MSGovern

Super User

Release 10.7 Version 1.0
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FINAL DRAFT

MS Govern

Super User

Govern for Windows^{TM} Version

Version: 1.0

This edition reviewed by

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Disclaimer

MS 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 MS Govern to the customer.

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Preface

Welcome to Govern for Windows, 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)

- Appeals & Grievances
- Appraisals / Property Valuations
- Comparables Sales Management

Financial Management

- Account Receivable
- Cash Collection

Land Management

- Business & Individual Licenses
- Complaint Tracking
- Leasing
- Permit Tracking & Inspection Scheduling
- Planing
- 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: Super User

📖 Overview

The *Super User* guide is intended for users with Super User privileges, often these individuals are designated as Administrators. It describes all the procedures which are normally performed by the Super User after completing the installation and setup as described in the *Getting Started* guide.

This guide is divided into three (3) chapters:

- *Govern Admin*, describing the administrative procedures and setup.
- *Govern*, describing how to customize the Govern User Interface.
- *Govern Batch Processing*, describing the batch processes which are normally performed by a Super User or system administrator.

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What's New

NEW This section lists the new features in Govern for Windows™, 10.7. Throughout the online manuals and the Help files, the new features are indicated by the **New** symbol.

Govern Admin

.NET Installer for Component Integration Interfaces

There is a new .NET component installer for Govern's component integration interfaces. All individual installers are now consolidated within one installer. *See .NET Installer for Govern for Windows Interfaces on page 4*.

Support for USPS Intelligent Mail Barcodes

Configuration parameters have been added to the System Registry Maintenence formthat supports USPS Intelligent Mail barcodes. The barcode formats that are supported are IMB_31 and IMB_65. *See Support for USPS Intelligent Mail Barcodes on page 38*.

Govern Batch

MS Govern Batch (.NET) can be called from GovBatch

The MS Govern Batch .NET application can be called fromGovBatch release 10.7. This will allow for users of GovBatch to access the new Govern.NET batch processes. *See MS Govern Batch (.NET) can be called from GovBatch (Govern for Windows Batch) on page 275*

> **Note:** This functionality is only available to users that have obtained licenses for Govern.NET and have the required applications installed.

Improved User Menu Access

In Release 10.7 a new enhancement offers greater control over user menu access. Administrators are able to give access to individual menu items; previously menu access was "all or none". For example, an Administrator or Super User can now give access to a specific menu item under a *Govern*

Batch Processing (**GovBatch**) menu, as opposed to giving access to all menu items. *See Assigning User Permissions to Batch Processes on page 292.*

.NET Installer for Govern for Windows Interfaces

NEW

There is a new .NET component installer with version 10.7. The goal of this installer is to consolidate the installation of all previous .NET installers under one common Interface.

At the beginning of the installation process, a validation for the version 2.0 and 4.0 of the .NET Framework is performed. Version 2.0 is required as some components are compiled with FrameWork2.0.

Note: If an upgrade is required, you will be presented presented with an error requesting that you upgrade to the necessary version of the .NET Framework.

Who should run the Installer?

Users of the following integration interfaces should run the installer.

- **Credit Card Helper** – Users of IC Verify for Credit Card processing
- **Crystal Helper** – For users of the Utility Billing eBilling module which generates .PDF bills.
- **Email Helper** – Used in systems that may have reported issues with email integration; this component was a workaround.
- **FMS Integration** – Users that are using the MS Govern FMS G/L interface
- **Great Plains Integration** – For users of the Great Plains G/L interface
- **iNovah Integration** – This is for Govern users with the iNovah payment collection and processing interface.
- **OneCode Integration** – For users of the Intelligent Postal Barcode Generator called OneCode.
- **Rhode Island DMV Integration** – Users of the Integration interface for the Rhode Island Department of Motor Vehicles (DMV)
- **Sonrai Systems Integration** – Designed for users of the Sonrai Systems waste and recycling system management system.
- **SIRE Integration** – Any users of the Govern for Windows SIRE Integration that allows exchange of multimedia files with the SIRE Document Management System.

Note: This installer must be run on each individual system that will be accessing the any of the above listed interfaces.

Running the Installer

To run the installer, obtain the **NET107Setup.exe** form MS Govern technical support:

1. Double-click the **NET107Setup.exe** file.
2. At the first screen, you will see the list of integration packages that the installer will check for and replace; click OK to continue.
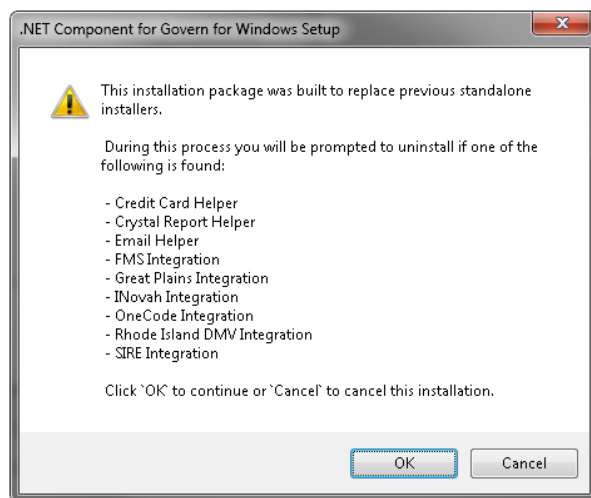
> **Note:** Since the installer was previously run, the screen will be different; click OK to continue. Running the installer multiple times will in no way affect your system.
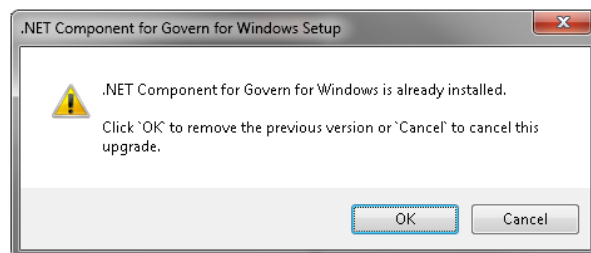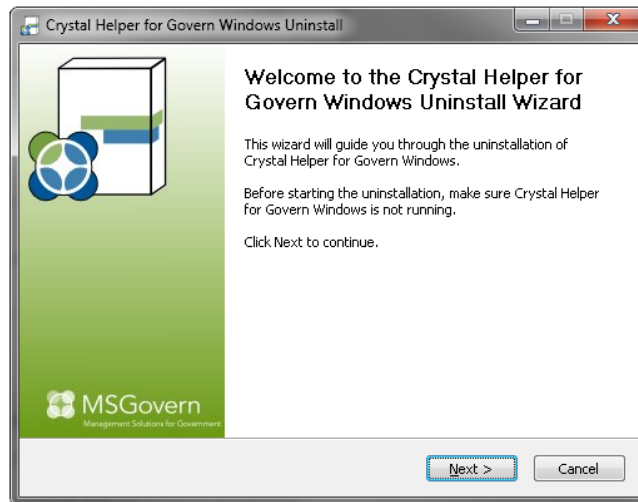
3. At the *Welcome* screen of the first component to uninstall, click **Next**.
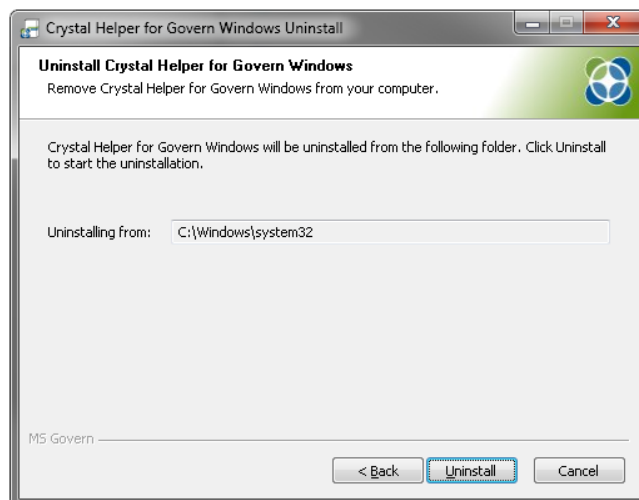
4. When the component has been removed, i.e. uninstalled, click Finish.

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You will repeatedly uninstall any of the interfaces that were discovered by the installer. When all components have been completely uninstalled, you will be presented with the .NET Component for Govern for Windows Setup screen.

5. At the installation *Welcome* screen, click **Install**.
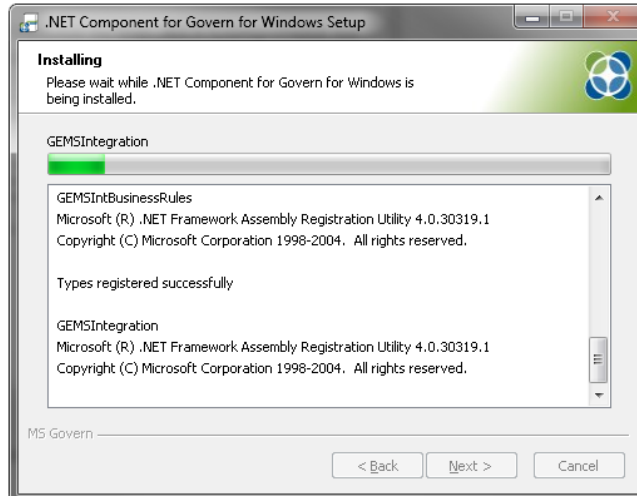
During the installation process, all integration interface components will be installed.

6. At the completion screen, click Finish.

At the completion of this process, the target system will be updated with the latest version of all Govern integration components.

> **Note:** It will be necessary to have the proper licenses to access these interfaces. Contact MS Govern Technical Support for any licensing requirements.

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CHAPTER 1: ADMINISTRATOR

Overview

This section provides the information you need for configuring the Govern application. This includes setting up users, groups and departments; defining default parameters; configuring external applications and the GIS component and creating SQL queries and definitions, logical expressions, formulas and constant values.

Administrative Forms for Govern Setup

System Registry Maintenance

Set the default parameters for the organization on the *System Registry Maintenance* form. These include the default path for the Help files, reports, query definitions and multimedia documents; the G/L interface type; encryption of Social Security Numbers and Federal IDs; the link type and P_ID column name for the GIS and general parameters; such as support of multiple jurisdictions, user name and date stamp and legal index format. These parameters are saved to the SY_REGISTRY table.

> **Note:** Certain parameters; such as, the paths to Help files, reports, custom reports, bitmaps, the image editor and query definitions, the GIS Link Type and P_ID column name can also be set on the *User Registry Maintenance* form. Those set for the user have precedence over those set at the system level.

See System Registry Maintenance on page 16.

User Registry Maintenance

Define default parameters at the user-level on the *User Registry Maintenance* form. These parameters include user identification and the default language for the computer; default paths to Help files, bitmaps, reports and query definitions; GIS definitions; such as GIS link type, project, view and theme, P_ID column name; Melissa data and the *Document Locator External* folder. These parameters are saved to the SY_REGISTRY and USR_REGISTRY tables. *See User Registry Maintenance on page 53.*

User Maintenance

Maintain user data on the *User Maintenance* form. Create new users, set access rights or remove the user profiles that are no longer active. *See User Maintenance on page 60*.

Menu Security Setup

Grant and restrict user access, for administrators, on the *Menu Security Setup* form. Access rights can be set for each menu item in Govern Admin. *See Menu Security Setup on page 72*.

> **Note:** This is not required for administrators or super users.

User Groups

Define User Groups and set access rights on the *Group of Users* form. Enhance security by setting permissions by jurisdiction. *See Groups of Users on page 74*.

Global Field Validation Mask

Define patterns or masks for data entry on the *Global Field Validation Mask* form. *See Global Field Validation Mask on page 78.*

Validation Tables and Codes

Maintain the *System* and *User Validation Tables* on the *Validation Tables* form. These tables are used to validate the information entered in the various fields. Create and maintain the elements of the tables on the *Validation Codes* form. *See Validation Tables on page 85*.

Property Control Validation Tables

Use the Property Control Validation Tables form to maintain the tables that are linked to the *Property Area* function in Govern. These tables are saved by year and by jurisdiction, if applicable. *See Property Control Validation Tables on page 97*.

Dataset Source Setup

Grant and restrict user access to the *Dataset Sources* on the *Dataset Source Setup* form. *See Dataset Source Setup on page 98*.

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Department Setup

Define the profile for each department on the *Department Setup* form. This includes the fiscal year used by the department, access to the Govern User functions and access to Accounts / Receivable data. *See Department Setup on page 101.*

Functions Setup

Grant and restrict access to the Govern functions on the *Functions Setup* form. Access is set by department, group and user. You can also add your own business rules to the *Add, Save* and *Delete* buttons of any Govern function, from this form. *See Functions Setup on page 123.*

Audit Trail and Data Duplication Setup

Track modifications to selected Govern tables, by function, using the *Audit Trail* form. Define the data that can be duplicated from an existing property to a new one, using the *Data Duplication Setup* form. *See Audit Trail and Data Duplication Setup on page 131.*

Govern Admin Audit Trail

You can now create an audit trail to track modifications made in Govern Admin. You need to select the forms on which you want to set the audit trail. Modifications are saved to USR_AUDIT_ADM. *See Govern Admin Audit Trail on page 134.*

Bill Messages Setup

Add a message to your next billing run using the *Bill Messages Setup* form. This message is valid for one billing only. *See Bill Messages Setup on page 137.*

Lists and Crystal Reports Setup

Use the *List and Reports Setup* form to define the Govern functions and Govern batch processes, from which the reports can be launched. Set access permissions by department, user and group. Then, define your *Report Tree View* for Govern. *See Lists & Crystal Reports Setup on page 140.*

SQL Server Reporting Services

SQL Reporting Services (*SSRS)* is a database reporting solution that is available with Microsoft® *SQL Server*® (Version 2005 and later). Govern Version 9.5 and higher offers support for SQL RS and the ability to set the parameters of a report datasource at run-time. *See "Enable SQL Reporting Services" on page 43.*

User Text Maintenance

With the new *User Text Maintenance* form, you can now modify all the text from the SY_TEXT table. This includes the entries on the Govern CoolBar, messages and labels on functions. The text is modified on the user interface but remains unchanged in the database. *See User Text Maintenance on page 160.*

Process Flow Wizard

Governs Batch Processing application now includes a Batch Process Flow Wizard. You can define the processes that you need to run, in the order they need to run. Details are saved and displayed for tracking information. *See Process Flow Wizard Setup on page 161*

Scanner Parameters Setup

Define your scanner settings on the *Scanner Parameters Setup* form. Any TWAIN-compatible scanner can be used to copy images to disk for the *Multimedia* functions. *See User Text Maintenance on page 160*.

IC Verify Setup

Use the *ICVerify Setup* form to integrate the *ICVerify package*, for credit card transaction processing. *See ICVerify Setup on page 168*.

External Application Setup

Launch an external application directly from Govern, after setting it up through the *External Application Setup* form. *See External Application Setup on page 178*.

Formula Editor

Create customized formulas, using the *Formula Editor* form. Formulas can be used in Mass Appraisal calculations, permit fee calculations, added to a logical expression, created through the *Logical Expression Block Editor* and

added to a customized database field. *See Formula Editor on page 183*.

Logical Expression Block Editor

Create customized logical expressions, using the *Logical Expression Block Editor* form. Logical expressions can be used in Mass Appraisal calculations, permit fee calculations and added to a customized database fields. *See Logical Expression Block Editor on page 191*.

Constant Editor

Define and maintain constant values using the *Constant Editor* form. Constants can be used in formulas and logical expressions for values that change on a yearly basis. As constants are saved by year, you only need to edit the constant definition in order to update your formulas and logical expressions. *See Constant Value Editor on page 208*.

SQL Definition Setup

Create customized SQL queries, on the *SQL Definition Setup* form. SQL Queries can be linked to command buttons, used for displaying information on the toolbar or used in *Formulas* and *Logical Expressions. See SQL Queries on page 211*.

Queries by SQL Setup

Create customized SQL queries on the *Queries by SQL Setup* form. These queries can be selected from a drop-down list and executed for the *Query by SQL* search. They can also be saved by jurisdiction to be used by authorized users only. *See "Queries by SQL Setup" on page 212*.

Govern Admin Interface

📖 Overview

This section lists the modifications made to the *Govern Admin* interface for version 10.7 and describes how to modify the background.
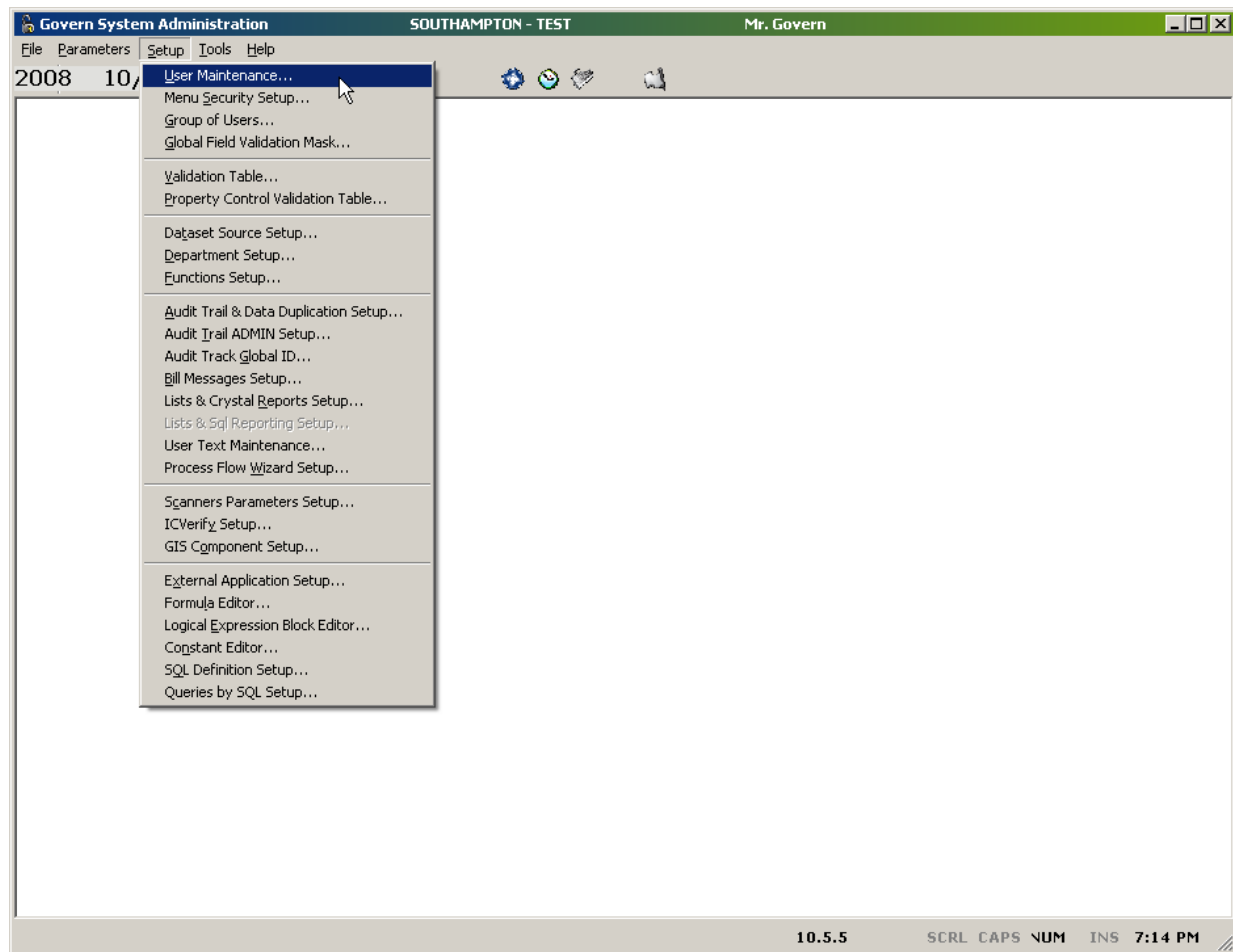
Govern Admin Interface

Toolbar Icons

You can launch *Govern*, *Govern Batch Processing* and the *Payment Lockbox* applications by clicking the icons displayed on the main menu of the Govern Admin interface, as well as from the **Tools** menu.

Govern for Windows Background

Several images are included in the `Govern\Bitmap` directory for the background of the Govern for Windows interfaces. By default, an image is automatically selected based on your screen resolution.

To replace this image:

1. Name your customized image **background_800.bmp**, **background_ 1024.bmp**, **background_ 1152.bmp**, **background_1280.bmp** or **background_1600.bmp**, according to your screen resolution setting. If you have a non-standard setting, the next highest resolution is used.
2. Scroll to the `Govern\Bitmaps` directory.
3. Paste your image to this directory to override the existing image.

Note: If you have Govern Admin, Govern and Govern Batch Processing on your computer, the background images of all these applications are replaced.

You can replace this with an image of your choice.

System Registry Maintenance

📖 Overview

Set the default parameters for the organization on the *System Registry Maintenance* form and it's associated tabs. These include the default paths for help files, reports, query definitions and multimedia documents; the G/L interface type; encryption of confidential information; GIS information and general parameters; such as support of multiple jurisdictions, the user name and date stamp and the legal index format. The parameters under these tabs are saved to the SY_REGISTRY table.
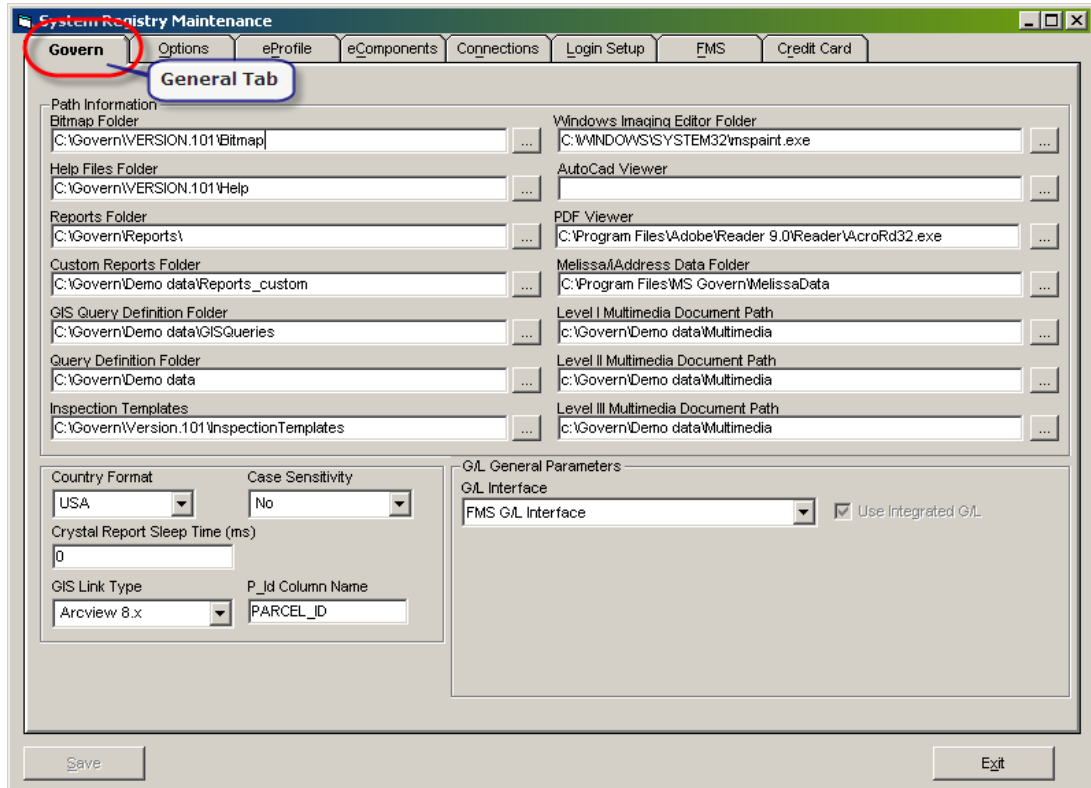
> **Note:** Certain parameters; such as, the paths to Help files, reports, custom reports, bitmaps, the image editor and query definitions, the GIS Link Type and P_ID column name can also be set on the *User Registry Maintenance* form. Those set for the user have precedence over those set at the system level.

The display of configuration tabs in the *System Registry Maintenance* form are conditional upon user serial numbers. Some serial numbers enable the display of the tabs used to configure the *eComponents*, i.e. *eProfile*, *eComponents*. Parameters in these tabs will only configure *eComponent* applications that are before release 4.0.

> **Note:** If you are using eComponents release 4.0 or greater, you must use the *Govern NetAdmin* (**GNA**) release 4.7 or greater for your Web site configurations.

To access this form, from *Govern's* main screen:

1. Select *Tools* > **System Administration (Govadm32.exe)**

2. In Govern Admin select *Parameters* > **Edit the System Registry...**

System Registry Maintenance Command Buttons

Saving the System Registry Setup: Once the fields have been filled in, click the **Save** button to save the information in the SY_REGISTRY table.

Exit: Click **Exit** to close the form. A confirmation message appears if there are any unsaved modifications.

General Tab

Paths to Govern directories are displayed on the *General* tab, the other Govern options are now distributed on the second tab. In order to provide more configuration options to Govern users, additional configuration parameters have been added to the *Connections* tab and the *Login Setup* tab.

General Tab Parameters

Path Information group

You can select the drive and directory to define the required paths for the *System Registry Maintenance* information.

> **Note:** You can enter Universal Naming Convention (UNC) commands for the path information instead of entering a map to the drive. Enter double backslashes for the server name and single backslashes to identify the directories; i.e., \\servername\path.

Bitmap Folder: Enter the path to the Bitmaps folder.

Help Files Folder: Enter the path for the On-Line Help folder.

Reports Folder: Enter the path to the Reports folder. These are the standard reports included in the Govern package.

> **Note:** Before setting up your directory paths to the standard reports, on the *System Registry Maintenance* and *User Registry Maintenance* forms, ensure that you open the directory for your state and copy the reports to the **Standard Reports** directory. *See Appendix A: Standard Reports on page 320 for details.*

Custom Reports Folder: Enter the path for the Custom Reports folder. Custom Reports are created specifically for a client or by the client.

GIS Query Definition Folder: Enter the path to GIS Queries folder.

Query Definition Folder: Enter the path for the Queries folder.

Inspection Templates: Enter a path to a directory containing an Adobe Acrobat .PDF file or Microsoft Word.DOC templates; these are documents or forms that may be required to accompany certain inspection types. *Refer to Inspection Templates in the Inspections guide.*

Specify Lockbox Temp File and Log File Locations

NEW For better system management, you can specify the locations of your *Govern Lockbox Temp file*, and *Log files.* By default these directories are located in the **bin** folder in the *Lockbox* install directory for the *Lockbox Temp* files, and the local systems **Temp** folder for the *Log* files. Locations can be local, or specified with the *Uniform Naming Convention* (**UNC**). When the locations for these files are selected by the user, the selected locations will override the system default.

Lockbox Temp Folder Network Locations

When a network file location, i.e. a *UNC* network path is specified for the *Lockbox* temp file, unless the location is exclusive to the user, issues may arisein the form of the temp file being "locked" by another user. Ideally, when selecting a network location, ensure that the location is exclusive to each user.

> **Note:** Due to virtualization features, a Windows Terminal Services network environments may not experience the issues that are associated with a shared network path. For further configuration details, consult with your network administrator.

Log File Folder Network Locations

The Log file is a dynamic file that is used for logging error messages. When its location has been specified as a shared location, issues may arise when the file is being written to by multiple users. Therefore, ideally, when selecting a network location, ensure that the location for the log file is exclusive to each user.

> **Note:** Windows Terminal Services network environments may not experience the issues that are associated with a shared network path as a result of its virtualization features. Consult your network administrator for further configuration details..

To specify an alternate location for your Lockbox temp file or Log files, in *Govern Admin*...

1. Select *Parameters* > **Edit the System Registry...**

2. Click to select the *Govern* tab.

3. Look for the parameters labelled **LockBox File Folder** (**A**), and **Log Files Folder** (**B**).
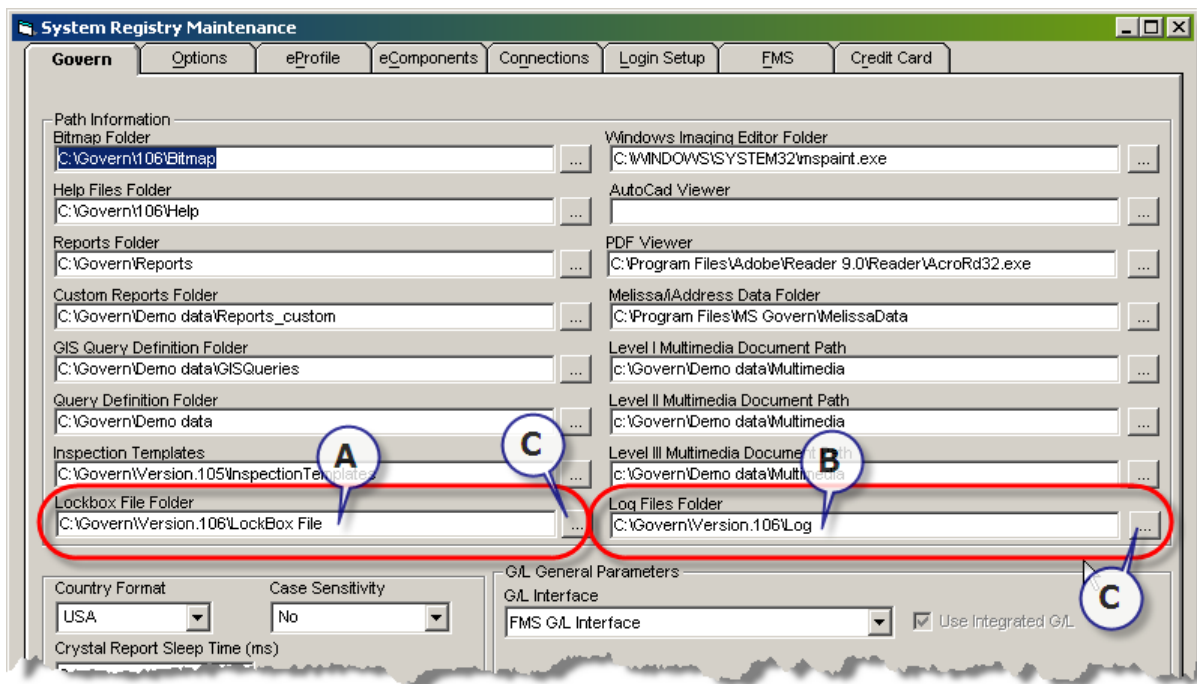
4. Click "**...**" (**C**) to navigate to the target directory (**D**).

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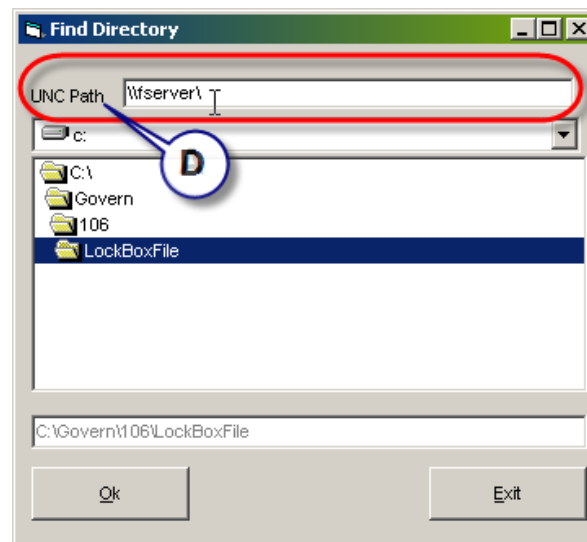
5. Navigate to the folder that you would like to designate as the *Lockbox Temp File* folder, or the *Log File* folder; alternatively, you can enter a UNC path to the network drive or folder.

NEW   **LockBox File Folder:** You can specify a location for the Lockbox temp files by entering a path to a local directory, or enter a UNC network location. *See Lockbox Temp Folder Network Locations on page 19 for additional details.*

> **Note:** Issues may exist with a shared network path for a Lockbox Temp file. Consult your network administrator for further configuration details..

NEW   **Log Files Folder:** To specify a location that will be used for storing log files, enter a path to a local directory, or enter a UNC network location. *See Log File Folder Network Locations on page 19 for additional details.*

> **Note:** Issues may exist with a shared network path for a log file. Consult your network administrator for further configuration details..

Windows Imaging Editor Folder: Enter the full path to the *Imaging* editor, you are using.

> **Note:** Once a valid path is entered, the **Imaging Editor** option is enabled on the **Tools** menu in Govern.

AutoCAD Viewer: Enter the full path and executable (.exe file) for your AutoCAD Viewer, in order to display AutoCAD files, directly from the *Multimedia Information* and *Multimedia by Name* functions, in the specified viewer. This can also be defined on the *User Registry Maintenance* form.

PDF Viewer: Enter the full path and executable (.exe file) for your PDF Viewer, in order to display PDF files, directly from the *Multimedia Information* and *Multimedia by Name* functions, in the specified viewer. This path can also be defined on the *User Registry Maintenance* form.

Option to Use iAddress for Address Verification

NEW **Melissa / iAddress Data Folder:** Enter the path to the *MelissaDATA* **or** *iAddress* address verification application.

> **Note:** If you are running Govern offline, it is important to enter this path in the *User Registry Maintenance* form. When offline, Govern will default to the paths specified in the *User Registry Maintenance* form.

If you are including *MelissaDATA's Residential Business Delivery Indicator* (**RBDI**) add-on with your existing Melissa Address Verification service, place this in the same directory. *Refer to the Property Control guide for details.*

Should you wish to use the *iAddress* address verification application, you must select the *iAddress* option in the *User Registry Maintenance* form. *See Option to Use iAddress for Address Verification on page 59 for details.*

> **Note:** A user license for the iAddress application is required.

Multimedia Document Path

Level I Multimedia Document Path: 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, 20080530: May 30th 2008. All the documents you save during the course of a day will be saved in the same directory.

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

Level III Multimedia Document Path: 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 the SY_REGISTRY table is automatically updated. The batch process will use these paths, in the Imaging section to archive the multimedia documents.

> **Note:** If you change the path (for the Levels I, II or III), 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.

Country 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, for the current record, on the *Name and Address Maintenance* function in Govern.

Case Sensitivity: Select one of the following options, from the drop-down list:

- **1st Letter (N&A)** - Saves the first letter of each field in upper case
- **No** - Select to save the data as entered
- **Ucase** - This saves the *Name & Address*, *Property Location*, and forms from the NA_NAMES and PC_ADDRESS tables, and any data that is masked in other tables, in upper case.
- **Ucase (N&A)** - This will save the *Name & Address* data (from the NA_NAMES and PC_ADDRESS tables) in upper case

Crystal Report Sleep Time (ms): Select this option to set a delay, between the time a report is created and can be opened. Then, enter the length of the delay in milliseconds. The delay ensures that the report is completely copied to your *Temp* directory before it can be opened. Otherwise, you may get an error message indicating that Govern could not find the report or could not open it. This type of error is more frequent with longer reports since more time is needed to copy the file to the *Temp* directory.

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Geographic Information System (GIS) Parameters

GIS Link Type: Select the GIS Link from the drop-down list.
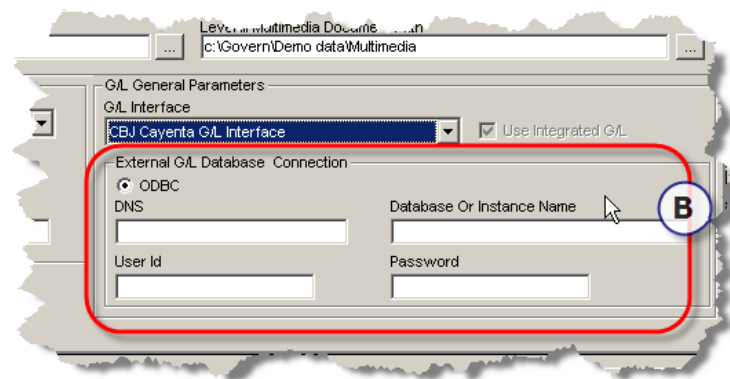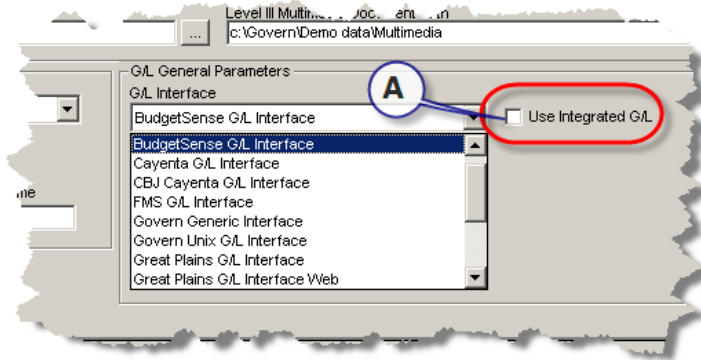
GIS Link	Definition
ArcView 8.x	ArcView 8.x, or higher, application
ArcView 8.x Tax Map #	ArcView 8.x, or higher, application with search by Tax Map Number
Horus	Kheops application
JMap	Kheops application
MapInfo	MapInfo application
No	None
Test	Test
Yes	ArcView 3.3 Application

If you are using Arcview 8.x, Arcview 8.x with Tax Map Number, or higher, enter the path as in the following example:

> c:\Govern\gis\gis\govern31.mxd

Otherwise, enter the path as follows:

> GIS=C:\ESRI\AV_GIS30\ARCVIEW\BIN32\arcview.exe c:\Govern\
> gis\gis\govern.apr govern,govern

P_ID Column Name: After entering the GIS *View* and *Theme*, enter the P_ID column name, associated with the shape file to be used with the GIS application. When the application is loaded, the records in this column, matching those in the current recordset are highlighted.

Tax Map Column Name: After entering the GIS *View* and *Theme*, enter the Tax_Map column name, associated with the shape file to be used with the GIS application, if you are using ArcView 8.x, or higher, with Tax Map Number. When the application is loaded, the records in this column, matching those in the current recordset are highlighted.

Note: This field option will be displayed when the *ArcView 8.x Tax Map #* option is selected from the *GIS Link Type* drop-down menu.

General Ledger
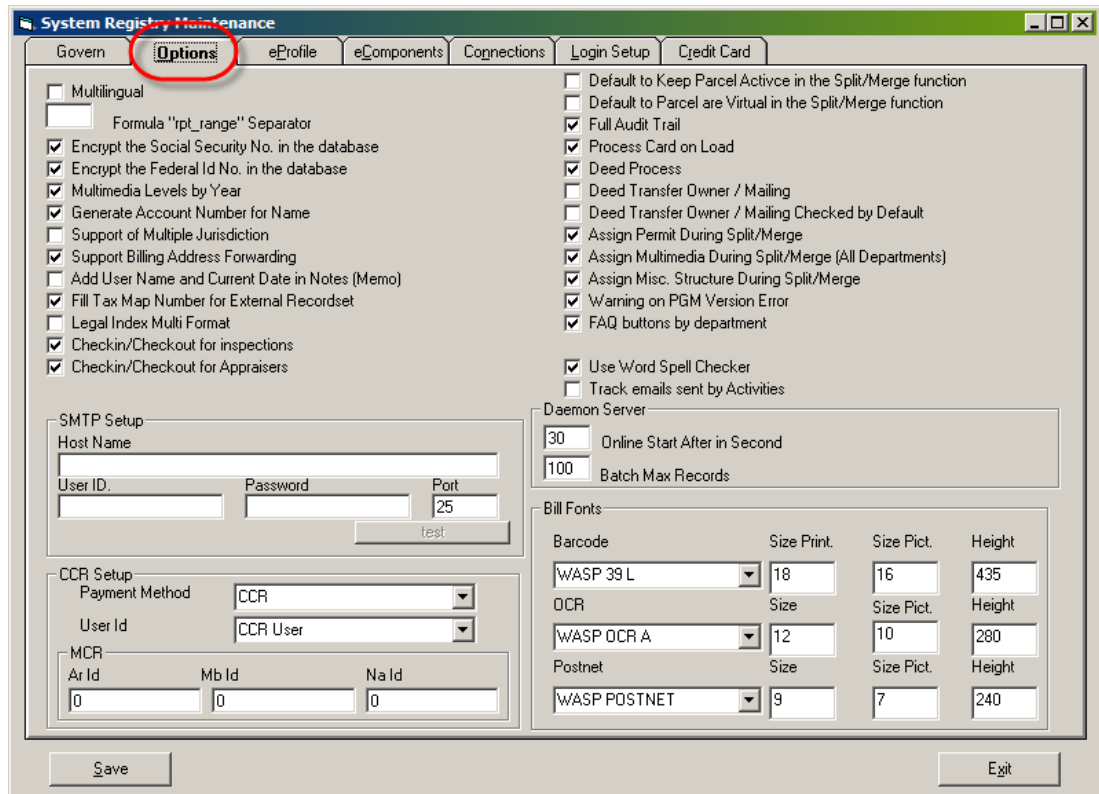
G/L Interface: Select a General Ledger Interface from the drop-down list. (**Table: VT_SY_GL_INTER**). The selection will be used during the batch process. For example, selecting *Govern Unix* will enable the Govern G/L V4.5 Import / Export process.

G/L Interface Option	Description
ACS G/L Interface	Select this option to interface with the ACS G/L Interface.
BudgetSense G/L Interface	Option to interface with the BudgetSense G/L Interface.
Cayenta G/L Interface	Select to use the Cayenta G/L Interface.

G/L Interface Option	Description
CBJ Cayenta G/L Interface	Use this option to use the CBJ Cayenta G/L Interface.
FMS G/L Interface	Select this option to use the MS Govern FMS G/L Interface.
Govern Generic G/L Interface	This is the option for the Govern G/L Interface.
Govern Unix G/L Interface	Option for the Govern Unix G/L Interface.
Great Plains G/L Interface	If you are using Great Plains as you G/L application, select this option.
Great Plains G/L Interface Web	Select this option for the Great Plains G/L Web interface.
Lawson G/L Interface	Choose this option to use the Lawson G/L Interface.
Munis G/L Interface	This is the option to use the Munis G/L Interface.
New World System	Select this option if you are using New World System.
S.F.G. G/L Interface	Use this option if you are using S.F.G. as your G/L interface.
Savannah G/L Interface	Choose this option is you are using the Savannah G/L solution.
Sungard HTE G/L Interface	Select this option if you are using Sungard HTE as your G/L solution.

Note: When a G/L Interface is selected, there may be additional options associated with the selection. When the option for "Use Integrated G/L" appears, this is an indication that information is fetch from the G/L system; additional configuration may be required. For detailed G/L interface instructions, contact your G/L interface supplier.

Options Tab

System Registry Maintenance Parameters

Multilingual: Select this option if you are supporting two or more languages, for Govern functions, in your setup; for example, if you are supporting English and French, or English and Spanish. You will also need to set this option for each user on the *User Registry Maintenance*.

Formula "rpt_range" Separator: Using the procedure described under *Creating User Prompts on page 147*, you can define prompts to be displayed when a Crystal report is run, in Govern. The user enters the parameters, such as a range of parcel numbers or tax map numbers, as in the following screen shot, in order to view specific information on the report.

You can define a default separator to be used for displaying these prompts. Enter a maximum of two characters for the separator, such as a comma (,) or a semi-colon (;) and a space.

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Do not use clob: Select this option to use *varchar2* instead of *blob* and *clob* types.

Note: This option is visible only on Oracle connections.

Encrypt the Social Security No. in the Database: If selected, this will encrypt the Social Security Number in the database.

Encrypt the Federal ID No. in the Database: If selected, the Federal ID numbers will be encrypted in the database.

Generate Account Number for Name: Select this option to associate a system-generated account number with a name when you create new name and address records.

Support of Multiple Jurisdictions: ISelect this option if you are maintaining data by jurisdiction. *See Jurisdiction on page 68 for details about jurisdictions.*

NEW **Support Billing Address Forwarding:** Select this option to enable the Address Forwarding parameters on the *Utility Billing* (**UB**), *Self Reported* (**ST**), *Personal Property* (**PP**), and *Real Estate* (**RE**) tax *Mailing Indexes*. Billing address forwarding can be set up for your clients who spend part of the year at one or more alternate locations. *Refer to the respective* **UB**, **ST**, **PP**, *and* **RE** *Tax Assessment & Billing guides for details.*

Add User Name and Current Date in Notes (Memo): Select this option to add the user name and date automatically to each entry in the **Notes and Comments** text boxes in Govern.

> **Note:** You can now specify the functions to which you want to apply this feature, through the *Auto Trail and Data Duplication Setup* form, rather than applying it universally throughout Govern. *See Audit Trail and Data Duplication Setup on page 131.*

Fill Tax Map Number for External Recordset: If selected (Value = -1), the Tax Map Number will be loaded into the PC_EXTERNAL table when you load data using the **Load Recordset to External Recordset** option from the **File** menu in Govern. *Refer to the File section of the General Information guide for details.*

Legal Index Multi Format: Select this option to add a legal index to the *Parcel Information* form in Govern. This index can be entered when you search for a parcel. The **Parcel Index** text box appears on this form if this option is selected; otherwise, it is invisible.

Parcel Records Can Be Locked When Exported

During an *Export to an Inspector / Export to an Appraiser Database* process, prior to *Release 10.5* only the Inspection records were locked. In *Release 10.5 and later*, locking can be applied to the parcel record. This means that all *Mass Appraisal* (**MA**) related functions, and certain *Land Management* (**LM**) functions, will also be locked. Exported parcels are flagged as exported (Table: PC_PARCEL) during the *Microsoft Access* database export process.
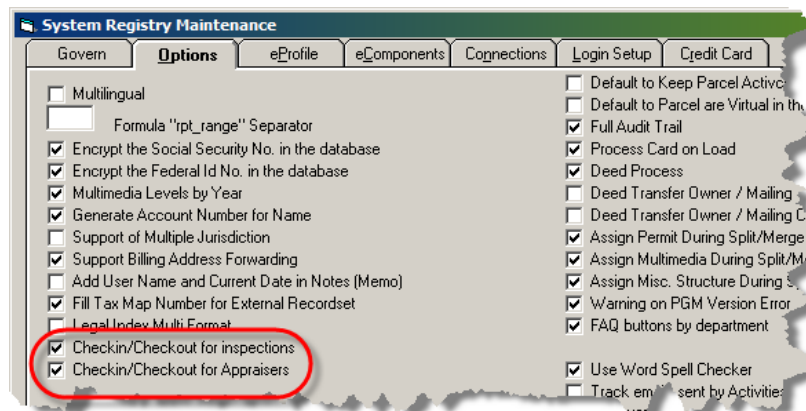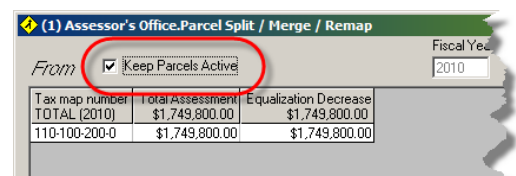
Checkin/Checkout for Inspections: Select this option to enable the locking of exported parcel records during an *Export to an Inspector Database* process.

Checkin/Checkout for Appraisers: Select this option to enable the locking of exported parcel records during an *Export to an Appraisers Database* process.
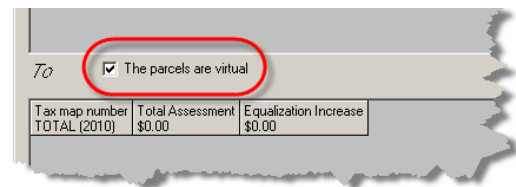
Note: If these options are not selected, the behavior of the *Checkin/ Checkout* feature will remain unchanged, i.e. pre *Release 10.5*.

Select "Keep Parcel Active" as default in Split/Merge Function: Select this option to set the "Keep Parcels Active" option as the selected default in the **Parcel Split / Merge / Remap** function in *Govern for Windows*.

Select "The Parcels are Virtual" as default in Split/Merge Function: Click this option to set the option of "The Parcels are Virtual" as the selected default in the **Parcel Split / Merge / Remap** function in *Govern for Windows*.
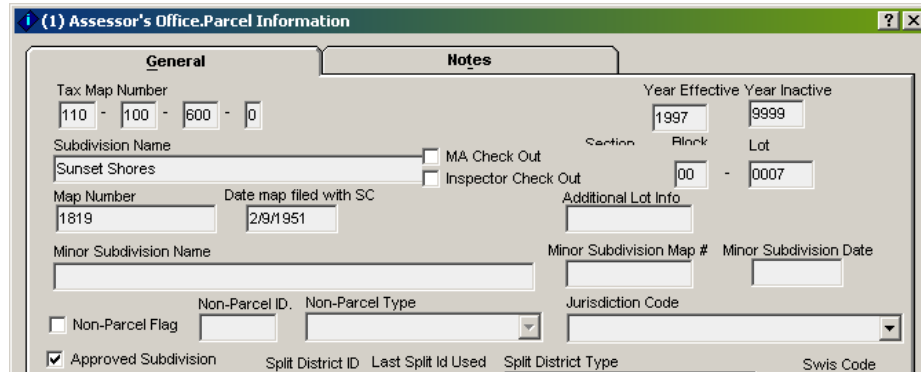
Refer to the Split / Merge / Remap section of the Property Control guide for details on the Split / Merge process.

Full Audit Trail: Govern has an audit feature that allows the user to track basic modifications to selected Govern tables, by function. Should a full exhaustive audit be required that includes creation and deletion information, select the *Full Audit Trail* option. Before enabling this option, it will be

necessary to enable the Audit Trail option for the tables you want to audit. *See "Audit Trail and Data Duplication Setup" on page 131.*

> **Note:** Due to the fact that complete details are kept of all fields, a lot of data may be generated; enabling this option may have storage implications.

Process Card on Load: If selected, this will process the Summary Card when the User opens it, otherwise the Options screen is displayed and the User will have to press the **Refresh** button after the card is loaded.

Deed Process: Select this option to link the *Deed Information* and *Sales Information* functions in Govern. *Refer to the Deed Information section in the Mass Appraisal Sales guide or in the Property Control guide for further details.*

Deed Transfer Owner / Mailing: Select this option to automatically update the Mailing Index with new owner information from the *Deed Information* function.
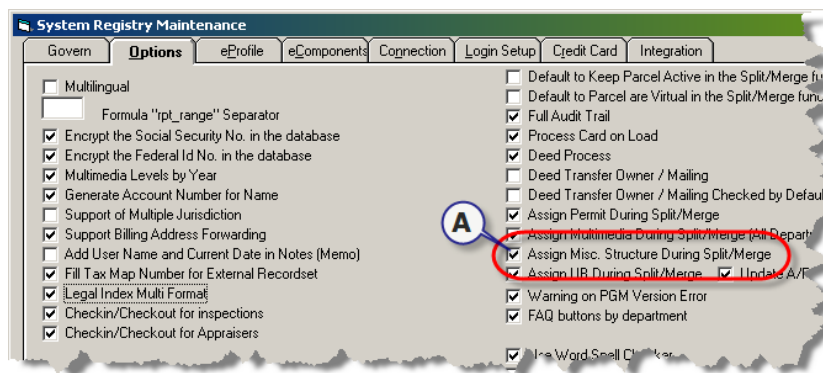
Assign Permit During Split / Merge: Select this option to allow Govern users to re-assign permits to a new tax map number when performing a parcel split, merge or remapping. *Refer to the Split / Merge / Remap section of the Property Control guide for details.*

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Assign Multimedia During Split / Merge (All Department): Select this option to allow Govern users to re-assign multimedia files to a new tax map number when performing a parcel split, merge or remapping. *Refer to the Split / Merge / Remap section of the Property Control guide for details.*

Assign Misc. Structure During Split/Merge: Select this option to automatically move a misc. structure with a building during a *Split/Merge* process. *Refer to the Mass Appraisal Miscellaneous Structures guide for details.*

Warning on PGM Version Error: Select this option to prompt users when a more recent version of Govern Software is currently available. If this option is not selected and the *Database* version does not match the *Application* version, Govern applications will not start. If this happens the Administrator can launch Govern Updata and activate the option from there.

