MSGovern

Property Control

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Harris Govern

Property Control

Govern™

Version: 1.0

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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.

Preface

Welcome to Govern, a comprehensive and fully integrated transaction driven system written exclusively for local governments. Govern includes a wide variety of database modules:

Computer-Assisted Mass Appraisal (CAMA)

- Appraisals / Property Valuations
- Comparables Sales Management

Financial Management

- Account Receivable
- Cash Collection

Land Management

- & Individual Licenses
- Complaint Tracking
- Leasing
- Permit Tracking & Inspection Scheduling
- Planning
- Violations

Revenue Management

- Aircraft & Boat Excise Tax
- Miscellaneous Billing
- Personal Property Tax Billing
- Real Property Tax Billing
- Self-Reported Tax Billing
- Special Assessments
- Tax Title / Tax Lien / Tax Sales
- Utility Billing

Since 1980, *MS Govern* has worked hand-in-hand with State and Local Governments to simplify the implementation of software solutions that automate the flow of information related to their properties.

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Introduction: Property Control

Overview

Govern's Property Control Profile creates and maintains attribute data that may not be otherwise maintained by the integrated applications in the *Govern* suite. It also merges and extracts data from various sources to continuously improve and refine the quality of the available data.

The *Property Control* database is the repository of textual or descriptive data required by the spatial database. In this manner, the data is stored only once in the system. With the *Govern Security Manager* (**GSM**), access rights can be configured on a department basis. In essence, each department views the information as it is related to them. In addition, if required, individual users can also be restricted in their access to individual fields in an *OpenForm*.

For example, the Planning Department can see new properties while the Tax Receiver's Department will only see properties relevant to their fiscal year. Departments can share all information. Alert messages can be attached to a property which can be viewed by all, or restricted to the originating department. Hazards, constraints and restrictions can be made available to all departments. All parcel genealogy history is kept in the system so that at any time, Users can view the origin of the property, as well as all the data associated with it. In addition to *GIS* integration with applications like *Govern's GIS View*, full imaging capabilities are available.

What's New

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

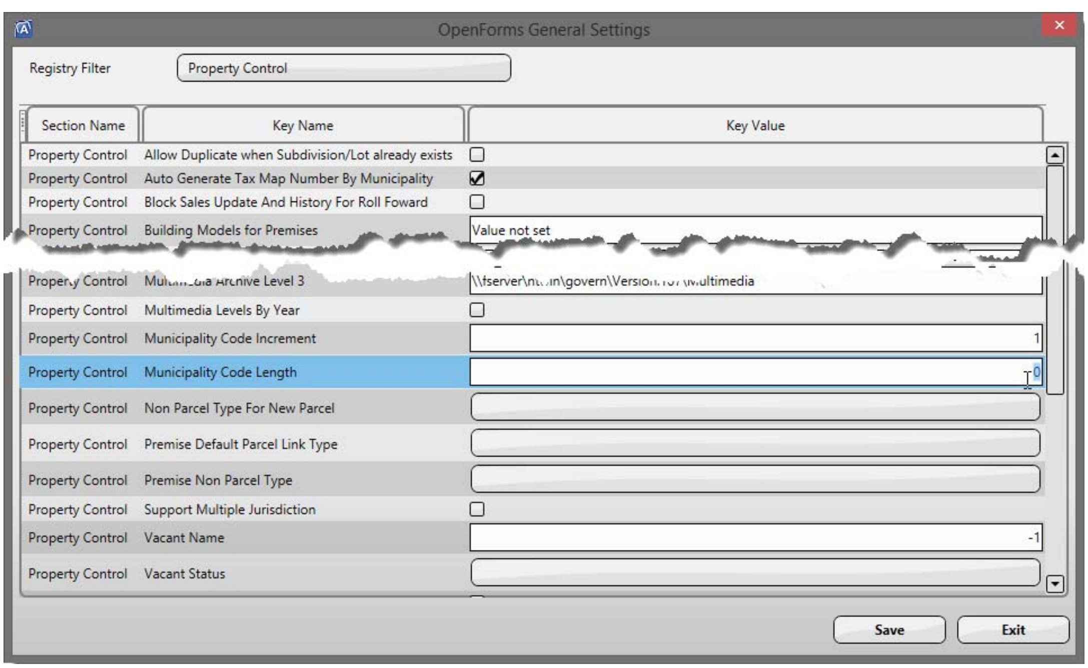
Property Control Administration

Overview

Administrative setup of the forms and parameters for *Property Control* are completed and defined in the Govern New Administration (GNA) application. As a result of the fact that Property Control setting are made through the *Govern New Administration* (**GNA**), they are system wide for the *Property Control* profile. Below is a description of additional administrative settings for the *Property Control* profile in *Govern*. In *GNA* these settings can be found under the **System Parameter** tab in the *General Settings Editor* form.

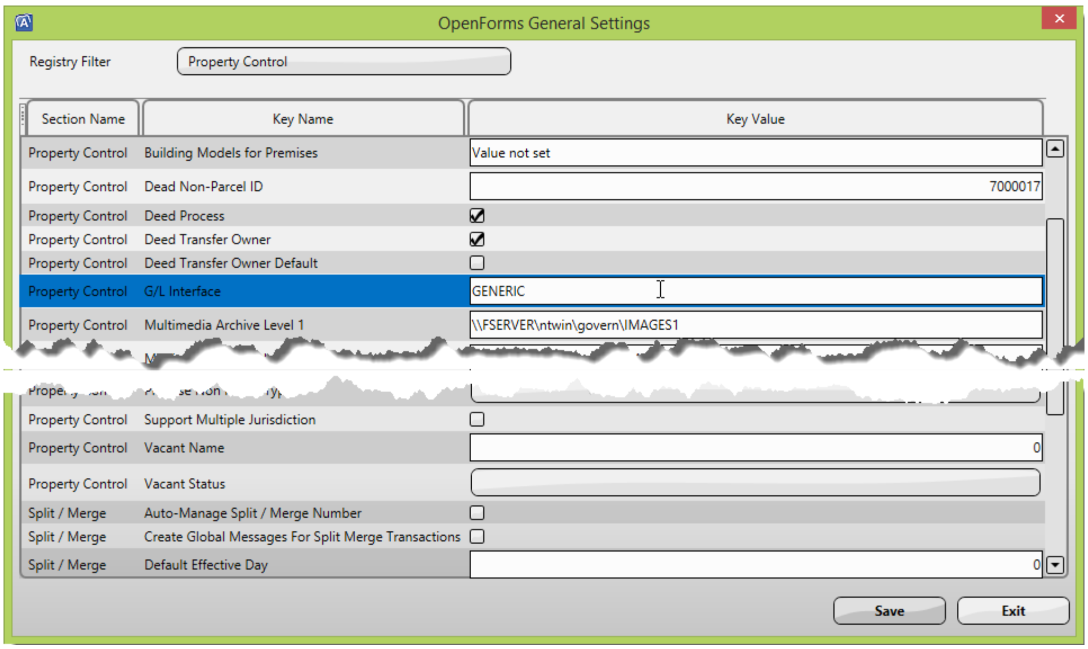
To access *Property Control* settings, open *GNA*...

1. Select *System Parameters (tab)* > **General Setting Editor...**
2. In the *OpenForms General Settings* form, beside the *Registry Filter*, select *Property Control* from the drop down menu.
3. With *Property Control* selected, you are presented with a grid that contains the configuration parameters related to *Property Control*.



OpenForms General Settings - Admin System Registry tab

Property Control Profile Parameters



The following are the common Property Control parameters located in the GNA. Note that some of the parameters will need to be configured in order for them to appear.

Allow Duplicate when Subdivision/Lot already exists: A subdivision number can be used without entering a lot number when the **Allow Duplicate when Subdivision/Lot already exists** option is selected. Previously, it was required to enter at least one *Tax Map Number, a Subdivision/Lot Number,* or an *Alternate Parcel ID* to create any *New* or *Virtual Parcel*.

Auto Generate Tax Map Number by Municipality: This feature allows the auto-generation of a tax map number by municipality while creating new properties in *Property Information*. The system will get the next available tax map number by incrementing the returned tax map number with the given municipality code from the **PC_PARCEL** table.

NEW! Block Sales and History for Roll Forward: When this option is selected XXXXXXXXXX

Building Models for Premises: In the Building Model for Premises parameter, specify the codes for the building models to be used for the Business Assessment premise.

Note: Multiple codes are separated with a semicolon, i.e.
CODE01;CODE02;CODE03
No spaces are to be used.between each code.

NEW! Block Sales and History for Roll Forward: When this option is selected XXXXXXXXXX

NEW! Deed Process: When this option is selected XXXXXXXXXX

NEW! Dead Non-Parcel ID: When this option is selected XXXXXXXXXX

NEW! Deed Transfer Owner: When this option is selected XXXXXXXXXX

NEW! Deed Transfer Owner Default: When this option is selected XXXXXXXXXX

G/L Interface: Specify the template for a G/L interface that will be used for exporting any G/L data; GENERIC is used for the Govern Generic G/L interface.

Multimedia Archive Level 1: When selected, this path will contain all the multimedia documents. The system creates a new directory in this path each time you save a multimedia document. The directory name is the date you have saved a document, for example, 20140530: May 30th 2014. All the documents you save during the course of a day will be saved in the same directory.

Multimedia Archive Level 2: This path will contain all the archived multimedia documents from Level 1 after running the Archive Multimedia Batch Process.

Multimedia Archive Level 3: This path will contain all the archived multimedia documents from Level II after running the Archive Multimedia Batch Process.

> **Note:** If you manually modify the multimedia paths for the three levels, the IMAGING section of (Table: SY_REGISTRY) is automatically updated. The batch process will use these paths, in the Imaging section to archive the multimedia documents.
>
> In addition, if you change the path (for the Levels 1, 2 or 3) after saving multimedia documents, you will not be able to display these images.

Multimedia Levels by Year: Select this option to create an additional folder for archiving your multimedia images. A directory named according to the current year will be added to the end of the multimedia image paths at each level.

Municipality Code Increment: Specify the increment of the municipality code number generated when parcels are automatically created.

Municipality Code Length: This parameter is used to specify the length of a municipality code when the tax map numbers for newly created parcels are automatically generated.

Non Parcel Type for New Parcel: When new parcels are created in the Split/Merge/Remap or Property Information function, they can be created as non parcels until they are verified. This option allows the users to specify a Non-Parcel Type when the new parcel is created.

Premise Default Parcel Link Type: The *Premise Default Parcel Link Type* option allows the user to specify the *Parcel Link Type* that is used as a default when links are created to a *Premise*.

Premise Non Parcel Type: In the drop down menu, select the type of *Premise* that will be designated as a *Non-Parcel Type*.

Multiple Jurisdictions

A Jurisdiction is a defined area that a user has power or authority to apply the law. Jurisdictions are created in the user validation table, VT_ USR_JURISD. When a municipality has multiple jurisdictions, select this option to be able to configure the parameters that are available in Govern.

Support Multiple Jurisdiction: Select this option to maintain data by Jurisdiction.

Vacant Name: In this parameter, enter the Vacant Name ID. *See Business / Occupant and "Vacant" Premises on page 112 for details about the "Vacant" status.*

Vacant Status: Specify the status that will determine the records that are affected by the Vacant processing.

Auto-Manage Split/Merge Number: By default, this option is selected. When selected, the system will manage the generation of the SMR numbers. The schema used for number generation is the system determines that last maximum number of the year and increments it by 1. If the option is disabled, the user will be able to override the system generated number.

Note: When this option is disabled, extreme caution should be used by all users that are entering numbers to avoid duplicates.

Global Messaging

Global messages and the Govern Global Messaging feature are used to warn users that a property is part of an un-finalized split merge transaction. The message (i.e. **Warning, this property is part of an un-finalized split merge transaction**) is added in a Global message so that all departments and all users can see it. After the transaction is finalized, it will be removed.

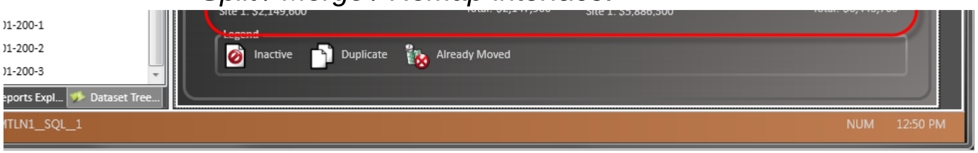
Note: If the message is changed in any way by the users, the system will not be able to remove it when the transaction is finalized.

Create Global Messages For Split Merge Transactions: When selected, Global Messages will be created for the Split Merge Transaction.

Default Effective Day: Specify a day in the **DD** format that will function as the default *Effective Date* for *SMR* transactions; a date may also be selected from the calendar with a click on the Calendar button. This option might be used by users that have a specific date that is designated for all of their *SMR* processes.

Default Effective Month: Specify a month in the MM format that will function as the default *Effective Month* for *SMR* transactions. This option is for users that have a specific month that is designated for all of their *SMR* processes.

Display and Summarize Site Info: Select this option to display the site info after the *Split / Merge / Remap* (**SMR**) process. The summary value is displayed after each total at the bottom of the **From** and **To** panes (**A**) in the *Split / Merge / Remap* interface.



Multi-Year Split Merge Remap Transactions

Organizations that have Split/Merge/Remap (**SMR**) transactions that exceed the traditional one year, are sometimes described as having *Open Tax Rolls*. In such instances completion of an SMR process is dependent upon other internal departments or external services. To accommodate multiple year processes, there is a *Multi-Year SMR* process that will allow transactions to span over two (2) years.

Users should note that this option is NOT supported in the *Property Control API WEB Services* for split merges. The split merge will be recorded in the parcel genealogy for year 1, but both years will be balanced and set.

Multi Year Transaction: Select this option to enable the Multi Year, i.e. Transaction over 2 years SMR process.

Split / Merge Keep Parcel Active: Select this option to keep all parcels active for the Split/Merge/Remap process as a default. See Keep Parcel Active option on page 154

Split / Merge Parcels are Virtual: A Virtual Parcel designation is one that is used when a Split/Merge/Remap (SMR) process is used on a parcel containing a condominium. Here, one physical parcel is split into multiple Virtual units.Select this option to set as a default.

Split / Merge Keep Parcel Active: Select this option to keep all parcels active for the Split/Merge/Remap process as a default. See *Keep Parcel Active option on page 153*

Business Assessment and Building Structural Elements (BSE)

Building Structural Elements or **BSE**’s are items that are factored into the assessment process of a property. BSE’s are items such as types of windows, balconies, doors, access points, etc. that factor into the value of a structure. One of the design features of the *Business Assessment* function is that *Building Structural Elements* (**BSE**) related to Business Assessment premises are handled separately from the *BSE*'s for other *Mass Appraisal* functions. As a result, it is necessary to specify which *Building Models* are to be used for the Business Assessment Premises.

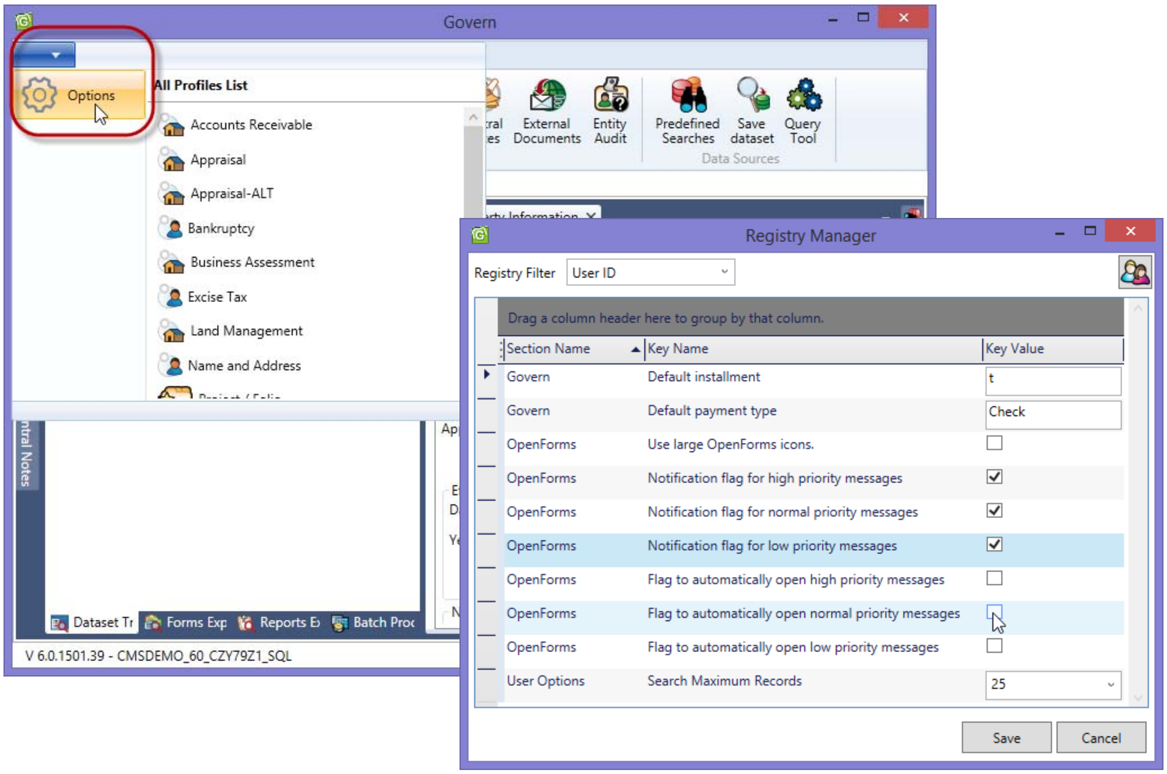
OpenForms User Settings - Registry Manager

The Registry Manager form allows users to make modifications to the interface. Unlike the global, i.e. affecting all users, *System Registry* settings that are made through the *Govern New Administration* (**GNA**), these settings are localized to individual users.

User interface modifications that are controlled in this form are the following:

- Tab positions of *Profiles*
- *OpenForms* tab positions
- Display of Govern ID panels
- Alternate option to display large icons in tabs

Registry Manager Parameters



Show tab item on left for Profile: Select this option to change the position of the Profile tab from the default top to the left hand side of the interface.

Show tab item on left for Form: As with the Profile tab above, this option will display the Form tabs on the left hand

Note: The two above options are useful for users that prefer additional vertical space for their forms.

Show Govern IDs Panel: When this option is selected, an auto-hide pane is presented on the left hand side of the interface. This pane contains a list of all Govern IDs that are in the current parcel.

Note: This feature is strictly informational; no changes can be effected to data through this panel.

Use large OpenForm icons: Select this option to display large OpenForm icons; this is feature is useful for users that have difficulties viewing tab icons in their default size.

To access this form, in the *Govern* user interface...

1. Click below the Govern Suite icon in the upper left hand corner of the interface (**A**).
2. In the menu, click to select **Options**.
3. The *Registry Manager* form is displayed; select any required options with click in the corresponding check box.
4. Click **Save** to confirm your options, or click *Cancel* to exit without saving any changes.

All of the above user interface settings are restricted to individual users.

Property Control in Govern

Overview

Following is a brief description of the *Property Control OpenForms* that are available to the Govern user.

Property Control OpenForms

Hazards

The *Hazards OpenForm* is used for setting up and maintaining property records with dangerous or variable land conditions, including hazardous areas and conditions, heritage areas, floodplains, environmental factors and wildlife protected areas. *See Hazards on page 118.*

Hazards: The Hazards tab is the location to create the Hazardous Material (hazmat), or hazardous conditions record, e.g. floodplains, protected areas, etc.

Linked Properties: This tab allows the linking of other properties to the current hazards record. For example, when there is a record of hazardous material storage, it may be linked to several locations. As a result, these additional properties may be linked to the record using the Linked property function

Image Queue

The *Image Queue OpenForm* is used to link a Multimedia document to a specific record. This linking process can occur after the fact and so is able to be used with document fed scanners. The Image Queue is set up in *Govern Admin*, on the *Permit System Activities* form. *See Image Queue on page 59*.

Legal Information

The *Legal Information* function is used for setting up and maintaining legal information, including lot size, property classification, property type and land use. This information is saved by year. Unlimited space is provided for adding legal description notes and comments. Like all property control forms, the

Legal Description function is linked to the GIS. When you select a parcel on the map application, the legal information is available. *See Legal Information on page 176*.

Multimedia

The *Multimedia OpenForm* is used for linking multimedia files to property, name, permit and sales records; for example, building drawings can be linked to a property record, photographs or video files to a complaint, building plans can be scanned and linked to a permit or the property deed to a sales record. PDF documents and unlimited text lines can used as annotations to the file. Each property control *OpenForm* can create and maintain customized multimedia links. *See Multimedia on page 48*.

Parcel Linking

The Parcel Linking OpenForm is used for linking a group of parcels. These parcels can be assessed and assigned values based on total area rather than on a per parcel basis, if you have the *Mass Appraisal* module. You can use this function, for example, for maintaining data on a condominium complex. Define the complex as the master parcel and link each unit to it. Enter a percentage for each unit; then, use the Appraisal Linking option to calculate the values. Alternately, you can enter a value and a percentage for each unit and use this option to calculate the value of the master parcel. *See Parcel Linking on page 184*.

Parcel Link Summary: *Parcel Link Summary* is used for summarizing the information on an active parcel. Information includes *Link Type*, *Link start* and *stop*, and durations. An *Appraisal Link* option to provide *Appraisal* values is also available when the *Mass Appraisal* module is installed.

Linked Parcels: Under the Linked Parcels tab are options to create new parcel link records as well as linking to a current record.

Property Area

The *Property Area* form is used for setting up and maintaining information on the area where the property is situated. This information is saved by year and you can create as many records as needed each year.

Note: If the Property information is referenced by *Govern's Mass Appraisal* module, it MUST be stored in the first record.

All geographic information can be updated from this function, including zoning information, restrictions and school, city and fire districts. You can define identification area codes, neighborhoods and sub-neighborhoods for appraisal purposes and inspection territories for the automatic inspection scheduling option in the Permits & Inspections sub-system. *See Property Area on page 180*.

Property Information

General Information: The *General Information* form is used for recording and maintaining the basic reference information for each parcel. This can include details such as tax map number, subdivision, lot number, and jurisdiction. *See General information tab on page 124*.

Property Location: The *Property Location Maintenance* form is used for entering the address of each parcel. You can create as many property location records as needed for a parcel; for example, you can maintain two records for a property on a corner lot. *See Legal Information on page 176*.

Buildings: The *Buildings* information form is used for adding new building records to the current property. New building identification numbers and record sequence numbers are automatically generated. *See Buildings on page 125*.

Names: The Names tab is used to specify the owners of the property. When there are multiple owners, their percentage of ownership can be specified. *See Names on page 91*

Multimedia: The multimedia function in the Property Information profile permits users to include any multimedia document types with the parcel. This can include land surveys, blueprints, etc. *Refer to Multimedia on page 48 for details.*

Split / Merge / Remap: The *Split / Merge / Remap* function is used for modifying property records when you need to remap or change the Tax Map Number, split or divide a parcel into two or more smaller parcels, merge or combine two or more parcels together. Buildings, Multimedia, Personal Property accounts, etc., can be reassigned from the split or merged parcel to the new ones. The original parcel is assigned the Frozen ID number –32766. *See Property Information - Split / Merge / Remap tab on page 143*.

Parcel Genealogy: The Parcel Genealogy / HIstory function is used for maintaining data on properties that have been split or merged. This function displays the original parcel at the top level and the split and merged properties at a secondary level. Unlimited historical data can be saved and maintained. Each level is color-coded to indicate the parent and child parcels. You can easily make any parcel in the list active; then, view and modify the information directly from the applicable functions. *See Parcel Genealogy on page 177.*

Workflow

A workflow can be described as the combined steps of any work process, from printing bills to completing end-of-year procedures. It can include batch processes, administrative procedures and reports. They can be added to a queue in the order they need to be completed and users that need access permissions can be defined.

Workflow

General: The Workflow OpenForm is used for tracking workflows by property. You can define customized types and initiate a list of activities for each type. Activities can be set up to generate messages to other departments, inspection requests, etc. *See Workflow - General tab on page 192.*

Activities: The System Activities forms are used for creating Activities that can be selected by the department when defining permit, offense and workflow processes. *See Workflow - Activities tab on page 195*.

Linked Names: The Linked Names tab allows the viewing of names that are linked to the activities within the workflow. *See Workflow - Linked Names tab on page 201.*

Links

Under the Links tab are the various tabs required to establish the links to the current record. This can include Linked Parcels, Departments, Buildings, Permits/Offences/Workflows, Inspections, Hearings, any Linked UB/ST Accounts, or Project Folios.

Conditions / Events

The *Conditions,* and *Events* tabs, allow users to keep track of events that occur in a Workflow. Unlike *Activities*, there is no validation, and as a result the events being tracked are not linked, i.e. they can occur independent of each other, without a planned sequence. *Conditions* and *Events* are configured in *Govern Admin*, and are displayed in the *Workflow* form.

> **Note:** The admin component of the Conditions and Events feature requires the creation of Divisions, Conditions, Categories, and Status codes. Setup codes are stored in the following tables (Table: PM_CONDITIONS_CODES, PM_EVENT_CODES).

Multimedia

The *Multimedia OpenForm* is used for linking multimedia files to property, name, permit and sales records; for example, building drawings can be linked to a property record, photographs or video files to a complaint, building plans can be scanned and linked to a permit or the property deed to a sales record. PDF documents and unlimited text lines can used as annotations to the file. Each property control *OpenForm* can create and maintain customized multimedia links. *See Multimedia on page 48*.

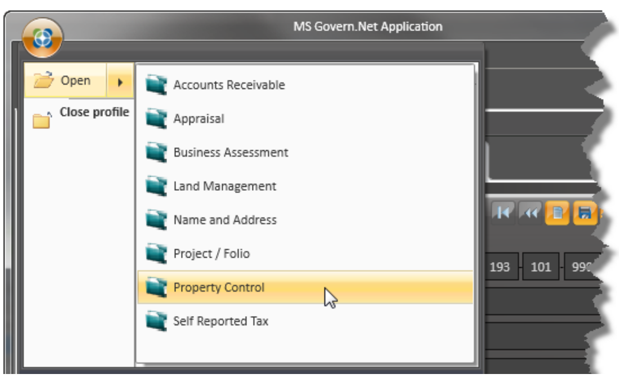
Property Control Searches

The *Property Control* predefined search forms are used for searching for existing property records. After performing the search you can define how you want the resulting records ordered; i.e. by name, tax map number, property location, etc. *See Property Control Search on page 44*.

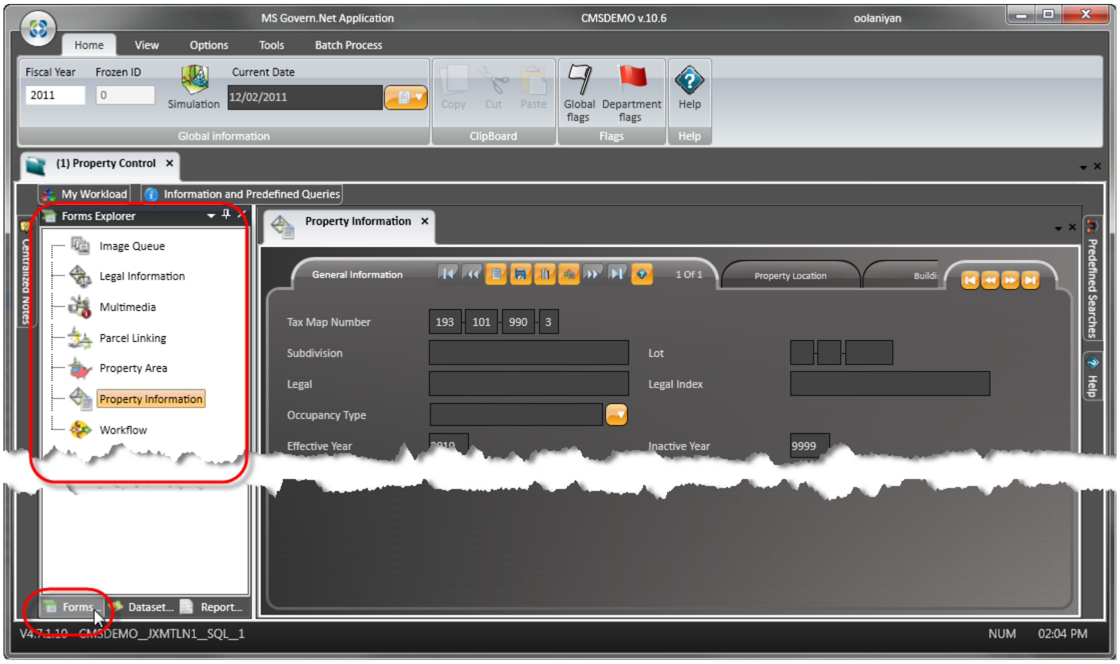
Accessing Property Control

To access any of the *OpenForms*, open a profile and select a form. Select a property record and...

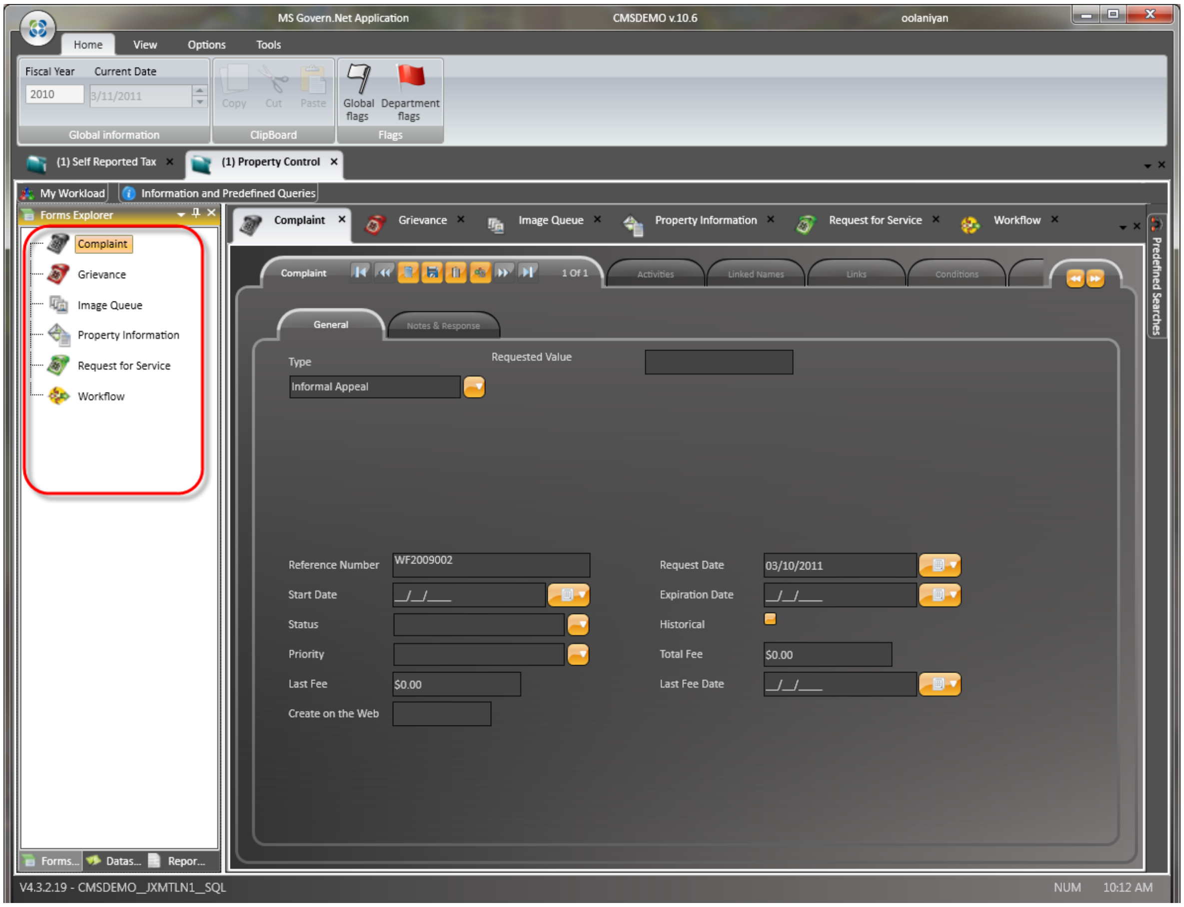
1. In *Govern*, click on the *Govern* suite button and select *Open* > **Property Control**..



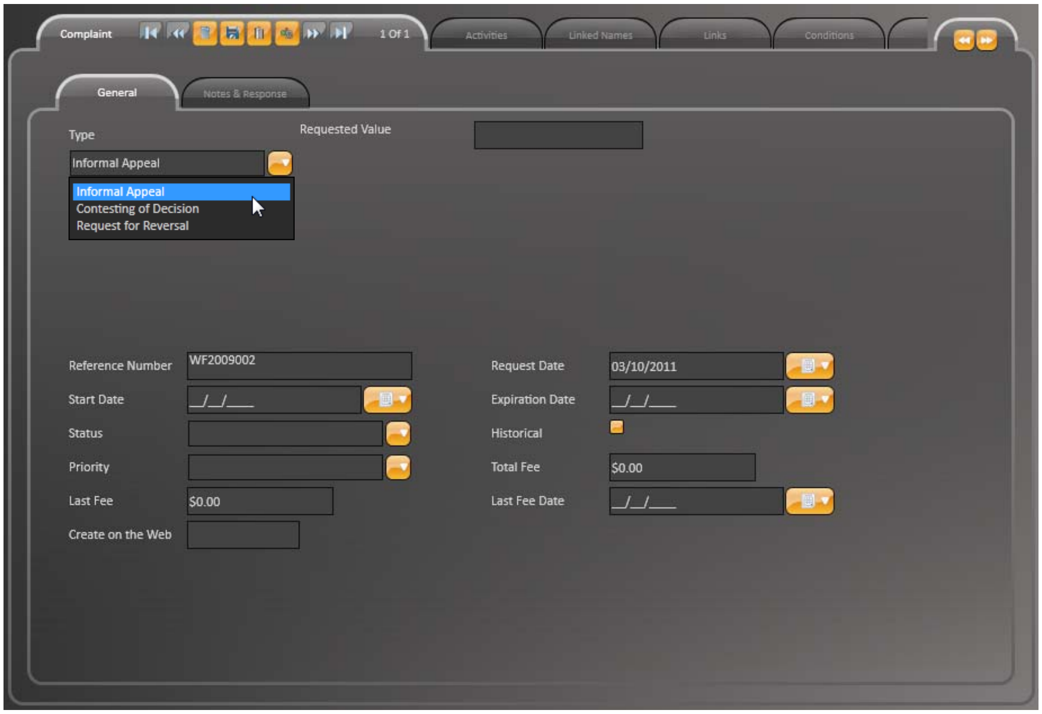
2. Click the *Forms Explorer* tab to display the *OpenForms* that are in the **Property Control** profile.



3. When the **Forms Explorer** is displayed, double click on the required *OpenForm*.



The drop-down menus on the *General Permits* function include an automatic search and select feature. Enter the first few characters, and the list automatically scrolls to the item.



For details on the Govern interface, refer to the Govern release 5.0 or later guide.

Common Buttons in Govern

Overview

The following command buttons are seen in the tabs, and perform the same functions throughout Govern.

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: To create a new record, click **New**. The command buttons on the tab will display two options, **Cancel** and **Save**.

Enter your information; when you save a new record, the buttons in the tab will once again change to the standard navigation buttons.

Save: To update the database with a new record or modifications to an existing one, click **Save**. When you save modifications to a record, the status flag changes to green to indicate the record was successfully saved and the **Record Updated** message is displayed on the Govern Status Bar..

Note: If the information on the screen was NOT altered in any way, the **Save** button does not respond.

Delete: To remove a record, click **Delete**. A confirmation message is displayed. Click **Yes** to remove the record from the database. Some types of data cannot be deleted. For example, you cannot delete a name record if it is linked to a permit or to a property record. A message is displayed on the screen to indicate the error.

Browse: To open the *Browsing* screen and view a list of the records associated with the current function, click **Browse**. Highlight the applicable record and click **Select**.

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

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

Help: A click on the Help button will display an auto-hide pane containing help information about the active pane.

Search Buttons

The following buttons are found along the top of the Predefined Searches auto-hide pane:

Search: To search a group of records, such as property, permit or name records, click **Search**. The use of ***wild card*** characters is permitted.

Note: The wild card (*) is not supported in an Oracle environment.

You can then perform the following:

- **Sort by Column**: Click on a column heading to change the display order of the listed records.
- **Copy**: Highlight a record and click **Copy** to duplicate it to your Windows clipboard.
- **Next** and **Previous**: To view the next set of records on the *Browsing* screen, click **Next**, or click **Previous** to return to the previous set. These buttons are present according to the number of records and the administrative setup.

-  **Print**: Click the printer icon to open the *Print* dialog box and select a printer for the record list.
-  **Export to Excel**: Use the Export to Excel feature to save your current search result as an *Excel* spreadsheet. The exported spreadsheet can be used for later treatment of the resulting data.

Note: In order for this option to run succesfully, a licensed version of the Microsoft Excel application, stand-alone, or as part of the Microsoft Office suite must be installed on your system.

From External: To import data from the external record set, click the **From External** search option. The records saved in the PC_ EXTERNAL table will be loaded to the form.

 **Exit:** Click **Exit** to close the current form. A confirmation message is displayed if there are any unsaved modifications. Click **Yes** to save your modifications. Click **No** to close the form without saving the new information or **Cancel** to return to the current form.

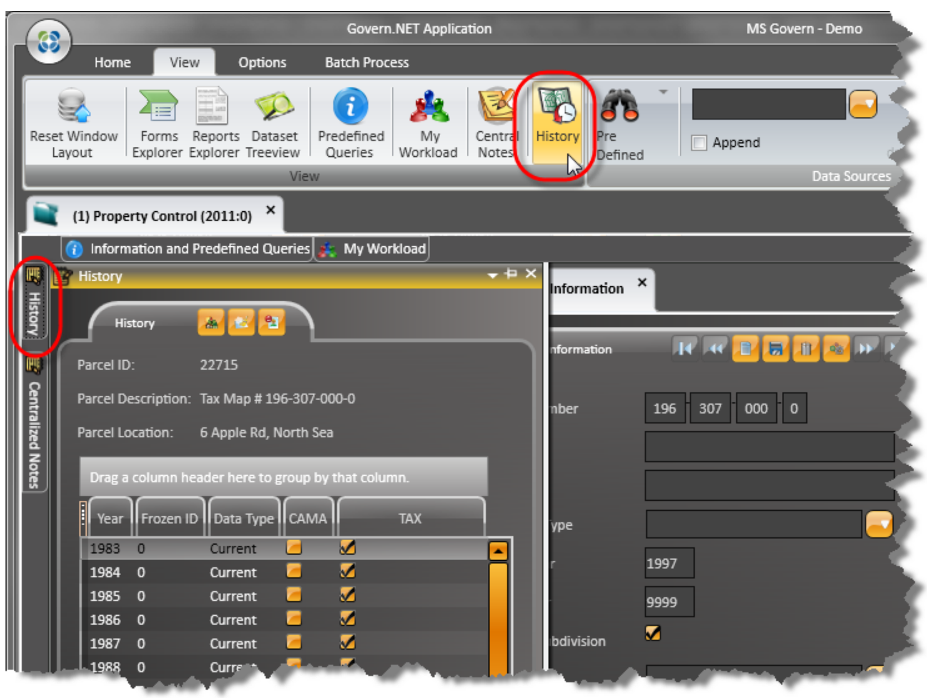
Spell Checking

The option for spell checking is incorporated in the *Govern* application. This feature must be enabled by an administrator in the *Model Designer* (**MoD**) application. When the spell checking option is enabled, Microsoft® Office’s spell checker is activated when you click **Save** or hit the **Enter** key. This option can be toggled on or off through the *MoD*, as required. *Refer to the Model Designer guide for details.*

History Pane

Overview

The *History* panel allows for quick navigation of historical data records that are associated with the currently selected record. Historical data allows you to view data from previous years, however, you cannot modify or delete the data. For *Property Control*, this can include *Split/Merge/Remap* data, as well as *CAMA* and *Tax* data. This panel can be displayed with a click on its icon on the *Govern Application Ribbon*.



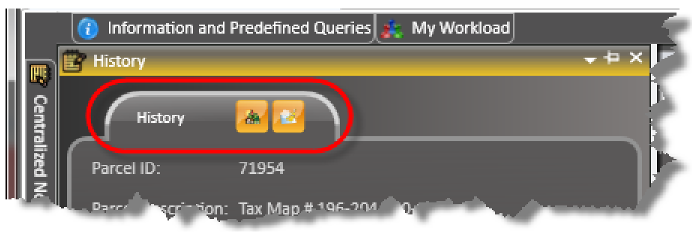
Alternatively, as an auto-hide pane, this pane is displayed by placing the mouse pointer over the tab on the left hand side (LHS) of the interface. In this auto-hide pane users will see the following:

- **Parcel ID (P_ID)** – A numerical value.
- **Parcel Description** – A Description of the parcel, e.g. Tax Map number.
- **Parcel Location** – An address.

Below the above is a data grid displaying columns containing information from (Table: **MA_MASTER**), and (Table: **TX_RE_ASSESSMENT**).

Note: Users will have access based upon the alternate **ALT** security settings that have been established for viewing alternate data in the **GSM** rel. 5.0. If specific settings are required, Administrators should ensure that they are configured in the *Govern Security Manager* (**GSM**). *Refer to the **Access to Alternate or Historical Data** section of the **GSM** Release 5.0 for details about setting access rights to Historical data.*

History Pane Command Buttons



 **Set Year and Frozen ID:** Click this button to set the *Year* and *Frozen ID* to that of the record that is selected in the grid.

To set the *Year* and *Frozen ID* to the Current Record...

1. In the *History Pane* grid, click to select a record.
2. Click **Set Year and Frozen ID**.

The *Role Year* and *Frozen ID* will now be set to that of the selected record. Alternatively, a double click on the record in the *History* pane, will also set the *Year* and *Frozen ID*.

 **Reset Profile and Fiscal Year:** Click to reset the profile and the fiscal year to the default current. Use this option to quickly return back to the original state of the interface.

History Pane Parameters

The columns in the grid are as follows:

Year: The year of the historical record.

Frozen ID: The frozen ID status of the record. *Refer to the Frozen ID Data Type grid below.*

Data Type: The data type of record, e.g. Current, Audit, Sales, etc.

CAMA: Information that is taken from the (Table: **MA_MASTER**). When there is no Mass Appraisal history data, there will be no check mark in the column.

