INTRODUCTION

This guide was written with the intent to give users of the C.A.S.E. Database a general overview. It is not a detail description of all the information contained in the database. The Database Committee encourages all members to use this guide and to make suggestions for improvement.
# Table of Contents

Table of Contents ............................................................................................................................................... 2

1. SETTING UP YOUR COMPUTER .................................................................................................................. 5

2. LOGGING ON TO THE C.A.S.E. DATABASE .................................................................................................. 7

3. C.A.S.E. MAIN ENTRY FORM / SCREEN STRUCTURE ............................................................................. 11

4. LATE AUDITS MESSAGE .............................................................................................................................. 12

5. MEMBER TRANSMITTAL (TX) ARCHIVES ............................................................................................... 14

   View ALL Member Transmittals .................................................................................................................... 15
   Change Form View to a Datasheet View .......................................................................................................... 16
   Finding Your Member Transmittals ................................................................................................................ 17

6. MEMBER USAGE ........................................................................................................................................... 18

   Detailed Supplier Information ......................................................................................................................... 19

7. MEMBER INFORMATION .............................................................................................................................. 21

8. CONTACT TRANSMITTAL ARCHIVE ......................................................................................................... 23

9. MEMBER PERFORMANCE .......................................................................................................................... 25

   View detailed Supplier Information: .............................................................................................................. 26
   Quickly Find Overdue Audits: ......................................................................................................................... 27

10. MEMBER PERFORMANCE .......................................................................................................................... 28

    View Detailed Supplier Information: ........................................................................................................... 30
    Find which members are scheduled to perform an audit: ........................................................................... 31

11. MEMBER LISTING REPORT ......................................................................................................................... 32

    Printing the report from your local printer: ................................................................................................. 34

12. MEMBER SUMMARY REPORT .................................................................................................................... 35

    Print to your local Printer .............................................................................................................................. 36

13. MEMBER TRANSMITTAL ARCHIVE REPORT ......................................................................................... 37

14. MEMBER TELEPHONE LISTING ............................................................................................................... 40

15. PERFORM A MEMBER TRANSMITTAL ....................................................................................................... 42

16. PERFORM A CONTACT TRANSMITTAL .................................................................................................... 44

17. AUDIT TRANSMITTAL ARCHIVES............................................................................................................ 46
<table>
<thead>
<tr>
<th>Process Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>18</td>
<td>PROCESS CODES</td>
</tr>
<tr>
<td>19</td>
<td>LATEST TRANSMITTALS</td>
</tr>
<tr>
<td>20</td>
<td>UNPROCESSED AUDITS</td>
</tr>
<tr>
<td>21</td>
<td>AUDIT ARCHIVE SUMMARY</td>
</tr>
<tr>
<td>22</td>
<td>AUDIT ARCHIVE BY ACTION</td>
</tr>
<tr>
<td>23</td>
<td>AUDIT ARCHIVE USAGE</td>
</tr>
<tr>
<td>24</td>
<td>AUDIT ARCHIVE</td>
</tr>
<tr>
<td>25</td>
<td>SCHEDULE TX ARCHIVE</td>
</tr>
<tr>
<td>26</td>
<td>AUDIT TRANSMITTALS</td>
</tr>
<tr>
<td>26</td>
<td>YOUR UNPROCESSED TRANSMITTALS</td>
</tr>
<tr>
<td>27</td>
<td>POOL TRANSMITTAL ARCHIVE</td>
</tr>
<tr>
<td>28</td>
<td>1A VENDOR USAGE SUMMARY</td>
</tr>
<tr>
<td>29</td>
<td>USAGE</td>
</tr>
<tr>
<td>30</td>
<td>YOUR USAGE</td>
</tr>
<tr>
<td>31</td>
<td>YOUR PRIORITIES</td>
</tr>
<tr>
<td>32</td>
<td>YOUR USAGE HITS</td>
</tr>
<tr>
<td>33</td>
<td>YOUR USAGE MISSES</td>
</tr>
<tr>
<td>33</td>
<td>SCHEDULE TRANSMITTAL</td>
</tr>
<tr>
<td>34</td>
<td>POOL TRANSMITTAL</td>
</tr>
<tr>
<td>34</td>
<td>ADDPOOL Transmittal</td>
</tr>
<tr>
<td>34</td>
<td>ENTER PRIORITY 1A</td>
</tr>
<tr>
<td>34</td>
<td>How to Enter and Update Your 1A Priority</td>
</tr>
<tr>
<td>34</td>
<td>How to Update all remaining vendors in ascending order</td>
</tr>
<tr>
<td>34</td>
<td>How to Remove Priorities using Remove All</td>
</tr>
<tr>
<td>35</td>
<td>1A ASSIGN USAGE</td>
</tr>
<tr>
<td>35</td>
<td>1A Assign Usage</td>
</tr>
<tr>
<td>36</td>
<td>AUDITOR TRANSMITTAL</td>
</tr>
<tr>
<td>36</td>
<td>New Auditor Transmittal</td>
</tr>
</tbody>
</table>
Remove Auditor Transmittal ................................................................. 116
Move Auditor Transmittal ................................................................. 117
1. SETTING UP YOUR COMPUTER

From the internet navigate to www.C.A.S.E.inc.org
Select the Database from the Menu bar

Scroll to the Download / Installation Instructions section on the Database page and install the Remote Desktop Access if necessary.

