

BPMS Administrator Edition

New Features in Version 6

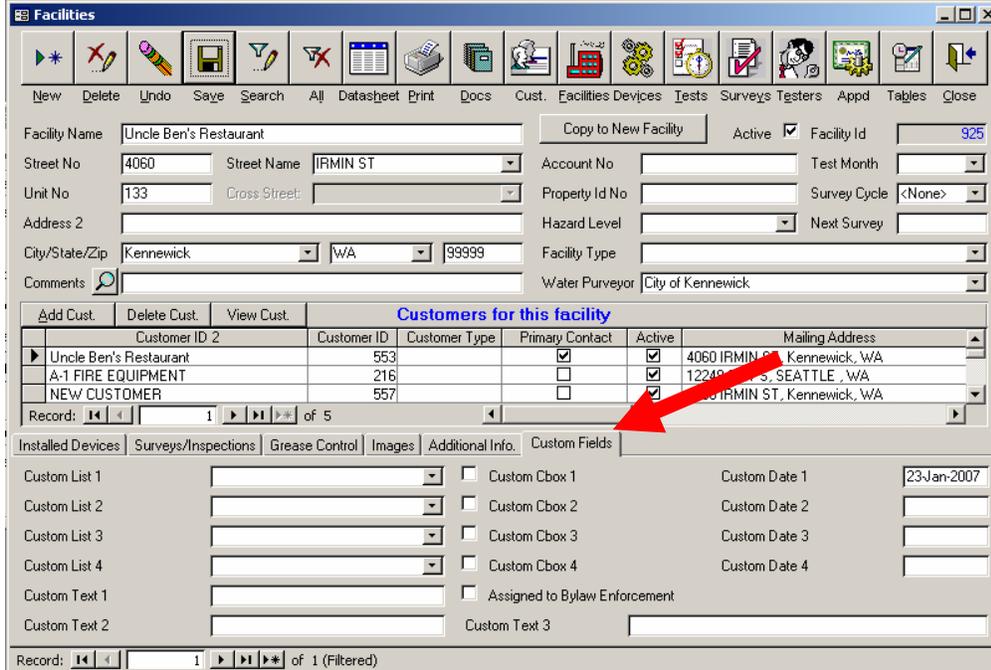
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Introduction

The purpose of this document is to inform BPMS Administrator version5 users of new features and improvements in version 6.

Custom Fields

Each form has a set of custom fields of various data types (i.e. text, data, numeric and Boolean) which can be used to meet individual requirements. Custom field can be found under the *Custom Fields* tab on most of the main BPMS forms.



Rename-able Fields

Most fields can now be renamed, providing that you have administrator access rights. You can rename fields from the Customize Fields list shown in the previous figure or from most control as long as the control is enabled. Simply right click the control then chose *Rename Field*.

Customize Field: AccountNo (Display Name: Account No)

Lookup Form Label (Display Name) Lookup Field Name (Internal Name)

Custom Display Other Options

The field name is the internal name used by BPMS to refer to this field.

| Field Name | Field ID | Table Name |
|------------|----------|------------|
| AccountNo | 67 | Facilities |

The label name is the internal name used by BPMS to refer to this label.

| Label Name | Label ID |
|------------|----------|
| AccountNo | 65 |

You can change the form label, which will be used to refer to this column in forms and reports.

| Form Label | Max Len | Default Form Label |
|------------|---------|--------------------|
| Account No | 50 | Account No |

You can change the list label. It will be used to refer to this column in searches and lists (e.g. search results)

| List Label | Max Len | Default List Label |
|------------|---------|--------------------|
| Account No | 50 | Account No |

List View Restore Defaults Color Options OK Cancel

Record: 2 of 60

You can also customize other options for most fields, which gives you more validation and display control.

