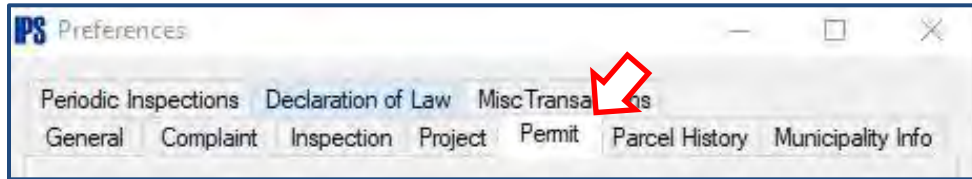# BAS Monthly Tip Sheet
☑ *Permit Safeguards*

New safeguard options have been implemented to prevent the issuance of an application or the completion of a permit record unless all fees are paid, all inspections are passed, and/or all approvals have been approved.
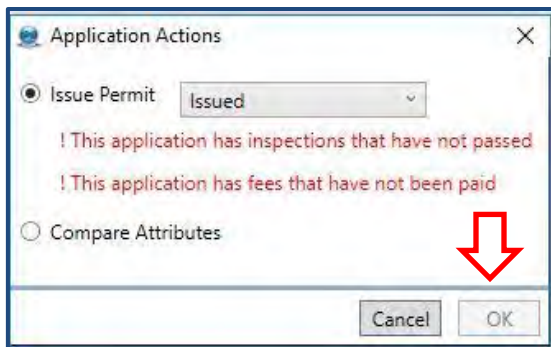

Under the File menu, click **System Preferences**.

These switches are located in the Permit tab.

Check the boxes to enable any safeguards which you desire.

Prevent Permit Issuance allows you to the stop the issuance of a permit.

Prevent Permit Completion allows you to the stop the completion of an issued permit.

The Action button will not allow the user to proceed until all conditions are met. The items which need to be addressed will display in **red**.

Once all conditions are met, the OK button will become live and the user can continue forward.

Note: These safeguards can be easily turned off if you decide you no longer wish to have them active. Simply go back into the System Preferences and uncheck those you wish to disable.

If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to answer your questions.
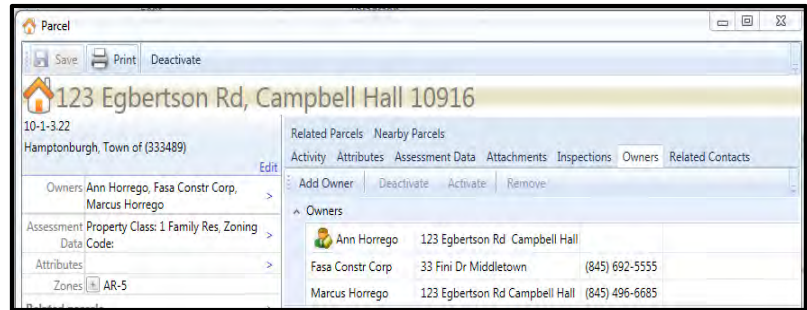
October 2018

BAS Monthly Tip Sheet
☑ *Adding new Owners to Parcels*

The OWNERS tab allows users to add and/or deactivate owners on a parcel.

This feature is located on the Parcel window. Search for and open the intended parcel, then click on the **OWNERS** tab.

New owners may be added through the Assessment Sync tool or manually.

To add a new owner manually:

- Click **ADD OWNER**. The address book window will appear. Users can search for an existing contact or add a new one.

- Click **CLOSE** on the address book.

- Click **SAVE** in the Parcel Window to commit the transaction. The new owner will appear in the list.
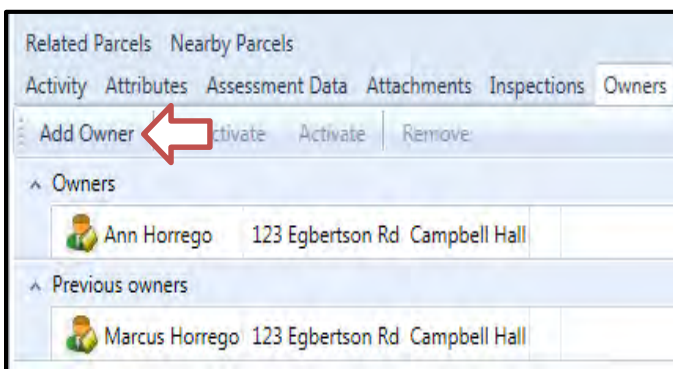
> *Note: To maintain ownership history on a parcel, it is highly recommended that the user not remove, but deactivate previous owners. The only time the REMOVE button should be used is when an owner was entered in error.*

To deactivate an owner:

- Highlight the individual you wish to deactivate. Click **DEACTIVE**.

- Click **SAVE** to commit the transaction.

- The deactivated owner will now move down to "Previous owners" section.
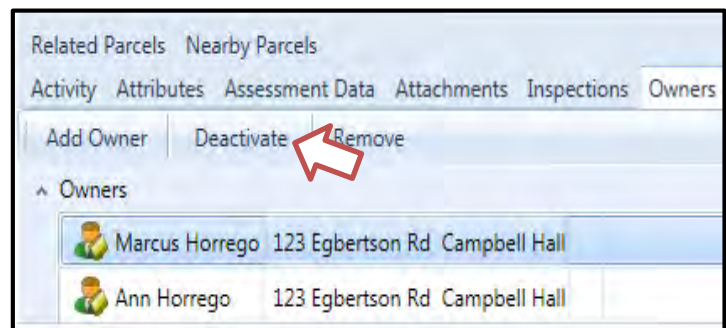
IPS Tip: By clicking this icon, the contact can be added from assessment into the Address Book or synchronized with an existing contact.

If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to answer your questions.

March 2015

BAS Monthly Tip Sheet
☑ Editing Collections

The Edit Collections feature allows the user to filter certain record data directly at print time. This makes it easy to quickly tailor a form to your needs without having to create an entirely new version for each circumstance that arises.

Some common uses for this feature include filtering out already remedied violations from a violation notice or choosing a specific record contact for a form that might vary each time (Business Contact, Owner, Tenant, etc.).

```
Tenant:
Brett Smith
8 McCord Ave.
Campbell Hall, NY 10916

Owner:
Jason VanNess
13 Mountain View Dr
Campbell Hall, NY 10916


Violation #: 00139
Dated: 03/19/2015
Re:Shed constructed without a valid Building Permit
Violation #: 00143
Dated: 04/24/2015
Re:Shed constructed without a valid Building Permit


Dear Brett Smith:
Dear Jason VanNess:
```

EDIT COLLECTIONS is located at the top-left of the print preview screen, which is shown after selecting your desired form.

Clicking the **EDIT COLLECTIONS** button will display a list of data on the record which is available for filtering (e.g. contacts, inspections, violations, and actions).

To choose the data you would like displayed, simply use the checkboxes to toggle certain items on and off.

After a change is made, a few seconds will elapse and the form will refresh to reflect the newly filtered data.

*NOTE: If you are on a version earlier than 3.97, you will not have the **Check All** or **Uncheck All** enhancement. You will need to manually check and uncheck the items you wish to display.*

If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to answer your questions.

May 2015

BAS Monthly Tip Sheet
☑ *Address Book: Insurance/Adding Attachments*

Worker's Compensation, Liability, and Disability insurance can be tracked within the IPS program alerting Users when policies have expired.

Within the SEARCH tab, choose ADDRESS BOOK and search for the desired Contractor. When the CONTRACTORS box is checked the INSURANCE tab becomes active.

Click on the INSURANCE tab and choose ADD. Fill in the desired information and SAVE.

NOTE: *When adding the Contractor to a record, the contact will show in red font when the policy has expired.*

Attachments, such as, Certificates of Insurance can be added to Contacts within the Address Book. Click on ATTACHMENTS followed by NEW ATTACHMENT and locate the desired document within your files.

If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to answer your questions.

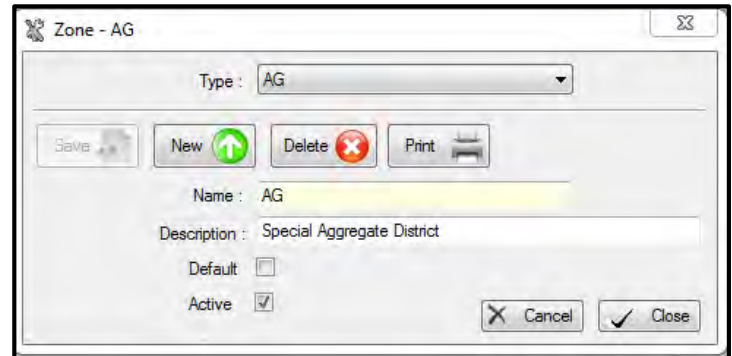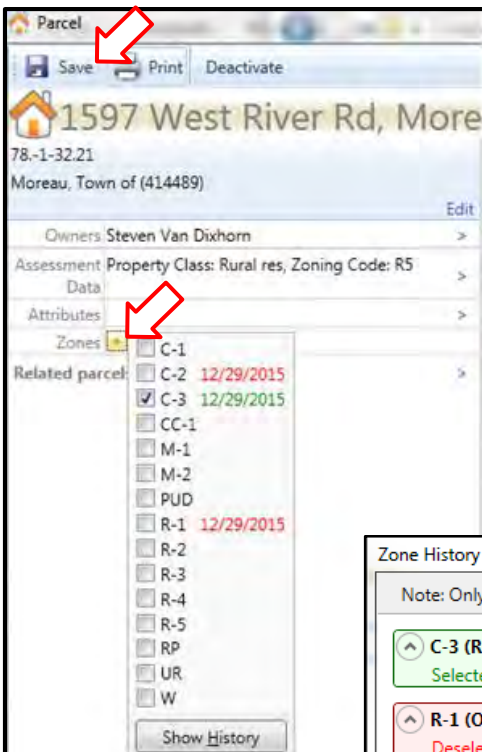August 2015

BAS Monthly Tip Sheet
☑ *Zone Types*

Zones can be tracked within the IPS program on the Parcel level. As zone changes are made, the history is automatically tracked.