Your Organization’s IT Department is your primary contact should you have any problems installing the Remote Desktop Connection on your computer. Jerry Fredrick at jerry@av-info.com is the C.A.S.E. Database Systems Administrator (DSA) and may also be able to assist. The CASE GM at casegm.shadursky@gmail.com assigns each User ID and Password.

The Database Committee Chair is the secondary point of contact.
2. LOGGING ON TO THE C.A.S.E. DATABASE

b. Select the AIR CARRIER link as illustrated.
NOTE: User names and passwords are assigned by the C.A.S.E General Manager
c. The C.A.S.E. member Message pop-up appears. Read the message as required, click the Close and Begin C.A.S.E. Application button.

NOTE: Click inside the message pop up to add the scroll bar feature to view any other additional messages.

NOTE: If you have late audits a message pop-up will appear once the Close and Begin C.A.S.E. Application button is pressed.
WELCOME TO THE ACS C.A.S.E DATABASE

***********************************************************************
Please submit your CACS-10 to Sean Ressler for the Spring Conference
no later than February 28th.
***********************************************************************

Mike Taenga has a March checkpoint available. Interested, please contact
Mike at 503.31
***********************************************************************

As a reminder, please be sure to generate a REASSIGNAUDIT transmittal.

Close and Begin CASE Application
3. C.A.S.E. MAIN ENTRY FORM / SCREEN STRUCTURE

a. **Quick Access Toolbar** - The Quick Access Toolbar lets the user access common commands no matter which tab is selected on the Ribbon.

b. **Account** – Allows the user to access account information, view your profile, and switch accounts.

c. **Ribbon** - The Ribbon contains all the commands needed to perform common tasks in Access. It has multiple tabs, each with several groups of commands.

d. **Navigation Pane** – The Navigation pane displays all of the objects contained in the database. The objects are grouped by type. Double-click an object to open it.

e. **Documents Tabs** - All open objects are displayed in tabs on the Document Tabs bar. To view an object, click its tab.
4. LATE AUDITS MESSAGE

a. Double click on Late Audits the Member Performance form appears.

b. Double Click on Allocation Record (Alloc Green Field) to see more information
## C.A.S.E. 1A Vendor

<table>
<thead>
<tr>
<th>Audit Type</th>
<th>Review Audit Archives</th>
<th>Review Pool Archives</th>
<th>Print Usage</th>
<th>Records</th>
<th>Allocation Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>493</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Quality Cd</th>
<th>ATA City</th>
<th>Repair Station</th>
<th>EASA Cert No</th>
<th>Vendor Added By</th>
</tr>
</thead>
<tbody>
<tr>
<td>1A</td>
<td></td>
<td></td>
<td>1457193</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Supplier Name / Division</th>
<th>Address Line 1 / Line 2</th>
<th>Zone</th>
<th>City, State, Postal Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>CHT AEROSPACE, INC.</td>
<td>502-20540 DUNCAN WAY</td>
<td>CNDN</td>
<td>LANGLEY, BC</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Contact Name</th>
<th>Supplier Phone</th>
<th>Supplier Fax</th>
<th>Supplier Fax</th>
<th>EMail</th>
</tr>
</thead>
<tbody>
<tr>
<td>FRED HOSMANN, PRESIDENT</td>
<td>604-534-1142</td>
<td>504-534-2777</td>
<td><a href="mailto:fhosmann@chtaerospace.com">fhosmann@chtaerospace.com</a></td>
<td></td>
</tr>
</tbody>
</table>

### COMPOSITE REPAIR AND FABRICATION

<table>
<thead>
<tr>
<th>Last Entry Date</th>
<th>Scheduled Date</th>
<th>Audit Performed</th>
<th>Scheduled Member</th>
<th>Action Code</th>
<th>CASE Register</th>
</tr>
</thead>
<tbody>
<tr>
<td>12/8/2010</td>
<td>03/13</td>
<td>N</td>
<td>060</td>
<td>NEW-12</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Code</th>
<th>Member Name</th>
<th>D091</th>
<th>Process</th>
<th>Audit Date</th>
<th>Member</th>
<th>Standard</th>
</tr>
</thead>
<tbody>
<tr>
<td>940-LCM</td>
<td>12/8/2010</td>
<td>493</td>
<td>1A</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>940-LAP</td>
<td>12/8/2010</td>
<td>493</td>
<td>1A</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>940-LAF</td>
<td>12/8/2010</td>
<td>493</td>
<td>1A</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>940-LRB</td>
<td>12/8/2010</td>
<td>493</td>
<td>1A</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>940-LRB</td>
<td>11/13/2008</td>
<td>041</td>
<td>1A</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Record: [Prev] [Closest] [Next]

Record: [Prev] [Closest] [Next] [Closest] [Next]
5. MEMBER TRANSMITTAL (TX) ARCHIVES

a. Forms – (Read/Only)

The Member TX Archive function allows the user to view past Member Transmittal records.
1. Select Members from the Main Entry Form.
2. Select Member TX Archive from the Forms – (Read/Only) section, the Member Transmittal – Archive tab will appear.