Customize Field: AccountNo (Display Name: Account No)

Lookup Form Label (Display Name) Lookup Field Name (Internal Name)

Custom Display | Other Options

Enabled

Searchable

Read-Only

Mandatory

Warn if left empty but allow

Unique (No Duplicates)

Warn if not unique but allow

Limit to List

Change Case

Don't change

To UPPER case

To lower case

To Title case

BPMS Defaults

Enabled

Searchable

Read-Only

Mandatory

Warn if left empty but allow

Unique

Warn if not unique but allow

Limit to List

Change Case

Don't change

To UPPER case

To lower case

To Title case

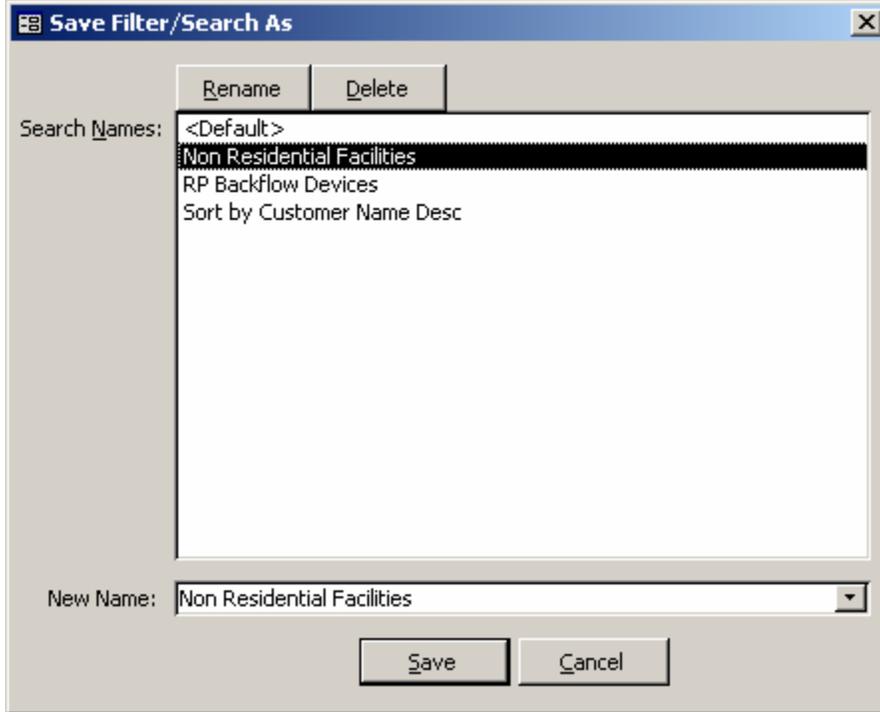
Modified By Date Created Date Modified

List View | Restore Defaults | Color Options | OK | Cancel

Record: of 60

Saving your Search

You can use *Save As* option to save your search. Saved searches can later be used to filter records in reports and mail merge letters.



Letters, Reports and Labels now have Separate Lists

When you click on the *Docs* buttons (formerly *Reports*), the following menu will appear:



Letters, Standard Reports and Labels now appear in separate lists.

Improved Letters

Mail merge letters now offer much greater flexibility. You can now add new letters to existing letter groups (e.g. Add a 4th letter to the Test Due Letters) or create a new group of letters. For instance, in the list of letters shown

below, the first two letters are both “Tester Certification Letter”, the first one is sent to Testers certified to test Fire Systems while the second one is for all other testers.