FAQ Buttons by Department: Select this option to save your Frequently Asked Questions (FAQ) by department. Deselect this option to use the same FAQ throughout the organization. *See New Command Buttons on page 257 for details on the FAQ feature.*

Creating Jurisdictions

Jurisdictions are set up through the VT_USR_ JURISD validation table. *See Validation Tables on page 85.*

> **Note:** If you are using jurisdictions with the Mass Appraisal module, the 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. *See Groups of Users on page 74.*

Spell Checking Features

Use Word Spell Checker: Select this option to use the spell checking feature throughout Govern. This feature uses the spell checker that is installed with Microsoft® Word or the Microsoft® Office suite.

There are four (4) steps required to configure spell checking:

STEP 1 - Verify Installation of MS Word or Office

1. Ensure that Microsoft Office® Word® or the Microsoft Office Suite with the Spell Checker is set up on each computer. The default language selected in Word is used in Govern; for example, American English, Canadian English or Canadian French.

STEP 2 - Govern Admin Configuration

> **Note:** The following steps must be performed by someone with system administrator right.

1. In Govern Admin, select *Parameters* > **System Registry Maintenance**.

2. In the *System Registry Maintenance* form, under the *Options* tab, select the Use *Word Spell Checker* option; click **Save** to save your changes.

> **Note:** "**Spell checking**" is now enabled, and will appear as a menu option in *Govern for Windows*, but until you specify which fields in which forms are to be checked, spelling verification will not occur.

It is now necessary to enable the checking process on a field by field basis in *Govern for Windows*.

> **Note:** If *Govern for Windows* was open during your modifications in *Govern Admin*, you will need to close down and re-open *Govern for Windows*.

STEP 3 - Govern for Windows Configuration

Spell Checking by Fields

The spell checker is used on specific memo or text fields. When the spell checking option is activated in the *Govern Admin*, the individual fields can be specified using *Field Setup Mode* in *Govern for Windows*. *See "Validation Type group" on page 241.*These steps must be performed by a system administrator.

3. In Govern for Windows, Use the Field Setup Mode to enable spell checking for individual fields. *See Field Setup Mode on page 237, and Validation Type group on page 241 for details*.

4. Exit *Field Setup Mode*; select *Setup* > **Cancel Field Setup Mode**.

STEP 4 - Spell Checking in Govern for Windows

Now, only the memo and text fields with spellchecking enabled will be reviewed by the spell checker when the form is saved.

To perform a spell check, in *Govern for Windows*:

5. Select *Options* > **Spellcheck**, to enable spell checking; a check mark will appear beside the option in the menu.
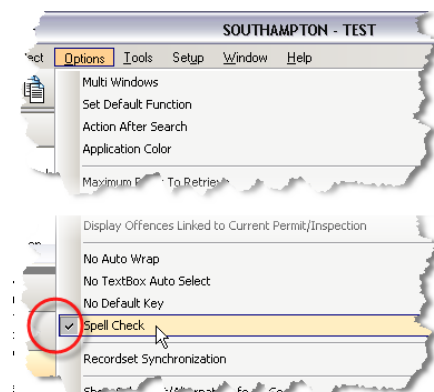
6. Select a function that has Spell Check enabled on text and memo fields.

7. Make any required text entries; click **Save**.

Prior to saving the form, the spell check Spelling form will appear highlighting suspect words. As with traditional spelling checkers, you will be prompted with recommended changes, or the option to ignore. When no longer required, the option to spell check can be turned off by the user.

To turn off spell checking:

1. Select *Options* > **Spell Check**; the check mark will disappear from the menu option.

Track Emails sent by Activities: Emails may be sent as a result of an activity step. Select this option to enable the system to track these messages. *See Messgaing System in the Permits & Licenses guide for details.*

Daemon Server group

The *Daemon Server* can be used for *Tax Assessment* and posting to *Accounts Receivable*, as well as *Mass Appraisal* computations.

Online Start After (Seconds): Enter a delay (in seconds) for starting the Daemon Server This feature is used for Mass Appraisal calculations launched from a Govern function. If there is no delay, the *Daemon Server* starts as soon as the user clicks the **Save** button. This presents a problem if the user saves a modification, then revises and clicks **Save** again immediately afterwards. To prevent a lock being placed on the server, enter a delay.

Batch Max Records: Enter the maximum number of records to be sent to each server for batch processing.

See Sending Computations to the Daemon Server on page 297, for details on the Daemon Server.

SMTP Setup group

The parameters in this section are used to provide both e-mail service for the eComponents, and for e-mail notifications for batch processes. *Refer to the*

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eProfile guide and to Setting up E-mail Notification for Batch Processes on page 310 for details.

Host Name: Enter the host name of the server.

User ID: Enter the user identification for the e-mail account, from which messages are sent.

Password: Enter the password for the e-mail account.

Port: Enter the port for the e-mail service. By default, this is set to 25.

Test (button): Click **Test** (**A**) to verify functioning of your email connection.
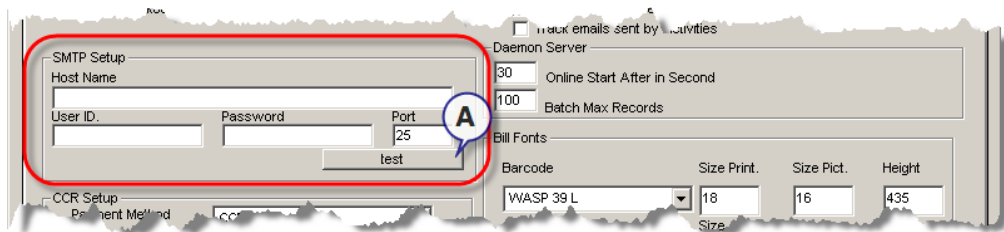
When you click send, you may encounter the following notification message.
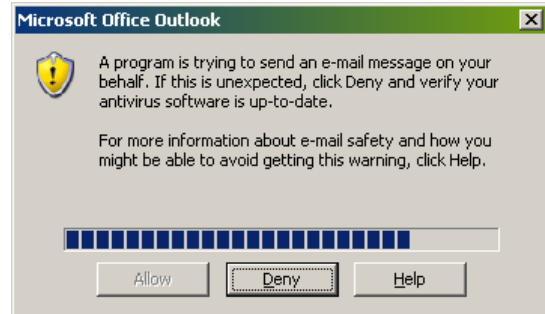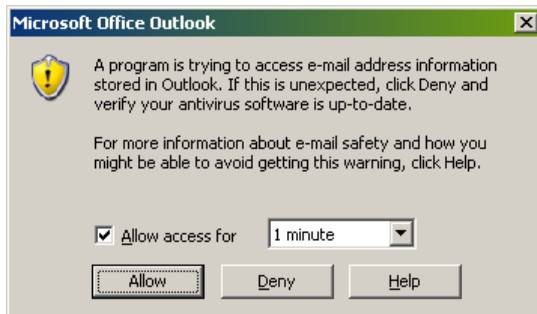
Click **Allow** to enable the test to proceed. If successful, a confirmation message will be printed in Red near the botton of the test screen.
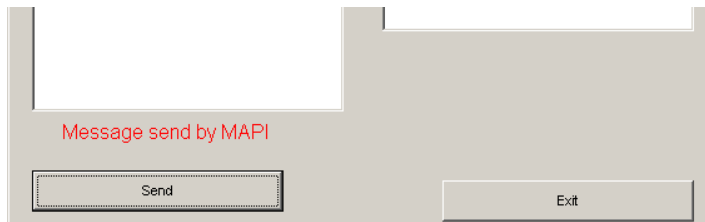
If you encounter a failure in the test, refer to the link indicated below for a possible workaround.

Issues with sending emails in Activities

There is a known issue that can occur within the Activities function. When an activity step involves the sending of an email via *Microsoft's Messaging Application Programming Interface* (**MAPI**). *See Issues with sending emails in Activities in the Troubleshooting section of the Getting Started guide, for possible workarounds.*

When an activity step triggers the sending of an email message, the following screen has been observed:
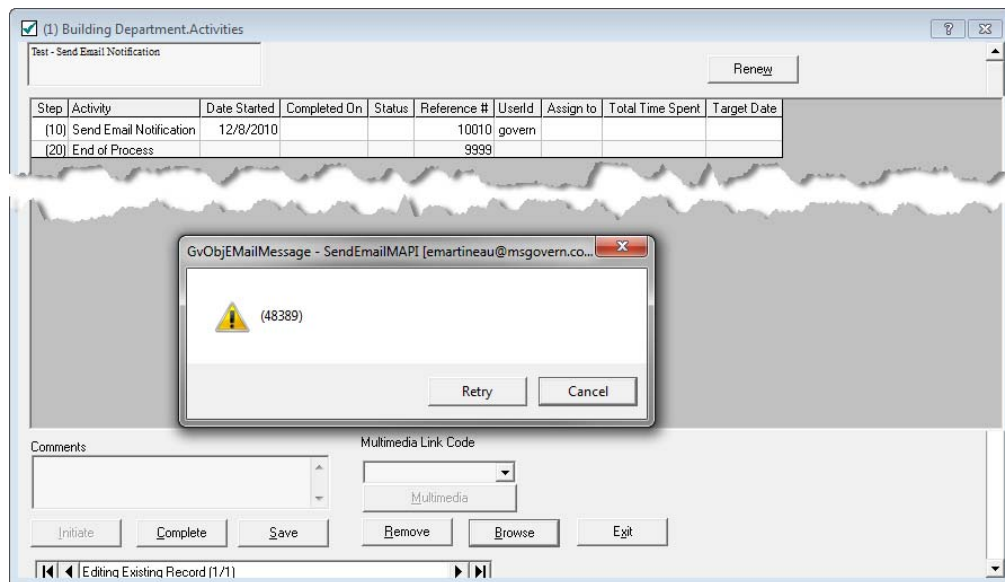
Resolution - Option 1

This issue can be resolved with a Hotfix that is available by request at the following link:

http://support.microsoft.com/kb/980681

Note: The Hotfix package is by request only; an email contact will have to be provided in order to receive it.

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Resolution - Option 2

An alternative resolution is to request from MS Govern Technical Support the **NetEmailerSetup.exe** patch. Installation of this patch will resolve the issue.
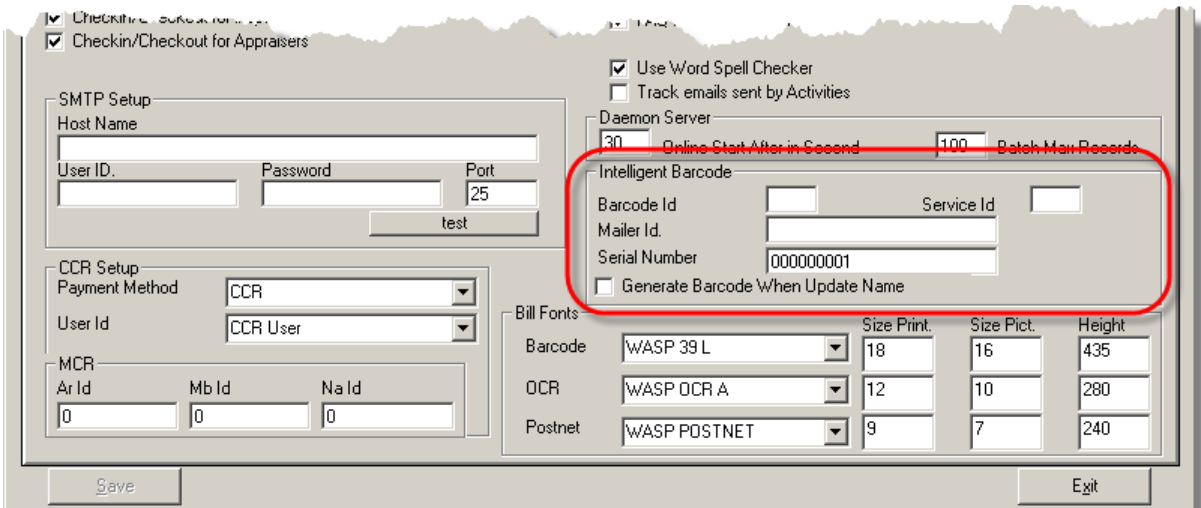
Support for USPS Intelligent Mail Barcodes

> **Note:** Users of the MelissaDATA address verification service should note that Melissa Mail +4 is NOT required for the Intelligent Barcode process. Melissa + 4 is a service for zip code validation and sort order. Although the MelissaDATA service performs a zip code validation, it does not perform the sort order. The sort order is not required because the intelligent Barcode has its own sort order encoded within the code.

NEW The Intelligent Mail Barcode (formerly known as the 4-State Customer Barcode) is used to sort and track letters. Intelligent Mail barcode technology, combines the capabilities of the POSTNET™ barcode and the PLANET Code® barcode into one unique barcode.

For support of the Intelligent Mail barcode, configuration parameters have been added to the *System Registry Maintenence* form. Barcode formats that are supported are IMB_31 and IMB_65.

Intelligent Barcode group

> **Note:** The information for the following fields will be provided by the USPS provider when an application is made. Configuration information can be found on the USPS user gateway at **https://gateway.usps.com/bcg/login.htm**

Barcode ID: This information identifies the presort information. The *Barcode ID* field should be "00" (zero-zero) with the exception of *automation-price eligible flat-sized mail* bearing a printed optional endorsement line (OEL). Enter the ID of the Barcode (2 digits, the 2nd digit must be 0-4)

Service ID: This parameter identifies the class of mail; type the *Service ID* in this field (3 digits). *Users should refer to the USPS Website for information related to the*

Mailer ID: This is the number that uniquely identifies the mail owner or mailing agent; enter a 6 or 9 digit *Mailer Identifier* number.

Serial Number: Specify a serial number. This is a 9 digit code when used with a 6 digit *Mailer ID*, or a 6 digit code when used with a 9 digit *Mailer ID*.

Generate Barcode when update name: Select this option to automatically generate a barcode when a new name is created or an update is made in the *Name & Address Maintenance* function.

System Tables Changes

To implement this feature, the following system changes have been made to format *Name and Address* (in **GovBatch**), and perform *Name and Address* verification with **MelissaDATA** service if installed.

- The IMB_31 and IMB_65 barcode information are generated in the NA_NAMES.IMB_31 and NA_NAMES.IMB_65 tables, respectively.
- Addresses are corrected and formatted in (Table: NA_LK_NAME_ADDRESS)
- IMB_31 and IMB_65 barcodes are generated in other addresses (Table: NA_LK_NAME_ADDRESS).
- Fields added in (Table: NA_NAMES and NA_LK_NAME_ADDRESS).

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![MSGovern logo]

Barcode Setup for OCR and PostNet Billing

Previously, modifications to barcode fonts required special assistance for configuration. With this option, configuration of Barcode, OCR, and PostNet fonts, is now accessible to users with administrator-level access.

Bill Fonts group
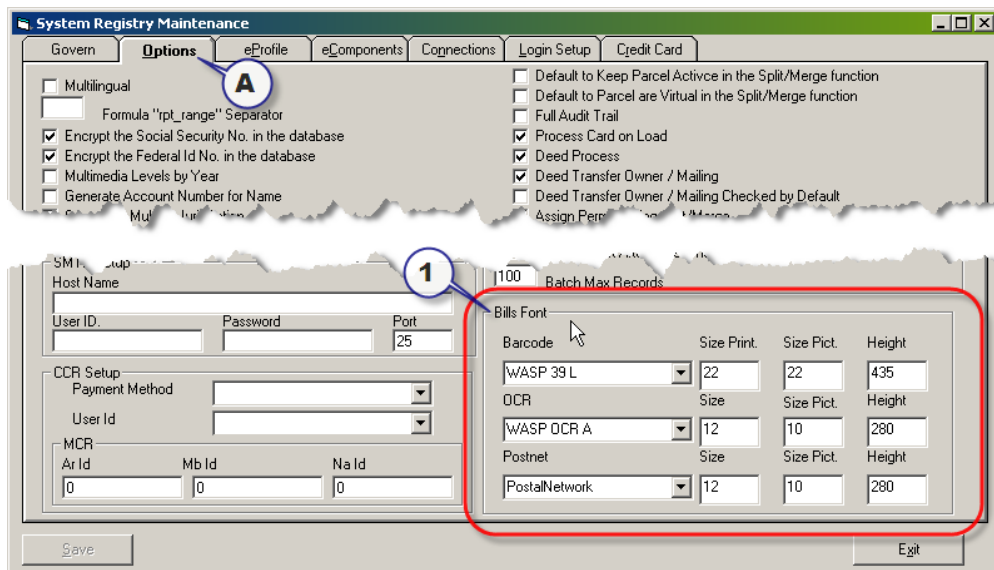
OCR / PostNet barcodes can be generated and included in Govern generated reports such as tax bills, invoices, etc.

Bill Fonts and Crystal Reports

The configuration of Bill Fonts option does not apply to Crystal Reports. Crystal reports are self contained, i.e. their fonts are embedded within the report, and therefore external to Governs administration.

To configure Bill Fonts in *Govern Admin*...

1. Select *Parameters* > **System Registry Maintenance**.

2. In the *System Registry Maintenance* form, select the **Options** tab.

3. Look for the *Bill Fonts* group.

4. In the Bill Fonts group, configure the parameters as per your requirements.

> **Note:** Barcodes and barcode readers are specialized in that users cannot use any barcode font. Refer to the information supplied with your reader or scanning system, to find out what fonts are compatible with your system.

Configuring the USPS Barcode

To configure the USPS Barcode refer to the Getting Started release 10.7 user guide.

CCR Setup group
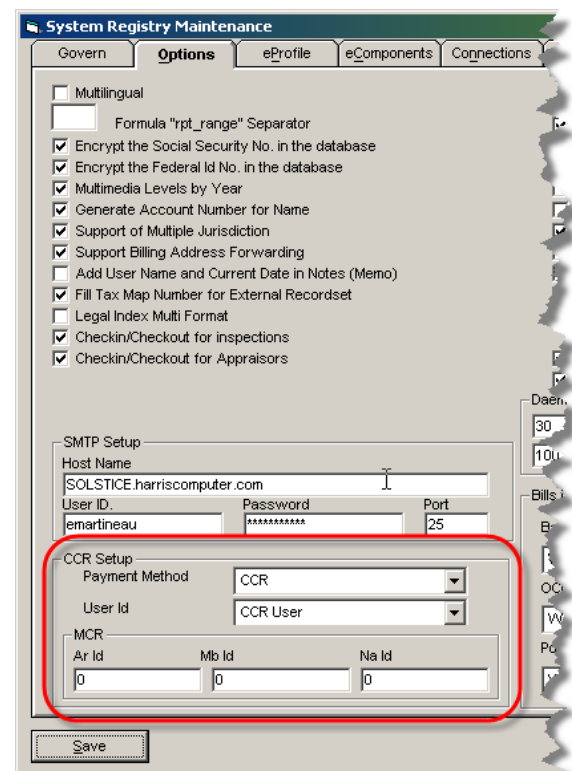
Use the following parameters to configure *Centralized Cash Receipting* (**CCR**). *See CCR Setup on page 176 for more information.*

Payment Method: Select a payment method that was created specifically for *CCR* transactions. *See Validation Tables on page 85 to learn how to create a CCR Payment Method.* (Table: VT_USR_CCTYPE)

User ID: Select a user ID that has been defined for CCR from the drop down menu. *See User Maintenance on page 60 for details on creating a User ID; you might choose an ID called* **CCR Transaction Type***.* (Table: USR_USERFILE)

AR ID (for MCR): Enter an AR_ID that will be used for MCR (Misc. Cash Receipts)

MB ID (for MCR): Type in the MB_ID for MCR (Misc. Cash Receipts)

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> **NA ID (for MCR):** Enter the NA_ID that will be used for MCR (Misc. Cash Receipts)

Connections Tab

Database Connections for Crystal Reports

Database Server: Enter the name of the database server that will be accessed.

Database Name: Type in the name of the database that you are connecting to.

User ID: Enter your user ID to access the database.

Password: Type your password to access the database.

Enable SQL Reporting Services

SQL Server Reporting Services (**SSRS**) is a database reporting solution that is available with Microsoft® SQL Server® (Version 2005 and later). Govern Version 9.5 and above offers support for SSRS.

Note: Users intending to use SQL Server Reporting Services (SSRS) must ensure that the.NET Framework 2.0 or higher is installed on their PC.

Note: For full details on Govern for Windows™ implementation of SQL Server Reporting Services (SSRS), *refer to the "Documentation & Standards for SQL Server Reporting Services" document*.

Server Connection for SQL Reporting group

Server Path: Enter the full path to the SQL report server.

Authentication Type

There are two (2) methods of authentication available when connecting to the report server.

Windows Integrated Security: The *Windows Integrated Security* option is typically used when the *Kerberos* authentication protocol is enabled, or when the servers are all located on the same computer with *Kerberos* disabled. It will pass the login of the current user accessing the report on the server. While using this option, the windows account must exist on the SQL Server machine in order to be able to access the database.

Click this option to use the *Windows Integrated Security*.
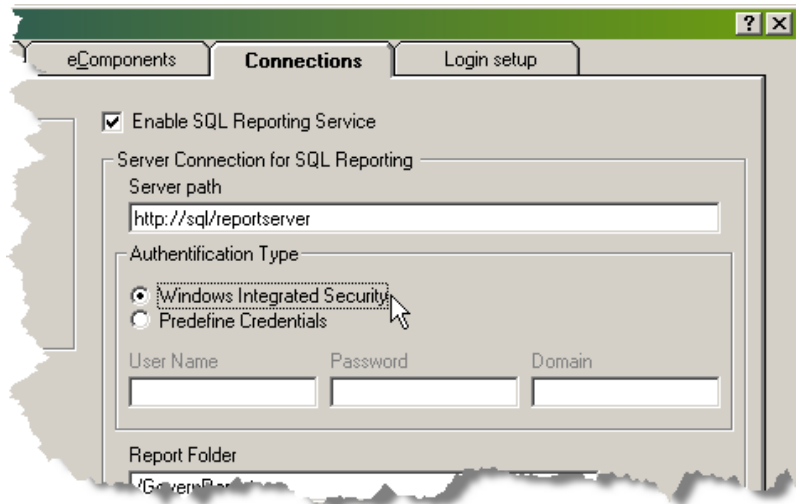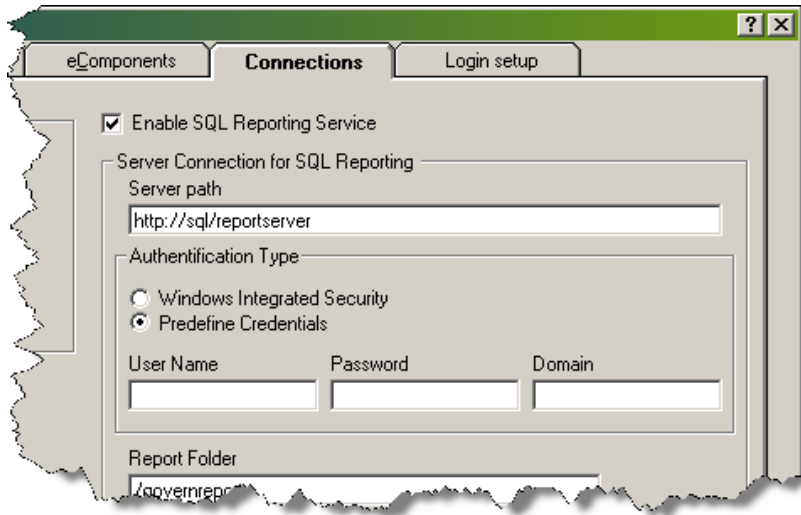
Predefine Credentials: *Predefine Credentials* should be selected when additional access credentials are required for the server.

When the *Predefine Credentials* option is selected, fields to be completed are...:

- **Username** - Type in a username
- **Password** - Enter a password

- **Domain** - Specify the domain that the aforementioned **Username** and **Password** belong to.

Report Folder

Specify a report folder.

Custom Folder

Specify a custom report folder.

Database Connection for SQL Reporting Service

Datasource Type: Choose the datasource from the drop down menu; options are:

- Oracle
- SQL Server

Database Server: Indicate the name of the database server.

Database Name: : Specify the name of the database that will be used.

User ID: : Type in a username.

Password: Enter a password.

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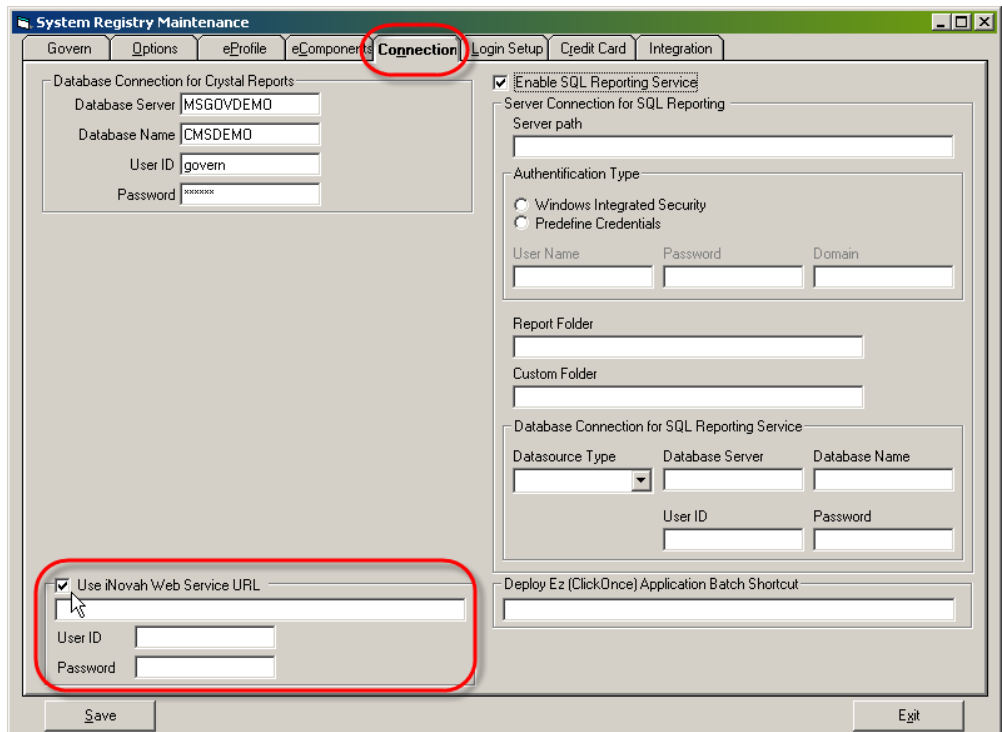
Configuration Parameters for iNovah Integration

NEW New administrative parameters have been added to the Connection tab of the System Registry Maintenance form. This allows entry of parameters required for configuring iNovah integration. There are new parameters to enable and enter the **Web Service URL**, **User ID**, and **Password** used to access the iNovah system.

To use the iNovah parameters...

1. Select *Parameters* > **Edit the System Registry...**
2. Click to select the **Connection** tab.

3. Click to select the **Use iNovah Web Service URL** option to enable the fields.

MS Govern Batch (.NET) can be called from GovBatch
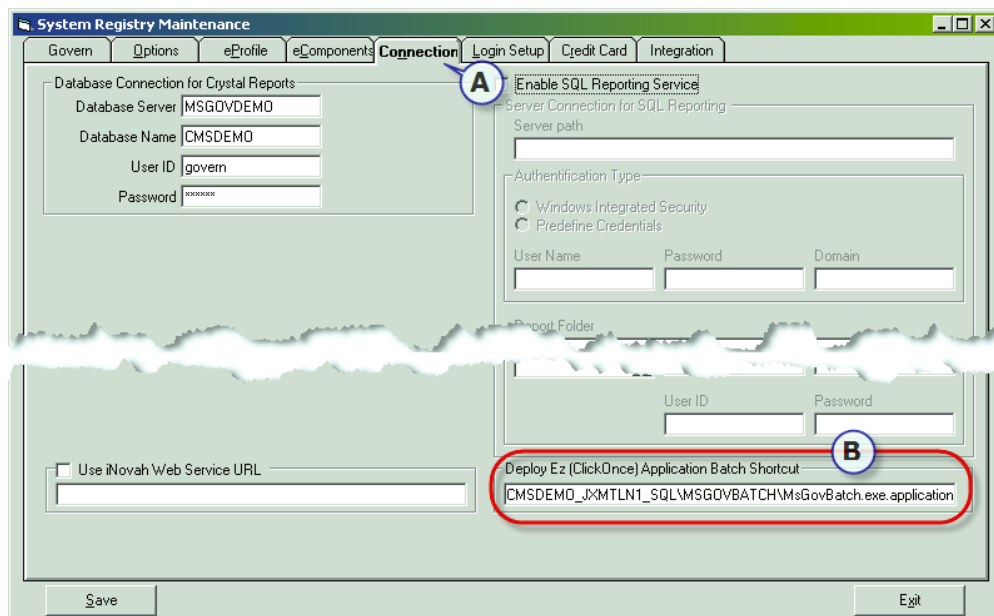
NEW

The MS Govern Batch .NET application can be called from GovBatch release 10.7. This will allow for users of GovBatch to access Govern.NET batch processes.

Note: This functionality is only available to users that have obtained licenses for Govern.NET and have the required applications installed.
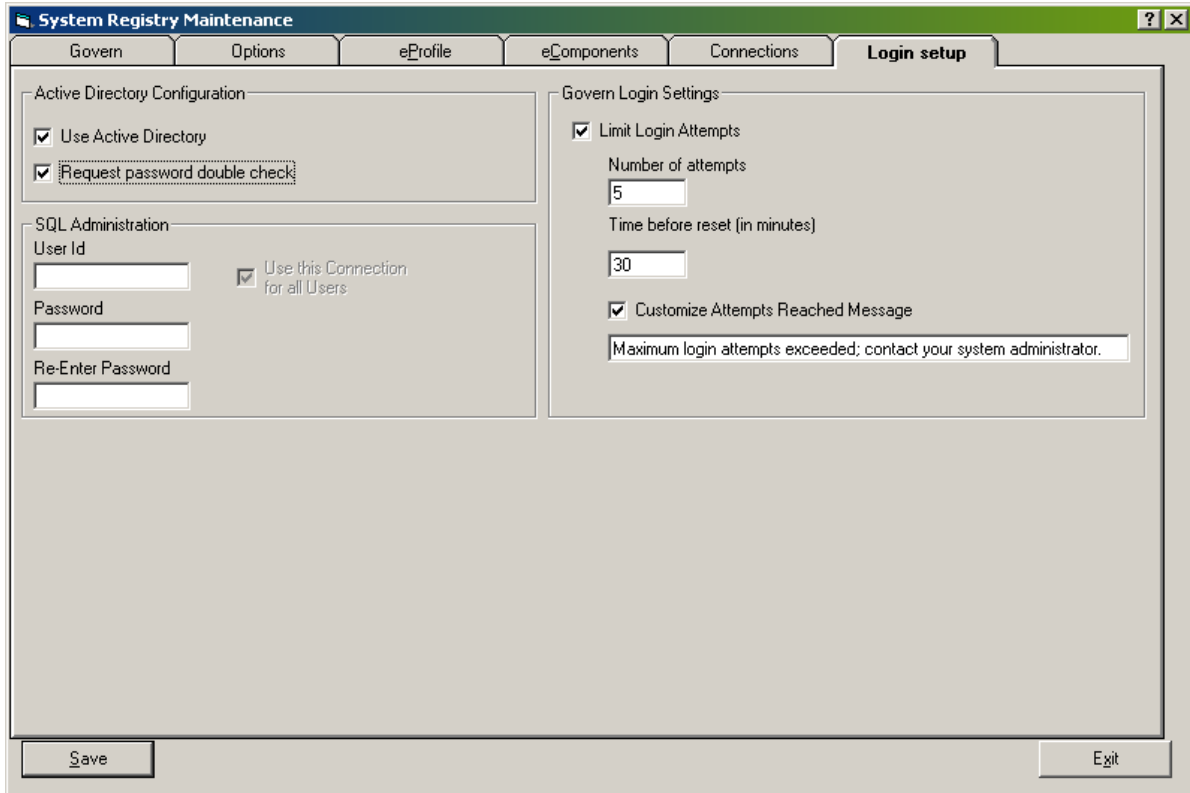
Where to Find...: In Govern Admin.

1. Select *Parameters* > **Edit the System Registry...**

2. In the *System Registry Maintenance* form, click the **Connections** tab (**A**).

3. Locate the DeplyEZ (ClickOnce) Application Batch Shortcut (**B**) parameter.

Login Setup tab

Login Setup tab parameters

Active Directory Configuration group

> **Note:** It is critical that Active Directory is properly configured and synchronized with Govern before selecting this option; failure to do so can result in an inability to access your database. *Refer to the Govern Integration with Active Directory guide*

Use Active Directory: Click this option to use **Active Directory**.

> **Note:** When this option is not selected, the parameter to enter Users Inactive Date will be inactive, i.e. this option is disabled when Active *Directory* is not being used.

Request password double check: Select this option if you would like to enable password confirmation.

SQL Administration group

User ID: Enter your SQL Administrator user ID.

Password: Type in your password.

Re-Enter Password: Re-enter your password for confirmation.

Use this Connection for all Users: Click this option to indicate that all users will be using this connection.

Govern Login Settings group
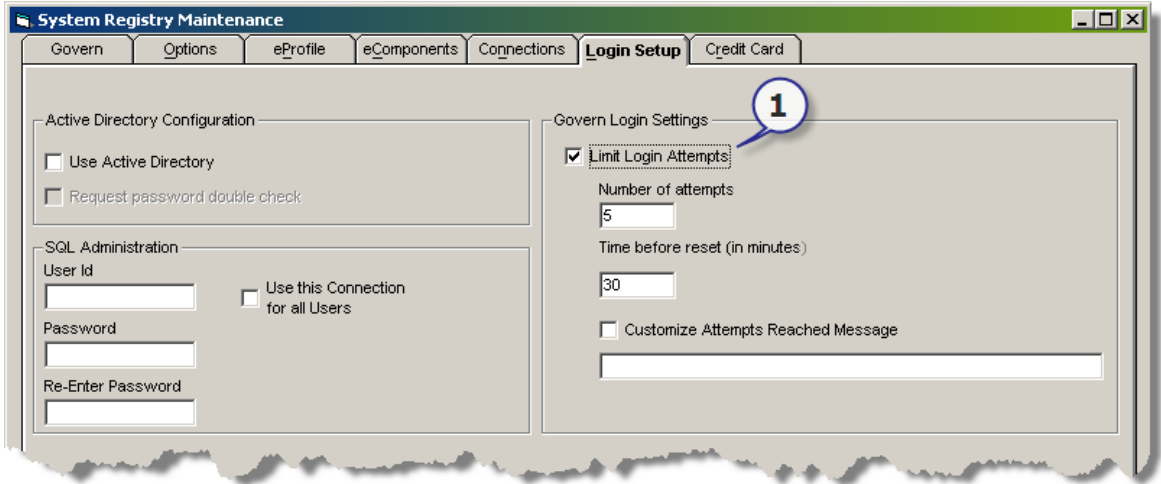
Number of Attempts to Access Govern

It is possible to set a maximum number of user access attempts in *Govern*. As an administrator, it is possible to:

- View details of all successful and unsuccessful logins

- Clear the log files

- Create a custom error message for that will be displayed to the user.

Note: In order to use this function, it will be necessary to be logged in with a valid SQL Administrator account password.

Limit Login Attempts: Click this option to limit the number of login attempts allowed by the user. If not selected the user will have an unlimited number of attempts.
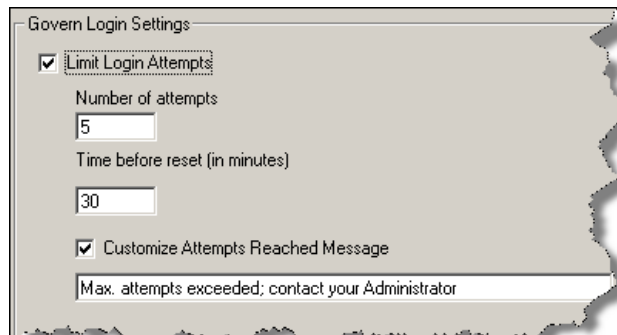
Number of Attempts: When **Limit Login Attempts** is selected, enter the desired number of attempts that will be given to the user to access Govern.

To set *Number of Attempts:*

1. In the Govern System Administration window Select **Parameters** > **Edit the System Registry...**

2. Select the **Login setup** tab.

3. In the *Govern Login Settings* frame, click *Limit Login Attempts* to activate the fields.

4. In the *Number of Attempts* field, enter the number of attempts that the user will be allowed.

Time before reset (in minutes): When **Number of attempts** has been specified, and the user has failed to login successfully, this is the mandatory wait time before the user can make another login attempt.

To set the *Time before reset* (in minutes):

1. In the Govern System Administration window Select **Parameters** > **Edit the System Registry...**
2. Select the **Login setup** tab.
3. In the *Govern Login Settings* frame, if not already selected, click *Limit Login Attempts* to activate the fields.
4. In the *Time before reset (in minutes)* field, enter the amount of minutes before reset.

Customize Attempts Reached Message: Type in this field the message that the user will see in the event of a failed login attempt.

> **Sample Message:**
> *Maximum login attempts reached; contact your System Administrator.*

> **Note:** There is a maximum of 256 characters including spaces allowed in this field.

To create a *Custom Error Message*:

1. Select *Customize Attempts Reached Message*,
2. Type a message of up to 256 characters in length, including spaces.
3. Click **Save**.

Manage User Login

As part of the enhanced security features of Govern, the **Manage User Login** feature allows the Super User to administrate the Govern Login settings. When a user has exceeded the maximum number of login attempts permitted they will have to wait for the set number of minutes before the system allows another attempt. Only an administrator is able to override the **Time before reset** option.

The **Manage User Login** feature allows an administrator to reset any user that has exceeded the system allowed number of tries.

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To access the User Login Management screen:

1. In *Govern Admin* select *Parameters* > **Manage User Login…**
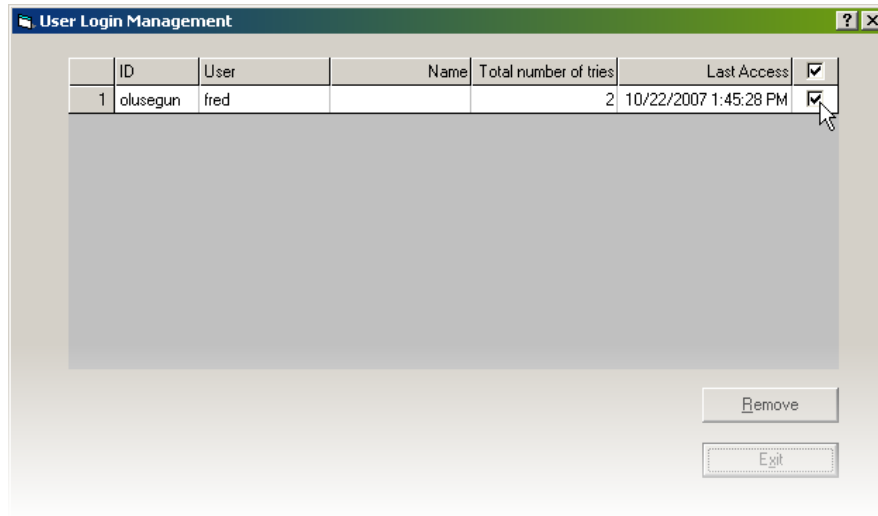
2. Locate the user that has exceeded the maximum number of attempts in the list.

3. Select the checkbox in the last column, click **Remove** to reset the user.

4. A confirmation screen will appear, click **Yes** to reset the user.
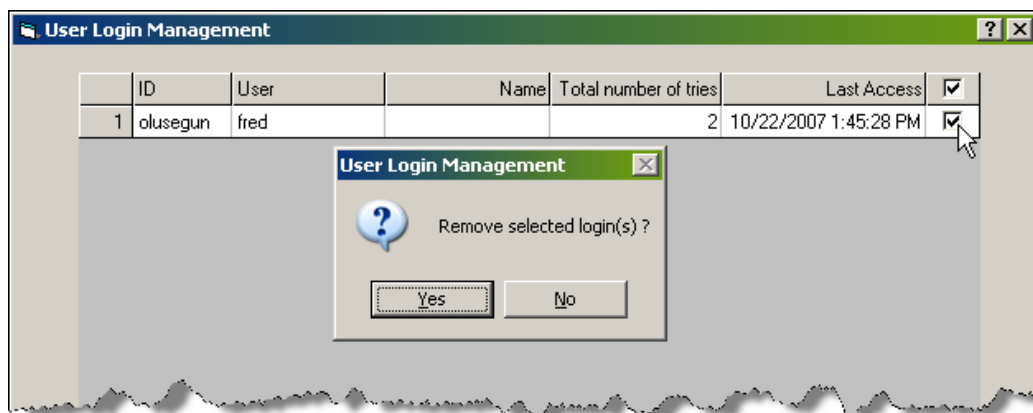
After the user has been removed from the list, they will once again be able to attempt to access Govern with their same preset number of attempts.

User Registry Maintenance
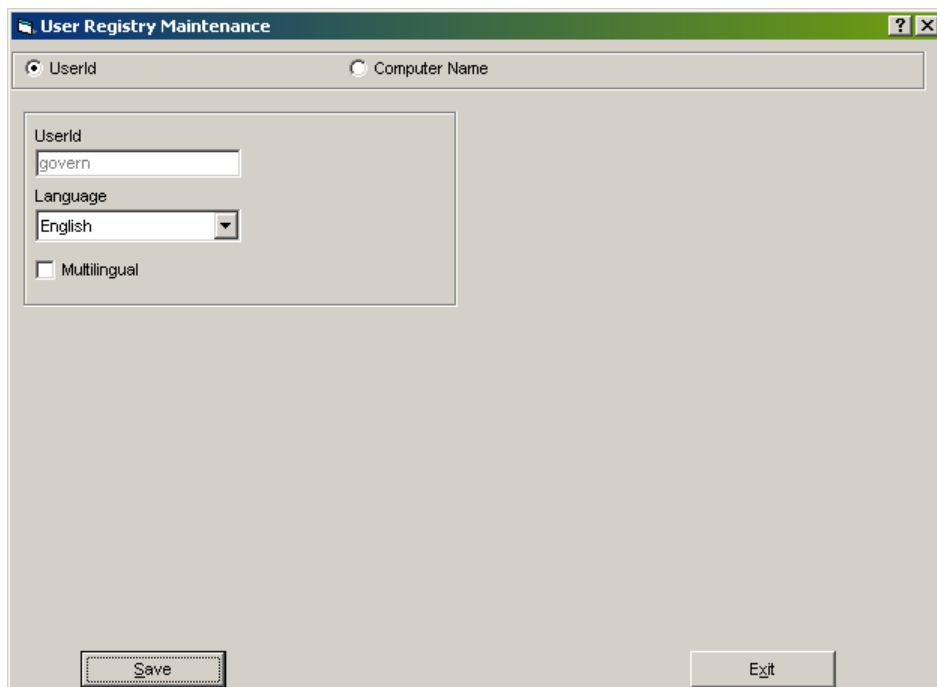
Overview

Define default parameters at the user-level on the *User Registry Maintenance* form. These parameters include user identification and the default language by computer; default paths to the Help files, bitmaps, reports and query definitions; GIS definitions; such as GIS link type, project, view and theme, P_ID column name; Melissa data and the *Document Locator External* folder. These parameters are saved to the SY_REGISTRY and USR_REGISTRY tables.

Note: Certain parameters are also set on the *System Registry Maintenance* form. Those set for the user have precedence over those set at the system level.

To access this form, from Govern's main screen:

1. Select **Tools** > **System Administration (Govadm32.exe)**

2. In Govern Admin select **Parameters** > **Edit the User Registry**

![MSGovern logo]
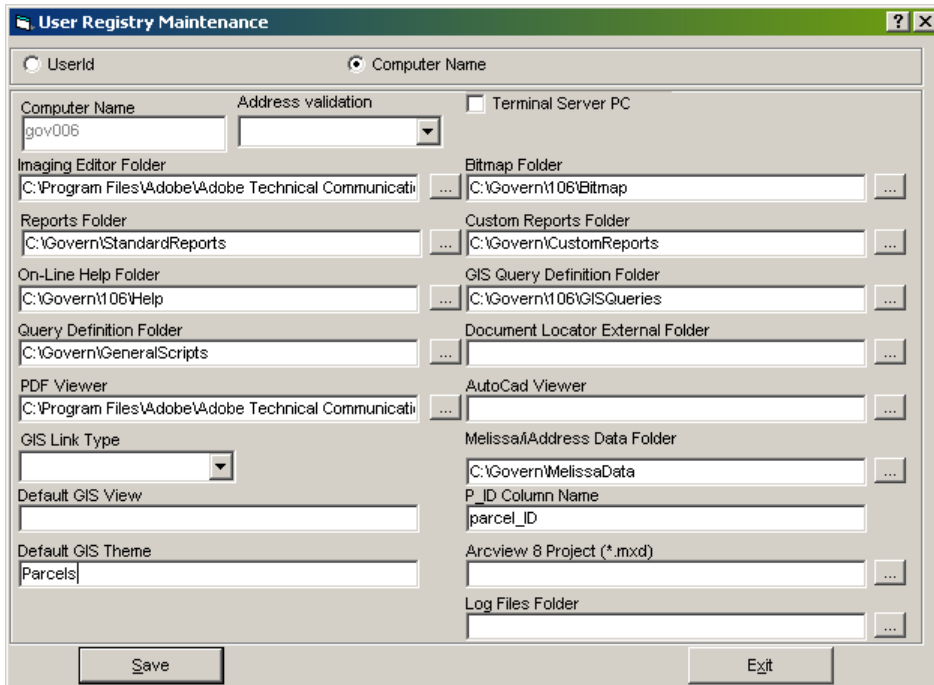
User ID: This field displays the current User ID.

Language: This field displays the default language defined for the current user. To change the default language, select an alternate from the drop-down list.

Multilingual: Select this option if you are supporting two or more languages, for Govern functions; for example, if you are supporting English and French or English and Spanish. You also need to set this option on the *System Registry Maintenance form*.

Saving Parameters by User ID

Click **Save** to save the selected language for the displayed User ID. These parameters are saved in the USR_REGISTRY table (KEY_TYPE = 1).

Saving Parameters by Computer Name

Click **Save** to save a new *User Registry Maintenance* setup, or modifications to an existing one, for the current *Computer Name* to the USR_REGISTRY table (KEY_TYPE = 2).

Computer Name: This field displays the current Computer Name.

NEW **Address validation:** Select an Address validation application option from the drop down menu. Available options are *Melissa* or *iAddress*. To specify no verification application, leave blank this parameter blank.

Terminal Server PC: Select this option if you are running Govern through a Terminal Server on a network. An identification label is automatically assigned to each terminal. This is made up of the user ID appended to the terminal server name. Four digits are reserved for the user identification and 11 for the server name.

Use Melissa Data: Select this option if you are using *Melissa* address verification.

Entering User Registry Maintenance Paths

You can now select the drive and directory to define the required paths for the *User Registry Maintenance* information
.

> **Note:** You can enter Universal Naming Convention (UNC) commands for the path information instead of entering a map to the drive. Enter double backslashes for the server name and single backslashes to identify the directories; i.e., \\servername\path.

Bitmap Folder: Enter the path for the Bitmaps folder. To select the path,

click [ ] Then, select the drive and directory. The full path is displayed along the bottom of the form. Click **OK**

FINAL DRAFT

Find Directory

UNC Path [   ]

[▼] c:

- C:\
  - Govern
    - 106
      - **Bitmap**
        - Button
        - Other
        - Report
        - Treeview

C:\Govern\106\Bitmap

[_Ok_]   [E_xit_]
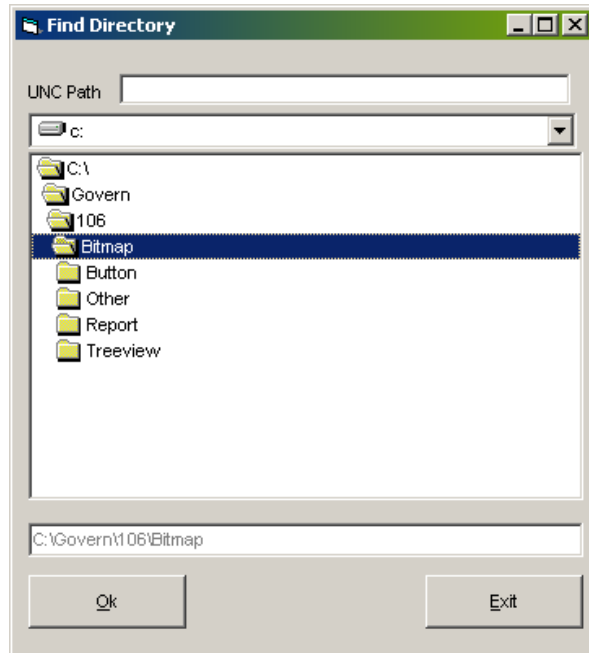
Imaging Editor Folder : Enter the full path to the Image Editor.

Note: Once a valid path is entered, the **Imaging Editor** option will be enabled on the **Tools** menu in Govern.

GIS Folder & Scripts (or ArcView 8 Project (*.mxd)):

If you are using Arcview 8.x or Arcview 8.x with Tax Map #, enter the path as in the following example:

c:\Govern\gis\gis\govern31.mxd

Otherwise, enter the path as follows:

GIS=C:\ESRI\AV_GIS30\ARCVIEW\BIN32\arcview.exe c:\Govern\
gis\gis\govern.apr govern,govern

Reports Folder: Enter the path for the **Reports** folder. These are the standard reports included in the Govern package.

> **Note:** Before setting up your directory paths to the standard reports, on the *System Registry Maintenance* and *User Registry Maintenance* forms, ensure that you open the directory for your state and copy the reports to the **Standard Reports** directory. *See Appendix A: Standard Reports on page 320 for details.*

Query Definition Folder: Enter the path for the Queries folder.

Online Help Folder: Enter the path for the On-Line Help folder.

PDF Viewer: Enter the full path and executable (.exe file) for your PDF Viewer, in order to display PDF files, directly from the *Multimedia Information* and *Multimedia by Name* functions, in the specified viewer. This path can also be defined on the *System Registry Maintenance* form.

