Projects

*Questions? From within BS&A, 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 team. Questions for our I.T. team may be submitted by phone (same number), or by emailing itsupport@bsasoftware.com.*

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

Setting Up Project Types

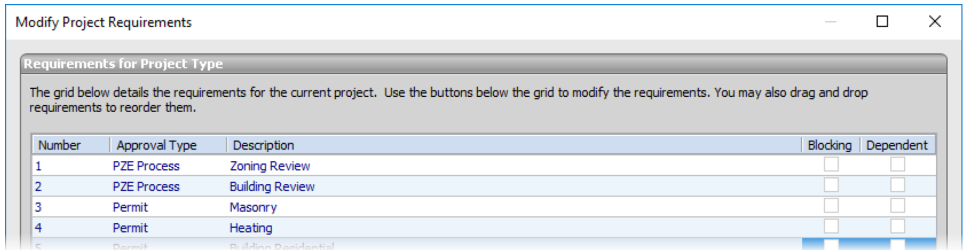
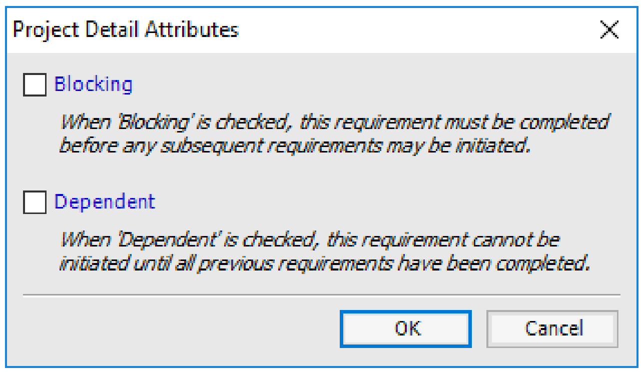
1. Go to Program Setup>Database Setup>Project Types.
2. Click the green Add button and enter the Project Type (name of the project).
3. Optional. Select the Default Basic Usage (Commercial, Residential, etc.; defaults to N/A).
4. Verify the Copy Work Description to Permits setting.
5. Select the Numbering Format.
6. Recommended. Check the Auto-link Inspections to Projects box. This makes the setup of Project Requirements much more efficient, because inspections will not need to be added to the requirement list. When you add the inspection to a permit on the project, the program automatically creates an inspection requirement on the project.
7. Click the Project Requirements button and set up the requirements (see the next section).
8. Click the Inspections button in the event you need to add an inspection type that is unique to the current project type.

Project Requirements

Project requirements that are set here in Program Setup can be modified on an individual basis (e.g., when a project is added to a property) without affecting the program setup.

1. Click the grey Add button and select the requirement.

User Defined Approval	This option brings up a list of prerequisites (User Approval Types, defined on Program Setup>Database Setup>Lists) that must be approved on projects of the current type before the next requirement (another approval or permit) can be added. User Defined Approval requirements can be used for items that fall outside the scope of a PZE Process (below).
Inspection	This option brings up a list of Inspection Types defined for projects, permits, and certificates of occupancy. Inspection Types are set up directly on Database Setup. Inspections will not need to be added as requirements if the Auto Link Inspections to Projects setting is turned on (see the section above).
Permit	This option brings up a list of the Permit Types in the database.
Certificate of Occupancy	This option adds CO as a requirement.
Bond	This option brings up a list of the Bond Types in the database.
Project	This option brings up a list of previously-created Project Types. This can be used if the current Project Type's scope includes another Project Type.

PZE Process	This option brings up a list of PZE Process Types, defined directly on Database Setup. Typical PZE Process Types are Building Plan Review and Zoning Review, which are usually among the first requirements to be completed before moving on to permits and their inspections (they will be at the top of the list): 
Regarding the “Blocking” and “Dependent” settings	If applicable, you will need to highlight the requirement and click the grey Edit button, then mark the appropriate setting. 
Regarding the “Copy” and “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.

2. If necessary, use the Move Up and Move Down buttons to place the requirements in their proper order.
3. Click Close to return to Project Setup.

