



# Projects

---

Questions? From your BS&A program, go to **Help>Contact Customer Support** and select **Request Support Phone Call** or **Email Support**. Or, you may call us at (855) 272-7638 and ask for the appropriate support department. Questions for our I.T. department may be submitted by phone (same number), or by emailing [tech@bsasoftware.com](mailto:tech@bsasoftware.com).

Projects group all requirements for a new job into one record: permits, inspections, certificate of occupancy, etc. Building Department .NET is able to track all of this activity by letting you define all the elements of a project.

## Setting Up Project Types

1. Go to **Program Setup>Database Setup>Project Types**.
2. Click  **Add**.
3. Enter the Project Type (name of the project).
4. Click  to select the **Numbering Format** to use for the current project type (create a new one by clicking the Edit Record button in the dialog).
5. Check -  - the **Auto-link Inspections to Projects** box to make the setup of the project requirements (next step) much easier, as inspections will not need to be added to the requirement list. Upon adding the inspection to a permit on the project, the program automatically creates a link to the project.
6. Click **Project Requirements** and set up the requirements (see the next section - "Project Requirements" - for assistance).
7. Click **Inspections** in the event you need to add an inspection type that is unique to the current project type.

## Project Requirements

Clicking the  button on Project Type Setup opens the Modify Project Requirements screen.

Project requirements set here can be modified on an individual basis without affecting the settings here in Program Setup.

**Add Button.** Click to add requirements:

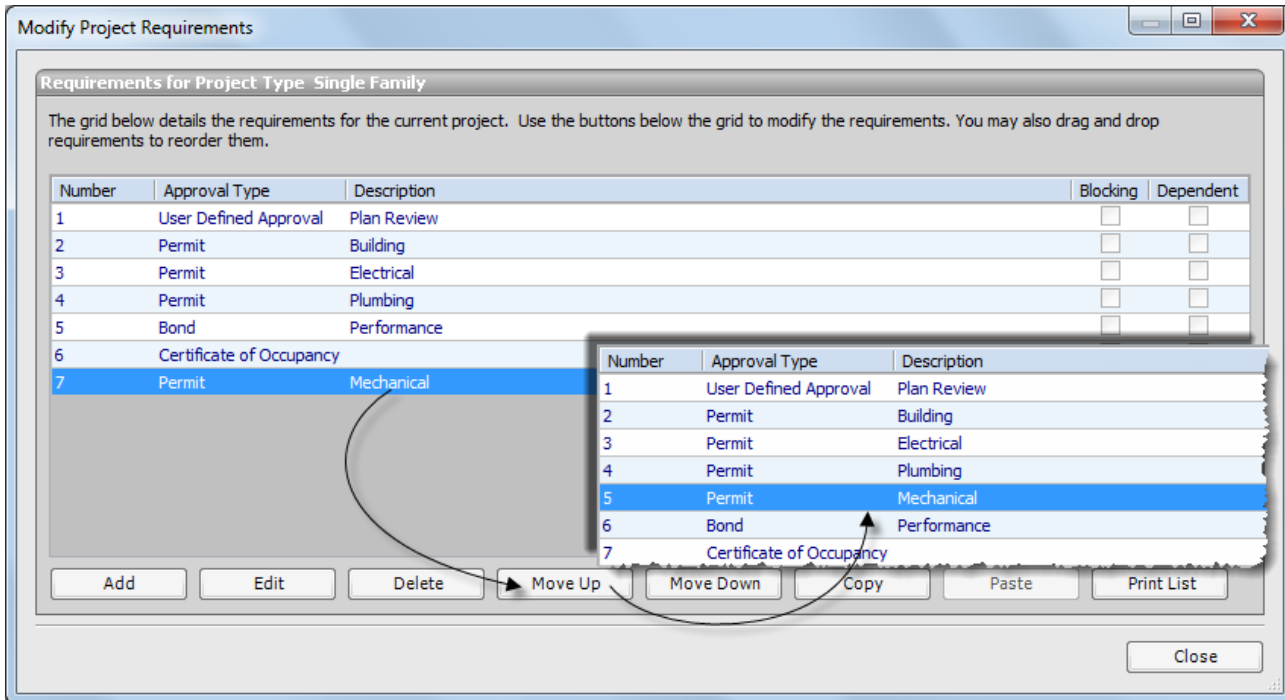
- o User-Defined Approval
  - Brings up a list of prerequisites that must be approved on projects of the current type before the next requirement (another approval, or a permit) can be added.
  - User Approval Types are set up separately in Program Setup.
- o Inspection
  - Brings up a list of Inspection Types defined for projects, permits, and certificates of occupancy.
  - Inspection Types are set up separately in Program Setup.
  - Inspections will not need to be added as requirements if you choose to auto-link them.
- o Permit
  - Brings up a list of the permit types in your database.
- o Certificate of Occupancy
  - Adds C of O as a requirement.
- o Bond
  - Brings up a list of the bond types in your database.

