

Version 4.0

User Guide



BC Office

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WELCOME

Welcome to the BC Office User Guide.

BC Office is an office *software solution* designed for Building Certifiers by Building Certifiers. BC Office has been designed to save you time, by automating your office administration tasks, allowing you to spend more time running your business.

BC Office works seamlessly with Microsoft Office to deliver an integrated solution in both single and multiuser environments.

While initially designed to comply with the requirements of the Queensland building regulations, BC Office can easily be customised to suit your regulatory environment.

BC Office Key Features

- *Microsoft Windows 10 & Office 2016* - Designed for Microsoft Windows 10 & Office 2016 with backward compatibility.
- *Tabbed and Resizable Windows* - Common look and feel and tabbed window interface with resizable windows.
- *Microsoft Word Integration* - Generate Quotes, Information Requests, Decision Notices using customisable Word templates.
- *Microsoft Outlook Integration* - Email application documents & appointment confirmations using Outlook.
- *Dashboard* - Quick access to your applications and appointments to ensure you don't miss important milestones.
- *Application Register* - Record all your application contacts, checks, documents, fees, inspections in the application register.
- *Application Checks* - Create custom assessment, consent & certificate checklists to monitor your application workflow.
- *Integrated Calendar* - Use the customisable built-in calendar to schedule client meetings and book inspection appointments.
- *Address Book* - Use the Address Book to keep track of your client contact details, information, & notes.
- *Plan Register* - Use the plan register to record your Survey Plans and let BC Office 4 link them to your applications.
- *Import Documents* - Import documents using standard File Explorer drag and drop.
- *QBSA & QLeave Sighting Claims* - Record and process all of your Owner Builder Permit and Receipt Sighting claims.
- *Processing Time Reporting* - Keep track of your application processing times using the Processing Time Reports.
- *PDF Reports* - All BC Office 4 reports are produced as Adobe Acrobat PDF making them easy to save and distribute.
- *Offline Mode* - Take BC Office 4 with you in the field to record and generate your inspection certificates.

Contact Us

If you would like more information about us, our services or licensing requirements for BC Office please visit our website at <http://rosze.com>.

To contact our sales and support staff please email us at contact@rosze.com.

GETTING STARTED GUIDE

INSTALLING BC OFFICE

BC Office provides an easy to use Setup program which along with the following instructions will make installing your copy of BC Office as straightforward as possible.

A BC Office installation will consist of two installs, a Server Install and Client Install.

- Server Install – all shared application and database files are installed on the server.
- Client Install – all local application files are installed on the client PC.

Before commencing the install, you should first confirm that you have obtained the latest available version of BC Office by visiting our website at <http://rosze.com>.

When deciding where to install BC Office the following considerations will guide your choice.

- Is this going to be a single-user or multi-user installation?
- Is the proposed path included in your backup strategy?

Single-User Installations

A single-user installation is the simplest type of BC Office installation as the server install and client install will both occur on the same PC and there will be no need to configure any network drive mappings.

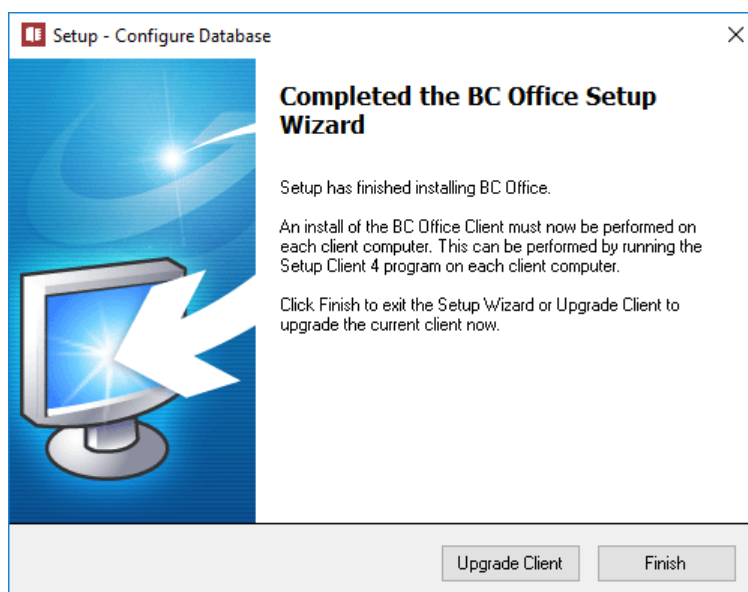
To install BC Office in a single-user environment, follow these instructions:

1. Run the downloaded Setup program and follow the onscreen instructions to install the required server files.

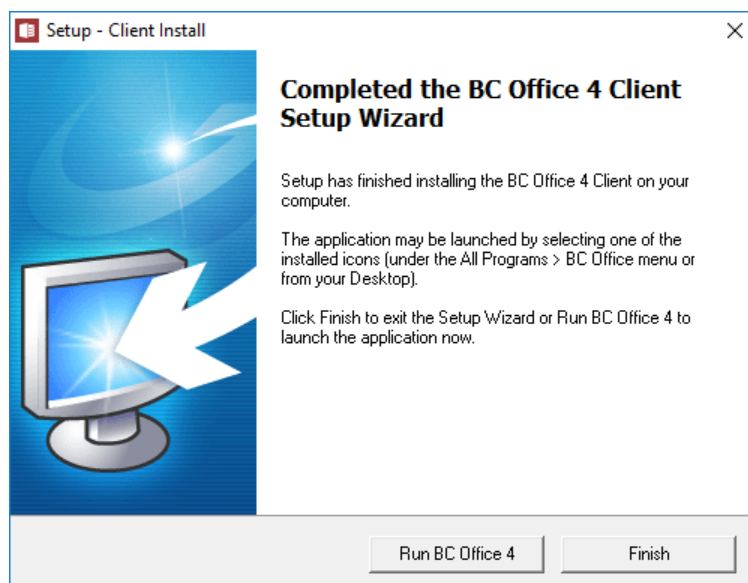


- Once the server install has completed you will be prompted to finish the install or continue with the client install at which point you should click *Upgrade Client* to continue.

If you finish the BC Office setup now, you can still run the client setup program later by running the client setup program (Setup Client.exe) from the server install folder.



- Once the client install has completed you are ready to run BC Office, which you can do by clicking *Run BC Office* (or by clicking *Finish* and running BC Office from one of the installed shortcuts).



Multi-User Installations

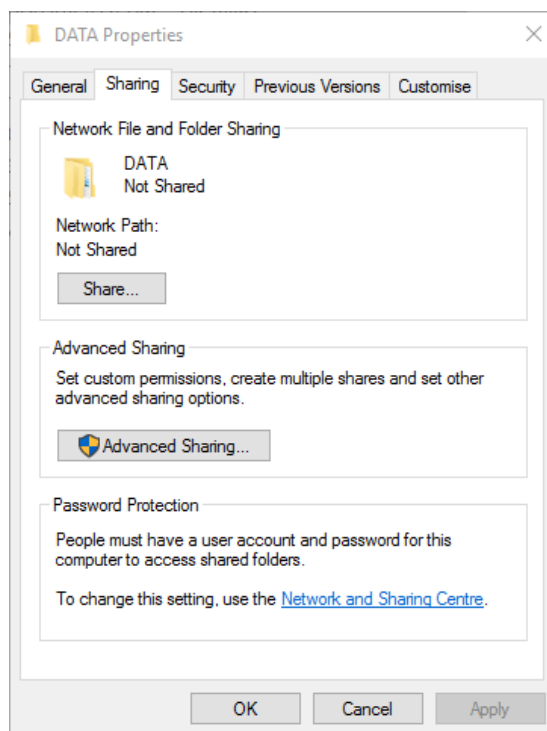
In a multi-user installation more consideration needs to be given to where BC Office is installed as all users will need to be able to access the application from a shared network drive located on a server (or a main PC which will act as the server).

Typically, your system administrator should configure your network share using the following instructions as a guide. These instructions are based on the Windows 10 operating system and may vary slightly for other versions of Windows.

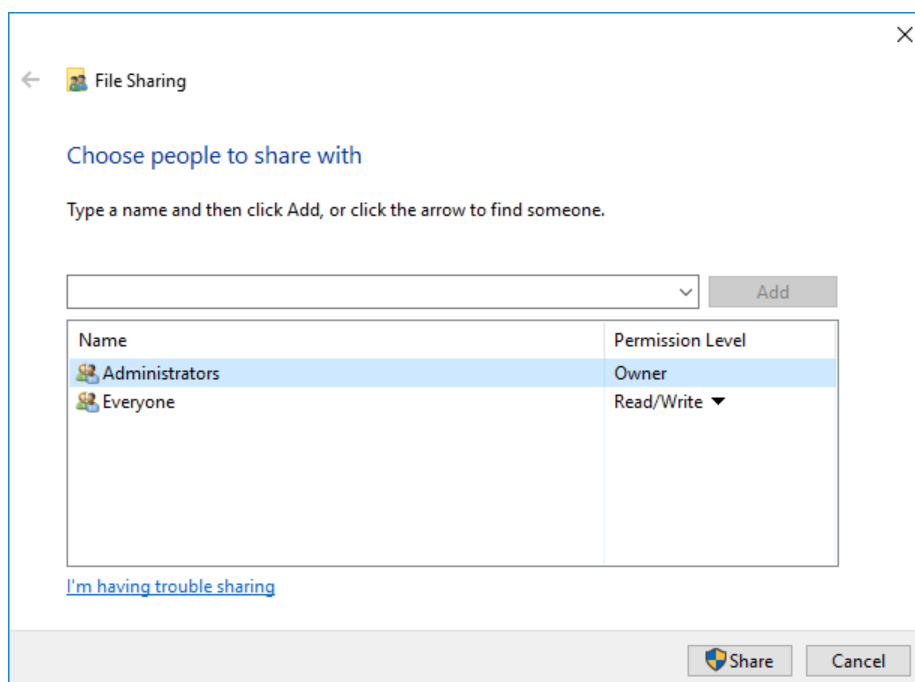
Shared Network Drive - Server Setup

On the server (or the main PC), create the shared network drive:

1. Using File Explorer, create a new folder (e.g. C:\Data) to use as your shared folder. We recommend creating a separate folder to use as the source for the share that way you can use the shared network drive to share other files and applications in addition to BC Office.
2. Again using File Explorer, right click on the new folder (e.g. C:\Data) and select the *Properties* menu item.
3. Select the *Sharing* tab on the *Properties* dialog and click the *Share* button



4. Add the *Read/Write* permission to the *Everyone* group as shown below and click the *Share* button.



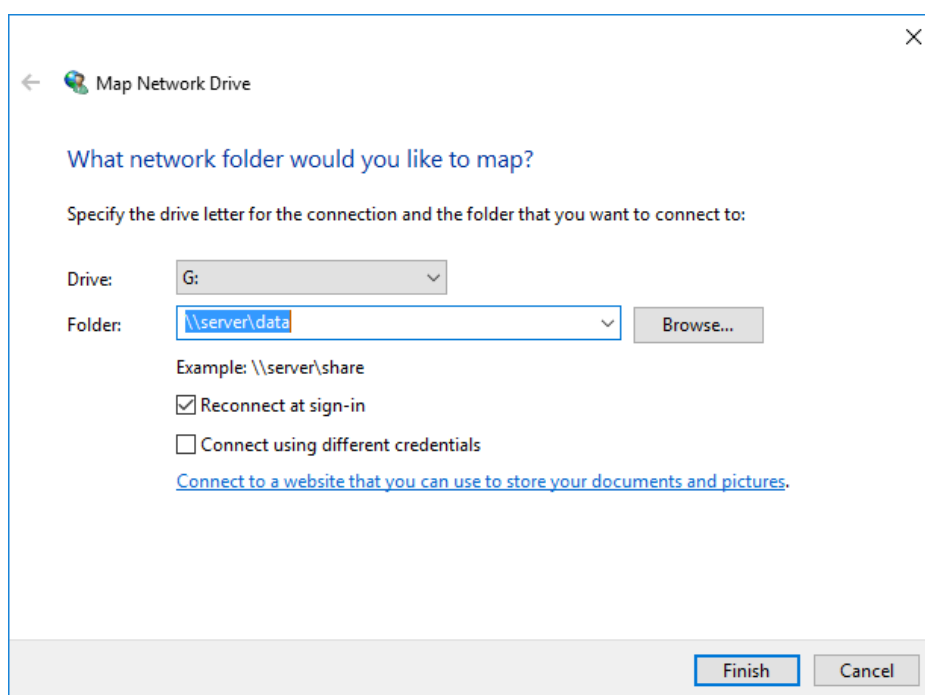
Note

If you still have permission problems running BC Office through the share you may need to check the security settings for the underlying folder on the server. These permissions need to be set the same as the share permissions (e.g. Read/Write for all users).

Shared Network Drive - Client Setup

On each client PC, create a new network drive mapping to the newly created shared network drive:

1. Using File Explorer, select the *Computer* menu and click on *Map Network Drive*.
2. Select a drive letter which you would like to assign to this drive mapping (e.g. G:). This drive letter must be the same on all client PCs.
3. Enter the shared network drive's share folder (e.g. \\yourservername\data).



Note

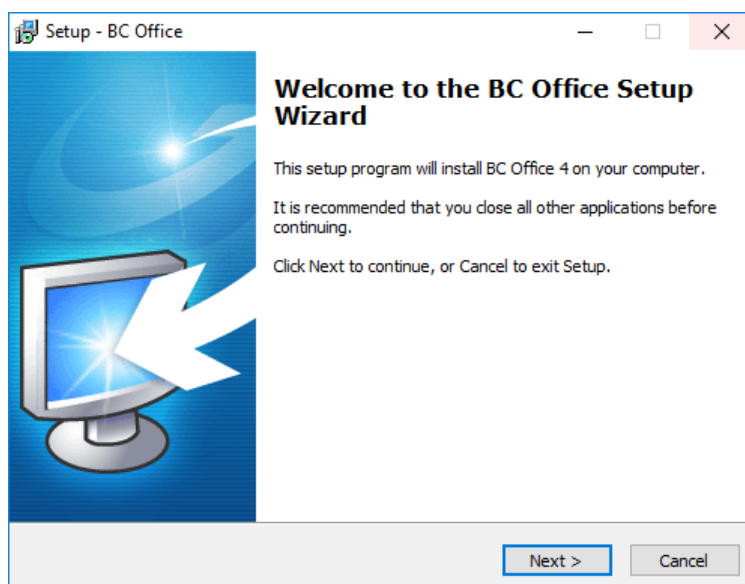
If you intend to run BC Office on the computer which is acting as the server, you must also configure the server as a client by creating a drive mapping to the shared folder and run the program through this share.

4. Click *Finish* to create the new drive mapping.

BC Office - Server Setup

To install the required BC Office server files, follow these instructions:

1. Run the downloaded Setup program and follow the on-screen instructions to install the required server files. When prompted for the *Destination Location* point the setup program to the newly created shared network drive (e.g. G:\BC Office).



2. Once the server install has completed you will be prompted to finish the install or continue with the client install at which point you can click *Finish*.

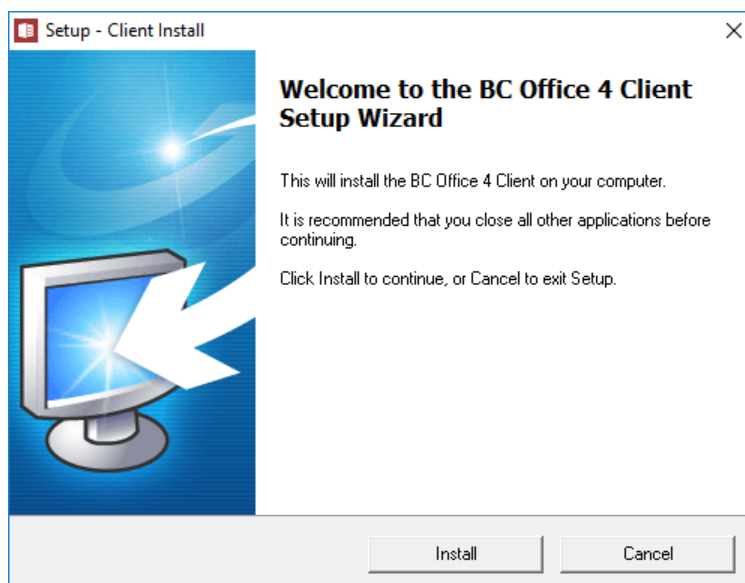
Note

If you already have BC Office installed in another location, you can move the entire BC Office folder into the shared network drive folder using File Explorer.

BC Office - Client Setup

To install the required BC Office client files, follow these instructions:

1. On each client PC, open File Explorer and browse to the BC Office folder on the shared network drive and run the client Setup program (Setup Client.exe). The client Setup program will now be shown. To complete the client install click *Install*.



2. Once the client install has completed you are ready to run BC Office which you can do by clicking *Run BC Office* (or by clicking *Finish* and running BC Office from one of the installed shortcuts).



Entering Your BC Office Licence Details

The first time you run BC Office you will be prompted to enter your licence details including your licence key. These details will be provided to you when you purchase a licence and must be entered exactly as provided.