**View ALL Member Transmittals**

1. Press the Forward arrow on the record navigator.
2. Shows the TOTAL number of member transmittals archived.
Change Form View to a Datasheet View:

1. Select the ADD-INS Tab above the Ribbon, then select the Datasheet view icon to change from a Form View to the Datasheet View.
Finding Your Member Transmittals

1. Place Cursor in the Member ID field.
2. Press the find button on the Ribbon or press Ctrl+F, the Find and Replace form will appear.
3. Type in value to be searched.
4. Press Find Next.
6. MEMBER USAGE

a. Forms – (Read/Only)

The Member Usage function allows the user to view Supplier usage for their organization.

1. Select Members from the Main Entry Form.
2. Select Member Usage from the Forms – (Read/Only) section, the Member Usage tab will appear.

**Detailed Supplier Information**

1. Press the Forward arrow on the record navigator to see each supplier.
2. Shows the TOTAL number of Member Usage suppliers.
3. Place cursor in Allocation Number field and double click, C.A.S.E. Register form appears.

7. MEMBER INFORMATION

a. Forms – (Read/Only)

The Member Information function allows the user to view Member Information for their organization.

1. Select Members from the Main Entry Form.
2. Select Member Information from the Forms – (Read/Only) section, the Member Information tab will appear.
3. Use the Record Navigation Arrows on the Tool Bar to review records.

4. Place cursor in Member ID field
5. Select the Find button from the Tool Bar or press Ctrl+F, the Find and Replace form appears.
6. Place the criteria you want to search for in the Find What field.
7. Select Find Next
8. CONTACT TRANSMITTAL ARCHIVE

a. Forms – (Read/Only)

The Contact Transmittal Archive function allows the user to view Contact Transmittal Archives.

![Diagram]

1. Select Members from the Main Entry Form.
2. Select Contact TX Archive from the Forms – (Read/Only) section, the Contact Transmittal Archive tab will appear.
3. Use the Record Navigation Arrows on the Ribbon to review records.

4. To find individual or filter records Place cursor in Member ID field
5. Select the Find button from the Ribbon or press Ctrl+F, the Find and Replace form appears.
6. Place the criteria you want to search for in the Find What field.
7. Press Find Next
9. MEMBER PERFORMANCE

a. Forms – (Read/Only)

The Performance function allows the user to access Allocated Audits

1. Select Members from the Main Entry Form.
2. Select Performance from the Forms – (Read/Only) section, the Member Performance Tab will appear.
3. Use the Record Navigation Arrows in the Performance form to review records.
4. Shows the total number of audits to be performed in the year.

View detailed Supplier Information:

1. Place cursor in the Green Allocation field and double click, the C.A.S.E. 1A vendor Tab appears.
Quickly Find Overdue Audits:

1. Place cursor in the Late field.
2. Select the Find button from the Tool Bar or press Ctrl+F and the Find and Replace form appears.
3. Place Y in the Find What field.
4. Press Find Next.
10. MEMBER PERFORMANCE

a. Forms – (Read/Only)

The Full C.A.S.E. Performance function allows the user to access Allocated Audits

1. Select Members from the Main Entry Form.
2. Select Full C.A.S.E. Performance from the Forms – (Read/Only) section, the Full C.A.S.E. Performance tab will appear.
3. Use the Record Navigation Arrows in the Performance form to review records.
4. Shows the total number of audits to be performed in the year.
View Detailed Supplier Information:

1. Place cursor in the Green Allocation field and double click, the C.A.S.E. 1A Vendor tab should appear.
Find which members are scheduled to perform an audit:

1. Place cursor in the Scheduled Member field.
2. Select the Find button from the Ribbon or press Ctrl+F and the Find and Replace form appears.
3. Place the criteria in the find what field.
4. Press Find Next.
11. MEMBER LISTING REPORT

a. Reports / Queries

The Member Listing function allows the user to print the CASE Membership report in a report format.

1. Select Members from the Main Entry Form.
2. Select Member Listing from the Reports / Queries section, the Report Options – Member Report - Full tab will appear.
1. Populate the fields with information.
2. From the drop-down select the destination printer.

   **NOTE:** If you do not see your printer, close the database and browser. Wait a few minutes and retry.

3. Select View / Print Report, this will produce the report as illustrated below:
Printing the report from your local printer:

1. Select the printer icon on the Ribbon this will produce the printer message to your LOCAL machine.

   NOTE: If you do not see your printer, close the database and browser. Wait a few minutes and retry.
12. MEMBER SUMMARY REPORT

a. Reports / Queries

The Member Summary function allows the user to print the Member Summary report in a report format.

1. Select Members from the Main Entry Form.
2. Select Member Summary from the Reports / Queries section, the Report Options – Member Summary Report tab will appear.

