



## BPMS SOFTWARE

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VANCOUVER, BC V5Z 4B2

# BPMS 7 Administrator - What's New

Version 1.0

Last Updated: 15 July 2017

Prepared By: BPMS Software

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## BPMS Administrator Enhancements and Changes

### Important Information for Users Upgrading from Version 6

If you upgraded from version 6 to version 7 and use the Survey module to send Survey Letters or Grease Control Letters, please follow instructions in "[Appendix A – Important Information for Users who Upgraded from V6 to V7](#)" on page 18.

### Reminder Enhancements (v7.01w - 29-Mar-2017)

Two new options have been added to letters to provide more flexibility including the option to prepare the letter x days "Past Due Date".

The screenshot shows the 'Letter Preferences' dialog box. The 'Prepare Letter (show in Reminder)' field is highlighted in yellow and contains a dropdown menu with three options: '30 Days', 'Before Due Date', and 'Past Due Date'. A red arrow points to the 'Prepare Letter' field. The 'Active' checkbox is checked. The 'Letter Name' is 'Test Due Commercial Notice 1' and the 'Letter Type' is 'Test Due Letter'. The 'Document Name' is 'Test Due Commercial Notice 1.doc' and the 'Actual No of Days to Respond' is '30 (leave blank if no response req'd)'. The 'Letter Description (optional)' is 'First test due letter. One letter per device.'.

On the Reminder form, two new columns were added to show current settings. You can also manually update those values on the Reminder form. The changes are temporary until you close the form. If you change the value you need to click on button shown by arrow #2 to refresh the Reminder. The button shown by arrow #3 can be used to re-query all letters with default settings configured on under letter options (screen shot above).

Reminder

**The following items may require your attention**

No of Items	Prepare Letters	Type	Description	Details	Prepare Next Letter
958	15 Days Past Due Date	Test Due Letter	Test Due Commercial Notice 1	Details..	Prepare...
19	0 Days Before Due Date	Test Due Letter	Test Due Commercial Notice 2	Details..	Prepare...
3	0 Days Before Due Date	Test Due Letter	Test Due Commercial Notice 3	Details..	Prepare...
5	0 Days Before Due Date	Test Due Letter	Final Letter Expired (Test Due Commercial Notice)	Details..	Prepare...
3739	30 Days Before Due Date	Test Due Letter	Test Due Residential Post Card 1	Details..	Prepare...
8	0 Days Before Due Date	Test Due Letter	Test Due Residential Post Card 2	Details..	Prepare...
21	0 Days Before Due Date	Test Due Letter	Final Letter Expired (Test Due Residential Post Card)	Details..	Prepare...
5	30 Days Before Due Date	Grease Control Letter	Grease Control - Initial Inspection	Details..	Prepare...
3	30 Days Before Due Date	Grease Control Letter	Grease Control - Reminder	Details..	Prepare...
54	30 Days Before Due Date	Company - Tester Certification	Tester Certification	Details..	Prepare...
3	0 Days Before Due Date	Company - Tester Certification	Final Letter Expired (Tester Certification)	Details..	Prepare...
135	30 Days Before Due Date	Company - Test Kit Calibration	Company - Test Kit Calibration Ltr 1	Details..	Prepare...
135	30 Days Before Due Date	Company - Test Kit Calibration	Company - Tester Certification Ltr 1	Details..	Prepare...

Record: 2 of 13

Time to Open: 00:00:06 Facility ID Filter (Survey Letters):

### Why the Option to Send Letter “Past Due Date”

A few of our customer have reported that some of their customers are pretty good at staying on top of the annual testing on their own or with a reminder from the testing company so they would like to delay sending the “First notification letter”. They would like the option to send the letter once the test is overdue by x number of days. In that context it makes sense to send the first letter past the due date.

### Reports can be made Active/Inactive on the Report List

The Reports form now allows you to make reports active and inactive. The form has 3 tabs. The first one shows Active Reports only. The 2<sup>nd</sup> one shows Inactive Reports only and the 3<sup>rd</sup> one shows All Reports.

Reports

Active Reports | Inactive Reports | All Reports

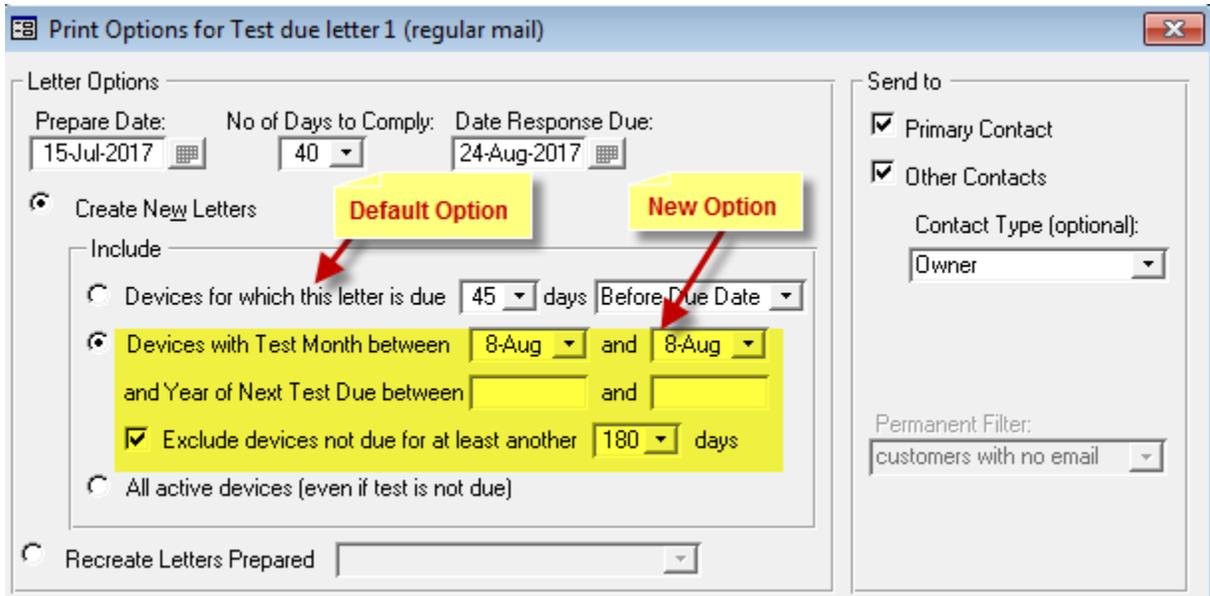
Report Description	Report Name	Active	Report ID
High Hazard Facilities or Systems	rptHighHazardFacilities	<input checked="" type="checkbox"/>	33
List of Approved Devices by Make, Model and Size	rptListOfApprovedDevicesByMakeModelAndSize	<input checked="" type="checkbox"/>	15
List of Approved Devices by Type, Make, Model and Size	rptListOfApprovedDevicesByTypeMakeModelAndSize	<input checked="" type="checkbox"/>	26
List of Assemblies Tested By Tester Company	rptListOfAssembliesTestedByTesterCompany	<input checked="" type="checkbox"/>	39
List of Assemblies that Failed their Final Test	rptListOfInstallsWhereFinalTestFailed	<input checked="" type="checkbox"/>	49
List Of Assembly Images By Address And Location	rptListOfAssemblyImagesByAddressAndLocation	<input checked="" type="checkbox"/>	21
List of Customers by Account No	rptListOfCustomersByAccountNo	<input checked="" type="checkbox"/>	4
List of Customers By Name	rptListOfCustomersByName	<input checked="" type="checkbox"/>	2
List of Customers with Duplicate CustomerID2	rptListOfCustomersWithDuplicateCustomerID2	<input checked="" type="checkbox"/>	60
List of Devices and Installation History	rptListOfDevicesAndInstallHistory	<input checked="" type="checkbox"/>	1
List of Devices Tested by Jurisdiction, Facility Name/Address	rptTestsByJurisdiction	<input checked="" type="checkbox"/>	35
List of Facilities by Account No	rptListOfFacilitiesByAccountNo	<input checked="" type="checkbox"/>	34
List of Facilities by Facility ID	rptListOfFacilitiesByFacilityID	<input checked="" type="checkbox"/>	59
List of Facilities by Facility Name and Address	rptListOfFacilitiesByFacilityName	<input checked="" type="checkbox"/>	51
List of Facilities by Hazard Level	rptListOfFacilitiesByHazardLevel	<input checked="" type="checkbox"/>	50
List of Facilities by Hazard Level with Facility/Hazard Type	rptListOfFacilitiesByHazardLevelWithFacilityType	<input checked="" type="checkbox"/>	54
List of Facilities with no Active Backflow Device	rptListOfFacilitiesWithNoBackflowDevice	<input checked="" type="checkbox"/>	65
List of Facilities with No Active Backflow Device with Survey Letters	rptListOfFacilitiesWithNoBackflowDeviceWithSurvLetters	<input checked="" type="checkbox"/>	68
List of Facilities with Pending Surveys	rptListOfFacilitiesWithPendingSurveys	<input checked="" type="checkbox"/>	58
List of Facilities with Total Number of Devices by Acct No	rptListOfFacilitiesWithNewOrRemovedDevicesByAcctNo	<input checked="" type="checkbox"/>	37
List of Installs and Test History	rptListOfInstallsAndTestHistory	<input checked="" type="checkbox"/>	9
List of Installs by Account No	rptListOfInstallsByAccountNo	<input checked="" type="checkbox"/>	11
List of Installs by Address	rptListOfInstallsByStreetAddress	<input checked="" type="checkbox"/>	5
List of Installs by Address and Facility Name	rptListOfInstallsByAddressAndFacilityName	<input checked="" type="checkbox"/>	19

