HARRIS
GOVERN

Govern
General Information

Release 6.0 version 1.0

Last Revision Update: 10/1/15

Harris Govern

Govern^{TM}

Version: 1.0

September 2015 - Release 6.0

Disclaimer

Harris Govern has taken due care in preparing this manual. However, nothing contained herein modifies or alters in any way the standard terms and conditions of the purchase, lease, or license agreement by which the product was acquired, nor increases in any way the liability of Harris Govern to the customer.

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System Requirements

Server and Network Requirements

Note: It is recommended, but not mandatory, to set up three physical servers. The first server would be for the *Database*, the second for the *Application*, and a third would function as, if required, for the *Web*. If, however, you decide to use one physical server for both the *Application* and *Web*, you will need to revise the minimum recommended configuration.

Note: Deployments on the application server are maintained with the Deploy EZ application, ensure that this server has Web access and an open FTP port.

SERVER HARDWARE	
Hardware Type	**Minimum Specifications**
DATABASE SERVER	
Platform	Windows & Unix[1]
Database Package	Oracle[2] or Microsoft® SQL Server[3] 2008 R2, 2012, 2012 R2, 2014
CPU	2 GHz / 1 MB cache, 800 MHz FSB *(2.4 GHz Quad-core 1.066 GHz FSB - Recommended)*
RAM	16 GB DDR2[4] *(32 GB DDR2 or greater - Recommended)* *Note that specified memory requirements are for the core Govern Applications alone, i.e. without 3rd party application integrations. Third party integrations can significantly impact system performance due to their individual requirements. A review of requirements of integrated applications should be performed prior to their installation. Also refer to A Note for users of Virtual Machines (VM's) below.*
Disk Space	Dependent upon the size of data to be managed; RAID V with a minimum of 500 GB of hard disk space is a recommended configuration. *Note that Disk Space is dependent upon Database and Disk Mirroring requirements*
Operating System	Microsoft® Windows® Server 2008 R2, Server 2012, or greater

SERVER HARDWARE	
Hardware Type	**Minimum Specifications**
Network	100 Mbit NIC *(1 Gbps - Recommended)*
Peripherals	DVD / CD ROM Drive
WEB SERVER	
Platform	Microsoft® Windows® 2008 R2, with IIS 7.5, Server 2012 R2 with IIS 8.5
CPU	3 GHz / 1 MB cache, 800 MHz FSB *(2.4 GHz Quad-core 1.066 GHz FSB - Recommended)*
RAM	8 GB DDR2 *(16 GB - Recommended)*
Disk Space	100 MB for each site being maintained. Additional space will be required for reports, and temporary space for submitting multimedia documents.
Operating System	Microsoft® Windows® Server 2008 R2, Windows® Server 2012, 2012 R2
Network	100 Mbit Network Interface Card (NIC) *(1 GBit Recommended)*
WEB SERVER HARDWARE	
Peripherals	DVD / CD ROM Drive
Other	Redundant power supply and fans

Server and Client Operating Systems not Supporting Microsoft's .NET Framework 4.5

Users should note that the .NET Framework 4.5 is not supported by any of the following:

CLIENT OS:

Windows Windows 7 / Windows 8/8.1 (32-bit and 64-bit)

SERVER OS:

Windows Server 2008, all editions
Windows Server 2008 R2 SP1 (32-bit)
Refer to the following link for full information:
http://msdn.microsoft.com/en-us/library/8z6watww.aspx

A Note for users of Virtual Machines (VM's)

Users of Virtual Machines (VM's) should note that when multiple servers are being hosted in a Virtual Machine on the same physical servers, the requirements for each individual server must be carefully managed as it can impact use of system resources. For example, users may decide to host the *Database Server*, *Application Server*, and an *eGovern Web server* in a *VM* that is running on the same physical server. In such a situation, as a result of the varying requirements of each server, planning is required to address how shared system resources are allocated to the individual server, and the *VM.*

Client and Network Requirements

CLIENT HARDWARE	
Hardware Type	**Minimum Specifications**
CLIENT WORKSTATIONS	
Platform	Microsoft® Windows®
CPU	Intel® Core™ i3 Processor
RAM	4 GB[5] *(8 GB RAM - Recommended)*

CLIENT HARDWARE	
Hardware Type	**Minimum Specifications**
Disk Space	40 GB of hard disk space [6]
Network	100 Mbit Network Interface Card (NIC) [7] *(1 GBit Recommended)*
Operating System	Microsoft® Windows® 7 Professional (32-bit and 64-bit), or Windows 8.x Professional (32-bit and 64-bit)
Other	17” Display [8] WPF Direct 3D Graphics Card
MOBILE HARDWARE (Laptops / Tablets)	
Platform	Microsoft® Windows®
CPU	Intel® Core™ i3 Processor
RAM	2 GB Internal RAM - 4 GB Recommended (4 GB recommended for Open Forms Laptop / Tablet)
Operating System	Microsoft® Windows® 7 Professional (32-bit and 64-bit), or Windows® 8.x Professional (32-bit and 64-bit) [7]
Network	100 Mbit Network Interface Card (NIC) [8]
Peripherals	Extra Battery, Docking Station in vehicle, plug in keyboard
Other	12.1” (1024 x 768) Display (Recommended 1280 x 1024) Colors: True Color (32 bit) [9]
Disk Space	160 GB of hard disk space
Integrated Communications	Optional Integrated Mobile Broadband WiFi® 802.11 a/b/g/n 10/100/1000 Ethernet
THIN CLIENT PC / SERVER	
Operating System	Microsoft® Windows® 2008 Terminal Server **OR** Citrix Metaframe

1) *The version of UNIX will be dependent upon the manufacturers recommended version of Oracle.*
2) *Oracle 11g, and 11g R2 and greater are supported.*
3) *Microsoft® SQL Server 2008, SQL Server 2008 R2, SQL Server 2012, SQL Server 2012 R2 are supported.*
   NOTE: *Although these servers are supported, the* **Reference Database** *for the OpenForms Models is only available as a SQL Server 2008 R2 database.*
4) *CPU and RAM requirement may vary depending upon the amount of users and the number of parcels managed by the application.*
5) *Minimum - 4 GB (recommended - 8 GB).*
6) *Govern requires a minimum of 40 GB of temporary storage used while running the application.*
7) *Internet Explorer must support HTML 3.0 or higher.*
8) *Govern's performance is dependent upon network bandwidth because files, reports, icons, images, and data are downloaded from servers.*
9) *The minimum required resolution for Govern Release 4.0 or greater is 1024 x 768 (1280 x 1024 Recommended) - Minimum Colors: True Color (32 bit).*

Server and Client Operating Systems not Supporting Microsoft's .NET Framework 4.5

Users should note that the .NET Framework 4.5 is not supported by any of the following:

CLIENT OS:

Windows Vista / Windows 7 / Windows 8 (32-bit and 64-bit)

SERVER OS:

Windows Server 2008, all editions
Windows Server 2008 R2 SP1 (32-bit)
Refer to the following link for full information:
http://msdn.microsoft.com/en-us/library/8z6watww.aspx

Supported Web Browsers

Note: Internet browsers are continuously developed and upgraded, as a result compatibility issues may arise. The following list is by no means an exhaustive one, and cannot completely take into account the incompatibilities that can occur between browser versions and versions of operating systems.

Web Browsers

The *MS Govern eComponents* are compatible with the following versions of these popular Web browsers.
It can be assumed that Web browsers that do not appear on this list are not supported.

Browser	Compatible Version
Microsoft Internet Explorer	9.0 and above
Mozilla Firefox	3.0 and above
Google Chrome	2.0 and above
Apple Safari	3.1 and above

Introduction

Overview

OpenForms™ and Govern

Users that are familiar with Govern for Windows will note that Govern incorporates the functionality of the Visual Basic 6 (VB6) product, with the added security and performance of the *Microsoft .NET Framework*.

The Prerequisite Applications

Before successfully using Govern to access and manipulate your data, the data must first be prepared. This preparation involves the use of other *OpenForms*™ applications. These include applications for the design of database elements like Business Entities and Business Models that will, by their design, begin to provide the security required to protect your data. Once the database elements have been created, they will then need to be configured as *OpenForms*™, and *Profiles*. Securities, or user access rights, surrounding the Govern application that were previously applied in the Govern Security Manager (GSM) are now applied at the forms design stage. When completed, the *Govern* application can be used to manipulate your data.

What's New

This section lists new features, or new ways of performing an old function in Govern release 6.0. These new features are indicated by the **NEW!** symbol.

General Interface

General GUI - Govern Help & Support

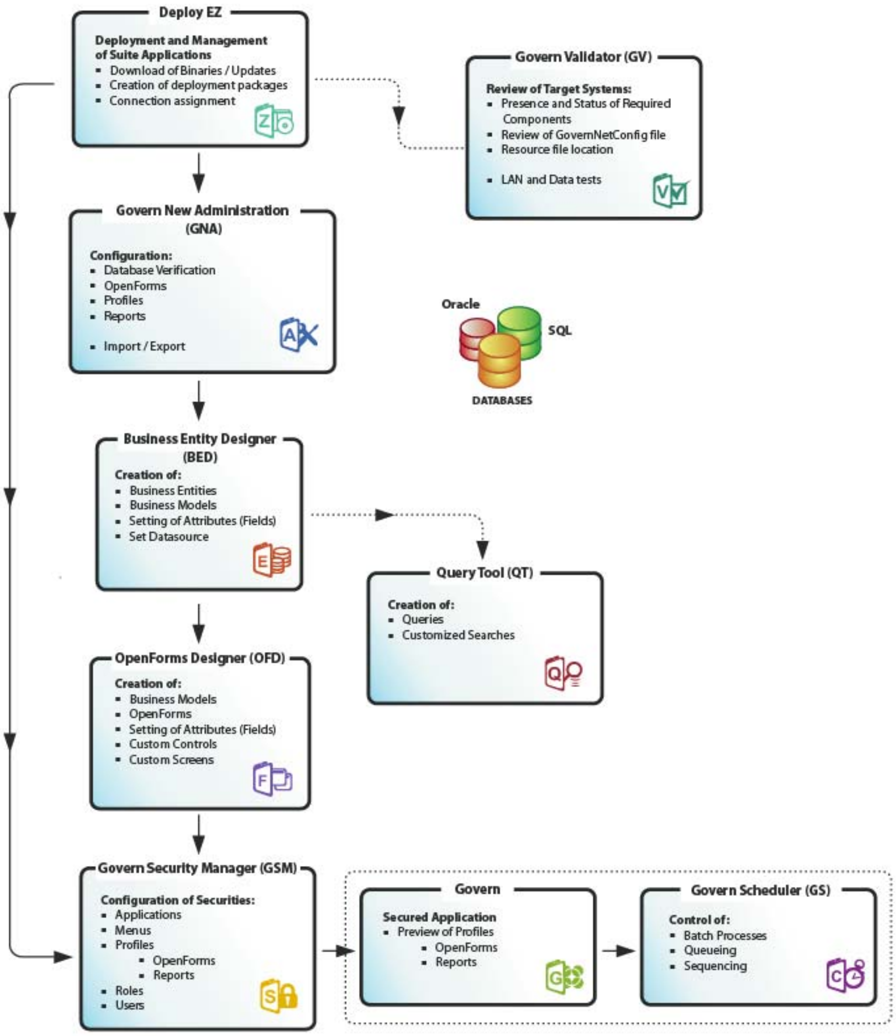
This is managed by Deploy EZ during installation or update. During the install, the required directories are created and help content is updated. Users can customize help content with custom Help directories. *See Help Content Directory Structure on page 122 for details about Custom Directories.*

Note: No security is imposed on Custom Help directories. This is the default setting for the installation. *See Custom Directories for details about Custom Directories.*
Administrators that want to limit user access must use Windows security. Security is on a per user basis.

Hide Search Toolboxes

This is a User Interface (UI) feature that will disable the default behavior of a persistent Search Toolbox. *See Hide Search Toolboxes on page 41 for details.*

The OpenForms™ Workflow



The above *OpenForms™* workflow illustrates the sequence of the applications that are required for data preparation.

Note: For detailed explanations of the functionality of each of the applications in the workflow, refer to their respective user guides.

Chapter 1: Starting Govern

Overview

The *Govern Deploy EZ™ Publisher* is the application that is used to deploy all Govern applications. As a result, administrators should refer to the *Govern Deploy EZ™ Installer* guide for pre-installation activities and installation instructions.

Method of Authentication

Administrators should note that during the setup of the deployment package containing the *Govern application*, at the *Deployment Authentication Type* option, *Microsoft Active Directory* (**MSAD**) is the default. When *MSAD* is set as the authentication method, users that have been logged into windows will have unhindered access to the application. Users that select the *GOVERN* authentication method will be presented with a login screen.

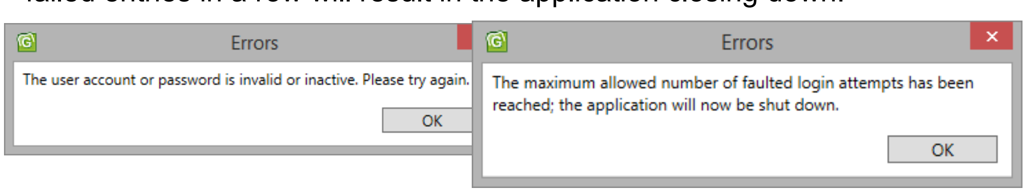
> **Note:** As a result of selecting the GOVERN authentication method, users will be authenticated with the Govern user table (Table: **USR_USERFILE**), administrators should ensure that users are entered as Govern users. For details about creating a user, see the User Maintenance section of this guide. Users should note that an authentication method of **NONE**, i.e. "no authentication", is not recommended.

Users presented with a Log-in screen should...

1. Ensure that the correct database connection has been selected; enter a user name and password.
2. Click **OK** to start the program.

If an incorrect User name and/or Password combination is entered, an error message will be displayed; click OK, and make any required corrections.

Users have a maximum of three (3) attempts to make a correct entry; three failed entries in a row will result in the application closing down.



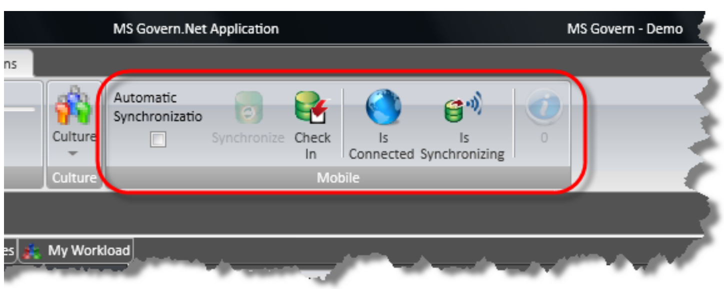
The Govern User Interface

Note: For documentation purposes, the default view of the interface set at installation will be presented to illustrate examples.

The *Govern* user interface is designed to allow quick access to the required areas of the application. In the interface there is extensive use of *tabbed* forms, *ribbons*, and *auto-hide* windows. The main interface can be reconfigured through *drag and drop* actions. Once the interface has been configured, when the application is closed, the settings are saved. When the application is re-opened, the changes that were made become the new default until they are again changed by the user.

Note: As a result of the users ability to reconfigure the appearance of the interface, it should be noted that each users interface may differ in appearance. In addition, not all users will be able to see all aspects of the interface, nor will all features be present. This can be due to security restrictions; when a feature is not present, contact your administrator to verify that there are no restrictions in place.

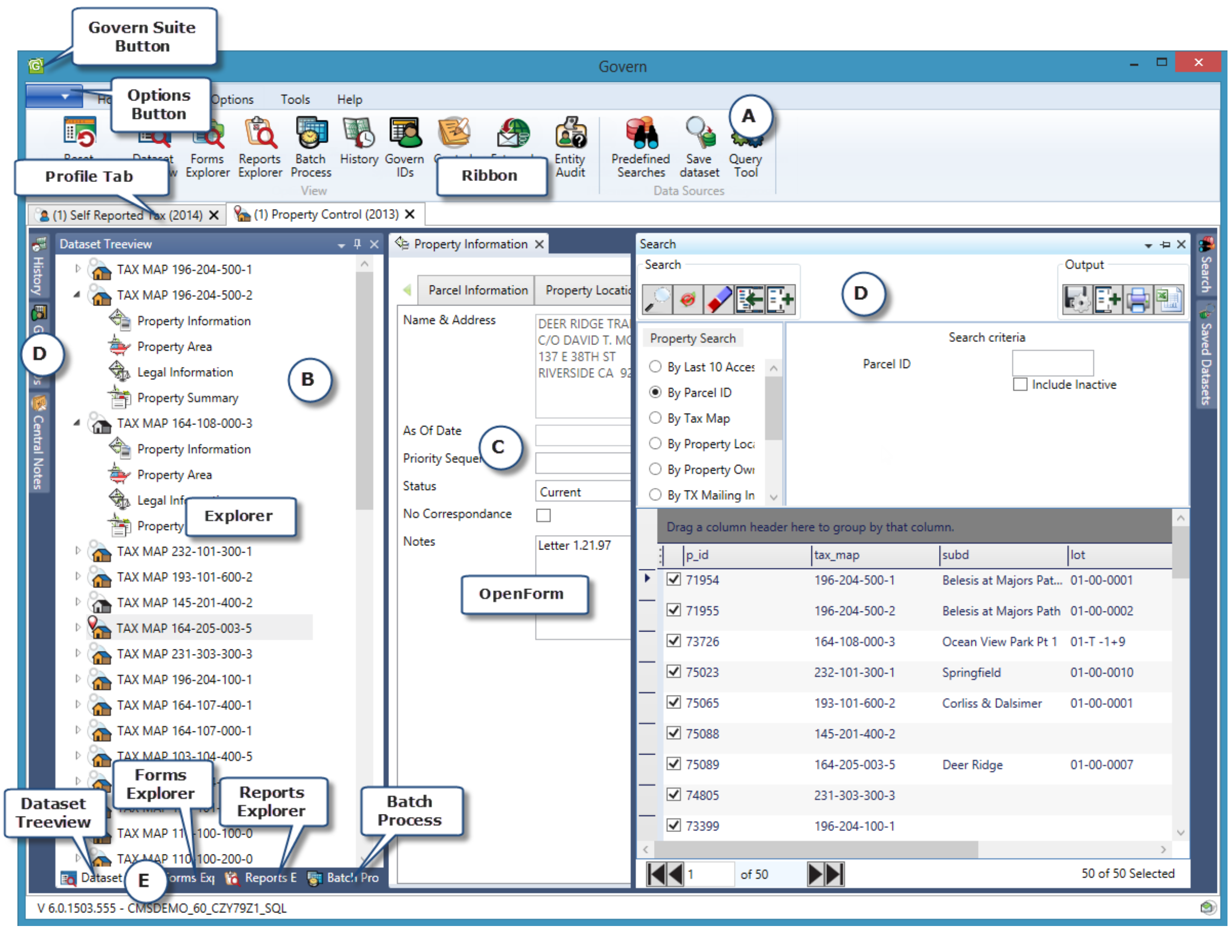
Mobile Users



Note: The current version of the mGovern application is Release 5.1.

With mGovern, Govern has support for *Mobile Devices* that meet the system requirements to run *mGovern* modules, i.e. *Mobile Appraiser*, *Mobile Inspector*, and *Mobile Auditor*. The functionality of the *mGovern* mobile installation and the *Govern* desktop client installation, are identical. There are specific areas of the interface that differentiate the Mobile Installation from that of the standard desktop client. Due to the nature of the mobile installation, features are added to allow for the *Search* process, the *Check-In / Check-Out* process, and a Synchronization process for when data is modified in the field by an appraiser. For changes to the interface that are related to the *Govern Mobile* application, *refer to the Govern Mobile user guide*.

Interface Highlights

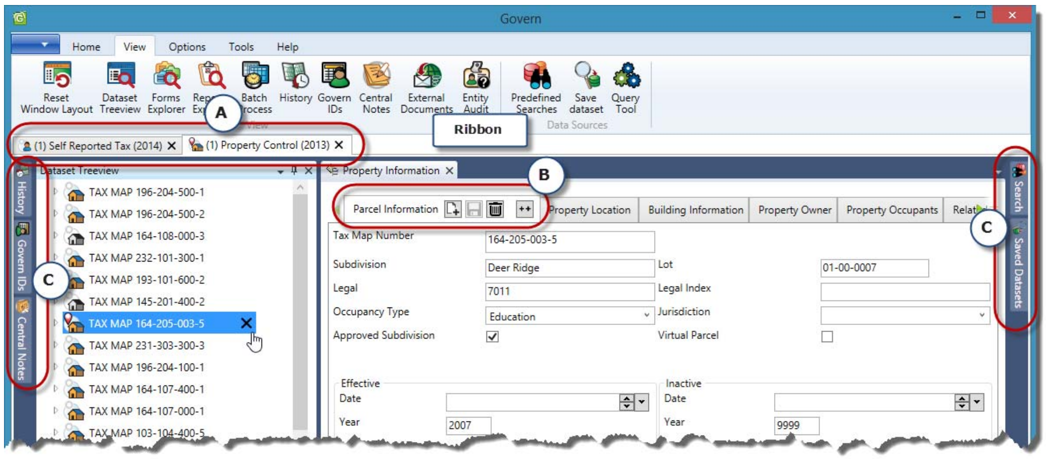


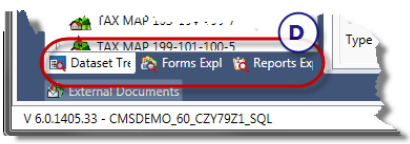
As is standard for *Govern* applications, the version number and the name of the *Connection Key* that is used to access the database is located on the lower left hand side (**E**). On the lower right hand side is a status indicator for the Govern *Global Message*.

Principal Areas

The default interface consists of an application window that is divided into three (3) areas that are referred to as *Panes* (**B**,**C**,**D**), and a region referred to as the Ribbon (**A**) that runs along the top.

Tabs indicating open *Profiles* (**A**) are found in the area below the *Ribbon*. Within *Profile* tabs are the workspace containing *OpenForms* (**B**), *Tabbed Panes* (**D**), and *Auto-hide* panes (**C**); some auto-hide panes are referred to as Toolboxes.





Tabbed Panes

In the interface, by default, a single pane can contain sub panes. The *Forms Explorer*, *Reports Explorer*, and the *Dataset Treeview* are panes, that by default, are accessed through tabs located at the bottom of the Explorer pane. The *My Workload*, and the *Information and Predefined Queries* panes, are by default accessed through tabs that are located below the ribbon. The *Predefined Searches* tab, is accessed through a tab that is located on the right hand side of the interface.

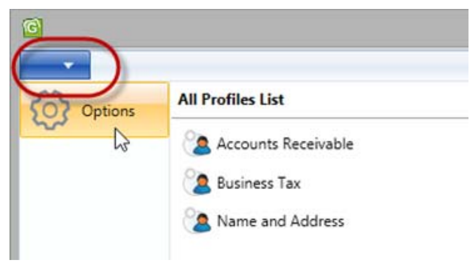
Auto-Hide Panes

Some tabbed panes are set to *auto-hide*, this means that they will appear when the mouse pointer is placed over them. *See Auto Hide: on page 52.* If the pane is not selected and the mouse pointer is moved away from the vicinity of the pane, the window will recede back to the location of the tab. These types of panes are at times referred to as **Toolboxes**.

> **Note:** At times tabbed panes may not recede back to their original location when the mouse pointer is no longer in the vicinity of the tab. When this occurs, moving your mouse pointer over another tabbed pane will force the pane to recede. Alternatively the Hide Search Toolboxes option can be used to hide the Search tabbed pane after a load of Search results to the Treeview. *See Hide Search Toolboxes on page 41 for details.*

The position of tabbed panes can be modified through a series of guides that are part of the interface. *See The Explorer panes on page 51 for details.* The *Ribbon* can also be modified through floating menu options. *See Pane Options Button on page 51 for details on pane menus and buttons.*

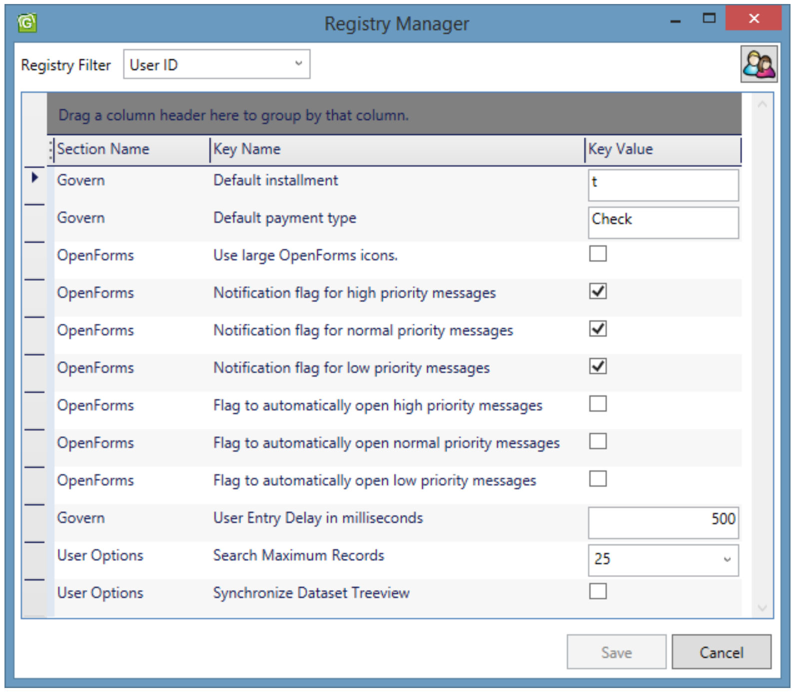
Options Button



The Options button is located below the Suite button, and is the primary location for User Configuration. Settings. This is a drop down menu button that does not use an icon. This is location of the User Registry form.

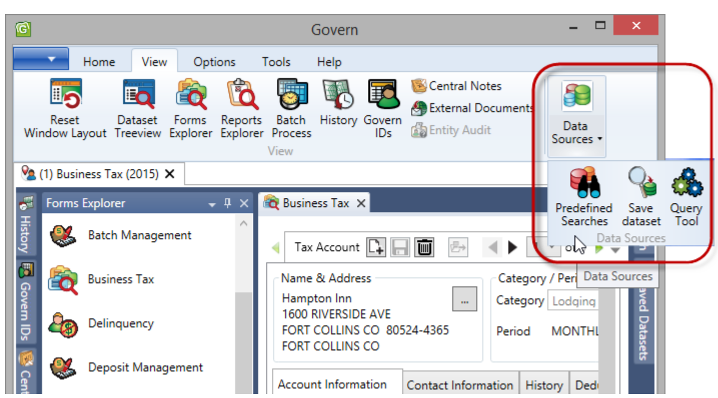
Registry Manager

The Registry Manager form contains User Registry parameters that are used to modify elements of the Govern user interface. Modifications include control of the maximum numbers of search records retrieved, and the behavior of *Global Message* notifications.



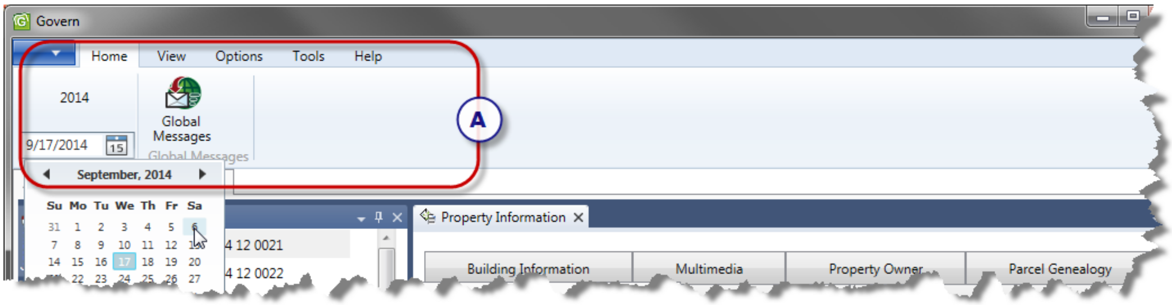
Grouping of Govern Ribbon Icons

NEW! A new behavior is now observed when there are multiple Ribbon icons in an icon group, as the UI window is reduced in size, the icons within the group will be combined into a single icon. There w with a drop down down group containing all icons within the group.



This behavior will allow the application UI to be flexible when screen resizing occurs.

The Ribbon



The Govern Ribbon (**A**) consists of menu tabs that allow you to configure the application through principal areas of the program.

- **Home -** Access to applications settings, system clipboard, and system flags.
- **View** - Display Govern panes and embedded applications.
- **Options** - Control Query results and modify interface appearance.
- **Tools** - Access MSGovern .NET applications and other configured external applications.
- **Batch Process -** This menu tab will provide access to Govern batch processes.

Home tab

Global Information group

Fiscal Year: This is the *Current Year* (**CurrentYear**) or fiscal year that is used by the department. This is the *Current Year* as determined by a setting requested by the user; this value can be changed.

Each department within an organization may have to define and work in a different fiscal year. For example, *Building Department* profile users can work in the current calendar year when maintaining data on *Permits and Licenses*, *Tax Collection* department users work with data from the previous year, but *Property Assessment* department profile users may have to create appraisals for a future year.

Note: This field must be modified manually when the department changes to a new fiscal year. *See Fiscal Year in the GNA guide.*

The *Fiscal Year* parameter is found under the **Home** tab of the Ribbon; if not visible, the ribbon is probably minimized. Right click and select the *Minimize Ribbon* option.*See Minimizing the Ribbon on page 49*.

Changing the Fiscal Year (Current Year)

To change the **Fiscal Year** in the ribbon...

1. Perform a query; for example, in the Property Control profile perform a search based on P_ID and copy the results to the Dataset Treeview
2. Click to select the Dataset Treeview pane at the bottom of the interface.
3. In the Ribbon, click the current year; the auto-hide History pane will slide out.
4. In the year column, double click on the desired year.

Alternatively, the date can be selected from the Date Picker directly below the in the

In the History pane, only the years with data available will be present in the grid.

Data Record Icons

Icon	Details
	**Active -** This record is active during the current record year.
	**Active and Selected -** Record is active during the current record year. The information for this record is being displayed in the entity.
	**Inactive -** The data record may be selected, but can’t be manipulated.

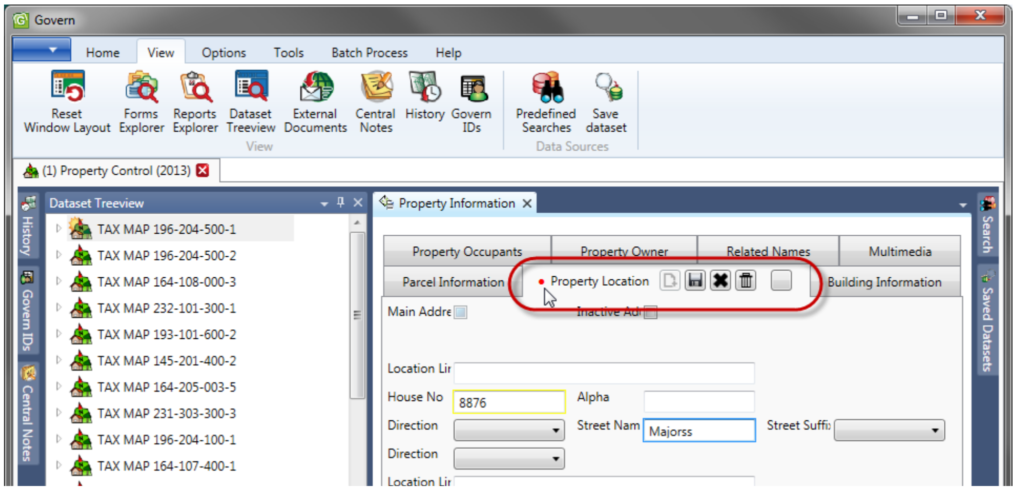
Common Features

Visual Notifications

In Govern there are visual cues that are presented to the user that indicate the status of their data. These cues appear in the form of colored dots or borders at various locations within the application. The grid below contains a list of the types of visual cues that are observed. Samples are observed after the table below.

Type	Color	Location	Description
Dot	Red	On a form tab	Error in Validation or Query on form. A modification has occurred.
Dot	Blue	End of form field	The field is in error.
Border	Blue	Form fields	Indication that this is the active field.
Border	Yellow	Form fields	The field contains “Dirty” data; i.e. the information has not been saved.
Border	Orange	Form fields	Warning; unsaved change.
Border	Red	Form fields	Error in Validation or Query on form.

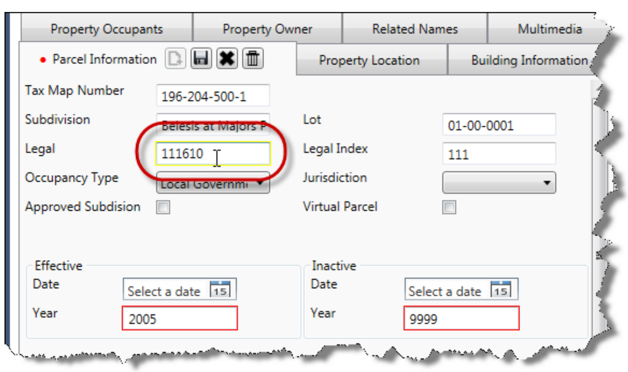
Modified Forms (Red Dots)



In the application, the red dots that appear on the tabs within a profile. An entity within the current form has been modified, but has not yet been saved. When changes to the form have been saved, the red dot indicators will disappear as confirmation.

Field Indicators

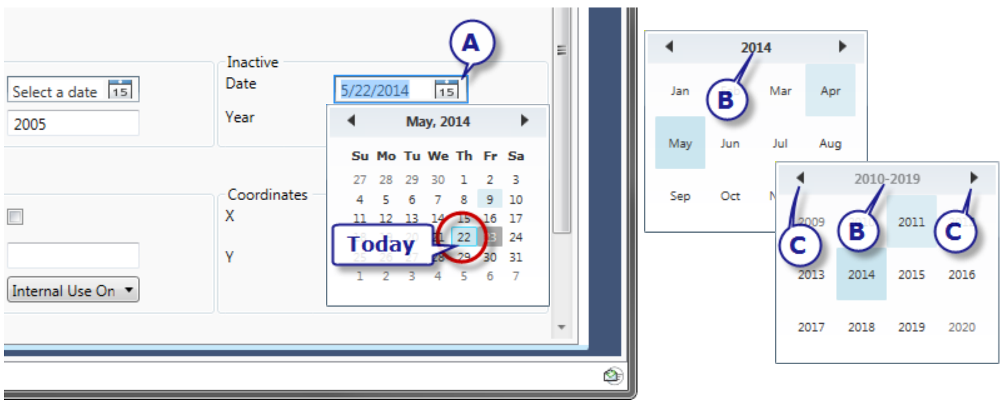
Modifications made to a field, e.g. a change to a value, cause the field in question to be highlighted with a yellow colored border.



Note the fields that appear with a Red border. These fields are in an error state, either as a result of a validation or a query.

Date / Time Picker

In *Govern*, a **Date /Time Picker** is used to select a date and time. Click the *Calendar* icon that appears within a parameter to select a date from the drop-down menu (**A**). This displays the calendar; if the current date and time are required, click on the highlighted blue current date. To navigate to future or past dates, click the year at the top of the calendar (**B**). Alternatively, you may also use Forward and Backwards navigation arrows on the top of the calendar (**C**).



When the *Fiscal Year* is selected, the *Dataset Treeview* will display all valid records. Note the different icons that are a visual indicator of the status of the parcels.

Frozen Records

Frozen Records are snapshots of data records prior to when a modification was made to the record. *Frozen ID*'s are identifiers of the modification status of a record.

Frozen ID: This is a status indicator field; the status of the current record is indicated by the number displayed in this field. The following is an indication of the assignment of frozen ID's:

Record Status	Assigned Frozen ID
Current Year Record	0
Sales Record	1, 2, 3, 4,...
Closed Year Record	-1
Audit Record	-2, -3, -4, -5,...

Record Status	Assigned Frozen ID
Simulation Data	32,767
Split Merged Data	32,766 and lower; e.g. 32,765, 32,764, 32,763...

Simulation: Click the Simulation icon to enter simulation mode. When you are working with simulation data, the number 32767 is displayed in the **Frozen ID** field on the *Ribbon*.

Note: This option is valid in the Mass Appraisal Profile only

Organization: This is an informational field that indicates the organization that the application is registered to.

Current Date: This is the current date of the system. This value is taken from the system clock. This value is also used as a reference for establishing an initiation point for actions such as payments.

WARNING: Users should note that when making entries that are dependent upon the current date, ensure that the Year of the **Current Date** is identical to that of the **Fiscal Year**. This will ensure that the data records displayed are a true reflection of the current date that is required.

Clipboard group

In the Clipboard are the basic editing functions of *Copy*, *Cut*, and *Paste*.

Copy: When a parameter or text in a text field is selected, click **Copy** to copy the selection to the Windows Clipboard.

Note: The **Ctrl + C** keyboard cobination may also be used to perform a copy operation.

