BPMS Administrator Edition
New Features in Version 6

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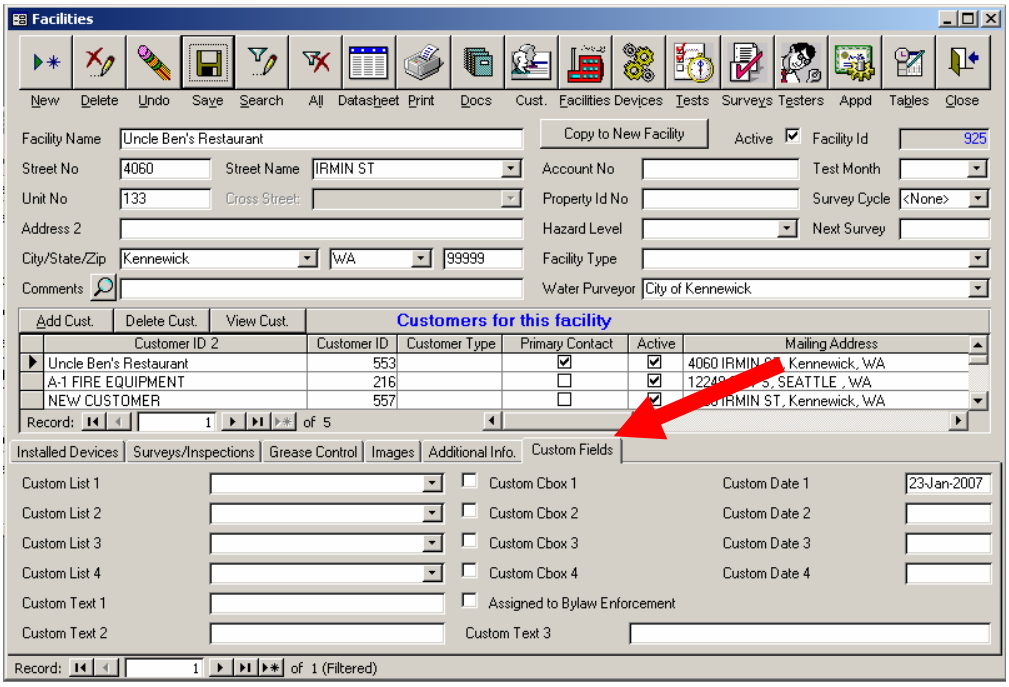
Introduction