AutoCAD Viewer: Enter the full path and executable (.exe file) for your AutoCAD Viewer, in order to display AutoCAD files, directly from the *Multimedia Information* and *Multimedia by Name* functions, in the specified viewer. This can also be defined on the *System Registry Maintenance* form.

NEW **Melissa / iAddress Data Folder:** Depending upon your choice for an address verification application, enter the path to the *Melissa DATA* **or** *iAddress* folder. This is important if you are running Govern offline. *SeeOption to Use iAddress for Address Verification on page 59.*

> **Note:** You should enter the path to the data folder in the System Registry Maintenance form.

If you are including *MelissaDATA's Residential Business Delivery Indicator* (**RBDI**) add-on with your existing *Melissa Address Verification* service, place this in the same directory. *Refer to the Property Control guide for details.*

GIS Link Type: Select the **GIS Link** from the drop-down list or leave this field blank to use the default GIS link type set on the System Registry Maintenance form.

GIS Link	Definition
ArcView 8.x	ArcView 8.x application
ArcView 8.x Tax Map #	ArcView 8.x application with search by Tax Map Number
JMap	Kheops application
MapInfo	MapInfo application
Horus	Kheops application
No	None
Test	Test
Yes	ArcView 3.3 Application

P_ID Column Name: After entering the GIS *View* and *Theme*, enter the P_ID column name, associated with the shape file to be used with the GIS application. When the application is loaded, the records in this column, matching those in the current recordset are highlighted.

Tax Map Column Name: After entering the GIS *View* and *Theme*, enter the Tax_Map column name associated with the shape file to be used with the GIS application, if you are using ArcView 8.x with Tax Map Number. When the application is loaded, the records in this column, matching those in the current recordset are highlighted.

Default GIS View: If you have selected ArcView 8.x GIS link type, then you must enter the GIS View to be used as the default.

Default GIS Theme: If you have selected ArcView 8.x GIS link type, then you must enter the GIS Theme to be used as the default.

Bitmap Folder: Enter the path for the Bitmaps folder.

Custom Reports Folder: Enter the path for the Custom Reports folder. Custom Reports are created specifically for a client or by the client.

FINAL DRAFT

Document Locator External Folder: Specify the path for the external multimedia directory.

Option to Use iAddress for Address Verification

NEW

If you wish to use the *iAddress* address verification application, you must select the *iAddress* option under *Address Validation* in the *User Registry Maintenance* form.

Note: A user license for the iAddress application is required.

To specify *iAddress* as an address verification application in *Govern Admin...*

1. Select *Parameters* > **Edit the User Registry...**; in the User Registry maintenance form, click the *Computer Name* option (**A**).
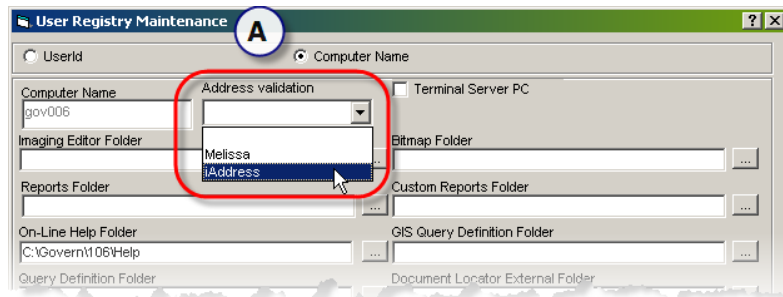
2. Select the iAddress option from the drop down menu; click **Save**.

3. From the menu, select *Parameters* > **Edit the System Registry...**

4. In the *System Registry Maintenance* form, manually enter the path to the *iAddress* data folder (**B**) or click "**...**" to navigate to the target directory.

FINAL DRAFT
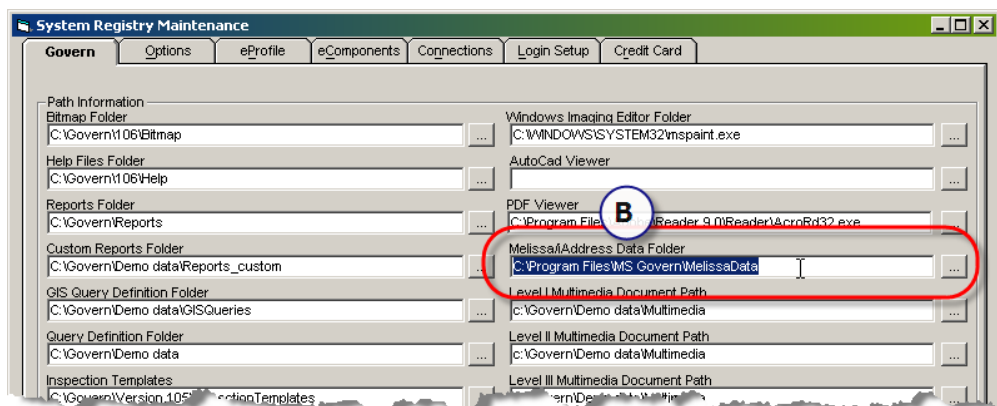
User Maintenance

📖 Overview

The *User Maintenance* form is used to maintain user data. In this form form, you can create new users, set access rights, or remove user profiles that are no longer active.

This form also includes a tab for setting access rights to the *Mass Appraisal Validation Tables. Refer to the Mass Appraisal General Information guide for details.*

To access this form, from *Govern's* main screen, select *Tools* > **System Administration (Govadm32.exe)**

OR

Click **Applications** in the *Side Navigation Bar to display Govern applications*

5. In *Govern Admin* select *Setup* > **User Maintenance**

User Maintenance Command Buttons

Creating a User: Click **New** to clear the form and create a new user profile.

Saving a User Record: Click **Save** to save a new user profile or modifications to an existing one.

Deleting a User: Click **Delete** to remove the current user record.

Browsing User Records: Click **Browse** to view a list of the existing user profiles.

Exit: Click **Exit** to close the form. A confirmation message appears if there are any unsaved modifications.

User Maintenance Parameters

User ID: Enter the user identification required for login.

Password: When Govern is installed as *client/server*, the user ID and password from the server are used and a password is not mandatory. If a password is to be used, it is encrypted in the database and is not displayed on the screen.

Name: Enter the full name of the user.

Group of Users: Select a group for the user, if required.

> **Note:** A user can be a member of a single group only. If a user is already a member of one group and you add the user to a second group, the user is automatically removed from the first group.

> **Note:** User access rights override group access rights.

Creating a Group of Users

1. Click the ± button to the right of the **Group of Users** list box. This opens the *Group Validation Table Header* form.

2. Create the group as defined under *Creating a Group on page 75*.

3. Add users to the group by selecting them from the drop-down list.

> **Note:** A user can be a member of a single group only. If a user is already a member of one group and you add the user to the selected group, the user is automatically removed from the first group.

Primary Department: Select the *Primary* or default department for the current user. The primary department is important for the following reasons:

- This department is automatically selected when the user launches Govern.

> **Note:** If you are using ArcView® with Govern, users need to be assigned a Primary Department, in order to launch Govern directly from the GIS application.

- The default fiscal year of this department is used by default in Govern Admin and Govern Batch Processing.

> **Note:** Once the default year is changed, using the **Set Default Year** option in the **File** menu in Govern Admin or Govern Batch Processing, the application uses this year instead of the default.

Creating a New Department

Open the *Department Setup* form, in order to create a new department or make a modification, click the ± button. *See Department Setup on page 101 for details on this form*.

E-Mail Address: Enter the user's e-mail address. This e-mail address is used in the *Messaging System* function within the Permits & Inspections sub-system.

Language: Select the default language for the current user.

Inactive Date: Enter an expiration date for the account; i.e. the date after which the account is no longer active.

Initials: Enter the initials of the user; use a maximum of three (3) letters.

Enable Outlook Scheduling: Select this option to link Microsoft®

Outlook® to the *Inspection* function for scheduling. Inspections can be automatically added to the Outlook Calendar or Task List. *Refer to the Permits & Inspections guide for details.*

Lite User: Select this option to designate the user as a *Lite User* and limit access to options on the *Property Control Search* screen. The following screen is used in place of the screen.

Disable Editing on Query by SQL: Select this option to restrict the selected user from modifying or deleting SQL queries on the *Query by SQL* function in *Govern*. The user will be able to select and execute stored queries but unable to make changes, to create new queries or to select queries from another file. The *Edit* box, **Retrieve SQL** and **Save SQL** buttons are disabled:
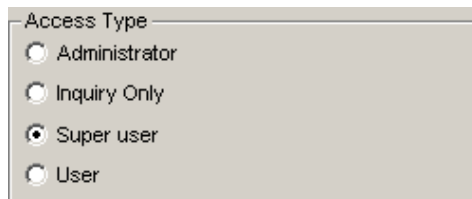
Note: User with Super User or administrator rights can run Action or Selection queries, from this function. Other users can run Selection queries only. See *Selection Queries* and *Action Queries on page 216* for details on queries.

Access to Inspector Web Services: Select this option to allow the selected user to have access to the Mobile Inspections web services.

Access Types

There are four (4) user access types in Govern: (Table: VT_SY_USR_TYPE)

- **Super User**: giving the user access to all functions, all forms and all features, including the system tables.

Note: Super User Access must be used with caution. Improper use may harm the integrity of the software. For security reasons, User accessibility should be limited.

- **Administrator**: giving the user access to all menu options with the exception of the system tables. This type is recommended for the *System Administrator*.
- **User**: gives the user access to the functions and forms assigned by an administrator or *Super User*.
- **Inquiry Only**: offers the user *view-only* access to the functions and forms defined by an administrator with *Super User* rights. *See Inquiry Only User Access on page 65.*

Inquiry Only User Access

You can set **Inquiry Only** access for users or clients who need to view, but not modify data.

A different license can be purchased for these users. This information is displayed on the Govern Admin **About** box, available through the **Help** menu.
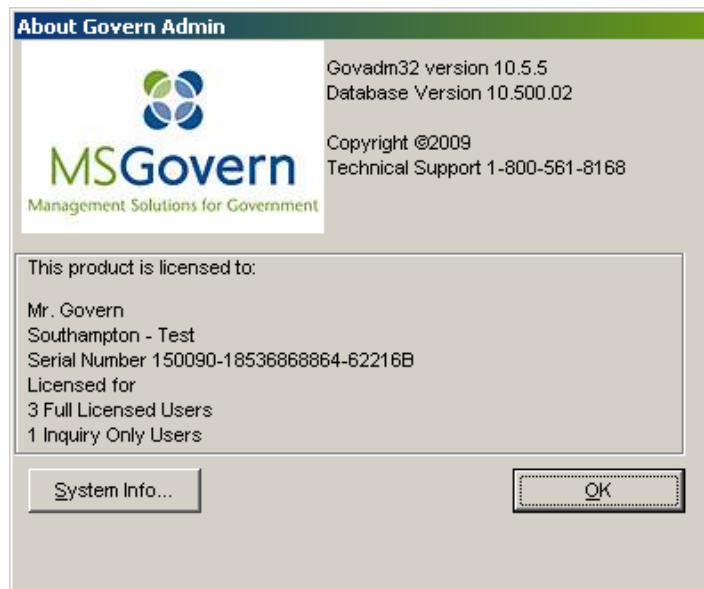
See the following sections for more information on user access:

- *Department Setup on page 101*
- *Functions Setup on page 123*
- *Menu Security Setup on page 72*
- *Groups of Users on page 74*
- *Dataset Source Setup on page 98*

- *Providing Access to a Jurisdiction on page 76*

Super User and Full Access Rights

When you set user access rights to the functions, there are also four levels of Access Types:

- Full Access Rights
- Create Modify and Delete
- Create and Modify
- Inquiry Only

The following table lists the permissions, by function, that are available only to Super Users and to those assigned Full Access Rights to the specified function.

Note: Super Users are automatically assigned Full Access Rights to all functions.

See Functions Setup on page 123 for more information on assigning user access to the functions.

Function	Full Access and Super User Rights
A/R Inquiry	Add notes and payment plan information Modify Due Dates with removal of a protest flag Reapply Payment Plan Distribution records and recompute *Summary Record Card* data Recalculate penalties and interest Modify ACH Information
ACH Information	Modify the **Prenoted** option, on the *ACH Information by Name* function, that indicates the account was included in the *Prenotification* batch process. Modify the ACH Information selected for the *Real Estate* and *Utility Billing Mailing Indexes* or *Personal Property*, *Motor Vehicle*, *Boat* and *Aircraft Excise Tax Maintenance* functions. The **ACH Information** selection option is visible only to users with Full Access Rights to these functions.

Function	Full Access and Super User Rights
Historical Year	Modify data in *Historical Mode*
Inspections	Modify an *Inspection* record with *Completed* status.
Name and Address Maintenance	See *Department Setup on page 101* for information on access rights for name and address records.
Payment Data Entry	Modify or override interest charges.
Permit, Workflow and Offense functions	Modify the **Permit**, **Workflow** or **Offense Number** even after the permit is completed. Delete the **Historical** flag, after it has been set.
Property Location	Delete all property location records, even sequence 0 records
Query by SQL	Execute *Action Queries*. Other users can execute *Selection Queries* only.
Real Estate and Utility Billing Mailing Indexes	Modify the *Mortgage* company record.
System Activities	Delete an *Activity*.
System Tables	Delete *System Tables* (Super Users only)

Allow Creation of... group

Select the following options, as applicable, to provide security for property and name and address records. *See Privacy / Restrictions for Names group on page 105 for full details on protecting name and address records*:

- **Parcels**: Select this option to permit the user to create new parcels. Otherwise, deselect the option.
- **Names**: Select this option to permit the user to create new name and address records. Otherwise, deselect the option.
- **Flags**: Select this option to permit the user to add and remove messages to and from property records. Messages can be set up for the department or for the organization, using the **Department Flag** and **Global Flag**

options in Govern. The message is then viewed by all members of the department or organization, when accessing the record.

> **Note:** Messages can also be added to a property through the Accounts Receivable Inquiry function. *Refer to the Accounts Receivable guide for details*.

Jurisdiction

A *Jurisdiction* is a defined area that a user has power or authority to apply the law; to grant the user access to a jurisdiction, select the jurisdictions, from the lower drop-down list. This list box contains the jurisdictions created in the user validation table, VT_ USR_JURISD.

> **Note:** This feature is enabled only if the **Support of Multiple Jurisdictions** option is selected on the System Registry Maintenance form.
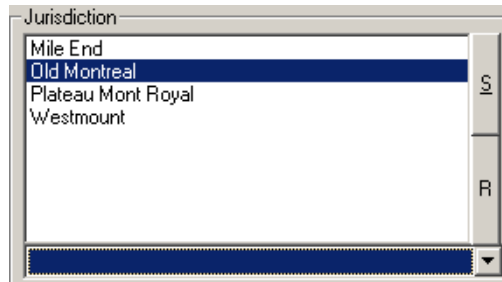
> **Note:** Only a Super User has automatic access to all jurisdictions.

You can also set user access rights by jurisdiction. For example, you can grant *Full Access Rights* to some jurisdictions and *Inquiry Only* access to others. Previously, you could only grant or deny access. Now, you have four levels of access rights:
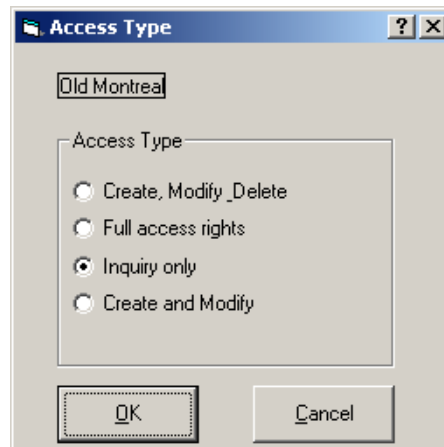
- **Full Access Rights**: The user can view, create, modify and delete data including the **historical data** for the specified jurisdiction.
- **Create, Modify, Delete**: The user can view, create, modify and delete data for the specified jurisdiction.
- **Create and Modify**: The user can view, create and modify data for the specified jurisdiction.
- **Inquiry Only**: The user is only able to view the data in the specified jurisdiction.

To grant access rights to a jurisdiction:

1. Select the user record you want to modify.

2. Select the jurisdiction from the **Jurisdiction** drop-down list.

3. Highlight the jurisdiction in the list box.

4. Click **S** to open the *Access Rights* screen.

5. Select the applicable **Access Type** from the list.

6. Click **OK**.

7. Repeat steps 3 to 6 for each jurisdiction the user can access.

To remove all access rights to a jurisdiction:

1. Select the user record that you want to modify.

2. Highlight the jurisdiction in the list box.

3. Click **R**.

You can also set up group access rights to the jurisdiction using the *Group of Users* form. *See Groups of Users on page 74.*

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Dataset Source

This list box displays the Dataset Sources the user can access in order to retrieve records. Select additional **Dataset Sources**, from the drop-down list, (Table: VT_SY_APPL). Click **Save** after you have made your selection(s).

For more information on Dataset Sources, see Dataset Source Setup on page 98.

Removing a Dataset Source: To remove a *Dataset Source*, highlight it in the list and click **R**.

Dataset Source Access by User and Group: Highlight a *Dataset Source* in the list box and click **S**, to view lists of the users and groups who have access rights.
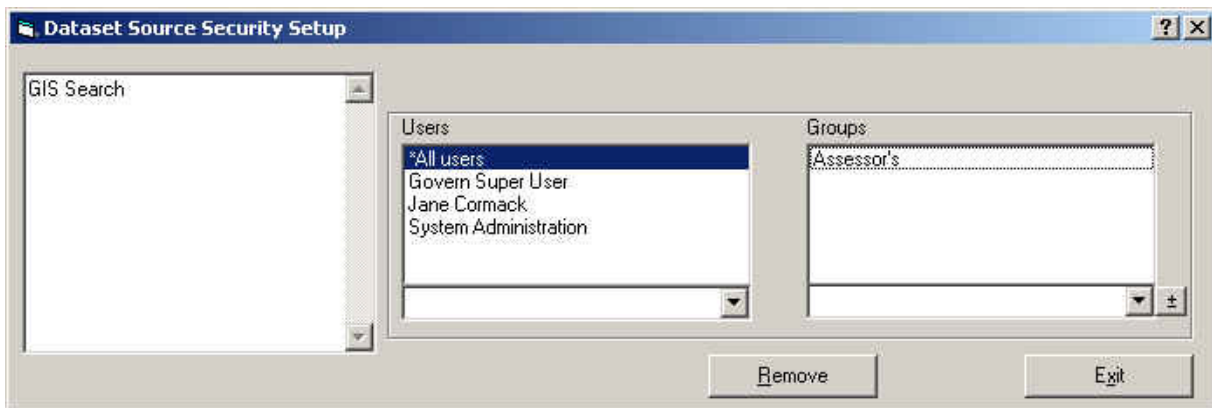
The selected *Dataset Source* is displayed in the list box on the left.

Users: This list box displays the users with access permission to the current record.

Selecting Users: To provide additional users access to the selected *Dataset Source*, select them.

Groups: This list box displays the groups with access to the *Dataset Source*.

Selecting Groups: Select the groups from the drop-down list or click ± to open the *Group* validation table and create a new group. *See Group Validation*

Table on page 75.

> **Note:** User access rights override group access rights.

Removing User or Group Access to the Dataset Source: Select the users or groups in the applicable list and click **Remove**.

Menu Security Setup

📖 Overview

Launch the *Menu Security Setup* form to set access rights to the forms and features in Govern Admin.

> **Note:** You need to set access rights for users assigned User Access Type rights. By default Super Users and Administrators have access to all Govern Admin forms. *See Access Types on page 64 for full details*.

To access this form, from Govern's main screen:

1. Select *Tools* > **System Administration (Govadm32.exe)**

2. In Govern Admin select *Setup* > **Menu Security Setup**
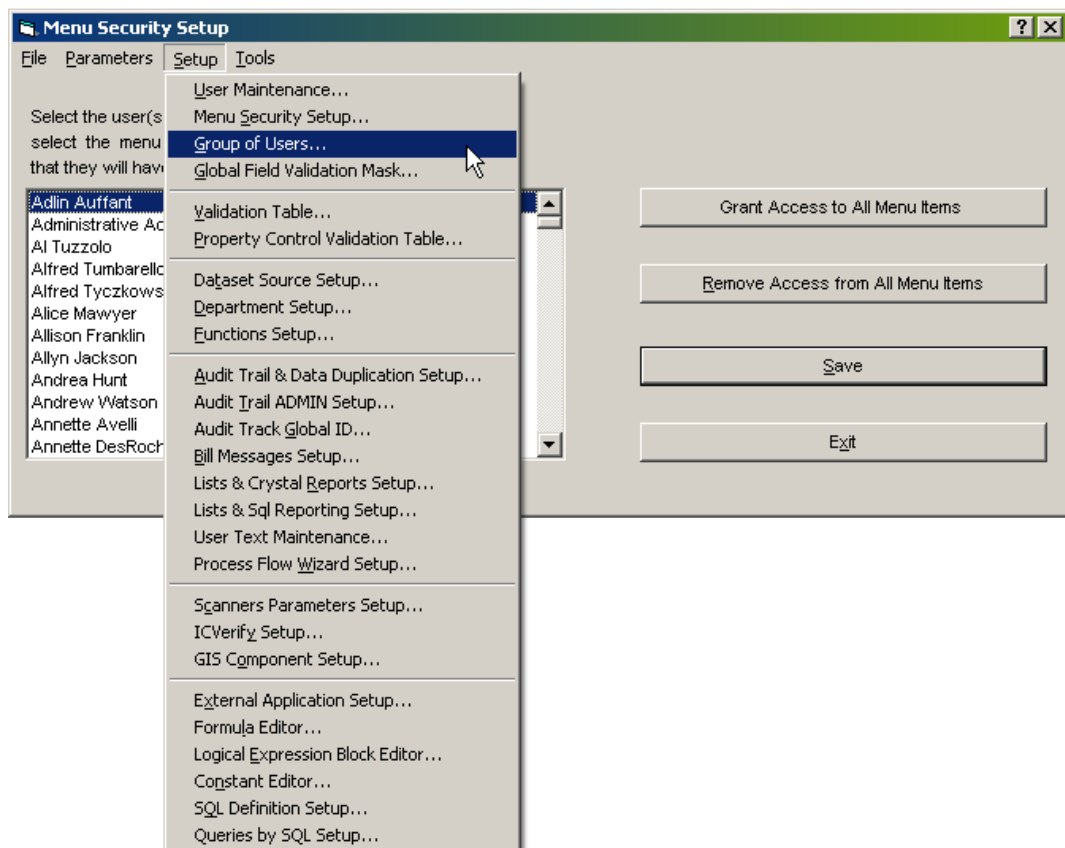
Granting and Restricting Access to the Batch Forms

To grant or restrict access to a Govern Admin form:

1. Select the user or users from the list box.

Tip: You can select as many users as you like at the same time. To select a number of users that are listed consecutively, select the first user, then hold down the Shift key and select the last in the list. If the users are not listed consecutively, hold down the Ctrl key while selecting them. To deselect a selected user, hold down the Ctrl key and reselect the user.

2. Select the menu, where the form is listed.

3. Select the form to grant access. Deselect it to restrict access.

	The user has access to all forms and features that are selected on the menu.

4. Click **Save**.

5. Click **Exit** to close the form.

	Click **Grant Access to all Menu Items** to grant the selected users access to all features and processes in Govern Admin.
Grant Access to All Menu Items	

Tip: To restrict access to specific forms, you can open the menus and deselect the forms.

	Click **Remove Access to all Menu Items** to block the selected users from all forms and features in Govern Admin.
Remove Access from All Menu Items	

Tip: To grant access to specific processes, you can open the menus and select the forms.

Groups of Users

📖 Overview

Define groups of users and set access rights on the *Groups of Users* form. Enhance security by setting permissions by jurisdiction.

Note: In Govern, a user can be a member of a single group only.

To access this form, from Govern's main screen:

1. Select *Tools* > **System Administration (Govadm32.exe)**

2. In Govern Admin select *Setup* > **Group of Users**
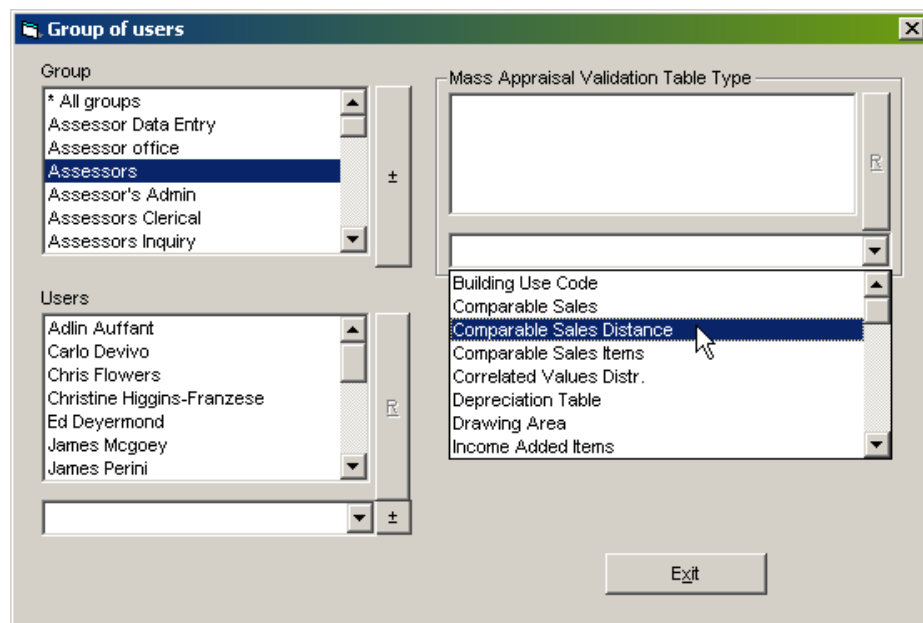
Group: The **Group** list box displays all the groups that have been defined in the system. When you select a group in this box, the group members are displayed in the **Users** list box.

Users: The **Users** list box displays all the users who are members of the selected group. To add a user to this list, select the user name from the drop-down list. To remove a user from the list, select the user and click **R**.

Jurisdiction: The **Jurisdiction** list box displays the jurisdictions that the selected group can access. To provide access rights to a jurisdiction, highlight the group, then select the jurisdiction from the drop-down list.
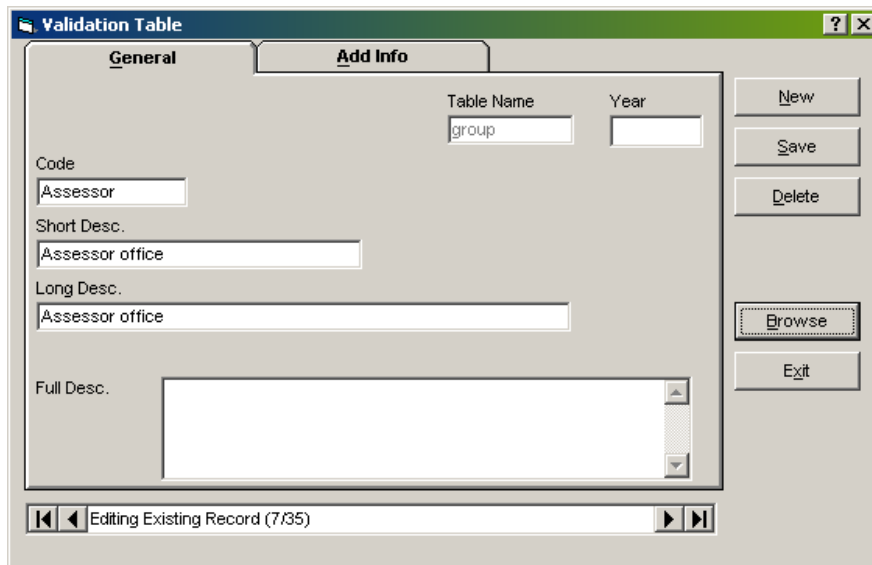
> **Note:** The Jurisdiction list box appears only if the **Support of Multiple Jurisdictions** option is selected under the *Options* tab of the *System Registry Maintenance* form. *See System Registry Maintenance on page 16.*

Creating a Group

Click the ± button to open the *Group Validation Table Header* form and create a group.

> **Note:** Individual user access rights will override group access rights.

Group Validation Table: From the *User Maintenance* function, *Group of Users* field, click the ± button to open the *Group* Validation Table and create a new group.

Table Name: This field displays the Validation Table Name *Group*.

Year: N/A

Code: Enter a code to identify the group in the database.

Short Description: Enter a short description. This is used for fast data entry and look-ups where space is limited on forms.

Long Description: Enter a long description. This is displayed for look-ups, on forms and normally used for reporting.

Full Description: N/A

Providing Access to a Jurisdiction

To provide access to a jurisdiction for a group:

1. Highlight the group in the **Group** list box.

2. Select the jurisdiction from the drop-down list in the **Jurisdiction** list box.

3. Click **Exit**.

For details on granting access to a user, s*ee User Maintenance on page 60.*

Setting Security Access Rights to a Jurisdiction

You can set specific access rights to each jurisdiction for the group. For example, you can grant *Full Access Rights* to some jurisdictions and *Inquiry Only* access to others. Previously, you could only grant or deny access. Now, you have four levels of access rights:

- **Full Access Rights**: The group can view, create, modify and delete data including the **historical data** for the specified jurisdiction.
- **Create, Modify, Delete**: The group can view, create, modify and delete data for the specified jurisdiction.
- **Create and Modify**: The group can view, create and modify data for the specified jurisdiction.
- **Inquiry Only**: The group can only view the data in the specified jurisdiction.

To grant access rights:

1. Select the group in the **Group** list box.

2. Select the jurisdiction from the Jurisdiction drop-down list.

3. Highlight the jurisdiction in the list box.

4. Click **S** to open the *Access Rights* screen.

5. Select the applicable **Access Type** from the list.

6. Click **OK**.

7. Repeat steps 3 to 6 for each jurisdiction the group can access.

To remove all access rights to a jurisdiction for the group:

1. Highlight the jurisdiction you want to remove in the **Jurisdiction** list box.

2. Click **R**.

Note: If you select a user from the **Users** drop-down list, the user is added to the selected group and removed from the group in which the user was previously a member.

You can set access rights to the jurisdiction for an individual user on the *User Maintenance* form. *See User Maintenance on page 60.*

Global Field Validation Mask

📖 Overview
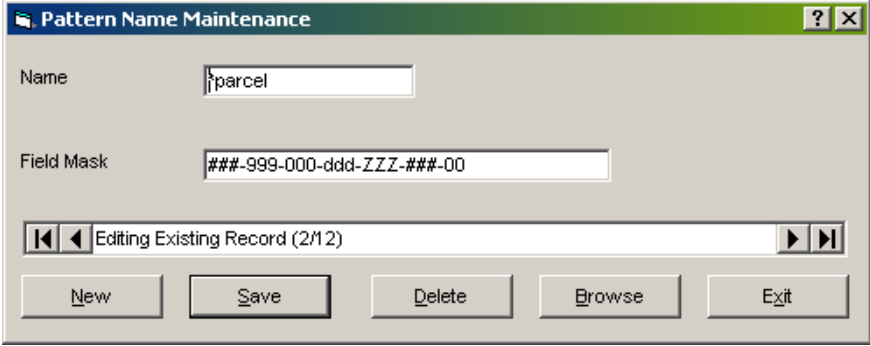
With the *Global Field Validation Mask* function, you can define a set of *Field Masks* that can then be applied to fields in Govern for Windows functions. Applying a field mask automatically formats the data entered in the field according to your pre-set pattern. For example, you can define a pattern for phone numbers and apply it to the *Telephone* fields in Govern. Then, if the user enters 18005618168, this is automatically formatted as 1-800-561-8168.

Use this function for phone numbers, postal or *ZIP* codes, Tax Map Numbers, Social Security Numbers, etc.

To apply a field mask, follow the instructions under Field Setup Mode on page 217.

To access this form, from *Govern's* main screen:

1. Select *Tools* > **System Administration (Govadm32.exe)**

2. In *Govern Admin* select *Setup* > **Global Field Validation Mask**

Creating a Field Mask: To create a new field mask, click **New**.

Saving a Field Mask: Click **Save** to save a new field mask or modifications to an existing one to the USR_FIELDS_MASK table.

Deleting a Field Mask: Click **Delete** to delete the current record.

Browsing Field Mask Records: Click **Browse** to view a list of the existing field masks.

Name: Enter a name for the field mask. This appears in the drop-down list that is displayed when you apply the mask. *See Field Setup Mode on page 217 for details.*

Field Mask: In this parameter, enter the text string that will be used for your field mask.

Note: You can enter a maximum of 64 characters in this parameter.

The following tables list the symbols that can be used in field masks. The second table lists symbols that can be used for Tax Map Numbers only:

Valid Masks for all Types of Fields

Symbol	Description
#	Numeric value. Exact number of digits must be entered as defined in the "New Database Field Creation". You can use the "-" (Dash) to separate the values.
9	Numeric value left justified compressed with trailing zeroes.
0	Numeric value right justified compressed with leading zeroes.
>	Alpha & Numeric values. Alphabetic characters must be in uppercase. If only **ONE** ">" is entered, then the number of digits entered can be LESS than defined in the "New Database Field Creation" Size. Otherwise, the exact number of characters must be entered as defined. You can use the "-" (Dash) to separate the values.
<	Alpha & Numeric values. Alpha in lowercase. If only **ONE** "<" is entered, then the number of digits entered can be LESS than defined in the "New Database Field Creation" Size. Otherwise, the exact number of characters must be entered as defined. You can use the "-" (Dash) to separate the values.

Symbol	Description
A	Alpha character in Uppercase. Number of characters entered must be as defined in "New Database Field Creation" Size. You can use the "-" (Dash) to separate the values.
^	Used to separate different possible masks in the same pattern also used as an *OR* clause. *Note that this character is not valid for Tax Maps and Lot Numbers.*
!	Alpha and numeric values as entered, both uppercase and lowercase. You can use the dash, — to separate values.
" "	Leaves a blank space before the next series of characters, in the same text box.

EXAMPLE:
A zip code can take two (2) formats, five (5) digits, or the extended "ZIP + 4" format. A pattern for these formats could be presented as:
#####^#####-####
Valid entries for this pattern would be 90210 **OR** 20037-8001. Note the use of the caret "^" for the logical *OR*.

Valid Masks for Tax Map and Lot Number Fields Only

Tax Map and Lot Numbers are special fields that are identified with the following names respectively, ***parcel** and ***lot**. These are default system reserved names that are used for searches. The field mask pattern can be modified, but the names cannot.
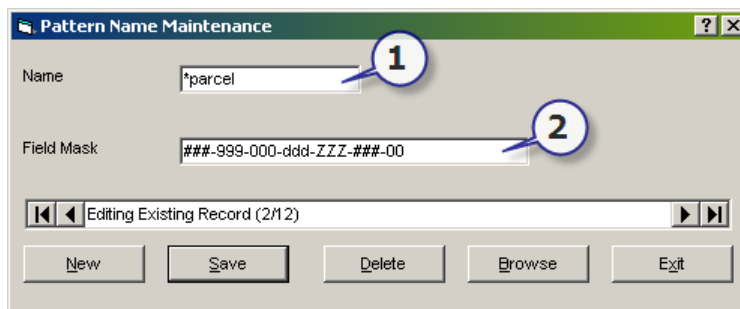
Symbol	Definition
d	Numeric value left justified compressed **without** trailing zeroes. *The "d" is not to be confused with the "9" mask used for all types of fields. The trailing zeroes are not saved within the database.*

Symbol	Definition
Z	Numeric value right justified compressed **without** leading zeroes. *The "Z" is not to be confused with the "0" mask used for all types of fields. The trailing zeroes are not saved within the database.*
.	Displays the next series of characters in another text box with the period in between. *This character is used as a separator.*
:	Displays a single "." Inside the series of characters, within the same text field. *This character is used as a separator.*
""	Displays the next series of characters in another text field. *This character is used as a separator.*
-	Displays a "-" (Dash) inside the series of characters, within the same text field. *This character is used as a separator.*

> **Note:** If you are applying the Tax Map Number type field mask to added fields, and those added fields appear on a secondary tab or divider, you will need to reposition the text boxes using the *Object Dragging Mode* feature. *See Object Dragging Mode on page 215*.

Validation Masks and the Database

To better understand how the Govern system processes *Tax Map* and *Lot Numbers*, we can look at the following example. If we look at the setup of the following field mask, we see the following in Govern Admin.

The ***parcel** mask has a pattern of...

###-999-000-ddd-ZZZ-###-00

- **###** - This indicates that exactly three (3) numeric characters must be entered
- **999** - The "9" indicates that a numeric entry must be made, up to three (3) characters. If three characters are not entered, any entry will be "padded" with leading zero's; i.e. a user entry of 7 will result in 700 being entered, or 12 will result in 120.
- **000** - The "0" indicates that a numeric entry must be made, up to three (3) characters. If three characters are not entered, the entry made will have zero's added to it or "padded" with trailing zero's. i.e. a user entry of 5 will result in 005 being entered, or 14 will result in 014.
- **ddd** - As indicated earlier, the "d" denotes that a numeric entry of a maximum of three (3) characters, must be made. If less than three (3) characters are entered, any existing entry will be "padded" with trailing zero's. What differs this character from the use of "**9**" is that when it is stored in the database, the trailing zero's are stripped out; i.e. 100 will be stored as 1, or 450 will be stored as 45.
- **ZZZ** - These characters indicate that a numeric entry of a maximum of three (3) characters must be made, if less than three (3) characters are entered, any existing entry will be "padded" with leading zero's. What differs this character from the use of "**0**" is that when it is stored in the

database, the leading zero's are stripped out; i.e. 009 will be stored as 9, or 073 will be stored as 73.
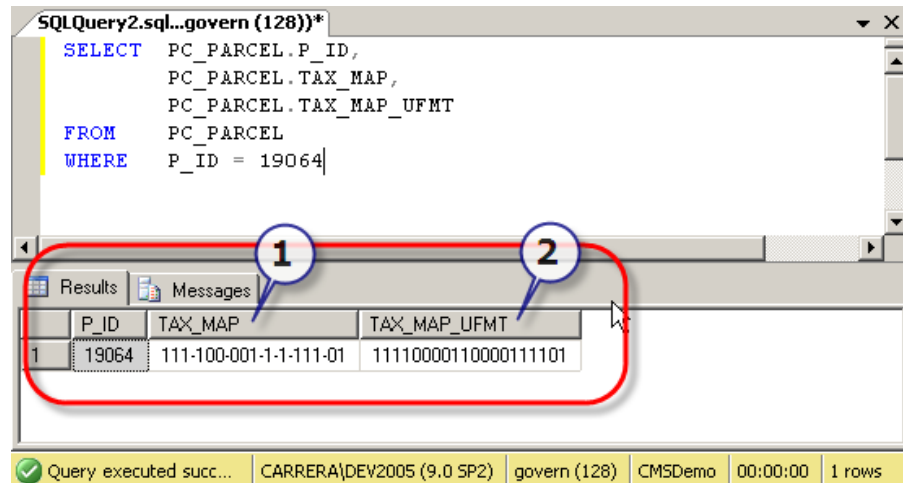
> **Note:** If look at the entry of the P_ID in the database, we see that the Tax Map is stored in two (2) columns in the database, **TAX_MAP** and **TAX_MAP_UFMT**. The **d** and **Z** mask entries are saved with the dash "**-**" separator in the TAX_MAP column, but the trailing and leading zeros are removed. In the TAX_MAP_UFMT column, the **d** and **Z** mask entries are saved with the trailing and leading zeros, but the dash "**-**" separators are not saved for the entire entered sequence.

- **###** - Exactly three (3) numeric characters must be entered; there will be no padding with leading or trailing zero's.
- **00** - A numeric entry of up to three (3) characters must be made.
- **-** - Dashes act as separators.

The shortened format for the "**d**" and the "**Z**" characters are used when indicating *Tax Map* and *Lot* numbers in, *Reports*, the *Summary Record Card* function, *Labels*, and *Formatted Tax Map* fields.

Validation Tables

📖 Overview

Maintain the *System* and *User Validation Tables* on the *Validation Tables* form. These tables are used to validate the information entered in the various fields. Create and maintain the elements of the tables on the *Validation Codes* form.

The *Property Control Validation Tables* used in the *Property Area* function, are maintained from a separate form. These tables are all saved by year and where applicable, by jurisdiction. See *Property Control Validation Tables on page 97*.

To access this form, from Govern's main screen:

1. Select *Tools* > **System Administration (Govadm32.exe)**

2. In Govern Admin select *Setup* > **Validation Table** or **Property Control Validation Table**

Validation Table Header Fields

System: Select this option to view the **System** validation tables. Deselect it for the user tables. Users with Super User or administrator rights can view, modify and create the user tables from this form and any user has been granted access rights to the *Validation Table Header* form can view existing data and create new columns. *See Menu Security Setup on page 72*.

> **Note: Govern Software Inc.** maintains the system tables. *Only the description* may be modified by the user.

Table Name: This field displays the name of the table. Use a descriptive name such as **state** for State or **strdir** for street direction. The table name can be a maximum of eight characters.

Description: This field displays a brief description or title for the table.

Forms: This field displays all the forms that are related to the current table. The list of forms is used for information purposes only and cannot be modified.

Table Type: The Table Type is system-generated and is used, as follows:

- **R**: Regular
- **A**: Accounts / Receivable
- **C**: Property Control (for multimedia and zoning information)
- **B**: Property Control (for the *Property Area* function)
- **M**: Mass Appraisal
- **P**: Permits and Inspections
- **S**: Super User
- **T**: Tax: Aircraft, Boat, Motor Vehicle, Personal Property and Real Property
- **U**: Utility Billing

If you create a table through the *Validation Table Header* form in Govern Admin, it is automatically assigned the *Regular* table type.

> **Note:** The Table Type is used for informational purposes only and cannot be modified.

Use Full Description: Select this option when you create a new table to enable the **Full Description** field on the *Validation Table Header* form. The full description can be used for reports.

Reserved User Validation Tables

The following Validation User Tables must be present and must contain the following codes

Table Name	Description	Code	Description
Areatype	Area Type	e	Effective
Brand	Meter Brand	b	Badger
		r	Rockwell
Inspter	Inspection territory	*	All
MAfrate	Municipal Adjustment Factor Rate	1	Seasonal Residence
		2	Single Family Residence
		3	Multi Unit Residence
		4	Mobile Home
		5	Travel Trailer
		6	Commercial
Messbill	Messages Bill	1	General
		2	Information Only
		3	Third Party
		4	Owner w/Mortgage
		5	TSO/Mortgage
		6	Second Half Bill
		7	Duplicate Bill
Messtat	Departmental Message Status	c	Closed

Table Name	Description	Code	Description
		f	Forwarded
		s	Scheduled
Mistype		critical	Critical
		insp	Inspection
		reminder	Reminder
Pmactaw	Permit Activity Answers	1	Yes
		2	No
		3	Special 1
		4	Special 2
Pmfeld_A	Customized Fields	Same as Pmfield	
Pmfeld_AL	Customized Fields	Same as Pmfield	
Pmfeld_B	Customized Fields	Same as Pmfield	
Pmfeld_BL	Customized Fields	Same as Pmfield	
Pmfeld_BN	Customized Fields	Same as Pmfield	
Pmfeld_CO	Customized Fields	Same as Pmfield	
Pmfeld_D	Customized Fields	Same as Pmfield	
Pmfeld_E	Customized Fields	Same as Pmfield	
Pmfeld_G	Customized Fields	Same as Pmfield	
Pmfeld_L	Customized Fields	Same as Pmfield	
Pmfeld_OF	Customized Fields	Same as Pmfield	
Pmfeld_P	Customized Fields	Same as Pmfield	
Pmfeld_PA	Customized Fields	Same as Pmfield	
Pmfeld_PN	Customized Fields	Same as Pmfield	
Pmfield	Customized Fields	basement_size	Basement Size
		estimated_cost	Estimated Cost
		first_floor	First Floor
		last_fee	Last Fee

Table Name	Description	Code	Description
		last_fee_date	Last Fee Date
		mezzanine_size	Mezzanine Size
		nb_of_items	Number of Items
		second_floor	Second Floor
		total_dimension	Total dimension
		total_fee	Total Fee
		User_amount	User Defined Amount
Pmname	Name Types	appl	Applicant
		contact	Primary Contact
		owner	Owner
		Insp	Primary Inspector
PMINTYST	Inspection Types	Failed	Failed Inspection
		Incomplete	Incomplete Inspection
		Passed	Successful Inspection
Proptype	Property Type	0	Mixed Use
		1	Residential
		2	Open Space
		3	Commercial
		4	Industrial
		8	Mineral
		9	Exempt
Qual	Sale Qualification	n	Not qualified
		q	Qualified
		u	Unverified sale
Timecost	Time Cost	cont	Contributions
		time	Time Cost Recovery
Cctype		rf [*]	Refund

Table Name	Description	Code	Description
		rev[*]	Reversal

> **Note:** You can change the description but not the codes for these tables.

> **Note:** The codes **rf** & **rev** are not defined in the CCTYPE table but are used internally by Govern. They are unavailable to the user.

> **Note:** Multiple Property Type Codes can be defined with the initial digits, 0-4 and 9. For example, 01, 02 and 03 are mixed-use tables.

New Reserved User Validation Tables

The following table names are system reserved, but there are no reserved code names for them, i.e. the user is free to create names that conform to the restrictions of the parameter.

Table Name	Description	Codes
pmdivision	Division Code	User definable
pmcond	Condition Code	User definable
pmcondca	Category Code	User definable
pmcondst	Condition Status	User definable
pmcondty	Condition Type	User definable
pmevent	Event Code	User definable
pmeventc	Category Code	User definable
pmeventd	Disposition Code	User definable

Validation Table Header Command Buttons

Viewing Validation Tables: Each validation table is saved as a separate record. Select the **System** option to view the system tables or deselect it to view the user tables. Then, use the right / left navigation arrows to scroll to a

record or click **Browse** to view a list of the existing validation tables. The table name, table description and table type are displayed in the list.

Creating a New Validation Table: Click **New** to clear the form and create a new validation table.

Exit / Cancel: When you click **New** the **Exit** button changes to **Cancel** so that you can clear unsaved data without closing the form. If there is any unsaved data, a confirmation message appears when you click **Cancel**. Click **Yes** to continue or **No** to clear the new data and return to the previous screen. Similarly, when you click Exit, a confirmation message if there is any unsaved data. Click **Yes** to continue, **No** to clear the new data and close the form or **Cancel** to close the confirmation message and leave the screen unchanged.

Saving a New Validation Table: Click **Save** to save a new validation table or any modifications to an existing one.

> **Note:** Do not change the validation codes if the table type is different from **Regular**. Make the modifications through the module used to create the table, as indicated by the Table Type.

Deleting Validation Tables: Click **Delete** to delete the current validation table.

> **Note:** Only the *Regular* Table Types may be deleted from the system, if the User has this privilege. The system tables may be deleted or modified ONLY by a User with *Super User* privileges.
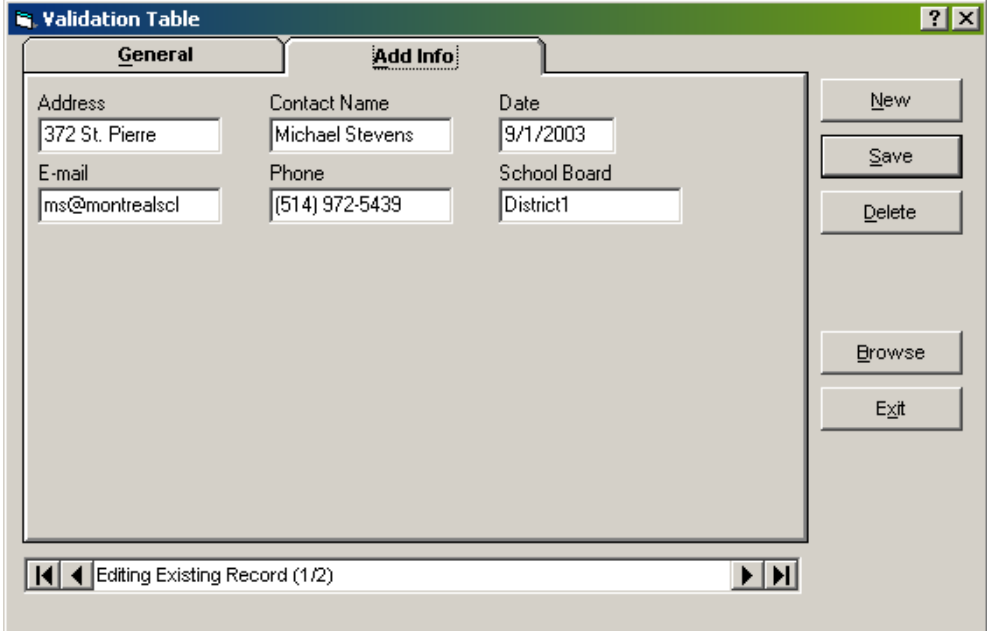
Creating Codes for the Current Validation Table: Click **Codes** to open the *Validation Table* screen and create new codes for the current validation table. *See Validation Codes on page 92*.

Adding Columns: Select **Add Columns** to open the *New Database Field Creation* form and create new columns or fields for the selected validation table. These can be used for maintaining data related to the validated list, such as, neighborhood characteristics, rate data, or contact information for an organization.

Formulas or logical expressions are linked to a column type. *See New Database Field Creation on page 251 for more information*.

The new field is added to the **Additional Information** tab. It cannot be modified or deleted from this form.

Since Microsoft® Office Access imposes a limit of 256 columns per table and six are used by the form, you can add to 250 additional columns or fields.

Note: You cannot delete or modify the new columns once they are created.
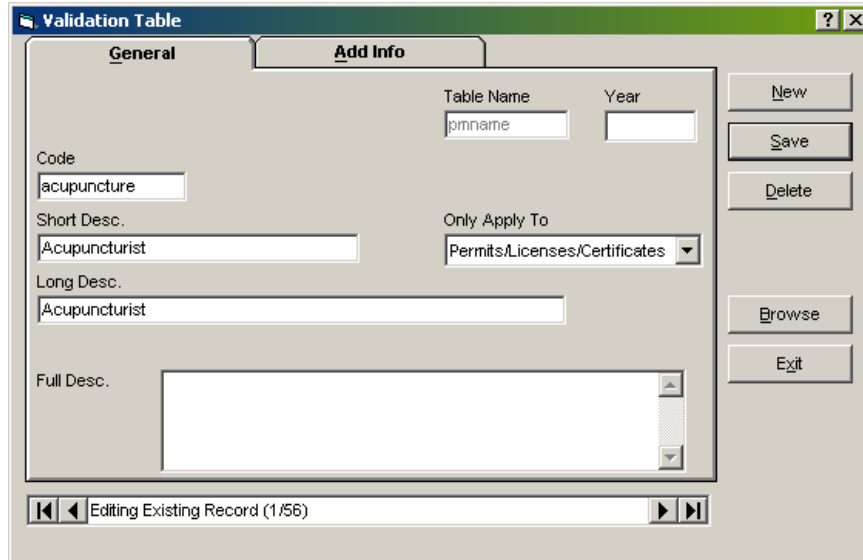
Note: Any user who has been given access to the *Validation Table Header* form can create new columns and view existing data for the user validation tables. However, only a Super User or Administrator can create, delete or modify the user validation tables.