Cut: Make a selection in a parameter or a text field; click **Cut** to cut the selection to the *Windows Clipboard*.

Note: The **Ctrl + X** keyboard combination may also be used to perform the cut operation.

Paste: Place your cursor in a parameter or text field, click **Paste** to paste the content of the Windows Clipboard into the parameter or field.

Note: The **Ctrl + V** keyboard combination may also be used to paste.

Note: When attempting to paste data from the clipboard into a parameter, ensure that the data types are compatible, i.e. you cannot successfully paste text data into a parameter that only accepts date or time information.

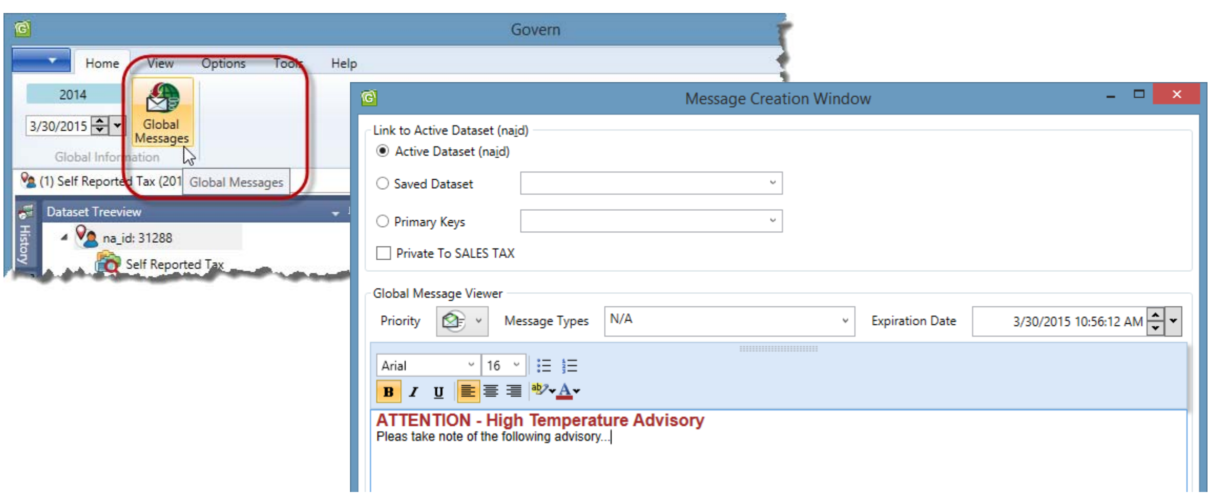
Global Information group

The *Global Messages* group allows the creation of *Global* or *Department* messages that will be displayed when a selected record is accessed. Previously the messaging system was based upon a PARCEL ID (P_ID). This current implementation of the messaging system is based upon both the User ID (USERID) and the Parcel ID (P_ID) for greater flexibility. For example in the *Self Reported Tax* (ST) module, a notice of delinquency message can now be sent to the account holder by associating the message with the USERID.

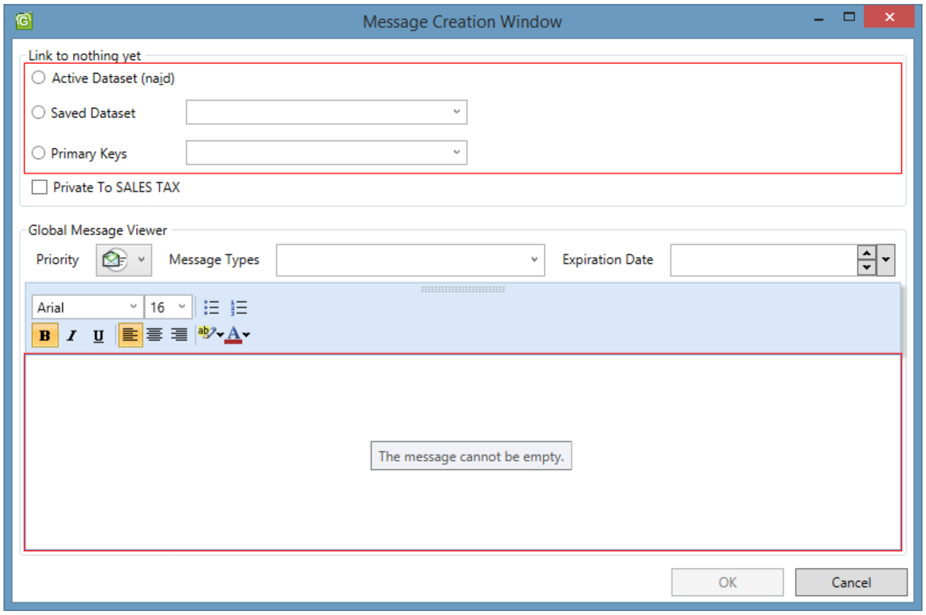
Note: This feature replaces the Global or Department Flag.

Global Messages

Click *Global Messages* to create and attach a message to a current record or dataset. The message is created in the *Message Creation Window* form. These messages can be assigned a priority and made private to a department or a primary key.



The *Global Message* form appears un-initialized, i.e. required fields have a red box around them (**A**).



As soon as an association is made with the message to a record or dataset, the red outlines disappear.

Global Message form parameters

Link to ... group

> **Note:** The title for this group will be dependent upon the Primary key that is selected for the message to be based upon; *see* **Primary Keys** *below.*

Active Dataset (pid): Select this option to attach the message to the activedataset, i.e. the dataset obtained from the result of a search.

Saved Dataset: When a datset is saved, it can be accessed by selecting it from the drop down menu. The message will then be attached to the selected dataset.

Primary Keys: This option when selected will allow you to attach the message to one of the following *Govern* primary keys:

- Parcel ID (P_ID) - Parcel identification number for the property
- Name ID (NA_ID) - The Unique identification number of the current Name
- Building ID (BLDG_ID) - Unique identification number of the current building.

- User Key ID - This is the unique user key identification.
- Year ID (YEAR_ID) - Year identification of the current record.

Private To...<department>: This option is used to specify that the current message is private to the selected department. Note that "**<department>**" is a variable that corresponds to the department that the user is registered to.

Global Message Viewer group and Priorities

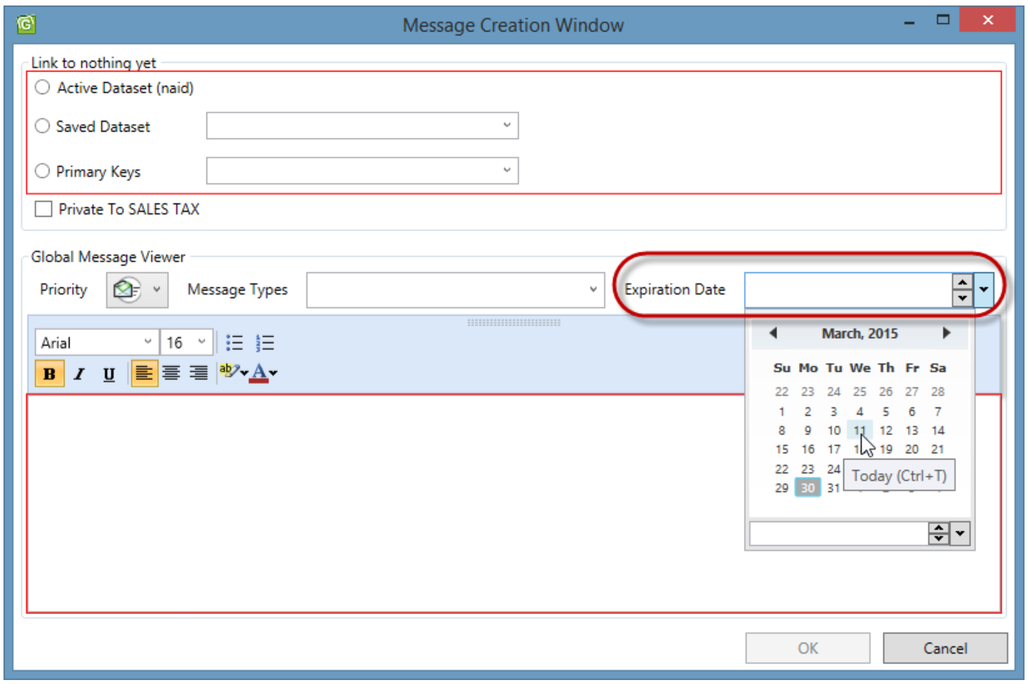
Priority: Select from one of three (3) priority levels that can be assigned to the messages. Priority levels are as follows:

-  **Low** - Use this priority setting for low level messages that do not require immediate attention. An example of a Low priority message might be
-  **Normal** - These are the day to day administrative notices that are not so critical that they would be assigned a high priority, but attention is required. An example of a normal priority message might be a note to inform users of a parcel that was recently split through a Split/Merge/ Remap process.
-  **High** - These are the high priority/critical messages that require immediate attention. Examples might be a "*Boil tap water notification*", or a "*High heat notification*".

Message Types: This is an informational, user-definable field that is populated from the VT_USER.MSGTYPE table. Users can define options like, **For Your Eyes Only**, **Immediate Attention Required**, etc.

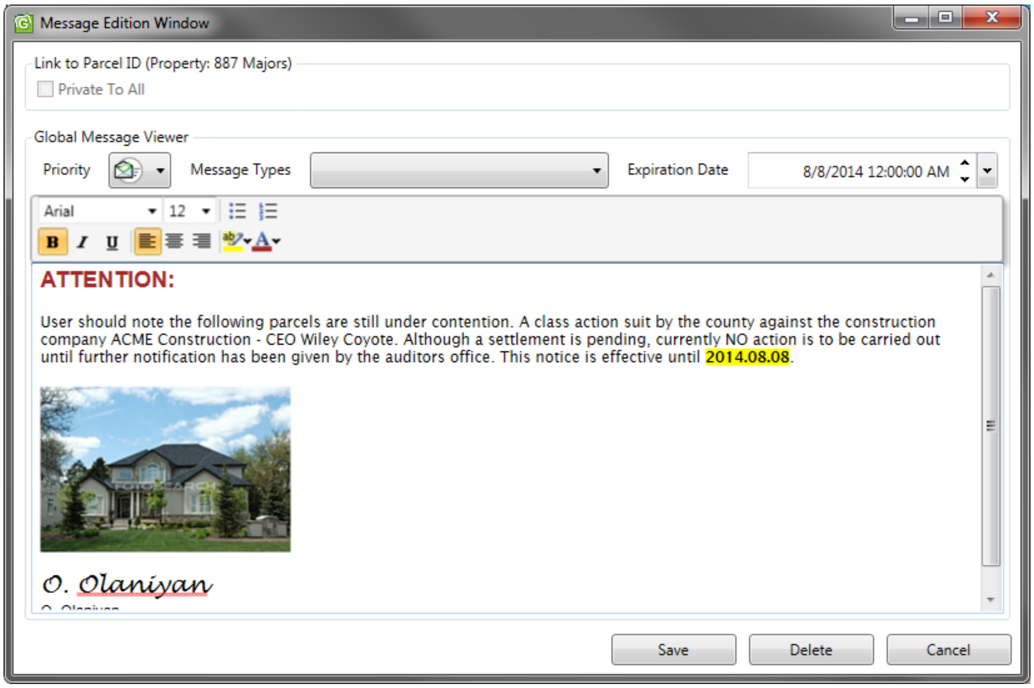
Note: Options that are displayed in Message Type field will need to be defined by the user in (Table: VT_USER), MSGTYPE column.

Expiration Date: Enter the last day and time to display the message if required. This is useful for messages that need to be displayed for a set period of time only. Use the Date / Time Picker to specify the expiration date. With an expiration date, it will not be necessary to remove the messages manually.

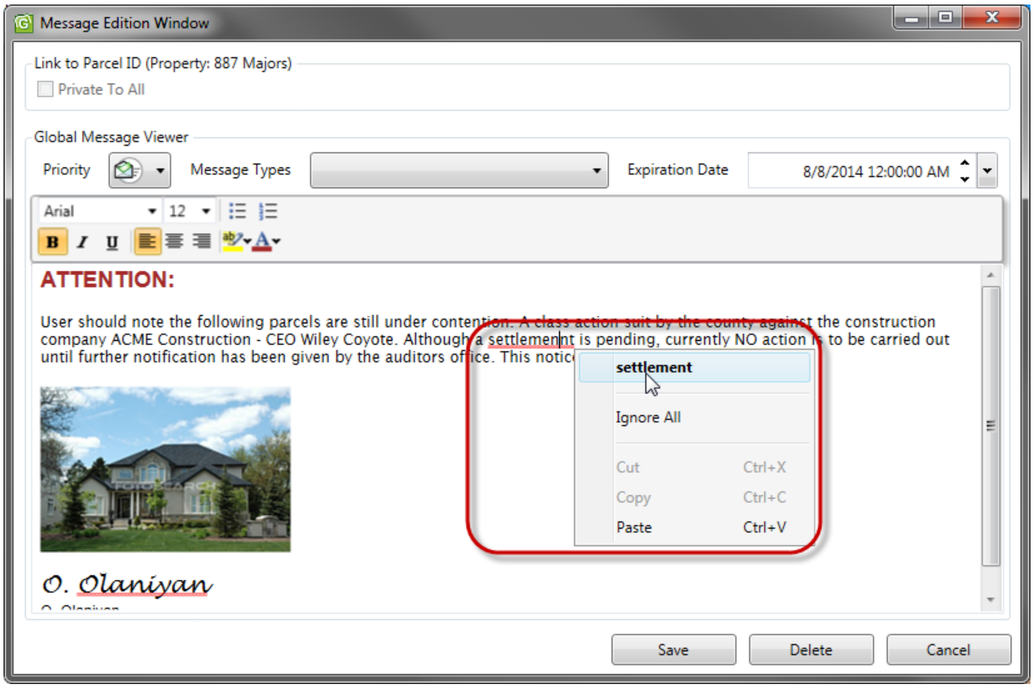


Global Message - Message Creation Window

The *Message Creation Window* interface provides several formatting tools to add embellishments to the message. The message body supports *Rich Text Format* (**RTF**), as a result system typefaces and formats can be used on a message. In addition, images may be pasted in to the message through the Windows clipboard. This can be done by copying, **Ctrl-C**, the image from a graphics utility or program, and pasting, **Ctrl-V**, the image at the insertion point. The insertion point would be the location of the pointer.



Word Processing features



Users with *Microsoft Word* installed will have the advantage of the Real-time spelling checker available. As with *Microsoft Word*, a Red underline is used to highlight suspect words. Suspect words can be corrected with a right-click on the word to display suggestions.

Global Message - Command Buttons

OK: Click **OK** to save or update the current message.

Cancel: Click **Cancel** to exit the form without saving your modifications.

Setting a Global or Department Message

To set a *Global* or *Department* message...

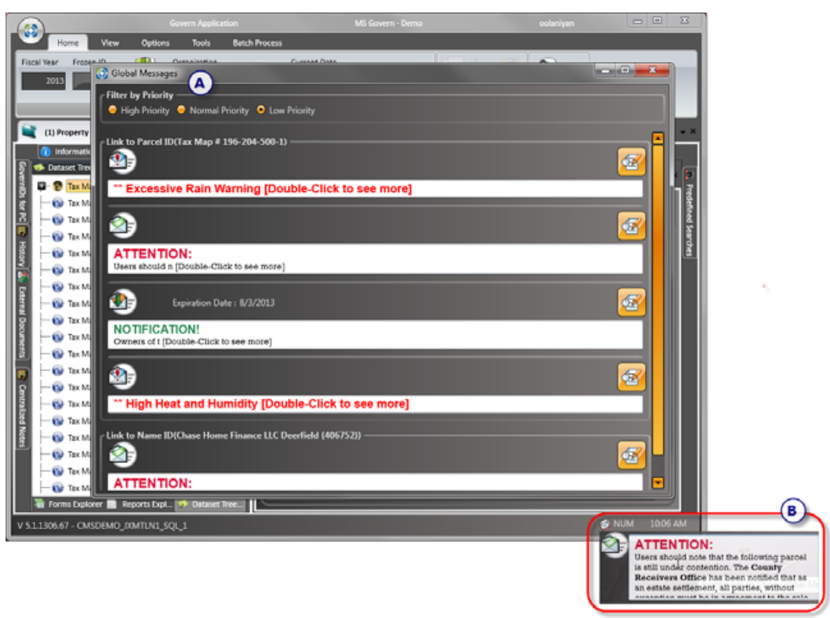
1. Perform a search for a record or dataset.
2. Click *Global Message* on the *Govern* ribbon.
3. At the appearance of the *Global Message* form, make a selection of the required options; select the *Active Dataset* option to apply the message to the current dataset.

4. When a dataset has been saved, it can be selected from the Saved Dataset drop down menu.
5. Select a *Primary Key* from the **Primary Keys** drop down menu. *See Primary Keys on page 19.*
6. If the message is to be private to a department, select the Private To... option.

Note: The PrivateTo <Department>, displays the <Department> that the user is set up for.

7. In the *Global Message Viewer* group, specify the message *Priority*, the *Message Type*, and if required, an *Expiration Date*.
8. In the message body area, enter the message and format with the available tools. Note that images can be inserted through the *Windows Clipboard*.
9. Click **OK** to accept the message.

Global Message Behavior



Records or datasets that have messages attached to them, when accessed and depending on set options, will display a **Global Messages** screen containing a preview of any messages that are related to the record or dataset. The system provides indicators that inform users of messages, i.e. **Global Messages** form (**A**), and **Notification Flags** (**B**). The Govern status bar along the bottom of the application window displays a notification icon in the lower right hand corner. In addition notifications are also temporarily displayed in the Lower right hand side of the Govern application window. The following two *Message Notification* (2) icons can be displayed in the status bar:

Note: When messages are displayed, depending on the number of messages, it is recommended that the

Status Bar Message Indicator Icons

No Message(s) - This indicator when displayed in the tray is an indication that there are no messages attached to the currently active record or dataset. A right click on this icon in the tray will display the following menu option:

- **Create a New Message** - Use this option to create a new message.

Message(s) waiting - This indicator when displayed in the tray is an indication that there are messages attached to the currently active record or dataset. Depending on the setting of the behavior setting of the User Registry A right click on this icon in the tray will give two menu options:

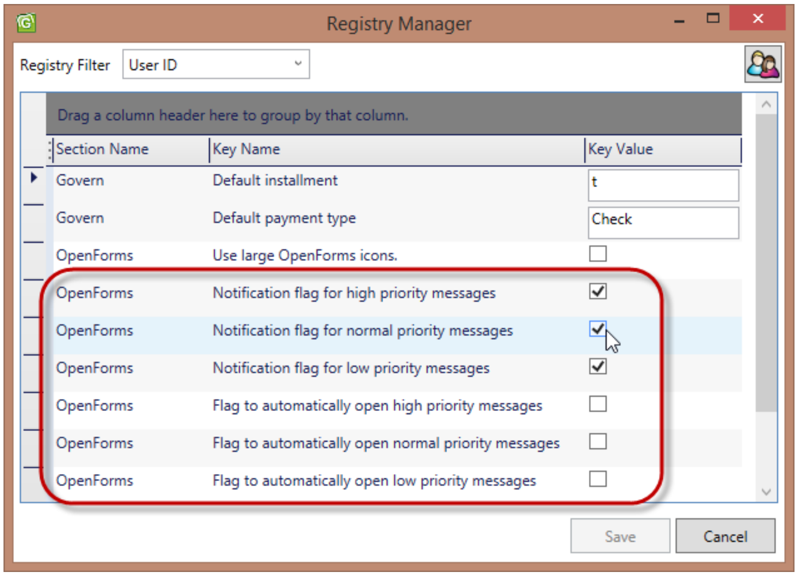
- **Create a New Message** - Use this option to create a new message.
- **Tell Me Again** - Select this option to repeat the display of the messages.

Note: Messages will not be displayed again if notifications have been disabled in the User Registry form. *See Global Messages and the User Registry below.*

The manner in which the messages are displayed are user definable through the *User Registry* form.

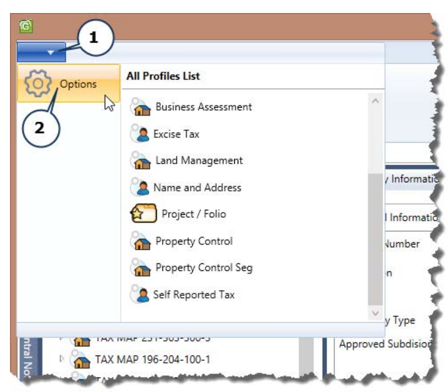
TIP: A double click on the *Message indicator* icon will force the display of the Global Messages form and all related messages. Use the Filter by Priority options to control the messages that are displayed.

Global Messages and the User Registry



As indicated above, the behavior of Global Message notifications can be controlled in the User Registry. The Registry Manager form, offers users the ability to control how notifications are presented.

Registry Manager Options for Global Messages

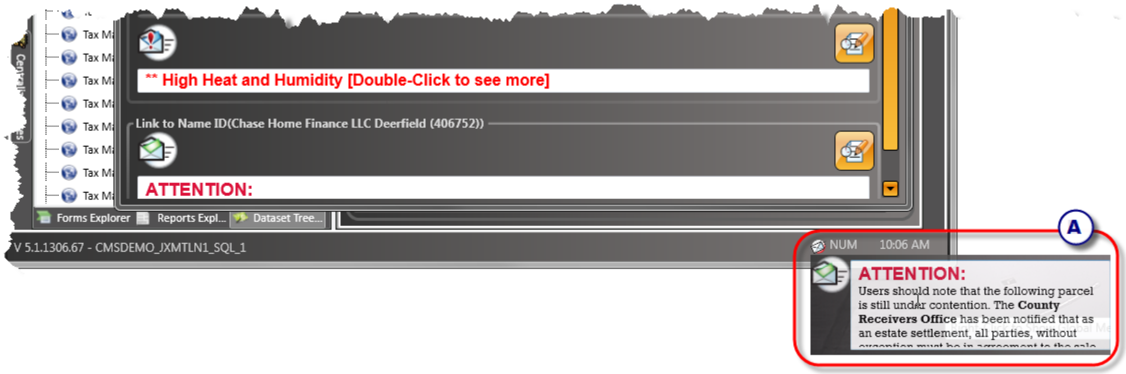


The following user registry keys are the options that are used to control the presentation of notifications. The *User Registry Manager* form is accessed through the Govern application interface.

To access the User Registry Manager...

1. In the Govern interface select the Options button (**1**) > Options (**2**).
2. In the Registry Manager form, make the required selections.

Displaying Notifications



Notifications are displayed in the form of flags that are displayed in the lower right hand corner of the Govern application window. These flags are displayed briefly, i.e. 2-3 seconds, and fade away. This method of display is to catch the users attention. If a notification is missed, they can be displayed again through the **Tell Me Again** option in the status bar notification icon. *See Status Bar Message Indicator Icons on page 25 for details.*

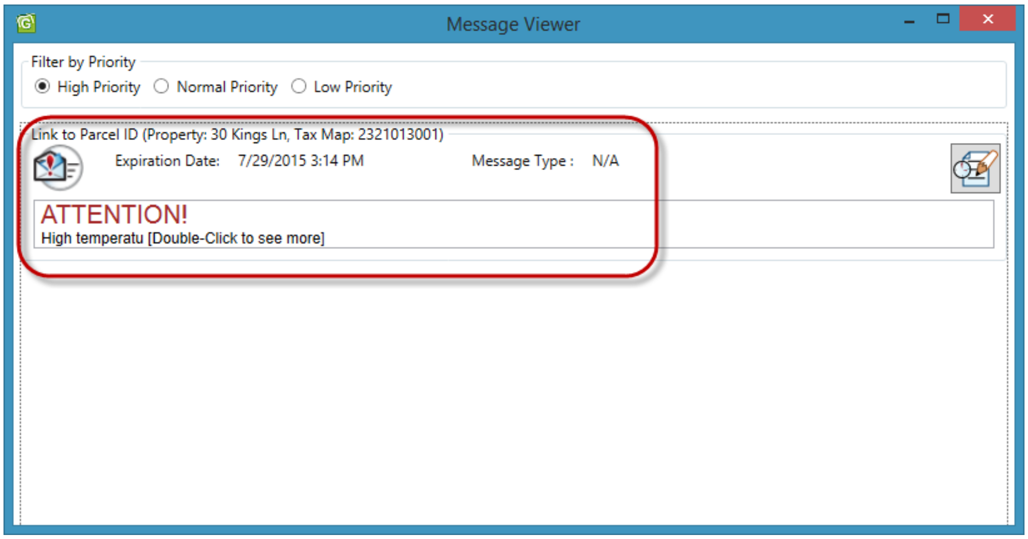
Notification Flag for High priority Messages: Select this option to display only *High Priority* messages as notification flags.

Notification Flag for Normal priority Messages: This option should be selected to display Normal or higher Priority messages as notification flags.

Notification Flag for Low priority Messages: When selected, this option will display *Low* or higher *Priority* messages as notification flags.

Note: Selecting this option is the same as selecting an option to display notification flags of messages of all priorities in the *Global Messages* form.

Flag to automatically open High priority Messages: This option, when selected, will display only High Priority messages in the *Global Messages* form.



Flag to automatically open Normal priority Messages: This option, when selected, will display only Normal or higher Priority messages in the *Global Messages* form.

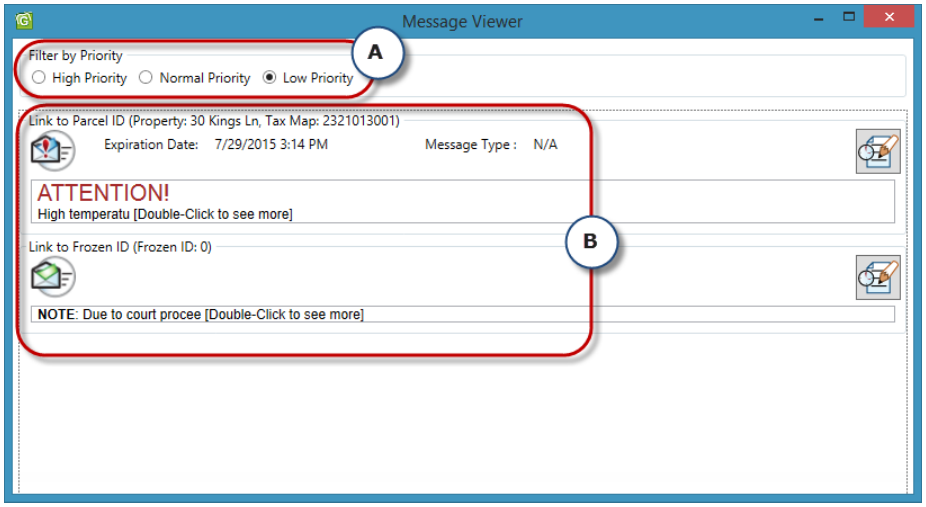
Flag to automatically open Low priority Messages: This option, when selected, will display Low or higher Priority messages in the *Global Messages* form.

Note: Selecting this option is the same as selecting an option to display messages of all priorities in the *Global Messages* form.

For a better understanding of how priorities associated with messages are displayed, *refer toGlobal Message Viewer group and Priorities on page 20*

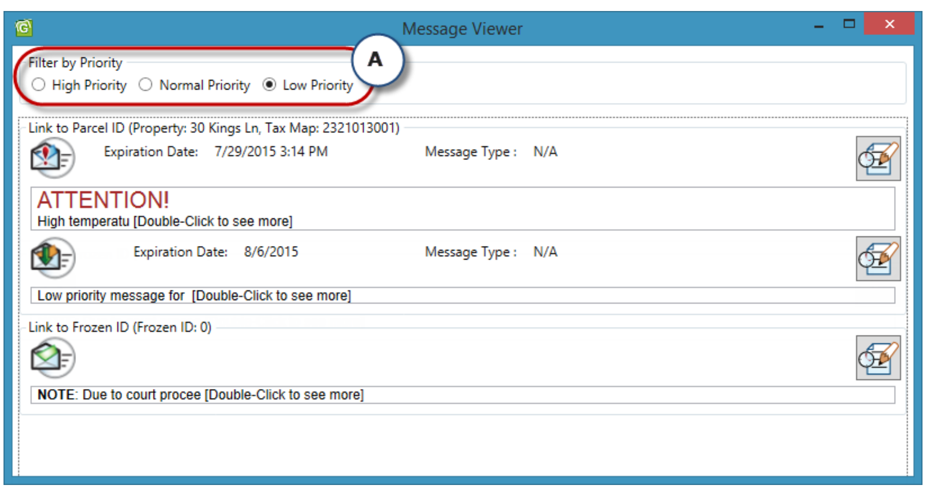
Global Messages form

Selecting a record with a message attached to it will invoke the *Global Messages* window. This window is divided into two (2) principal sections, the **Filter by Priority** group (**A**), and the **Active Messages** area (**B**).



Note: When there are multiple messages, they will be displayed sequentially below the **Filter by Priority** group; it may be necessary to scroll through a list of messages.

Filter by Priority

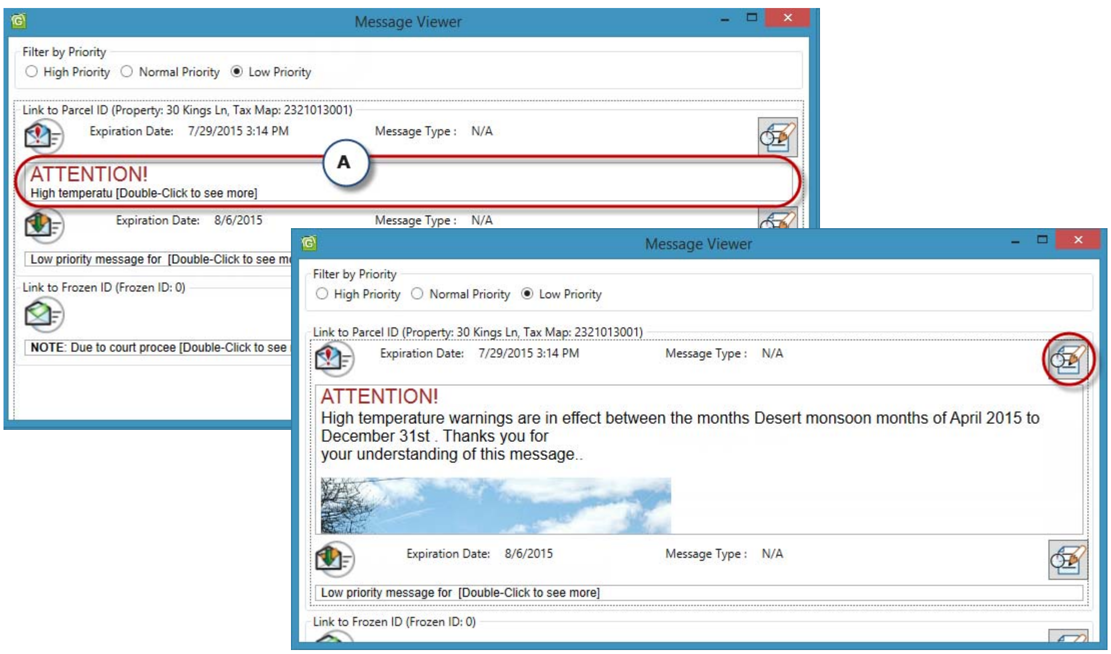


The *Filter by Priority* group allows users to control which messages are displayed based upon the message priority setting.

- **High Priority** - When this option is selected, only messages set with a High Priority are displayed.
- **Normal Priority** - Select this option to display only messages with a priority of Normal Priority or higher, i.e. Normal and High Priority messages.
- **Low Priority** - If this option is selected, all messages with a priority of Low or higher will be displayed; select this option to display all messages

Message Preview

Messages that are displayed in the **Global Messages** windows are displayed in a preview mode that displays the first two lines of the message that is appended with the words **[Double-Click to see more]** (**A**).

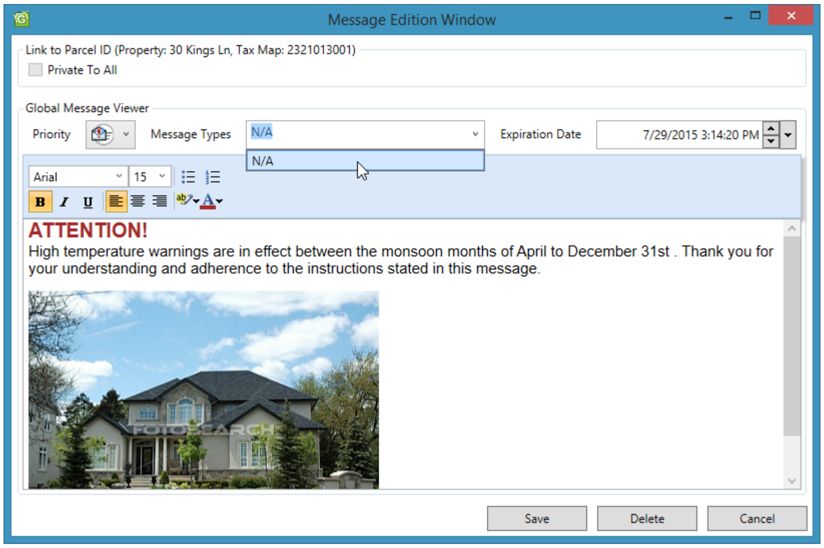


To display the expanded message...

1. Place you mouse pointer over the message area and double-click in the area to expand the message.
2. A second double-click on the message will return it to the two line preview mode.

Editing an existing message

When a message is displayed, with sufficient permissions, the message can be edited.



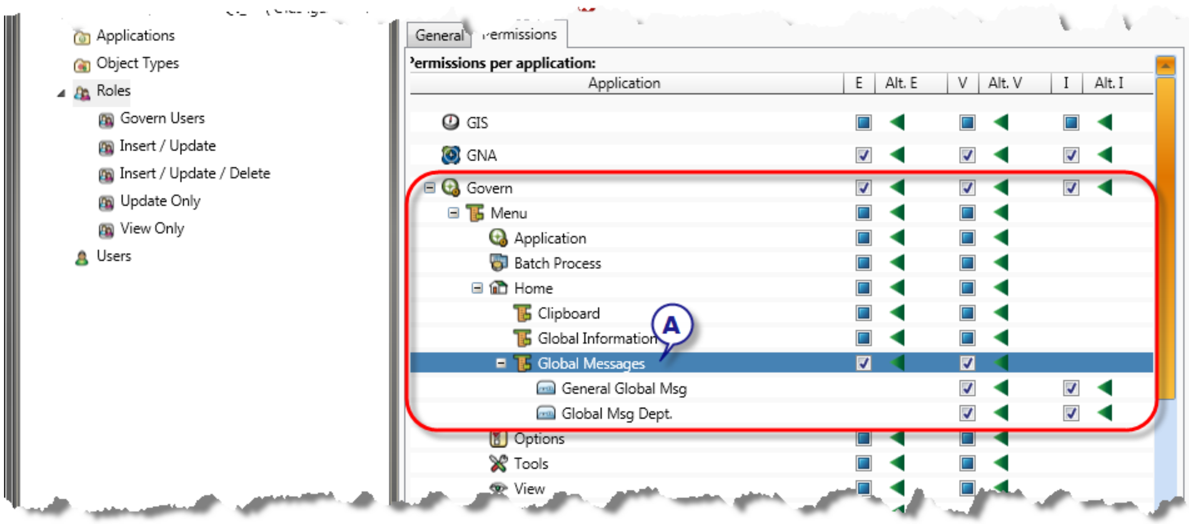
To edit an existing message...

1. In the *Global Messages* preview form, there is an **Edit Message** button; click *Edit Message* to display the full *Global Message* form.
2. Make any required changes to the message; e.g. *Priority*, *Expiration Date*, etc.
3. Click **Save** to accept the change(s).

Securing Global Messages with the GSM

As with similar *Govern* features, the *Global Message* system has a component that is administered through the *Govern Security Manager* (**GSM**).

Security Rules



The Global Message (**A**) system is secured at two (2) levels:

- **System-wide**, i.e. messages that are directed to all users of the Govern system.
- **By Department**; these are messages that are localized to a specific department.

Each of the above levels has an additional level of security that is associated with it. These message types can be further qualified as Global, or Private.

- **Global** – A Global Message…
- **Private** – Messages that are specified as Private…

For details regarding the configuring of these options, refer to the Govern Security Manager (GSM) release 6.0 user guide.

View tab

The View group

The view group is used for quick navigation back to any of the explorer panes that are selected, regardless of which forms are open.

Reset Window Layout: In working with the application, users will occasionally rearrange or resize panes. When the application is closed down, the positions of the windows are saved. To reset them back to the default positions used at the point of install, click **Reset Window Layout**.

Dataset Treeview: Datasets that appear in the Dataset Treeview are populated with the results of searches made through the Search form. Records that are loaded into the Dataset Treeview may be appended to through the Saved Dataset pane, or deleted directly in the treeview pane.

Forms Explorer: Click the Forms Explorer to display the list of OpenForms™ that are in the currently open profile.