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

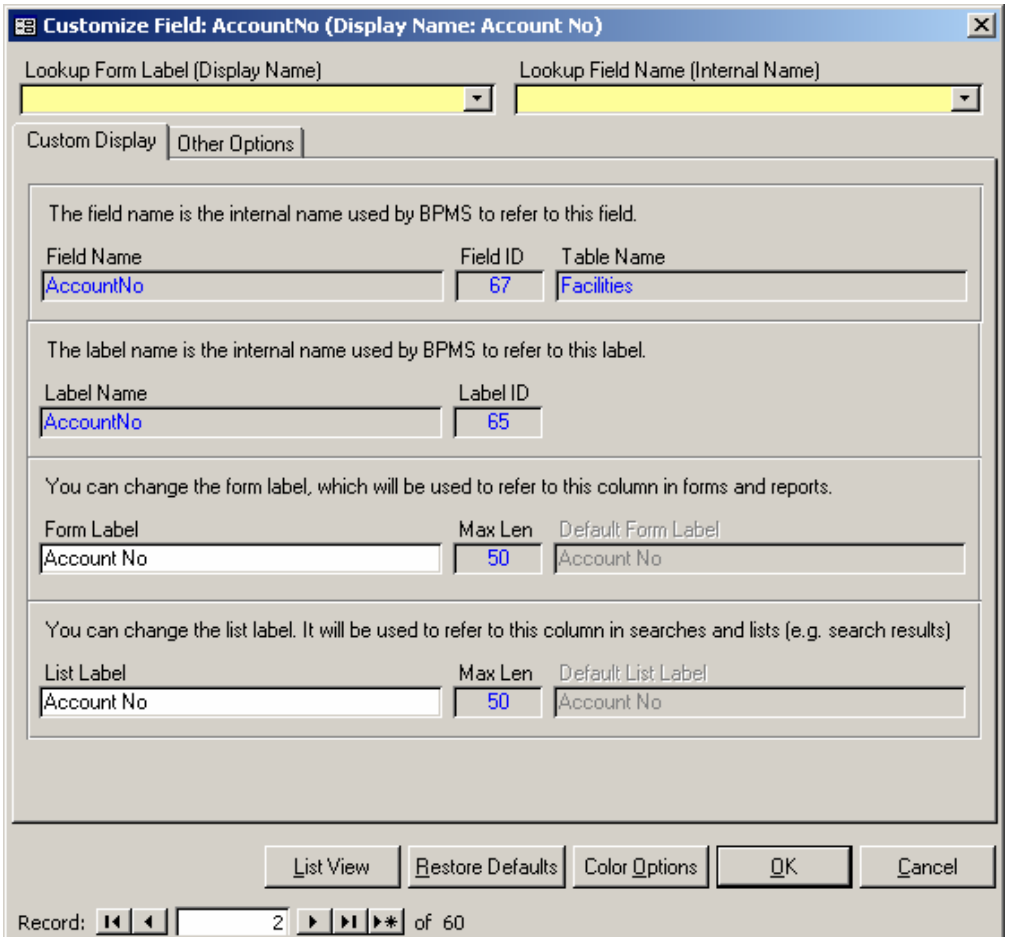
Custom Fields

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.

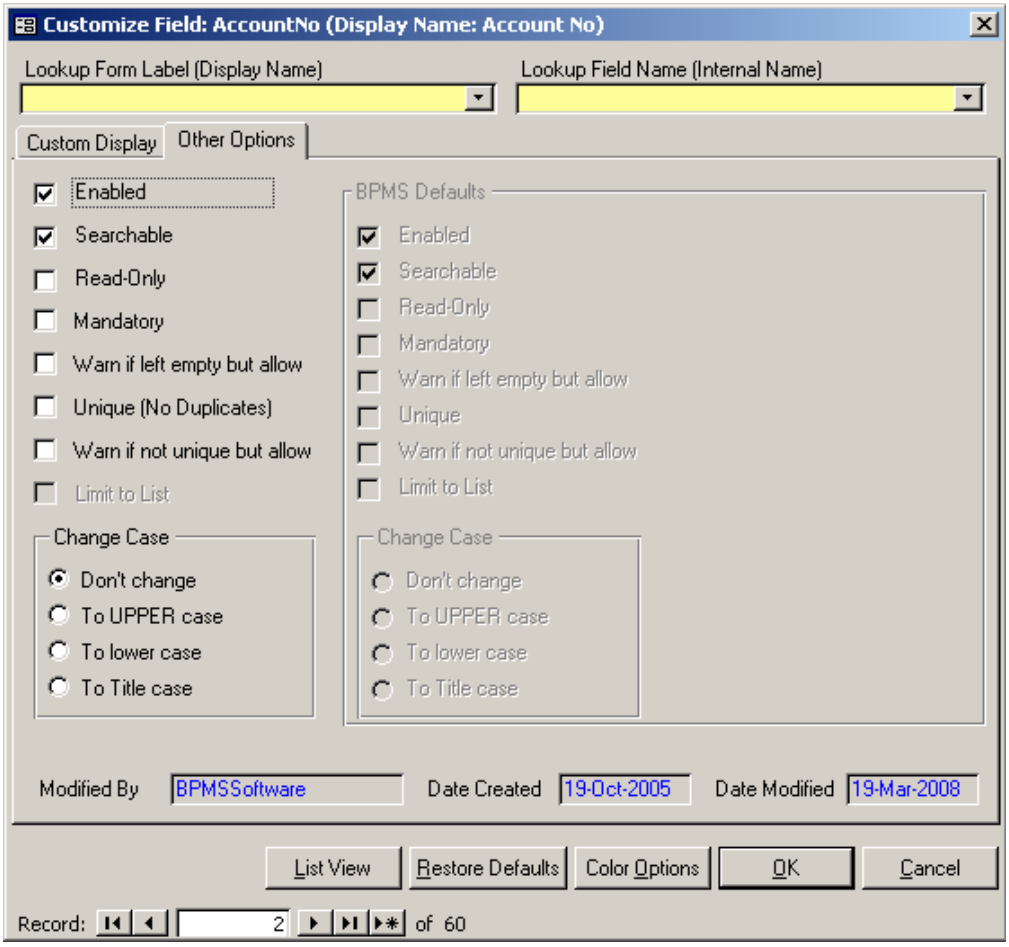


Rename-able Fields

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*.

