Casement/Casement Picture Pocket Installation (Exterior):

**Tools:** (Not Provided by Manufacturer)

- Tape Measure
- Drill
- Level
- Putty Knife
- Pry bar
- Square
- Foam Gun (Optional)

- Utility Knife
- Caulk Gun
- Hammer
- Safety Glasses
- Small/Large Flat head screw driver
- Wood (to be used as exterior stops)

**Supplies:** (Not Provided by Manufacturer)

- Sealant: Low expanding foam/Loose insulation
- Drop Cloth: Non bio degradable shims
- Backer Rod

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**WARNING**

Installer is responsible for following any local/Federal laws pertaining to the disturbance or removal of lead based paint or varnish. For general guidelines pertaining to lead removal go to [www.epa.gov/lead](http://www.epa.gov/lead)

**WARNING**

Windows should never be stored in direct sunlight when still in packaging. Be sure to store windows in a dry shaded area prior to installation.

**WARNING**

Installer is responsible for proper disposal or recycling of all job site materials. Check your state and local laws for proper procedures for disposal and recycling of site waste.

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**Fig. 0-2**

**Fig. 0-3**
**Step One: Prepping the work area**

- Before beginning the installation, check window measurements of both the window opening and the new replacement window to make sure that the proper size was ordered and manufactured for that opening.
- Note should be taken of any materials that will need to be repaired or replaced prior to the installation of the replacement window.
- Any household items that are blocking the window or that could potentially become damaged during the project should be removed. Items hanging from the wall or sitting loose on shelves may need to be removed.
- Protective coverings such as a drop cloths or plastic sheeting should be used to cover the floor and furnishings at and near the work area.

**Step Two: Removing stops and sashes** (use figure 2-1)

- Remove exterior stops. These stops may be reused if not damaged.
- Pull the top sash down and cut the pulley cord to remove the sash.
- Cut the bottom pulley cords.
- Score and remove the parting stops that sit between the bottom/lock sash and the top/keeper sash channel. These will not be reused.
- Remove the bottom sash.
- Remove the pulley system at the top left and right of the jambs. The weight pocket cavity left by the pulley system should be insulated.

**Step Three: Prep the opening**

- Clean all debris from the opening.
- Any rotted or damaged material in the opening must be replaced or repaired.
- Check the opening for sill crowning/bow. Level sill using shims. Check opening for plumb and square.
- Remove packaging from the replacement window making sure not to cut or damage the window or screen.
- Remove the screen from the window frame and set aside for reinstallation later.
• Perform a dry fit to make sure that your new replacement window will fit properly and that there is adequate room for any adjustments that may be needed due to the opening being out of square, level or plumb.

• At this time check to see if a head expander will be necessary.

*If a head expander is needed, insulation should be placed between the head expander and head of the window. Head expanders are used to fill the gap between the top of the replacement window and the head of the existing window frame.

• Sealant must be applied on the exterior portion of the interior jamb/head stops and the exterior portion of the stool. (Fig.3-1)

Fig. 3-1

Apply Sealant on areas marked in red
Step Four: *Installation* (use figure 4-1)

*If installing a casement picture window, remove all (4) screw track covers*

- Insert the replacement window into the opening bottom first tilting the top back, then inwards, making sure that the window is evenly seated in the sealant on the interior stops.

Fig. 4-1

- Shims must be applied at all screw points making sure not to twist, bow or distort the window frame.
- The window should be checked for square, level and plumb. Adjust shims accordingly.
- The window must be secured using the provided installation screws in the pre-drilled screw holes leaving all screws loose to allow adjustments.
- Check the window for square after tightening each installation screw. Screws should be flush with the interior frame wall. If screws are not flush with the interior frame wall, they may interfere with the lock operation.
- Casement windows must be secured by using an installation screw through an unused screw hole in the crank assembly, and through the header slide track (remove an existing screw in header slide track and replace with an installation screw).
- Adjusting screws and shimming should not twist, bow, or distort the replacement window frame.
- Operate the sash making sure that it operates correctly, all locks function smoothly, and that all sight lines are even.

  *If installing a casement picture window reinstall screw track covers.*

Step Five: *Finishing exterior*

- Gaps around the perimeter of the window should have a layer of low expansion insulating spray foam added (refer to the spray foam manufactures instruction on the use of their product) or fiberglass insulation may be used. Insulation should not twist bow or distort the new replacement window frame.
• If a sill angle is needed, it should be applied to the new replacement window at this time. Score and cut the sill angle to the appropriate height and snap into the exterior sill snap groove.
• A bead of sealant must be placed around the exterior perimeter of the window and sill angle. Any gaps larger than 3/8” will need to be filled using backer rod before sealant is applied. (figure 5-1)
• If a “drainage system” is desired (per AAMA 2112), two 3/8” gaps may be left in the sealant where the sill angle meets the pre-existing sill and the sill may be left uninsulated.

![fig. 5-1](image)

- Insert backer rod for gaps 3/8” or larger

• New exterior stops or the previously removed exterior stops (if undamaged) should be re-installed.
• If no exterior capping is being applied, inspect the joint between the new replacement window and exterior stops for any gaps. If needed sealant may be applied around the exterior of the unit where the stops meet the new replacement window.
• If capping the exterior trim, sealant should be applied where the capping meets the new replacement window.
• Re-install screen.
Step Six: *Finishing interior*

- Inspect the joint between the new replacement window and interior stops and stool. Remove any excess sealant and fill any voids. If needed, sealant may be applied around the interior where the interior stops and stool meet the new replacement window.

**NOTE:** There are many variations of install that may be encountered when replacing windows. One conventional replacement scenario is described in these instructions. For questions on appropriate installation procedures, refer to your GENERAL CONTRACTOR, LOCAL and STATE BUILDING CODES, ARCHITECTURAL SPECIFICATIONS, and ASTM E2112.