Record: 14

[Edit List](#)
[Edit Report](#)
[Refresh List](#)
[Select All](#)
[Clear All](#)
[Run Report](#)
[Close](#)

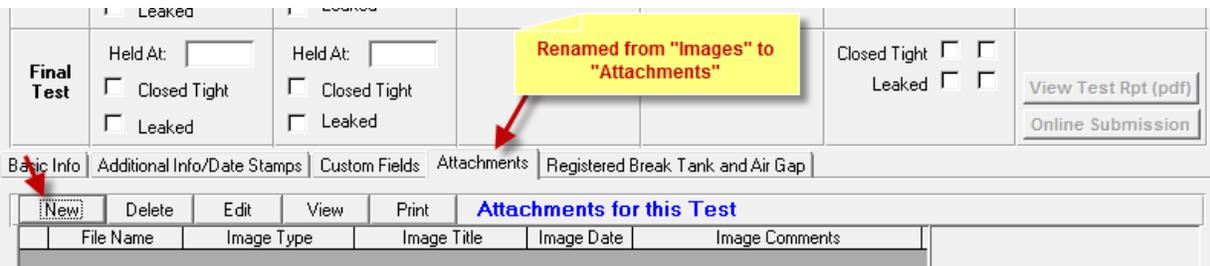
## Test Due Letter – New Options on Dialog Box

On the Test Due Letter dialog box, we added a few options highlighted below. These options are used by Testing Companies to send reminders to their customers. It can be also used by municipalities and water purveyors, as long as it is used consistently.



## Enhancements to Attachments (formerly Images)

The tab formerly named Images was renamed to Attachments.



When you click the **New** button, the Import or Link to File dialog box has changed.



There are now 3 ways to select a file to attach or link to as shown by arrows 1, 2 and 3 on screen shot.

1. Check the box **Show Folders and Files** check box then select the file from list that will appear in the left pane. This is the same way as in version 6. The folders and files are no longer loaded because it is very slow when the folder has hundreds of subfolders and files.

2. Click the **Browse** button to open the file using Windows File Explorer. This can be much faster than option 1 if you have a lot of files in source folder.
3. You can copy and paste the file path from Windows File Explorer into the **File Name** text box.

## Survey Related Changes and Enhancements

### New Option to Flag Survey as “Cancelled”

A new check box labelled “Cancelled” was added. Use this option to leave a record that a Survey occurred but you have decided not to pursue enforcement for whatever reason, such as another Survey was conducted more recently.

The screenshot shows the 'Surveys/Inspections' form. The 'Cancelled' checkbox is located at the bottom right of the form, next to the 'Meets All Requirements' checkbox. A red arrow points to the 'Cancelled' checkbox, which is currently checked. Other fields include Facility ID (5906), Facility Name (1518095 ONTARIO INC (CAR CANAL), Activity Type (CCC Survey), Survey ID (448), Date Surveyed (14-May-2013), and Surveyed by (Tim Davis).

### Options to Search for Pending Surveys

On the Facilities, when you click Search, you can search for **No of Surveys Pending** for facilities with one or more pending surveys. A survey is defined as Pending (a.k.a. Outstanding) until either the **Meets All Requirements** or **Cancelled** boxes are checked. This search is especially helpful to review if you have more than one outstanding survey for a facility.

The screenshot shows the 'Facilities' search dialog box. The search criteria are: Field: No of Surveys Pending, Comparison: Greater Than or Equal, Value: 2. A yellow callout box with a red arrow points to the 'Value' field, containing the text 'Multiple outstanding Surveys'. The 'Advanced Search' tab is selected, and the 'SHOW ALL' button is visible.

### Changes to Formula that Calculates how Survey Items Appear in Reminder

Items that appear in the Reminder for Survey Letters in version 7 (v7) may be different than items that appear in Reminder in version 6 (v6), even with the same data for the following reasons.