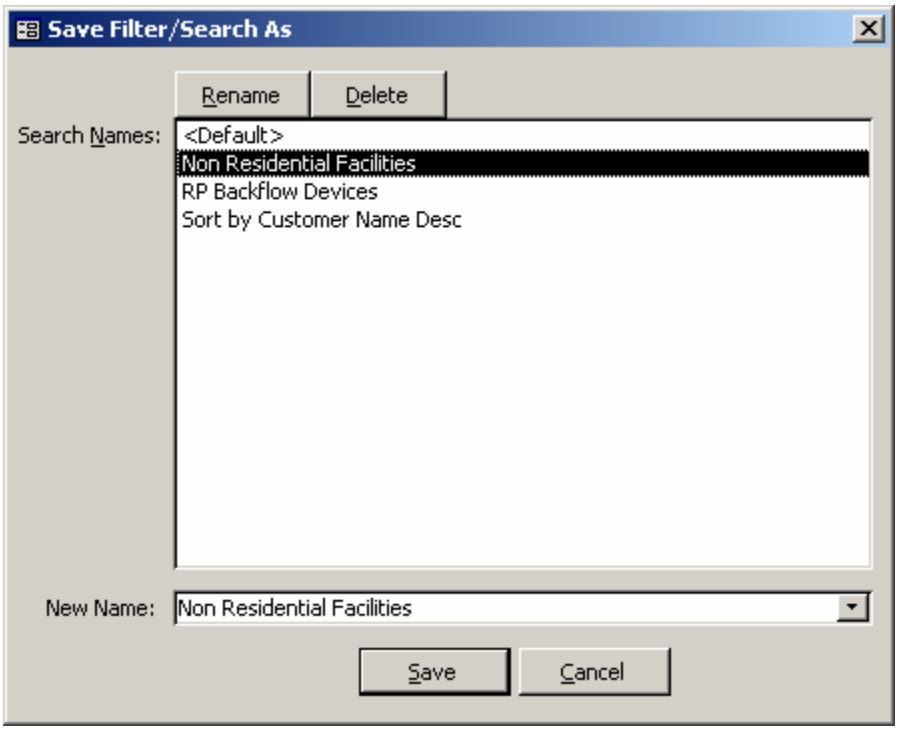


You can also customize other options for most fields, which gives you more validation and display control.



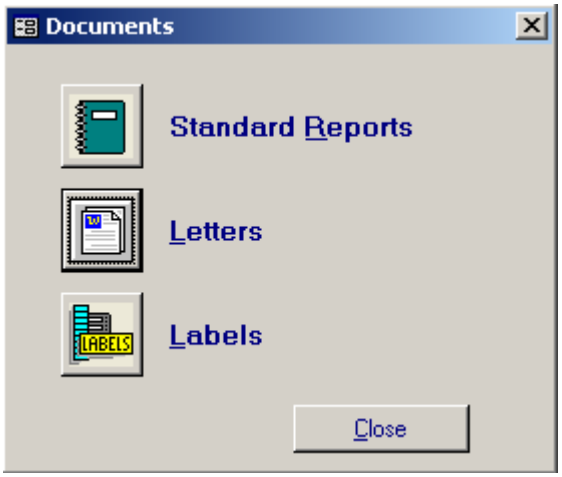
Saving your Search

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:

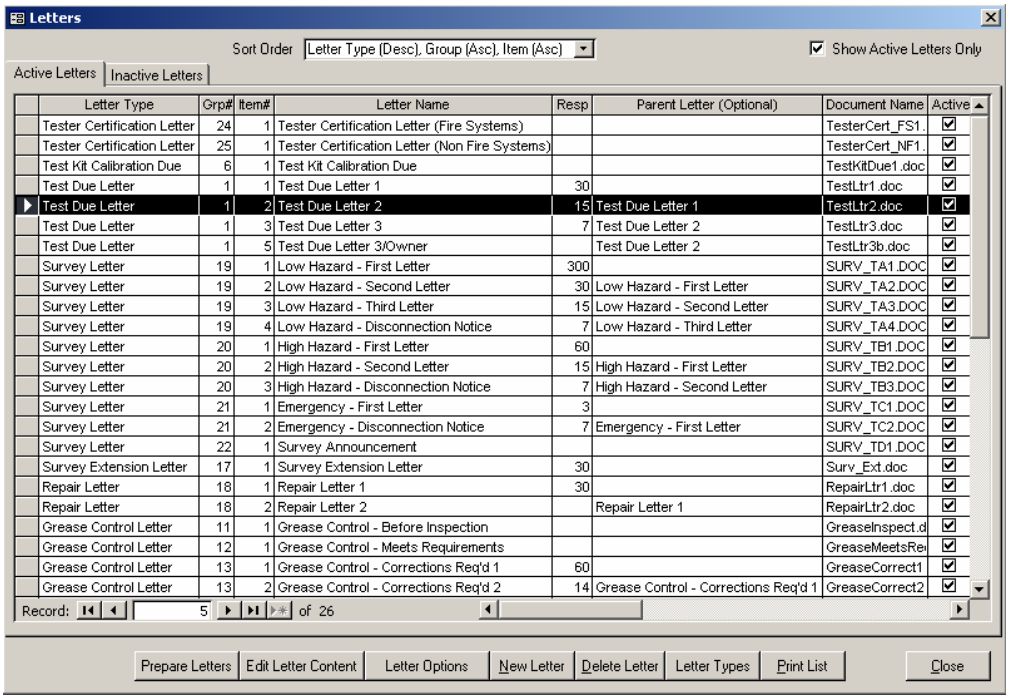


Letters, Standard Reports and Labels now appear in separate lists.