1. Populate the fields with information.
2. From the drop-down select the destination printer.

NOTE: If you do not see your printer, close the database and browser. Wait a few minutes and retry.

3. Select View / Print Report, this will produce the report as illustrated below:
Print to your local Printer

1. Select the printer icon on the Ribbon this will produce the printer message to your LOCAL machine.
2. Allows navigation for each page.
3. Printing option icons.
13. MEMBER TRANSMITTAL ARCHIVE REPORT

a. Reports / Queries

The Member TX Report function allows the user to print the Member Transmittal Archive report in a report format.

1. Select Members from the Main Entry Form.
2. Select Member TX Report from the Reports / Queries section, the Report Options – Member Transmittal Archive Report tab will appear.
1. Populate the fields with information.
2. From the drop-down select the destination printer.

   **NOTE:** If you do not see your printer, close the database and browser. Wait a few minutes and retry.

3. Select View / Print Report, this will produce the report as illustrated below:
To print the report to your local printer perform the following:

1. Select the printer icon on the Ribbon this will produce the printer message to your LOCAL machine.
2. Allows navigation for each page.
14. MEMBER TELEPHONE LISTING

a. Reports / Queries

The Member TX Report function allows the user to print the Member Transmittal Archive report in a report format.

1. Select Members from the Main Entry Form.
2. Select Member Phone List from the Reports / Queries section, the Report Options – Member Telephone Listing tab will appear.
1. Populate the fields with information.
2. From the drop-down select the destination printer.

   NOTE: If you do not see your printer, close the database and browser. Wait a few minutes and retry.

3. Select View / Print Report, this will produce the report as illustrated below:
15. PERFORM A MEMBER TRANSMITTAL

a. Forms (Process)

A Member Transmittal is used to communicate general information changes for a specific member. This information may include information such as adding new members, changing member information, or deleting members. All transmittals go through a validation process by the General Manager prior to any information being created, updated, or deleted in the database. There are three types of Member Transmittals:

1. NEWMEMBER – Adds new members
2. MEMBERCHANGE – Changes member information
3. REMOVEMEMBER – Deletes members

1. Select Members from the Main Entry Form.
2. Select Member Transmittal from the Forms (Process) section, the Member Transmittal tab will appear
### Member Transmittal

<table>
<thead>
<tr>
<th>Member ID:</th>
<th>Adm</th>
<th>Type</th>
<th>Section</th>
<th>Computer(Y/N)</th>
<th>Zone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Member Name</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Industry Code</td>
<td></td>
<td></td>
<td></td>
<td>Action: MEMBERCHANGE</td>
<td></td>
</tr>
<tr>
<td>Address Line1</td>
<td></td>
<td></td>
<td>Web Site</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Address Line2</td>
<td></td>
<td></td>
<td>Email</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Address Line3</td>
<td></td>
<td></td>
<td>Phone</td>
<td></td>
<td></td>
</tr>
<tr>
<td>City</td>
<td></td>
<td></td>
<td>Ext</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Country</td>
<td></td>
<td>Mail Stop</td>
<td>Fax</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contact/Title</td>
<td></td>
<td></td>
<td>Cell Phone</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Transmittal Comments**

5/8/2014  11:54  060es
16. PERFORM A CONTACT TRANSMITTAL

a. Forms (Process)

A Contact Transmittal is used to communicate general information changes for a specific member. This information may include information such as adding new contacts, changing contact information or removing contacts or setting a primary contact. All transmittals go through a validation process by the General Manager prior to any information being created, updated or deleted in the database. There are four types of Contact Transmittals:

1. ADD – Adds new Contacts
2. CHANGE – Changes Contact information
3. REMOVE – Deletes Contact Information
4. PRIMARY – Sets the Primary Contact information for a member.

1. Select Members from the Main Entry Form.
2. Select Contact Transmittal from the Forms (Process) section, the Contact Transmittal form will appear
1. Select your Member ID from the Dropdown form. This will populate the Contact Transmittal form.
2. Select Action Code from the Dropdown form. Change information as required.
3. Select Close and the transmittal will be sent.
17. AUDIT TRANSMITTAL ARCHIVES

a. Forms (Read Only)

The Audit Transmittal archives are READ / ONLY forms allowing the user to print or navigate through past audit transmittals.

1. Select Audits from the Main Entry Form.
2. Select Audit TX Archive from the Forms (Read/Only) section, the Audit Transmittal - Archives Tab will appear.
NOTE: This is a READ/ONLY form which may be navigated using the navigation tools on the Tool Bar or sorting the form either alphabetically or numerically based on the field the cursor is in.
18. PROCESS CODES

a. Forms (Read Only)

Process codes are READ-ONLY forms allowing the user to print or navigate through each process code used in the C.A.S.E. Database.

