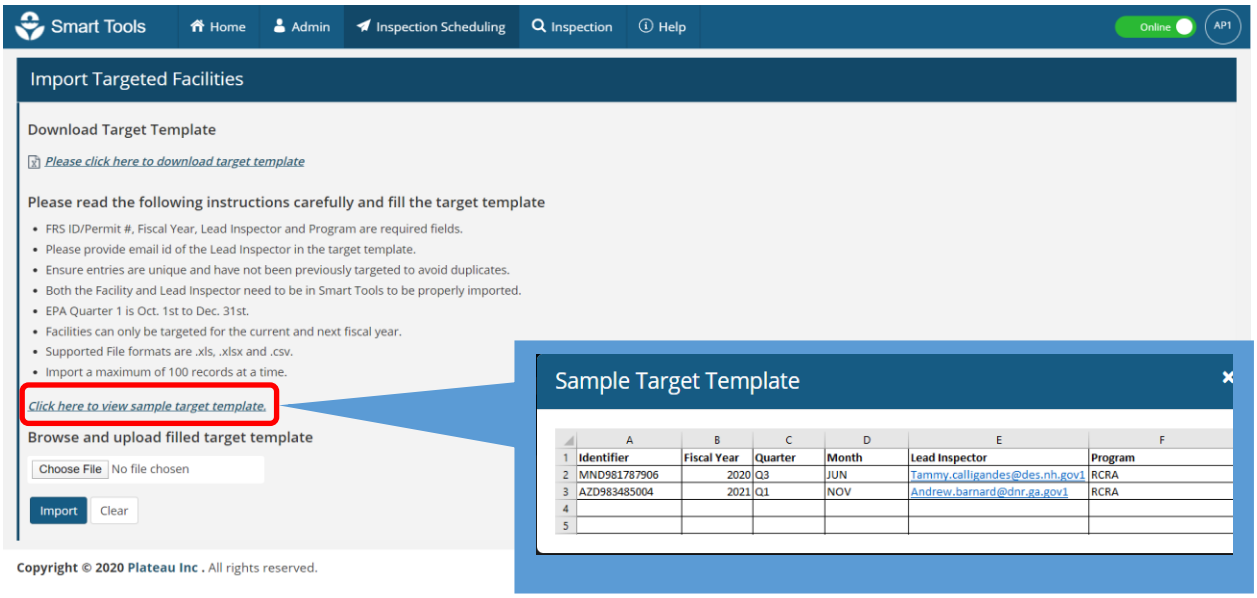
1. Navigate to the **Import Target** screen:



2. Download the Excel template provided in Smart Tools:

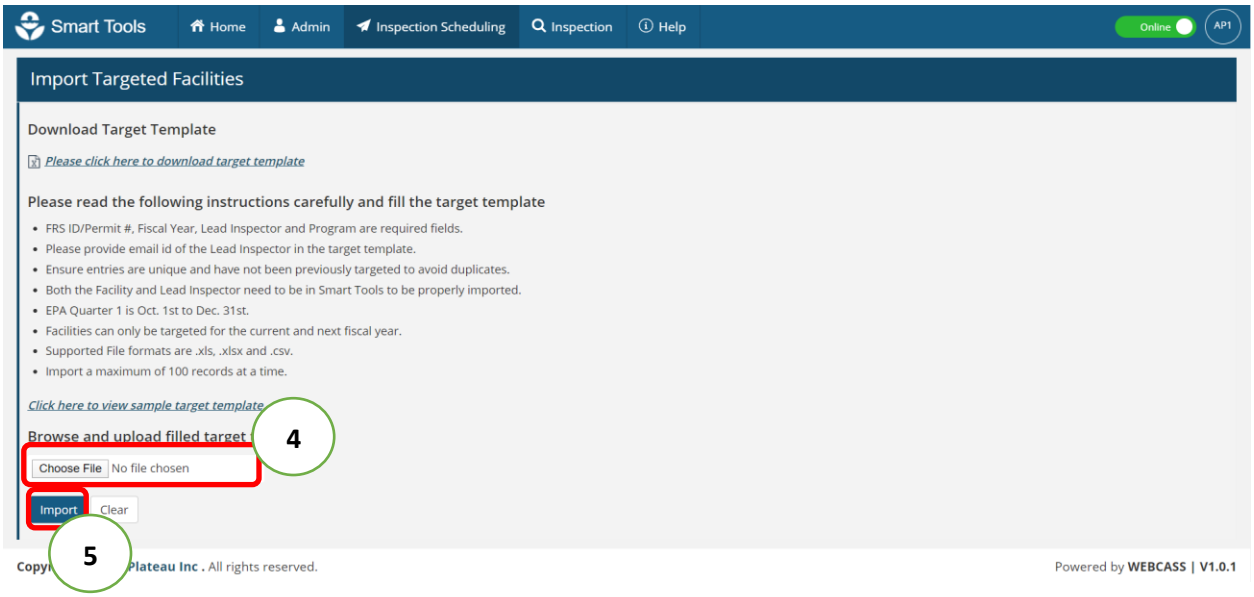


3. Fill out the Excel template. **Identifier** (Facility ID or Name)**, Fiscal Year**, **Lead Inspector**, and **Program** are REQUIRED. Example template provided:



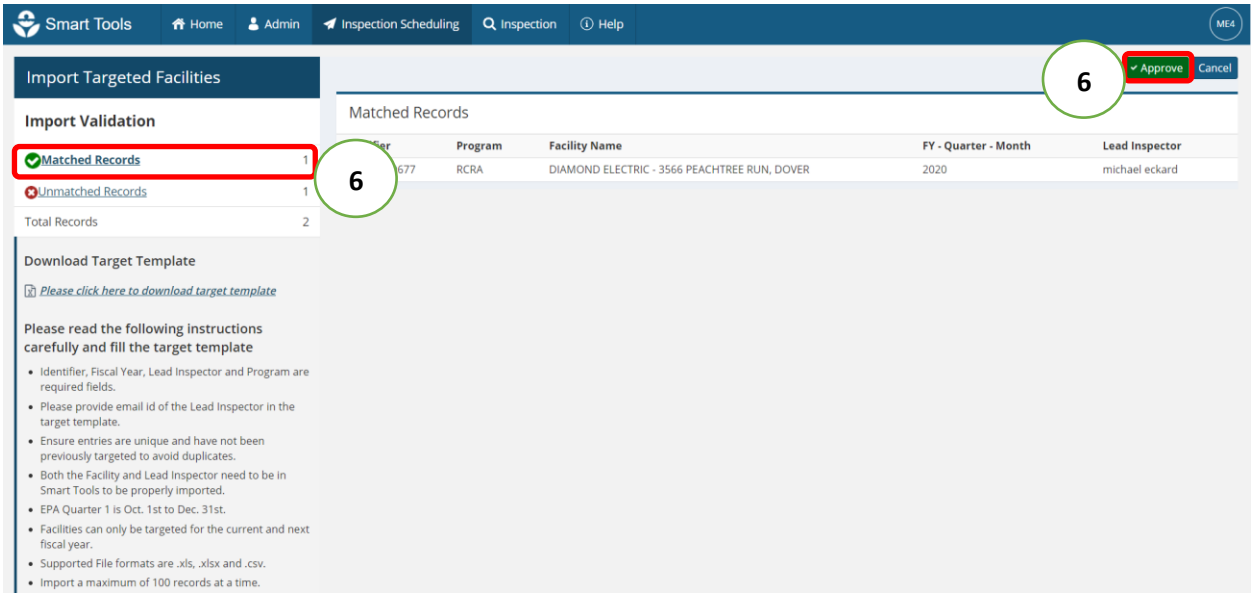
4. Choose the Excel file from desktop

5. Click **Import**:

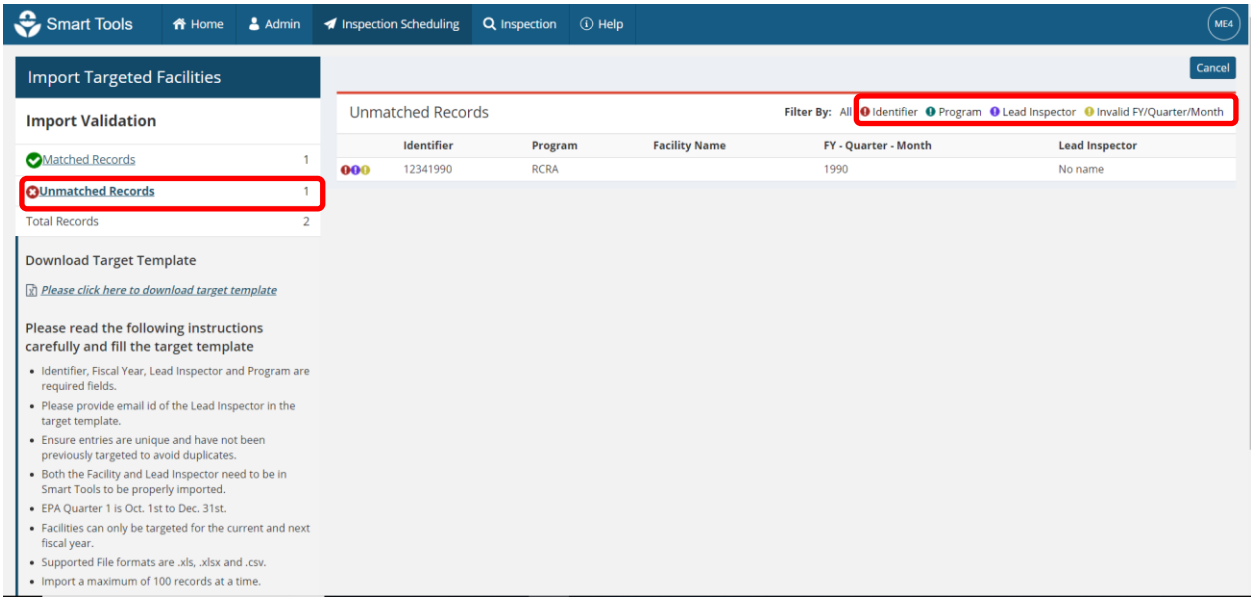


6. Smart Tools will validate the information uploaded in the Excel template ensuring the facility exists in Smart Tools, the Fiscal Year is valid (not a past Year), and that the Lead Inspector exists in Smart Tools. Matched and Unmatched Records will be shown.

Matched records can be immediately approved and will be scheduled in Smart Tools for inspectors:



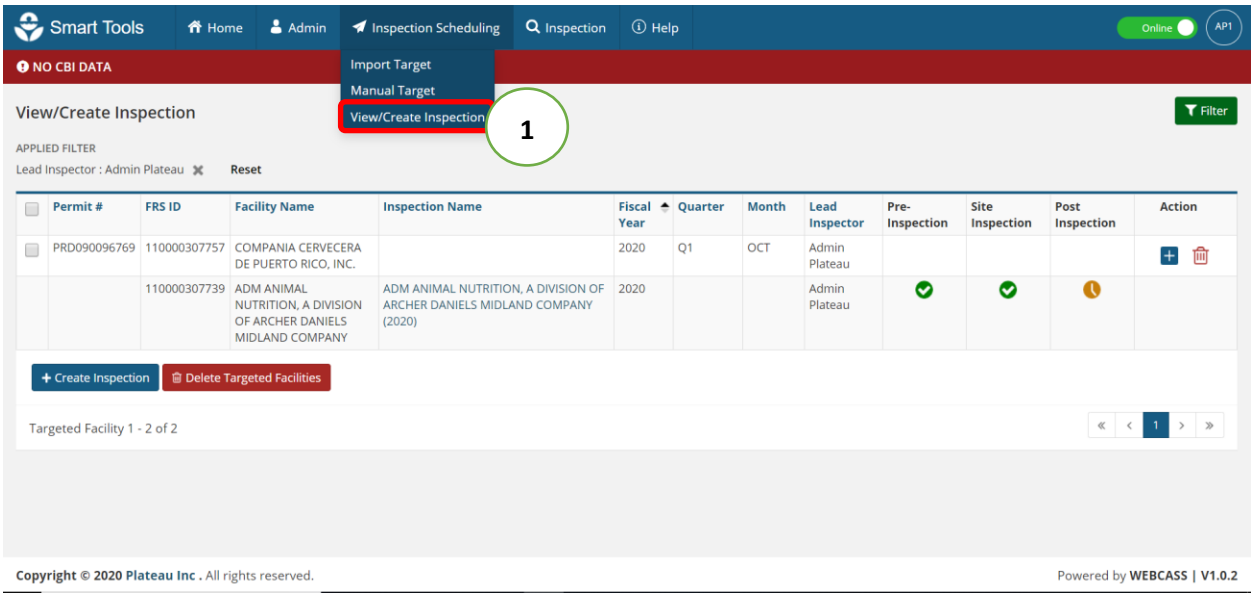
Unmatched records will be listed separately. There will be an icon indicating the reason it was unmatched. The supervisor will need to update the template and re-upload into Smart Tools in order to approve:



Deleting Scheduled Inspections

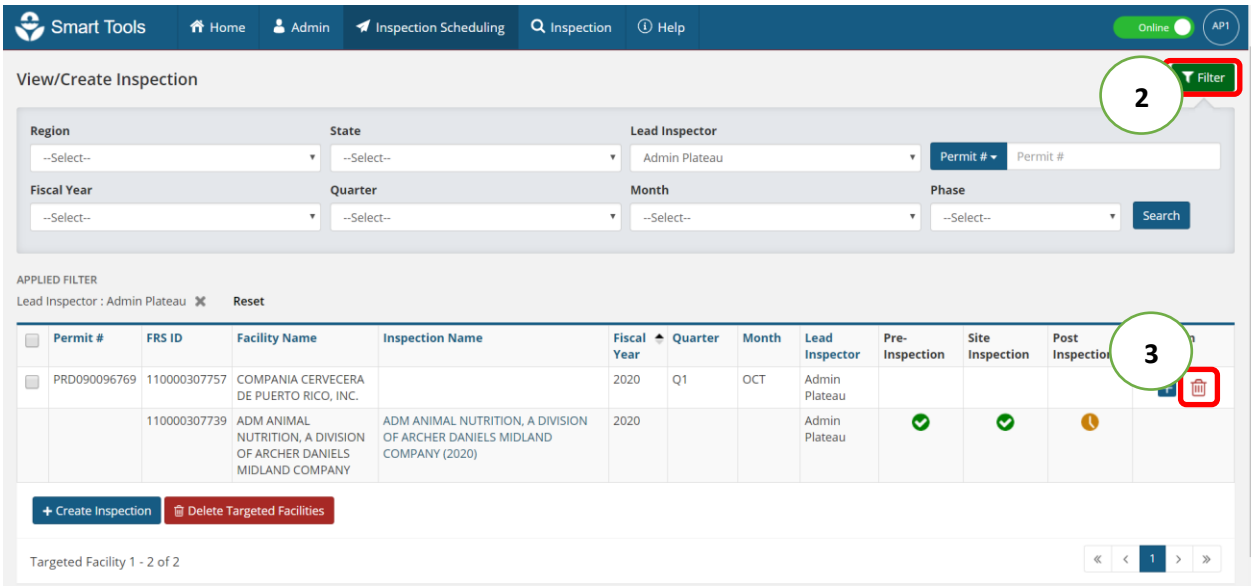
In the event a Targeted Facility was Imported into Smart Tools and is no longer to be inspected, a Supervisor can delete the scheduled inspection from Smart Tools.