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.

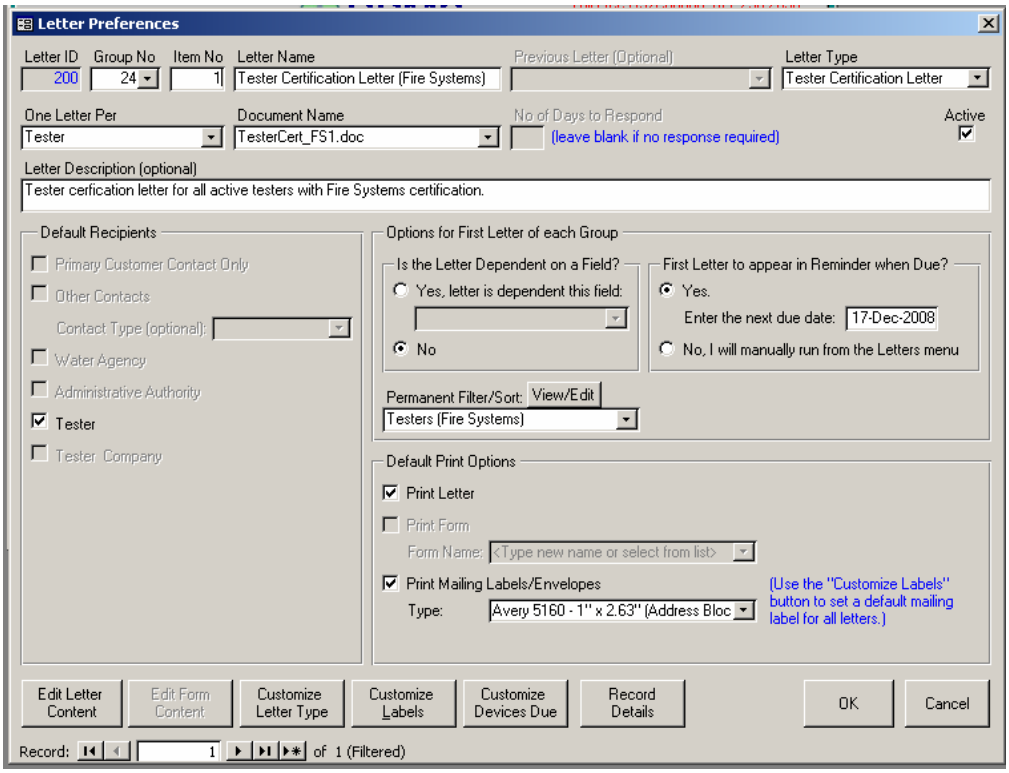


Letter Type	Grp#	Item#	Letter Name	Resp	Parent Letter (Optional)	Document Name	Active
Tester Certification Letter	24	1	Tester Certification Letter (Fire Systems)			TesterCert_FS1.	☑
Tester Certification Letter	25	1	Tester Certification Letter (Non Fire Systems)			TesterCert_NF1.	☑
Test Kit Calibration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