To add a new Zone type, Go to MAINTAIN > ZONE TYPES and click on NEW.

- **Name**- The display name of the zone type.
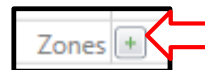- **Description**- Description of the zone (optional).

Click SAVE.

If a zone type is no longer desired, select the Zone Type from the dropdown list, uncheck the Active box, then click SAVE.

Once the Zone types have been configured, users have the ability to track the Zones within the parcel window.
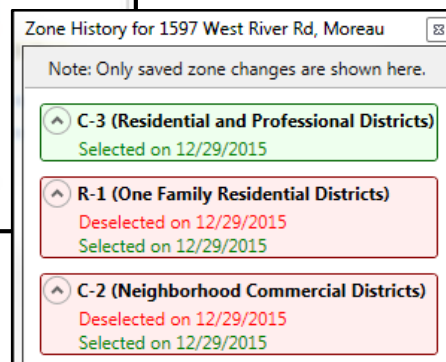
Go to SEARCH>PARCEL and type in the desired parcel.

From the Parcel window, locate the small green PLUS SIGN on the left side of the screen next to Zones.

Check the applicable zone(s) for the parcel.

Click SAVE on the parcel to save any changes.

The SHOW HISTORY button will show all saved changes that have been made to a parcel. Those displaying in red text indicate when a zone was "deselected" and green text for when a zone was "selected".

The zones bound in a green box represent the currently active zones.

Note: Zones have the ability to be printed on custom forms.

If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to answer your questions.

January 2016

BAS Monthly Tip Sheet
☑ *Report- Action by Action Type*

At the end of the year, you may be required to report activities performed by your office. The Action by Action Type report lists all selected Actions for Complaint records within a specified date range.

From the REPORTS menu, select COMPLAINTS/VIOLATIONS:

- **Report Type-** Select Action by Action Type

- **Action Types-** Choose Action Types to include on report

- **Sort By-** Choose from these options:
  - Action Date
  - Number
  - Complaint Type

- **Date Range-** Specify the reporting period

- **Include Voids** – Checking this box will include voided records

- **Show Complainants** – Show/remove complainant name

Note: This report is also located on the right side of the Complaints window or can be printed from a Complaint record.

Once you have determined all the criteria, click CREATE REPORT.

This report has the ability to be exported to a PDF document or an Excel spreadsheet by clicking on EXPORT within the Report Viewer screen.

Town of Highlands
Complaint Action By Type
Complaint Dates: 1/1/2014 - 3/25/2016
Shows Complainants

Action Types: Stop Work Order

Complaint #	Complaint Type	Action Date	Action Information	Complainant
Action Type: Stop Work Order				
14-0125	NYS Uniform Code VOH	05/20/14		Anonymous
14-0239	NYS Uniform Code VOH	11/17/14		Anonymous
15-0471	NYS Uniform Code VOH	07/07/15		Anonymous

Action Type: Stop Work Order   Total #: 3

Grand Total: 3

If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to answer your questions.
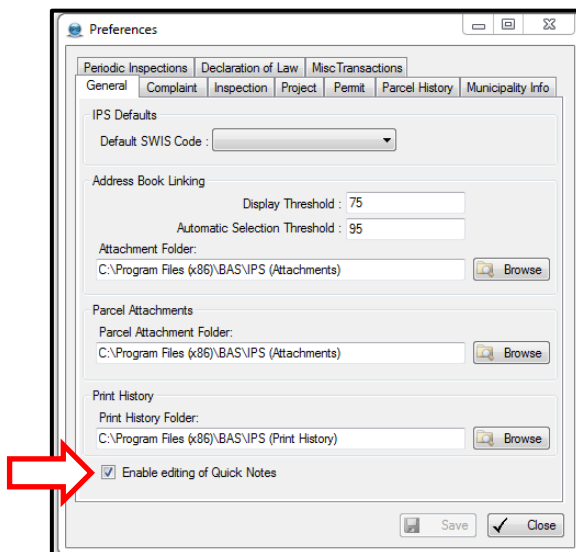

April 2016

BAS Monthly Tip Sheet
☑ Quick Notes

Quick Notes are a great way to save time when entering canned responses to Permit, Complaint and Project level inspections. They can also be utilized within the violation window for the Area Involved, Corrective Action, and Notes fields.

To enable Quick Notes go to FILE>SYSTEM PREFERENCES>GENERAL and check the box for "Enable editing of Quick Notes".

VIOLATION LEVEL QUICK NOTES

- Within the COMPLAINTS tab, search for the desired record.
- Add or open an existing violation.
- Click on the QUICK NOTES Button next to the AREA INVOLVED, CORRECTIVE ACTION, or NOTES fields.
- When the Quick Notes pop up appears, click ADD, type in the desired text, and click SAVE.
- Select the note and click INSERT to add the text to the chosen field.

INSPECTION LEVEL QUICK NOTES

- Search for the desired record.
- Click on the INSPECTIONS tab and open the relevant inspection.
- Click on the QUICK NOTES button
- When the Quick Notes pop up appears, click ADD, type in the desired text, and click SAVE.
- Select the note and click INSERT to add the text to the inspection.
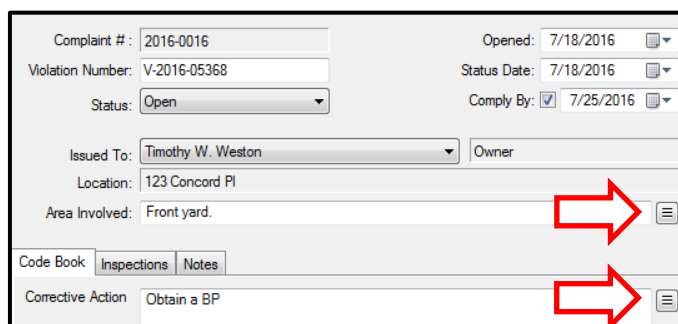
Note: Once a Quick Note is added, it will be saved for future use.

If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to answer your questions.
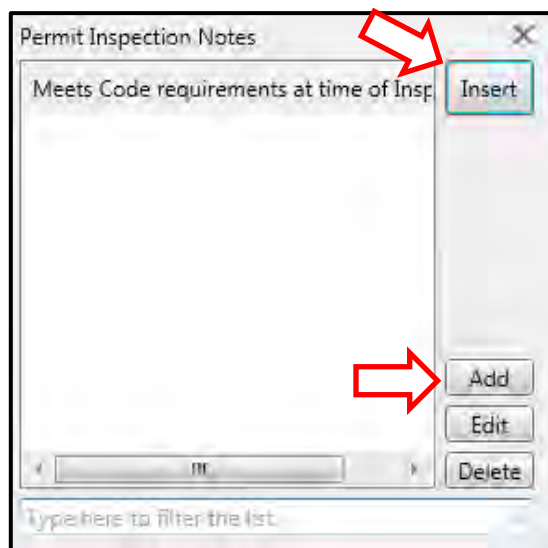
AUGUST 2016

BAS Monthly Tip Sheet
☑ *How to Add/Edit Attachments*

Adding attachments is a simple yet powerful feature of IPS. This tip sheet will detail how to add and edit those attachments while giving some examples of common usages.

When on a parcel, record (permit, complaint, etc.), inspection, or contact, attachments can be added via the ATTACHMENTS or IMAGES\DOCS tab. Simply click the ADD button and browse to the location of your file in the window that appears.

Once added, any attached items can be opened by double-clicking on them. Each file will open in the default program set for that type on your computer (.pdf in Adobe, .doc in Microsoft Word, etc.).

Attachments can be removed by selecting one and clicking the DELETE button. Deleted attachments can still be viewed and accessed if you check the 'Show Deleted Attachments' box.

Attachments can also be edited by selecting one and clicking the EDIT button. Editing an attachment allows you to change it's name, as well as add a description.

Below are some great uses for attachments:

Parcel – Title searches, surveys, photos of the front of property or driveway for difficult to identify parcels.
Record – Scanned-in copy of application, digital copies of any relevant plans, scans of any waivers pertinent to the proposed work, meeting minutes, audio/video recordings of board meetings.
Inspection – Photo/video of the area in violation, progress pictures of new construction.
Contact – Scans of contractor insurance/licensure information, identification cards.

If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to answer your questions.

November 2016

BAS Monthly Tip Sheet
☑ *Inspection Entry in IPS 4.0*

IPS 4.0 brings some new functionality to Inspections. Inspections added to the IPS program can be tracked on each record and later reported on to gauge productivity or tally results. Scheduled Inspections will show on the IPS Start Screen and on the Mobile App calendar.

Double-click on an inspection to open the Inspection Window.

Date: Click on the calendar drop down to assign a date to the Inspection. Checking the box will assign the current date.

Duration: A Duration can be set to help schedule inspections. The Calendar Screen of the Inspections module will show the durations, allowing you to see what is already scheduled and plan out other inspections.