| Letters | | | | | | | |
|-----------------------------|------|--|--|------|--|-----------------|-------------------------------------|
| | | Sort Order Letter Type (Desc), Group (Asc), Item (Asc) | | | <input checked="" type="checkbox"/> Show Active Letters Only | | |
| Active Letters | | Inactive Letters | | | | | |
| Letter Type | Grp# | Item# | Letter Name | Resp | Parent Letter (Optional) | Document Name | Active |
| Tester Certification Letter | 24 | 1 | Tester Certification Letter (Fire Systems) | | | TesterCert_FS1. | <input checked="" type="checkbox"/> |
| Tester Certification Letter | 25 | 1 | Tester Certification Letter (Non Fire Systems) | | | TesterCert_NF1. | <input checked="" type="checkbox"/> |
| Test Kit Calibration Due | 6 | 1 | Test Kit Calibration Due | | | TestKitDue1.doc | <input checked="" type="checkbox"/> |
| Test Due Letter | 1 | 1 | Test Due Letter 1 | 30 | | TestLtr1.doc | <input checked="" type="checkbox"/> |
| Test Due Letter | 1 | 2 | Test Due Letter 2 | 15 | Test Due Letter 1 | TestLtr2.doc | <input checked="" type="checkbox"/> |
| Test Due Letter | 1 | 3 | Test Due Letter 3 | 7 | Test Due Letter 2 | TestLtr3.doc | <input checked="" type="checkbox"/> |
| Test Due Letter | 1 | 5 | Test Due Letter 3/Owner | | Test Due Letter 2 | TestLtr3b.doc | <input checked="" type="checkbox"/> |
| Survey Letter | 19 | 1 | Low Hazard - First Letter | 300 | | SURV_TA1.DOC | <input checked="" type="checkbox"/> |
| Survey Letter | 19 | 2 | Low Hazard - Second Letter | 30 | Low Hazard - First Letter | SURV_TA2.DOC | <input checked="" type="checkbox"/> |
| Survey Letter | 19 | 3 | Low Hazard - Third Letter | 15 | Low Hazard - Second Letter | SURV_TA3.DOC | <input checked="" type="checkbox"/> |
| Survey Letter | 19 | 4 | Low Hazard - Disconnection Notice | 7 | Low Hazard - Third Letter | SURV_TA4.DOC | <input checked="" type="checkbox"/> |
| Survey Letter | 20 | 1 | High Hazard - First Letter | 60 | | SURV_TB1.DOC | <input checked="" type="checkbox"/> |
| Survey Letter | 20 | 2 | High Hazard - Second Letter | 15 | High Hazard - First Letter | SURV_TB2.DOC | <input checked="" type="checkbox"/> |
| Survey Letter | 20 | 3 | High Hazard - Disconnection Notice | 7 | High Hazard - Second Letter | SURV_TB3.DOC | <input checked="" type="checkbox"/> |
| Survey Letter | 21 | 1 | Emergency - First Letter | 3 | | SURV_TC1.DOC | <input checked="" type="checkbox"/> |
| Survey Letter | 21 | 2 | Emergency - Disconnection Notice | 7 | Emergency - First Letter | SURV_TC2.DOC | <input checked="" type="checkbox"/> |
| Survey Letter | 22 | 1 | Survey Announcement | | | SURV_TD1.DOC | <input checked="" type="checkbox"/> |
| Survey Extension Letter | 17 | 1 | Survey Extension Letter | 30 | | Surv_Ext.doc | <input checked="" type="checkbox"/> |
| Repair Letter | 18 | 1 | Repair Letter 1 | 30 | | RepairLtr1.doc | <input checked="" type="checkbox"/> |
| Repair Letter | 18 | 2 | Repair Letter 2 | | Repair Letter 1 | RepairLtr2.doc | <input checked="" type="checkbox"/> |
| Grease Control Letter | 11 | 1 | Grease Control - Before Inspection | | | GreaseInspect.d | <input checked="" type="checkbox"/> |
| Grease Control Letter | 12 | 1 | Grease Control - Meets Requirements | | | GreaseMeetsRei | <input checked="" type="checkbox"/> |
| Grease Control Letter | 13 | 1 | Grease Control - Corrections Req'd 1 | 60 | | GreaseCorrect1 | <input checked="" type="checkbox"/> |
| Grease Control Letter | 13 | 2 | Grease Control - Corrections Req'd 2 | 14 | Grease Control - Corrections Req'd 1 | GreaseCorrect2 | <input checked="" type="checkbox"/> |

Record: 5 of 26

Prepare Letters Edit Letter Content Letter Options New Letter Delete Letter Letter Types Print List Close

More Letter Options

When you create a new letter or when you click on the Letter Options to change options on an existing letter, more options are now available.

Letter Preferences

Letter ID: 200 Group No: 24 Item No: Letter Name: Tester Certification Letter (Fire Systems) Previous Letter (Optional): Letter Type: Tester Certification Letter

One Letter Per: Tester Document Name: TesterCert_FS1.doc No of Days to Respond: (leave blank if no response required) Active:

Letter Description (optional):
Tester certification letter for all active testers with Fire Systems certification.

Default Recipients

- Primary Customer Contact Only
- Other Contacts
- Contact Type (optional):
- Water Agency
- Administrative Authority
- Tester
- Tester Company

Options for First Letter of each Group

Is the Letter Dependent on a Field?
 Yes, letter is dependent this field:
 No

First Letter to appear in Reminder when Due?
 Yes. Enter the next due date: 17-Dec-2008
 No, I will manually run from the Letters menu

Permanent Filter/Sort: View/Edit
Testers (Fire Systems)

Default Print Options

- Print Letter
- Print Form
Form Name: <Type new name or select from list>
- Print Mailing Labels/Envelopes
Type: Avery 5160 - 1" x 2.63" (Address Bloc) (Use the "Customize Labels" button to set a default mailing label for all letters.)