1. Navigate to **View/Create Inspection** tab:



2. Use the **Filter** to help locate the correct Targeted Facility
3. Click on the **Red Trash can** under the Action column:

Note: The most recent Applied Filter will remain until it is reset, or the search criteria is changed

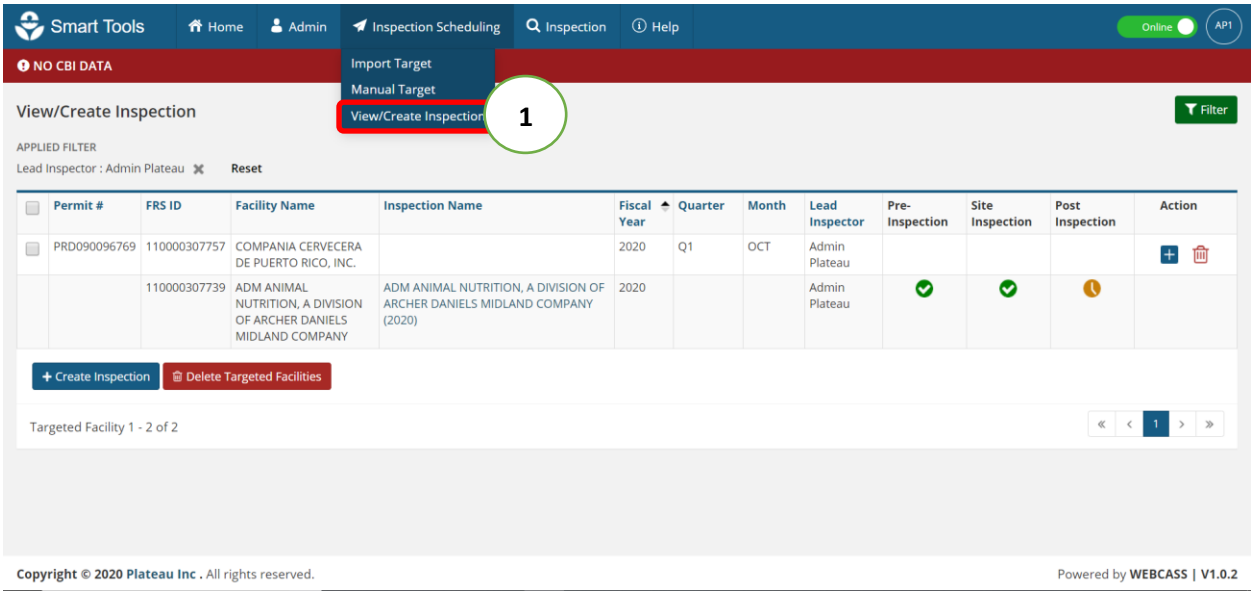


Viewing Inspections

Manager and Supervisors can view the status of inspections by their respective inspectors

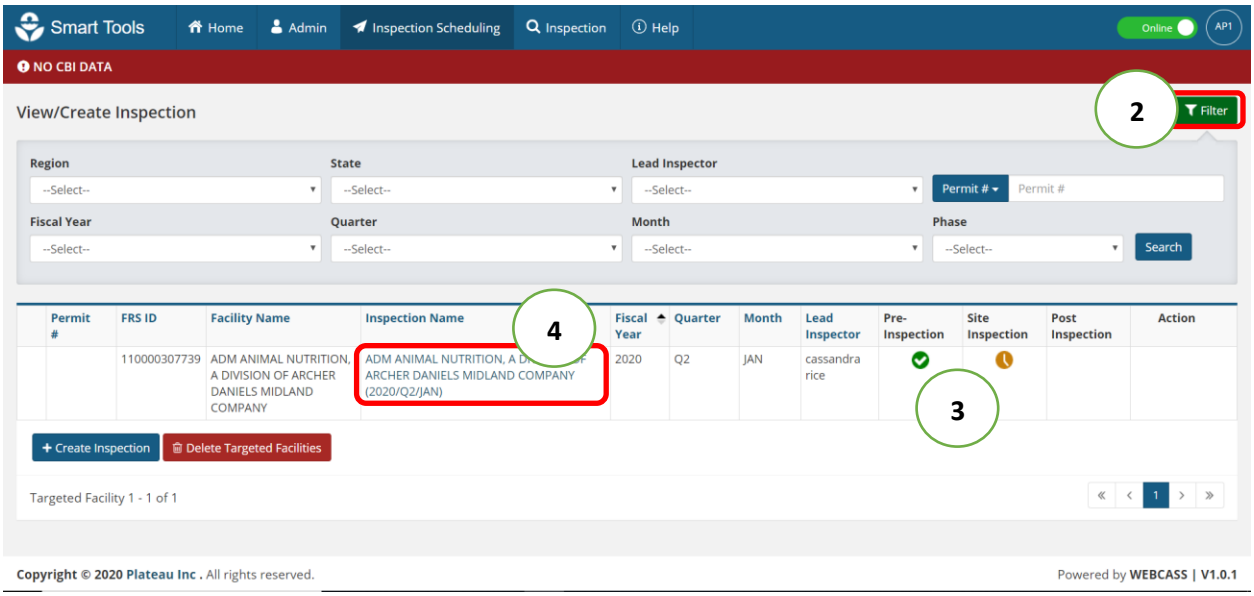
Steps:

1. Under **Inspection Scheduling**, select **View/Create Inspection** tab:



2. **Filter** through the dashboard
3. View the status of inspections. Each inspection has a status associated with it. This is indicated by the icons found under the Pre-Inspection, Site Inspection, and Post Inspection headings. The column will be blank indicating that phase(s) is not yet started, contain an icon indicating that phase is in progress, or contain an icon indicating that phase(s) is complete
4. Click on the **Inspection Name** hyperlink to go into an individual inspection to view inspection content

Note: The most recent Applied Filter will remain until it is reset, or the search criteria is changed



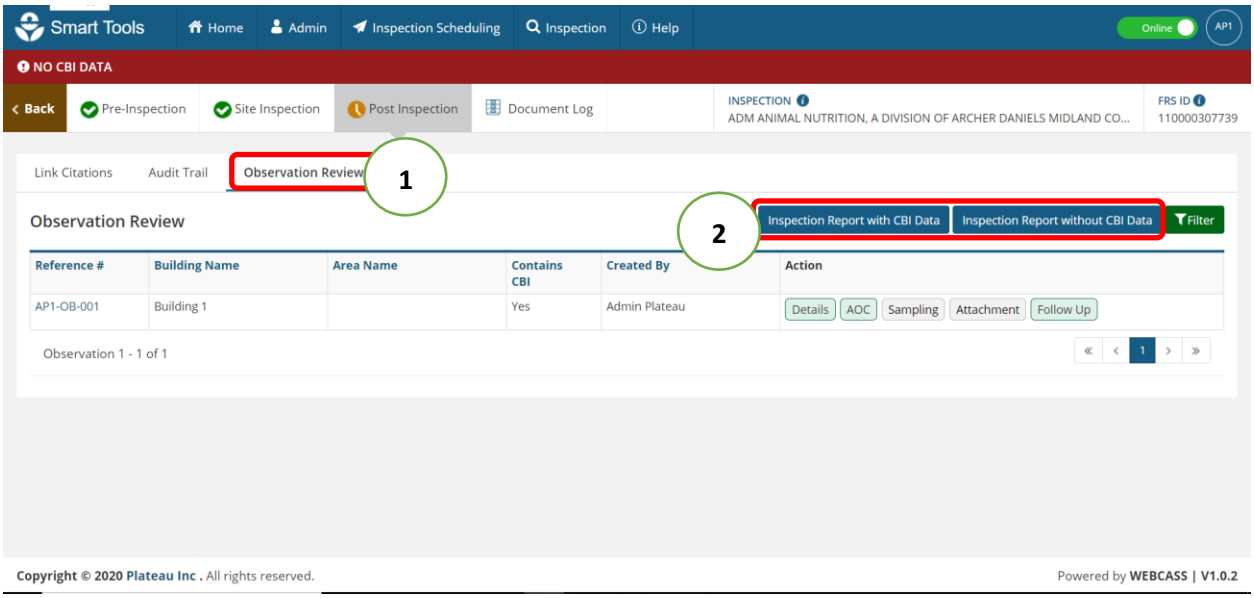
Note: A Supervisor can browse the Pre-Inspection, Site-Inspection, and Post-Inspection tabs to view content but cannot add, edit, or delete information except as described below.