Inspector: Choose the intended Inspector from the pre-defined list. Clicking on the calendar icon to the right of the dropdown will show you a calendar view of their other scheduled inspections for that day/week. Checking the Show All Inspectors box will allow you to choose from all inspectors, not just inspectors in the current Department.

Result: Choose the Result from the drop down (custom result types can be added).

Notes: Add any Inspection notes or comments. Quick Notes can also be utilized here (see August 2016 tip sheet).

Attachments: Add attachments such as photos, third party inspection certificates, etc. You can drag and drop the attachments in, and even edit their names/descriptions afterwards.

Reschedule: This button allows you to quickly create a new inspection while retaining the same Inspection Type and Inspector. All you need to do is assign the re-inspection date!

IPS can integrate with Outlook, which allows you to detect when an inspection conflicts with another calendar appointment (e.g. vacation day or doctor's visit) as well as push scheduled IPS inspections to your Outlook calendars. This helps prevent double-booking of appointments and provides better visibility into staff availability.

Updates are included in your yearly maintenance, so feel free to contact us and schedule your update.

If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to answer your questions.

December 2016

BAS Monthly Tip Sheet
☑ *Fee Type Maintenance*

IPS can be used to calculate fees based on criteria such as square feet, units, and cost.
To maintain fees, go to the menu located under Maintain > Fees and Payments > Fee Types.

Select the Fee Type that you would like to edit from the drop down menu at the top, or click the NEW button to create a Fee Type.

The Modules tab shows you which areas of the program the selected fee is available for (you must specify at least one).

The Details tab is where you can select the criteria on which the fees are based (custom criteria can be added by clicking Fee Based On), and specify a minimum amount if needed.

The Fee Scale tab is where you can configure more complicated fees, such as those based on different levels of square footage or cost.

The example to the left will calculate based on the square footage that you enter. The first 1000 will be $0.15/ft^2, the next 4000 (1001-5000) will be an additional $0.10/ft^2, and anything more than 5000 will be an additional $0.05/ft^2. This fee changes as the units (square footage) goes up.

The example to the right will calculate based on square footage in a series of fixed levels. Anything between 1-1000 will be $300, between 1001-5000 will be an additional $200 ($500), and anything more than 5000 will be an additional $100 ($600).

NOTE: If a fee is no longer needed, uncheck the ACTIVE box and click SAVE. This will deactivate the fee preventing future use, while keeping the fee history on existing records. Always deactivate fees if they are no longer in use, do not attempt to delete them.

If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to assist.
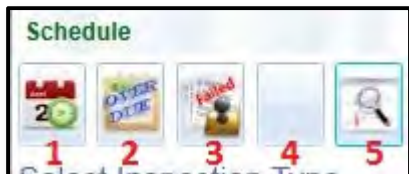
January 2017

BAS Monthly Tip Sheet
☑ *Scheduling Periodic Inspections in IPS 4.0*

The Schedule screen of IPS (located under the Inspections tab) is an area for searching, viewing, and scheduling Periodic Inspections. This screen can also be used to batch print upcoming inspection notices.

The Schedule screen has 5 different views for each inspection type:

1. Inspections Due – parcels coming due for re-inspection in a timeframe.
2. Overdue Inspections – parcels past due for re-inspection.
3. Last Failed Inspection – parcels that have failed a prior inspection.
4. Scheduled Inspections – parcels with scheduled inspections in a timeframe.
5. High Detail – all parcels requiring that type of inspection.

Parcels are included in a specific inspection category based on the presence of tags or attributes on that property. For review, our April 2014 Tip Sheet covers tagging parcels.

The columns in any of these views can be used to sort and filter the information. Clicking a column header will sort, and clicking the FUNNEL icon will display filtering options. You can even turn columns on or off by right clicking a column header.
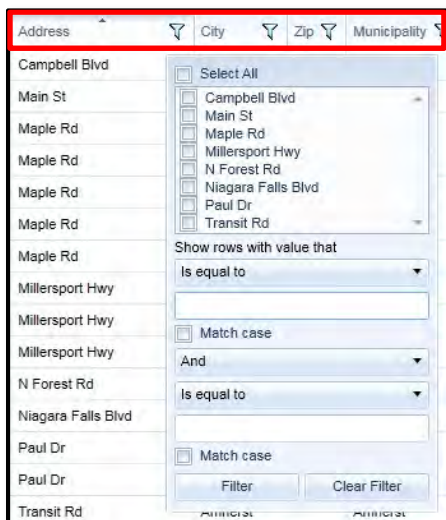
When you select a parcel in the list, an inspections view will appear on the right side of the screen. This will show you the previous Periodic Inspections of that type for that parcel. You can double click any of them to view their details, checklist, attachments, etc…

You can also schedule new inspections by clicking the SCHEDULE INSPECTION button near the top and entering basic information about the inspection.

That way, when using the views mentioned above, you will be able to see at a glance which inspections are coming up.

If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to answer your questions.

February 2017

BAS Monthly Tip Sheet
☑ *Approvals in IPS 4x*

The newest version of IPS (4x) includes the capability to track Approvals on records. If certain groups, boards, or departments are required to sign off on something, that can now be tracked in the program.

The Start Page of IPS now includes an area called OUSTANDING APPROVALS. This is an easy place for Members of Approval Groups to see records where their input is required. You can double-click to view the Approval, or right click to view the parent record.

Approval Groups are configured in the Maintenance area of the program under Approvals. You can create different Approval Groups, add Members to them, and create custom approval Statuses.

After setting up your Approval Groups, the next step is to specify where their input is required.

Default approvals can be configured in the Permits, Complaints, and Projects Type maintenance windows.

Once a record has been started, any defaults will copy down, and can then be managed from the Approvals tab.

In the example above, the Approval Groups of Building, Electrical, Plumbing, and Fire Safety are assigned to this record, meaning their input is needed. At a glance, the current status, user who conducted the review, any comments, and the last modifying user can be seen.

Additional Approvals can be assigned to records manually by clicking the **ADD** button.

An Approval can be edited by either double-clicking it, or selecting it and clicking the **EDIT** button.

An Approval can be deleted by selecting it and clicking the **DELETE** button. Any deleted approvals can be shown in the list by checking the 'Show Deleted Approvals' checkbox at the bottom-left of the tab.

March 2017

Upon opening an Approval, a member can edit the status, dates, and add comments.

Note: Users that are not a member of the group will have read-only access.

In the example above:

- Building Approval has been marked 'Approved' with a comment.
- Electrical Approval has been left 'Active' with a comment.
- Plumbing Approval has been marked 'Conditionally Approved'.
- Fire Safety Approval has been marked 'Denied' with a comment.

The status of 'Conditionally Approved' can be used to specify additional requirements within an Approval.

Conditions can be added and then marked as Met, Not Met, or Waived as their status progresses (or they become no longer necessary).

If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to answer your questions.

March 2017

BAS Monthly Tip Sheet
☑ *Projects Module Overview*

The Projects module in IPS is designed for tracking a user-defined list of Planning and Zoning records such as Variances, Rezoning, Special Use permits, Subdivisions, Site Plans, etc.

A Project record allows you to track information such as:

- Application and Expiration dates
- Status
- Attachments such as blueprints, letters, pictures, recordings, etc…
- Contacts
- Custom Attributes
- Use and Area Variances
- Fees and Payments
- Bonds and Escrows
- Approvals
- Inspections
- Related Permits

Custom Actions can be created to track anything that might happen during the life of a project. Some common examples include Notices, Meetings, Hearing Dates, and Planning/Zoning Board Actions.

Custom forms can be added to print from the Projects Module; examples include area notices, approval/denial letters, memos, and resolution letters.

Some of the functionality specific to the Projects module will be covered in more detail in upcoming Tip Sheets!

If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to answer your questions.

April 2017

BAS Monthly Tip Sheet
☑ *Project Bonds*

The Projects module in IPS can keep track of Bonds/Escrows that are used during the life of a project.

Bonds are handled on the Bond tab of a Project record.

To enter a Bond on a project, click the START NEW BOND button.

Information such as the type of Bond, Format, Balance, Expiration Date, Applicant, and Poster can be entered when creating a Bond.

After creating a Bond, you can track withdrawals and deposits in the Activity area. Simply enter the amount and a reason, and then click the + button to make a deposit or the – button to make a withdrawal. Activity will update the Current Balance of the bond accordingly.

A Bond can also be completely voided by entering any amount (usually the current balance) in the Activity area, giving a reason, and clicking the VOID button. Please note that this action is irreversible.

The Conditions area can be used to specify various conditions that have to be met regarding the bond or its withdrawals/deposits.

If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to assist.

June 2017

BAS Monthly Tip Sheet
☑ *Project Actions and Reports*

In IPS 4x, Process Tracking in Projects has been replaced with Actions. Just like in the Complaints module, custom user-defined Actions can be created to keep track of anything that might happen during the life of a Project. Additionally, Project Reports help you to gather and display information on your Projects in an orderly way.

*Project Actions are configured in Maintenance -> Project -> Action Types.*

Clicking the ADD button next to Actions on a Project will bring up a window with all the available Actions. You can also Edit and Delete existing Actions.

Examples include Hearing Dates, Reviews, Meetings, Notices Sent, and Notes.