Reports Explorer: When profiles are configured with OpenForms™, reports may also be included. Click Reports Explorer to display the list of reports that are configured with the profile. *See Reports Explorer on page 65 for details about Reports.*

Batch Process: Click to display the Batch Process Explorer containing available Batch processes.

History: The History panel allows for quick navigation of historical data records (Years and Frozen ID's) that are associated with the currently selected record (Table: MA_MASTER, TX_RE_ASSESSMENT). Historical data allows you to view data from previous years, however, you cannot modify or delete the data.

Govern ID’s: Users of the *Property Control* profile can display the Govern ID’s that are associated with each record. When enabled, the **Govern ID’s for PC** tab is displayed in *auto-hide* mode on the left hand side of the user interface. To display the tab, place the mouse cursor over the tab to expand it. The information provided under this tab can be useful for developers as it provides the ID information that are used and not used in the *Business Entity*.

Central Notes: The Central Notes system is designed to allow users to enter and store notes in a central storage location at the business entity or attribute level.

External Document: *In development.*

Entity Audit: The audit trail is a standard feature in the Govern OpenForms technology. When turned on, changes to entities are audited and user changes (Add-Delete-Modify) are recorded. Details such as **When** the change was made, **Who** made the change, **What** the previous setting was, and so on are displayed in the **Entity Audit** form. It is recommended that this feature be enabled for sensitive data. (Table: **USR_AUDIT_OPENFORMS**).

Note: The Entity Audit screen can be displayed with the (**Ctrl + H**) keyboard shortcut.

Data Sources group

Predefined Queries: Click this icon (**A**) to display the *Information & Predefined Queries* pane (**B**). By default, this pane displays the tax map number, owner name and address, occupant name, mailing index and property location, as well as data from the open *Business Model*. This data can include permit and license certification, registration or application numbers, inspection date and time and the utility billing account number. If *Coolbar Queries* were created in *Govern for Windows Admin*, they will be translated to *Predefined Queries*.

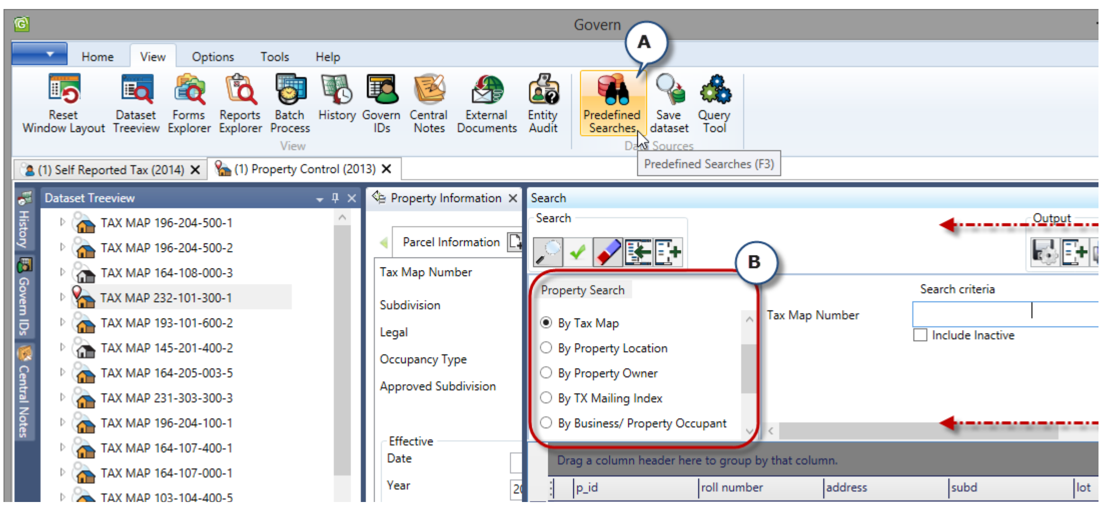
Central Notes: The *Central Notes* system allows users to enter and store notes in a centralized storage location. Central Notes allow users to maintain, and review, any notes that are entered when an action is performed, or when a modification is made. *See Central Notes on page 98 for details.*

Data Sources group

The Data Sources group is a collection of utilities and, when installed and access granted, embedded *Windows Presentation Foundation* (**WPF**) applications that are closely integrated with *Govern*.

Predefined Searches

When clicked, the Predefined Searches (**A**) icon will display a auto-hide window or Search Form containing default searches for the profile. The form parameters will correspond with the type of search selected (**B**).



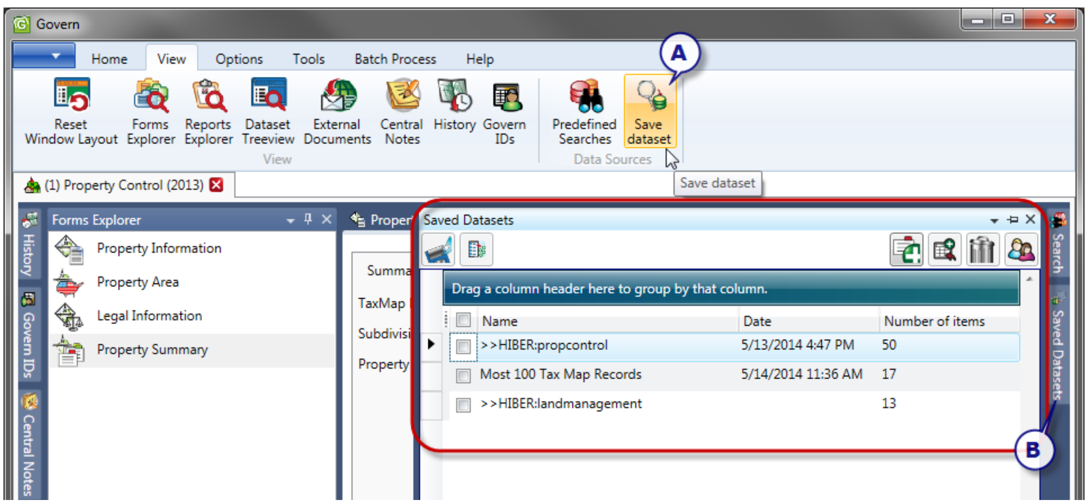
For Example: Default Predefined Searches for the Property Control Profile will include Property Search criteria by...:

- By Last 10 Accessed Parcels
- Parcel ID
- Tax Map
- Subdivision & Lot
- Property Location
- Property Owner

- By Tax Mailing Index
- Business Property Occupant
- Related Name
- By Subdivision & Lot
- TX Mailing Index
- From PC_External - This Search through data in the system exchange table (Table: PC_EXTERNAL)

Saved Datasets

Click the Saved Datasets icon to display a auto-hide form/toolbox (**B**) that allows for the retrieval of records, collection of records or datasets from the database,. *See Govern Saved Datasets Pane for details about the interface.*



Govern Embedded Components (...when installed)

When installed and security access has been granted, optionally on the Ribbon in *Govern* are application icons that are integrated with *Govern*. These could include the *QueryTool*. *The QueryTool is also available as a standalone application from Govern.*

GIS

If installed and configured, click *GIS* to launch the embedded *GIS View* component. This is a visual query and parcel selection tool that uses WPF mapping controls. *Refer to the Govern GIS View user guide for configuration information.*

QueryTool

The *Query Tool* is an integrated database query application that allows you to build customized *Standard Query Language* (**SQL**) queries with a drag and drop *Grahical User Interface*. *See QueryTool Component interface on page 117 for details.*

Save and Append Datasets

Select this option to save the records retrieved as a result of a query. These query result records can be recalled at a later time for continued updating. In addition, any new results can be appended to an already existing saved dataset. *See Saving Search Results on page 84, and Appending to a dataset on page 85.*

Options tab

Under the Options tab are parameters to modify the Govern interface, and control search query results.

Options group

Skins

The “Themes” refer to the display color of the Govern interface. Click to select one of the three (3) options, *Blue, Black*, or *Classic*.

Access Govern Themes

Note: Theme settings are saved; when you quit and reopen the application, your chosen Theme color will remain until a new Theme is selected. The default Theme of *Govern* is determined by the administrator when the deployment is set up in the *DeployEZ™ Publisher*.

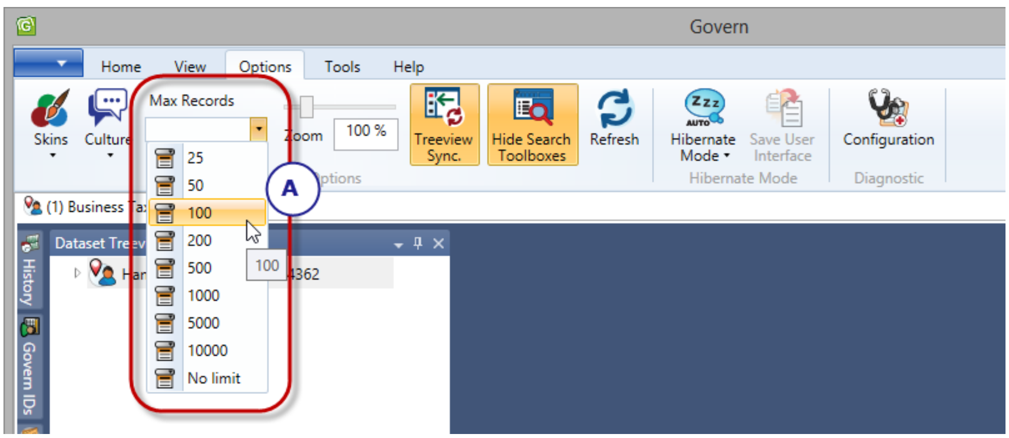
Culture

The *Culture* option allows you to specify the working language of the interface. Available options are, *English (United States), English (Canada)* or *Francais (Canada)*.

Note: The default language of *Govern* is determined by the administrator when the deployment is set up in the *DeployEZ™ Publisher*.

Max Records

Searches, when successful, can return numerous records. These records can slow down a system when they are displayed in the *Search Result* pane of the *Predefined Searches* form. It is possible to control the number of results that are returned from the search. In the **Max. Records** (**A**) drop down menu, you can select the maximum number of records to be displayed in the query result pane.



About Maximum Records

When a Max. Record value is selected, only the first specified number of records are displayed, i.e. a Max. Record of 25 will display the first 25 records returned by the database. This does not mean that there are no more records; in fact there are often more records, they are simply discarded.

To limit search results from the *Options* tab (**A**) in the *Ribbon*.

1. Select 50 from the **Max. Records** drop-down menu.
2. Click the **Predefined Searches** tabs on the right hand side and perform a search.
3. A maximum number of 50 records is retrieved and displayed at the bottom of the search screen.

For more details about searches, see Searches Predefined Searches (The Search Interface) on page 73.

Zoom

The default font size in the *OpenForms* profiles may not always be suitable to some users. In some instances, there is an advantage to increasing or decreasing the font size of the interface. The **Zoom** feature is one that allows the user to be able to magnify all *OpenForm*'s. Areas that are magnified include fonts, fields, tabs and the buttons on the interface. The level of magnification is indicated as a percentage value directly below the slider. The default magnification can be restored with a click on the restore button.

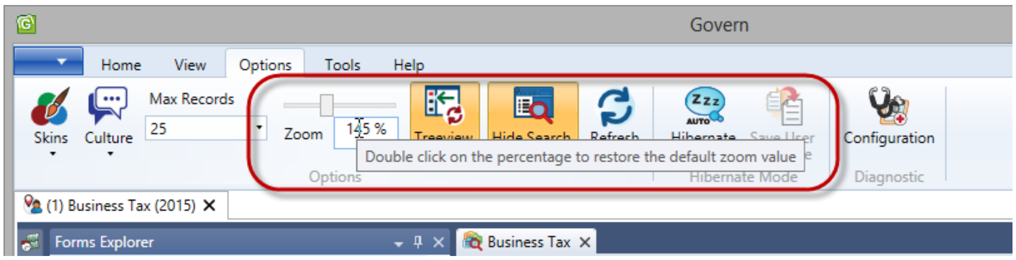
Note: The setting of the zoom feature will remain in effect until it has been changed by the user; closing down the application will not reset the zoom.

To change the magnification of the forms...

1. Click the options tab on the ribbon.
2. In the *Zoom* section, click and drag the slider (**1**) towards the right, to increase the magnification of the form, or towards the left to decrease the magnification; note the change in magnification (**B**).

Resetting the Zoom

3. To reset the zoom double click in the field that the Zoom percentage is displayed



Treeview Sync.

NEW! In Govern for VB6, external tables (PC_EXTERNAL, NA_EXTERNAL, and PM_EXTERNAL), were used by external applications and reports to automatically know the current recordset and currently viewed parcel, and as a means of data exchange. In Govern release 6.0 and upwards, these external tables are being phased out and the functionality provided by them have been reproduced with the **Treeview Sync.** feature.

The Treeview sync. feature saves the contents of the current profile in (Table: USR_SAVED_DATASETS) with a "Saved Dataset" name of "AUTOSAVE" under (Column: USR_SAVED_DATASETS.SAVED_SET_NAME). Should a profile be changed, the dataset loaded in the Treeview will be automatically synchronized to (Table: USR_SAVED_DATASETS).

This feature recreates the functionality provided by the three (3) external tables that were used in Govern for Windows, (Tables: PC_EXTERNAL, NA_EXTERNAL, and PM_EXTERNAL). For example users could run a batch process on a saved external dataset as opposed to a set range.

Note: In release 6.0 a simultaneous save will be made to (Table: PC_EXTERNAL) and (Table: USR_SAVED_DATASETS), Tables NA_EXTERNAL and PM_EXTERNAL are no longer supported.

- PC_EXTERNAL (Supported in release 6.0; not supported in release 6.1)
- NA_EXTERNAL (Not not supported in release 6.0 and 6.1)
- PM_EXTERNAL (Not not supported in release 6.0 and 6.1)

In release 6.1, all three (3) tables PC_EXTERNAL, NA_EXTERNAL, and PM_EXTERNAL will no longer be supported.

Hide Search Toolboxes

This is a User Interface (UI) feature that will disable the default behavior of a persistent Search Toolbox. Typically, after performing a search followed by a Load action, you have to click on a form, or Tree view pane to hide the Search Toolbox. Now a Load from a Search or a Load from a Saved Dataset will immediately hide the Search toolbox. Exceptions that override this feature are, if after performing a search, you Append to the Tree view, the Search pane will not hide. This feature is enabled through a "toggle", i.e. ON/OFF, button. Options (tab) > Hide Search Toolbox.

Note: This feature has no impact when the Search Toolbox pane is docked, i.e. fixed with the pin icon.

Refresh

The Refresh button is used when modifications have been made to the settings of any of the Govern applications, or changes affecting the database. For example, when changes are made to a Profile, Menu, External Application, or Search objects, a click on Refresh to run the synchronize process would be required. Another instance is when newly created searches are added to Predefined Searches, they will not be acknowledged by the system until a Synchronization has been performed. Other changes that would warrant a synchronization are the adding of new reports, fields, or Business Models to an OpenForm function.

Hibernate Mode group

Hibernate Mode

An area that is critical to productivity in Govern is the user interface and workspace. The Govern Hibernate standard feature is designed to enhance the user experience. Benefits of using the feature are the following:

- Personalization of user interface and workspace.
- Reduced time required to recommence work after restarting the application.
- Increased productivity by not having to re-establish interface setting and searches.

When enabled, the Hibernate feature will create a snapshot of the user work area, save the snapshot, and restore the workspace when the user restarts the application. Interface settings, i.e. Window location and pane settings are stored in (Table: **USR_HIBERNATE**) as an .XML formatted string.

There are three (3) user setting options/states for the Hibernate feature. Hibernate states/options are available as a drop down menu that is displayed with a click on Hibernate Mode in the ribbon.

Options are as follows:

Auto (Default): Auto is the default state of the application. When Govern is installed, the Hibernate Mode will be enabled. Exiting from the application will result in the current workspace being saved.

Note: When Auto is selected, the Save User Interface option cannot be selected.

Note: When there are multiple OpenForm Profiles opened prior to the hibernate process, i.e. save and exit, upon restarting, the last active profile will be opened in the forefront.

On Demand: Select On Demand to give the option to:

- Save the current workspace; saves the current workspace; the current appearance will be restored when the application is reopened.
- Keep previously saved workspace. When you click OK, the previously saved workspace will be saved, i.e. the setting that was displayed when the application was opened.
- Clear Previously saved workspace.

The above three (3) options are user selectable through a dialog box that will appear when exiting the application.

Note: If the dialog box is closed, or the user clicks Cancel, the user will be returned to the application.

Off: When Off is selected, the interface will not be saved. Upon restarting the interface will be reset, i.e. no user panes will be opened, neither will any query results be restored.

Note: When Off is selected, the Save User Interface option cannot be selected.

Save User Interface

A click on Save User Interface in the ribbon will save a snapshot of the user interface/workspace.

Note: The Save User Interface works in tandem with the Govern Hibernate feature. This button is disabled under the following conditions:

- When the Auto option is selected for Hibernate.
- The Hibernate option is set to Off.

Diagnostic group

Configuration

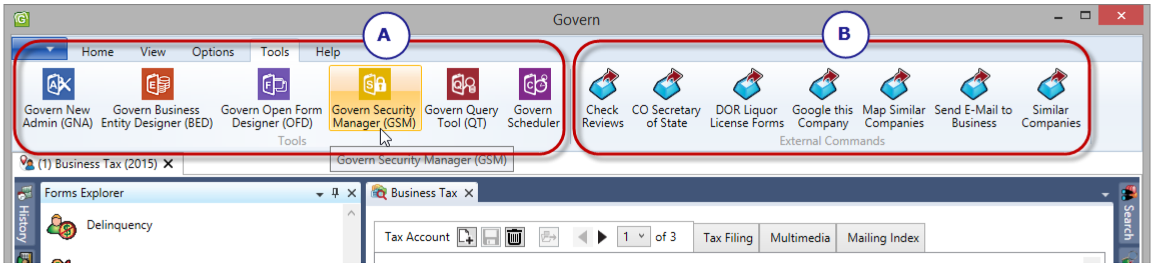
When there are issues with the performance of an application, or queries that are being perceived as “taking too long to complete”, the Diagnostic Configuration form can assist in locating a root cause. *See Diagnostic Configuration form Trace Log on page 137 for details about trace logs*.

TIP: As this is an administrative tool, by default it should NOT be visible; this can be configured through the Govern Security Manager (GSM).

Tools tab

The *Tools* tab contains links to other *Govern* applications. These can be applications that are part of the *Govern* suite or external third party applications compatible with *Govern*

Tools group



The Tools group (**A**) allows you to link to other .NET applications that are in the *Govern .NET* suite.

Note: The corresponding .NET application should be installed on your system to access them.

Govern Net Admin: Click on the *Govern Net Administration* icon to open the *Govern NetAdmin* (**GNA**).

Business Entity Designer: Click on *Business Entity Designer* to open the *Business Entity Designer* (**BED**).

Model Designer: Click on *Model Designer* to open the *Model Designer* (**MoD**).

External Applications group

The external applications that appear in this group (**B**) are configured through *Govern for Windows Admin. Refer to the External Application Setup section of the Govern for Windows Super User guide for details.*

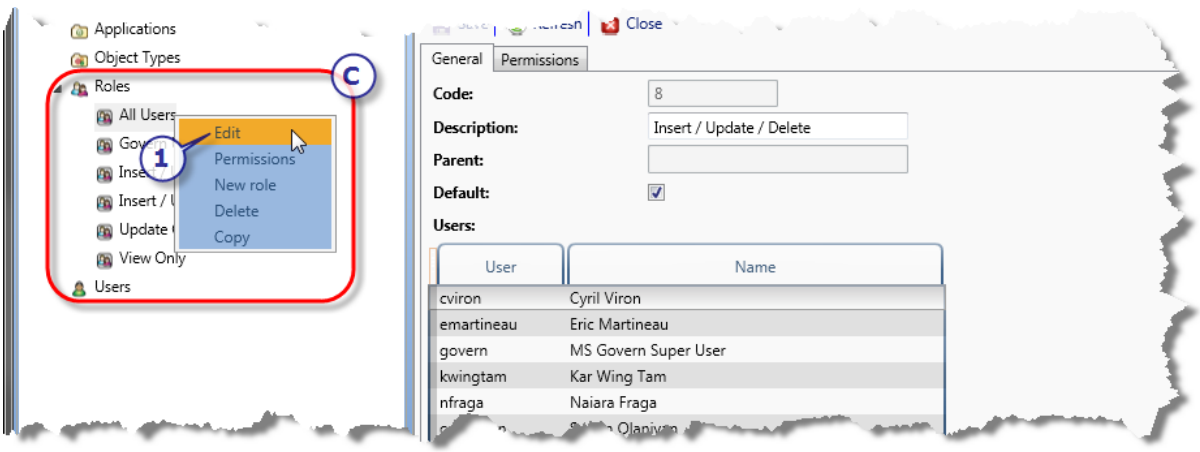
Securing the Tools tab

When it is necessary to secure a user from having access to the *Tools* option, or the *Tools group* in general, you would use the Govern Security Manager (**GSM**).

For the following example we will secure access to the *External Applications* option in the *Tools* group from the user.

To secure through the *Govern Security Manager* (**GSM**)...

1. In the *GSM*, connect to the database using your connection key.
2. Locate the *Roles* icon and double-click to expand it; this will display the list of *Roles* that can be secured.
3. For this example, access will be restricted for users that are members of the **All Users** role.
4. Right-click on *All Users* (**C**) and select the **Edit** (**1**) option.



5. In the *Object Explorers Details* pane, click the *Permissions* tab.
6. Under the *Permissions* tab you wll see the icon for the application, double-click to “drill down”.
7. Double-click on the *Tools* icon.
8. The Menu item that we are looking for is the *Tools* tab; double-click on the *Tools* icon to display the items that appear within the group.
9. Deselect the boxes under the **E** (*Execute*), and the **V** (*Visible*) columns of *External Applications*.

Note: It is only necessary to de-select the **V** option because if the option is not visible, it cannot be selected.

10. When you click to deselect the option, the check box may change to a solid color; this is an indication that the option is now disabled to the user under this role.
11. Click **Save**

After the changes have been saved, the next time any members of the *All Users* role access the *Govern* application, they will no longer see the *External Applications* group.

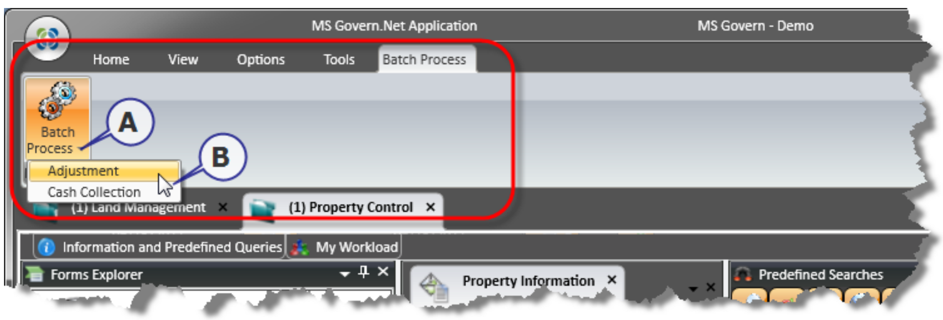
Securing the External Command Group

Batch Process tab

The *Batch Process* tab will give users access to batch processes that have been configured for *Govern.*

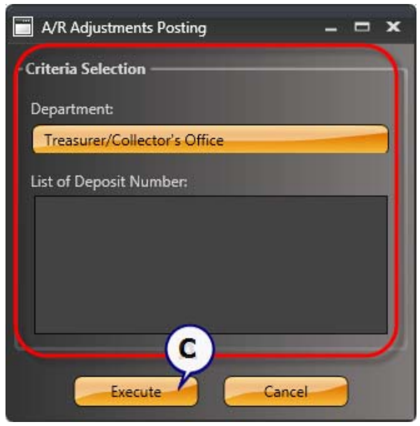
To run a *Batch Process*...

1. Click to select the *Batch Process* tab.
2. Under the tab, click to select the drop down menu (**A**).
3. Select a batch process (**B**)



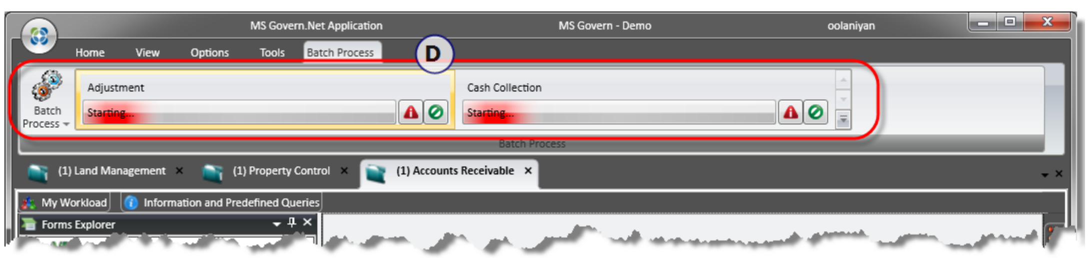
Note: The batch processes that are listed are dependent upon security settings. The displayed list is controlled through the *Govern Security Manager* (**GSM**).

4. A typical batch process will consist of a form with a criteria selection area.

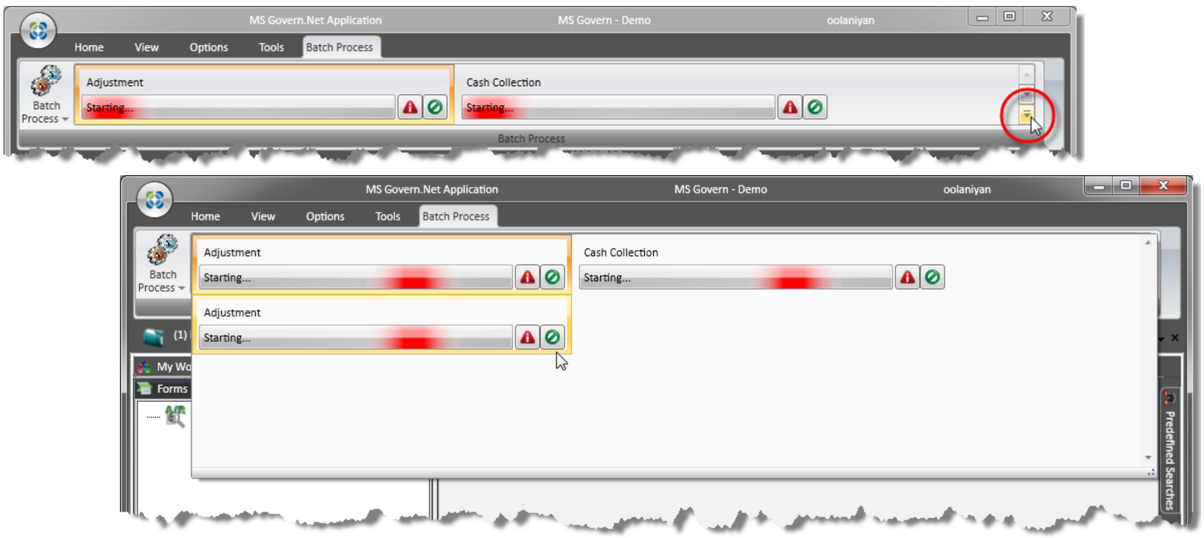


5. The process is initiated with a click on **Execute** (**C**).

When one or more batch processes are executed, they will be displayed in the ribbon area under the Batch process tab (**D**). Each process is represented by a gauge with command buttons.



To view all batch processes that are running, click the expansion arrow in the lower right hand corner of the ribbon area.



Each Batch Process will display a status light indicating progress.

Cancelling a Batch Process

1. Click **Cancel Batch Process** to terminate the process.
2. The *Cancel Batch Process* will change to a **Exit Batch Process** button .
3. When there are error notifications associated with the Batch Process, click **Show Notifications** , to display the list of *Errors*, *Warnings*, and *Attachments.* Each can be viewed with a click on each tab.

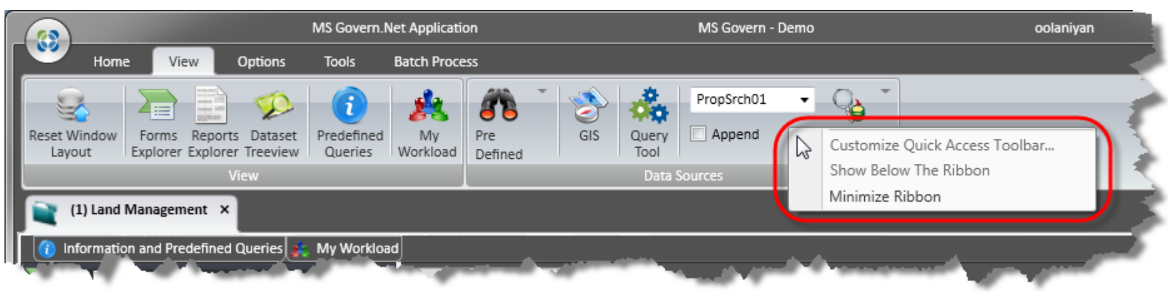
Review the *Errors*, *Warnings*, and *Attachments*; click **Copy** to copy the selected message to the systems *Clipboard*. The text of the message can then be pasted into a word processor or text editor.

4. Click **Exit** to close the *Notifications* screen.

5. On the *Batch Process* gauge, click **Exit Batch Process** to close it.

For additional details about batch processes, refer to the user guide for the each individual module.

Customizing the Ribbon



Minimizing the Ribbon

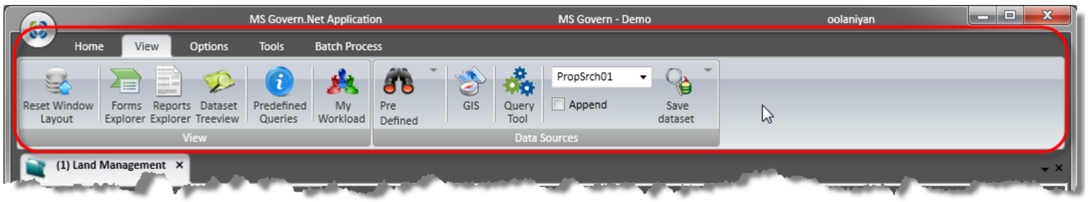
Customizing the *Ribbon* is limited to hiding or displaying the ribbon. If your display area is limited, hiding the *Ribbon* will free up some required space.

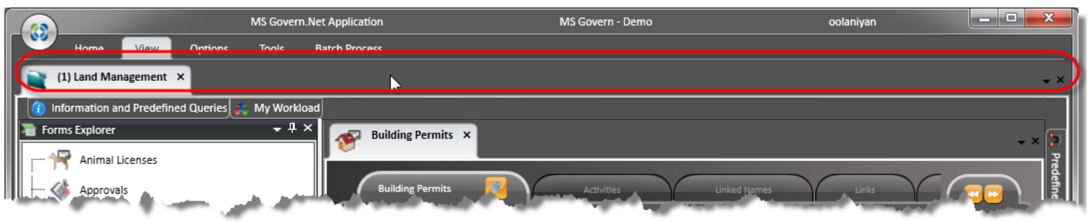
To modify the appearance of the *Ribbon,* i.e. hide, the Ribbon...

1. Right-click anywhere along the *Ribbon*. The floating menu will present you with the option to *Minimize the Ribbon*

Note: The options for *Customize Quick Access Toolbar...* and *Show Below the Ribbon* are not available for selection at this time.

2. Select the option; the *Ribbon* will be minimized.

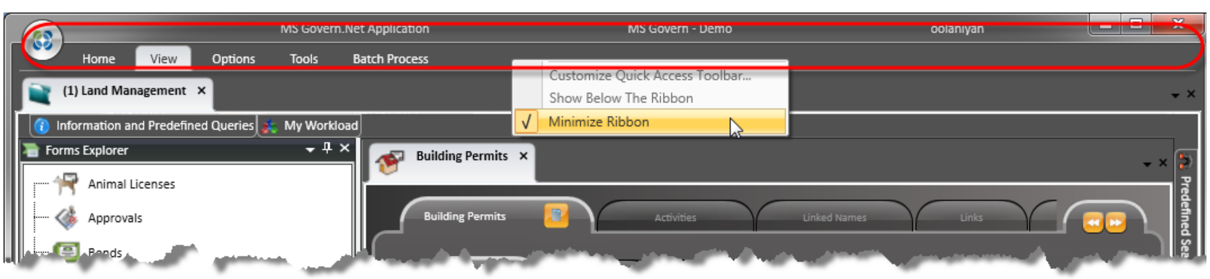




Restoring a Minimized Ribbon

To restore a Ribbon that has been minimized...

1. Right-click along the menu strip where the *Home*, *View*, *Options*, and *Tools* menu appear.



2. The option to *Minimize the Ribbon* will appear with a check mark beside it; select this option.
3. The *Ribbon* will be restored.

The Explorer panes

To work in *Govern*, you will need to open one or more profiles. The *Explorer Pane* is the area to view the contents, or OpenForms, of an open *Profile*. The *Profile* will contain *OpenForms*, *Reports*, and *Datasets*. *For details about Profiles, see Profiles on page 86.*

Govern Pane Buttons

Note: Although the *Forms Explorer* is being used in the following examples, the procedures may also be applied to the *Dataset Treeview* and the *Reports Explorer*.

On the title bar of the *Forms Explorer* are buttons that allow you to change the appearance of the *Govern Security Manager* interface.

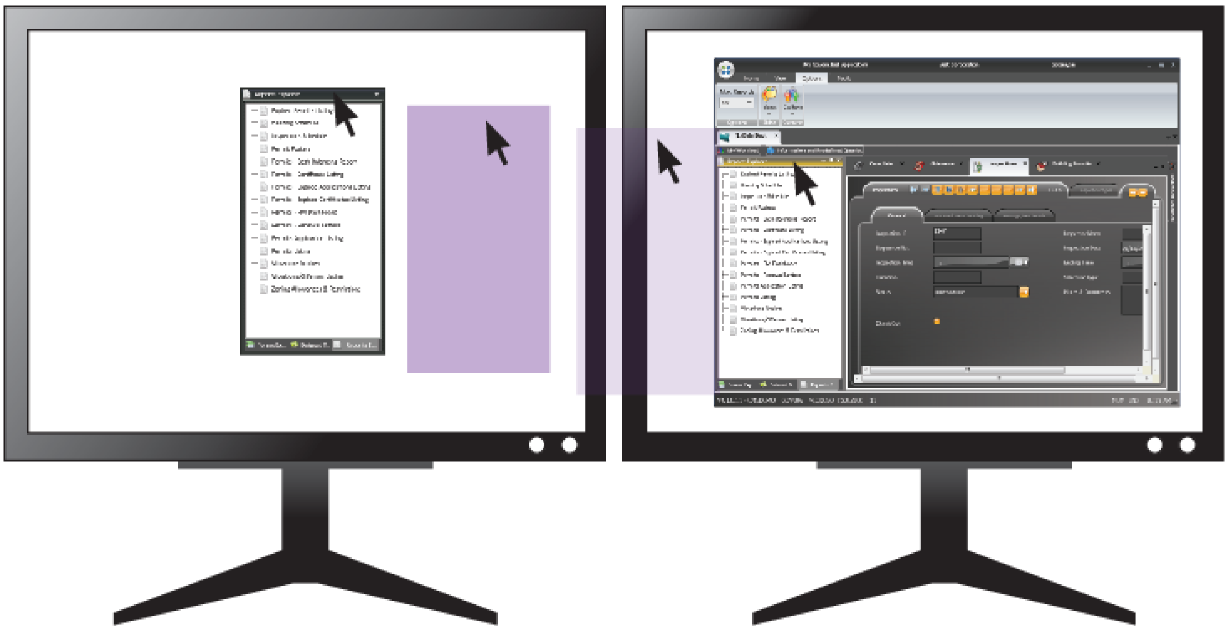
Pane Options Button

Click on the triangular icon of the Pane Options button (**A**) , or right-click anywhere along the title bar of the pane to display menu options.

Note: Some view options available in the Pane Options Menu can be achieved by dragging the pane title bar and dropping it on a Diamond Docking Guide. See *Minimizing the Ribbon on page 49 for details.*

Floating: Select this option to display the pane as a floating window.

Widescreen Displays and Dual Monitors



If your system is configured with a widescreen display or you are working with dual monitors. You can take advantage of your extended desktop setup by using the **Floating** option for some of your panes.

TIP: To restore a floating window to its last configuration, double-click on the title bar of the floating window.

Dockable: This is the default option; select this option to keep the panes in a docked configuration.

Tabbed: The tabbed option is not used in Govern and so cannot be selected.

Auto Hide: Select the *Auto Hide* option to dock the pane to the left hand side of the interface. The pane can now be activated by hovering the mouse over the tab (**A**). To restore it to its previous view, when the pane is open, reselect the *Auto Hide* option.

Note: Selecting *Auto Hide* is the same as selecting the "pin" button on the title bar of the pane. *See The Pin button on page 54 for details.*

To restore the pane to the *Dockable* view when *Auto Hide* is selected...