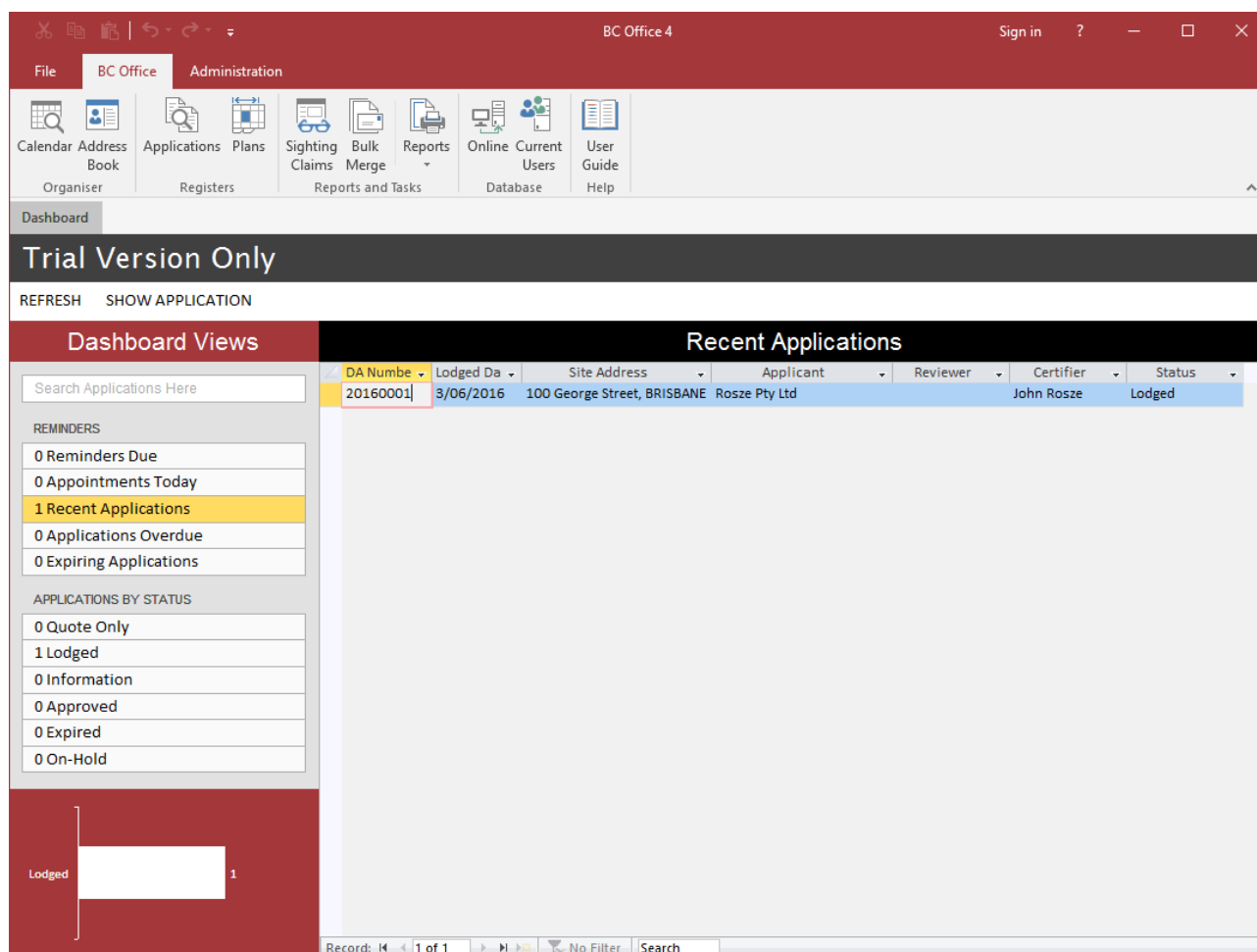
If you only want to run the trial version of BC Office, you can click *Trial* here.

The screenshot shows a window titled "Setup - Licence Details". It has a sub-header "Licence Details" and a prompt: "Enter your licence details below to activate the product or click Trial to continue with your trial." There is a small icon of a monitor with an arrow in the top right corner. The form contains the following fields: "Product Name:" with a text box containing "BC Office 4"; "Organisation Name:" with an empty text box; "Number of Licences:" with an empty text box; and "Licence Key:" with four separate text boxes for individual characters. At the bottom are "OK" and "Trial" buttons.

OVERVIEW

The Main Window

The BC Office interface consists of the *Tabbed Menu Ribbon* and the *Tabbed Form Window*. Each of these elements work together to provide a clean, user friendly environment from which you can access the features of BC Office.

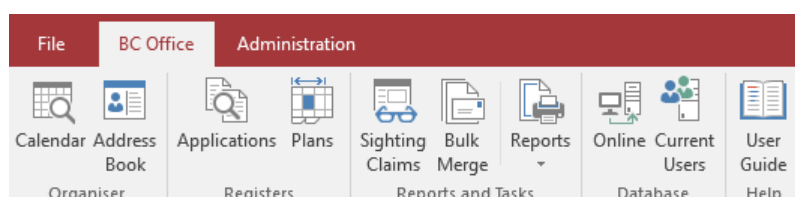


Tabbed Menu Ribbon

The tabbed menu ribbon contains the following tabs.

- The *File* tab contains print options.
- The *BC Office* tab contains menu buttons for the main BC Office functions.
- The *Administration* tab contains menu buttons for BC Office setup and administration functions.

To open a BC Office form you simply use your mouse to select the corresponding menu button from the tabbed menu ribbon. The following screenshot shows the ribbon with the default *BC Office* tab selected.



The following keyboard shortcuts can also be used to open the main BC Office forms:

- ALT-A – Find Application form
- ALT-C – Calendar form

- ALT-B – Address Book form
- ALT-P – Plan Register form

Tabbed Form Window

This is where the BC Office forms will be opened and where you will perform most of your work. BC Office supports multiple forms being opened at the same time allowing you to quickly switch from one form to another.

You can quickly switch between open forms using CTL-TAB.

The Dashboard

The Dashboard form is always open in BC Office and provides quick access to your information using several views. These views will ensure you don't miss important events on your applications.

The Dashboard consists of:

- DA quick search – allows you to quickly find and view a particular DA
- Reminder views – provides a list view of important appointment and DA reminders (you can enable or disable individual reminders using the *Preferences* form)
- Status views – provides a list view of all active DAs by status
- Status graph – provides a graphical view of all active DAs by status

The following screenshot shows the Dashboard's *Appointments Today* reminder view.

Trial Version Only

REFRESH
SHOW APPLICATION
SHOW APPOINTMENT

Dashboard Views	Appointments Today																									
<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> Search Applications Here </div> <div> REMINDERS 0 Reminders Due 2 Appointments Today 1 Recent Applications 0 Applications Overdue 0 Expiring Applications </div> <div> APPLICATIONS BY STATUS 0 Quote Only 1 Lodged 0 Information 0 Approved 0 Expired 0 On-Hold </div> <div style="margin-top: 10px;"> <div style="background-color: #a00; color: white; padding: 5px; display: flex; align-items: center;"> } <div style="border: 1px solid white; padding: 5px; flex-grow: 1;">Lodged</div> 1 </div> </div>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;">3/06/2016</td> <td style="width: 15%;">8:00 AM</td> <td colspan="3">Start of the day meeting</td> </tr> <tr> <td></td> <td>8:30 AM</td> <td colspan="3" style="text-align: right;">®</td> </tr> <tr> <td>3/06/2016</td> <td>8:30 AM</td> <td>Site Address</td> <td>100 George Street, BRISBANE</td> <td>Applicant</td> </tr> <tr> <td></td> <td>9:00 AM</td> <td>DA Number</td> <td>20160001</td> <td>Rosze Pty Ltd</td> </tr> <tr> <td></td> <td></td> <td>Building Work</td> <td>Inspection Type</td> <td>Slab</td> </tr> </table>	3/06/2016	8:00 AM	Start of the day meeting				8:30 AM	®			3/06/2016	8:30 AM	Site Address	100 George Street, BRISBANE	Applicant		9:00 AM	DA Number	20160001	Rosze Pty Ltd			Building Work	Inspection Type	Slab
3/06/2016	8:00 AM	Start of the day meeting																								
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	9:00 AM	DA Number	20160001	Rosze Pty Ltd																						
		Building Work	Inspection Type	Slab																						

Records: 1 of 2 No Filter Search

When in a reminder or DA status view you can quickly access the *Application*, *Calendar* or *Address Book* form by double-clicking on the view entry or by selecting the appropriate menu command.

The application quick search can also be used to perform a quick DA search by searching for either the DA number or any portion of the site address. If searching by DA number, the *Application* form will be opened at the found application.

Understanding Reminders

Reminders are a simple way for BC Office to notify you of upcoming events or actions which may require your attention. The following reminders are supported:

- **Reminders Due** – this reminder shows *Action Note* reminders due in the next 7 days.
- **Appointments Today** – this reminder shows calendar appointments due today.
- **Recent Applications** – this reminder shows all applications lodged in the past 28 days.
- **Applications Overdue** – this reminder shows all applications which haven't been approved within 28 days.
- **Expiring Applications** – this reminder shows all applications which are due to expire within 7 days.

Note

If there are any reminders due today, a reminder alert will be displayed when BC Office is first opened.

Each reminder can be separately customised and enabled/disabled using the Preferences form.

A Sample Form

Each form within BC Office contains a command bar which provides access to the form's actions. Think of the command bar as the place where all of the form's buttons are located. The available command buttons may differ depending on the task you are performing or on the current status of the displayed record (e.g. the *Save* command button will be disabled when viewing a read only record).

The following screenshot shows the *Calendar* form.

The screenshot displays the 'Calendar' form interface. At the top, there is a command bar with buttons: SAVE, DELETE, SEARCH, PRINT, EMAIL, and TODAY. Below this, the 'Calendar Views' section shows a calendar for June 2016 with the 3rd highlighted. The main view is titled 'Friday, 3 June 2016 (Inspection Bookings 1 (Half Hour))'. It includes a section for 'Enter Calendar Day Notes Here' with a note: 'Additional notes can be entered in each appointment'. The calendar shows appointments starting at 8:00 AM. The first appointment is 'Start of the day meeting' from 8:00 AM to 8:30 AM. The second appointment is 'Site Address 100 George Street, BRISBANE' from 8:30 AM to 9:00 AM, with 'DA Number 20160001' and 'Building Work' as details. The third appointment is 'Inspection Type Slab' from 9:00 AM to 9:30 AM. The form also includes a 'Record' section with '1 of 16' records, a 'No Filter' button, and a 'Search' field. The 'Inspection Type' section has radio buttons for 'DA Inspection', 'General Meeting', and 'All Day Event'. The 'Subject' field contains 'Start of the day meeting'. The 'Appointment Date' is '3/06/2016' and the 'Appointment Time' is '8:00 AM' to '8:30 AM'. A footer note states 'Created by Gavin on 03/06/2016 at 05:37 PM'.

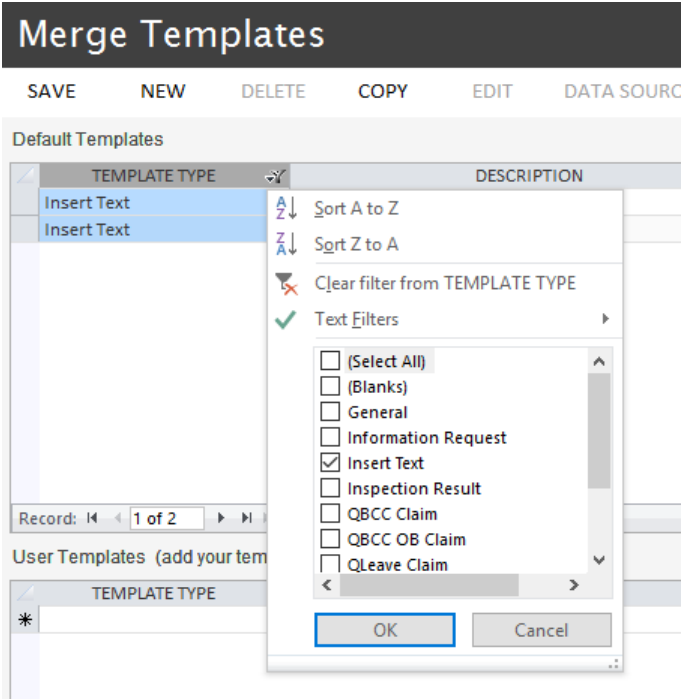
Using the Quick Filter menu

The Quick Filter menu provides useful commands which support temporary filtering and sorting of list results. Filtering is a feature that lets you cut down the total number of records so you see only those that interest you. Sorting options allows you to choose the fields and direction you want to sort by.

The Quick Filter menu is available by selecting the dropdown menu on the column header of the field you want to filter or sort. When a filter has been applied to the list results an icon will appear in the filtered column. When an alternative sort order has been applied to the list results an icon will appear in the current sort column.

Applied filters and sort orders are only temporary and will be reset once the form is reopened.

The following screenshot shows a filter being applied to the *Merge Template* form to show only *Insert Text* templates.



A Sample Report

The following screenshot shows the *Calendar Appointments* report. Each report within BC Office is generated as an Adobe Acrobat PDF.

Note
You will need to install the free Adobe Acrobat Reader to open the BC Office reports.

Calendar Appointments

Trial Version Only

Inspection Bookings 1 (Half Hour)				
Friday, 13 May 2016				
8:00 AM	Site Address	300 Queen Street, BRISBANE	Applicant	
8:30 AM	DA Number	20160001	Building Work	Inspection Type Slab
8:30 AM				
9:00 AM				
9:00 AM	Meet client in office			
9:30 AM				

LODGING YOUR FIRST APPLICATION

The purpose of this section is to guide you through the steps required to lodge your first application.

Before you can lodge an application you first need to add the application's Local Authority and Building Certifier contact details into the *Address Book*. Once the contacts are in the *Address Book* you can refer to the contact from any application.

These steps will show you how to perform the following actions:

- Add your profile details to *Preferences*
- Add a new Suburb to the *Suburb* register
- Create a New Contact in the *Address Book*
- Create a New Application
- Link a Contact to the Application
- Generate a Notice of Engagement letter

Add your profile details to Preferences

1. Select the *Preferences* menu button from the *Administration* tab on the menu ribbon.
2. On the *Profile* tab enter your business address and contact details.

The screenshot shows the 'Preferences' dialog box with the 'Profile' tab selected. The dialog has a title bar 'Preferences' with a close button (X). Below the title bar are buttons: 'SAVE', 'UPDATE LICENCE', 'VALIDATE DA STATUS', 'RESET DA NUMBER', and 'CLEAR LOGINS'. The 'Profile' tab is active, showing the following fields:

- Organisation:** Trial Version Only
- Number of Licences:** 2
- Licence Key:** KGTK-P356-LUL4-YAG7
- REGISTERED ADDRESS:** 100 George Street, BRISBANE QLD 4000
- POSTAL ADDRESS:** 100 George Street, BRISBANE QLD 4000
- CONTACT DETAILS:**
 - Phone Number:** 07 3333 7890
 - Mobile Number:** 0433 3378 90
 - ABN:** 123 456 789
 - Facsimile Number:** (empty)
 - E-mail:** trial@rosze.com

3. Once you have entered your details click *Save* and close the form (by clicking the X button or pressing *ESC* on the keyboard).

Note

These profile details will be used by the merge templates and will appear in the merge data source.

Add a new Suburb to the Suburb register

1. Select the *Suburbs* menu button from the *Administration* tab on the menu ribbon.

SUBURB	STATE	POSTCODE	Active
BRISBANE	QLD	4001	<input checked="" type="checkbox"/>
TOOWONG	QLD	4068	<input checked="" type="checkbox"/>
*			<input checked="" type="checkbox"/>

2. Enter the suburb details for the new application, if not already existing.
3. Once you have completed the suburb entry click *Save* and close the form.

Create a New Contact in the Address Book

1. Select the *Address Book* menu button from the *BC Office* tab on the menu ribbon.
2. Click the *New* command button.

Name	Organisation	Phone	Mobile	Facsimile	Email
Brisbane City Council	Brisbane City Council				
John Rosze	Rosze Certification	07 3333 7890	0433 337 890		
Rosze Pty Ltd	Rosze Pty Ltd	0439 337 870			contact@rosze.com

Record: 14 of 3

Contact Details Applications Action Notes

Contact Name: Brisbane City Council Organisation: Brisbane City Council

Phone: E-mail:

Mobile: Facsimile:

REGISTERED ADDRESS

Suburb: State: Postcode:

POSTAL ADDRESS

Suburb: State: Postcode:

ADDITIONAL INFORMATION

INFORMATION VALUE

CONTACT GROUPS

GROUP

Local Authority

Add Delete

3. On the *Contact Details* tab enter the Local Authority's contact details. At this point the only mandatory contact information is the *Contact Name*. However, you should try to complete all of the contact fields as these details will be used when generating your merge letters.
4. Click *Save* to save the new contact and enable the *Additional Information* and *Contact Groups* fields.

- Under *Additional Information*, select *DA Lodgement Fee* for the *Information* field and enter the Local Authority's DA lodgement fee if known.
- Under *Contact Groups*, select *Local Authority* for the *Group* field.

Note

The Additional Information and Contact Groups fields will only be editable once the new contact has been saved for the first time.

If you don't perform this step the Local Authority will not appear in the Local Authority list on the Application form.

- Once you have completed the Local Authority contact entry re-click *Save*.
- Click the *New* command button again and repeat the above process to enter the Building Certifier's contact details. However, this time select *Certifier QBCC Number* under *Additional Information* to enter the certifier's licence number and *Building Certifier* for the *Group*.
- Once you have completed the Building Certifier contact entry click *Save* on the command bar and close the form.

Hint

Consider entering all of your most frequently used Local Authority, Builder and Building Certifier contacts into the Address Book before lodging your applications.

Create a New Application

- Select the *Applications* menu button from the *BC Office* tab on the menu ribbon.
- Click the *New* command button on the *Find Application* form.

- On the *Application* form, enter the *Site Address*, *Local Authority* and *Lodged Date* then click *Save* on the command bar to create the application and to enable the remaining application fields.
- You can now enter the remaining application details starting with the *Real Property Description*, *Reviewed By* and *Certified By* fields.
- Click on the *Building Work* tab and enter the building work details.
- If the *QBCC Insurance* and *QLeave Levy* are applicable for these building works tick the corresponding checkbox on the *Building Work* tab.

Link a Contact to the Application

1. Click the **Add** button on the **Contact Names** tab of **Application** form to open the **Select Contact** form.
2. Select the **Relationship** type at the top of the form.
3. Using the search criteria perform a search for your contact.

Select Contact

SEARCH CLEAR SELECT NEW

Relationship **Applicant & Owner** Search

Name	Organisation	Mobile	Phone
Brisbane City Council	Brisbane City Council		
John Rosze	Rosze Certification	0433 337 890	07 3333 7890
Rosze Pty Ltd	Rosze Pty Ltd		0439 337 870

Record: 1 of 3 Filtered Search

4. If the contact is not in the **Address Book**, click the **New** command button and follow the above steps to create the new contact using the **Address Book Contact** form. Once the contact is entered perform the search again to find the contact.
5. Highlight the required contact and click the **Select** command button to create the relationship link and return to the **Application** form.