Validation Codes

The *Validation Table Codes* form is used for creating and updating the elements and values in each table. This form is used for both *System* and *User Validation Tables*.

To access this form, from Govern's main screen:

1. Select *Tools* > **System Administration (Govadm32.exe)**

2. In Govern Admin select *Setup* > *Validation Table* > **Codes**

Validation Table Code Command Buttons

Creating a Code: You can create a new code by clicking the **New** button.

Saving a Code: Clicking the **Save** button allows you to save a new code, or any modifications to an existing one.

Deleting a Code: Clicking the **Delete** button allows you to delete the current code from the table name displayed.

Browsing Code Records: Clicking the **Browse** button allows you to browse all codes for the current table.

Validation Table Code Parameters

Department: This field is visible for *Land Management* and *Property Control* codes only. It displays the department where the codes were created.

Table Name: This field displays the table name.

Year: This field is enabled for Mass Appraisal and Tax Assessment tables only. It displays the year in which the codes were created.

Code: This field displays the table code.

Short Description: Enter a short description to identify the department. This is useful for fast data entry and look-ups if space is limited on the forms.

Only Apply To: Select one of the listed options to filter the name type code according to the selected permit type. This parameter is available when the **PMNAMES** validation table in *Land Management* is selected. *See Permit Type Validation on page 94 for details.*

Long Description: Enter a long description to identify the department. This will be displayed for look-ups on forms and will be normally used for reporting.

Full Description: You can add a full description to all new tables and have them displayed on reports. Note, for the existing tables, you can enter a full description on only the OFFENSE and FIREPREV (fire prevention) tables. These descriptions are displayed on the *Offense* function when a user double-clicks on the *Violation/Offense* or *Fire Prevention Description* fields.

> **Note:** To use the Full Description field when you are reporting with other tables, create a field called FULL_DESC as a memo type in the desired table.

Do Not Show this Code: This option is displayed for *System Validation Codes* only. Select to hide the selected code so that it cannot be used for data entry. For example, if you have two setups, you can enable this code in one setup and disable it in another.

Permit Type Validation

In the *Validation Table* form, it is possible to configure the system to apply a name type validation. This validation or filter is based upon the permit type that is being created. By default, in *Govern for Windows* when linking a name type, regardless of what permit type is being selected the system displays all name types. This applies to linking a name to a *Complaint/Greivance/Request For Service/Workflow*, *Offence/Violation*, or *Permit/License/Certificate* permit type in *Govern.NET*. When there are many name types in the list, the searching process for the name type can be tedious. When the validation filter is used, only the name types that apply to the permit type is displayed.

Permit Types that can be filtered are as follows:

- Complaints/Workflows/Grievance/Request for Services
- Offences/Violations

- Permits/Licenses/Certificates
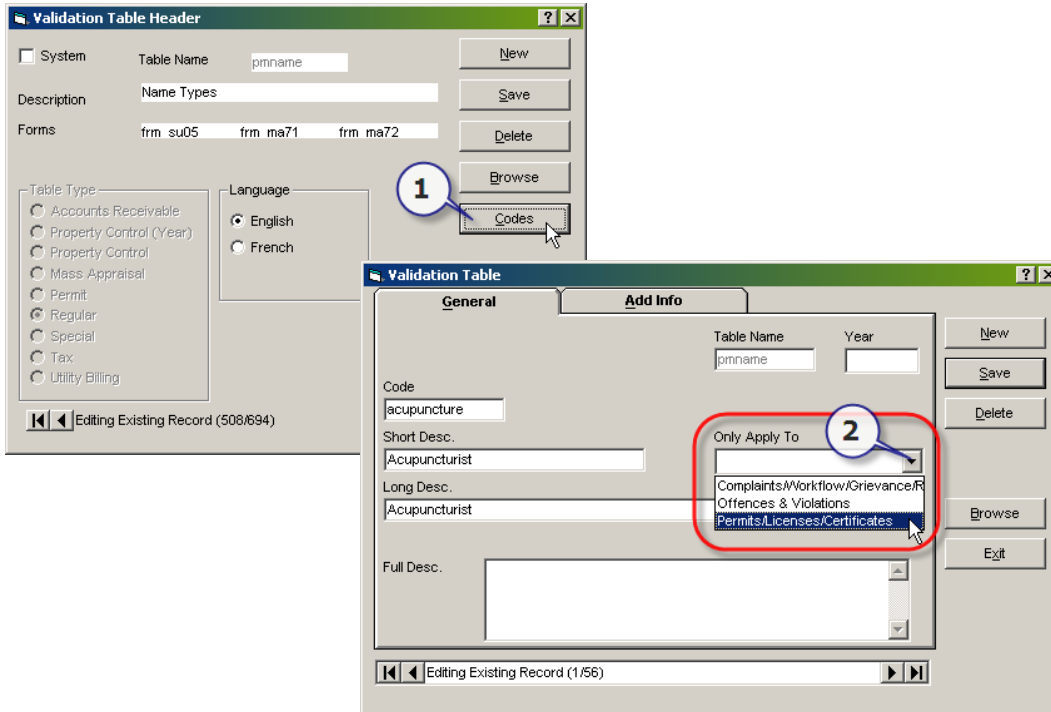
To apply a filter to a name type, in Govern Admin...

1. Select *Setup* > **Validation Table...**
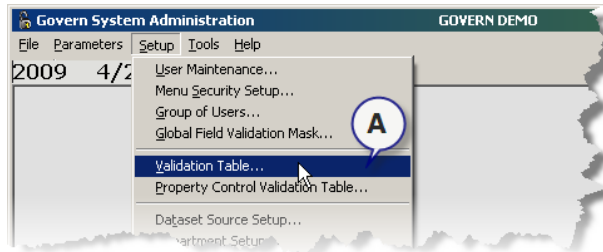
2. In the *Validation Table Header* form, click **Browse**; look for the table called **PMNAME**, double click to select it.

3. Back in the *Validation Table Header* form, click **Codes**, to display the *Validation Table* form.

4. In the *Validation Table* form, select the code that you would like to apply the filter to.

5. Look for the **Only Apply To** parameter and click the drop-down menu to select the required filter.

6. Click **Save** to save the modification.

Now, when making a link to a permit type that matches the filter in Govern for Windows, only filtered name types appear in the list. For example, if you had selected the *Permits/Licenses/Certificates* option for a name type, it will only be display when creating a a Permit, License, or Certificate. The name type will not be present at any other time.

Note: When no *Permit Type* filter is applied in *Govern Admin*, the name type will always be displayed for all *Permit Types*.

Property Control Validation Tables

📖 Overview

Use the Property Control Validation Tables form to maintain the tables that are linked to the *Property Area* function in Govern. These tables are saved by year and by jurisdiction, if applicable.

Table Name	Description
VT_USR_AREAID	Area Identification
VT_USR_CITYDS	City District
VT_USR_FIREDS	Fire District
VT_USR_FLDZONE	Flood Zone
VT_USR_NEIGHBOR	Neighborhood Code
VT_USR_NEIGHSUB	Sub-neighborhood Code
VT_USR_PARKDS	Park District
VT_USR_POLLING	Polling
VT_USR_PRECINCT	Precinct
VT_USR_SDIST	School District
VT_USR_SPECDS	Special District
VT_USR_WARD	Ward
VT_USR_ZONING	Zoning Codes

These tables are linked to the *Property Area* function in Govern. They are saved by year and by jurisdiction, if your setup includes *Support of Multiple Jurisdictions. See System Registry Maintenance on page 16 for more information.*

FINAL DRAFT

Dataset Source Setup
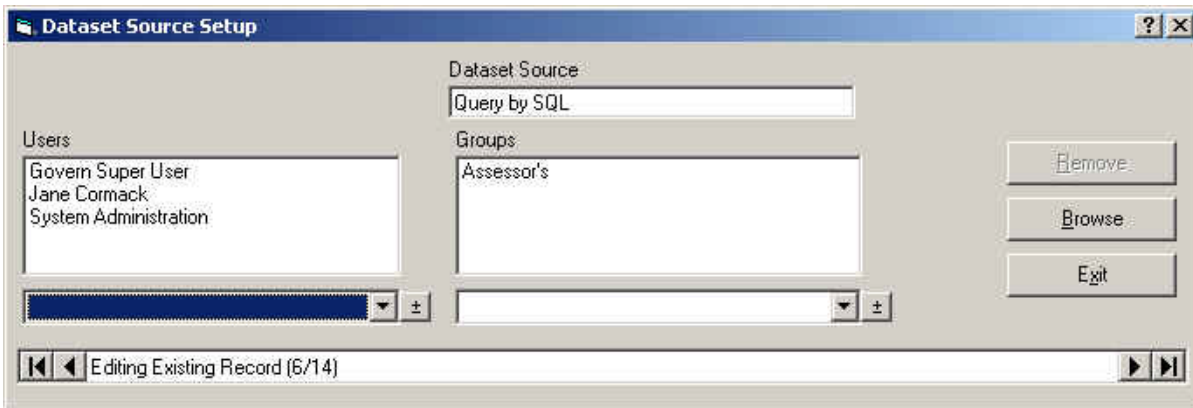
📖 Overview

Grant and restrict user access to the *Dataset Sources* or search screens on the *Dataset Source Setup* form. Permissions can be granted by user or by group. A default *Dataset Source* is assigned to the department on the *Department Setup* form. By default, this is highlighted on the **Open** menu in Govern or launched from the **Quick Open** button. 📁

To access this form, from Govern's main screen:

1. Select *Tools* > **System Administration (Govadm32.exe)**

2. In Govern Admin select *Setup* > **Dataset Source Setup**

About Dataset Source Screens

Govern provides the following *Dataset Source* or search screens for retrieving records. This list provides some of the search options for each screen. *For complete details, refer to the Property Control guide*:

- **General**
    - **External System**: by property control, name and address or permit, from an external source, loaded to PC_ EXTERNAL, NA_EXTERNAL or PM_EXTERNAL. PC_EXTERNAL can also be loaded from Govern.
    - **None**: to reset the form

- **Property Control**: by parcel ID, Tax Map Number, subdivision, lot, project, linked parcels or effective year
- **Name & Address**: by account number, Federal ID Number, Social Security Number, drivers license or date of birth
- **Query by SQL**: by SQL query. Queries can be stored or composed and executed from this screen. *See SQL Queries on page 211 for details on the setup of this screen.*

- **Function**
  - **Utility Billing**: by account number, utility billing ID, meter serial number, route number, cycle code, name or address
  - **Personal Property**: by account number, personal property ID or business address
  - **Public Hearing**: by application number, status, title or date
  - **GIS**: by tax map number, subdivision, split / merge or virtual parcel
  - **Offenses**: by offense number, date, type or name
  - **Workflow**: by reference number, date, type or date
  - **Inspections**: by inspection number, date, type, inspector's name, status or result
  - **Permit / License / Certificate by Property**: by permit, license, certificate or application number, tax map number or address
  - **Permit / License by Name**: by permit, license or application number, date, type or name

To access these screens:

1. In Govern, select **File** > **Open**.
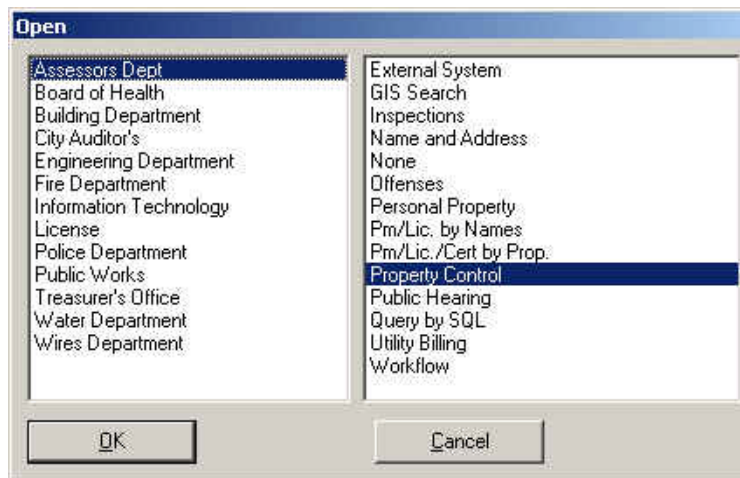
2. By default, your primary department and default *Dataset Source* are highlighted. You can select alternate options, if required.

3. Click **OK**.

Dataset Source Command Buttons

Viewing Dataset Source Records: Each *Dataset Source* is saved as a separate record. Use the right ▶▶| / left |◀◀ navigational arrows to view individual records or click **Browse** to view a list of the records, by query name and definition.

Removing User / Group Access to the Dataset: Select the user or group from the list box and click **Remove**.

Exit: Click **Exit** to your modifications and to close the form.

Dataset Source Parameters

Dataset Source: This field displays the *Dataset Source* for the current record.

Users: This list box displays the users with access permission to the current record.

Selecting Users: Select the users from the drop-down list or click ± to open the *User Maintenance Setup* screen and create a new user. See *User Maintenance on page 60*.

Groups: This list box displays the groups with access permission to the current record.

Selecting Groups: Select the groups from the drop-down list or click ± to open the *Group* validation table and create a new group. *See Group Validation Table on page 75*.

> **Note:** User access rights override group access rights.

Department Setup
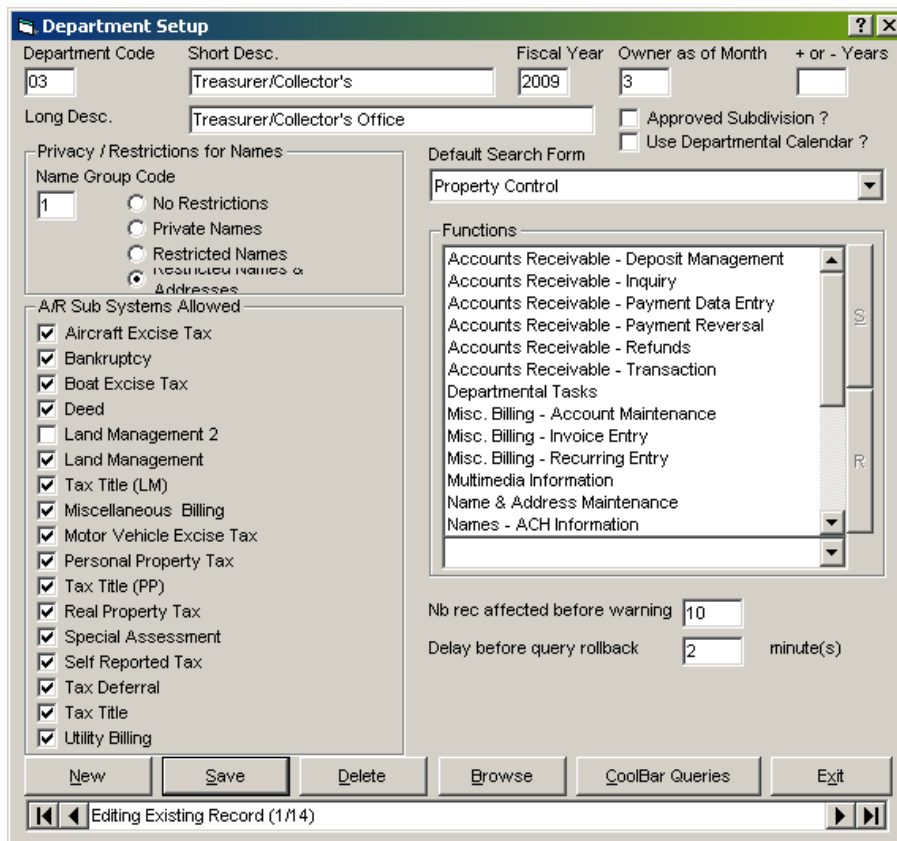
📖 Overview

Define the profile for each department on the *Department Setup* form. This includes the fiscal year used by the department, access to the Govern data entry functions and access to Accounts / Receivable data.

To access this form, from Govern's main screen:

1. Select *Tools* > **System Administration (Govadm32.exe)**

2. In *Govern Admin* select *Setup* > **Department Setup.**

Department Setup Parameters

Department Code: Identify the department by a code. All links to this department will use this code. All alphanumeric characters are valid.

Short Desc. Enter a short description to identify the department. This is used for fast data entry and look-ups if space is limited on forms.

Long Desc. Enter a long description to identify the department. This is used for look-ups, on forms and typically on reports.

Fiscal Year: Specify the fiscal year that the department is working in.

Note: This field must be modified manually when the department changes to a new fiscal year.

This year is displayed on the toolbar of the *Govern Admin*, *Govern* and *Govern Batch Processing* applications.
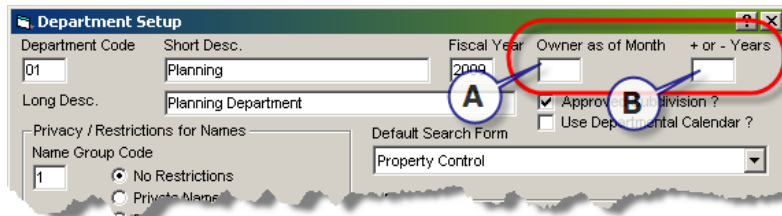
To change the year:

1. Click on the **Year** field on the toolbar.

2. Enter the new year in the text box.
3. Click **OK**.

Owner as of Month / Plus (+) or Minus (-) Years

The *Owner as of Month* feature allows you to specify the month that the system will register new owners.

For example, the assessors office might use the date of *March 1* as their annual registration date. This means that if a sale of a parcel occurs after *March 1* plus a day, i.e. *March 2, 3 etc.*, the previous owner is still considered as the *Owner* because they were in possession as of *March 1*.

Owner as of Month: Specify the (as of) month to be used when creating new property owners.

> **Note:** You can leave the **Owner as of Month** field blank to consider the current owner immediately on possession.
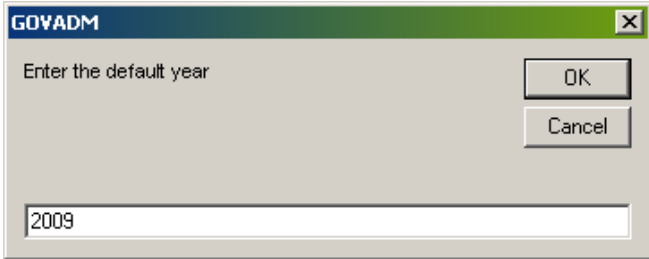
+ or – Years: Specify the number of years added, or subtracted, from the fiscal year, relative to the last assessment.

For example, if the last assessment was performed in the year 2007, and the current year is 2009, we would enter –2, i.e. (2007-2009 = -2), in the **+ or - Years** parameter.

Approved Subdivision: If checked, this department will only work with approved subdivisions.

Use Departmental Calendar: The *Departmental Calendar* is used only for scheduling and maintaining inspections, within the department. Inspection calendars can also be set up at the organizational level or for individual inspectors. *Refer to the Permits & Inspections guide for further details.*

> **Tip:** You can use the *Holiday Calendar* to define statutory holidays, for billing purposes. *Refer to the Accounts / Receivable guide for details.*

Default Search Form: Select the default *Dataset Source* or search screen, for the department, from the drop-down list. By default, this Dataset Source is highlighted on the **Open** menu in Govern or launched from the **Quick Open** button.

For example, in the following screen shot, the Assessors Department is assigned the *Property Control Dataset Source*. Search options from this screen include: parcel ID, tax map number, subdivision, lot, project and linked parcels. *For more information on Dataset Source screens, see Dataset Source Setup on page 98.*
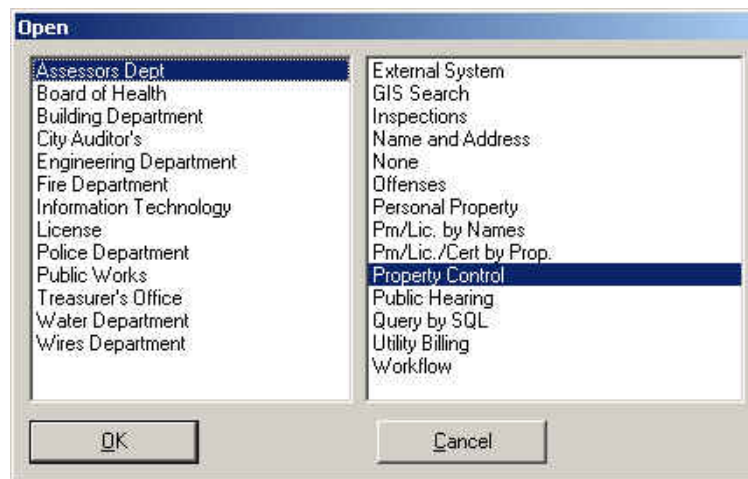
Nb records affected before warning : When an action query is initiated, the system will first perform a record count to determine the number of records that will be affected by the query. Enter the minimum number of records that need to be affected, before a warning is displayed to the user.

Delay before query rollback (minutes): Enter the number of minutes for the delay before the rollback occurs. Once this amount of time has elapsed, the rollback will occur automatically

If an *action query* is used; for example, to add, update or delete records in the database, when you perform this action, within the department, a warning screen appears

For example, the following warning screen is displayed if the P_ID is less than 10,000.
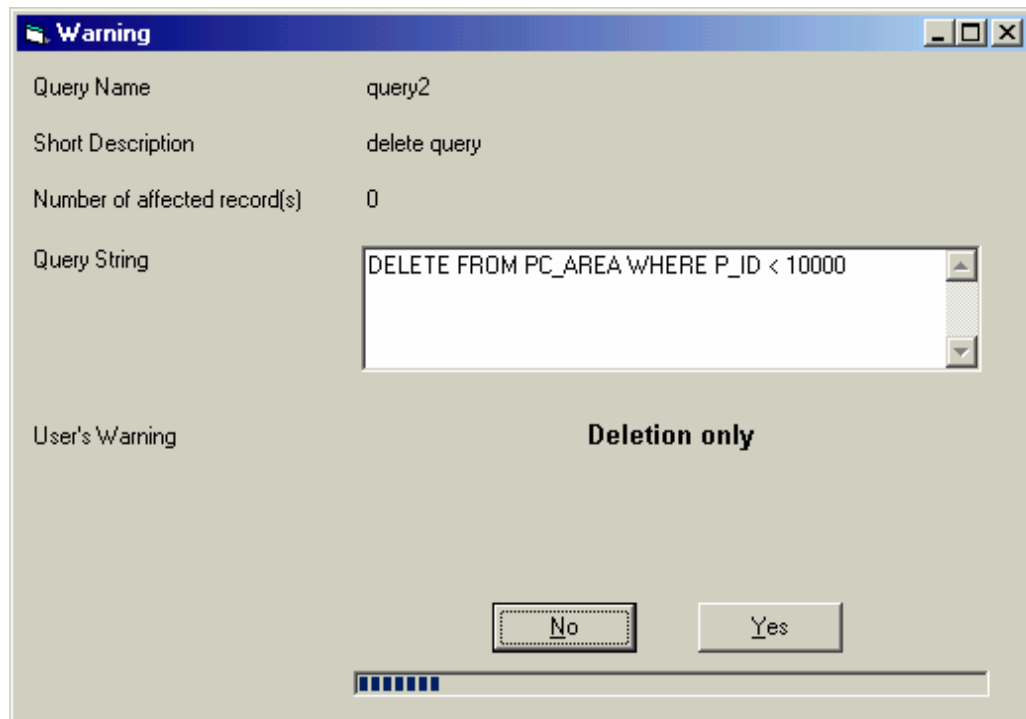
No: Click **No** to stop the deletion process and the roll back from occurring.

Yes: Click **Yes** to allow the deletion process to continue.

Privacy / Restrictions for Names group

To set up access rights, for name and address records, you need to define the following:

1. Assign a *Name Sharing Group* to the Department, as described below under *Name Sharing Group on page 106*.

2. Provide access to the *Name and Address Maintenance* function to the applicable departments.

3. Select the **Allow Creation of Names** option on the *User Maintenance* form for users who need to create names and deselect it for all others.

4. Set the *Access Type Permissions* to the *Name and Address Maintenance* for all users, as described under *Name & Address Maintenance Security on page 109*.

5. Set permissions to the batch processes affecting name records, including the Format Names and Address, Export and Import Names in Mail 4+ Format and especially the Name Merge Utility, as described under *Assigning User Permissions to Batch Processes on page 292*.

For details on all restrictions and accesses, refer to the *Restriction Level: Private Names on page 111*

Name Sharing Group

Name Group Code: You can create a *Name Sharing Group* in order to extend access rights to the name and address records, created by your department, to one or more of the other departments, within your organization.

To create a *Name Sharing Group*, enter a code of one or two characters in this field. Then, enter the same code when you set up the other departments in this group.

Next, select one of the following options to define the access rights for the departments included in the *Name Sharing Group* and for those outside of it.

The code of the *Name Sharing Group* and the type of security permissions are displayed on the *Name and Address Maintenance* function in Govern, unless the records are private to another department. If the name is restricted, it is grayed out and cannot be modified. Similarly, if the address is restricted, it is also grayed out and cannot be modified.

There are four levels of security for name and address records.

- **Private Names** - *Name and Address* records, are private to the department or *Name Sharing Group*, where they were created. Other users can't search, modify, or delete these names. They can only view them if they are already link to other *Govern* functions
- **Restricted Names -** 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 can't modify or delete them. They are still able to search for the records and modify the addresses.
- **Restricted Names and Addresses** - 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. Other users can perform a search for these records but cannot modify or delete them.

- **No Restrictions** - There are no restrictions to the Name and Address portions of the records, they can be searched, modified, or deleted. Other users are equally unrestricted.

Refer to the Property Control guide for more information on this function.

Name & Address Security Grid

The two (2) grids below should serve as a guide to the users level of access when they are *Within a Department* in a group, or *Outside of the Name Group*. For example in the *Name & Address* form, a user that is in the *Building Department* , and is a member of the *Create/Modify/Delete* group, within their department, for *Names* that are designated as **Private**, will be able to *Search* for the name*, Link* to the name, *Modify Addresses,* and *Delete Names*. Although note that

according to the system rule, this user is not able to *Modify* (**A**) the name. Outside of their name group they have no access (**B**). *Refer to the grids below for details.*

The following grid should serve as a guide to system imposed user restrictions for *Name Sharing* groups.

Department in the Same Group	**Private**					**Restricted**					**Restricted**					**No**				
	Search	Link	Modify Name	Modify Address	Delete Name	Search	Link	Modify Name	Modify Address	Delete Name	Search	Link	Modify Name	Modify Address	Delete Name	Search	Link	Modify Name	Modify Address	Delete Name
Full Access	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
Create / Modify / Delete	🟢	🟢	🔴	🟢	🟢	🟢	🟢	🔴	🟢	🟢	🟢	🟢	🔴	🟢	🟢	🟢	🟢	🔴	🟢	🟢
Create / Modify	🟢	🟢	🔴	🟢	🔴	🟢	🟢	🔴	🟢	🔴	🟢	🟢	🔴	🟢	🔴	🟢	🟢	🔴	🟢	🔴
Inquiry	🟢	🔴	🔴	🔴	🔴	🟢	🔴	🔴	🔴	🔴	🟢	🔴	🔴	🔴	🔴	🟢	🔴	🔴	🔴	🔴

🟢 **Allowed**　　🔴 **Not Allowed**

Outside the Name Group	Private					Restricted					Restricted					No				
	Search	Link	Modify Name	Modify Address	Delete Name	Search	Link	Modify Name	Modify Address	Delete Name	Search	Link	Modify Name	Modify Address	Delete Name	Search	Link	Modify Name	Modify Address	Delete Name
Full Access	Not Allowed	Not Allowed	Not Allowed	Not Allowed	Not Allowed	Allowed	Allowed	Not Allowed	Not Allowed	Allowed	Allowed	Allowed	Not Allowed	Allowed	Allowed	Allowed	Allowed	Allowed	Allowed	Allowed
Create / Modify / Delete	Not Allowed	Not Allowed	Not Allowed	Not Allowed	Not Allowed	Allowed	Allowed	Not Allowed	Not Allowed	Allowed	Allowed	Allowed	Not Allowed	Allowed	Allowed	Allowed	Allowed	Not Allowed	Allowed	Allowed
Create / Modify	Not Allowed	Not Allowed	Not Allowed	Not Allowed	Not Allowed	Allowed	Allowed	Not Allowed	Not Allowed	Not Allowed	Allowed	Allowed	Not Allowed	Allowed	Not Allowed	Allowed	Allowed	Not Allowed	Allowed	Not Allowed
Inquiry	Not Allowed	Not Allowed	Not Allowed	Not Allowed	Not Allowed	Allowed	Not Allowed	Not Allowed	Not Allowed	Not Allowed	Allowed	Not Allowed	Not Allowed	Not Allowed	Not Allowed	Allowed	Not Allowed	Not Allowed	Not Allowed	Not Allowed

■ Allowed   ■ Not Allowed

Name & Address Maintenance Security

In addition to creating a *Name Sharing Group*, you can further refine name and address maintenance by setting access permissions for each user.

Security for the *Name & Address Maintenance* function is more complex than for the other functions due to the important and sensitive nature of the data. *For details on defining user access on the other functions, see Functions Setup on page 123. Also, see Super User and Full Access Rights on page 66.*

There are four levels of user access that can be set for each Govern function that typically provide the following rights:

- **Inquiry Only**: The user is only able to view the data for the specified function.
- **Create and Modify**: The user can view, create and modify data for the specified function.
- **Create, Modify, Delete**: The user can view, create, modify and delete data for the specified function.

- **Full Access Rights**: The user can view, create, modify and delete data and could also modify and delete **historical data** for the specified function.

> **Note:** Super Users are automatically given Full Access Rights to all functions.

However, in order to grant the permission to create names to any user, including a *Super User* or a user with *Full Access Rights* to the *Name & Address Maintenance* function, the **Allow Creation of Names** option must be selected on the *User Maintenance* form in Govern Admin. *See User Maintenance on page 60 for more information*.

Allow Creation of
☐ Parcels   ☑ Names   ☐ Flags

The following tables display the different levels of access security for the *Name & Address Maintenance* function, according to the following tasks:

- **Search**: the right to search for a name and address record through the various search screens; for example the *Name Search* or the *Name & Address Search*. *Refer to the Property Control guide for further details*.
- **Link**: the right to link a name and address record to another function; for example, a *Permit* function, the *Owner Information*, *Occupant / Business*, *Related Lien Names*, *ACH Information by Name* or the *Real Estate* or *Utility Billing Mailing Index*, provided the user has access rights to these functions.
- **Create**: the right to create a new name and address record.
- **Modify Name**: the right to change name data: i.e., first name, last name, company name or formatted line_1.
- **Modify Address**: the right to change the address part of the record.
- **Delete Name and Address**: the right to delete name and address records.

The following conventions are used in these tables:

Symbol	Definition
✓	The user has permission to perform the task.
✘	The user does not have permission to perform the task.

Restriction Level: Private Names

Permission Levels		Ability to Perform Name & Address Maintenance Tasks					
Access Type	**Name Sharing Group**	**Search**	**Link**	**Create**	**Modify**		**Delete**
					Name	**Address**	
Super User or Full Access Rights	Member	✓	✓	*	✓	✓	✓
	Non-Member	✗	✗		✗	✗	✗
Create, Modify and Delete	Member	✓	✓		✗	✓	✓
	Non-Member	✗	✗		✗	✗	✗
Create, Modify	Member	✓	✓		✗	✓	✗
	Non-Member	✗	✗		✗	✗	✗
Inquiry Only	Member	✓	✗		✗	✗	✗
	Non-Member	✗	✗		✗	✗	✗

* The permission to create names is granted if the **Allow Creation of Names** option is selected on the *User Maintenance* form, in Govern Admin. Users can then create names within their primary department and within the *Name Sharing Group*, selected for the department. Otherwise, users do not have permission to create names, regardless of their department, regardless of the *Name Sharing Group* in which the department is a member and regardless of *User Access Type*.

Restriction Level: Restricted Names & Addresses

Permission Levels		Ability to Perform Name & Address Maintenance Tasks					
Access Type	**Name Sharing Group**	**Search**	**Link**	**Create**	**Modify**		**Delete**
					Name	**Address**	
Super User or Full Access Rights	Member	✓	✓	*	✓	✓	✓
	Non-Member	✓	✓		✗	✗	✓

Super User

Permission Levels		Ability to Perform Name & Address Maintenance Tasks					
Access Type	Name Sharing Group	Search	Link	Create	Modify		Delete
					Name	Address	
Create, Modify and Delete	Member	✓	✓		✗	✓	✓
	Non-Member	✓	✓		✗	✗	✓
Create, Modify	Member	✓	✓		✗	✓	✗
	Non-Member	✓	✓		✗	✗	✗
Inquiry Only	Member	✓	✗		✗	✗	✗
	Non-Member	✓	✗		✗	✗	✗

Restriction Level: Restricted Names

Permission Levels		Ability to Perform Name & Address Maintenance Tasks					
Access Type	Name Sharing Group	Search	Link	Create	Modify		Delete
					Name	Address	
Super User or Full Access Rights	Member	✓	✓	*	✓	✓	✓
	Non-Member	✓	✓		✗	✓	✓
Create, Modify and Delete	Member	✓	✓		✗	✓	✓
	Non-Member	✓	✓		✗	✓	✓
Create, Modify	Member	✓	✓		✗	✓	✗
	Non-Member	✓	✓		✗	✓	✗
Inquiry Only	Member	✓	✗		✗	✗	✗
	Non-Member	✓	✗		✗	✗	✗

FINAL DRAFT

Restriction Level: No Restrictions

Permission Levels		Ability to Perform Name & Address Maintenance Tasks					
Access Type	**Name Sharing Group**	**Search**	**Link**	**Create**	**Modify**		**Delete**
					Name	**Address**	
Super User or Full Access Rights	Member	✓	✓	*	✓	✓	✓
	Non-Member	✓	✓		✓	✓	✓
Create, Modify and Delete	Member	✓	✓		✗	✓	✓
	Non-Member	✓	✓		✗	✓	✓
Create, Modify	Member	✓	✓		✗	✓	✗
	Non-Member	✓	✓		✗	✓	✗
Inquiry Only	Member	✓	✗		✗	✗	✗
	Non-Member	✓	✗		✗	✗	✗

Summary

1. Only users with *Full Access Rights* on the *Name and Address Maintenance* function can modify a name even within their *Name Sharing Group*.

2. Even with *Full Access Rights*, users can modify a name, outside of their *Name Sharing Group*, only if the **No Restrictions** option is selected on the *Department Setup* form.

3. Users with *Full Access Rights*, *Create, Modify, Delete* or *Create, Modify* rights can always modify an address within their name sharing group.

4. These users can modify an address created outside their *Name Sharing Group* only if the **Restricted Name** or **No Restrictions** option is selected on the *Department Setup* form.

5. Users with *Full Access* or *Create, Modify, Delete* rights can delete name and address records even though they may not be granted permission to create or modify them.

6. All users can view and search for a name and address records unless **Private** names is set for the department and the department is outside their *Name Sharing Group*.

7. Users can create names if the **Allow Creation of Names** option is selected on the *User Maintenance* form, regardless of whether or not the user's department is a member of the *Name Sharing Group* and regardless of the user 's *Access Type*.

   If this option is selected users can create names within their primary department and within the *Name Sharing Group*, selected for the department.

Access to Accounts / Receivable Information

A/R Sub Systems Allowed: The department has access to the Accounts Receivable (A/R) data of each selected subsystem. Users can view, update and process these data through the Accounts / Receivable functions, including *A/R Inquiry*, *Payment Data Entry* and *Cash Collection Posting*.

Access to the Govern Functions

Functions group

In *Govern*, users will access functions by first logging into a department. Only the functions that are selected for the department, on this form, will be accessible to those users.

## Adding a Function to the Accessible Functions List

To add a function to the *Accessible Functions* list ...

1. Select a department.

2. Click the drop down menu below the *Accessible Functions* list for the department

3. Select the desired function.

Removing a Function from the Accessible Functions List

To remove a function from the *Acessible Functions* list

1. Click to select the function to be removed from the *Accessible Functions* list; multiple selections may be made by selecting *Ctrl + Click*.

2. Click **R**.
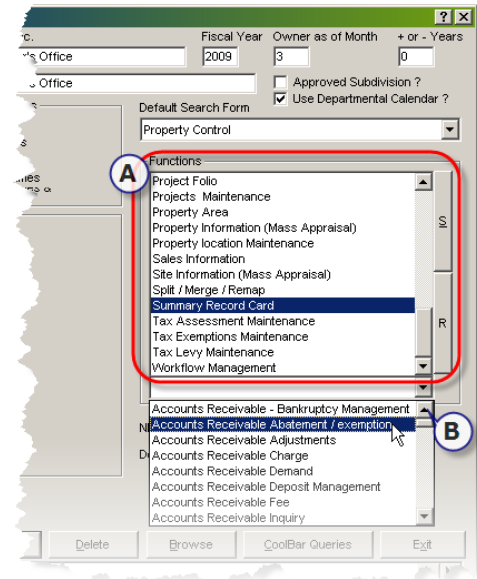
Function Security

When you select a single function, or perform an extended selection, i.e. select multiple functions at once, you are granting specific access rights to the selected functions for users and groups within the department.

WARNING: When modifications are made to user and group access rights for a department and function in the **Department Setup** form, all previously defined rights are deleted and replaced with the newly defined rights.

Note: Before setting up the Security for each function, you need to create all the users. *See User Maintenance on page 60*.

Single Function selection
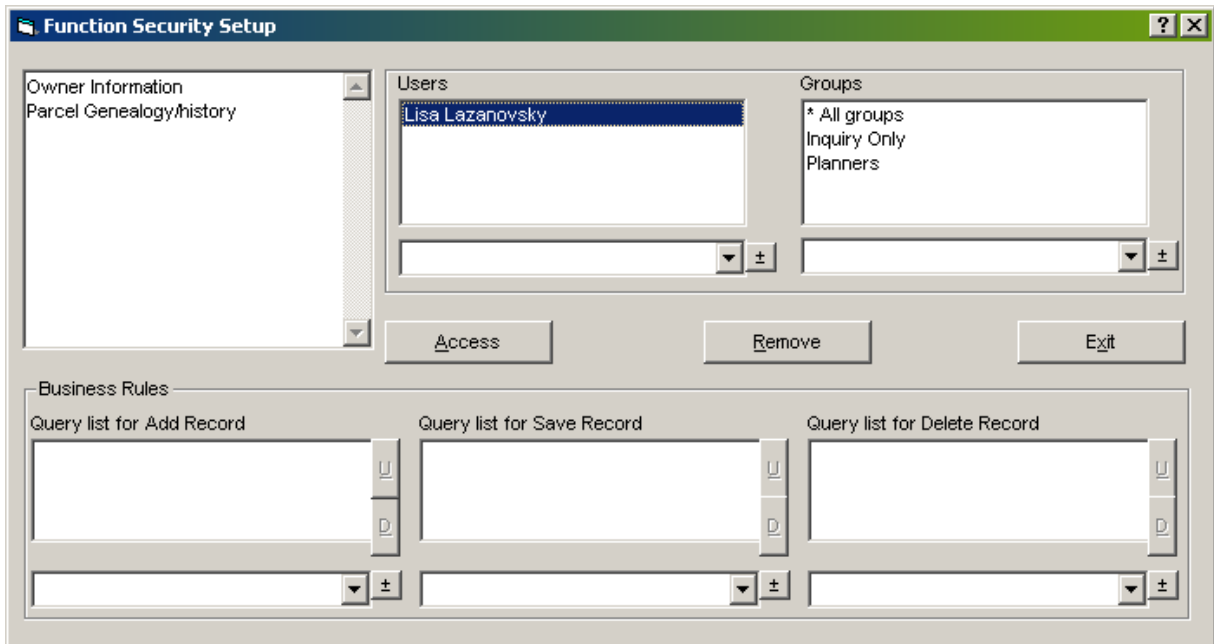
Security configuration for a single function will establish security configuration is required for a single function

To set security for a single function...

1. Select the function and click **S**.

2. The *Function Security Setup* screen will be displayed.

> **Note:** The information displayed in this form are the access rights for this function; these are the rights that will be saved.

The setup of this form is described in the *Functions Setup* section of this guide.

Multiple Function selections

Should you be required to establish access rights for multiple functions, an extended selection can be performed using the *Shift* + Click or *Ctrl* + Click key combinations. This will allow you to configure user or group access to multiple functions at once. When using this extended selection technique it is important to note that **the first function selected** is the function that will determine the access rights to all selected functions.

For example, we want to establish security for the Assessor's Office, and set the right for the following functions:

- Activities

- Building Drawing
- Building Information
- Building Miscellaneous Structures
- Building Structural Elements & Features

The *Activities* function is selected first. Using the extended selection technique of *Ctrl + Click*, the other *Building* functions were selected. As *Activities* was the first function selected, the rights that have been established for it will be the ones to be used for the group. This will be displayed when you click **S**. In addition, when the rights are saved, any previous rights that were established for any of the selected functions are deleted and replaced with the new rights associated with the *Activities* function.

Note: When selecting multiple functions, select the first function and click **S**. This will allow you to see the rights associated with the function. If an extended selection of other functions are made, they will have the same security rights.

CoolBar Queries Setup

Govern CoolBar

The Govern *CoolBar* runs along the lower section of the Govern toolbar and displays data on the current record. By default, this includes the tax map number, owner name and address, occupant name, mailing index and property location, as well as data from the open functions, such as permit and license certification, registration or application numbers, inspection date and time and the utility billing account number. You can modify the background and foreground colors of each item and also reposition them on the CoolBar. *Refer to the General Information guide for details*.

CoolBar Queries Setup

Use the *CoolBar Queries Setup* form to add customized SQL queries to the Govern CoolBar. These queries are used to retrieve other data; such as the appraised value, building value, neighborhood or property class.
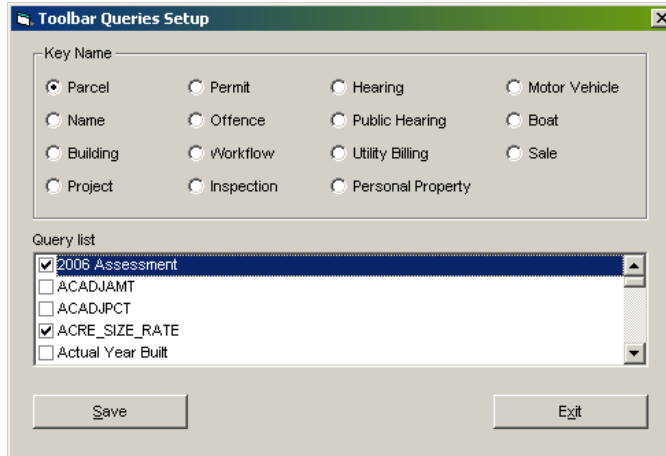
The query is displayed on the *CoolBar Customization* screen in Govern, by description and result, as follows:

[SQL] Building Value: $90,193.00

The result of each query is displayed as a separate item on the CoolBar. You can modify it and reposition it, as any other item.

Building Value: $90,193.00

To include a pre-defined SQL query, select the **CoolBar Queries** button on the *Department Setup* form. This displays the *CoolBar Queries Setup* form.

Key Name: Select the record set key name to use with this query.

Query List: Select the query you want to use from the list.

> **Note:** The queries must be created beforehand using the SQL Definition Setup form. *See SQL Queries on page 211 for details.*

> **Note:** Only **Selection Queries** can be added to the CoolBar.

Typically, *CoolBar Queries* return a single result and this is displayed as a single item on the CoolBar. In the following example, however, the sales date, deed book and page number have been concatenated so that they are displayed as single item.

SQL Query Example

```
SELECT 'Date: ' + CAST(SALE_DATE AS VARCHAR) + ' / Book: ' + CAST(DEED_BOOK AS
   VARCHAR) + ' / Page: ' + CAST(DEED_PAGE AS VARCHAR)AS RESULT
FROM MA_SALES
      WHERE SALE_ID IN (SELECT TOP 1 SALE_ID
         FROM PC_LK_PARCEL_SALE
WHERE P_ID = parcel id
          ORDER BY SALE_ID DESC)
```

Result

Sale Date Book Page: Date: Aug 8 2004 12:00AM Book: 500 Page: 50

You can also format the query result, by adding characters to the beginning of the query name. See *Query Name (Code) on page 214* for details.

Coolbar Queries and Exported Databases

Inspector or Appraiser databases are extracts of *Oracle* or *SQL* databases. These extracted databases are in *Microsoft Access* format which supports only the most basic SQL query syntax. Issues occurred when *Coolbar Queries* used SQL functions that were not recognized by the extracted *Microsoft Access* database. As a result prior to version 10.0, Coolbar Queries were not copied to extracted Inspector or Appraiser databases. Since you are now able to direct your Coolbar queries to connect through the Access attach table, they are now copied with the extracted database.

Communicating with the Database

When users are connected to the main database, they can communicate in two (2) ways:

- Directly with the database
- Through an Access attach table

By default, users query the database directly using SQL. You can now choose how your query will connect to the database.

To direct a query to access the database through the Microsoft Access attach table...

1. In *Govern Admin*, select *Setup* > **SQL Definition Setup**

2. On the *SQL Definition Setup* form, create your query then select **Query Access Format**

When this option is selected, the system will know that when this particular query is executed, it will be through the Access attach table.
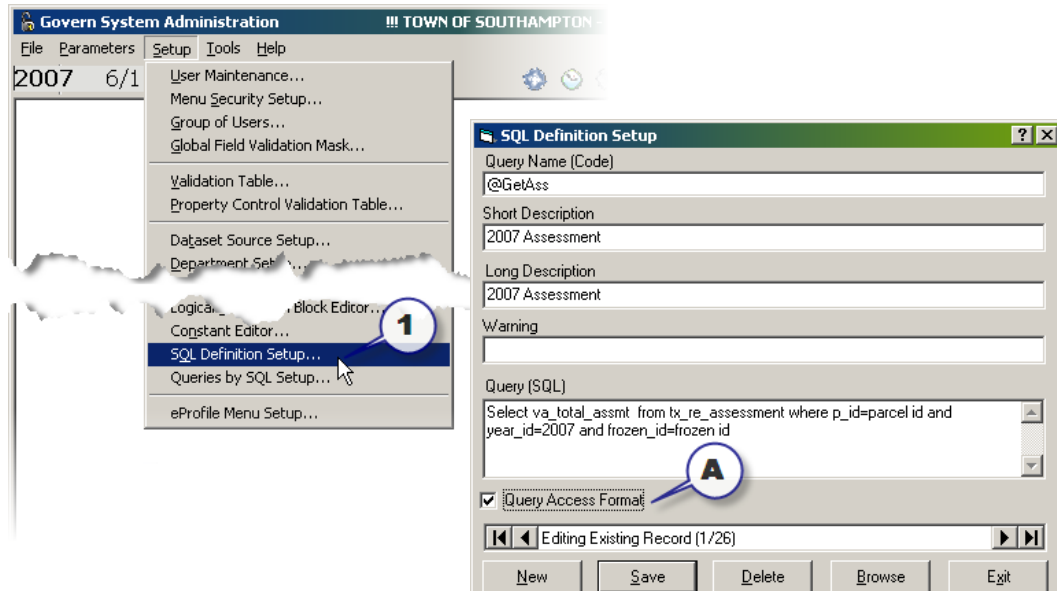
Note: It is recommended that Coolbar queries, or queries used in formula calculations, be written in Access syntax particularly if they will be used in extracted Inspector or Appraiser databases.

Department Setup Command Buttons

Creating a New Department: Click **New** to clear the form and enter a new department setup.

Saving a Department: Click **Save** to save a new department setup, or any modifications made to an existing one.

Deleting a Department: Click **Delete** to remove the current department record.

Browsing Department Records: Click **Browse** to view a list of all the department records.

CoolBar Queries : Click **CoolBar Queries** to select a user-defined query that will retrieve additional data from the current record and display the result on the *Govern CoolBar*. The queries need to be created through the *SQL*

Definition Setup form. For example, you could set up a query to retrieve the value of the buildings that are linked to the parcel. *See CoolBar Queries Setup on page 118 for details.*

Exit: Click **Exit** to close the form. A confirmation message is displayed if there are any unsaved modifications.

Functions Setup

📖 Overview
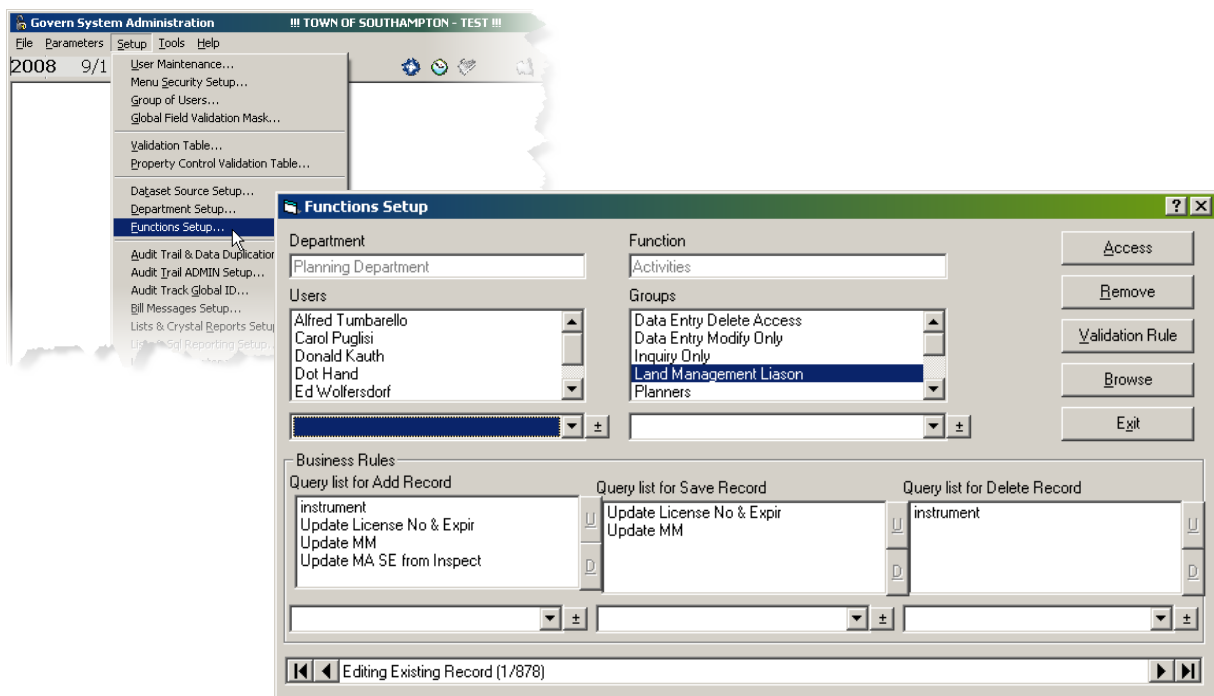
Grant and restrict access to the Govern functions on the *Functions Setup* form. Access is set by department, group and user. You can also add your own business rules to the *Add, Save* and *Delete* buttons of any Govern function, from this form.

It is possible to add selection queries for validation in functions, for example, you could create a validation for the *Planning Department* when a *General Permit* is requested. The query could verify that there are no amounts owed to the municipality as a condition to allowing the Permit to be issued.