TAX: The Tax column will contain information that has been taken from the (Table: **TX_RE_ASSESSMENT**). If the system does not contain any Tax history data, there will be no check mark in the column.

Frozen ID Data Type

Frozen ID	Data Type
0	Current
-1	Original
-32 766	Split Merge
-2 or less, i.e. -3, -4, -5, etc.	Audit
1 or greater, i.e. 2, 3, 4, etc.	Sales

History Results

Applying Filters to History Records

The results displayed in the History pane can be filtered, i.e. selectively control the information that is displayed in each column. For example to filter out all other Frozen ID's and display only records with a -2 Frozen ID.

1. With your cursor, click the column heading. Beside the heading, an arrow-head will appear (**1**).
2. Click the arrowhead to display a list of all records within the column; in the case of Frozen ID's, e.g. -2, -1, 0, 1.
3. Select the Frozen ID types that you would like to display (**2**).

4. Once you have chosen items to filter for, click outside of the selection area to automatically apply the filter.

The filters will remain in place, until they have been manually altered or cleared, or the session has ended and the application is restarted.

Clearing History Record filters

Filtered data in the History pane can be cleared in the same manner that they were enabled.

To clear filters...

1. Click the column heading, beside the arrowhead used to display filter options is a filter icon.
2. Click the **(Clear Filter)** button (**2**).

Any filters set for the column will be cleared. If additional filters exist for other columns, they will remain until they are also cleared in the same manner.

Grouping by Column Headings

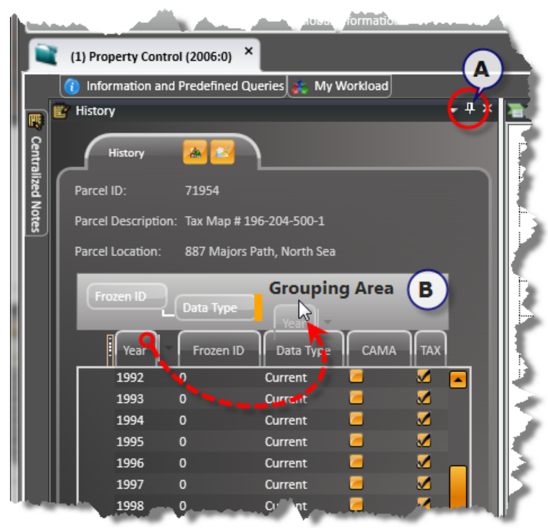
As with other specialized grids in the *Govern .NET* suite of applications there is the drag and drop feature that allows for grouping of the results in the grid.

The space above the columns is referred to as the *Grouping Area* (**B**). This space expands to accommodate column names as they are added.

> **Note:** In order to Group by Columns in a pane that is set to Auto Hide, click the Pin icon in the upper right hand corner (**A**) to temporarily disable the Auto Hide mode.

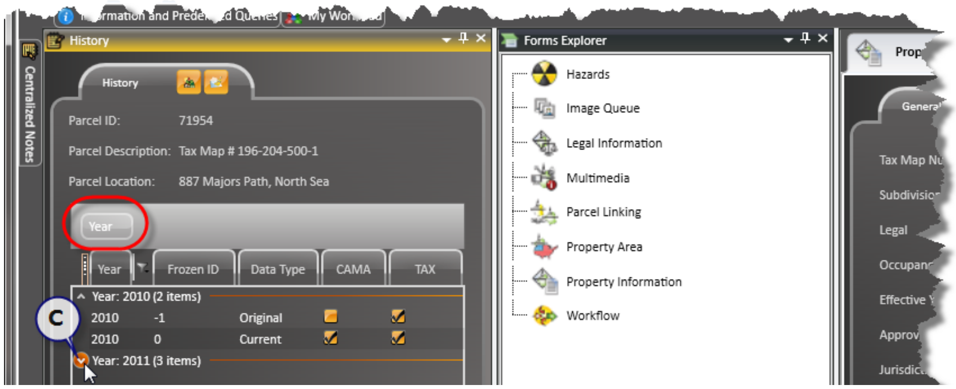
Grouping History Pane Columns by Headings

History data can be grouped to obtain different perspectives about the data. For example a grouping by year will allow you to see the number of records that are available within each year. *History* Pane columns can be grouped by any of the following, *Year*, *Frozen ID*, *Data Type*, *CAMA*, and *TAX*. For example, to group by *Year*, we would do the following:



1. Click and drag the *Year* 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 observe that the data has now been grouped according to the *Year* 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 (**C**) to expand or contract the content listed.

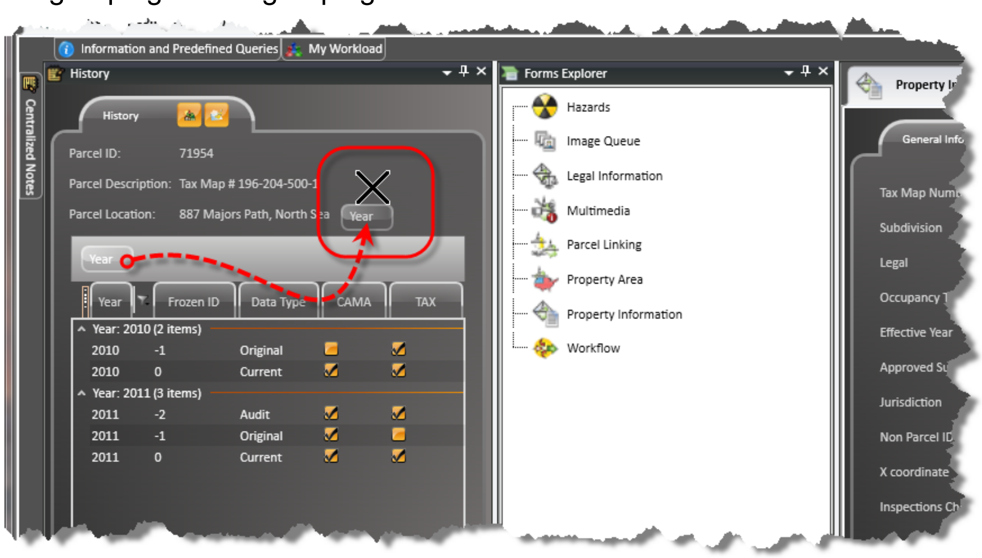


Multiple columns or attributes can be grouped by dragging and dropping them into the *Grouping Area*. Additional columns will appear as subgroups within the original group.

Removing Column Groupings

To remove column groupings from the *Grouping Area*:

1. Click and drag the grouped or 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.



GovernGovern Searches

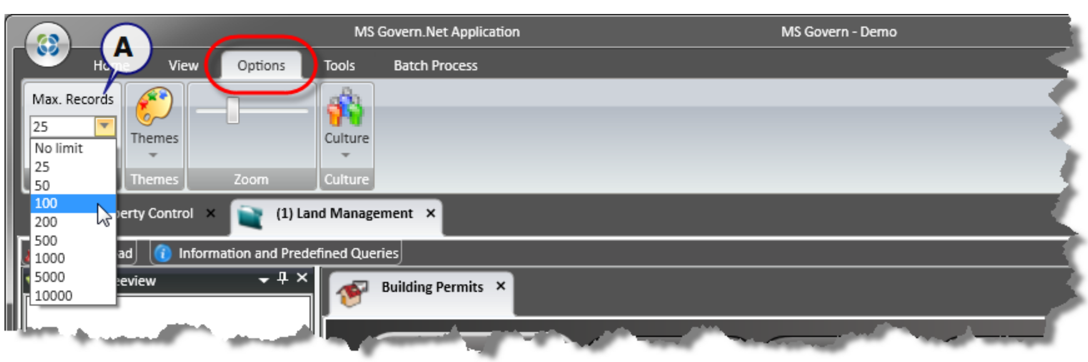
Overview

Govern’s search system allows you to perform targeted searches, i.e. you can search for a specific tax map number, or you can be more general with multiple parameters like owner, location, etc., street name, and or house number. This is all accomplished through Predefined 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 the specified parameter that had been entered.

Specifying Maximum Records

Under the Options tab on the ribbon, you can specify the maximum number of records that are displayed in the Search Results pane, Keep in mind that when the default Max. Records (**A**) parameters 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 from the search. Additional sorting can occur, but the sort will be only on the records obtained.



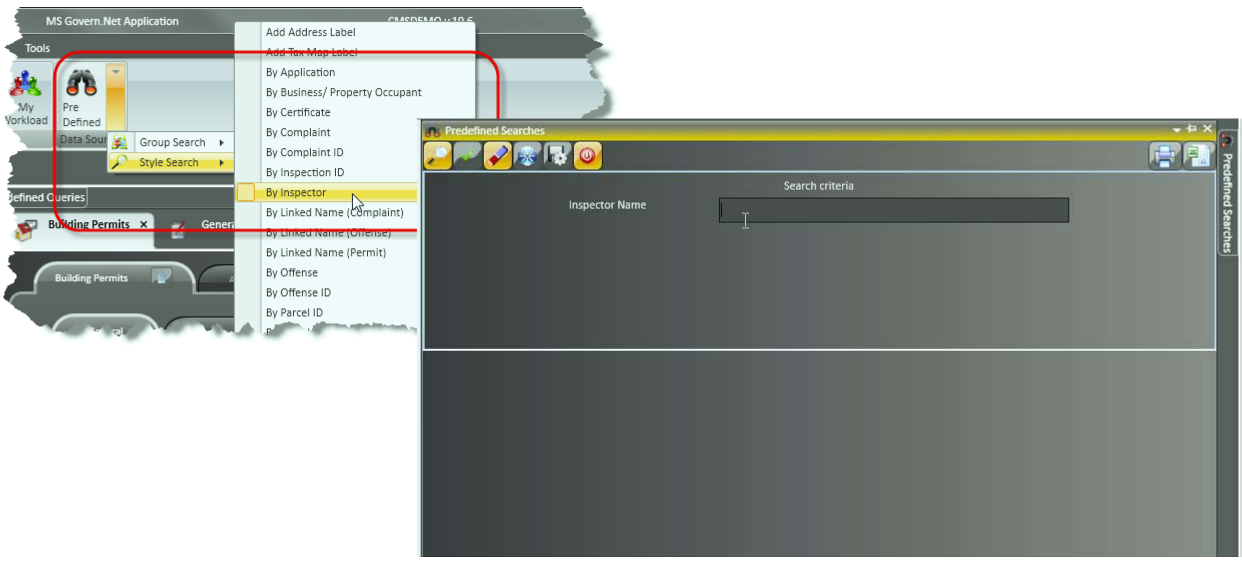
Searching for Records

In *Govern* there are two (2) ways to locate records:

- **Style Search**
- **Group Search**

Style Search

The *Style Search* displays a search form created for a specific search type, e.g. *By Inspector*, *Parcel ID*, *Tax Map*, etc. This type of search is best used in situations wherein you are certain of the type of parameter that you would like to search for. For example, if you know that you are searching for a specific *Permit ID*, it is straightforward to use the Permit ID style search.



To select a Style Search...

1. On the Ribbon, click *View* > *Pre Defined* > *Styles Search* > "**Select a Style Search**".

Group Search

The Group Search is a collection of preset searches. This collection will allow you to perform a search with the added benefit of multiple criterias. For example, with a Search Group, you can perform a Property Search but with the option to search by one or more criteria, i.e. Parcel ID, Tax Map, Property Division, etc.

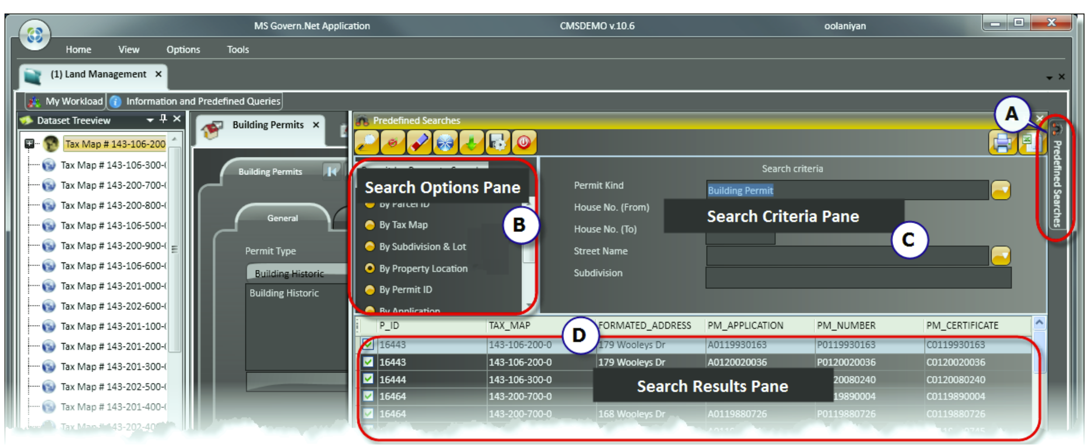
To select a Group Search...

1. On the *Ribbon*, click *View* > *Pre Defined* > *Group Search* > "**Select a Group Search**".

This will configure the Predefined Searches tab to display with the selected search.

Predefined Searches Form

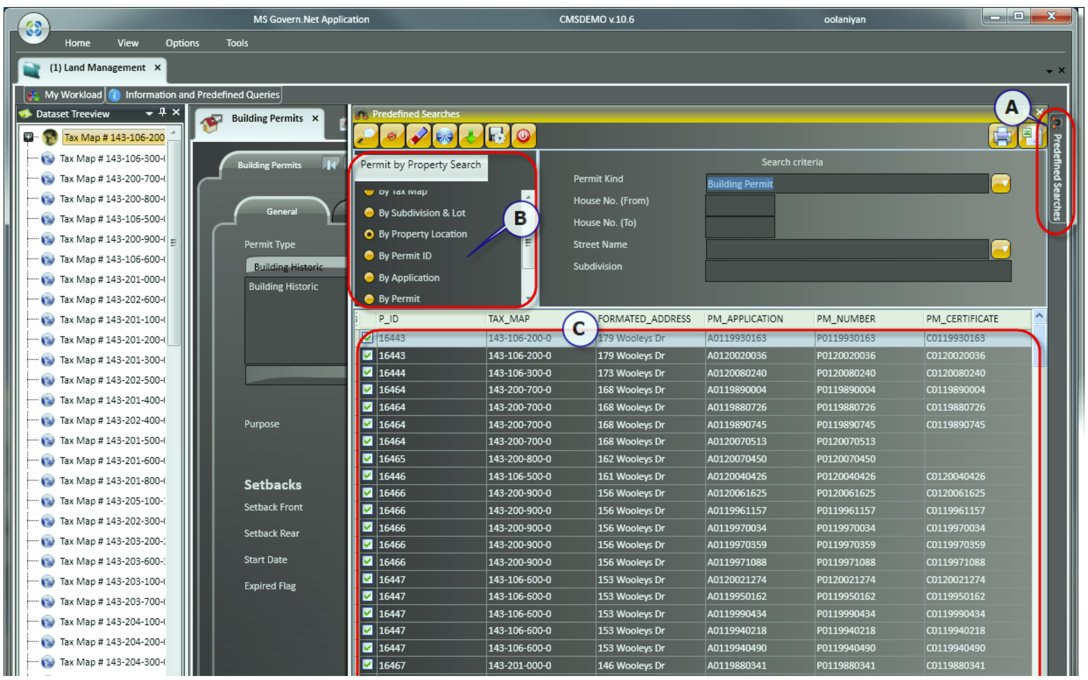
The Predefined Searches form, by default is in Auto-Hide mode and is displayed by hovering your pointer over the Pre-defined Searches tab (**A**).



Search options are selected in the Search Options pane (B), search criteria fields are filled out in the Search Criteria pane (C), and the results are displayed in the Search Results pane (D).

To search for a permits, licenses, approvals, bonds, decisions, or any Land Management related items, through any *OpenForm*:

1. Hover you pointer over the Pre-defined Searches tab to display the *Pre-defined Searches* form.
2. In the form, choose an option under the Permit by Property Search column (**B**).



3. Click **Search**.

The results will be displayed in the search results pane of the search form (**C**).

Note: Search results are displayed despite the fact that no fields are completed in the Search Criteria pane; results can be further refined by completing these fields.

Tip: To speed up your search, fill in as many parameters as possible or enter a specific reference; such as the permit ID or certificate number.

Wild Card Character

Note: The use of the wild card (*) is not supported in the default searches. In addition Wild Card characters are not supported in an Oracle environment.

The use of wild card characters is dependent upon how the searches were created in the *Govern New Administration* (**GNA**). When users create their own Dynamic Searches, they can create provisions for the use of the *wild card* character. The current list of default searches are not configured to allow the use of the “wild card” character.

Depending on which SQL clauses are used to build the search, i.e. the use of the “LIKE” clause, as opposed to “=” can result in an exact match versus results that are similar or contain an entered character.

Predefined Searches 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 to the Search Result: 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 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.

 **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).

 **Exit:** Click *Exit* to close the search interface. This is the equivalent of a click on the Close icon in a window. When you click **Exit**, the *Auto Hide* feature is also disabled and will need to be restored.

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

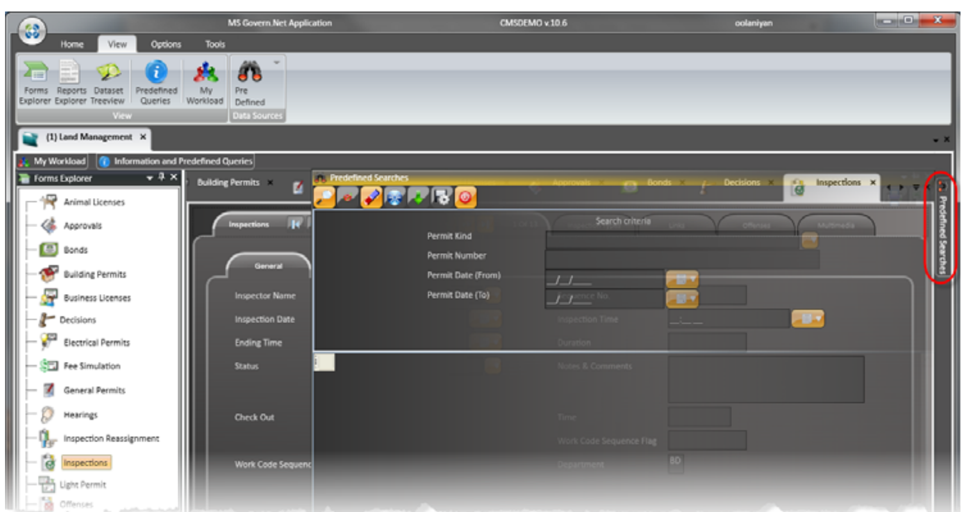
 **Export to Excel:** Click to export the results of your query to an unformatted Microsoft Excel file.

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.

Performing Searches

To open the Search screen, in Govern go to *View* > *Predefined* > *Style Search* > **By Permit**

The search criteria that is selected will be used to configure the autohide Predefined Searches pane. After selecting your criteria, hover your mouse pointer over the *Predefined Searches* autohide pane.



List of Style Searches

Style Search	Search Criteria
Add Address Label	House No. From/To, Street Name
Add Tax Map Label	House No. From/To, Street Name
By Application	Permit Kind, Application Number, Application Date From/ To
By / Property Occupant	Occupant Status, Last or Co. /First/Ini
By Certificate	Permit Kind, Certificate Number, Certificate Date From/To
By Complaint	Complaint Kind, Complaint Number, Complaint Date From/To
By Complaint ID	Complaint Kind, Complaint ID
By Inspection ID	Inspection ID
By Inspector	Inspector Name
By Linked Name (Complaint)	Complaint Kind, Linked Name Type, Last or Co. /First/Ini
By Linked Name (Offense)	Linked Name Type, Last or Co. /First/Ini
By Linked Name (Permit)	Permit Kind, Linked Name Type, Last or Co. /First/Ini
By Offense	Offense Number, Offense Date From/To
By Offense ID	Offense ID
By Parcel ID	Parcel ID
By Parcel ID (Complaint)	Complaint Kind, Parcel ID
By Parcel ID (Inspection)	Parcel ID, *(Returns Inspection info.)*
By Parcel ID (Offense)	Parcel ID, *(Returns Offense No.)*
By Parcel ID (Permit)	Parcel ID, *(Returns Permit info.)*
By Permit	Permit Kind, Permit No., Permit Date From/To
By Permit ID	Permit Kind, Permit ID
By Project Info.	Project Code, Project Name
By Property Location	House No. From/To, Street Name

Style Search	Search Criteria
By Property Location (Complaint)	Complaint Kind, House No. From/To, Street Name
By Property Location (Inspection)	House No. From/To, Street Name *(Returns Inspection Date, Status)*
By Property Location (Offense)	House No. From/To, Street Name *(Returns Offense No.)*
By Property Location (Permit)	Permit Kind, House No. From/To, Street Name, *(Returns Permit Info.)*
By Property Owner	Owner Status, Last or Co. /First/Ini
By Related Name	Related/Lien Type, Related/Lien Status,
By Scheduling Information	Inspection Status, Inpsection Date From/To, Schedule Type
By Subdivision & Lot	Subdivision, Lot
By Subdivision & Lot (Complaint)	Complaint Kind, Subdivision, Lot, *(Returns Complaint No.)*
By Subdivision & Lot (Inspection)	Subdivision, Lot, *(Returns Inspection info.)*
By Subdivision & Lot (Offense)	Subdivision, Lot, *(Returns Offense No.)*
By Subdivision & Lot (Permit)	Permit Kind, Subdivision, Lot, *(Returns Permit info.)*
By Tax Map	Tax Map Number
By Tax Map (Complaint)	Complaint Kind, Tax Map Number, *(Returns Complaint No.)*
By Tax Map (Inspection)	Tax Map Number, *(Returns Inspection info.)*
By Tax Map (Offense)	Tax Map Number, *(Returns Offense No.)*
By Tax Map (Permit)	Permit Kind, Tax Map Number, *(Returns Permit info.)*
By TX Mailing Index	Mailing Index Type, Last or Co. /First/Ini
By UB Mailing Index	Mailing Index Type, Last or Co. /First/Ini
Display Complaints	Complaint Kind, Complaint Number, Cmplaint Date From/ To
Display Permits	Permit Kind, Permit Number, Permit Date From/To
From PC_EXTERNAL	*No criteria required; loads any data that is in the PC_EXTERNAL tables*

Style Search	Search Criteria
From PM_EXTERNAL	*No criteria required; loads any data that is in the PM_EXTERNAL tables*
GIS Labels - Location Using Selection	Parcel ID *(Returns P_ID and GIS ToolTip)*
PID Account	PIS Account, *(Returns ST_ACCT_ID, P_ID, NA_ID)*

List of Group Searches

The following are a list of the standard default Group Searches that are available in Govern. Note that this list can vary with installations as Group Searches can be created and or modified for users.

Note: The following table lists the Group Search name and the search criteria options that are grouped with it.

Group Search	Search Criteria
GIS Label Query	
Add Address Label	House No. From/To, Street Name *(Returns P_ID and GIS Address label)*
Add Tax Map Label	House No. From/To, Street Name *(Returns P_ID and GIS Tax Map label)*
GIS Labels - Sel. Parcels	Parcel ID *(Returns P_ID and GIS ToolTip)*
A/R Inquiry Search	
By Parcel ID	Parcel ID
By Tax Map	Tax Map Number
By Subdivision & Lot	Subdivision, Lot No.
By Property Location	House No. From/To, Street Name *(Returns P_ID and GIS Address label)*
By Application	Permit Kind, Application Number, Application Date From/To
By Complaint	Complaint Kind, Complaint Number, Complaint Date From/To

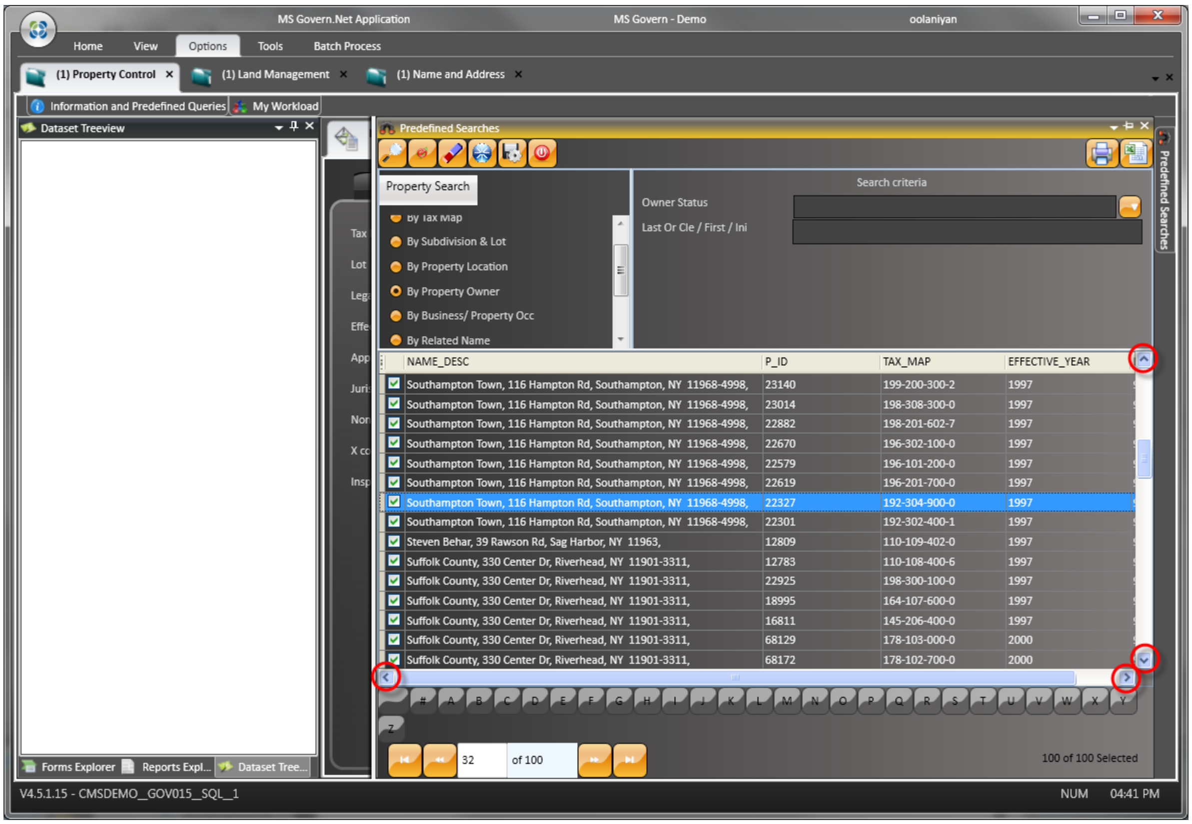
Group Search	Search Criteria
By Offense	Offense Number, Offense Date From/To
By Project Info	Project Code, Project Name
Search by Permit (linked to an address) - Permit by Property Search	
By Parcel ID	Permit Kind, Parcel ID
By Tax Map	Permit Kind, Tax Map Number
By Subdivision & Lot	Permit Kind, Subdivision, Lot
By Property Location	Permit Kind, House No. From/To, Street Name, *(Returns Permit Info.)*
By Permit ID	Permit Kind, Permit ID
By Application	Permit Kind, Application Number, Application Date From/To
By Permit	Permit Kind, Permit Number, Permit Date From/To
By Certificate	Permit Kind, Certificate Number, Certificate Date From/ To
By Linked Name	Permit Kind, Linked Name Type, Last or Co./First/Ini
From PM_EXTERNAL	*No criteria required; loads any data that is in the PM_EXTERNAL tables*
Search by Property - Property Search	
By Parcel ID	Parcel ID
By Tax Map	Tax Map Number
By Subdivision & Lot	Subdivision, Lot
By Property Location	House No. From/To, Street Name
By Property Owner	Owner Status, Last or Co./First/Ini
By Business / Property Occ.	Occupant Status, Last or Co./First/Ini
By Related Name	Related/Lien Type, Related/Lien Status, Last or Co./ First/Ini

Group Search	Search Criteria
By TX Mailing Index	Mailing Index Type, Last or Co./First/Ini
By UB Mailing Index	Mailing Index Type, Last or Co./First/Ini
From PC_EXTERNAL	*No criteria required; loads any data that is in the PC_EXTERNAL tables*
Search by Complaint - Complaint Search	
By Parcel ID	Complaint Kind, Parcel ID
By Tax Map	Complaint Kind, Tax Map Number
By Subdivision & Lot	Complaint Kind, Subdivision, Lot
By Property Location	Complaint Kind, House No. From/To, Street Name, *(Returns Complaint No.)*
By Complaint ID	Complaint Kind, Complaint ID
By Complaint	Complaint Kind, Complaint Number, Complaint Date From/To
By Linked Name	Complaint Kind, Linked Name Type, Last or Co./First/ Ini
Search by Inspection - Inspection Search	
By Parcel ID	Parcel ID
By Tax Map	Tax Map Number
By Subdivision & Lot	Subdivision, Lot
By Property Location	House No. From/To, Street Name
By Inspection ID	Inspection ID
By Inspector	Inspector Name
By Scheduling Information	Inspection Status, Inspection Date From/To, Schedule Type
Search by Offense (Offense Search)	
By Parcel ID	Parcel ID

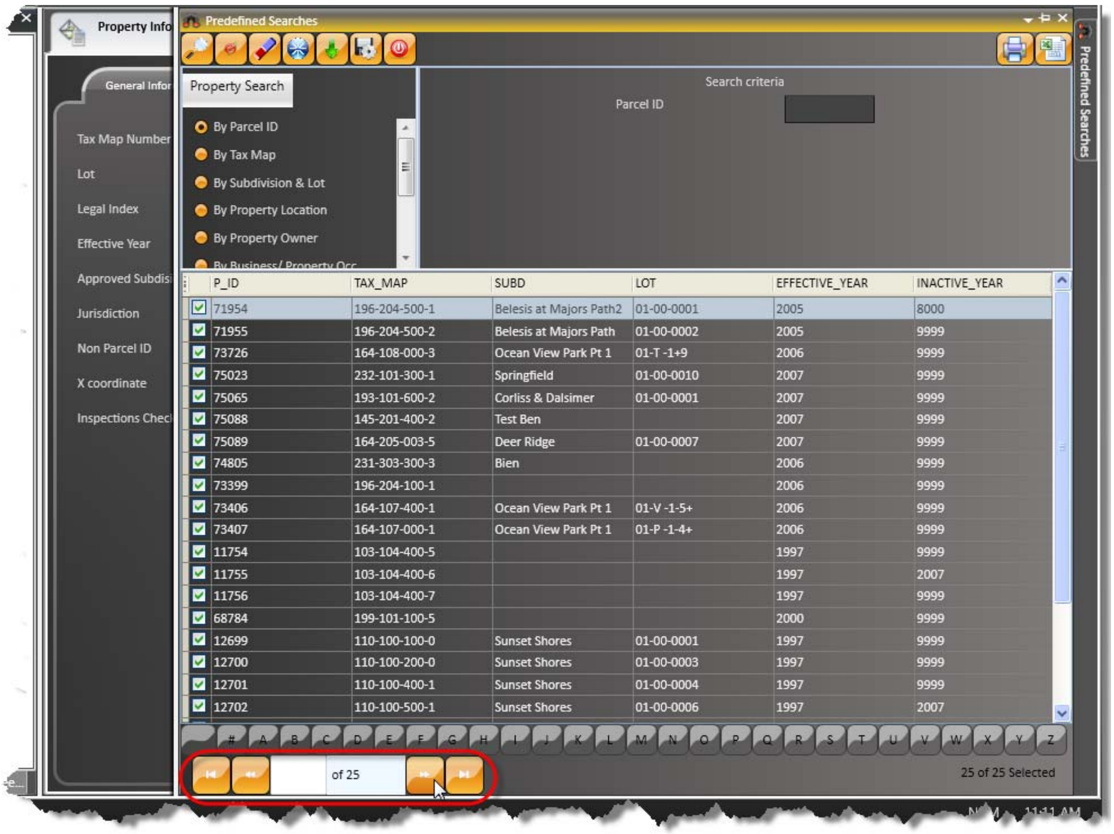
Group Search	Search Criteria
By Tax Map	Tax Map Number
By Subdivision & Lot	Subdivision, Lot
By Property Location	House No. From/To, Street Name
By Offense ID	Offense ID
By Offense	Offense Number, Offense Date From/To
By Linked Name	Linked Name Type, Last or Co./First/Ini
GIS Geodatabase	
By Property Location	House No. From/To, Street Name
By Subdivision & Lot	Subdivision, Lot
GIS Govern Database	
Display Complaints	Complaint Kind, Complaint Number, Complaint Date From/To
Display Permits	Permit Kind, Permit Number, Permit Date From/To

Predefined Searches Results Pane

The *Results Pane* displays the records that match the criteria entered in the Search screen. Use the up and down, and the right and left navigational arrows to scroll through the records matching the search criteria in the grid.



The parcels that match the search criteria are displayed in the Search Results pane. Use the left and right navigational arrows at the bottom of the search results pane to scroll through the recordset or double-click the record to load and view it in the OpenForm.



Property Control Search

The *Property Control Search* is used to search for existing property records. You can sort by the columns displayed in the *Search Results* pane. For example you can sort by name description, tax map number, property ID or effective year, all dependent upon your search criteria.

To perform a property search:

1. Select *Pre Defined* > *Group Search* > **Property Search** to configure the *Predefined Searches* pane.
2. Place your cursor over **Predefined Searches** in the **Govern** interface; the *Autohide* tabbed pane will appear.
3. Under the *Property Search* list, select one of the search criteria. *Refer to List of Group Searches on page 39 for details.*

Property Search: Parcel Information Parameters

Parcel ID (P_ID): Enter the Parcel ID and click Search. Previously, this option was located on the Add Info tab.

Tax Map Number: Enter the tax map number of the property and click Search.

Subdivision Name/Lot: Enter the subdivision name or lot number and click Search.

Property Search parameters

Property Location (From House No. – To House No.): Enter a range of civic numbers and click Search.

Owner Status: Select the status of the occupant from the drop down list. Options are **Alternate Source**, **Current**, or **Previous**.

Occupant Status: Select the status of the occupant from the drop down list. Options are **Alternate Source**, **Current**, or **Previous**.

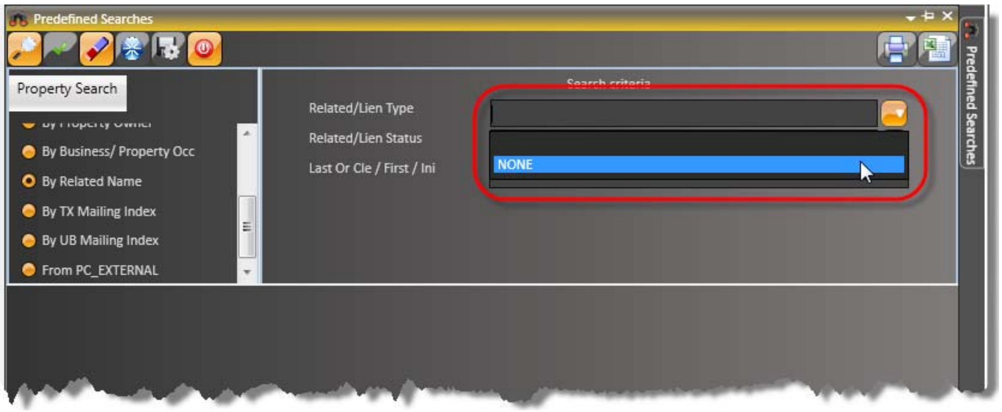
Last or Company / First / Initial: Enter the full or partial name and click Search.

Name Fields

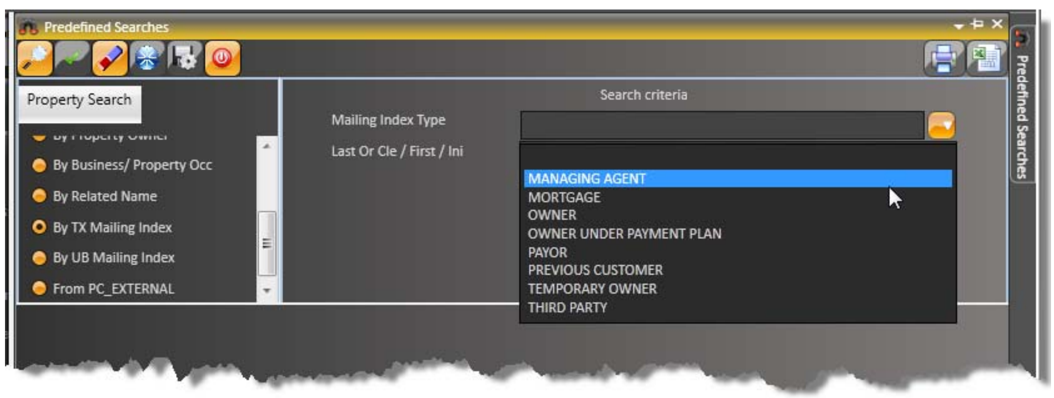
Related / Lien Type: Select the name type from the drop-down list, Related/Lien Name Index, Mailing Index, Owner or Occupant (Table: VT_SY_NA_LINK).

Related Name: Select this option to retrieve individual and company records entered through the Related/Lien Names function (Table: VT_

USR_LNAMEST). When this option is selected, the Related / Lien Type and Related/ Lien Status fields appear on the form. .



Mailing Index Type: This field is displayed if Mailing Index is selected in the Link Type field. Select Managing Agent, Mortgage, Owner, Payor, Previous Customer, Temporary Owner or Third Party (Table: VT_SY_MAILTYPE).



Owner Status: Select one of the following options: **Current**, **Previous** or **Alternate Source**.

Last or Company / First / Initial: Enter the full or partial name and click Search.

Type of Name

Select one of the following types to retrieve only the names formatted as (Table: VT_SY_MAILTYP):

- Company

- Individual
- No Format

Leave the field blank to retrieve names formatted in all types.

Multimedia

Overview

The *Multimedia* tab is used to link any type of multimedia document to the current record in an *OpenForm*. For example, you can link video or image files to a violation in the Offenses OpenForm, documents relating to parcel splits, or scanned building plans to a *Building Permit*. You can also store a link to any type of OLE enabled document, such as a Microsoft® Word, Excel, or an Adobe Acrobat PDF file. An unlimited number of text lines can be stored with the file and each department can define their own multimedia codes.

The *Multimedia* tab can be configured with any number of different *OpenForms* in order to create a link to a:

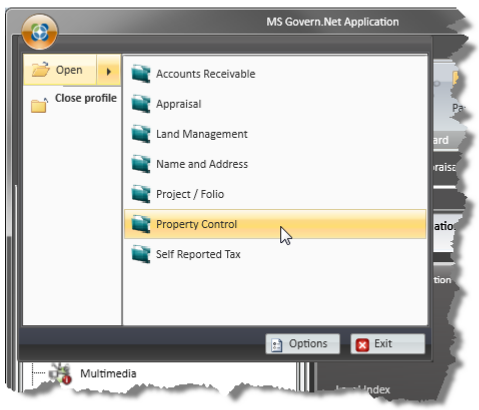
- Parcel
- Name
- Inspection
- Hearing
- Permit
- Workflow
- Offense
- License
- Sale

- Activity.

Note: If you are not able to follow the next steps, because you do not see the appropriate multimedia codes, refer to the *Defining Multimedia Codes* section in the *Property Control* guide.

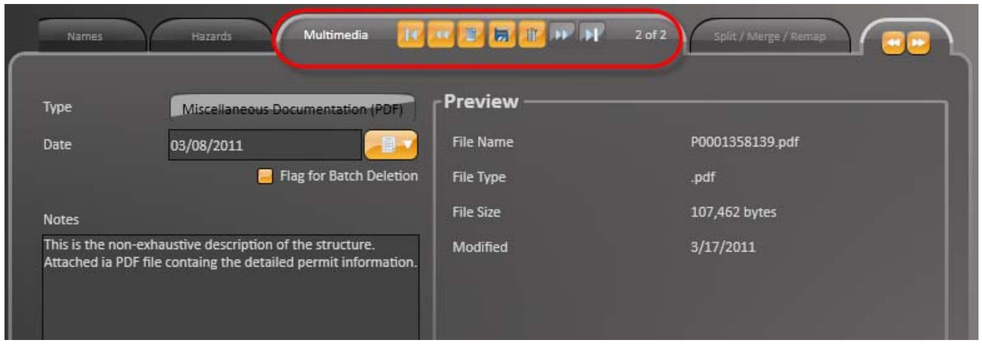
To access the Multimedia tab, when available, select a record...

1. In Govern, click on the Govern suite button and select *Open* > **Property Control**.



2. Click the *Forms Explorer* tab to display the *OpenForms* that are in the **Profile**.
3. When the **Forms Explorer** (**A**) is displayed, double click on the required *OpenForm*.

4. Click to select the **Multimedia** tab.



Note: The *Multimedia* tab can be found in numerous profiles as it is a general usage form that allows users to attach multimedia files to records as needed.

Creating a New Multimedia Link: Click **New** to reset the function. Then, follow the instructions under *Linking Multimedia Documents* on page 54.

Saving a Multimedia Link: Click **Save** to save the link to the selected Multimedia document.

Deleting a Multimedia Link: Click **Delete** to delete the current record from the database.

Browsing Multimedia Documents: Click **Browse** to view all records related to the current record.