1. Select Audits from the Main Entry Form
2. Select Process Codes from the Forms – (Read/ Only) section. The PROCESS tab appears.
### NOTE:

This is a READ / ONLY FORM which may be navigated using the navigation tools on the Tool Bar or sorting the form either alphabetically or numerically based on the field the cursor is in.
19. LATEST TRANSMITTALS

a. Forms (Read Only)

Latest Transmittals are READ-ONLY forms allowing the user to print or navigate through each audit transmittal for a given date range.

1. Select Audits from the Main Entry Form
2. Select Latest Transmittals from the Forms – (Read/ Only) section. The View Latest Transmittal Tab appears.
3. Input a date range
4. Press the View Latest Transmittals button. The Audit Transmittals – Archives Tab appears.
5. Form navigation can be done through the buttons on the tool bar.
20. UNPROCESSED AUDITS

a. Reports

The Unprocessed Audits function allows the user to print in a report format of the Unprocessed Audit Transmit report.

1. Select Audits from the Main Entry Form.
2. Select Unprocessed Audits from the Reports / Queries section, the Report Options – Unprocessed Audits tab will appear.
1. Populate the fields with information.
2. From the drop-down select the destination printer.

   NOTE: If you do not see your printer, close the database and browser. Wait a few minutes and retry.

3. Select View / Print Report, this will produce the report as illustrated below:
To print the report to your local printer perform the following:

1. Select the Print Preview from the ribbon, then select the Print icon this will produce the printer message to your LOCAL machine.
21. AUDIT ARCHIVE SUMMARY

a. Reports

The Audit Arch. Summary function allows the user to print in a report format the Audit Archive Summary report.

1. Select Audits from the Main Entry Form.
2. Select Audit Arch. Summary from the Reports / Queries section, the Report Options – Audit Archive Summary tab will appear.
3. Populate the fields with information.
4. From the drop-down select the destination printer.

**NOTE:** If you do not see your printer, close the database and browser. Wait a few minutes and retry.

5. Select View / Print Report, this will produce the report as illustrated below:

To print the report to your local printer perform the following:

1. Select the printer icon on the tool bar this will produce the printer message to your LOCAL machine.
2. Allows navigation for each page.
3. Printing option icons.
22. AUDIT ARCHIVE BY ACTION

a. Reports

The Audit Archive by Action function allows the user to print in a report format the Audit Archive by Action report.

1. Select Members from the Main Entry Form.
2. Select Audit Archive by Action from the Reports / Queries section, the Report Options – Audit Archive by Action tab will appear.
1. Populate the fields with information
2. From the drop-down select the destination printer.

   NOTE: If you do not see your printer, close the database and browser. Wait a few minutes and retry.

3. Select View / Print Report, this will produce the report as illustrated below:
To print the report to your local printer perform the following:

1. Select the printer icon on the tool bar this will produce the printer message to your LOCAL machine.
2. Allows navigation for each page.
3. Printing option icons.
23. AUDIT ARCHIVE USAGE

a. Reports

The Audit Archive Usage function allows the user to print in a report format the Audit Archive by Usage report.

1. Select Audits from the Main Entry Form.
2. Select Audit Archive Usage from the Reports / Queries section, the Report Options – Audit Archive by Usage tab will appear.
1. Populate the fields with information
2. From the drop-down select the destination printer.

   **NOTE:** If you do not see your printer, close the database and browser. Wait a few minutes and retry.

3. Select View / Print Report, this will produce the report as illustrated below:
To print the report to your local printer perform the following:

1. Select the printer icon on the tool bar this will produce the printer message to your LOCAL machine.
2. Allows navigation for each page.
3. Printing option icons.
24. AUDIT ARCHIVE

a. Reports

The Audit Archive function allows the user to the ACS Audit Transmittal Archive by Usage report print in a report format.

1. Select Audits from the Main Entry Form.
2. Select Audit Archive from the Reports / Queries section, the Report Options – ACS Audit Transmittal Archive by Usage form will appear.
1. Populate the fields with information
2. From the drop-down select the destination printer.

NOTE: If you do not see your printer, close the database and browser. Wait a few minutes and retry.

3. Select View / Print Report, this will produce the report as illustrated below:
To print the report to your local printer perform the following:

1. Select the printer icon on the tool bar this will produce the printer message to your LOCAL machine.
2. Allows navigation for each page.
3. Printing option icons.
25. SCHEDULE TX ARCHIVE

a. Reports

The Schedule TX function allows the user to print the Schedule Transmittal Archive report in a report format.

1. Select Members from the Main Entry Form.
2. Select Schedule TX from the Reports / Queries section, the Report Options Schedule Transmittal Archive form will appear.
1. Populate the fields with information
2. From the drop-down select the destination printer.

   **NOTE:** If you do not see your printer, close the database and browser. Wait a few minutes and retry.

3. Select View / Print Report, this will produce the report as illustrated below:
To print the report to your local printer perform the following:

1. Select the printer icon on the tool bar this will produce the printer message to your LOCAL machine.
2. Allows navigation for each page.
3. Printing option icons.
26. AUDIT TRANSMITTALS

a. Forms (Process)

The Audit transmittal function allows authorized users to create, update or delete vendors in the database. All five functions (ADDVEN, DELVEN, NOACT, PENDCA, UPAUD) are reviewed by the C.A.S.E. General Manager for completeness and accuracy prior to posting.

