

BS&A Online: AutoFTP Client

Questions? Call us at (855) 272-7638 and ask for the I.T. Team, or email itsupport@bsasoftware.com.

Every year, new databases are created in the Assessing and Tax applications. When using BS&A Online, it is imperative that the correct – newest – database is the source of information. If not, you may be displaying incorrect values.

These instructions use the Assessing and Tax applications as examples, because they are the most-frequently displayed. The basic procedures apply to all BS&A data that you will be displaying.

Important Assessing Note – Write Floating Values

Once you've completed your roll over, it is recommended that you run the Write Floating Values utility to ensure that the correct information will be displayed on BS&A Online before you configure the BS&A Auto FTP Client.

1. Open Assessing .NET.
2. **Make sure you're in the correct database.**
3. Go to Application Views>Tables>Parcels.
4. Click the Tools button and select Write Floating Values.
5. Select All Records as the Population and click Run.

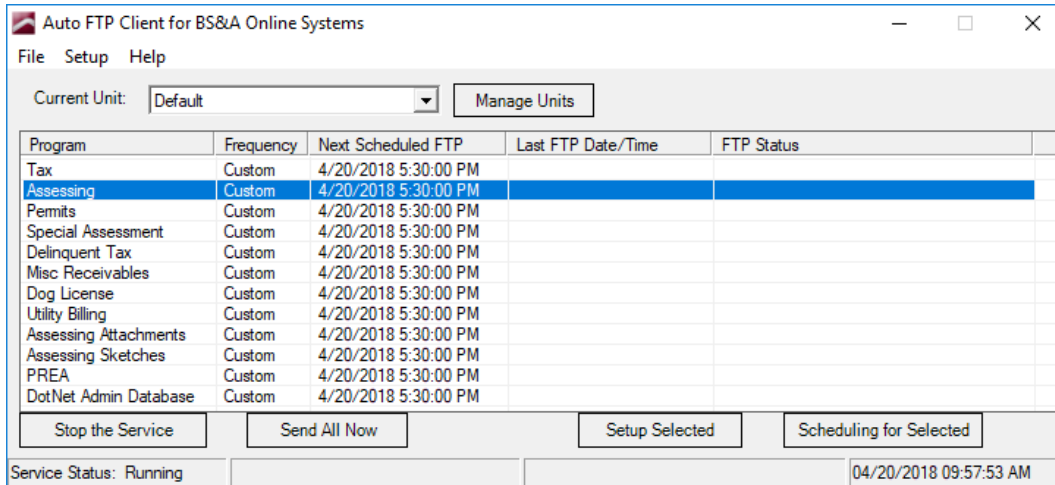
Important Tax Note – If You Upload Tax Data

The Tax application reads all previous year taxes from the history file. To ensure that the correct information will be displayed on BS&A Online, it is recommended that you update the history file before you configure the BS&A Auto FTP Client.

1. Open Tax .NET.
2. **Make sure you're in the correct database.**
3. Click Utilities and select History File Options>Update History Files with Current Tax Info.
4. Click Yes to continue.
5. Select All Records as the Population and click Ok.

Configuring the BS&A Auto FTP Client

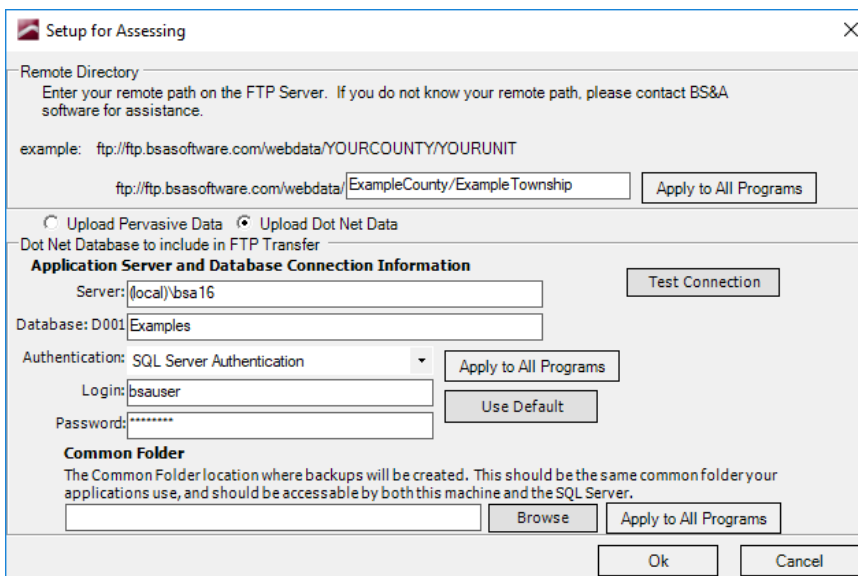
1. Locate and open the BS&A Auto FTP Client. This is typically located...
 - a. On the data server (most installs), or
 - b. On someone's workstation
2. Once opened, the following window should be displayed:



3. Click Assessing.
4. Click the Setup Selected button.
5. DO NOT MODIFY THE UPPER PORTION OF THE SCREEN (the upload path will remain the same for whichever database is sent to BS&A).
6. Make sure the Upload Dot Net Data radio button is selected. Be sure the database name is displaying properly. As an example (years are only included in Assessing and Tax database names)...

"old" database name: Example Township 2018

"new" database name: Example Township 2019



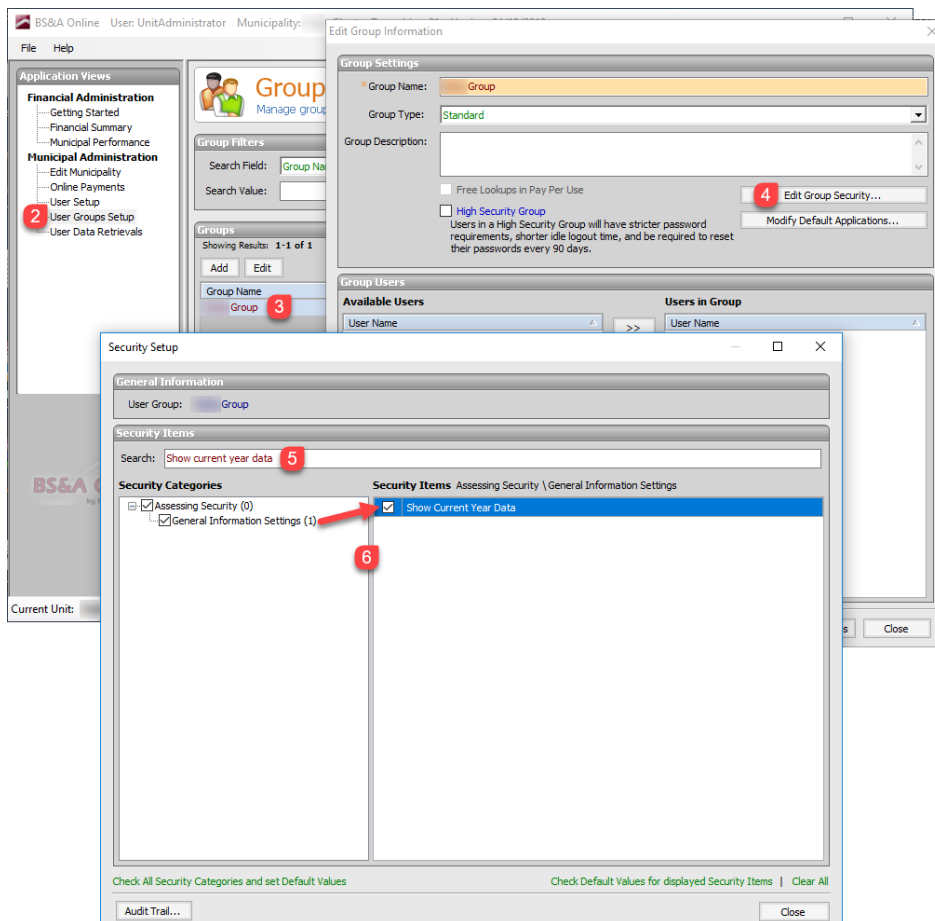
7. Click the Test Connection button. If you see green text that says "Connection Test Successful," proceed. If not, confirm the database name is correct and and run the test again.
8. Click the Ok button to return to the initial screen.
9. Set up the remaining applications (that you display). Refer to the directions above for assistance.
10. Close the Auto FTP.
11. Review the Assessing Notes section on the last page of this document.

Assessing Notes

After rolling over and switching to the new year's database (imperative for updates to name/address changes and current sale information), you must shut off the Show Current Year setting. This should not be flipped back on until values have been finalized, typically in March; BS&A will send a reminder about this.

We can change the setting for you, or you may do it yourself:

1. Login to the BS&A Online Admin Application with your administrative user name and password.
2. Click User Groups Setup under the Municipal Administration heading.
3. Double-click the security group.
4. Click the Edit Group Security button.
5. In the search box, type *Show current year data*.
6. Click General Information Settings, then check the Show Current Year Data box.



7. Click Close, then Close again. Repeat for any additional groups.