**Edit Button.** Click to set the Blocking and Dependent status:

- o Blocking
  - When checked, no subsequent requirement may be initiated until the "blocking" one has been completed.
- o Dependent
  - When checked, the requirement cannot be initiated until all prior requirements have been completed.

**Delete Button.** Click to delete the currently-highlighted requirement.


**Move Up/Move Down Buttons.** Click to change the order of the currently-highlighted requirement.



**Copy; Paste Buttons.** Use these buttons to copy/paste requirements from one project type to another.

For example, you've set up a project type with 10 requirements. Eight of them would be useful for another project type. [Ctrl]+click to select the requirements and click Copy. Go to the next Project Type>Project Requirement and click Paste.

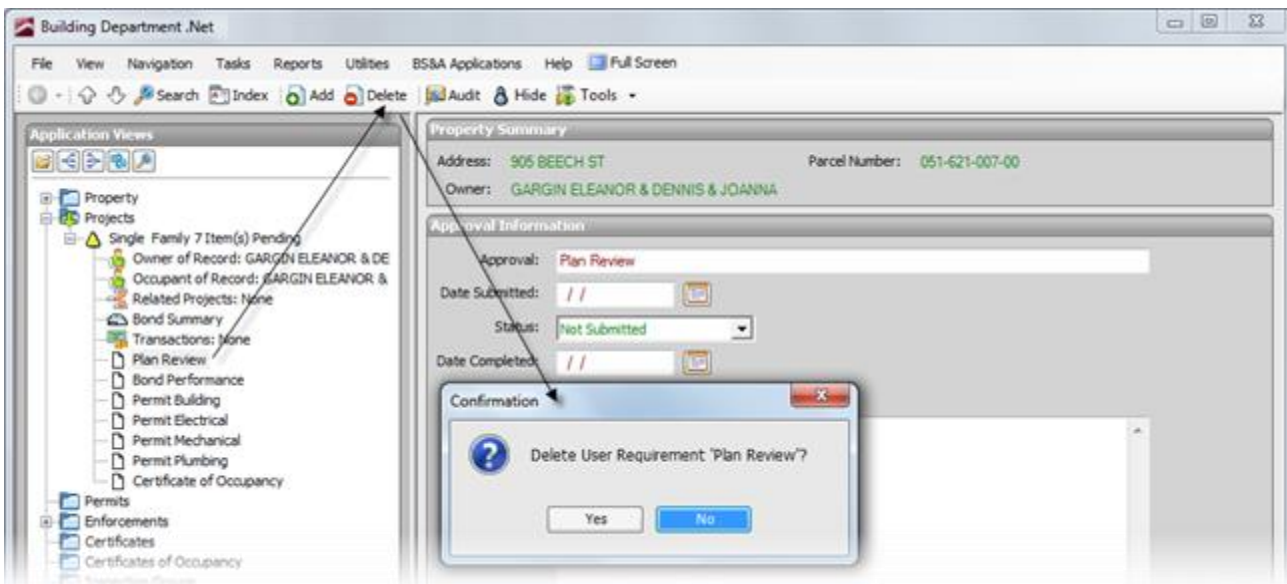
## Adding the Project

1. Locate the property and highlight any folder in Application Views.
2. Click .
3. Double-click **Add New Project**.
4. Double-click the **Type**.

The project is added and you can begin adding its requirements (next page).