Application

SAVE NEW DELETE PRINT LETTERS EMAIL

Lodged **20160001**

Quoted On
Lodged On 3/06/2016
Information Received
Approved On
Expires On
Submitted To LA On
Finalised On
On-Hold On
Cancelled On
File Archived On
File Archive Location
Reviewed By
Certified By John Rosze
No unpaid fees recorded
0 of 0 included inspections used
0 of 0 included hours used
DRAG NEW DOCUMENTS HERE
CLICK TO OPEN DOCUMENT FOLDER

BUILDING SITE
Building
Street Address 100 George Street
Suburb BRISBANE
State QLD Postcode 4001
Land Area 2000 Zone Commercial
Local Authority Brisbane City Council

REAL PROPERTY DESCRIPTION
Lot Plan Type Plan

Contact Names Building Work Checks Documents Fees Hours Inspections Action Notes Additional Information

Add Delete

Relationship	Name	Organisation	Phone	Mobile	Facsimile	Email
Applicant	Rosze Pty Ltd	Rosze Pty Ltd	0439 337 87			contact@rosze.com
Owner	Rosze Pty Ltd	Rosze Pty Ltd	0439 337 87			contact@rosze.com

Record: 1 of 2 No Filter Search

Enter Key Application Notes Here
Additional notes can be entered under Action Notes

Generate a Notice of Engagement letter

1. Click the *Letters* command button on the *Application* form.

Letter Merge																										
RUN MERGE																										
Step 1 - Select a merge template	Step 2 - Optionally select the additional text to be inserted into the letter																									
<table border="1"> <thead> <tr> <th>MERGE TEMPLATES</th> </tr> </thead> <tbody> <tr><td>Assessment Checks</td></tr> <tr><td>Certificate of Classification</td></tr> <tr><td>Compliance Certificate for Building Design</td></tr> <tr><td>Decision Notice Approval</td></tr> <tr><td>Decision Notice Approval With Conditions</td></tr> <tr><td>Decision Notice Refusal</td></tr> <tr><td>Fee Quotation</td></tr> <tr><td>Fee Summary (Unpaid & Paid)</td></tr> <tr><td>Final Inspection Certificate (Class 1a and 10)</td></tr> <tr><td>Final Inspection Certificate (Swimming Pool)</td></tr> <tr><td>Final Inspection Outstanding Items</td></tr> <tr><td>Information Request</td></tr> <tr><td>Lodgement of Building Work Documentation</td></tr> <tr><td>Notice of Discontinuance of Engagement</td></tr> <tr><td>Notice of Engagement</td></tr> <tr><td>Relevant Information For Service Providers</td></tr> <tr><td>Reminder Notice of Lapsing Approval</td></tr> <tr><td>Reminder Notice of Lapsing Information Request</td></tr> <tr><td>Request for Building Information</td></tr> <tr><td>Required Consents & Certificates</td></tr> <tr><td>Standard Letter</td></tr> </tbody> </table>	MERGE TEMPLATES	Assessment Checks	Certificate of Classification	Compliance Certificate for Building Design	Decision Notice Approval	Decision Notice Approval With Conditions	Decision Notice Refusal	Fee Quotation	Fee Summary (Unpaid & Paid)	Final Inspection Certificate (Class 1a and 10)	Final Inspection Certificate (Swimming Pool)	Final Inspection Outstanding Items	Information Request	Lodgement of Building Work Documentation	Notice of Discontinuance of Engagement	Notice of Engagement	Relevant Information For Service Providers	Reminder Notice of Lapsing Approval	Reminder Notice of Lapsing Information Request	Request for Building Information	Required Consents & Certificates	Standard Letter	<table border="1"> <thead> <tr> <th>INSERT TEXT</th> </tr> </thead> <tbody> <tr><td>Conditions - Class 10a</td></tr> <tr><td>Conditions - Class 1a</td></tr> </tbody> </table>	INSERT TEXT	Conditions - Class 10a	Conditions - Class 1a
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2. On the *Letter Merge* form select the *Notice of Engagement* template and click the *Run Merge* command button and wait for the merge to complete.
3. Edit the generated letter as required before saving your changes in Microsoft Word.

Note

BC Office will automatically generate the letter and will save it under the application's document folder (within the server BC Office folder location).

*To save additional changes to the generated letter simply select **Save** within Microsoft Word. Do not select **Save As** or try to rename the file.*

Congratulations you have just created your first application.

To learn more about each of the BC Office forms please read the Form User Guide.

FORM USER GUIDE

(UNDERSTANDING THE BC OFFICE FORMS)

ADDRESS BOOK

About the Address Book

The central *Address Book* helps you keep track of all your important client contact details and related information. The *Address Book* consists of the following forms:

- *Address Book* – used to view, add and maintain contacts
- *Suburbs* – used to add and maintain suburbs

Using the Address Book form

The *Address Book* form is used to view, add and maintain contacts, including address and contact details. From this form you can also email the selected contact using your local Microsoft Outlook client.

Search by Group – To view all members of a group, select the group name from the *Contact Group* views. The *Address Book* results will be filtered to show only contacts who are a member of the selected group.

Search by Name – To further refine the *Address Book* results, within the selected group, you can search by contact name (or organisation) using the search field. For best results, refer to the following search hints.

The *Applications* tab can be used to see all applications currently linked to the selected contact. The *Action Notes* tab can be used to create notes against the selected contact.

Search Hints

1. If you are not sure which group the contact is a member of, use the *ALL CONTACTS* group (all contacts are a member of this group).
2. Try searching using only the first couple of letters of the contact's name.
3. If you enter a portion of the contact name, try to use a portion of the name which is not easily misspelt (this will help reduce spelling errors).

Note

All contacts will appear in the ALL CONTACTS group and a contact can be a member of more than one group.

The *Additional Information* fields allow you to record additional information using a customisable list of information codes. While BC Office provides several default information codes, you can easily add your own codes using the *Codes* form. In the above screenshot the Local Authority's *DA Lodgement Fee* (which is a default information code) is being maintained in the information fields.

The *Contact Groups* field allows you to add the contact to one or more groups. While BC Office provides several default group codes, you can easily add your own codes using the *Codes* form. In the above screenshot the contact has been added to the *Local Authority* group.

To help speed up the lodgement process we recommend adding all of your most frequently used Local Authority, Builder and Building Certifier contacts into the Address Book as early as possible.

1. *Local Authorities*

When lodging new applications, the *Local Authority* field is mandatory and must be selected from an existing list of Local Authorities. Therefore, the Local Authority contact must be added before the application can be saved. To create a new Local Authority contact, add the contact to the *Local Authority* group and add the Local Authority's *DA Lodgement Fee*, if known, to the *Additional Information* fields.

2. *Builders*

To create a new Builder contact, add the contact to the *Builder* group and add the Builder's *Builder QBCC Number*, if known, to the *Additional Information* fields.

3. *Building Certifiers*

When approving new applications, the *Certified By* field is mandatory and must be selected from an existing list of Building Certifiers. Therefore, the Building Certifier contact must be added before the application can be approved. To create a new Building Certifier contact, add the contact to the *Building Certifier* group and add the Building Certifier's *Certifier QBCC Number*, if known, to the *Additional Information* fields.

Note

*All mandatory fields are highlighted by a **bolded** field label or CAPITALISED column label. Mandatory fields must contain a valid value before any changes can be saved.*

Using the Suburbs form

The *Suburbs* form is used to maintain the list of suburbs used within BC Office. If a suburb is no longer required, the suburb can be deactivated by un-checking the *Active* field.

The screenshot shows the 'Suburbs' form interface. At the top, there are buttons for 'SAVE', 'NEW', and 'DELETE'. Below these is a table with the following columns: SUBURB, STATE, POSTCODE, and Active. The table contains three rows: 'BRISBANE' with state 'QLD' and postcode '4001', 'TOOWONG' with state 'QLD' and postcode '4068', and a new entry marked with an asterisk (*) with state 'QLD' and postcode '4068'. The 'Active' column for all rows has a checked checkbox.

SUBURB	STATE	POSTCODE	Active
BRISBANE	QLD	4001	<input checked="" type="checkbox"/>
TOOWONG	QLD	4068	<input checked="" type="checkbox"/>
*	QLD	4068	<input checked="" type="checkbox"/>

CALENDAR

About the Calendar

The customisable built-in *Calendar* allows you to schedule client meetings and book inspections for your applications. The *Calendar* consists of the following forms:

- *Calendar* – used to add and maintain appointment details
- *Repeat Schedule* – used to create repeat appointment schedules
- *Find Appointment* – used to search for an existing appointment
- *Preferences (Calendar tab)* – used to add and maintain calendars and calendar times

Using the Calendar form

The *Calendar* form is used to add and maintain appointments. The *Calendar* form supports multiple calendars (configured using the *Preferences* form) each defined with their own set of appointment times.

The screenshot displays the 'Calendar' application window. At the top, there is a title bar 'Calendar' with a close button. Below it is a menu bar with options: SAVE, DELETE, SEARCH, PRINT, EMAIL, and TODAY. The main area is divided into two panes. The left pane, titled 'Calendar Views', shows a calendar for June 2016 with the 3rd highlighted. Below the calendar is a list of views: 'Inspection Bookings 1 (Half Hour)' (selected) and 'Inspection Bookings 2 (Hour)'. The right pane, titled 'Friday, 3 June 2016 (Inspection Bookings 1 (Half Hour))', contains a form for entering appointment details. It includes a section for 'Enter Calendar Day Notes Here' with a note: 'Additional notes can be entered in each appointment'. Below this is a list of appointments for the day, starting with '8:00 AM Start of the day meeting'. The selected appointment is expanded, showing details: '8:30 AM' to '9:30 AM', 'Site Address: 100 George Street, BRISBANE', 'Applicant: Rosze Pty Ltd', 'DA Number: 20160001', 'Building Work', and 'Inspection Type: Slab'. At the bottom of the right pane, there is a search bar, a record count '1 of 16', and a 'No Filter' button. The footer of the right pane states 'Created by Gavin on 03/06/2016 at 05:37 PM'.

The *Search* command button is used to open the *Find Appointment* form. This form allows you to search for an existing appointment anywhere within the Calendar.

Use the *Print* command button to print an appointment report for the selected calendar and date.


Use the *Email* command button to email the appointment details using your local Microsoft Outlook client.

The *Today* command button is used to return the calendar to today's appointments.

The *Show Application* command button is used to open the *Application* form on the current appointment's linked application (*DA Inspection* appointments only).

The *Show Inspection* command button is used to open the *Inspection* form on the current appointment's linked application (*DA Inspection* appointments only).

The *Select Application*  button is used to open the *Select Application* form to search for an application to link to the appointment (*DA Inspection* appointments only).

The *Repeat Schedule*  button is used to open the *Repeat Schedule* form for the current appointment (*General Meeting and All Day Event* appointments only).

Adding a new appointment

To add a new calendar appointment, follow these simple steps:

1. Select the required calendar from the list of *Calendars* (e.g. in the above screenshot the *Inspection Bookings 1 (Half Hour)* calendar is selected).
2. Select the appointment date on the calendar.
3. Select the appointment time from the available calendar times.
4. Enter the appointment details and click the *Save* command button.

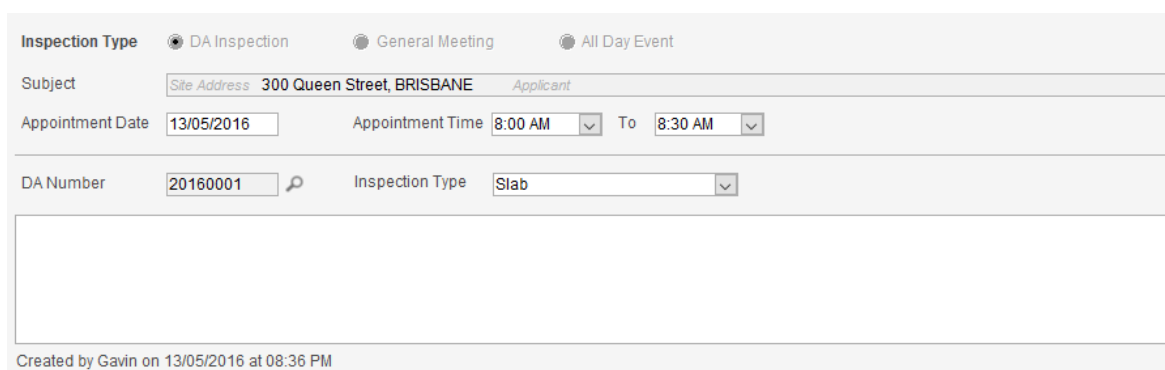
Navigating the calendar


You can navigate around the calendar using the calendar control or using the following keyboard shortcuts.

Keyboard Shortcuts	
Shortcut	Key
Today's Date	Home
Previous Appointment	Up
Next Appointment	Down
Previous Calendar	Ctrl+Up
Next Calendar	Ctrl+Down
Previous Day	Left
Next Day	Right
Previous Month	Ctrl+Left
Next Month	Ctrl+Right

DA Inspections

This appointment type is used to record all application inspection bookings. The new appointment will look similar to the following for *DA Inspection* appointments.



When entering the appointment's *DA Number*, you can type the number directly into the *DA Number* field or, say you don't know the number but you know the site address, you can use the search button , to open the *Select Application* form, where you can perform a search for the application.

Once the appointment has been saved, you can use the *Show Application* command button to open the *Application* form and the *Show Inspection* command button to open the *Inspection* form.

Note

The inspection appointment's Subject field will automatically be updated with the application's site address and building work description.

You cannot create a repeating appointment for a DA Inspection appointment type.

You cannot enter an appointment which will conflict with an existing appointment.

General Meetings

This appointment type is used to record all general appointments. The new appointment will look similar to the following for *General Meeting* appointments.

The screenshot shows a form for creating a 'General Meeting' appointment. At the top, there are three radio buttons for 'Inspection Type': 'DA Inspection', 'General Meeting' (which is selected), and 'All Day Event'. Below this is a 'Subject' text field containing 'Meet client in office'. Underneath the subject field are two rows: 'Appointment Date' with a date picker set to '13/05/2016' and a repeat icon, and 'Appointment Time' with a time dropdown set to '9:00 AM', followed by 'To' with a time dropdown set to '9:30 AM'. A large empty text area for comments is below these fields. At the bottom, a status bar reads 'Created by Gavin on 13/05/2016 at 08:37 PM'.

Once the appointment has been saved, you can use the *Repeat Schedule*  button to setup a repeat schedule for the new appointment.

Note

If you update the Subject or Comment field on the first appointment of a repeat schedule all repeat appointments will be updated automatically.

Once a repeat schedule has been defined, you cannot change the appointment date or time on the first appointment of the repeat schedule.


You cannot enter an appointment which will conflict with an existing appointment.

All Day Events

This appointment type is used to record an all-day appointment. The new appointment will look similar to the following for *All Day Event* appointments.

The screenshot shows a form for creating an 'All Day Event' appointment. At the top, there are three radio buttons for 'Inspection Type': 'DA Inspection', 'General Meeting', and 'All Day Event' (which is selected). Below this is a 'Subject' text field containing 'Office closed'. Underneath the subject field is a single row for 'Appointment Date' with a date picker set to '14/05/2016' and a repeat icon. A large empty text area for comments is below these fields. At the bottom, a status bar reads 'Created by Gavin on 13/05/2016 at 09:48 PM'.

An all-day appointment will automatically block out all appointment times for that day.

Once the appointment has been saved, you can use the *Repeat Schedule*  button to setup a repeat schedule for the new appointment.

Note


If you update the Subject or Comment field on the first appointment of a repeat schedule all repeat appointments will be updated automatically.

Once a repeat schedule has been defined, you cannot change the appointment date or time on the first appointment of the repeat schedule.

You cannot enter an appointment which will conflict with an existing appointment.

*All mandatory fields are highlighted by a **bolded** field label or CAPITALISED column label. Mandatory fields must contain a valid value before any changes can be saved.*

Using the Repeat Schedule form

The *Repeat Schedule* form is used to create repeat appointment schedules. The *Repeat Schedule* form can be accessed from the *Calendar* form by clicking on the *Repeat Schedule*  button.

To setup a repeat schedule you need to define the repeat interval and repeat range options. The repeat interval can be defined in Days, Work Days, Weeks, Months and Years. The repeat range can be defined directly, by entering the number of appointments, or indirectly, by entering an end date for the schedule.

You can delete all repeat appointments by clicking on the *Delete* command button.

Repeat Schedule

Repeat Schedule

SAVEDELETE

REPEAT OPTIONS

Repeat From

Friday, 3 June 2016

Every

1

Day(s)

End After

10

Appointments

Friday, 3 June 2016

Schedule Preview

Saturday, 4 June 2016	Scheduled
Sunday, 5 June 2016	Scheduled
Monday, 6 June 2016	Scheduled
Tuesday, 7 June 2016	Scheduled
Wednesday, 8 June 2016	Scheduled
Thursday, 9 June 2016	Scheduled
Friday, 10 June 2016	Scheduled
Saturday, 11 June 2016	Scheduled
Sunday, 12 June 2016	Scheduled
Monday, 13 June 2016	Scheduled

10 scheduled appointment(s).

Note

A repeat schedule can only be defined for General Meetings and All Day Events.

When deleting a repeat schedule, the original appointment from which the schedule was created, will not be deleted. Only the repeat appointments will be deleted.

You cannot modify the repeat schedule options once the schedule has been saved. To modify a repeat schedule, you must remove and recreate the schedule.

*All mandatory fields are highlighted by a **bolded** field label or CAPITALISED column label. Mandatory fields must contain a valid value before any changes can be saved.*

Using the Find Appointment form

The *Find Appointment* form is used to search for an existing appointment.

To search for an appointment, anywhere within the Calendar, use the *Search* field. In the above screenshot the *Search* field was used to find all appointments related to DA 20160001.

The *Show Appointment* command button is used to open the *Calendar* form on the highlighted appointment.

The *Show Application* command button is used to open the *Application* form on the highlighted appointment's related application (*DA Inspection* appointments only).

Use the *Print* command button to print an appointment report for the search results.

Note

The Find Appointment form will search through all Subject, DA Number, Inspection Type and Comment fields, looking for a match to the search criteria.

Setting Calendar Preferences using the Preferences form

The *Calendar* tab on the *Preferences* form is used to control the Calendar preferences. Using the *Preferences* form, you can modify the default calendars (shown below) or add your own calendars.

The screenshot shows the 'Preferences' window with the 'Calendar' tab selected. At the top, there are buttons: SAVE, UPDATE LICENCE, VALIDATE DA STATUS, RESET DA NUMBER, and CLEAR LOGINS. Below these are tabs: Profile, Options, Calendar (selected), Check Groups, and Logins. In the 'Calendar' tab, there are 'Add' and 'Delete' buttons. A list of calendars is shown on the left:


CALENDAR NAME	Active
Inspection Bookings 1 (Half Hour)	<input checked="" type="checkbox"/>
Inspection Bookings 2 (Hour)	<input checked="" type="checkbox"/>
*	<input checked="" type="checkbox"/>

On the right, there is a table for 'Inspection Bookings 1 (Half Hour)' with 'Add' and 'Delete' buttons. The table has columns for START TIME, END TIME, and Active.