Starting and Managing a Project

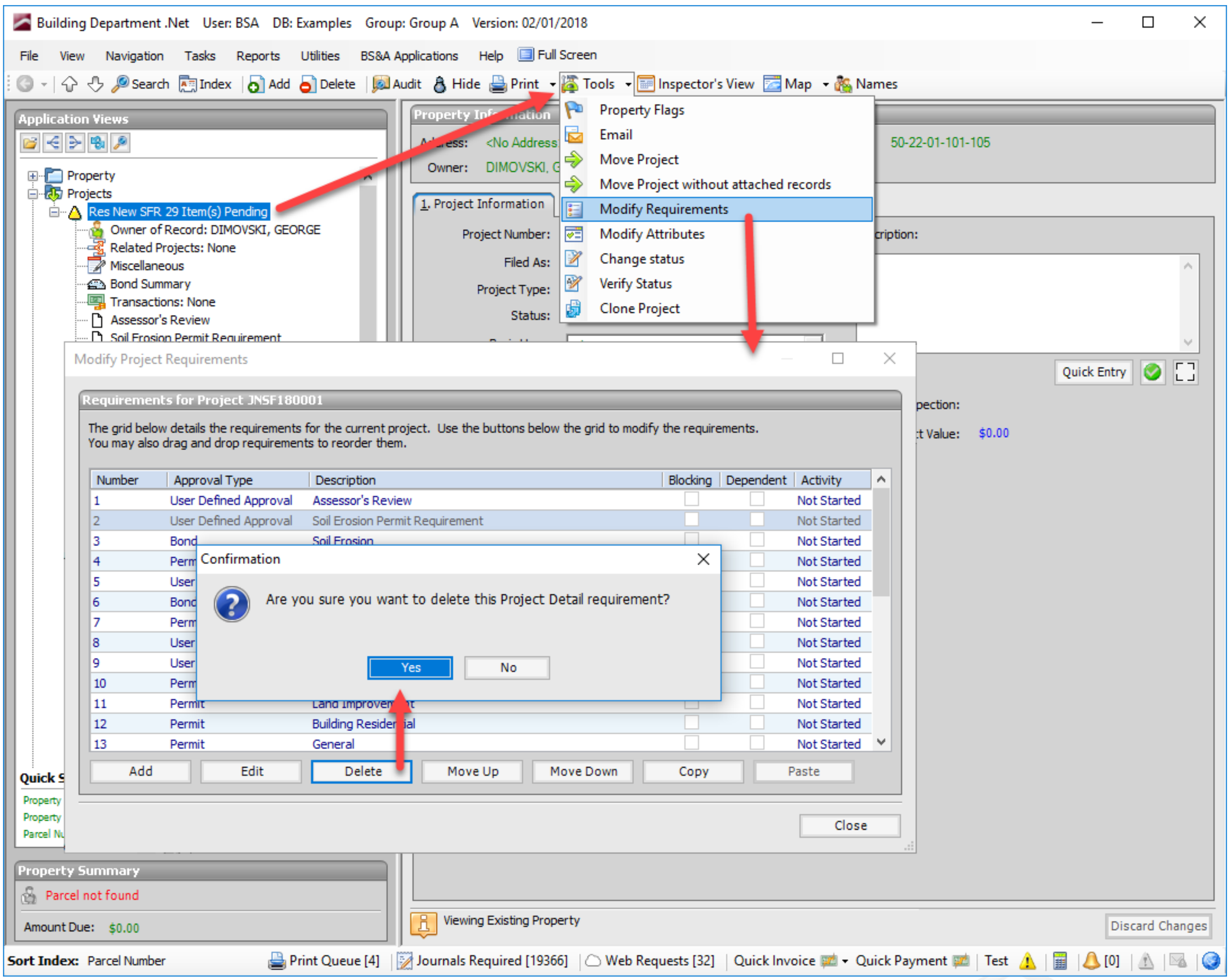
This section takes you through starting the project, fulfilling requirements, and completing the project. It is not an exhaustive recap of the individual requirements.

Start a Project

1. Locate the property and highlight any folder in Application Views.
2. Click the green Add button and select Add New Project.
3. Select the project. It is added to the Projects folder.