Validations are performed with preexisting selection queries, or queries can be created by selecting a button on the form.

To access this form, from Govern's main screen:

1. Select *Tools* > **System Administration (Govadm32.exe)**

2. In Govern Admin select *Setup* > **Functions Setup**

Function Setup Command Buttons

Access: To view or modify the access rights of a user or group, highlight the user or group name and select **Access**. See *Assigning User and Group Access Rights to a Function on page 125*

Remove: To remove user or group access rights to a function, highlight the user or group name and select **Remove**. Similarly, to remove a query from the **Add**, **Save** or **Delete** button, highlight it in the list and select **Remove**.

Validation Rule: Click **Validation Rule** to specify validation rules for the *Function*, *Users*, and *Groups. See Validation Rule Setup for a Function on page 128 for details.*

Browse: To view a list of the functions, by code, short and long description, select Browse.

Exit: Select **Exit** to close the form and save any modifications.

Functions Setup Parameters

Department: This field displays the name of the department for the access rights records.

Function: This field displays the name of the function for the record.

Users: This list box displays the names of the users with access rights to the function.

Creating a User Account: Click ± to open the *User Maintenance* form and enter the information for a new user account, as described under *User Maintenance on page 60*. The new user is added to the drop-down list when you click **Save** on the *User Maintenance* form.

Groups: This list box displays the names of the groups with access rights to the function.

Creating a Group: Click ± to open the *Group Validation Table* form and enter the information for a new group. The group is added to the drop-down list when you click **Save** on the *Validation Table Header* form. *See Group Validation Table on page 75, for more information*.

Business Rules: These list boxes display the user-defined queries linked to the **Add**, **Save** or **Delete** button of the function.

Creating a Query: Click ± to open the *User Defined SQL Definition* form where you can create a new query. This is added to the drop-down list. *See SQL Queries on page 211, for more information.*

Assigning User and Group Access Rights to a Function

> **Note:** In the *Functions Setup* form, you are configuring access rights to a single function for a single department. Any changes made here are related to access to the individual function. Access rights that are established here may be overwritten when access rights are set in the *Department Setup* form. It is therefore recommended that department access rights are configured first prior to setting access rights.for individual functions.

> **Note:** When assigning user rights and group rights, individual user rights will always take precedence over group rights.

To set user and group access rights, by function.

1. In Govern Admin, select *Setup* > **Functions Setup...** to launch the *Functions Setup* form.
2. Select the function for which you want to set access rights.
3. Select the user or group from the drop-down list to add them to the list box.
4. Highlight the user or group in the **Users** or **Groups** list box.
5. Select **Access** to open the *Access Type* screen.
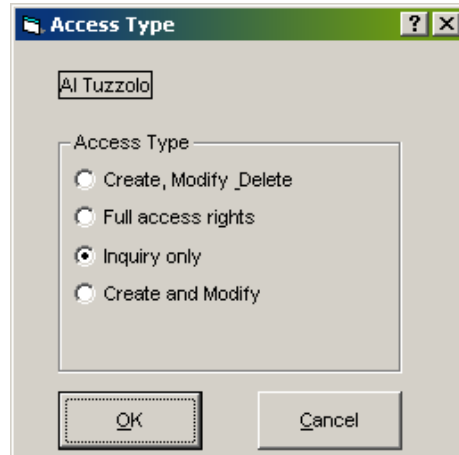
6. Select the *Access Type*.

7. Click **OK**.

There are four *Access Types*:

- **Create, Modify, Delete**: The user can view, create, modify and delete data for the specified function.
- **Full Access Rights**: The user can view, create, modify and delete data and could also modify and delete **historical data** for the specified function.
- **Inquiry Only**: The user is only able to view the data for the specified function.
- **Create and Modify**: The user can view, create and modify data for the specified function.

See User Maintenance on page 60 for more information on Access Types.

Removing Access Rights from a User or Group

To remove access rights, select the user or group in the **Users** or **Groups** list box and click **Remove**.

Adding Business Rules to a Function

You can link one or more *Business Rules* or queries to the **New**, **Save** and **Delete** buttons of a function. These queries need to be pre-defined through the *User Defined Queries Setup* form in Govern Admin. In addition, they must be *Selection Queries*. They can be applied to both existing and user-defined parameters. *See SQL Queries on page 211*.

To link queries to a command button:

1. In Govern Admin, launch the *Functions Setup* form.

2. Select the function to which you want to link the queries.

3. Select queries from the drop-down list to add to the list box for the **New**, **Save** and **Delete** buttons, as applicable.

> **Note:** Only *Selection Queries* appear in the drop-down lists.

4. Highlight the query in the list box and select **U** to move it towards the top of the list or **D** to move it towards the bottom.

Queries are executed as follows:

- Queries in the **Query List for Add Record** are executed when you save a new record; i.e., when you click **New**, enter your data; then, click **Save**.
- Queries in the **Query List for Save Record** are normally executed when you click **Save**.

> **Note:** If you have queries in both the **Add Record** and **Save Record** lists, the queries in the **Add Record** list are executed for a *new record* but not those in the **Save Record** list.

- Queries in the **Query List for Delete Record** are executed when you click **Delete**.
- Queries in each list are executed in the order they are displayed.

See Linking Queries to a New Command Button on page 262 for details on executing a query from a customized command button.

Modifying Functions

Changing the Function Name

You can change the name of any function, to a name of your choice, using the *Validation Table Header* form.

To access this form:

1. In Govern Admin, click *Setup* > **Validation Table**.

2. Select the **System** option.

3. Select **Browse**.

4. In the *Browsing* screen highlight **funct** and click **Select**.

5. Modify the **Short** and **Long Description**.

> **Note: DO NOT** to modify the **Code**.

6. Click **Save**.

See Validation Tables on page 85 for more information on this form.

Changing the Function Icon

You can also change the icon of any function to an icon of your choice:

To change a function icon.

1. Rename your icon to `functxxx.ico`, where `xxx` is the value from the **Code** field in VT_SY_FUNCT, of the function, as displayed on the *Browsing* screen of the *Function Setup* form.

2. Copy your icon to the Govern bitmap directory, typically this is `\Govern\bitmap`.

> **Note:** Whenever you install a new version of Govern, the Govern bitmap directory is overwritten. Ensure that you have a backup of your icons so that you can recopy them, when the upgrade is complete.
>
> Your modified function names are not overwritten.
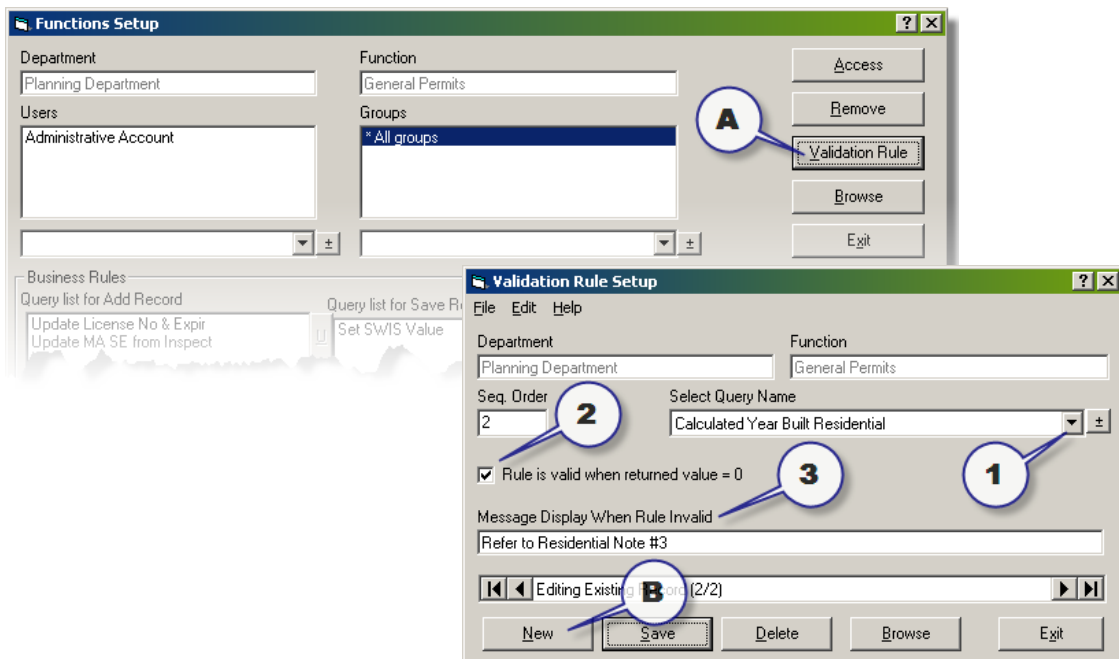
Validation Rule Setup for a Function

The *Validation Rule Setup* form allows you to configure existing SQL selection queries, or create new queries that will be used for a validation. The result of this validation is a *Yes* or *No* (1 or 0).

For example, in the *Legal Description* function, a rule could be set up to validate *Property Type* with a specific *Levy Code*. With validation in place, If a property type does not match a selected levy code, you could say that the user would not be able to save the entry and an error message would be displayed.

To setup a Validation Rule in Govern Admin:

1. Click **Validation Rule** on the *Right Hand Side* **(RHS)** of the Functions Setup form.

2. In the *Validation Rule Setup* form, select an existing query, or click **New** to create a new record.

3. Select a query from the *Select Query Name* parameter or click ± to open the *SQL Definition Setup* form.

As stated, the queries used are selection queries, when executed they will return a value of 0, if false, or 1, if true. As in *Business Rules*, you can specify when the rule is valid.

4. Select the **Rule is valid when return value = 0** option if the query returns with a zero.

> **Note:** To make your validation user friendly, include a message that is to be displayed when the rule is invalid.

5. Enter a message string in the **Message Display When Rule Invalid** parameter.

Multiple Validation Queries

To have multiple validation queries:

1. Click **New** in the *Validation Rule Setup* form and select or create a new query. With each click on **New**, the sequence order (**Seq. Order**) number increments by one.

To change the sequence that the validation queries are executed, change the value that appears in the **Seq. Order** parameter.
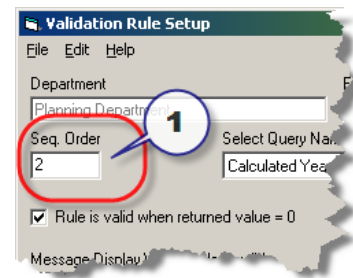
Note: Ensure that you do not have duplicate sequence order (Seq. Order) numbers.

Audit Trail and Data Duplication Setup

📖 Overview

Track modifications to selected Govern tables, by function, using the *Audit Trail* form. When you set up the audit trail, an entry is created in the USR_ AUDIT_TRAIL table, for each modification.

You can set up an audit trail from modifications made to *Govern Admin* forms and for processes run through *Govern Batch Processing*. See *Govern Admin Audit Trail on page 134 for details*.
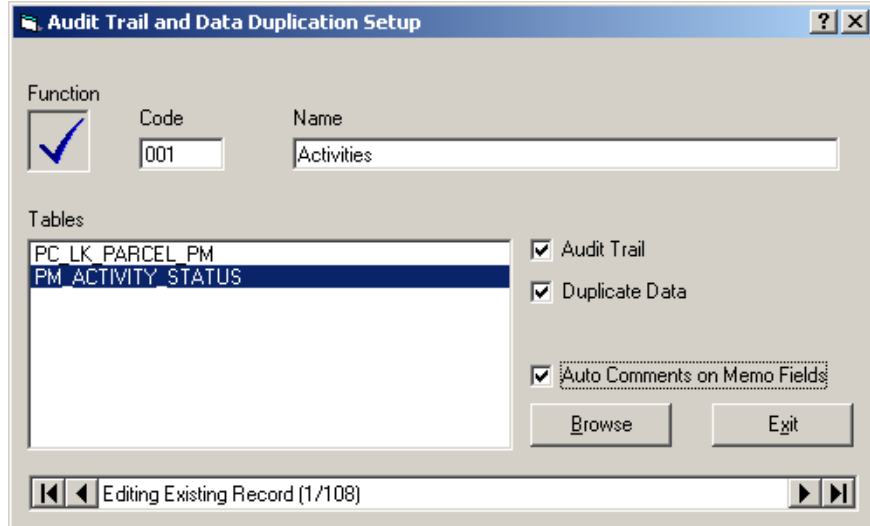
For a complete and exhaustive tracking of a record and its fields, you must select the *Full Audit Trail* option in *Govern Admin*. All audit information is updated to the USR_AUDIT_TRAIL table. *See Full Audit Trail on page 30.*

Modifications made to Govern Admin forms are saved to USR_AUDIT_ADM, while audited information on Govern Batch processes is saved to USR_ AUDIT_ ATCH.

Define the data that can be duplicated from an existing property to a new one, using the *Data Duplication Setup* form. When you create a new property, or perform a Split / Merge, a confirmation message appears asking you to confirm that you want to duplicate all the items selected on the screen.

To access this form, from Govern's main screen:

1. Select *Tools* > **System Administration (Govadm32.exe)**

2. In Govern Admin select *Setup* > **Audit Trail and Data Duplication Setup**

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Setting the Audit Trail and Duplicate Data Parameters: To change the default setting for these functions, select a table from the list, then check or deselect audit trail and duplicate data accordingly.

Browsing the Govern Functions: Click **Browse** to view a list of the functions, by code and long description.

Function: This field displays the icon of the function.

Code: This field displays the code for the function.

Name: This field displays the name of the function.

Tables: This field displays a list of the tables associated with the function.

Audit Trail: If this option is selected, then it allows you to keep track of all modifications (Create / Update / Delete) made to the selected tables.

Note: For a full exhaustive audit trail, it will be necessary to select the **Full Audit Trail** option. *See "Full Audit Trail" on page 30. for details*

Duplicate Data: Select this option to duplicate the data from the selected table to a new property.

Note: Only tables that have a P_ID field can be duplicated.

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When you create a new property, or perform a Property Split, Merge or Remap, you are prompted to duplicate all the selections you have made.

Auto Comments on Memo Fields: Select this option to enable the *Name and Time Stamp* feature for the selected function. This adds the user name, along with the date and time of the entry, to any text added to the *Notes & Comments* field of the function.
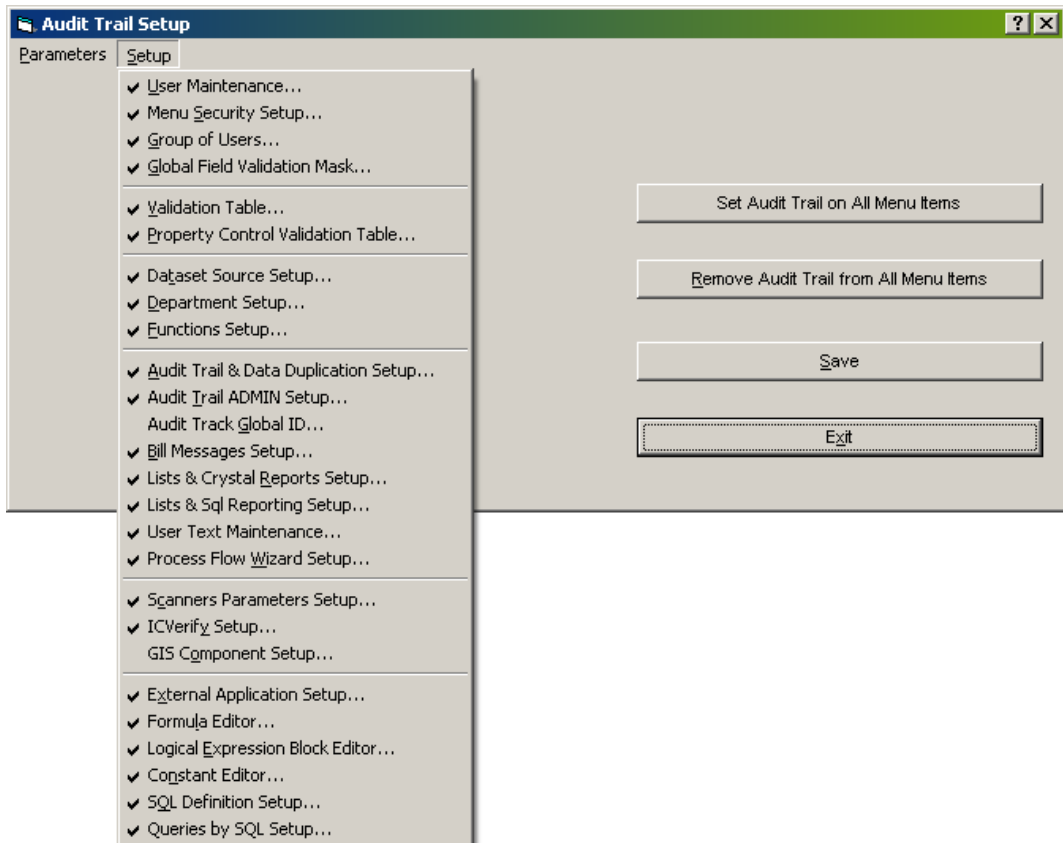
> **Note:** If the **Add User Name and Current Date in Notes (Memo)** field is selected on the *System Registry Maintenance* form, the user name and time stamp are added to all memo functions and this is option is disabled. Otherwise, you can select or deselect it for each function.

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Govern Admin Audit Trail

📖 Overview

You can create an audit trail to track modifications made in *Govern Admin*. You need to select the forms on which you want to set the audit trail. Modifications are saved to USR_AUDIT_ADM.

Setting up an audit trail is similar to granting access to menu items through the *Menu Security Setup* form.

To set an audit trail to a menu item:
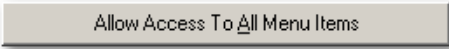
1. In Govern Admin, select *Setup* > **Audit Trail ADMIN Setup...**

2. In the *Audit Trail Setup* form, select **Parameters** or **Setup**, depending on where the item is located.

3. Select the menu option to grant access. Deselect it to restrict access.

> ☑ The audit trail is set on all forms and features that are selected on the menus.

4. Click **Save** to save modifications to USR_AUDIT_ADM. Changes are saved by User ID and date. The type of action, such as create, modify, insert or delete is recorded as is the field name that was changed, with the previous and new values.

5. Click **Exit** to close the form.

| Allow Access To All Menu Items | Click **Set Audit Trail on all Menu Items** to set the audit trail for all forms in Govern Admin. |

> **Tip:** If you are setting an audit trails for all but a few forms, select this option, then remove the audit trail from the specific forms, by deselecting the applicable options.

| Remove Access To All Menu Items | Click **Remove Audit Trail to all Menu Items** to remove the audit trail from all Govern Admin forms. |

> **Tip:** To set the audit trail on only a few forms, you can select this option, then select the forms on which you want to set the trail.

Audit Track Global ID

This feature allows you to track the access and length of time of selected ID's (Table: USR_TRACK). This is an administrative feature that should be used with some caution as the table can be quickly populated.
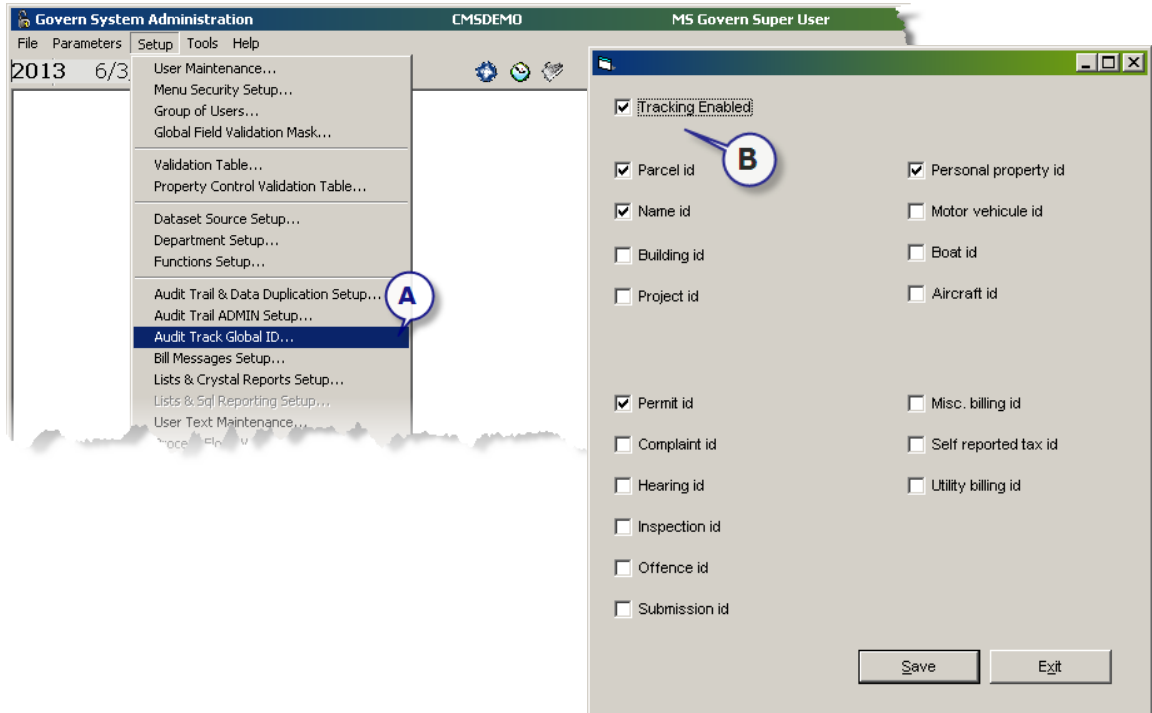
When selected, the information tracked are as follows:

Parameter Name	Description
TRACK_ID	The sequence number.
USR_ID	ID of the user that generated the record.
ID_NAME	ID name that is was selected to be tracked.
ID_VALUE	Value of the ID.
START_TIME	Date and time that the event ID was generated.
END_TIME	Date and time that the event ended.
DURATION	Elapsed time in seconds.

This information can be obtained through a custom report.

Bill Messages Setup
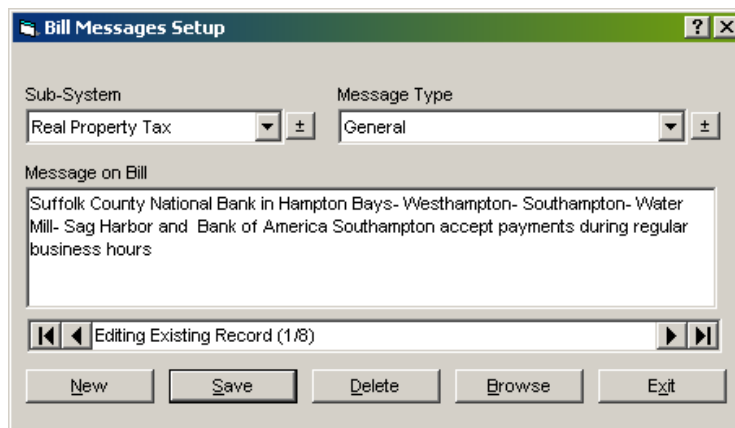
📖 Overview

Add a message to your next billing run using the *Bill Messages Setup* form. This message is valid for one billing only. The message is defined by *Message Type* and by subsystem. For example, you can define a message to be printed on duplicate bills created for Real Property tax.

> **Note:** This message is valid for one billing only.

To access this form, from Govern's main screen:

1. Select *Tools* > **System Administration (Govadm32.exe)**

2. In Govern Admin select *Setup* > **Bill Messages Setup**

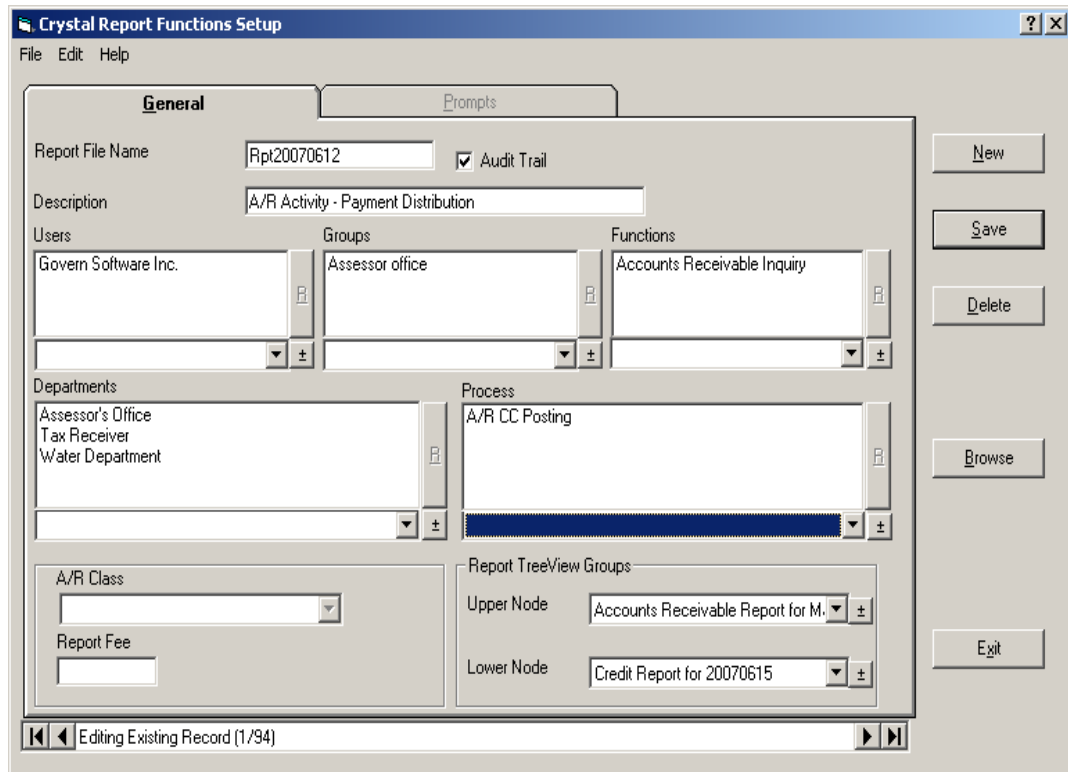### Bill Messages Setup Parameters

Subsystem: Select a Sub-system (Land Management, Real Property Tax, Special Assessment, and Utility Billing) from the drop-down list.

Message Type: Select a *Message Type* from the drop-down list (Table: VT_ USR_MESSBILL).

Message on Bill: Enter the message that will appear on the bill.

Message Types

The following table provides a list of Message Types with associated criteria:

Code	Message Type	Criteria
1	General Message	Primary Index is the Owner (active), no Mortgage OR Primary Index is the Owner (inactive) and temporary owner [Code x]
2	Information Only	Primary Index is the Owner (active) and Additional Owner
3	Third Party	Third Party
4	Owner with Mortgage	Primary Index is the Owner with Mortgage
5	TSO / Mortgage	TSO / Mortgage

Note: It is important to keep these codes intact. You can, however, define other codes for use with additional message types, through the *Validation Table Header* form. *See Validation Tables on page 85.*

Attaching a Message to a Bill

When you run the bill printing process, only the bills linked to the selected message are printed. If you do not select a message type, only the bills with no linked message are printed.

Bill Messages Setup Command Buttons

Creating a New Bill Message: Click **New** to clear the form and create a new message.

Saving a Bill Message: Click **Save** to save a new message setup or any modifications to an existing one.

Deleting a Bill Message: Click **Delete** to remove the current message setup.

Browsing Bill Messages: Click **Browse** to view a list of the messages for all sub-systems.

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Lists & Crystal Reports Setup

📖 Overview

Use the *Crystal Reports Setup* form to define the properties for Govern's reports. Set user access permissions, link functions and batch processes and associate a fee. In addition, you can create prompts, to have the user dynamically set the selection criteria.

> **Tip:** To make it easier for users to find and select the reports they need, create a *Tree View* for displaying reports in Govern.

To access this form, from Govern's main screen:

1. Select *Tools* > **System Administration (Govadm32.exe)**

2. In Govern Admin select *Setup* > **Lists & Crystal Reports Setup...**

> **Note:** The paths to Govern's standard and customized reports are defined on the *System Registry Maintenance* and *User Registry Maintenance* form in Govern Admin. *See System Registry Maintenance on page 16.*

Standard reports have been removed from Govern Admin. All reports are launched from *Govern* or *Govern Batch Processing* and need to be linked to a data entry function or batch process or added to the *Report Tree View*, in *Govern for Windows. See Linking Functions and Batch Processes on page 143 and Creating a Report Tree View on page 144. For a list of the standard reports, see Appendix A: Standard Reports on page 320*.

To access the **Lists & SQL Reports** form from Govern's main screen, select *Tools* > **System Administration (Govadm32.exe)**

OR

Click 🔓 then select *Setup* > **Lists & SQL Reporting Setup...**

Lists and Reports Command Buttons

The following are the command buttons that appear on both the *Crystal Report Functions Setup* form and the *SQL Reporting Functions Setup* form.

Browsing Reports: Each report is saved as a separate record. Use the right ▶ ▶| and left |◀ ◀ navigational buttons to display each record or select **Browse** to view a list of the existing reports. Reports are displayed on the *Browsing* screen, by code and long description.

Creating a New Report: Click **New** to create a new report setup.

> **Note:** You need to enter a name for the report and click **Save** before selecting the Govern function or Batch Processing form or granting user access rights.

Saving a Report: Click **Save** to save a new report setup or any modifications to an existing one. This report must be saved to the directory specified on the *System Registry Maintenance* or *User Registry Maintenance* form. *See User Registry Maintenance on page 53 and System Registry Maintenance on page 16 for more information*.

Deleting a Report: Click **Delete** to remove the current report setup from the database.

Lists and Reports Fields

Report File Name: Enter the *report file name*.

> **Note:** The report must be saved in either the *Report Folder* or the *Custom Reports Folder* defined on the *System Registry Maintenance* or the *User Registry Maintenance* forms.

Description: Enter a description of the report.

Audit Trail: Select this option to create an entry in the USR_AUDIT_RPT table, each time the report is generated.

Defining User Access Permissions

You can define user access permissions by user, group or department.

Users: To grant user access to the report, select the users from the drop-down list. To create a new user account, click the ± button. This opens the *User Maintenance* form. *See User Maintenance on page 60 for details*.

To remove access to the report from a specific user, highlight the user in the list and click **R**.

Groups: To grant group access to the report, select the groups, from the drop-down list. To create a new group, click the ± button. This opens the *Group Validation Table* screen, where you can create the new group. *See Creating a Group on page 75.*

To remove access to the report from a specific group, highlight the group in the list and click **R**.

Departments: To grant access to the report for one or more department, select the departments from the drop-down list.

To create a new department, click ± . This opens the *Department Setup* form, where you can define a new department. *See Department Setup on page 101 for details.*

To remove access to the report from a specific department, highlight the department in the list and click **R**.

Linking Functions and Batch Processes

Use the procedures in this section to open and run one or more reports directly from a function or on completion of certain batch processes.

Functions: To generate reports directly from a Govern function, you need to complete two procedures:

1. Select the function, from the drop-down list on this *Report Functions Setup* form.

2. Launch Govern, open the function and use the *New Command Button* form to link the report or reports, as described under *New Command Buttons on page 257.*

   There are now two ways to launch a report, from a new command button:
   • Directly from the command button, In *Quick Access Mode*
   • From a list of reports, launched from the command button.

> **Note:** You need to repeat this procedure, for each function, from which the report is to be generated.

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To remove a function from the list, highlight the function and click **R**.

Process: To generate the report automatically, on completion of a batch process, in Govern Batch Processing, select the process from the drop-down list. When the user runs the process, a confirmation message, *Do you want to run the Crystal Report?*, appears.

To remove a batch process from the list box, associated with the report, highlight the process and click **R**.

> **Note:** Only the batch processes displayed in the drop-down list can be associated with a report.

Associating a Fee with a Report

A/R Class: To link an A/R Class code to the report, highlight a department; in the *Departments* list box; then, select the A/R Class code from the drop-down list (Table: VT_USR_AR_ CLASS).

Fee: Enter a fee to associate with the report. This field is linked to the A/R subsystem.

Creating a Report Tree View

To make it easier for users to find and select the reports they need, organize your department's reports under two levels of headings and display them in a tree view in Govern, For example, you can use the names of the subsystems as the top-level headings: *Accounts Receivable*, *Tax Assessment and Billing*, *Utility Billing*, etc. Then, create secondary headings, according to the information in the report, Credits, Debits, Payments, Real Property Tax or Personal Property Tax.

The user displays the Report Tree View, by selecting **File** > **Open** or **Ctrl** + **R**. *Refer to the General Information guide for further details on this screen.*

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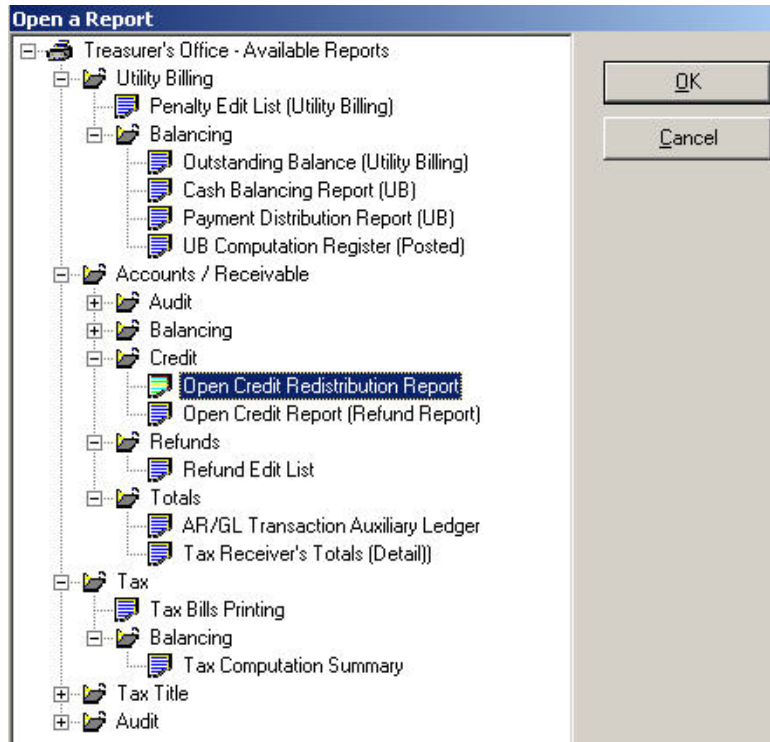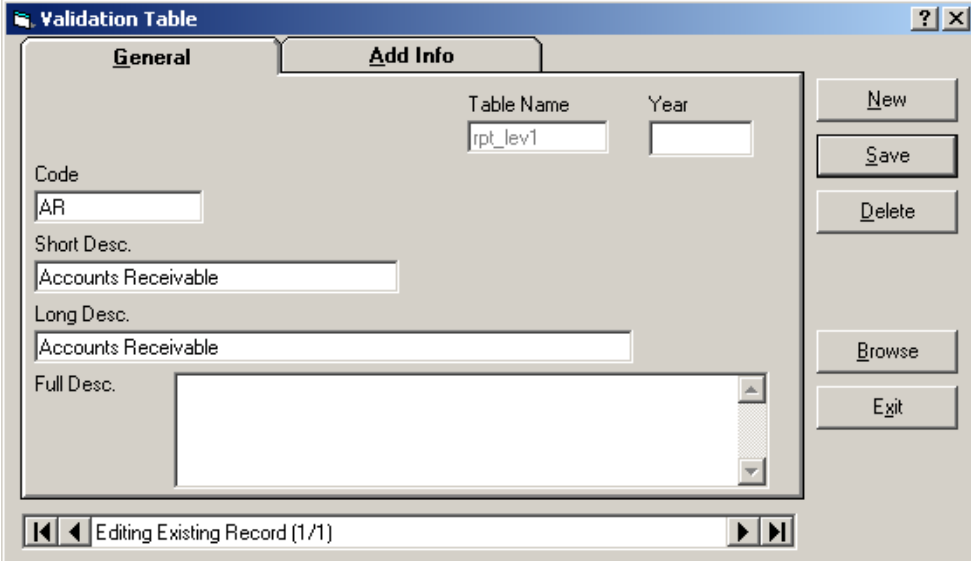
In order to create the tree view, you need to define the headings, then, select both the top-level heading, the *Upper Node,* and the secondary level, the *Lower Node*, for each report.

Creating the Headings

To create the Upper Node:

1. Click ± to open the validation table, VT_USR_RPT_LEV1.

2. Enter a code, short description and long description.

3. Click **Save**.

4. Click **New** and repeat steps 2 and 3 until you have all your first level headings.

To create the Lower Node:

1. Click ± to open the validation table, VT_USR_RPT_LEV2.

2. Enter a code, short description and long description.

3. Click **Save**.

4. Click **New** and repeat steps 2 and 3 until you have all your second level headings.
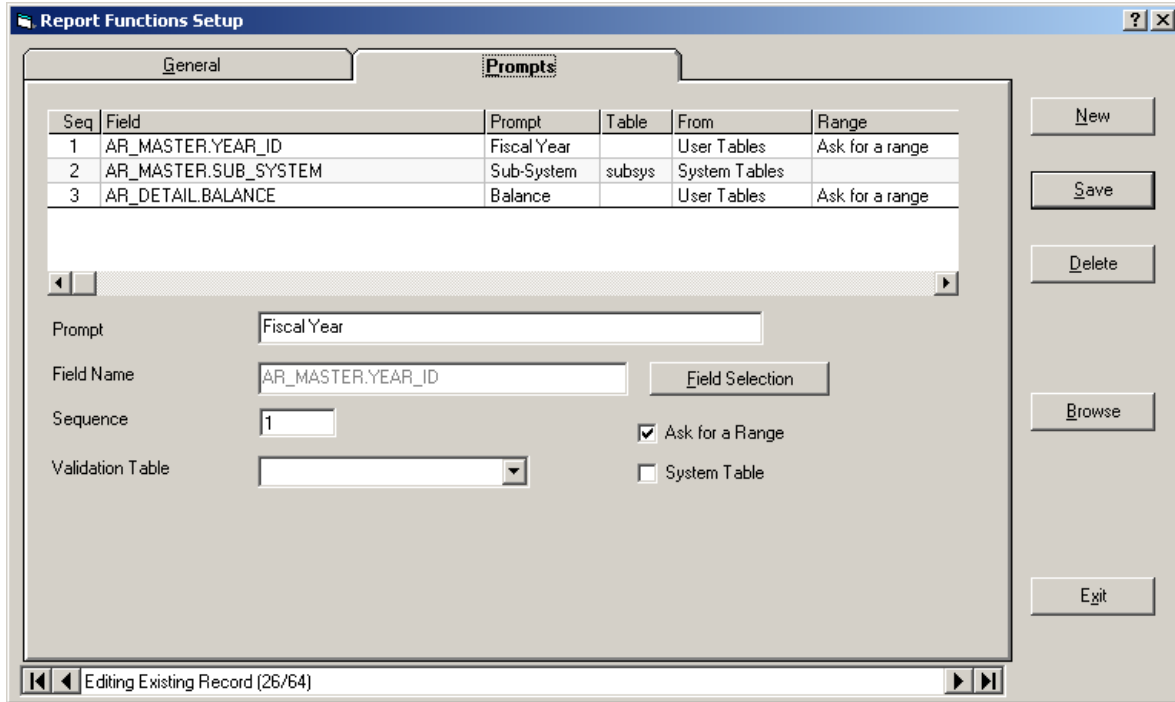
Selecting the Headings

You need to select both the Upper and the Lower Nodes, for each report.

1. Scroll to the report.

2. Select the top-level heading, from the **Upper Node** drop-down list.

3. Select the secondary heading, from the **Lower Node** drop-down list.

Note: You can create a new heading, by clicking the ± button.

Creating User Prompts

To create a prompt:

1. Select a report on the **General** tab.

2. Select the **Prompts** tab.

3. Click **New** and complete the following fields as described in this section:

Prompt: Enter a label for the prompt.

Field Name: Click **Field Selection** to select a field for the prompt. The following screen is displayed:
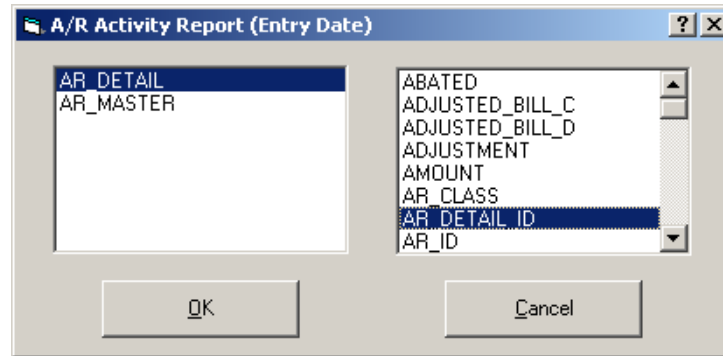
Report Field Selection: Select the table, from the left, and the field, from the right, to display when generating the report. Then, click **OK**.

Sequence: Enter a sequence number. This defines the order the field appears on the report.

Validation Table: If the field has to be validated, choose the validation table from the list box.

Ask for a Range: Select this option to prompt the user to enter a range for the selected criteria; such as range of dates or values, when the report is generated.

System Table: Select this option if the validation table is a system table.

Sample Report Generation Prompts

The following screen shot displays the report with user-defined fields:
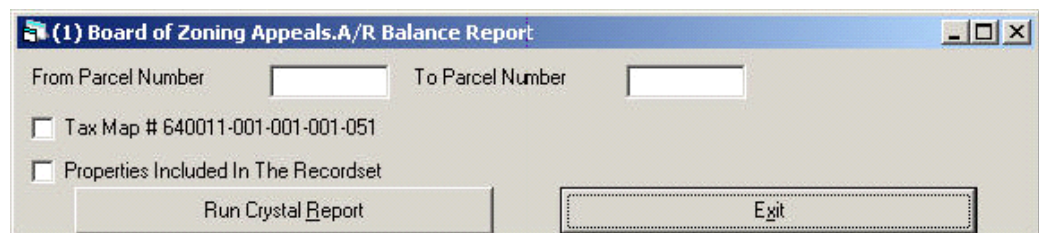
Govern Standard Reports

Crystal Reports are generated based upon data that is obtained from Govern. In some instances user action in the form of a prompt is required to filter the data, e.g. entering a date range. In other instances the data must first be extracted and then go through a "preprocess" step.

Currently there are six (6) Govern standard reports that require data pre-processing. These reports are specific to the *Govern Land Management* module. Should you wish to use any of these reports, you must first configure the preprocessing for them. This can be done by configuring prompts in the *Crystal Report Functions Setup* form.

- PM_APPLIST.rpt
- PM_CERTLIST.rpt
- PM_EXPAPLST.rpt
- PM_EXPCTLST.rpt
- PM_EXPPMLST.rpt
- PM_PMLIST.rpt

Note: Prompts must be configured for each of these reports.

If you try to run any of the aforementioned reports in Govern for Windows, it will look for the configured prompts. If they have not been created, an error will be displayed.

To configure the prompts for these reports in *Govern Admin*:

1. Select *Setup* > **Lists & Crystal Reports Setup...**

2. In the *Crystal Report Functions Setup* form, click **Browse**.
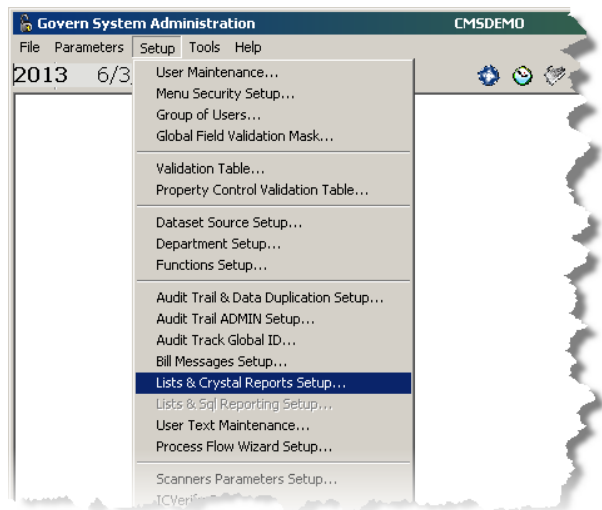
3. From the **Browsing** screen, select one of the six (6) Govern standard reports listed above, in this example we are selecting the *Permits Application Listing* report.
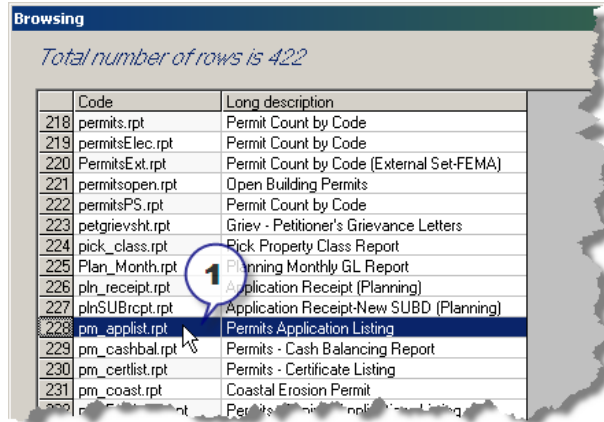
4. Under the *General* tab, configure any additional parameters required for the report, e.g. what departments, which users, etc.
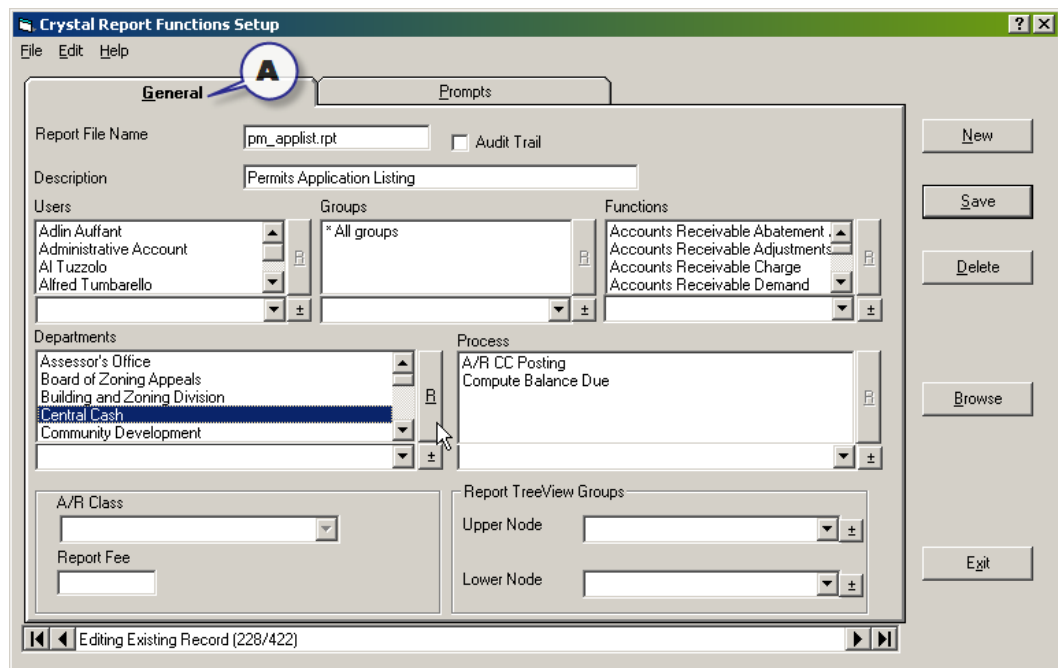
5. Select the **Prompts** tab; click **New** to set up a new prompt for the report.

6. Enter **Start Date** in the *Prompt* parameter

7. Click **Field Selection** to display a list of the fields that are within the report; in this case we require the APPLICATION_DATE within the PM_MASTER field.
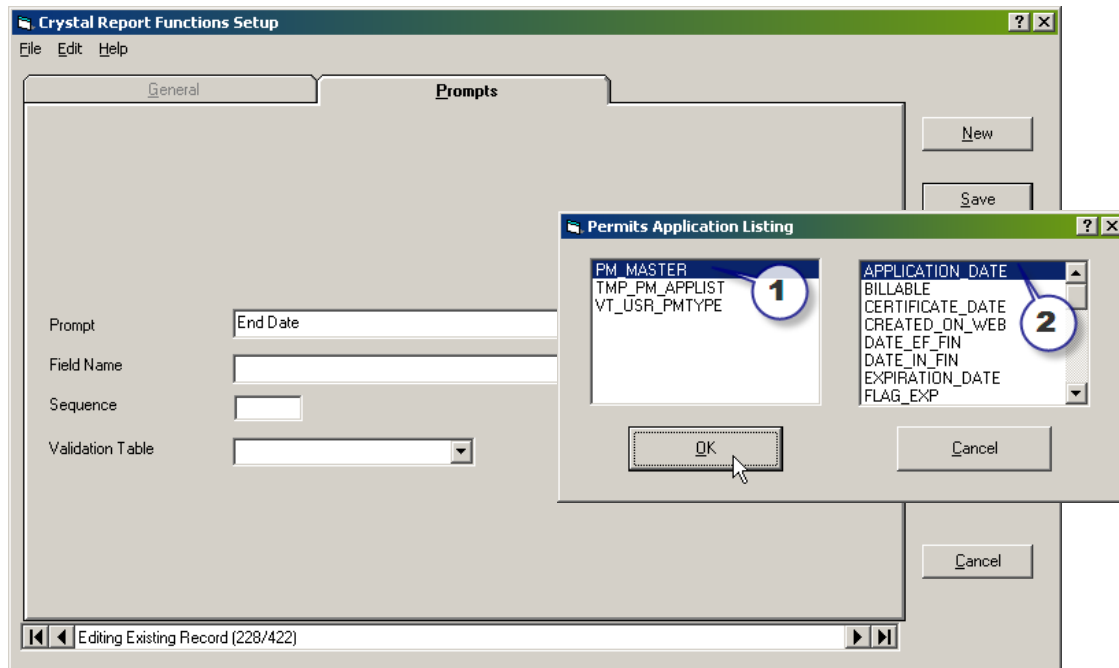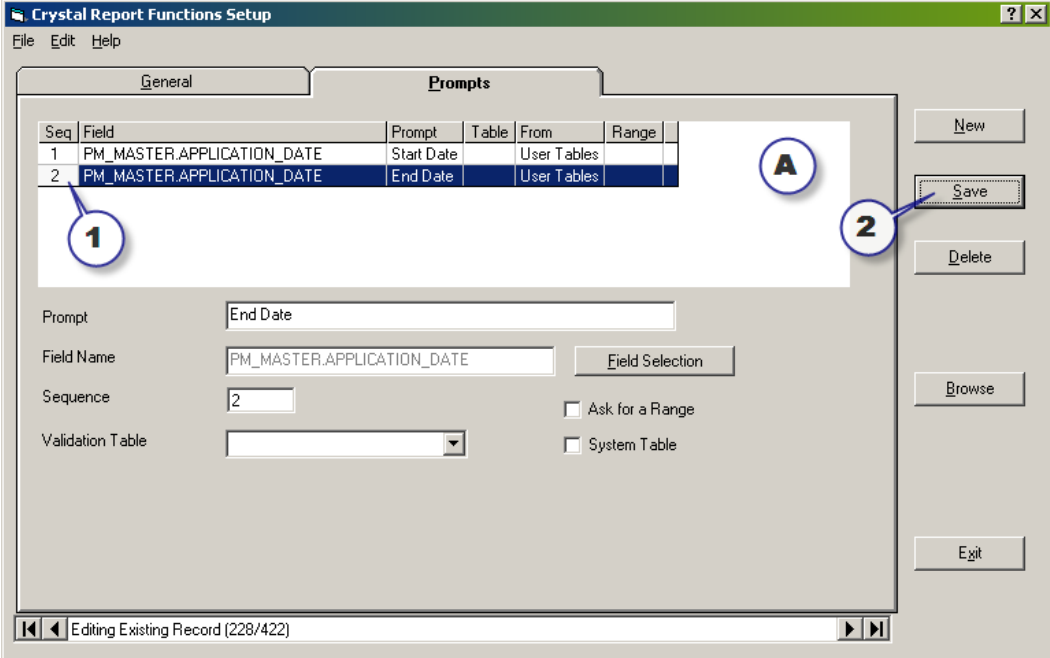
8. Click **OK**; the field name is now copied into the Field Name parameter.