START TIME	END TIME	Active
8:00 AM	8:30 AM	<input checked="" type="checkbox"/>
8:30 AM	9:00 AM	<input checked="" type="checkbox"/>
9:00 AM	9:30 AM	<input checked="" type="checkbox"/>
9:30 AM	10:00 AM	<input checked="" type="checkbox"/>
10:00 AM	10:30 AM	<input checked="" type="checkbox"/>
10:30 AM	11:00 AM	<input checked="" type="checkbox"/>
11:00 AM	11:30 AM	<input checked="" type="checkbox"/>
11:30 AM	12:00 PM	<input checked="" type="checkbox"/>
12:00 PM	12:30 PM	<input type="checkbox"/>
12:30 PM	1:00 PM	<input type="checkbox"/>
1:00 PM	1:30 PM	<input checked="" type="checkbox"/>

Modifying an Existing Calendar

You can modify an existing calendar's description, colour and times to suit your office requirements. The calendar description will appear in the list of *Calendars* on the *Calendar* form. Active calendar times will appear on the *Calendar* form as available appointment times.

To add or delete a calendar or time use the Add and Delete command buttons. To set a unique colour for each calendar use the  button.

Note

You cannot delete a calendar or time, which has been used by an existing calendar appointment. You can only deactivate the entry by unselecting the Active field.

*All mandatory fields are highlighted by a **bolded** field label or CAPITALISED column label. Mandatory fields must contain a valid value before any changes can be saved.*

Adding a New Calendar

1. Click the Add calendar command button or navigate to the new record on the *Calendar* list.
2. Enter a description for your new calendar.
3. Make sure the Active field is still ticked.
4. On the *Times* list, enter a *Start Time* for the first time slot.
5. Enter an *End Time* for the first time slot.

6. Make sure the *Active* field is still ticked.
7. Navigate to the next new record (you can press *Tab* to jump to the next field).
8. Enter a *Start Time* for the next time slot (if your time slots are continuous, this time should match the *End Time* of the previous time slot).
9. Enter an *End Time* for the time slot.
10. Make sure the *Active* field is still ticked.
11. Repeat Steps 7 to 10 for each additional time slot.
12. Click the *Save* command button to save any unsaved changes.
13. Re-open the *Calendar* form to check your new calendar settings.

Note

You cannot create or modify a calendar time which will overlap an existing time slot (i.e. the Start and End Time must not fall between the Start and End time of another time slot).

APPLICATION REGISTER

About the Application Register

The *Application Register* allows you to record all of your application contacts, checks, documents, hours worked, inspections, fees and processing history in a central location. The register consists of the following forms:

- *Find Application* – used to search for an existing application
- *Application* – used to add and maintain applications
- *Select Contact* – used to add a new contact relationship to the application
- *Check* – used to add and maintain check details (including consents)
- *Special Fire Services* – used to record Special Fire Service details
- *Inspection* – used to add and maintain inspection results
- *Action Note* – used to add and maintain action notes
- *Letter Merge* – used to perform a letter merge in Microsoft Word
- *Label Merge* – used to perform a label merge in Microsoft Word

Using the Find Application form

The *Find Application* form is used to search the register for an existing application. You can perform an application search by entering your search criteria and clicking the *Search* command button.

The *Clear* command button can be used to clear the current search results and criteria, in preparation for performing another search.

The *New* command button is used to create a new application using the *Application* form.

The *Show* command button is used to open the *Application* form on the highlighted application. You can also open the *Application* form by double clicking the application record.

The *Print* command button opens the *Application Register* report showing all search results.

The *Export* command button exports the search results to Microsoft Excel.

The *Label* command button opens the *Label Merge* form.

Search Hints

1. When entering values in the *DA Number* criteria fields, the values must be numeric.
2. To specify a list of applications to search for, you can enter a comma separated list of values in the *DA Number* criteria fields.
3. When searching using the *Site Address*, choose a portion of the address which is not easily misspelt (i.e. this will help reduce spelling errors).

4. By default, the form will search for current applications only. To search through all applications, change the *Status* search criteria to *All Applications*.

Using the Application form

The *Application* form is used to add and maintain applications. Application contacts, checks, documents, fees, hours worked, inspections and actions can also be recorded using the application tabs.

The *New* command button is used to create a new application.

The *Delete* command button is used to delete an existing application.

Note

Before you can delete an existing application you need to remove all related application records first (i.e. all information contained within the tabs).

The *Print* command button is used to run the *Application Details* report.

The *Email* command button is used to send an email using your local Microsoft Outlook client.

The *Letters* command button opens the *Letter Merge* form. Using the *Letter Merge* form you can generate a new merge letter.

About the DA Number

A system generated number is used for each application's *DA Number*. On generation of each new number the number generator is automatically incremented by 1. You can reset the current number generator value using the *Preferences* form.

The following number formats provide examples on how the number generator can be used:

- *Year & Sequence (Default)* – This option uses an 8-digit number for the *DA Number*. The first 4 digits represent the year in which the application was received and the last 4 digits represent the number of applications

received since the beginning of the year (e.g. 20110001). Under this option the number generator will need to be reset at the beginning of each year (e.g. in January 2017 the number should be reset to 20170001).

- *Sequence Only* – This option uses a simple number sequence to represent the number of applications received (e.g. the first application will be 1). Under this option the number generator doesn't need to be reset as the number will continue to increment regardless of year.

Note

If you use the default Year & Sequence number generator format and you expect to receive more than 9999 applications within a year you should increase the 8-digit number to 9 or more digits.

While the *DA Number* field is editable, the following restrictions apply when changing the number:

- The new number cannot be larger than the current value of the number generator.
- The new number cannot be the same as another application.

The following example shows how you can use the *DA Number* field to swap two DA numbers (e.g. 20160010 and 20160011), which have been entered incorrectly in reverse order.

1. On the first application (e.g. 20160010) set the *DA Number* to an interim number which is less than the number generator and which hasn't already been used. A safe number to use is 0.
2. On the second application (e.g. 20160011) set the *DA Number* to the first application's original *DA Number* (e.g. 20160010).
3. Return to the first application, now DA 0, and set the *DA Number* to the second application's *DA Number* (e.g. 20160011).

About the application Status

The application *Status* will be automatically assigned by the system based on the application's current processing history (i.e. using the application date fields).

During the application's history the following status values may be assigned:

- Quote Only* – An application fee quote has been provided but no application has yet been lodged (i.e. the application has a *Quoted On* date and no *Lodged On* date).
- Lodged* – The application has been lodged and is currently unapproved.
- Information* – The unapproved application is awaiting additional information to be provided (i.e. an *Information Request* letter has been issued and no *Information Received* date has been entered). Once the information is received and an *Information Received* date is entered the status will return to *Lodged*.
- Approved* – The application has been approved (i.e. an *Approved On* date has been entered). The application can only be approved once:
 - an *Approved Date* has been provided for all prerequisite checks (*Checks* tab)
 - all required sighting claim details have been entered on the *Sighting Claims* form
 - a Building Certifier has been selected in the *Certified By* field
- Finalised* – The application has passed final inspection. The *Finalised On* date is updated by the system once a *Satisfactory* final inspection is entered using the *Inspection* form.
- On-Hold* – The application has been placed on-hold (i.e. an *On-Hold On* date has been entered). *On-Hold* applications will be excluded from all future reminders and expiry processing.
- Cancelled* – The application has been cancelled (i.e. a *Cancelled On* date has been entered).
- Expired* – The application has expired (i.e. the application's *Expires On* date has passed and the application has not yet passed a final inspection). The *Expires On* date will default to the *Approved On* date plus the *Expiry Period* preference value (see the *Preferences* form).
- Archived* – The application file has been archived (i.e. a *File Archived On* date has been).

Note

*All mandatory fields are highlighted by a **bolded** field label or CAPITALISED column label. Mandatory fields must contain a valid value before any changes can be saved.*

About the Reviewed By and Certified By fields

The *Reviewed By* field is an optional field which can be used to record the name of the certifier who is responsible for reviewing the application.

The *Certified By* field is used to record the name of the certifier who is responsible for certifying the application approval. This field must have a valid value before the application can be approved. The *Certified By* name will also appear in all merge template data sources.

Note

Only contacts which have been included as a member of the Building Certifier group in the Address Book will be available for selection in these fields.

About the Real Property Description fields

The *RPD* fields are used to enter the building site's real property description.

REAL PROPERTY DESCRIPTION		
Lot	Plan Type	Plan
		▼
		▼
		▼
		▼
		▼

Up to 5 lot/plan descriptions can be entered using the PRD fields. In the above screenshot two lot/plan descriptions has been entered. If the entered lot/plan matches a plan already registered in the *Plan Register*, then you can open the matching plan simply by double clicking on the RPD record.

Note

The RPD fields will only be visible once the new application has been saved for the first time.

Contact Names Tab

The *Contact Names* tab is where all application contact relationships are maintained (with the exception of the Local Authority and Building Certifier contacts, which are maintained by the *Local Authority*, *Reviewed By* and *Certified By* fields).

Contact Names	Building Work	Checks	Documents	Fees	Hours	Inspections	Action Notes	Additional Information																					
<div> <div>Add</div> <div>Delete</div> </div> <table border="1"> <thead> <tr> <th>Relationship</th> <th>Name</th> <th>Organisation</th> <th>Phone</th> <th>Mobile</th> <th>Facsimile</th> <th>Email</th> </tr> </thead> <tbody> <tr> <td>Applicant</td> <td>Rosze Pty Ltd</td> <td>Rosze Pty Ltd</td> <td>0439 337 87</td> <td></td> <td></td> <td>contact@rosze.com</td> </tr> <tr> <td>Owner</td> <td>Rosze Pty Ltd</td> <td>Rosze Pty Ltd</td> <td>0439 337 87</td> <td></td> <td></td> <td>contact@rosze.com</td> </tr> </tbody> </table> <div> Record: 1 of 2 No Filter Search </div> <div> Enter Key Application Notes Here Additional notes can be entered under Action Notes </div>									Relationship	Name	Organisation	Phone	Mobile	Facsimile	Email	Applicant	Rosze Pty Ltd	Rosze Pty Ltd	0439 337 87			contact@rosze.com	Owner	Rosze Pty Ltd	Rosze Pty Ltd	0439 337 87			contact@rosze.com
Relationship	Name	Organisation	Phone	Mobile	Facsimile	Email																							
Applicant	Rosze Pty Ltd	Rosze Pty Ltd	0439 337 87			contact@rosze.com																							
Owner	Rosze Pty Ltd	Rosze Pty Ltd	0439 337 87			contact@rosze.com																							

To add a new contact relationship, via the *Select Contact* form, click the *Add* button.

To edit or view the contact details in the *Address Book Contact* form double click the contact record.

To delete an existing contact relationship, click the *Delete* button.

Note

All applications should include, as a minimum, a contact relationship for the Owner and Applicant contacts.

Building Work Tab

The *Building Work* tab is where you enter the application's proposed building work details. If needed, you can enter multiple structure and classification descriptions.

Contact Names	Building Work	Checks	Documents	Fees	Hours	Inspections	Action Notes	Additional Information																
<div> <div>Add</div> <div>Delete</div> </div> <table border="1"> <thead> <tr> <th>STRUCTURE TYPE</th> <th>CLASSIFICATION</th> <th>Floor Area</th> <th>Storeys</th> </tr> </thead> <tbody> <tr> <td>Dwelling</td> <td>Class 1A</td> <td>300</td> <td>1</td> </tr> <tr> <td>Swimming Pool and Fence</td> <td>Class 10B</td> <td></td> <td></td> </tr> <tr> <td>*</td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <div> Record: 1 of 2 No Filter Search </div> <div> <div> <input type="checkbox"/> Owner Builder <input checked="" type="checkbox"/> QBCC Permit Required </div> <div> <input checked="" type="checkbox"/> QBCC Insurance Required <input checked="" type="checkbox"/> QLeave Levy Required </div> <div> Cost of Building Work <div>\$450,000.00</div> </div> <div> Local Authority Building DA Reference <div>100090</div> </div> </div>									STRUCTURE TYPE	CLASSIFICATION	Floor Area	Storeys	Dwelling	Class 1A	300	1	Swimming Pool and Fence	Class 10B			*			
STRUCTURE TYPE	CLASSIFICATION	Floor Area	Storeys																					
Dwelling	Class 1A	300	1																					
Swimming Pool and Fence	Class 10B																							
*																								

While the *Structure Type* list of values contains most of the structure descriptions you are likely to encounter, you can easily add your own structure codes using the *Codes* form.

The *QBCC Permit Required*, *QBCC Insurance Required* and *QLeave Levy Required* fields are used to indicate that a permit/receipt sighting is required prior to approval of the application. Permit/Receipt sightings are recorded and claimed using the *Sighting Claims* form. The *Local Authority Building DA Reference* field allows you to record the Local Authority's reference for the application.

Note

If a QBCC Permit, QBCC Insurance or QLeave Levy receipt sighting is required, the application cannot be approved until the sighting details have been recorded using the Sighting Claims form.

*All mandatory fields are highlighted by a **bolded** field label or CAPITALISED column label. Mandatory fields must contain a valid value before any changes can be saved.*

Checks Tab

The *Checks* tab allows you to create a custom processing checklist for the application. Using these checks you can prevent an application from being approved or finalised until all required prerequisite checks have been completed.

The screenshot shows the 'Checks' tab in a software application. At the top, there are several tabs: 'Contact Names', 'Building Work', 'Checks' (selected), 'Documents', 'Fees', 'Hours', 'Inspections', 'Action Notes', and 'Additional Information'. Below these tabs is a toolbar with buttons: 'Add', 'Delete', 'SFS', 'Consents', 'Certificates', 'Assessments', and 'Insert'. The main area contains a table with the following columns: 'Check Category', 'Check Type', 'Prerequisite Fo', 'Start Date', 'Complete Date', and 'Reference'. The table lists several checks, with 'Building Plans' selected. At the bottom, there is a 'Record' section showing '1 of 8' and a 'Search' bar.

Check Category	Check Type	Prerequisite Fo	Start Date	Complete Date	Reference
Assessment	Building Plans	Approval			
Assessment	Code Assessment	Approval			
Assessment	Fees Paid	Approval			
Consent	Plumbing - Sewer	Approval			
Certificate	Footing Inspection	Final			
Certificate	Slab Inspection	Final			
Certificate	Termite Management System	Final			
Certificate	Timber Truss / Frame Design	Final			

To add a new check, via the *Check* form, click the *Add* button.

To open the check once created, simply double click on the check record.

To delete an existing check, click the *Delete* button.

The *SFS (Special Fire Services)* button (visible only after the *Special Fire Services* consent check is added) is used to open the *Special Fire Services* form.

To print a checks report for each category of checks use the *Consents*, *Certificates* and *Assessments* buttons.

Hint

Consider using the check reports as an appendix to your generated letters to notify the applicant of any required consents and/or certificates required for the application.

These reports will also include the check comments which can be used to record any referral agency comments/conditions.

The *Insert* button is used to open the *Insert Checks* form from which multiple checks can be added using a predefined check group.

The *Check Category* field categorises each check as one of the following:

- Consent – these checks are used to record any referral agency consents or approvals which are required for the proposed building work

- Certificate – these checks are used to record any design, inspection or aspect certificates which are required for the proposed building work
- Assessment – these checks are used to record the key checks undertaken in assessing the application

The *Prerequisite For* field allows you to define whether the check is required to be completed prior to approving the application or passing the application's final inspection. When set to *Approval* the application cannot be approved until the check's *Completed Date* value is entered. When set to *Final* the application cannot be finalized until the check's *Completed Date* value is entered.

While the *Check Type* list of values contains a useful default set of check types, you can easily add your own check type codes using the *Codes* form.

Note

All Consent and Assessment category checks will default to the Approval prerequisite (except for the Plumbing - Sewer check type).

All Certificate category checks will default to the Final prerequisite.

When the Special Fire Services check type is selected the Special Fire Services command button is enabled.

*All mandatory fields are highlighted by a **bolded** field label or CAPITALISED column label. Mandatory fields must contain a valid value before any changes can be saved.*

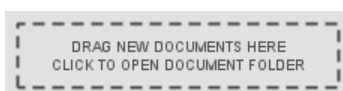
Documents Tab

The *Documents* tab is used to link external files to the application by either importing files (e.g. photos, document, scanned plans etc) or generating Microsoft Word merge letters. Documents can be sorted by either date added (1-31) or by document type and description (A-Z).

DATE	DOCUMENT TYPE	Description	File Type	Archive CD/DVI
3/06/2016	Generated Letter	Fee Quotation	Microsoft Word 97 - 2003	
3/06/2016	Generated Letter	Notice of Engagement	Microsoft Word 97 - 2003	

To import a new document, click the *Add* button. Once the document is imported you should enter a meaningful document description as the description is used to help you identify the document when viewed within BC Office.

You can also import new documents by dragging and dropping the document files from Windows Explorer onto the *Application* form's drop zone or by placing the document files directly in the application's document archive folder (requires the *Document folder monitoring* preference to be enabled).



Note

When importing a file, a copy of the file will be taken and stored in the BC Office document archive leaving the original file untouched. BC Office references the copied version of the file allowing you to remove the original file if desired.

You should never rename or remove files directly from the BC Office document archive.

To generate a new Microsoft Word merge letter, click on the *Letters* command button. While BC Office contains a comprehensive set of merge templates, based on the Queensland building regulations, you can easily add your own merge templates using the *Merge Templates* form.

To open the document once linked, simply double click on the document record.

To delete an existing document, click the *Delete* button.

Note

As generated merge letters are automatically linked to the application their Document Type cannot be changed.

*All mandatory fields are highlighted by a **bolded** field label or CAPITALISED column label. Mandatory fields must contain a valid value before any changes can be saved.*

Fees Tab

The *Fees* tab allows you to record any fees which have been quoted, unpaid or paid for the application.

FEE STATUS	FEE TYPE	FEE AMOUNT	Date Paid	Included Hour	Included Insp	Reference	Comments
Paid	Application Fee	\$450.00	3/06/2016	10			
Quote	Inspection Fee	\$300.00			3		
Total		\$750.00		10	3		

To add a new fee, click the *Add* button.

To delete an existing Fee, click the *Delete* button.

The *Quote Reference* field can be used to record your formal quote reference number if a quote has been issued. This field along with all *Quote* fees will be used on the *Fee Quotation* merge letter.

The *Included Hours* and *Included Inspections* fields are used to record the number of hours and/or inspections which have been quoted, unpaid or paid for the application. This information is then used by the *Fee Credit/Debit Application Register* report. The *Reference* field can optionally be used to record the fee's receipt/tax invoice number, issued by your financial application.

While the *Fee Type* list of values contains a number of common fee types, you can easily add your own fee type codes using the *Codes* form.