Clicking an Action will bring up a new window for entering the information. Two new fields are available for Actions: Hearing Date and Approval Group.
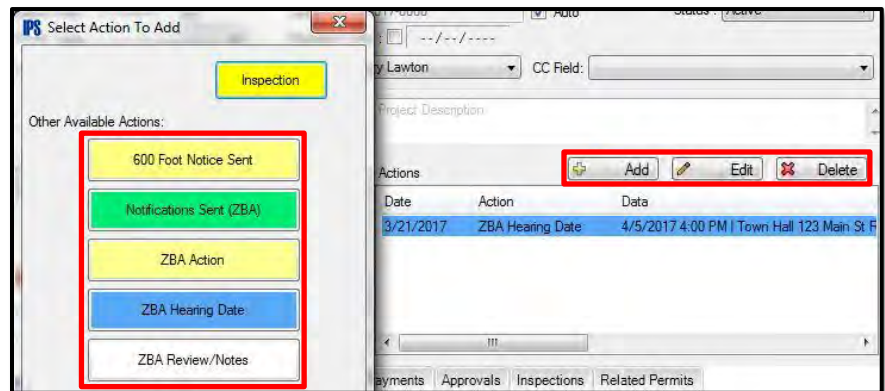
Project reports can be found in Reports -> Project.
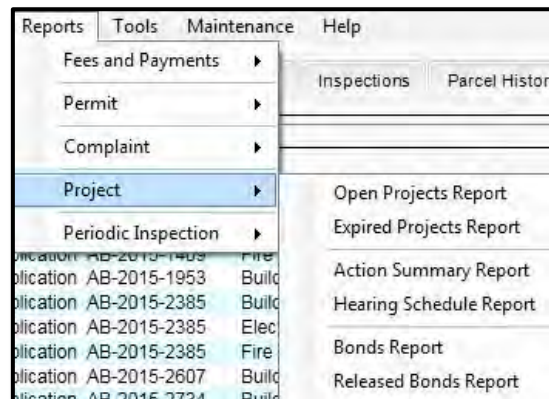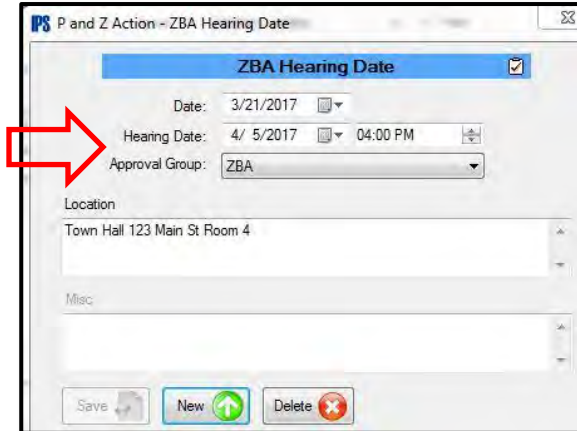
These reports include your Open or Expired Projects, Actions on your Projects, Actions that have Hearing Dates, and Open or Released Bonds. These reports can be run for a specific time frame, and for all or specific Project/Action/Bond Types. This ensures that you can get a report for exactly what you want to see.

The Hearing Schedule Report will generate a list of Actions with Hearing Dates for your different Approval Groups in a time range that you set. This is very useful for getting an agenda for upcoming hearings or meetings.

If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to answer your questions.

July 2017

BAS Monthly Tip Sheet
☑ *Start Page in IPS 4.4.7*

The Start Page is a great place to see your own workload, that of another inspector, as well as keep track of scheduled inspections for everyone.

The *Show All Inspections* area allows you to keep track of all SCHEDULED inspections. You can view a specific inspector's schedule, or select ALL to see everyone. You can also set a specific date range you'd like to view. Checking the *Failed Inspections Only* box will filter to only failing inspections.

The *Show Scheduled Inspections* area will show you past due or upcoming SCHEDULED inspections that have no result recorded. You can view results for a specific inspector, or select ALL to see everyone. The Timeframe can be set to Today, This Week, or Next Week.

The *Show Assigned* area displays current, open records assigned to an inspector. You can also select ALL inspectors for a broader view of active items.

The Show Recent area displays the items that you have been working on recently.

The Outstanding Approvals area is covered in great detail in our March 2017 Tip Sheet.

If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to assist.

August 2017

BAS Monthly Tip Sheet
☑ NEW 4x Parcel History

The new and improved PARCEL HISTORY tab allows users to see all activity on a parcel and its sub-parcels. It is an invaluable tool for viewing/opening any transactions on a parcel, as well as a great place to initiate new records.

From the PARCEL HISTORY tab, start by searching for a parcel. Select the intended parcel to see the history below.

Results can be filtered down by checking or unchecking the boxes for Open or Closed Items; Applications, Permits, Complaints, Inspections; etc. Users also have the ability to filter the results to a specific date range. Be sure to click the refresh button to see the most up to date results. Any of the activity in the list can be opened with a double-click.
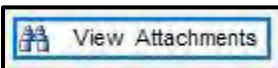
Select a record in the list and click the new VIEW ATTACHMENTS button for a shortcut to see that item's attachments.
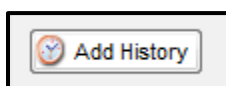
The ADD HISTORY button allows users to add simple historical transactions and details to the record, without the need of creating an entire permit, complaint, etc.

If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to answer your questions.

September 2017

BAS Monthly Tip Sheet
☑ *Adding New Permit Types in IPS 4.x*

New permit types can be added, and their available Fees, Forms, Inspections, etc. can be configured within the Permit Type Maintenance area of the program.

To add a new permit type, go to MAINTENANCE -> PERMIT -> PERMIT TYPES and click on NEW. The following fields are available:

- **Name** - The display name of the permit type.
- **Full Name** -The full (long) name of the permit type *(optional)*.
- **Expires in** - The default expiration period for this permit type.
- **Renewable** - Flags this type as renewable *(with optional fee)*
- **New Home Construction**- Flags the permit type to show on the F.W.Dodge report *(optional)*.

Click SAVE to activate the tabs on the lower portion of the screen, which allow you to set which Fees, Inspections, Forms, User Defined Attributes, and Approvals are available for that permit type, and optionally which are added by default to new records.

Fees: Moving a fee from the left column to the right column with the arrow button makes it available for the permit type, and checking the box will make it a default fee.

Default Inspections: To default application level inspections, click the pink button and move the desired inspection type from the left column to the right column with the arrow button. To default permit level inspections (i.e. upon permit issuance), click the green button and do the same.

Forms: Moving a form from the left column to the right column with the arrow button will make it available.

User Defined Attributes: Place a check mark next to a user defined attribute on the left to make it a default. An optional default value can also be specified, if desired.

Approvals: Moving an approval group from the left column to the right column with the arrow button makes it available, and checking the box will make it default.

NEW TO 4X is the necessity to add a new permit type to a department in MAINTENANCE -> GENERAL -> DEPARTMENTS. Select the department from the top dropdown menu, click on the Record Types tab, click the Permit radio button, and use the arrow button to move the new permit type from the left column to the right column to make it available.

When adding new Permit Types; remember to also add the type to a Permit Group. Permit Groups are where the number sequence a permit receives is defined. Permit Groups can be found within MAINTENANCE -> PERMIT -> PERMIT GROUPS.

If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to answer your questions.

October 2017

BAS Monthly Tip Sheet
☑ *How to "Generate Areas" or Create Sub Parcels in 4x*

The Generate Areas feature can be helpful for those parcels that share the same tax map number but need to be broken out separately (e.g. mini malls, multi dwelling units or mobile home communities). Generating these areas separately allows for inspections, permits or complaints to be assigned to sub-parcels individually.

You can find this feature on the RELATED PARCELS tab on any parcel window.
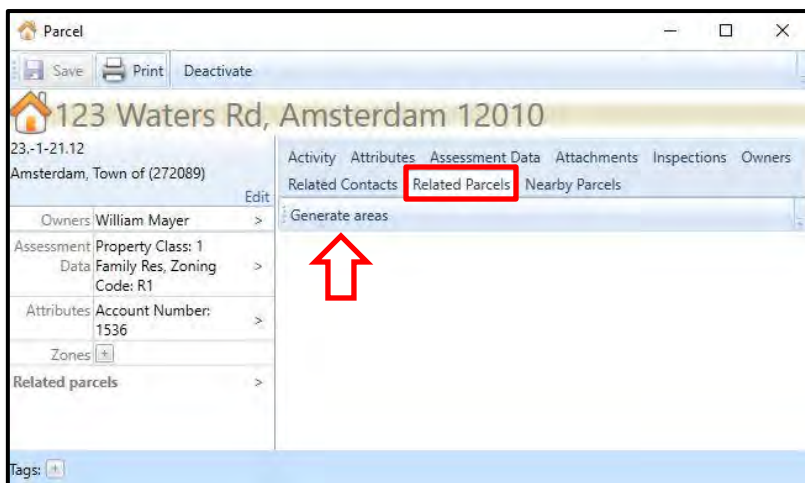
Click GENERATE AREAS and enter the number of areas that are needed. If a prefix is necessary (unit, apt, suite), one can be added at this time. You will have the opportunity to change this information for each individual area after the sub-parcels are generated.

To generate your areas, click the OK button and then SAVE when you are done.