9. Enter a sequence number; for our example we will enter **1** to correspond with the first prompt.

10. Click **Save**.
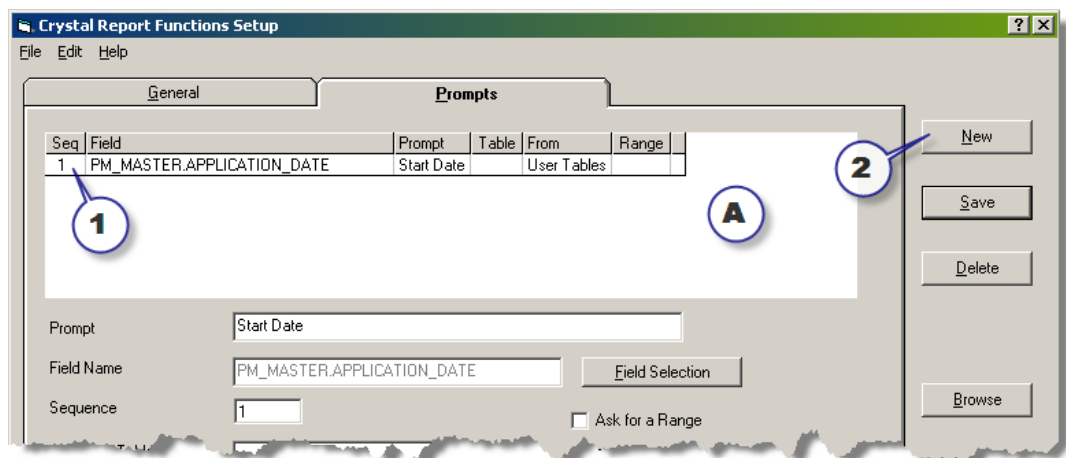
A grid now appears just below the **Prompts** tab, each line will correspond to a prompt that the user will see before the report is run. We now need a second prompt for the **End Date**.

11. Click **New** to make entries to add a second prompt.

12. We need to repeat **Steps 6** to **9** in this procedure to complete the fields for a second prompt. At step 6, enter **End Date** in the *Prompt* parameter, at step 9, enter a **2** for the *Sequence Number*.

13. Click **Save**.

14. A second line corresponding to the second prompt will appear in the grid.

> **Note:** This procedure of creating prompts must be repeated for each of the six (6) standard reports.

Report Function Setup: Formulas

Overview

This section lists the recommended, general, read-only and conditional formulas to include when creating reports through Crystal Reports.

Recommended Formulas

Include the following formulas when you create *Crystal* Reports:

Formula	Definition
@rpt_date (totext (currentdate))	Date & Time
@rpt_name	Report Name
@rpt_Username	Town or Company Name

General Formulas

Govern populates the following *Crystal Reports* formulas automatically, if they are included in your reports:

Formula	Definition
@dept	Department (code)
@dept_label	Department label
@language	Language
@rpt_county	County
@rpt_default_date	Default Date
@rpt_login	User name
@rpt_range	Range Text
@rpt_state	State
@rpt_title	Report Title
@rpt_uid	User identification code (UserID)

Formula	Definition
@uniform	Assessment Equalization Rate
@year	Fiscal year in use by current user in Govern

Read-Only Formulas

The following Crystal Reports formulas are read-only; i.e., they must contain a nonblank value in the report. These formulas trigger specific actions or populate specific formulas:

Formula	Action
@acbill	Refreshes the AC_POST_MASTER table with the current Aircraft ID or the current Name ID (in duplicate bill printing).
@all_ar_needed_ac	Populates the value of several formulas for the current NA_ID and for the all Tax sub-systems. *See Conditional Formulas on page 158.*
@all_int	Updates the following fields in the AR_ SUMMARY table for all installments with positive balance, for all Taxation and Assessment sub-systems and for the current NA_ID. (All updated installment records within a sub-system will contain the same information). LATE_CHARGES (Accrued Penalty or Interest) CHARGE_DATE (Current date as defined in Govern) BALANCE_AS_OF_DATE (Total balance due, exclusive of late charges)
@btbill	Refreshes the BT_POST_MASTER table with the current Boat ID or the current Name ID (in duplicate bill printing).
@drilldown	Enables *Crystal Reports* Drill Down feature

Formula	Action
@govern_tx_interest *This formula is used when calling a Web Crystal Report*	Updates the LATE_CHARGES column in the AR_SUMMARY table. Use when calling a Web Crystal Report in the Real Property Tax Subsystem.
@govern_ub_interest *This formula is used when calling a Web Crystal Report*	Updates the LATE_CHARGES column in the AR_SUMMARY table. Use when calling a Web Crystal Report in the Utility Billing Subsystem.
@mv_ar_needed_ac	Populates the value of several formulas for the current NA_ID and for the Motor Vehicle Excise Tax sub-system. *See Conditional Formulas on page 158.*
@mvbill	Refreshes the MV_POST_MASTER table with current Motor Vehicle ID or the current Name ID (in duplicate bill printing).
@mv_int	Updates the following fields in the AR_ SUMMARY table with motor vehicle excise tax information, for all installments having a positive balance for the current MV_ID. (All updated installment records will contain the same information). LATE_CHARGES (Accrued Penalty or Interest) CHARGE_DATE (Current date as defined in Govern) BALANCE_AS_OF_DATE (Total Balance Due, excluding late charges.)
@pp_ar_needed	Populates the value of several formulas for the current PP_ID and for the Personal Property Tax sub-system. *See Conditional Formulas on page 158.*
@pp_ar_needed_ac	Populates the value of several formulas for the current NA_ID and for the Personal Property Tax sub-system. *See Conditional Formulas on page 158.*

Formula	Action
@ppbill	Refreshes the PP_POST_MASTER table with the current Personal Property ID or the current Name ID (in duplicate bill printing).
@pp_int	Updates the following fields in the AR_SUMMARY table, for the current PP_ID, with Personal Property Tax information, for all installments having a positive balance. (All updated installment records will contain the same information). LATE_CHARGES (Accrued Penalty or Interest) CHARGE_DATE (Current date as defined in Govern) BALANCE_AS_OF_DATE (Total Balance Due, excluding late charges)
@re_ar_needed	Populates the value of several formulas for the current P_ID and for the Real Estate Tax sub-system. *See Conditional Formulas on page 158.*
@re_ar_needed_ac	Populates the value of several formulas for the current NA_ID and for the Real Estate Tax sub-system. *See Conditional Formulas on page 158.*
@re_int	Updates the following columns in the AR_SUMMARY table, for the current P_ID, with Real Estate Tax information, for all installments having a positive balance. (All updated installment records will contain the same information). LATE_CHARGES (Accrued Penalty or Interest) CHARGE_DATE (Current date as defined in Govern) BALANCE_AS_OF_DATE (Total Balance Due, excluding late charges)

Formula	Action
@td_ar_needed	Populates the value of several formulas for the current P_ID and for the Tax Deferral sub-system. *See Conditional Formulas on page 158.*
@td_int	Updates the following fields in the AR_SUMMARY table for all installments having a positive balance, with Tax Deferral information for the current P_ID. (All updated installment records will contain the same information). LATE_CHARGES (Accrued Penalty or Interest) CHARGE_DATE (Current date as defined in Govern) BALANCE_AS_OF_DATE (Total Balance Due, excluding late charges)
@tt_ar_needed	Populates the value of several formulas for the current P_ID and for the Real Property Tax Title sub-system. *See Conditional Formulas on page 158.*
@tt_int	Updates the following fields in the AR_SUMMARY table, for the current P_ID, with Tax Title/Lien information, for all installments having a positive balance. (All updated installment records will contain the same information). LATE_CHARGES (Accrued Penalty or Interest) CHARGE_DATE (Current date as defined in Govern) BALANCE_AS_OF_DATE (Total Balance Due, excluding late charges)
@txbill	Refreshes the TX_POST_MASTER table with the current Property ID or the current Name ID (in duplicate bill printing).

Conditional Formulas

The *Crystal Reports* formulas listed in this table are populated by Govern conditionally, on the presence of the following read-only formulas:

- @all_ar_needed_ac
- @mv_ar_needed_ac
- @pp_ar_needed
- @pp_ar_needed_ac
- @re_ar_needed
- @re_ar_needed_ac
- @td_ar_needed
- @tt_ar_needed

Formula	Action
@ar_interest_1 @ar_interest_2 @ar_interest_3 @ar_interest_4	Calculates the interest and penalties committed for the current fiscal year and the specified installment.
@current_due	Calculates the total balance due for the current fiscal year, including late charges.
@daily_interest	Calculates the daily interest and penalties.
@prior_ar_fee_1 @prior_ar_fee_2 @prior_ar_fee_3 @prior_ar_fee_4	Calculates the demands, charges and fees committed for prior fiscal years and the specified installment.
@prior_ar_interest_1 @prior_ar_interest_2 @prior_ar_interest_3 @prior_ar_interest_4	Calculates the interest and penalties committed for the prior fiscal years and for the specified installment.

Formula	Action
@prior_due	Calculates the total balance due for the prior fiscal years, including late charges.

User Text Maintenance
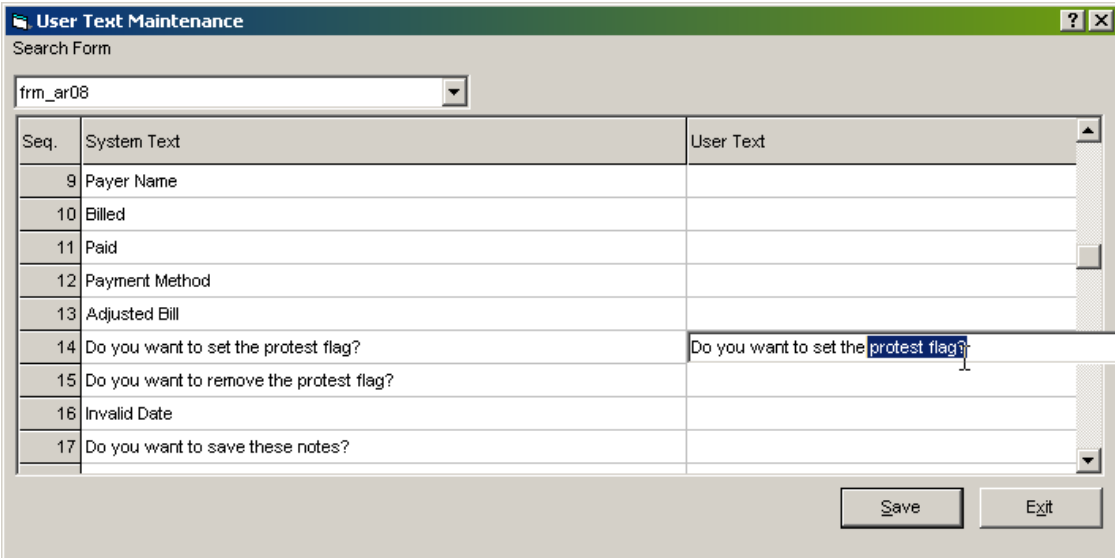
📖 Overview

With the *User Text Maintenance* form, you can modify all the text from the SY_TEXT table. This includes the entries on the Govern CoolBar, messages and labels on functions. The text is modified on the user interface but remains unchanged in the database.

To access this form, from Govern's main screen:

1. Select *Tools* > **System Administration (Govadm32.exe)**

2. In Govern Admin select *Setup* > **User text Maintenance**

To modify text:

1. Select an item from the **Select Form** drop-down list. For example, in the preceding screen shot, the *Mass Appraisal Information* function, frm_ma14 is selected.

2. Highlight the text you want to modify from the **System Text** column, on the left. The text is copied to the User Text column, on the right.

3. Modify the text, in the right column.

4. Click **Save**.

Process Flow Wizard Setup
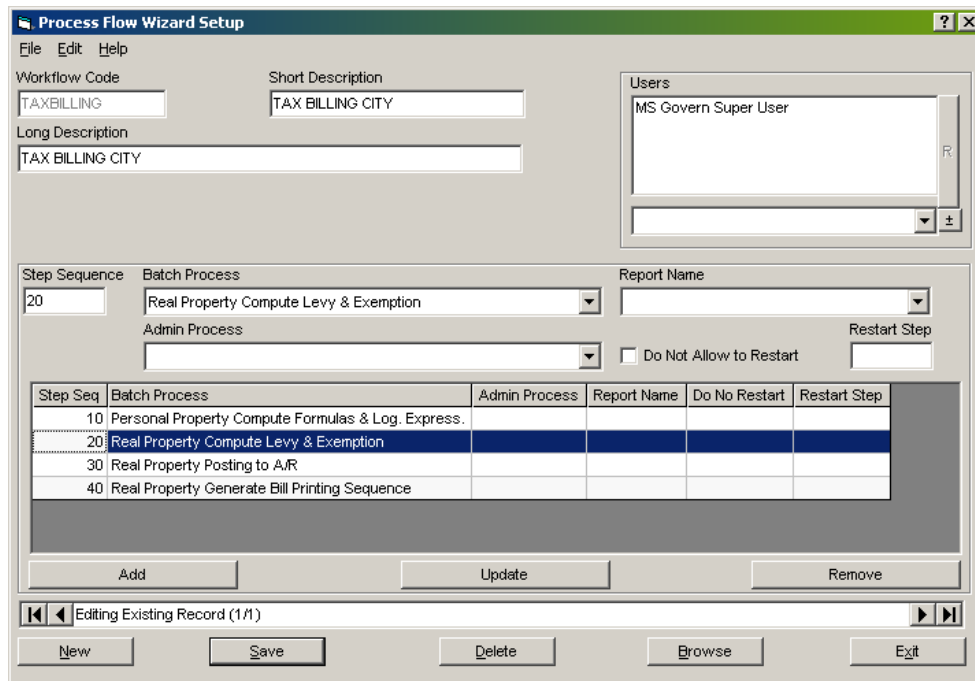
Overview

Use the *Process Flow Wizard Setup* form to define a workflow for any work process, from printing bills to completing end-of-year procedures. You can include batch processes, administrative procedures and reports. Add them to the queue in the order they need to be completed and define the users that need access permissions.

The *Process Flow Wizard* is run in *Govern Batch Processing*. This keeps track of each task, displaying the starting and completion date and times, with the name of the user and maintains an error log. *See Process Flow Wizard on page 303*, for details.

To access this form, from Govern's main screen:

1. Select *Tools* > **System Administration (Govadm32.exe)**

2. In Govern Admin select *Setup* > **Process Flow Wizard Setup**

Creating a Workflow

To create a workflow with the *Process Flow Wizard Setup*:

1. Launch Govern Admin.

2. Select **Setup** > **Process Flow Wizard Setup**.

3. Click **New** to reset the form.

4. Enter a **Workflow Code**. This is saved to VT_USR_WORKFLOW and identifies the workflow.

5. Enter a **Short Description** and **Long Description**. The Long Description is used to populate the **Workflow Description** on the *Process Flow Wizard* in Govern Batch Processing.

6. Select the users, from the **Users** drop-down list, who need to access the current workflow in Govern Batch Processing.

   Select the ± to open the **User Maintenance** form, if required.

7. Click **Save** to save the workflow to VT_USR_WORKFLOW.

Defining Steps in the Workflow

To define each step in the workflow, or each task that needs to be completed in the work process:

1. Modify the **Step Sequence**, if required. *Step Sequence Numbers* are automatically generated, in increments of ten and used to order the steps, in the queue.

2. Select the **Govern Batch Process**, **Govern Admin Process** and / or **Report Name** for the step.

> **Tip:** Enter the first letter of the item, rather than scrolling through the complete list.

3. Select **Not Allow Restart** to prevent a user from relaunching the process or regenerating the report if there are errors. You need to select this option if a previous step needs to be performed before the current step. For example, if a calculation needs to be performed before the current step can be executed.

4. Enter the step number from which the workflow needs to be restarted. For example, the step with the calculation that needs to be performed.

5. Click **Add** to add the step to the queue.

6. Repeat this procedure to complete the workflow.

7. Click **Save**.

Modifying a Step

To modify a step in the workflow:

1. Highlight the step in the grid.

2. Modify the fields as required.

3. Click **Update**.

4. Click **Save**.

Removing a Step

To remove a step from the workflow:

1. Highlight the step in the grid.

2. Click **Remove**.

3. Click **Save**.

Scanner Parameters Setup
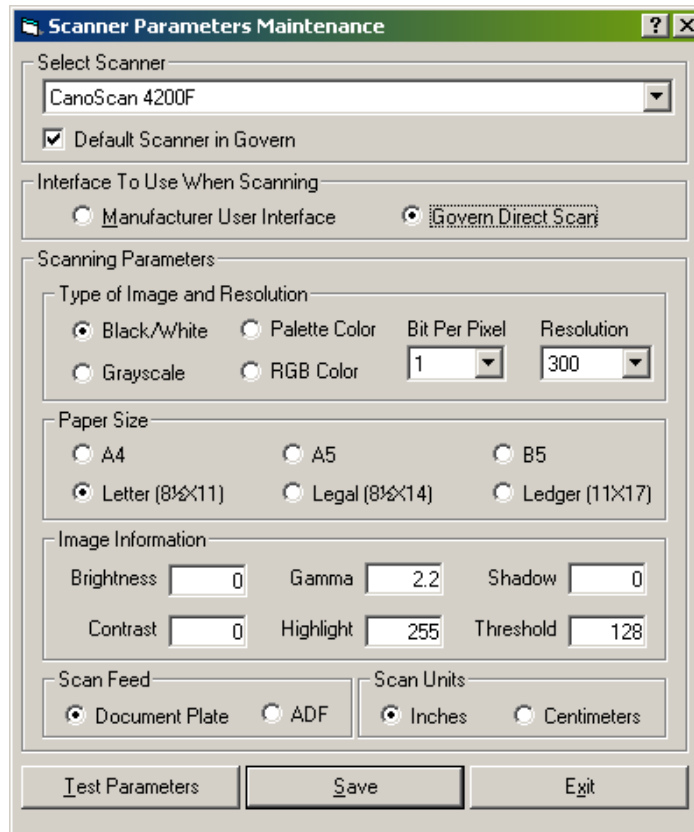
Overview

Define your scanner settings on the *Scanner Parameters Setup* form. Any TWAIN-compliant scanner can be used to copy images to disk for the *Multimedia* functions.

To access this form, from Govern's main screen:

1. Select *Tools* > **System Administration (Govadm32.exe)**

2. In Govern Admin select *Setup* > **Scanner Parameters Setup**

Scanner Parameters Maintenance Command buttons

Test Parameters: Click **Test Parameters** to test the parameters that you have selected. If a parameter is not set properly, an error message will be displayed.

Save: Click **Save** to save the current Scanner Parameters Setup in the USR_REGISTRY table.

Scanning Parameters

Select Scanner group

Select Scanner: Select a scanner from the drop-down list.

Default Scanner in Govern: When selected, this option can set the current Scanner as the default.

Interface to Use When Scanning group

Manufacturer User Interface: Select this option to default to the scanner manufacturers interface. When selected, all options in this form will be disabled.

Govern Direct Scan: If selected, this option will enable the parameters in this form. Scanning results will be based upon the settings entered in this form.

Type of Image and Resolution group

Black / White, Gray scale, Palette Color, RGB Color: Select one of the image color options.

Bits Per Pixel: Select how many Bits per Pixel you want to use for the scanner resolution. The list of items varies depending on the color option selected.

Resolution: Select the resolution that you want to use for the scanner. The list of items varies depending on the color option selected.

PAPER SIZE: Select the paper size to use when scanning. Available sizes include A4, A5, B5, Letter (81\2 x 11), (81\2 x 14), (11 x 17)

Image Information group

> **Note:** The following options will need to be configured to the requirements of the document scanner that is being used. Each parameter value will need to be verified for the sc anner from the manufacturer.

Brightness: The values entered in this field is the default Brightness. *The values required for optimum results from the selected scanner will have to be obtained by exprimentation or the manufacturer.*

Gamma: This is the default Brightness value. *The values required for optimum results from the selected scanner will have to be obtained by exprimentation or the manufacturer.*

Shadow: The Shadow field displays the default Shadow value. *The values required for optimum results from the selected scanner will have to be obtained by exprimentation or the manufacturer.*

Contrast: This is the default Contrast value. *The values required for optimum results from the selected scanner will have to be obtained by exprimentation or the manufacturer.*

Highlight: The value entered in this field is the default Highlight value. *The values required for optimum results from the selected scanner will have to be obtained by exprimentation or the manufacturer.*

Threshold: This field displays the default Threshold value. *The values required for optimum results from the selected scanner will have to be obtained by exprimentation or the manufacturer.*

Scan Feed group

Document Plate: If selected, this option directs the scanner to accept input one page at a time.

ADF: When selected, this option allows you to feed the scanner using an *Automatic Document Feeder* (**ADF**).

Scan Units group

Inches: Select this option to set the scan units to Inches.

Centimeters: If selected scanner unit will be set to centimeters.

ICVerify Setup
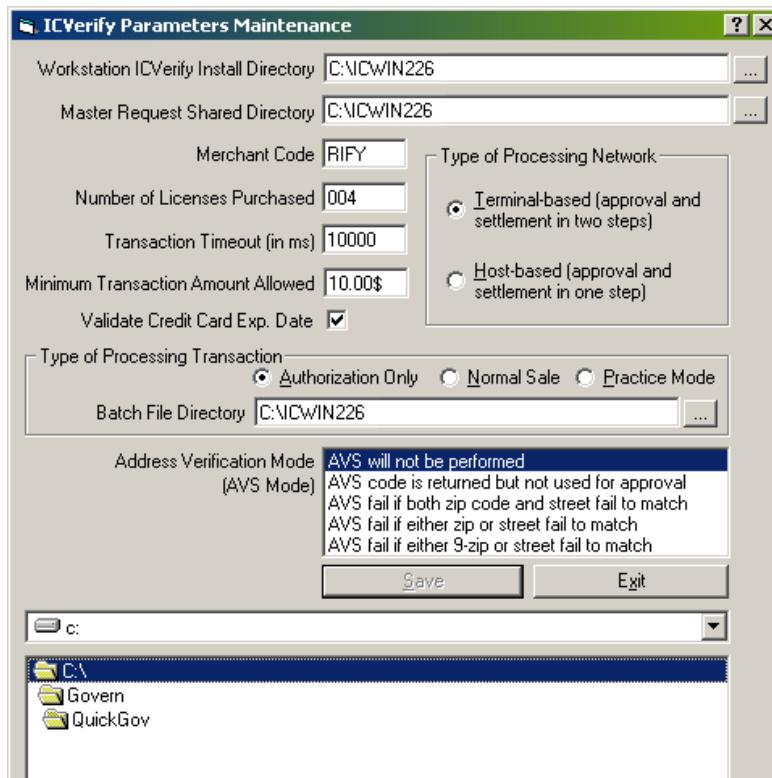
📖 Overview

Use the *ICVerify Setup* form to integrate the *ICVerify package*, for credit card transaction processing. The setup must be performed on every workstation accepting credit cards. This is used to verify security options for this type of transaction.

To access this form, from Govern's main screen:

1. Select *Tools* > **System Administration (Govadm32.exe)**

2. In Govern Admin select *Setup* > **IC Verify Setup**

Saving the ICVerify Parameters Setup: Click **Save** to save the parameters setup for the current workstation.

Workstation ICVerify Install Directory: Enter the path of the ICVerify installation directory. You can also click the ⬚ button. This action opens a screen displaying a tree of the current working drive to help you to find the install directory. If the path is incorrect, or if the system cannot find any application installed, then a warning message is displayed.

Master Request Shared Directory: Enter the path of the ICVerify master workstation shared directory that will receive the file used to send the requests for transaction approvals. To find the directory path, you can also click the ⬚ button to find the install directory.

Merchant Code: Enter the Merchant Code. It corresponds to the four last characters of the setup file name of the merchant (that the transaction is being processed for). For example, if you use the default *ICVERIFY.SET*, this property should then be set to *RIFY*.

Number of Licenses Purchased: Enter the exact number of ICVerify licenses purchased.

Transaction Time-out (in ms): This is the length of time in milliseconds that a transaction will wait for a license to process before it times out. The default value is 10000.

Minimum Transaction Amount Allowed: Enter the minimum transaction amount allowed. This value cannot be less than one.

Validate Credit Card Exp. Date: If this option is selected, the card expiration date is checked automatically by the system. If it is not valid, the process will not be completed. If it is not checked off, validation will not be performed by the system.

Type of Processing Transaction

If you select, **Authorization Only,** you **must** enter a *Batch File Directory*. This file will store the pre-authorized transactions until the settlement process has been completed. In this mode, the system will prompt for an approval number when entering a credit card payment.

Authorization Only: If selected, you must enter a *Batch File Directory*. This file will store the pre-authorized transactions until the settlement process has been completed. In this mode, the system will prompt for an approval number

when entering a credit card payment. This is to allow balancing A/R by *Cashier*, *Operator*, *Deposit Number* or *Date* in the *Batch Process*.

Normal Sale: If selected, this option will tell *ICVerify* to process the transaction as a normal sale and settlement will occur as the option selected in the **Type of Processing Network** section.

Practice Mode: If selected, this option allows the User to test the function. The value returned will be 99999.

Type of Processing Network

Terminal-based: If selected, it indicates to *Govern* that you are using a processing network that will proceed in two steps: the approval followed by the settlement.

Host-based: If selected, it indicates to *Govern* that you are using a processing network that will proceed in one step: *Approval & Settlement*.

Address Verification Mode (AVS Mode): Select one of the *AVS* modes. The most complicated mode appears at the top of the list with the list at the bottom. The merchant-processing fee is usually less for the less complicated modes.

Navigate to a directory for the batch file. To return to the parameter setup click <-- .

![MSGovern logo]
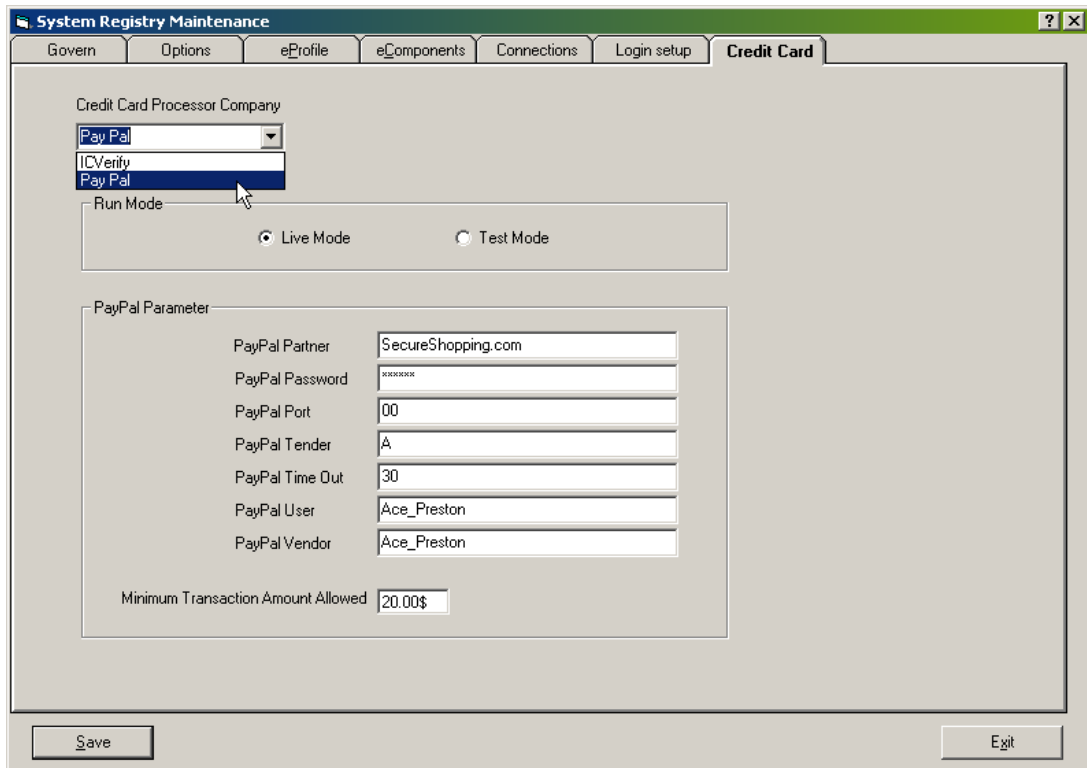
PayPal Configuration

📖 Overview

PayPal is an online payment transaction service that also offers credit card payment settlement services. With Govern version 10.0 PayPal was offered as an option for credit card transactions. Previously the only option available for processing credit card payments was ICVerify.

PayPal Parameters

Run Mode group

Live Mode: Select this option to run in a live environment.

Test Mode: Select this option to run in test mode.

PayPal Parameter group

> **Note:** All PayPal configuration parameters will be provided by your PayPal partner.

PayPal Partner: Enter you PayPal partner name.

PayPal Password: Enter your password.

PayPal Port: Specify the port that PayPal will use.

PayPal Tender: Enter a method of payment:

- **A** - ACH (Automated Clearing House)
- **C** - Credit Card
- **D** - Pinless Debit
- **E** - Electronic Check
- **K** - Telecheck
- **P** - PayPal

PayPal Time Out: Specify a time-out value in seconds; a value of 30 - 300 secs is the usual.

PayPal User: Enter the name of the PayPal user.

PayPal Vendor: Enter the PayPal vendor.
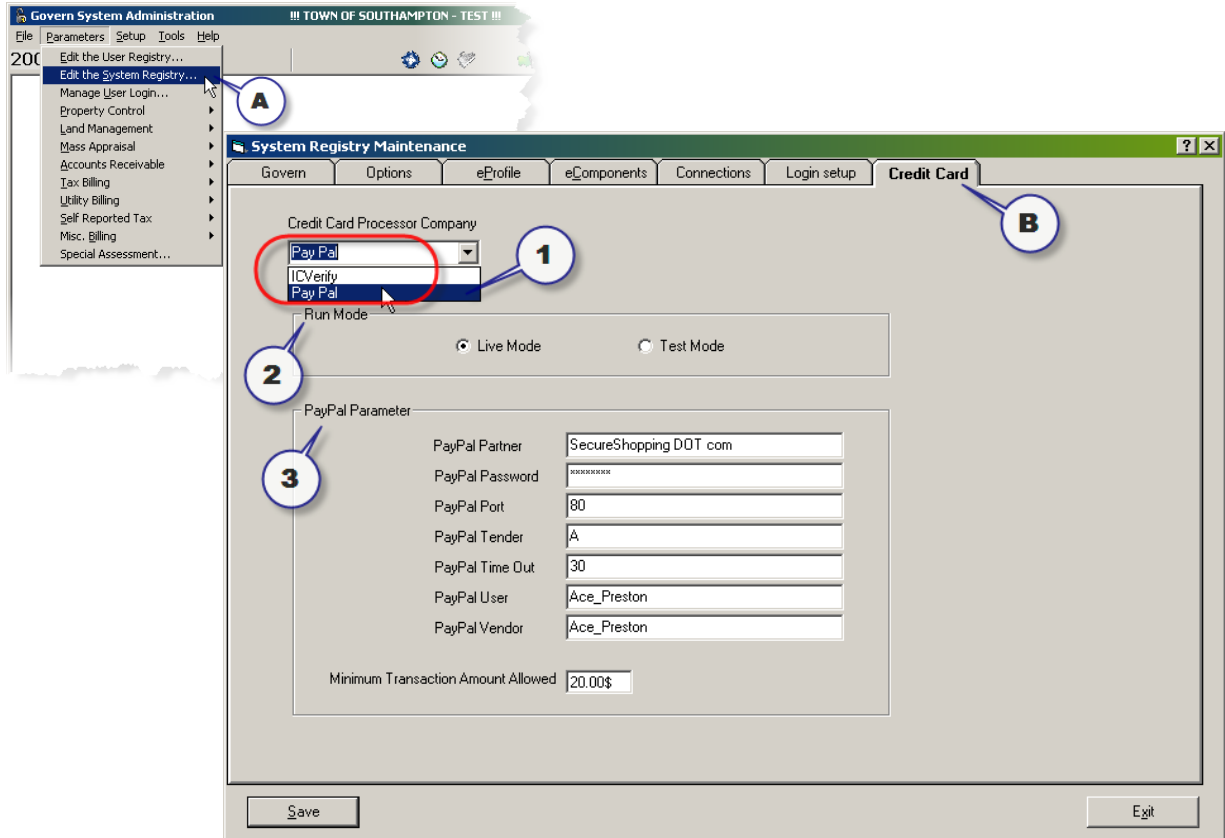
Minimum Transaction Amount Allowed: Enter the minimum amount that is allowed for a transaction.

To configure for PayPal transactions, in *Govern Admin*:

> **Note:** The following setup must be performed on every workstation accepting credit cards.

1. Select *Parameters* > **System Registry Maintenance.**
2. Click on the **Credit Card** tab.
3. On the *Credit Card Processor Company* drop-down menu option, select **Pay Pal** as the option.

4. Enter the required parameters.

FINAL DRAFT

Barcode Setup for OCR and PostNet Billing

📖 Overview

Previously, modifications to barcode fonts required special assistance for configuration. The parameters that were required to be set were not readily accessible to users. With this option, configuration of Barcode, OCR, and PostNet fonts, and dimensions, is accessible to users with administrator-level access.

Using the Bill Fonts group, *OCR / PostNet* barcodes can be generated and included in Govern generated reports such as tax bills, invoices, etc.

Bill Fonts and Crystal Reports
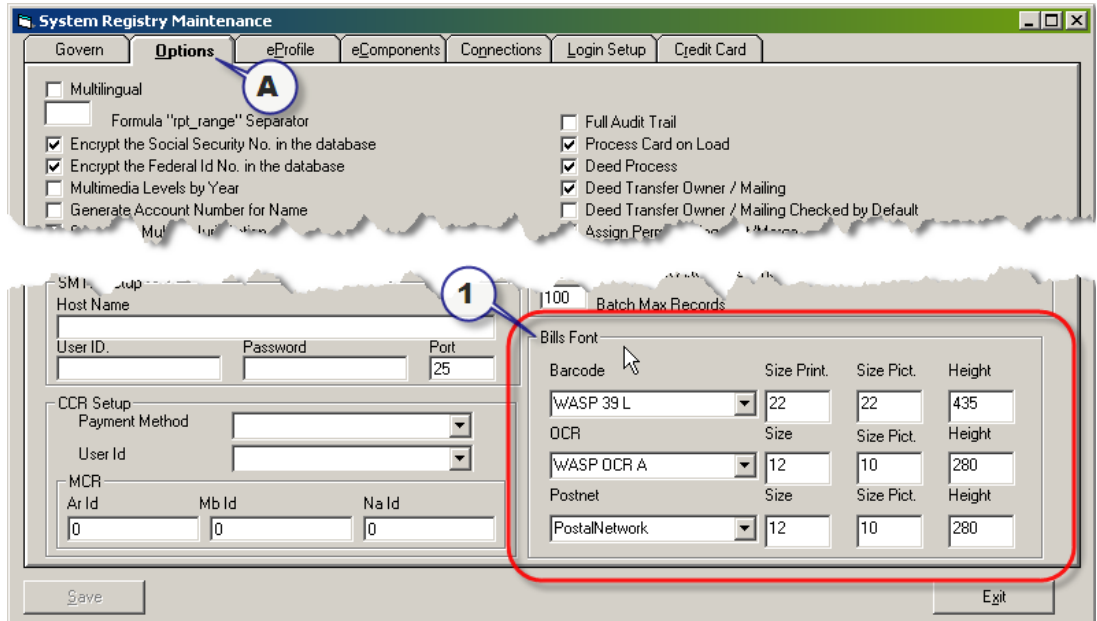
The configuration of *Bill Fonts* options does not apply to Crystal Reports. Crystal reports are self contained, i.e. their fonts are embedded within the report itself, and therefore external to Govern's control.

To configure Bill Fonts in *Govern Admin*...

1. Select *Parameters* > **System Registry Maintenance**.

2. In the *System Registry Maintenance* form, select the **Options** tab.

3. Look for the *Bill Fonts* group.

The additional parameters that are required for the configuration, i.e. *Barcode*, *Print Size*, *Pict Size*, and *Height* are set based upon each user individual requirements.

Note: Barcodes and barcode readers are specialized in that users cannot use any barcode font. Refer to the information supplied with your reader or scanning system, to find out what fonts are compatible with your system.
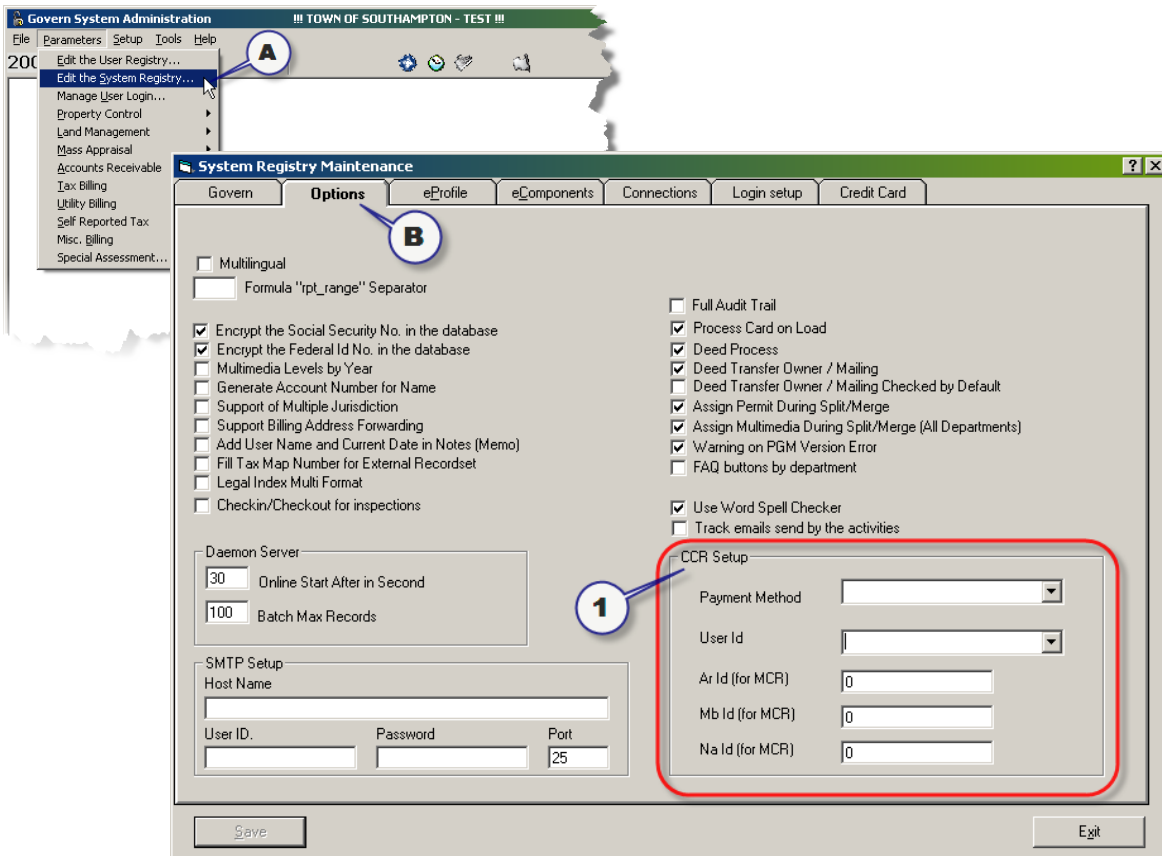
CCR Setup

MS Govern's Centralized Cash Receipting (**CCR**) Module is a web based transaction system that integrates to the *Govern System. Govern's* **CCR** module provides centralized cash collection on any cash receipt, including utility, building permits, property taxes and accounts receivables. Transactions made through *CCR* are sent to *Govern* via *web services*, and stored as a transaction in *Govern's* A/R table.

In order for *Govern* to be able to store a *CCR* transaction, it is necessary to include additional information that is not provided by CCR. This appending procedure ensures that *CCR* data will conform with *Govern's* database structure. Required settings are defined in the *CCR Setup* group in *Govern Admin*.

To configure *CCR* in *Govern Admin*:

1. Select *Parameters* > **Edit the System Registry...**

2. In the System Registry Maintenance form, look for the *CCR Setup* group.

3. Configure the parameters as required.

For details on CCR Setup parameters, *see CCR Setup group on page 41*.

External Application Setup
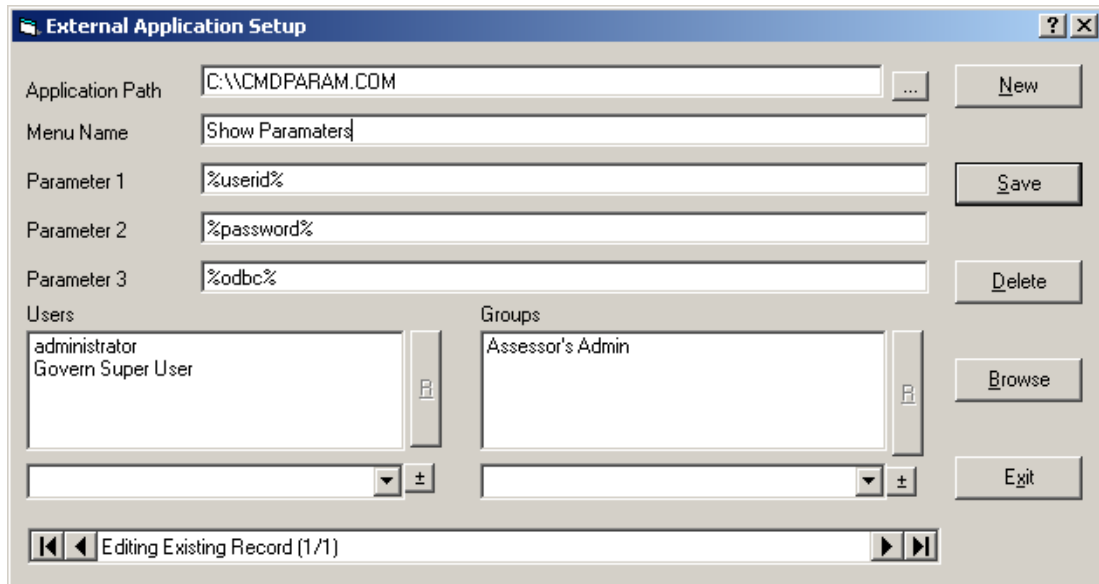
📖 Overview

Launch an external application directly from Govern, after setting it up through the *External Application Setup* form. You can enter parameters, such as user ID and password or directory path in order to open the application directly. You can also enter the ODBC connection. The application name is added to the **Tools** menu in Govern.

You can create a command button for the application and launch it directly from a Govern function. *See New Command Buttons on page 257, for details.*

To access this form, from Govern's main screen:

1. Select **Tools** > **System Administration (Govadm32.exe)**

2. In Govern Admin select **Setup** > **External Application Setup**

External Application Setup Parameters

Application Path: Enter the path to the application you are linking.

Selecting an Application Path: Click ▣ to open the selection screen. Then, navigate to the drive and directory where the application you are linking is located.
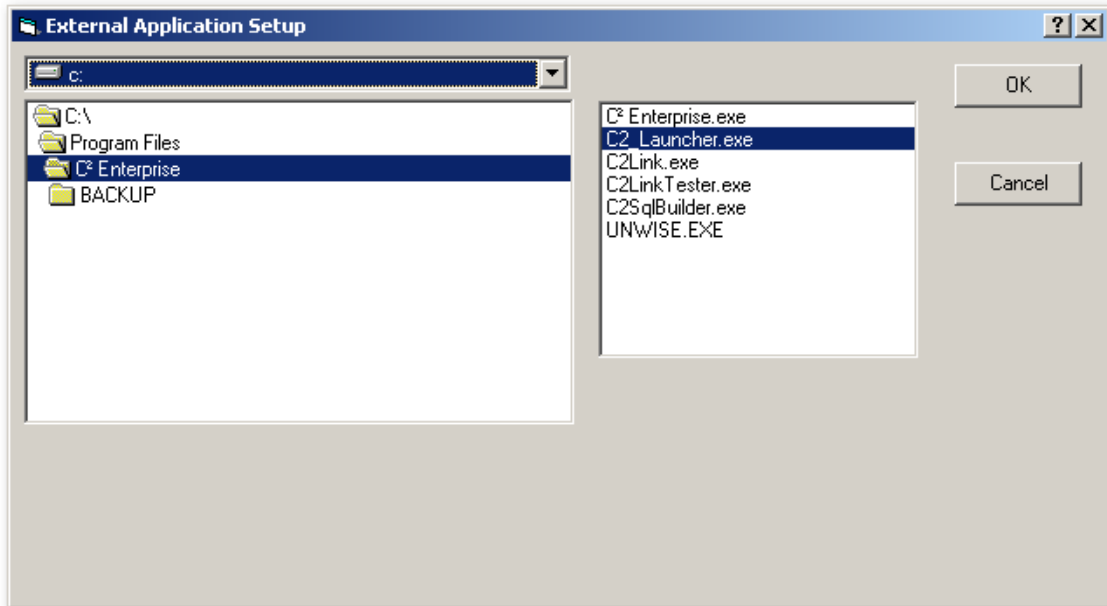
Selecting an External Application: Select the drive and directories where the application is located. Then, select the application from the list box on the right and click **OK**.

Menu Name: Enter a name to identify the external application you are linking. This will appear on the **Tools** menu in Govern.

Parameters 1, 2 and 3: Enter application parameters in these three fields. For example, you could set the keywords: %USERID%, for the *current* user name and %PASSWORD%, for the *current* password as parameters.

Note: You can enter more than one parameter per line. Separate each with a space.When you enter information on each line separately for Parameters 1, 2, and 3, the system automatically inserts a space.

You can also set the ODBC connection in order to connect directly to the Govern database from the external application. To set the ODBC connection enter %ODBC%.

> The system replaces the semi-colon (;) in the connection string with a caret (^) and replaces the space with an at-sign (@); for example, the following string
> ODBC;DSN=nfr75sp1;DATABASE=NFR75SP1;DBQ=NFR75SP1;UID=montreal ;USER ID= montre al;PWD=montreal
> is replaced by:
> ODBC^DSN=nfr75sp1^DATABASE=NFR75SP1^DBQ=NFR75SP1^UID=montre al^USER@ID= montr eal^PWD=montreal
> The external application needs to reconvert these characters to the original semi-colon and space.

You can also enter any keyword from the validation table VT_SY_BRULE as a parameter; for example, enter the tax map number, parcel identification and name identification in order to open the application to a specific record:

The following table lists the available keywords.

Code	Keyword	Description
*date	current date	Current Date
ac_id	aircraft id	Unique identification number of the current *Aircraft Excise Tax* record

Code	Keyword	Description
bldg_id	building id	Unique identification number of the current building
bldg_seq	building sequence	Unique identification *Sequence Number* of the current building
bt_id	boat id	Identification number of the current *Boat Excise Tax* account
co_id	complaint id	Unique identification number of the current *Complaint*, *Grievance*, *Request of Services* or *Workflow* record
dept	department	Department Code
frozen_id	frozen id	Unique identification number of the current *Frozen* record
in_id	inspection id	Unique identification number of the current inspection
land_id	land id	Unique identification number of the current land
misc_id	miscellaneous id	Identification number of the current *Miscellaneous Billing* account
mv_id	motor vehicle id	Identification number of the current Motor Vehicle Account
na_id	name id	Unique identification number of the current Name
of_id	offence id	Unique identification number of the current *Offense* record
p_id	parcel id	Unique identification number of the current parcel
pm_id	permit id	Unique identification number of the current *Building Permit*, *Electrical Permit*, *General Permit*, *Plumbing Permit*, *Permit to Name*, *Animal License*, *Business License*, *License to Name*, *Approval*, *Bond*, *Decision*, *Prosecution* or *Appeal* record
pp_det_id	pp detail id	Unique identification number of the current *Personal Property Item*

Code	Keyword	Description
pp_id	personal property id	Identification number of the current *Personal Property* account
tax_map	tax map no	Tax Map Number of the current record
ub_id	utility billing id	Unique identification number of the current *Utility Billing* account
usr_id	user id	Unique identification number of the current user
year_id	year id	Year identification of the current record

Users: Select the users who will have access to the external application, from the drop-down list. Click ⊥ to open the *User Maintenance* form. *See User Maintenance on page 60*.

Groups: Select the groups that will have access to the external application, from the drop-down list. Click ⊥ to open the *Group Validation* form. *See Creating a Group on page 75, for details*.

Note: Leave the **Users** and / or **Groups** fields blank to grant access to all.

External Application Setup Command Buttons

Creating a New External Application Setup Record: Click **New** to clear the form.

Saving an External Application Setup Record: Click **Save** to save a new External Application Setup record or any modifications to an existing one (Table: USR_EXT_AP).

Deleting an External Application Setup Record: Click **Delete** to remove the current record from the database.

Browsing External Application Setup Records: Click **Browse** to view a list of the existing External Application Setup records.