Adding a Multimedia Document

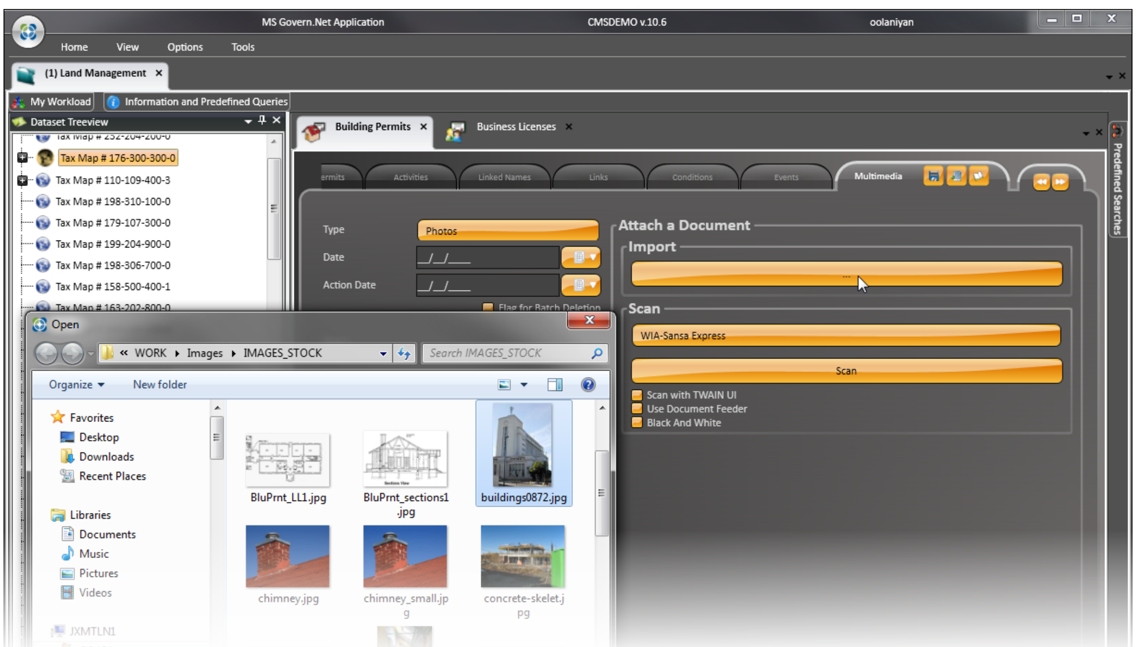
Note: You need to create applicable multimedia codes, before proceeding. *Refer to the Defining Multimedia Codes section in the Govern for Windows 10.6 Property Control guide for more information*.

To add a *Multimedia Document*...

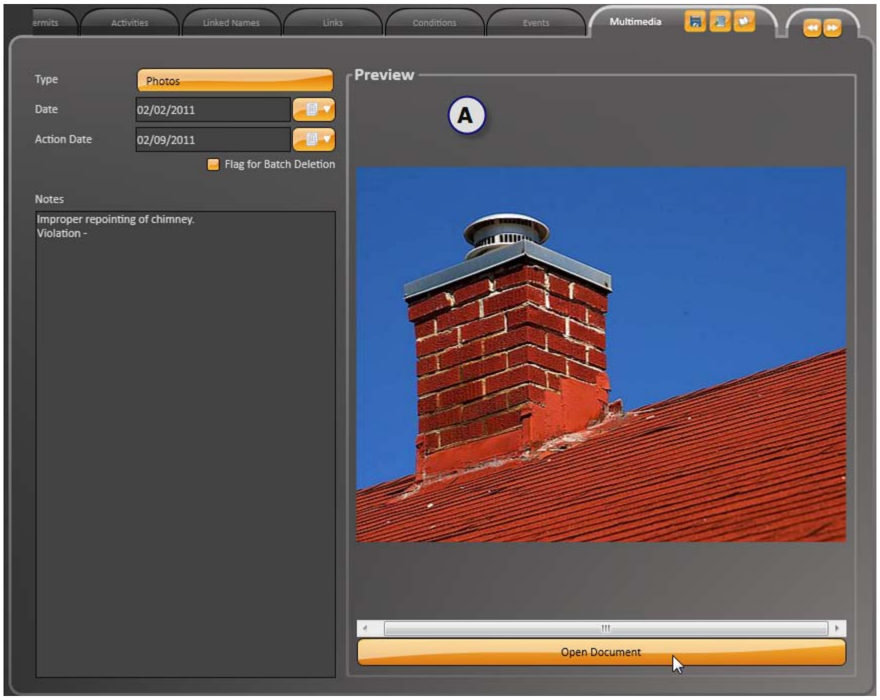
1. Click **New Multimedia Document** .

2. Select a document type from the drop down menu. For our example we will be adding an image.

3. New parameters will are displayed on the form; in the **Attach a Document** group, click “**...**” to locate a document, for this example, an image is selected.

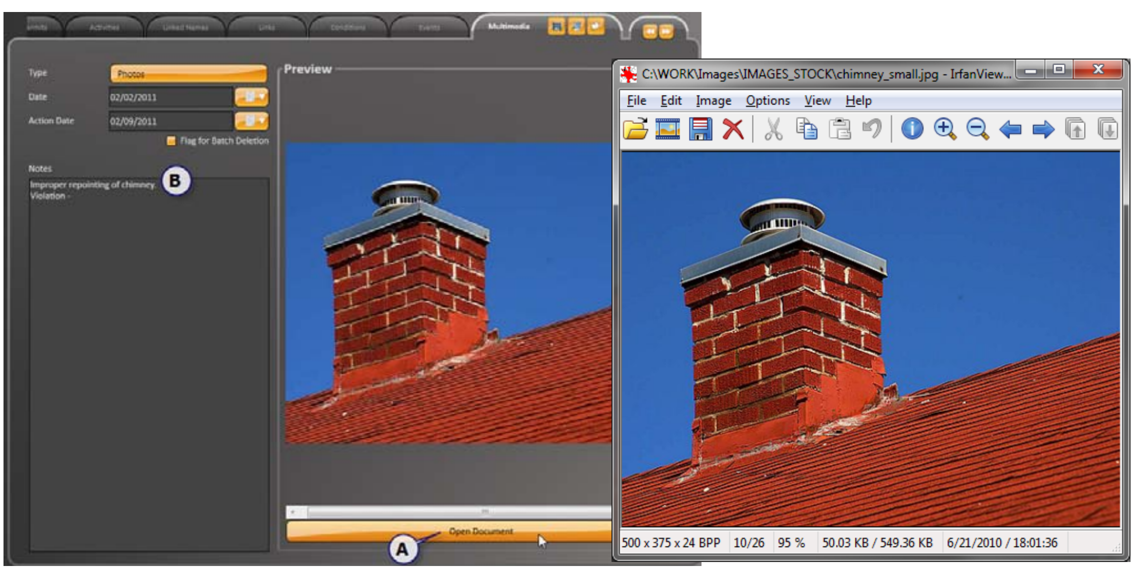


4. When the image is imported, it will appear in the Preview area (**A**).



5. To view the full image, click Open Document (**A**); the image will be displayed in the default viewer that has been configured in the system for the image type.

6. Add any notes that are related to the image can be added in the **Notes** field (**B**).

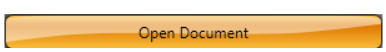


7. When complete, click **Save**.

Note: Only the name of the image will be stored in the database.

Multimedia Document Types

Govern can support a variety of *Multimedia* documents. These documents can range from image formats such as .BMP, .TIF, .JPG, to *Adobe Acrobat* .PDF, or *Microsoft Word* .DOC files, etc.



Displaying the Image: When a multimedia image document has been linked to the current record, the document will be displayed in the right hand pane when you open the form. Otherwise, click **Open Document** or doubleclick on the image the *Preview* pane to display the document. The document will be displayed with the application that is set as the default for viewing the file type that is selected. For example if you have *Microsoft Word* installed and you preview a **.doc** file, *Microsoft Word* will be launched. Use the controls of the previewing application to close the window and return to the *Multimedia* tab.

Editing a Multimedia Document: The previewed document can be edited if the previewing application has editing capabilities, i.e. Microsoft Word™ for .doc file types or Adobe™ Photoshop™ for editing images, etc.

Multimedia tab Parameters

Type: From the **Type of Information** drop-down list, select the type of file you are linking to the current record (Table: VT_USR_DEPINF).

Note: The remaining fields in this section are displayed according to the setup in Govern Admin. *Refer to Defining Multimedia Codes in the Property Control guide for details*.

Sub-Code: This field is displayed if a sub-code table has been defined for the code on the *Multimedia Code Maintenance* form in Govern Admin. Select a code from the drop-down list.

Date: This field is displayed if the **Record Information by Date** option is selected on the *Multimedia Code Maintenance* form in Govern Admin. It is used for sorting the records by date. By default, the current date is displayed. Double-click in the field and select an alternate date from the pop-up calendar to modify the date.

Action Date: This field is displayed if the **Use Reminder or Action Date** option is selected on the *Multimedia Code Maintenance* form in Govern Admin. Double-click in this field and select a date from the pop-up calendar. This field can serve as a reminder to link a Multimedia document to the current record on this date. This field can also be used for reporting.

Notes: Enter an unlimited number of notes / comments in this space.

Flag for Batch Deletion: Select this option to designate the document for deletion at a specified date through a batch process.

Linking Multimedia Documents

To link a multimedia document:

1. Click **New**.
2. Select a **Type**, from the drop down menu. The options that will be available are based on the multimedia codes in *Govern Admin*.
3. Select a **Date** and or an **Action Date** from the
4. Select the **Type Of Information** from the drop-down list.
5. Follow the steps for one of the following:

- Linking an image
- Entering multimedia text

Capturing an Image from an External Device

Images or documents can be imported from an external device like a flatbed scanner or an image capturing device like a digital camera. As long as the device is recognized on the computer that Govern is installed on, images can be imported from it.

To import an image from an external capture device...

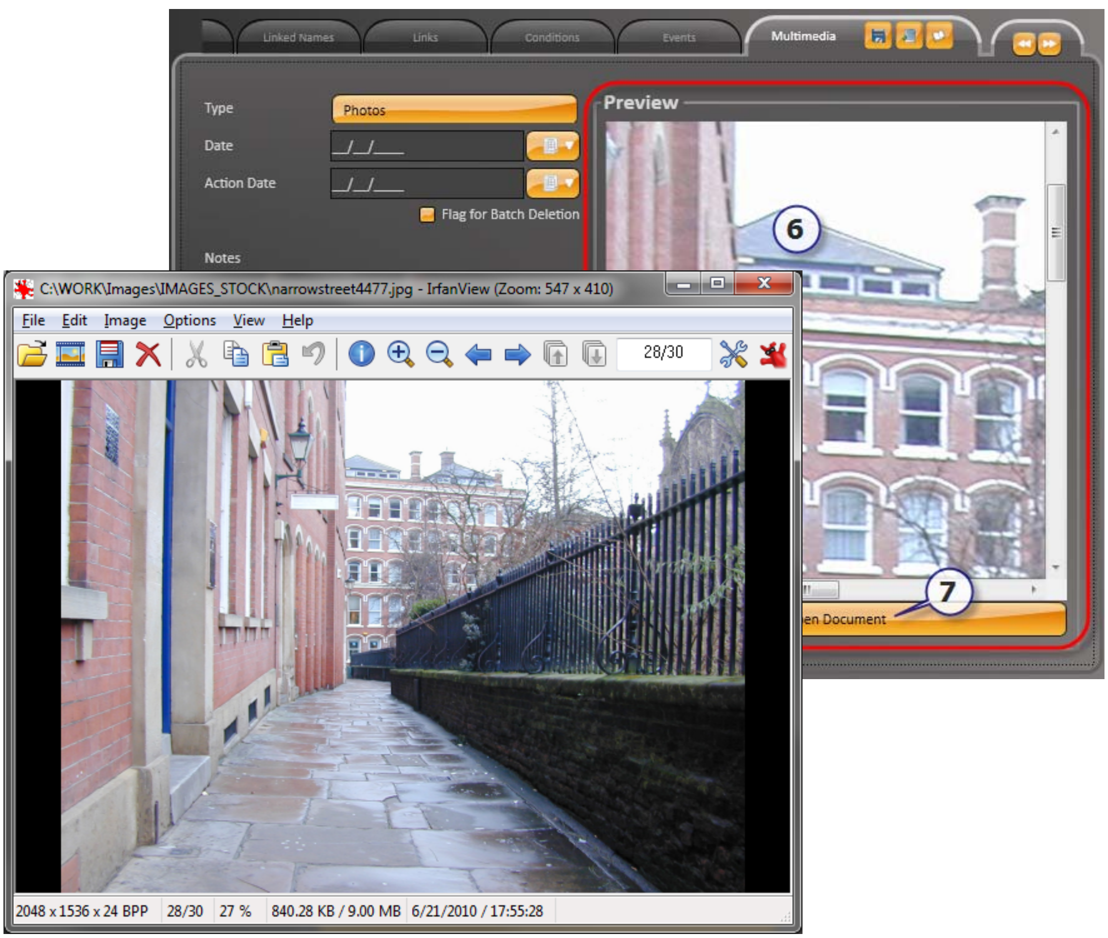
Note: Prior to starting this procedure, ensure that the capture device is recognized by Windows and has been configured prior to starting *Govern*. Refer to *Windows Help* for instructions on how to configure external image capture devices.

1. Click **New** on the *Multimedia* tab.
2. Select a Multimedia attachment type from the drop down menu.

3. Ensure that your capture device is selected in the *Scan* group.
4. Select the **Scan with TWAIN UI** option. If a document feeder is being used for scanning multiple documents select the **Use Document Feeder** option.

Note: In order to use a scanner for image capture, the Scanner interface must support the TWAIN UI protocol to communicate with the application. *Refer to your scanner manufacturer for details*

5. Text documents and most correspondences can be scanned as Black and White; select the **Black and White** option.
6. Click **Scan** to initiate the scanning process.
7. When the scan is complete, the image will appear in the Preview area of the interface.



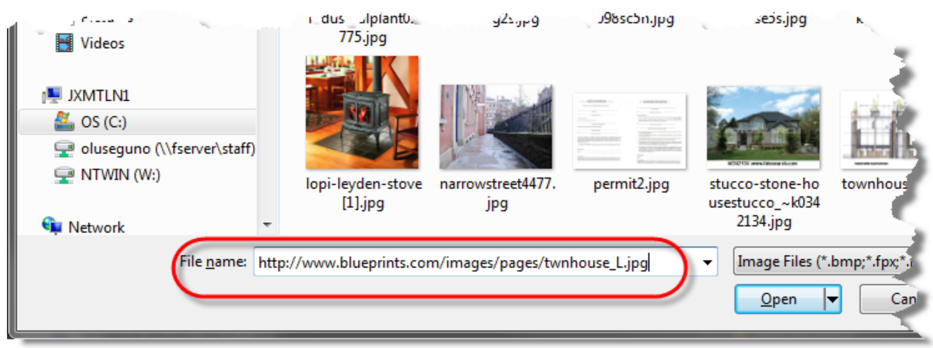
8. Click **Open Document** to display the image in a program that is configured to display the image file type.

Inserting an Internet Link

It is possible to link to files that are located on a network or at a specific Uniform Resource Locator (URL), sometimes referred to as an Internet address.

To link to a URL:

1. Follow the above steps for inserting the various types of files.
2. When navigating to the files, specify a path that is a valid Internet URL.



When linking to internet files, always ensure that the publiishing rights of the image have been secured. In addition ensure that the URL is constant so as to avoid broken links..

Note: External files remain stored under the Multimedia path and not in the database. If the image is relocated, the link will be lost.

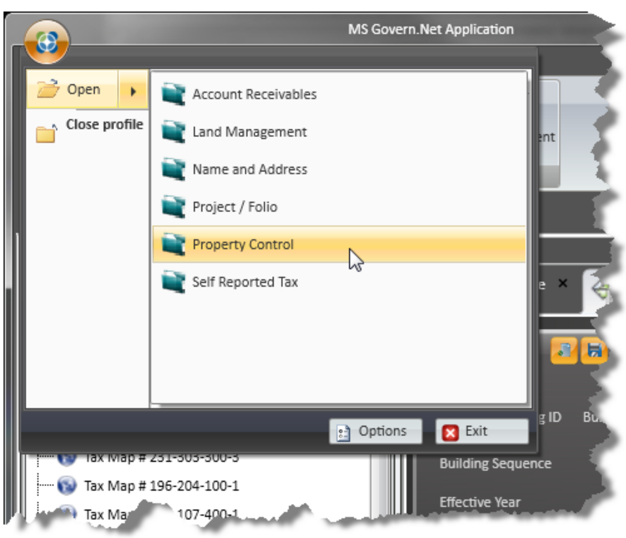
Image Queue

Overview

The *Image Queue* is an *OpenForm* that is used to link a *Multimedia* document to a specific record. This form is set up in *Govern Admin*, on the *Permit System Activities* form. One common scenario for the *Image Queue* is when citizens arrive at the municipal office to submit relevant documents, the municipal employee will record the entry through the *Multimedia* tab of the *OpenForm* with an indication that the submitted document is to be scanned and attached to the record, i.e. “queuing up” the records. At a later period, the *Image Queue* is opened, each entry is selected, and by various input methods, e.g. document scanner, the image is attached to it.

To access the *Image Queue OpenForm* in *Govern*, search and select a record...

1. In *Govern*, click on the *Govern* suite button and select *Open* > **Property Control**.



2. Click the *Forms Explorer* tab to display the *OpenForms* that are in the **Profile**.

3. In the **Forms Explorer** pane, double click on the required *Image Queue OpenForm* icon.

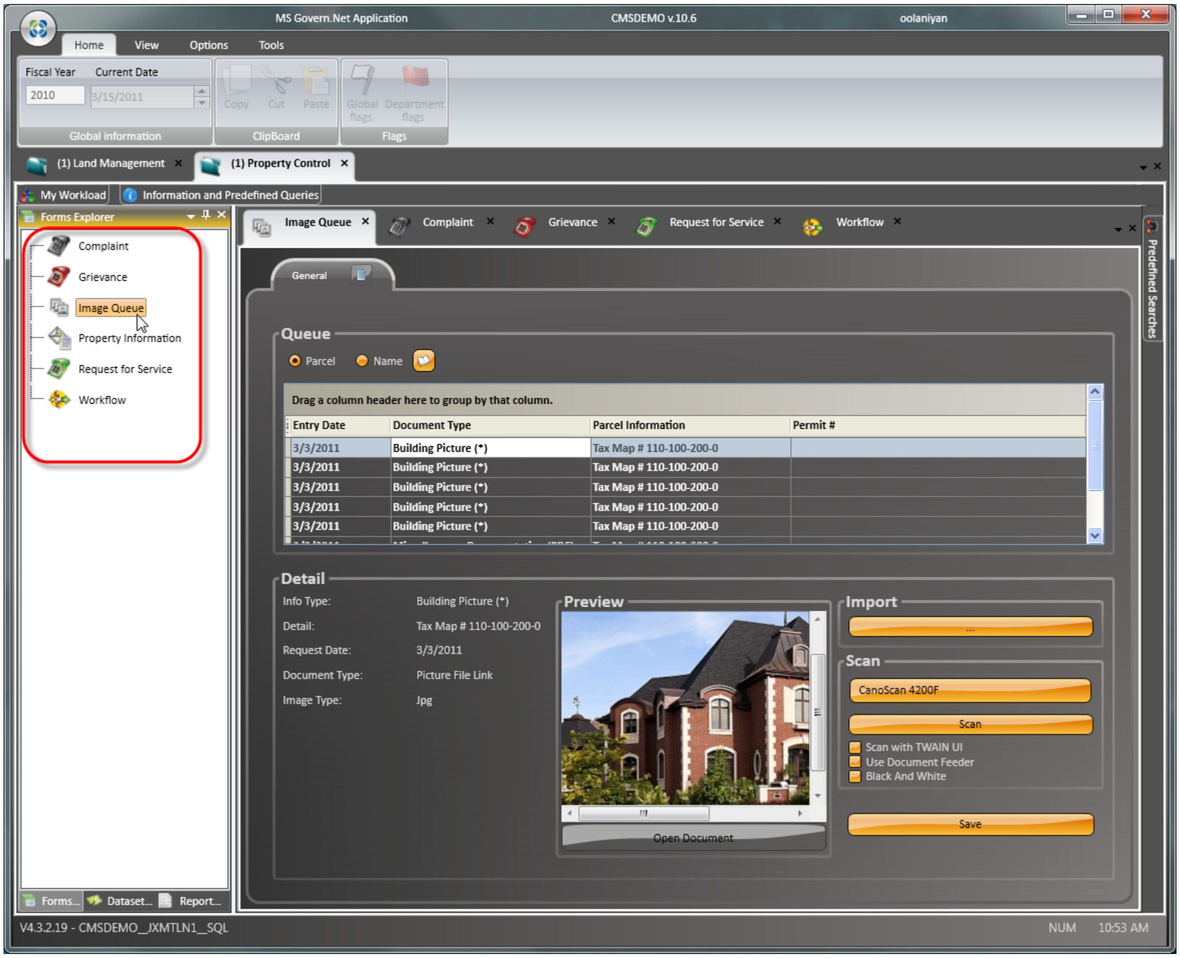


Image Queue - General tab

The Image Queue is a single tab *OpenForm* that is separated into two sections, a *Queue* group, and a *Detail* group.

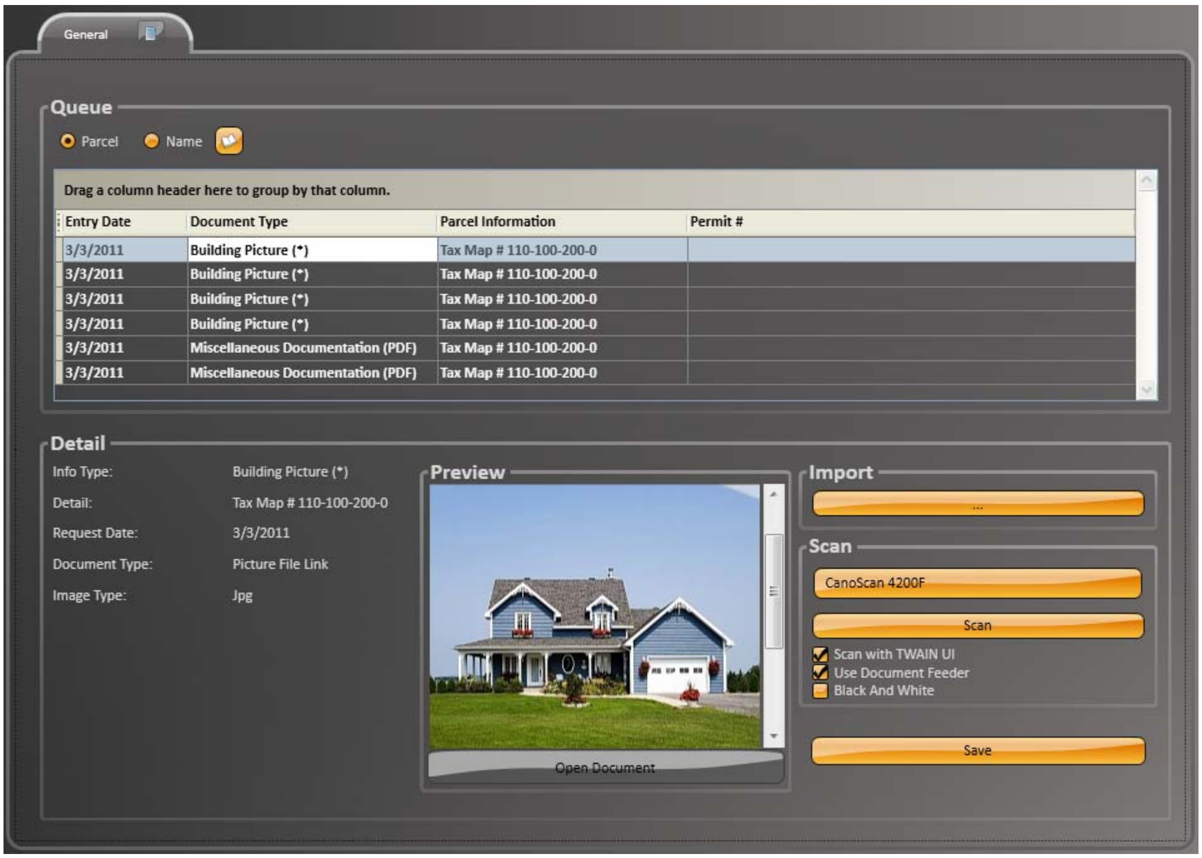


Image Queue Parameters

Queue group

Parcel: Click the Parcel option to display the queue entries according to parcel number.

Name: Select the name option to view the queue entries according to name.

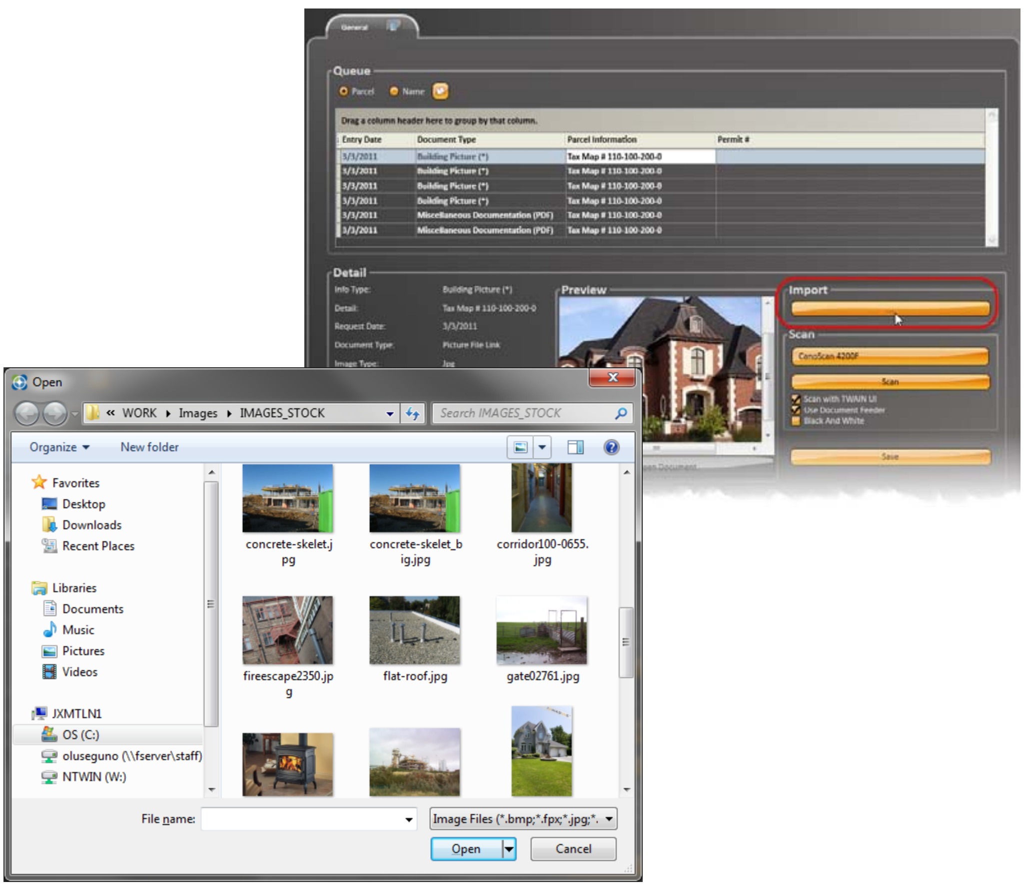
Image Queue Command Buttons

Note: A **Scan** button is displayed when a correctly configured scanner has been connected to the system. Click the scan button to start the process automatically.

Inserting a Multimedia Document: In the grid located in the Queue group, click to select the line item/record. When a line item in the Queue group is selected, the parameters and buttons in the Detail group become active.

To insert a Multimedia Document - Import

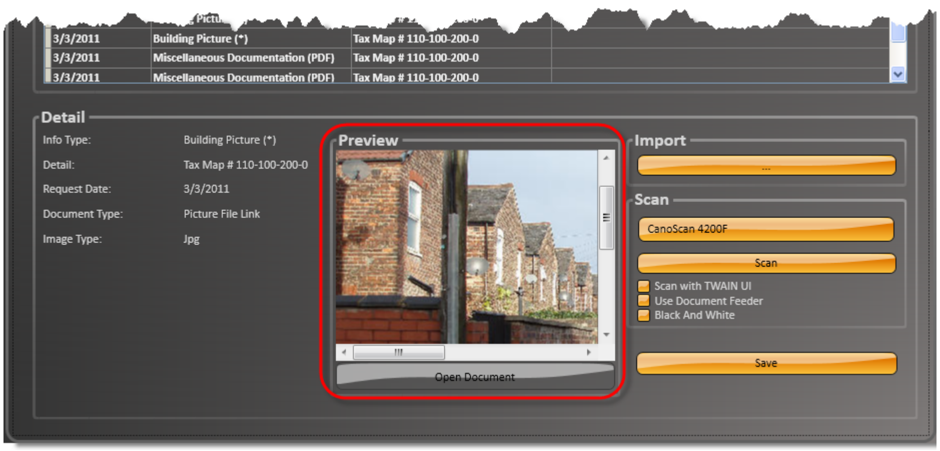
1. In the *Import* group, click **"..."** to display the *Windows Open* screen.



2. Use the *Open* window to browse any available images or documents.

3. Select the multimedia document with a double-click, or click to select and click **Open**.

If a preview is available, it will appear in the *Preview* area in the form. To view the full image, either double click on the preview images, or click the **Open Document** button.



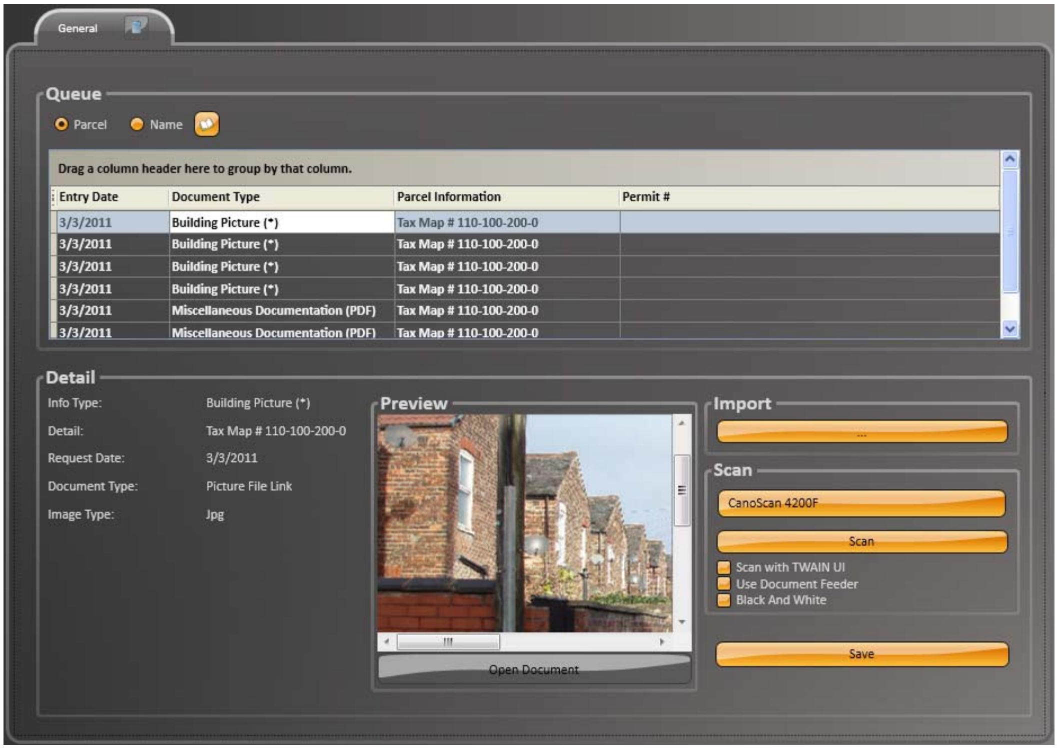
Clearing the Multimedia Document: Click **Clear** to remove the current multimedia document from the screen.

Note: You will only be able to attach the same document type that was requested at the queuing process. The requested document type is specified under the *Document Type* column in the grid, i.e. pictures will only allow images, and documents will only allow specific document types like .PDF's or Word .doc files to be imported.

View of a Document on a Full Page: To view a multimedia on a full page, double-click on the image or click **Open Document**.

Saving a Multimedia Document: Click **Save** to save the multimedia document link to the current Property, Permit, License, Sale, etc.

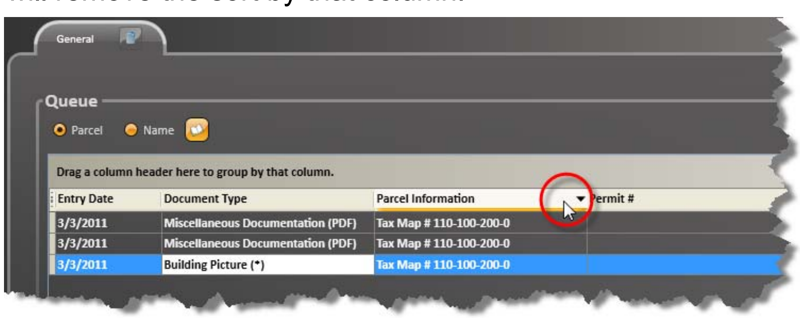
Image Queue Grid



The Image Queue grid, offers several display options. As with many information or result grids in Govern, column headings can be rearranged, and results can be sorted according to the column heading.

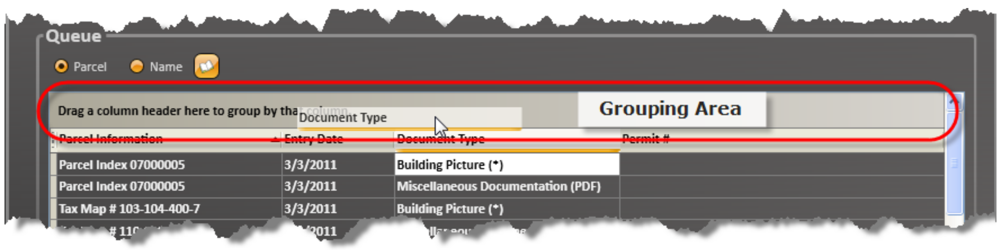
Sorting by Column Headings

To sort by the column heading, click on the column header. 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.



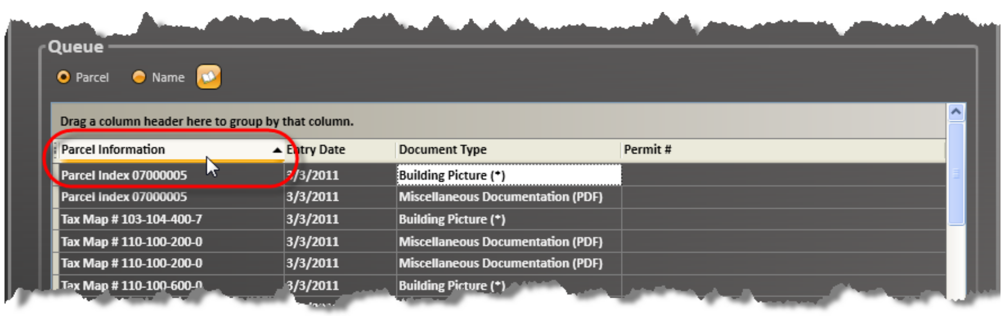
Grouping by Column Headings

The QueryTools drag and drop feature allows for additional possibilities in the Query Result pane. The space above the columns is referred to as the Grouping Area. This space expands to accommodate column names as they are added.



For example, with the following columns..

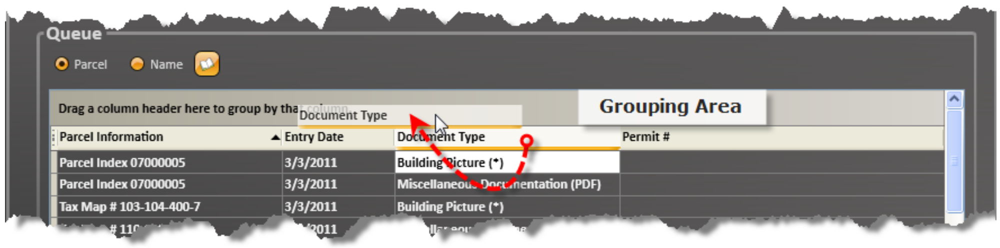
- **Entry Date**
- **Document Type**
- **Parcel Information**
- **Permit #**



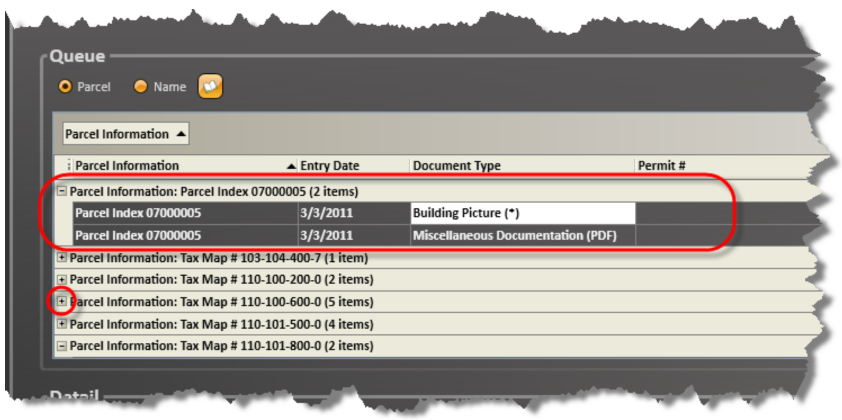
We want to view the data grouped according to the parcel information.

To group according to the parcel...

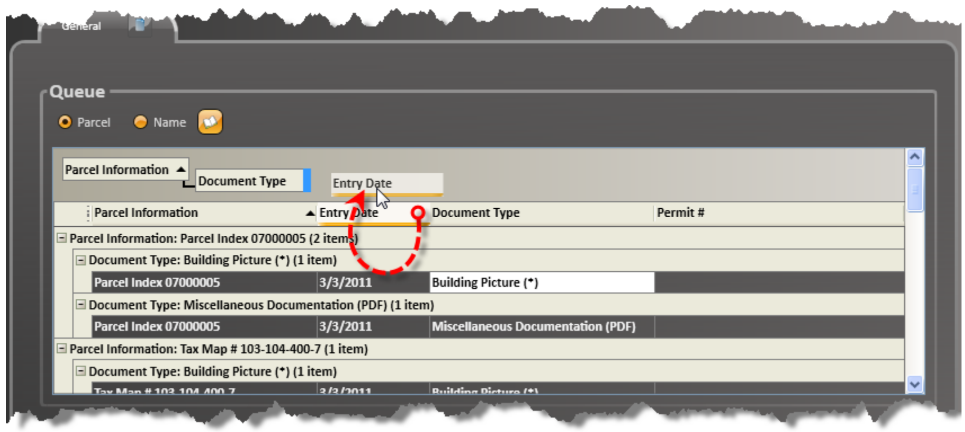
1. Click and drag the *Parcel Information* column into the Grouping Area above the columns; this is the empty area that is marked "*Drag a column header here to group by that column.*"



2. You will note that the data has now been grouped according to the **Parcel Information** 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 to expand or click on the "-" to contract the content listed.



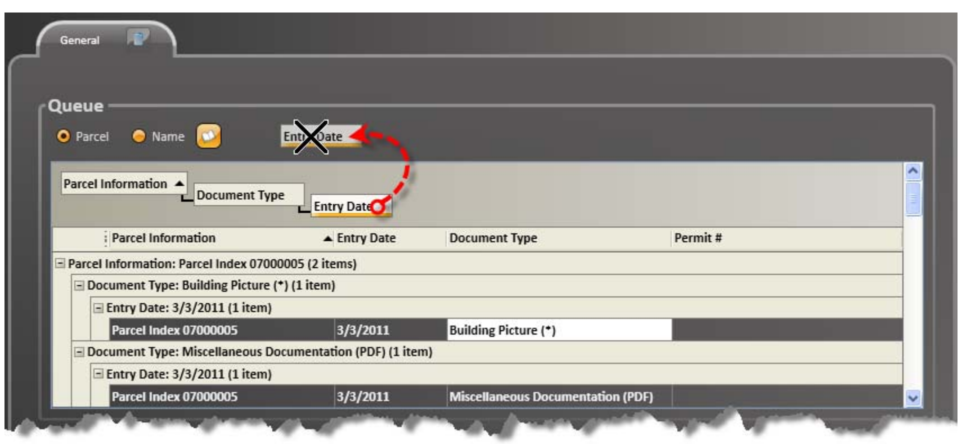
Multiple columns can be grouped by dragging and dropping them into the Grouping Area above the column headings. Additional columns will appear as subgroups within the original group.



Removing Column Groupings

To remove column groupings from the Grouping Area:

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



Column Headings

Multimedia Info Type: This field displays the multimedia document type (Table: VT_USR_DEPINF).

Requested Document Type: This field displays the requested document type (Tables: VT_SY_ FF_TYPE).

The different *Document Types* can have the following status:

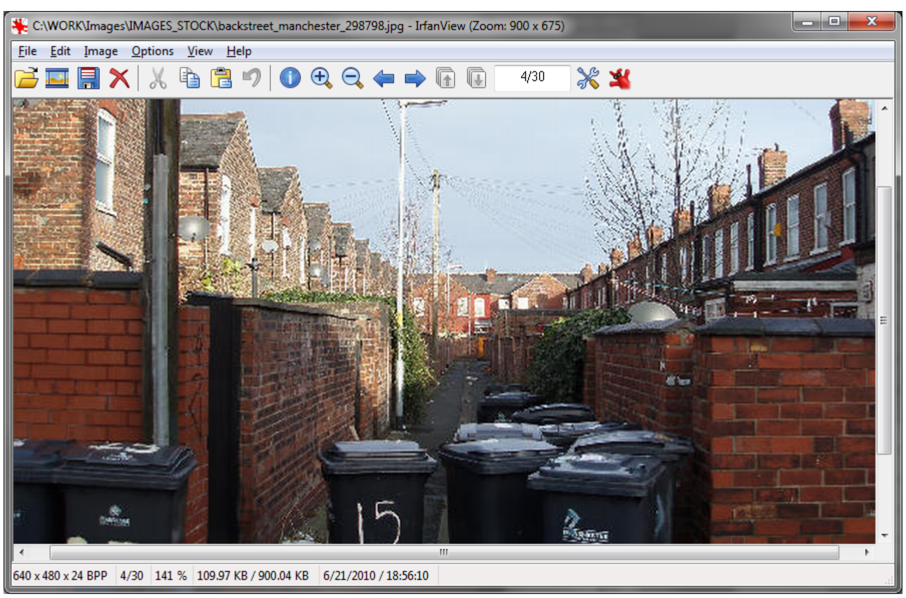
- 0: Queuing
- 1: Linked and in archive Level 1
- 2: Linked and in archive Level 2
- 3: Linked and in archive Level 3

Entry Date: This field displays the date of the entry made in the Multimedia image queue.

Note: The current Tax Map Number, Name, and / or the Permit/License Numbers are displayed on the screen.