Note

*The hours and inspection fee status information, located beneath the **Certified By** field, provides a quick update on the application’s number of paid hours/inspections and completed (fee required) hours/inspections.*

*The **Fee Credit/Debit Application Register** report can be used to obtain a list of all applications which have had more completed (fee required) hours/inspections than paid hours/inspections.*

*All mandatory fields are highlighted by a **bolded** field label or CAPITALISED column label. Mandatory fields must contain a valid value before any changes can be saved.*

Hours Tab

The *Hours* tab records all hours worked on the application.

Contact NamesBuilding WorkChecksDocumentsFeesHoursInspectionsAction NotesAdditional Information

AddDelete

DATE	WORK TYPE	CERTIFIER	HOURS	Comments	No Fee Required
3/06/2016	Plan Approval	John Rosze	8		<input type="checkbox"/>
*					<input type="checkbox"/>
Total			8		

Record: 1 of 1No FilterSearch

To add new hours worked, click the *Add* button.

To delete existing hours worked, click the *Delete* button.

The *No Fee Required* option allows the current hours worked to be excluded from the *Fee Credit/Debit Application Register* report.

Note

The hours and inspection fee status information, located beneath the Certified By field, provides a quick update on the application's number of paid hours/inspections and completed (fee required) hours/inspections.

The Hours Worked Report can be used to track the total number of hours worked per application and/or certifier within the selected reporting period.

The Fee Credit/Debit Application Register report can be used to obtain a list of all applications which have had more completed (fee required) hours/inspections than paid hours/inspections.

*All mandatory fields are highlighted by a **bolded** field label or CAPITALISED column label. Mandatory fields must contain a valid value before any changes can be saved.*

Inspections Tab

The *Inspections* tab records all inspections undertaken on the building work during construction. Both inspections conducted by the Building Certifier and by other competent persons (i.e. engineers etc) can be recorded here.

Date	Time	Certificate Date	Inspection Type	Certifier	Result	No Fee Required
3/06/2016	08:30 AM		Scheduled - Slab		Scheduled Inspection	<input type="checkbox"/>
2/06/2016			Foundation	John Rosze	Satisfactory	<input type="checkbox"/>

To add a new inspection, via the *Inspection* form, click the *Add* button.

To open the inspection once created, simply double click on the inspection record.

To delete an existing inspection, click the *Delete* button.

The *No Fee Required* option allows the current inspection to be excluded from the *Fee Credit/Debit Application Register* report.

Note

When a Satisfactory Final inspection is entered the application Status will be set to Finaled.

Action Notes Tab

The *Action Notes* tab allows you to record any additional notes against the application. These notes can be a record of a telephone conversation or meeting and may include a file attachment.

Date Recorded	Action	Subject
3/06/2016 6:06:19 PM	File Note	Plans will be picked up by the owner

Record: 1 of 1 | No Filter | Search

To add a new action note, via the *Action Note* form, click the *Add* button.

To open the action note once created, simply double click on the action note record.

To delete an existing action note, click the *Delete* button.

Additional Information Tab

The *Additional Information* tab allows you to record any additional miscellaneous information against the application.

INFORMATION	VALUE
*	

Record: | No Filter | Search

To add new additional information, click the *Add* button.

To delete existing additional information, click the *Delete* button.

You can easily add your own additional information codes using the *Codes* form.

This feature allows you to define your own extra information fields, in order to extend the information which can be recorded against the application. You can then later report on applications which are assigned these extra fields, using the *Additional Information Reporting* form.

Using the Select Contact form

The *Select Contact* form is used to add contact relationships to the application. Using this form you can search the *Address Book* for the required contact and, if needed, you can add a new contact to the *Address Book* before adding the relationship to the application.

Name	Organisation	Mobile	Phone
Brisbane City Council	Brisbane City Council		
John Rosze	Rosze Certification	0433 337 890	07 3333 7890
Rosze Pty Ltd	Rosze Pty Ltd		0439 337 870

To add a new contact relationship, follow these simple steps:

1. From the *Application* form's *Contact Names* tab, click on the *Add* button.
2. On the *Select Contact* form, select the *Relationship* type for this contact.
3. Using the search criteria perform a search for this contact.
4. If the contact is not in the *Address Book*, click the *New* command button and follow the usual steps to create the new contact using the *Address Book Contact* form. Once the contact is entered perform the search again to find the contact.
5. Highlight the contact entry and click the *Select* command button to create the contact relationship and return to the *Application* form.

If the owner or builder is also the applicant you can create all relationships at once, by selecting one of the multi-relationship types in Step 2 above. In the above screenshot, the applicant is also the owner and both relationships are being created by selecting the *Applicant & Owner Relationship* type.

Note

If you can't find an existing contact for the selected relationship make sure the contact is a member of the associated group. To add the contact to the group, use the Address Book form to locate the contact (under the ALL CONTACTS group) and edit the contact's group details.

If you create a second owner, applicant or builder relationship the existing relationship will be updated to the Owner (Previous), Applicant (Previous) or Builder (Previous) relationship. All merge documents will be generated using the current relationship details only.

Using the Check form

The *Check* form is used to add and maintain checks on the application. Using these checks you can create a customised checklist for each application. You can also prevent the application from being approved or finalised until all required prerequisite checks have been completed.

The screenshot shows a web form titled 'Check - DA 20160001'. At the top, there are 'SAVE' and 'DELETE' buttons. Below these are three dropdown menus: 'Check Category' (set to 'Consent'), 'Check Type' (set to 'Plumbing - Sewer'), and 'Prerequisite For' (set to 'Approval'). To the right of these are three text input fields: 'Start Date', 'Complete Date', and 'Reference'. A large empty text area is at the bottom of the form.

The *Check Category* field categorises each check as one of the following:

- Consent – these checks are used to record any referral agency consents or approvals which are required for the proposed building work
- Certificate – these checks are used to record any design, inspection or aspect certificates which are required for the proposed building work
- Assessment – these checks are used to record the key checks undertaken in assessing the application

The *Prerequisite For* field allows you to define whether the check is required to be completed prior to approving the application or passing the application's final inspection. When set to *Approval* the application cannot be approved until the check's *Completed Date* value is entered. When set to *Final* the application cannot be finalised until the check's *Completed Date* value is entered.

While the *Check Type* list of values contains a useful default set of check types, you can easily add your own check type codes using the *Codes* form.

Note

All Consent and Assessment category checks will default to the Approval prerequisite (except for the Plumbing - Sewer check type).

All Certificate category checks will default to the Final prerequisite.

*All mandatory fields are highlighted by a **bolded** field label or CAPITALISED column label. Mandatory fields must contain a valid value before any changes can be saved.*

Using the Insert Checks form

The *Insert Checks* form allows you to add multiple checks using predefined check groups.

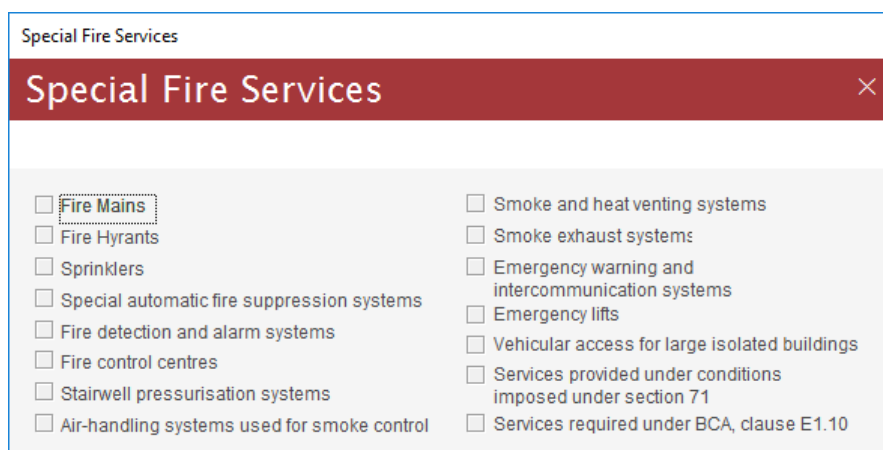
To add new checks, follow these simple steps:

1. Select the required *Check Group*.
2. Review the checks which will be inserted to confirm you wish to proceed. Only additional checks which have not already been added to the application will be inserted.
3. Click the *Insert Checks* command button to add each of the checks and return to the *Application* form.

Check Groups are fully customisable, using the *Preferences* form, and can be used to create comprehensive checklist templates.

Using the Special Fire Services form

The *Special Fire Services* form is used to record any Special Fire Services which may be required to be assessed by the referral agency (e.g. the *Queensland Fire and Emergency Services*).



Special Fire Services

☐ Fire Mains

☐ Fire Hydrants

☐ Sprinklers

☐ Special automatic fire suppression systems

☐ Fire detection and alarm systems

☐ Fire control centres

☐ Stairwell pressurisation systems

☐ Air-handling systems used for smoke control

☐ Smoke and heat venting systems

☐ Smoke exhaust systems

☐ Emergency warning and intercommunication systems


☐ Emergency lifts

☐ Vehicular access for large isolated buildings

☐ Services provided under conditions imposed under section 71

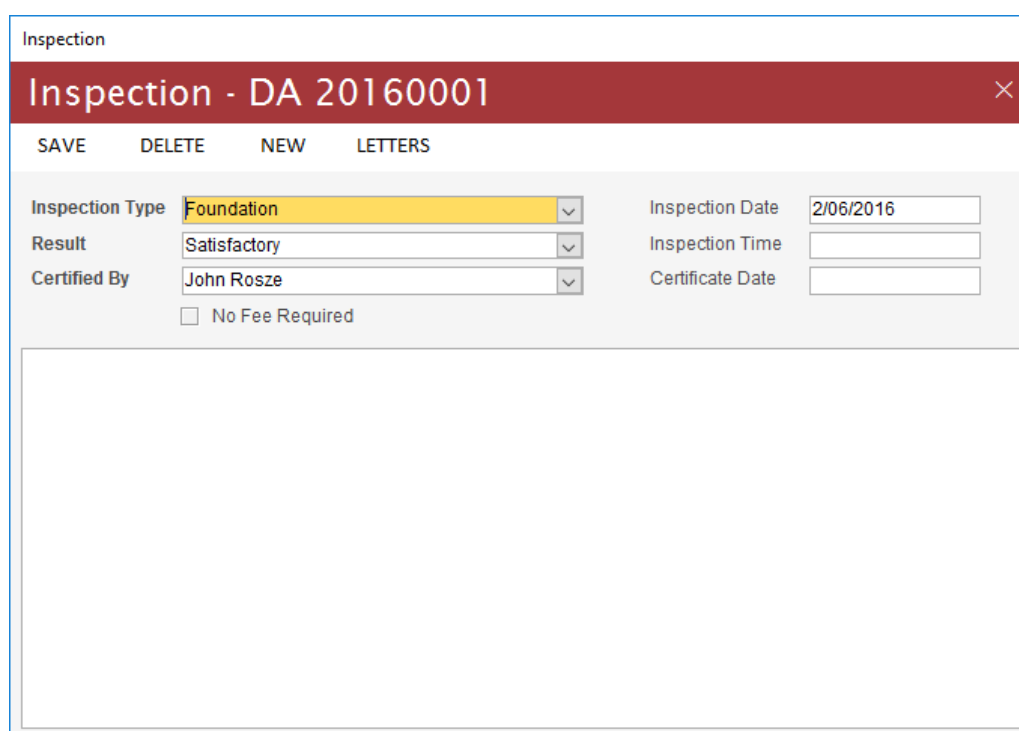
☐ Services required under BCA, clause E1.10

Note

To open the *Special Fire Services* form you must first add the *Special Fire Services* consent check type to the application then click on the *Special Fire Services*  button on the *Checks* tab.

Using the Inspection form

The *Inspection* form is used to add and maintain inspections undertaken on the application's building works.



Inspection

Inspection - DA 20160001

SAVE DELETE NEW LETTERS

Inspection Type: Foundation

Result: Satisfactory

Certified By: John Rosze

Inspection Date: 2/06/2016

Inspection Time:

Certificate Date:

☐ No Fee Required

While the *Inspection Type* and *Result* list of values contains most of the inspection types and results you are likely to need, you can easily add your own inspection type and result codes using the *Codes* form.

The *No Fee Required* option allows the current inspection to be excluded from the *Fee Credit/Debit Application Register* report.

Note

When adding a new inspection, a value for one of the Inspection Date or Certificate Date (e.g. date of the engineer's certificate) fields must be entered.

You cannot enter a Final inspection unless the application has first been approved and all prerequisite checks have been completed.

When a Satisfactory Final inspection is entered the application Status will be set to Finaled.

All mandatory fields are highlighted by a **bolded** field label or CAPITALISED column label.

Mandatory fields must contain a valid value before any changes can be saved.

Using the Action Note form

The *Action Notes* form allows you to add and maintain action notes. These notes can be a record of a telephone conversation, a meeting or any other action which may have occurred which relates to the application.

The screenshot shows the 'Action Note' form for application 'DA 20160001'. The form has a title bar with a close button. Below the title bar are buttons for 'SAVE', 'DELETE', 'SHOW FILE', and 'LINK FILE'. The form fields are as follows:

- Action:** A dropdown menu with 'File Note' selected.
- Subject:** A text field containing 'Plans will be picked up by the owner'.
- Recorded By:** A text field containing 'Gavin'.
- Date Recorded:** A text field containing '03/06/2016 6:06 PM'.
- File Attachment:** A text field.

Below the fields is a large text area for notes. At the bottom is an 'OPTIONS' section with two checkboxes:

- ☐ Create an alert message for this action note
- ☐ Create a reminder for this action note

Next to the second checkbox is a 'Reminder Date' text field.

The *Create an alert message* option allows you to create an alert message which will be displayed to each user on opening of the *Application* form. Alert messages allow you to notify the user of any important information they should know about when dealing with this application.

The above *Action Note* screenshot will produce the following alert message for each user viewing the application. To deactivate an alert message, simply unselect the *Create an alert message* option on the *Action Note* form.

The screenshot shows an 'Action Note Alert' dialog box. It has a title bar with a close button. Inside the dialog box, there is a yellow warning triangle icon. To the right of the icon is the text 'Plans will be picked up by owner'. Below this text is a line of smaller text: '[To disable this alert unselect the Action Note's Alert Message option]'. At the bottom right of the dialog box is an 'OK' button.

The *Create a reminder* option allows the current action note to be defined as a reminder. Upcoming reminders are shown on the Dashboard. If any reminders are due today, an alert message will be displayed to each user when opening BC Office. To deactivate a reminder, simply unselect the *Create a reminder* option on the *Action Note* form.

You can also create a link to an external file using the *Link File* command button. To open the file once linked click on the *Show File* command button.

While the *Action* list of values contains most of the actions you are likely to need, you can easily add your own action codes using the *Codes* form.

Note

Linked files on the Action Note form are not imported into the BC Office document archive. These files will be referenced from their current location.

When opening the linked file, the system will use your Microsoft Windows file association settings to locate the file's application.

*All mandatory fields are highlighted by a **bolded** field label or CAPITALISED column label. Mandatory fields must contain a valid value before any changes can be saved.*

Using the Letter Merge form

The *Letter Merge* form is used to perform a letter merge in Microsoft Word. The *Letter Merge* form can be opened by clicking on the *Letters* command button on the *Application* form.

The screenshot shows the 'Letter Merge' form with a red header bar. Below the header is a 'RUN MERGE' button. The form is divided into two main sections: 'Step 1 - Select a merge template' and 'Step 2 - Optionally select the additional text to be inserted into the letter'.

MERGE TEMPLATES	INSERT TEXT
Assessment Checks	Conditions - Class 10a
Certificate of Classification	Conditions - Class 1a
Compliance Certificate for Building Design	
Decision Notice Approval	
Decision Notice Approval With Conditions	
Decision Notice Refusal	
Fee Quotation	
Fee Summary (Unpaid & Paid)	
Final Inspection Certificate (Class 1a and 10)	
Final Inspection Certificate (Swimming Pool)	
Final Inspection Outstanding Items	
Information Request	
Lodgement of Building Work Documentation	
Notice of Discontinuance of Engagement	
Notice of Engagement	
Relevant Information For Service Providers	
Reminder Notice of Lapsing Approval	
Reminder Notice of Lapsing Information Request	
Request for Building Information	
Required Consents & Certificates	
Standard Letter	

Below the 'INSERT TEXT' section, there is a preview of the selected template, 'CLASS 10A GARAGES, CARPORTS & OTHER NON HABITABLE'. The preview shows the following text:

CLASS 10A GARAGES, CARPORTS & OTHER NON HABITABLE

1. Compliance with the *Building Act 1975* as amended and all other r
Compliance with all amendments and endorsements noted in red on ap

NOTICE OF INSPECTIONS

Notification must be given to the Private Certifier twenty four (24) hours prior

To generate a new Microsoft Word merge letter, you can double click on the required merge template or highlight the required merge template and click on the *Run Merge* command button.

While the list of available merge templates contains most of the templates you will need, you can easily add your own merge templates using the *Merge Templates* form. The *Merge Templates* form is also used to create and maintain the *Insert Text* values.

The *Send Email* form is used to send an email using your local Microsoft Outlook client. The *Send Email* form can be opened by clicking on the *Email* command button on the *Application* form.

To preview the Microsoft Outlook email, you can optionally select one or more application contacts and document attachments and click on the *Preview* command button.

Only application contacts with a current email address will be shown in the contact list. If you don't select a contact, you will need to enter the recipient email address directly using Microsoft Outlook once the email has been previewed.

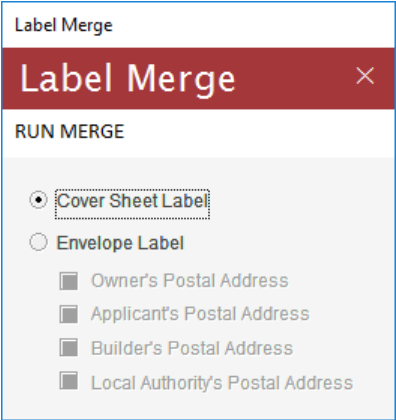
Note

You must have a configured Microsoft Outlook client installed in order to send emails from BC Office.

The Email command button on the Address Book and Calendar forms will open the Microsoft Outlook email preview directly.

Using the Label Merge form

The *Label Merge* form is used to perform a label merge in Microsoft Word. The *Label Merge* form can be opened by clicking on the *Labels* command button, on the *Find Application* form.

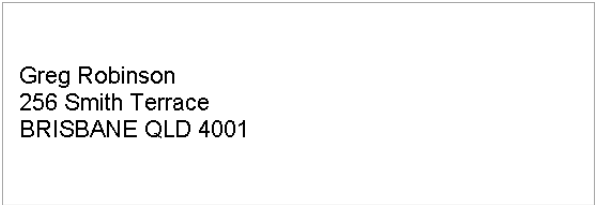


To print a set of labels, use the *Find Application* form to select one or more applications to be used for the label merge, then open the *Label Merge* form, select the required *Label Type* and click on the *Run Merge* command button to generate the label merge.