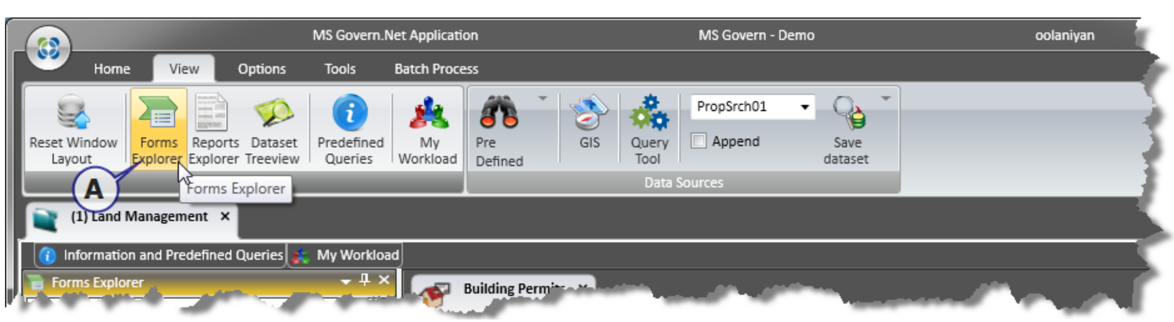
1. Hover your mouse pointer over the tab on the left hand side of the window to display the pane.
2. Right-click on the title bar and select *Auto Hide*.

Hide: This option will hide the *Forms Explorer* pane.

To select the *Hide* option...

1. Right-click on the *Forms Explorer* tab.
2. On the floating m7enu, select **Hide**.

When the *Forms Explorer* is hidden, it can be restored with a click on *Forms Explorer* in the *View* section of the *Ribbon* (**A**).



Note: The above procedure will also reopen the *Object Explorer* when it has been accidentally closed.

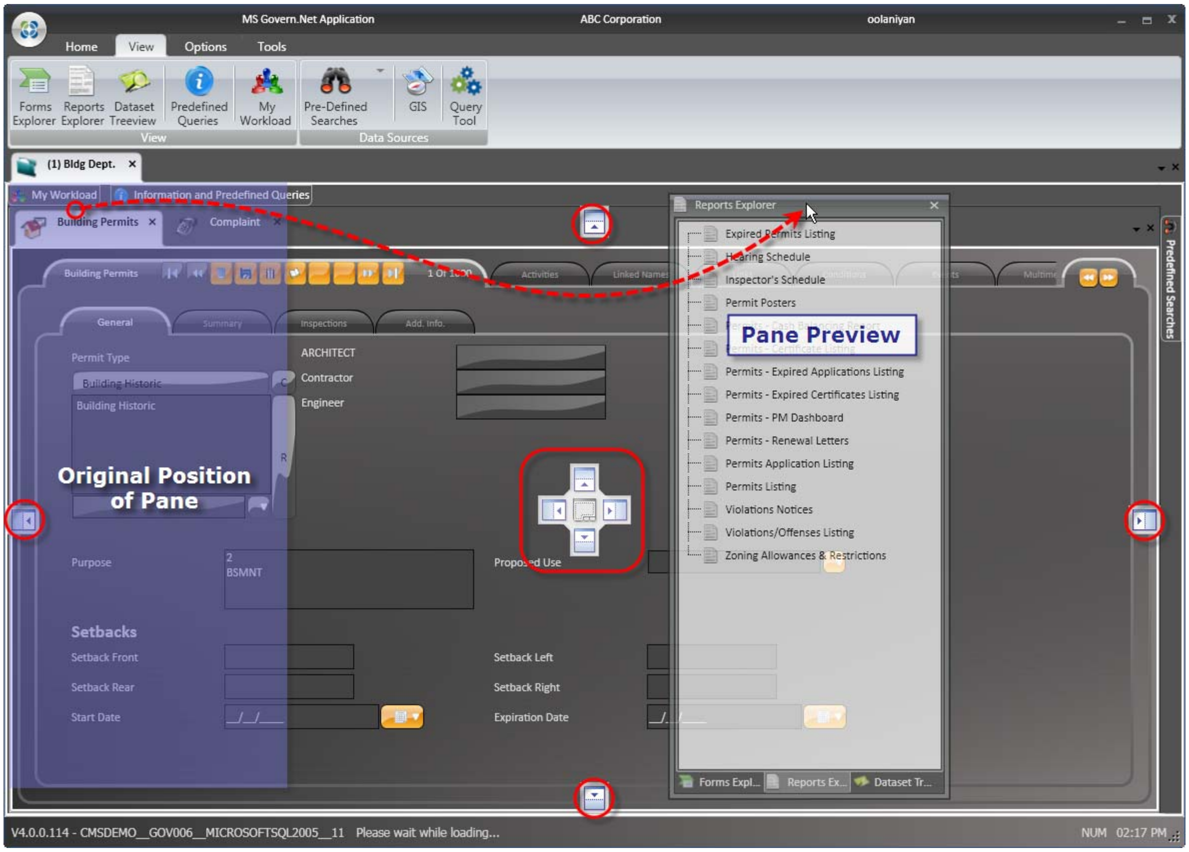
Note: When the *Auto Hide* option is selected and the pane is open, you can make the pane recede back into the tab by performing the following action, click to activate the title bar of the open pane, then click anywhere within another open pane.

The Pin button

The pin button collapses a pane and attaches it to the bottom or the side of the interface. If selected, the pin icon will appear horizontal. When you click the pin button, the pane will take on the behavior of the *Auto Hide* option. *See Auto Hide: on page 52 for details*. To restore the pane to its previous view, hover the mouse over the tab, when the pane opens, click the pin to turn off the option.

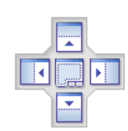
Reconfiguring Panes

Panes are re-configured by dragging their title bars from one location, and dropping to another. When you drag a title bar, you will observe a **Pane Preview**, i.e. a transparent representation of the window pane that is being dragged. In addition an overlay of icons appear, this overlay is referred to as a **Diamond Docking Guide**.

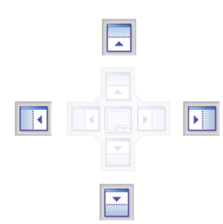


Note: When dropping the *Pane Preview* on one of the icons of the Diamond Docking Guide, ensure that you position your pointer directly on top of the desired icon.

The Diamond Docking Guide



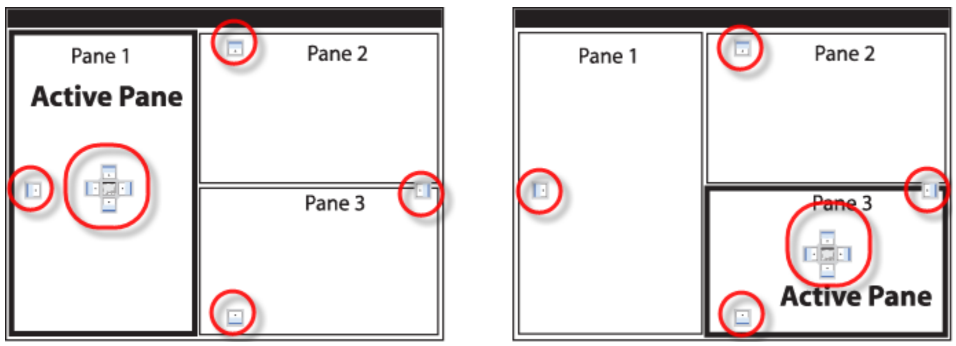
Dragging a *Pane Preview* to a location with a *Diamond Docking Guide*, the pane can be positioned in one of five (5) central icons, top, bottom, left, right, and center.

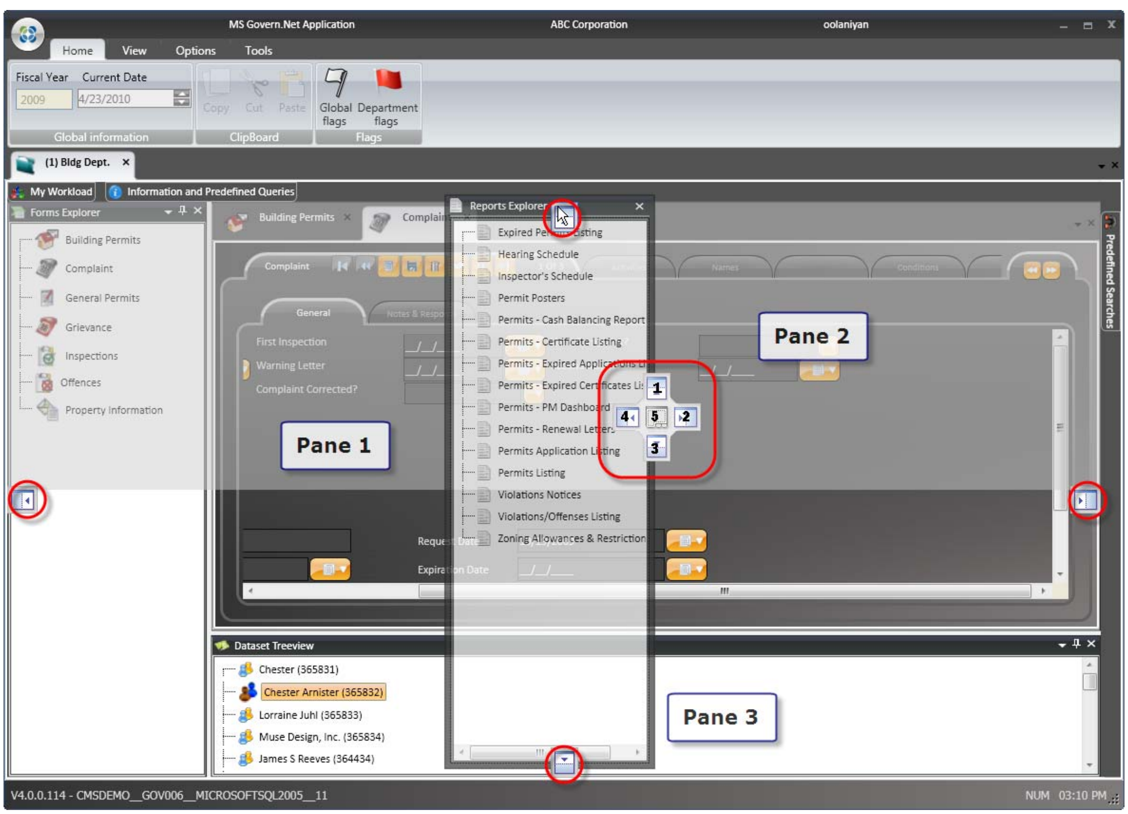


In addition, there are four (4) **Periphery Icons** within the application window that the pane preview can be dropped onto; they are located on the top, bottom, left, and right. When a pane preview is dropped on any one of these periphery icons, the dragged pane will be placed in a position that is relative to the entire application window.

Repositioning Panes

As you drag a pane to a new location, a *Pane Preview* and the *Diamond Docking Guide* can appear in various locations. When your application window has 2 or more panes, each time you move the pane preview over any one of the panes, a Diamond Docking Guide will appear. You will notice that the five (5) position central icon appears over the active pane, and the four (4) position periphery icons always appear relative to the application window.



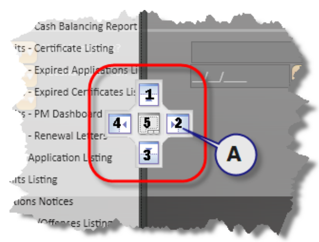


Placing the *Pane Preview* over one of the five (5) central icons will reposition the window within the pane that the central icon is located in.

Repositioning a Pane within a Pane

To reposition the *Reports Explorer* pane within another pane...

1. Drag the title bar of the *Reports Explorer* pane from its original location.
2. While dragging the pane, the *Diamond Docking Guide* will appear (**A**) in the center of the interface.
3. Place your **pointer** over the number “2” position, you will notice a dark preview that indicates where the new pane will be located; release the mouse button.

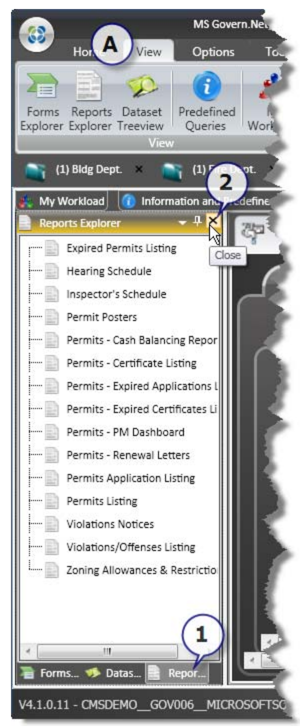


In some instances, should a pane preview be placed on the number “5” position of the central icons, then the repositioned pane will be tabbed with the existing pane.

Note: The number 5 position has been disabled for Govern so a pane preview cannot be tabbed in the center pane. What will occur is the repositioned pane will become a floating window.

Tip: When a pane has been changed to a floating window, you can double-click on the new windows title bar to return it to its previous configuration.

Removing an Explorer Pane



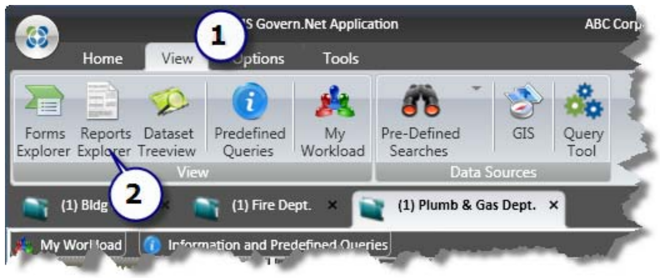
As individual departments have specific tasks, they may not necessarily require the same configuration. Some departments may not require access to reports, and as a result they may simply want to remove the *Reports Explorer* to minimize clutter.

To remove the *Reports Explorer* pane in the *View* tab (**A**)...

1. Click the tab that represents the *Reports Explorer* pane.
2. When the pane appears, click the Close icon, the “X” in the upper right hand corner of the pane.

The *Reports Explorer* pane will remain closed until it is reopened, this includes closing and reopening the application.

Reopening Closed Explorer Panes



To reopen the *Reports Explorer*...

1. On the *Ribbon*, click the **Views** tab.
2. In the *View* group, click **Reports Explorer**.

When reopened, the *Reports Explorer* will appear in the position it occupied before being closed.

Note: The above steps may also be used to reopen the *Forms Explorer* and the *Dataset Treeview* panes.

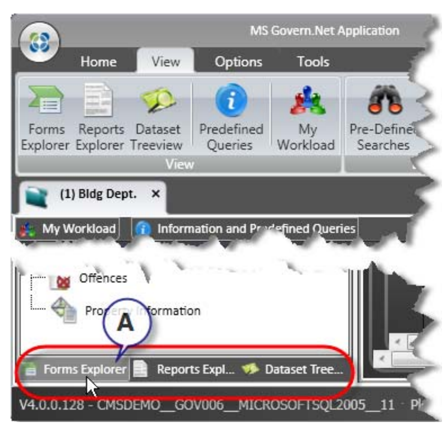
Forms Explorer

To display the *OpenForm* in the *Forms Explorer* (**A**), double-click on the icon. The form will appear on the right hand side in the *OpenForm* area (**B**).

Note: There may be a slight delay between the initial click on the icon and the appearance of the form. This delay is a function of your connection speed to your database, and/or network traffic.

To open an *OpenForm*...

1. In an open profile, click to select the *Forms Explorer* tab along the bottom of the pane (**A**).
2. In the *Forms Explorer* pane, you will see the *OpenForms* that are attached to this profile.
3. Right-click on the *OpenForm* name or icon; select **Open** from the floating menu.



OR

4. Double-click on the *OpenForm* name (**B**).

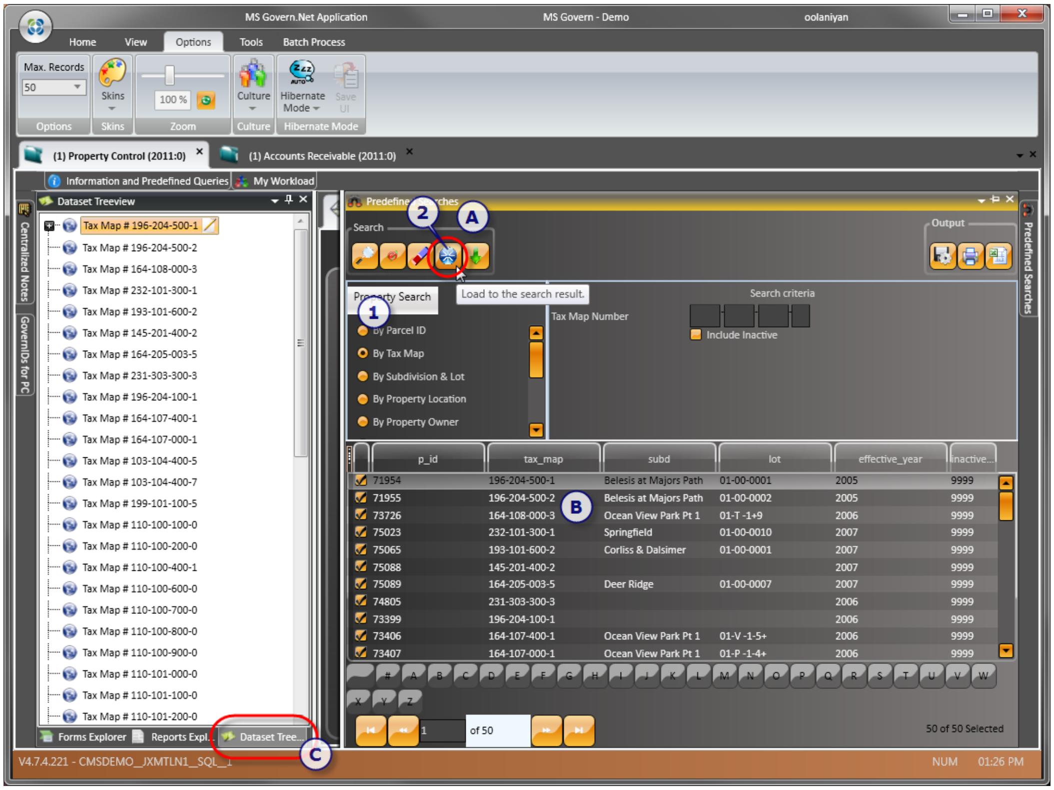
5. The form will open on the right hand side (**C**).

Note: As with opening a *Profile*, there may be a slight delay between the initial click on the icon and the appearance of the *OpenForm*. This delay is a function of your connection speed to your database, and/or network traffic.

Tab Navigation Controls

When an *OpenForm* appears with multiple tabs and sub tabs, a new tab with navigational buttons will appear at the far right hand side of the active tab. *SeeOpenForms Tab Navigation Control on page 90 for details.*

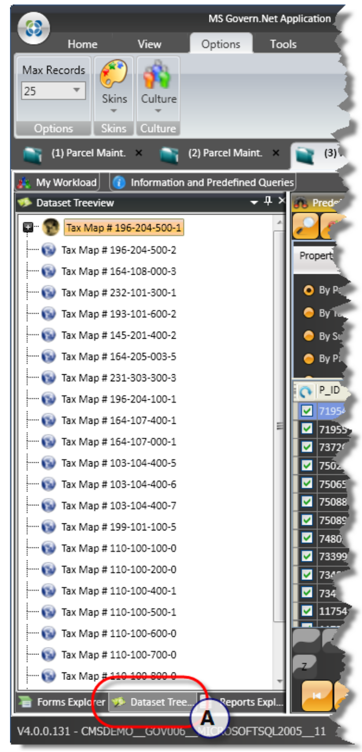
Dataset Treeview



The datasets that appear in the *Dataset Explorer* are populated with the results of searches made through the *Search* form.

Note: There are business rules that govern what data records are displayed in the Dataset Treeview. *See Business Rules for Display of Data Records in the Property Control Release 5.1 user guide for details.*

Populating the Dataset Treeview



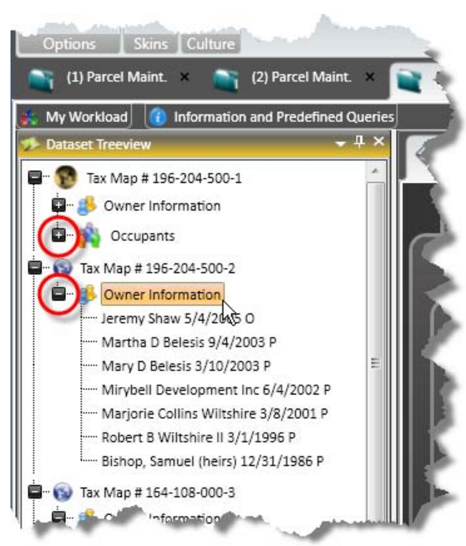
To populate the *Dataset Treeview* with search results...

1. When the Predefined Searches pane is in its default position, place your mouse pointer over the tab to display the search form (**A**).
2. In the form perform a search type; for this example we will perform a property search by *P_ID*.
3. Click *Search for Result*.
4. Search results will be displayed in the lower portion of the search form.
5. Click **Load to the search result** to transfer the search result records to the *Dataset Treeview* pane.
6. If the *Dataset Treeview* pane is not displayed, click its tab at the bottom of the pane.

The Treeview

The *Treeview Explorer* displays record information in a hierarchical arrangement. In the treeview panel, you are able to expand or contract a record by clicking on the plus (+) or minus (-) icons.

For example, on a search that retrieves tax map records, when you double-click on the tax map, it lists name information at the next level. Each item can be expanded to show specific data on the property, such as owner and occupant names, parcel information and location, permits, utility billing and accounts receivable records.

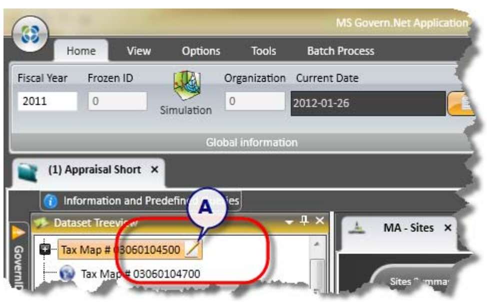


As you select each level of information, the data is displayed in the appropriate OpenForm when it is displayed on the right hand side.

Security Option - Record Edit Confirmation

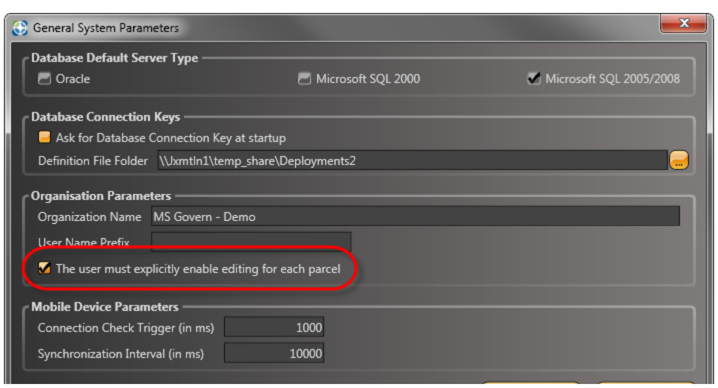
When a dataset has been loaded, it is easy to select and begin to edit a record. This ease of selection may at times be a detriment as at times the wrong record may be selected, and the user immediately begins to edit in error. It has been determined that if a secondary confirmation is introduced during the record selection process, there is less chance of erroneously editing the wrong record.

Through the *Govern NetAdmin* (**GNA**), the **Record Edit Confirmation** option can be enabled to add a secondary confirmation. When *Record Edit Confirmation* is enabled, after the user selects a record, they are obliged to click on a secondary icon (**A**), to fully unlock the record for editing.

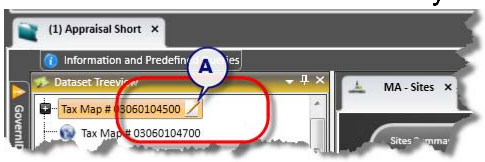


To enable *Record Edit Confirmation*...

1. In GNA, select *System Parameters* > **General Installation Parameters**.
2. In the General System Parameters form, locate the Organization Parameters group and select **The user must explicitly enable editing for each parcel** option.
3. Click **Save** to save the option.



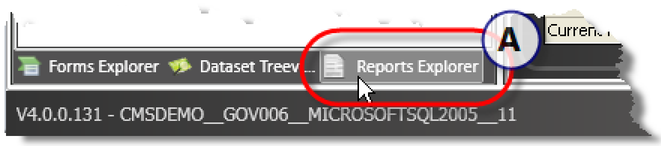
When this option is enabled, after loading a dataset, users may still select a record for editing, but the selected record will have an icon beside it. The user must click the icon in order to fully unlock the record for editing.



Reports Explorer

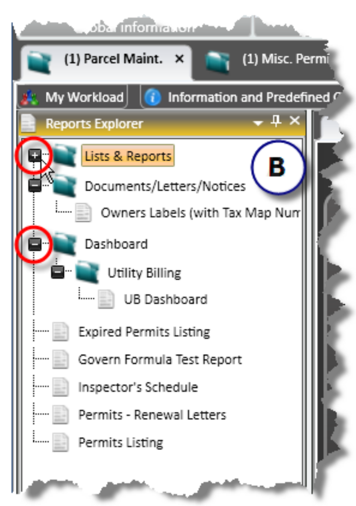
Depending on the requirements of the department, some Profiles may have been configured with reports. For example, a *Business Model* designed for permitting could be configured with reports that can list owners, list expired permits, or generate renewal letters.

The reports that are available in the profile can be viewed in the Reports Explorer (**A**).



Viewing Available Reports

Reports are presented in a treeview format; most reports are seen at the top level. Occasionally you will see reports presented as report groups that can be expanded with a click on the [+] to expand and on the [-] to collapse.



To view the list of available Reports in an open Profile...

1. Click to select the **Reports Explorer** tab.
2. In the Reports Explorer pane, you will see the list of available reports (**B**).

If the reports are in groups, click on the [+] to expand the group and view the report.

Running a Report

To run a report from the list of available reports...

1. Click on the tab labelled *Reports Explorer* and locate a report; for this example we will use the *Owner Listing* report in a profile that is setup for *Parcel Maintenance*.
2. Double-click on the *Owner Listing* report.

Note: When you first select a report, there may be a noticeable delay when displaying the report form. This delay is a function of your connection speed to your database, and/or network traffic.

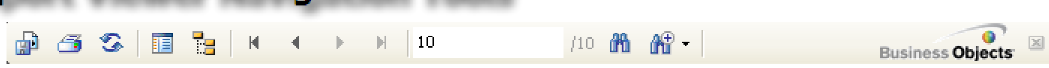
3. An *OpenForm* for the *List of Owners* report appears on the right hand side.

4. Enter the required criterions in the parameters; for this report we need the a range for the Tax Map number and an optional *Last Name* and *First Name*.
5. Click **Refresh Report**.
6. The report is viewed under the **Report** tab.

Report Viewer Tools

When the report has been generated, you can navigate through multiple page reports with the tools that appear in the embedded viewer.

Report Viewer Navigation Tools



Export Report: Click to display the Export Report dialog; select the format that the report will be save in.

Print Report: To print out the report, click **Print Report**.

Refresh: The **Refresh** button will update the report display.

Toggle Parameter Panel: Click this button to display the parameter panel.

Toggle Group Tree: Display or hide the *Group Tree* with this button.

Go To First Page: Click to navigate to the first page.

Go To Previous Page: Return to a previous page with this tool.

Go To Next Page: Click to move to the next page of the report.

Go To Last Page: To jump to the last page of the report, click this icon.

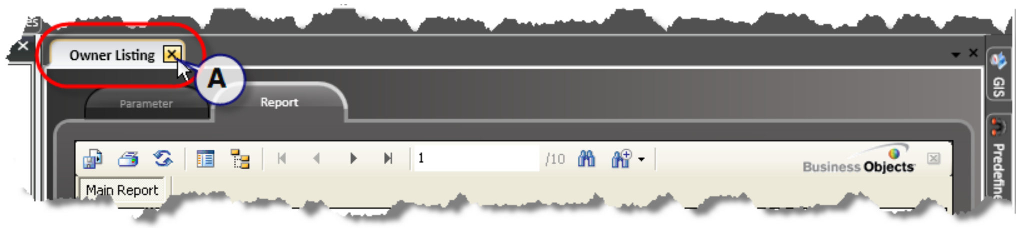
Go To Page: To jump to a specific page within the report, enter the desired page number into the parameter; click **Enter** on your keyboard.

Find Text : Click to display the Find Text form; enter the text string that you are looking for.

Zoom: Click the triangle bedside the Zoom tool to select one of the default magnifications or select *Customize...* to specify a custom magnification.

Closing a Report

To close a report, click the “X” (**A**) beside the tab with the report name.



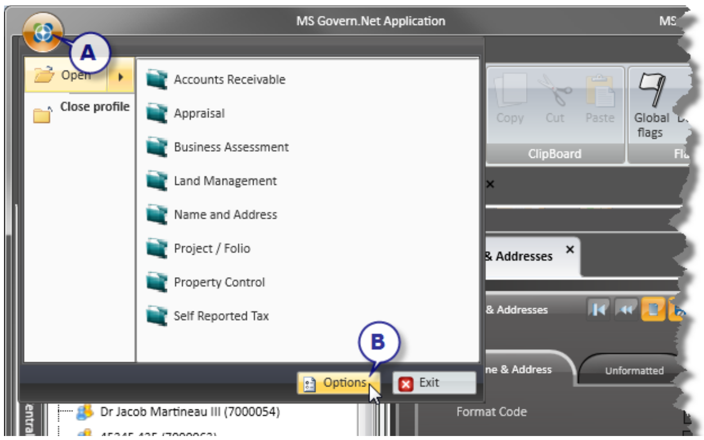
Govern ID’s

Users of the *Property Control* profile can display the Govern ID’s that are associated with each record. When enabled, the **Govern ID’s for PC** tab is displayed in *auto-hide* mode on the left hand side of the user interface. To display the tab, place the mouse cursor over the tab to expand it. The information provided under this tab can be useful for developers as it provides the ID information that are used and not used in the *Business Entity*..

To display the **Govern ID’s for PC** tab...

1. Click to select the Govern Suite button in the upper left hand corner of the application.

2. Click *Options*.



3. In the *Registry Manager* form, click the check box for **Show govern ID's Panel**.
4. Click **Save** to save your settings.

Although the *Govern ID's for PC* tab is displayed in auto-hide mode, as with any auto-hide panel, it can be made permanently visible by selecting the **Pin** button in the upper right hand corner of the pane.

View Tab - Data Sources group

See *Data Sources group on page 34* for details.

The OpenForms Form

This section will describe the general buttons and controls that are present in an OpenForm. The OpenForms interface is comprised of Object Types that are combined to equate with a Function in Govern for Windows. In an OpenForm tabbed form, there are component object types like buttons for navigating records or performing actions, menus for selections, combo boxes for drop-down selections, and Business Entitity Attributes (BEA's) or parameters to be completed. There are *OpenForms* for *Building Permits*, *Complaints*, *Fee Simulation*, *Inspections*, etc. Regardless of their functioning, the layout of the OpenForm is standardized.

OpenForm Object Types

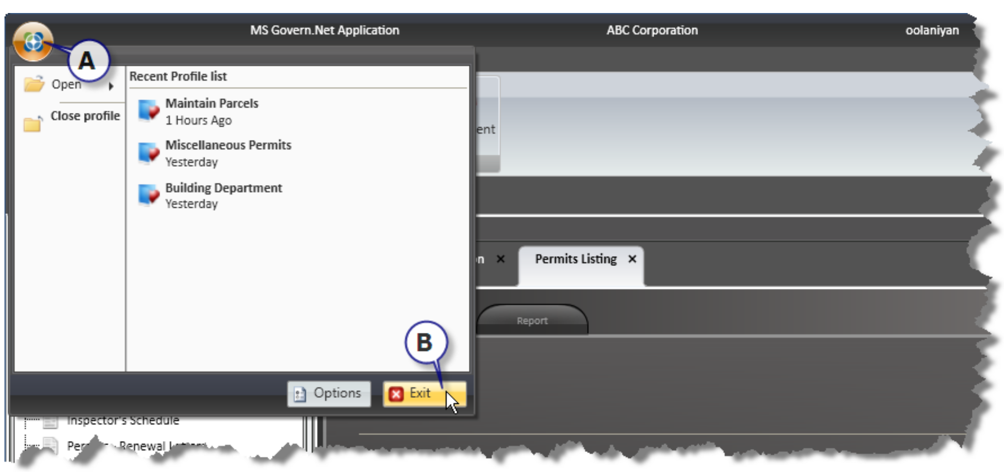
Below are the object types that will be observed in an OpenFor:

- **ActionButton -** This is a type of button that when clicked will initiate an action tied to Used when implementing a method or class.
- **Button -** Used for a control; this can be a button like the Next or Last button that appears on the tab of an OpenForm in Govern.

- **ComboBox** - This is a drop-down menu list.
- **CustomControl** - A custom control is an area that is always present in an OpenForm, or can be displayed with a button click like the Scheduling form in the *Inspections OpenForm*.
- **Grid Column** - These are the columns within a grid.
- **Menu** - These components are the user selectable menu items.
- **OpenForm BEAttribute** - OpenForm Business Entity Attributes are the parameters in the OpenForm, i.e. .
- **OpenForm Zone** - These are tabs that appear on an OpenForm.
- **Profile** - Refers to the department or workspace tab containing OpenForms and reports.
- **Report** - These are the reports that are linked to a profile, they will bbe related to the OpenForms functions within the profile.
- **TextBox** - This type of object refers to parameters for text information

Note: The above is not an exhaustive listing of all Object Types in OpenForms. *To view a complete list of Object types, refer to the Govern Security Manager (GSM) guide*

Exiting from Govern



When you exit from *Govern*, the profiles and any *OpenForms* are saved; the configuration is restored the next time the application is opened.

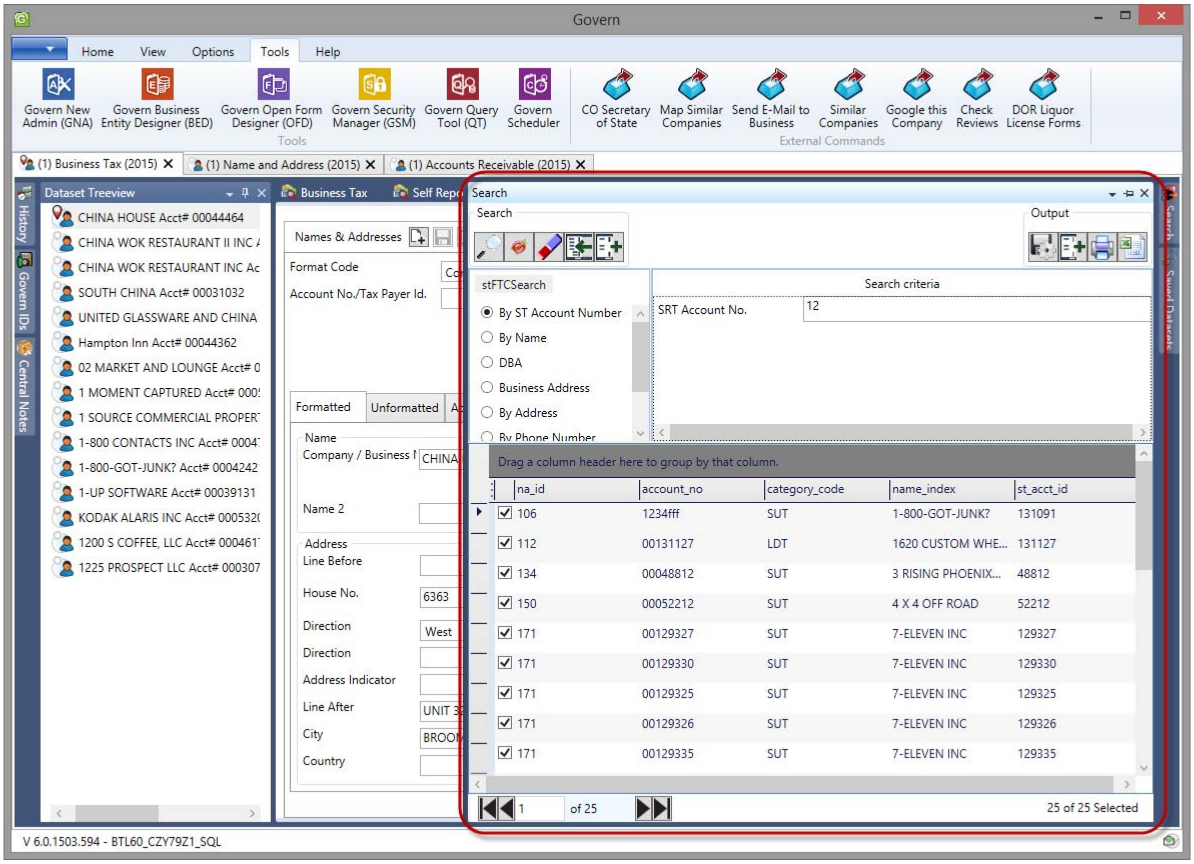
To exit from *Govern*...