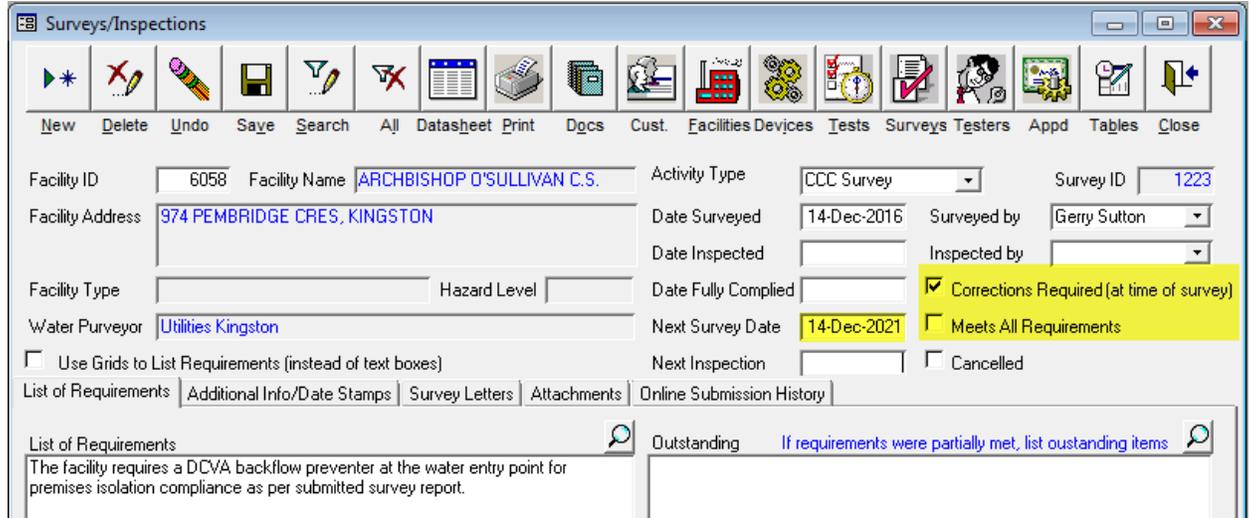
- 1) In v7, each Survey Record for a Facility is Independent form other Surveys

In v6, for a given Facility, only the most recent survey record was used and showed in Reminder, even if the Meets Requirements box was left unchecked on other pending (outstanding) survey records for that same facility.

In v7 if you have more than one outstanding Survey Record (**Meets All Requirements** and **Cancelled** boxes are unchecked) then they may both appear in the Reminder at the same time.

This scenario should be rare.

- 2) In v6, if Next Survey Date had a future date as shown in the example below, then follow up survey letters (Letter item # 2 and up) would not appear in the Reminder until that date. In v7, it will appear in the reminder until either the Meets All Requirements or Cancelled box are checked.



In v6, the assumed workflow was that users would not update the **Next Survey Date** until the box **"Meets All Requirements"** was checked. BPMS would then calculate the Next Survey Date automatically. However, sometimes the user would manually update the Next Survey Date even when requirements were not met. This prevented the items due for another letter from appearing in the reminder.

## Survey Form Changes and Enhancements

The survey form now gives you the option of entering the List of Requirements in grids instead of large text boxes. If the box **“Use Grids for Requirements (instead of text boxes)”** is checked, the tab **“List of Requirements”** will show two grids, one for Premise Isolation (a.k.a. Containment) and another one for Internal Protection.

The screenshot shows the 'Surveys/Inspections' application window. The 'List of Requirements (Grids)' section is active, showing two tables. A red arrow points to the checkbox 'Use Grids for Requirements (instead of text boxes)' which is checked.

Facility ID: 13030 Facility Name: YRCC 875 Activity Type: CCC Survey Survey ID: 2163  
 Facility Address: 8380 Kennedy Rd Date Surveyed: 03-Nov-2014 Surveyed by: James Bond  
 Facility Type: Commercial Premises Hazard Level: Md-Sev Date Inspected: Inspected by:  
 Water Purveyor: Corrections Required:  Meets All Requirements:   
 Use Grids for Requirements (instead of text boxes)

List of Requirements (Grids) | Additional Info/Date Stamps | Survey Letters | Attachments | Online Submission History

No Premise Isolation found  Show Outstanding Requirements Only

Premise Isolation (Containment)										
	Imp. Status	Service Type	Device Location	Haz. Lvl	Original Protection	Serial No	Last Tested	Acceptable?	Recomm'd Protection	Comments
▶	Unimplemer		meter room	High	RP	1234	03-Nov-2014	No		
	Unimplemer		meter room	High	DCVA	4567	03-Nov-2014	No	RP	

Record: 1 of 2

No Cross-Connection found

Fixture/Zone/Area Isolation										
	Imp. Status	Business Name	Device Location	Haz. Lvl	Original Protection	Serial No	Last Tested	Acceptable?	Recomm'd Protection	Comments
▶	Unimplemer	A Inc.	boiler makeup	High	DCVA	6543	03-Nov-2014	No	RP	
	Unimplemer	A Inc.	irrigation system	Mod	SCVA	9876	03-Nov-2014	No	DCVA	
	Unimplemer	A Inc.	Pressure Wash	Mod	None	456789	03-Nov-2014	No	DCVA	

The data entry form has two sections, the top half of the form is filled out from the initial field survey. The bottom half of the form, if required, is entered either after the Test Report has been received or after the final inspection.

**Premise Isolation**

**Survey Report Info** (Sections filled out during field Survey)

Service Type: Domestic | Metered Service: Yes

Device Location: Mechanical Room

Hazard Level: High

Original Protection Type: DCVA (Protection at time of Survey Report)

Device Serial No: 4567 (S/N at time of Survey Report)

Device Last Tested: 03-Nov-2014

Original Protection Acceptable?: No (Indicates if protection at time of Survey Report was acceptable.)

Recommended Protection Type: RP

Survey Comments: Replace DCVA by RP

**Implementation Report Info** (Section filled out after corrections have been implemented)

Implementation Status: Unimplemented

Implemented Protection Type: [ ]

Date Implemented: [ ]

New Device Serial No: [ ]

Date of Initial Test: [ ] | Initial Test Submitted?: No

Implementation Comments: [ ]

**Water Meter Details**

Meter Serial No: [ ] | Water Account No: [ ]

Meter Size: [ ] | Water Service No: [ ]

Meter Location: [ ]

**Additional Info**

Premise Isolation ID: 18

Survey ID: 2163

Facility ID: 13030

GPS Latitude: [ ]

GPS Longitude: [ ]

GPS Elevation: [ ]

Install ID: [ ]

Device Serial No: [ ]

Next Test Date: [ ]

Device Type: [ ]

Device Make: [ ]

Device Model: [ ]

Size: [ ]