Upon clicking OK and SAVE, a new section will appear showing the sub-parcels. By clicking the BLACK TRIANGLE, the new areas will be listed below. They can now be named and/or given their own address. To do so, double click on the first new parcel and choose EDIT in the resulting window. As you can see you can now change the basic parcel information, TAGS can be entered at this time as well. Press the OK and SAVE buttons to complete this new sub-parcel and repeat the process for each new area.
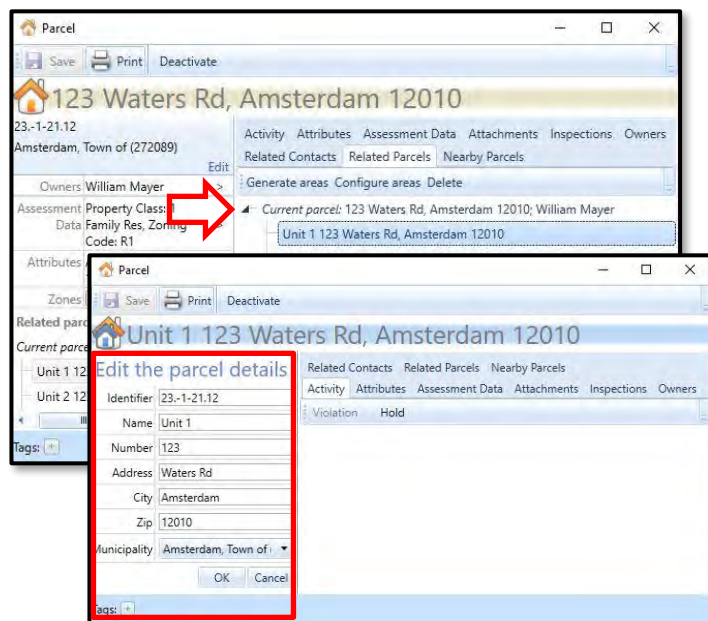
If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to answer your questions.

November 2017

BAS Monthly Tip Sheet
☑ *Adding New Complaint Types in 4x*

New complaint types can be added within the Complaint Type maintenance window. Forms, User Defined Attributes, Actions, and Approvals can also be configured here.

To add a new complaint type, Go to MAINTENANCE -> COMPLAINTS -> COMPLAINT TYPES and click on NEW. The following fields are available:

- **Complaint Type Name**- The display name of the complaint type
- **Description**- Description of the complaint type (optional)

Click SAVE to activate the tabs on the lower portion of the screen. These tabs allow you to set which Forms, User Defined Attributes, User Defined Actions, and Approvals are available for the selected complaint type. Defaults can be set so that they are automatically added to new records upon creation.

Forms: Select the desired forms from the left side and use the arrow buttons to move them to the right side.

User Defined Attributes: To add UDAs, place a check in the box for the desired defaults.

Action Types: Select the desired actions from the left side and use the arrow buttons to move them to the right sight. Place a check in the box for the desired defaults.

Approvals: Select the desired approvals from the left side and use the arrow buttons to move them to the right sight. Place a check in the box for the desired defaults.

NEW to 4x- DEPARTMENTS

It is now necessary to add a new complaint type to a department. Departments can be found within MAINTENANCE -> GENERAL -> DEPARTMENTS. Select the department from the top drop-down menu and click on the Record Types tab. Click the Complaint radio button, and use the arrow button to move the new complaint type from the left column to the right column to make it available.

When adding new Complaint Types; remember to also add the type to a Complaint Group. Complaint Groups are where the number sequence resides in the IPS Program. Complaint Groups can be found within MAINTENANCE -> COMPLAINTS -> COMPLAINT GROUPS.

If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to answer your questions.

December 2017

New types of Planning or Zoning records can be added within the Project Type maintenance window.

To add a new Project Type, Go to MAINTENANCE -> PROJECTS -> PROJECT TYPES and click on NEW. The following fields are available:

- **Name**- The display name of the project type
- **Description**- Description of the project type (optional)

Click SAVE to activate the tabs on the lower portion of the screen. These tabs allow you to set which Forms, Default Fees, User Defined Attributes, Action Types, and Approvals are available for the selected project type. Defaults can be set so that they are automatically added to new records upon creation.

Approvals: Select the desired approvals from the left side and use the arrow buttons to move them to the right side. Place a check in the box for approvals that should be added to the record automatically on creation.

Action Types: Select the desired actions from the left side and use the arrow buttons to move them to the right side.

Forms: Select the desired forms from the left side and use the arrow buttons to move them to the right side.

Default Fees: Place a check in the box for the desired defaults.

User Defined Attributes: To add UDAs, place a check in the box for the desired defaults.

NEW to 4x - DEPARTMENTS

It is now necessary to add a new project type to a department. Departments can be found within MAINTENANCE -> GENERAL -> DEPARTMENTS. Select the department from the top drop-down menu and click on the Record Types tab. Click the Project radio button, and use the arrow button to move the new project type from the left column to the right column to make it available.

When adding new Project Types; remember to also add the type to a Project Group. Project Groups are where the number sequences reside in the IPS Program. Project Groups can be found within MAINTENANCE -> PROJECTS -> PROJECT GROUPS.

If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to answer your questions.

January 2018

BAS Monthly Tip Sheet
☑ *Batch Printing Ability in Searches in 4x*

IPS allows users to quickly address the issue of expired permits which require attention.

To mass generate Expired Permit Letters you will perform a Permit Search. You will search OPEN permits due to expire in a specific date range. Hit SEARCH to display records.

Click the Print icon and a list of your available forms will display. Select the form you wish to generate.

If you do not have an Expired Permit Letter, please contact us and we will be happy to provide you with some samples.
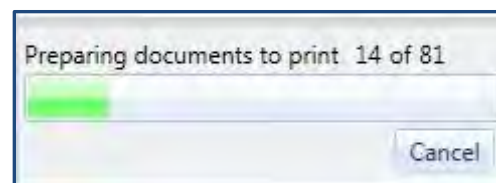
Documents will be prepared and sent to a print preview for viewing.

It is a good idea to proofread the preview for errors prior to sending documents to your printer.

Reminder: When printing letters or envelopes, always check to make sure the addresses are complete!

If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to answer your assist..

April 2018

Users can easily track the issuance of a Stop Work Order in the Complaint module via the Actions feature. When documented properly, users have the ability to report on the number of stop work orders issued in a reporting year.

To add a new action type, Go to MAINTENANCE -> COMPLAINTS -> ACTION TYPES and click on NEW.

Enter "Stop Work Order Issued", check Complaint and Click SAVE.   In this example, the color code has been customized to display in Red.

Actions may be defined to track a variety of information through the Design Action Screen tab.

For a Stop Work Order, you may want to track the following:

- **Contact-** the party the Stop Work Order was issued to
- **Inspector-** the party that issued the Stop Work

Further options for customization include what action information to display on the main record, and what data fields are required for a specific action to be added.

User-Defined Actions must be added to the Complaint types.   To make your actions available, Go to MAINTENANCE -> COMPLAINTS -> ACTION TYPES.

Select Complaint Type from the pull-down.   Click the Action Type tab. Highlight and move all actions you wish to have available to the left side of the screen. You will need to do this process for all complaint types which you want this action available for.

If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to answer your questions.

May 2018

BAS Monthly Tip Sheet
## ☑ *Reporting Stop Work Orders in 4x*

The Action by Action Type report in the Complaints module gives users the ability to report on the number of Stop Work Orders issued in a specified date range.

From the REPORTS menu, go to COMPLAINT -> ACTION BY ACTION TYPE.

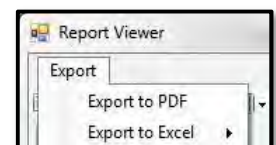Select the ACTION TYPES you wish to report, in this scenario you would select "Stop Work Order".
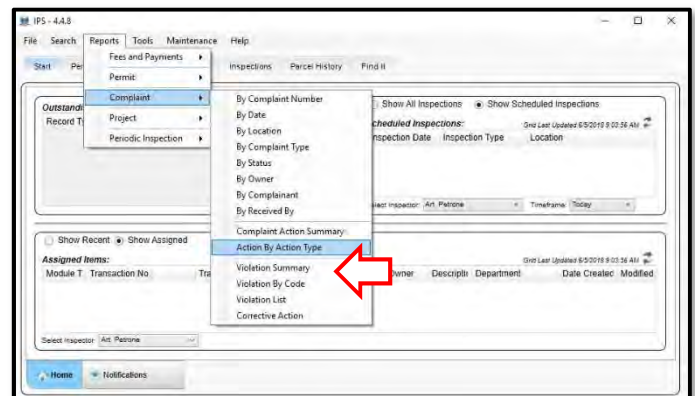
Select from the following to customize your report:
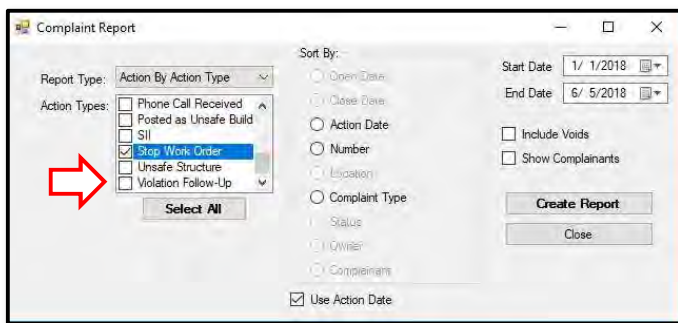
- **Sort By-** Choose from these options:
    - Action Date
    - Number
    - Complaint Type

- **Date Range-** Specify the reporting period

- **Include Voids** – Checking this box will include voided records

- **Show Complainants** – Show/hide complainant name

Once you have determined all the criteria, click CREATE REPORT.

This report has the ability to be exported to a PDF document or an Excel spreadsheet by clicking on EXPORT within the Report Viewer screen.