1. Double click on the *Govern Suite* button (**A**).

OR

2. Click the *Govern Suite* button and select **Exit** (**B**).

Search Pane



The **Predefined Searches** pane is the main user interface for performing searches on the database. As searches can produce numerous results, these results can be controlled with the value specified in the *Max. Records* parameter in the *Ribbon*. *See About Maximum Records on page 38 for details.*

Predefined Searches (The Search Interface)

About Searches

Predefined Searches are queries that have been preset for the user. When a search is performed, you are querying the database based upon your specified criteria. For example, a search by Parcel ID (P_ID) will return all records with a P_ID or a P_ID that matches a specified parameter. When the

Max. Records parameter is used, i.e. a value of 25 is specified, only the first 25 records are used. If there are more records, they are discarded. Additional sorting can occur, but only on the records obtained. *See Sorting Search Results by Column Heading on page 83 for details.*

Treeview Synch

NEW! In Govern for VB6, external tables (PC_EXTERNAL, NA_EXTERNAL, and PM_EXTERNAL), were used by external applications and reports to automatically know the current recordset and currently viewed parcel. In Govern release 6.0 and upwards, these external tables are being phased out and the functionality provided by them has been reproduced.

The Treeview sync. feature saves the contents of the current profile in (Table: USR_SAVED_DATASETS) with a "Saved Dataset" name of "AUTOSAVE" under (Column: USR_SAVED_DATASETS.SAVED_SET_NAME). Should a profile be changed, the dataset loaded in the Treeview will be automatically synchronized to (Table: USR_SAVED_DATASETS).

This feature recreates the functionality provided by the three (3) external tables that were used in Govern for Windows, (Tables: PC_EXTERNAL, NA_EXTERNAL, and PM_EXTERNAL). For example users could run a batch process on a saved external dataset as opposed to a set range.

Note: In release 6.0 a simultaneous save will be made to (Table: PC_EXTERNAL) and (Table: USR_SAVED_DATASETS), Tables NA_EXTERNAL and PM_EXTERNAL are no longer supported.

In release 6.1, all three (3) tables PC_EXTERNAL, NA_EXTERNAL, and PM_EXTERNAL will not be supported.

- PC_EXTERNAL (Supported in release 6.0; not supported in release 6.1)
- NA_EXTERNAL (Not not supported in release 6.0 and 6.1)
- PM_EXTERNAL (Not not supported in release 6.0 and 6.1)

Enabling “Synchronize Dataset Treeview”

This feature is enabled in the User Registry through the User Registry Manager. The Options button is located below the Govern suite button in the Govern User Interface. *See User Registry in the Govern 6.x user guide for details.*

1. Click the Options button; click Options.
2. In the Registry Manager form, verify that the Registry Filter is set to User ID.
3. Under the Section Name column, locate Synchronize Dataset Treeview; click to select the option under the Key Value column.
4. Click Save to save your changes.

When you return to the Govern interface, the Treeview Sync. icon will be enabled. This is a toggle, i.e. ON/OFF button that will enable or disable the feature.

As indicated above, all data will saved in (Table: USR_SAVED_DATASET). Associated columns are as follows:

Column	Description
USR_ID	User ID
SAVED_SET_NAME	By default will be AUTOSAVE
REF_TYPE	"P_ID", "NA_ID", etc. Based on the profile Key Type
SORT_SEQ	Order in the Treeview
IS_CURRENT	TRUE if the current item in the Treeview

Note: All data will be saved based on the Key Type of the profile. This is done so as to support multiple Key Types at the same time.

- The data is not saved by profile, so the synchronization for a Key Type will be done on the last active profile using that key type.

The desired behavior when there is more than one Treeview dataset for the same ID Type is to perform a reload when the user switches from one instance to another.

Search Pane - Command Buttons

Search for Results: Click this icon to perform your search based upon your selected criterions.

Select / Deselect All: When search results are obtained, they are listed in the search pane. By default the results are all selected. Click the Deselect All icon to deselect all results; this will allow you to select only select records.

Note: The *Select All* and *Deselect All* icons alternate depending on whether all search results are selected, or deselected.

Clear: Click Clear to clear the Search Results pane of all records.

Load Selected Parcels: When this icon is selected, the search results records are transferred to the Dataset Treeview pane.

TIP: When you enter information into any of the search parameters, clicking **Enter** will start the search and automatically load results to the **Treeview**.

Add to the Search Results: To add or append the currently listed search results to the results that are listed in the *Dataset Treeview* pane, click this icon.

Clear and Save to External Tables: Click to save the search results to one of the three (3) External tables (i.e. PM_EXTERNAL, NA_EXTERNAL, and PC_EXTERNAL).

Append to External Tables: Click to append the search results to one of the three (3) External tables (i.e. PM_EXTERNAL, NA_EXTERNAL, and PC_EXTERNAL).

Print: Click **Print** to display the *Print* dialog box and print out the results of your query to your default Windows printer.

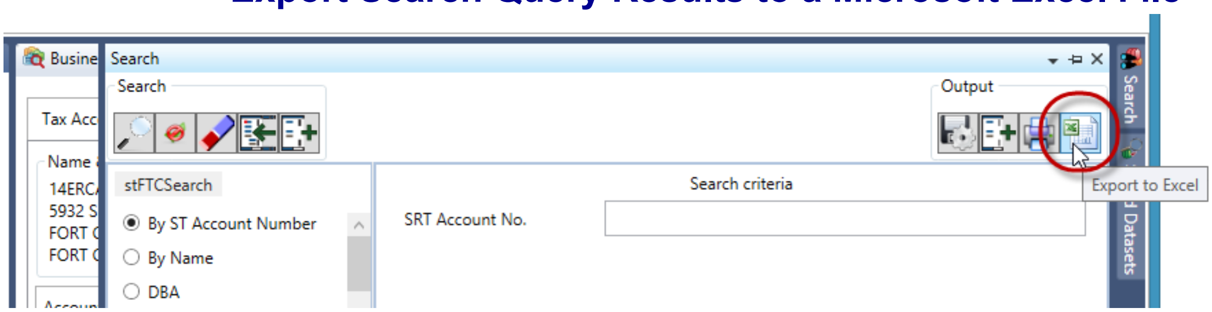
Export to Excel: Click to export the results of your query to an unformatted Microsoft Excel file. *See Export Search Query Results to a Microsoft Excel File below for details.*

Note: This feature will only work when Microsoft Excel is installed on the system that Govern for Windows is installed on. Users must have a valid license for Microsoft Excel.

To restore the search form...

1. Click the **View** tab in the Ribbon.
2. Under the **predefined Searches** section select one of the *Groups* or *Styles* searches.
3. When the search form appears, it will not be in *auto-hide* mode. Click the **Auto Hide** (*Pin*) icon to restore the form to auto-hide mode.

Export Search Query Results to a Microsoft Excel File

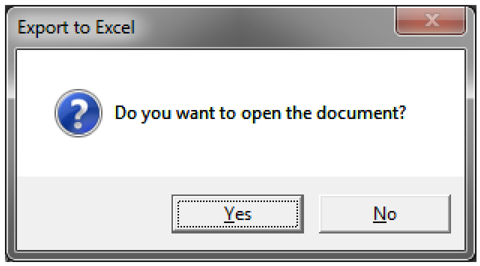


After performing a search query, you may want to further analyze or manipulate the records that were retrieved, e.g. review the tax map numbers or certificate numbers, etc.

To export query results to a *Microsoft™ Excel* file...

1. Move your pointer over the *Predefined Searches* auto-hide pane.
2. Complete the necessary parameters and click the *Search* icon to perform a search.
3. Click the *Export to Excel* button.
4. When the save dialog box appears; specify the name of the Excel file and the location that it will be saved in.
5. Once a name has been given, click **Save** to save the file.

6. Next you will be given the option to open the file immediately in Excel; click**Yes** to open the file in Excel.

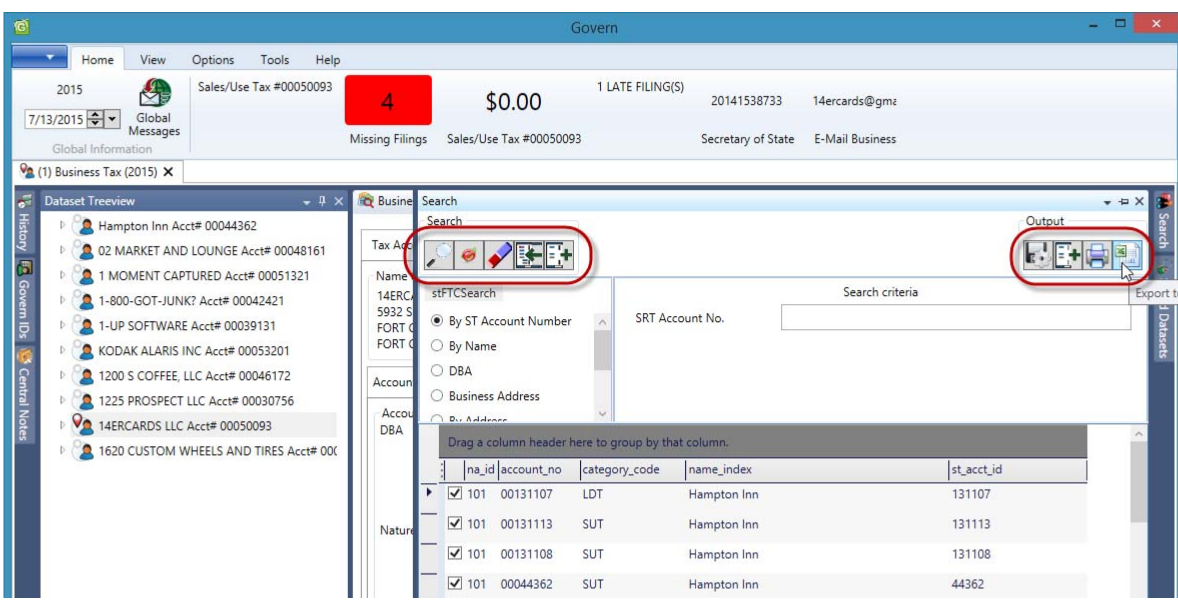


The records that are exported to Excel will not be formatted, i.e. only default fonts and alignments will be used.

Note: This feature requires that a version of Microsoft Excel must be installed on the same system that Govern for Windows is installed on. Users must obtain a valid license for Microsoft Excel.

Search Command button grouping

The *Search Pane* command buttons are grouped for clarity and to accommodate the command buttons with functionality that is related to the mobile version of *Govern*. There are two (2) groups of command buttons; Search-related buttons, and Output-related buttons,



Search Types

Depending on the search type that is selected, the Search Criteria pane will display the corresponding parameters.

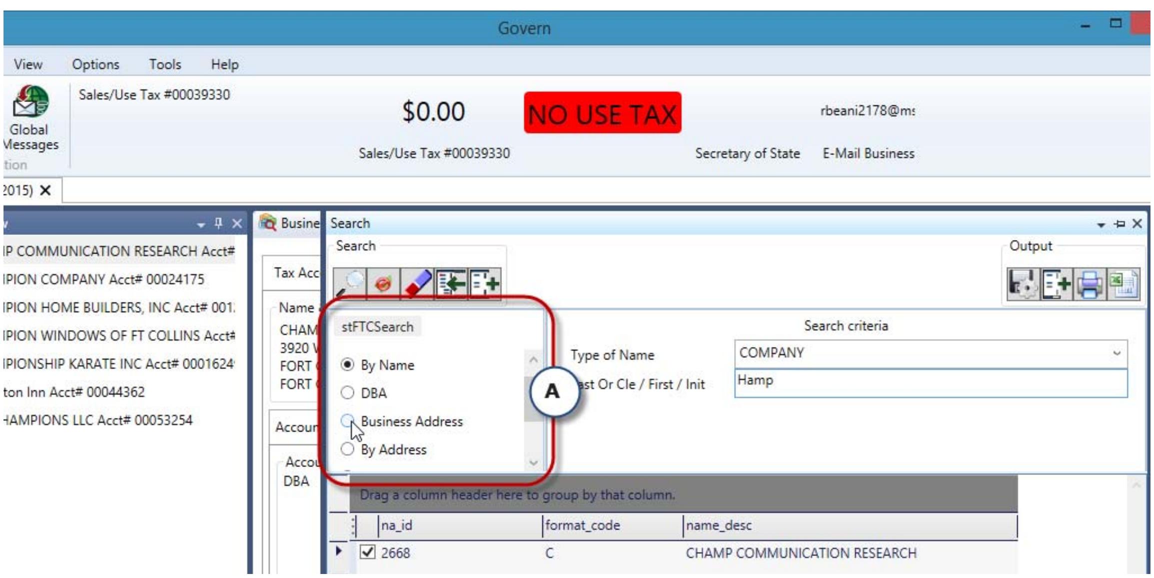
Searches in Govern

The search process is one of the key functions in Govern. The search function allows you to retrieve datasets from the database. Further actions such as creating permits, attaching messages, generating licenses, generating mailing lists, etc. can then be performed on the records in these datasets.

Searches are preset queries that are submitted to the database.

To perform a search...

1. Click *Pre-defined Searches* in the *Ribbon*.
2. In the drop-down menu, click Groups search or Styles search.
3. In the *Predefined Searches* form, click **Property Search** to view the drop down menu.



4. Select **Property Search** (**A**).

5. Under *Property Search* are options to select a search criteria; select **By Tax Map**.

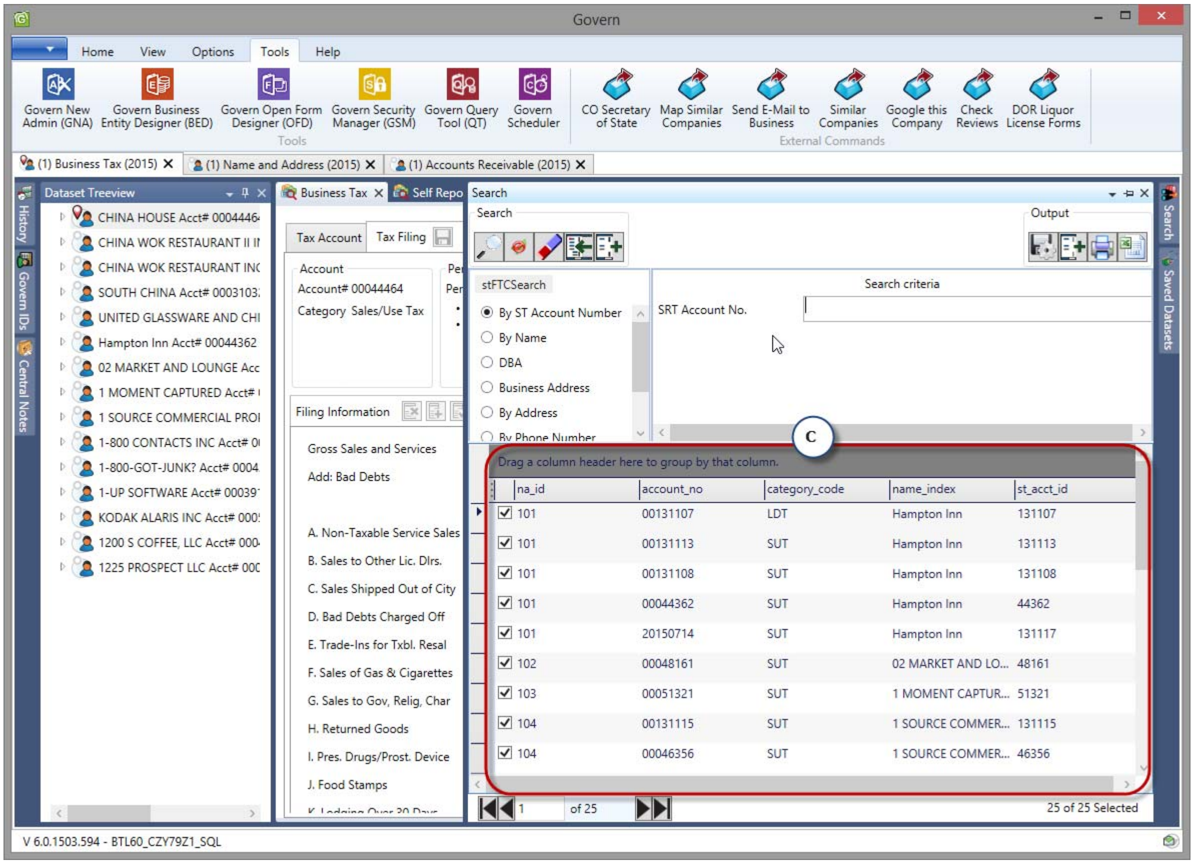
TIP: When using Predefined Searches press the **Tab** key to quickly move your cursor from field to field for quick entry.

A note to Users accessing Govern Remotely

Note: Users should note that parameters with field masks that are designed to accept hyphen separated entries entries, e.g. Telephone Numbers, Tax Maps, will display in OpenForms as a parameter with individual fields. These individual fields can be accessed with the tab key . The **Field Mask** would look like the like the following "XXX-"XXX-XXX-X", each of the grouped X's are separated. Users that are accessing Govern over a **Remote Link**, e.g. VPN should pay attention to the tab sequence when pressing the *Tab* key to jump to the next parameter. Over a remote connection, in the Tax Map parameter, the tab key will not move the cursor to the next field of the Tax Map number, rather it will jump to the **Include Inactive** parameter (**1**). *This behavior only applies to **remote connections** to Govern.*

6. Click the *Search* icon.
7. When the search is complete, the results are displayed in the Search Results pane (**C**).

Note: When you enter information into any of the search parameters, click **Enter** to start the search; search results will be automatically transferred to the **Treeview**.



8. Click the option for *Load to the Search Result*. The results are loaded into the *Dataset Treeview* pane; you can also populate the *Dataset Treeview* automatically by selecting any parameter and clicking on **Enter** on your keyboard.

> **Note:** Only a maximum of 25 search results are displayed; this is can be modified under the *Options* > **Max. Records** in the ribbon.

Search Criteria

The *Search Criteria* will display the search parameters that have been configured with the *Search Type*.

Search Result Pane

When a search is performed, the *Search Results* pane displays the results in a grid below the *Search* and *Search Criteria* areas.

TIP: When you enter information into any of the search parameters, clicking **Enter** will start the search and force search results to automatically transfer to the **Treeview**.

Reposition

NEW! Previously, when performing a search of records with the same NA_ID but multiple ST Account numbers, when you copy the record to the Treeview, the system would only select the first account. Now the selected record will be sent to the Treeview. (Available in release 6.0.1503)

Hibernate Mode

NEW! This behavior of selecting only the first account also applies to the Hibernate process. As Govern is restored from a hibernation if a second or third account is selected before hibernation, when the application is restored, although the NA_ID is correct, only the first account will be displayed.

Transfer Individual Files to the Treeview

At times you may require a single file to be loaded / displayed in the Dataset Treeview. This situation can arise when you have multiple results in your *Search Query Results* dataset. and the requirement is to look at each record one at a time.

To load a single record into the Dataset Treeview...

1. Place your mouse pointer over the *Pre-defined Searches* auto-hide tab; complete the parameters to perform a search.
2. Click the *Search* icon.
3. In the *Search Result* pane, double-click on the individual record that you would like transferred to the **Dataset Treeview** pane (**B**).

Note: When an individual file is transferred to the treeview, any previous dataset will be overwritten and replaced with the single file that was selected.

Load to Treeview and Add (Append)

NEW! As data is loaded or appended to the Treeview from the Search, or the Saved Datasets form, the following rules apply:

When a record is selected for append, only new files will be loaded. If previously loaded, the file will not be reloaded into the Treeview.

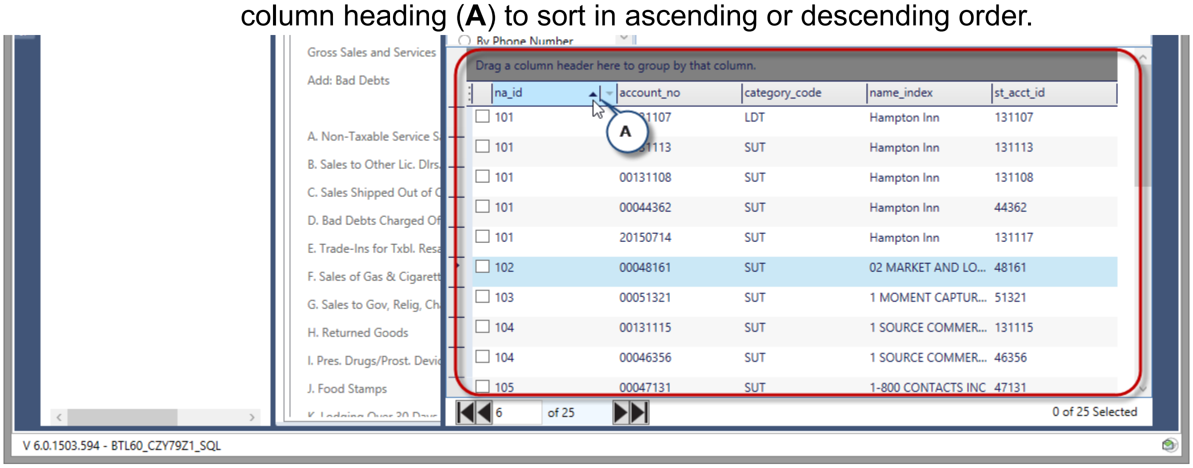
If no search result is selected, the Add to Search Results button will be disabled.

Sorting Search Results by Column Heading

Search results can be sorted based upon column headings, and in ascending and descending order.

To sort search results based on the column headings...

1. Display the *Predefined Searches* pane.
2. Perform a search; the results will be presented in the *Search Results* pane.
3. Note the column that you would like to sort your results on; click on the column heading (**A**) to sort in ascending or descending order.



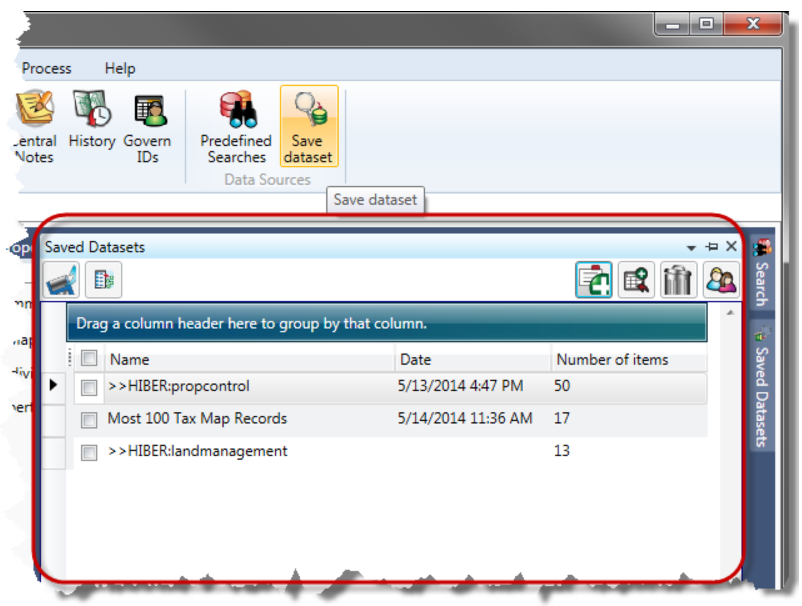
The direction of the arrowhead in the column head will indicate the direction of the sort. When the arrowhead is pointing upward, the sort is ascending, when the arrowhead is pointing downwards, the sort is descending. A click on the column heading will switch between *ascending* and *descending*.

The result will be sorted based on the column heading that you are using. When there are empty grids, i.e. NULL characters, those records are presented first when the sort is ascending, last if they are descending.

Govern Saved Datasets Pane

NEW! As indicated earlier, the search process is one of the key functions in Govern. The function allows for the retrieval of a record or a collection of records or datasets from the database. Further actions such as creating permits, attaching messages, generating licenses, generating mailing lists, and so on, can then be performed on the records in these datasets.

The *Govern Saved Dataset* pane is new in version 6.0. This pane will allow users to load, save, and delete saved datasets. This pane lists all saved datasets for the current user (…excluding datasets that were present prior to the hibernate process). With this control the user is able to, create new datasets from a search result, append to an existing dataset, load, edit, or delete one or more datasets.



Saving Search Results

The result of searches, i.e. datasets, can be saved away and retrieved for further review at a later period. For example, a search can be made for all issued permits in a municipality, at a later period the same dataset can be recalled without having to perform the same search. In addition, new search datasets can be added to the existing one.

To save a dataset...

1. Perform a search using the *Predefined Searches* pane.
2. If not selected, click to select the View tab in the ribbon.
3. In the Data Sources group, enter a name for the search.

Note: Until a name is entered for a dataset, the option icons will be “ghosted”, i.e. not selectable.

4. When a name is entered, the option icons will be selectable.
5. Click **Save Dataset**.

The dataset will be saved under the name that was entered. Additional names will appear in the drop down list.

Appending to a dataset

New datasets from subsequent queries may be added or “appended” to an existing query. This is done with the *Append* option.

To append to an existing saved dataset...

1. Recall an existing dataset.
2. Perform a new search, and obtain the resulting records.
3. In the drop down menu of the *Saved Dataset* field, select the dataset that you would like to append to.
4. Click to select the **Append** option; click **Save Dataset**.

The newly added results will be appended to the existing one. Additional datasets can be appended to an already existing saved dataset.

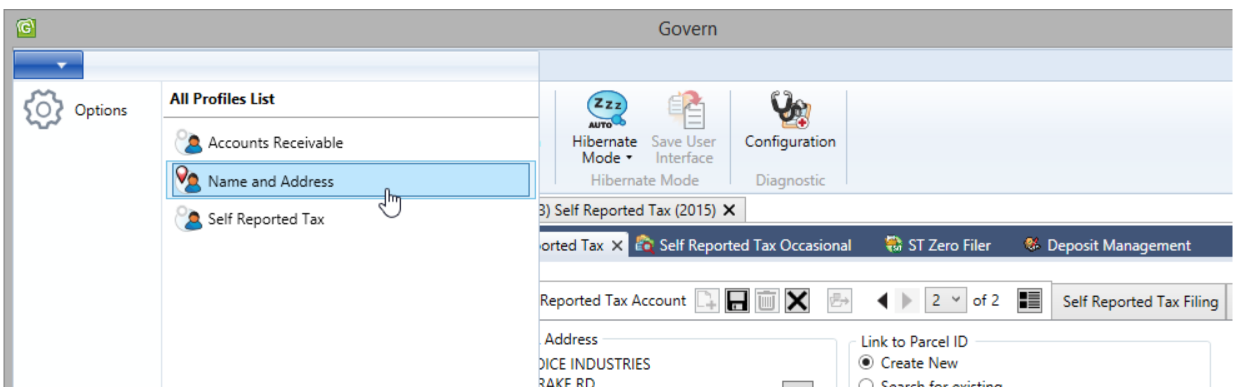
Note: The dataset information is saved in the **USR_SAVED_DATASETS** table.

Using Govern

Profiles

Govern Profiles are the equivalent of a department in an office. Within this department are the tools for performing the job that is required of the department. The *OpenForms* and *Reports* that are displayed are the ones that have been assigned to the Profile with Profile Editor in the *Govern New Administration* (**GNA**). For example a profile for the Building department might contain OpenForms for *Building Permits*, *Complaints*, *General Permits*, *Grievances*, *Offences*, *Inspections*, and *Property Information*. When this profile is being configured in *GNA*, the aforementioned OpenForms would be added. *See Creating a New Profile in the Profile Editor section of the Govern Net Admin guide.*

Note: Multiple profiles and multiple instance of a profile can be opened to a user, as long as they have been given the a privileges to them.

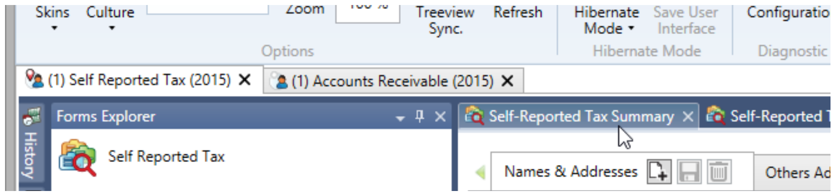


Opening a Profile

To open a *Profile* or an instance of a *Profile*...

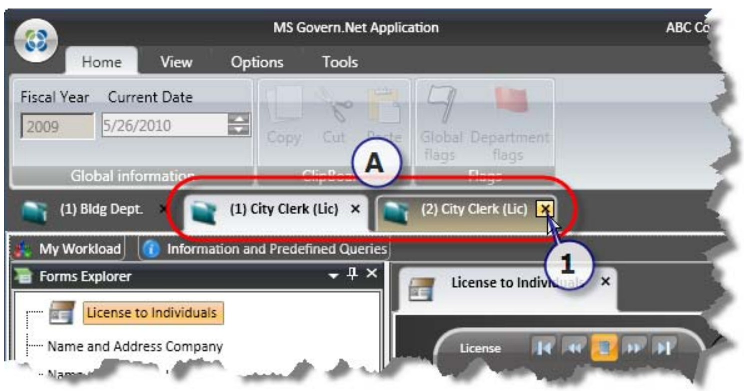
1. Click the Govern Suite button in the upper left hand corner of the applica-tion iwindow.
2. Select *Open a new instance of a Profile* > **Profile Name**; for this example we will use a profile that is designed for maintaining parcel information - *Parcel Maintenance*.

When the profile is open, its name will appear on the tab preceded by a number; this is the *Instance Number*. When multiple instances of the same profile are open, each successive tab will bear a number that increases with an increment of one.



Closing a Profile

A *Profile* can be closed at two (2) locations, directly on the profile tab, or through the *Govern Suite* button.



To close a Profile...

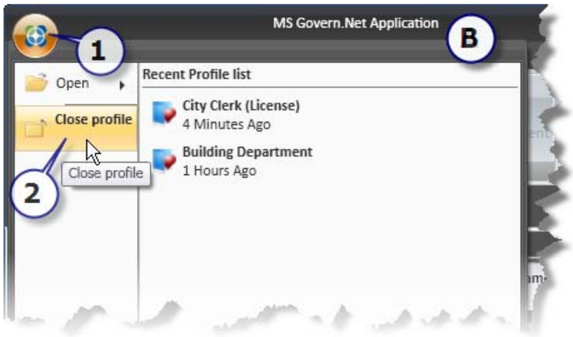
1. Locate the tab for the profile (**A**) and click on the Close button “**x**”.

Note: When you have multiple instances of a Profile ensure that the profile that you close is the correct instance

OR

1. Click to select the *Profile* tab that you would like to close (**B**).

2. Click on the *Govern Suite* button; select *Close Profile*.

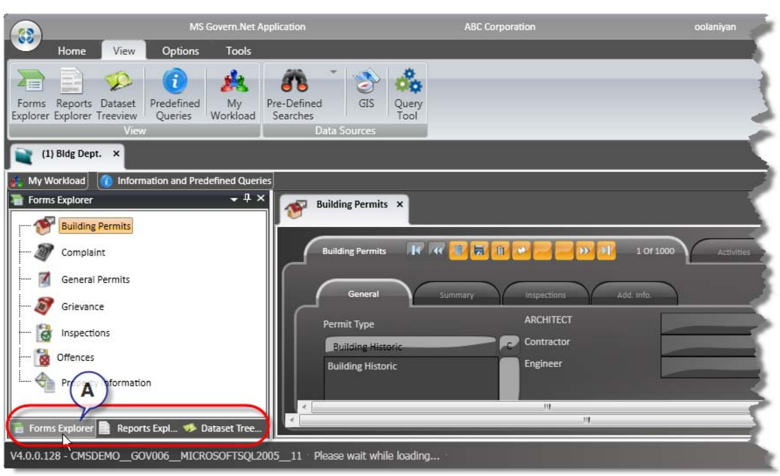


Open Forms™

Open Forms that are attached to a profile are viewed in the *Forms Explorer*.

Note: Depending on the security that has been set in the *Govern Security Manager* (**GSM**), a user may or may not see or have access to an OpenForm. If users are not able to access required *OpenForms*, they should verify their access credentials with an administrator.

By default the three (3) principal explorer panes, the *Forms Explorer*, the *Dataset Treeview*, and the *Reports Explorer*, are presented in a tabbed configuration (**A**). The content of each of the explorers can be viewed with a click on the tabs located along the bottom of the pane. Click to view the Forms Explorer pane and the available *OpenForms* in the current profile.



Opening an Open Form™

Unlike *Profiles*, only one instance of an *OpenForm* can be opened. Multiple instances of a profile also adhere to this rule, i.e. multiple instances of the same profile will not allow you to open an *OpenForm* that has already been opened in a previous instance.

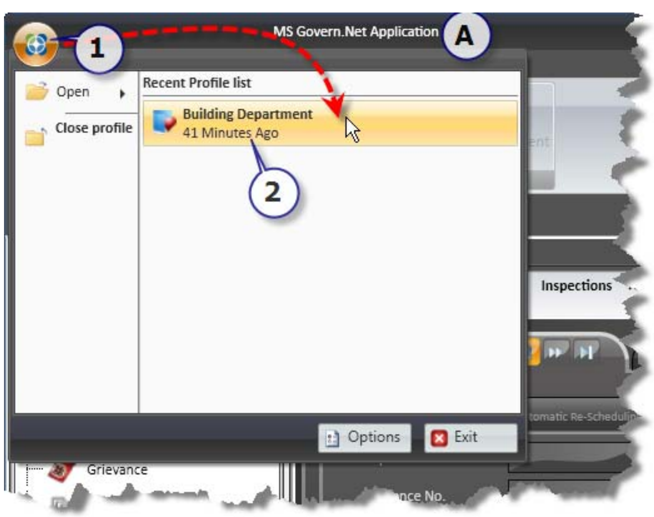
Other profiles that are configured with the same *OpenForm'*s will allow their instance to be opened. For example, the *Building Permits OpenForm* is configured in a *Building Department* profile, and an *Inspections* profile. When these two profiles are concurrently open, the *Building Permits OpenForm* can be opened in each of them. Trying to create a second instance of the *OpenForm* will not be allowed.

To open an *OpenForm*...

1. In an open *Profile*, click to select the *Forms Explorer*.
2. The Forms Explorer pane will display the available *OpenForms*; double-click on th0e name or icon of the *OpenForm*.

OR

1. Click on the Govern Suite button.



2. Under the *Recent Profile List* select the name of a *Profile* that was previously opened; this can be in a current session or a previous one.

Note: Items will only appear under the *Recent Profiles List* if they have been opened in a previous session.

OpenForms Tab Navigation Control

At times when an *OpenForm* is displayed, you will see multiple tabs and sub tabs. Depending on the size of your display, not all available tabs will be visible. When there are more tabs than the area is capable of displaying, a new tab with navigational buttons will appear on the right hand side (**RHS**) of the active tab.

When you click either of the navigation buttons, you will be able to navigate through the tabs in the *OpenForm*.

OpenForms Tabs Navigation

Previous tab: To view the tab, when available, that appears before the current tab, click the *Previous* tab icon (**A**).

Next tab: Click the *Next* tab icon (**B**)to view, when available, the tab that immediately follows the current tab.

To navigate through multiple tabs...

1. Open a Profile.
2. Click the *Forms Explorer* tab to display the *OpenForms* that are available in the profile.
3. Double-click on an *OpenForm* icon to display the *OpenForm* and all the tabs.
4. If the *Tab Navigation* buttons are not displayed, educe the width of the application window until they appear.

5. Click on either the *Next* or the *Previous* icon to view the next or previous tab.

Common OpenForms™ Controls

First: Click the *First* icon to jump to the first record in the list of retrieved records

Previous: to jump to the record that was previous to the current record, click *Previous*.

New: Click *New* to create a new record or entry.

Save: To save the current record with the entered parameters, click *Save*. This may alsobe used to save changes to parameters.

Delete: To remove the current record, click *Delete*. When you click *Delete*, a confirmation dialog box will appear. Click **Yes** to confirm the deletion.

Browse: Click *Browse* to view the records that are linked to the selected record. When selected, a new tab appears at the end of the list of tabs. *See The Browse Button* on page 92 *for details.*

Next: Use the *Next* icon to view the record that immediately follows the one that is currently open.

Last: Click last to view the last record in the dataset.

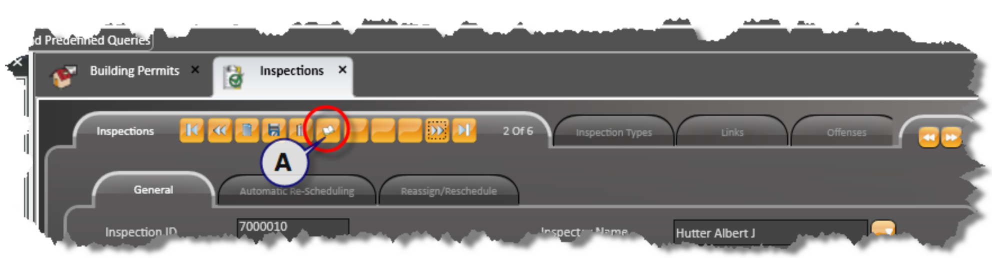
Note: Depending on the OpenForm that is being used, there will be specialty icons that are specific to the form.