## Removing a Requirement

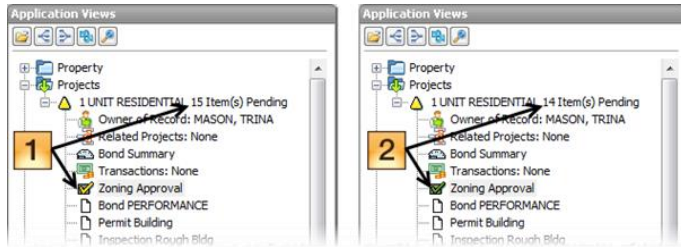
Occasionally, a requirement may not be necessary on a specific project. You may delete the requirement from the project on the property without affecting the Project Type from Program Setup:




## Starting/Fulfilling the Requirements

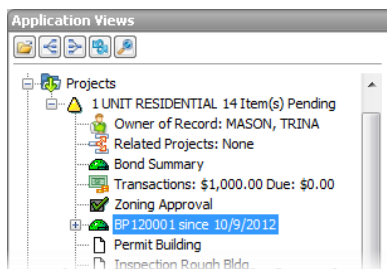
### User-Defined Approval

1. Locate the project and click the user-defined requirement (i.e., Zoning Approval, etc.).
2. When appropriate, enter the Date Submitted (1) and the Date Approved (2). The requirement's icon changes to reflect the status. Once approved, the pending items are reduced:



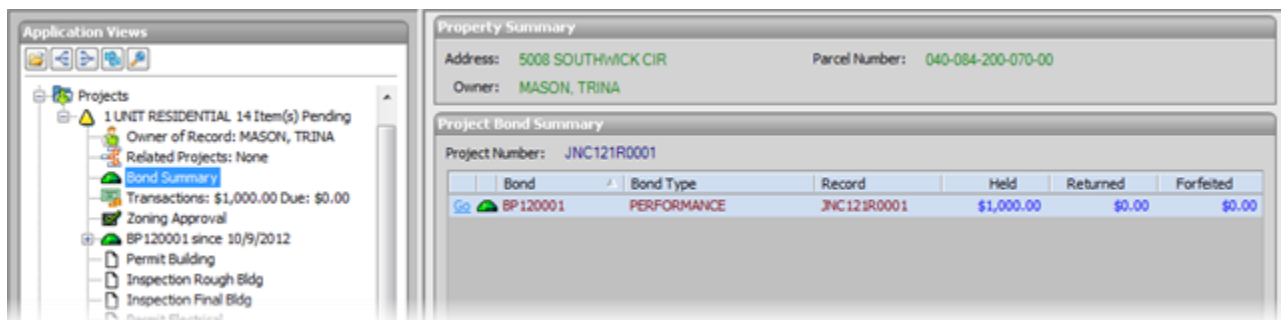
### Bond

1. Locate the project and click the bond requirement.
2. Click  or click the [Click here to attach...](#) command link to the right of Application Views.
3. Make your selection:
  - o Add New Bond  
If the bond has not already been added, and is the option used in these instructions.
  - o Link to Existing Bond  
If the bond has already been added. You will be prompted to search for it.
4. Fill out the wizard fields and add the bond. The requirement's icon changes:




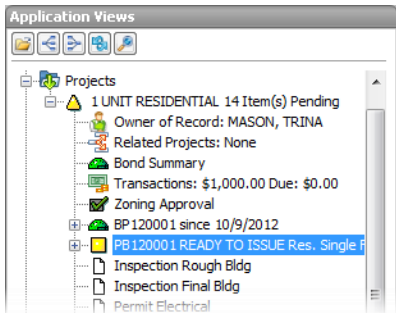
[n] Item(s) Pending will change when the bond money is returned, at which point this requirement will be considered fulfilled.

The Bond Summary node keeps a list of all bonds added to the project:



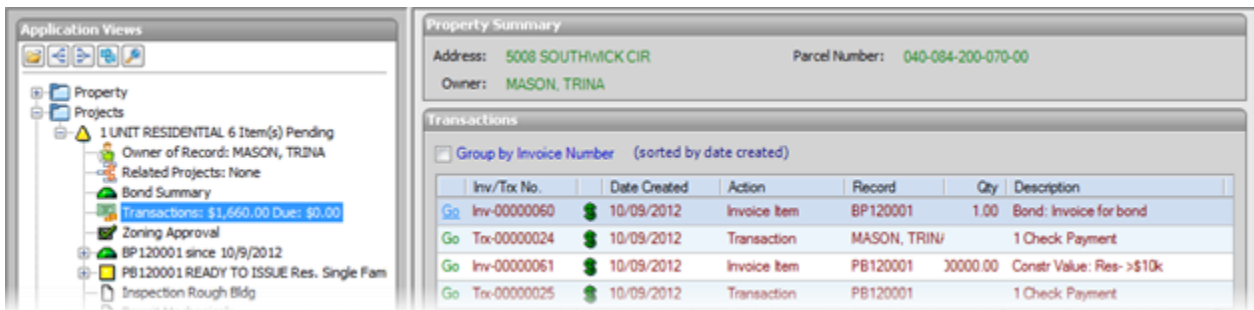
**Permit**

1. Locate the project and click the permit requirement.
2. Click  or click the [Click here to attach...](#) command link to the right of Application Views.
3. Make your selection:
  - o Add New Permit  
If the permit has not already been added, and is the method used in these instructions.
  - o Link to Existing Permit  
If the permit has already been added. You will be prompted to search for it.
4. Fill out the wizard fields and add the permit. The requirement's icon changes:




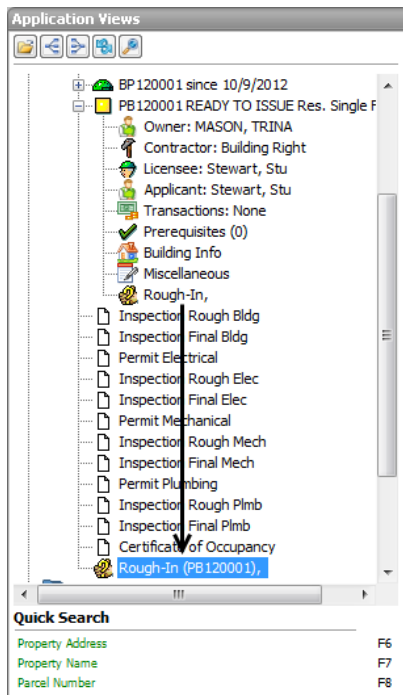
[n] Item(s) Pending will change when the permit is finalized, at which point this requirement will be considered fulfilled.

The Transactions node keeps a list of all transactions for the project (bonds, fees, etc.). You may pay invoices from here, but you cannot add new invoices. New invoices will need to be added to the appropriate record on the project (permit, inspection, etc.).




### Inspection (as an Auto-Link to the Project)

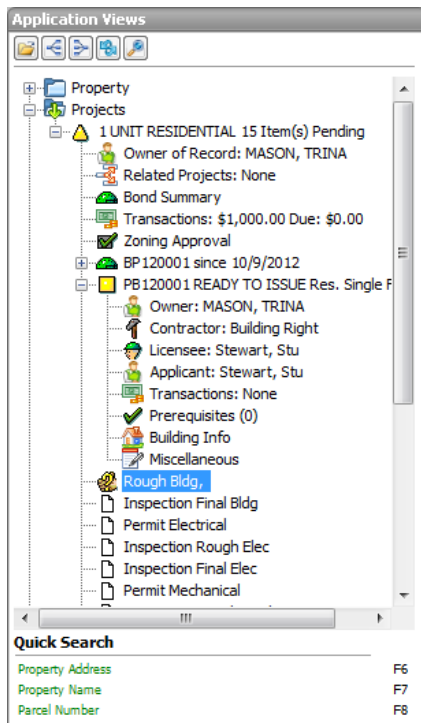
1. Locate the project and click the permit requirement to which you are adding the inspection.
2. Click .
3. Make your selection:
  - o Add New Inspection  
Adds the inspection without bringing up the scheduler, and is the method used in these instructions.
  - o Schedule Inspection  
Brings up the scheduler before adding the inspection.
4. Select the **Inspection Type**. It is added to the permit, and an inspection is added to the project:



[n] Item(s) Pending is not affected by auto-link inspections; however, if the inspection result is something other than Approved, you will be prompted to add another inspection.

### Inspection (as a Requirement)

1. Locate the project and click the inspection requirement.
2. Click  or click the [Click here to attach...](#) command link to the right of Application Views.
3. Make your selection:
  - o Add New Inspection  
Adds the inspection without bringing up the scheduler, and is the method used in these instructions.
  - o Schedule Inspection  
Brings up the scheduler before adding the inspection.
4. Verify or select the **Inspector**. The inspection is added.