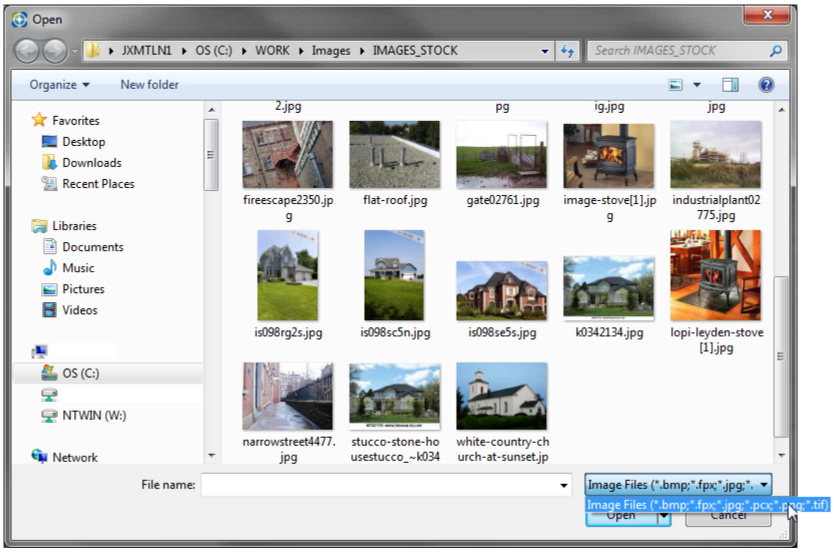
View a Multimedia Document on a Full Page: To view a document on a full page, double-click on the picture or click **Open Document**.

Note: The document will be displayed with the application that is registered to display on the target system, for example if Microsoft Word is installed, it will display **.doc** file types.



Close the screen to resulting screen to *Govern*.

... (Insert): Click **"..."** to display the Windows file browser and select Multimedia Documents to add to the current record. Double click on an image to select it.



Note: If the directory you select contains many multimedia documents, it can take a long time to display them.

Names & Addresses

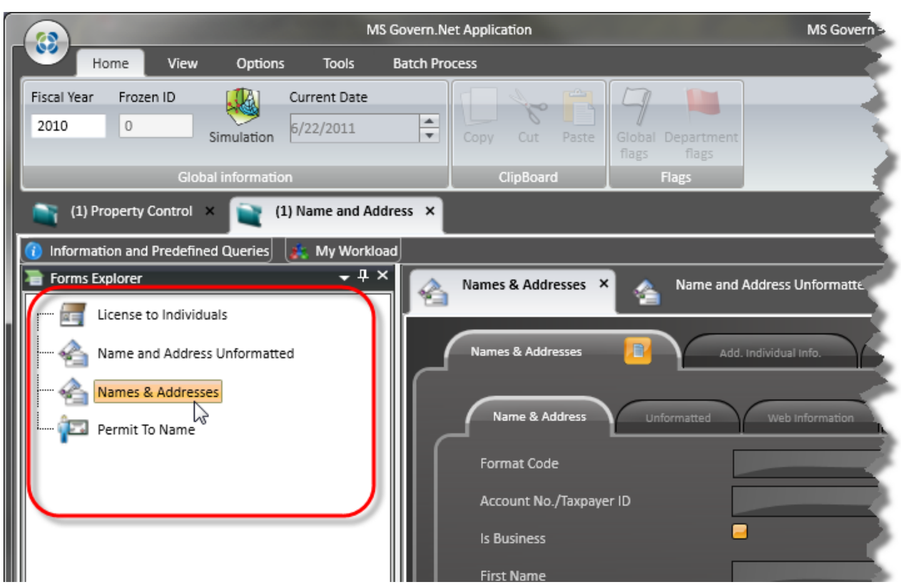
Overview

The *Names & Addresses* OpenForm is used for creating and maintaining name and address records. This form is central to *Govern*, as these records are accessed by all the subsystems. This centralization reduces repetitive data entry. Change of address and other modifications need to be entered only once. All names, including owners, occupants, contractors, appraisers and inspectors are saved in the same name table. However, you can keep records private to your department, or to a name sharing group between departments. In addition, you can set three levels of security for name records. *Refer to the Department Setup section of the Super User guide for details*.

To ensure that your addresses are formatted correctly, you can select a country code, you can also apply a customized field mask to standardize telephone, fax, zip code and postal code formatting. *Refer to the Govern New Administration* (**GNA**) *Release 5.1 guide for details*.

To access this OpenForm, select a record and...

1. Double click **Names & Addresses** in the **Forms Explorer**.



In the *OpenForm* you will see the following tabs; each tab is used to enter or maintain basic information, and any additional information for the **Name Type**:

- **Name & Address -** This will contain the base name and address information for the individual or the company.
- **Add. Individual Info. -** Use this tab to enter any *Additional Individual Information* that is pertinent to the individual. This can include Birth Date, and Social Insurance No.
- **Add. Company Info. -** When **Additional Company Information** is required, the fields under this tab should be completed; this can be Company Type, Tax No., etc.
- **Multimedia -** Under this tab, you can make any multimedia associations to the file. This can include letters, images, or any other documents that may be required or of value to the record.
- **Other Addresses -** Select this tab to see a list of secondary addresses that are associated with the record.

For details, see:

- *Names & Addresses - Individual on page 72*
- *Names & Addresses - Company on page 84*
- *Names & Addresses - No Format on page 94*
- *Multimedia on page 48*
- *Other Addresses tab on page 102*

Names & Addresses - Individual

Name & Address tab

Name & Address - Individual Parameters

Format Code: To define and maintain name and address records for companies, individuals, or no format, select one of the formats from the *Format Code* field (**A**) on the *Name & Address* form.

Note: Depending on the **Format Code** that is selected, the *OpenForm* will adjust to display the fields required for the code.

Do Not Display on the Web: This option is for organizations or citizens that are working in high risk occupations, or whose personal details can be considered as sensitive, e.g. Police officers, Judges, etc. For security purposes, when this option is selected, the record will not be displayed on the Web.

Account No. / Taxpayer ID: Enter the individual's account number. The first three digits are used for the Bank Branch ID.

Is Business: When this option is selected, the system will recognize the Name as a Business Type. When not selected, the name is used to specify the occupant, owner, etc.

Prefix: Select a prefix for the name, if applicable; for example, Dr., Mr, Ms etc. (Table: VT_USR_NAMEPRX).

Note: This field provides enough space for a title such as *The Honorable*.

First Name: Enter the first name.

Middle Name: Enter the middle initial or the full middle name.

Last Name: Enter the last name.

Suffix: Select a suffix for the name, if applicable (Table: VT_USR_NAMESFX).

Name Code: Select a name code from the drop-down list; for example, Trustee, In Trust, etc. (Table: VT_USR_NAMECODE).

Name 2: Use this line for any additional name information; for example, you can enter the spouse's name or extra address information.

Complete Address group

Address Line Before: Enter a text to be printed before the address line; for example, c/o *person's name*.

House No. Enter the civic number of the house.

Direction: Select a direction for the address, from the drop-down list; for example, 584a **E** Richcrest Drive (Table: VT_USR_STRDIR).

Street Name: Enter the street name.

> **Note:** If you are using Melissa Data address verification, addresses with P.O. box numbers are automatically formatted as follows:
>
> The P.O. box number is displayed in the **House No.** field and the text, *P.O. Box* appears in the **Street Name** field, even if you enter the number in the Street Name field.
>
> For example, if you enter *P.O Box 751* in the **Street Name** field, the system displays *751* in the **House No.** field and *P.O Box* in the **Street Name** field.

Street Suffix: Enter the street suffix from the drop-down list; for example, St., Blvd. or Dr. (Table: VT_USR_STRTYPE).

Direction: Select a direction for the address from the drop-down list; for example, 584a E Richcrest Drive **S** (Table: VT_USR_STRDIR).

Secondary Address Indicator: Select the secondary address indicator from the drop-down list; for example, suite, unit or floor (Table: VT_USR_SECADD).

Unit: Enter the unit number.

Address Line After: Enter text to be printed after the address, if applicable.

City: Enter the city name.

Zip / Postal Code: Enter the zip code or postal code.

State: Select the state or province (Table: VT_USR_STATE).

Country: The validation table, VT_SY_CTRIES, now includes all country names. Select a country.

> **Tip:** Set up a default value for the Country parameter; if most of your addresses are in the same country, so that you will not need to enter it each time.

Country Address Format: Select a country code from the drop-down list (Table: VT_SY_MAILFMT). The country code formats the mailing information, according to the standards of the country from which the mail is sent. On the *System Registry Maintenance* form, this code sets the default. The user can override the default on the *Name and Address Maintenance* function in Govern, for the current record.

*To set up a default value for the Country Attribute refer to the Govern Business Entity Designer (**BED**) user guide.*

Privacy / Restrictions

In *Govern*, privacy / restriction designations are set when the record is created. Once set, privacy / restriction settings are permanent, i.e. the privacy designation can never be modified again. For example, if a user for the "Building Department" creates a name and address record, that record takes on any restrictions that are set on the group. If no restrictions are set, then that record will always be permanently visible, i.e. will appear in all searches regardless of security restrictions.

When a new record is created with no group or security settings, a *Super User* can return to the record and set it at a later time. This now means that any department can create a new record; a second process can occur wherein a *Super User* would then set required *Group Codes* and *Security* restrictions.

Note: Once the Group Code and Security restrictions have been set and saved, they can no longer be modified for the record.

Privacy / Restrictions group

Group Code: This field displays the code of the *Name Sharing Group* that created the records. A *Name Sharing Group* is used to provide full access rights to the name and address records, created by one department, to one or more of the other departments, within an organization.

Levels of Security

There are three (3) levels of security for *Name and Address* records.

Private: Selecting this option means that the name and address records, are private to the department or *Name Sharing Group*, where they were created. Other users are not able to search for these names, modify them or delete them. They can only view them on the Govern functions.

Restricted Name Only: If this option is selected, the *Names* in the name and address records are restricted to the department or *Name Sharing Group*, where they were created. Other users can view the names but not modify them or delete them. They can, however, search for the records and modify the addresses.

Restricted Names & Address: When selected, both the name and address portions, of the name and address records, are restricted to the department or *Name Sharing Group* where they were created. This option is similar to the **Private Names** option, with the exception that other users can perform a search for these records. However, they cannot modify or delete them.

Note: Only users with Full Access Rights to the Names & Address function will be able to modify the First Name & Last Name, Company Name or Free Line 1 parameters.

Residential or Business (Melissa): If you have subscribed to MelissaDATA's *Residential Business Delivery Indicator* (**RBDI**) add-on with your existing *Melissa Address Verification* service, this field will indicate whether the address is a Residential or Business.

Note: The MelissaDATA service is a paid subscription, when not enabled, this field is hidden.

Intelligent Mail Barcode

The Intelligent Mail barcode (formerly known as the 4-State Customer Barcode) is used to sort and track letters. Barcode formats that are supported are IMB_31 and IMB_65

IMB 31: When using IMB_31 enter the code in this parameter.

IMB 65: Enter the IMB_65 code in this parameter if you are using IMB_65.

Unformatted tab

Name & Address: Enter information in these parameters for unformatted addresses.

Web Information tab

E-Mail: Enter a contact e-mail address that is associated with the account.

eProfile Access: This field will indicate if the name record has eProfile access.

Access Level: Select an Access Level for the user. Access Levels are defined for each menu option, on the *eProfile* Web User Interface. You need to assign an Access Level to the user. The user can access the corresponding menu options, only:

- **Internet Without Profile:** This level is not applicable in this context. It is used to grant access to unauthenticated or anonymous users, for a menu option.
- **Internet With Profile:** This level is typically assigned to users who log in with an account ID and password.
- **Internet Subscriber:** This level is assigned to professional users, who log on through paid access. Typically, menu options that provide access for viewing additional properties and accounts are assigned this level. When, you select this level, the user's name is automatically added to the list of subscribers waiting to be signed up to a plan.
- **Intranet User:** This level is assigned to your intranet users.
- **Intranet Admin:** This level is assigned to administrators. Typically, menu options in the *Administration* menu are defined as *Intranet Admin* access.

Note: By default, users are assigned the Internet With Profile Access Level.

Note: You need to have Full Access Rights to the function, in order to access this text box. *Refer to the eGovern - Public User Self Service guide for details on access rights.*

Post Office Mailing Info. tab

The following fields have been added for displaying presort information for outgoing mail. Typically, these fields are populated through the *Mail 4+ Import* process. However, you can modify them directly on this function, if required.

Distribution Sequence: This field displays a code used to presort mail in the order it is to be delivered.

Carrier Route Number: This field displays a code used to presort mail in the order it is delivered by the mail carrier along a route.

Delivery Point: This field displays a three digit number comprised of two numbers and a *correction digit*. These numbers, with the nine digit ZIP+4 code, make up the *Delivery Point Barcode* and are required in certain mailing types.

Container Number: This field displays a number identifying the container for the mail.

Package Number: All items with the same package number need to be bundled together. Then, the bundles need to be delivered to the post office, in order of package number.

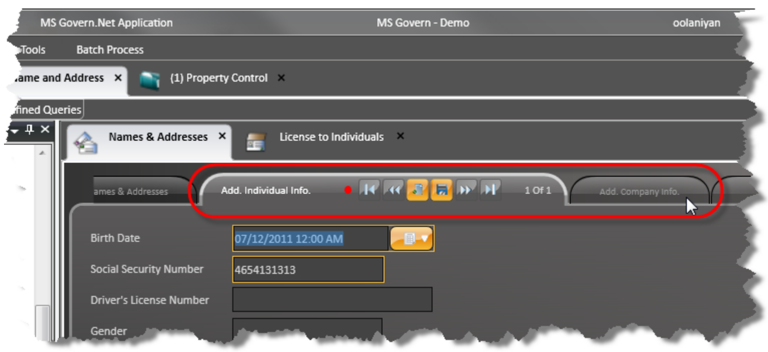
PostNET Code: POSTNET or *Postal Numeric Encoding Technique* is a barcode system used by the US Postal Service to aid the direction of mail. Enter the POSTNET code if available.

Add. Individual Info. tab

The *Additional Individual Information* tab is used for adding extra details, such as a birth date, an evening telephone number; fax number, or e-mail address, to a name and address record.

Click the tab to create an *Additional Individual Information* record:

1. Click **New** on the **Add. Individual Info.** tab.
2. Enter the required information into the available fields, i.e. birthdate, SSN, Drivers License number, etc.



3. Click **Save** to save the record.

For details on using the Additional Name Information function for a company, see the Add. Individual Info. tab on page 79 and Add. Company Info. tab on page 90.

Tip: Standardize the formatting of your name and address data by applying field masks. *Refer to the Global Mask Validation Editor in the Govern New Administration* (**GNA**) *guide for details*.

Birth Date: Enter the date of birth of the individual.

Social Security Number: Enter the Social Security Number of the individual. This number is encrypted in the database.

Driver's License Number: Enter the driver's license number.

Gender: Select Male or Female.

Telephone (Day): Enter the daytime, or business, telephone number of the individual.

Telephone (Night): Enter the evening, or home, telephone number of the individual.

E-mail Address: Enter the e-mail address of the individual. This is used by the messaging system in the Govern's *Permits and Inspections* module.

Notes: This field provides unlimited space for notes and comments.

Fax Number: Enter the Fax number.

Web Hit Counter: Enter a initialization number that will be used for the Web hit counter. Any subsequent hits will be increased by one.

Add Social Security Number (SSN) for Name 2

Properties can have multiple owners; for example a husband and wife, or business partners, may be listed as the owners of a property. In such instances, the co-owner is typically entered in the *Name 2* parameter. Prior to Govern 10.5, the SSN could only be entered for the primary Name parameter. You can include a social security number for the name entered in the **Additional Individual Information** form.

To add a *SSN* for the *Name 2* parameter...

1. Select a department; and open a parcel.
2. Select the *Name & Address Maintenance* function from the *Dataset Treeview*.
3. In the *Name & Address Maintenance* form, click the **Add. Individual Info.** tab to display the *Additional Individual Information* form fields.

4. Enter a SSN in the *Name 2 Social Security Number* parameter.

With a *Social Security Number* (**SSN**) entered for a second person, your search is enhanced; when required, you are able to query the system with the social security number of an additional person, thereby improving your chances of locating the target parcel.

Other Addresses tab

Note: This tab can be completed for records created in any of the three (3) format codes, *Company*, *Individual*, or *No Format*.

Govern supports multiple addresses linked to a unique *Name and Address* record.

Entering Secondary Addresses

Secondary addresses are kept in a the NA_LK_NAME_ADDRESS.

To enter secondary addresses:

1. Click the **Other Addresses** tab.

   The principal address is listed under the **Name & Address** tab. The secondary addresses are listed under this tab.

2. Click **New** to add a secondary address.
3. Enter the following information:
   - **House Number**. Enter the house number.
   - **Direction**: Select the pre-direction, if applicable.
   - **Street Name**: Enter the street name.
   - **Street Suffix**: Select the street suffix.
   - **Direction**: Select the street direction.

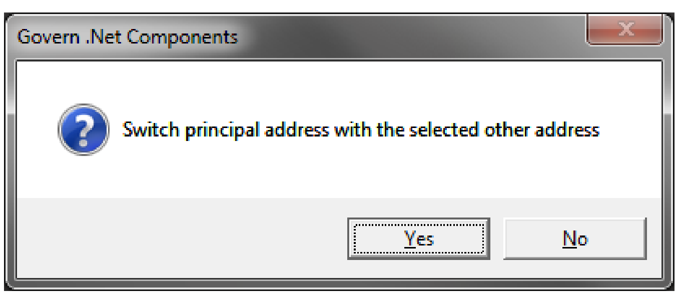
- **Secondary Address Indicator**: Select the address indicator, such as suite, apartment or unit.
- **Unit**: Enter the Secondary Address Indicator number, letter or name.
- **Address Line Before**: Enter the additional information that precedes the address such as c/o, if applicable.
- **Address Line After**: Enter the additional information that follows the address, if applicable.
- **City**: Enter the city.
- **Zip Postal**: Type the Zip code or Postal code.
- **State**: Enter the state or province.
- **Country**: Select the country.
- **Country Address Format**: Select the Country Format from the drop down list.
- **Free Lines 1 to 6**: Enter information in these parameters for unformatted addresses.

Switching Between Primary and Secondary Addresses

You can switch the address information between the primary set of fields in the NA_NAMES and one of the secondary addresses in NA_LK_NAME_ADDRESS table.

To switch addresses:

1. Select an address record from the **Other Addresses** grid.
2. Click **Switch Address**.
3. The following screen will appear; click **Yes** to confirm the switch.



Names & Addresses - Company

Name & Address tab

Names & Addresses - Company parameters

Format Code: To define and maintain name and address records for companies, individuals, or no format, select one of the formats from the *Format Code* field (**A**) on the *Name & Address* form.

Note: Depending on the **Format Code** that is selected, the *OpenForm* will adjust to display the fields required for the code.

Select **Company** in the *Format Code* drop down menu of the *Name & Address* tab; fill in the required parameters.

Do Not Display on the Web: This option is for organizations or citizens that are working in high risk occupations, or whose personal details can be considered as sensitive, e.g. Police officers, Judges, etc. For security purposes, when this option is selected, the record will not be displayed on the Web.

Account No. / Taxpayer ID: Enter the company's account number or Taxpayer ID. For account number, the first three digits represent the bank branch.

Company / Business Name: Enter the company name.

Is Business: When this option is selected, the system will recognize the Name as a Business Type. When not selected, the name is used to specify the occupant, owner, etc.

Name 2: Use this line for any additional information; for example, you can enter extra address or business name information.

Complete Address group

Address Line Before: Enter text to be printed before the address line, if applicable; for example, c/o *person's name*.

House No. Enter the company's civic number.

Direction: Select a Direction for the Address, from the drop-down list; for example, 650 **E** Main St. NE) (Table: VT_USR_STRDIR)

Street Name: Enter the street name.

> **Note:** If you are using Melissa Data address verification, addresses with P.O. box numbers are automatically formatted as follows:
>
> The P.O. box number is displayed in the **House No.** field and the text, *P.O. Box* appears in the **Street Name** field, even if you enter the number in the Street Name field.
>
> For example, if you enter *P.O Box 751* in the **Street Name** field, the system displays *751* in the **House No.** field and *P.O Box* in the **Street Name** field.

Street Suffix: Enter the Street Suffix from the drop-down list; for example, St., Blvd. or Dr.) (Table: VT_USR_STRTYPE).

Direction: Select a direction for the address, from the drop-down list; for example, 650 E Main St. **NE** (Table: VT_USR_STRDIR).

Secondary Address Indicator: Enter the Secondary Address Indicator from the drop-down list; for example, Suite, Unit (Table: VT_USR_SECADD).

Unit: Enter the unit number.

Address Line After: Enter text to be printed before the address line, if applicable.

City: Enter the name of the city.

Zip / Postal Code: Enter the zip code or postal code.

State: Select the state or province (Table: VT_USR_STATE).

Country: Enter the country name.

Country Address Format: Select a Country Address Format to determine the format for the printing of the address (Table: VT_SY_MAILFMT).

Privacy and Restrictions

In *Govern*, privacy / restriction designations are set when the record is created. Once set, privacy / restriction settings are permanent, i.e. the privacy designation can never be modified again. For example, if a user for the “Building Department” creates a name and address record, that record takes on any restrictions that are set on the group. If no restrictions are set, then that record will always be permanently visible, i.e. will appear in all searches regardless of security restrictions.

When a new record is created with no group or security settings, a *Super User* can return to the record and set it at a later time. This now means that any department can create a new record; a second process can occur wherein a *Super User* would then set required *Group Codes* and *Security* restrictions.

> **Note:** Once the Group Code and Security restrictions have been set and saved, they can no longer be modified for the record.

Privacy / Restrictions group

Group Code: This field displays the code of the *Name Sharing Group* that created the records. A *Name Sharing Group* is used to provide full access rights to the name and address records, created by one department, to one or more of the other departments, within an organization.

There are now three (3) levels of security for *Name and Address* records.

Private: Selecting this option means that the name and address records, are private to the department or *Name Sharing Group*, where they were created. Other users are not able to search for these names, modify them or delete them. They can only view them on the Govern functions.

Restricted Names & Address: When selected, both the name and address portions, of the name and address records, are restricted to the department or *Name Sharing Group* where they were created. This option is similar to the **Private Names** option, with the exception that other users can perform a search for these records. However, they cannot modify or delete them.

Note: Only users with Full Access Rights to the Names & Address function will be able to modify the First Name & Last Name, Company Name or Free Line 1 parameters.

Restricted Name Only: If this option is selected, the *Names* in the name and address records are restricted to the department or *Name Sharing Group*, where they were created. Other users can view the names but not modify them or delete them. They can, however, search for the records and modify the addresses.

Residential or Business (Melissa): If you have subscribed to MelissaDATA's *Residential Business Delivery Indicator* (**RBDI**) add-on with your existing *Melissa Address Verification* service, this field will indicate whether the address is a Residential or Business.

Note: The MelissaDATA service is a paid subscription, when not eneabled, this field is hidden.

Intelligent Mail Barcode

The Intelligent Mail barcode (formerly known as the 4-State Customer Barcode) is used to sort and track letters. Barcode formats that are supported are IMB_31 and IMB_65

IMB 31: When using IMB_31 enter the code in this parameter.

IMB 65: Enter the IMB_65 code in this parameter if you are using IMB_65.

Unformatted tab

Name & Address: Enter information in these parameters for unformatted addresses.

Names & Addresses - Web Information tab

For users of the *eGovern - Public Self Service Portal*, the following parameters are required for the *eProfile*. *Refer to the eGovern - Public Self Service Portal guide for details about the eProfile*.

This Web Information tab will contain information that is charateristically displayed on the Web. Included fields are...

E-mail: Enter the contact e-mail address that is to be used for this name record.

eProfile Access: This field will indicate if the name record has eProfile access.

Access Level: Select an *Access Level* for the user. Access Levels are defined for each menu option, on the eProfile Web User Interface. You need to assign an Access Level to the user. The user can access the corresponding menu options, only:

- **Internet Without Profile**: This level is not applicable in this context. It is used to grant access to unauthenticated or anonymous users, for a menu option.
- **Internet With Profile**: This level is typically assigned to users who log in with an account ID and password.
- **Internet Subscriber**: This level is assigned to professional users, who log on through paid access. Typically, menu options that provide access for viewing additional properties and accounts are assigned this level. When, you select this level, the user's name is automatically added to the list of subscribers waiting to be signed up to a plan.
- **Intranet User**. This level is assigned to your intranet users.
- **Intranet Admin**. This level is assigned to administrators. Typically, menu options in the **Administration** menu are defined as **Intranet Admin** access.

Note: By default, users are assigned the **Internet With Profile** *Access Level*.

Note: You need to have *Full Access Rights* to the function, in order to access this text box. *Refer to the eGovern - Public User Self Service guide for details on access rights.*

Post Office Mailing Info. tab

The following fields display presort information for outgoing mail. Typically, these fields are populated through the *Mail 4+ Import* process. However, you can modify them directly under this tab, if required.

Distribution Sequence: This field displays a code used to presort mail in the order it is to be delivered.

Carrier Route Number: This field displays a code used to presort mail in the order it is delivered by the mail carrier along a route.

Delivery Point: This field displays a three digit number comprised of two numbers and a *correction digit*. These numbers, with the nine digit ZIP+4 code, make up the *Delivery Point Barcode* and are required in certain mailing types.

Container Number: This field displays a number identifying the container for the mail.

Package Number: All items with the same package number need to be bundled together. Then, the bundles need to be delivered to the post office, in order of package number.

PostNET Code: POSTNET or *Postal Numeric Encoding Technique* is a barcode system used by the US Postal Service to aid the direction of mail. Enter the POSTNET code if available.

Add. Company Info. tab

The *Additional Company Information* form is used for adding information, such as Federal ID, Federal Tax Number or a Contact Name to an existing company record.

To access this form, open a name record and:

1. Click **New** on the **Add. Company Info.** tab.
2. Enter the required information into the available fields, i.e. Federal ID No., Federal Tax No., Company Type, etc.
3. Click **Save** to save the record.

Add. Company Info. parameters

Tip: Standardize the formatting of your name and address data by applying field masks. *Refer to the Super User guide for details*.

Federal ID No. Enter the Company's Federal ID Number. This field is encrypted in the database.

Federal Tax No. Enter the company's federal tax number. This field is encrypted in the database.

Telephone: Enter the company's telephone number.

Fax Number: Enter the company's fax number.

E-Mail Address: Enter the Company's e-mail address. This is used by the Govern Messaging function in the *Permits and Inspections* sub-system.

Contact Name: Enter a contact name for the company.

Company Type: Enter a company type.

License No.: Enter the company's license number.

License Expiration: Enter the last date the company's license is valid. If the name is linked to a permit, the expiration date is displayed on the **Names** tab of the *Permit Creation* form. *Refer to the Permit & Inspections guide for details*.

State Tax No. Enter the company's state tax number.

Internet Web Site: Enter the company's Web site address.

Insurance Information: Enter the company's insurance information, e.g. policy number.

Bond Information: Enter any relevant Bond Information.

Notes: This field provides unlimited space for notes and comments.

Accounts / Receivable for Permits Issued: Select this option to create a link to Govern's Accounts Receivable subsystem for any permit or license issued to the current company name.

The following parameters are required for the eProfile. *Refer to eProfile guide for details*.

Other Addresses tab

Note: This tab can be completed for records created in any of the three (3) format codes, *Company*, *Individual*, or *No Format*.

Govern supports multiple addresses linked to a unique *Name and Address* record.

Entering Secondary Addresses

Secondary addresses are kept in a the NA_LK_NAME_ADDRESS.

To enter secondary addresses:

1. Click the **Other Addresses** tab.

   The principal address is listed under the **Name & Address** tab. The secondary addresses are listed under this tab.

2. Click **New** to add a secondary address.
3. Enter the following information:
   - **Address Line Before**: Enter the additional information that precedes the address such as c/o, if applicable.
   - **House Number**. Enter the house number.
   - **Direction**: Select the pre-direction, if applicable.
   - **Street Name**: Enter the street name.

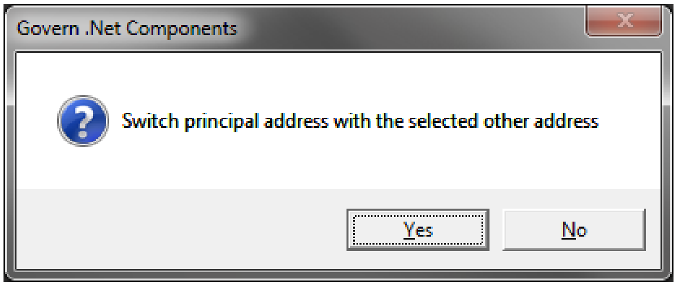
- **Street Suffix**: Select the street suffix.
- **Direction**: Select the street direction.
- **Secondary Address Indicator**: Select the address indicator, such as suite, apartment or unit.
- **Unit**: Enter the Secondary Address Indicator number, letter or name.
- **Address Line After**: Enter the additional information that follows the address, if applicable.
- **City**: Enter the city.
- **Zip Postal**: Type the Zip code or Postal code.
- **State**: Enter the state or province.
- **Country**: Select the country.
- **Country Format**: Select the Country Format from the drop down list.
- **Free Lines 1 to 6**: Enter information in these parameters for unformatted addresses.

Switching Between Primary and Secondary Addresses

You can switch the address information between the primary set of fields in the NA_NAMES and one of the secondary addresses in NA_LK_NAME_ADDRESS table.

To switch addresses:

1. Select an address record from the **Other Addresses** grid.
2. In the *Other Addresses* tab click **Switch Address**.
3. The following screen will appear; click **Yes** to confirm the switch, or **No** to cancel.



Names & Addresses - No Format

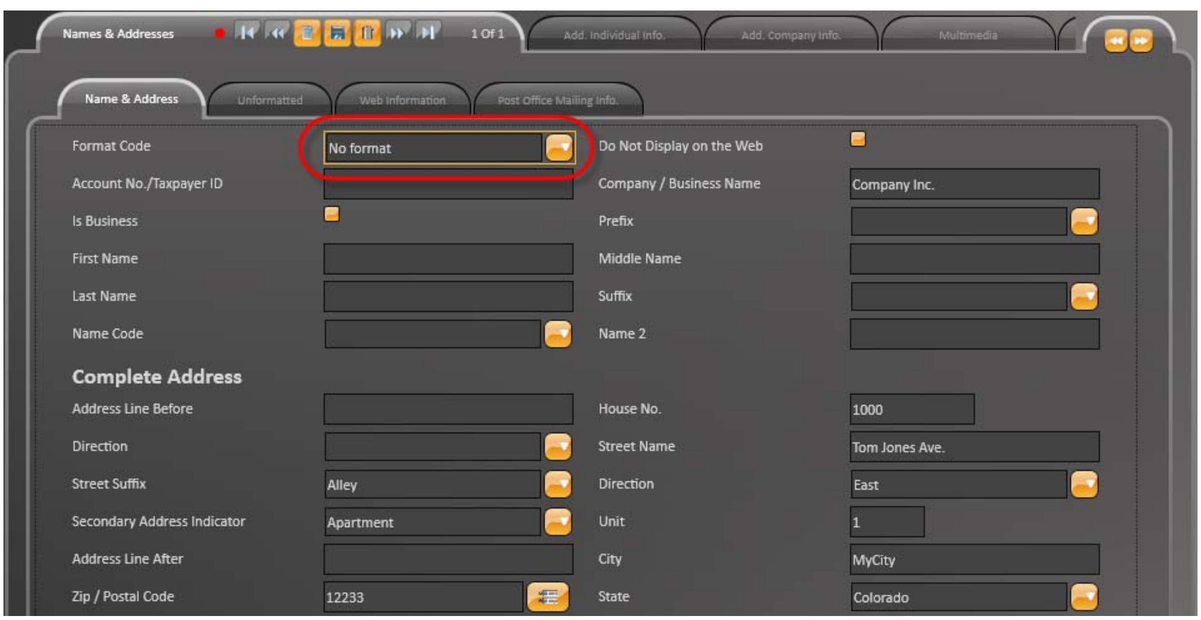
Name & Address tab

Names & Addresses - No Format parameters

Format Code: To define and maintain name and address records for companies, individuals, or no format, select one of the formats from the *Format Code* field (**A**) on the *Name & Address* form.

Note: Depending on the **Format Code** that is selected, the *OpenForm* will adjust to display the fields required for the code.

Select **No Format** from the **Format Code** drop down menu; fill in the required information.



Do Not Display on the Web: This option is for organizations or citizens that are working in high risk occupations, or whose personal details can be considered as sensitive, e.g. Police officers, Judges, etc. For security purposes, when this option is selected, the record will not be displayed on the Web.

Account No. / Taxpayer ID: Enter the company's account number or Taxpayer ID. For account number, the first three digits represent the bank branch.

Complete Address group

Address Line Before: Enter text to be printed before the address line, if applicable; for example, c/o *person's name*.

House No. Enter the company's civic number.

Direction: Select a Direction for the Address, from the drop-down list; for example, 650 **E** Main St. NE) (Table: VT_USR_STRDIR)

Street Name: Enter the street name.

> **Note:** If you are using Melissa Data address verification, addresses with P.O. box numbers are automatically formatted as follows:
>
> The P.O. box number is displayed in the **House No.** field and the text, *P.O. Box* appears in the **Street Name** field, even if you enter the number in the Street Name field.
>
> For example, if you enter *P.O Box 751* in the **Street Name** field, the system displays *751* in the **House No.** field and *P.O Box* in the **Street Name** field.

Street Suffix: Enter the Street Suffix from the drop-down list; for example, St., Blvd. or Dr.) (Table: VT_USR_STRTYPE).

Direction: Select a direction for the address, from the drop-down list; for example, 650 E Main St. **NE** (Table: VT_USR_STRDIR).

Secondary Address Indicator: Enter the Secondary Address Indicator from the drop-down list; for example, Suite, Unit (Table: VT_USR_SECADD).

Unit: Enter the unit number.

Address Line After: Enter text to be printed before the address line, if applicable.

City: Enter the name of the city.

Zip / Postal Code: Enter the zip code or postal code.

State: Select the state or province (Table: VT_USR_STATE).

Country: Enter the country name.

Country Address Format: Select a Country Address Format to determine the format for the printing of the address (Table: VT_SY_MAILFMT).

Privacy / Restrictions group

In *Govern*, privacy / restriction designations are set when the record is created. Once set, privacy / restriction settings are permanent, i.e. the privacy designation can never be modified again. For example, if a user for the "Building Department" creates a name and address record, that record takes on any restrictions that are set on the group. If no restrictions are set, then that record will always be permanently visible, i.e. will appear in all searches regardless of security restrictions.

When a new record is created with no group or security settings, a *Super User* can return to the record and set it at a later time. This now means that any department can create a new record; a second process can occur wherein a *Super User* would then set required *Group Codes* and *Security* restrictions.

Note: Once the Group Code and Security restrictions have been set and saved, they can no longer be modified for the record.

Privacy / Restrictions group

Group Code: This field displays the code of the *Name Sharing Group* that created the records. A *Name Sharing Group* is used to provide full access rights to the name and address records, created by one department, to one or more of the other departments, within an organization.

There are now three (3) levels of security for *Name and Address* records.

Private: Selecting this option means that the name and address records, are private to the department or *Name Sharing Group*, where they were created. Other users are not able to search for these names, modify them or delete them. They can only view them on the Govern functions.

Restricted Names & Address: When selected, both the name and address portions, of the name and address records, are restricted to the department or *Name Sharing Group* where they were created. This option is similar to the **Private Names** option, with the exception that other users can perform a search for these records. However, they cannot modify or delete them.

Note: Only users with Full Access Rights to the Names & Address function will be able to modify the First Name & Last Name, Company Name or Free Line 1 parameters.

Restricted Name Only: If this option is selected, the *Names* in the name and address records are restricted to the department or *Name Sharing Group*, where they were created. Other users can view the names but not modify them or delete them. They can, however, search for the records and modify the addresses.

Residential or Business (Melissa): If you have subscribed to MelissaDATA's *Residential Business Delivery Indicator* (**RBDI**) add-on with your existing *Melissa Address Verification* service, this field will indicate whether the address is a Residential or Business.

Note: The MelissaDATA service is a paid subscription, when not enabled, this field is hidden.

Intelligent Mail Barcode

The Intelligent Mail barcode (formerly known as the 4-State Customer Barcode) is used to sort and track letters. Barcode formats that are supported are IMB_31 and IMB_65

IMB 31: When using IMB_31 enter the code in this parameter.

IMB 65: Enter the IMB_65 code in this parameter if you are using IMB_65.

Unformatted Tab

Name & Address: Enter information in these parameters for unformatted addresses.

Post Office Mailing Information tab

The following fields display presort information for outgoing mail. Typically, these fields are populated through the *Mail 4+ Import* process. However, you can modify them directly on this function, if required.

Distribution Sequence: This field displays a code used to presort mail in the order it is to be delivered.

Carrier Route Number: This field displays a code used to presort mail in the order it is delivered by the mail carrier along a route.

Delivery Point: This field displays a three digit number comprised of two numbers and a *correction digit*. These numbers, with the nine digit ZIP+4 code, make up the *Delivery Point Barcode* and are required in certain mailing types.

Container Number: This field displays a number identifying the container for the mail.

Package Number: All items with the same package number need to be bundled together. Then, the bundles need to be delivered to the post office, in order of package number.

PostNET Code: PostNET or *Postal Numeric Encoding Technique* is a barcode system used by the US Postal Service to aid the direction of mail. Enter the PostNET code if available.

Other Addresses

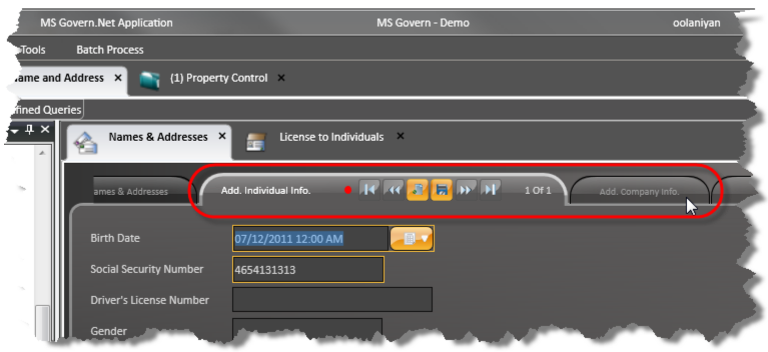
Govern supports multiple addresses linked to a unique *Name and Address* record. *See Other Addresses tab on page 102*

Additional Individual Info. tab

The *Additional Individual Information* tab is used for adding extra details, such as a birth date, an evening telephone number; fax number, or e-mail address, to a name and address record.

Click the tab to create an *Additional Individual Information* record:

1. Click **New** on the **Add. Individual Info.** tab.
2. Enter the required information into the available fields, i.e. birthdate, SSN, Drivers License number, etc.



3. Click **Save** to save the record.

For details on the using the Additional Name Information function for a company, see Additional Individual Info. tab on page 99 and Add. Company Info. tab on page 90.

Tip: Standardize the formatting of your name and address data by applying field masks. *Refer to the Global Mask Validation Editor in the Govern New Administration* (**GNA**) *guide for details*.

Birth Date: Enter the date of birth of the individual.

Social Security Number: Enter the Social Security Number of the individual. This number is encrypted in the database.

Driver's License Number: Enter the driver's license number.

FAX Number: Enter the Fax number.

Add Social Security Number (SSN) for Name 2

Properties can have multiple owners; for example a husband and wife, or business partners, may be listed as the owners of a property. In such instances, the co-owner is typically entered in the *Name 2* parameter. Prior to Govern 10.5, the SSN could only be entered for the primary Name parameter. You can include a social security number for the name entered in the **Additional Individual Information** form.

To add a *SSN* for *Name 2* parameter...

1. Select a department; and open a parcel.
2. Select the *Maintenance* function from the *Dataset Treeview*.

3. In the *Maintenance* form, click the **Add. Individual Info.** tab to display the *Additional Individual Information* form fields.

4. Enter a SSN in the *Name 2 Social Security Number* parameter.

With a *Social Security Number* (**SSN**) entered for a second person, your search is enhanced; when required, you are able to query the system with the social security number of an additional person, thereby improving your chances of locating the target parcel.

Gender: Select Male or Female.

Telephone (Day): Enter the daytime, or business, telephone number of the individual.

Telephone (Night): Enter the evening, or home, telephone number of the individual.

E-mail Address: Enter the e-mail address of the individual. This is used by the messaging system in the Govern's *Permits and Inspections* module.

Notes: This field provides unlimited space for notes and comments.

Fax Number: Enter the Fax contact number.

Web Hit Counter: Enter a initialization number that will be used for the Web hit counter. Any subsequent hits will be increased by one.

Other Addresses tab

Note: This tab can be completed for records created in any of the three (3) format codes, *Company*, *Individual*, or *No Format*.

Govern supports multiple addresses linked to a unique *Name and Address* record.

Entering Secondary Addresses

Secondary addresses are kept in a the NA_LK_NAME_ADDRESS.

To enter secondary addresses:

1. Click the **Other Addresses** tab.

The principal address is listed under the tab. The secondary addresses are listed under this tab.

2. Click **New** to add a secondary address.
3. Enter the following information:
   - **House Number**. Enter the house number.

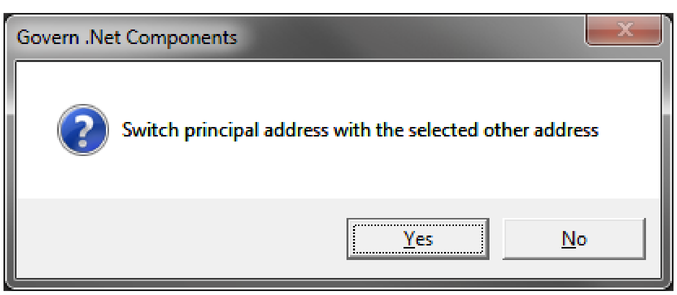
- **Direction**: Select the pre-direction, if applicable.
- **Street Name**: Enter the street name.
- **Street Suffix**: Select the street suffix.
- **Direction**: Select the street direction.
- **Secondary Address Indicator**: Select the address indicator, such as suite, apartment or unit.
- **Unit**: Enter the Secondary Address Indicator number, letter or name.
- **Address Line Before**: Enter the additional information that precedes the address such as c/o, if applicable.
- **Address Line After**: Enter the additional information that follows the address, if applicable.
- **City**: Enter the city.
- **Zip Postal**: Type the Zip code or Postal code.
- **State**: Enter the state or province.
- **Country**: Select the country.
- **Country Address Format**: Select the Country Format from the drop down list.
- **Free Lines 1 to 6**: Enter information in these parameters for unformatted addresses.

Switching Between Primary and Secondary Addresses

You can switch the address information between the primary set of fields in the NA_NAMES and one of the secondary addresses in NA_LK_NAME_ADDRESS table.

To switch addresses:

1. Select an address record from the **Other Addresses** grid.
2. Click **Switch Address**.
3. The following screen will appear; click **Yes** to confirm the switch.