1. Select Audits from the Main Entry Form
2. Select Audit Transmittal from the Forms – (Process) section. The Audit Transmittal Entry Form tab as illustrated below:
### NOTE:
Your Member ID will automatically default in the Member ID field. This is tied to the Auditor field. Whoever is logged in at that time will be the only choice from the Auditor dropdown.

3. From the Action dropdown select the type of Audit Transmittal to be performed.
Definitions for most used transmittals

A. **ADDVEN** - A database code for “ADD VENDOR”. Used in an electronic transmittal authorizing the Data Center to add a specific vendor to the Register.

B. **DELVEN** - A database code for “DELETE VENDOR”. Used in an electronic transmittal to the Data Center authorizing deletion of a specific vendor from the Register.

C. **NOACT** - A database code for “NO ACTION.” This transmittal code is used to inform the Data Center that a vendor, **not listed on the Register**, fails to satisfy the appropriate standard.

D. **PENDCA** - A database code for “PENDING CORRECTIVE ACTION.” This transmittal code is used to inform the Data Center that a vendor has been audited but the auditor is awaiting a response from a vendor.

E. **UPAUD** - A database code for updating audit information. Used in an electronic transmittal authorizing the Data Center to update audit information for a vendor currently listed on the Register.

4. As illustrated below place the cursor in the Alloc No. field. Directly enter the allocation number or select the allocation number from the dropdown.
This will populate the Transmittal Entry form with information from the vendor pool record.

5. Ensure the proper Quality Code is entered from the dropdown to the audit performed.
6. Enter Transmittal Comments as appropriate.
7. Press Submit
26. YOUR UNPROCESSED TRANSMITTALS

a. Forms (Process)

The Your Unprocessed Transmittal function allows authorized users to change their transmittal, PROVIDED IT HAS NOT BEEN PROCESSED. All five functions (ADDVEN, DELVEN, NOACT, PENDCA, and UPAUD) are reviewed by the C.A.S.E. General Manager for completeness and accuracy prior to posting.

1. Select Audits from the Main Entry Form
2. Select Your Unprocessed Aud from the Forms – (Process) section. The Your Unprocessed Audit Transmittal Entry tab appears.
**NOTE:** You may make changes to the information on this form. To submit the transmittal, press the close button on the title bar. **THERE IS NO MESSAGE,** the window will just close.
Saving multiple records to a spreadsheet

**Access allows you to view multiple records in a** Microsoft Excel format by performing the following:

1. Select the Microsoft Excel icon on the Toolbar, the Export – Excel Spreadsheet kiosk will appear.
Using the Browse button your spreadsheet maybe saved to your local drive.
27. POOL TRANSMITTAL ARCHIVE

a. Reports

The Pool TX function allows the user to print the Pool Transmittal Archive report in a report format.

1. Select Suppliers from the Main Entry Form.
2. Select Pool TX from the Reports / Queries section, the Report Options Pool Transmittal Archive tab will appear.
1. Populate the fields with information
2. From the drop-down select the destination printer.

    NOTE: If you do not see your printer, close the database and browser. Wait a few minutes and retry.

3. Select View / Print Report.
28. 1A VENDOR USAGE SUMMARY

a. Reports

The 1A Vendor Summary function allows the user to print the 1A Vendor Summary report in a report format.

1. Select Suppliers from the Main Entry Form.
2. Select 1A Vendor Summary from the Reports / Queries section, the Report Options 1A Vendor Summary tab will appear.
1. Populate the fields with information
2. From the drop-down select the destination printer.

   NOTE: If you do not see your printer, close the database and browser. Wait a few minutes and retry.

3. Select View / Print Report, this will produce the report as illustrated below:

To print the report to your local printer perform the following:
1. Select the printer icon on the tool bar this will produce the printer message to your LOCAL machine.
2. Allows navigation for each page.
3. Printing option icons.
29. USAGE

a. Reports

The Usage function allows the user to print the Usage by Vendor report in a report format.

1. Select Members from the Main Entry Form.
2. Select Usage from the Reports / Queries section, the Report Options Usage by Vendor form will appear.
3. Populate the fields with information.
4. From the drop-down select the destination printer.

**NOTE:** If you do not see your printer, close the database and browser. Wait a few minutes and retry.

5. Select View / Print Report, this will produce the report as illustrated below.
To print the report to your local printer perform the following:

1. Select the printer icon on the tool bar this will produce the printer message to your LOCAL machine.
2. Allows navigation for each page.
3. Printing option icons.
30. YOUR USAGE

a. Reports

The Your Usage function allows the user to print the Your Usage report in a report format.

1. Select Members from the Main Entry Form.
2. Select Your Usage from the Reports / Queries section, the Report Options Your Usage Report tab will appear.
3. Populate the fields with information
4. From the drop-down select the destination printer.

   NOTE: If you do not see your printer, close the database and browser. Wait a few minutes and retry.