Date Created: 17-Nov-2014

Time Created: 2:37:42 PM

Created By: RQF

Date Modified: 07-Dec-2014

Time Modified: 9:03:05 PM

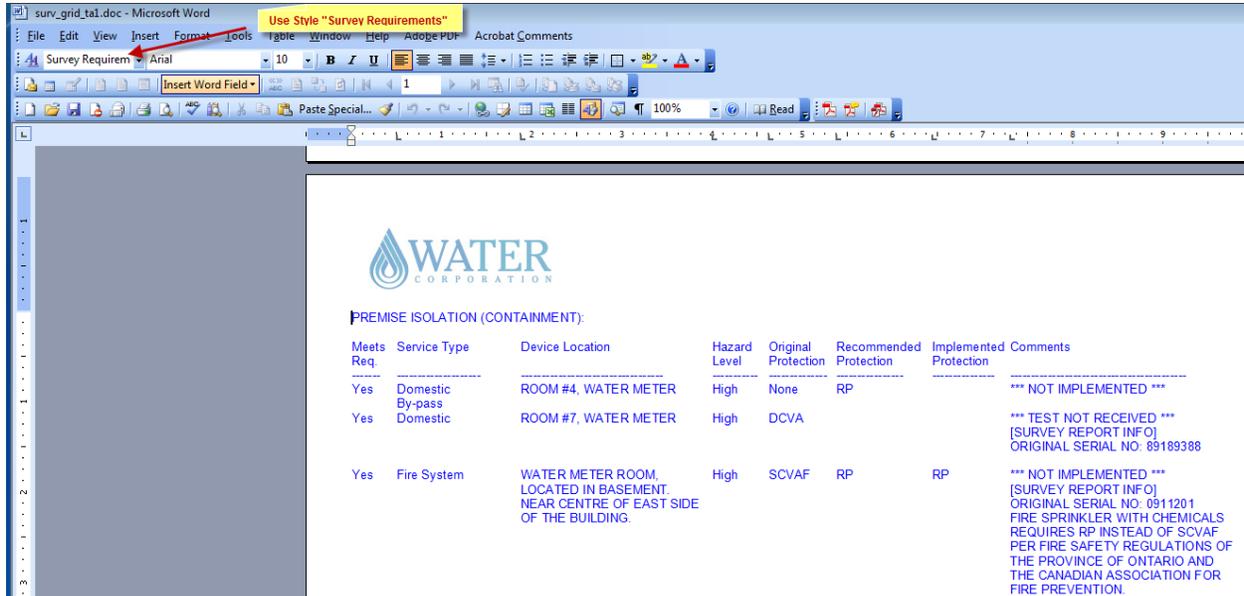
Modified By: BPMSSoftware

Buttons: Add New Backflow Device | Go to Backflow Device | OK | Cancel

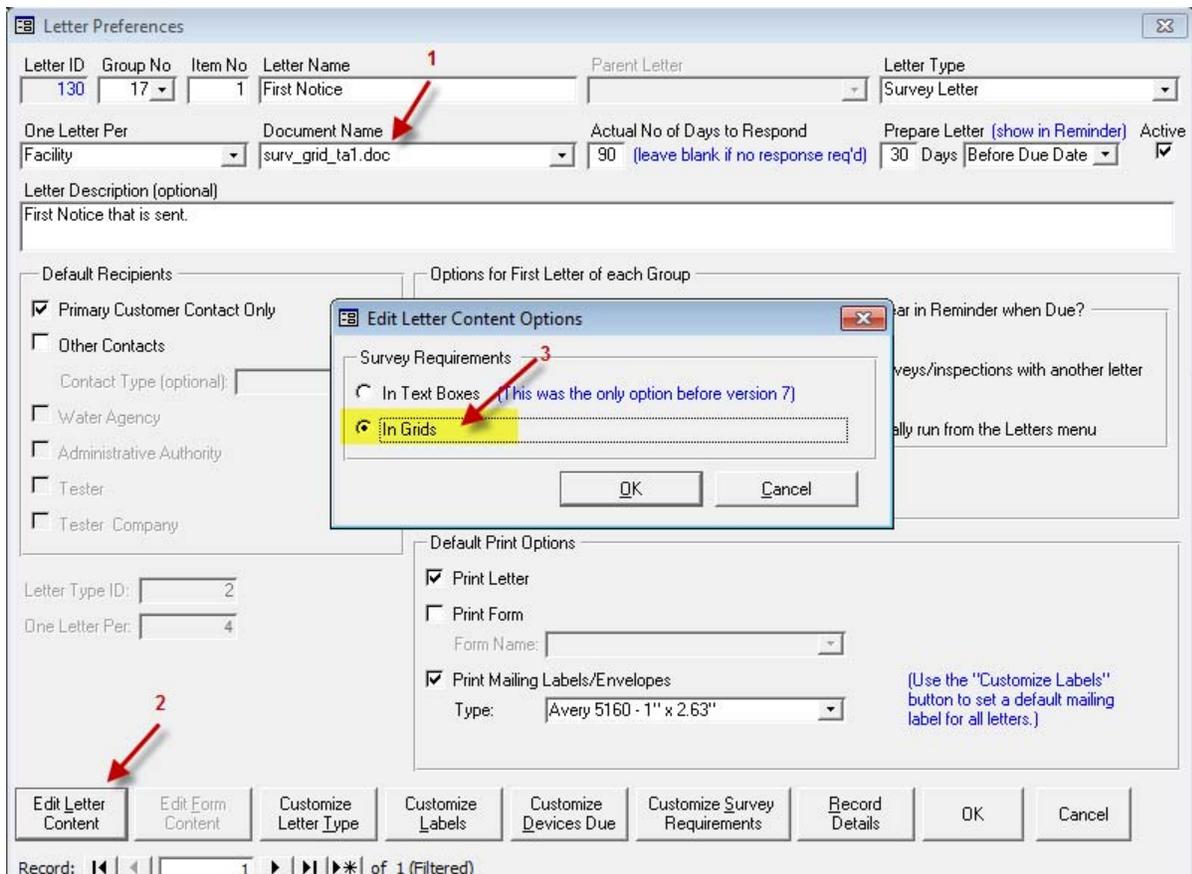
Option to add new device (points to Add New Backflow Device button)

## Survey Letters when using Grids for Requirements

When using grids to enter survey requirements, the new mail merge field “SURV\_REQ”, used in with style “**Survey Requirements**” allows you to display individual requirementst for each cross-connection in tabular format as shown on screen shot below.



Use word document named **surv\_grid\_ta1.doc** as template.



## Test Form – Validate Tester Company Business License (v7.01v)

On the Test Report form, upon entering the Tester Name or Certification No, if the check boxes highlighted below on the Customize form is checked then BPMS will check the Business License Expiry date on both, the Tester form and the Tester Company form.

The screenshot shows the 'Customize BPMS' dialog box with the 'Test' tab selected. Under the 'Test Options' section, the 'Display Warning When' group contains three checked items: 'Tester's Certification Expired', 'Test Kit/Gauge Calibration Expired', and 'Business License Expired' (which is highlighted in yellow). Below this, 'Populate Test Kit S/N from Tester Info' is also checked. To the right, the 'Reduced Pressure Assembly' group has 'Enable Check Valve 2 Psid' checked and 'Enable Backsiphonage Info' unchecked. At the bottom, 'Default Next Test Day' is set to '<Same as Last Test Day>'.