Formula Editor
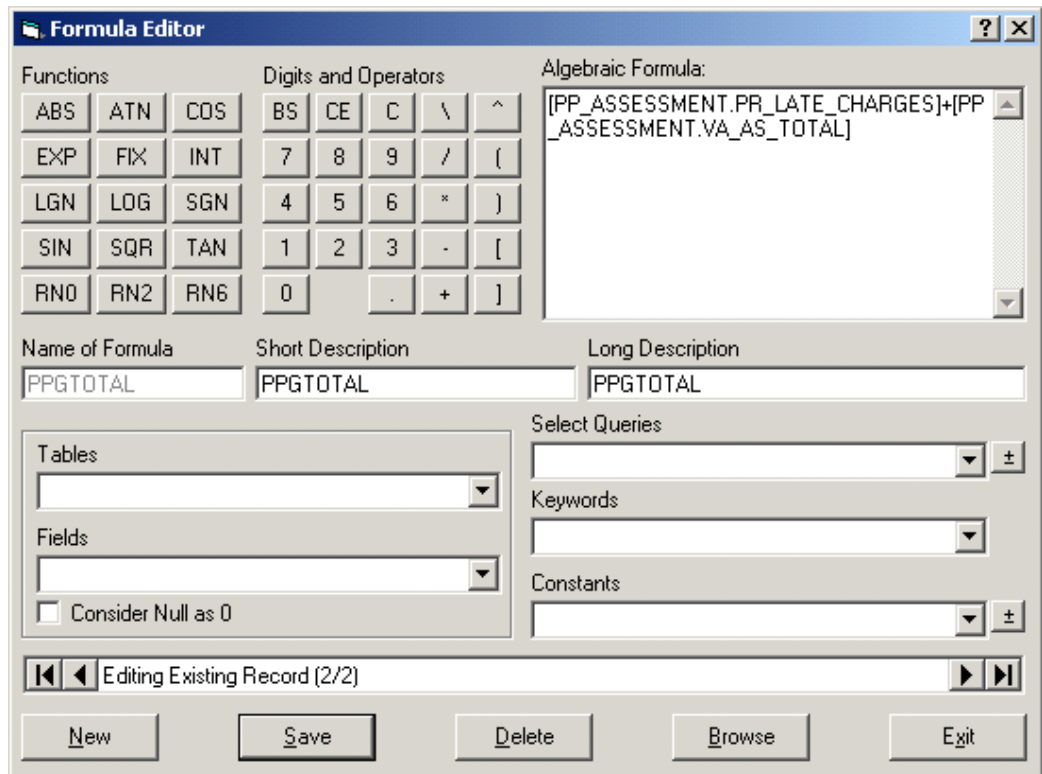
📖 Overview

Create customized formulas, using the *Formula Editor* form. Formulas can be used in Mass Appraisal calculations, permit fee calculations, added to a logical expression, created through the *Logical Expression Block Editor* and added to a customized database field or linked to any field, whether created by Govern or user-defined.

To access this form, from Govern's main screen:

1. Select **Tools** > **System Administration (Govadm32.exe)**

2. In Govern Admin select **Setup** > **Formula Editor**

Formula Editor Command Buttons

Creating a New Formula: Click **New** to clear the form so that you can enter new data.

Saving a Formula: Click **Save** to save a new record or any modifications to an existing one. Formulas are saved to VT_USR_FORMULA.

Deleting a Formula: Click **Delete** to remove the current record from the database.

Browsing Formula Records: Click **Browse** to view a list of the existing formulas.

Formula Editor Fields

Functions: The following functions can be used to create formulas:

ABS	Absolute Value Function	ATN	Arc Tangent Function	COS	Cosine Function
EXP	Exponential of e Function (e= 2.718282)	FIX	Integer part of a number (not rounded)	INT	Integer part of a number (rounded)
LGN	Natural Logarithm Function	LOG	Base 10 Logarithm Function	SGN	Sign Function (results to 1 or –1)
SIN	Sinus Function	SQR	Square Root Function	TAN	Tangent Function
RN0	Rounded to 0 decimal places	RN2	Rounded to 2 decimal places	RN6	Rounded to 6 decimal places

Digits and Operators: The following digits and operators can be used:

BS	Back Space	CE	Clears Last Entry	C	Clears the Algebraic Formula Text box
7	Inserts the Digit 7	8	Inserts the Digit 8	9	Inserts the Digit 9

4	Inserts the Digit 4	5	Inserts the Digit 5	6	Inserts the Digit 6
1	Inserts the Digit 1	2	Inserts the Digit 2	3	Inserts the Digit 3
0	Inserts a zero			.	Inserts a decimal point

\	Integer Division Operator	/	Division Operator	×	Multiplication Operator
-	Subtraction Operator	+	Addition Operator	^	Exponential Operator
(	Insert an Opening Parenthesis	)	Insert a Closing Parenthesis		
[	Insert an Opening Bracket The Brackets are used for enclosing database tables and fields.	]	Insert a Closing Bracket		

Note: These definitions are displayed, as a tool tip, when you run the mouse over the button.

Algebraic Formula: The Algebraic formula is created as the information is entered. This formula can also be modified in this space.

Name of Formula: Enter a name for the new formula.

Short Description: Enter a short description for the formula.

Long Description: Enter a long description for the formula.

Adding Database Fields, Queries, Keywords and Constants

To include a value from a database field, query, keyword or constant, in a formula, select the item from the drop-down list. You can include as many of these values as needed, by making multiple selections. The item is added where the cursor is placed in the **Algebraic Formula** edit box. For example, you could retrieve two values from the database, using *Selection Queries*, and add these values together.

The following restriction applies:

All fields, selected from the **Fields** list, must be associated with the same function.

You can also create a new query or constant, from the *Formula Editor* by clicking the ± beside the drop-down list, for the item.

Tables: To include a database field in a formula, you need to select the table first, from the **Tables** drop-down list.

Fields: After selecting the table, select the field from the **Fields** drop-down list. The value of this field for the current record is included in the formula. These selected table and field are displayed in uppercase, between square brackets; for example, [AC_ EXEMPTIONS.FROZEN_ID].

Consider Null as 0: Select this option to consider Null as 0 during the calculation process. Null represents the absence of a value and normally if one operand within the formula is Null, the result of the formula is Null. When this option is selected, Null is recognized as 0 and the formula returns a numeric value.

Select Queries: You can include one or more queries in a formula. These queries must be *Selection* queries; i.e., used to retrieve data from one or more fields.

For example, in the following formula:

{depr_year}-[MA_BUILDINGS.EYB]

The **Effective Year Built** (EYB) of the current building record is subtracted from the Depreciation Year, the year used in calculating the depreciation (depr_year).

The *Depreciation Year* query {depr_year} retrieves the depreciation year from the SY_REGISTRY table, by specifying values for the SECTION_ NAME and KEY_NAME fields:

Select KEY_VALUE From SY_REGISTRY Where SECTION_NAME=str(Year Id,4) and KEY_NAME='depreciation year'

The queries need to be defined through the *User-Defined Queries Setup* form. To include a query, select it from the list. The query name is displayed in the **Algebraic Formula** edit box between braces, { }. To create a new query, click

 . *See SQL Queries on page 211 for more information.*

Keywords: Select a keyword from the drop-down list to include it in the formula. Keywords are used to retrieve a value currently in memory; such as ~ parcel id ~ to retrieve the parcel id of the current record. Keywords are displayed in lowercase, between tildes, ~ ~.

For example, to include the building sequence for the current building record, in the formula, select the **~building sequence~** keyword.

The following table lists the available keywords for the formulas.

Code	Keyword	Description
*date	current date	Current Date
ac_id	aircraft id	Identification number of the current *Aircraft Excise Tax* record
ar_id	accounts receivable id	Identification number of the current *Account Receivable* record
bldg_id	building id	Identification number of the current building
bldg_seq	building sequence	Identification *Sequence Number* of the current building

Code	Keyword	Description
br_id	bankruptcy id	Identification number of the current *Bankruptcy* record
bt_id	boat id	Identification number of the current *Boat Excise Tax* account
cc_id	cash collection id	Identification number of the current *Cash Collection* record
co_id	complaint id	Identification number of the current *Complaint*, *Grievance*, *Request of Services* or *Workflow* record
dept	department	Department Code
folio_id	project folio id	Identification number of the current *Project Folio* record
frozen_id	frozen id	Identification number of the current *Frozen* record
h_id	hearing id	Identification number of the current *Hearing* record
haz_id	hazard id	Identification number of the current *Hazard* record
in_id	inspection id	Identification number of the current inspection
key_counter	activity id	Identification number of the current *Activity* record
land_id	land id	Identification number of the current land
mb_id	misc. billing id	Identification number of the current *Miscellaneous Billing* record
misc_id	miscellaneous id	Identification number of the current *Miscellaneous Billing* account
mv_id	motor vehicle id	Identification number of the current Motor Vehicle Account
na_id	name id	Identification number of the current Name
of_id	offence id	Identification number of the current *Offense* record

Code	Keyword	Description
p_id	parcel id	Identification number of the current parcel
pm_id	permit id	Identification number of the current *Building Permit*, *Electrical Permit*, *General Permit*, *Plumbing Permit*, *Permit to Name*, *Animal License*, *Business License*, *License to Name*, *Approval*, *Bond*, *Decision*, *Prosecution* or *Appeal* record
pp_det_id	pp detail id	Identification number of the current *Personal Property Item*
pp_id	personal property id	Identification number of the current *Personal Property* account
prj_id	project id	Identification number of the current *Project* record
sa_id	special assessment id	Identification number of the current *Special Assessment* record
sale_id	sale id	Identification number of the current *Sale* record
si_id	site id	Identification number of the current *Site* record
st_acct_id	self reported tax account id	Identification number of the current *Self Reported Tax Account* record
st_id	self reported tax id	Identification number of the current *Self Reported Tax* record
tax_map	tax map no	Tax Map Number of the current record
ub_id	utility billing id	Identification number of the current *Utility Billing* account
usr_id	user id	Identification number of the current user
year_id	year id	Year identification of the current record

Constants: Select a constant from the drop-down list, to include it in the formula or click ± to create a new constant. Constants are displayed between

ampersands (& &). See *Constant Value Editor on page 208* for more information.

Executing Formulas and Logical Expressions

Note: When formulas and logical expressions that include keywords or database columns, are executed, all the applicable functions need to be open.

Alternately, you can add a *Selection Query* to the formula or logical expression, in order to retrieve values from database fields. *SeeSelection Queries on page 216*.

Logical Expression Block Editor
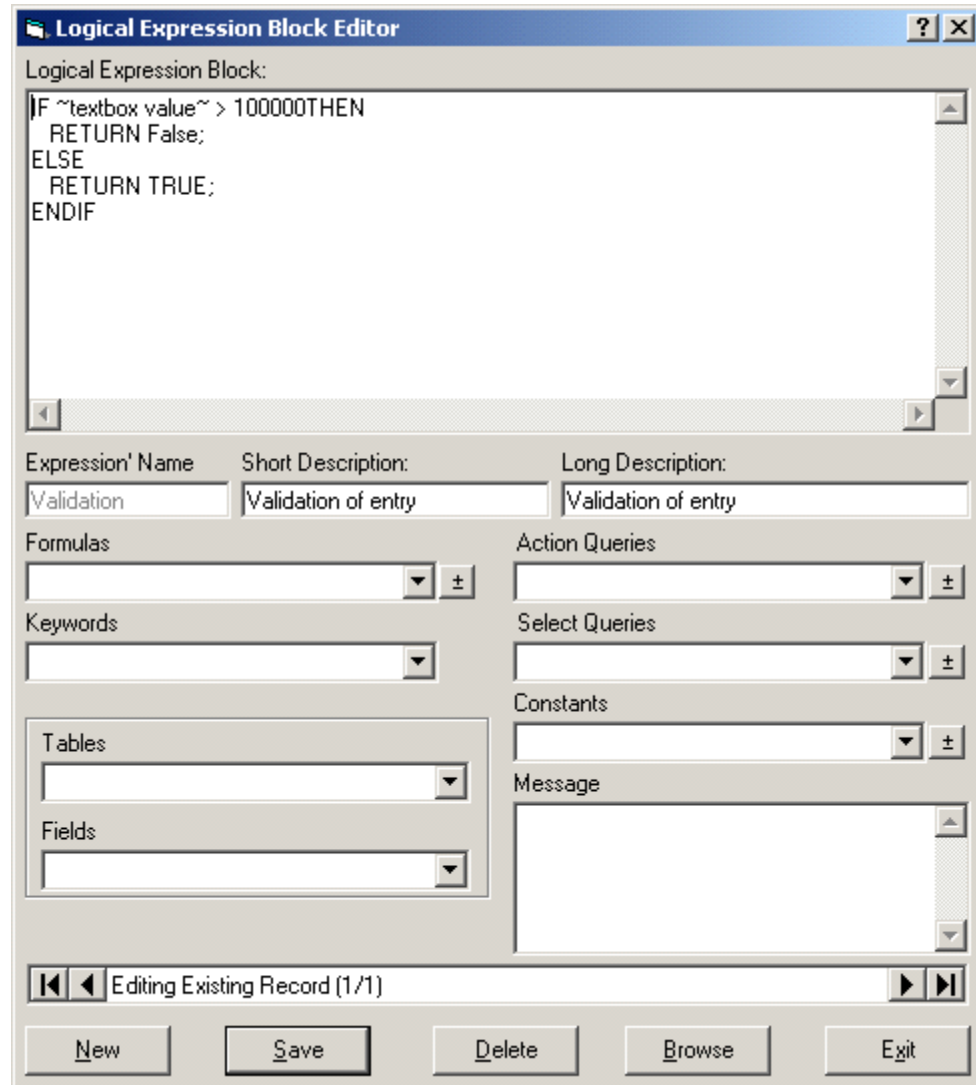
📖 Overview

Create customized logical expressions, using the *Logical Expression Block Editor* form. Logical expressions can be used in Mass Appraisal calculations, permit fee calculations and linked to any field, whether it is created by Govern or user-defined.

To access this form, from Govern's main screen:

1. Select **Tools** > **System Administration (Govadm32.exe)**

2. In Govern Admin select **Setup** > **Logical Expression Editor**

You can include a *Temporary Field*, in your logical expressions. This can hold any value, for example, one generated from a query, a database field or from user input. *See Using a Temporary Field on page 206*.

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Logical Expression Block Editor Command Buttons

Creating a Logical Expression: Click **New** to clear the form so that you can create a new logical expression.

Saving a Logical Expression: Click **Save** to save a new Logical Expression or any modifications to an existing one. Logical expressions are saved to VT_USR_LOGEXP.

Deleting a Logical Expression Record: Click **Delete** to remove the current record from the database.

Browsing Logical Expression Records: Click **Browse** to view a list of the existing Logical Expressions.

Logical Expression Block Editor Parameters

Logical Expression Block: Compose your logical expressions in this edit box. There is no limit to the number of statements you can add.

The following operators can used:

Operator	Definition
=	Equal to
>	Greater than
<	Less than
<>	Different from
<=	Less than or Equal to
>=	Greater than or Equal to
IN	Value represented by the first expression as present in the second
AND	(xxxx) AND (xxxx)
OR	(xxxx) OR (xxxx)

Expression Name: Enter a name or code for the logical expression.

Short Description: Enter a short description. This is used for fast data entry and look-ups if space is limited on forms.

Long Description: Enter a long description. This is displayed during look-ups and on forms and reports.

Building Logical Expressions

You can compose your logical expressions in the **Logical Expression Block** edit box or copy and paste one from another file. Your logical expression can comprise an unlimited number of statements, constants, formulas, keywords, queries, database fields, numeric values and strings.

Statements

The logical expression can be built from the following types of statements: IF... THEN... ELSE, DO, RETURN and IN.

IF… THEN… ELSE…

This type of statement executes a group of statements, conditionally, depending on the value of the logical expression.

The following rules apply:

1. IF, THEN and ELSE must be written in uppercase.

2. A space must be entered between the statement and the action.

3. Only **Select Queries** can be used with the **IF** statement. *For more information on queries, see SQL Queries on page 211.*

The syntax is as follows:

```
IF condition THEN
statement
ELSEIF elseifcondition THEN
elseifstatement
ELSE elsestatement
ENDIF
```

DO

This type of statement executes an action.

The following rules apply:

1. DO must be written in uppercase.

2. A space must be entered between the statement and the action.

3. It must be followed by an action.

4. The action must be followed by a ; (semi-colon).

5. Only *Action* Queries can be used with the DO statement. *For more information on queries, see SQL Queries on page 211.*

The syntax is as follows:

```
IF condition THEN
DO action;
ELSEIF elseifcondition THEN
DO action;
ELSE
DO action;
ENDIF
```

RETURN

This type of statement returns a value.

1. RETURN must be written in uppercase.

2. A space must be entered between the statement and the action.

3. The action must be followed by a ; (semi-colon).

The syntax is as follows:

```
IF condition THEN
RETURN value;
ELSEIF elseifcondition THEN
RETURN value;
ELSE
RETURN value;
ENDIF
```

You can enter any of the following, after the **RETURN**:

- **Select Query**: from the **Select Queries** drop down list. The query name must be entered between braces, { }
- **Formula**: from the **Formulas** drop down list. A formula must be entered between bar delimiters, | |.
- **String**: 'text'. A string is entered between single quotation marks, ' '.
- **Date**: #2004#
- **Value**: 999
- **Keyword**: from the **Keywords** drop down list. A keyword must be placed between tildes, ~ ~.

- **TRUE**: in uppercase
- **FALSE**: in uppercase
- A database field name must be entered, with the table, between square brackets, [TABLE.FIELD].

IN Statement

The following rules apply to the **IN Statement**:

1. An item list separated with a comma (,) must be placed after the IN operator.

2. The item list must be delimited with quotation marks (")

3. The item list must contain at least two items.

4. The items in the list must be of the same type; i.e., numeric or string OR

   If the list contains items of different types, the items must be delimited with single quotation marks:

Statement	Correct / Incorrect	
IN "A,B,C,D"	✓	**Correct**
IN "10,20,30,40"	✓	**Correct**
IN"10,A,B,C"	✗	**Incorrect**
IN"'10','A','C','D'"	✓	**Correct**
INA,B,C,D	✗	**Incorrect**
IN"A"	✗	**Incorrect**
IN "A,B"	✓	**Correct**

Logical Expression Comparison Operators

Operator	Description	How to use…	
=	Is the value represented by the first expression is equal to the value represented by the second?	0 = 0 → True 0 = 1 → False	A = A → True A = B → False

Operator	Description	How to use…	
<>	Is the value represented by the first expression not equal to the value represented by the second?	0 **<>** 1 → True 0 **<>** 0 → False	A **<>** B → True A **<>** A → False
>	Is the value represented by the first expression greater than the value represented by the second?	1 **>** 0 → True 2 **>** 2 → False 1 **>** 3 → False	
>=	Is the value represented by the first expression less than or equal to the value represented by the second?	1 **>=** 0 → True 2 **>=** 2 → True 1 **>=** 3 → False	
<	Is the value represented by the first expression less than the value represented by the second?	0 **<** 1 → True 2 **<** 2 → False 3 **<** 1 → False	
<=	Is the value represented by the first expression greater than or equal to the value represented by the second?	0 **<=** 1 → True 2 **<=** 2 → True 3 **<=** 1 → False	
IN	Is the value represented by the first expression found in the second?	1 **IN** "1,2,3,4,5" → TrueA **IN** "A,B,C,D,E" → True 9 **IN** "1,2,3,4,5" → FalseZ **IN** "A,B,C,D,E" → False	

Logical Operators

Operator	Description	How to use…

AND	The **And** operator performs logical conjunction on two **Boolean** expressions. That is, if both expressions evaluate to **True**, then the **And** operator returns **True**. If either or both expressions evaluate to **False**, then **And** returns **False**.	True **AND** True → True True **AND** False → False False **AND** True → False False **AND** False → False
OR	The **Or** operator performs logical disjunction on two **Boolean** expressions. If either expression evaluates to **True**, **Or** returns **True**. If neither expression evaluates to **True**, **Or** returns **False**.	True **OR** True → True True **OR** False → True False **OR** True → True False **OR** False → False

Expression Names

RETURN_MAX_1

The **RETURN_MAX_1** expression will compare two (2) values, and return the greater, i.e. the maximum, of the two.

Syntax for the use of the **RETURN_MAX_1** expression is as follows:

```
IF (ATTRIB_1 >= PARAM_1) THEN
 RETURN ATTRIB_1;
ELSE
   RETURN PARAM_1;
ENDIF
```

Where...
ATTRIB_1 is the value that is entered by the user.
PARAM_1 is the value of the parameter.

RETURN_MAX_2

The **RETURN_MAX_2** expression will compare three (3) values, and return the greater, i.e. the maximum, of the three.

Syntax for the use of the **RETURN_MAX_2** expression is as follows:

```
IF (ATTRIB_1 >= PARAM_1) AND (ATTRIB_1 >= PARAM_2) THEN
   RETURN ATTRIB_1;
ELSEIF (PARAM_1 >= ATTRIB_1) AND (PARAM_1 >= PARAM_2) THEN
   RETURN PARAM_1;
ELSE
   RETURN PARAM_2;
ENDIF
```

Where...
ATTRIB_1 is the value that is entered by the user.
PARAM_1, and **PARAM_2** are the values of the parameters.

RETURN_MAX_3

The **RETURN_MAX_3** expression will compare four (4) values, and return the greater, i.e. the maximum, of the four.

Syntax for the use of the **RETURN_MAX_3** expression is as follows:

```
IF (ATTRIB_1 >= PARAM_1) AND (ATTRIB_1 >= PARAM_2) AND
(ATTRIB_1 >= PARAM_3) THEN
   RETURN ATTRIB_1;
ELSEIF (PARAM_1 >= ATTRIB_1) AND (PARAM_1 >= PARAM_2) AND
(PARAM_1 >= PARAM_3) THEN
   RETURN PARAM_1;
ELSEIF (PARAM_2 >= ATTRIB_1) AND (PARAM_2 >= PARAM_1) AND
(PARAM_2 >= PARAM_3) THEN
   RETURN PARAM_2;
ELSE
   RETURN PARAM_3;
ENDIF
```

Where...
ATTRIB_1 is the value that is entered by the user.
PARAM_1, **PARAM_2** and **PARAM_3** are the values of the parameters.

RETURN_MIN_1

The **RETURN_MIN_1** expression will compare two (2) values, and return the lowest, i.e. the minimum, of the two.

Syntax for the use of the **RETURN_MIN_1** expression is as follows:

```
IF (ATTRIB_1 <= PARAM_1) THEN
    RETURN ATTRIB_1;
ELSE
    RETURN PARAM_1;
ENDIF
```

Where...
ATTRIB_1 is the value that is entered by the user.
PARAM_1 is the value of the parameter.

RETURN_MIN_2

The **RETURN_MIN_2** expression will compare three (3) values, and return the lowest, i.e. the minimum, of the three.

Syntax for the use of the **RETURN_MIN_2** expression is as follows:

```
IF (ATTRIB_1 <= PARAM_1) AND (ATTRIB_1 <= PARAM_2) THEN
    RETURN ATTRIB_1;
ELSEIF (PARAM_1 <= ATTRIB_1) AND (PARAM_1 <= PARAM_2) THEN
    RETURN PARAM_1;
ELSE
    RETURN PARAM_2;
ENDIF
```

Where...
ATTRIB_1 is the value that is entered by the user.
PARAM_1 and **PARAM_2** are the values of the parameters.

RETURN_MIN_3

The **RETURN_MIN_3** expression will compare four (4) values, and return the lowest, i.e. the minimum, of the four.

Syntax for the use of the **RETURN_MIN_3** expression is as follows:

```
IF (ATTRIB_1 <= PARAM_1) AND (ATTRIB_1 <= PARAM_2) AND
(ATTRIB_1 <= PARAM_3) THEN
    RETURN ATTRIB_1;
ELSEIF (PARAM_1 <= ATTRIB_1) AND (PARAM_1 <= PARAM_2) AND
(PARAM_1 <= PARAM_3) THEN
    RETURN PARAM_1;
ELSEIF (PARAM_2 <= ATTRIB_1) AND (PARAM_2 <= PARAM_1) AND
(PARAM_2 <= PARAM_3) THEN
    RETURN PARAM_2;
ELSE
    RETURN PARAM_3;
ENDIF
```

Where...
ATTRIB_1 is the value that is entered by the user.
PARAM_1, **PARAM_2** and **PARAM_3** are the values of the parameters.

Adding Formulas, Database Fields, Queries, Keywords and Constants

To include a value from a formula, database field, query, keyword or constant, in a logical expression, select the item from the drop-down list. You can include as many of these values as needed, by making multiple selections. The item is added where the cursor is placed in the **Logical Expression Block** edit box. For example, you could make a comparison of two values, retrieved through *Selection Queries*.

The following restriction applies:

All fields, selected in the **Fields** list, must be associated with the same function.

To create a new formula, query or constant, from the *Logical Expression Block Editor*, click ⊞ in the drop-down list for the item.

FINAL DRAFT

Formulas: To include a value calculated through a formula, select the formula from the drop-down list. Formulas are displayed between bar delimiters, |FORMULA_NAME|.

```
IF |IMP_VALUE| > 0 THEN
   RETURN |IMP_VALUE|;
ELSE
   RETURN 0;
ENDIF
```

To create a new formula, click ± to open *Formula Editor*. *See Formula Editor on page 183 for more information.*

Note: When the logical expression is run, the functions, associated with the formula must be open.

Keywords: Select a keyword from the drop-down list to include it in the logical expression. Keywords are used to retrieve a value currently in memory; such as **parcel id** to retrieve the parcel id of the current record. Keywords are displayed in lowercase.

For example, to include the building sequence for the current building record, in the logical expression, select the **building sequence** keyword.

```
For example,
IF parcel id > 0 THEN
RETURN ~parcel id~;
ELSE
RETURN 0;
ENDIF
```

The following table lists and describes the available keywords.

Code	Keyword	Description
*date	current date	Current Date
ac_id	aircraft id	Identification number of the current *Aircraft Excise Tax* record
ar_id	accounts receivable id	Identification number of the current *Account Receivable* record

Code	Keyword	Description
bldg_id	building id	Identification number of the current building
bldg_seq	building sequence	Identification *Sequence Number* of the current building
br_id	bankruptcy id	Identification number of the current *Bankruptcy* record
bt_id	boat id	Identification number of the current *Boat Excise Tax* account
cc_id	cash collection id	Identification number of the current *Cash Collection* record
co_id	complaint id	Identification number of the current *Complaint*, *Grievance*, *Request of Services* or *Workflow* record
dept	department	Department Code
folio_id	project folio id	Identification number of the current *Project Folio* record
frozen_id	frozen id	Identification number of the current *Frozen* record
h_id	hearing id	Identification number of the current *Hearing* record
haz_id	hazard id	Identification number of the current *Hazard* record
in_id	inspection id	Identification number of the current inspection
key_counter	activity id	Identification number of the current *Activity* record
land_id	land id	Identification number of the current land
mb_id	misc. billing id	Identification number of the current *Miscellaneous Billing* record
misc_id	miscellaneous id	Identification number of the current *Miscellaneous Billing* account
mv_id	motor vehicle id	Identification number of the current Motor Vehicle Account

Code	Keyword	Description
na_id	name id	Identification number of the current Name
of_id	offence id	Identification number of the current *Offense* record
p_id	parcel id	Identification number of the current parcel
pm_id	permit id	Identification number of the current *Building Permit*, *Electrical Permit*, *General Permit*, *Plumbing Permit*, *Permit to Name*, *Animal License*, *Business License*, *License to Name*, *Approval*, *Bond*, *Decision*, *Prosecution* or *Appeal* record
pp_det_id	pp detail id	Identification number of the current *Personal Property Item*
pp_id	personal property id	Identification number of the current *Personal Property* account

Validate Data Entry in a Logical Expression

To validate data entry in a Logical Expression, you can use the keyword **~textbox value~** note the use of tildes "~"

```
For example,
IF ~textbox value~ > 100000 THEN
RETURN False;
ELSE
RETURN TRUE;
ENDIF
```

Tables: To include a database field in a logical expression, you need to select the table first, from the **Tables** drop-down list.

Fields: After selecting the table, select the field from the **Fields** drop-down list. The value of this field for the current record is included in the logical

expression. These selected table and field are displayed in uppercase, between square brackets; for example [AC_ EXEMPTIONS.FROZEN_ID].

```
IF [PC_PARCEL.P_ID] > 0 THEN
   RETURN [PC_PARCEL.P_ID];
ELSE
   RETURN 0;
ENDIF
```

Action / Select Queries: You can include either *Action Queries*, i.e., queries that perform some action, such as updating records in one or more tables, adding records to a table or deleting records from a table, or *Selection* queries; i.e., used to retrieve data from one or more fields, in a logical expression.

```
For example, in the following logical expression:

IF {APP_VALUE} > 0 THEN
   RETURN |APP_VALUE|;
ELSE
   RETURN 0;
ENDIF
```

The *Appraised Value* of the current record is retrieved, through the {APP_VALUE} Selection query, and if the value is positive it is returned by the logical expression.

The queries need to be defined through the *User-Defined Queries Setup* form. To include a query, select it from the list. The query name is displayed in the **Logical Expression Block** edit box between braces, { }. For example, {AG_ VALUE}.

To create a new query, click ±. *This opens the SQL Definition Setup form. See SQL Queries on page 211 for more information.*

The following conditions apply:

- Only **Select Queries** can be used with the **IF** statement.
- Only **Action Queries** can be used with the **ACTION** statement.

Constants: Select a constant from the drop-down list, to include it in the

formula or click ± to create a new constant. Constants are displayed between ampersands (& &). See *Constant Value Editor on page 208* for more

information.

```
IF &TAX_RATE& > 0 THEN
  RETURN &TAX_RATE&;
ELSE
  RETURN 0;
ENDIF
```

Message: Enter a message to be displayed if the validation fails.

Dates, Numeric Values and Strings: You can also include dates, numeric values and strings, as follows:

- Dates are displayed between crosshatches: IF A = #2004111# THEN
- Numeric values are displayed: IF A = 999 THEN
- Strings are displayed between single quotation marks: IF A = 'text' THEN

Using a Temporary Field

You can include a temporary field in a logical expression. This field can hold any value, such as one generated from a query, database field or user input.

To include a temporary field, add the following to the beginning of the logical expression:

```
SET  ?TMP1? = <value>, where <value> is the value you are using
```

To include multiple temporary fields, enter each value separately:

```
SET  ?TMP1? = <value1>
SET  ?TMP2? = <value2>
 where <value1> and <value2> represent the values you enter
```

For example, the following logical expression is based on a keyword and database field:

```
IF (year id - [MA_BUILDINGS.YEAR_BUILT]) <= 10 THEN
   RETURN 6;
ELSEIF (year id - [MA_BUILDINGS.YEAR_BUILT]) <= 20 THEN
   RETURN 5;
ELSEIF (year id - [MA_BUILDINGS.YEAR_BUILT]) <= 30 THEN
   RETURN 4;
ELSE
   RETURN 3;
ENDIF
```

This logical expression can be written using temporary fields, as follows:

```
SET  ?TMP1? = year id
SET  ?TMP2? = [MA_BUILDINGS.YEAR_BUILT]
IF (TMP1 - TMP2) <= 10 THEN
   RETURN 6;
ELSEIF (TMP1 - TMP2) <= 20 THEN
   RETURN 5;
ELSEIF (TMP1 - TMP2) <= 30 THEN
   RETURN 4;
ELSE
   RETURN 3;
ENDIF
```

Executing Formulas and Logical Expressions

Note: When executing formulas and logical expressions that include keywords or database columns, all the applicable functions need to be open.

Alternately, you can add a *Selection Query* to the formula or logical expression, in order to retrieve values from database fields. *SeeSelection Queries on page 216*.

Constant Value Editor
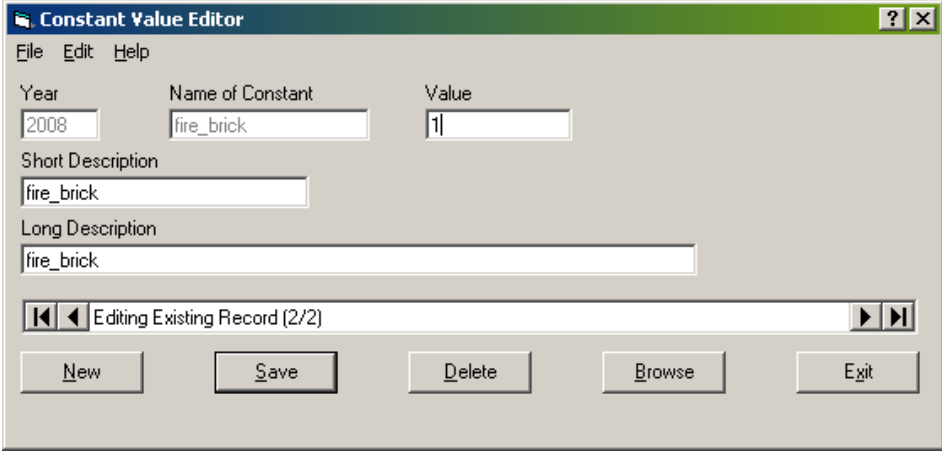
📖 Overview

Define and maintain constant values using the *Constant Editor* form. Constants can be used in formulas and logical expressions for values that change on a yearly basis. As constants are saved by year, you only need to edit the constant definition in order to update your formulas and logical expressions.

To access this form, from Govern's main screen:

1. Select *Tools* > **System Administration (Govadm32.exe)**

2. In Govern Admin select *Setup* > **Constant Editor**

Constant Value Editor Command Buttons

Creating a Constant Value: Click **New** to clear the screen so you can enter new information.

Saving a Constant: Click **Save** to save a new record or modifications to an existing one.
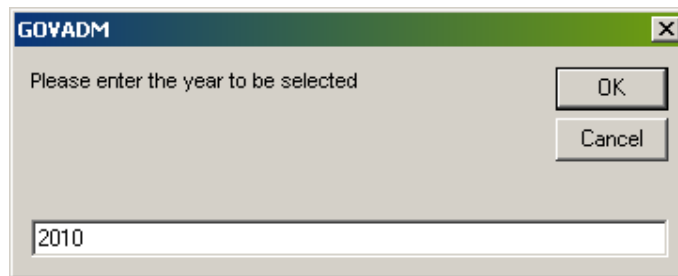
Deleting a Constant: Click **Delete** button to remove the current record.

Browsing Constants: Click **Browse** to view a list of the constants saved for the displayed year. To search records for a different year, you need to change the value in the **Year** field.

Constant Value Editor Parameters

Year: Constant tables are created by fiscal year. By default, this field displays the fiscal year used by your department.
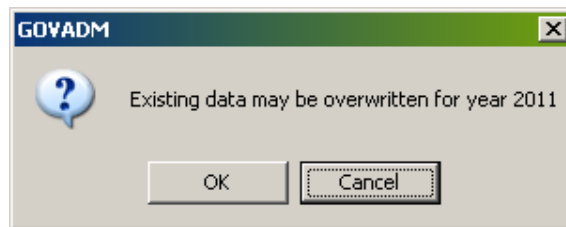
To change this value, for example, at the end of the year, select **Set Table Year** from the **Edit** menu. The following prompt appears:

Enter the year you want associated with the constant and click **OK**.

To copy the values from one year to the following year, select **Copy to Next Year** from the **Edit** menu. The following warning appears:

It is useful to copy constants from one year to the next. However, if you have already created constants in the following year with the same name, these will be overwritten.

Name of Constant: Enter the code for this constant.

Value: Enter a value for the constant.

Short Description: Enter a short description. This is used for fast data entry and look-ups if space is limited on forms.

Long Description: Enter a long description. This is displayed during look-ups and on forms and reports.

SQL Queries

📖 Overview

Govern Admin provides two forms for creating and maintaining SQL queries, *SQL Definition Setup* and *Queries by SQL Setup*:

In order to view, update or delete data, before running a batch process, you can create SQL Queries with the *Query Generator* in *Govern Batch Processing*. *See Creating SQL Queries in Govern Batch Processing on page 306.*

SQL Definition Setup

The *SQL Definition Setup* form is used for defining queries that can be added by a System Administrator or *Super User* to:

- **New**, **Save** and **Delete** buttons on a Govern function
- User-defined command buttons added to a function
- User-defined formulas and logical expressions
- The customizable Govern *CoolBar*
- Activity steps linked to a permit, offense or workflow type

Queries by SQL Setup

The *Queries by SQL Setup* form is used for defining queries for the *Search by SQL* function in Govern. These queries can be selected by the user and are typically used for retrieving records.

> **Note:** User with Super User or administrator rights can run Action or Selection queries, from this function. Other users can run Selection queries only. See *Selection Queries* and *Action Queries on page 216* for details on queries.

You can further restrict access to this function, by user and by jurisdiction, as follows:

- Grant access to the *Query by SQL* option for specific users only.
- Restrict user editing rights on this function, so that certain users can select and execute pre-defined queries but not modify them, create new ones or select other queries from an alternate file. *See Disable Editing on Query*

by SQL on page 63 for more information.
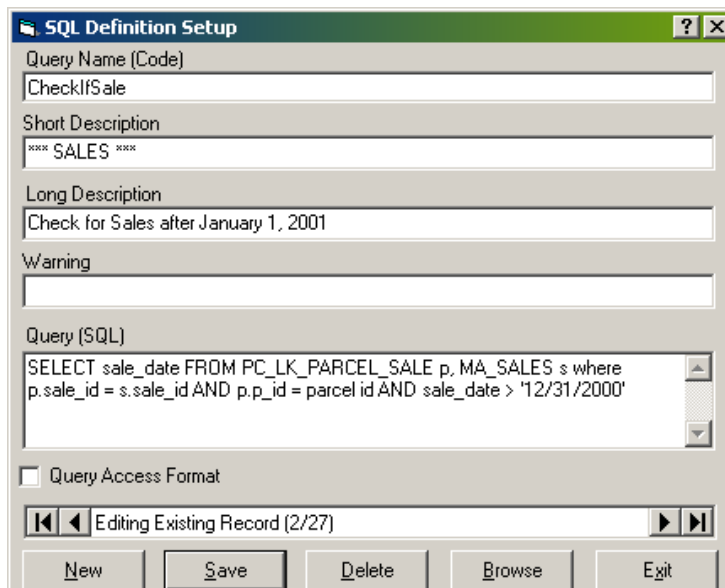
- If you support multiple jurisdictions in your setup, define queries by jurisdiction. Only users with access to the jurisdiction can access the queries. You can set four types of access rights for jurisdictions

See User Maintenance on page 60 for more information.

SQL Definition Setup

To access the *SQL Definition Setup* form, from Govern's main screen:

1. Select *Tools* > **System Administration (Govadm32.exe)**

2. In Govern Admin select *Setup* > **SQL Definition Setup**
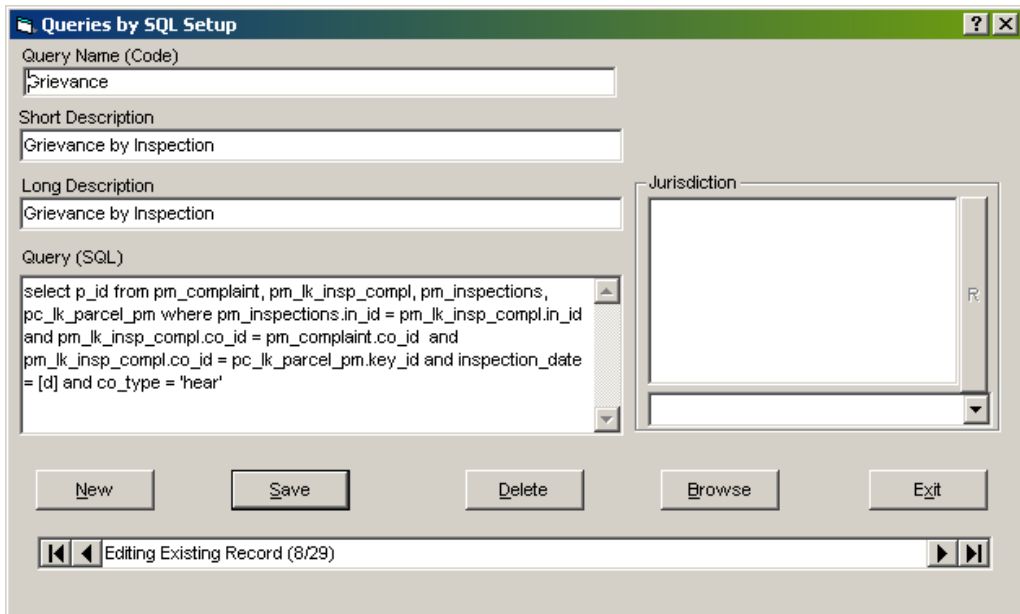
Queries by SQL Setup

The *Query by SQL* search function is used primarily for retrieving records through *SQL Selection* queries. This function also includes a SQL Editor for composing new queries or retrieving and modifying existing ones from another file.

To access this form, from Govern's main screen:

1. Select *Tools* > **System Administration (Govadm32.exe)**

2. In Govern Admin select *Setup* > **Queries by SQL Setup...**

> **Note:** The Jurisdiction group will only be present when the option for *Support of Multiple Jurisdiction* is selected under the **Options** tab of the *System Registry Maintenance* form.

SQL Definition Setup and the Query by SQL Setup Command Buttons

Viewing SQL Query Records: Each query is stored as a separate record.

Use the right ▶ ▶| / left |◀ ◀ navigational arrows to view individual records or click **Browse** to view a list of the records, by query name and definition.

Creating a Query: Click **New** to clear the form.

Save: Click **Save** to save a new query or modifications to an existing one.

- Queries created through the *SQL Definition Setup* form are saved to VT_USR_QUERY
- Queries created through the *SQL Queries Setup* form are saved to VT_USR_QUERY2

Delete: Click **Delete** to remove the current record.

Exit / Cancel: When you click **New**, the **Exit** button changes to **Cancel** so that you can clear unsaved data without closing the form. If there are any unsaved modifications, a confirmation message appears when you click **Cancel**. Click **Yes** to save the data or **No** to close the form without saving.

SQL Definition Setup and the Query by SQL Setup Parameters

Query Name (Code): Enter a name or code to identify the query.

For the queries that retrieve data and display a value, such as the *Coolbar Queries*, you can add the following characters to the beginning of the name. These characters format the value in the result:

Character	Format Type	Example
$	Currency with decimals	$2,000.25
@	Currency without decimals	$2,000
#	Numeric with decimals	2,000.25
.	Numeric without decimals	2,000

For example, the following query retrieves the appraised value of the property and formats it as the *Currency without decimals* type*:*

Query Name:	**@GetApp**
Query:	`SELECT appraised_value FROM MA_MASTER WHERE p_id = parcel id and frozen_id = frozen id and year_id = year id`
Result:	Appraised Value: $288,000

Short Description: Enter a short description. This is used for fast data entry and look-ups if space is limited on forms.

Long Description: Enter a long description. This is displayed during look-ups and on forms and reports.

Warning: Enter a message to be displayed before the query is executed, in this optional field. For example, if you are linking a query to the **Delete** button of a function, create a message to notify the user that one or more records will be deleted. The user can confirm or cancel the action.

> **Note:** This field is present on the *SQL Definition Setup* form only.

Jurisdiction: If you are restricting the query to specific jurisdictions, select the jurisdictions from the drop-down list. Leave this field blank to make the query accessible in all jurisdictions.

To remove a jurisdiction from the list, highlight the jurisdiction and click **R**.

> **Note:** This list box is present on the *Query by SQL Setup* form only. It is visible only if the **Support of Multiple Jurisdictions** option is selected on the *System Registry Maintenance* form. See *System Registry Maintenance on page 16*.

Query (SQL): Enter the new *SQL Query* statement or modify an existing one, in this edit box.

Creating Queries

You can compose and store both *Action Queries* and *Selection Queries* in the edit boxes of the *SQL Definition Setup and Query by SQL Setup* forms. To retrieve or to use a value from the current record; for example, while running a query from a function or formula, you can include a *keyword. See Using Keywords on page 218 for details*.

> **Note:** Keywords can be included on the *SQL Definition Setup* form, only.

To prompt for user input; for example, to refine a search to records of a specific value, you can include *variables* in a query. *See Using Variables on page 220 for details*.

> **Note:** Variables can be included on the *Queries by SQL Setup* form only.

> **Note:** On the *Queries by SQL Setup* form, you must use SQL syntax for Microsoft® Access®.

Selection Queries

Selection Queries are used to retrieve records from one or more specified tables, according to the selection criteria.

The syntax is as follows:

```
SELECT [column] FROM [table] WHERE [criteria]
```

For example, the following query, retrieves the City District name from the PC_AREA table for the record matching the current parcel ID, frozen ID and year.

```
SELECT DIST_CITY FROM PC_AREA WHERE p_id=parcel id and
frozen_id=frozen id and year_id = year id
```

Action Queries

Action Queries are used t*o* perform some action, such as updating records in one or more tables, adding records to a table, deleting records from a table or creating a new table or index.

This section provides simple examples of *Update*, *Append* and *Delete Queries*. Since the *SQL Definition Setup* and *Queries by SQL* setup forms are used for queries that are run multiple times, it is better to compose and run a *Create Query* from outside Govern.

Update Queries

Update Queries are used to modify records in one or more tables, by changing values in specified tables and fields, according to certain criteria.

The syntax is as follows:

```
UPDATE table.* SET value WHERE criteria
```

For example, the following query enters the value *abc* in the *Fire District* field of the PC_AREA table, wherever the value for this field is null.

```
UPDATE pc_area SET dist_fire = 'abc' WHERE dist_fire IS
NULL
```

Update Queries are typically used when you need to change multiple records in a table or records in multiple tables.

> **Tip:** You do not obtain a list of results from running this type of query. To verify which records will be changed, you can run a *Selection Query* using the same parameters and criteria and view the *Results* screen.

Append Queries

Append Queries are used to add a single record to one or more table. You need to specify the fields to which you are adding values and the value for each field. Otherwise, the default value or Null is entered.

The syntax is as follows:

```
INSERT INTO table (column list) VALUES (value list)
```

For example, the following query adds a record to the VT_USR_NAMECODE table, entering the values ENG, LD, ITR and In Trust in the language, department, code, short description fields.

```
INSERT INTO vt_usr_namecode (language,dept,code,short_desc)
VALUES ('ENG',' ','ITR','In Trust')
```

You can also append multiple records to a table, by first selecting the records in another table. For this, a *Selection Query* is added to the *Append Query*.

Delete Queries

Delete Queries are used to remove records from one or more tables.

The syntax is as follows:

```
DELETE [table.*] WHERE criteria
```

For example, the following query, add records containing the year 2004 are deleted from the PC_AREA table.

```
DELETE FROM pc_area WHERE year_id = 2004
```

> **Tip:** The *Delete Query* deletes more than the specified fields, it deletes the entire record. To delete data from specific fields only, create an update query that changes the values to Null.

Using Keywords

You can include a *keyword* in a query to retrieve or perform an action on a value in the current record, or the record most recently saved and still in memory.

To include a keyword, double-click in *SQL Definition Setup* form. This displays the following list of keywords (Table: VT_SY_BRULE):

Code	Keyword	Description
*date	current date	Current Date
ac_id	aircraft id	Identification number of the current *Aircraft Excise Tax* record
ar_id	accounts receivable id	Identification number of the current *Account Receivable* record
bldg_id	building id	Identification number of the current building
bldg_seq	building sequence	Identification *Sequence Number* of the current building
br_id	bankruptcy id	Identification number of the current *Bankruptcy* record
bt_id	boat id	Identification number of the current *Boat Excise Tax* account
cc_id	cash collection id	Identification number of the current *Cash Collection* record
co_id	complaint id	Identification number of the current *Complaint*, *Grievance*, *Request of Services* or *Workflow* record
dept	department	Department Code
folio_id	project folio id	Identification number of the current *Project Folio* record

Code	Keyword	Description
frozen_id	frozen id	Identification number of the current *Frozen* record
h_id	hearing id	Identification number of the current *Hearing* record
haz_id	hazard id	Identification number of the current *Hazard* record
in_id	inspection id	Identification number of the current inspection
key_counter	activity id	Identification number of the current *Activity* record
land_id	land id	Identification number of the current land
mb_id	misc. billing id	Identification number of the current *Miscellaneous Billing* record
misc_id	miscellaneous id	Identification number of the current *Miscellaneous Billing* account
mv_id	motor vehicle id	Identification number of the current Motor Vehicle Account
na_id	name id	Identification number of the current Name
of_id	offence id	Identification number of the current *Offense* record
p_id	parcel id	Identification number of the current parcel

For example, in the following query, the *parcel id*, *frozen id* and *year id* keywords are used to retrieve the appraised property value from the MA_ MASTER table, where the P_ID, FROZEN_ID and YEAR_ID fields match the values for the current record.

```
SELECT appraised_value FROM ma_master WHERE p_id=parcel id
and frozen_id=frozen id and year_id=year id
```

Using Variables

You can compose and store queries, on the *Query by SQL Setup* form, with the following variables or parameters. These queries can be used, for example, to refine a search to only the records matching the values, or range of values, specified by the user:
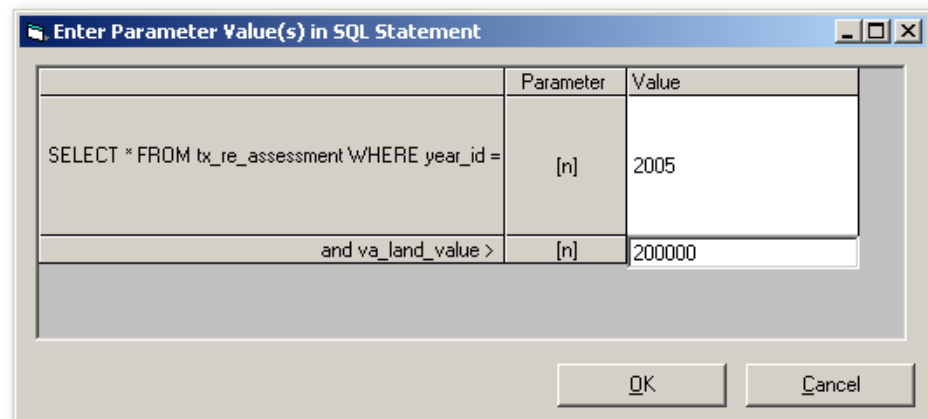
- [s] for string
- [n] for numeric
- [sl] for string list
- [nl] for numeric list
- [d] for date

Note: When including these variables in a query, use lowercase letters.

When these parameters are included, the user is prompted to input one or more values. For example, in the following query:

```
SELECT * FROM tx_re_assessment WHERE year_id = [n] and
va_land_value > [n]:
```

the user is prompted to enter the year and the minimum land value:

FINAL DRAFT

You can use a comma-separated list in SQL queries and create and save queries with variables and use them for retrieving a list of text or numeric information:
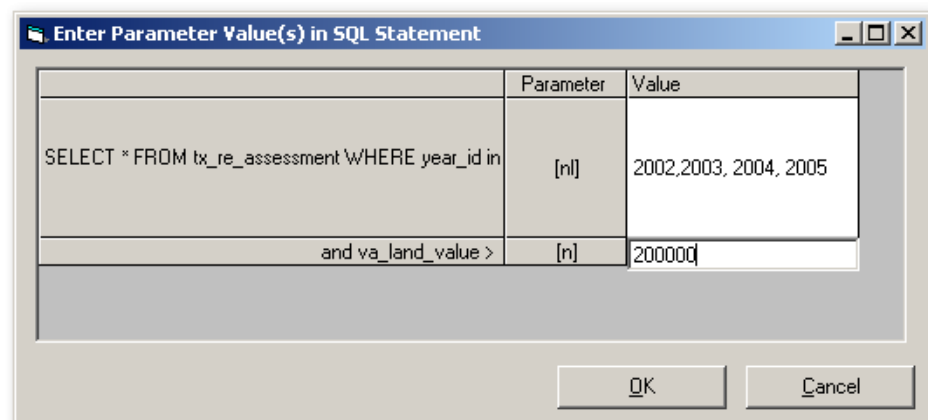
Note: If you use the numeric list [nl] or sting list [sl] parameters, the user can enter more than one parameter. Parameters must be separated by a comma.