Edit Letter Content Edit Form Content Customize Letter Type Customize Labels Customize Devices Due Record Details OK Cancel

Record: 1 of 1 (Filtered)

Apply a Permanent Filter to a Letter

Sometimes it is necessary to apply a filter to a letter to ensure the letter is sent only to specific recipients. BPMS calls this applying a “Permanent Filter” to a letter. In the example shown in the previous figure, we only want to send Tester Certification letters to testers with a Fire Systems certification. Clicking on the *View/Edit* button besides the *Permanent Filter/Sort* box, allows you to define the filter, as shown below:

Search

To limit the scope of your search, specify a criteria then click OK. To view all records, click on the SHOW ALL button.

Quick Search | **Advanced Search** | Sort Records

| Field: | Comparison: | Value: |
|--------------|-------------|--------|
| Fire Systems | Equal To | Yes |
| | | |
| | | |
| | | |
| | | |
| | | |

Same As Above | Clear Adv Search

Search Name: Testers (Fire Systems)

Active Records Only
 Skip Search Results if only one record found

Restore Default

Clear All | Save | Save As ... | Reset ... | Open ... | New Record | Show All | OK | Cancel

Record: 1 of 20

You can now Resend Letter a Final Letter that has Expired

If a final letter has been sent and the number of days to respond has expired, an item will appear in the *Reminder* with the description “Final Letter Expired (<Final Letter Name>)” where “(<Final Letter Name>” is the final letter (e.g. Test Due Letter 3). You can now click on the *Prepare* button on that letter to resend the letter to all recipients for which the letter has expired.

More Test Details

More details about the test results have been added, mainly to add new fields in case the Tester that performed the Initial Tests and the Final Test (after repairs) is not the same.

The screenshot shows the 'Tests' application window with the following details:

- Test ID:** 2
- Install ID:** 2
- Serial No:** UK180
- Make:** CLA-VAL
- Model:** RP-1
- Size:** 2 1/2"
- Type:** RP
- Facility Address:** 18700 ORILLA RD S, TUKWILA
- Test Cycle Code:** 3
- Test Type:** Annual Test
- Pressure Unit:** Psi
- Repair/Replacement Summary:** (empty)
- Service Restored:**
- Air Gap OK:**

| | 1st Check | 2nd Check | Relief Valve | Shut-Off #1 #2 | Buffer: |
|---------------------|--|--|---|--|---|
| Initial Test | Held At: <input type="text"/> <input checked="" type="checkbox"/> Closed Tight <input type="checkbox"/> Leaked | Held At: <input type="text"/> <input checked="" type="checkbox"/> Closed Tight <input type="checkbox"/> Leaked | Opened At: <input type="text"/> <input type="checkbox"/> Did Not Open <input type="checkbox"/> Leaked | Closed Tight <input type="checkbox"/> <input type="checkbox"/> Leaked <input type="checkbox"/> <input type="checkbox"/> | <input type="text"/> <input type="text"/> |
| Final Test | Held At: <input type="text"/> <input type="checkbox"/> Closed Tight | Held At: <input type="text"/> <input type="checkbox"/> Closed Tight | Opened At: <input type="text"/> <input type="checkbox"/> Leaked | Closed Tight <input type="checkbox"/> <input type="checkbox"/> Leaked <input type="checkbox"/> <input type="checkbox"/> | <input type="text"/> <input type="text"/> Remove Old Tests |

Basic Info | Additional Info | Custom Fields/Date Stamps

| Pass/Fail | Test Date | Next Test Date | Tester's Name | Cert. No | Test Kit Serial No | Calib. Date | Time In | Time Out |
|----------------------|-------------|----------------|---------------|----------|--------------------|-------------|---------|----------|
| Initial Test: PASSED | 09-Apr-1997 | 01-Apr-2006 | BRAD DUPEICH | 2121 | 356588 | 10-Sep-2008 | | |
| Final Test: | | 01-Apr-2006 | | | | | | |

Tester's Remark (Repair Info, etc):

Old Device Info (use only if field [Test Type] above is set to "Replacement")

| Serial No | Make | Model | Size | Type | Date |
|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
| <input type="text"/> |

Record: 1 of 4800

Work with Multiple BPMS Databases

For those of you administering the cross-connection a cross-connection control program on behalf of multiple water purveyors, BPMS allows you to create a *Company Database* for each water purveyor.