Viewing Inspection Report

The lead inspector will generate the draft inspection report from Smart Tools for peer and/or management review. In the event that a Supervisor wants to see the draft inspection report, they can do so by generating it with or without CBI. Users without CBI access or who have not been included on this inspection will not be able to see the CBI version of the Inspection Report. For version control, the Supervisors can only download the Inspection Report in a PDF format. The Lead Inspector can provide a copy of the Inspection Report in Word to his/her supervisor.

Steps:

1. Select the **Observation Review** tab, on the **Post Inspection** page
2. Click on the Inspection Report buttons to generate an Inspection Report:



Inspection Sign Off

Currently, the Inspection Report that Smart Tools generates will need to be printed in order to be signed. Once signed by both the Lead Inspector and Supervisor, the Inspection Report can be uploaded, as a PDF file, back into Smart Tools to maintain an official record.

Steps:

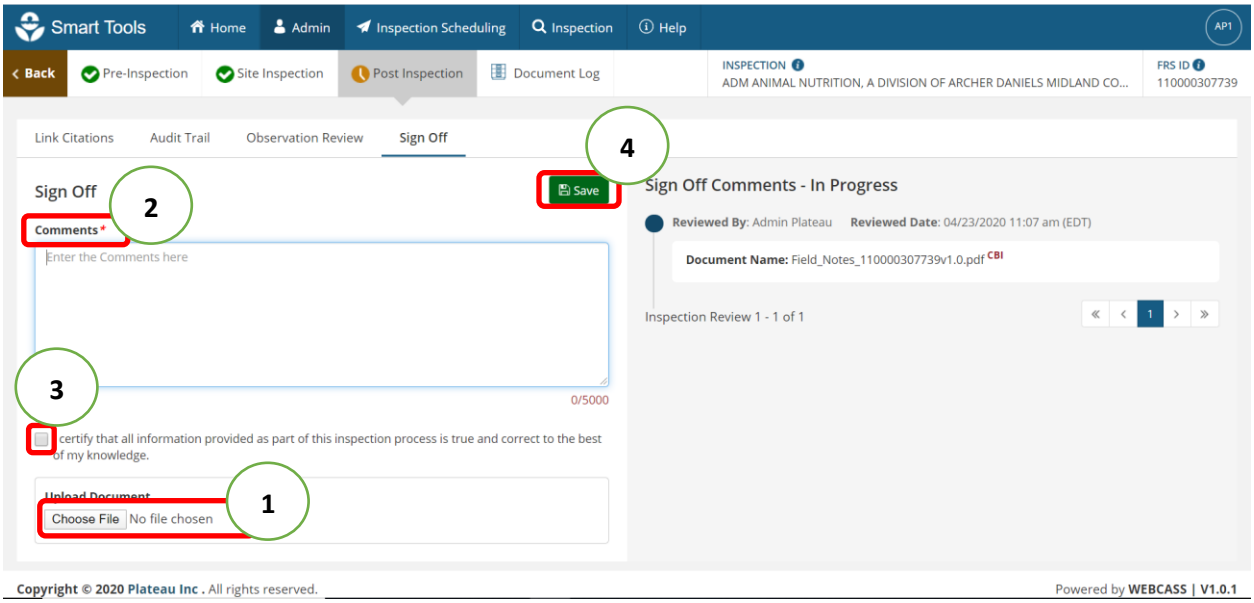
1. Upload the Inspection Report by clicking on **Choose File**

2. Insert final comments in the **Comments** text box

3. Click the check box next to the "I certify…"

> **Note:** Either the Lead Inspector or Supervisor can complete the inspection with these steps. As soon as they click the check box and hit save, the inspection will be locked.

4. Click **Save**

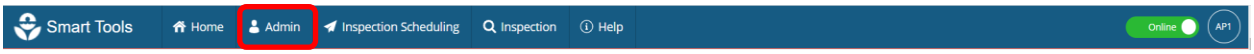


> **Note:** As soon as they click the check box and hit save, the inspection will be locked.

Smart Tools Supervisor Role

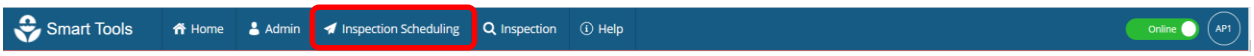
The Supervisor role has permissions to access the following Smart Tools features:

Admin Tab



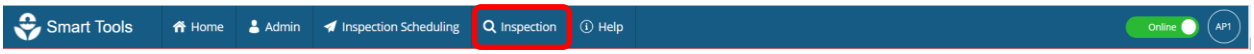
- Can view all Smart Tools users
- Can view all Facilities, Permits, & Buildings under each facility inspected using Smart Tools.
- Can Add/Edit Facilities under region/state allocated
- Can Add/Permits under region/state allocated

Inspection Scheduling Tab



- Can do a Bulk Import of planned inspection sites
- Can do Ad hoc/Manual Targeting of an individual target or a group of targets
- Can view all targeted facilities in their region/state
- Can delete a facility from a Target list

Inspection Tab

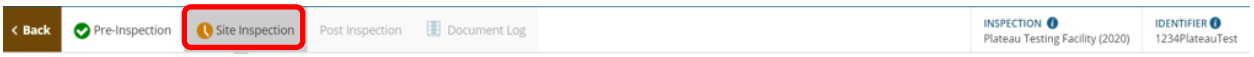


- View all inspections within their region/state
- Can delete inspections under their state/region if there are no observations tied to that inspection

Pre-Inspection Tab

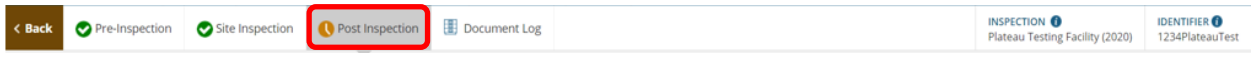
- Can view all Smart Tools pre-inspection data in read only mode.
- Can download Health & Safety Plans

Site Inspection Tab



- Can view all Smart Tools site-inspection data in read-only mode.

Post Inspection Tab



- Can view post inspection data
- Can download/View Inspection Report
- Can review inspection

SMART TOOLS HELP DESK

(703) 651-6737

Smarttoolshelpdesk@plateauinc.com

- Can sign-off and upload final inspection report
- Can view and upload any documents in document log

Smart Tools Sandbox Environment

A Smart Tools Sandbox Environment has been specifically created to allow users to test and practice the roles and permissions assigned to them. The Sandbox Environment is designed to mimic the Production Environment to give users the true experience before conducting their first live inspection.

Note: Please ensure to use the right URL. The practice Smart Tools URL will display the banner below stating, “NO CBI DATA – SANDBOX ENVIRONMENT.” This means that although it is a fully functioning application, it is not hosted in an environment that can safely protect CBI data.

Sandbox Environment: https://epasmarttools.plateauinc.com/smarttools/

To have an account created, contact the Smart Tools Help Desk at the information below:

SMART TOOLS HELP DESK

(703) 651-6737

Smarttoolshelpdesk@plateauinc.com

SMART TOOLS HELP DESK

(703) 651-6737

Smarttoolshelpdesk@plateauinc.com

Smart Tools Hardware and Touch Keyboard Tips and Tricks

Hardware

EPA and state Inspectors jointly defined the following requirements for mobile computing devices for use conducting field inspections. Currently the Panasonic CF-20 device best meets these requirements. As technology and inspector requirements evolve, EPA and states will evaluate newer mobile devices against the inspectors' requirements.