If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to assist.
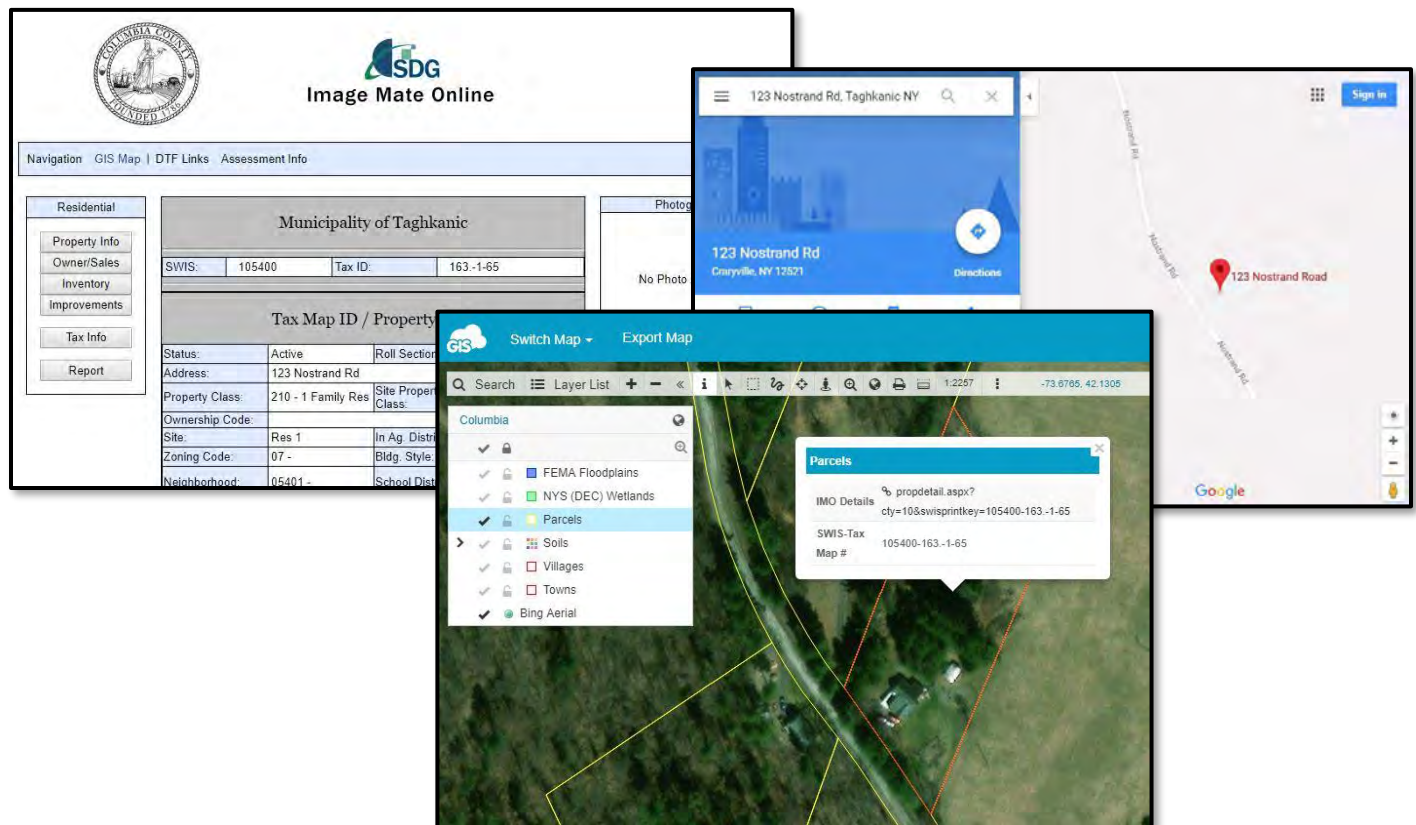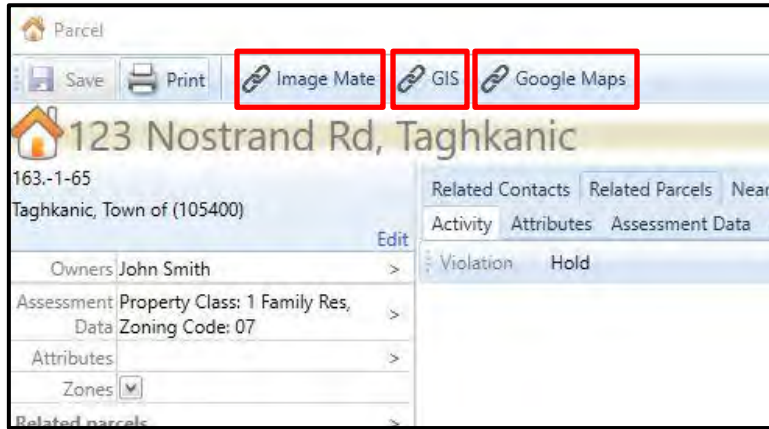
June 2018

BAS Monthly Tip Sheet
☑ *NEW Parcel Links in 4.4.8*

A new feature of IPS 4.4.8 is the ability to enable links on the Parcel window to sites such as Image Mate Online, GIS mapping, and Google Maps. These links will take you to those sites with information specific to that parcel.

Image Mate and GIS links work off specific parcel information, so valid Assessment Data for your parcels is necessary. Your municipality must have access to Image Mate and GIS services. Please contact us to configure these links for you.
Note: To enable this feature, you must be on IPS version 4.4.8 or higher.

If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to assist.
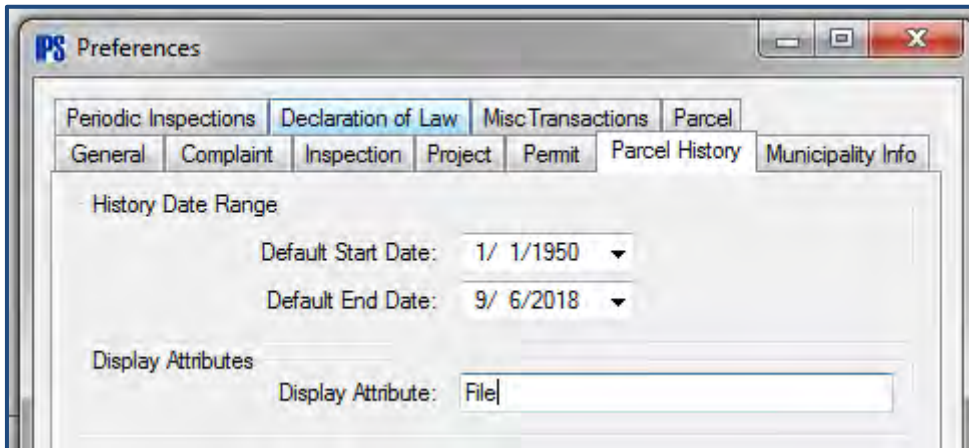
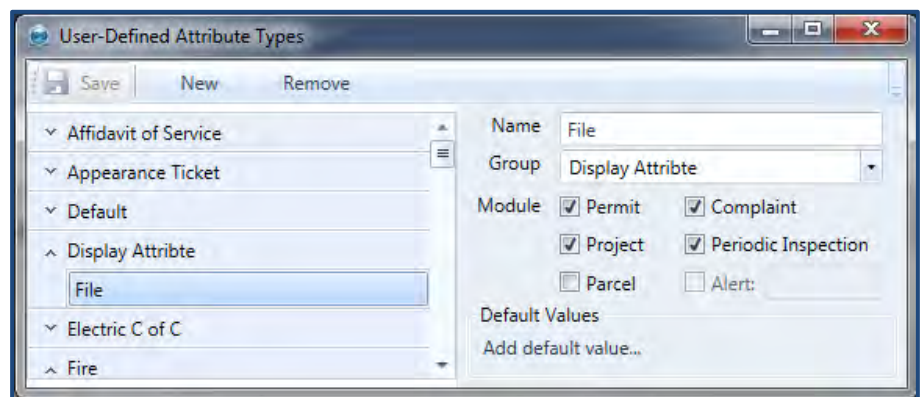## August 2018

BAS Monthly Tip Sheet
☑ *Using The Display Attribute For Parcel History*

Records in IPS can be visibly linked in Parcel History by using the Display Attribute set in System Preferences.

Start by going to the File menu and click System Preferences. In the Parcel History tab, enter the name of the attribute you plan to use.

In the Maintenance > General > User-Defined Attribute Types menu, create an attribute with that same name and check the boxes to make it available for the Permit, Complaint, Project, and Periodic Inspection Modules.

The Attribute Record column will display the value for that attribute on the record. In the example pictured, the "File" attribute was added to records with a value of "XYZ Subdivision." No matter what lot or record type, it is easy to tell what records are related to the creation of the subdivision.

If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to answer your questions.
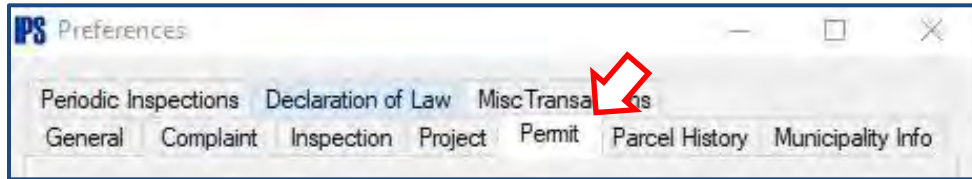
September 2018

BAS Monthly Tip Sheet
☑ *Permit Safeguards*

New safeguard options have been implemented to prevent the issuance of an application or the completion of a permit record unless all fees are paid, all inspections are passed, and/or all approvals have been approved.