If both forms have a value in field Business License Expired dates, the warning will appear only if both of them are expired. If only one date is populated and the date is expired then a warning message will appear.

## Multiple users can now reliably prepare letters at the same time

In version 6 with SQL Server back-end, if two or more users were preparing survey letters at the same time, the selection of recipients of one user could overwrite the selection of another user. This issue has been resolved in version 7.

## New Reports

### ***Report #1 - Summary of Test Results Entered by Device Type and Hazard Level***

The report provides a count of the number of test reports entered into the database over a particular period of time.

**SUMMARY OF TESTS ENTERED BY DEVICE TYPE AND HAZARD LEVEL**

City of Markham  
For Period between 01-Jan-2013 and 31-Dec-2013

Device Type	Hazard Level	First Time Test	Test after Replacement	Annual/Semi Annual Test	Total
<b>DC</b>					
	Unclassified	21	0	3	24
	<b>Total - DC</b>	<b>21</b>	<b>0</b>	<b>3</b>	<b>24</b>
<b>DCDA</b>					
	Unclassified	1	0	0	1
	<b>Total - DCDA</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>1</b>
<b>DCVA</b>					
	Min	0	0	1	1
	Unclassified	93	5	332	430
	<b>Total - DCVA</b>	<b>93</b>	<b>5</b>	<b>333</b>	<b>431</b>
<b>PVB</b>					
	Unclassified	22	2	38	62
	<b>Total - PVB</b>	<b>22</b>	<b>2</b>	<b>38</b>	<b>62</b>
<b>RP</b>					
	Sev	0	0	1	1
	Unclassified	112	5	409	528
	<b>Total - RP</b>	<b>112</b>	<b>5</b>	<b>410</b>	<b>527</b>
<b>RPF</b>					
	Unclassified	0	1	0	1
	<b>Total - RPF</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>1</b>
<b>SRPVB</b>					
	Unclassified	0	1	0	1
	<b>Total - SRPVB</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>1</b>
<b>SVB</b>					
	Unclassified	2	0	0	2
	<b>Total - SVB</b>	<b>2</b>	<b>0</b>	<b>0</b>	<b>2</b>
<b>&lt;All&gt;</b>					
	Min	0	0	1	1
	Sev	0	0	1	1
	Unclassified	251	14	782	1,047
	<b>Total - &lt;All&gt;</b>	<b>251</b>	<b>14</b>	<b>784</b>	<b>1,049</b>

The report provides a count of the number test reports which are due to be submitted for any time period within the next year. This helps to forecast work volumes.

Print Options
×

For Period between:  and

Device Type

Hazard Level

Water Purveyor

Report Title:

SUMMARY OF TESTS ENTERED BY DEVICE TYPE AND HAZARD LEVEL

Sub-Title:

City of Markham  
 For Period between 01-Jan-2013 and 31-Dec-2013

### Report #2 - Summary of Test Backlog and Upcoming Test

The report provides a count of the number test reports which are due to be submitted for any time period within the next year. This helps to forecast work volumes.

SUMMARY OF TEST BACKLOGGED AND UPCOMING TEST														
City of Markham														
For Period between 01-Oct-2013 and 30-Sep-2013														
*Backlogs	2013-10	2013-11	2013-12	2014-01	2014-02	2014-03	2014-04	2014-05	2014-06	2014-07	2014-08	2014-09	Total	
Test Due	882	151	164	105	53	50	180	225	146	183	154	10	4	2,307

\* Backlog means that test was due before 01-Oct-2013

Printed: 2014-10-01 11:33:08 AM

Page 1 of 1

### Report #2 - Print Options

**Options:**

For Period between: 01-Oct-2013 and 30-Sep-2013

Water Purveyor (leave blank for all):

Report Title:  
SUMMARY OF TEST BACKLOGGED AND UPCOMING TEST

Sub-Title:  
City of Markham  
For Period between 01-Oct-2013 and 30-Sep-2013

Preview Report Print Report Close

### Report #3 - List of Active Facilities with No Active Backflow Devices

List of facilities have not installed a premise isolation backflow device or that have not submitted a test report to date.

Facility ID	Customer ID	Account No	Street No	Street Name	City	State	Postal Zip Code	Hazard Level	Customer Name	Mailing Address
9522	2820	7201190	7225	Woodbine Ave	Markham	ON	L3R 1A3	Mod	2251257 ont inc o/a CHELSEA SQUARE LIMITED	7225 WOODBINE AVE SUITE 103, MARKHAM, ON
9578	6421	7400940	555	Alden Rd	Markham	ON	L3R 3L5	Mod	TECH DIGITAL MANUFACTURING LIMITED	555 Alden Rd, Markham, ON
9613	3358	7310870	8920	Woodbine Ave	Markham	ON	L3R 9W9	Mod	UB EXECUTIVE OFFICES INC	303 - 8920 WOODBINE AVE, MARKHAM, ON
9638	3678	7206030	7181	Woodbine Ave	Markham	ON	L3R 1A3	Mod	The Huntley Group	1 Valleybrook Dr, Suite 102, Toronto, ON

### Report #3 - Print Options

**Print Options**

AND Hazard Level: Mod

AND Facility Type: <All>

AND Zip Code begins with: L3 (leave blank for all)

AND Water Purveyor: <All>

Report Title:  
List of Active Facilities with No Active Backflow Device

Sub-Title:  
City of Markham  
AND Hazard Level = 'Mod'

Preview Report Print Report Close

### Report #4 - List of Testing Companies with Expired Certification

LIST OF TESTING COMPANIES WITH EXPIRED CERTIFICATION												
City of Markham For Period between 01-Jan-2014 and 31-Dec-2014												
Company Name	Address	Phone Number	Email	Bus. Lic. Expires	Insurance Expires	Tester ID	Full Name	Certification No	Tester Cert. Expires	Inspector Cert. Expires	Plumbing Lic. Expires	Certification Agency
A & A Plumbing & Mechanical Services	31 Carpenter Court, Markham, ON	905-471-7772	No Email Address Available	05-Feb-2014	27-Jul-2014							
						476	Tony Petti	08264	22-Sep-2013			
A-1 Plumbing & Drain Ltd	1212-1600 Sandhurst Cir, Scarborough, ON	416-867-6032	info@oneplumbing.com	11-Aug-2014	30-Aug-2014							
						168	Mirza Moughal	09550	28-Dec-2014			OWWA
Active Mechanical Inc	89 Shorncliffe Rd, Toronto, ON	416-799-8410	service@activemechanical.com	28-Oct-2013	19-Nov-2013							
						454	James Parkes	01370	06-Nov-2013			OWWA
						455	Gerald Diver	09094	26-Jan-2013			OWWA
						456	Den Quirk	10099	16-Jul-2013			OWWA
						457	Clinton Camala	10388	07-Nov-2013			OWWA
Ainsworth Inc	131 Bermondsey, Toronto, ON	416-564-1009	manny_white@ainsworth.com	27-May-2014	01-Apr-2014							
						461	Manfred White	11110	07-Nov-2014			OWWA
Almor Mechanical Ltd	101 Freshway Dr, Unit 40, Concord, ON	905-669-6224	almormechnical@hotmail.com	10-Feb-2014	18-Apr-2013							
						231	Massimo Peretto	09049	06-Dec-2013			AWWA
Anfield Mechanical	3585 Laird Road, Unit 4, Mississauga, ON	905-569-7877 Ext 102	hazel.anfield@bellnet.ca	30-Jun-2013	13-Sep-2013							
						480	Jeremy Leblanc	08031	13-Dec-2013			owwa
Ansell Mechanical Ltd	56 Lily Lake Road, Peterborough, ON	705-740-2000										