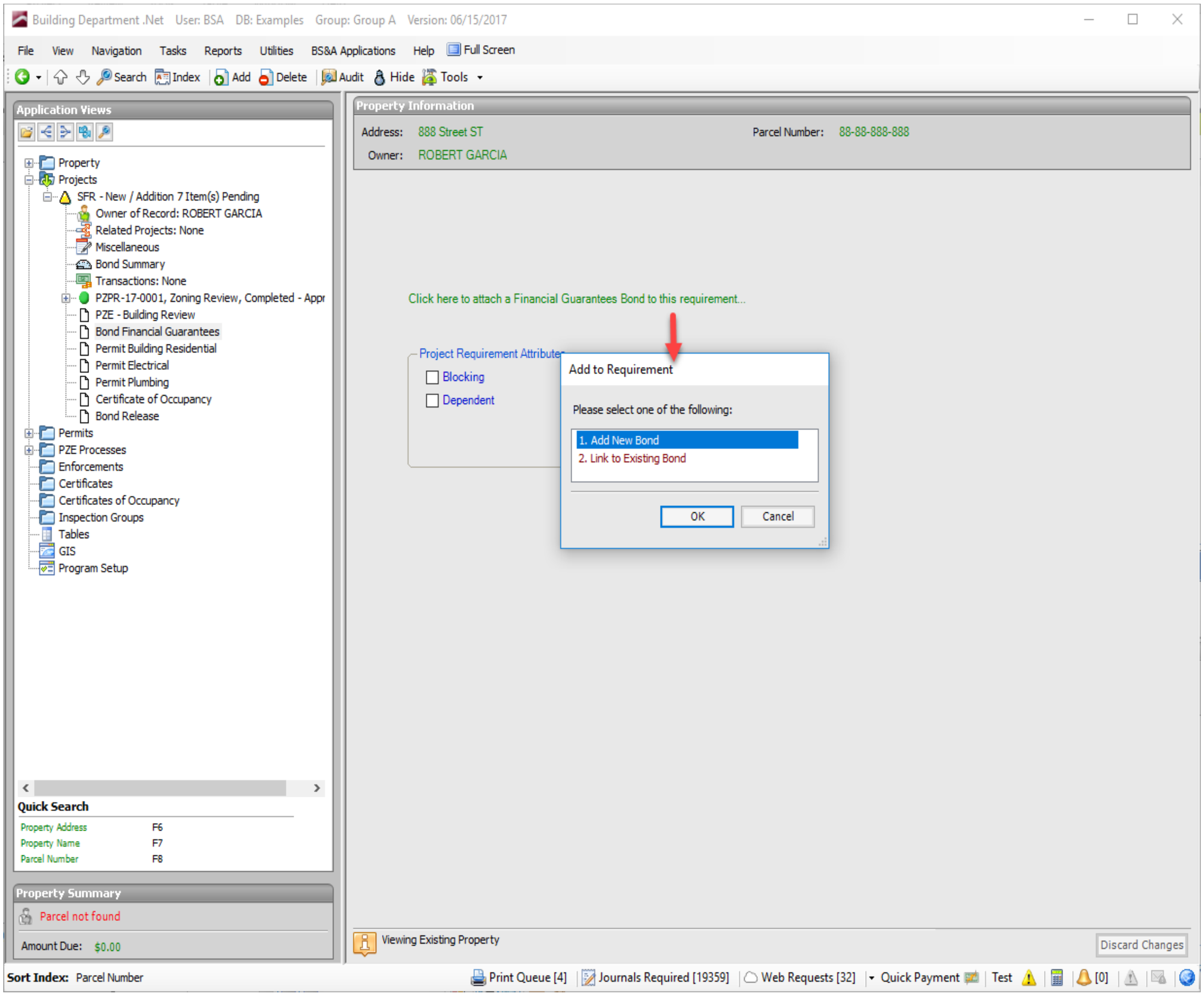
Remove a Requirement

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



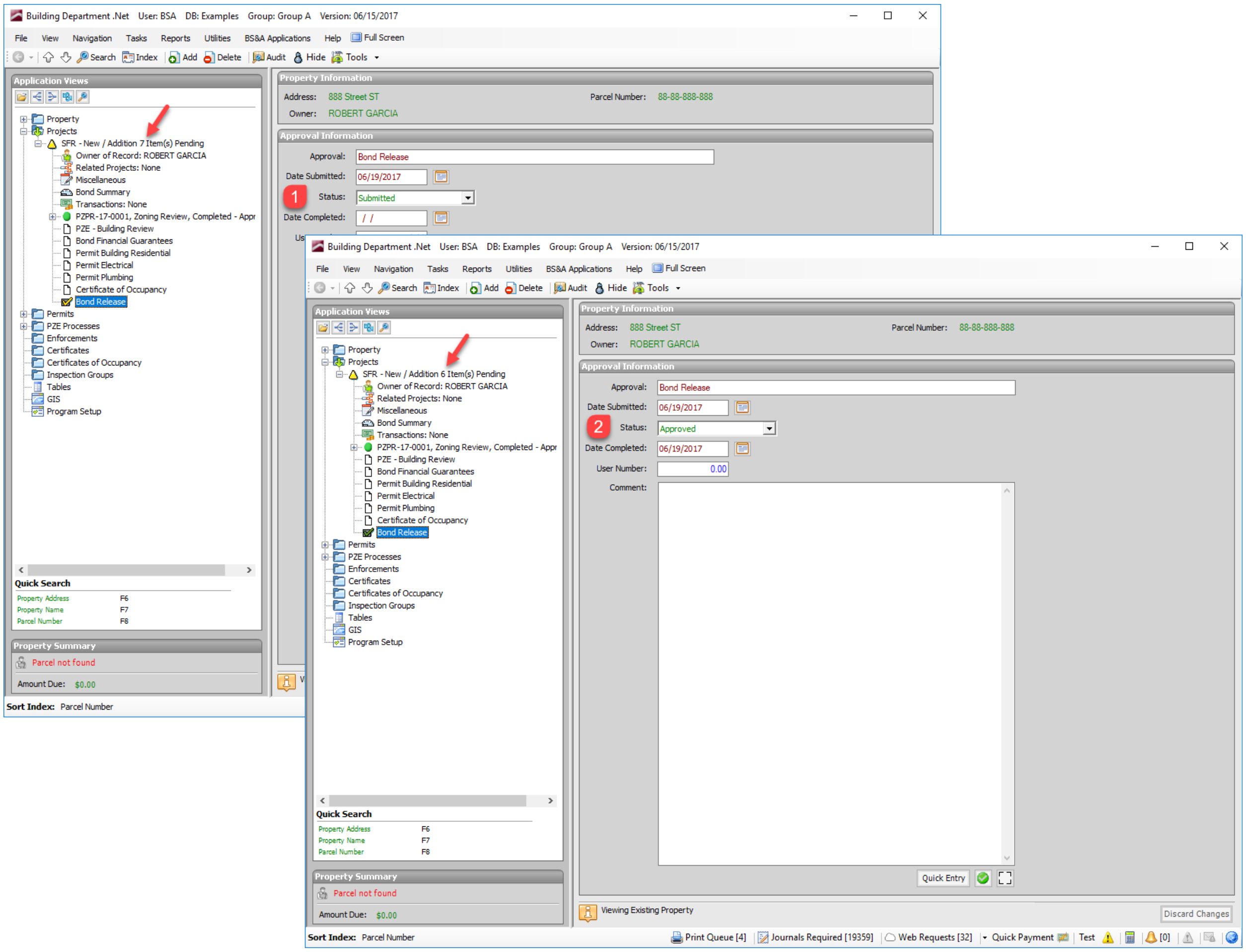
Start/Fulfill a Requirement

Requirements will go through their own steps before they will be considered fulfilled (approval, transactions, issuance, etc.). As requirements are fulfilled, the Items Pending count in the tree is reduced. All requirement types, with the exception of User Defined, provide a Click Here to Attach command link (bond is pictured).[1] When you click this command link, you are prompted to add a new record or link to an existing one. If you choose the latter, you are prompted to search for the record.