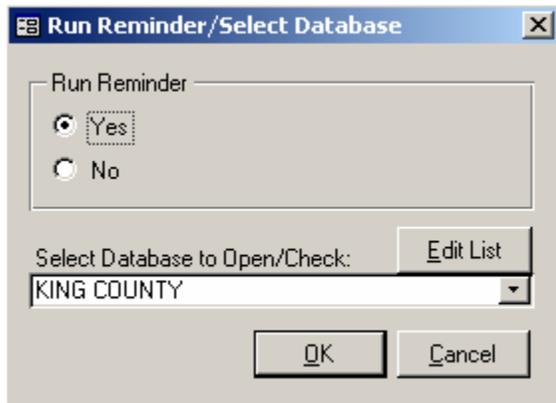
The screenshot shows the 'Change Company Database' dialog box with the following content:

To open a company, double-click the database name.

| Database Name | Data Folder: |
|-----------------------------------|---|
| King County | C:\Data\BPD\BPDXP\BPMS6_Admin\ |
| Clark Public Utilities | D:\Data\User Data\clarkpud\23-Jan-09\ |
| Peterborough Utilities Commission | D:\Data\User Data\Peterborough Utility Services\Access\BPMSAD_v6\ |

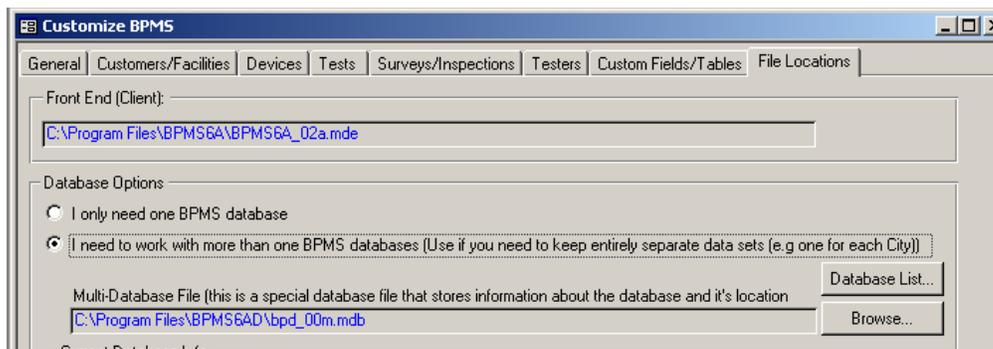
Buttons: Goto, New, Edit, Remove, Close

When working with more than one company databases is enabled, the Reminder prompt dialog box gives you the option to select the database to open as shown below.



By default BPMS will not have the multi-database option enabled. To enable it follow these steps:

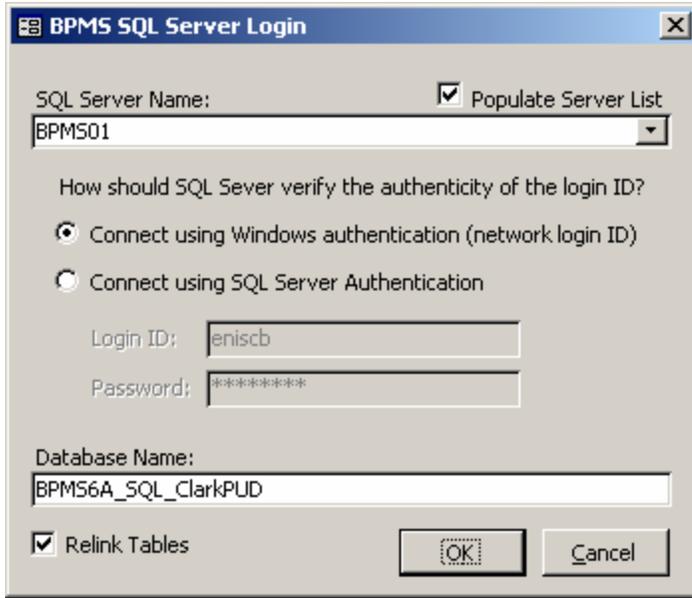
1. From the *Switchboard*, click on **Customize** then click on the *File Locations* tab.