Under the File menu, click **System Preferences**.

These switches are located in the Permit tab.

Check the boxes to enable any safeguards which you desire.

Prevent Permit Issuance allows you to the stop the issuance of a permit.

Prevent Permit Completion allows you to the stop the completion of an issued permit.

The Action button will not allow the user to proceed until all conditions are met. The items which need to be addressed will display in **red**.

Once all conditions are met, the OK button will become live and the user can continue forward.

Note: These safeguards can be easily turned off if you decide you no longer wish to have them active. Simply go back into the System Preferences and uncheck those you wish to disable.

If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to answer your questions.

October 2018

BAS Monthly Tip Sheet
☑ *Inspection Scheduling Tools*

IPS 4.x versions have a variety of ways to help with the scheduling of inspections and help you see who is where when.

From any inspection window you can select an inspector and an approximate date, then click the **calendar icon** on the right side of the **Inspector** dropdown box. This can be done from existing inspections or from new inspections you're creating.

The inspector's calendar for the target week will pop up in a new window. Hovering your mouse over any of the inspections will give more details like address, inspection type, and exact scheduled times.

Note: Multiple inspections can be scheduled for the same time period.
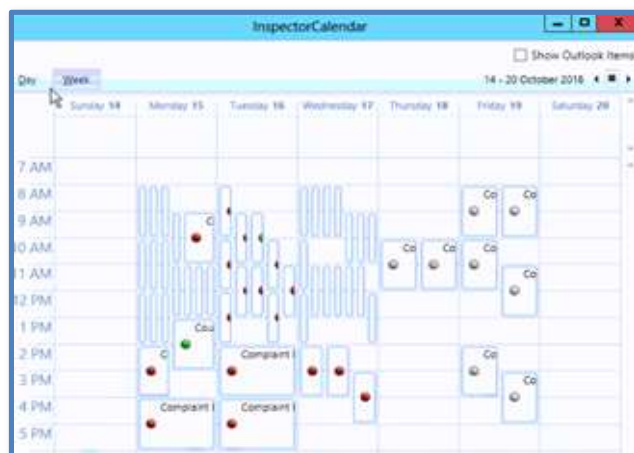
There is a calendar located in the Periodic Inspection module where you can select multiple inspectors and see all of their inspections for a **Day**, **Week**, or entire **Month** by clicking on their respective buttons.

If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to assist.

November 2018

BAS Monthly Tip Sheet
☑ *Create New Parcel in 4x*
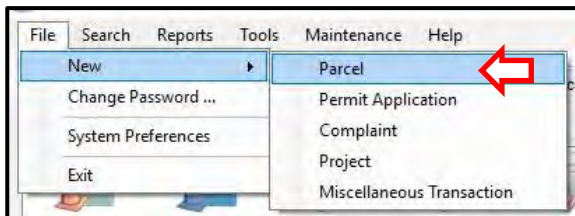
New parcels can be created in your IPS system when needed. To avoid duplicates, it is recommended to first check both your active and inactive parcels prior to creating a new parcel.

Under the File menu, click **NEW** and then **PARCEL.**

Note: New parcels can NO LONGER be created from an Application or the Parcel History window.

Fill in the desired information as follows:

- **Identifier:** Tax Map Number or SBL
- **Name (optional):** Name of Business or Unit #
- **Number:** Street Number only
- **Address:** Street Name only
- **City:** City
- **Zip:** Zip Code
- **Municipality:** Select Municipality from pull-down

* IMPORTANT*- The Name field is NOT where you enter the Owner's Name.

After all required items have been entered, click the **ADD OWNERS** button.

Click **ADD AN OWNER** and your address book will display.

It is recommended to search the address book before creating a new entry. The left portion of the screen allows you to do this. If the party does not exist, create the contact by filling in their information on right side. When finished, click **CLOSE**.

The owner information will display on the new parcel window. Click **CONFIRM**.

Confirm that the parcel details are correct. If any changes are needed, use the **BACK** button to do so. To finalize the creation of the new parcel, click **CREATE PARCEL**.

Once your New Parcel has been added, you will be able to use it to add new records such as permits, complaints, projects, or inspections.

If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to assist.

December 2018

BAS Monthly Tip Sheet
☑ *Valuation Field in IPS 4.x*

The Valuation portion of the Fees and Payments tab has been moved to an independent field. Valuations can now be added without necessitating a fee.

To add a valuation, choose the FEES and PAYMENTS tab, click into the VALUATION field, type in the desired amount, click SAVE VALUATION.

Note: if you forget to add the valuation during the payment process, or if it changes with the scope of the work, you no longer have to void payments to make adjustments.

Monthly Permit Valuation Summary
For the month of: January 2019

Permit Type	Census Code	Monthly Valuation	Count	Year to Date Valuation	Count
Com Interior Alteration		$1,798,130.00	9	$1,798,130.00	9
Com New Construction		$1,700,000.00	2	$1,700,000.00	2
Demolition (Com)		$15,000.00	1	$15,000.00	1
Elec Com Alteration		$49,590.00	10	$49,590.00	10
Elec Res Alteration		$51,725.00	25	$51,725.00	25
Elec Res New		$8,770.00	7	$8,770.00	7
Elec Service Res ONLY		$49,800.00	28	$49,800.00	28
Fire Equipment Install		$20,490.40	6	$20,490.40	6
Found Repair		$119,184.00	12	$119,184.00	12
Garage		$18,000.00	1	$18,000.00	1
Generator		$50,198.00	7	$50,198.00	7
HVAC (Boiler)		$51,677.00	8	$51,677.00	8
HVAC (Com)		$17,000.00	2	$17,000.00	2
HVAC (Res)		$350,285.00	64	$350,285.00	64
Limited Activity - 7 Day		$0.00	0	$0.00	0
New Business		$0.00	0	$0.00	0
OP - Operating Permit		$0.00	0	$0.00	0
Plumbing Alteration		$456,996.00	101	$456,996.00	101
Plumbing Hot Water Tank		$36,573.78	28	$36,573.78	28
Plumbing New		$427,340.00	27	$427,340.00	27
Res Addition		$340,000.00	4	$340,000.00	4
Res Interior Alteration		$146,380.00	8	$146,380.00	8
Res New 1 Family		$1,030,900.00	3	$1,030,900.00	3
Res New Attached		$800,000.00	1	$800,000.00	1
Res Repair/Remodel		$38,000.00	2	$38,000.00	2
Roof (Com)		$55,000.00	1	$55,000.00	1
Roof (Res)		$350,755.00	28	$350,755.00	28
Shed		$6,000.00	2	$6,000.00	2
Siding (Res)		$44,850.00	2	$44,850.00	2
Signs		$157,925.00	16	$157,925.00	16
Solar Panels		$151,297.00	7	$151,297.00	7
Telecom		$40,000.00	2	$40,000.00	2
		$8,381,866.18	414	$8,381,866.18	414

With valuations tracked, you can take advantage of all reports in IPS that include that data field:

- Permit Types
- Permit Monthly
- Permit Valuation Summary
- Monthly Count for Census
- F.W. Dodge Report

If you have any questions, please contact a BAS Customer Service Representative at 518.371.6869 or support@basgov.com and someone will be happy to answer your assist.

Fee Groups can be setup to help users to group their fees according to Departments or by Town Account numbers.

The Fee Group tool is located under the MAINTENANCE tab. Select FEES AND PAYMENTS and then choose FEE GROUPS.
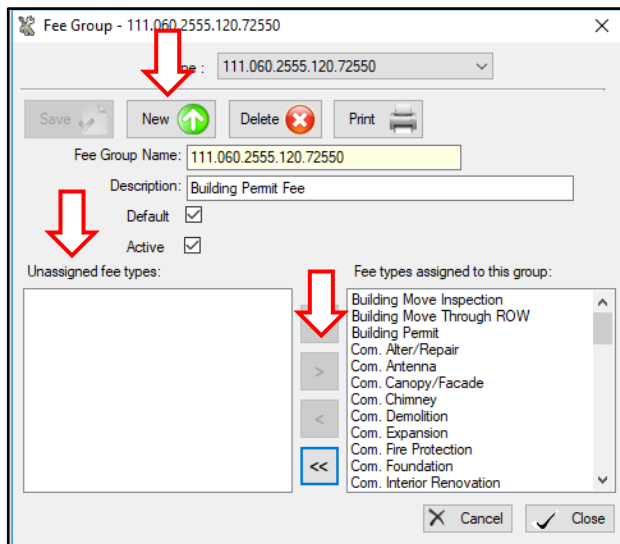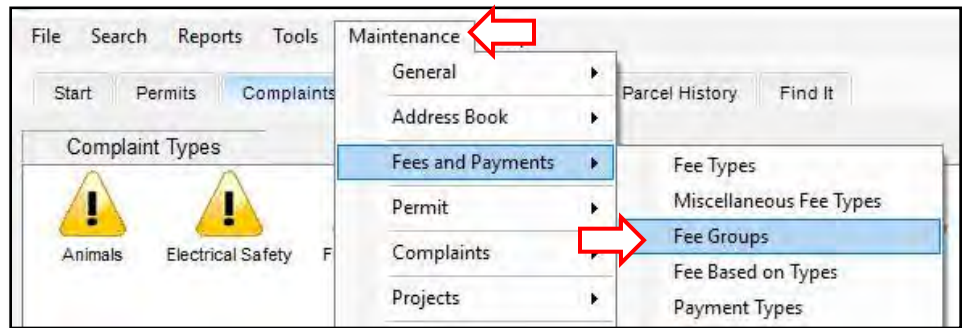
Fee Groups can be broken down according to Department Type (e.g. Plumbing), or by Town account numbers.