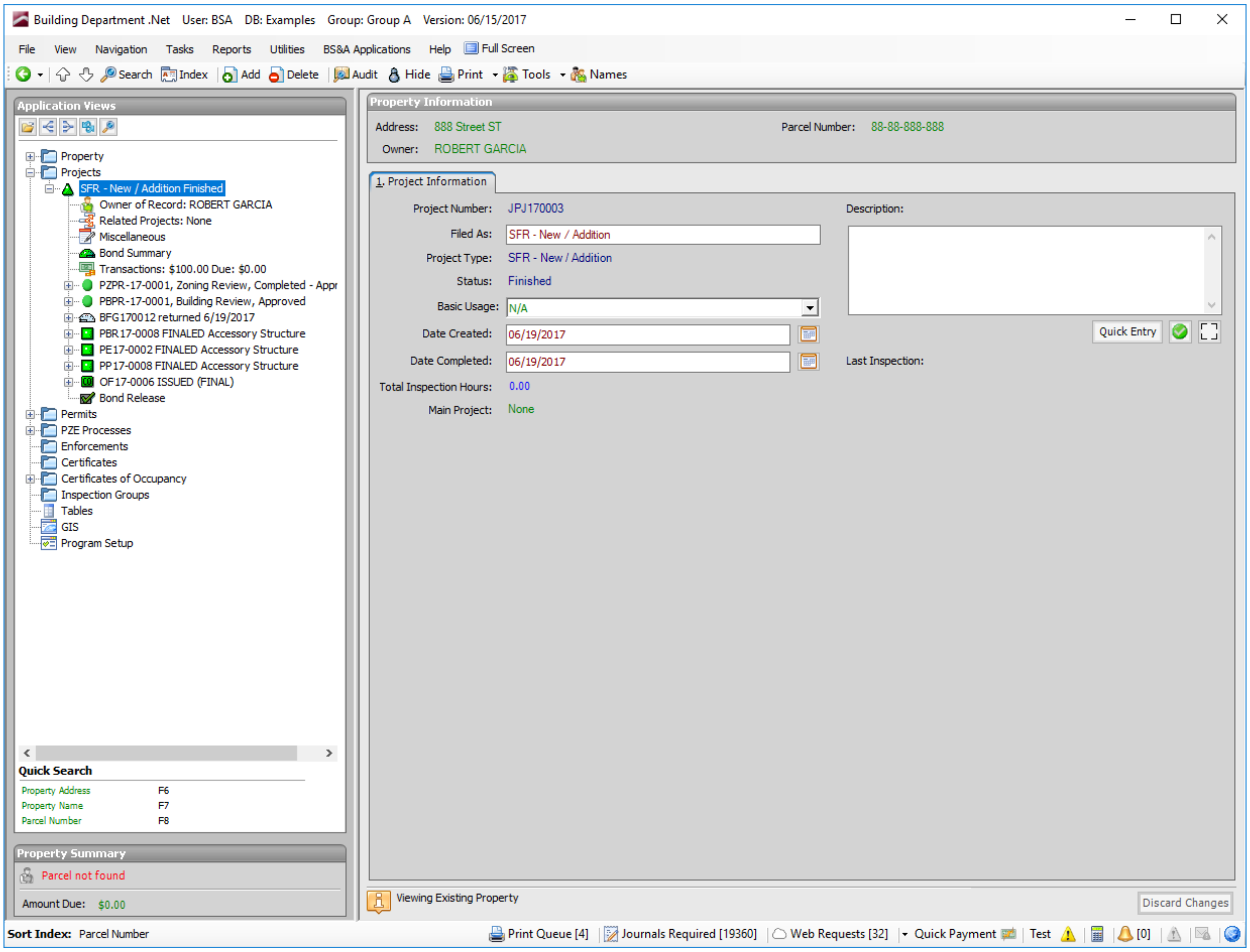
[1]You may also use the Add button in the Project Tool Bar.

A User Defined requirement uses simple date tracking. When you enter the Date Submitted, the requirement is considered "started" (1). When you enter the Date Completed, the requirement is considered fulfilled (2).



Complete a Project

Generally, the program will take care of this for you as you progress through the project. In the example pictured, the permits have been finaled and the bond money has been returned. The project is considered finished. Completed projects may be hidden from Property View.



Reporting

Building Department includes some system reports to aid in the tracking of currently-opened projects. Two of these are listed below; both are accessed by clicking the Reports menu and selecting Project as the category.

- Project User Approvals: Shows you the project's status and detail for each user-defined approval.
- Project Financial Summary: Provides a snapshot of the projects in your database, including permit fees owed and a total due for each project.