Name Linking

Overview

The *Name Linking OpenForm* is used for linking names to a record with an identifier. The *Name Linking OpenForm* is composed of two tabs, a *Name Link Summary* tab, and a tab for *Linked Names*.

To access this form...

1. In the *Profile*, in the Forms Explorer double-click on the *Name Linking OpenForm*.
2. Use the *Search* to open a record.

Name Link Summary tab Command buttons

Creating a New Name Link Record: Click **New** to create a new *Name Link* record.

Saving a New Name Link Record: Click **Save** to save a new *Name Link* record or any modifications done on an existing one.

Deleting a Name Link Record: Click **Delete** to remove the current record from the Database.

Browsing Name Link Records: Click **Browse** to view existing Name link records.

Name Link Summary tab parameters

Name & Address: This field will contain the name and address information of the current selected record.

Link Type: Select a value from the drop-down list to define the relationship of the Name. Examples of *Link Types* are *Tenant*, *Proprietor*, *Developer*, etc. (Table & Column: NA_NAMES_LK_TYPE.LINK_TYPE)

Name Type: Select this option to specify a name type. Examples of Name Types are *Applicants*, *Primary Contacts*, *Owners*, etc.
(Table & Column: NA_NAMES_LINKS.NAME_TYPE)

From Date: Enter the date that the link will be effective from. (Table & Column: NA_NAMES_LINKS.FROM_DATE)

To Date: Specify the date that the link will no longer be effective after. (Table & Column: NA_NAMES_LINKS.TO_DATE)

Linked Names tab Command buttons

Adding a New Name Link Record: Click **Add Name Link** to add a new *Name.*

Saving a New Name Link Record: Click **Save** to save the *Name Link*.

Deleting a Name Link Record: Click the linked record to highlight it; click **Delete** to remove the current record from the Database.

Setting a Master Name: When a link record has been created, but no Names have been linked, by default the current Name is defined as the Master Name. To change this information, click in the field and click **Set As Master Name**. When the Name has been established as the *Master Name*, **-1** is displayed under the *Master Name* column in the grid.

Sending the Name to the Treeview: Highlight a linked Name in the grid and click **Send Name to Treeview** to make it a part of the dataset in the treeview.

Linked Names tab column headings

Master Name: When a parcel is designated as a Master Parcel, it can have its link information modified. When a link record is created, by default the current parcel is defined as the *Master Parcel* and **-1** is displayed in this field. *See*.
(Table & Column: NA_NAMES_LINKS.MASTER_NA_ID)

Name & Address: This field displays the name and address information of the name linked in the current record.

Name Type: This field displays the, when it exists, the name type.

Inactive Year: This field displays the year that the link becomes inactive. By default, this is 9999. To change this value, enter an alternate year.

From Date: This is the date that the link will be effective from.

End Date: This column displays the date that the link will no longer be effective after.

Creating a Name Linking Record

To create a new *Name Linking* record...

1. Open the *Name Linking OpenForm*.
2. Search for a Name.
3. Click **New** on the *Name Link Summary* tab.
4. Select a *Link Type*; complete the required parameters.
5. Click **Save**.

A new Name linking record has been created in the system.

Modifying an Existing Name Linking Record

To modify an existing *Name Linking* record...

1. On the *Name Link Summary* tab verify the record being modified.
2. Modify any of the required fields.
3. Click **Save** to save your changes.

Deleting an Existing Name Linking Record

Note: In order to delete a record, ensure that there are no links to the record other than the *Master Parcel*.

To delete an existing Name linking record...

1. On the *Name Link Summary* tab verify the record being deleted.
2. Click **Delete** to delete the record.

3. At the confirmation screen, click **Yes**.

4. If the following screen is displayed, click **OK**; click the *Linked Names* tab and remove any linked Names.

Linking Additional Names to the Record

Click to select the *Linked Names* tab to create a link to a Name record...

1. Click **Add Name Link** on the *Linked Names* tab; this opens the *Search* screen.
2. Enter your search criteria on this screen and click **Search** to add an existing Name.
3. Complete any required parameters, i.e. *From Date*, *End Date*, etc.

The linked Name is now saved in the system.

Making a Linked Name the Master Name

When a linked Name is set as the *Master Name*, you can modify its link information under the *Name Link Summary* tab.

To make one of the linked Names the *Master Name*:

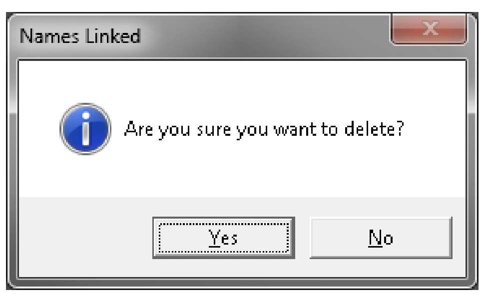
1. Select the Name in the list.
2. Click **Set As Master Name** on the *Linked Name* tab.
3. Click **Yes** to continue or **No** to return to the *Name Linking* form.

When the Name is set as the *Master Name*, its link information will be displayed under the *Name Link Summary* tab.

Removing a Link to a Name

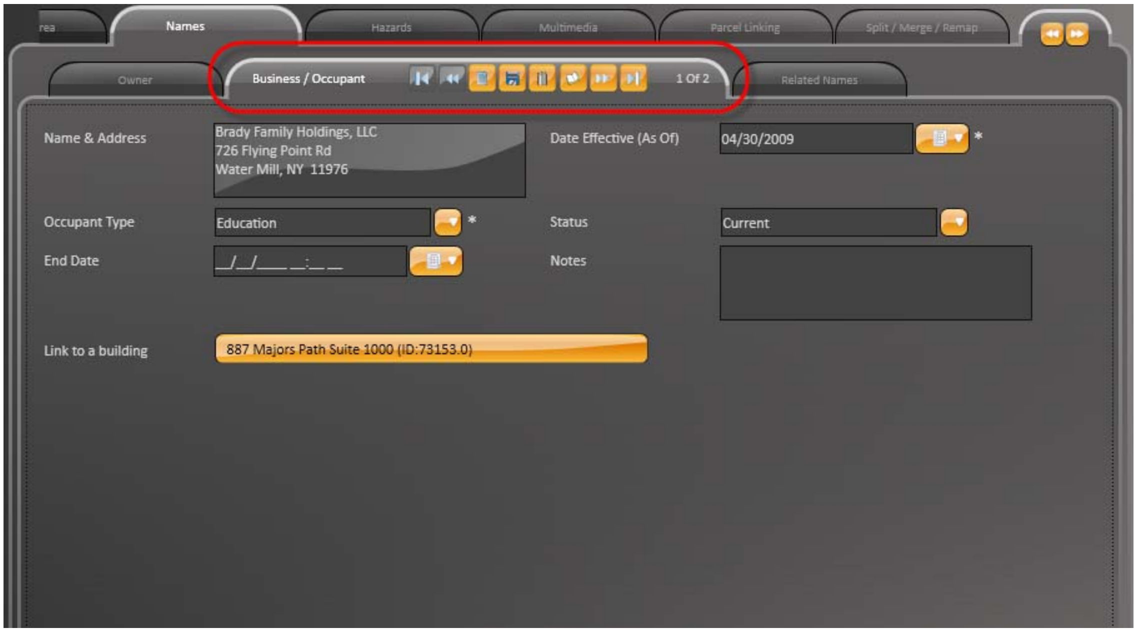
To remove a link to a Name:

1. Under the *Linked Name* tab, select a linked Name in the list.
2. Click **Delete**.
3. At the confirmation screen, click **Yes**.



The link to the Name will be deleted from the grid.

Business / Occupant



The *Business / Occupant* form is used for recording and maintaining data on the individual and business occupants of a property or building. The *Date Effective* field ensures that the correct occupant is listed on all reports and mailing indexes. The occupant type and status can also be recorded. Unlimited occupant records can be maintained for each property.

To access this form:

1. Open the *Property Control* profile.
2. Double-click the **Property Information** *OpenForm*.
3. Select the ***Names*** tab; click the **Business / Occupant** sub tab.
4. Open a record.

Creating and Modifying Business / Occupant info.

Creating a New Occupant Record: Click **New** to open the *Search* screen. Click **Search** to assign an existing name record to the current parcel.

Modifying Occupant Information: Click **Name** to open the *Name & Address Maintenance* form and make your modifications on this screen.

Date Effective (as of): Double-click in the field and select the *Date of Occupancy* from the pop-up calendar. This is the date the displayed person can claim occupancy of the property. This date is referenced by several departments and used in numerous reports.

Occupant Type: Select an **Occupant Type** from the drop-down list for this mandatory field (Table: VT_USR_OCCTYPE).

Status: Select one of the following options: **Current**, **Previous** or **Alternate Source**.

Note: If a property has only one Occupant and the information is loaded from an external system, such as tapes supplied by the county, the status then is **Alternate Source** even though the system handles the occupant as **Current**.

Notes: This field provides unlimited space for notes and comments.

Name & Address: This field displays the name and address of the occupant.

Note: This field cannot be modified directly on the screen. Make any changes through the *Name & Address Maintenance* form. See *Names & Addresses on page 70*.

Business Occupancy Assessment

The business assessment process is based upon an *Annual Rental Value* (**ARV**), where...

ARV = R + OC

R = Rent **OC** = Occupancy Costs

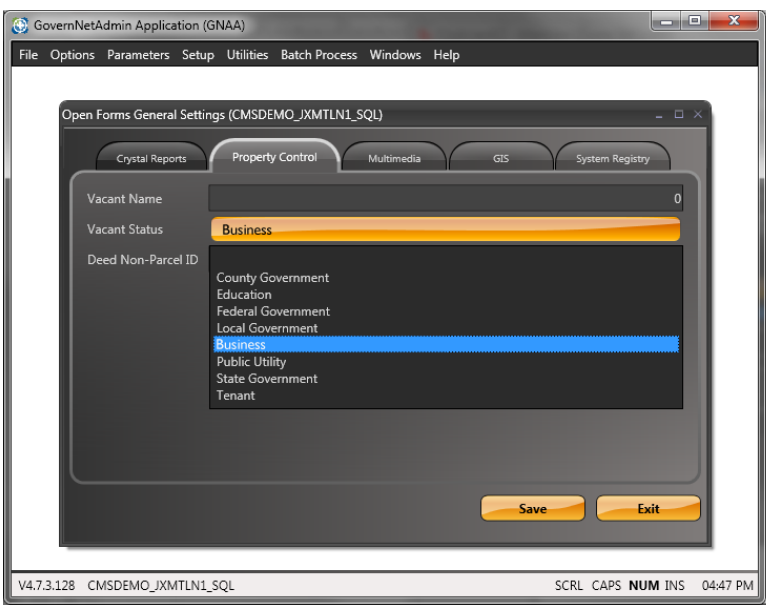
Occupancy Costs are assessed to the owner of the business occupying the premises. This *Business Occupancy Assessment* (**BOA**) is maintained separately from the *Real Property Assessment* function. Changes to the *BOA* are triggered in the premises records that are used to populate the income approach models associated with the *Real Property* parcels. This causes changes to the income approach calculation between assessment cycles that are difficult to reconcile with the property valuation reported on the most recent tax roll. History for the premise records can be obtained with a user designed *Crystal Report* or *Query*.

Business / Occupant and “Vacant” Premises

In *Govern*, the **Business / Occupant** sub tab under the *Names* form is used to define a business and the status. If the premise is vacant the current *Business / Occupant* should be set to the status of **Previous**. The business name record with its associated owners is retained for future reference. A *Vacant Owner* is created to designate the property as vacant. A *"Vacant Owner"* will be created to provide for vacant assignment.

The **Date Effective (As-Of)**, and **End Date** fields are used to specify a range. When an *End Date* value is specified, the system will create a new *Vacant Occupant Name* record with the *Date Effective (As-Of)* equal to one day after the specified *End Date*. When a new occupant is entered, the system will update the *Vacant* record with the *End Date* being equal to the day before the *Date Effective (As-Of)* of the new *Occupant* record.

The *Business Identification Number* (Table/Column: USR_KEY_MASTER.BX_ID), is stored in the NA_NAMES table under the ACCOUNT_NO column which is generated automatically..



> **Note:** The *Vacant Name ID* is specified in the *Govern NetAdmin* (**GNA**) application under *Setup* > *OpenForms Configuration* > **General Setting Editor**, click the **Property Control** tab. Likewise the status that is selected determines the records affected by the *Vacant* processing. *See the Govern NetAdmin (GNA) user guide in the General Settings Editor section for details.*

Setup of "Vacant Processing" in GNA

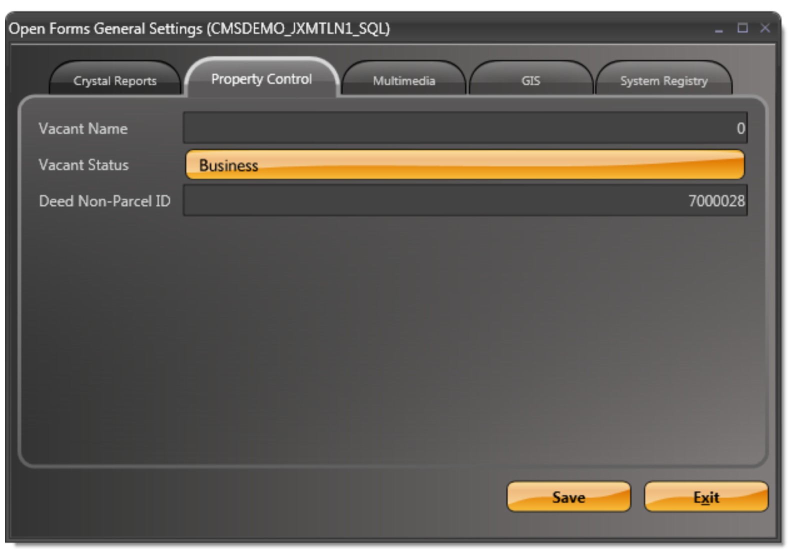
To implement *Vacant Processing*, the following steps must be taken.

In *Release 4.7 of the Govern NetAdmin* (**GNA**)...

1. Select *Setup* > *OpenForms Configuration* > **General Setting Editor**.
2. In the *OpenForms General Settings* editor, click to select the **Property Control** tab.

> **Note:** The entries made in the following steps will be written in the OCCTYPE table.

3. Enter the Name ID of the record created for vacant, and select a status from the **Vacant Status** parameter (Table: OCCTYPE).
4. Click **Save**.

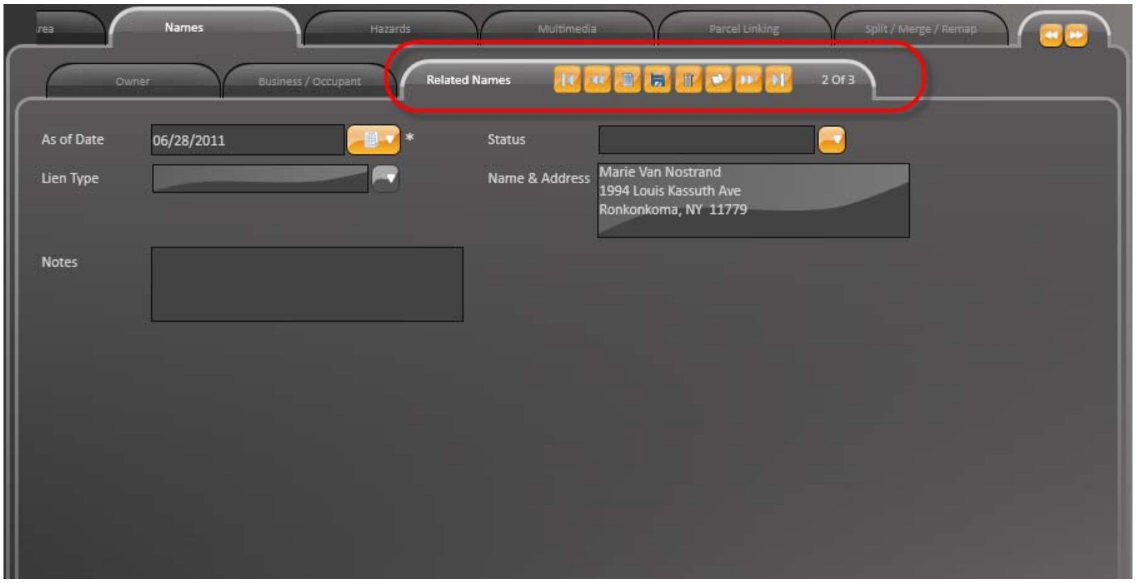


Only the occupants having, a status that is equal to the one selected in this screen, e.g. *Business*, will be processed by the *Vacant* function.

Best Practices for Vacant Processing Implementation

This record will be linked to many properties, and as a result it is necessary to ensure that no one will delete the record. For this reason, it is recommended that a new *Department*, a *Name Group*, or both be created. The name should then be set to *Restricted Name and Address*.

Related Names



The *Related Names* form is used for keeping track of individuals and companies that are associated with a property, but are not owners or occupants. These individuals, or organizations such as banks or mortgage companies may be associated with a lien or interest in the property.

To access this form:

1. Open the *Property Control* profile.
2. Double-click the **Property Information** *OpenForm*.
3. Select the ***Names*** tab; click the **Related Names** sub tab.
4. Open a record.
5. In the *Treeview* area on the upper left hand side (LHS), select **Related Lien Names**.

Creating a New Related Name Record: Click **New** to open the Search screen. Click Search to assign an existing name record to the current parcel.

Modifying Related Name information: Click **Name** to open the *Name & Address Maintenance* form and make your modifications on this screen.

As of Date (effective as of): Double-click in the field and select the date from which the lien is effective, from the pop-up calendar. This date is referenced by several departments and used in numerous reports.

Lien Type: Select a **Lien Type** from the drop-down list for this mandatory field; for example, bank, mortgage company or lien name (Table: VT_USR_LNAMEST).

Status: Select one of the following options:

- **Current** if the name is active
- **Previous** if the name is no longer active
- **Alternate Source** if the name is supplied from a source not maintained in the system, such as a tape supplied to the municipality from the county.

Note: If a property has only one Related Name and the information is loaded from an external system, such as tapes supplied by the country, the status then is **Alternate Source** even though the system handles the related name as **Current**.

Notes: This field provides unlimited space for notes and comments.

Name & Address: This field displays the name and address of the related lien name.

Note: This field cannot be modified directly on the screen. Make any changes through the *Name & Address Maintenance* form. See *Names & Addresses on page 70*.

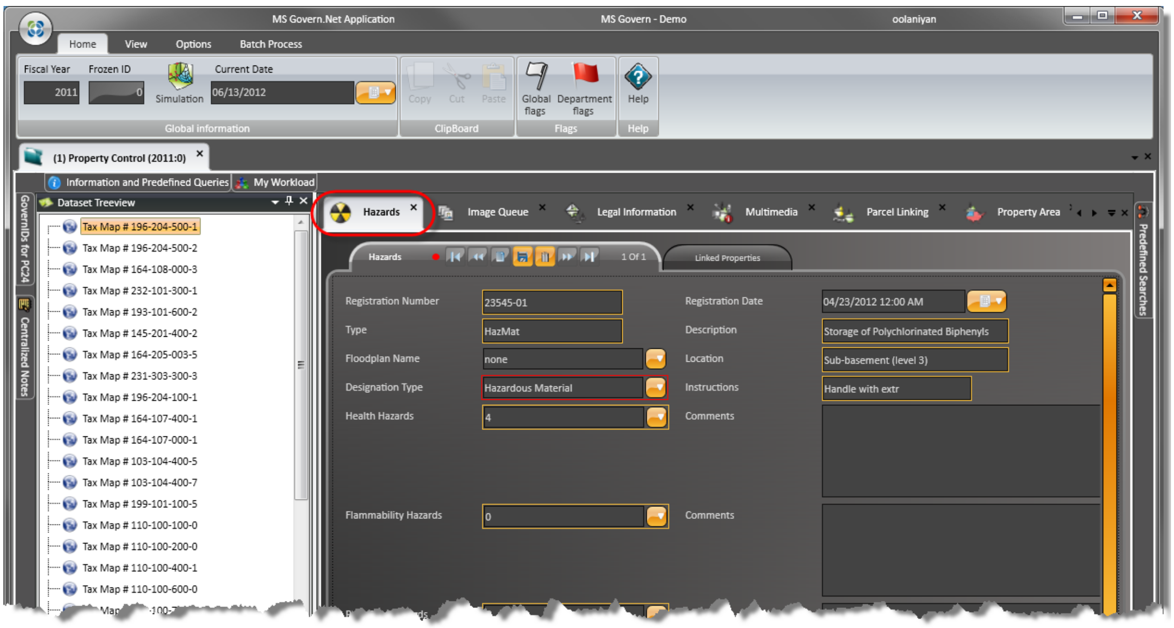
Linking Process - Parcel, Building, and Name

The following is an explanation of the business process which the *Govern* system is following, as it relates to the *Parcel Linking*, *Building Linking*, and *Name Linking* functions in the *Property Control* profile, and related *OpenForms*.

Govern's Property Control profile provides a two (2) way link between businesses and the business premises that they occupy. When a business premise is created, the user links to a business. The business premises are defined as non-parcels that are linked to the main parcel with the *Parcel Linking OpenForm*. *See Parcel Linking on page 184 for details*

The *Business / Occupant* form in the *Property Information OpenForm* allows a business (Table: NA_NAMES), to be linked to business owners. The *Name Linking* form allows names to be linked to other names based upon a user specified *Link Type*. If the business location is unoccupied and defined as such, it's name and address record is designated as *Vacant*. *See Business / Occupant on page 110 for details.*

Hazards



The *Hazards* form is used for setting up and maintaining property records with dangerous or variable land conditions, including hazardous areas and conditions, heritage areas, floodplains, environmental factors and protected wildlife areas.

To access this form:

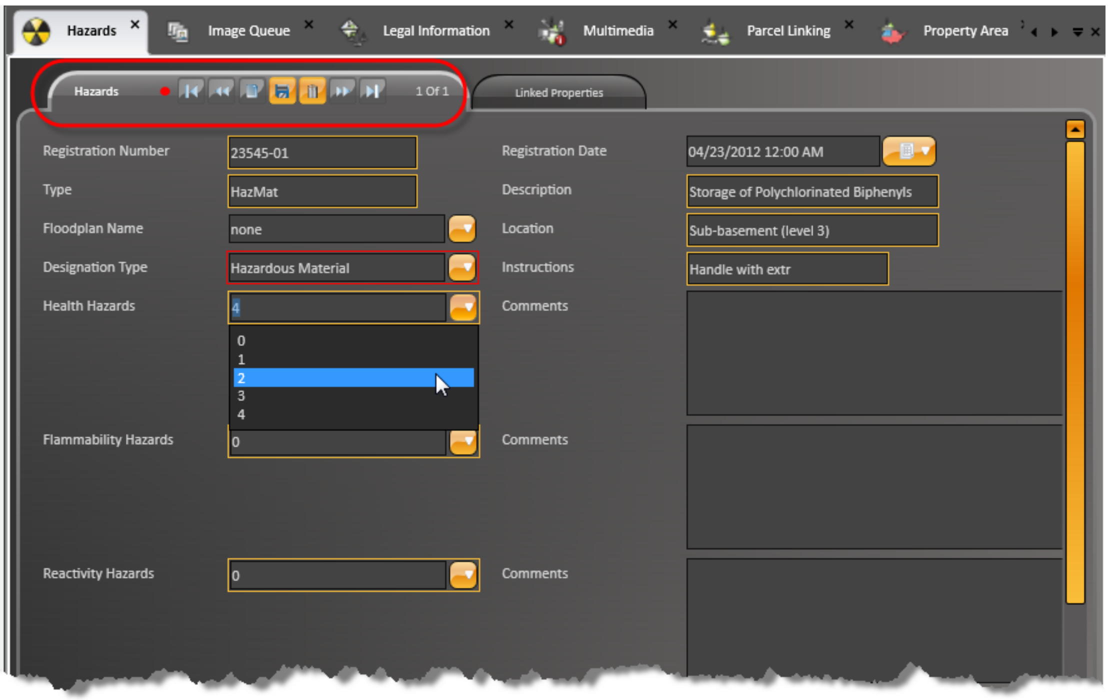
1. Open the *Property Control* profile.
2. Double-click the **Hazards** *OpenForm*.
3. Open a record.

The Hazards OpenForm is made up of the following two (2) tabs:

- **Hazards** - Combining *General Information* and additional *Details*.
- **Linked Properties** - To allow the linking of additional properties to the record.

Hazards - Hazards tab

The **Hazards** tab is for entering registration number, date and general data regarding the hazardous material.



Hazards - General Information tab parameters

Registration Number: Enter the Registration Number.

Registration Date: By default this field displays the current date. If the registration date for the record is different, double-click in the field and select it form the pop-up calendar.

Type: Select a **Type** from the drop-down list to describe the type of hazardous material (Table: VT_USR_ENC_TYPE).

Description: Enter a description for the current record.

Floodplain Name: When applicable, select a floodplain name from the drop-down list (Table: VT_USR_FLOODPLA).

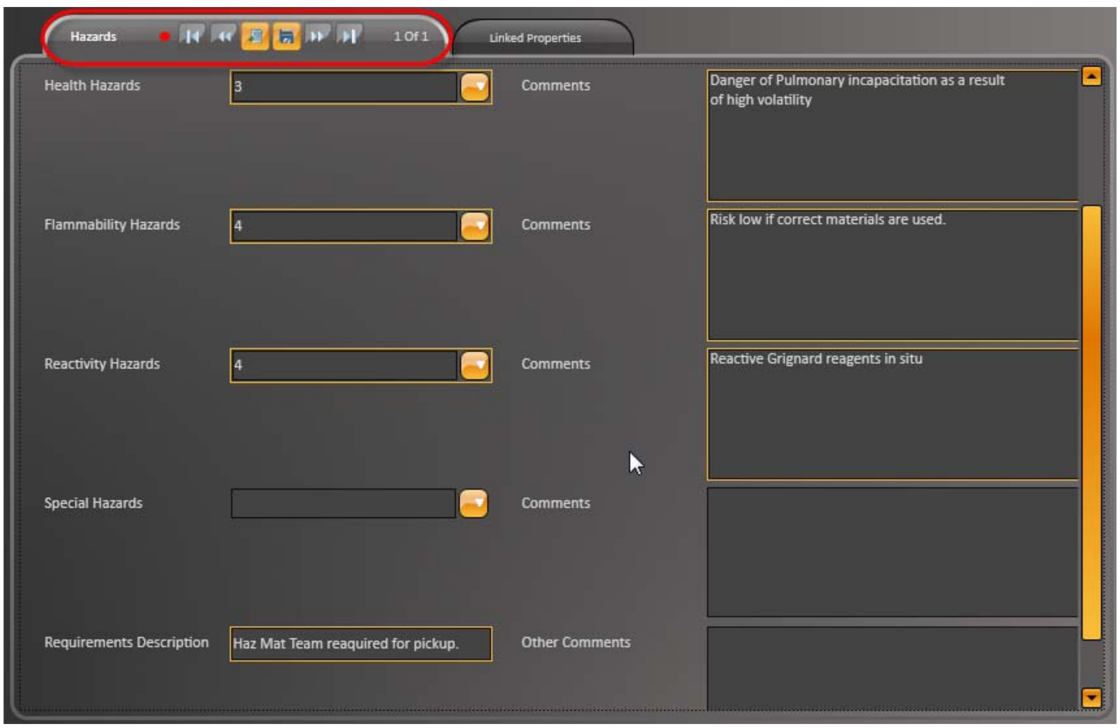
Location: Enter a location.

Designation Type: Select a **Designation Type** from the drop-down list (Table: VT_USR_DESIG_TY).

Instructions: This field provides unlimited space for any special instructions related to the current Hazardous Material record.

Additional Details

When additional **Details** are required, e.g. specific hazards or other information relating to the record.



Health Hazards: Select a Health Hazard from the drop-down list (Table: VT_USR_HAZARD1).

Flammability Hazards: Select a Flammability Hazard from the drop-down list (Table: VT_USR_HAZARD2).

Reactivity Hazards: Select a Reactivity Hazard from the drop-down list (Table: VT_USR_HAZARD3).

Special Hazards: Select a Special Hazard from the drop-down list (Table: VT_USR_HAZARD4).

Requirements Description: Select a Requirement Description from the drop-down list (Table: VT_USR_REQUIREM).

Comments / Other Comments: These fields provide space for additional notes or comments.

Select the **Linked Properties** tab to link the *Hazardous Material* record to other properties or to remove any existing links.

Hazards - Linked Properties tab

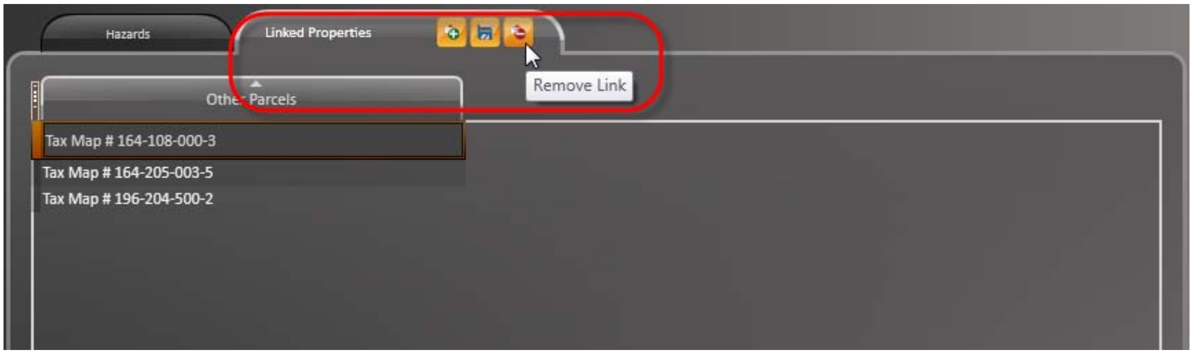
Adding a Link to Another Property: To link other properties to the current Hazardous Material record:

1. Click **Add Link**. This opens the *Add Link* parcel search screen.
2. Select a search type and enter any required information; click **Search**. The property record or records matching the search criteria appear in the *Search Results* pane.
3. Double-click the applicable record. The record will appear in the list under the **Linked Properties** tab.

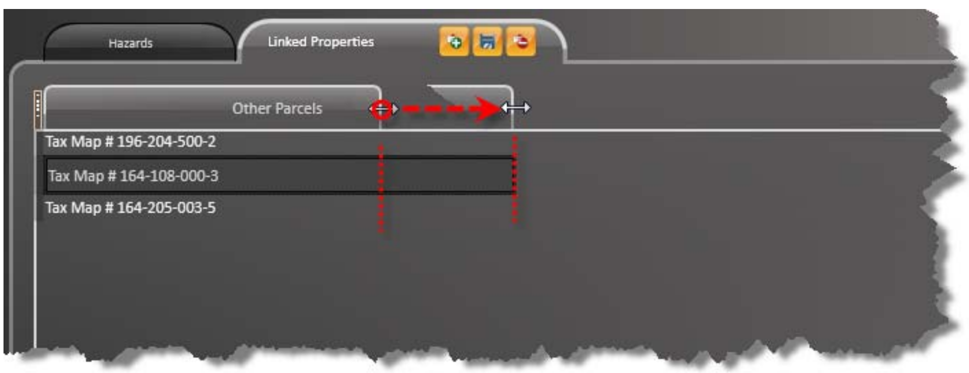
Removing a Link from a Property: To delete a property link from the current Hazardous Material record:

1. Highlight the tax map number in the **Linked Properties** list.

2. Click **Remove Link**.



TIP: When more space is required to display the information under the **Linked Properties** tab, the field can be expanded. Hover your cursor over the right hand side of the Other Parcels tab. When the double arrowheads appear, click and drag to the right to expand the field.



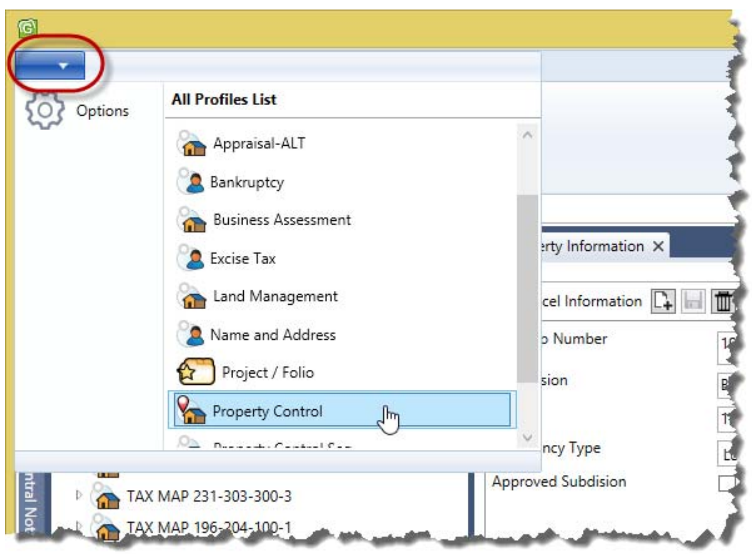
Property Information

Overview

Property Information OpenForms are used for recording and maintaining the basic reference information on each parcel. All data are saved to the PC_PARCEL table.

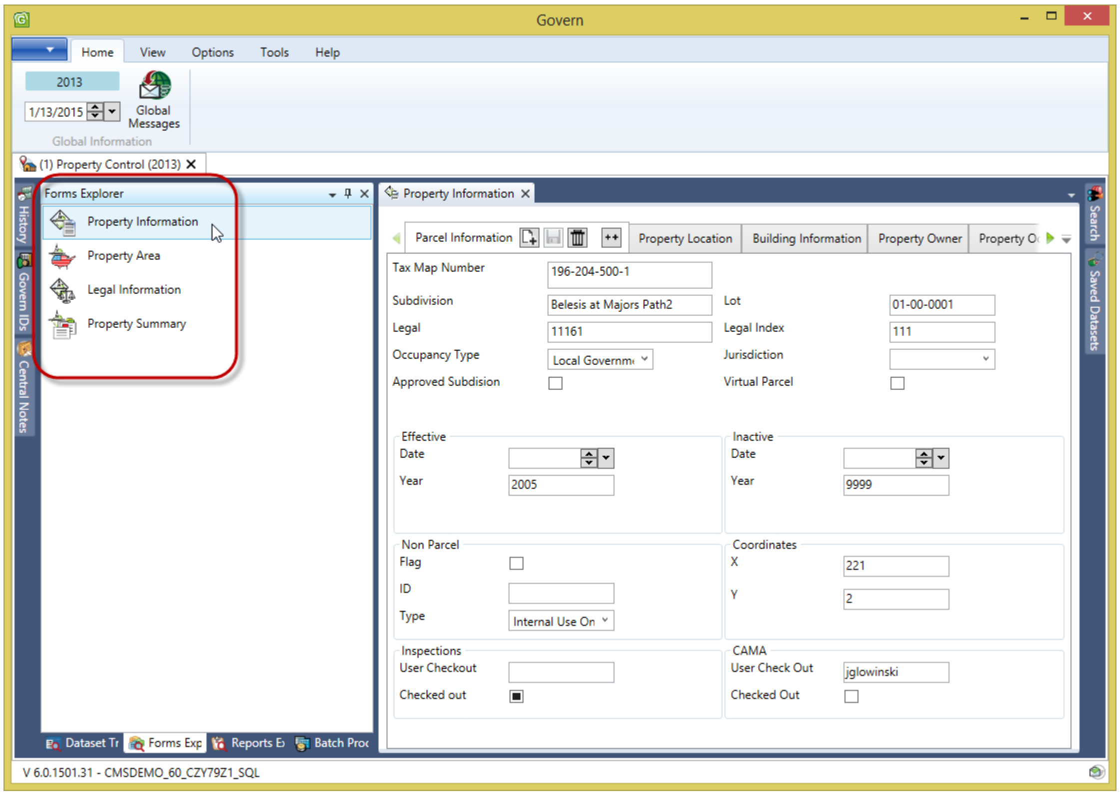
To access the *Property Information* OpenForm in *Govern*...

1. In *Govern*, click on the *Govern* suite button and select *Open* > **Property Control**.



2. Click the *Forms Explorer* tab to display the *OpenForms* that are in the **Profile**.

3. When the **Forms Explorer** is displayed, double click on the *Property Information OpenForm*.



General information tab

The *General Information* tab is used for recording and maintaining the basic *Parcel Information* i.e. reference information on each parcel. All data are saved to PC_PARCEL.

General Information tab Command Buttons

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 parcel record or entry. When selected the command buttons on the tab will display two options, **Cancel** and **Save**.

Save: To save the current parcel record with the entered parameters, click Save. This may also be used to save changes to parameters.

Deleting a Property Record: Click **Delete** to remove the *Current* or *Active* parcel from the database.

Tip: It is recommended to set the Property to **Inactive** rather than deleting it.

When you click *Delete*, a confirmation dialog box will appear. Click **Yes** to confirm the deletion.

Duplicate Data: When creating a new parcel, you may want to create a new parcel that uses duplicate data from the current tax map. Click Duplicate Data to create one or more parcels.

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

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

General Information tab Parameters

Tax Map Number: Enter the tax map number for the property.

Subdivision: Enter the Subdivision number for the property.

Lot: Enter the Lot number for the property.

Legal: Enter a legal designation number for the property.

Legal Index: If there is a designated legal index number, specify number here.

Occupancy Type: Select the *Occupancy* code from the drop-down list.

Effective Year: This field displays the year the parcel became active.

Effective Date: This field contains the “as of” date the parcel became active. click the Calendar button to select a date from the calendar.

Inactive Year: By default, 9999 is displayed in this field, signifying that the parcel is active. If a parcel becomes inactive, enter the effective year of inactivity in this field.

A parcel may become inactive due to, for example, a natural disaster. Also, a parcel becomes inactive when you subdivide it or merge it with another parcel using the split/merge feature. See *Property Information - Split / Merge / Remap tab on page 143*. If you use the split/merge feature, the system displays the inactive year plus the *Split Merge Number*.

Inactive Date: Enter an inactive date; i.e. the date after which the record is no longer valid.

Approved Subdivision: Select this option to indicate the parcel is in an approved subdivision.

Virtual Parcel: Select this option to indicate that this is a *Virtual Parcel*. For example, condominiums within a parcel are virtual in the sense that they exist virtually on a single physical parcel.

Jurisdiction: A jurisdiction is the geographic area over which legal authority extends; select the Jurisdiction Code from the drop-down list. This field is enabled only if **Support of Multiple Jurisdictions** is selected on the *System Registry Maintenance* form in the *Govern Admin* application.

Note: If you are using jurisdictions with the Mass Appraisal module, the Jurisdiction Code must be a number between two (2) and 32,760.

Note: You can increase the security of the system by applying user permissions by jurisdictions. *Refer to the Super User guide for details.*

Non-Parcel Flag: Select this option to enable the **Non-Parcel ID** and **Non-parcel Type** fields. The non-parcel designation is used for entities such as bridges or parks on which you are maintaining data.

Non-Parcel ID: Enter the non-parcel identification.

Non-Parcel Type: Select the non-parcel type from the drop-down list.

X coordinate: Enter X co-ordinates of the parcel.

Y coordinate: Enter Y co-ordinates of the parcel.

Inspections Checked out: If this parcel has been exported to an inspectors database, it will be indicated here. The parcel information will not be modifiable. The list of inspectors that have made an extract of the database are indicated in (Table: USR_USRFILES).

Note: *Super Users* will have the ability to override this flag when it is set.

MA Checked Out: If this parcel has been exported to an appraisers database, it will be indicated with a check mark. The parcel information will not be modifiable. The list of appraisers that have made an extract of the database are indicated in (Table: USR_USRFILES).

Note: *Super Users* will have the ability to override this flag when it is set.

Alternate Parcel ID: Enter an alternate parcel ID.

Map Number: Enter the map number for this parcel.

Parcel Change Date: Enter the parcel change date.

Parcel Index: Enter a parcel index to be used as an alternate reference.

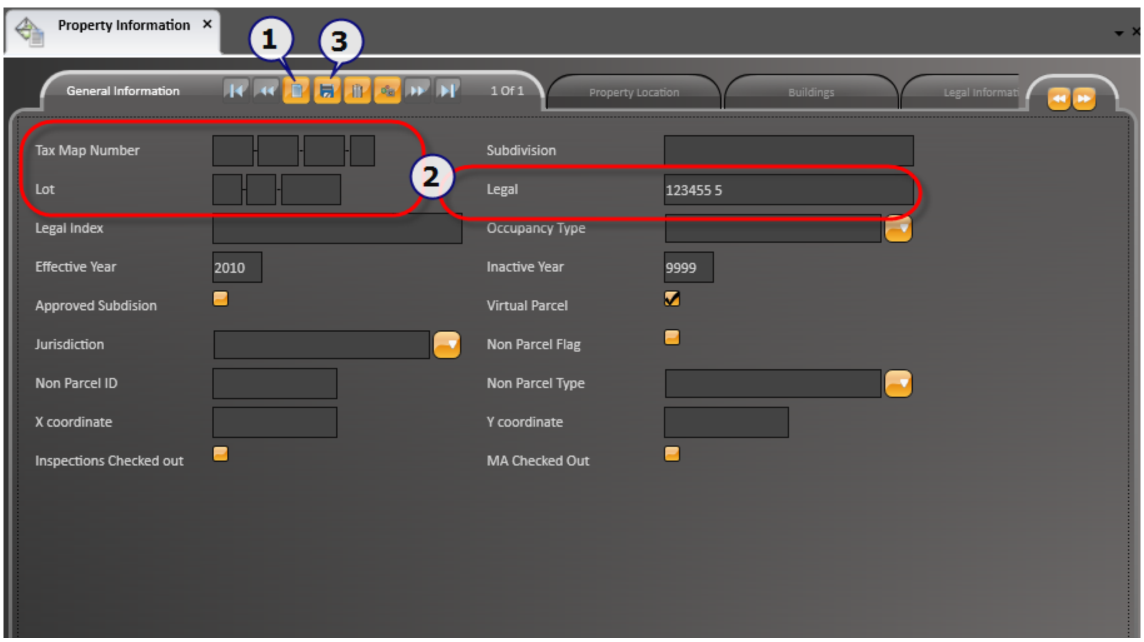
Note: Should additional tabs, fields, and command buttons be required, they can be specified by an *Administrator* in the *Govern Model Designer* (**MoD**). *For additional details, refer to the Govern Model Designer (***MoD***) guide.*

Creating Parcels

A parcel can be created using a method that is based upon requirements. When single parcels are required, the single parcel method is used. When multiple parcels are required, the **Duplicate Data** method can be used.