5. Select View / Print Report, this will produce the report as illustrated below:
To print the report to your local printer perform the following:

1. Select the printer icon on the tool bar this will produce the printer message to your LOCAL machine.
2. Allows navigation for each page.
3. Printing option icons
31. YOUR PRIORITIES

a. Reports

The Your Priorities function allows the user to print the Your Priorities report in a report format.

1. Select Members from the Main Entry Form.
3. Populate the fields with information
4. From the drop-down select the destination printer.

   **NOTE:** If you do not see your printer, close the database and browser. Wait a few minutes and retry.

5. Select View / Print Report, this will produce the report as illustrated below:
32. YOUR USAGE HITS

a. Reports

The Your Usage - Hits function allows the user to print the Your Usage Hits report in a report format.

1. Select Members from the Main Entry Form.
2. Select Your Usage - Hits from the Reports / Queries section, the Report Options Your Usage Hits Report tab will appear.
3. Populate the fields with information
4. From the drop-down select the destination printer.

**NOTE:** If you do not see your printer, close the database and browser. Wait a few minutes and retry.

5. Select View / Print Report, this will produce the report as illustrated below:
33. YOUR USAGE MISSES

a. Reports

The Your Usage - Misses function allows the user to print the Your Usage Miss report in a report format.

1. Select Members from the Main Entry Form.
2. Select Your Usage - Miss from the Reports / Queries section, the Report Options Your Usage Miss Report form will appear.
3. Populate the fields with information
4. From the drop-down select the destination printer.

NOTE: If you do not see your printer, close the database and browser. Wait a few minutes and retry.

5. Select View / Print Report, this will produce the report as illustrated below:
To print the report to your local printer perform the following:

1. Select the printer icon on the tool bar this will produce the printer message to your LOCAL machine.
2. Allows navigation for each page.
3. Printing option icons.
33. SCHEDULE TRANSMITTAL

a. Forms (Process)

A Schedule Transmittal is the means to change the scheduled audit date. Allocated audits can be rescheduled; however, the user must follow the process as described in the C.A.S.E. Policy and Procedures Manual C.A.S.E. AUDIT ALLOCATION PROCEDURE paragraph 4.C. - Allocated Audit Performance to Schedule

1. Select Suppliers from the Main Entry Form
2. Select Schedule Transmittal from the Forms – (Process) section. The SCHEDULE TRANSMITTAL Entry tab appears.

NOTE: At the Schedule Transmittal Form ensure the Member ID and Auditor are populated as appropriate.

3. Directly enter or use the drop down feature in the Correct Alloc No field to populate the form.
The following actions can be taken from the Schedule Transmittal form.

- **ADD AUDIT**
- **DELETE AUDIT**
- **MOVE AUDIT**
- **REPORTED UNDER WRONG ALLOC**
- **REASSIGN**
- **RESCHEDULE**

Reschedule Audit Transmittal

1. Populate Member ID and Auditor fields
2. Perform a direct entry or use the dropdown in the Correct Alloc No field. Review all fields.
3. Select the RESCHEDULE action in the action field drop down.
4. Review the Schedule Member and Schedule Date fields then populate the New Sched Member and New Sched Date fields as required.
5. Add comments as necessary

Press the close button on the Schedule Transmittal title bar and the transmittal sent popup should appear.
34. **POOL TRANSMITTAL**

a. **Forms (Process)**

A Pool Transmittal is the means by which a vendor that is not in the C.A.S.E. Vendor Pool can be added to the pool for consideration in the next allocation.

1. Select Suppliers from the Main Entry Form
2. Select Pool Transmittal from the Forms – (Process) section. The POOL TRANSMITTAL Entry tab appears.

The following actions can be taken from the Pool Transmittal:

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Member ID</td>
<td>ADDPOOL: Add the vendor to the ACS 1A Audit List.</td>
</tr>
<tr>
<td>Supplier Name</td>
<td>CHANGEPOOL: Will change the vendor's information.</td>
</tr>
<tr>
<td>Division</td>
<td>COMBINEUSA: COMBINE usage from TWO vendors.</td>
</tr>
<tr>
<td></td>
<td>DELPOOL: DELETE the vendor from the ACS 1A Audit List.</td>
</tr>
<tr>
<td></td>
<td>MOVEUSAGE: Move airline usage from one vendor to another.</td>
</tr>
</tbody>
</table>

**NOTE:** All Pool transmittals change, combine, add or move usage in the Vendor Pool database only.
ADDPOOL Transmittal

1. Select ADDPOOL from the Action dropdown
2. The allocation number will automatically default to 32000
3. Ensure that the Member ID and Auditor fields are populated from the choices in dropdown.

4. Fill in all information as necessary. Pay attention to the proper Quality Code from the dropdown at the Quality Code field.
5. Select the Close button on the Pool Transmittal title bar.
The Transmittal sent pop-up appears as illustrated, select OK.
34. ENTER PRIORITY 1A

a. Forms (Process)

The Enter Priority 1A Transmittal is database procedure to assist members in assigning vendors an audit prioritization for the upcoming year.