2. Select option “*I need to work with more than one BPMS database*” then click on the *Database List* button.
The current database will appear on the list, click on the **New** button to add another database.
3. To add a new database to the list, click on **New** then click the **Browse** button to locate the database folder then click **OK** to save your entry.

Option to store the BPMS database in Microsoft SQL Server

Version 6 gives you the option to store the BPMS database in a Microsoft SQL Server database. A Microsoft SQL Server database generally provides better performance and is more scalable than a Microsoft Access database. If you have performance problems with the Microsoft Access database (the default) this option may work better for you if you can get authorization from your IT department.

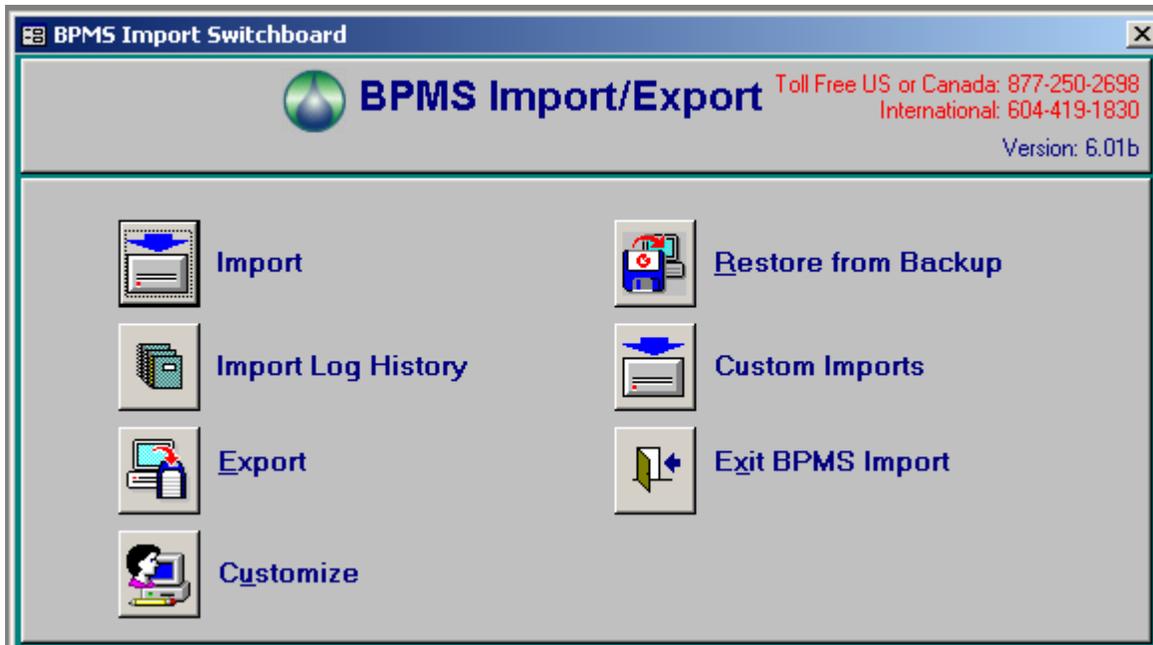


To load the BPMS database into a SQL Server database, refer to “Chapter 8 – Using BPMS with SQL Server” of the BPMS reference manual.

Interface with External Systems with the BPMS Import/Export Utility

The BPMS Import/Export application allows to keep your customer mailing information up to date by importing data from your Customer Information Systems (a.k.a. Utility Billing system).