User Fields with “Asterisks”

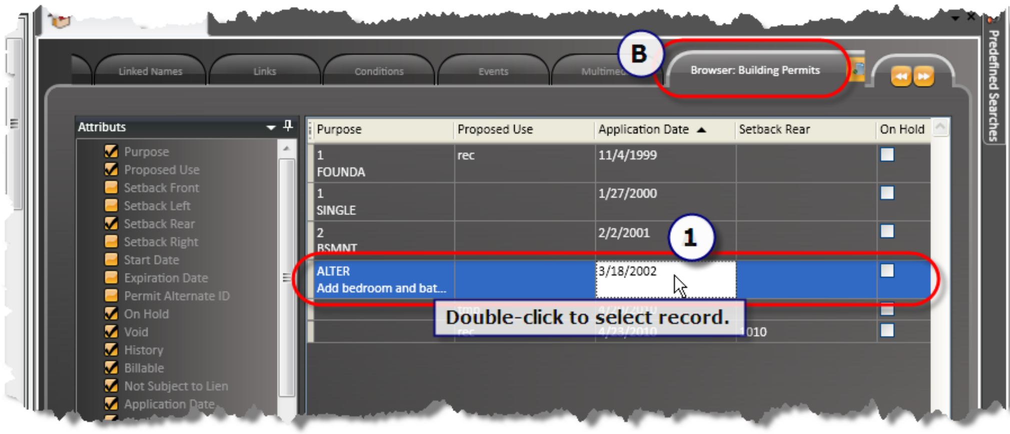
Under the *OpenForms* tab, there are fields that are marked with an asterisk ‘*’ beside them (**A**). The aterisk is an indication that these fields are mandatory or required for completion prior to saving.

The Browse Button

The Browse button is used to view data related to a record selected from the *Dataset Treeview*. Once the record has been sighted in the *Browse* tab grid, a double-click on the cell will immediately display the record in your *OpenForms* tab.



A click on the *Browse* icon (**A**) displays the browse tab. When open, this tab will appear as the last tab in the list of tabs (**B**), the difference with this tab is that the *Tab Navigation* icons are not present. *See the OpenForms Tab Navigation Control* on page 90 *for details about the Tab navigation icon.*



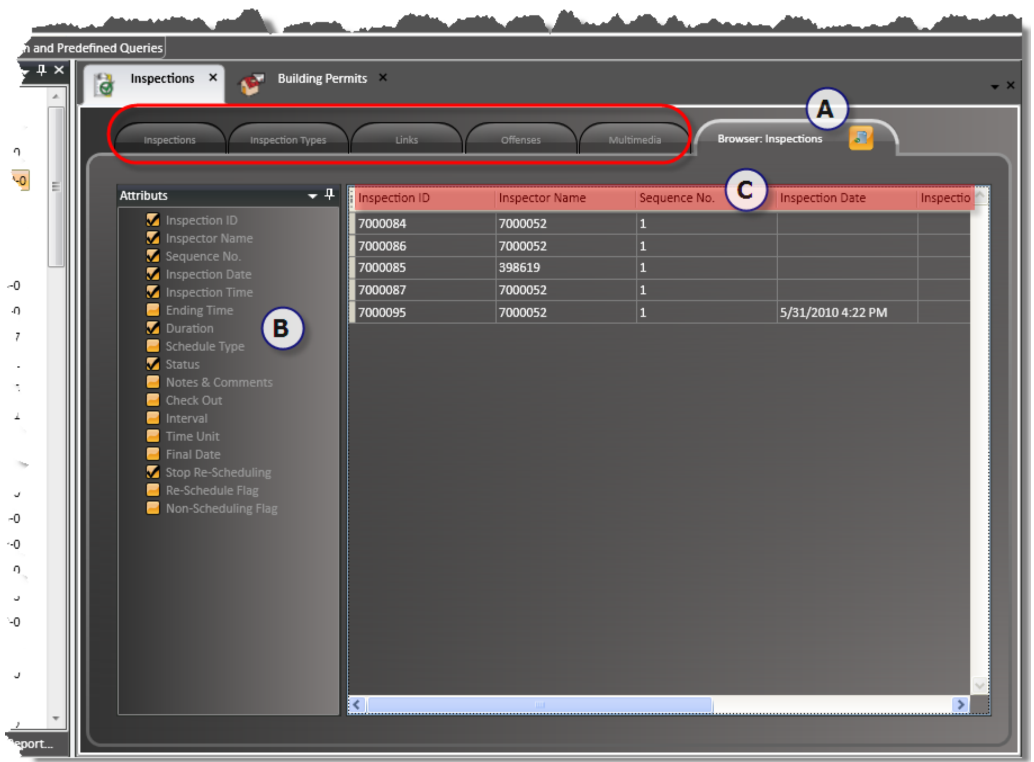
Note: There is no Tab Navigation icon after the Browse tab. When the Browse tab is open, you must either select a record from the list of available records, or cancel the tab.

To display the *Browse* tab...

1. Select a record containing multiple records. For this example we are using a tax map with inspection records.
2. Click Browse to view the inspections that are related to the tax map.

The inspection records are displayed in a grid in the Browse form.

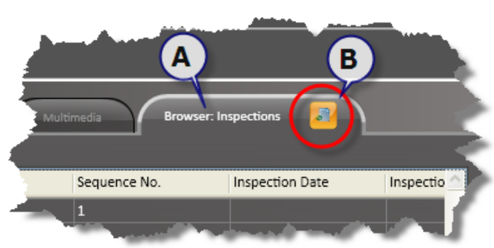
Browse tab form



The *Browse* tab form is made up of the tab (**A**), a pane with a list of attributes (**B**), and a data grid containing the records (**C**). The parts of the form are as follows:

Browse tab

The Browse tab (**A**) will consist of the tab name followed by the name of the OpenForm. In addition, you will see a **Close** form icon. Should you wish to close the *Browse* tab without making a selection from the grid, click the close icon (**B**).



To close a Browse tab...

1. On an open *Browse* tab form, click the **Close** icon.

When the browse tab is closed, you are returned to the *OpenForm* tab that the browse action was launched from.

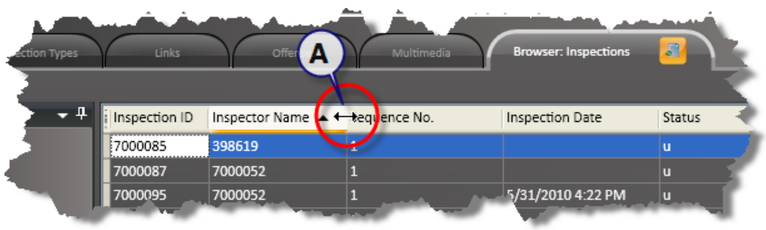
Browse tab - Attributes column

The Attributes column contains a list of attributes that are associated with the dataset that is being browsed. The list of attributes are the columns that are displayed in the grid on the right hand pane. When the attribute is selected, i.e. is selected with the check mark, the column is displayed.

To display or hide a column...

1. In a *Browse* form, go to the attributes pane (**A**) and click to select the column that you want displayed. A check mark indicates that the column will be displayed in the grid.
2. Click again to remove the check mark; this will hide the column in the grid.

Browse tab - Data Grid



Resizing Columns

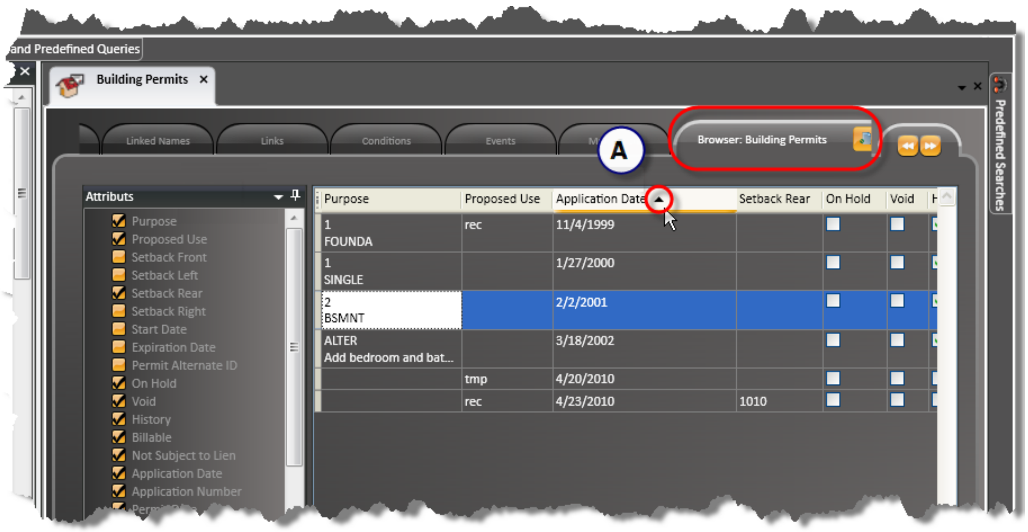
The data grid columns can be resized to, optimized the space available, or view additional information that may be hidden be a column that is too narrow.

To Resize a column...

1. Place your cursor at the border of two columns (**A**); the cursor will change to a double-headed arrow.
2. Click and drag to increase or decrease the column width.

Sorting Columns by Headings

Records in the *Browse* grid can be sorted by column headings (**A**) in ascending or descending order.



To sort records according to a column heading...

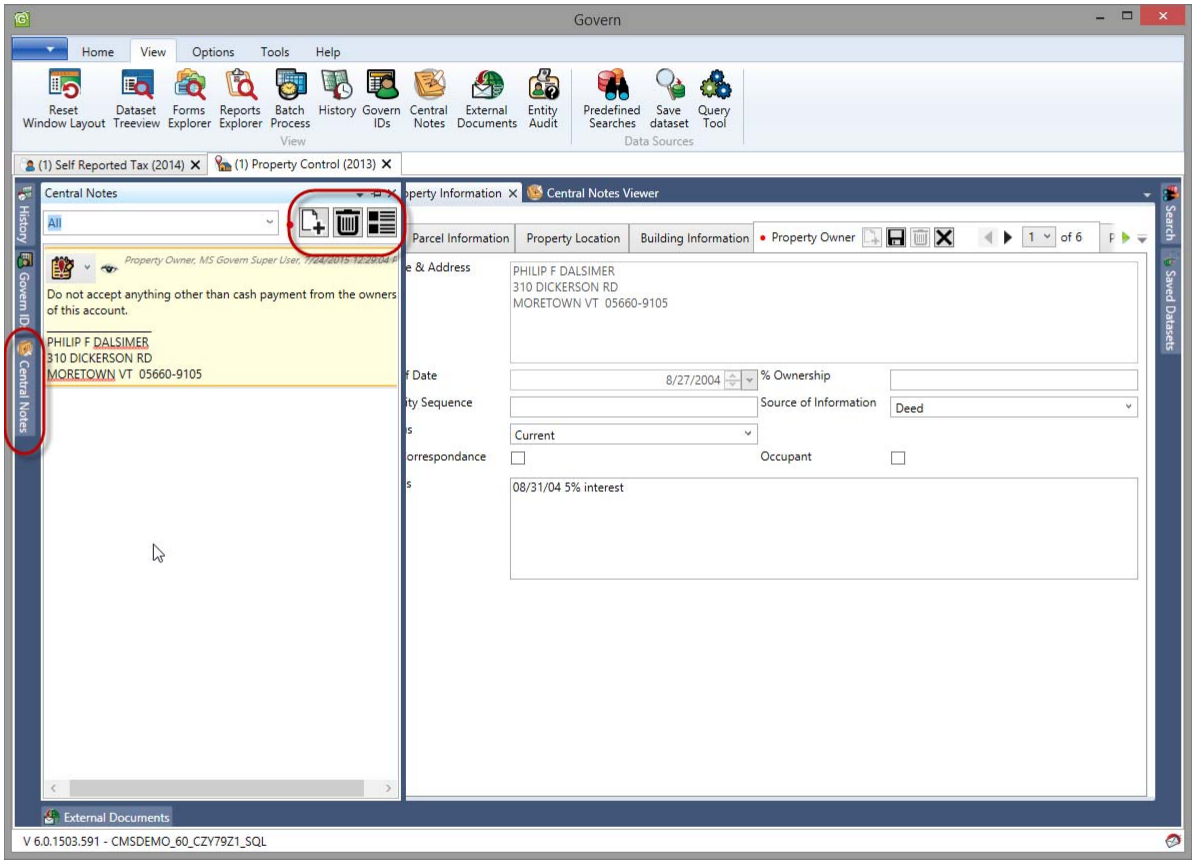
1. under the Attributes column, click to select the columns that you would like displayed in the grid.

> **Note:** It is recommended that you deselect the columns that are not relevant to you so as to minimize the amount of space used by the columns.

2. In the *Browse* tab form, locate the column headng that you would like to sort the grid on.
3. Click once on the column head; all data in the grid will sort to that column head. The direction of the arrowhead in the column head will indicate the direction of the sort.

When the arrowhead is pointing upward, the sort is ascending, when the arrowhead is point downwards, the sort is descending. A click on the column heading will switch between ascending and descending.

Central Notes



Central Notes are designed to allow users to enter and store notes in a centralized storage location. When used, Central Notes enables users to maintain, and review, any notes that are entered when an action is performed, or when a modification is made.

User prompts for a central note entry can be made to occur at the entity level, or at the field level of a profile. This means that a user can be prompted to make an entry when they either access and make a change anywhere in the profile, or in a specific parameter in the profile. These settings are made by an administrator in the *Business Entity Designer* (**BED**) release 5.1 or greater. in addition Central Notes can be applied on a dataset basis, i.e. all records of a search result could have a note applied to them collectively.

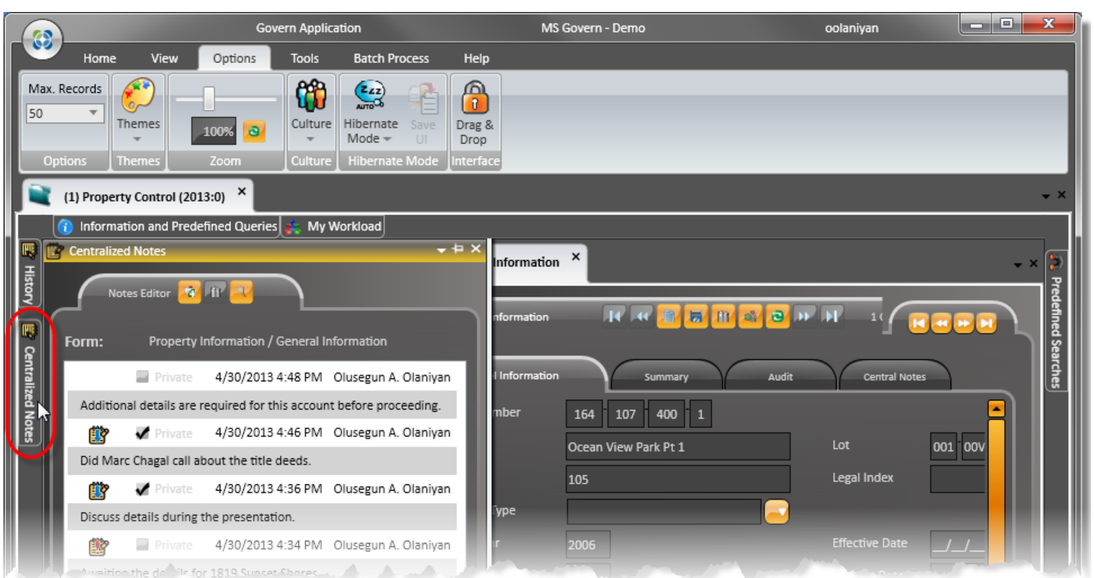
Note: Central Notes that are applied as a dataset are permanent, Notes applied to a dataset cannot be removed.

As an example, in the *Parcel Linking* profile if a new parcel link is created, or a modification is made to an existing *Start Date* or *End Date*, justification may be required for the action. This layer of security can be provided with the *Central Notes System*. When enabled, the user will not be able to complete the action unless an entry has been made in the Central Notes form. When entered and saved, the record of the username, change, and details is saved.

When a centralized note is entered, an optional flag can be assigned to it. A note can be entered with three (3) statuses. These statuses can be used as part of a search criteria. (Table: **PC_CENTRAL_NOTES**).

Locating the Central Notes pane

The *Central Notes* can be found by default as an *Auto-Hide* tab located on the left hand side of the Govern user interface. To display the note field, hover your pointer over the tab to display it. *Refer to Auto-Hide Panes* on page 9*of this guide for details about auto-hide panes.*



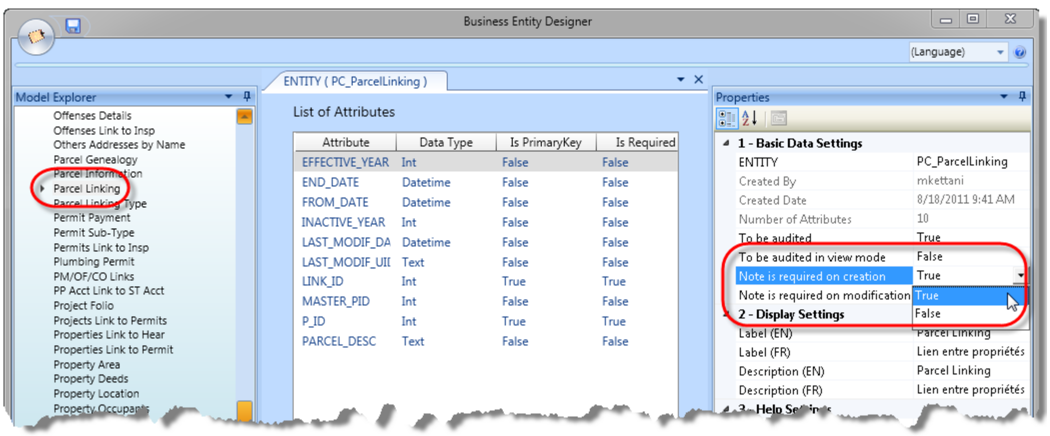
Enabling Central Notes

Creating an Entity Level Centralized Note requirement

At the entity level, when an entity is made or modified, the user will be required to enter a centralized note entry.

To set up an Entity level *Central Notes* entry request, you will need to make changes using the Business Entity Designer (**BED**) release 5.1 or greater. *Refer to the BED release 5.1 guide for details about modifying Business Entities* (**BE**'s)

1. In the BED release 5.1, under the Model Explorer pane, click on the *Business Entity* that will require a Centralized Note entry; for our example we will use *Parcel Linking*.
2. Under the *Properties* pane on the right hand side under *1 - Basic Data Settings*, set the **Note is required on creation** flag to **True**.



3. Set the **Note is required on modification** flag to **True**.
4. Click **Save**.

When the flags are set at this level, i.e. the *Entity* level, a *Centralized Note* entry will be required to create a new parcel link entry.

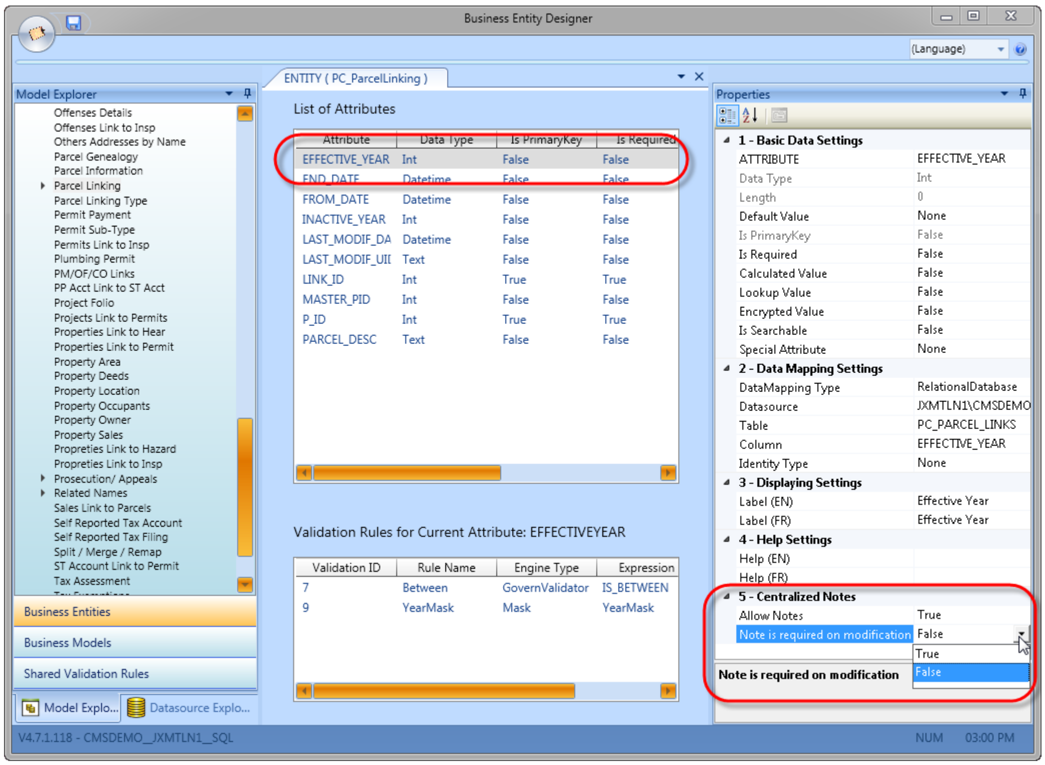
Creating an Attribute Level Centralized Note requirement

At the Attribute level, in order to enter a note, or when a modification is made to an attribute, i.e. field, a note entry will also be required to be made.

To set an attribute level Centralized Note entry request...

1. In the BED release 5.1, under the Model Explorer pane, click on the *Business Entity* that will require a Centralized Note entry; for our example we will use *Parcel Linking*.
2. In the central area under the *List of Attributes* pane, select an attribute that you want the user to be prompted with a *Centralized Note* entry request; for our example select the **END_DATE** attribute.

3. On the right hand side, locate the Central Notes property, set both the **Allow Notes**, and the **Note is required on modification flags** to **True**.
4. Repeat the above steps 2 and 3 for the **FROM_DATE** attribute.



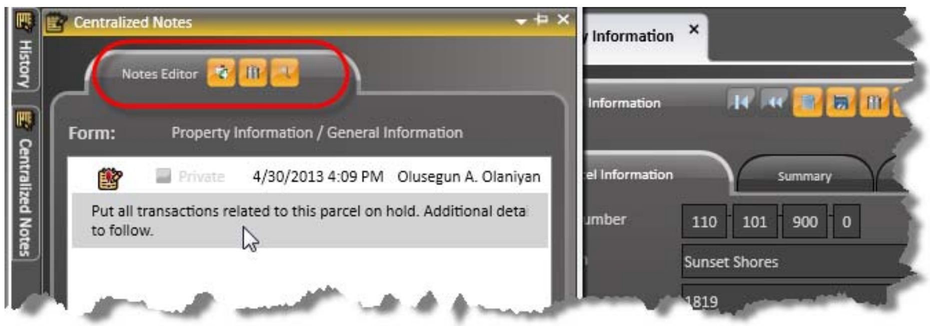
About Entity / Attribute Level Centralized Note requests

Users that are enabling Central Notes for Entities and Attributes should note that the request for a Centralized Note entry by the system are separate. This means that if the flags are set at both the Entity and Attribute level, a separate prompt for a Centralized Note entry will be issued by the system.

Central Notes pane

The Central Notes pane is used to enter and display the notes that are related to the selected parcel. These tabs are used to enter and view the Central Notes, as well as controlling what notes are displayed after a search, through a series of user selectable filter fields.

Central Notes tab



The *Central Notes* tab is the location where notes are entered, edited, and viewed.

Central Notes tab - Command Button(s)

Add New Note: Click **Add a New Note** to create a new *Centralized Note*. A new note is created with a date and time stamp, and the name that the user logged in on.

Delete Selected Note: To delete an existing *Centralized Note*, click to highlight the required note and click **Delete**.

Notes Viewer: Click to display the *Notes Viewer*. This form is used to view existing notes and perform queries to displays results based upon selected criteria. For example you can filter your results based upon a high priority flag, or between a set date range.

Notes Viewer form

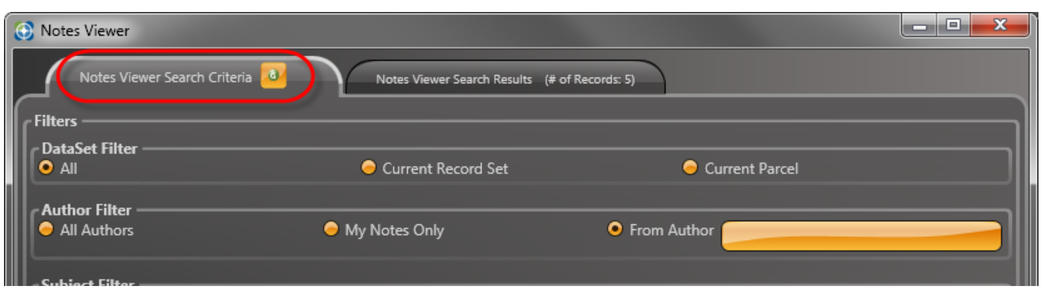
With a click on the *Notes Viewer* button in the *Central Notes* pane, the *Notes Viewer* form is displayed. This form contains two (2) tabs, one for defining your search parameters, and the other for displaying the search results.

Note: by default when the Notes Viewer button is clicked, the Notes Viewer form is displayed with the Notes Viewer Search Results tab.

Notes Viewer Search Criteria tab

In the *Notes Viewer Search Criteria* tab, you are able to search the Govern system for existing notes. The results of the query are filtered based upon your search parameters.

Central Notes Management tab



Notes Viewer Search Criteria tab - Command Button

Retrieve Notes: Click **Retrieve Notes** to perform a search of the *Centralized Note* based upon the Filter options selected.

Notes Viewer Search Criteria tab - Parameters

The following is a description of the parameters that are found under the *Notes Viewer Search Criteria* tab.

Filters group

Dataset Filter group

Selections in the Dataset Filter group will restrict the display of notes to those within the current dataset.

All: Click All to display all notes in the current dataset.

Current Parcel: Select this option to display notes that are restricted to the current parcel.

Current Name: When Current Name is selected, only the Central Notes that were created on records that are linked to the current name account.

Author Filter group

All Authors: Select this filter option to display notes from all authors under the Author list. (TABLE: USR_USERFILE)

My Notes Only: When selected, this option will display only notes made by the current logged in user.

From Author: Click to select the From Author option; this will display the notes entered by the author that is selected from the drop down menu.

Note: The drop down menu list will not be active unless the option is selected. When this option is selected, but no author is selected, a warning will be displayed requesting that an author be selected from the list.

Subject Filter group

Entity Name: Click to select an Entity Name from the drop down list; the notes that are displayed are the ones that are related to the Entity.

Control / Attribute: Select the *Control / Attribute* option to filter for the *Control* or *Attribute* that is associated with the selected control or attribute

Note: This option is not active unless an *Entity Name* has been selected.

Table Name: Click to activate and filter *Central Notes* that are associated with the selected table name.

Column Name: After selecting a *Table Name*, you can further filter down and display *Central Notes* associated to a selected column name.

Note: This option is not active unless a *Table Name* has been selected.

Date Filter group

Fiscal Year From / Fiscal Year To: Enter the Fiscal Year range of interest in the From and To fields.

Entry Date From / Entry Date To: Enter the date range of the Central Notes that you would like to view.

NEW! General Filter group

Note Priority: When a priority has been assigned to a Centralized Note, use this option to filter the search results for a specific priority. If no priority is selected, the all notes will be specified.

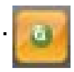
Exclude Private Notes: Select this option to exclude all notes that have been assigned with the *Private Notes* option.

Searching for Central Notes

Users with access to *Central Notes* can perform a search on all notes entered in the system. The search can be by parcel, name, or by author, for a given entity or attribute.

To perform a search for *Central Notes* that have been entered in the system:

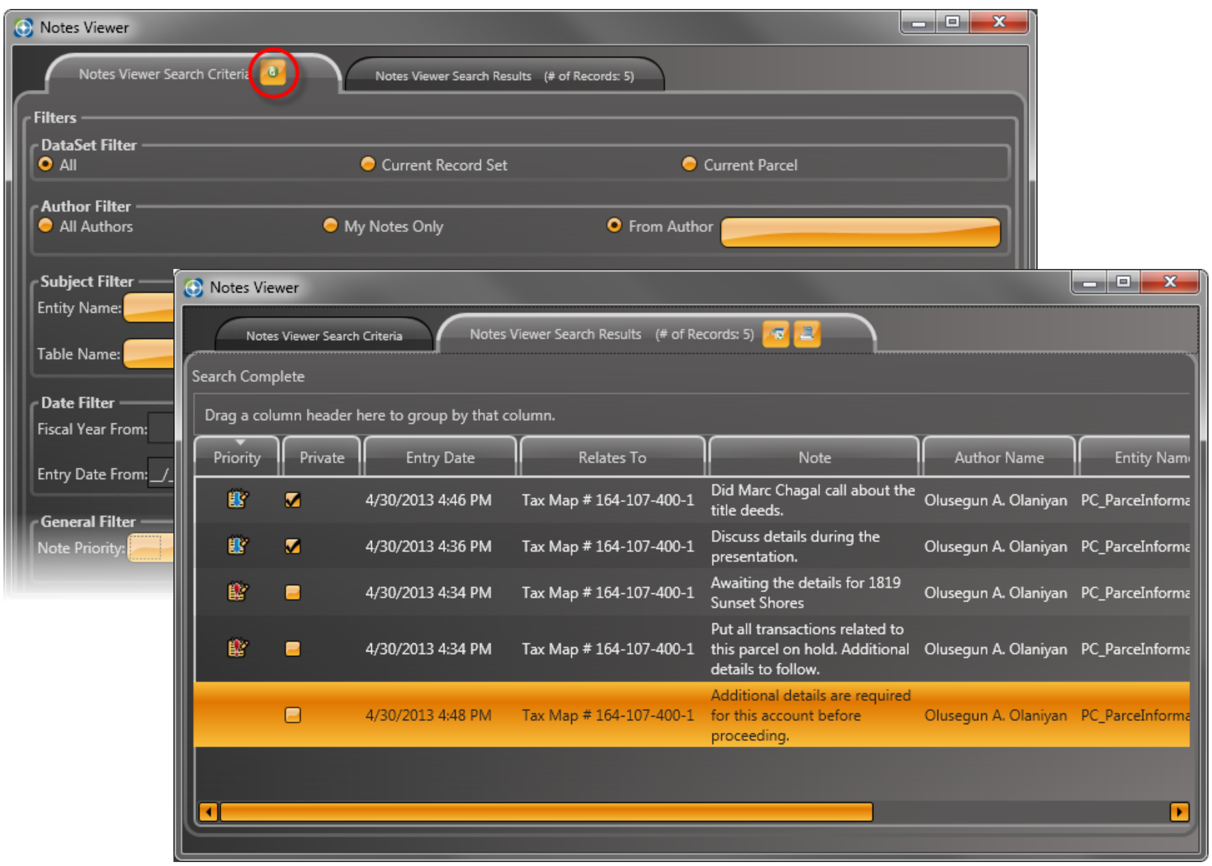
1. Click to display the *Central Notes* auto-hide pane.
2. Select the *Notes Viewer Search Criteria* tab.

3. In the **Filters** group, select each criteria required from each of the filter groups.
4. If required select a priority note from the **General Filter** group.
5. Click **Retrieve Notes**. 

Notes Viewer Search Results

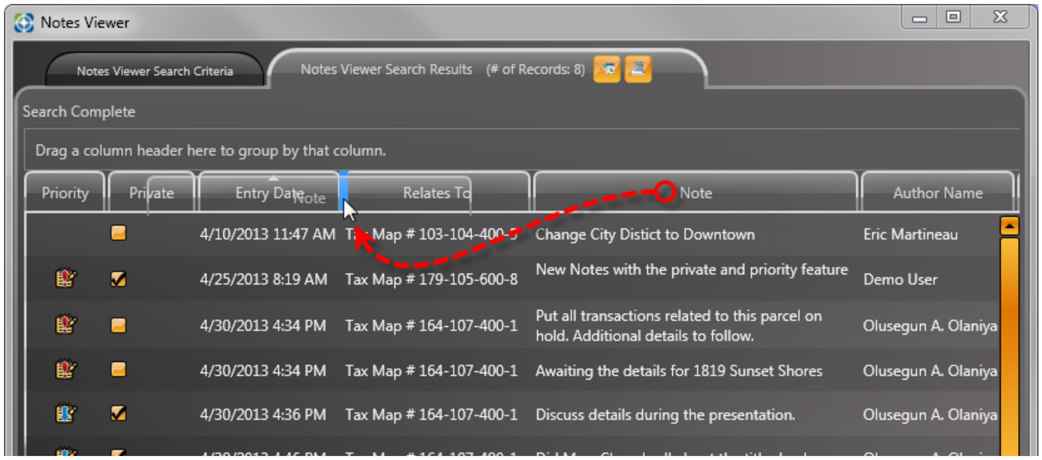
The search results will be displayed under the **Notes Viewer Search Results** tab.

Notes Viewer Search Results



As indicated earlier, the *Notes Viewer Search Results* tab displays the results of search queries based upon selected filters. The columns displayed can be re-arranged with a drag and drop action.

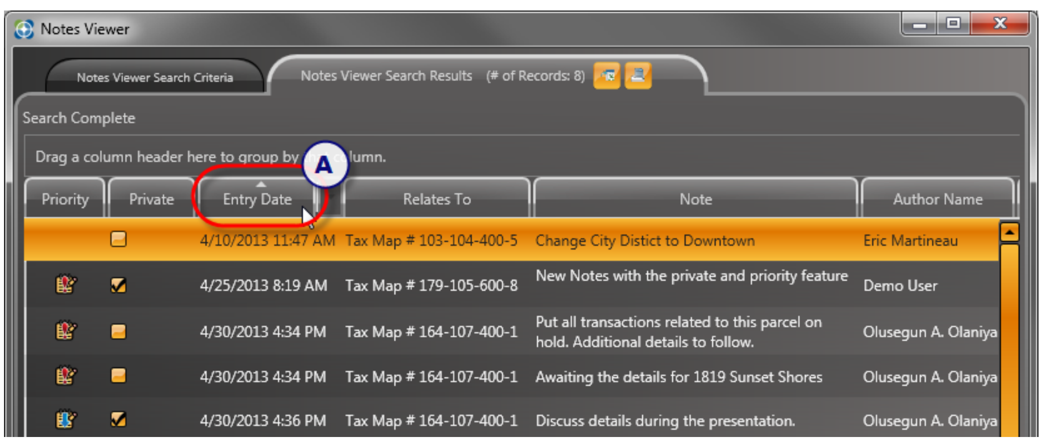
To re-arrange columns under the *Notes Viewer Search Results* tab:



1. Click and hold the pointer on the column title.
2. Drag the column title to its new location, noting the insertion point between columns. The insertion is indicated by a bright vertical bar.
3. Release the mouse button to complete the insertion.

This drag and drop customizing feature can be used to set up columns with results that are required for your output file.

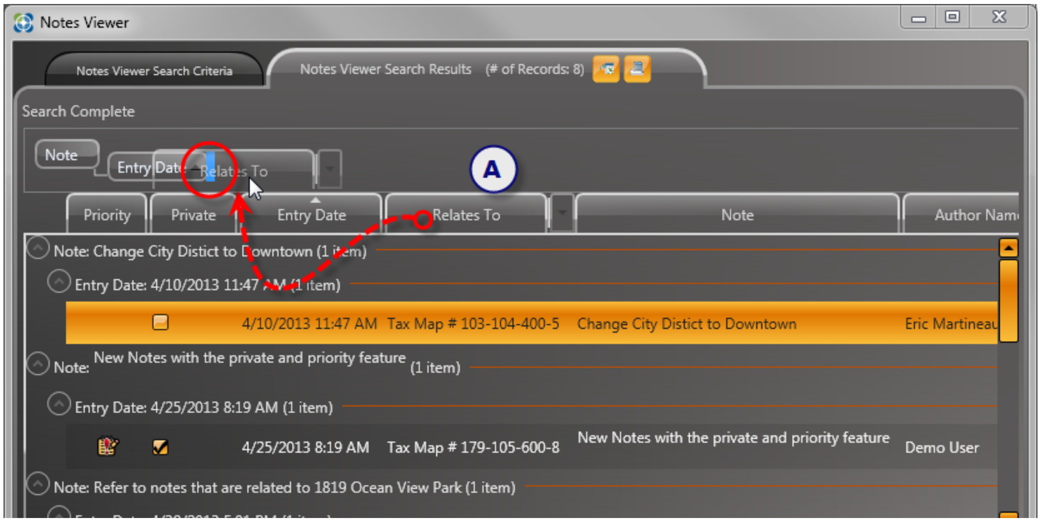
Sorting by Column Headings



To sort by columns headings, click on the column header (**A**). A sort arrowhead is displayed indicating the direction of the sort. The first click will display an increasing order sort, the next click will be a decreasing order sort, a third click will remove the sort by that column.