The *Cover Sheet Label* merge will generate a set of labels, similar to the following, which can be used to stick on the front cover of the application folder.



The *Envelope Label* merge will generate a set of labels, similar to the following, which can be used as envelope labels.



PLAN REGISTER

BC Office provides the *Plan Register* for recording all of your scanned Survey Plans. These plans can then be linked to your applications to allow quick and easy access to the scanned Survey Plans, directly from the *Application* form. The register is maintained using the *Plan Register* form.

Using the Plan Register form

The Plan Register form is used to add and maintain Survey Plan register entries.

The screenshot shows the 'Plan Register' form with a title bar and a close button. Below the title bar are buttons for 'SAVE', 'NEW', 'DELETE', 'PRINT', and 'SHOW PLAN'. The form contains two input fields: 'Plan Type' (a dropdown menu) and 'Plan' (a text box). Below these is a table with the following columns: PLAN TYPE, PLAN, FROM LOT, TO LOT, and FILENAME. The table contains 20 rows of data. The first row is highlighted in blue. At the bottom of the table is a status bar showing 'Record: 1 of 3927', 'Unfiltered', and a search box.

PLAN TYPE	PLAN	FROM LOT	TO LOT	FILENAME
SP	100340	51	56	SP160340-2-3.TIF
SP	100884	5	8	SP100884.TIF
SP	100886	1	4	SP100886.TIF
SP	101523	44	48	SP101523.TIF
SP	101524	1	2	SP101524.TIF
SP	101524	35	35	SP101524.TIF
SP	101524	42	52	SP101524.TIF
SP	101524	61	65	SP101524.TIF
SP	101524	300	304	SP101524.tif
SP	101527	6	6	SP101527.TIF
SP	101527	511	512	SP160936.TIF
SP	101530	1	3	SP101530.TIF
SP	101531	24	24	SP101531.TIF
SP	101531	201	202	SP101531.tif
SP	101668	2	6	SP101668.TIF
SP	101780	6	6	sp101780.tif
SP	101780	21	21	sp101780.tif
SP	101780	23	23	sp101780.tif
SP	101780	25	25	sp101780.tif

Record: 1 of 3927 Unfiltered Search

The *Show Plan* command button is used to open the highlighted Survey Plan. Use the *Print* command button to print the *Plan Register* report. To search for an existing Survey Plan, use the *Search* fields.

To register a new Survey Plan, follow these simple steps:

1. Using your favourite scanning application, scan the Survey Plan and save the file into the BC Office *Plan Register* subfolder.
2. On the *Plan Register* form, click the *New* command button.
3. Select the *Plan Type* and enter the *Plan Number*.
4. Enter the range of Lots covered by the plan (e.g. from Lot 1 to Lot 17). If the Survey Plan contains multiple Lot ranges (i.e. due to the Lots not being continuous) a separate entry will be required for each range (e.g. in the above screenshot SP101527 required 2 entries).
5. Enter the filename for the scanned Survey Plan or double-click anywhere in new record to browse for the scanned image file (which must be located in the BC Office *Plan Register* subfolder).
6. Click the *Save* command button to save the new entry.

Once the Survey Plan is registered, any application which records a Lot/Plan, using the *RPD fields*, which fall within one of the registered Lot/Plan ranges will automatically be linked to the Survey Plan.

To delete an existing Survey Plan entry, click the *Delete* command button. Removing the Survey Plan entry will not remove the scanned image file from BC Office *Plan Register* subfolder.

While the *Plan Type* list of values contains most of the plan types you are likely to encounter, you can easily add your own plan type codes using the *Codes* form.

Note

To be entered in the Plan Register, all scanned Survey Plan image files must be located in the BC Office Plan Register subfolder.

When opening the Survey Plan image file, the system will use your Microsoft Windows file association settings to locate the file's application.

SIGHTING CLAIMS

Under legislation, Building Certifiers may be charged with verifying that required Owner Builder permits have been obtained and that insurance/levy payments have been made prior to approving the application, for which the certifier may claim a nominal sighting fee. This is often achieved by simply sighting the permit or payment receipt. BC Office supports the recording and claiming of the following sightings, using the *Sighting Claims* form:

- QBCC Owner Builder permits
- QBCC Insurance receipts
- QLeave Levy receipts

To indicate that the application requires one or more of these sightings, you must tick the appropriate checkbox on the *Building Work* tab of the *Application* form, as shown in the following screenshot.

The screenshot shows the 'Building Work' tab of the 'Application' form. It includes a table with columns: STRUCTURE TYPE, CLASSIFICATION, Floor Area, and Storeys. The first row shows 'Dwelling', 'Class 1A', '300', and '1'. Below the table, there are checkboxes for 'Owner Builder', 'QBCC Permit Required', 'QBCC Insurance Required', and 'QLeave Levy Required'. The 'Cost of Building Work' is set to '\$250,000.00' and the 'Local Authority Building DA Reference' is empty.

Using the Sighting Claims form

The *Sighting Claims* form is used to record all permit and receipt sighting details and for claiming sighting reimbursements.

The screenshot shows the 'Sighting Claims' form. It has a 'Sighting Type' dropdown set to 'QBCC Insurance Receipt Sightings'. The 'CLAIM STATUS' section has 'Unclaimed' selected. Below is a table with columns: DA Number, Sighted Date, Receipt Date, Applicant Name, Reference Number, and Claimed Date. The first row shows '20160001', '3/06/2016', '3/06/2016', 'Rosze Pty Ltd', '12234', and an empty 'Claimed Date'.

The *Process Claim* command button can be used to process a sighting claim for the selected *Sighting Type*.

The *Show* command button is used to open the *Application* form on the highlighted application.

The *Claim Status* field allows you to view *Unclaimed* or *Claimed* sightings (claimed sightings are read only).

When entering the sighting details, the *Applicant/Owner Name* list of values will show all current contact relationships for the selected application. If the applicant/owner is not in the application's contacts, you can manually enter the name in the *Applicant/Owner Name* field.

To periodically claim a sighting reimbursement, follow these simple steps:

1. Ensure all sighting details for the claim period have been completed.

- Click on the *Process Claim* command button to commence the claim process.
- When prompted enter the claim period end date (as shown in the following screenshot). All completed and unclaimed sightings up to and including this date will be included in the current claim.

- Once you have confirmed the claim details, the claim form will be generated using the respective merge template and the *Claimed Date* field will be updated with the current date.
- After the claim form has been generated you will be prompted to complete the form's details by editing, using Microsoft Word, the generated document's header and footer sections.

- Once all changes have been made to the claim form you can save and print the final document for submission to the respective agency.

Once the claim has been processed, a link to the generated document will be included on each application's *Documents* tab.

If you process a sighting claim in error and need to reverse the claim, you can delete the claim document, from the *Application form's Documents* tab, for one of the included applications. This will remove the document from each included application and will also clear the *Claimed Date* on each sighting record.

Note

You must tick the relevant checkbox on the Application form's Building Work tab, before the application will be visible on the Sighting Claims form.

Only completed sightings which have been sighted within the claim period will be included in the generated claim.

*All mandatory fields are highlighted by a **bolded** field label or CAPITALISED column label. Mandatory fields must contain a valid value before any changes can be saved.*

Customising the Sighting Claim templates

Using the *Merge Templates* form you can create your own copy of the default claim forms, which you can then customise to meet your business requirements.

When creating your own claim templates the following template requirements will apply:

- The template *Type* must be either *QBCC OB Claim*, *QBCC Claim* or *QLeave Claim*.

BULK MERGE

For those times when you need to generate the same merge letter for a batch of applications, BC Office provides the Bulk Merge feature. Using the *Bulk Merge* form you can create a single merge document, from a customisable template, containing a letter for each application which satisfies a predefined requirement.

Currently only the following bulk merge letter(s) are supported:

- *Reminder Notice of Lapsing Approval* – This bulk merge will generate a reminder notice for each lapsing application, using the reminder period settings defined on the *Preferences* form.
- *Reminder Notice of Lapsing Information Request*– This bulk merge will generate a reminder notice for each lapsing information request, using the reminder period settings defined on the *Preferences* form.

Using the Bulk Merge form

The *Bulk Merge* form is used to select the bulk merge template and to preview the applications which will be included in the bulk merge.

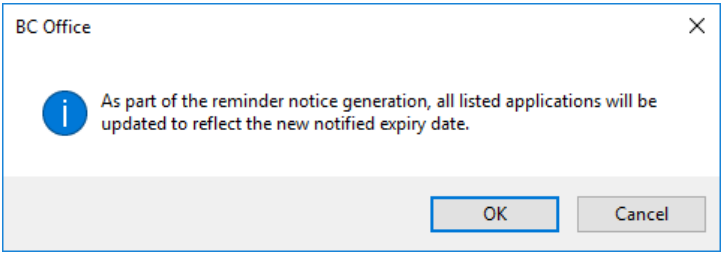
The *Run Merge* command button is used to commence the bulk merge.

The *Show* command button is used to open the *Application* form on the highlighted application.

The *Print* command button can be used to print a register report of the included applications, prior to commencing the bulk merge.

To generate a new bulk merge, follow these steps:

1. Select the required *Bulk Merge Template* from the available templates. All applications which satisfy the template’s data source query will then be shown in the result list.
2. If desired, click on the *Print* command button to print a register report of all applications which will be included in the bulk merge.
3. Click on the *Run Merge* command button to commence the bulk merge.
4. Depending on the bulk merge chosen you may receive a confirmation notification similar to the following. Click on the *OK* button to confirm the bulk merge.



5. Once the bulk merge document has been generated, you can edit the final document to make any required changes before saving and printing.

On completion of the bulk merge process, a link to the generated document will be included on each application’s *Documents* tab.

If you process a bulk merge in error, you can delete the bulk merge document, from the *Application* form's *Documents* tab, for one of the included applications. This will remove the document from each included application.

Note

Once the bulk merge document has been generated, the application will be excluded from future bulk merge runs to prevent duplication. For this reason, if you want to print the register report you should print the report before generating the bulk merge document.

Any updates made to the application (e.g. updating the application's Expires On date as part of the Reminder Notice of Lapsing Approval bulk merge) cannot be undone by removing the bulk merge document.

Customising the Reminder Notice bulk merges

The *Options* tab on the *Preferences* form is used to control the reminder notice preferences. Using the *Preferences* form, you can modify the default options (shown below) to customise the behaviour of the reminder notice data source query.

The *DA Expiry* options are:

- *Expiry Period* – When an application is approved, the *Expires On* date will default to the *Approved On* date plus the number of months set for the *Expiry Period*.
- *Reminder Period* – This preference is used to define the reminder period in which a reminder notice should be sent (see below).
- *Grace Period* – When issuing a reminder notice, the *Notified Expiry Date* will be the greater of the current *Expires On* date and the bulk merge date plus the number of the months defined by the *Grace Period*. This will ensure that the client is provided the minimum required reminder notification before the application expires. If the *Expires On* date falls within the *Grace Period*, then the *Expires On* date will be updated, by the bulk merge process, to the *Notified Expiry Date*.
- *Starting DA Number* – This preference allows you to set the *DA Number* from which the reminder notice requirements will apply (see below).
- *Information Request Period* – The number of months from issuing of the Information Request merge letter in which the applicant must respond.
- *Information Request Reminder Period* – This preference is used to define the reminder period (in months) in which an information request reminder notice should be sent.

Preferences

SAVE UPDATE LICENCE VALIDATE DA STATUS RESET DA NUMBER CLEAR LOGINS

Profile Options Calendar Check Groups Logins

APPLICATION

Show Application Window Normal

Autosave Changes No

☒ Document folder monitoring

LETTER MERGE

Show Insert Text Preview Yes

DASHBOARD REMINDERS

☒ Action Note Reminders Due Within 7 Days

☒ DAs Due To Expire Within 7 Days

☒ DAs Unapproved After 28 Days

DA EXPIRY

Expiry Period (Months) 24

Reminder Period (Months) 4

Grace Period (Months) 3

Starting DA Number 20160001

DA DEFAULT FEE RATES

Hourly Fee Rate \$120.00

Inspection Fee Rate \$85.00

The *Reminder Notice of Lapsing Approval* bulk merge will generate a reminder notice for each application which satisfies the following requirements:

- The application's *DA Number* is equal to or greater than the *Starting DA Number* preference.
- The application *Status* is either *Approved* or *Expired*.
- The *Expires On* date falls within the reminder period as defined by the *Reminder Period* preference (e.g. if the preference is set to 4 months (the default), then the application must expire within the next 4 months).
- A reminder notice must not have already been sent for the application.

The *Reminder Notice of Lapsing Information Request* bulk merge will generate a reminder notice for each application which satisfies the following requirements:

- The application *Status* is *Information*.
- The date of the *Information Request* letter generation plus the request period less the reminder period, as defined by the *Information Request Period* and *Reminder Period* preferences, must have past (e.g. if the information request period is set to 6 months and the reminder period is set to 1 month (the default preferences), then the information request letter must have been generated more than 5 months ago).
- A reminder notice must not have already been sent for the application.

REPORTING

BC Office provides a range of detail and register style reports, which are designed to help you process and monitor your applications, appointments, hours worked, fees and related information.

The *Reports* menu, on the BC Office menu ribbon, contains the following reporting options:

- *Current Unapproved Application Report* – Register report listing all current and unapproved applications.
- *Expired and Unfinalised Applications Report* – Register report listing all expired applications.
- *Hours Worked Report* – Work performance report showing all hours worked within the reporting period.
- *Fee Report* – Register report listing the all quoted, unpaid and paid fees, including credit/debit balance of the application's including hours and inspections.
- *Addition Information Report* – Register report listing all applications, and their *Additional Information* values, which match the reporting criteria.
- *Processing Time Report* – Register report listing all applications, and their processing times, which match the reporting criteria.

In addition, the following reports are available from various forms:

- *Calendar Appointments Report* – Detail report detailing all current and available appointment times for the current *Calendar* view (available from the *Calendar* form).
- *Application Details Report* – Detail report detailing all information relating to the current application (available from the *Application* form).
- *Application Register Report* – Register report listing all applications which match the reporting criteria (available from the *Find Application* form).
- *Reminder Notice Report* – Register report listing all applications which are due to be issued a reminder notice (available from the *Bulk Merge* form when performing a reminder notice merge).
- *Plan Register Report* – Register report listing all Survey Plans in the *Plan Register* (available from the *Plan Register* form).

Each report will be generated as an Adobe Acrobat PDF which can be saved or printed using Adobe Acrobat Reader.

Note

Adobe Acrobat Reader must be installed on each client PC to view the generated PDFs.

Using the Hours Worked Report form

The *Hours Worked Report* form is used to show all hours worked within the selected reporting period by application. Hours worked are entered on the *Hours* tab of the *Application* form.

Either a weekly or yearly reporting period can be selected. The hours worked can also be filtered by certifier to provide a simple work load performance report.

The *Clear* command button can be used to clear the current search results and criteria, in preparation for performing another search.

The *Export* command button exports the search results to Microsoft Excel.

Hours Worked Report ×

SEARCH CLEAR SHOW EXPORT

Report Type Yearly Report Year Containing 3/06/2016

Certifier

DA Number	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	TOTAL
20140001	0	0	0	2	0	0	0	0	0	0	0	0	2
Total	0	0	0	2	0	0	0	0	0	0	0	0	2

Using the Fee Report form

The *Fee Report* form is used to show a summary for all application and inspection fees. The fee details, along with the number of included hours and inspections, are entered on the *Fees* tab of the *Application* form.

The Report Type field can be used to produce the following types of reports:

- *All Fees* – shows only applications which have a fee recorded on the fees tab.
- *All Quote Fees* – shows only applications which have a quote fee recorded on the fees tab.
- *All Unpaid Fees* – shows only applications which have an unpaid fee recorded on the fees tab.
- *All Paid Fees* – shows only applications which have a paid fee recorded on the fees tab.
- *All Credits / Debits* – shows only applications which have a positive and/or negative balance in paid hours and/or inspections.
- *All Credits Hours* – shows only applications which have a positive balance in paid hours.
- *All Credits Inspections* – shows only applications which have a positive balance in paid inspections.
- *All Debit Hours* – shows only applications which have a negative balance in paid hours.
- *All Debit Inspections* – shows only applications which have a negative balance in paid inspections.
- *All Applications* - shows all applications along with their balances.

Fee Report ×

SEARCH CLEAR SHOW PRINT PRINT CR/DR EXPORT

DA Number To Contact Name

Lodged Date To Certified By

Approved Date To Status <Current Applications>

Report Type All Fees Structure Type

Classification

DA Number	Lodged Date	Site Address	Applicant	Status	Total Fees	Quote Fees	Unpaid Fee	Paid Fees	Hours	Inspection
20160001	3/06/2016	100 George Street, BRISB#	Rosze Pty Ltd	Lodged	\$750.00	\$300.00		\$450.00	2	2

The *Clear* command button can be used to clear the current search results and criteria, in preparation for performing another search.

The *Show* command button is used to open the *Application* form on the highlighted application. You can also open the *Application* form by double clicking the application record.

The *Print* command button opens the *Fee Summary Application Register* report showing all search results.

The *Print CR/DR* command button opens the *Fee Credit/Debit Application Register* report showing all search results.

The *Export* command button exports the search results to Microsoft Excel.

Search Hints

1. When entering values in the *DA Number* criteria fields, the values must be numeric.

- To specify a list of applications to search for, you can enter a comma separated list of values in the *DA Number* criteria fields.
- By default, the form will search for current applications only. To search through all applications, change the *Status* search criteria to *All Applications*.

Note

All hours worked and inspections undertaken are calculated from the Hours and Inspections tabs on the Application form. All No Fee Required hours and inspections are excluded from the credit/debit balance calculations.

A positive balance indicates a credit and a negative balance indicates a debit (i.e. more fees are required to be paid).

Using the Additional Information Report form

The *Additional Information Report* form is used to find all applications which have a specific *Information* code or value assigned (via the *Additional Information* tab on the *Application* form).

The *Clear* command button can be used to clear the current search results and criteria, in preparation for performing another search.

The *Show* command button is used to open the *Application* form on the highlighted application. You can also open the *Application* form by double clicking the application record.

The *Print* command button opens the *Additional Information Application Register* report showing all search results.

The *Export* command button exports the search results to Microsoft Excel.