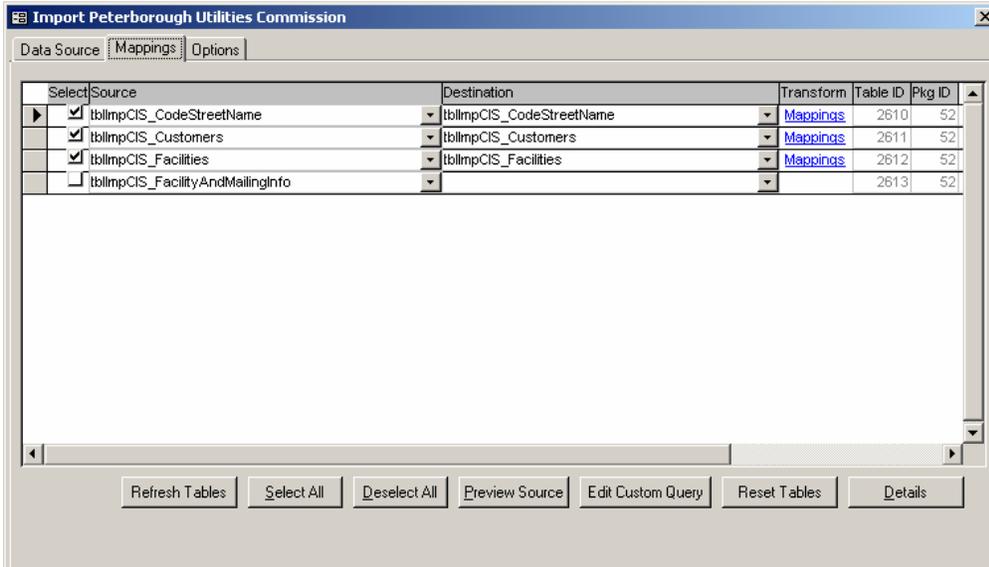
You can also export the main data tables in BPMS to external databases.



Import from Customer Information Systems (CIS)

You can import data exported from an external customer information system (CIS) into the BPMS database. This way, any time there is a change of ownership or property management firm in your main system, the BPMS

customer information will be updated. Information in other BPMS tables can be updated as well, including the Street Name table, which contains the list of valid street names and information about the facility such as the Service Status, the In Service Date, etc.



New Grease Control Module

Liquid wastes containing fats, oil and grease that are dumped down the sewer drain can coagulate and congeal into a hardened layer on the inside of building drain pipes and wastewater Collection Lines in the Wastewater Treatment System.

BPMS now includes everything you need to manage your grease control program.

Facilities form has a new “Grease Control” tab

The new “Grease Control” tab is used to enter information about the food service establishment as well as a list of all the grease control devices such as grease traps and grease interceptors.

The screenshot shows the 'Facilities' software window. The main form is for 'Uncle Ben's Restaurant' with Facility ID 925. Below the main form is a table titled 'Customers for this facility' with columns: Add Cust., Delete Cust., View Cust., Customer ID, Customer Type, Primary Contact, Active, and Mailing Address. The table lists three customers: Uncle Ben's Restaurant (ID 553), A-1 FIRE EQUIPMENT (ID 216), and NEW CUSTOMER (ID 557). Below this is the 'Grease control devices for this facility' section, which is highlighted with a red arrow. It contains a table with columns: New Device, Delete Device, View Device, Type, Location, Capacity, Flow Rate, Maintenance Freq., and Active. The table lists two devices: Grease Trap (300 gallons, 15 gpm, 6 Weeks) and Grease Interceptor (1000 gallons, 50 gpm, 3 Months). The bottom of the window shows 'Record: 1 of 1 (Filtered)'.

Grease Control Devices form

The Grease Control Devices form is used to collect an details about each device within the food establishment.

The screenshot shows the 'Grease Control Devices' software window. The form is for a 'Grease Trap' at 'Uncle Ben's Restaurant' (Facility ID 925). The form is divided into several sections: Facility Info, Customer Info, Device Type, Location, Make, Model, Additives, Capacity, Flow Rate, and Comments. The Device Type is 'Grease Trap', Location is 'In kitchen on pot sink.', Make is 'Watts', Model is empty, Additives is 'Bio-Universal Dry', Capacity is '300 gallons', and Flow Rate is '15 gpm'. The Maintenance Freq. is '6 Weeks'. There are checkboxes for 'Access Manholes in Place' and 'Sample Point on Interceptor'. The bottom of the window shows 'Record: 1 of 1 (Filtered)'.

Grease Control Letters

Use grease control letters to notify food service establishments about your program and to send notice of violations or compliance, much the same way cross-connection surveys are used to protect the drinking water.