Grouping by Columns

The Central Notes drag and drop feature also allows for grouping by column heading. The space above the columns titled **Drag a column header here to group by that coloumn** is referred to as the *Grouping Area* (**A**). This space expands to accommodate column names as they are added.



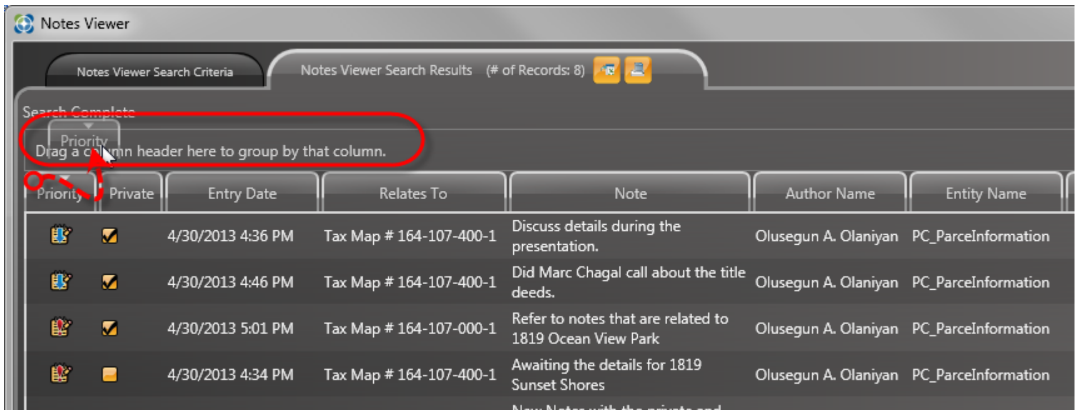
For example, if we have the following columns headings...:

- Priority
- Private
- Entry Date
- Relates To
- Note
- Author Name

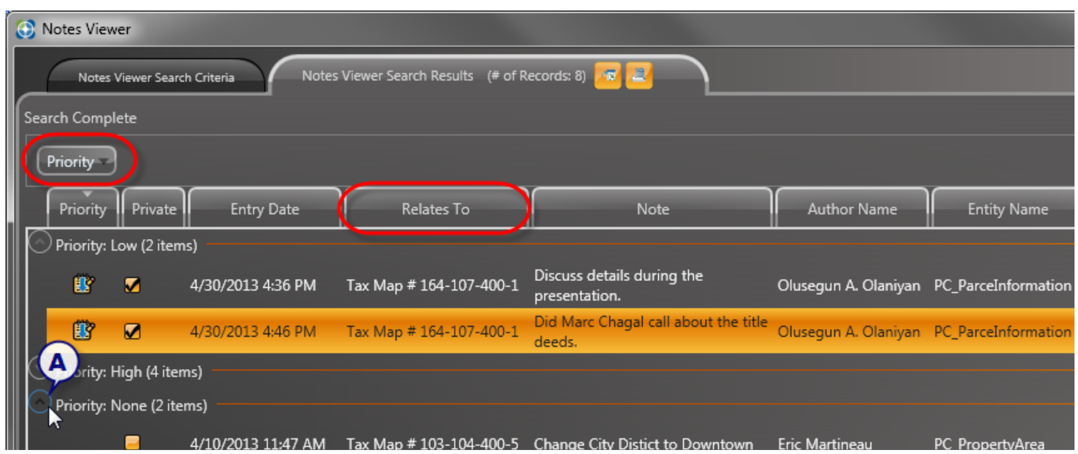
We may want to view the entered notes grouped according to the **Priority** (**A**).

To group according to the **Priority**:

1. Click and drag the *Priority* column into the *Grouping Area* above the columns; when empty this area is marked"**Drag a column header here to group by that column**". Drop the column heading on the *Grouping Area*.



2. You will note that the data has now been grouped according to the *Priority* column. You will see a heading that indicates the column grouping, the item that it is being displayed under, and the total number of items under that grouping. Click on the "^" beside the column grouping (**A**) to expand or contract the content listed.



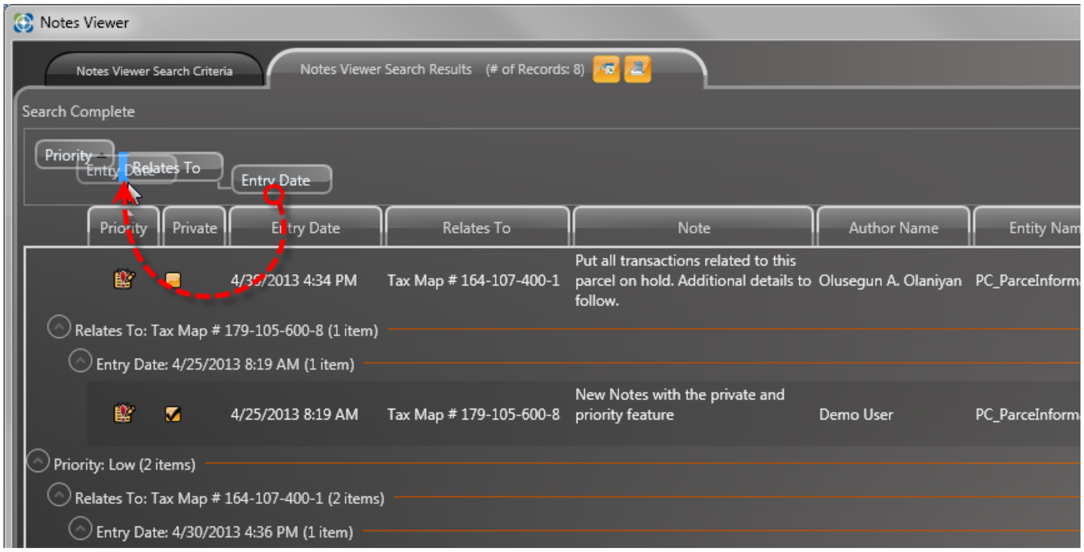
Multiple columns or attributes can be grouped by dragging and dropping them into the *Grouping Area* above the column headings. Additional columns will appear as subgroups within the original group.

The order of the groups and subgroups can be changed with a drag and drop procedure.

To re-arrange subgroups:

1. Click and hold the pointer on the subgroup title.

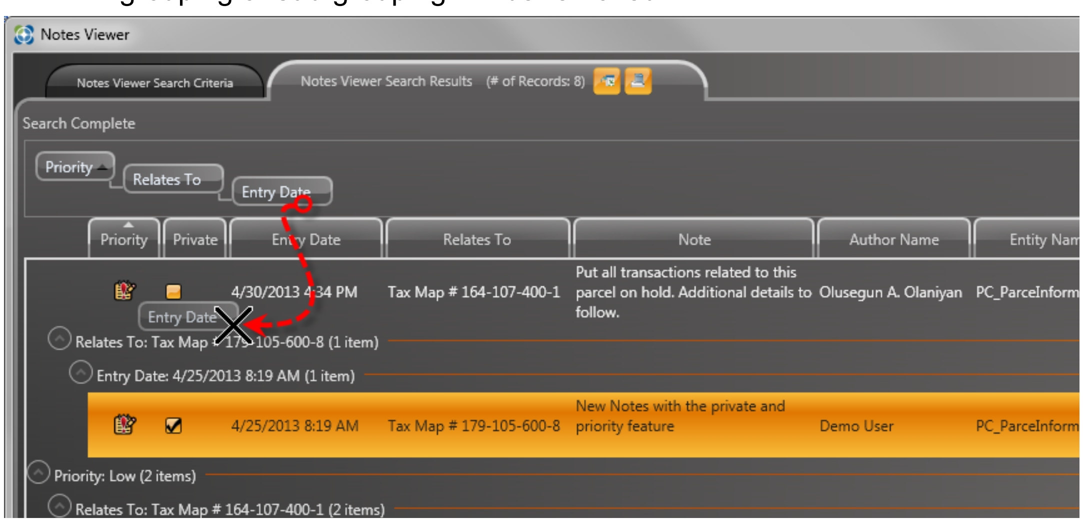
2. Drag the title to its new location, noting the insertion point between the subgroups. The insertion is indicated by a bright vertical bar.
3. Release the mouse button to complete the insertion.



Removing Column Groupings

To remove column groupings from the *Grouping Area*:

1. Click and drag the grouped or sub-grouped title to an area outside of the *Grouping Area*.
2. When an 'X' appears, release the mouse button to drop the object. The grouping or sub-grouping will be removed.



Viewing Central Notes Search Results

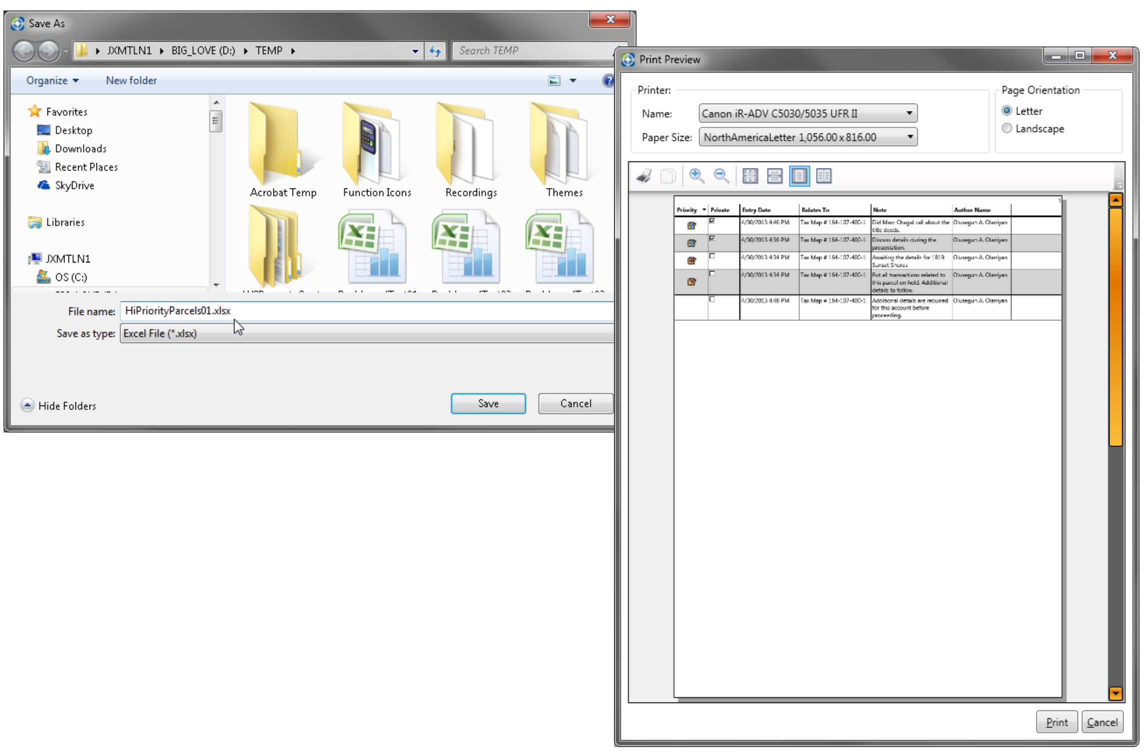
After result have been generated, there are two (2) options available to view the results; export results to an Microsoft Excel spreadsheet, Print with a preview.

Notes Viewer Search Criteria tab - Command Button

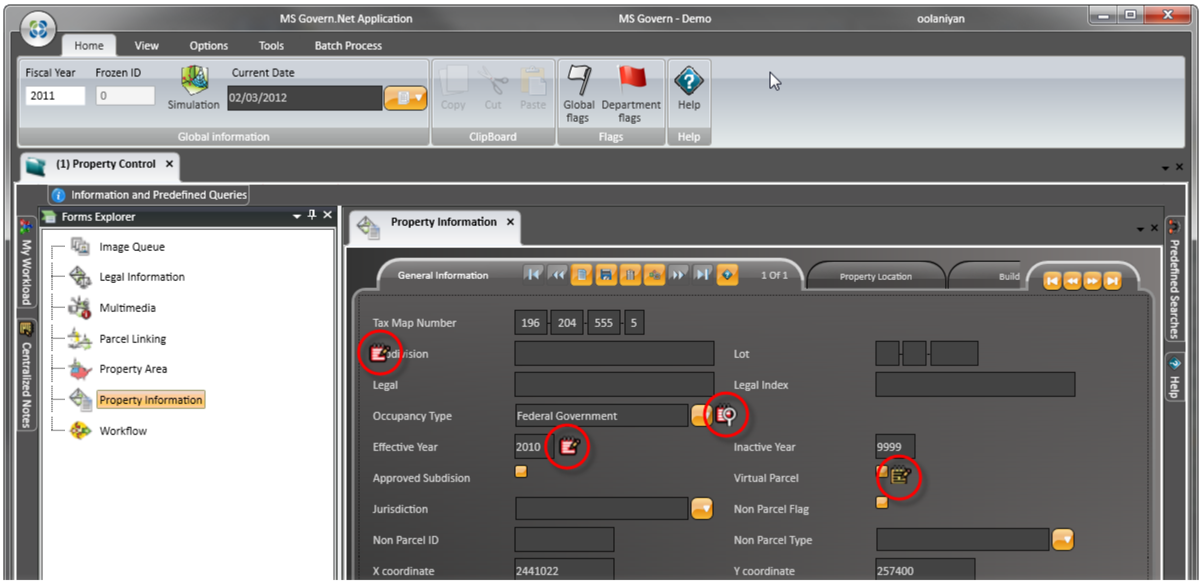

Export to Excel: When **Export to Excel** is selected, the current search result grid will be exported as an Microsoft Excel spreadsheet.

Note: The Excel export will not be affected by the sort order or grouping; the columns are output in the default order of the system.


Print Preview: Click **Print Preview** to display a preview of the current search result grid.



Behavior of Central Notes when enabled in Govern



When Central Notes are enabled, fields that have the Central Notes enabled through the Business Entity Designer (**BED**) will have icons that flag the state of the field.

Central Notes Status Icons

Central Notes fields are indicated with *Notepad* icons that lets the user know their status. **Red** icons indicate that note entries are required, i.e. mandatory; **Gold** icons are an indication that note entries are optional:

Allowed: The yellow icon indicates that entry of notes is optional for the user.

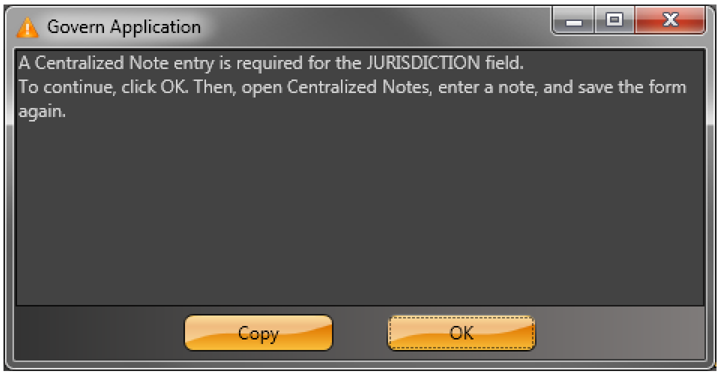
Required: This indicates that any changes to the field involves a mandatory note entry

Exists and Allowed: The yellow icon and magnifying glass indicates that notes exist in the system, but they are optional for the user.

Required and Exists: The red icon and magnifying glass indicates that a notes exist, but mandatory entry is required for changes by the user.

How to make a Centralized Note entry

Users that are attempting to save a record when the field is set as Required will be presented with the following error window:

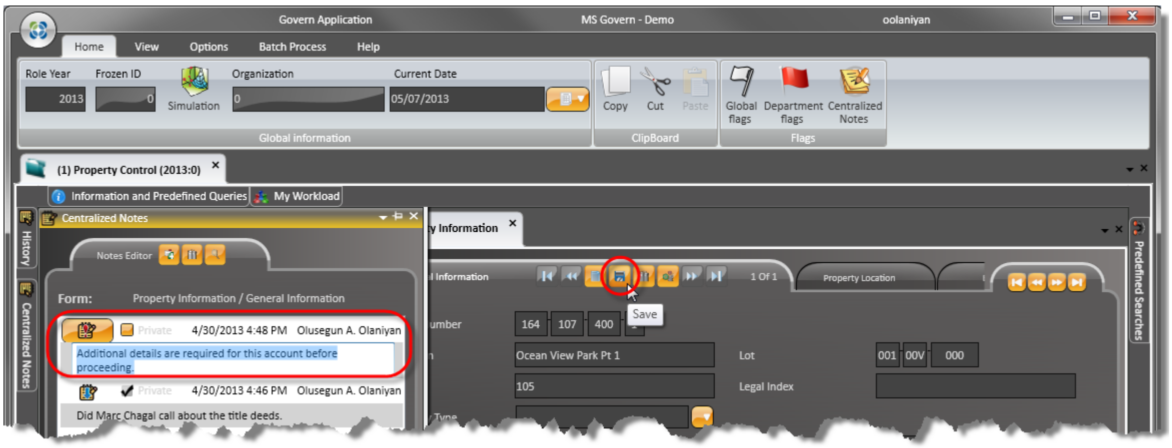


To resolve this situation...

1. Click **OK** to acknowledge the notification.
2. Locate the Central Notes auto-hide tab; place your pointer over the tab to display it.
3. Click **Add a New Note**.

Note: When a new note is created, the date, time, and user log-in name is displayed for reference.

4. Click in the note field and enter your note
5. When complete, click **Save**.



As long as the Centralized Note is created and the reason for the creation or change, i.e. “justification” is entered, the system will them allow a save.

Creating a Centralized Note for a Dataset

WARNING: A *Centralized Note* that is applied to a dataset cannot be modified or deleted. Take care when making your entry

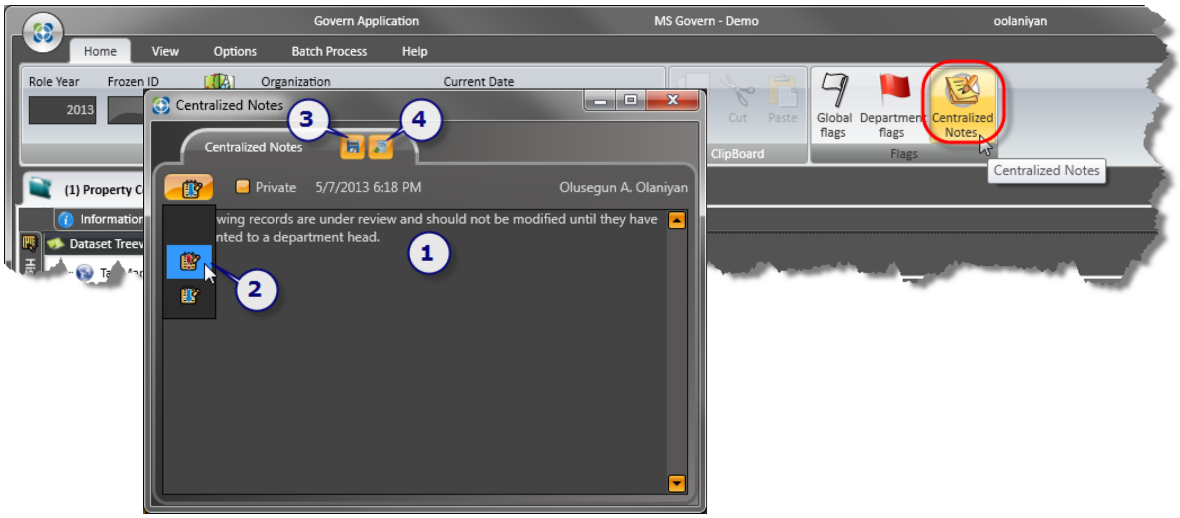
Creating a Centralized Note for a Dataset, i.e. a group of records that are the result of a query, hand picked records, or appended list, is a similar procedure to applying one to an individual record.

Note: In order to be able to click on the **Central Notes** button, you will need to open a *Profile*, then perform a search.

To create a *Centralized Note* that will apply to a dataset...

1. Perform a search; the resulting records will be the dataset.
2. Load the *dataset* into the *Dataset Treeview*.
3. If not selected, click the **Home** tab in the *Govern Ribbon*.

4. In the *Flags* group, click to select **Central Notes**.



5. In the Central Notes form, enter your notes that will apply to the dataset (**1**).
6. Select a *Priority* status, and select the *Private* option if the note is to be set as private (**2**).
7. Click **Save** (**3**) to create the note or **Cancel** (**4**) to stop the creation process.

Central Notes for *Datasets* are saved in the same table as the individual record notes, (Table: **PC_CENTRALIZED_NOTES**), the exception here is that these notes are permanent, i.e. they cannot be deleted.

Modifying a Centralized Note

Note: Access to the Govern Security Manager (GSM) is required in order to change the settings of security flags.

Once a *Centralized Note* has been created, the author or creator of the note can modify their entry. In addition, with the correct security flags set in the *Govern Security Manager* (**GSM**), an author can modify all *Centralized Note* entries.

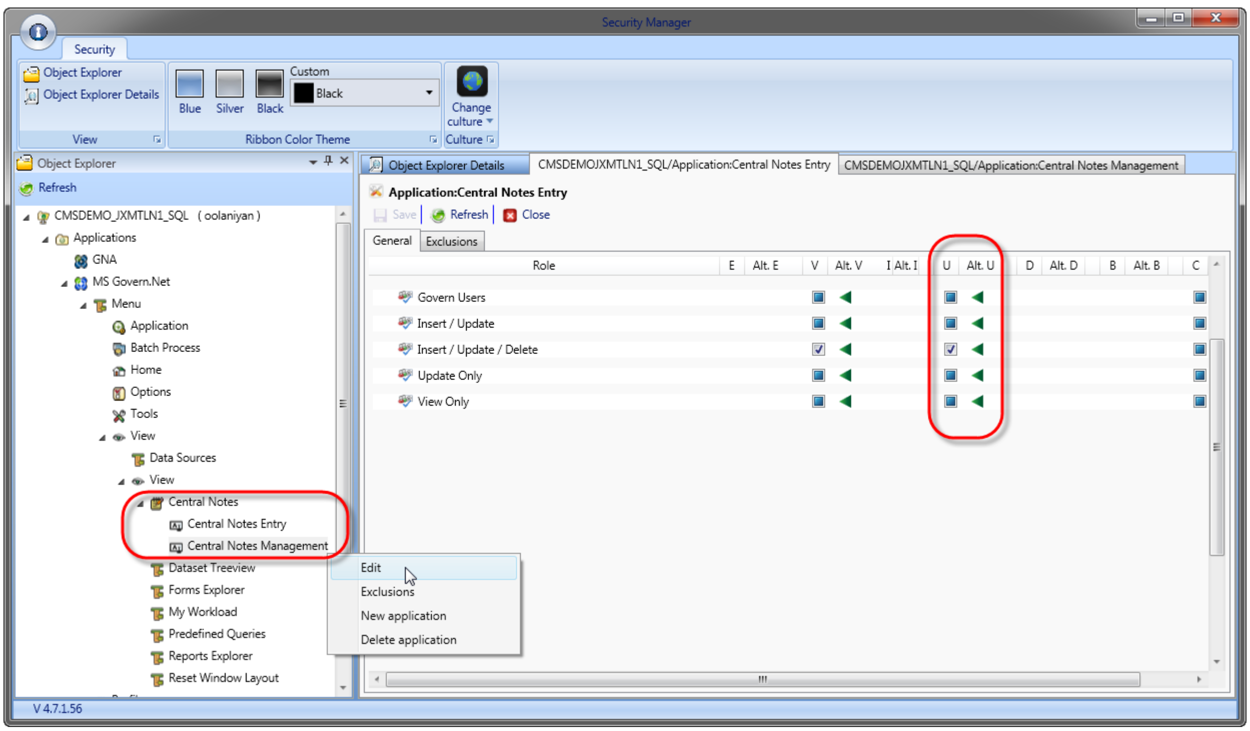
To modify a *Centralized Note...*

1. Display the *Centralized Note* pane.
2. Select the note and effect any required change.

To enable a *Centralized Note* author to be able to edit all notes...

1. In the *GSM*, ensure that the permissions flag for Update (**U**) has been set; *refer to the Working with Central Notes section of the GSM 5.1 user guide*.

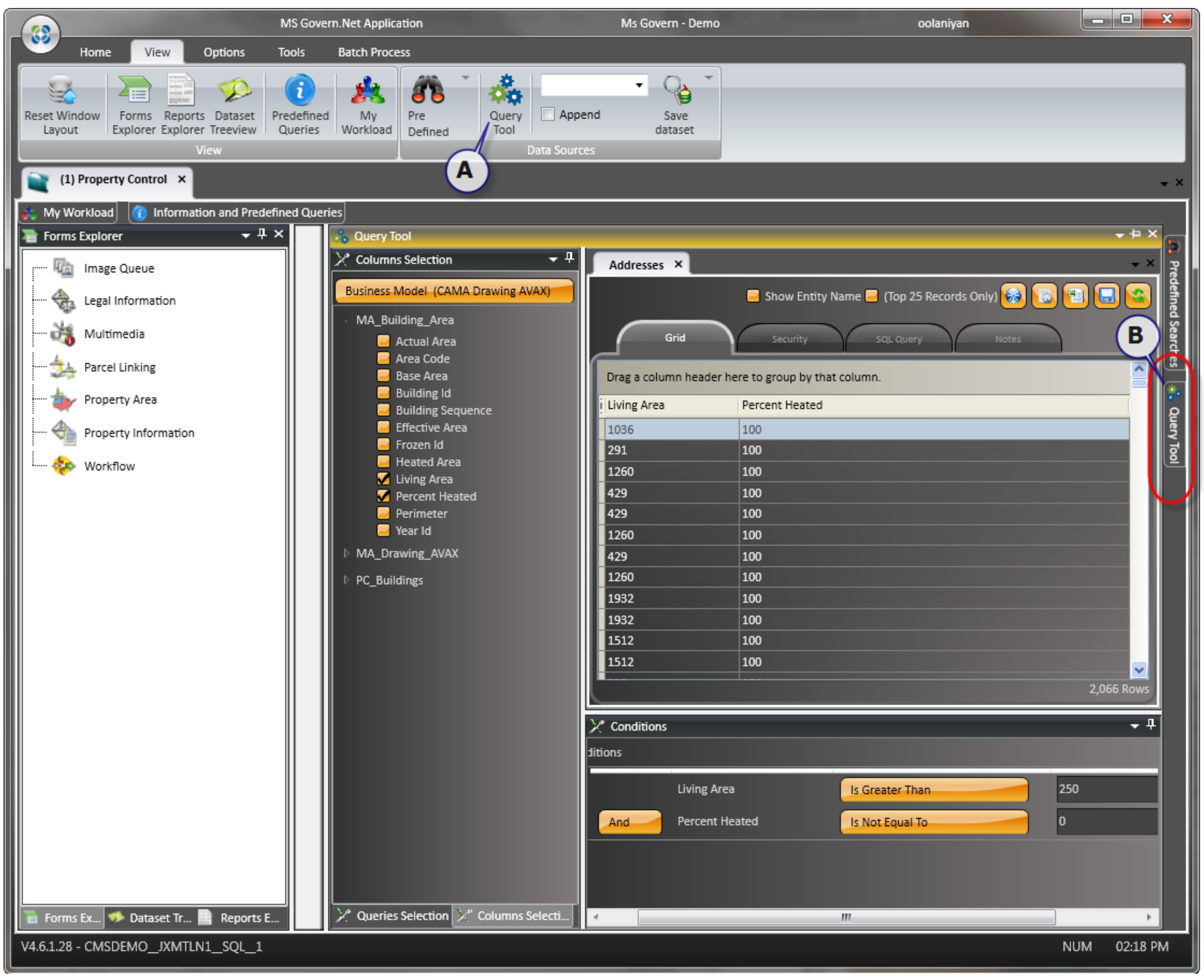
Note: If the update flag has not been set, the author will only be able to change the notes that they created, and no others. Refer to the GSM release 5.1 for details on *Working with Central Notes*.



QueryTool Component interface

Overview

The *Query Tool* (**A**), (**B**) is an integrated database query application that allows you to build customized *Standard Query Language* (**SQL**) queries with a drag and drop *Graphical User Interface*. Although no prior knowledge of *SQL* queries is required for using the *QueryTool*, an understanding of the *AND / OR* logical operators, and conditional operators like *Greater Than*, and *Less Than*, etc. are a requirement.



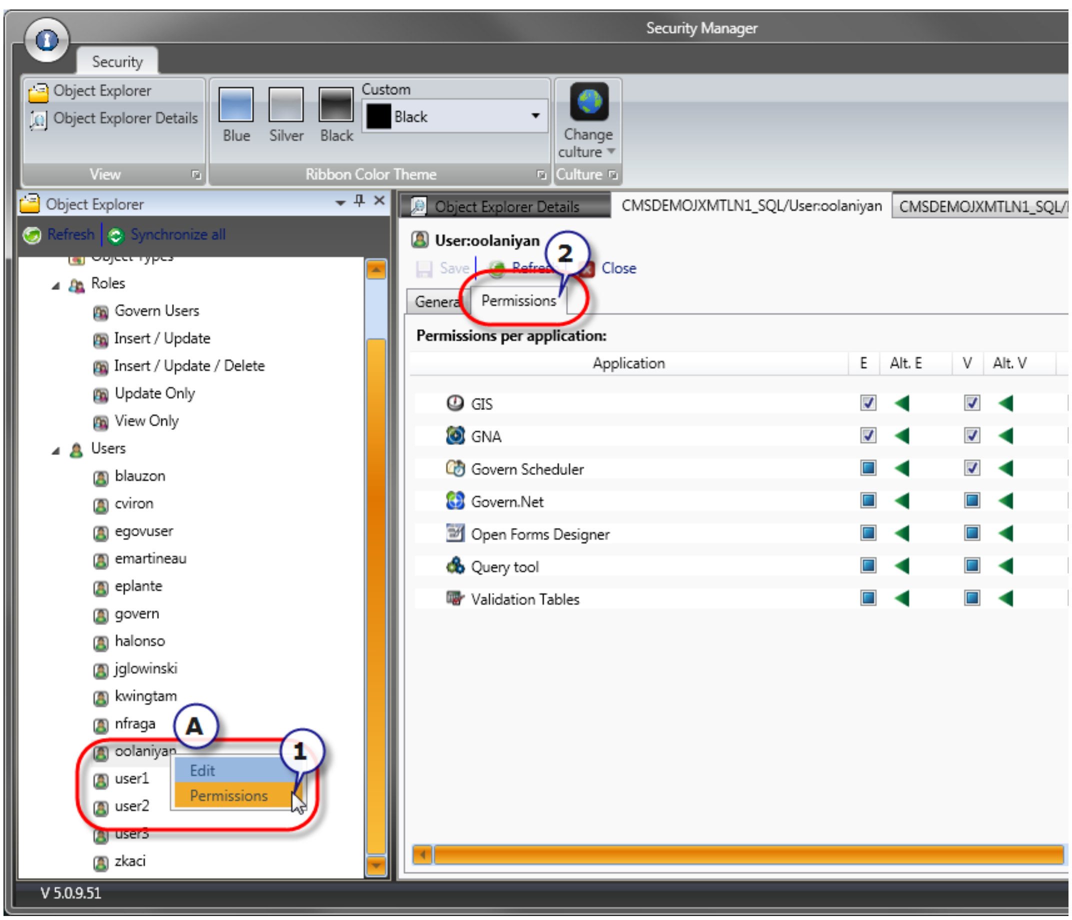
For details about the QueryTool component, refer to the QueryTool Rel. 5.1 user guide for additional details.

Securing the embedded QueryTool

Should you not want your users to have access to the embedded QueryTool. You can restrict access with the Govern Security Manager (GSM). As with other features of Govern, access to the QueryTool can be restricted by role or by user.

To restrict access to the *QueryTool*...

1. Open the *GSM*.
2. For this example, access will be restricted for a specific user; expand the *Users* icon; right-click on the specific user (**A**) and select the *Permissions* option (**1**).

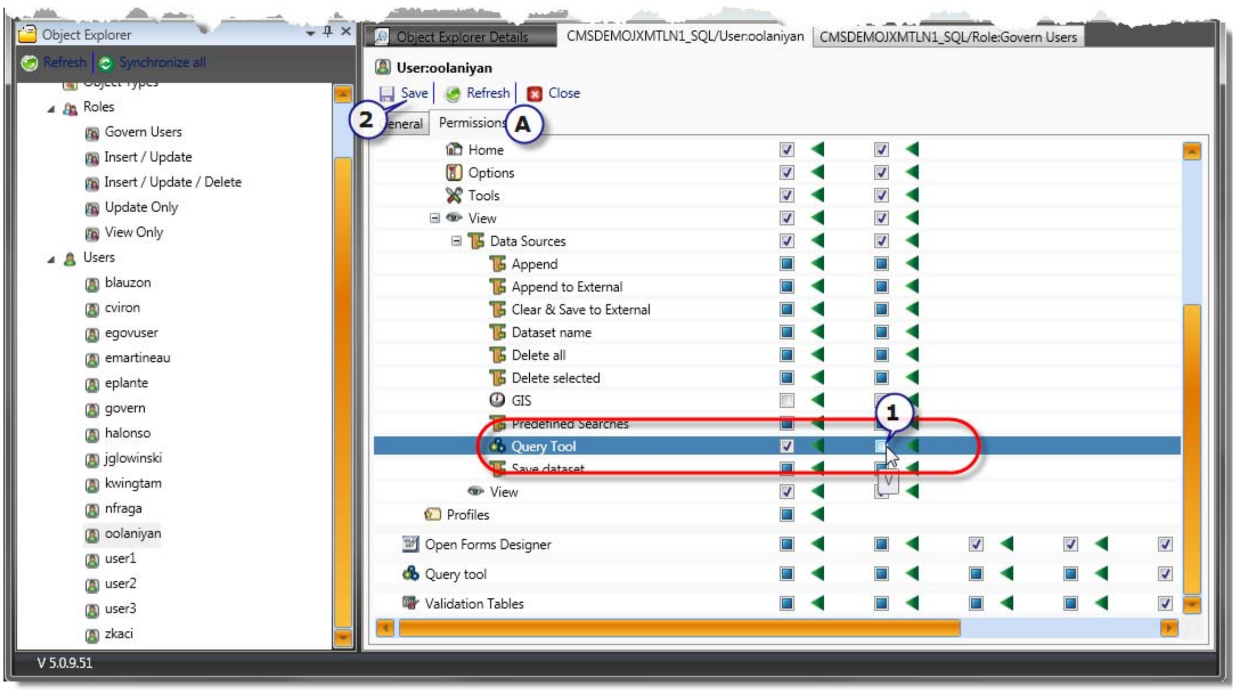


3. In the Object Explorers Details pane, under the Permissions tab (2), you will see the icon for the application, double-click to “drill down”.
4. Double-click on the View icon; go into Data Sources.

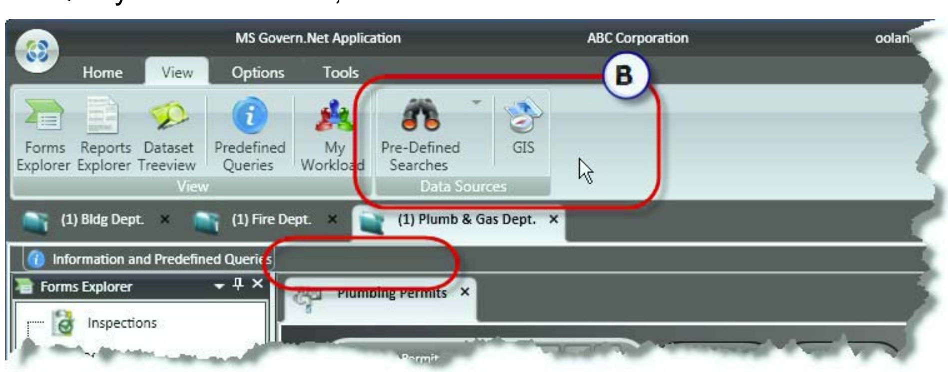
5. Under Data Sources you will see the QueryTool icon.
6. Uncheck the boxes under the E (Execute), and the V (Visible) columns of Query Tool.

Note: It is only necessary to de-select the V option because if the option is not visible, it cannot be selected.

7. Click **Save**.



8. After the changes have been saved, the next time the user accesses the *Govern* application, they will no longer see the option to select the QueryTool. In addition, the auto-hide tab will also be hidden.



APPENDIX A:Configuring System Help

Introduction

Installation of the *Govern Release 5.1* Help system is managed by the *Deploy EZ* application during the installation or update process. It is during this process that required directories are created and help content is updated. For the Govern application, unlike the Help system of the other applications in the suite, *Govern* help content is **not** invoked with the **F1** key. *Help* content is displayed with a click on one of the help icons (**A**) displayed under the **Help** tab (**B**) in the *Govern* application interface. The user selects the icon that corresponds to the profile, form, or entity of interest.