Search Hints

- When entering values in the *DA Number* criteria fields, the values must be numeric.
- To specify a list of applications to search for, you can enter a comma separated list of values in the *DA Number* criteria fields.
- When searching using the *Site Address*, choose a portion of the address which is not easily misspelt (i.e. this will help reduce spelling errors).
- By default, the form will search for current applications only. To search through all applications, change the *Status* search criteria to *All Applications*.

Using the Processing Time Report form

The *Processing Time Report* form is used to calculate the processing times (number of days between lodgement and approval) for all applications which match the reporting criteria.

The following *Report Types* are available:

- *Work Days Report* – Only work days will be used to calculate the processing time (i.e. Monday to Friday).
- *Total Days Report* – The processing time will be calculated in total days (i.e. Monday to Sunday).

By default, the form will calculate the processing time in work days for all current applications.

The *Clear* command button can be used to clear the current search results and criteria, in preparation for performing another search.

The *Show* command button is used to open the *Application* form on the highlighted application. You can also open the *Application* form by double clicking the application record.

The *Print* command button opens the *Processing Time Application Register* report showing all search results.

The *Export* command button exports the search results to Microsoft Excel.

Search Hints

1. When entering values in the *DA Number* criteria fields, the values must be numeric.
2. To specify a list of applications to search for, you can enter a comma separated list of values in the *DA Number* criteria fields.
3. When searching using the *Site Address*, choose a portion of the address which is not easily misspelt (i.e. this will help reduce spelling errors).
4. By default, the form will search for current applications only. To search through all applications, change the *Status* search criteria to *All Applications*.

SYSTEM ADMINISTRATION

While the BC Office default system settings should satisfy most of your requirements, a large number of these settings are customisable. This flexibility in customising the system settings allows you to setup BC Office to suit your particular environment.

The following forms, available from the *Administration* tab on the menu ribbon, are used to set your own system settings and preferences:

- *Merge Templates* – used to add and maintain merge templates
- *Document Archiving* – used to archive imported and generated documents
- *Codes* – used to add and maintain the items in the various list of values
- *Preferences* – used to set your profile details and BC Office preferences

Note

By customising these system settings, you could setup BC Office for environments other than the Queensland building certification environment.

Using the Codes form

The *Codes* form is used to add and maintain system codes. These system codes are then used to populate the various selection list of values (i.e. dropdown lists).

Codes are divided into two types of codes, *Default Codes* and *User Codes*. The following screenshot shows several custom user codes being added to the *Inspection Type* list of values.

Codes

SAVE NEW DELETE

Code Type: Attachment Type Codes

Default Codes (read only)

Description (Locked)	Code (Locked)	Order	Active
Generated Letter	MERGE	1	<input checked="" type="checkbox"/>
Letter	LETTER	2	<input checked="" type="checkbox"/>
Form	FORM	3	<input checked="" type="checkbox"/>
Building Plan	PLAN	4	<input checked="" type="checkbox"/>
Amended Building Plan	AMEND	5	<input checked="" type="checkbox"/>
Image/Photo	IMAGE	6	<input checked="" type="checkbox"/>
Miscellaneous	MISC	7	<input checked="" type="checkbox"/>
Bulk Generated Letter	BULK	8	<input checked="" type="checkbox"/>
Auto Import	IMPORT	9	<input checked="" type="checkbox"/>

Record: 1 of 9

User Codes (add your codes here)

DESCRIPTION	Order	Active
*		<input checked="" type="checkbox"/>

Default Codes

These codes come preconfigured with BC Office and are controlled by the system. Default codes cannot be changed with the exception of the *Order* and *Active* fields. The *Order* field may be used to change the order of the codes when used in list of values and the *Active* field may be used to deactivate a default code.

Some default codes have special purposes within BC Office, such as the *Inspection Type's Final* code which, when used by the *Inspection* form to record a *Satisfactory* final inspection, will trigger the system to update the application status to *Finalled*.

Note

If you deactivate a special default codes, the system may not behave as expected. If this occurs, you should reactivate the default code.

User Codes

User codes are codes which you can add and maintain. When used in a list of values, these codes will be combined with the active default codes allowing you to extend the list of available codes.

To add a new user code simply select the required *Code Type* and click the *New* command button. Then enter a new code *Description* in the *User Codes* section. An optional *Order* value may also be added.

To delete an existing user code, select the user code and click the *Delete* command button.

Note

When the default codes and user codes are combined the resulting list of values will be ordered by the Order field values. By changing the Order field values, you can alter the order of the list of values.

You cannot remove a user code which has been used (i.e. if you have used an Inspection Type user code on an Inspection you cannot delete that code).

To remove a used default or user code from the list of values you can deactivate the code by unticking the Active field.

Using the Merge Templates form

The *Merge Templates* form is used to add and maintain the merge templates (and any included insert text values) which are used during letter generation.

While BC Office provides a comprehensive set of default templates, based on the Queensland building certification requirements, you can easily add or copy and modify your own templates to suit your particular requirements.

There are two basic methods used to create a new merge template:

- *Creating a new merge template using the copy method* – this method is the easiest and involves using an existing template as the basis for the new template (this is the recommended method)
- *Creating a new merge template using Microsoft Word* – using this method you can create a new template from scratch using Microsoft Word

Merge templates are divided into two types of templates, *Default Templates* and *User Templates*.

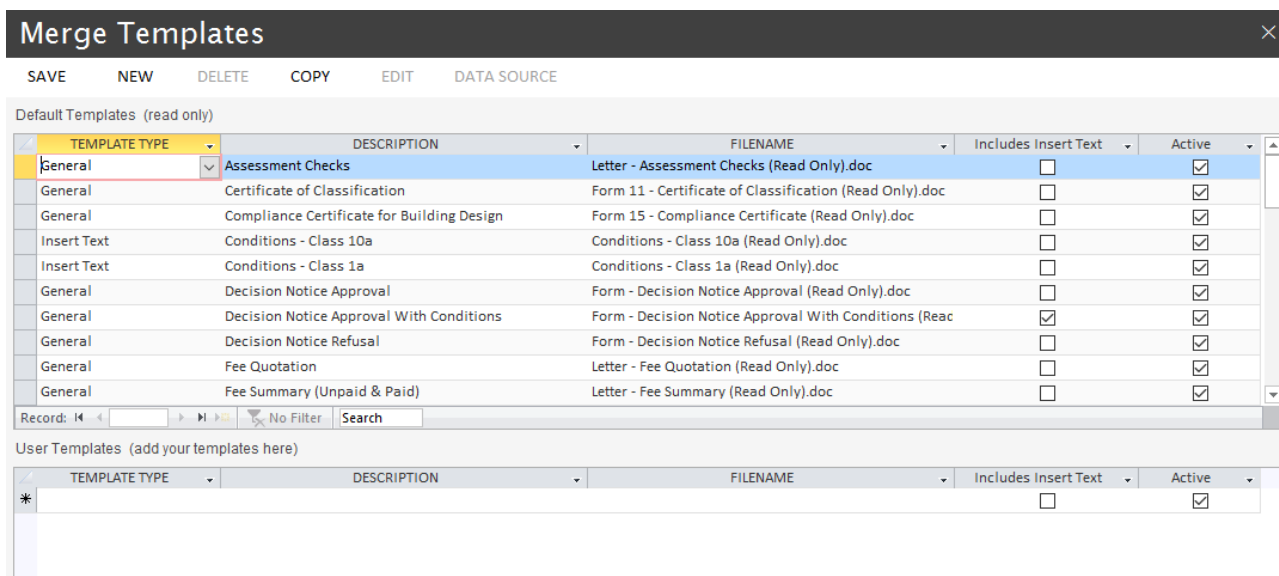
Default Templates

Default templates come preconfigured with BC Office and are controlled by the system. Default templates cannot be changed with the exception of the *Active* field. The *Active* field may be used to deactivate a default template.

The *Copy* command button is used to create a copy of a default template which you can then modify to suit your requirements.

Note

When you create a copy of a default template, the default template will be deactivated and the new template will appear in the User Templates section.



User Templates

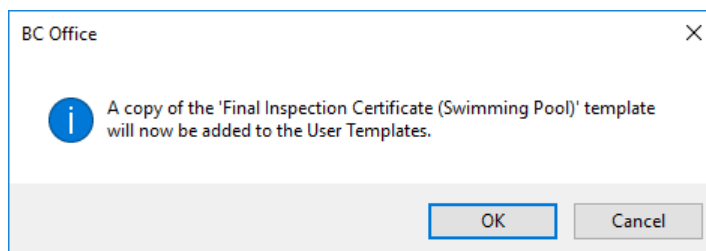
User templates are templates which you can add and maintain. These templates will be combined with the active default templates allowing you to extend the available templates.

The *Edit* command button is used to open the user template in Microsoft Word where you can modify the template.

The *Data Source* command button is used to create a sample data source file which you can then attach to your user template while editing the template in Microsoft Word (see below).

Creating a new merge template using the copy method

1. From the *Default Templates* section, select a template which is similar to your required template and then click the *Copy* command button.
2. On the resulting confirmation prompt click OK to continue.



At this point the default template will be deactivated and a new copy of the template will be added to the *User Templates* section.

3. Select the new template from the *User Templates* section.
4. Click on the *Data Source* command button to create a sample data source file for the new template.

Note

This data source file is required in order to view the available data source fields while editing the template in Microsoft Word.

Make a note of the generated sample data source's filename for use below.

5. Click on the *Edit* command button to open the template in Microsoft Word, where you can customise the template.

6. With the template open in Microsoft Word, use the ribbon to select the *Mailings (tab) > Select Recipients > Use Existing List* option and select the data source file you created in Step 4.
7. You can now customise the new template as required remembering to save any changes before closing.

Note

You can add BC Office merge fields to the template using the Insert Merge Fields button on the Mailings tab.

Creating a new merge template using Microsoft Word

1. Using Microsoft Word, create a blank document and save the document into the BC Office *Template* subfolder.
2. Click the *New* command button on the *Merge Templates* form.
3. Select the *Template Type* for the new template (see below for more on *Template Types*).
4. Enter a unique *Description* for the new template.
5. Select the filename from the *Filename* list of values.

Note

The Filename list of values will automatically list all template files, located in the Template subfolder, which are not yet registered in BC Office.

6. Click on the *Save* command button to register the new template.
7. Click on the *Data Source* command button to create a sample data source file for the new template.

Note

This data source file is required in order to view the available data source fields while editing the template in Microsoft Word.

Make a note of the generated sample data source's filename for use below.

8. With the template open in Microsoft Word, use the ribbon to select the *Mailings (tab) > Select Recipients > Use Existing List* option and select the data source file you created in Step 7.
9. You can now customise the new template as required remembering to save any changes before closing.

Note

You can add BC Office merge fields to the template using the Insert Merge Fields button on the Mailings tab.

Note

All template files must be located in the BC Office Template subfolder.

Assigning a Template

BC Office uses the *Template Type* field to categorise templates which have special processing requirements. Most general templates should be assigned the *General* template type.

The *Template Type* can be used to divide the templates into three main categories, *Bulk Merge* templates (which are only available from the *Bulk Merge* and *Sighting Claims* forms), *DA Merge* templates (which are only available from

the *Letter Merge* form) and *Insert Text* templates (which are only available from the *Letter Merge* form once a supported *DA Merge* template is selected).

The following *Templates Types* are categorised as *Bulk Merge* templates:

- *QBCC OB Claim* – The template assigned this template type will be used by the *Sighting Claims* form to generate the QBCC owner builder permit sighting claim. There can only be one active template with this template type.
- *QBCC Claim* – The template assigned this template type will be used by the *Sighting Claims* form to generate the QBCC receipt sighting claim. There can only be one active template with this template type.
- *QLeave Claim and QLeave Claim Attachment* - Templates assigned these template types will be used by the *Sighting Claims* form to generate the QLeave receipt sighting claim. There can only be one active template with each of these template types.
- *Reminder Notice* - The template assigned this template type will be used by the *Bulk Merge* form to generate the application reminder notices. There can only be one active template with this template type.
- *Reminder Notice (Information Request)* - The template assigned this template type will be used by the *Bulk Merge* form to generate the application information request reminder notices. There can only be one active template with this template type.

Note

Templates with a template type of QBCC OB Permit, QBCC Claim or QLeave Claim will only be available from the Sighting Claims form.

Templates with the Reminder Notice or Reminder Notice (Information Request) template type will only be available from the Bulk Merge form.

The following *Templates Types* are categorised as *DA Merge* templates:

- *General* – Most templates should be assigned this template type. These templates will only be available from the *Letter Merge* form.
- *Information Request* – This template type should be used on all templates which will be used to request additional assessment information from the applicant. When an *Information Request* template is generated the application *Status* will be set to *Information*. These templates will only be available from the *Letter Merge* form.
- *Inspection Result* – This template type must be used on all inspection result templates (i.e. templates that you want to be available on the *Inspection* form). These templates will only be available from the *Letter Merge* form.

Note

Templates with a template type of General and Information Request will only be available from the Application form's Letters command.

Templates with the Inspection Result template type will only be available from the Inspection form's Letters command.

The *Insert Text* template type is used to create sub-templates which can be used as insert text values in the above *DA Merge* templates. These templates will only be available from the *Letter Merge* form once a template which includes insert text has been selected.

Creating a new Insert Text merge template

In addition to the standard data source merge fields, BC Office also supports user customisable *Insert Text* templates which can be selected for inclusion in *DA Merge* templates as an additional merge field. *Insert text* templates can contain any amount of formatted text.

To create a new *Insert Text* template, follow these steps:

1. Using Microsoft Word, create a blank document and save the document into the BC Office *Template* subfolder.
2. Click the *New* command button on the *Merge Templates* form.
3. Select the *Insert Text* as the *Template Type* for the new template.
4. Enter a unique *Description* for the new template.
5. Select the filename from the *Filename* list of values.

Note

The Filename list of values will automatically list all template files, located in the Template subfolder, which are not yet registered in BC Office.

6. Click on the *Save* command button to register the new template.
7. Click *Edit* to edit the content of the new template.
8. Repeat the above steps for each *Insert Text* template.

Your *Insert Text* templates can contain as much or as little text as you require (i.e. you could define all of your approval conditions in a single template or alternatively create a separate template for each condition). If multiple *Insert Text* templates are selected during the letter merge, then all templates will be combined into a single merge field during letter generation.

Once your *Insert Text* templates have been created you need to flag which of the *DA Merge* templates will require insert text selection as part of the letter generation by selecting the *Includes Insert Text* option on the *DA Merge* template (i.e. to include approval conditions using *Insert Text* templates on a Decision Notice you need to ensure the *Includes Insert Text* option is selected on the Decision Notice template).

To define a *DA Merge* template that supports insert text, follow these steps:

1. Select the *DA Merge* template and enable the *Includes Insert Text* option.
2. Click on the *Save* command button to save the new template properties.
3. Click *Edit* to edit the content of the *DA Merge* template in Microsoft Word.
4. Place the cursor at the point in the template where you want the insert text field to be included and enter the following field marker:
{InsertText}
5. Save the template document.

Note

Only templates which have the Includes Insert Text option enabled will support selection of Insert Text values on the Letter Merge form.

Multiple Insert Text templates can you be combined into a single insert text merge field by selecting more than one Insert Text template on the Letter Merge form.

The insert text merge field will be inserted at the {InsertText} field marker location during the letter generation.

Using the Document Archiving form

The *Document Archiving* form is used to archive your imported and generated documents to CD or DVD, from which the document can still be retrieved at a later date.

While, with today's hard drive capacities, the need to archive documents to CD or DVD is less of an issue, you may still find yourself wanting to reduce the size of your BC Office *Document* subfolder for other reasons (e.g. to reduce your backup size).

The *Document Archiving* form allows you to move all imported and generated documents, for the selected applications, from the BC Office *Document* subfolders to a temporary folder, from which you can then burn the contents to CD or DVD, using your preferred burning application.

Note

This Document Archiving utility can only be used when no other users are currently logged in to BC Office.

To archive documents to CD or DVD, follow these steps:

1. Enter a name for the new CD/DVD label in the *Archive Label* field.

Note

When labelling your CD/DVD, you should apply a unique naming standard for each CD/DVD (e.g. BCO_ARCH_1) as BC Office will prompt for this CD/DVD using its label name when you try to view an archived document in the future.

2. Enter or select an empty folder name in the *Temporary Folder* field. The archive process will use this folder to build the new CD/DVD image. You can select or create an empty folder by clicking on the *Select Temp Folder* command button.
3. Select the *DAs Closed Before* date prior to which all closed applications will be selected for archiving.
4. Select the CD or DVD target archive image capacity.
5. If the estimated archive size exceeds the target CD/DVD image capacity, then you will need to readjust the *DAs Closed Before* date to reduce the number of selected applications.

6. Once all details are completed and the estimated archive size is within the target image capacity, click on the *Archive* command button to commence the archive process.
7. On the *Confirm Archive* prompt click on the *OK* button to confirm the archive.
8. When the archiving process is complete, you can use your preferred burning software to copy the contents of the temporary folder to the CD or DVD.

Note

When copying the contents of the temporary folder to the archive CD/DVD the folder's contents must be copied into the root of the CD/DVD directory (i.e. copy all of the subfolders, e.g. 20110100 to the top of the CD/DVD directory, do not copy the temporary folder itself to the CD/DVD).

To view a document which has been archived to CD or DVD, simply select the document as usual and when prompted, enter the correct CD/DVD into the CD/DVD drive.

Using the Preferences form

The *Preferences* form is used to set your profile details and BC Office preferences.

Using the Profile tab

The *Profile* tab allows you to record your business address and contact details. These details are used on all default merge templates and are available as merge fields in all merge template data sources.

Note

These details should be entered immediately following installation and prior to generating your first merge letter. You can change these details at any time.

Using the Options tab

The *Options* tab allows you to customise the BC Office system settings. These settings will affect all users of BC Office.

The *Show Application Window* option allows you to set the initial window state of the main BC Office window to either *Normal* or *Maximised*. The *Autosave Changes* option allows you to choose if a confirmation message should be shown before saving changes. The *Document folder monitoring* option controls whether BC Office automatically monitors the application document archive folders for new document files being manually added to the folder.

The screenshot shows the 'Preferences' dialog box with the 'Options' tab selected. The dialog has a title bar 'Preferences' and a close button. Below the title bar are buttons: 'SAVE', 'UPDATE LICENCE', 'VALIDATE DA STATUS', 'RESET DA NUMBER', and 'CLEAR LOGINS'. The 'Options' tab is active, showing several sections:

- APPLICATION**: 'Show Application Window' is set to 'Normal', 'Autosave Changes' is set to 'No', and 'Document folder monitoring' is checked.
- LETTER MERGE**: 'Show Insert Text Preview' is set to 'Yes'.
- DASHBOARD REMINDERS**: 'Action Note Reminders Due Within' is set to 7 days, 'DAs Due To Expire Within' is set to 7 days, and 'DAs Unapproved After' is set to 28 days.
- DA EXPIRY**: 'Expiry Period (Months)' is 24, 'Reminder Period (Months)' is 4, 'Grace Period (Months)' is 3, 'Starting DA Number' is 20160001, 'Information Request Period (Months)' is 6, and 'Information Request Reminder Period (Months)' is 1.
- DA DEFAULT FEE RATES**: 'Hourly Fee Rate' is \$120.00 and 'Inspection Fee Rate' is \$85.00.

