

## Cross Connection Control SAMS How-to Guide: New Device & New location

This information is for City of Calgary certified Cross Connection Control Testers. Please use the instructions below to assist with entering information into The City's compliance management software system - Smart Automation Management System (SAMS).

### Getting Started

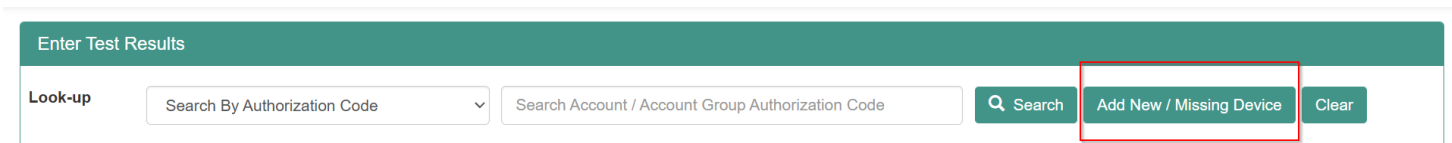
1. Log in to the Tester Portal.
  - a. If accessing the tester portal from a browser (chrome, edge, safari) use this [link](#).
  - b. If accessing the tester portal from a mobile device, please download the SAM SX Connection App by scanning the QR code below.



2. Follow the City of Calgary Authentication process to login.

### New Device and/or New Location

1. Click **Enter Test Results**
2. Click **Add/ Missing Device** button



The screenshot shows the top section of the SAMS interface. It has a green header bar with the text "Enter Test Results". Below the header, there is a "Look-up" section with two search input fields: "Search By Authorization Code" (with a dropdown arrow) and "Search Account / Account Group Authorization Code". To the right of these fields are three buttons: "Search" (with a magnifying glass icon), "Add New / Missing Device" (highlighted with a red box), and "Clear".

3. Enter **Serial Number**
4. Select the **Backflow device** from library
  - a. Use the field headers to filter and find the correct device

Backflow Library

Manufacturer	ModelNumber	DeviceSize	DeviceTypeLabel	LeadFree
Q wilkin	Q	Q	= Dc	
Wilkins	MBD	10	DC	
Wilkins	MBD	8	DC	
Wilkins	950XLU	2	DC	
Wilkins	950XLU	1.5	DC	
Wilkins	950XLU	1	DC	

5. Select **Service Type**
6. Enter the **Device Location** (e.g., maintenance closet)
7. Enter **Address**
8. Enter **Contact Phone Number**
9. Enter **Owner Name**
10. Click **Create**

Add New / Missing Device

Serial Number <sup>3</sup>

Backflow Library <sup>4</sup>

Manufacturer  Model

Size  Device Type

Service Type <sup>5</sup>

Device Location <sup>6</sup>  Water Meter Number

Address <sup>7</sup>  Owner Name <sup>9</sup>

Owner Phone Number <sup>8</sup>

<sup>10</sup>

## Initial Details tab

1. Click on the **Initial Details** tab
2. Enter the **Test Date**
3. Use the drop down to select **True or False**
4. Enter the **Line Pressure**
5. Enter **Notes** explaining if it's a new location or a newly found device
6. Use the drop down to select the **Gauge** you are using for the test

Enter Test Results

Look-up

Device Details **Initial Details** Initial Results Documents Final Details Final Results Property Information

Label

Company  Tester

Entered By  Email Address

Start Date  End Date

Test Date  Test Key

Test Received Date  Notes

Passed?  Gauge

Line Pressure (psi)

## Initial Results tab

1. Click on **Initial Results** tab
2. Click on the **Pencil icon** beside each parameter to enter results

Device Details Initial Details **Initial Results** Documents Final Details Final Results Property Information

Show 10 entries Search:

Action	ID	Parameter	Condition Assessment	Reading	Notes
	564	First Check	OK		
	565	RVO	OK		
	566	Second Check	OK		
	567	Shut Off Valve 1	OK		
	568	Shut Off Valve 2	OK		

Showing 1 to 5 of 5 entries

3. Use the drop down for Condition – Pass or Fail

4. Enter the **Reading**
5. For **Shut-Off Valves**, select **Pass** or **Fail** — *no reading is required*
6. Click **Save**

Screenshot of the 'Schedule Result Details' form. The 'Parameter' dropdown is set to 'First Check'. The 'Condition Assessment' dropdown is set to 'Pass'. The 'Reading' input field contains the value '1.1'. The 'Notes' input field is empty. At the bottom right, there are 'Save' and 'Close' buttons.

Screenshot of the 'Schedule Result Details' form. The 'Parameter' dropdown is set to 'Shut Off Valve 1'. The 'Condition Assessment' dropdown is set to 'Pass'. The 'Reading' input field contains the text 'Closed Tight'. The 'Notes' input field is empty. At the bottom right, there are 'Save' and 'Close' buttons.

**As this is an initial passing report, do not enter information into 'Final Details' or 'Final Results'**

## Upload Images (Mandatory)

1. Click on the **Documents** tab
2. Click on **Upload files**, then select Add and **Upload**

## Property Information tab

1. Click the **Property information** tab
2. Fill in the **Property Manager** information if it does not automatically display

## Save & Submit Report

1. Click **Save** button to generate the report

Screenshot of the 'Enter Test Results' page. The 'Save' button is highlighted with a red box. Below the navigation tabs, there is a table of test results:

Action	ID	Parameter	Condition Assessment	Reading	Notes
	271	First Check	Pass	8	
	272	RVO	Pass	3	
	273	Second Check	Pass	5	
	274	Shut Off Valve 1	Fail	Leaked	
	275	Shut Off Valve 2	Pass	Closed Tight	

Showing 1 to 5 of 5 entries

2. Click **Complete & Create Report** to submit the report and then click **OK**.
3. A window will open warning of failing parameters or non-conformance issues.
4. Click complete and create report. The report will be emailed to the tester and submitted for approval to The City of Calgary.

Validate Result ✕

Show 10 entries Search:

Result
<span>●</span> Second Check - Constraint Check Failed: Reading (5) Should be Less Than or Equal To Limit (0)
<span>●</span> Shut Off Valve 1 - Conditional should be Pass, OK. Else you have to set the Test Result to Fail
<span>●</span> This testing company is active
<span>●</span> Company Business License License_abcdef is acceptable. Expiration Date: 9/29/2032 11:00:00 PM
<span>●</span> No insurance information available for this testing company.

Showing 1 to 9 of 9 entries Previous 1 Next

📄 Complete & Create Report Close

**Please note: Testers are responsible for saving the report and providing it to the property owner/guardian of the test location.**