Record: 5 of 26

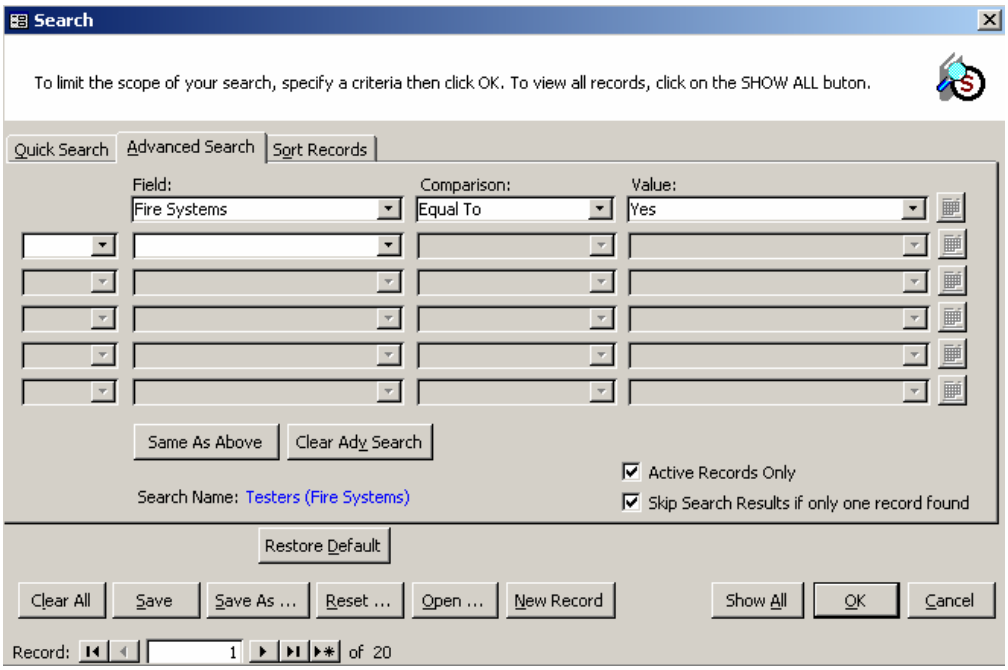
More Letter Options

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.



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:

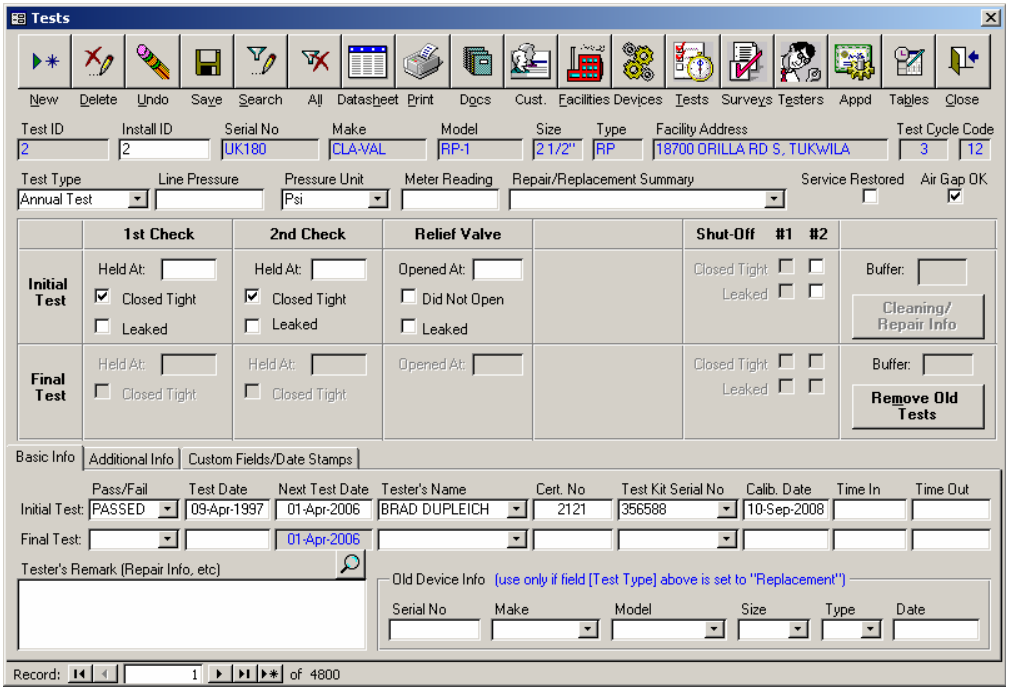


You can now Resend Letter a Final Letter that has Expired

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.