Field Inspector Tablet Requirements

- MS Windows 10
- Hot Swappable Battery
- In use 8 Hour Battery Life
- Military Specs for drop, dust and water resistance
- Sunlight readable screen
- Touch screen usable with gloves
- Capable of using a stylus or finger
- Rotating hand strap w/ stylus holder and tether
- Shoulder/neck strap
- Wifi, Bluetooth (user able to enable/disable wifi and Bluetooth)
- Optional mobile broadband, GPS and SC Reader
- Weighs 1 – 3 pounds
- Screen size minimum 7"
- Screen size maximum 12"
- Minimum 8MP autofocus camera
- Ethernet connector
- USB 3 connector(s)
- MicroSD expansion
- Dockable
- Minimum 256GB Solid State Drive
- Handwriting recognition and transcription to text with the ability to retain original handwriting
- On-screen keyboard
- Voice to text dictation
- Ability to capture GPS tagged photos and a method to edit photo metadata
- Ability to directionally tag photos and a method to edit photo metadata
- Capacity to run software to edit meta-data
- Video recording with the ability to turn the microphone off

- Bar code reader or the ability to use camera as barcode reader
- Ability to decontaminate mobile device
- Ability to work in temperature sensitive environments (both device and batteries) – extreme heat and extreme cold. Batteries need to hold charge in extreme temperature conditions
- Ability to use camera flash as flashlight
- Ability to lock screen rotation feature
- Automobile and other portable charging methods
- Intrinsically safe device—capable of operating in incendiary environments

Note: Proper PPE is the user's responsibility. Not all PPE will allow for usage of mobile hardware in the field. As such Smart Tools may be used while in the office.

Example Hardware Specs – Panasonic CF-20:

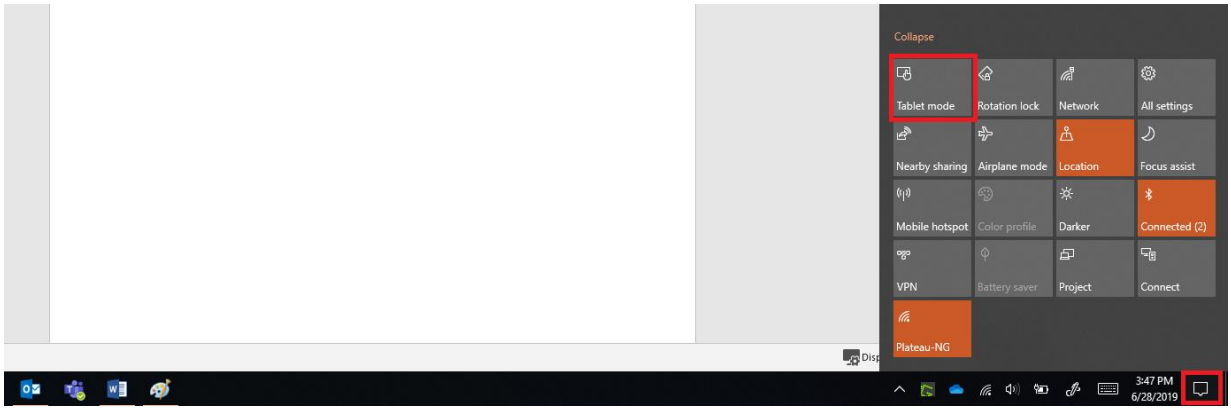
Manufacturer	Description
Panasonic	Win7(Win10Pro COA), Core m5-6Y57,vPro,10.1in 10-pt+Digitizer, 8GB, 256GB SSD, Intel a/b/g/n/ac,TPM,BT, Dual Pass (Ch.1:WWAN/CH2:WWAN), Insertable SmartCard, 4GLTE Carrier (EM7355), Webcam, 8MP Cam, Emissive Backlit KBD, ANSI Haz Loc, Toughbook Preferred
Panasonic	SPARE BATTERY FOR CF-20 MK1
Panasonic	PORT REPLICATOR FOR FM151
Panasonic	ROTATING HAND STRAP FOR CF-20
	MK1
Panasonic	LIND 90W CAR AC ADAPT W/USB PORT FOR 18 19 29 30 50 51 73 C1 F8
Panasonic	Digitizer pen IP54 waterproof for CF-20 Mk 1

Panasonic	Tether for CF-U1, CF-19, CF-20 Mk, CF-30, CF-31, CF-53 Mk1, Mk2, Mk4 Touch

Tips and Tricks

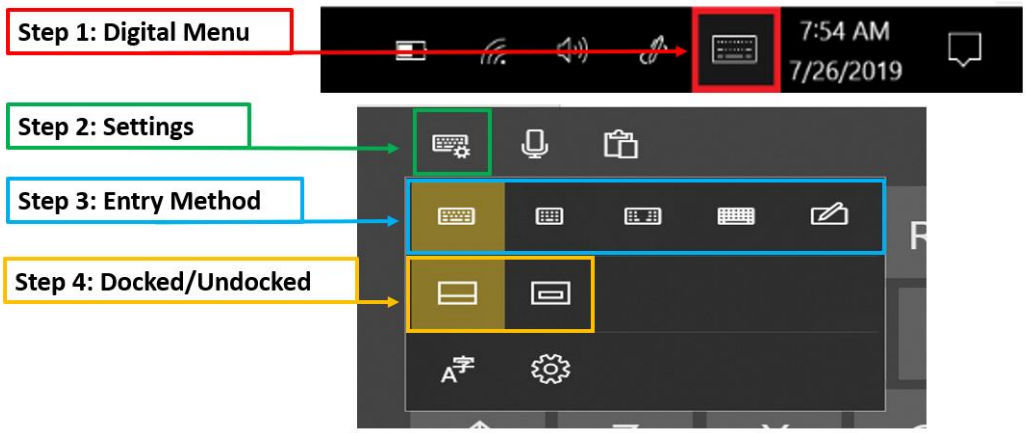
Turn-on Tablet Mode

By Selecting the notification center on the bottom right of our tablet make sure “Tablet mode” is turned on, if not, turn on the “Tablet mode” by selecting it.



Selecting Data Entry Options

Selecting the preferred Data Entry method is a four (4) step process:



Note – Docked/Undocked: "Docked" mode will keep the data entry option locked at the bottom of the screen. "Undocked" will allow the user to move the data entry option around the screen.

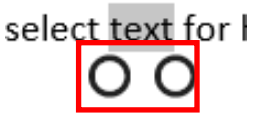
Note – Auto Center: With recent Microsoft Operating System updates, the screen will auto center when a text box is selected.

Selecting Text

When in tablet mode, whether using the stylus, finger, or the digital mouse pad:

- **one click/tap** places the cursor: Sample writing text.
- **two clicks/taps** will select the word the user is clicking on: Sample writing text.
- **three clicks/taps** will select the entire section. This allows users to quickly select text for highlighting or cutting text: Sample writing text.

When selecting text using the two or three click/tap method, a user will also be able to select additional text by dragging the bubbles (or similar icon depending on device) that appear in the desired direction:

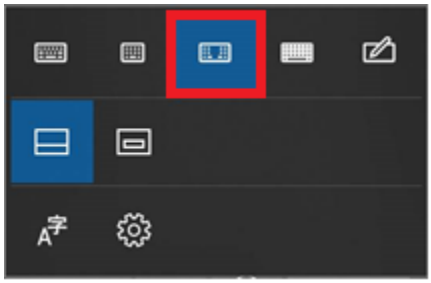


Note: *Before any entry, make sure to have the cursor focus on the input text field to enter text before selecting the Touch keyboard icon to start typing. Otherwise, it will not translate the text into the appropriate field.*

Full Digital Keyboard

Split Keyboard

As an alternative to the full keyboard, users have the choice to select a split keyboard by selecting 1st row, 3rd icon.