Letters

Sort Order Letter Type (Desc), Group (Asc), Item (Asc) Show Active Letters Only

Active Letters Inactive Letters

| Letter Type | Grp# | Item# | Letter Name | Resp | Parent Letter (Optional) | Document Name | Active | Ltr ID |
|--------------------------|------|-------|--------------------------------------|------|--------------------------------------|-----------------|-------------------------------------|--------|
| Test Due Letter | 1 | 1 | Test Due Letter 1 | 30 | | TestLtr1.doc | <input checked="" type="checkbox"/> | 1 |
| Test Due Letter | 1 | 2 | Test Due Letter 2 | 15 | Test Due Letter 1 | TestLtr2.doc | <input checked="" type="checkbox"/> | 2 |
| Test Due Letter | 1 | 3 | Test Due Letter 3 | 7 | Test Due Letter 2 | TestLtr3.doc | <input checked="" type="checkbox"/> | 13 |
| Test Due Letter | 1 | 5 | Test Due Letter 3/Owner | | Test Due Letter 2 | TestLtr3b.doc | <input checked="" type="checkbox"/> | 20 |
| Survey Letter | 19 | 1 | Low Hazard - First Letter | 300 | | SURV_TA1.DOC | <input checked="" type="checkbox"/> | 188 |
| Survey Letter | 19 | 2 | Low Hazard - Second Letter | 30 | Low Hazard - First Letter | SURV_TA2.DOC | <input checked="" type="checkbox"/> | 189 |
| Survey Letter | 19 | 3 | Low Hazard - Third Letter | 15 | Low Hazard - Second Letter | SURV_TA3.DOC | <input checked="" type="checkbox"/> | 190 |
| Survey Letter | 19 | 4 | Low Hazard - Disconnection Notice | 7 | Low Hazard - Third Letter | SURV_TA4.DOC | <input checked="" type="checkbox"/> | 191 |
| Survey Letter | 20 | 1 | High Hazard - First Letter | 60 | | SURV_TB1.DOC | <input checked="" type="checkbox"/> | 192 |
| Survey Letter | 20 | 2 | High Hazard - Second Letter | 15 | High Hazard - First Letter | SURV_TB2.DOC | <input checked="" type="checkbox"/> | 193 |
| Survey Letter | 20 | 3 | High Hazard - Disconnection Notice | 7 | High Hazard - Second Letter | SURV_TB3.DOC | <input checked="" type="checkbox"/> | 194 |
| Survey Letter | 21 | 1 | Emergency - First Letter | 3 | | SURV_TC1.DOC | <input checked="" type="checkbox"/> | 195 |
| Survey Letter | 21 | 2 | Emergency - Disconnection Notice | 7 | Emergency - First Letter | SURV_TC2.DOC | <input checked="" type="checkbox"/> | 196 |
| Survey Letter | 22 | 1 | Survey Announcement | | | SURV_ID1.DOC | <input checked="" type="checkbox"/> | 197 |
| Survey Extension Letter | 17 | 1 | Survey Extension Letter | 30 | | Surv_Ext.doc | <input checked="" type="checkbox"/> | 130 |
| Repair Letter | 18 | 1 | Repair Letter 1 | 30 | | RepairLtr1.doc | <input checked="" type="checkbox"/> | 143 |
| Repair Letter | 18 | 2 | Repair Letter 2 | | Repair Letter 1 | RepairLtr2.doc | <input checked="" type="checkbox"/> | 144 |
| Grease Control Letter | 12 | 1 | Grease Control - Before Inspection | | | GreaseInspect.d | <input checked="" type="checkbox"/> | 106 |
| Grease Control Letter | 12 | 1 | Grease Control - Meets Requirements | | | GreaseMeetsRei | <input checked="" type="checkbox"/> | 113 |
| Grease Control Letter | 13 | 1 | Grease Control - Corrections Req'd 1 | 60 | | GreaseCorrect1 | <input checked="" type="checkbox"/> | 114 |
| Grease Control Letter | 13 | 2 | Grease Control - Corrections Req'd 2 | 14 | Grease Control - Corrections Req'd 1 | GreaseCorrect2 | <input checked="" type="checkbox"/> | 115 |
| Grease Control Letter | 13 | 3 | Grease Control - Corrections Req'd 3 | 14 | Grease Control - Corrections Req'd 2 | GreaseCorrect3 | <input checked="" type="checkbox"/> | 120 |
| Grease Control Extension | 14 | 1 | Grease Control - Extension Letter | 30 | | GreaseExt.doc | <input checked="" type="checkbox"/> | 121 |

Record: 1 of 26

Prepare Letters Edit Letter Content Letter Options New Letter Delete Letter Letter Types Print List Close

If Grease Control Letters don't appear under the Active Letters tab, click on the Inactive Letters tab then check the Active box for all letters of type "Grease Control Letter".