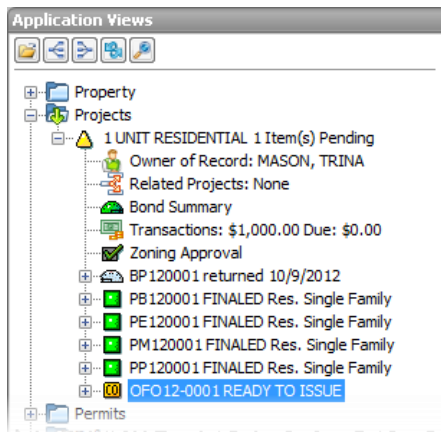
[n] Item(s) Pending will change when the inspection is Approved, at which point this requirement will be considered fulfilled. If the inspection result is something other than Approved, you will be prompted to add another inspection.



## Certificate of Occupancy

The requirement defaults to a final C of O, but you can select temporary. If you are adding a temporary C of O, you will need to add an additional certificate of occupancy requirement for the final.

1. Locate the project and click the certificate of occupancy requirement.
2. Click  or click the [Click here to attach...](#) command link to the right of Application Views.
3. Make your selection:
  - o Add New Certificate of Occupancy  
If the certificate of occupancy has not already been added, and is the option used in these instructions.
  - o Link to Existing Certificate of Occupancy  
If the certificate of occupancy has already been added. You will be prompted to search for it.
4. Fill out the wizard fields and add the certificate of occupancy. The requirement's icon changes:

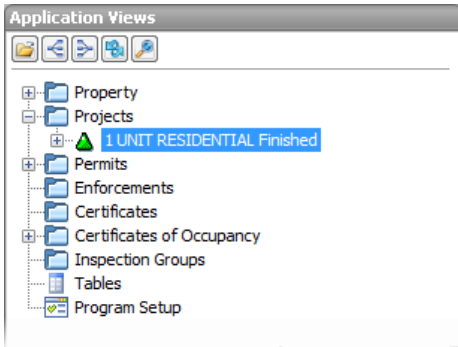


[n] *Item(s) Pending* will change when the (final) certificate of occupancy is issued, at which point this requirement will be considered fulfilled.

If the CO *Auto-link to permits on project* attribute is enabled, a [green](#) command link to this CO will appear on each of the project's permits. If disabled, a tool is available for you set the link.

## Completing a Project

As requirements are fulfilled, the number of items pending is reduced. Once all items are fulfilled, the Project Status changes to **Finished**:



## Reporting

Building Department .NET includes some system reports to aid in the tracking of currently-opened Projects.

Two of these are Project User Approvals and Project Financial Summary, both accessed by clicking the **Reports** menu and selecting **Projects** as the category.

### Project User Approvals

Shows you the Project's status and detail for each user-defined approval:

Printed: 06/15/2012

14965 Abbey Lane  
Bath, MI 48808  
517.555.5555  
Fax: 517.555.5555

**Financial Guarantees**

Complete (Finished)  
**New Residential**  
 J00000000006      1307 ESSEX ST      170-H10-001-005-00  
 Started: 05/25/2012

Approval	Date Started	Date Completed	Status	Amount
<input checked="" type="checkbox"/> Approved <b>Plan Review</b>	05/25/2012	06/15/2012	Approved	\$0.00
<input checked="" type="checkbox"/> Approved <b>Zoning Approval</b>		06/15/2012	Approved	\$0.00
Approved: 2	Not Yet Approved: 0		Total Amount:	\$0.00

Population: Current Record

### Project Financial Summary

Provides a snapshot of the Projects in your database, including permit fees owed and a total due for each Project.

Printed: 06/15/2012

14965 Abbey Lane  
Bath, MI 48808  
517.555.5555  
Fax: 517.555.5555

**Project Financial Summary**

Complete (Finished)  
**Project: New Residential**  
 J00000000006      1307 ESSEX ST      170-H10-001-005-00  
 Started: 05/25/2012

Paid	Amount Billed	Paid	Due
<input checked="" type="checkbox"/> Building P170-B12005 Addition-Commercial			
<b>Project Totals</b>	\$	\$	\$
			<b>Balance Due</b>

CHECKS PAYABLE TO: CITY OF BS&A  
 SUBMIT PAYMENTS TO: Treasurer's Office