Creating a single Parcel

To create a new single parcel...



1. Click **New** on the *General Information* tab to create a new parcel.
2. Specify any one, or combination of the following:
   - Tax Map Number
   - Lot number
   - Legal (Alternate Parcel ID)
3. Click **Save**.

Any additional parameters can be added later and the parcel record re-saved..

Note: By default if a **Subdivision Name** is entered and a **Lot Number** is not provided, a *Lot Number* will be generated by the system.

When creating a parcel and a *Subdivision* is provided, the user will be forced to enter the *Lot Number*.

BUSINESS RULE FOR SUBDIVISIONS

When the first Subdivision is created, the *Lot Number* will be, by default, set to **1**, otherwise the *Govern* system will determine the highest numeric *Lot Number* and increment that value by 1.

For Example: If the highest *Lot Number* determined by the system is **20153**, the next system generated number will be *20153* + *1* = **20154**

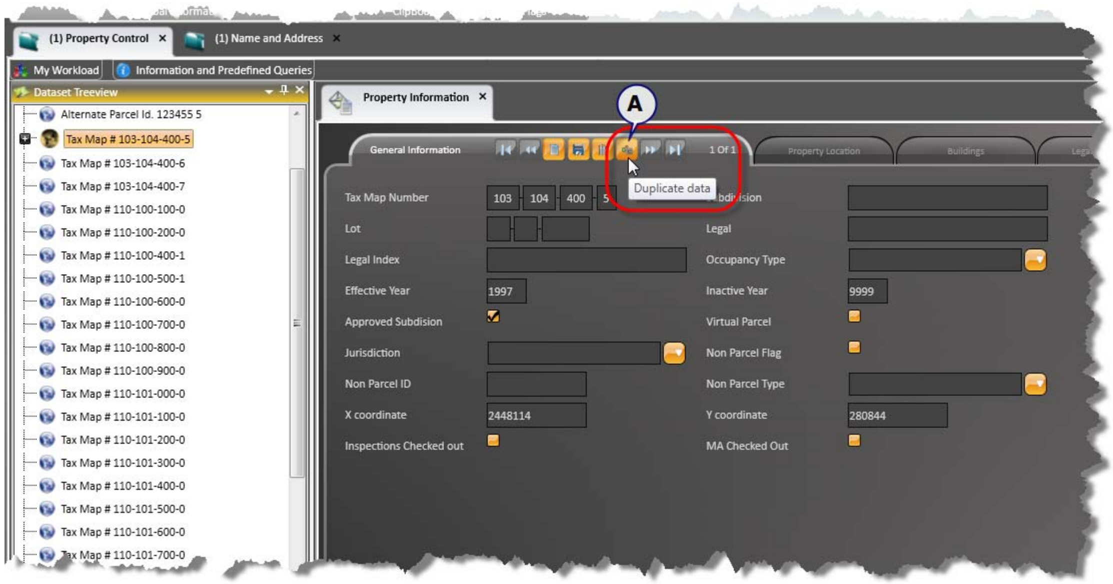
Creating Multiple Parcels

To create multiple parcels, i.e. for land developments, a newly created record, or an existing record can be duplicated with the parameters. This method is useful for land developments with multiple units.

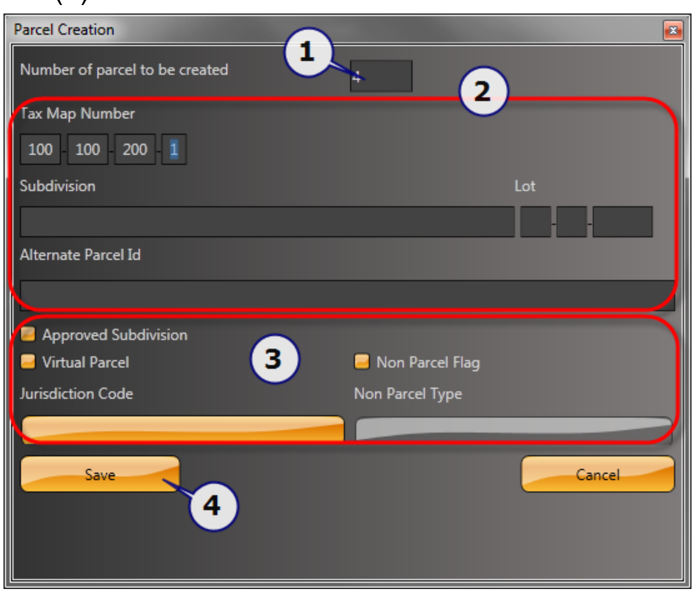
To create multiple parcels...

1. Follow the steps to create a new parcel from above or select a pre-existing parcel.

2. Click **Duplicate Data** on the *General Information* tab (**A**).

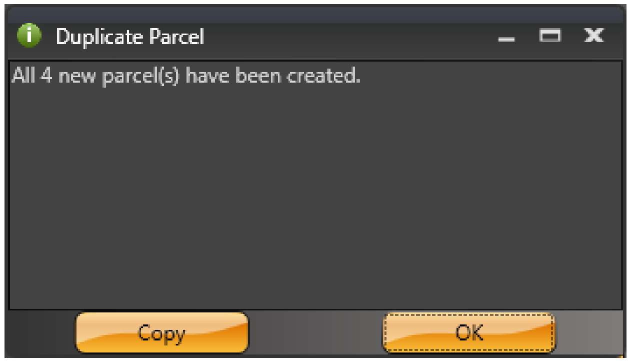


3. In the Parcel Creation form, specify the number of parcels to be created (**1**).



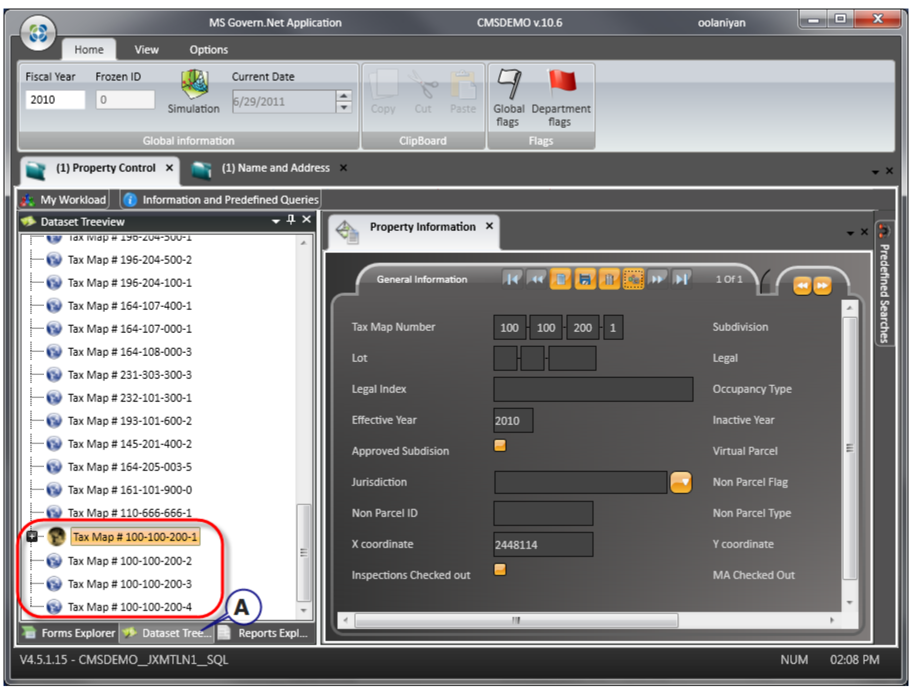
4. Specify one of the following (**2**):
   - Tax Map Number
   - Lot number
   - Legal (Alternate Parcel ID)
5. Complete any additional parameters (**3**).

6. Click **Save** (**4**); a confirmation screen will appear indicating the number of new parcels that have been created.



7. Click **OK** to continue.

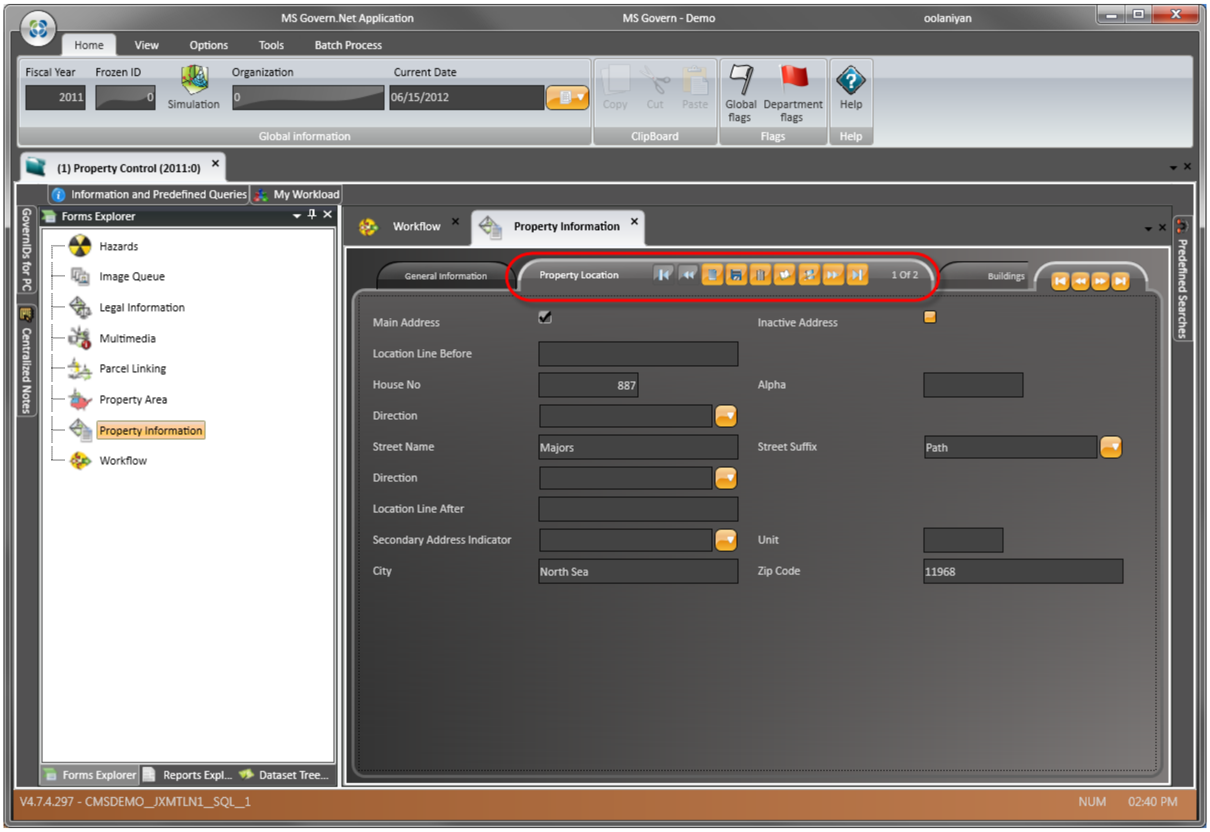
The newly created parcels will be appended to the bottom of the list of any records already existing in the *Dataset Treeview* (**A**).



Duplicating a Single Parcel

The above steps for creating multiple parcels may also be used to duplicate a single record. To duplicate the current open record, in the Number of parcel(s) to be created parameter, enter the number “1”.

Property Information - Property Location tab



The *Property Location* form is used for entering the address of each parcel. You can create as many property location records as needed for a parcel.

Property Location tab Parameters

Main Address: Select this option to designate this address as the main residence.

Inactive Address: Select this option to designate the current address record as inactive. An address can become inactive as a result of a disaster like a fire.

Location Line Before: Enter a text to be printed before the address line; for example, c/o “a person’s name”.

House No. Enter the civic number of the house.

Alpha: Enter an alphabetical designation. For example an address of 5009A; “A” would be a designation for a basement or bachelor apartment, 5009 would be the main address.

Direction: Select a direction for the address from the drop-down list; for example, 584a E Richcrest Drive S (Table: VT_USR_STRDIR).

Street Name: Enter the street name.

Note: If you are using Melissa Data address verification, addresses with P.O. box numbers are automatically formatted as follows:

The P.O. box number is displayed in the **House No.** field and the text,P.O. Box appears in the **Street Name** field, even if you enter the number in the Street Name field.

For example, if you enter P.O Box 751 in the **Street Name** field, the system displays 751 in the **House No.** field and *P.O Box* in the **Street Name** field.

Street Suffix: Enter the street suffix from the drop-down list; for example, St., Blvd. or Dr. (Table: VT_USR_STRTYPE).

Direction: Select a direction for the address from the drop-down list; for example, 584a E Richcrest Drive S (Table: VT_USR_STRDIR).

Location Line After: Enter a line to be printed at the end of the address; for example, P.O. Box # or c/o.

Secondary Address Indicator: Select the secondary address indicator from the drop-down list; for example, suite, unit, apartment, floor, etc. (Table: VT_USR_SECADD).

Unit: Enter the unit number.

City: Enter a city name.

Zip Code: Click to select the custom mask that will define the format of your Zip Code entry for the record. Click the Zip Code button (**A**) to display and select one of the customized field mask options available.

Creating a New Property Location

To create a new property location...

1. Click **New** on the *Property Location* tab.
2. Enter the *Location Line Before*, *House No.*, *Direction*, *Street Suffix*, and *Location Line After*.
3. Click the Zip Code button to choose a customized field mask for the format of the zip code that will be used.
4. Click **Save** to save the record.
5. After the save, the *Set Default Address* button will appear; click **Set Default Address** to specify that this information will be the main address.

Property Information - Buildings tab

The *Building Information* tab is used for creating and maintaining building records for the current property. Each record is assigned a *Building ID* by the user, or a new *Building ID* is generated. A *Sequence Number* is also generated for each unit within the building. For example, you can use sequence numbers for separate condominiums within a building.

Note: The *Building ID* (**bldg_ID**) is a unique system generated number that will stay with the building.

Buildings tab Command Buttons

New: Click **New** to clear the parameters so that you can enter new data.

Saving a Building ID: Click **Save** to save the new building record in the database.

Deleting a Building ID: Click **Delete** to remove the current building record from the database.

Viewing Building Records: The Building form displays the building records for the current property.

Use the right / left navigational arrows to view single records or click **Browse** to view a list of all the records.

Linking the Multimedia Function to the Building: Click the **Multimedia** tab to access the *Multimedia Information* form. You can link any type of multimedia information to the building, including image, audio and video files. In addition, with the Object Linking and Embedding (OLE) function you can store a link to any type of document that is OLE-enabled; such as a Word or Excel document. You can store an unlimited number of text lines and each department can define customized multimedia codes. *See Multimedia on page 48*.

Buildings Options

When you click the **New** button, the form is cleared to allow a new entry.

New Building ID: Select this option if you are creating a new building record. The **Building ID** option will be disabled.

Building ID: Select this option to add a building ID from an existing building ID. This number is used for maintaining information on separate units within a building; for example, a residential building divided into separate condominiums. The address and some of the structural elements, such as the exterior walls are shared; however, each unit has a separate owner and several unique structural elements. The **New Building ID** option is disabled when this option is selected.

Effective Year: Enter the effective year. This is the appraisal year for the building. By default, the fiscal year of your department is entered in this field.

Inactive Year: Enter the year the building became inactive or is no longer in use.

Note: The default year is 9999 for active properties.

Past records are retained on inactive buildings.

Building Location: Select an address for the building, from the drop-down list (Table: PC_LK_PARCEL_BLDG).

Secondary Address Indicator: Select additional information to add to the address, if applicable; for example, apartment, condominium, etc. (Table: VT_ USR_SECADD).

Unit: Enter a value to be added to the **Second Address Indicator**, such as an apartment number.

Creating a New Building

To add a new building to the currently selected parcel...

1. Click **New** to clear the form under the buildings tab.
2. Enter an Effective Year.
3. In the Inactive Year parameter, enter the year that the building will cease to exist, typically a value of 9999 is entered.
4. Select a building location from the drop down list.
5. If applicable select additional information to add to the address, i.e. an apartment, condominium, etc.
6. If an apartment, enter an apartment number.
7. Click **Save**.

This new building record is now added to the current parcel record. If the parcel is undergoing a Split/Merge/Remap process, the building record will be added to the building list and can be assigned to new parcel. *See Assigning a Building Record to a Split / Merge / Remap on page 159 for details.*

Property Information - Names tab

The *Names* tab is composed of sub tabs used for maintaining owner information, when applicable, business occupants of a property or building, and the individuals and companies that may be associated with a lien or interest in the company.

Owner tab

Located under the Names tab, the *Owner tab* is used for setting up and maintaining property owner information, such as name and address, status, occupancy and the source that the information was obtained from. The *Date Effective (As of)* field ensures that each department has access to the correct owner information. For example, the *Building Department* may be required to work with the most current owner, while the *Assessor Department* needs information on the owner from the previous fiscal year.

To access this form:

1. Open the *Property Control* profile.
2. Double-click the **Property Information** *OpenForm*.
3. Select the ***Names*** tab; click the **Owner** sub tab.
4. Open a record.

Creating and Modifying Owner info.

Creating a New Owner Record

Click **New** to open the *Name Search* screen and do one of the following.

- Click **New** to create a a new owner record.
- Click **Search** to assign an existing name record to the current parcel.

Modifying Owner Information

Click **Name** to open the *Maintenance* form and make your modifications on this screen.

Name & Address: The parameter contains the name and address of the selected record. This information cannot be modified here.

Date Effective (as of): Click beside the field and select the *Date of Ownership* from the pop-up calendar. This is the date the displayed person can claim ownership of the property. This date is referenced by several departments and used in numerous reports.

% Ownership: Use this field to indicate the percentage of ownership if there are multiple owners.

Note: This value is not used in any calculations.

Priority Sequence : If there are multiple owners (or multiple previous owner) enter a priority to indicate the order you want the owners displayed on search screens and on the *Assessment Roll*. 1 has the top priority. If no priority values are entered, the **Effective Date** is used and the most recent owner is displayed first.

Source of Information: Select the Source of Information from the drop-down list (Table: VT_USR_OWSOURCE).

Status: Select one of the following options: **Current**, **Previous** or **Alternate Source**.

Note: If a property has only one Owner and the information is loaded from an external system, such as tapes supplied by the county, the Owner status is **Alternate Source** even though the system handles the owner as **Current**.

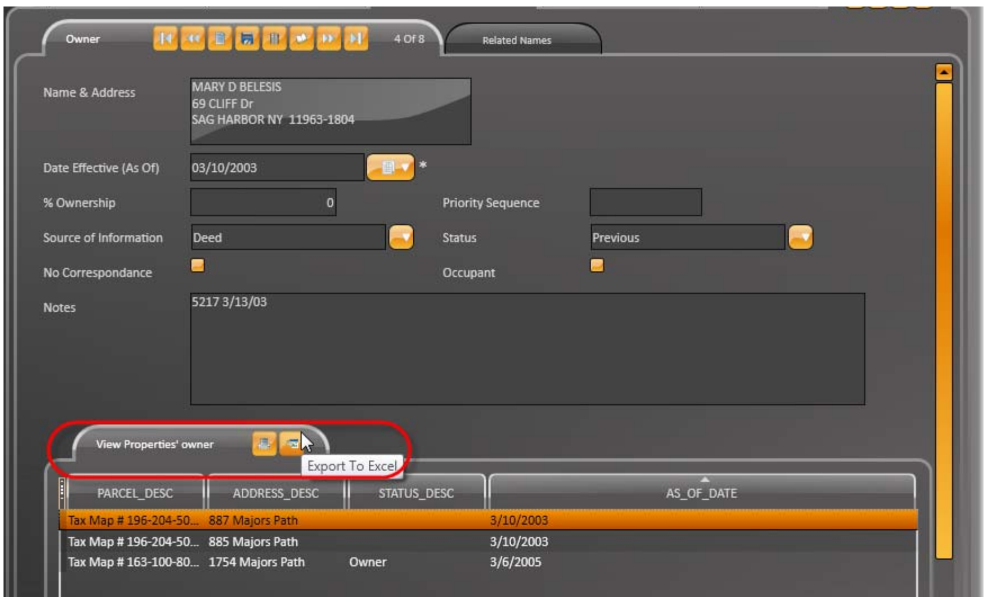
No Correspondence: Select this option to indicate the owner does not want to receive any correspondence.

Occupant: Select this option if the owner is also the occupant.

Notes: This field provides unlimited space for notes and comments.

View Properties' Owner sub-tab

This is an informational tab that is embedded within the *Owner* tab.



Properties Related to Owner: This grid displays the names and addresses of any additional properties that are related to the owner of the property.

Note: This grid cannot be modified directly on the screen and is dynamically updated.

View Properties' Owner sub-tab Command Buttons

 **Print:** Click Print to print out the information in the Names & Addresses grid.

Export to Excel: The contents of the grid can be exported as an excel spreadsheet. User will need to have a licensed version of MS Excel to access the exported file.

Names - Related Names tab

The *Related Names* form is used for keeping track of individuals and companies that are associated with a property, but are not owners or occupants. These individuals, or organizations such as banks or mortgage companies may be associated with a lien or interest in the property.

To access this form:

1. Open the *Property Control* profile.
2. Double-click the **Property Information** *OpenForm*.
3. Select the ***Names*** tab; click the **Related Names** sub tab.
4. Open a record.
5. In the *Treeview* area on the upper left hand side (LHS), select **Related Lien Names**.

Names - Related Names tab

Creating a New Related Name Record

Click **New** to open the Search screen. Click Search to assign an existing name record to the current parcel.

Name & Address: This field displays the name and address of the related lien name.

> **Note:** This field cannot be modified directly on the screen. Make any changes through the *Maintenance* form. See *Names & Addresses on page 70*.

As of Date (effective as of): Click the date button to display the pop-up calendar, and select the date from which the lien is effective. This date is referenced by several departments and used in numerous reports.

Status: Select one of the following options:

- **Current** if the name is active
- **Previous** if the name is no longer active
- **Alternate Source** if the name is supplied from a source not maintained in the system, such as a tape supplied to the municipality from the county.

> **Note:** If a property has only one Related Name and the information is loaded from an external system, such as tapes supplied by the country, the status then is **Alternate Source** even though the system handles the related name as **Current**.

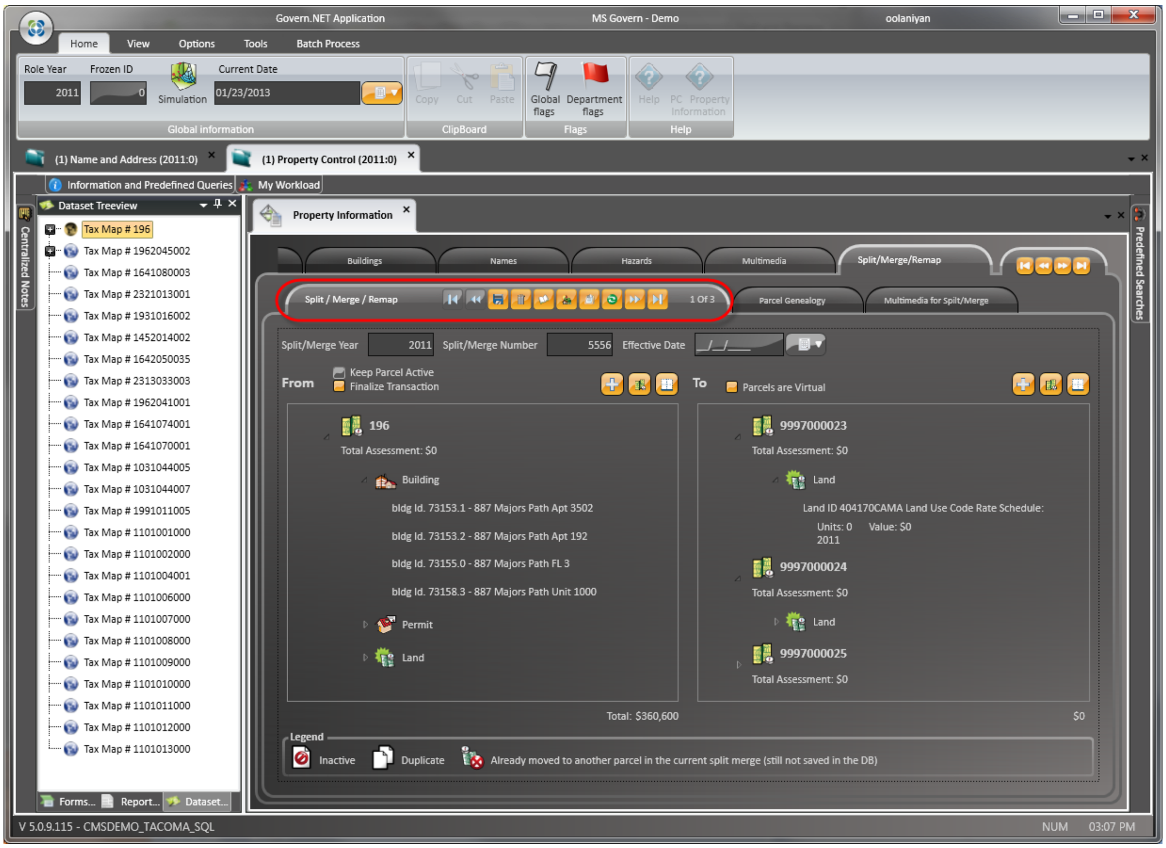
Lien Type: Select a **Lien Type** from the drop-down list for this mandatory field; for example, bank, mortgage company or lien name (Table: VT_USR_LNAMEST).

Notes: This field provides unlimited space for notes and comments.

Property Information - Multimedia tab

The multimedia function in the Property Information profile permits users to include any multimedia document types with the parcel. This can include land surveys, blueprints, etc. *Refer to Multimedia on page 48 for details.*

Property Information - Split / Merge / Remap tab



In the Property Control or Mass Appraisal modules, the *Split / Merge / Remap* (**SMR**) form is used for modifying property records in order to:

- Remap or change a tax map number
- Split or divide a parcel into two or more smaller parcels
- Merge or combine two or more parcels into a single parcel

Buildings, *Personal Property Accounts*, *Permits* and *Multimedia Documents* can be reassigned from the split or merged parcel to the new ones. When the option to finalize the process is selected, the original or *From* parcel is assigned the Frozen ID number –32 766 in the following database tables:

Frozen & Other Assigned ID's

Records from the current fiscal year are assigned a Frozen ID of zero (0). Frozen IDs vary according to whether the record is frozen in sales or from the audit record. The following table lists Frozen IDs as well as other assigned IDs:

Record Status	Frozen and Other Assigned ID's
Current Year Record	0
Sales Record	1, 2, 3, 4...
Closed Year Record	-1 (*Exceptions are transactions that are not* ***Finalized****; see Finalize Transaction option on page 153.*)
Audit Record	-2, -3, -4, -5...
Simulation Data	32 767
Split Merged Data	-32 766 and higher; e.g. -32 765, -32 764, -32 763...

Refer to the Frozen Records section of the Govern CAMA General Information user guide for details.

Mass Appraisal

- MA_MASTER
- MA_INCOME
- MA_MISC_STRUCTURES

Property Control

- PC_AREA
- PC_GENEALOGY
- PC_LEGAL_INFO
- PC_MESSAGE
- PC_LK_PARCEL_BLDG
- PC_OCCUPANT

Personal Property

- PP_ASSESSMENT

- PP_EXEMPTIONS
- PP_LEVY_MASTER
- PP_LK_LEVY_EXEMPT

Real Estate

- TX_RE_ASSESSMENT
- TX_LEVY_MASTER
- TX_EXEMPTIONS

Note: If you have the Tax and/or the Mass Appraisal Modules, you need to balance the Assessment values manually.

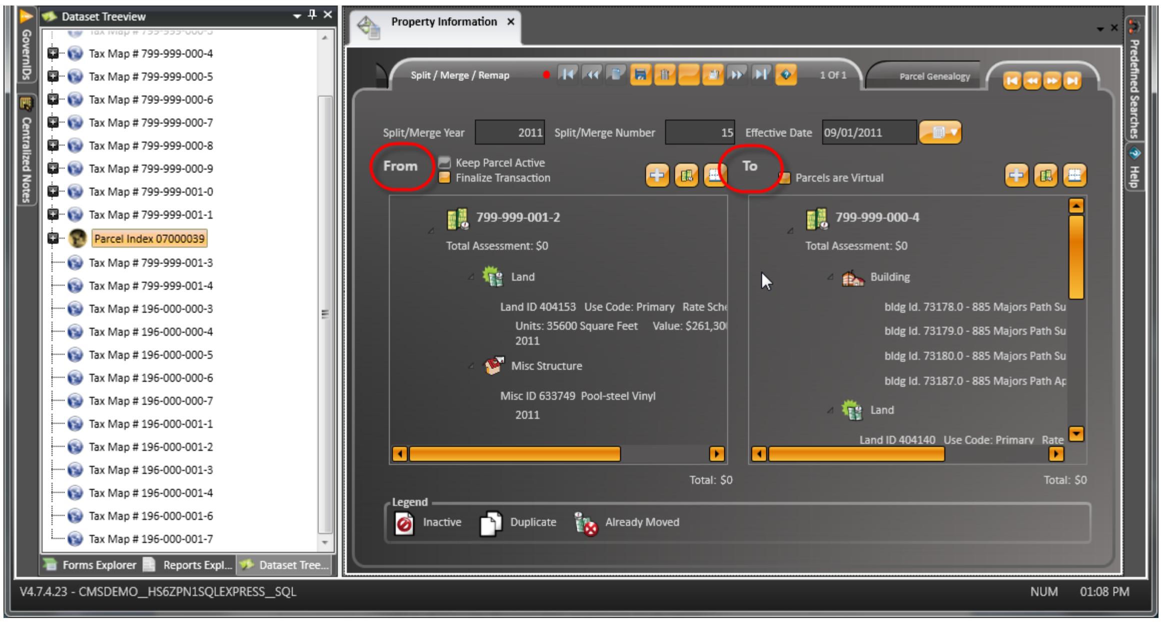
All changes made to properties through the Split / Merge / Remap form are tracked in the Audit Trail.

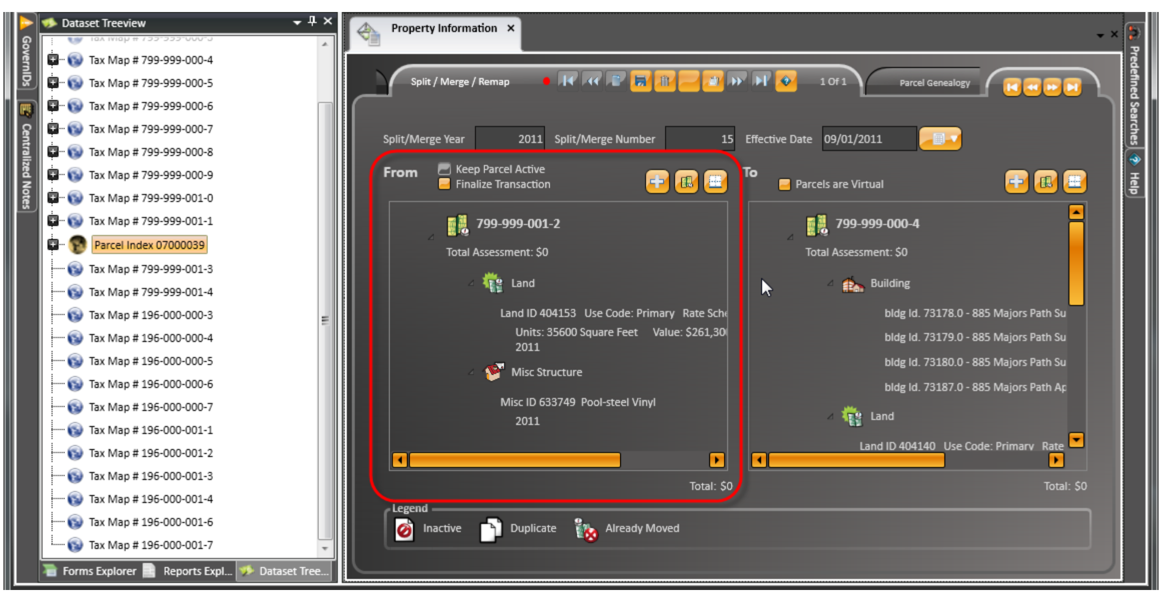
To access this form, select the parcel record to be split...

1. Under the *Property Information OpenForm*, click to select the **Split / Merge / Remap** tab.
2. Click **New**; the parcel record will be loaded into the **From** pane on the left hand side of the form.

Parent and Child Parcels

The *Split / Merge / Remap* form is split into two (2) areas, a **From** (**Parent Parcel**) area on the left hand side, and a **To** (**Child Parcel**) area on the right hand side.





Split / Merge / Remap Command Buttons

Create / Modify a Split / Merge / Remap Record: Click **New** to create a new *Split / Merge / Remap* transaction.

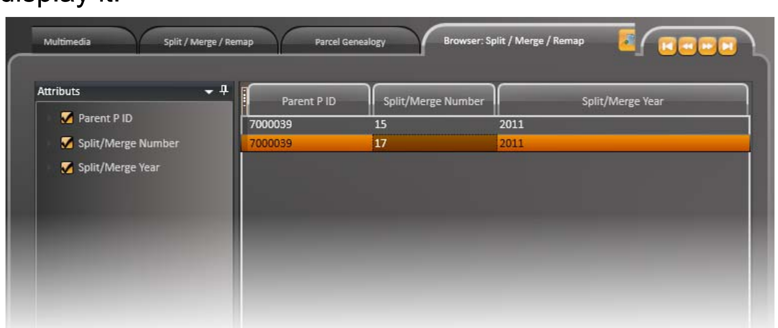
Cancel the creation of a Split / Merge / Remap Record: When you click on the **New** button to create a new split / merge / remap record, the **New** button changes to the **Cancel** button. Click this button to cancel the creation of the current record.

Save a Split / Merge/ Remap Record: Click **Save Split / Merge** to save a Split/Merge/Remap transaction to the database (Table: PC_GENEALOGY, PC_TRANSACTIONS). The *Personal Property Account Repartition* and *Building Repartition* screens are displayed if the Personal Property and Building records have not been reassigned.

Delete a Split / Merge/ Remap Record: Click **Delete** to delete a Split / Merge /Remap transaction from the database. The parcels that were included in the transaction will be reset to the original.

Note: You cannot delete a split/merge/remap record if *child* parcels are linked to another split/merge/remap record.

Browsing Split / Merge/ Remap Records: Click **Browse** to view existing *Split / Merge / Remap* records. Double click on a record to select and display it.



Set Parcels to Treeview: Click to add the parcels created, or added to the *Split / Merge / Remap* process to the Dataset Treeview. *See Adding Current Parcels to the Treeview on page 149 for details.*

Add Source Parcel: (**A**) When one or more source parcels are required, click this button to display the Search form.

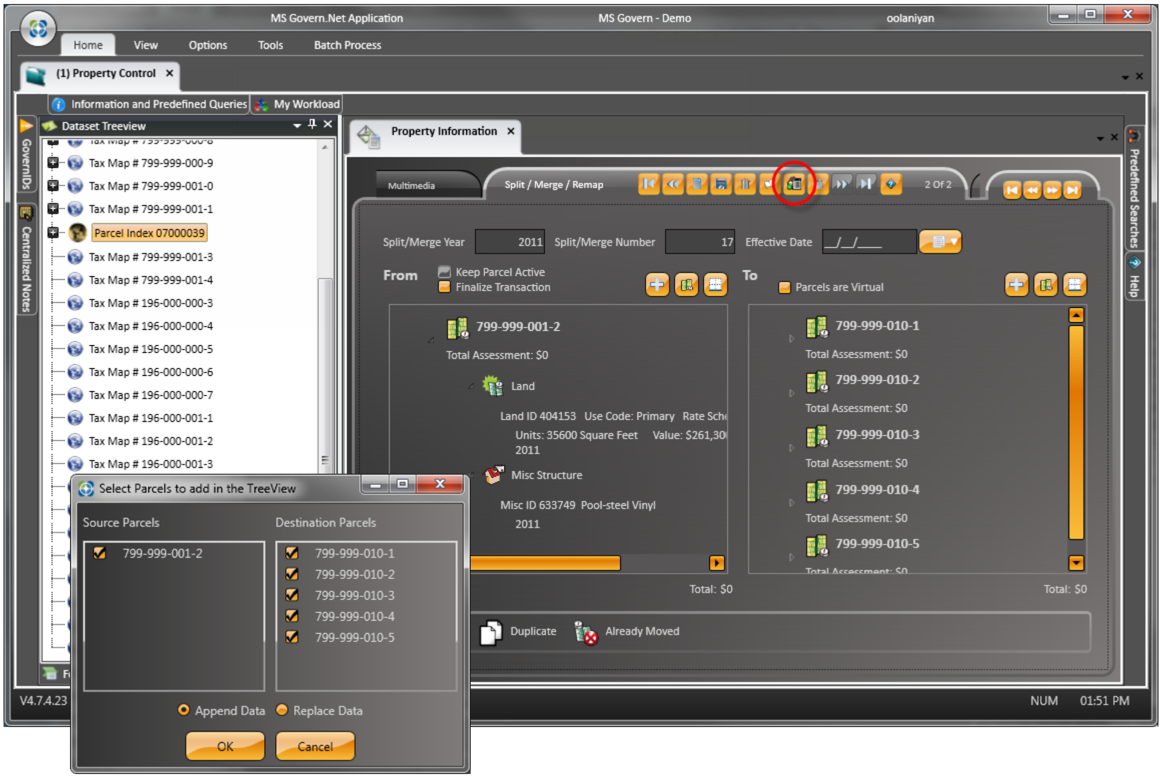
Create Source Parcel: (**B**) Selecting this button will allow you to create new parcels by duplicating the current loaded parcel.

Expand/Collapse All: (**C**) When drilling down into the icon representing Land, Misc. Structure, etc. It can be tedious to collapse all the records to get a view of the top level icons. Click **Collapse All** to collapse all expanded icons.

Add Destination Parcel: (**D**) Click to select a destination parcel from the search form. This is a parcel that you may want to add a building or a permit to using the drag and drop interface.

Create Destination Parcel: (**E**) Use this feature to create a destination parcel that duplicates the currently selected record.

Adding Current Parcels to the Treeview



When parcels are generated as a result of the *Split / Merge / Remap* process, they are automatically appended to the dataset in the *Dataset Treeview*. When a destination parcel is manually added using the *Add Destination Parcel* button, or changes have been made to the parcel information, you may want to update or append to the Dataset Treeview. To update, click the **Set Parcels to Treeview** button. When selected, the **Select Parcels to add in the Treeview** form is displayed providing the option of *Appending* to the existing dataset, or *Replacing* the dataset with your source, and, or destination parcels.

To add *Split / Merge / Remap* parcels to the *Dataset Treeview...*

1. After adding parcels or modifying the *Split / Merge / Remap* data, click **Set Parcels to Treeview**.
2. In the **Select Parcels to add in the treeview** form, click to select the parcels that are to be added to the *Dataset Treeview*.

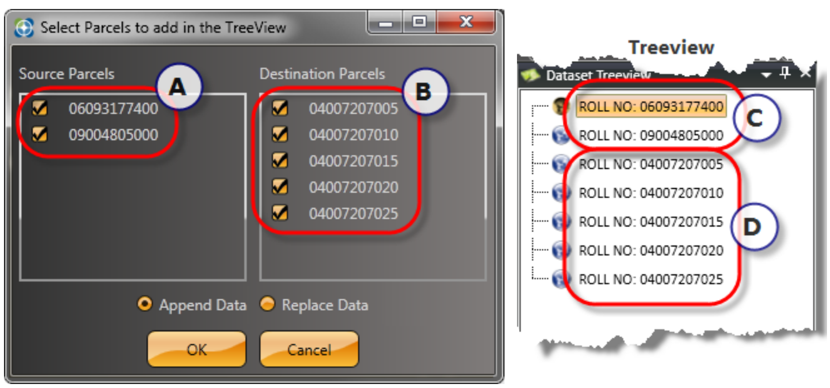
Note: By default all parcels are selected from the *Source Parcel* and *Destination Parcels* list.

3. Click to select **Append Data** to add the parcels to the existing dataset, or click Replace Data to remove the current dataset and replace it with the selected parcels.
4. Click **OK**.

Rules when Appending / Replacing

Append Data

When the results of a split merge transaction are appended (**Append Data**) to the dataset in the treeview, a sort by *Roll Number / Tax Map Number*, is applied. The *Source* parcel (**A**) will be displayed first, followed by any *Destination* parcels (**B**) in the *Treeview*.



Replace Data

If the **Replace Data** option is selected, the sort by *Roll Number / Tax Map Number*, is applied, the *Source* parcel is displayed first followed by any *Destination* parcels, but the group will be placed at the bottom of any properties already existing in the *Treeview*.

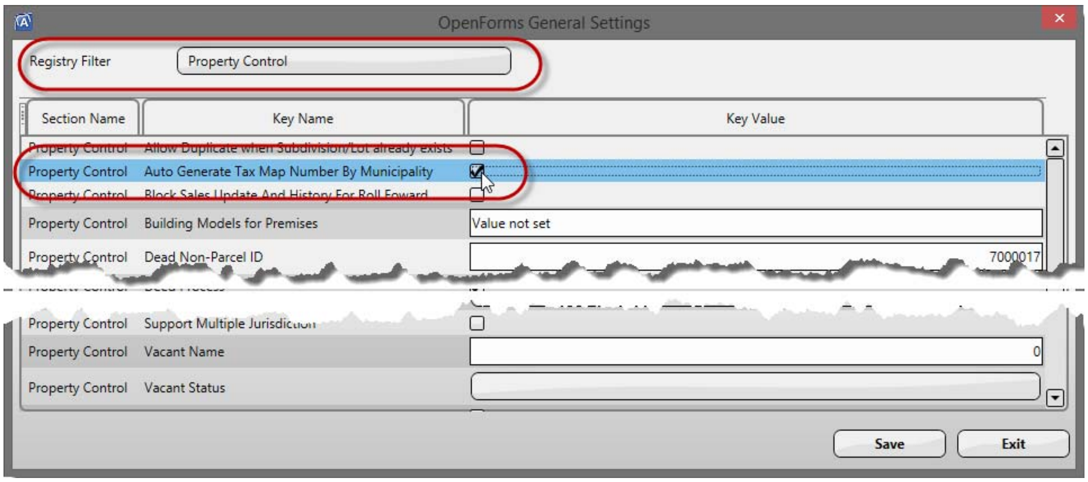
Auto-Generate Tax Map Number by Municipality

When enabled, this feature will allow the auto-generation of a tax map number by municipality when new properties are created in *Property Information* or in the *Split/Merge/Remap* function. The system will generate the next available tax map number by incrementing the returned tax map number with the given municipality code from the **PC_PARCEL** table. To use the auto-generate tax map feature, it will need to be enabled in the **SY_REGISTRY**. To setup the auto-generate option...