Note: Users can still invoke Help content with the F1 key in all other applications within the Govern suite. All help content that is presented to the user is contextual, i.e. relevant to the active user screen.

Open Form Hierarchy

The Open Forms hierarchy is as follows with order of precedence decreasing from left to right.

The above hierarchy is reflected in the structure of the *Help* directories and subdirectories.

Changes to the Help Directory

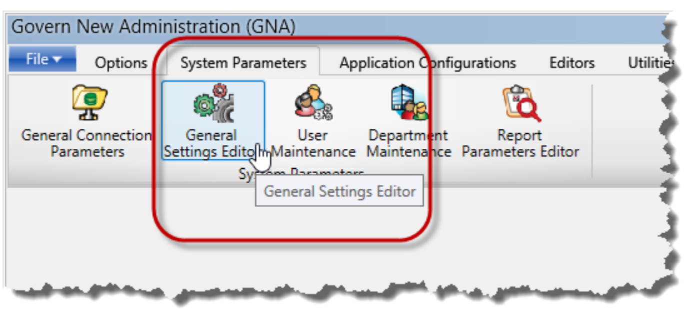
For *Govern Release 5.1* and greater, changes were made to the structure of the Help file directories. The new structure was created to be able to present users with help content in different file formats. Content can include video clips, user system supported file types, custom images, and so on. As with prior versions of the help, the Adobe Acrobat PDF file format is used to distribute the content.

For *Release 5.1*, help content is stored in multiple level directories. All standard content will be deployed as a ZIP archive file. Upon installation, the.ZIP package is then extracted to the *Standard* directory.

Help Content Directory Structure

The directory structure, as in previous releases, has two (2) principal subdirectories, **Standard**, and **Custom**. Both the *Standard* and *Custom* directory structures are set by the system and should not be modified by the user. The structure, and how the system will access the *Custom* directory can be determined by the user through settings in the *Govern New Administration* (**GNA**). There are two (2) options to choose from in the form.

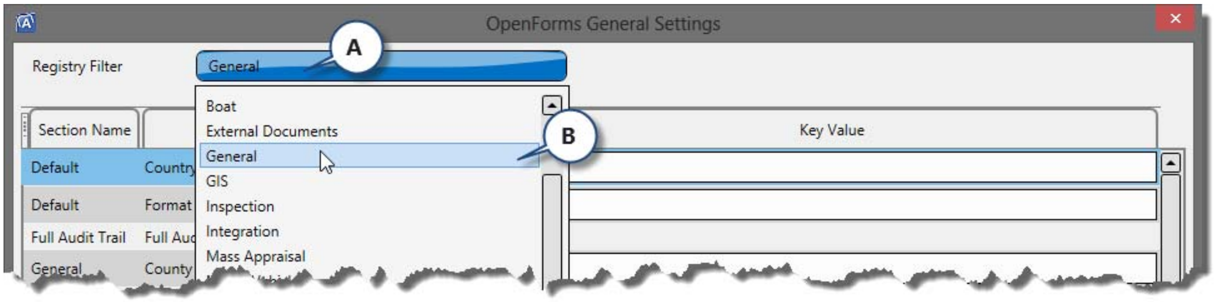
To open the form, in the *GNA*, select the *System Parameters* (tab) > **General Settings Editor…**

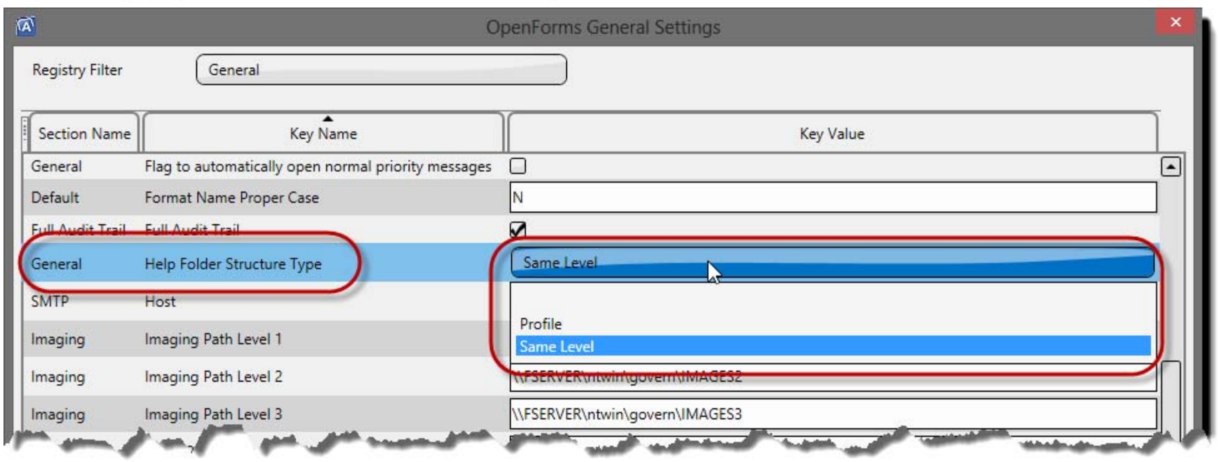


In the *Open Forms General Settings* editor, select the following:

1. Under the *Registry Filter*, select **General** (**A**).

2. Locate the **General** *Section Name* (**B**), available options are **Profile** or **Same Level**.





The selection of **Profile** or **Same Level**, are dependent upon user requirements.

Same Level option

Users that are content with the Property Control (PC) profile that is the system default should use the **Same Level** option. The same profile will be used by all departments, i.e. the same Open Forms will be accessible to all users. All users will be viewing the same help content for the active forms.

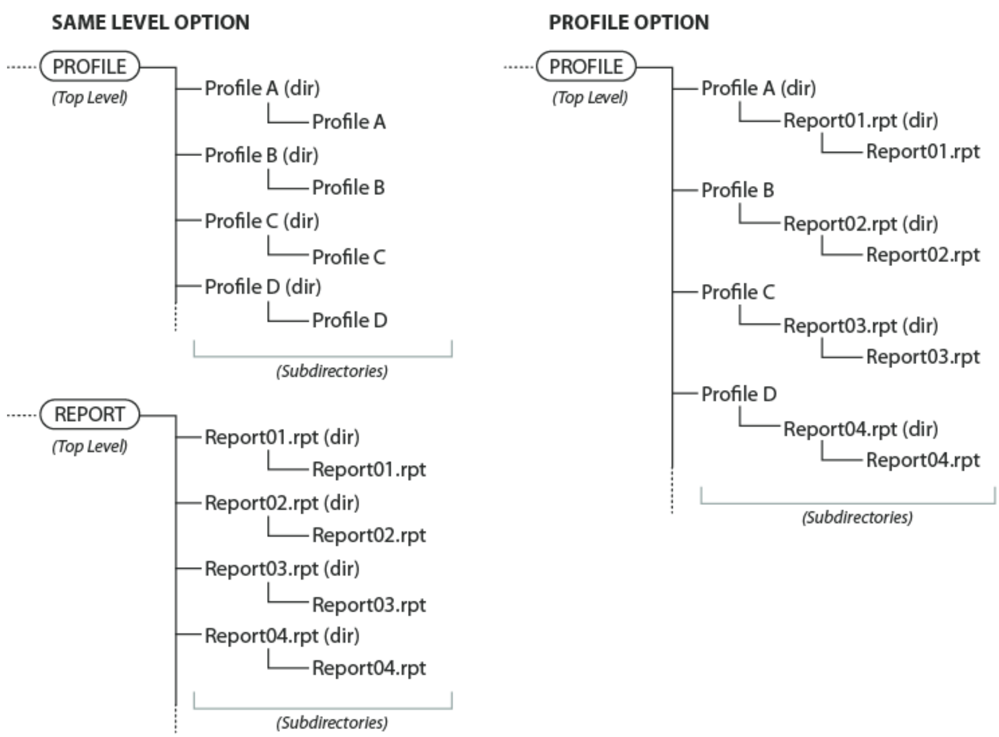
Note: The **Same Level** option is the system default.

Profile option

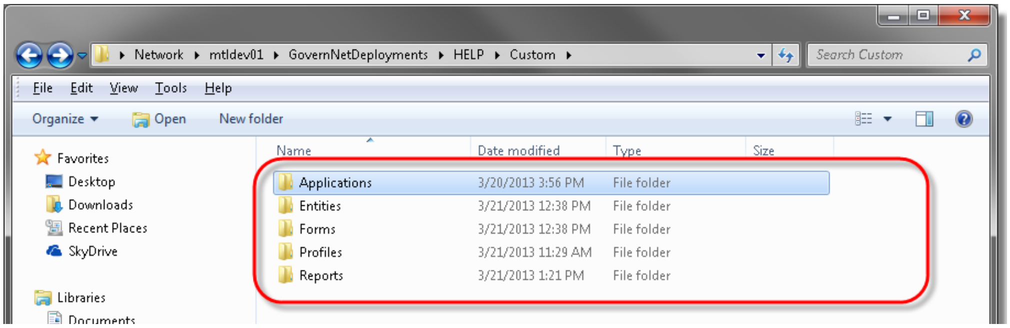
In situations when different profiles are required for the same, or different departments customized profiles will need to be designed. For example, a *PC* profile that is created for the *Assessors* department may not necessarily be the same one used by the *Public Works* department. As the Profiles and

Forms are different, the *Help* content may not be the same. Some confusion regarding functionality may arise unless specific instructions are provided. In this situation, the option for **Profile** should be selected. With the *Profile* option, content is placed in a separate directory that corresponds to each customized profile.

Note: Changing the parameter after the directory structure has been established is not destructive to the custom help content, but it will no longer be available until the settings are restored.



Help Content Directory Structure



As illustrated in the grid below, the structure of the Help directory is multi-leveled. The **<HELP ROOT>** refers to the root level of the help directory, and not the actual deployment installation of the *Deploy EZ* application.

Govern HELP 5.x - STANDARD Directory Structure: (Same Level option)

The structure for the Standard directory is as follow. The **versionNum** directory will be a version number, i.e. 5.1, 5.2, 5.x,…

<HELP ROOT>	Level 1	Level 2	Level 3 - Directory / Content	Level 4 - Directory / Content
	versionNum (dir) *Ex. 5.1, 6.0, etc.*	**Applications** (dir)	**MSGNET** (dir)	*.pdf Help* and required supplemental files. i.e. avi, docx, jpg, etc.
			GNA (dir)	*.pdf Help* and required supplemental files. i.e. avi, docx, jpg, etc.
			QT (dir)	*.pdf Help* and required supplemental files. i.e. avi, docx, jpg, etc.
			. . .	
		Entities (dir)	**entityName01** (dir)	.pdf Help files
			entityName02 (dir)	.pdf Help files
			. . .	
		Forms (dir)	**formName01** (dir)	.pdf Help files
			formName02 (dir)	.pdf Help files
			. . .	
		Profiles (dir)	**profileName01** (dir)	
			reportName02 (dir)	
			. . .	
		Reports (dir)		
			reportName01.rpt (dir)	*.pdf Help* and required supplemental files. i.e. avi, docx, jpg, etc.
			reportName02.rpt (dir)	*.pdf Help* and required supplemental files. i.e. avi, docx, jpg, etc.
			. . .	

Govern HELP 5.x - CUSTOM Directory Structure: (Same Level option)

The structure for the *Custom* directory is nearly identical to that of the *Standard* directory. The exception is that the *Version* directory is not present at *Level 1*. All sub-directories are shifted up by one level.

<HELP>	Level 1	Level 2	Level 3 - Directory / Content	Level 4 - Directory / Content
	Applications (dir)	**MSGNET** (dir)	*.pdf Help* and required supplemental files. i.e. avi, docx, jpg, etc.	
		GNA (dir)	*.pdf Help* and required supplemental files. i.e. avi, docx, jpg, etc.	
		QT (dir)	*.pdf Help* and required supplemental files. i.e. avi, docx, jpg, etc.	
		. . .		
	Entities (dir)	**entityName01** (dir)	.pdf Help files	
		entityName02 (dir)	.pdf Help files	
		. . .		
	Forms (dir)	**formName01** (dir)	.pdf Help files	
		formName02 (dir)	.pdf Help files	
		. . .		
	Profiles (dir)	**profileName01** (dir)	.pdf Help files	
		profileName02 (dir)	.pdf Help files	
		. . .		
	Reports (dir)			
		reportName01.rpt (dir)	*.pdf Help* and required supplemental files. i.e. avi, docx, jpg, etc.	
		reportName02.rpt (dir)	*.pdf Help* and required supplemental files. i.e. avi, docx, jpg, etc.	
		. . .		

Govern HELP 5.x - CUSTOM Directory Structure: (Profile option)

<HELP>	Level 1	Level 2	Level 3	Level 4	Level 5
CUSTOM	Applications (dir) MSGNET (dir)	**Profiles** (dir) **profileName01** (dir)	Forms (dir) formName01 (dir)	Entities (dir) entityName01 (dir)	Reports (dir) reportName01.rpt (dir) **reportName01.rpt**
		Profiles (dir) **profileName02** (dir)	Forms (dir) formName01 (dir)	Entities (dir) entityName01 (dir)	Reports (dir) reportName01.rpt (dir) **reportName01.rpt**

In the above example, different profiles will require the same report. When the **Profile** option is selected in the *System Registry*, the different profiles will be using the same report. Copies of the same report are placed in the different *Profile* directory.

Custom Directories

Note: The structure of default **Standard**, and **Custom** folders **should not** be modified.

Users are not required to create directories for the **Custom** *Help* folder; the structure established during installation must be kept in order for the content to be available.

Note: Unless additional files are required, the help content are in **PDF** format. Any additional formats that are mentioned above are files that are **supplemental** to the PDF with the main help content.

Note: When including any supplemental content, users must ensure that the file format is supported by the end-users system; e.g. if a MicroSoft Office PowerPoint document is to be one of the supplemental files, a PowerPoint viewer or a fully licensed version must be installed on the installation computer.

Creating and Using Custom Help Files

For a user to open the Help file within the Govern application, they will need to select the **Help** tab in the ribbon of the *Govern* application (**A**). Under the ribbon, the help content which corresponds to the **Application**, the **Profile**, the displayed **Open Form**, and the **Entity** is displayed (**B**).

- **Applications** - Content corresponding to the suite *Application*; the *General* group
- **Profile** - Help content for the *Profile*
- **Form** - The help content for the displayed *Open Form*
- **Entity** - Help content related to the *Entity*
- **Report** - This is the *Report* associated with the form or entity.

The *Help* button displays information for the main application, and the *OpenForm Help* will display Help content that is related to the active OpenForm.

Missing / Unavailable Help Content

 When content is not present the broken help link icon is displayed. This icon is an indication that there is an issue with accessing the Help file(s). Issues can be anything from the files not being present or incorrect directory structure due to a change in the *Open Forms General Settings* form in *GNA*; the **Help Folder Structure Type** parameter may have been changed.To correct this situation, users will need to either:

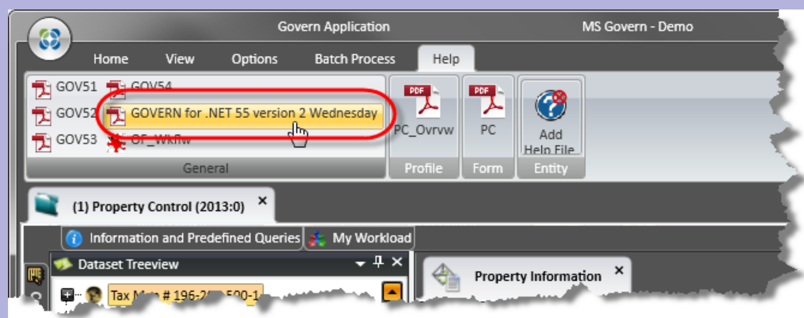
- Place the required content in the appropriate directory.

OR

- Verify that the **Help Folder Structure Type** parameter setting in the *Open Forms General Settings* form in *GNA* is set to the correct Help folder structure.

BEST PRACTICES - CUSTOM HELP CONTENT NOMENCLATURE

- Lower case names should be used.
- Users should try to limit filenames of help content to no more than 12 characters because the group will expand to accommodate the name. *See image below*



- Limit the length of directory names directories; try not to exceed 12 characters
- Use the underscore character "_" in place of spaces. Ex. parcel_asmnt
- Ensure that the extension of the file is supported by the end-user's system that the content will be viewed on.
- As a result of the brevity required for the filename, a detailed description of the *Help Content* can be entered using the **Resource File** editor in *GNA.* The node that contains this information is located in the **WD** module, **CustomHelp** function. The Keys for tool tips will be appended with an **_TT** in the names.
  Refer to the Govern New Administration (GNA) Release 5.1 user guide for details about using the Resource File editor.

Order of Precedence for Help files Directories

When a user invokes or calls the help file, the Govern system first checks in the **Custom** folder. If the requested file is not found, it will default to the **Standard** folder to display the file. The *Custom* folder is reserved for users that want to generate their own custom PDF help files.

Security for Custom Folders

Note: There is no security imposed on the Custom Help directories. This is the default setting for the installation. Administrators that wish to limit user access to these directories will have to do so using Windows security. Security settings will also need to be done on a user by user basis.

BEST PRACTICES - SECURITY

The recommended security setting for administrators that require user restriction to directories, is as follows:

- All top level Help directories should be set to **READ ONLY**. for the Custom folder.
- In order for users to be able to add or update custom content, subdirectories of the top level **Custom** folder should be made accessible, i.e. **READ / WRITE** for users. This will allow them to place help in the directories when required.

Creating Custom Help Files

The Govern application is designed to be flexible, with the understanding that users are able to design forms and reports. It is therefore expected that they may have a requirement to customize their Help files contents. When users customize Govern, supplementary help content can be created in one of two (2) ways.

- Annotate existing system Help files
- Generate new content with new PDF files

Annotating System Help Files

Users may annotate, i.e. add Notes, to existing system PDF files that correspond to the modules. Although system files should not be modified, there are steps that can be taken to ensure that system integrity is maintained.

BEST PRACTICES - ANNOTATING SYSTEM FILES

When annotating system PDF files, users should make a complete back up of the installed files. Only the copied files should be annotated and placed in the **Custom** folder. Original system files will remain in the **Standard** folder.

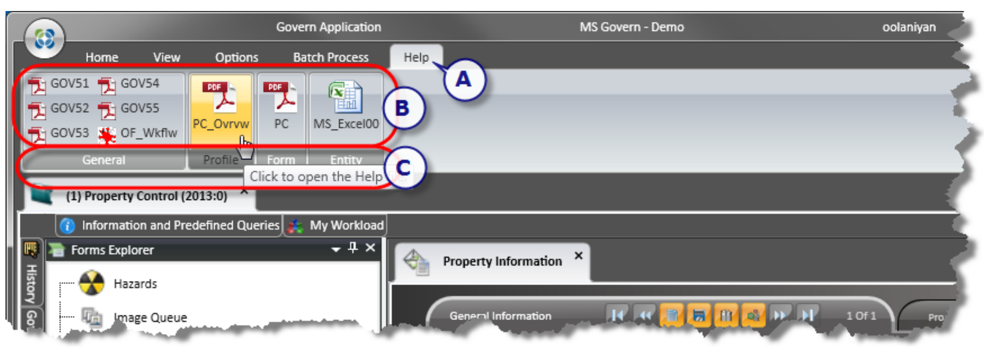
Generating PDF Help Files

When generating a PDF file with custom content, in order for the system to recognize the custom PDF file, it must have the same name as the one that is used in the Govern application or module.

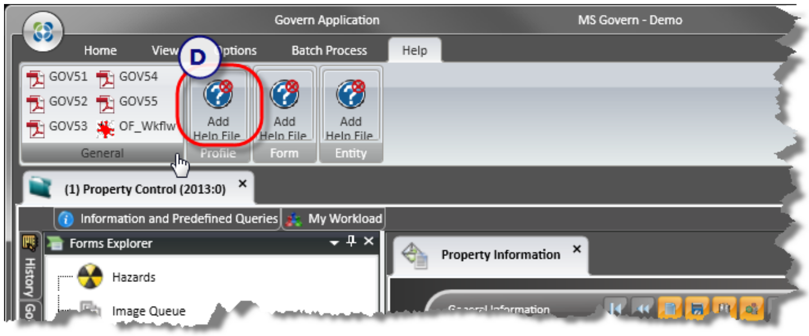
For example, the **Hazards** (**PC24**) OpenForm in the *Property Control* module has been customized. A new PDF file is made containing custom instructions. In order for it to be accessible, the new PDF file should have the same name as the system default Help file. For *Hazards* the file is **PC24.pdf**; when this file is created, it should then be placed in the appropriate subdirectory in the **Custom** folder.

Note: When a custom PDF is placed in the *Custom* folder, it is not necessary to remove the system default help file in the **Standard** folder. System files should never be modified.

Adding or Replacing Help Content



There are two zones to the Help content ribbon in Govern (**A**). Zone 1 (**B**) which contains the icon for the help content file is the area to click when you need to access the content. Zone 2 (**C**), when selected, will give access to the directory that the content is located in.



Note: In instance where there is no help content and the broken help link icon is displayed (**D**), a click on the link will also display the directory.

The directories at the custom content is to be placed in is easily accessible with a click on the icon under the *Help* tab in the *Govern* ribbon.

APPENDIX B:Govern V6 Shortcuts

Although the Govern User Interface (UI) is designed for use with a mouse, users may also benefit from keyboard shortcuts. During a day, users can save time by using keyboard shortcuts instead of the usual point and click of the mouse. The following shortcuts are for the Govern Release 6.x User Interface.

Key or Combination	Action
F1	Select the Help Ribbon
F2	Select the Home Ribbon
F3	Select the Predefined Search pane
Ctrl + F3	Select the auto-hide Saved Dataset pane
Shift + F3‘	Select the Query Tool (Only valid if the Query Tool is installed)
Ctrl + F4	When a form is selected, it will close the current active form
F5	Refresh an Open Form
F6	Go to previous record in the Tree View pane
F7	Go to the next record in the Tree View pane
Ctrl + F9	Go to the First record
Ctrl + F10	Go to the Previous record
Ctrl + F11	Go to the Next record
Ctrl + F12	Go to the Last record
Ctrl + N	Create a New record
Ctrl + S	Save a record
Alt + Del	Delete
Shift + Esc	Cancel a Save
Ctrl + Tab	Cycle Forward between open Profiles
Ctrl + Shift + Tab	Cycle Backwards between open Profiles
Ctrl + H	Display Entity Audit screen

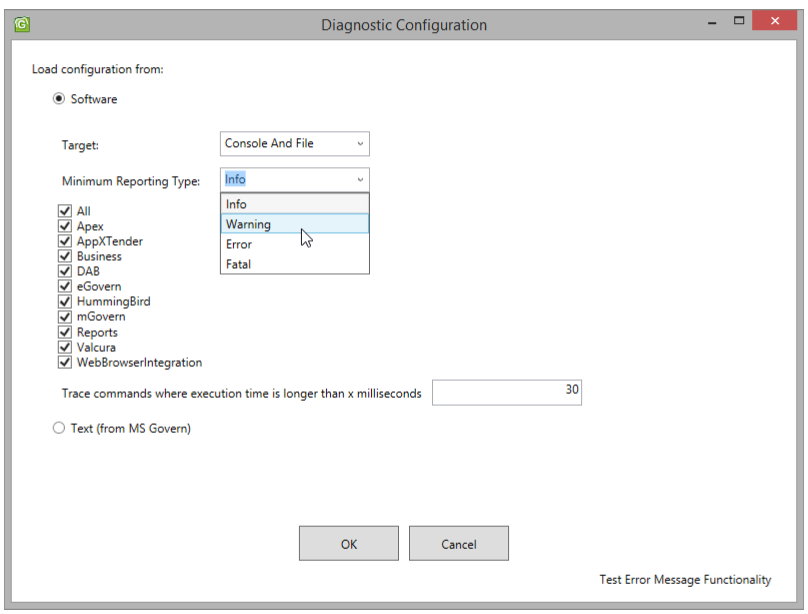
Note: For shortcuts for other application in the Govern suite refer to each applications user guide.

APPENDIX C:Diagnostic Configuration form Trace Log

Resolving Performance Issues

The functionality of the GNA trace utility has been expanded in Release 6.0. In previous releases, trace logs were generated by setting individual keys for sections that a log was required for; e.g. General, DAB, GIS, Mobile, and so on. In the current Release 6.0, all trace activities are managed through the Configuration Diagnosis console.

When there are issues with the performance of an application, or queries that are being perceived as “taking too long to complete”, resources are available to assist in determining the root cause. The *Govern Data Access Block* or **DAB** is one of the central components to *Governs* functioning. Options exist to have the **DAB** generate traces that are logged in a file. Reviewing this file can be instrumental in the resolution of system issues. These “trace logs” can be configured through the **Diagnostic Configuration** form

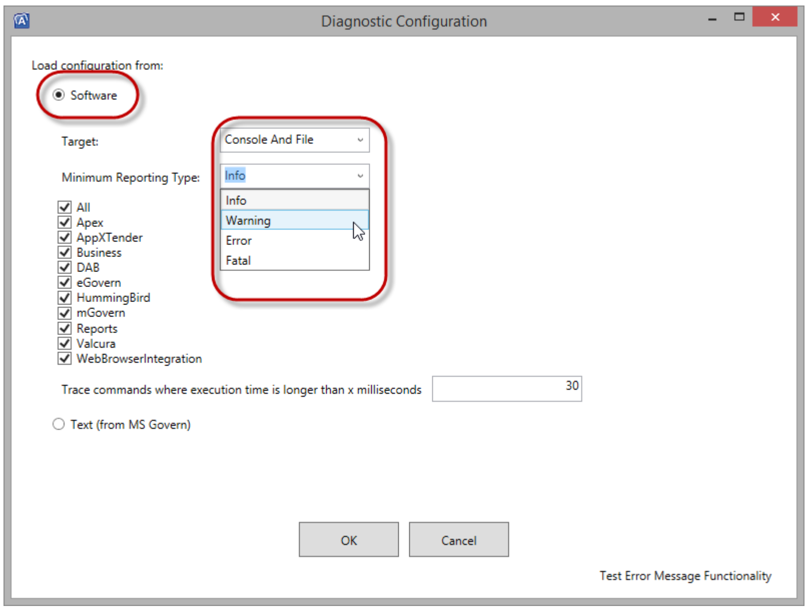


Enabling the Trace Log

In order to start the trace, the *Trace Log* feature must be enabled in the *Diagnostic Configuration* form; this form is identical to the form found in the *Govern New Administration* (**GNA**).

To access the form in the *Govern* ribbon...

1. Select *Options (tab)* > *Diagnostic group* > **Configuration**.
2. In the *Diagnostic Configuration* form, select the **Software** option.



3. Look for **"Load configuration from".** Click to select the Software radio button.

Default Trace Log Settings

By default, when enabled, a trace process will immediately begin to generate data that is written to a *Comma Separated Value* (**.csv**) log file in the Trace directory of the deployment folder. The trace file uses the following naming convention:

`userName_serverName_ckName_appName.csv`

where...

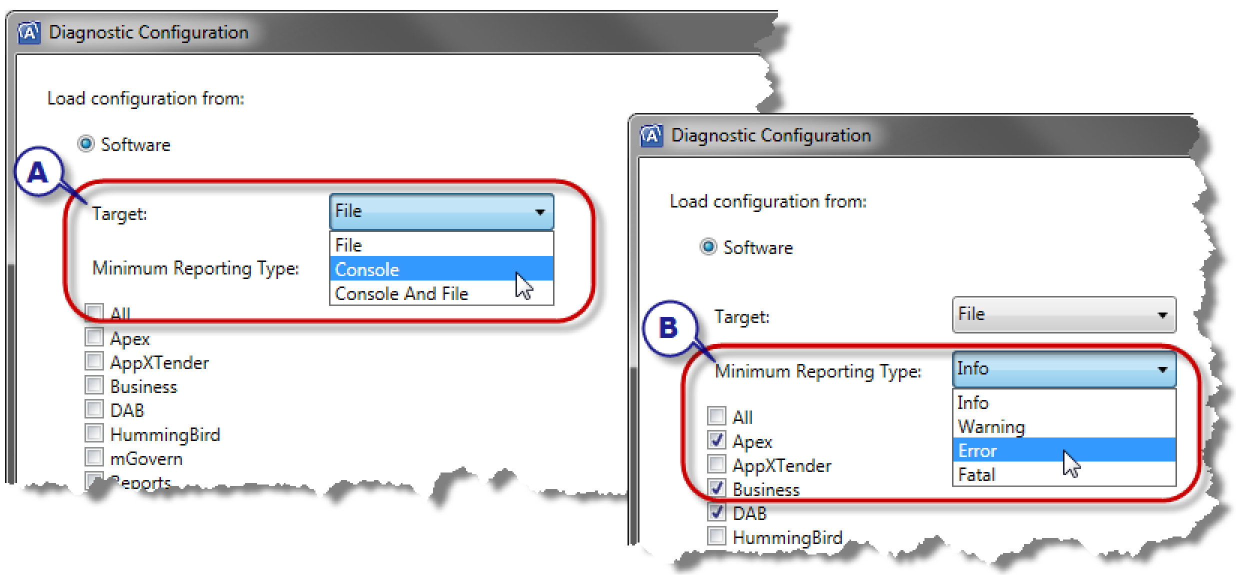
- **userName** = users login name

- **serverName** = name of the server that the application is installed
- **ckName** = the connection key name
- **appName** = the application that is being monitored

Ex.: jdoe_JNMTL2_GOVDB_60_JNMTL2_SQL_GovernNetAdmin.csv

Note: The trace file is self maintaining in that it will be deleted when it is older than 30 days. Alternatively, users may opt to delete the file manually, it will be regenerated the next time it is enabled.

Software option



Target: The Target parameter allows the selection of how the trace information will be presented. The options are as follows:

- **File** - The **File** option will generate the trace information as a log file. This .csv file can be opened with any application that supports the format, e.g. *Microsoft Excel*.
- **Console** - When **Console** is selected, a console (output window) titled **NLog** is launched. The trace information is logged in the **NLog** window.
- **Console and File** - Selecting the Console and File option will display the trace information using both of the above means, the *NLog* console window will be displayed and the **.CSV** log file will also be generated.

When the Text option is selected, A text field is displayed. The intent is that any debugging information is pasted into the field.

Minimum Reporting Type: Selecting a minimum reporting type will determine what details are logged. For example:

- **Info** - Select the Info option to log general information about the application. This can include a list of the calls that are made by the application
- **Warning** - The Warning minimum level will log error messages that are of the type Warnings.
- **Error** - When a minimum level of **Error** is selected, the system will log all errors that are categorized as an Error. These are errors that will cause the application to halt its current process, but will not cause it to fail. In this situation data loss may occur.
- **Fatal** - This option will log all errors that are categorized as Fatal. These are errors that will cause the application to fail, i.e. a crash without the chance of a recovery. In this situation data loss may occur.

Supported Modules

The list of supported modules pertain to the areas of the govern application, modules, and integrated 3rd party modules.

- **All** - Selecting All will log the errors generated by all modules. This will include traces of the errors generated by installed Govern suite applications; e.g. *MSGovern, GovernNetAdmin, BEDesigner, GovernSoftware.Security.UI.Manager, MSGovern.OFD*, and so on.
- **Apex** - This option will log activities related to the Apex drawing software.
- **AppXTender** - Select this option to log errors related to the AppXTender document management solution
- **Business**
- **DAB** - Selecting the DAB option will log the activities that access the *Govern Data Access Block* (**DAB**)

Note: When the DAB option is selected, a new field called **Trace commands where execution time is longer than X milliseconds** will be displayed. *See details below.*

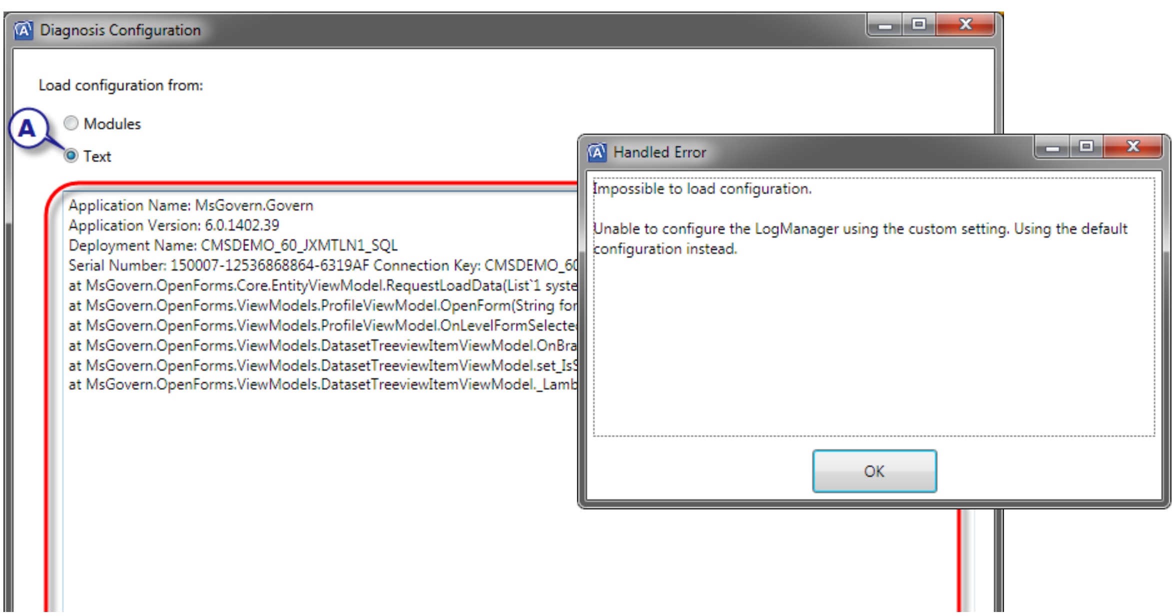
  - **Trace commands where execution time is longer than X milliseconds** - Enter a value in milliseconds that will be used a threshold. Any actions or calls that take longer than this value will be recorded in the log file. The default value for this field is **30** milliseconds

Tracing Govern Applications

- **eGovern** - Issues with the eGovern can be traced with this option.
- **HummingBird** - Use this option to obtain a trace log for Hummingbird Document Management System integrations.
- **mGovern** - Selecting this option will provide trace information that is related to the mGovern mobile application
- **Reports** - When there are issues with reports, select this option to trace information related to reports.
- **Valcura** - Use this option to obtain log information related to the Valcura appraisal system integration.
- **Web Browser Integration** - Select this option to log errors generated by Web browser related integrations, i.e. integrations that make calls to the Web.

Text (from Govern) option

The text option is reserved for entering debugging information that is generated by the system. When errors are generated by the system, the debug code can be copied and reviewed for insight into the issue. To further assist, when the "*Load configuration from*" **Text** option (**A**) is selected, the debug code can be copied and pasted into the text field that is displayed.



If there is an incompatibility, an error window will be displayed.

Enable Application Tracing For DAB

Select this option to enable the DAB trace option.
(Key: **DABTracingIsEnabled**)

Enable Application Tracing For External Documents

Select this option to enable the DAB trace option.
(Key: **ExternalDocumentTracingIsEnabled**)

Enable Application Tracing For GIS

When selected, this option will enable the GIS trace.
(Key: **GISTracingIsEnabled**)

Trace commands where execution time is longer than X milliseconds

This condition option will log both failed commands as well as those that exceed 'X' number of *milliseconds* to execute. (Key: **DAB_CommandsMaxInterval**)

Note: When this option is selected, a log entry will be made regardless of whether the command was successful or not. The trigger for this option is the fact that the execution of the command exceeded the set time. This option requires that the **DataAccessBlock**, **Enable Trace** commands option is enabled.

Note: Parameter units are in *Milliseconds* (i.e. 1000 milliseconds = 1 second); if you want a delay of 3 seconds, enter a value of **3000**. The default System value is set **30 milliseconds**.

Accessing the Trace Log

After the *DAB Trace Log* has been enabled in the *System Registry*, the log file for the *Govern* application can be displayed through the *Govern Ribbon*. In the Govern Ribbon, the log file can be accessed with a click on the **Show Trace** button.

Format of DAB Trace Log File

The log file is formatted as a *Comma Separated Values* (**.csv**) file. If you have Microsoft Excel installed, the file will by default, be opened by *MS Excel*. The log file is located in the **Trace** folder of the *DeployEZ* deployment. The file name is formatted as follows:

```
[UserName]_[MachineName]_[ConnectionKey]_[GovernApplication-Name]_VersionNumber.csv
```

For example: A log file is generated by the *Govern* application for a user called **pparker**. The users computer is called **octavius8**, and a connection key name of **OCTAVIUS8_MYDB_SQL**was used. The name of the trace file will be as follows:

ppparker_OCTAVIUS8_OCTAVIUS8_MYDB_SQL_GovernContainer_5.1.1234.csv

When the file is opened in a spreadsheet application, the log file parameters will be listed under the following headings:

- Trace Date
- Level
- Class Name
- Method Name
- Execution Time
- Message

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