### Report #4 - Print Options

**Print Options**

**Options:**

For Period between:  and

Report Title:

Sub-Title:

Include the following information if it expires during the reporting period

- Business License
- Insurance Policy
- Test Kit Calibration

Include records that expired before the reporting period

## Report #5 - List of Testing Companies with Expired License or Equipment Calibration

rptTesterCoWithExpiredCalibration : Report

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**LIST OF TESTING COMPANIES WITH EXPIRE D EQUIPMENT CALIBRATION**  
City of MarkhamFor Period between 01-Jan-2014 and 31-Dec-2014

Company Name	Address	Phone Number	Email	Bus. Lic. Expires	Insurance Expires	Test Kit ID	Serial No	Make	Model	Primary User	Calibration Expires
A & A Plumbing & Mechanical Services	31 Carpenter Court, Markham, ON	905-471-7772	No Email Address Available	09-Feb-2014	27-Jul-2014						
A-1 Plumbing & Drain Ltd	1212-1600 Sandhurst Cir, Scarborough, ON	416-367-6052	info@aoneplumbing.com	11-Aug-2014	30-Aug-2014	388	05080875	Apollo	40-200-TKSU	Tony Pettit	13-Nov-2013
Active Mechanical Inc	89 ShomoLife Rd, Toronto, ON	416-795-5410	service@activemechanical.com	29-Oct-2013	19-Nov-2013						
						460	0128389	Watts	TK-99E	Kris Kaspruwicz	02-May-2013
						461	10081803	Mid-West	845-5	Kris Kaspruwicz	02-May-2013
						462	10081804	Mid-West	845-5	Kris Kaspruwicz	02-May-2013
						463	11091803	Mid-West	845-5	Kris Kaspruwicz	26-Mar-2013
						464	02090252	Mid-West	845-5	Kris Kaspruwicz	26-Mar-2013
Ainsworth Inc	131 Bermondsey, Toronto, ON	416-554-1009	manly_white@ainsworth.com	27-May-2014	01-Apr-2014						
						369	01124132	ZurMWilkins	TG-5	Manfred White	04-Feb-2014

## Report #5 - Print Options

Print Options

**Options:**

For Period between:  and

Report Title:

Sub-Title:

Include the following information if it expires during the reporting period

- Business License
- Insurance Policy
- Test Kit Calibration

Include records that expired before the reporting period

## Appendix A – Important Information for Users who Upgraded from V6 to V7

If you just have upgraded from version 6 to version 7 and you use the Survey module to send letters for Cross Connection, Grease or Amalgam control, please read this section carefully.

As described in section [“Changes to Formula that Calculates how Survey Items Appear in Reminder”](#) on page 7, version 7 has a different way of determining which items should appear in the Reminder for Survey and Grease control type letters.

We recommend that you follow the steps below shortly after migrating from version 6 to version 7 to avoid sending letters to customers.

### Part 1 – Review Letters

#### ***Make sure letters are mutually exclusives***

If you have more than one group of letters dependent on the same field, make sure they are mutually exclusive. On screen shot below, we have 3 groups of survey letters highlighted: Low Hazard, High Hazard and Emergency. They all depend on field **ChangesRequired** (the Corrections Required check box on the Survey from). You need to make sure that in the Reminder, the facility will receive the appropriate letter and only one.

Letter Type	Grp#	Item#	Letter Name	Resp	Parent Letter (Optional)	Document Name	Letter Depends On Field	Prepare Letters	Action
Test Due Letter	1	1	Test Due Letter 1	30		TestLtr1.doc	NextTestDate	30 Days Before	<input checked="" type="checkbox"/>
Test Due Letter	1	2	Test Due Letter 2	30	Test Due Letter 1	TestLtr2.doc	NextTestDate	0 Days Before D	<input checked="" type="checkbox"/>
Test Due Letter	1	3	Test Due Letter 3	15	Test Due Letter 2	TestLtr3.doc	NextTestDate	0 Days Before D	<input checked="" type="checkbox"/>
Survey Letter	19	1	Low Hazard - First Let	300		SURV_TA1.DOC	ChangesRequired	30 Days Before	<input checked="" type="checkbox"/>
Survey Letter	19	2	Low Hazard - Second	30	Low Hazard - First Letter	SURV_TA2.DOC	ChangesRequired	0 Days Before D	<input checked="" type="checkbox"/>
Survey Letter	19	3	Low Hazard - Third Le	15	Low Hazard - Second Letter	SURV_TA3.DOC	ChangesRequired	0 Days Before D	<input checked="" type="checkbox"/>
Survey Letter	19	4	Low Hazard - Disconn	7	Low Hazard - Third Letter	SURV_TA4.DOC	ChangesRequired	0 Days Before D	<input checked="" type="checkbox"/>
Survey Letter	20	1	High Hazard - First Let	60		SURV_TB1.DOC	ChangesRequired	30 Days Before	<input checked="" type="checkbox"/>
Survey Letter	20	2	High Hazard - Second	15	High Hazard - First Letter	SURV_TB2.DOC	ChangesRequired	0 Days Before D	<input checked="" type="checkbox"/>
Survey Letter	20	3	High Hazard - Disconn	7	High Hazard - Second Letter	SURV_TB3.DOC	ChangesRequired	0 Days Before D	<input checked="" type="checkbox"/>
Survey Letter	21	1	Emergency - First Lette	3		SURV_TC1.DOC	ChangesRequired	30 Days Before	<input checked="" type="checkbox"/>
Survey Letter	21	2	Emergency - Disconne	7	Emergency - First Letter	SURV_TC2.DOC	ChangesRequired	0 Days Before D	<input checked="" type="checkbox"/>
Survey Letter	22	1	Facilities with Survey t			SURV_SLD1.DO	NextSurveyDate	30 Days Before	<input checked="" type="checkbox"/>
Survey Extension	17	1	Survey Extension Lette	30		Surv_Ext.doc		30 Days Before	<input checked="" type="checkbox"/>
Repair Letter	18	1	Repair Letter 1	30		RepairLtr1.doc	SendRepairLetter	30 Days Before	<input checked="" type="checkbox"/>
Repair Letter	18	2	Repair Letter 2	30	Repair Letter 1	RepairLtr2.doc	SendRepairLetter	0 Days Before D	<input checked="" type="checkbox"/>

There are two ways of doing this.