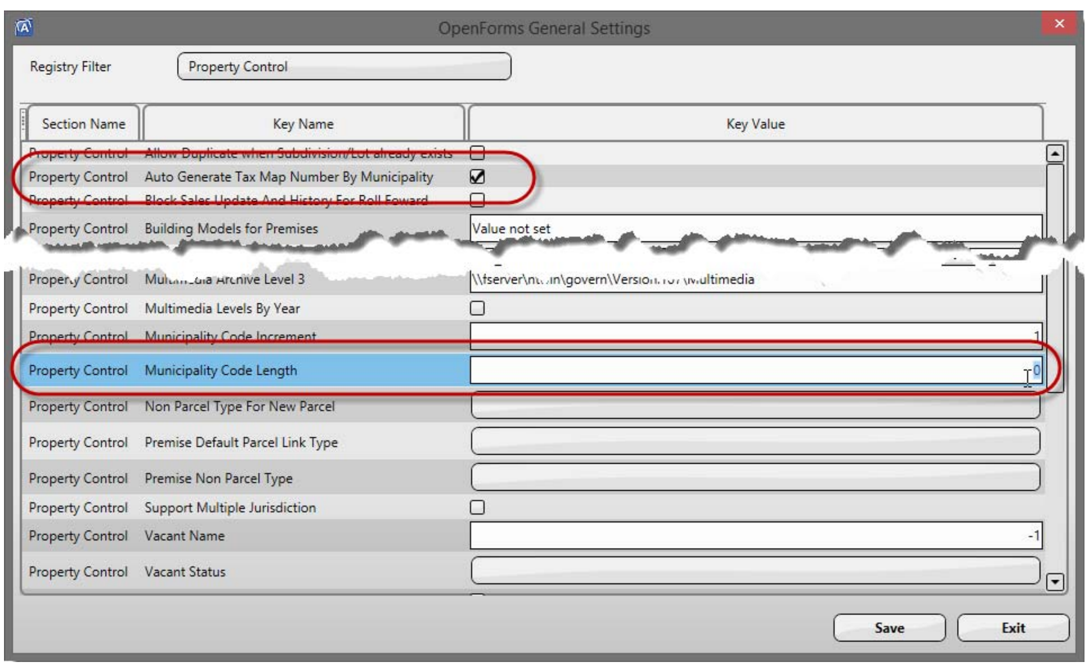
Configuration in the Govern New Administration (GNA)

Open the *Govern New Administration* (**GNA**)...

1. In the *GNA* select the *System Parameters (tab)* > **General Setting Editor...**
2. In the *OpenForms General Settings* form, locate the *Registry Filter* parameter; click to select **Property Control** from the drop down menu..



3. Select the **Auto Generate Tax Map Number By Municipality** option.



4. In the **Municipality Code Length** parameter, enter the length of your municipality code; this is the fixed portion of your Tax Map number.
5. Click **Save** to save the settings.

In *Govern* when a new parcel is generated, or parcels are created as a result of the Split/Merge/Remap process, the Tax Map numbers that are generated by the system will be based upon the rules set for Municipality Code Length.

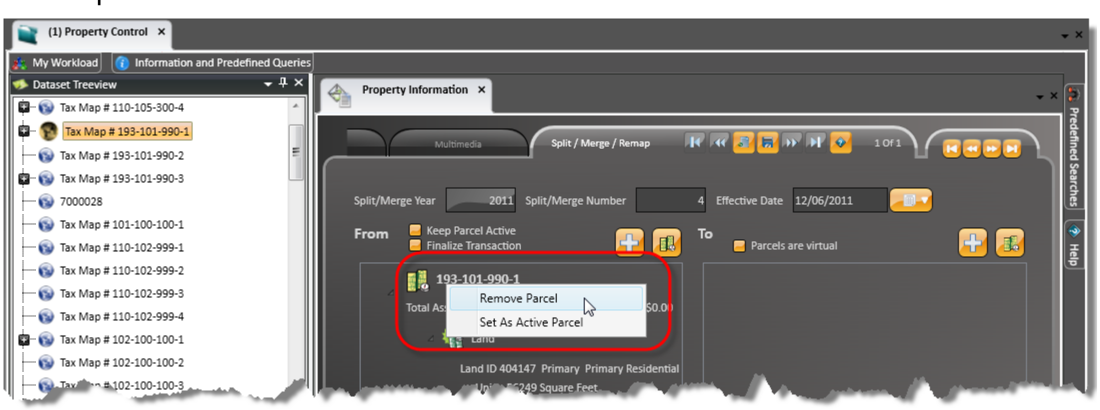
Split / Merge / Remap Parameters

Split/Merge Year: This parameter displays the year that the split/merge will take effect, by default the current fiscal year of the department is displayed. (Table: V_PC_GENEALOGY)

Split/Merge # Number: This field displays the *Split / Merge Number* (**SM_NO**). If this field is empty when the Split/Merge transaction is imported to *Govern* from a *GIS*, a number less than 10,000,000 is generated and entered. Any number generated by a *GIS* must be greater than 10,000,000.
(Table: V_PC_GENEALOGY)

Effective Date: The effective date is the date in which the Split/Merge/ Remap takes effect.

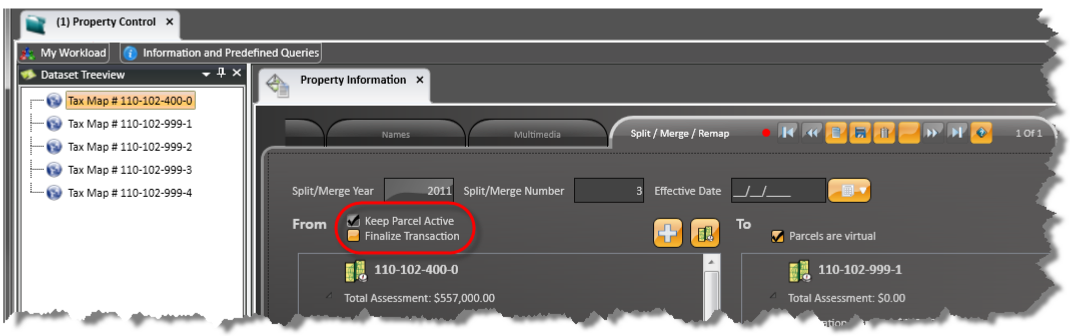
From / To (Tax Map): The **From** parcels are the parent parcels while the **To** parcels are the child parcels. Position your cursor in the appropriate **From** and **To** columns and use the **Add Source** or **Add Destination** buttons to add a parcel. When the parcels have been created, placing your pointer over the parcel and a right click of the mouse button will reveal a menu to remove the parcel.



When you click **Add Source Parcel** or **Add Destination Parcel**, the *Parcel Search* screen appears. Enter the required criteria and click **Search** to locate a parcel. This parcel will then be displayed in the **From** or **To** column depending on which column you had initiated the add procedure from.

Note: Should you need to have the next following options selected by default, refer to the **Select Keep Parcel Active** as default in **Split/ Merge Function** option in the Super User guide.

Keep Parcel Active option



Keep Parcels Active: When a split/merge process is performed, unless the user specifies otherwise, the parent parcel will no longer be active, i.e. the parcel record will be designated as "frozen". To avoid immediately designating the parent parcel as *frozen*, the check box for **Keep Parcels Active** should be selected; this option gives users the opportunity to verify the status of the account.

Finalize Transaction option

Finalize Transaction: Selecting the **Finalize Transaction** option will result in the original, or *From* parcel, being assigned the Frozen ID number –32 766. Once this option has been selected and a **Save** performed, modifications can no longer be made. The record will have to be deleted and the data re-entered. *Refer to Frozen & Other Assigned ID's on page 144 for the list of affected tables.*

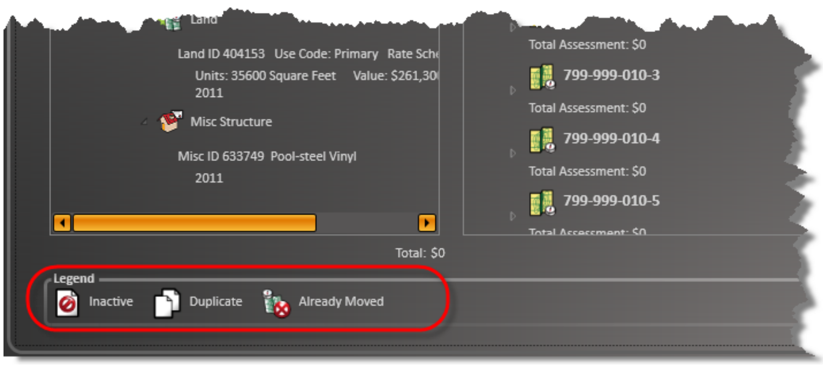
Note: Closed year records are assigned a Frozen ID number of **-1**. When a Split Merge Remap transaction is not **Finalized** in a specific year, the system will **NOT** record the -1 record for that year as an indication that the transaction is still pending.

Parcels are Virtual

Parcels are Virtual: Select this option to indicate the parcels are *virtual*. Virtual parcels are used by the *GIS* system; for example, they may represent properties within a parcel, such as condominiums within a building.

Legend group

In the Legend group you will find an explanation of the icons that may be observed in the **From** or **To** columns.



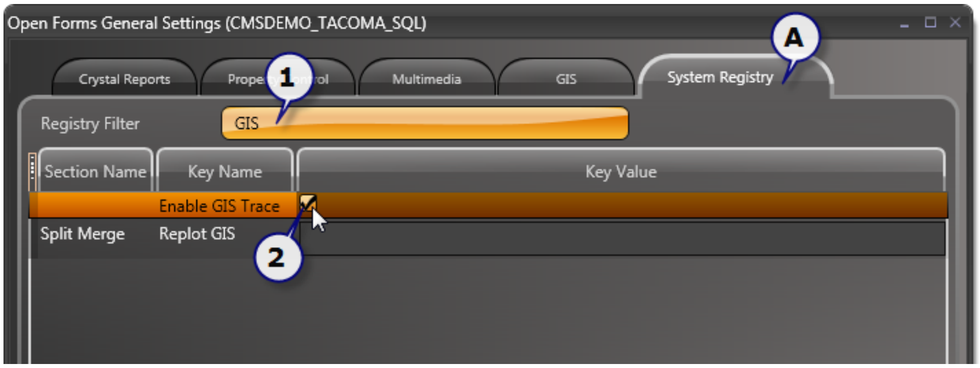
Issues Loading Parcels from a GIS

Occasionally there may be issues with the loading of files from a *GIS* system. If there is a system error with the loading of a a group of parcels, it will be necessary to identify the parcels. There is an option to enable the generation of a trace log file that will assist in the identification of the problematic parcels. In (Table: SYS_REGISTRY), the “GIS Flag” “Enable tracing” will be set to **TRUE**.

To turn on the trace log file feature...

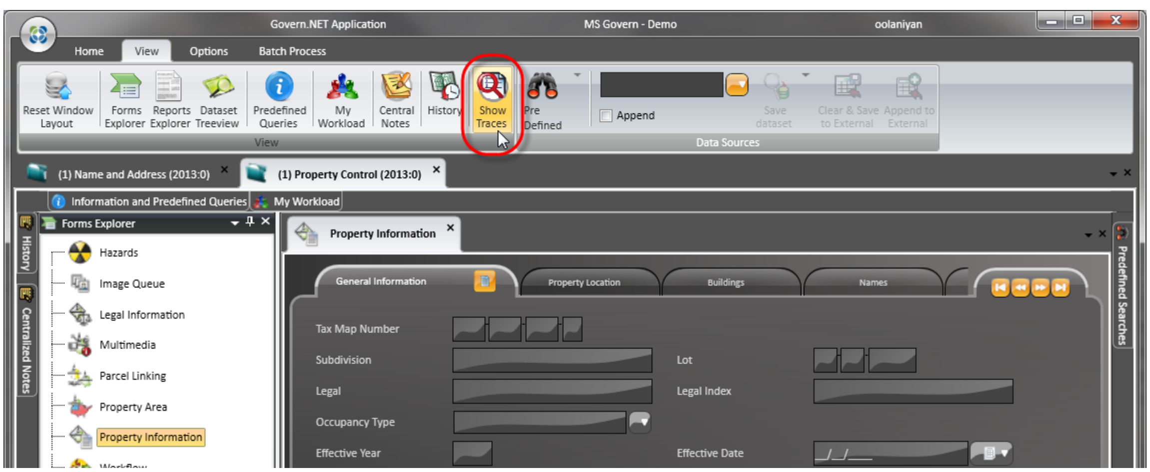
1. In the *Govern New Administration* (**GNA**) select *System Parameters* > **General Setting Editor...**

2. Click to select the *System Registry* tab (**A**).



3. In the *Registry Filter* parameter select **GIS** (**1**) from the drop down menu.
4. On the *GIS Flag* line, click the **Enable GIS Trace** option (**2**).
5. Click **Save** to save the setting.

Once enabled, a button called **Show Traces**, will be displayed in the ribbon of the *Govern* application under the **View** tab. When an error occurs, a click on **Show Traces** will display a log file called MSGovernTrace.txt. This file may contain information that can assist in determining the identity of the troubling parcel.



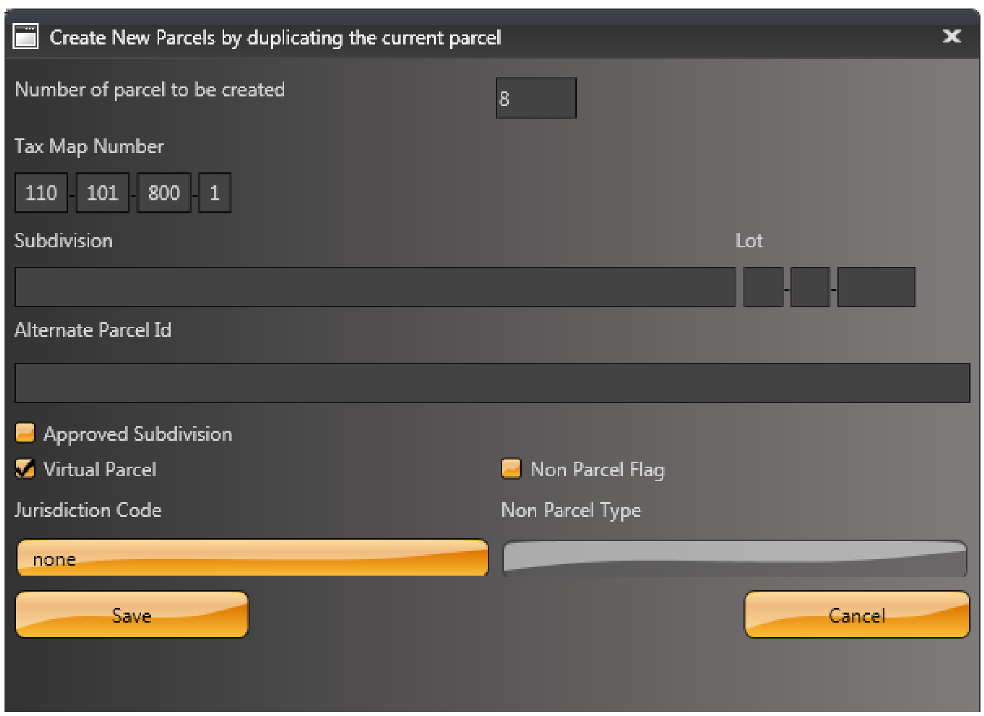
Performing a Parcel Split

For this example, a condominium complex has been built on a parcel. The intention is to split this parcel and present a tax bill to each occupant within the complex. Each condominium unit will use a separate tax map, but the understanding is that all of the units are within the same building. There are 8 units within the complex; we will use the *Virtual Parcel* option because the units still share the same physical parcel.

To perform a parcel split with the *Split \ Merge \ Remap*... function.

1. Search for a target parcel that will be split; click **New** under the *Split / Merge / Remap* tab. The selected parcel will appear under the From column.
2. Move to the **To** column and click **Create Destination Parcel**.
3. The **Create New Parcels by duplicating the current parcel** form will appear.

Create New Parcels by duplicating the current parcel - Parameters



Number of Properties to be Created: Enter the number of properties you are creating. If you are creating more than a single property, one is added to the last digit of the entered Tax Map Number, Subdivision or Lot Number for each new property.

Tax Map Number: Enter the complete tax map number for the new property or the first set of digits if you are creating multiple parcels. For this example enter the starting tax map number, the remaining tax map numbers will be automatically generated sequentially.

Subdivision/Lot: Enter the complete subdivision or lot number or the first set of digits for multiple parcel creation.

Note: A subdivision number can be used without entering a lot when the **Allow Duplicate when Subdivision/Lot already exists** option is selected in the OpenForms General Setting form *Refer to the option to Allow Duplicate when Subdivision/Lot already exists on page 4 for details.*

Alternate Parcel ID: Enter an alternate Parcel ID, if applicable.

Approved Subdivision: Select this option (Value = -1) to indicate that the new properties are an Approved Subdivisions.

Virtual Parcel: Select this option to designate the parcel as a Virtual Parcel. Typically, this is used for condominiums that share a physical parcel, but for which separate records are maintained. It is useful for GIS purposes.

Non-Parcel Flag: Select this option to add a Non-parcel Flag to the property. This can be used to identify an entity such as bridge or street section on which you are maintaining a record.

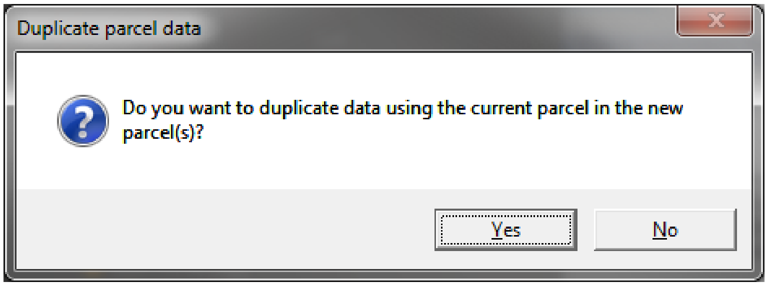
Jurisdiction Code: This field is enabled only if Support of Multiple Jurisdictions is selected on the System Registry Maintenance form in *Govern Admin*. Select a *Jurisdiction Code* to apply to the parcel.

Note: This field is mandatory if enabled.

Non-Parcel Type: This option is enabled if the Non-parcel Flag option is selected. Select the type from the drop-down list (Table: VT_USR_PARCEL).

1. Enter 8 for the number of parcels to be created, i.e. 8 condominium units.
2. Select the *Virtual Parcel* option for our example.
3. Click **Save** to create the new parcels.

4. A confirmation screen will appear; click **Yes** to accept.

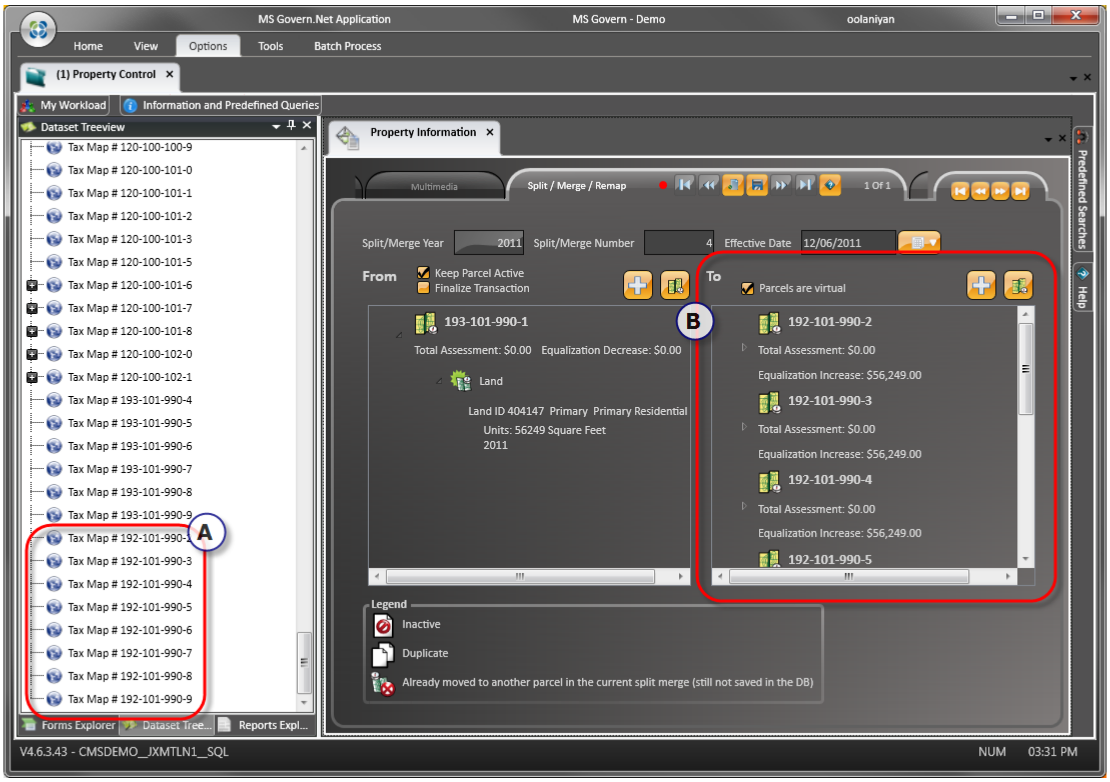


5. Another confirmation screen will appear indicating that the parcels have been successfully created; click **OK** to acknowledge..

The newly created parcels will be seen in two (2) locations in the user interface:

- **Dataset Treeview** - Look at the bottom of the list of the currently loaded dataset (**A**).

- **To** column under the **Split / Merge / Remap** tab (**B**).



Assigning a Building Record to a Split / Merge / Remap

If there are no existing buildings on the parcel, click the **Building** tab to create a new building on the current *Tax Map Number* after a Split, Merge or Remap has been performed. *See Creating a New Building on page 127 for steps to create a building on a parcel.*

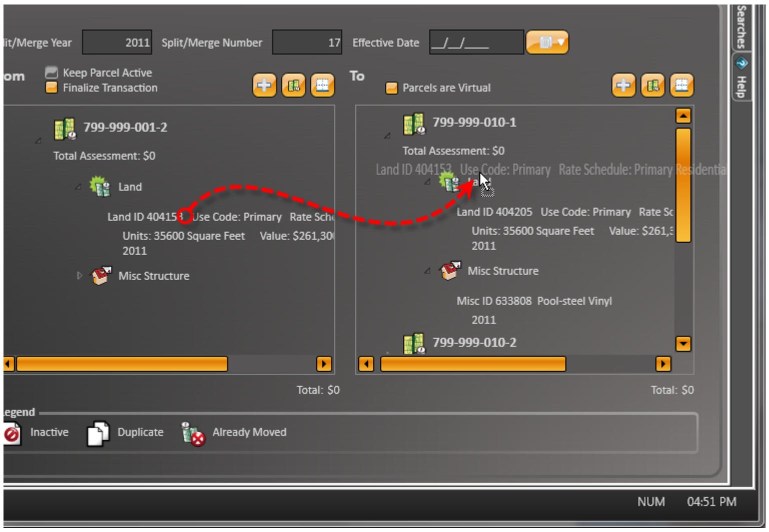
When there are existing building on the parent parcel under the **From** column, they can be assigned to any one of the newly created parcels.

Assigning a Building record to a Child parcel

To assign a building to a newly created parcel...

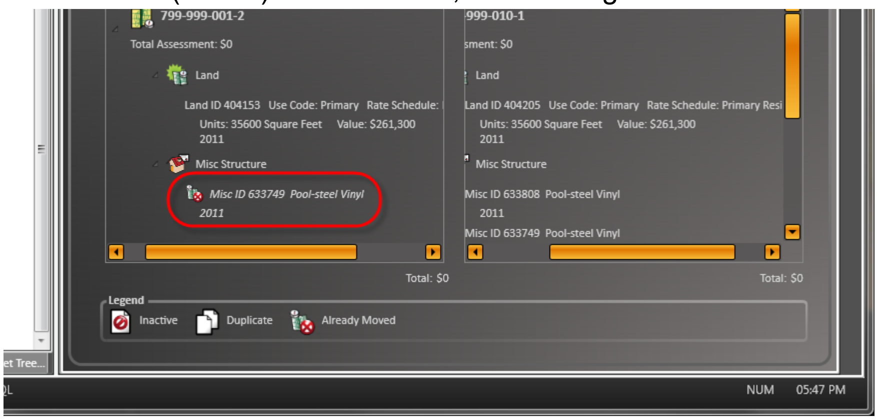
1. Look under the Building list, click and drag **the text** describing the Building record to the target parcel that the building will be assigned to.

2. Release the *Mouse* button.



3. After the release of the mouse button, a window with a grid will be displayed.

The building **From** (**Parent**) parcel record will now be associated with the **To** (**Child**) parcel record. In addition under the list that the **From** record was dragged from, you will see an indicator that the building record was assigned (an “X”). Once moved, the building cannot be selected for another parcel.



Note: The above steps for assigning a building record are valid before saving the *Split / Merge / Remap* record. After the record has been saved, the assigned icon (“X”) beside the building record will disappear.

Removing a Building record from a Parent parcel before a Save

To remove a building record before a save...

1. Under the **From** column, i.e. location where the building record was dragged from, look for the icon indicating the assigned building.
2. Beside the icon, right click on the text describing the Building record.
3. Select **Restore Building** from the floating menu.

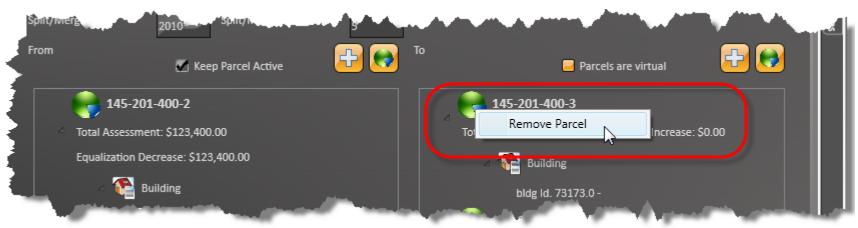
The building record will be removed from the child parcel and restored to the parent.

Note: The above steps for restoring a building record are valid before saving the *Split / Merge / Remap* record. After the record has been saved, the assigned icon (“X”) beside the building record will disappear and the building can only be restored by removing the child split/merge parcel record.

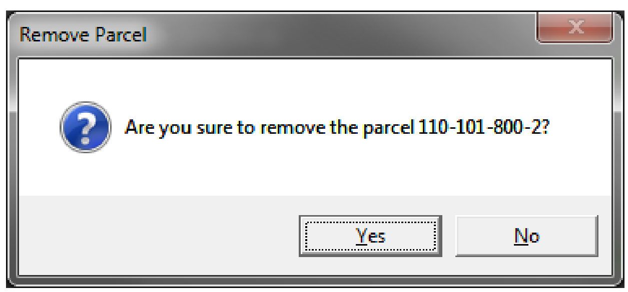
Restoring a Building record to a Parent parcel After a Save

To restore a building record to a Parent parcel after a save...

1. Under the **To** column, i.e. location where the building record is located, look for the icon for the Child Parcel that the building record is assigned to.
2. Beside the icon, right click on the Tax Map for the Child Parcel record.
3. Select **Remove Parcel** from the floating menu.



4. At the confirmation screen, click **Yes**.



The *Child Parcel* will be removed and the building record will be restored to the Parent parcel.

Assigning a Multimedia Record

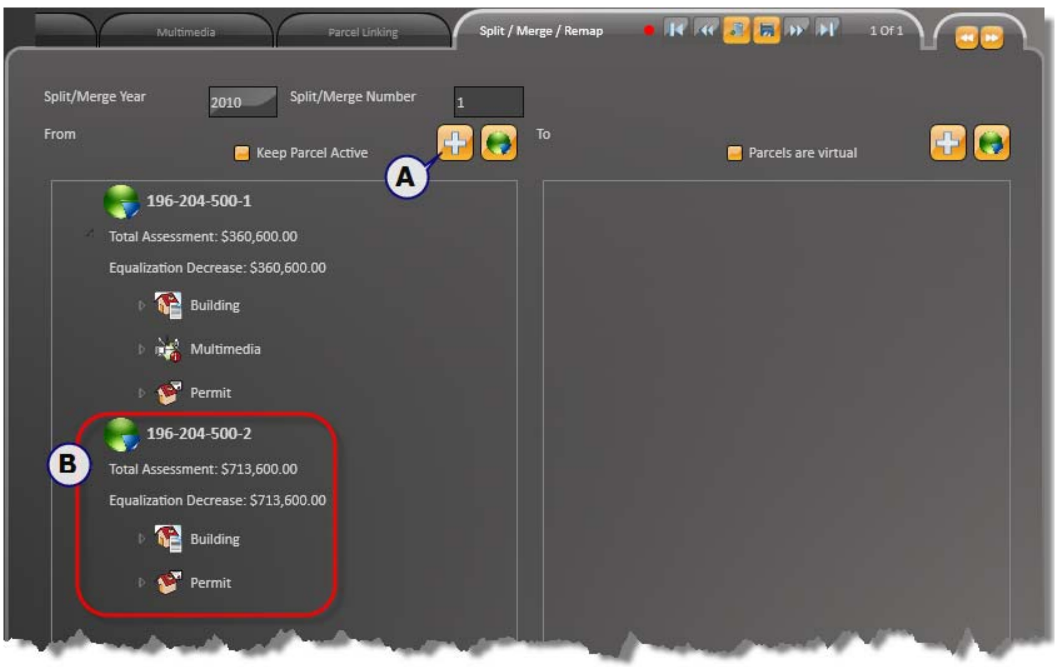
Click the **Multimedia** tab to attach a multimedia record to a building after a Split, Merge or Remap has been performed. *See Adding a Multimedia Document on page 50 for details. To assign a Multimedia record to a Child Parcel, follow the procedures for Assigning a Building Record to a Split / Merge / Remap on page 159.*

Performing a Parcel Merge

In this merge example, two parcels, one a vacant lot, the other containing an office building are to be merged to create a new parcel. The existing building on the second lot will be transferred to the new parcel that is the result of the merge.

To perform a parcel merge...

1. Search for the first parcel that will be merged; click **New** under the *Split / Merge / Remap* tab. The selected parcel will appear under the From column.
2. Under the *From* column, click **Add Source Parcel** (**A**).
3. In the *Search* form, click to select the **By Tax Map** option and perform a search by tax map number; enter the tax map of the parcel that is to be merged.
4. In the *Search Result* pane, double-click to select the parcel; the parcel will be added under the **From** column (**B**).

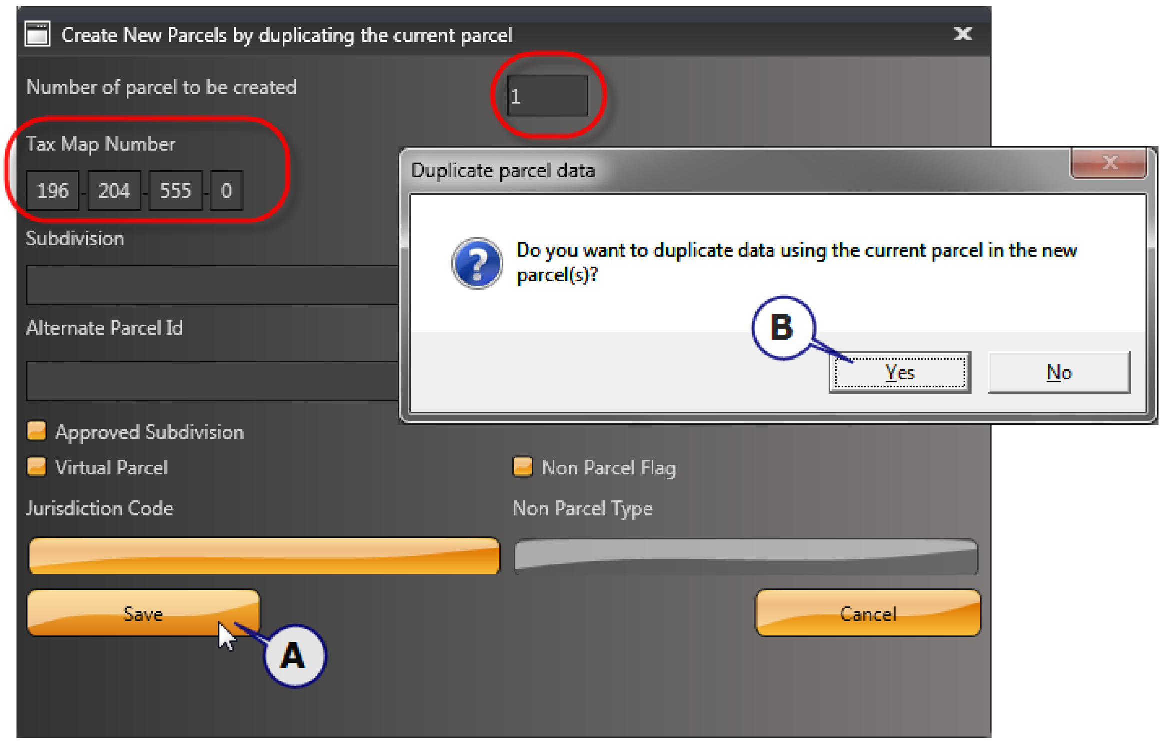


5. Click **Create Destination Parcel** to create the new Parcel.

Note: In the above step, if there is an existing parcel that the two **From** parcels will be merged with, click **Add Destination Parcel**.to select it through the *Search* form.

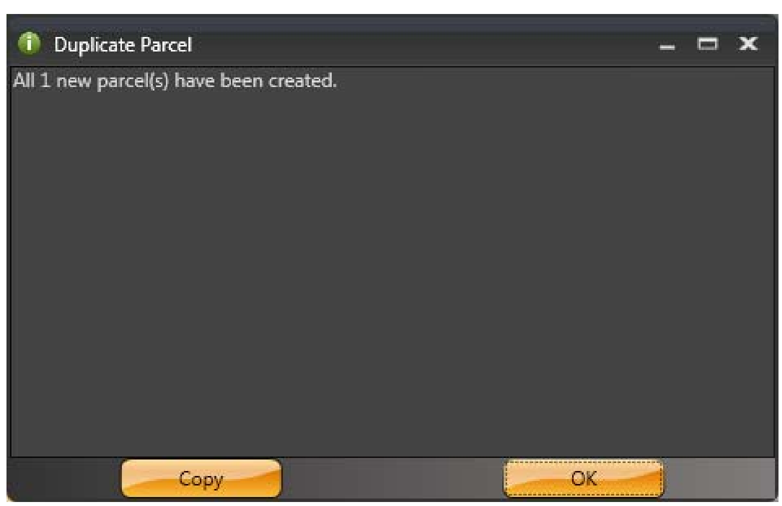
6. In the **Create New Parcels by duplicating the current parcel** form, enter 1 for the **Number of Parcels to be Created** field.

7. Enter the new merged parcel tax map number in the **Tax Map Number** field.



8. Click **Save** (**A**); at the *Duplicate parcel data* confirmation, click **Yes** (**B**).

A final confirmation form is displayed confirming the creation of the new parcel; click **OK** to continue.



Once the new parcel has been created, it will be necessary to transfer the existing building, and any associated records, i.e. Multimedia, Permits, etc, from the old “parent” parcel to the new “child” merged parcel. *Refer to the Assigning a Building Record to a Split / Merge / Remap on page 159 for steps.*

Split / Merge / Remap Drag and Drop Rules

The Drag and Drop Interface

In the *Split / Merge / Remap* drag and drop interface, users are allowed to drag and drop, i.e. “move”, land, buildings, misc. structures, and income data. The following are details about the process when elements are moved through the *Treeview* interface.

Drag and Drop Rules for moving Land

Land may be moved more than once, but the total number of units moved must be the same as the original number of units.

Internally the following will occur in the system...

1. All tables related to the land are updated. (Table: MA_LAND, MA_LD_INFO).
2. The active source income record, (frozen_ID = 0) value is updated to the value of -32766 for all given source land ID.
   - A roll forward is performed on the data, i.e. frozen ID is updated for all existing future years.
   - The Daemon is forced to perform a recalculation.
3. New records are created for the destination land. (Table: MA_LAND, MA_LD_INFO)
   - frozen_ID = 0
   - A new Land ID is generated
   - New units are set with the given unit value
   - A roll forward is performed on the data, i.e. frozen_ID is updated for all records with a future year.
   - The original Land ID is kept in the ORIG_LAND_ID column
   - The *Daemon* is forced to perform a recalculation.

Once a save is performed, the source Land ID is disabled.

Drag and Drop Rules for moving Income

Income can only be moved once.

1. All tables related to the land are updated. (Table: MA_INCOME, MA_INCOME extended tables, MA_LK_INC_FIELD, MA_INC_INFO, MA_INC_SIMULATION)
2. Update active source income record (frozen id = 0), into split merge record (frozen_ID = -32766)
   - A roll forward is performed on the data, i.e. frozen_ID is updated for all existing future years.
   - The *Daemon* is forced to perform a recalculation.
3. Records are duplicated using information from the source parcel and income_ID; a new record is created for the destination parcel.
   - A roll forward is performed on the data, i.e. frozen_ID is updated for all existing future years.

Drag and Drop Rules for moving Parcel linking

Parcel Linking information can be moved more than once.

1. A new record is created; (Table: PC_PARCEL_LINKS).
   - P_ID = Destination Parcel ID
   - EFFECTIVE_YEAR = Split Merge year
   - The *Daemon* is forced to perform a recalculation.

Once saved, the source parcel link can be moved to other parcels so long as the link is still valid.

Note: Users should note that in *Govern v6.0*, the **Source** parcel and the **Destination** parcel **CANNOT** have the same **P_ID**.

Drag and Drop Rules for moving Buildings

The follow are the rules as they apply when using the *Mass Appraisal* (**MA**) system.

1. The the *Building_ID*, and *Sequence* are automatically moved from (Table: MA_INCOME).

2. The *Misc. Structure*, and *Sequence* that is associated with the *Building_ID* are automatically moved from (Table: MA_MISC_STRUCTURES)

Drag and Drop Rules for moving Misc. Structures

1. The active sources' *Misc. Structures* record (frozen_ID = 0) is updated in the split merge record; i.e. (frozen_ID = -32766) in (Table: MA_MISC_STRUCTURES).
   - A roll forward is performed on the data, i.e. frozen_ID is updated for all existing future years.
   - The *Daemon* is forced to perform a recalculation.
2. Records for the destination parcel are duplicated using the information from the source parcel; (Table: MA_MISC_STRUTURES).
   - A roll forward is performed on the data, i.e. frozen_ID is updated for all existing future years.
   - The *Daemon* is forced to perform a recalculation.

Completion of Split / Merge / Remap Transaction flag

Upon successful completion of the Split / Merge / Remap transaction, the transaction completed flag is set to **TRUE**. This will allow the system to set the source parcel to inactive, otherwise the source parcels will always be active.

Property Information - Parcel Genealogy

The Parcel Genealogy / History function is used for viewing *Split/Merge/ Remap* history and maintaining *Split/Merge/Remap* information. This form displays original parcels at the top level and the split and merged parcels on a subsequent levels. All historical data is saved and is unlimited.

To access this form in *Govern*:

1. Open a profile.
2. Double click to select the *Property Information OpenForm* in the *Forms Explorer*.
3. Perform a search and select a record with Split/Merge/Remap history.
4. In the *OpenForm*, locate and select the *Parcel Genealogy* tab.

Parcels are represented by icons, lines between the parcels represent lineage. Genealogy is displayed in an hierarchical fashion, i.e. the parent parcel is displayed as the top level. Splits and merged parcels will be displayed on subsequent levels.

Note: When there is no Parcel Genealogy information, the following message will appear under the tab, **There is no genealogy for this parcel**.

Parcel Genealogy Icon Legend

The following are the possible states of the parcel icons that can be viewed under the *Parcel Genealogy* tab.

Genealogy Icon	Status
	Parcel can be split/merged/remapped, but it is not the current parcel, i.e. is not selected
	The is the active Parcel and can be split/merged/remapped; this is the selected parcel.
	This is an **Inactive** parcel but can be selected for information.
	This Parcel is selected, i.e. the current parcel, but it is **Inactive**.

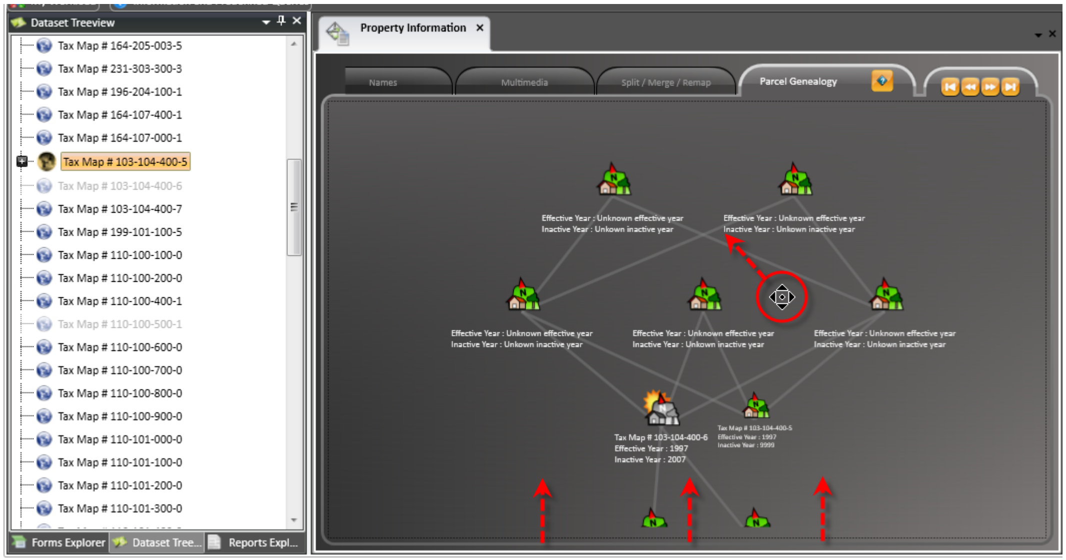
Scrolling Over the Parcel Genealogy area

Depending upon display area, it may be necessary to scroll over the Parcel Genealogy area.