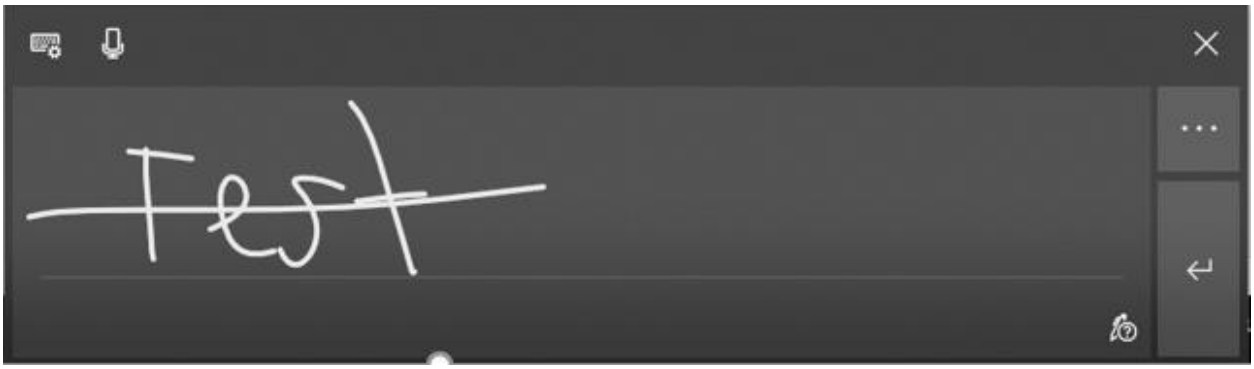


Stylus & Scribble Pad

The Scribble Pad will convert handwriting into a text format. The user can also use the stylus to select additional actions and/or characters in the scribble pad. These are found on the right-hand side of the scribble pad. Once a user begins writing in the scribble pad, these items may disappear and will be replaced by a blue checkbox. This allows the user to select the blue checkbox to approve what was just written and bring the scribble pad back to its original state.

After writing the text in the scribble pad, it will take a couple of seconds to convert and will then appear in the text box the user has selected:

To delete text in the scribble pad, draw a single line through the text (single letter, word, or whole phrase) and it will disappear:



Voice-to-Text

As an alternative to all the above options, users can use the Microphone to dictate (Voice-to-Text). To enable this option, select the Microphone icon on top of the keyboard. The microphone can also be opened in minimized mode by pressing “Ctrl + H” keys together.

Note: For the microphone to work in the field, users will need internet connectivity. This is only possible by having the device connected to internet via MiFi or a sim card. Internet connectivity could be spotty in the field.

Voice-to-text Dictation

Dictation commands: Use dictation commands to tell the PC what to do, like “delete that” or “select the previous word.”

The following table tells what can be said to accomplish a specific task. If a word or phrase is in **bold**, it's an example. Replace it with similar words to get the desired result.

To do this	**Say**
Clear a selection	Clear selection; unselect that
Delete the most recent dictation result or currently selected text	Delete that; strike that
Delete a unit of text, such as the current word	Delete **word**

Move the cursor to the first character after a specified word or phrase	Go after that; move after **word**; go to the end of **paragraph**; move to the end of that
Move the cursor to the end of a unit of text	Go after **word**; move after **word**; go to the end of that; move to the end of **paragraph**
Move the cursor backward by a unit of text	Move back to the previous **word**; go up to the previous **paragraph**
Move the cursor to the first character before a specified word or phrase	Go to the start of the **word**
Move the cursor to the start of a text unit	Go before that; move to the start of that
Move the cursor forward to the next unit of text	Move forward to the **next word**; go down to the **next paragraph**
Moves the cursor to the end of a text unit	Move to the end of the **word**; go to the end of the **paragraph**
Enter one of the following keys: Tab, Enter, End, Home, Page up, Page down, Backspace, Delete	Tap **Enter**; press **Backspace**
Select a specific word or phrase	Select **word**
Select the most recent dictation result	Select that
Select a unit of text	Select the **next three words**; select the **previous two paragraphs**
Turn spelling mode on and off	Start spelling; stop spelling

Dictating letters, numbers, punctuation, and symbols: this enables the user to dictate most numbers and punctuation by saying the number or punctuation character. To dictate letters and symbols, say "start spelling." Then say the symbol or letter or use the ICAO phonetic alphabet.

To dictate an uppercase letter, say “uppercase” before the letter. For example, “uppercase A” or “uppercase alpha.” When done, say “stop spelling.”

Here are the punctuation characters and symbols a user can dictate.

To insert this	**Say**
@	at symbol; at sign
#	Pound symbol; pound sign; number symbol; number sign; hash symbol; hash sign; hashtag symbol; hashtag sign; sharp symbol; sharp sign
$	Dollar symbol; dollar sign; dollars symbol; dollars sign

%	Percent symbol; percent sign
^	Caret
&	And symbol; and sign; ampersand symbol; ampersand sign
*	Asterisk; times; star
(	Open parenthesis; left parenthesis; open parenthesis; left parenthesis
)	Close parenthesis; right parenthesis; close parenthesis; right parenthesis
_	Underscore
-	Hyphen; dash; minus sign
~	Tilde
\	Backslash; whack
/	Forward slash; divided by
,	Comma
.	Period; dot; decimal; point
;	Semicolon
'	Apostrophe; open single quote; begin single quote; close single quote; close single quote; end single quote
=	Equal symbol; equal sign; equals symbol; equal sign
(space)	Space
|	Pipe
:	Colon
?	Question mark; question symbol
[	Open bracket; open square bracket; left bracket; left square bracket
]	Close bracket; close square bracket; right bracket; right square bracket
{	Open curly brace; open curly bracket; left curly brace; left curly bracket
}	Close curly brace; close curly bracket; right curly brace; right curly bracket
+	Plus symbol; plus sign
<	Open angle bracket; open less than; left angle bracket; left less than
>	Close angle bracket; close greater than; right angle bracket; right greater than
"	Open quotes; begin quotes; close quotes; end quotes; open double quotes; begin double quotes; close double quotes; end double quotes

Notice for Non-Federal Smart Tools Users

FedTalent & Security Awareness Training

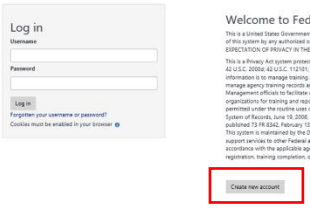
As part of EPA's Smart Tools System Security Plan, all Smart Tools users must annually take EPA's Information Security and Privacy Awareness Training. Users must pass a course test with a score of 75% or higher.

The Information Security and Privacy Awareness Training is available through EPA's Learning Management System, FedTalent. **Non-Federal Smart Tools users MUST REQUEST a FedTalent account on-line to take the required training**. If user already has a FedTalent account, users do not need to submit an additional FedTalent access request.

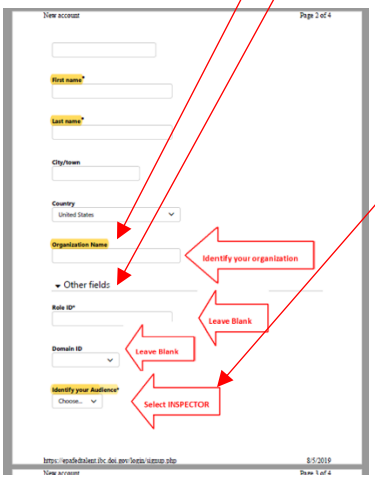
Instructions for Creating a FedTalent Account

Non-Federal Smart Tools Users:

1. Access FedTalent at: https://epafedtalent.ibc.doi.gov/login/index.php?saml=off
2. Click on the Create New Account button (at bottom of screen)



3. Complete the New Account request form
   a. Insert users email address in the "Username" field
   b. Create a password
   c. Complete the highlighted mandatory fields
   d. Identify user Organization in the "Organization Name field"
   e. Expand the "Other Fields" portion of the form by clicking on the drop-down arrow next to "Other fields"



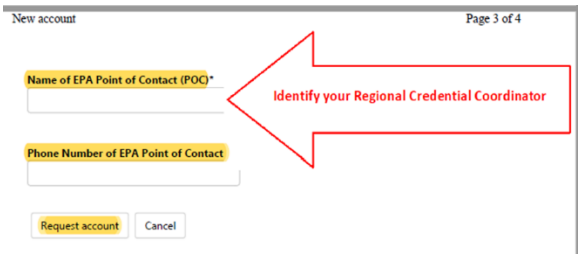
- Leave the "Role ID" and "Domain ID" fields BLANK
- **<u>IF user does not have</u> a federal inspector credential, select STATE or CONTRATOR in the "Identify your Audience" pick list.**
- **<u>IF user has</u> a federal inspector credential, select INSPECTOR in the "Identify your Audience" pick list.**