### Option 1 - First Letter won't appear in Reminder

If you set the option **First Letter to appear in Reminder** when Due to **No** as shown below then it won't be a problem because you are manually sending the first letter.

The screenshot shows the 'Letter Preferences' dialog box for Letter ID 182. The 'Letter Name' is 'Emergency - First Letter' and the 'Letter Type' is 'Survey Letter'. The 'Actual No of Days to Respond' is 3. The 'Prepare Letter' option is set to 'Before Due Date'. In the 'Options for First Letter of each Group' section, the 'First Letter to appear in Reminder when Due?' option is set to 'No, I will manually run from the Letters menu'. A red arrow points to this option.

### Option 2 – Apply a Permanent Filter

If you want the first letter to appear in the Reminder then you can apply a permanent filter to each letter in a group to make that mutually exclusive. In example below, we apply a permanent filter to separate low hazard facilities from high hazard facilities.

The screenshot shows the 'Letter Preferences' dialog box for Letter ID 175. The 'Letter Name' is 'Low Hazard - First Letter' and the 'Letter Type' is 'Survey Letter'. The 'Actual No of Days to Respond' is 300. The 'Prepare Letter' option is set to 'Before Due Date'. In the 'Options for First Letter of each Group' section, the 'First Letter to appear in Reminder when Due?' option is set to 'Yes'. A 'Permanent Filter/Sort' is applied: 'Low Hazard Facilities'.

To apply a Permanent filter, from the Letters form, select the first letter in a group then click **Letters Options** button then on the **Permanent Filter/Sort** drop down, select **<New>**. Set up the filter then click OK then give a name to your filter.

**Letters Dependent on Field NextSurveyDate should have Letter Type “Survey Required Letter”**

Letters that Depend on Field Next Survey Date should have the Letter Type set to “Survey Required Letter” instead of “Survey Letter”.

Letter Type	Grp#	Item#	Letter Name	Resp	Parent Letter (Optional)	Document Name	Letter Depends On Field	Prepare Letters	Acti
Test Due Letter	1	1	Test Due Letter 1	30		TestLtr1.doc	NextTestDate	30 Days Before	<input checked="" type="checkbox"/>
Test Due Letter	1	2	Test Due Letter 2	30	Test Due Letter 1	TestLtr2.doc	NextTestDate	0 Days Before D	<input checked="" type="checkbox"/>
Test Due Letter	1	3	Test Due Letter 3	15	Test Due Letter 2	TestLtr3.doc	NextTestDate	0 Days Before D	<input checked="" type="checkbox"/>
Survey Letter	19	1	Low Hazard - First Let	300		SURV_TA1.DOC	ChangesRequired	30 Days Before	<input checked="" type="checkbox"/>
Survey Letter	19	2	Low Hazard - Second	30	Low Hazard - First Letter	SURV_TA2.DOC	ChangesRequired	0 Days Before D	<input checked="" type="checkbox"/>
Survey Letter	19	3	Low Hazard - Third Le	15	Low Hazard - Second Letter	SURV_TA3.DOC	ChangesRequired	0 Days Before D	<input checked="" type="checkbox"/>
Survey Letter	19	4	Low Hazard - Disconn	7	Low Hazard - Third Letter	SURV_TA4.DOC	ChangesRequired	0 Days Before D	<input checked="" type="checkbox"/>
Survey Letter	20	1	High Hazard - First Let	60		SURV_TB1.DOC	ChangesRequired	30 Days Before	<input checked="" type="checkbox"/>
Survey Letter	20	2	High Hazard - Second Letter	15	High Hazard - First Letter	SURV_TB2.DOC	ChangesRequired	0 Days Before D	<input checked="" type="checkbox"/>
Survey Letter	20	3	High Hazard - Third Letter	7	High Hazard - Second Letter	SURV_TB3.DOC	ChangesRequired	0 Days Before D	<input checked="" type="checkbox"/>
Survey Letter	21	1	Emergency - First Lette	3		SURV_TC1.DOC	ChangesRequired	30 Days Before	<input checked="" type="checkbox"/>
Survey Letter	21	2	Emergency - Disconne	7	Emergency - First Letter	SURV_TC2.DOC	ChangesRequired	0 Days Before D	<input checked="" type="checkbox"/>
Survey Letter	22	1	Facilities with Survey I			SURV_SLD1.DO	NextSurveyDate	30 Days Before	<input checked="" type="checkbox"/>
Survey Extension	17	1	Survey Extension Lette	30		Surv_Ext.doc		30 Days Before	<input checked="" type="checkbox"/>
Repair Letter	18	1	Repair Letter 1	30		RepairLtr1.doc	SendRepairLetter	30 Days Before	<input checked="" type="checkbox"/>
Repair Letter	18	2	Repair Letter 2	30	Repair Letter 1	RepairLtr2.doc	SendRepairLetter	0 Days Before D	<input checked="" type="checkbox"/>

Setting the Letter Type to “Survey Required Letter” is recommended if you are sending a letter either to inform a customer that you will be conducting a survey or to ask them to hire a qualified person to conduct the survey. It will ensure that:

- a) When a Survey Record is created from this letter, the box “**Corrections Required (at time of survey)**” will not be checked. This is more appropriate since you don’t know if there corrections are required until the survey is conducted.
- b) When the box **Corrections Required** is checked, it will stop sending a follow up Survey Required Letters

This is especially important if the survey is done by a private company, the Survey Required Letters are to ensure that the customer will hire a qualified person. Once the survey is done, if corrections are required, the Corrections Required box is checked and requirements are entered. The appropriate notice is then sent (e.g. High Hazard – First Letter) either right away or later on as part of the batch of letters.

**Part 2 – Review Pending Surveys**

1. Open the Facilities form then click Search button

- Under Quick Search tab, set options as shown below then click OK

**Search Facilities**  
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:

- If results are found click **Apply Filter** button

Click the Surveys/Inspections tab. The lines where the last two columns are unchecked are known as Pending Surveys. The last column has column heading CXLD for "Cancelled".

**Facilities**

Facility Name: MARTYRS' SHRINE | Copy to New Facility | Active  | Facility Id: 34

Street No: 16163 | Street Name: 12 HWY | Account No: | Test Month: 7-Jul

Unit No: | Cross Street: | Property Id No: | Survey Cycle: 5 Year

Address 2: | Hazard Level: Medium | Next Survey: 29-Jul-2014

City/State/Zip: Midland | ON | Facility Type: CHURCH

Comments: FIRE SERVICE ONLY- NO DOMESTIC NO ACCT IN DIAMOND | Water Purveyor: Town of Midland

**Customers for this facility**

Customer Name	Cust. ID	Cust. Type	Primary Contact	Active	No Mail Upd	Mailing Address
JESUITS IN ENGLISH CANADA	29			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	43 Queen's Park, Crescent E., Toronto, ON

Record: 1 of 1

**Surveys/Inspections for this facility**

Survey ID	Activity Type	Date Surveyed	Date Inspected	Last Letter Sent	Date Sent	Resp. Due	Date Completed	Meets Req	CXLD
907	CCC Survey			Midland - First Response to Survey	15-Jan-2015	16-Mar-2015		<input type="checkbox"/>	<input type="checkbox"/>
294	CCC Survey	25-Aug-2006	29-Jul-2009	Midland - First Response to Survey	10-Jun-2009	07-Aug-2009	04-Aug-2009	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Record: 1 of 2

Record: 1 of 151 (Filtered)

To cancel a survey, double-click the desired record to view the Survey details then check the “Cancelled” box. You may want to change the Next Survey Date to a future date if you want the even to appear in the Reminder in the future.