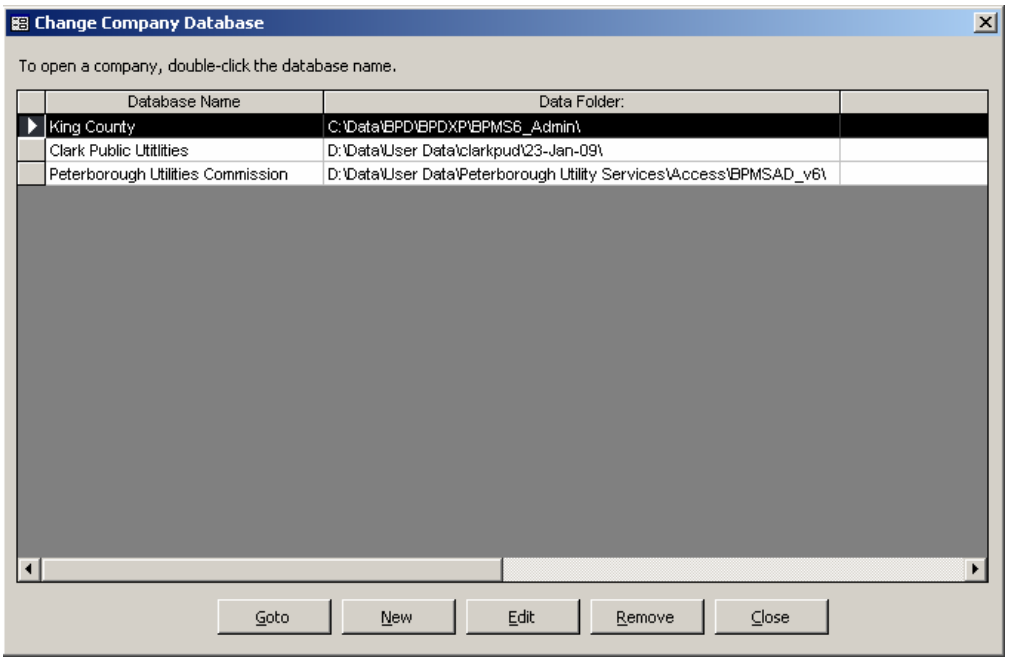
More Test Details

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.

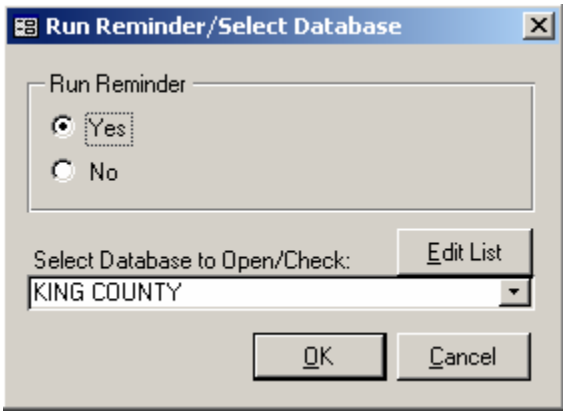


Work with Multiple BPMS Databases

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.

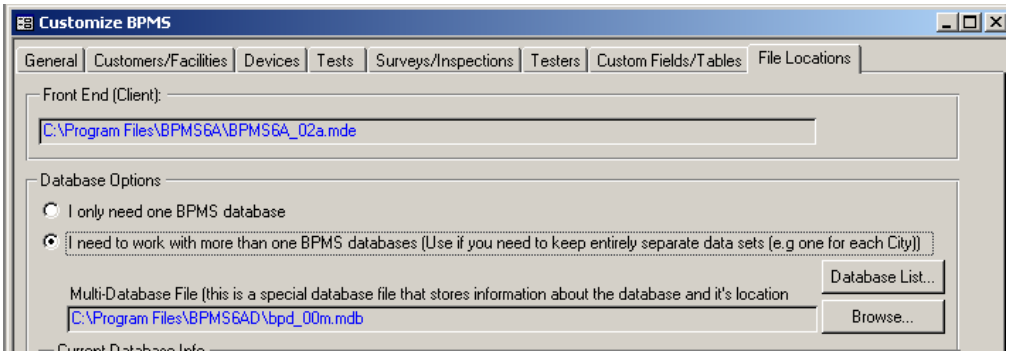


When working with more than one company databases is enabled, the Reminder prompt dialog box gives you the option to select the database to open as shown below.



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.



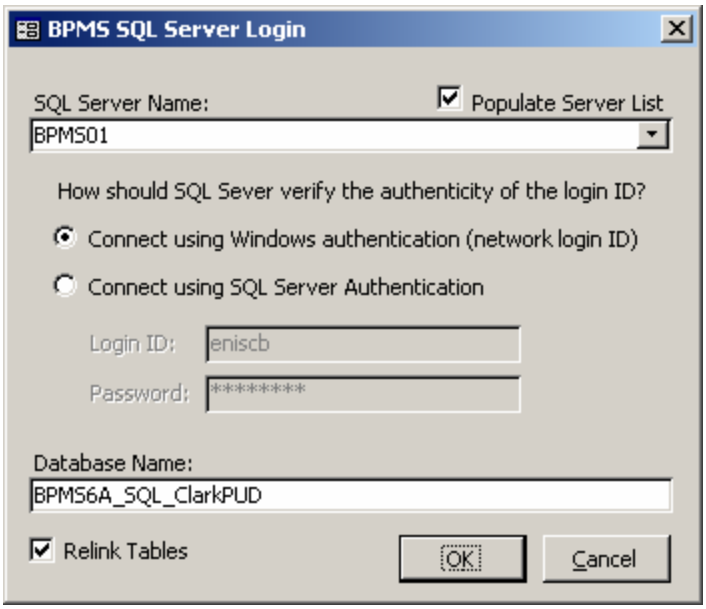
2. Select option "***I need to work with more than one BPMS database***" then click on the ***Database List*** button.