SMART TOOLS HELP DESK

(703) 651-6737

Smarttoolshelpdesk@plateauinc.com

4. Identify user **Regional Contact** in the "Name of EPA Point of Contact (POC)" field.
    a. **IF user does not have a federal inspector credential, identify Lauren Jones (202.564.0389) as user's EPA POC**
    b. **IF user has a federal inspector credential, identify user's EPA Point of Contact identified on the Inspector Wiki's Credential & Training Contacts page.**



5. Select "Request account" at the bottom of the screen.

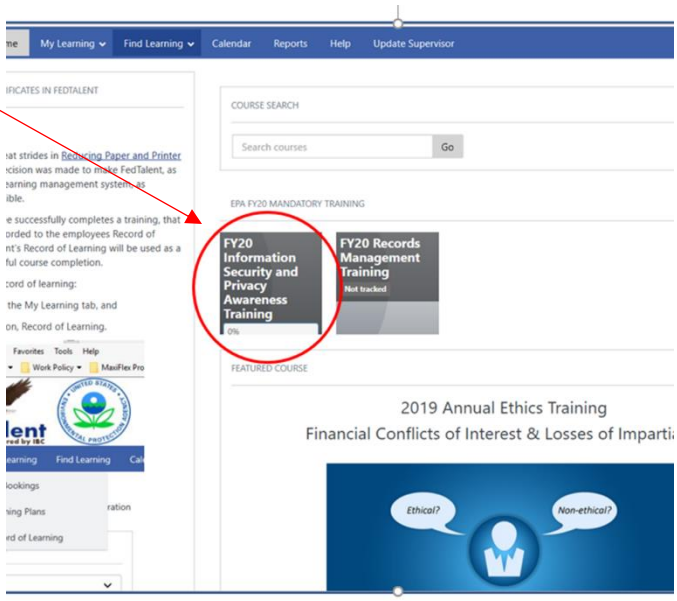
Please note: A series of emails from FedTalent will keep the user informed on the request approval process. User MUST respond to the first FedTalent email received to confirm user's email account.

Instructions for Taking the Information Security and Privacy Awareness Training

1. Once logged into FedTalent, select and complete the "FY20 Information Security and Privacy Awareness Training."

- Users must complete the FY20 Information Security and Privacy Awareness Training prior **September 30, 2020**.

- IF a user obtained a FedTalent account <u>after September 30, 2020</u>, that user must complete the FY21 Information Security and Privacy Awareness Training by **September 30, 2021.**



<u>Questions?</u>

For Smart Tools questions, contact:

- Lauren Jones (jones.lauren@epa.gov / 202.564.0389
- Emily Chow (chow.emily@epa.gov / 202.564.7071)

For FedTalent access or account questions, contact:

- inspector-training@epa.gov

For questions specific to the *Information Security and Privacy Awareness Training course,* contact:

- Lee Kelly (kelly.lee@epa.gov / 202.566.1197)
  Marcus Green (green.marcus@epa.gov / 202-566-2457)

Smart Tools Frequently Asked Questions

GENERAL

1 - What is Smart Tools?

Smart Tools is an integrated suite of digital tools for use by federal, state, tribal, territorial and local environmental inspectors and their managers. Smart Tools electronically supports planning and management, field data collection, evidence management, and generation of inspection reports.

2 – Why did EPA Develop Smart Tools?

EPA, with its co-regulating partners in state, tribal, territorial, and local governments, recognize the need to re-engineer the environmental business process from paper-based to electronic. Considering the vast size of the regulated universe and the modest level of resources available for conducting inspections, environmental agencies at all levels of government are interested in improving both the efficiency and the quality of their environmental inspections.

Smart Tools is designed to enable high levels of efficiency, quality, consistency and timeliness for the environmental inspection process. Importantly, Smart Tools will meet the expectations of current inspectors in need of next generation tools and future inspectors who expect modern technology in the workplace.

3 – When will Smart Tools be available for use?

Smart Tools is ready now for inspectors conducting inspections under the Resource Conservation and Recovery Act (RCRA) hazardous waste program.

The Smart Tools team is also creating software to support the Clean Water Act National Permit Discharge Elimination System (NPDES) program. The NPDES module of Smart Tools is scheduled to be delivered by the end of 2020 or early in 2021.

4 – Who can use Smart Tools?

Smart Tools is intended to be used by credentialed inspectors and their managers at EPA, or in State, Tribal, Territorial or Local governments. At this time – July 2020 – Smart Tools has been implemented in support of the Resource Conservation and Recovery Act (RCRA) hazardous waste program only.

5- How can governmental agencies outside of EPA gain access to Smart Tools?

Organizations outside of EPA that are implementing the RCRA hazardous waste and are interested in using Smart Tools should contact ASTSWMO (Association of State and Territorial Solid Waste Management Officials) to arrange for gaining access to Smart Tools

6 – What hardware is required to access Smart Tools?

Smart Tools is device agnostic and can run on any operating system or device. For Windows devices, the device must be Win10 or higher. Smart Tools is a web application and can be accessed from any web browser. We strongly recommend accessing Smart Tools using Google Chrome.

In the field, EPA recommends using a sophisticated ruggedized mobile computer that was designed for field use under a wide variety of conditions. EPA is currently using the Panasonic CF-20 laptop, however, Smart Tools is device agnostic. An extra battery, carrying strap, and car charger are all strongly recommended, based upon our experience testing Smart Tools in the field.

INSPECTORS QUESTIONS

1 - Is it ok for inspectors that perform very few inspections per year to use their regular laptop, issued for office work, in the field with the Smart Tools software.

Simply put, a laptop issued for office work is not a good option for field work. The device is relatively delicate, is not designed to be used outdoors under the sun, in inclement weather, does not have a stylus, nor a sophisticated camera, etc.

While there may be a few circumstances in which an inspector could properly complete a field inspection with a typical office laptop, we strongly recommend against using equipment that is not intended to be used in demanding field conditions.

2 - Can Smart Tools to do part of an inspection (for example, just the photolog)?

Yes. Smart Tools is sufficiently flexible to support inspectors in a variety of situations including performance of a "partial" inspection. Smart Tools uses a standard format to create a draft inspection report, which an inspector can edit in Microsoft Word and revise/delete any text or photos. Inspectors can upload any document they have in electronic format into Smart Tools.

STATE SPECIFIC QUESTIONS

1 - Is the licensing for Smart Tools structured so that non-federal government agencies can obtain and modify the software to better meet the specific agency's needs?

EPA has committed to a close joint governance relationship with states, tribes and their program specific associations in hopes that the federal investment in Smart Tools will substantially or completely alleviate the need for other partner agencies to invest in development efforts aimed at creating software similar to Smart Tools. States have played a substantial role in developing and testing Smart Tools to ensure it meets their needs.

Should a partner agency seek to make agency-specific modifications to Smart Tools, the agency would need to contract with the Smart Tools vendor separately.

2 - Can the code base be reused by state agencies?

State agencies cannot reuse the codebase without entering into a separate agreement with the Smart Tools vendor and paying the software licensing fee. Smart Tools currently is Plateau Solutions Inc's proprietary software. It is not owned by EPA.

3 -- Can a state develop its own modules that can be added to the Smart Tools MVP, or must such development be completed by EPAs Smart Tools contractor?

Since Smart Tools is currently proprietary software, such development would need to be completed via a separate contract effort between that particular agency and the Smart Tools vendor.

TECHNICAL / OPERATIONAL QUESTIONS

Login Issues

1 – Why can't I log in?