Facility ID: 34 Facility Name: MARTYRS' SHRINE Activity Type: CCC Survey Survey ID: 907  
 Facility Address: 16163 12 HWY, Midland Date Surveyed: Surveyed by:  
 Date Inspected: Inspected by:  
 Facility Type: CHURCH Hazard Level: Medium Date Fully Complied:  Corrections Required (at time of survey)  
 Water Purveyor: Town of Midland Next Survey Date: 29-Jul-2014  Meets All Requirements  
 Use Grids to List Requirements (instead of text boxes) Next Inspection:  Canceled

- If results are found click **Apply Filter** button

Click the Surveys/Inspections tab. The lines where the last two columns are unchecked are known as Pending Surveys. The last column has column heading CXLD for “Cancelled”.

- If you have more than 2 pending surveys with the same Activity Type as in the example below, you open the survey record for each. If they trigger the same letter, you should cancel one of them to avoid sending the same type of letter twice for the same facility. For example, in our example below, the two rows highlighted both have the box “Corrections Required” checked, which means it could cause letters in the same group to appear in the Reminder for the same facility (separate letter for each survey).

Facility Name: BORSA WHOLESALE Copy to New Facility: Active  Facility Id: 97  
 Street No: 516 Street Name: EASY ST Account No: Test Month: 7-Jul  
 Unit No: Cross Street: Property Id No: Survey Cycle: 5 Year  
 Address 2: Hazard Level: Low Next Survey: 01-Jul-2013  
 City/State/Zip: Midland, ON L4R 3M6 Facility Type: COMMERCIAL  
 Comments: NO WATER METERS NO ACCOUNT TAX ROLL ONLY Water Purveyor: Town of Midland

**Customers for this facility**

Customer Name	Cust. ID	Cust. Type	Primary Contact	Active	No Mail Upd	Mailing Address
BORSA WHOLESALE INC.	264		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	290 KING STREET, MIDLAND, ON

Record: 1 of 1

**Surveys/Inspections for this facility**

Survey ID	Activity Type	Date Surveyed	Date Inspected	Last Letter Sent	Date Sent	Resp. Due	Date Completed	Meets Req	CXLD
757	CCC Survey							<input type="checkbox"/>	<input type="checkbox"/>
614	CCC Survey			Midland - First Response to Survey	13-Jan-2014	13-Mar-2014		<input type="checkbox"/>	<input type="checkbox"/>
36	CCC Survey	02-Aug-2006	14-Jul-2008				14-Jul-2008	<input checked="" type="checkbox"/>	<input type="checkbox"/>



## Appendix B – Example of Discrepancies between Items in Reminder in V6 versus V7

Discrepancies in Survey Letters and Grease Control Letters are possible because of changes in the formula that determines if a survey should appear in the Reminder. If you notice a difference right after installing the program (before any updates are done in either version), take a screen shot of the REMINDER items in both version then email it to BPMS support. We will need to get a copy of your BPMS 6 Admin database to review the differences.

### V6

The following items may require your attention

Show first letters due within  Remind of other events due within

No of Items	Type	Description	Details	Prepare Next Letter
49	Tester Certification Letter	Tester Certification	Details...	Prepare...
91	Test Due Letter	Test Due Letter 1	Details...	Prepare...
367	Test Due Letter	Test Due Letter 2	Details...	Prepare...
213	Test Due Letter	Test Due Letter 3	Details...	Prepare...
12	Test Due Letter	Final Letter Expired (Test Due Letter 3)	Details...	Prepare...
30	Survey Letter	Midland - First Response to Survey Requirements	Details...	Prepare...
125	Survey Letter	Midland - Second Response to Survey Requirements	Details...	Prepare...
30	Survey Letter	Survey Announcement	Details...	Prepare...

Record:  of 8

Time to Open:

### V7

The following items may require your attention

Show first letters due within  Remind of other events due within

No of Items	Type	Description	Details	Prepare Next Letter
49	Tester Certification Letter	Tester Certification	Details...	Prepare...
91	Test Due Letter	Test Due Letter 1	Details...	Prepare...
367	Test Due Letter	Test Due Letter 2	Details...	Prepare...
213	Test Due Letter	Test Due Letter 3	Details...	Prepare...
12	Test Due Letter	Final Letter Expired (Test Due Letter 3)	Details...	Prepare...
34	Survey Required Letter	Survey Announcement	Details...	Prepare...
34	Survey Letter	Midland - First Response to Survey Requirements	Details...	Prepare...
133	Survey Letter	Midland - Second Response to Survey Requirements	Details...	Prepare...
1	Survey Letter	Midland - Final Response to Survey Requirements	Details...	Prepare...
2	Survey Letter	Final Letter Expired (Midland - Disconnection Notice)	Details...	Prepare...

Record:  of 10

Time to Open:  Facility ID Filter (Survey Letters):

Sample explanation for discrepancies.

BPMS 7 Admin – What' New

No	No of Items (V6)	No of Items (V7)	Discrepancy (v7 – v6)	Type	Description	Discrepancy Details
1	30	34	4	Survey Letter	Midland – First Response to Survey Requirements	4 facilities appear twice in v7 because they have 2 outstanding surveys. Facility ID: 70, 400, 550, 559. I will fix it in BPMS 7 so only the latest one shows up. Meanwhile, you should check the "Cancelled" box on oldest Survey record when you see a duplicate.
2	125	133	8	Survey Letter	Midland – Second Response to Survey Requirements	Facility IDs in v7 only: 97, 407, 465, 514, 519, 524, 551, 584 (no Next Survey Date – in v6, those don't come up in Reminder). In v7 letter will come up in reminder even if another survey record is created later (unless a letter of the same type was sent in a newer survey). In v6, a letter appears in the reminder only for the last survey record.
3	0	1	1	Survey Letter	Midland – Final Response to Survey Requirements	Facility ID 499 comes up in v7 only. In v6 if there is no Next Survey Date like this one they don't come up in Reminder.
4	0	2	2	Survey Letter	Final Letter Expired (Midland – Disconnection Notice)	Facility ID 141 and 165. Same as above.
5	30	34	4	Survey Letter	Survey Announcement	Same as #1. 4 facilities appear twice in v7 as they have 2 outstanding surveys. Facility ID: 13, 462, 550