To add a new Fee Group, click on the NEW button and add the new Fee Group name and Description, if needed.

Unassigned fee types will populate on the left side, highlight the fee you would like added into your new group and click the ARROW in the center to push it to the right side.

Make sure to hit the SAVE button to complete the process.

Now that your Fees have been sorted by groups, you will be able to run reports and see a breakdown of your fees, as shown.

Reports can be printed or exported for emailing.

April 2019 Monthly Tip Sheet
☑ *How to Select a Different Parcel in 4x*

Have you ever begun a new application or complaint only to find out that you were provided with the wrong parcel address?

The SELECT DIFFERENT PARCEL button will allow you to keep everything from the intended permit, complaint, or project and switch it to a different parcel. Simply click on the SELECT DIFFERENT PARCEL button and enter the correct parcel.

Note: This feature is only available from the Application window.

After selecting the new parcel, a warning box will appear asking if you would like to replace the contacts. Your contact information from the previously selected parcel is most likely still desired, so you can click No.

WARNING: If you click Yes, all of your existing contacts (including contractors) will be overwritten.

Select a different parcel can also be used to migrate permit and complaint records from one parcel to another.

May 2019 Monthly Tip Sheet
☑ *How to Populate/Edit the Codebook in 4x*

Updating the IPS system with the appropriate International, State or Local code(s) gives you the ability to reference the code when issuing violations from the Complaint or Periodic Inspection modules.

To Access the Codebook, go to MAINTENANCE and select COMPLAINTS or PERIODIC INSPECTIONS, and then CODEBOOK.

The Codebook structure is shown on the left side of this window, and text for the codes is added to the right side. You can create as many chapters, subchapters, sections… as needed.

Before entering your codes, it is important to layout the proper structure to ensure things stay organized.
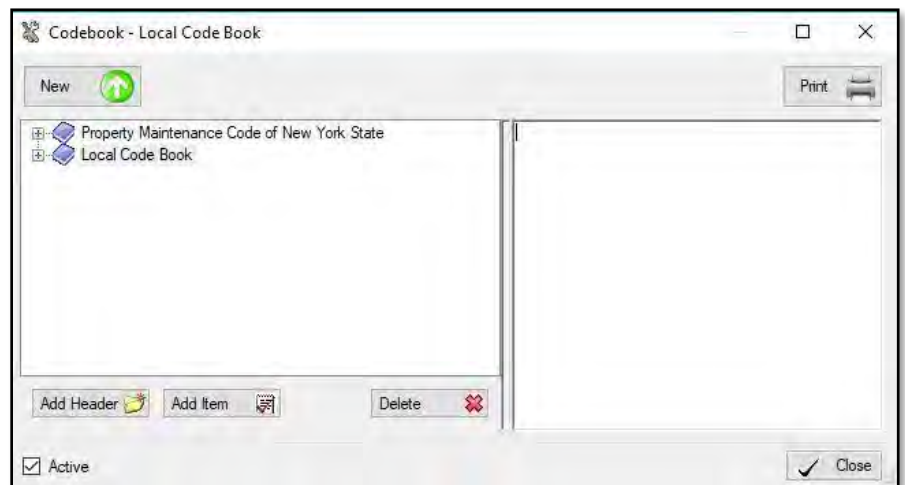
How to Enter NEW Information:

1. **CODEBOOK**- Click the NEW button and name the book accordingly.

2. **CHAPTER-** Highlight the appropriate Codebook. Click the ADD HEADER button and name the Chapter.

3. **SUBCHAPTER (Section)**- Highlight the appropriate Chapter. Click the ADD HEADER button and give it a name.

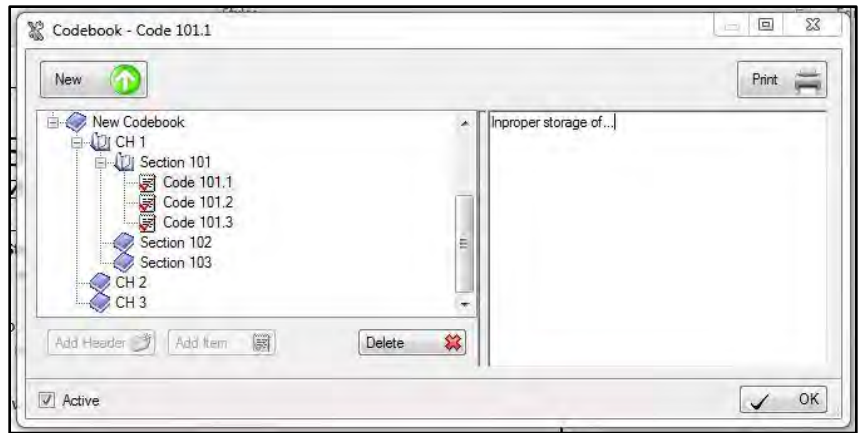4. **CODE-** Highlight the appropriate Section. Click the ADD ITEM button and give it a name.
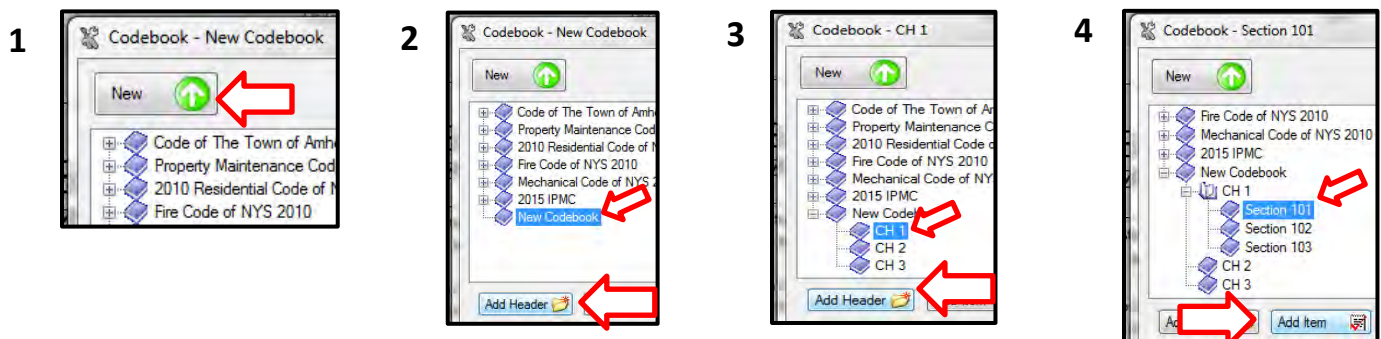
Note: To create additional codebooks and codes, you will repeat the steps above.

Transforming the way government works!

You are now ready to enter the Code……

To enter text for a code, simply highlight the item on the left and enter the text in the right side of the window.

IMPORTANT: Copying and pasting directly from an electronic source or website can bring along unwanted formatting, so we recommend copying into *Notepad* to make sure any special formatting is removed and only plain text remains.

*Note: You can copy and paste data using keyboard shortcuts: **CTRL+C** and **CTRL+V***
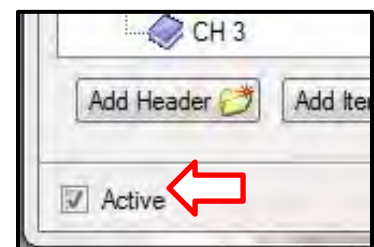
How to EDIT existing Codebook information:

IMPORTANT: Prior to editing your existing Codebook, please be aware that editing this information can affect violations that have previously used that code item.

To edit an existing header/code name, you can right click the item and select RENAME.
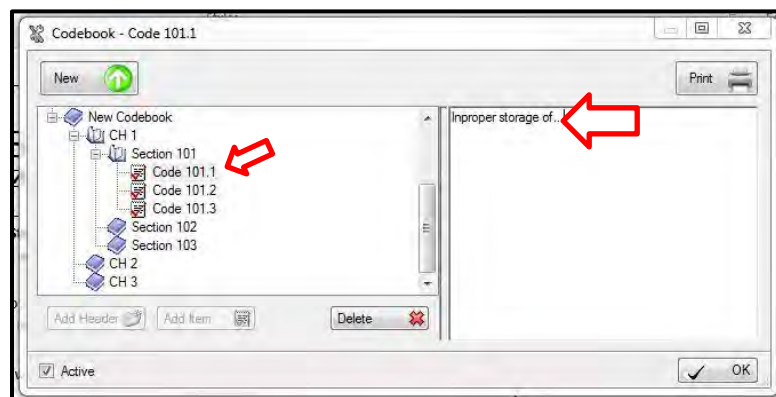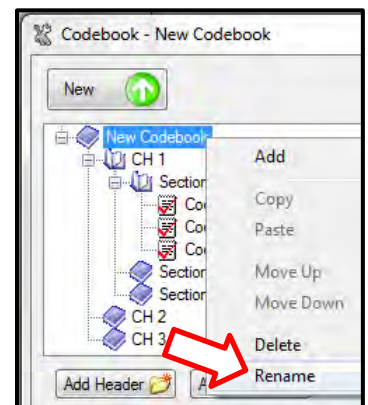
To edit the existing code, you can select the code on the left and edit the text in the right side of the window.

If a header/code is no longer needed, you can select the item and uncheck the ACTIVE checkbox. This will make the item unavailable for future use.

Transforming the way government works!