1. Select Suppliers from the Main Entry Form
2. Select Enter Priority 1A from the Forms – (Process) section. The Update and review your priorities entry form appears.

Update and review your priorities entry form structure

1. Form navigation tool. This number represents the total number of vendors due audit.
2. The Search Member Field will automatically default to your member ID.

3. Selection of the View Current Priority Button will produce the Here is your Current Priority form.
4. Double clicking the Allocation field will produce the C.A.S.E. 1A Vendor form.
5. Double clicking in the Supplier name field reveals your New Priority and the current priority.
How to Enter and Update Your 1A Priority

1. Place cursor into first record; ensure that Supplier Name agrees with Current Supplier name in lower right corner of form.
2. Set your new priority number.
3. Click Update Priority
4. Move to the next record using the record navigation tool on the lower left.

How to Update all remaining vendors in ascending order.

NOTE: This method will prioritize all vendors in the allocation in ascending order from the last priority number forward.
1. Chose a vendor to be your number X priority (This instance is 1).
2. Choose Update Priority
3. Choose Update Remaining
How to Remove Priorities using Remove All.

1. Select Supplier Name, then select Remove All
2. The New Priority Field defaults to 99, the Priority field defaults to 0
35. 1A ASSIGN USAGE

a. Forms (Process)

The 1A Assign Usage function allows review of the entire C.A.S.E. Register and provides members the ability to assign usage to those vendors that the members’ organization deals with.

1. Select Suppliers from the Main Entry Form
2. Select 1A Assign Usage from the Forms – (Process) section. The Review And Change Your Usage entry tab appears.

Update and review your priorities entry form structure
1. Form navigation tool. This number represents the total number of vendors due audit.
1. The Search Letter Field will automatically default to All. The dropdown allows for filtering by letter.

2. The Member Code Field will automatically default to your user Member ID.

1. Selection of the VIEW CURRENT USAGE Button will produce the Member Usage tab.
1. Double clicking in the Alloc No field will produce the C.A.S.E. Register tab for the allocation number selected.
1A Assign Usage

1. Place cursor in Supplier Name Field, ensure that Supplier Name agrees with Current Supplier name as illustrated.

2. Select radio button as appropriate. Yes – your organization uses this supplier, Yes and EMP – your organization uses this supplier on your D091 Operations Specifications, No – Your organization does not use this supplier.

3. Select update usage then move cursor to next Supplier Name.
To check if your usage has been updated for that allocation number, perform the following:

1. Place the cursor in the Supplier Name Field.
2. Ensure that Yes or Yes and EMP is selected.
4. Place cursor in the Alloc No field
5. Select the Find icon from the tool bar or press Ctrl+F, the Find form appears.
6. Place the allocation number you are looking for in the Find What field.
7. Press Find Next.

Your Allocation should appear on the Member Usage form.
### Case Sustaining Member - Vendor Usage

<table>
<thead>
<tr>
<th>Alloc No</th>
<th>Supplier Name</th>
<th>D091</th>
<th>Repair Station</th>
<th>City</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>AAR DISTRIBUTION D/B/A</td>
<td></td>
<td>JR2R939K</td>
<td>OKLAHOMA CITY</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>OK 73159</td>
</tr>
<tr>
<td>4296</td>
<td>ROSEMOUNT AEROSPACE</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4333</td>
<td>GA TELESI COMPONENT RE</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Audit Archives - Your Usage**

- **Member ID**: 060
- **Member Name**: EMPIRE AIRLINES
- **Member Type**: S
- **CASE Section**: ACS

**Find**

- **Find What**: [X]
- **Look In**: Current field
- **Match**: Whole field
- **Search**: All

[Note: Additional details on the Find window are provided, including options for case sensitivity and formatted search.]
36. AUDITOR TRANSMITTAL

a. Forms (Process)

The Auditor Transmittal function allows users to Create New Auditor records, Change Existing auditor records, Remove Auditor records, move auditor records to another organization or Re-in state auditors to a previous organization.

1. Select Auditors from the Main Entry Form
2. Select Auditor Usage from the Forms – (Process) section. The Auditor Transmittal entry tab appears.
Auditor Transmittal entry form structure

The Auditor Transmittal form starts with the action dropdown consisting of the following choices:

1. New Auditor – Adds new auditors to your organization
2. Auditor Change -
3. Remove Auditor
4. Move Auditor
5. Reinstate Auditor
New Auditor Transmittal

1. Fill-in fields as required.
2. Press Close on the Title Bar to submit your transmittal.
Remove Auditor Transmittal

1. Select REMOVEAUDITOR from the Action dropdown
2. Populate the Auditor field from the dropdown, this will populate the rest of the form
3. Press Close on the Title Bar to send the transmittal

NOTE: REINSTATEAUD Action works in the same manner.
Move Auditor Transmittal

1. Select MOVEAUDITOR from the Action dropdown
2. Populate the Auditor field from the dropdown, this will populate the rest of the form.
3. Use the Move to dropdown to select the auditors new organization
4. Check for accuracy in new organization, add comments the press close on the title bar to send the transmittal.