   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

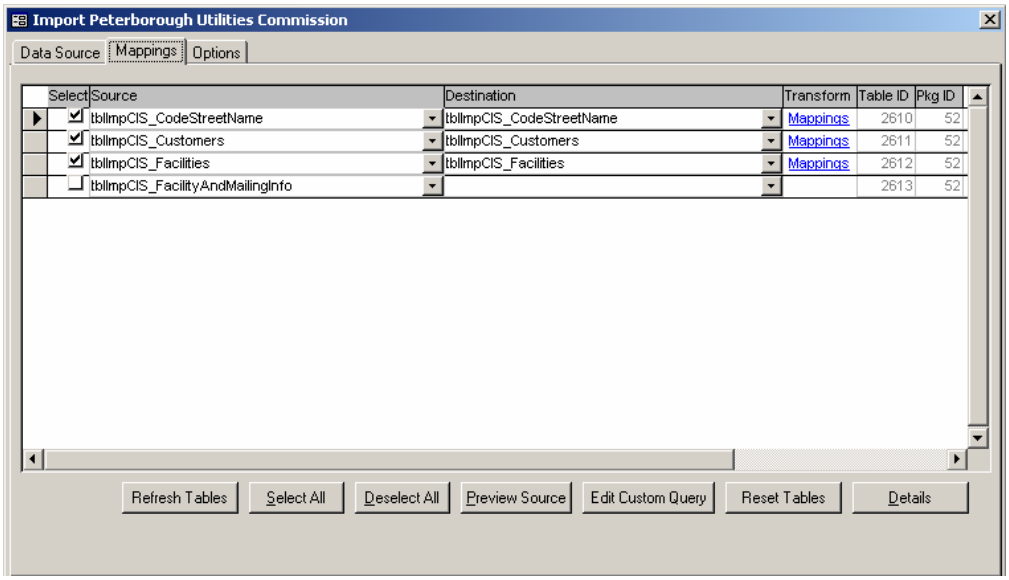
The BPMS Import/Export application allows to keep your customer mailing information up to date by importing data from your Customer Information Systems (a.k.a. Utility Billing system).

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.



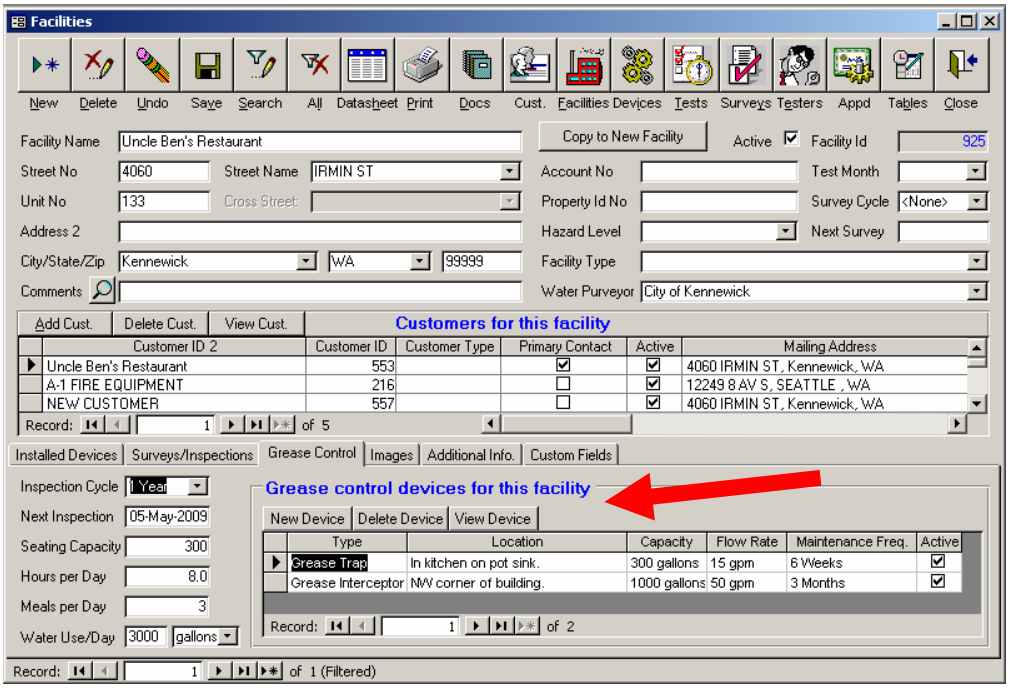
New Grease Control Module

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.