Here are three possible reasons: 1) You may not be registered in Smart Tools. You do this by **requesting an account** and your local Smart Tools System Administrator will approve your account and assign your access level. 2) You may be using a browser other than Google Chrome that has not been fully tested. 3) You may not have account in Web Access Management (WAM). **Reach out to your regional admin for WAM account sponsor request.**

Site-Inspection

1 - I am out in the field, offline, and I don't see my inspection. What happened?

You did not download your inspection prior to going offline. When online, you must download the inspection in the Manage Inspection Screen using the blue down arrow which will be visible after selecting the green "Pre-Inspection Completed" in the Pre-Inspection Tab.

2 – Why isn't my inspection getting captured in the facility's local time zone?

Smart Tools captures time based on the "Time Zone" selected in Site Inspection -> Site Entry -> "Add Entry & Exit Date", if there is no value selected then the system will use the hardware device time zone itself. Ensure the time zone is accurately set before you begin the inspection.

3 – When I am offline why can't I get the voice to text feature to work?

The voice to text feature requires an internet connection or SIM card.

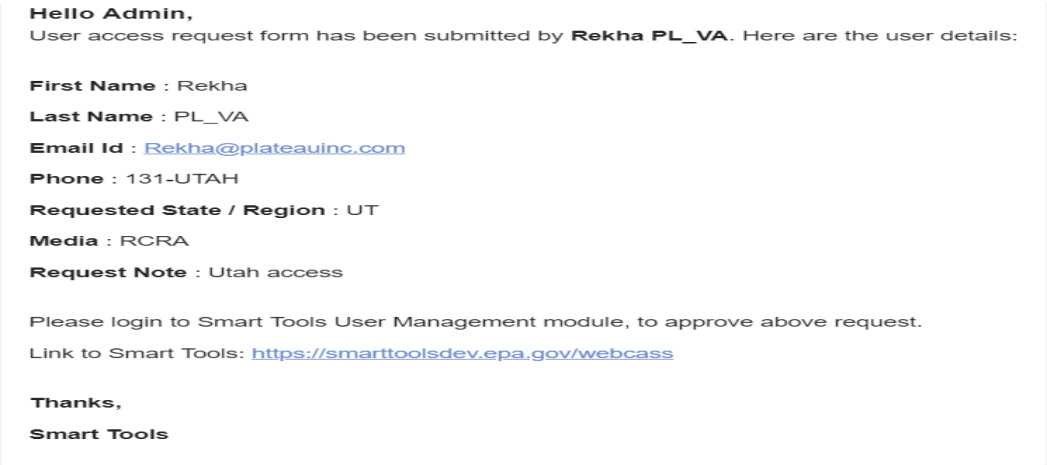
4 – Why don't I see any of the CBI (Confidential Business Information) functionalities?

If you cannot see anything relating to CBI like the CBI icon in text fields or the CBI tab at the inspection level, that is because under your user profile you have not been given CBI access or your CBI access has expired. Reach out to your Region or State Smart Tools Administrator to update your user profile. Once complete, the functionality will be immediately available even if you have already started an inspection. Be sure to view your User Profile information on a regular basis to make sure your permissions are up to date with your current responsibilities.

Post-Inspection

1 - What do I do if there is an error while syncing my data back to the server when coming back online after my site inspection is complete?

Under the Manage Inspection tab under the Action column you will see a Red icon. Click on the Red button to download your information and then contact Smart Tools Help Desk for further instructions on how to send to Plateau Software, Inc. for upload.



Hello Admin,
User access request form has been submitted by **Rekha PL_VA**. Here are the user details:

First Name : Rekha
Last Name : PL_VA
Email Id : Rekha@plateauinc.com
Phone : 131-UTAH
Requested State / Region : UT
Media : RCRA
Request Note : Utah access

Please login to Smart Tools User Management module, to approve above request.
Link to Smart Tools: https://smarttoolsdev.epa.gov/webcass

Thanks,
Smart Tools

2 – I'm out of the field, came back online, synced, and I still cannot see the Post-Inspection tab. What do I do next?

You need to go back into Site-Inspection -> Closing Conference -> Click on the green "Site-Inspection Completed" button.

Hardware Issues

For additional information on Hardware see the **Hardware and Touch Keyboard Tips and Tricks** section

1 – Why isn't my touch screen working on my tablet?

If your device is touchscreen and not working, there is a good chance you did not put your device into Tablet Mode. This is found by clicking on the notification icon in the lower right of your screen in the menu bar. For more information, please refer to the devices' User Guide.

Smart Tools System Administrators

Last Updated: June 9, 2020

Office	System Administrator	System Admin Phone Number
Arkansas	Penny J. Wilson - WILSON@adeq.state.ar.us (Lead) Carolyn Pollard - pollard@adeq.state.ar.us (Backup)	(501) 682-0868 (501) 682-0850
Maryland	Anthony Enweze – anthony.enweze@maryland.gov (Lead)	(410) 537-4245
California	Maria Salomon – maria.salomon@dtsc.ca.gov (Lead) Shawn Cox – shawn.cox@dtsc.ca.gov (Backup) Swai Ratsamythong -Swai.Ratsamythong@dtsc.ca.gov (Backup)	(916) 322-5919 (916) 322-7527 (916) 323-3511
District of Columbia (DC)	Lawrence Williams - Lawrence.williams3@dc.gov (Lead) Vickie North – victoria.north@dc.gov (Backup)	(202) 535- 2298 (202) 535- 1909
Indiana	Jessica Hayden – jlhayden@idem.in.gov (Lead)	(317) 416-5595
Kentucky	Leslie Carr-Polly – leslie.carr@ky.gov (Lead)	(502) 564-5981
Mississippi	Brad Justice – bjustice@mdeq.ms.gov (Lead)	(601) 961-5064
Montana	Ann Kron – akron@mt.gov (Lead)	(406) 444-5824
New Hampshire	Tammy Calligandes – tammy.calligandes@des.nh.gov (Lead)	(603) 271-7513
North Carolina	Rose Pruitt – rose.pruitt@ncdenr.gov (Lead) Andrew Martin – Andrew.martin@ncdenr.gov (Backup)	(336) 852-9088 (919) 270-3507
Region 1	Audrey Sheetz – sheetz.audrey@epa.gov (Lead) Linda Brolin – Brolin.linda@epa.gov (Backup)	(617) 918-0218 (617) 918-1876
Region 2	Derval Thomas – thomas.derval@epa.gov (Lead)	(212) 637-4028
Region 3	Jose Jimenez – jimenez.jose@epa.gov (Lead)	(215) 814-2148
Region 4	David Champagne – champagne.david@epa.gov (Lead) Alan Annicella – Annicella.alan@epa.gov (Backup)	(404) 562-9028 (404) 562-8610
Region 5	Mike Cunningham – Cunningham.michael@epa.gov (Lead) Gracie Scambiatterra – Scambiatterra.graciela@epa.gov (Backup) Brenda Whitney – Whitney.brenda@epa.gov (Backup)	(312) 886-4464 (312) 353-5103 (312) 353-4796

Region 6	Angela Hays – hays.angela@epa.gov (Lead) Debra Pandak – pandak.debra@epa.gov (Backup)	(214) 665-2285 (214) 665-7565
Region 7	Bryant Harris – harris.bryant@epa.gov (Lead) Neal Gilbert – gilbert.neal@epa.gov (Backup)	(913) 551-7770 (913) 551-7985
Region 8	John Mackey – mackey.john@epa.gov (Lead)	(303) 312-6056
Region 9	Rick Sakow – Sakow.rick@epa.gov (Lead) Kaoru Morimoto – Morimoto.kaoru@epa.gov (Backup)	(415) 972-3495 (415) 972-3306
Region 10	Katrina Bradshaw – Bradshaw.katrina@epa.gov (Lead) Jennifer Sullivan - Sullivan.jennifer@epa.gov (Backup) Peter Contreras - Contreras.peter@epa.gov (Backup)	(206) 553-6318 (206) 553-6978 (206) 553-6708
HQ	Lauren Jones – jones.laurenW@epa.gov (Lead) Emily Chow – chow.emily@epa.gov (Backup_	(202) 564-0389 (202) 564-7071

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