The *Show Insert Text Preview* option is used to enable/disable the Insert Text preview panel on the *Letter Merge* form. This might be desirable if the previews are slow to load.

The *DA Expiry* options allow you to customise the reminder notice bulk merges. These options are:

- *Expiry Period* – When an application is approved, the *Expires On* date will default to the *Approved On* date plus the number of months set for the *Expiry Period*.
- *Reminder Period* – This preference is used to define the reminder period in which a reminder notice should be sent.
- *Grace Period* – When issuing a reminder notice, the *Notified Expiry Date* will be the greater of the current *Expires On* date and the bulk merge date plus the number of the months defined by the *Grace Period*. This will ensure that the client is provided the minimum required reminder notification before the application expires. If the *Expires On* date falls within the *Grace Period*, then the *Expires On* date will be updated, by the bulk merge process, to the *Notified Expiry Date*.
- *Starting DA Number* – This preference allows you to set the *DA Number* from which the reminder notice requirements will apply.
- *Information Request Period* – The number of months from issuing of the Information Request merge letter in which the applicant must respond.
- *Information Request Reminder Period* – This preference is used to define the reminder period (in months) in which an information request reminder notice should be sent.

Note

For more information on the use of the *DA Expiry* options, refer to the section on *Customising the Reminder Notice of Lapsing Approval bulk merge*.

The *Dashboard Reminders* options allow you to customise the active reminders on the dashboard. These options are:

- *Action Note Reminders* – This preference is used to enable/disable the action note reminder. The reminder is used to show action notes which have a reminder date due to fall within the specified number of days of the current date.
- *DAs Due To Expire Reminder* – This preference is used to enable/disable the expired application reminder. The reminder is used to show applications which are due to expire within the specified number of days of the current date.
- *DAs Unapproved Reminder* – This preference is used to enable/disable the unapproved application reminder. The reminder is used to show applications which have passed the specified number of days without being approved.

The *Calendar* tab is used to add and maintain the calendars and calendar times used on the *Calendar* form.

Note

For more information on customising the *Calendar* settings, refer to the section on *Setting Calendar Preferences using the Preferences form*.

The screenshot shows the 'Preferences' window with the 'Calendar' tab selected. The window has a title bar 'Preferences' and a close button. Below the title bar are buttons: 'SAVE', 'UPDATE LICENCE', 'VALIDATE DA STATUS', 'RESET DA NUMBER', and 'CLEAR LOGINS'. The 'Calendar' tab is active, showing sub-tabs: 'Profile', 'Options', 'Calendar', 'Check Groups', and 'Logins'. The 'Calendar' sub-tab has 'Add' and 'Delete' buttons. On the left, there is a table of calendars:

CALENDAR NAME	Active
Inspection Bookings 1 (Half Hour)	<input checked="" type="checkbox"/>
Inspection Bookings 2 (Hour)	<input checked="" type="checkbox"/>
*	<input checked="" type="checkbox"/>

On the right, the 'Inspection Bookings 1 (Half Hour)' calendar is selected, showing its 'Add' and 'Delete' buttons and a detailed table of times:

START TIME	END TIME	Active
8:00 AM	8:30 AM	<input checked="" type="checkbox"/>
8:30 AM	9:00 AM	<input checked="" type="checkbox"/>
9:00 AM	9:30 AM	<input checked="" type="checkbox"/>
9:30 AM	10:00 AM	<input checked="" type="checkbox"/>
10:00 AM	10:30 AM	<input checked="" type="checkbox"/>
10:30 AM	11:00 AM	<input checked="" type="checkbox"/>
11:00 AM	11:30 AM	<input checked="" type="checkbox"/>
11:30 AM	12:00 PM	<input checked="" type="checkbox"/>
12:00 PM	12:30 PM	<input type="checkbox"/>
12:30 PM	1:00 PM	<input type="checkbox"/>
1:00 PM	1:30 PM	<input checked="" type="checkbox"/>

The *Check Group* tab is used to add and maintain the check groups used on the *Insert Checks* form.

The screenshot shows the 'Preferences' window with a red header bar containing the title 'Preferences' and a close button. Below the header is a toolbar with buttons: 'SAVE', 'UPDATE LICENCE', 'VALIDATE DA STATUS', 'RESET DA NUMBER', and 'CLEAR LOGINS'. A tabbed interface below the toolbar shows 'Profile', 'Options', 'Calendar', 'Check Groups' (selected), and 'Logins'. The 'Check Groups' tab has 'Add' and 'Delete' buttons. It contains a 'CHECK GROUP' dropdown menu with a '*' icon and a list area. To the right, there are sub-tabs for 'Consents', 'Certificates', and 'Assessments'. The 'Consents' sub-tab is active, showing 'Add' and 'Delete' buttons, a 'CONSENT CHECKS' dropdown menu with a '*' icon, and a list area.

Adding a New Check Group

1. Click the *Add* check group command button or navigate to the new record on the *Check Group* list.
2. Enter a description for your new group.
3. Select the required check category tab:
 - a. Consent – these checks are used to record any referral agency consents or approvals which are required for the proposed building work
 - b. Certificate – these checks are used to record any design, inspection or aspect certificates which are required for the proposed building work
 - c. Assessment – these checks are used to record the key checks undertaken in assessing the application
4. Click the *Add* check type command button or navigate to the new record on the *Check Type* list.
5. Enter the required *Check Types* for the new group. While the *Check Type* list of values contains a useful default set of check types, you can easily add your own check type codes using the Codes form (see following steps).
6. Click the *Save* command button to save any unsaved changes.

Adding New Check Type Codes

1. Open the *Codes* maintenance form from the *Administration* menu.
2. Select the *Check Category Codes* code type.
3. Select the new check's *Check Category* from the *Sub Code* field.
4. In the User Codes list enter the new check details.
5. Click the *Save* command button to save any unsaved changes.

About the Logins tab

The *Logins* tab shows the user login history for the past 30 days.

Preferences

SAVE UPDATE LICENCE VALIDATE DA STATUS RESET DA NUMBER CLEAR LOGINS

Profile Options Calendar Check Groups Logins

Login Time	Logout Time	Login	Computer	IP Address
03/06/2016 05:56 PM		Gavin		
03/06/2016 05:31 PM	03/06/2016 05:55 PM	Gavin		
03/06/2016 05:26 PM	03/06/2016 05:26 PM	Gavin		

Record: 1 of 3 No Filter Search

Updating your Licence details

The *Update Licence* command button on the *Preferences* form is used to update your licence details should you purchase additional licences.

When purchasing additional licences, you will be issued with a new *Licence Key* which will need to be entered into BC Office using the following form.

Note

When entering your new licence details, it is important to enter the details exactly as provided to you.

Setup - Licence Details

Licence Details

Enter your new licence details below to reactivate the product.

Product Name: BC Office 4

Organisation Name:

Number of Licences:

Licence Key:

OK Cancel

Validating all DA Statuses

The *Validate DA Status* command button on the *Preferences* form is used to validate all application statuses.

While BC Office maintains the application *Status* as changes are made to the application, this option allows you confirm that all statuses are valid by recalculating the *Status* on all applications. You only need to perform this action if you suspect the *Status* field has become invalid.

Note

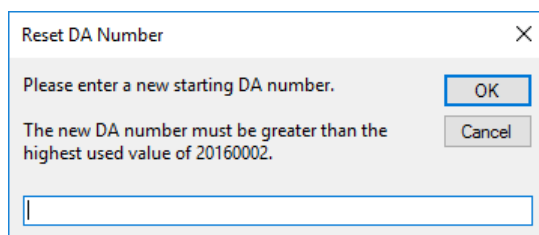
Depending on the number of applications to process this validation may take several minutes to complete.

Resetting the DA Number generator

The *Reset DA Number* command button on the *Preferences* form is used to reset the application number.

BC Office automatically generates the next DA number based on the number set here. The number must be a valid number greater than the current *DA Number*.

When resetting the DA number generator, the following prompt will ask you for the new number to assign to the number generator. In this example, the current number is 20110004 and the new number is being set to 20120001.

A screenshot of a Windows-style dialog box titled "Reset DA Number" with a close button (X) in the top right corner. The dialog contains two lines of text: "Please enter a new starting DA number." followed by an "OK" button, and "The new DA number must be greater than the highest used value of 20160002." followed by a "Cancel" button. Below the text is a text input field with a vertical cursor at the beginning.

Note

For more information on the DA number generator, refer to the sub-section About the DA Number, under the Using the Application form section.

OFFLINE MODE

Using *Offline Mode*, you can disconnect BC Office from the server database and take a local copy of the database with you on your notebook computer.

While working in *Offline Mode* your entire BC Office database will be available for read only access, however you will be able to perform the following changes:

- Adding new inspection results using the *Inspection* form.
- Generating new merge letters using the *Letter Merge* form.
- Add new action notes using the Action Note form.

The following limitations will apply while working in *Offline Mode*:

- Changes made by other users will not be available until you return online.
- File and document attachments will not be available, including plans from the *Plan Register* and existing documents on the *Application* form's *Documents* tab.

The *Online/Offline* menu button, located on the BC Office tab of the menu ribbon, is used to switch between *Online* and *Offline Mode*. The *Online/Offline* menu button will always show the current mode.

Note

In Offline Mode, all forms will be read only with the exception of the Inspection and Action Note forms.

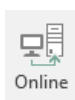
Depending on the size of your BC Office database and the speed of your network, entering Offline Mode may take several seconds.

If you make any offline changes and don't synchronise these changes when you reconnect to the server database, all of these changes will be lost.

Working Offline

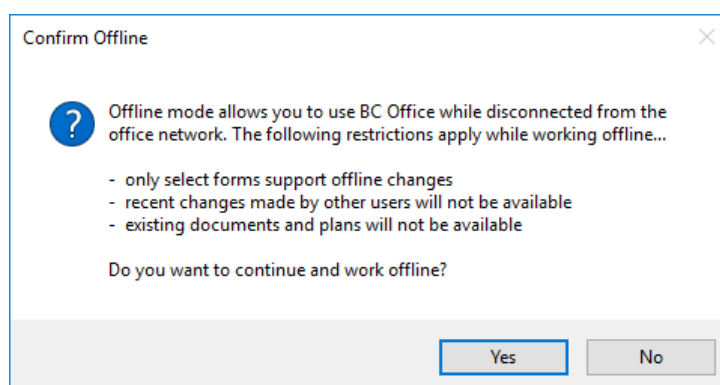
To start working offline, perform the following steps:

1. Within BC Office, close any open forms and reports leaving only the *Dashboard* open.



2. Click the *Online* menu button from the BC Office tab of the menu ribbon.

3. Click Yes to confirm you want to start working offline.



4. Wait for the offline files to be copied to your local computer.

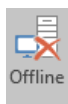


5. On completion, the *Offline* menu button should now indicate that you are offline.
6. You can now disconnect your notebook from the network and take BC Office with you.

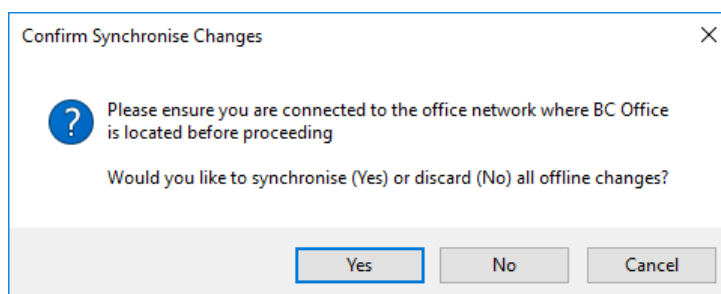
Synchronising Offline changes

When you are ready to return to the office and synchronise your offline changes, perform the following steps:

1. Reconnect your notebook to the network and check that the shared network drive, on which the BC Office server files are located, is available.
2. Within BC Office, close any open forms and reports leaving only the *Dashboard* open.



3. Click on the *Offline* menu button from the BC Office tab of the menu ribbon.
4. Click *Yes* to confirm you want to synchronise the offline changes.



5. Wait for the offline changes to be synchronised with the server database.



6. On completion, the *Online* menu button should now indicate that you are back online.

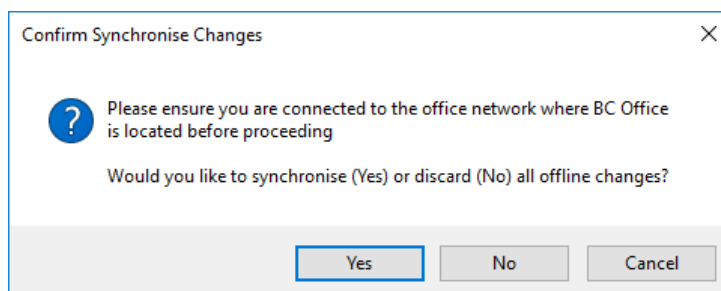
Cancelling Offline changes

When you want to return to the office without synchronising your offline changes, perform the following steps:

1. Reconnect your notebook to the network and check that the shared network drive, on which the BC Office server files are located, is available.
2. Within BC Office, close any open forms and reports leaving only the *Dashboard* open.



3. Click on the *Offline* menu button from the BC Office tab of the menu ribbon.
4. Click *No* to confirm you want to discard the offline changes.



5. Wait for the database to reconnect with the server database.



6. On completion, the *Online* menu button should now indicate that you are back online.

Note

If you make any offline changes and don't synchronise these changes when you reconnect to the server database, all of these changes will be lost.

PERFORMING COMPACT AND REPAIR OPERATIONS

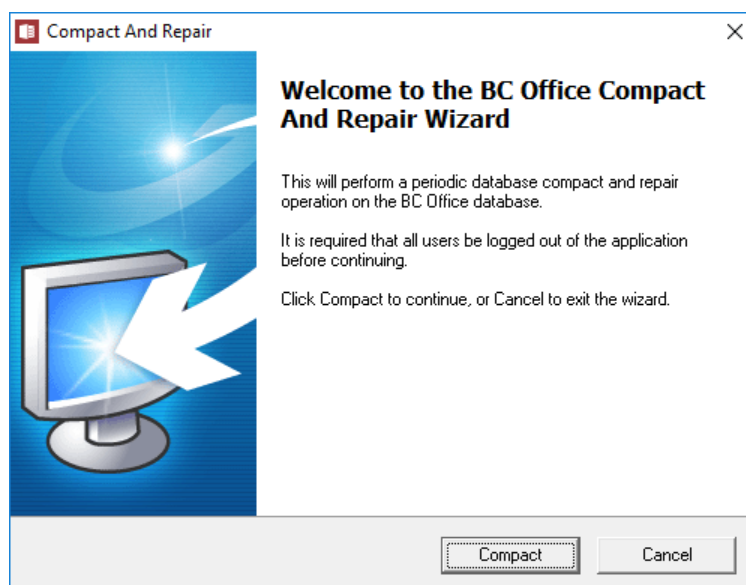
As data is added to and removed from BC Office, the backend database will continue to grow and may become fragmented over time. This fragmentation can in turn cause the database to unnecessarily double or triple in size.

To assist in maintaining the database, BC Office uses a *Compact and Repair* utility to remove any unnecessary fragmentation. This utility is scheduled to automatically perform the *Compact and Repair* operation, at regular periods, upon opening BC Office.

Note

This utility can only be used if no users are currently connected to the database.

When the *Compact and Repair* is due, you will see the following screen when you open BC Office, from which you can click *Compact* to perform the *Compact and Repair* or *Cancel* to login to BC Office without performing the *Compact and Repair* operation.



PERFORMING BC OFFICE BACKUPS

Performing regular backups should be considered a top priority for any business. Although Microsoft Access on which *BC Office* is based is generally a reliable product failures can, do, and probably will occur. They may be caused by hardware failure, power outages or other unforeseen problems.

More likely will be those problems caused by human error resulting in undesired changes to or even deletion of crucial files.

If you perform regular backups, preferably on a daily basis, you will hopefully reduce the possibility of and increase your recovery from such file loss.

The safest method of doing backups is to record them on separate media, such as tapes, removable drives, writeable CD/DVDs, etc., and then store your backup sets in a location separate from your host system, preferable in an offsite location.

When backing up *BC Office* you should ensure all users have logged out of the application before backing up the entire application folder (e.g. C:\BC Office), including the following subfolders:

- *Document* – The document archive where all documents are stored
- *Plan Register* – The location where all Survey Plans are stored
- *Template* – The location where all merge templates are stored

Note

It is also strongly recommended that an additional backup be performed immediately prior to installing any product upgrade.

FREQUENTLY ASKED QUESTIONS

How do I reset the DA Number?

Refer to the *Resetting the DA Number generator* section.

I can't find the required contact name in the *Local Authority* or *Certified By* list of values.

Make sure the contact exists and that the contact has been made a member of the *Local Authority* or *Building Certifier* group. Refer to the *Using the Address Book form* section.

I can't create a *Builder* relationship for an existing contact?

You need to ensure the contact is a member of the *Builder* group. Refer to the *Using the Address Book form* section.

How do I add new values to a list of values (e.g. *Street type*, *Consent Type*, *Inspection Type* etc)?

Refer to the *Using the Codes form* section.

How do I add or customise a merge template?

Refer to the *Using the Merge Templates form* section.

How do I edit the label merge templates to change the label size?

The two Microsoft Word label templates are located in the BC Office *Template* subfolder and will need to be edited manually to suit your label stationary.

The *Cover Sheet Label* template is named *Labels - Cover Sheet (Read Only).doc* and the *Envelope Label* template is named *Labels – Envelope (Read Only).doc*.

As these file are saved as read only files, you will need to use Windows Explorer to remove the read only file attribute (under *Properties*), before you can edit the file using Microsoft Word.

I get a *Compact and Repair* error telling me the database is currently in use when all users are already logged out.

Sometimes the Microsoft Access database transaction file doesn't get removed when the last user logs out of the database. Try logging back into BC Office and logging out again to see if the transaction file gets removed.

If the above doesn't work and you are certain no one is logged in, you can manually remove the transaction file, by deleting the file with the *.laccdb* file extension from the BC Office folder.

Please do not delete any files from the BC Office folder unless you know what you are doing.