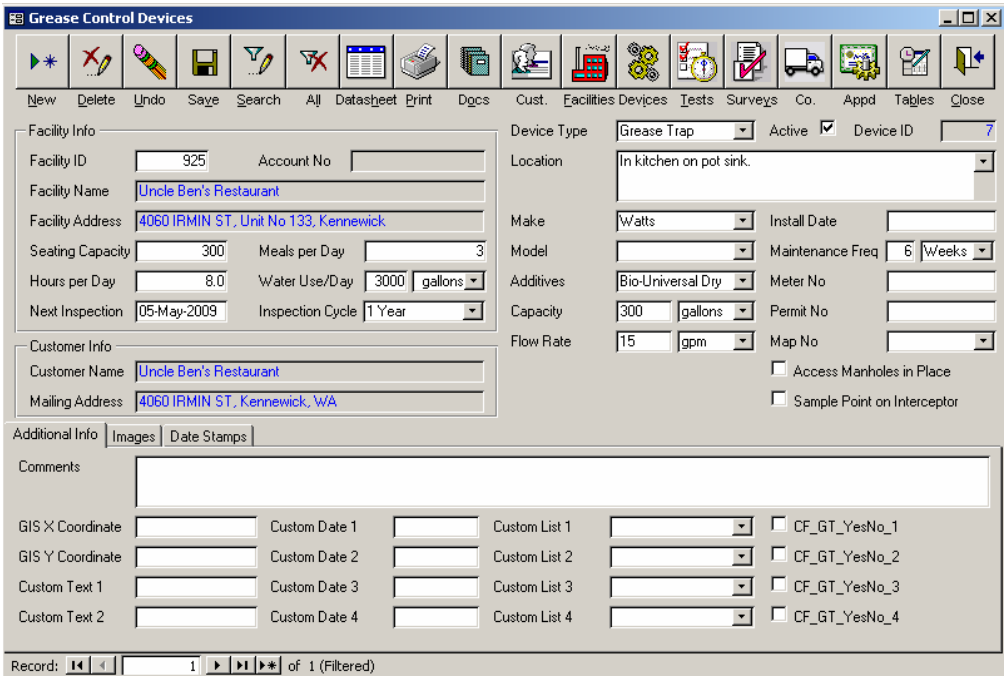
Facilities form has a new "Grease Control" tab

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.



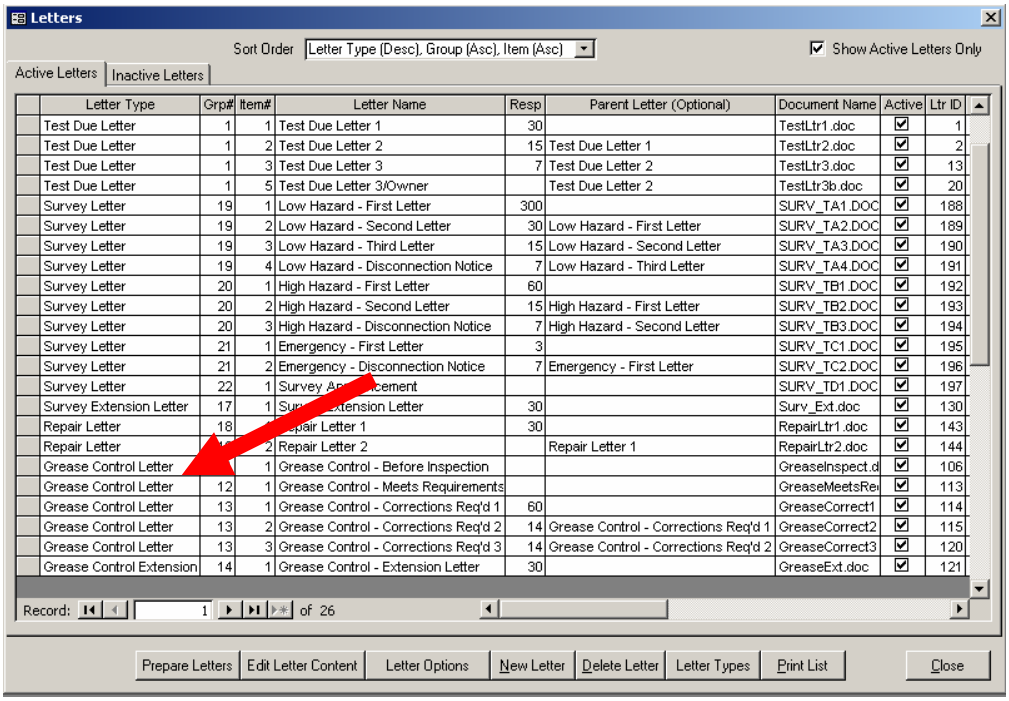
Grease Control Devices form

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



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.



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*".