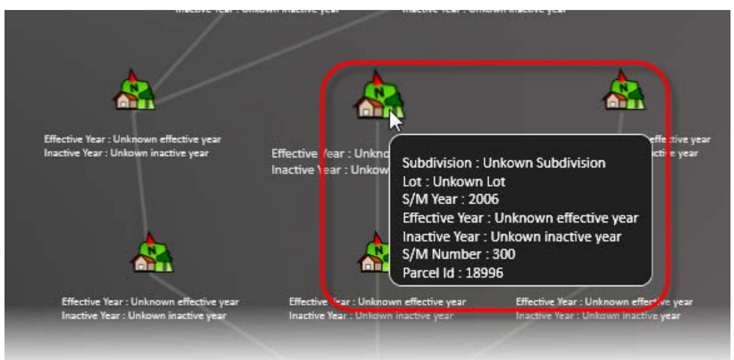
To scroll over the area...

1. Place your cursor over an area without an icon; click and hold the *Left Mouse Button* (**LMB**).

2. When the scroll icon appears, drag the mouse to scroll over the area.



Viewing Parcel Details



To view the details of the parcel:

1. Place the mouse cursor over the icon representing the parcel.
2. The details of the parcel will be displayed in a a block beside the icon.

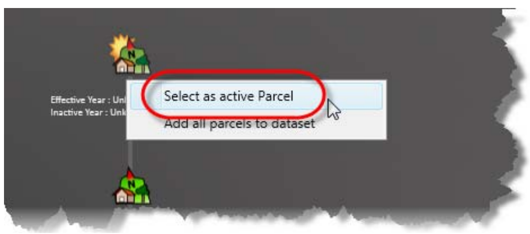
Parcel Detail information

The following are the information parameters that are displayed in parcel details.

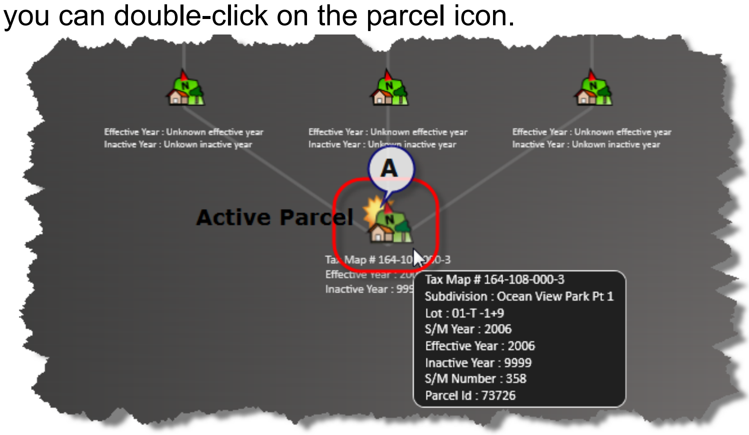
- **Subdivision -** Displays the parcels subdivision when applicable.

- **Lot** - Parcel Lot Number.
- **S/M Year** - This is the year that the *Split / Merge / Remap* occurred
- **Effective Year** - The parcel is active as of this indicated year.
- **Inactive Year** - This is the year that the parcel will become inactive, by default, this value is 9999.
- **S/M Number** - This number indicates the number of times that the parent parcel has been split.
- **Parcel ID** - The selected parcels *Parcel ID.*

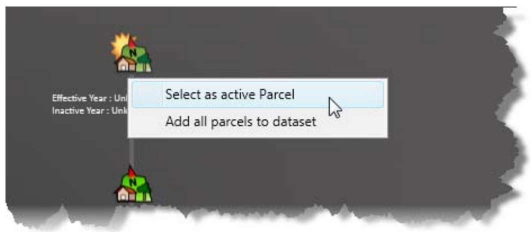
Setting a Parcel as Active: Right-click on a parcel icon, and select **Select as active parcel** from the floating menu.



The selected parcel becomes the *Active Parcel*. The active parcel is indicated by an icon with a **star burst** in the upper left hand corner (**A**). Alternatively, you can double-click on the parcel icon.



Adding All Parcels to the Treeview: Right-click on a parcel icon, select **Add all parcels to Dataset** to add the parcels displayed under the genealogy tab to the Dataset Treeview..

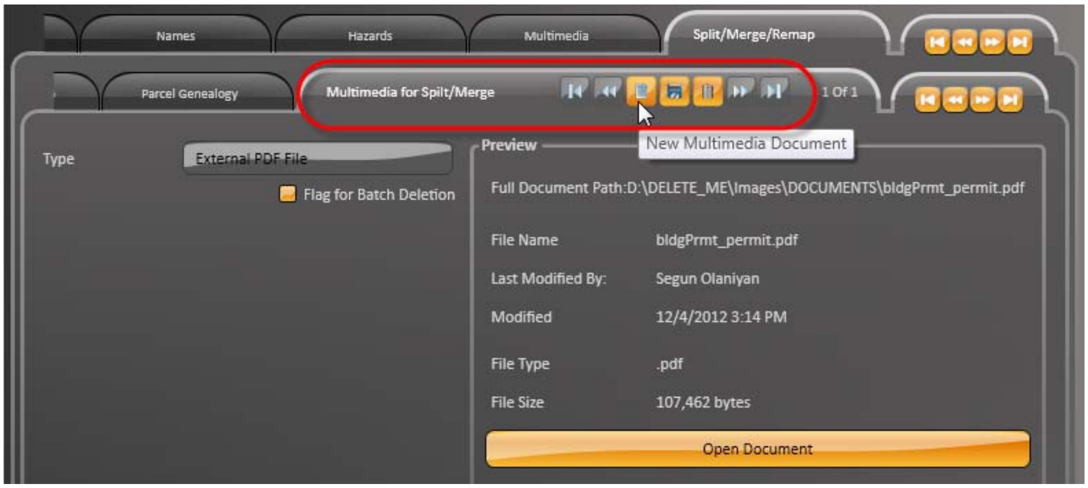


Split / Merge / Remap Historical Data and Storage

All Split/Merge Historical data is saved in the two following tables, (Table: **PC_GEN_SAVED_SRC**) and (Table: **PC_GEN_SAVED_DEST**)

Table	Column	Type	Details
PC_GEN_SAVED_SRC			Table used to save source data
	AUTO_ID	(int, not null)	
	REF_ID	(int, not null)	
	REF_SEQ	(smallint, null)	
	REF_TYPE	(varchar(50), not null)	
	SM_NO	(int, not null)	
	SM_YEAR	(smallint, not null)	
	P_ID	(int, not null)	
PC_GEN_SAVED_DEST			Table used to save destination data
	AUTO_ID	(int, not null)	
	REF_ID	(int, not null)	
	REF_SEQ	(smallint, null)	
	P_ID	(int, not null)	

Multimedia for Split/Merge



The Multimedia for Split/Merge tab allows you to link a multimedia document with the current record. This document could be a title deed, image, the copy of an agreement, etc. A Multimedia link in the Govern system is established with the *Parcel ID* (**P_ID**), or Name ID (**NA_ID**). in the case of the *Multimedia for Split/Merge* the link is through a *Multimedia ID* (**MULTIMEDIA_ID**).

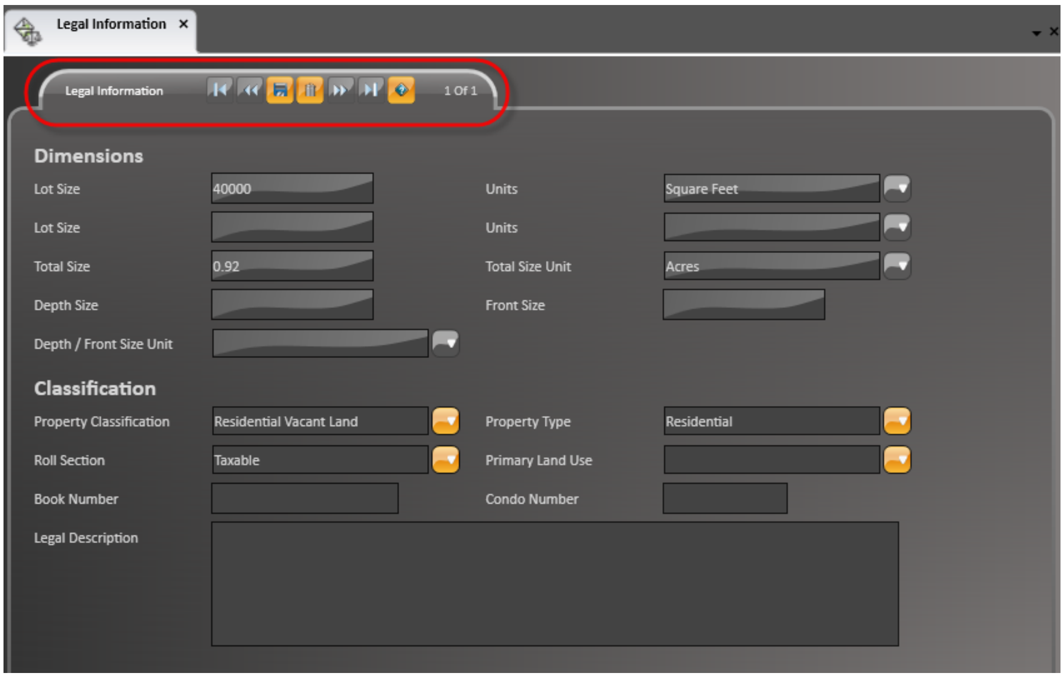
The link to the Multimedia document is made after the Split/Merge/Remap process. All configured multimedia documents are supported, and establishing a link to the documents is in the same manner as described in *Adding a Multimedia Document on page 50* of this guide.

To add a Multimedia document to a Split/Merge/Remap process...

1. Select a parcel that is to be split; perform a Split/Merge/Remap process.
2. Click **Save Split/Merge** to save the record.
3. Select the *Multimedia for Split/Merge* tab.
4. Click the **New Multimedia Document** button.
5. Follow the steps described in this guide, *Adding a Multimedia Document on page 50*.

When linked, all parcels that were generated during the split/merge process will have a link to the Multimedia document. Additional documents may be appended to the current documents and the links will continue for all parcels involved in split/merge process.

Legal Information



Overview

The *Legal Information* form is used for setting up and maintaining legal information, including lot size, property classification, property type and land use. Unlimited space is provided for adding legal description notes and comments. As with all *Property Control* forms, the *Legal Description* form is linked to the GIS application. When you select a parcel on the map application, the legal information is available.

Note: Each property record can have only one legal description. This information is saved by year.

Note: The **Lot Size**, **Total Size**, **Front Size** and **Unit** fields are enabled only for clients who do not have the Mass Appraisal module. If you have the Mass Appraisal module, this information is entered through the *Land Information* function.

Two fields are provided for entering the lot size. Typically, this is for properties that have divided land use.

Legal Information tab Parameters

Dimensions group

Lot Size: Enter the lot size. Use both the left and right fields if required. A different unit of measurement can be used for each; for example, acres and square feet.

Total Size: This field displays the total size of the parcel.

Units: The total size is always displayed in acres (User Validation Table: LUNIT).

Front Size: Enter the frontage of the parcel.

Depth Size: Enter the depth of the parcel.

Unit: Select a unit, for calculation purposes, from the drop-down list (User Validation Table: LUNIT).

Classification group

Property Classification: You must select a property classification from the drop-down list (User Validation Table: PUSE).

Property Type: Select a property type from the drop-down list (User Validation Table: PROPTYPE).

Roll Section: Select the assessment division or *Roll Section*, from the drop-down list (User Validation Table: ROLLSECT).

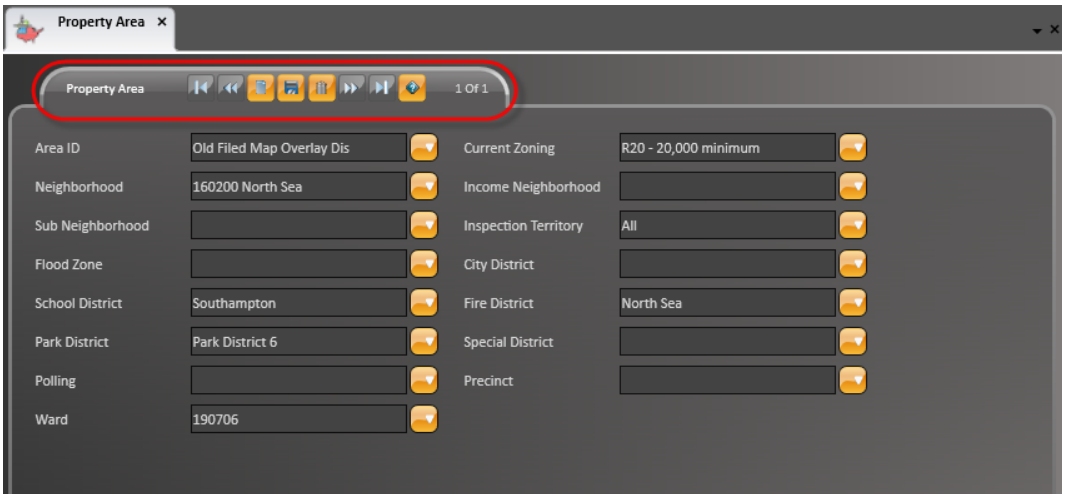
Primary Land Use: Select a primary land use from the list box (User Validation Table: LUSE).

Book Number: Select a **Book Number** from the drop-down list for this mandatory field. The *Book Number* is used by the tax modules as the prefix for the bill numbers (User Validation Table: BOOKNO).

Condo Number: The condo number is used to enter a number designated for the unit. (User Validation Table: PC_LEGAL_INFO)

Legal Description: This field provides unlimited space for adding notes and comments to the legal description. (User Validation Table: PC_LEGAL_INFO)

Property Area



Overview

The *Property Area* form is used for setting up and maintaining information on the area where the property is situated.

Note: If the information is to be referenced by *Govern's Mass Appraisal* module, it MUST be stored in the first record.

All geographic information can be updated from this form. This can include information for zoning, restrictions, school, city and fire districts. You can define your own area IDs, neighborhoods and sub-neighborhoods for appraisal purposes. An *Inspection Territory* that will be used in the automatic inspection scheduling option can also be entered on this form. *For more information on Inspection Territories, refer to the Permits & Inspections guide*. Click the **Property Information** tab in the *Property Information* profile to access this form.

Property Area Tab Parameters

Area ID: Select the area identification from the drop-down list (User Validation Table: AREAID).

Current Zoning: Select the current zoning from the drop-down list. This field is mandatory (User Validation Table: ZONING).

Neighborhood: Select the Neighborhood Code from the drop-down list (User Validation Table: NBHD or NEIGHBOR)

Note: By default, this field is linked to VT_USR_NEIGHBOR. If you are using Govern's Mass Appraisal system, change the link to VT_USR_NBHD, using *Field Setup* Mode. *Refer to the Super User guide for details*.

Income Neighborhood: Select the Sub Neighborhood Code from the drop-down list (User Validation Table: NEIGHSUB).

Sub Neighborhood: In the drop down menu, select the sub neighborhood designation, e.g. *Commercial* or *Residential.* (Table:NEIGHSUB)

Inspection Territory: Select the inspection territory from the drop-down list. This field is mandatory if you wish to create Inspection schedules since it is used in the inspection and automatic inspection scheduling function (User Validation Table: INSPTER).

City District: Select the city district from the drop-down list (User Validation Table: CITYDS).

School District: Select the school district from the drop-down list (User Validation Table: SDIST).

Fire District: Select the fire district from the drop-down list (User Validation Table: FIREDS).

Park District: Select the park district from the drop-down list (User Validation Table: PARKDS).

Special District: Select the special district from the drop-down list (User Validation Table: SPECDS).

Precinct: Select the precinct from the drop-down list (User Validation Table: PRECINCT).

Polling: Select the Polling ID from the drop-down list (User Validation Table: POLLING).

Flood Zone: Select the Flood Zone from the drop-down list (User Validation Table: FLDZONE).

Ward: Select the Ward from the drop-down list (User Validation Table: WARD).

Parcel Linking

Overview

The *Parcel Linking OpenForm* is used for linking a group of parcels. When combined with the *Mass Appraisal* module, a group of parcels can be assessed and assigned values based on total area rather than on a per parcel basis. For example, when using this function for the management of a condominium complex, you can define the complex as the master parcel and link each unit to it. When linked you can enter a percentage value for each unit, then use the *Appraisal Linking* option to calculate the values. Alternatively, you can enter a value and a percentage for each unit and use this option to calculate the value of the master parcel.

To access this form, use the Search to open a record...

1. In the *Property Control Profile*, double-click on the *Parcel Linking* Open-Form.

Parcel Link Summary tab Command buttons

Creating a New Parcel Link Record: Click **New** to create a new *Parcel Link* record.

Saving a New Parcel Link Record: Click **Save** to save a new *Parcel Link* record or any modifications done on an existing one.

Deleting a Parcel Link Record: Click **Delete** to remove the current record from the Database.

Note: You cannot delete a parcel link record if the Parcel is linked with other parcels (Table: PC_PARCEL_LINKS), or the Parcel is linked to a building (Tables: PC_LK_PARCEL_BLDG and PC_LK_BLDG_TO_BLDG)

Browsing Parcel Link Records: Click **Browse** to view existing parcel link records.

Parcel Link Summary tab parameters

Link Type: Select a value from the drop-down list to define the type of parcel, such as condominiums, town house, development or non-parcel. (User Validation Table: LK_TYPE)

Appraisal Link option

Appraisal Link: Select this option to automatically assign appraisal values to the linked parcels. Appraisal values are provided only if you have the Mass Appraisal module. (User Validation Table: PC_PARCEL_LK_TYPE)

Validation Rules for Appraisal Linking

When the **Appraisal Link** option is selected, you cannot have more than one link in the same fiscal year. Optionally you can have a link between a non overlapping period in the same fiscal year. For example, one link can be to a parcel that is valid between January 1, and June 30, and another that is valid between July 1, and December 31 of the same fiscal year.

If the **Appraisal Link** option is not selected, users can link to an unlimited number of parcels.

Value On: Select an option to assign the appraised value from the master parcel to the linked parcels:
(User Validation Table: VALUEON)

- **All**: from the *Land*, *Building* and *Miscellaneous Value* fields on the Property Information (Mass Appraisal) form.
- **Improvement Only**: from the *Building Value* and the *Miscellaneous Value* fields on the Property Information (Mass Appraisal) form.
- **Land Only**: from the Land Value field on the *Property Information* (*Mass Appraisal*) form.

From Date: Enter the date that the link will be effective from. (User Validation Table: PC_PARCEL_LINKS)

End Date: Specify the date after which the link will no longer be effective. (User Validation Table: PC_PARCEL_LINKS)

Effective Year: This field displays the year that the link is effective or becomes effective. By default, this is the default fiscal year for the department. To change, this value, enter an alternate year.
(User Validation Table: PC_PARCEL_LINKS)

Inactive Year: This field displays the year that the link becomes inactive. By default, this is 9999. To change this value, enter an alternate year.
(User Validation Table: PC_PARCEL_LINKS)

Linked Parcels tab Command buttons

Adding a New Parcel Link Record: Click **Add Link** to add a new *Parcel.*

Saving a New Parcel Link Record: Click **Save** to save the *Parcel Link*.

Deleting a Parcel Link Record: Click the linked record to highlight it; click **Delete** to remove the current record from the Database.

Setting a Master Parcel: When a link record has been created, but no parcels have been linked, by default the current parcel is defined as the Master Parcel. To change this information, click in the field and click **Set As Master Parcel**. When the parcel has been established as the *Master Parcel*, a "**-1**" is displayed under the *Master Parcel* column in the grid.

Sending the Parcel to the Treeview: Highlight a linked parcel in the grid and click **Send Parcel to Treeview** to make it a part of the dataset in the treeview.

Linked Parcels tab column headings

Master Parcel ID (PID): When a parcel is designated as a Master Parcel, it can have its link information modified. When a link record is created, by default the current parcel is defined as the *Master Parcel* and **-1** is displayed in this field.

Tax Map Number: This field displays the tax map numbers of all the parcels linked in the current record.

Effective Year: This field displays the year that the link is effective or becomes effective. By default, this is the default fiscal year for the department. To change, this value, enter an alternate year.

Inactive Year: This field displays the year that the link becomes inactive. By default, this is 9999. To change this value, enter an alternate year.

From Date: This is the date that the link will be effective from.

End Date: This column displays the date that the link will no longer be effective after.

Percent of Total: Enter a value for the percentage of the total rates to be assigned to the specific parcel.

Appraised Linking: This field displays the appraised value of all the parcels in the record if the *Appraisal Linking* option is selected on the General tab and if you are using the *Mass Appraisal* module.

Creating a Parcel Linking Record

To create a new *Parcel Linking* record...

1. In the Property Control profile, open the *Parcel Linking OpenForm*.
2. Search for a parcel.
3. Click **New** on the *Parcel Link Summary* tab.
4. Select a *Link Type*; complete the required parameters.
5. Click **Save**.

A new parcel linking record will have been created in the system.

Modifying an Existing Parcel Linking Record

To modify an existing *Parcel Linking* record...

1. On the *Parcel Link Summary* tab verify the record being modified.
2. Modify any of the required fields.
3. Click **Save** to save your changes.

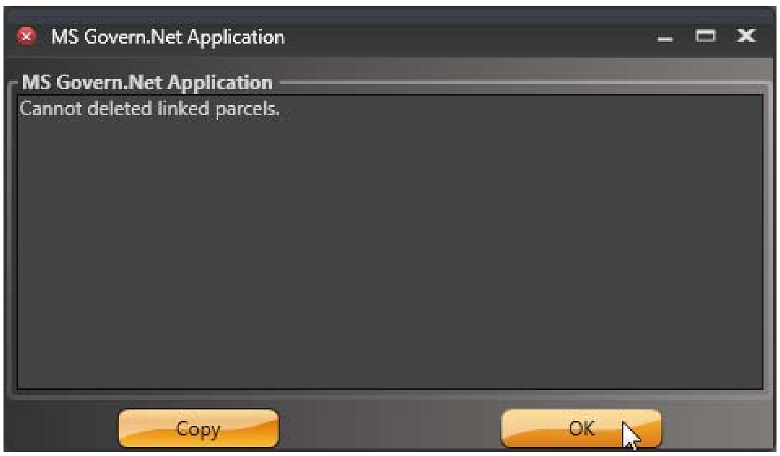
Deleting an Existing Parcel Linking Record

Note: In order to delete a record, ensure that there are no links to the record other than the *Master Parcel*.

To delete an existing parcel linking record...

1. On the *Parcel Link Summary* tab verify the record being deleted.
2. Click **Delete** to delete the record.
3. At the confirmation screen, click **Yes**.

4. If the following screen is displayed, click **OK**; click the *Linked Parcels* tab and remove any linked parcels.



Assigning Appraisal Values to the Linked Parcel

Note: In order to obtain appraisal values, the Mass Appraisal module must be installed.

To assign appraisal values to the linked parcels, follow the procedures for linking a parcel, *see Creating a Parcel Linking Record above*. After step 2, ...

1. Click to select the **Appraisal Link** checkbox; the *Value On* field will become available for selection.

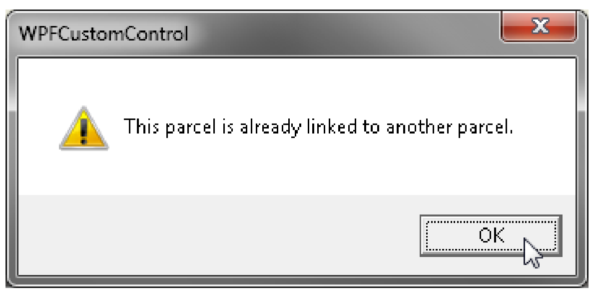
Note: When the Appraisal Linking checkbox is selected (User Validation Table: **PC_PARCEL_LK_TYPE**), the system enables the *Link Value On* drop down menu; the **All** option is selected by default.

2. In the *Value on Field* drop down menu, select an option to assign the appraised value from the master parcel to the linked parcels.
3. Click **Save**.

Linking Additional Parcels to the Record

Click to select the *Linked Parcels* tab to create a link to a parcel record...

1. Click **Add Link** on the *Linked Parcels* tab; this opens the *Search* screen.
2. Enter your search criteria on this screen and click **Search** to add an existing parcel.
3. Select the parcel; if the parcel is already linked, you will see an error screen.



4. Click **OK**; select another parcel that is not linked.
5. Complete any required parameters, i.e. *From Date*, *End Date*, etc.

The linked parcel is now saved in the system.

Making a Linked Parcel the Master Parcel

When a linked parcel is set as the *Master Parcel*, you can modify its link information under the *Linked Parcel* tab.

To make one of the linked parcels the *Master Parcel*:

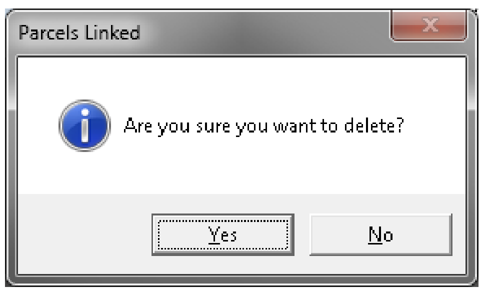
1. Select the parcel in the list.
2. Click **Set As Master Parcel** on the *Linked Parcel* tab. A confirmation message appears.

When the parcel is set as the *Master Parcel*, its link information will be displayed under the *Parcel Link Summary* tab. As a result it also becomes the active parcel in the Dataset Treeview pane.

Removing a Link to a Parcel

To remove a link to a parcel:

1. Under the *Linked Parcel* tab, select a linked parcel in the list.
2. Click **Remove Link**.
3. At the confirmation screen, click **Yes**.



The link to the parcel will be deleted from the grid.

Workflow

Overview

A workflow can be described as the combined steps of any work process, from printing bills to completing end-of-year procedures. It can include batch processes, administrative procedures and reports. They can be added to a queue in the order they need to be completed and users that need access permissions can be defined.

Workflow - General tab

The Workflow OpenForm is used for tracking workflows by property. You can define customized types and create a list of activities for each type. Activities can be set up to generate messages to other departments, inspection requests, etc.

Workflow - General tab command buttons

Creating a Workflow Record: Click New to clear the form and create a new record. You need to select the type from the Type drop-down list and the date from the Request Date field. The other fields are optional.

Creating a Workflow Record: Click New to clear the form and create a new record. You need to select the type from the Type drop-down list and the date from the Request Date field. The other fields are optional.

Saving a Workflow Record: Click Save to save the new record or any modifications made to an existing one.

Deleting a Workflow Record: Click Delete to remove the current record. A confirmation message is displayed.

Browsing Workflows: Click Browse to view a list of the complaints, requests for services, workflows or grievances for the current property.

Browsing Workflow History: To browse through the workflow history click History.

Workflow - General tab parameters

Type: Select a type from the drop-down list (Table: VT_USR_ COTYPE). Request Date: Double-click in the field and select the request date from the pop-up calendar. By default, the current date is displayed.

Reference Number: The Reference Number is automatically generated as defined on the Land Management Parameters form for the organization or the Permit Parameters for the department.

Request Date: Enter the date the grievance, complaint, request for service or workflow was initiated. By default, the current date is displayed in this field.

Start Date: You can define a starting date for a workflow. This starting date can be generated automatically from an activity, as defined on the Activities (Workflow Functions) form in Govern Admin, or entered directly on the Workflow function.

Expiration Date: You can define an expiration date for a workflow. Like the Start Date, the expiration date can be generated automatically from an activity or entered directly on the Workflow function.

Status: Select the status from the drop-down list (Table: VT_USR_STATCOMP).

Priority: Select the priority of the workflow item (Table: VT_USR_ PRIORITY); available options are:

- Low
- Normal
- Urgent.

Total Fee: This field displays the total of the calculated fees.

Last Fee: This field displays the last calculated fee. You can override this amount if the Allow Fee & G/L Override option is selected on the Permits / Activity Steps form in Govern Admin. When you enter an amount and click Save, the Fee Distribution Override screen is displayed.

Workflow - Notes & Response tab parameters

Notes & Comments: Use this field to enter any notes or comments that are related to the record.

Workflow - Activities tab

The Activities OpenForm is used to maintain information on each step of the workflow process. The steps are pre-defined in Govern Admin. The steps can include everything from the original request, an acceptance of an application, reminders, issuing of certificates, or licensing. See Permit, Offense and Workflow System Activities in the Permits and Licenses 10.7 user guide for details on defining activities.

Workflow - Activities tab Command Buttons

Browsing an Activity

Click **Browse** and select a type from the list.

Removing an Activity

Click Remove to delete the current Activity record from the database.

Note: Only users with full user rights to this function have access to this button.

TIP: Removing an Activity record or changing the status of an activity step automatically removes the following:

- Inspection entries (if generated by this activity)
- G/L Transaction entries, Fees (if generated by this activity)
- Permit Number (if issued by this activity)
- Hearing entries (if generated by this activity)
- Messages: A new message is sent to the users and clients who received the previous message
- E-mail: A message is sent to the users and clients who received the previous message
- Entries from reports

Depending on the setup in *Govern Admin*, you can perform the following from the Activities function:

- Initiate an activity, see *Initiating an Activity on page 196*
- Complete an activity, see *Completing an Activity on page 196*

- Modify the messages generated from an activity step, see *Modifying Messages on page 198*
- Modify the e-mails generated from an activity step, see *Modifying Messages on page 198*
- Modify the activity types to be performed from the activity, see *Modifying Inspection Types on page 200*
- Add a multimedia document, see *Adding a Multimedia Document on page 50*

Workflow - Activities tab parameters

The Activities OpenForm is used to maintain information on each step of the workflow process. The steps are pre-defined in Govern Admin. The steps can include everything from the original request, an acceptance of an application, reminders, issuing of certificates, or licensing. See Permit, Offense and Workflow System Activities in the Permits and Licenses 10.7 user guide for details on defining activities.

Initiating an Activity

To initiate an activity:

1. Select the activity in the grid.
2. Click Initiate. The Starting Date screen appears with the current date displayed by default.
3. Enter a starting date or use the default. This date is displayed in the *Date Started* field beside the activity step in the grid.

Note: Once a new step has been initiated, previous steps cannot be modified.

TIP: To select multiple activities at the same time, select the first applicable activity; then, hold down the Shift key and select on the last.

Completing an Activity

To complete an activity:

1. Click **Complete**. The *Activity Completion* Input screen appears.

2. You can change the status of the activity step if the right access has been granted by the system administrator. Click **Yes**, **No**, **Restart** or **Special - User Defined**, if applicable. *See Defining an Activity Status in the Permits and Licenses Release 10.7 user guide*.
3. Enter the Completion Date or use the default.

Renew and Auto-Complete a Process

The basis of the Activity function is to allow you to setup a series of steps that are executed sequentially. The steps within your process equate with actions required for the various stages of your process. Below we see an activity used to Issue a Permit, and Print a License.

When a renewal request is made for this process, the process of initiating and completing the steps can be tedious when there are multiple requests. Selecting the **Renew** button will automatically prompt the user with the option to load a selected activity, initiate, and complete the required steps. Any options in the form of user prompts required for fulfilling the steps are displayed as usual. Activity steps that include fee calculations, printouts, etc. will also be executed.

Activities Columns

Step: The purpose of the *Step* column is to serve as a header for a block of activities. The column displays the step number of the activity. In the event that the activity consist of multiple steps, a blank space will appear beside the step. This space allows you to add detailed descriptive information. If no descriptive information is entered, by default the sequence number is used.

Target Date / Total Time Spent: It is possible to set a Target Date and a Total Time Spent for an Activity.

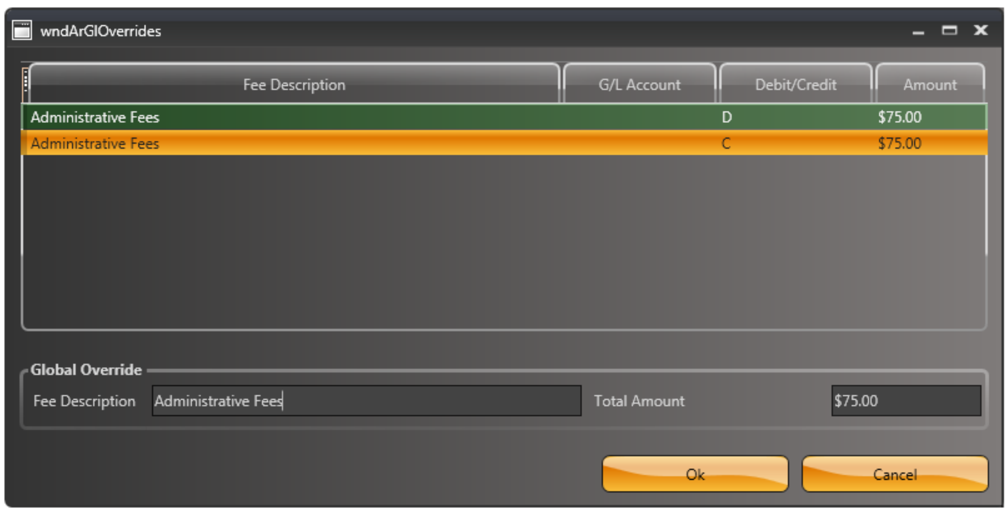
To enter a *Target Date* and/or *Total Time Spent* for an activity:

1. On the *Activities* form, use the horizontal scroll bar. Click once in the *Target Date* column to view the *Total Time Spent* and *Target Date* columns.
2. umn to type in a date, or double-click in the same column to display a calendar.
3. Select a date from the calendar.

Modifying Fees

The *Fee Distribution Override* form is displayed when you click **Initiate** or **Complete** for an Activity Step with an associated fee. The following conditions apply:

- If the Allow Fee & G/L Override option is selected on the Land Management Parameters form in Govern Admin, you can modify both the fee and description on the Fee Distribution Override form.
- If the Allow Fee & G/L Override option is deselected, you can only modify the fee description on the Fee Distribution Override form.
- If the Link to A/R option is selected on the Land Management Parameters form, you can specify the G/L Account and the A/R Class Code.



Modifying Messages

You can modify a message according to the setup in Govern Admin:

- If the *Dynamically Modify User List* option is selected on the *Activities Messaging Setup* in *Govern Admin*, the *Message User List* screen is displayed and you can modify the recipient list.

Activity: This field displays the Activity Step for the message.

Available Users: This text box lists all the users in the system.

Chosen Users: This field displays the users who will receive the message.

Add-->>: Select a user in the Available Users list and click Add-->> to move the user to the Chosen Users list.

<<--Remove: Select a user in the Chosen Users list and click <<--Remove to move the user to the Available Users list.

Exit: Click Exit to close the form.

- If the Dynamically Modify Custom Text option is selected on the Activities Messaging Setup in Govern Admin, the Notify User — Message Information screen is displayed and you can modify the existing message or compose one.

Activity: This field displays the Activity Step for the message.

Custom Text: This field displays the original message to be sent to the user, group or department.

Exit: Click Exit to close the form.

Modifying the Message: Modify the message directly in the Custom Text box and click **OK**.

- If the Dynamically Modify User List option is selected on the Notify Client by E-mail screen in Govern Admin, the Message User List screen is displayed and you can modify the recipient list.

Activity: This field displays the Activity Step for the message.

Available Names: Select names from the Available Users list and click to move them to the Chosen Users list. The Chosen Users will receive the message.

Chosen Names: This field displays the users who will receive the message.

Add-->>: Select a user in the Available Names list and click Add-->> to move the user to the Chosen Names list.

<<--Remove: Select a user in the Chosen Names list and click <<--Remove to move the user to the Available Names list.

Exit: Click Exit to close the form.

- If the Dynamically Modify Message Text option is selected on the Notify Client by E-mail screen in Govern Admin, the Message Text screen is displayed and you can modify the existing message or compose a new one.

Activity: This field displays the current Activity Step selected for the message.

Custom Text: This field displays the message that will be sent to the user, group or department.

Modifying the Message: Modify the message directly in the Custom Text text box and click OK.

Exit: Click Exit to close the form.

Modifying Inspection Types

- If the *Prompt Types in Activities* option is selected on the *Permit System Activities* in *Govern Admin*, the *Inspection Types* screen is displayed and you can modify the type of inspection to be performed from the activity step.

Activity Description: This field displays the Activity Step for the process.

Available Types: This field displays the Inspection Types that have been defined in Govern Admin.

Chosen Types: This field displays the process Types selected in Govern Admin.

Add-->>: Select a user in the Available Types list and click Add-->> to move the user to the Chosen Types list.

<<--Remove: Select a user in the Chosen Types list and click <<--Remove to move the user to the Available Types list.

Exit: Click **Exit** to close the form.

Note: Inspections can be automatically scheduled through Outlook at the initiation or completion of any activity step. *See the Offenses section of the Permits & Licenses release 10.7 user guide for details*.

Workflow - Linked Names tab

The Linked Names tab is used to include all names that are associated with the record.

Linked Names tab - Command Buttons

Add: Click Add to add a name to the list of names that are associated with the claim.

Remove: To remove a name from the list of names, click to select the name; click Remove.

Linked Names tab - Parameters

The following columns appear under the Linked Names tab.

NA_ID: This column displays the NA_ID of the current line record.

Name: The Name column displays the name of the current line record.

Workflow - Links tab

With the Links tab, you are able to link other records to the current selected account. Records include the following:

- Parcels
- Departments
- Buildings
- Permits / Offenses / Workflows
- Inspections
- Hearings
- Utility Billing
- Misc. Billing
- Project Folios
- Self-Reported Tax

To link a record in *Govern*...

1. Perform a search and select a record.

2. In the Workflow OpenForm, click Functions; select the Self-Reported Tax - Account Maintenance function.
3. In the Account Maintenance form, click the Links tab.
4. Click Add to select any one of the aforementioned records or codes.

To remove a record or code, click to highlight the information that is to be deleted; click Remove.

Conditions and Events

The Conditions and Events feature allows you to keep track of events that occur in the Permits, Offense, and the Complaints/Greivance Workflow. Unlike activities, there is no validation, and as a result the events being tracked are not linked. When the feature is configured in Govern Admin, two (2) dividers are displayed in the OpenForm. The admin component of this feature requires the creation of Divisions, Conditions, Categories, and Status codes. Setup codes are stored in the following tables (Table: PM_CONDITIONS_CODES, PM_EVENT_CODES). *Refer to the Conditions and Events Setup section of the Permits and Licenses release 10.7 user guide for setup details.*

Workflow - Conditions tab

The Conditions tab will display, and allow you to add a list of conditions to the Conditions grid.

Conditions tab Parameters

Date: This column will display the date that the condition is entered. By default the date used is the system date, but this date can be modified.

To modify the Condition date...

1. Click to select the cell containing the date that you would like to modify.
2. Highlight the date and then enter a new date in the MM/DD/YYYY format; alternatively, after highlighting the date, double-click in the cell to display a calendar.
3. Select a date.

Division: When a condition has been entered, this column will display the division information for the condition. (Table: VT_USR_PMDIVIS) Category: This column displays the category of the selected condition. (Table: VT_USR_PMCONDCA)

Condition: The information displayed under this column refers to the name of the condition. (Table: VT_USR_PMCOND)

Condition Description: This is the description of the condition. (Table: VT_USR_PMCOND)

Condition Type: Refers to the classification of condition, i.e. a subcategory of the condition. Click on the cell below the Condition Type column to display the drop-down menu with options of types. (Table: VT_USR_PMCONDTY)

Condition Status: Click on the cell below the Condition Status column to display the drop-down menu containing the choices available for the status.

Notes & Comments: Double-click on the cell in the grid to display the Notes & Comments form; enter any information that is relevant to the condition.

Condition tab Command Buttons

Add: Click Add to add a new condition to the grid. The Select Condition form is displayed.

Adding a Condition

To add a Condition...

1. Click Add to display the Select Condition form.
2. Select a Division from the drop-down menu.
3. Choose a Category.
4. When available, the Available Conditions column will display a list; click to select the conditions that you would like to add.
5. When Available Conditions are selected, click Select-->>, to add them to the Selected Conditions list.

Alternatively, if you need to remove a condition from the Selected Conditions column, select it and click <<--Remove.

Removing a Condition

To remove a Condition...

1. Click to select one of the cells of the line of the condition that is to be deleted.
2. Click Remove; a confirmation screen will appear.
3. Click Yes.

Workflow - Events tab

The Events tab will display and allow you to add to a list of events in the Events grid.

Events tab Parameters

Division: When an event has been entered, this column will display the division information. (Table: VT_USR_PMDIVIS)

Category: This column displays the category of the entered event. (Table: VT_USR_PMEVENTC)

Event Code: This field contains the code of the event.

Description: This is the description of the condition.

Date Started / Completed: These columns will display the date that the event was started / completed. By default the Started date used is the system date, but this date can be modified; the Completed date is entered manually.

To modify the Started / Completed dates...

1. Click to select the cell containing the date that you would like to modify.
2. Highlight the date and then enter a new date in the MM/DD/YYYY format; alternatively, after highlighting the date, double-click in the cell to display a calendar.
3. Select a date.

Reminder Date: If required, you can enter a reminder date for the event.

To add the Reminder date...

1. Click to select the cell containing the date that you would like to modify.
2. Highlight the date and then enter a new date in the MM/DD/YYYY format; alternatively, after highlighting the date, double-click in the cell to display a calendar.

Disposition: Refers to the type of disposition of the event. Click on the cell below the Disposition to display the drop-down menu with options of codes. (Table: VT_USR_PMEVENTD)

Assigned To: Click on the cell below the Assigned To column to display the drop-down menu containing users that the event can be assigned to

Notes & Comments: Double-click on the cell in the grid to display the Notes & Comments form; enter any information that is relevant to the condition.

Events tab Command Buttons

Add: Click Add to add a new event to the grid. The Select Event form is displayed.

Adding an Event

To add an Event...

1. Click Add to display the Select Event form.
2. Select a Division from the drop-down menu.
3. Choose a Category.
4. When available, the Available Event(s) column will display a list; click to select the Events that you would like to add.
5. When Available Event(s) are selected, click Select-->>, to add them to the Selected Event(s) list.

Alternatively, if you need to remove an event from the Selected Event(s) column, select it and click <<--Remove.

Removing an Event

To remove an Event...

1. Click to select one of the cells of the line of the condition that is to be deleted.
2. Click Remove; a confirmation screen will appear.
3. Click Yes.

The Conditions and Events feature is a quick and convenient method of entering information that does not require validation.

Workflow - Multimedia tab

Note: Note: The activity step must be initiated before you can link a multimedia document to it.

To link a secondary file, such as a scanned document, an image, video or audio file to an activity step, *refer to Adding a Multimedia Document on page 50*

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