For example, if the query contained `year_id in [nl]`, the user could enter multiple years, as follows: `2001, 2002, 2003, 2004`

Similarly, if the query contained `pm_type in [sl]`, the user could enter multiple permit types, as follows: `Plumbing_Res, Roof, Shed`

The following screen shot, illustrates the use of the numeric list in the following query:

```
SELECT * FROM tx_re_assessment WHERE year_id in [nl] and
va_land_value > [n]:
```


Similarly, the following screen shot, illustrates the use of the string list in the following query:

```
SELECT * FROM pm_master WHERE pm_type in [sl]:
```

FINAL DRAFT
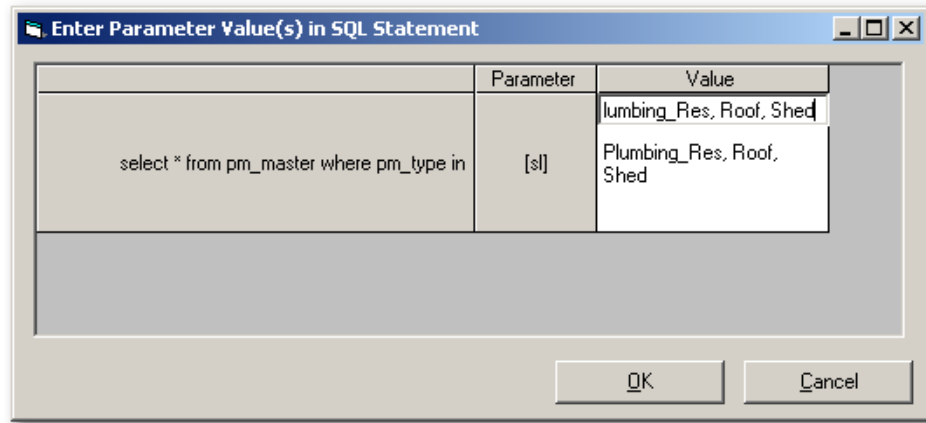
Refer to the Property Control guide for more information on this function.

Using Queries in Govern

This section provides examples of how queries can be used throughout Govern.

SQL Definition Setup

The *SQL Definition Setup* edit box is used for creating queries for the following forms: *Function Setup*, *New Command Button*, *CoolBar Queries Setup*, *Formula Editor*, *Logical Expression Editor* and *Permit System Activities*.

Function Setup

Action Queries can be linked to the **New**, **Save** or **Delete** button of a function, in order to perform some action, such as:

• updating records in one or more tables
• adding records to a table
• deleting records from a table

These queries can be applied to both existing and user-defined parameters. *See Adding Business Rules to a Function on page 126, for more information.*

For example, the following query adds one to the *Transponder Identification Number* in the UB_LK_ACCT_METER table. This query could be added to the **New** button of a UB function.

```
UPDATE ub_lk_acct_meter SET transponder = (SELECT
MAX(transponder)+1 FROM ub_lk_acct_meter WHERE transponder
< 10000) WHERE ub_id = utility billing id and transponder is
null
```

New Command Button

Action Queries can also be linked to the customized buttons added to a function. See *New Command Buttons on page 257*.

CoolBar Queries Setup

Selection Queries can be linked to the new Govern CoolBar in order to display data from the open functions. *See CoolBar Queries Setup on page 118.*

For example, the following query retrieves the building value for the building, parcel, frozen ID and year of the current record.

```
SELECT BLDG_VALUE FROM ma_master where p_id = parcel id and frozen_id
= frozen id and year_id = year id
```

The result of each query is displayed as a separate item on the CoolBar The text and the background color can be modified and the item can be repositioned.

Formula Editor

Selection Queries can be included in a formula in order to perform a calculation on a retrieved value. *See Formula Editor on page 183, for more information.*

For example, the following formula, rounds the agricultural value, retrieved through the AG_VALUE query and divides this by two.

```
RND({AG_VALUE}/2)
```

Logical Expression Block Editor

Both *Selection* and *Action Queries* can be included in a logical expression, in order to use values, retrieved through queries:

The following conditions apply:

- Only **Selection Queries** can be used with the **IF** statement.
- Only **Action Queries** can be used with the **ACTION** statement.

See Logical Expression Block Editor on page 191 for more information.

For example, in the following logical expression, the Agricultural Value is retrieved through the AG_VALUE query. If this value is positive, it is returned by the expression.

```
IF {AG_VALUE} > 0 THEN
  RETURN |AG_VALUE|;
ELSE
  RETURN 0;
ENDIF
```

Permit System Activities

Both *Selection* and *Action Queries* can be linked to an activity through the Permit System Activities, *Activities (Offense Function)* and *Activities (Workflow Functions)* for validating an activity step. *Refer to the Administrator section of the Permits & Inspections guide for details.*

For example, the following query validates the logged in user with the user IDs listed in the table, USR_ACT_SECURITY, for the specified activity, department and reference number.

```
SELECT COUNT (*) FROM usr_act_security WHERE usr_id = user
id and activity_no = 10 and dept = 'BD' and key_type ='pm'
```

Note: Queries launched from a System Activity must return a single value, either a 0 or 1.

FINAL DRAFT

Queries by SQL Definition Setup

The following queries can be used to retrieve records through the *Query by SQL* search in Govern, with user input.

> SELECT * FROM pc_owner WHERE as_of_date =[d] and info_source= [s] and seq_priority=[n]
>
> SELECT * FROM tx_re_assessment WHERE year_id = [n] and va_land_ value < [n
>
> SELECT * FROM pc_parcel WHERE tax_map_ufmt >= [s] and tax_map_ ufmt <= [s]

Refer to the Property Control guide for more information on this search function.

File Menu

Overview

View and print table data or the table structure using the *Show / Print Tables* feature.

Show Tables List

Click the *Show Tables List* option to view a listing of all the database tables. You can also view the table structure and properties.
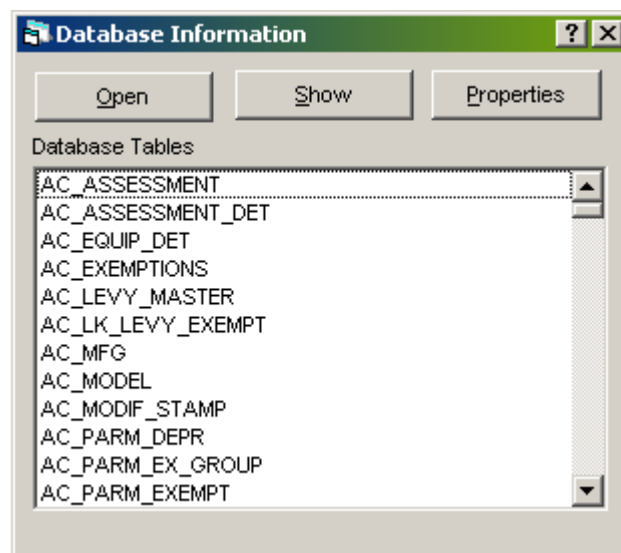
Opening a Database Table

To view a table, highlight it, in the *Database Tables* section and click **Open**. The selected table appears in a *Browsing* screen.

You can view all the database columns and fields and perform the following actions:

- **Sort**: Click on a column heading and then click **Sort** to change the order of the listed records.
- **Copy**: Highlight a record, a column or any section of the table and click **Copy** to copy the data to the Windows clipboard.
- **Find**: Click on a column heading and click **Find**. Then enter the applicable information to search for a record in the list. The first match will be highlighted.

- **Print**: Click the printer icon to open the *Print* dialog box and select a printer for the record list.

Viewing the Structure Table

Highlight a table and click **Show** to view the *Table Structure*.
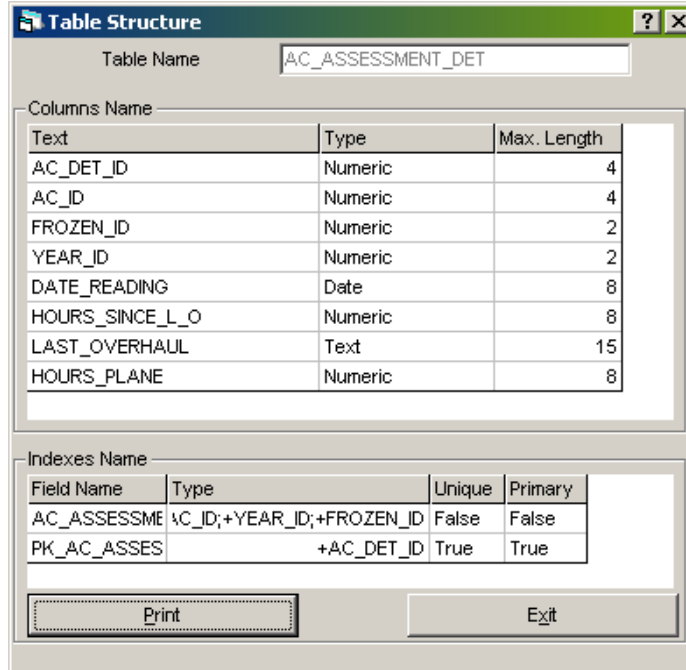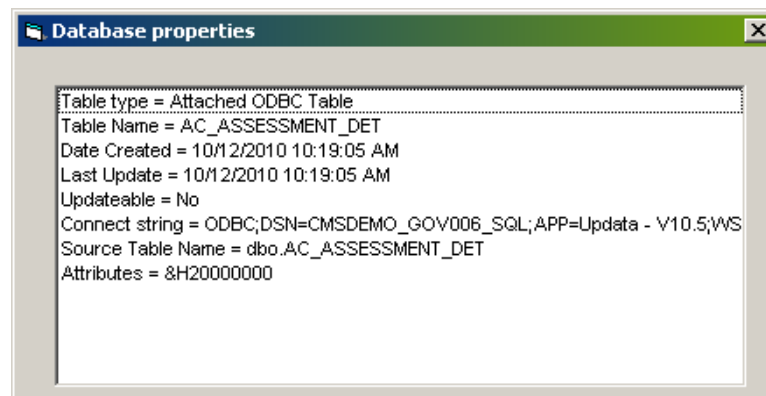
The column name, type and length appear in the upper section of the form. Information on the table index, or indexes, appears in the lower.

Click **Print** to print the table structure.

Viewing the Properties of a Specific Table

Highlight the table in the list and click **Properties** to view a list of the table properties.

Print Table List

To print a list of all the database tables, use the *Print Table List* option.

To access this form, from Govern's main screen:

1. Select *Tools* > **System Administration (Govadm32.exe)**

2. In Govern Admin select *File* > **Print Table List**
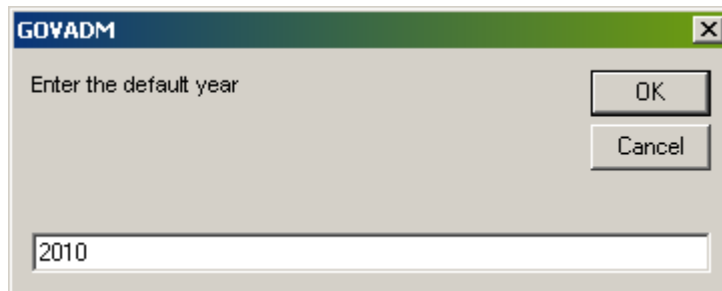
To print the list, select your printer, set the preferences and click **Print**.

Set the Default Year

Change the Govern Admin Default Year, using this feature.

To access this form, from Govern's main screen:

1. Select *Tools* > **System Administration (Govadm32.exe)**

2. In Govern Admin select *File* > **Set Default Year**

Saving a New Default Year: Click **OK** to save the new default year.

Default Year: Enter the Year to process in the Text Box.

Click the year field on the Govern Admin toolbar to access this message box, directly.

Govern Admin Tools Menu

📖 Overview

This section describes the options in the Govern Admin Tools menu.

> **Note:** Govern's suite of applications, Govern Admin, Govern, Lockbox Data Entry and Govern Batch Processing must all be located in the same directory. Typically, this is Govern / Bin.

Govern for Windows

Select this option to launch the Govern application. The Govern application must be named *govern32.exe*.

To launch Govern for Windows, click the Govern ⊕ icon.

Govern Batch Process

Select this option to Launch the Govern Batch Processing application. This application must be named *govbat32.exe*.

To launch the Govern Batch Processing application for Windows from the toolbar, click the GovBatch 🕐 icon.

Lockbox Data Entry

Select this option to launch the Lockbox Data Entry application. This application must be named lockbx32.exe.

To launch the Lockbox Data Entry application directly from the toolbar, click the Lockbox 📇 icon.

Inspector's Database at the Next Startup

This option is automatically selected after the *Export to an Inspector's Database* process is run and before the *Import from an Inspector's Database* is run. The export process creates an extract of the database that the

inspector can use while in the field. Exported inspections are locked on the master database on the server. Inspections will be unlocked when re-imported.

This option is selected to ensure that Govern's database is not updated before the inspector's changes are uploaded and that the two databases are synchronized. *Refer to the Permits and Inspections guide for details*.

Rebuild .mdb for All Users at Next Logon

Select this option to rebuild the attach and local tables for each user, the next time they log on to the system.

Generate Missing Dictionary Entries

Select this option to update the dictionary. This populates SY_DICT_ DESC with data from the user validation tables; i.e., the tables beginning with VT_USR. Run this process after configuring the system for the first time, after updating the database and at anytime data is missing from the user forms.

CHAPTER 2: USER

📖 Overview

This section describes the options for customizing the Govern functions. For example, you can add new command buttons, fields and labels, modify, rename, or reposition existing ones.
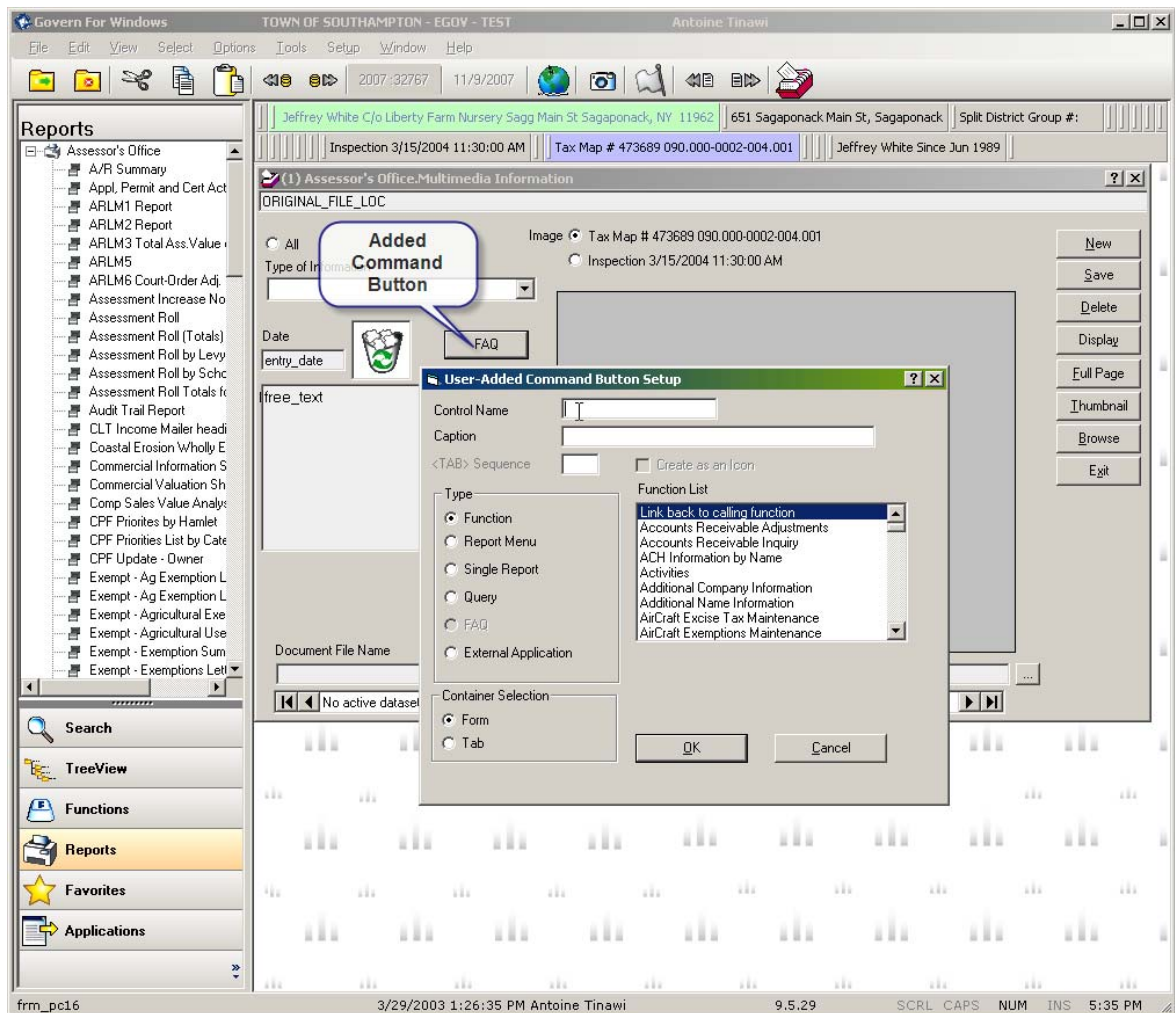
Options for Customizing the Govern Functions

These options are accessed through the **Setup** menu. This menu is visible to Super Users and Administrators only.

> **Note:** Modifications made to this menu apply to all users.

Object Dragging Mode

Use *Object Dragging Mode* to change the layout of a function by repositioning or removing the existing command buttons, labels and fields. *See Object Dragging Mode on page 235*.

Field Setup Mode

Use *Field Setup Mode* to modify existing command buttons, labels and fields; for example, by modifying the size, changing the names, linking validation tables and associating values. *See Field Setup Mode on page 237*.

New Database Columns

Use the *New Database Columns* option to define and add new columns to the database and to the functions. You can add various types of fields; for example, numeric, text, date / time or memo fields and then link a formula or logical expression, if required. *See New Database Field Creation on page 251*.

New Labels

Use the *New Labels* option to add a new label to the function; for example, to group customized fields. *See New Labels on page 256*.

New Command Buttons

Use the *New Command Buttons* option to add customized command buttons to a function. From these command buttons, you can launch another function, open a report, run a query or view or modify an FAQ. *See New Command Buttons on page 257*.

Additional Form Dividers

Use the *Additional Form Dividers* option to add an extra tab to a function; for example, for adding customized fields. *See Additional Form Dividers on page 269*.

Resetting the Custom Form Layout

Use the *Reset Custom Form Layout* option to reset a function to its original size; to restore the original command buttons and parameters, and to remove the customized buttons and parameters. All customized items are positioned on the top left corner of the function. *See Reset Custom Form Layout on page 270.*

Browse Setup

Use the *Browse Setup* option to modify the *Browsing* screen of the function. You can add, remove and reposition the columns. In addition, you can display minimum, maximum, average and total values and change the format of numeric fields. *See Browse Setup on page 271.*

Save Current Form Size

Use the *Save Current Form Size* option to save the size of a function, after you change it. Otherwise, the function is reset to its original size when you click **Save**. *See Save Current Form Size on page 273.*

Object Dragging Mode
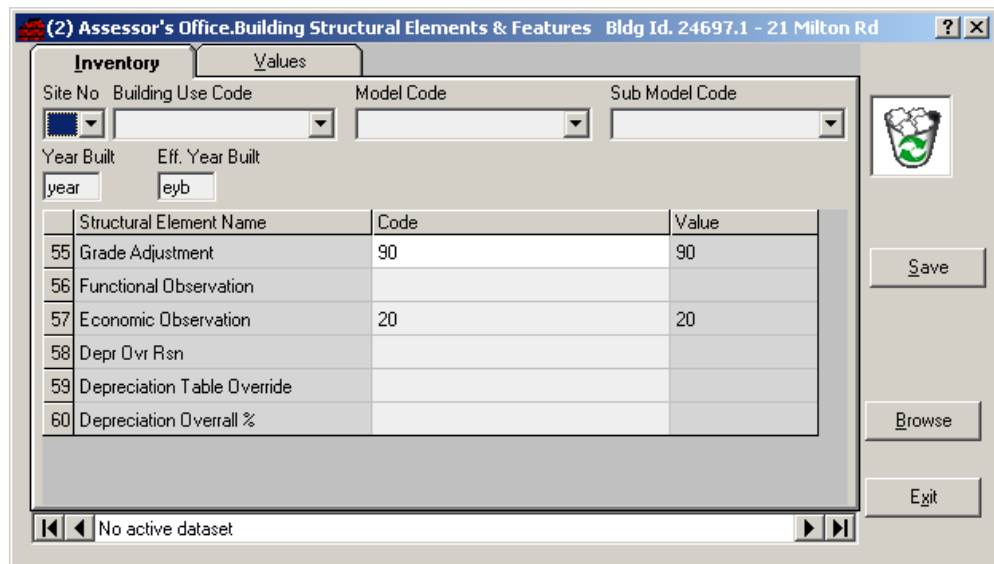
📖 Overview

Use *Object Dragging Mode* to change the layout of a function by repositioning or removing the existing command buttons, labels and fields.

You can cancel all your modifications, restore the original command buttons and parameters and restore the original setup by selecting Reset Custom Form Layout. *See Reset Custom Form Layout on page 270.*

To access this option:

Open the function, you want to change, and select **Setup** > **Object Dragging Mode**.

When you are in this mode, DRAGGING OBJECTS appears on the Govern *Status Bar* and the *trash can* icon appears on the active function.

Repositioning Fields

Click on the field you want to reposition and using the mouse, drag the selected field object to the location of your choice. You can also move the field

labels and command buttons. Once this is complete, cancel the Object Dragging Mode.

Removing Fields

Click on the field you want to remove and using the mouse, drag the selected field to the *trash can*. The *trash can* icon will then change from green to pink. You can also remove the field header. You need to move the header and field separately.

> **Note:** The fields added on the Form tab of the Permit functions cannot be moved or removed through the Object Dragging Mode. Refer to the *Permit Type Maintenance* section in the *Permits & Inspections* guide for details on Adding Columns to Permit Types.

Resetting Custom Form Layout

To reset the layout form, cancel the *Object Dragging Mode*, then select *Setup* > **Reset Custom Form Layout**. After the reset all the controls return to the original position and all user-added controls are placed in the top left corner, at position 0, 0.

Cancelling Object Dragging Mode

To return to *Standard Mode*, select *Setup* > **Cancel Object Dragging Mode**.

Field Setup Mode

📖 Overview

With *Field Setup Mode* you can make the following modifications to an existing field on a Govern function:

- Modify a label

- Link a validation table to a field
- Modify the size of a field
- Create a default value for a field
- Change the tab sequence of a series of fields
- Link a formula or logical expression to an existing field (*See Link Formula / Link Logical Expression on page 247*)
- Spell check a field *(See under the column Validation Type group on page 241)*

To access this mode, open the function you are modifying in Govern and select *Setup* > **Field Setup Mode**.
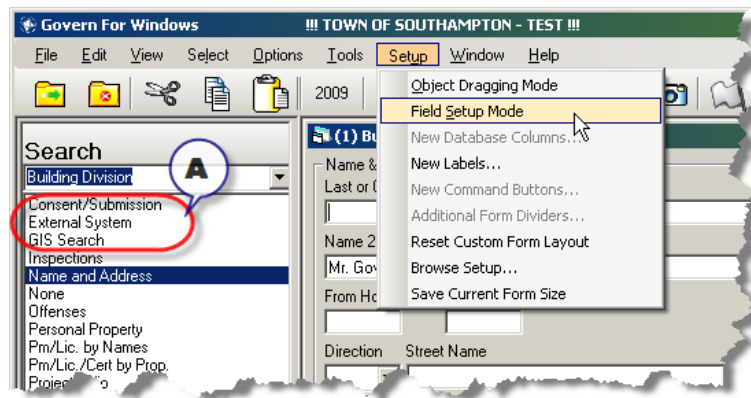
When you are in this mode, "FIELD SETUP MODE" is displayed in the *Status Bar* in the lower left hand corner of the Govern window.

Modifying a Field Label

In order to modify a field in a function, first open the required function.

To modify a field label:

1. Select *Setup* > **Field Setup Mode** on the Govern menu.

2. Double-click on the field label requiring the change.

The *Field Attribute* form appears.

3. Modify the text.

4. Click **OK**.

> **Note:** If no modification is required, click **Cancel** to close the *Field Attribute* form without saving any modifications.

5. Select *Setup* > **Cancel Field Setup Mode**.

Changing Field Properties

To change field properties:

1. Open the function you want to edit.

2. Select **Setup** > **Field Setup Mode**.

3. Double-click on the field to edit. This opens the *Field Setup* form.

4. Modify the field by selecting the options described in this section.

5. Select **Setup** > **Cancel Field Setup Mode**.

Field Setup Mode Command Buttons

OK: Select **OK** to save you modifications and close the form.
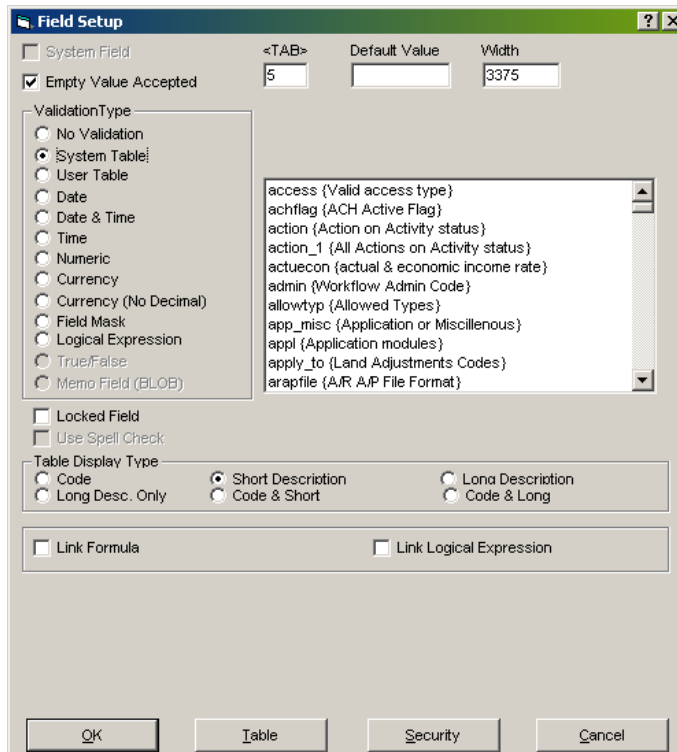
Table: Select **Table** to open the *Validation Table Header* form, where you can create a new table or create new codes for an existing table. See *Validation Tables on page 85* for information on this form.

Security: Select **Security** to access the Group / User Security form.

Cancel: Select **Cancel** to close the form with saving your modifications.

Field Setup Mode Parameters

The parameters for the *Field Setup* form are as follows:

System Field: This option is automatically selected for the *System Fields.* You can modify only a few of the properties of these fields.

Empty Value Accepted: Select the **Empty Value Accepted** option if the parameter can be left blank, by the user. If the field must always contain a value, deselect this option.

<TAB>: This field displays the tab sequence number of the selected field. This represents the order the cursor moves from to field, as the user select **Tab** on the keyboard. For example, if the field has a tab sequence of 2, the cursor is positioned on this field after the user selects **Tab** twice or after entering a value in the field with tab sequence 1 and clicking **Tab**.

Field Setup Mode Default Value Codes

A default value is a one that will appear in a field of a form prior to a users input. Default values can be useful in search forms where a user ID is a required entry on the form. The user ID code can be preset to appear by default in the field.

In *Field Setup Mode* you specify any of the following default value codes.

Default Value Code	Description
$time	Enter this code to set the current time to appear as a default.
$date	Enter this code to set the current date as the default value that will appear in the field. The date is formatted as defined in your Windows environment.
$datetime	Enter this code to set the current date and time as the default in the field.
$year	Enter this code to set the field to the current year.
$userid	This code sets the field with the current logged in user ID.
$username	This code sets the field with the current logged in user name.
$department	Entering this code will set the field with the department code; this will appear in the field as a two (2) character code.

> **Note:** When entering default value codes in *Field Setup Mode*, all characters MUST be lowercase or the codes will not work.

Default Value: Enter a default value for the field, if applicable. For example, in the **City** field, on the *Name & Address* function, you can enter your city name so that the users do not have to enter it each time.

Width: Enter the width of the field, in **Twips** or modify the existing value, when applicable.

> **Tip:** 15 Twips = 1 Pixel

Internet Display Order: This field is used for displaying user-added fields on the eGovernment solution Web pages. Enter a value to indicate the order in which the selected field is to be displayed on your Web site. *Refer to the eProfile guide for details.*

Column Name: This field displays the name of the selected field. This is for informational purposes only and cannot be modified.

Validation Type group

The following *Validation Types* can be applied to a field. For certain types, you need to enter additional information, as described in the **Description** column:

Validation Type	Description
No Validation	Select this option if you do not want to apply a validation to the field.
System Table	Select this option to link a *System* validation table to the field. Next, select the table in the list box and select a display option, under **Table Display Type**.
User Table	Select this option to link a user validation table to the field. Next, select the table in the list box and select a display option, under **Table Display Type**

Validation Type	Description
Date	Select this option to set the field as a Date type. Enter **$date** as the default value to add the current date to new records. Enter **$date + 1** to use the day after the current date, **$date + 2** to use two days after the current date, etc. To apply a range of dates, enter values in the Minimum and **Maximum** fields; for example, **Minimum** = 1/1/1990, Maximum = 12/31/2999. The date is formatted as defined in your Windows environment.
Date & Time	Select this option to set the field as a *Date / Time* type. Enter **$datetime** as the default value to add the current date and time to new records. To apply a range of dates, enter the values in the **Minimum** and **Maximum** fields.
Time	Select this option to set the field as a *Time* type. Enter **$time** as the default value to add the current time to new records. To apply a range of dates, enter values in the **Minimum** and **Maximum** fields.
Numeric	Select this option to set the field as a *Numeric* field. The user will not be able to enter letters or special characters. To apply a range of values, enter the values in the **Minimum** and **Maximum** fields.
Currency	Select this option to set the field as a *Currency* field. The information entered in this field follows the currency model defined in your Windows environment.
Currency (no decimal)	Select this option to set the field as a *Currency* field, without decimals. The information entered in this field follows the currency model defined in your Windows environment.
Field Mask	Select this option to apply a field mask to the field. Then select the mask from the **Field Mask** drop-down list (Table: USR_ FIELDS_MASK). This automatically formats the information entered according to a pattern defined on the *Pattern Name Maintenance* form. Use this option for phone numbers, postal or *ZIP* codes, social security numbers, etc. *See Global Field Validation Mask on page 78.*

Validation Type	Description

Logical Expression	Select this option to apply a Logical Expression to the field. Then, select the expression from the list box.
	
	Note: You can only use a Logical Expression that evaluates to true or false; such as the following*:
	
	IF ~textbox valuen~ / 5 > 0 THEN
	  RETURN TRUE;
	ELSE
	  RETURN FALSE;
	ENDIF
	
	To use another type of logical expression, select the **Link Logical Expression** option.
	
	* This logical expression is provided as an example, only. In this case, it would be easier to use the **Minimum** validation type. However, if you wanted to combine a textbox value, from this field, with another database field, you could apply a logical expression.
	
	If a logical expression has already been applied and you change for another, a warning message appears.
	
	See Logical Expression Block Editor on page 191 for details on creating and using logical expressions.
	
	See *Using Keywords on page 218* for details on textbox values.

True / False	This option is enabled if the selected field is a check box.
Memo Field	This option is enabled if the selected field is a notes and comments or other memo field. This type of field can contain a variable amount of text, depending on your setup.
Locked Field	The *Locked Field* feature, for making a field display only, is now activated through a check box; so that you select a field validation type **and** lock the field.
Use Spell Check	When selected, will apply spell checking to the selected notes and comments field.

Table Display Type group

Select one of the following options for displaying the items from the validation table, in the field:

- **Code**: to display the validation code
- **Short Description**: to display the short description
- **Long Description**: to display the long description
- **Code & Short**: to display both the code and the short description
- **Code & Long**: to display both the code and the long description
- **Long Description Only**: This option is enabled only for *Text* type fields, not for the *Combo Box* type fields. To select an item from a text field, linked to a validation code, the Govern user needs to click in the field. A secondary screen is displayed:
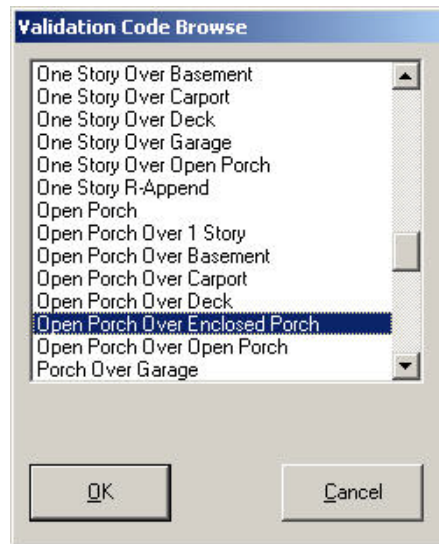
- For the other *Table Display Types*, even if the short or long description is displayed, on the *Validation Code Browse* screen, the code is saved to the function. However, if **Long Description Only** is selected, the long description is saved to the function.

  The following screen shots show the difference between the *Table Display Types* **Long Description** and **Long Description Only**.

Long Description

Long Description Only

Drawing
Enclosed Porch Over Open Porch
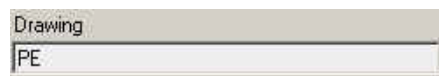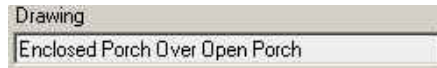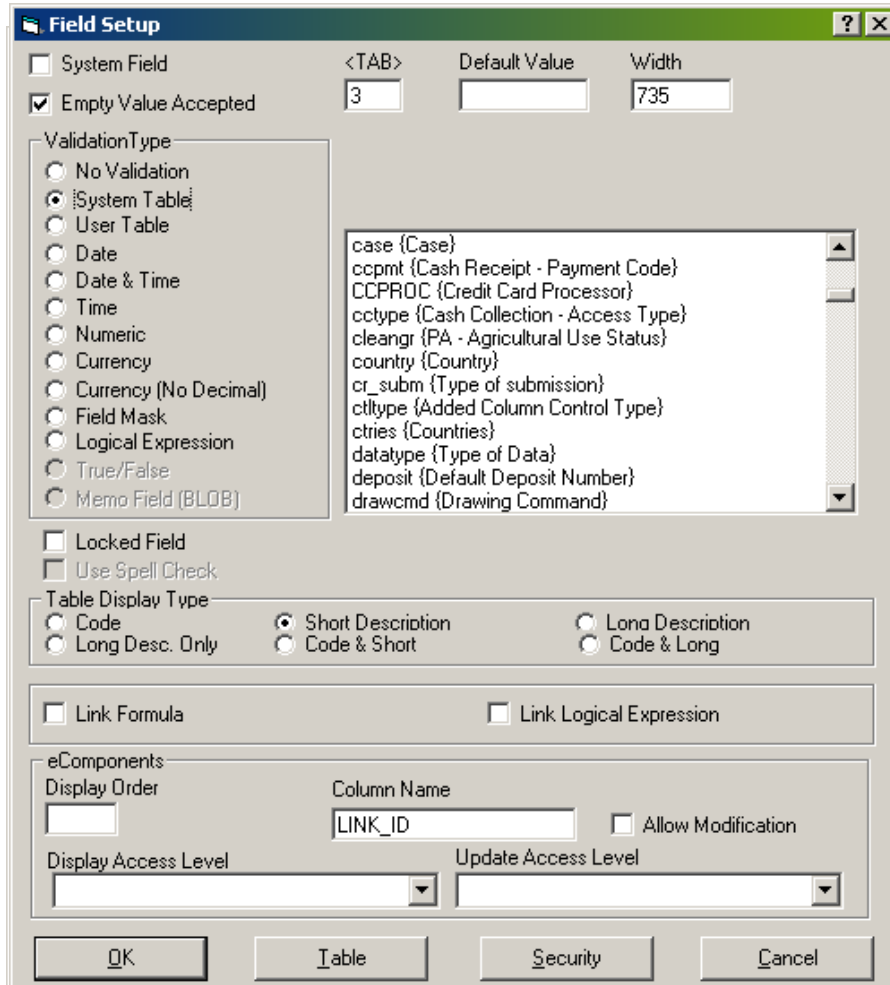
The display characteristic of the *Long Description Only* parameter is different from that of the drop down menu. When the user clicks into the parameter, a window will open to present the list of items that can then be selected with a click.

> **For example**: You can use the **Long Description Only** to ensure that the country is entered consistently on all name and address records. First, create a link to the system validation table, VT_SY_CTRIES.

To link the **Country** parameter to a system validation table:

1. Launch Govern and select any name and address record.

2. Open the *Name and Address Maintenance* function.

3. Select *Setup* > **Field Setup Mode**, from the Govern menu bar.

![MSGovern logo]

4. Select **System Table** under **Validation Type**.

5. Select **ctries {Countries}** from the list of system tables on the right.

> **Note:** Be sure to select **ctries {Countries}** and not **country {Country}**.

6. Select **Long Descr. Only** from the **Table Display Type**.

> **Tip:** Enter the name of the country that will be entered in the majority of records in the **Default Value** parameter.

7. Click **OK** on the *Field Setup* form.

8. Select **Setup** > **Cancel Field Setup Mode**, from the Govern menu bar.

Now, when you enter the **Country**, for a new name and address record, the *Validation Code Browse* screen appears.

9. Select a country and click **OK** on this screen.

Note: This procedure updates new records only. Execute an SQL query to change previously created records.

Link Formula / Link Logical Expression: Select one of these options to link a formula or logical expression to an existing field. The field may be defined as another validation type. For example, the field can be both a date field and linked to a logical expression.

1. Select the option on the *Field Setup Mode* form:
   • Link Formula
   • Link Logical Expression
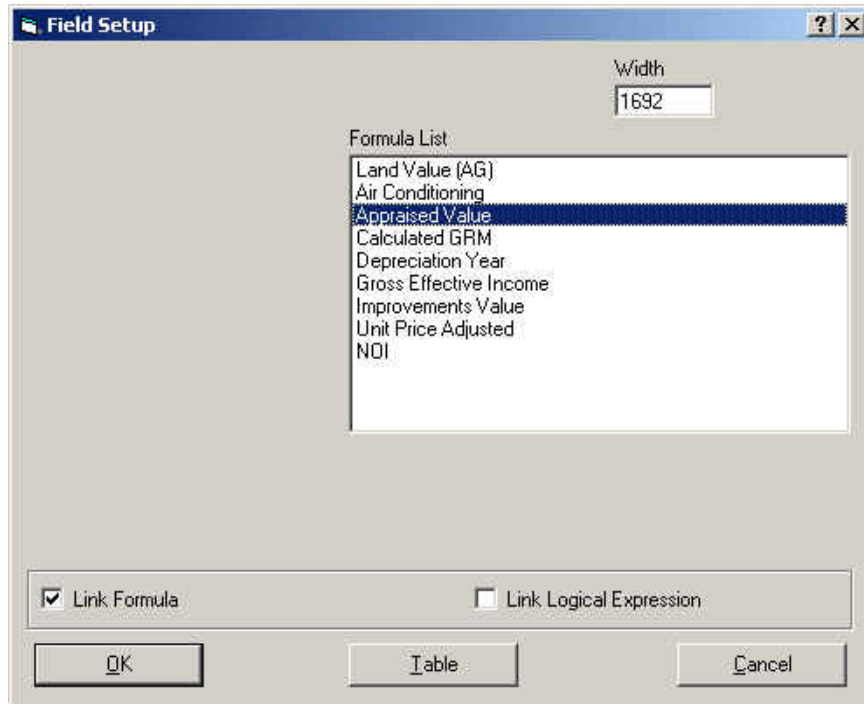
2. Select the formula from the list box.

3. Click **OK**.

> **Note:** You need to create the formula or logical expression through the *Formula Editor* or *Logical Expression Block Editor*. *See Formula Editor on page 183 and Logical Expression Block Editor on page 191 for details.*

Executing Formulas and Logical Expressions

> **Note:** When executing formulas and logical expressions that include keywords or database columns, all the applicable functions need to be open.
>
> Alternately, you can add a *Selection Query* to the formula or logical expression, in order to retrieve values from database fields. *See Selection Queries on page 216.*

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Field Setup User/Group Access Security

There are multiple levels of security that can be applied to a function. It is possible to secure specific fields within a function form and limit access to existing Users and Groups.

To set *User / Group Access* security:

1. In Govern, open the function you want to edit.
2. Select *Setup* > **Field Setup Mode**.
3. Double-click on the field to edit. This opens the *Field Setup* form.
4. Select **Security** at the bottom of the form.
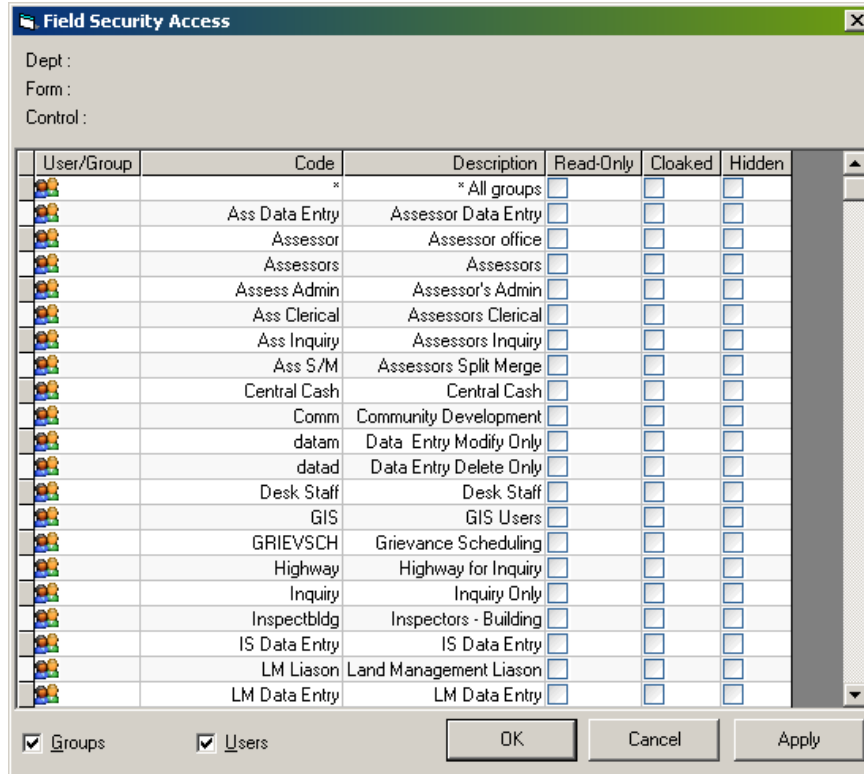
There are three (3) levels of security:

readonly: The field is visible on the form but the data can not be modified

cloaked: The field is visible on the form but the content displays as asterisks (*) i.e. not legible.

hidden: The field does not appear on the form.

By default all users and groups will have full access to all fields of the form. Full access is an indication that the field is visible on the form and the data can be modified.

To set security access to a selected field:

1. In Govern, open the function form you want to edit.

2. Select *Setup* > **Field Setup Mode**.

3. Double-click on the field to edit. This opens the *Field Setup* form.

4. Click **Security** at the bottom of the form.

5. At the *User / Group Security* form, select *Groups* or *Users* or both to indicate the users that will be restricted.

6. Select the required security.

7. Click **Apply** to apply the selection.

8. Click **OK**

New Database Field Creation

📖 Overview

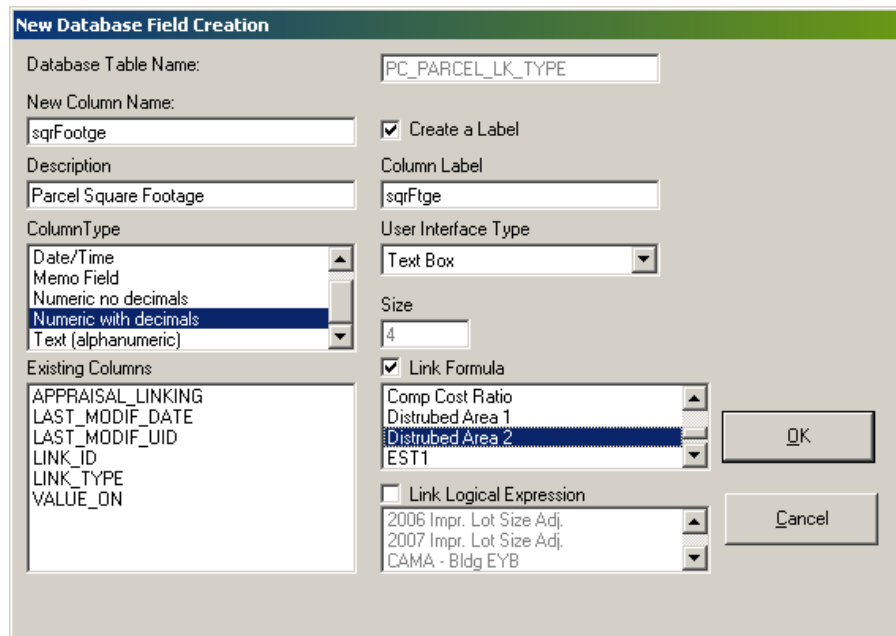The *New Database Field Creation* form is used for creating and adding customized fields to the Govern functions.

To access this form:

1. Launch Govern.

2. Open the function you are modifying.

3. Select the tab where you are adding the new field.

4. Select *Setup* > **New Database Columns**.

When you are in this mode, **NEW FIELD SETUP** NEW FIELD SETUP appears on the lower left hand side of the *Status Bar*.

> **Note:** Since there is a limit of 256 columns for each database table, the number of fields you can add is equal to 256 minus the number of fields already existing in the table.
>
> User-defined fields can be removed from the function, in *Object Dragging Mode*, but cannot be removed from the database.

Database Table Name: This field displays the name of the database table to which your new fields will be added. It cannot be edited.

In addition to the database table displayed, information on the new field is added to the following tables:

- USR_ADDED_FIELDS: Name of the field
- USR_FIELDS_LABEL: Label of the field
- USR_FIELDS_DEF: Position of the field

New Column Name: Enter a name for the field you are creating. This name must be unique within the database table. Verify the list of existing fields to ensure it does not already exist.

> **Note:** The unique part of the name must occur within the first 11 characters.

Description: Enter a description. This appears in the system dictionary and on the *Browsing* screens (Table: SY_DICT_DESC).

Create a Label: Select this option if you are adding a label to the field.
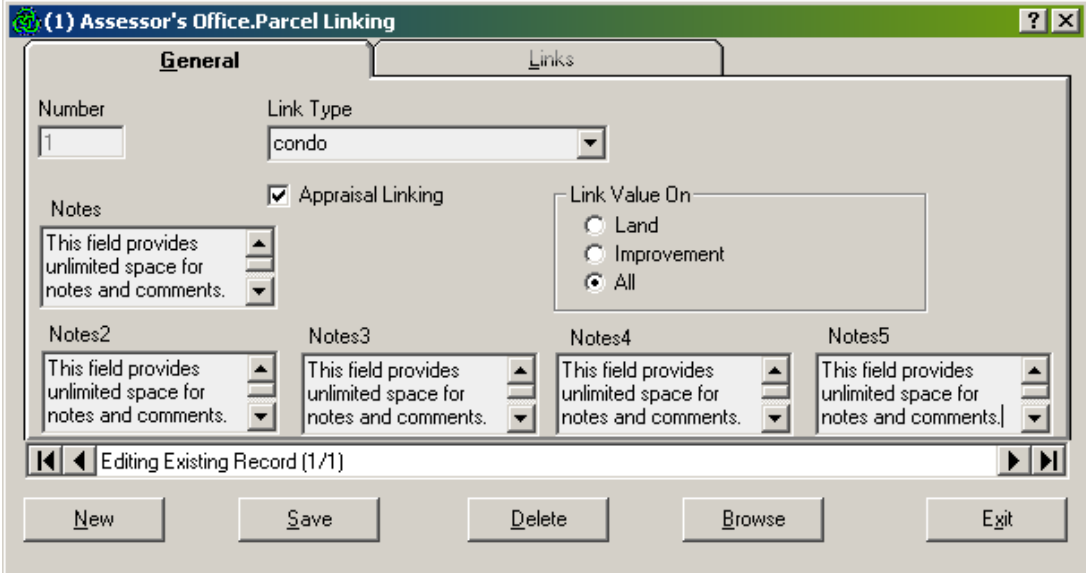
Column Label: Enter the text to appear on the label.

User Interface Type: Select a *User Interface Type*:

- text box
- combo box
- option box

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Column Type: If you select **Text Box** in the **User Interface Type** field, you need to select one of the following column types:

Column Type	Description
Currency	Select this option to apply a currency field, formatted as defined in your Windows environment, to the field.
Date	Select this option to apply a date field, formatted as specified on the *Registry Information* table, in Updata, or as defined in your Windows environment (if you are using Microsoft® Access®). If you enter **$date** in the default value field, the current date is displayed.
Time	Select this option to apply a time field, formatted as specified on the *Registry Information* table, in Updata, or as defined in your Windows environment (if you are using Microsoft® Access®). If you enter **$time** in the default value field, the current time will be displayed.
Numeric (no decimals)	Select this option to apply a numeric field: No decimals, letters or special characters will be accepted.
Numeric (with decimals)	Select this option to apply a numeric field with decimals: No letters or special characters will be accepted.
Memo Field	Select this option to apply a memo field, for notes and comments, to the function. You can add multiple memo fields to most user functions in Govern, as displayed on the following screen shot. Each of these fields provides unlimited space for notes and comments.

Size: Enter the size of the field if this is not entered automatically.

> **Note:** You cannot specify a default size for a memo field; however, you can change the size, after the field is added to the form, using *Field Setup Mode. See Field Setup Mode on page 237 for details*.

Link Formula: To associate a formula with the field, select **Link Formula**; then, select the formula from the list box.

Link Logical Expression: To associate a logical expression with the field, select **Link Logical Expression**; then, select the logical expression from the list box.

> **Note:** You need to create the formulas and logical expressions, beforehand, using the Formula Editor or the Logical Expression Editor. *See Formula Editor on page 183 and Logical Expression Block Editor on page 191 for details*.

OK: Click **OK** to add your new field to the function. It is added to the top left corner of the function.

Repositioning the Field

Next, you need to reposition your new field using *Object Dragging Mode.* This mode is automatically selected, when the new field is created.

1. Reposition the new field and label by dragging them with your mouse.

2. Select **Setup** > **Cancel Object Dragging Mode** from the Govern menu.
   See Object Dragging Mode on page 235 for full details on this mode.

> **Note:** If you are using **Windows 95 / 98** or **Millennium**, it is highly recommended that you limit the number of columns you create. The more columns you add, the fewer computer resources you have available. The drop-down list uses the most resources, then the text box. The option box uses the least. Keep this in mind, for the performance of your computer may be severely affected.

Executing Formulas and Logical Expressions

> **Note:** When executing formulas and logical expressions that include keywords or database columns, all the applicable functions need to be open.
>
> Alternately, you can add a *Selection Query* to the formula or logical expression, in order to retrieve values from database fields. *See Selection Queries on page 216*.
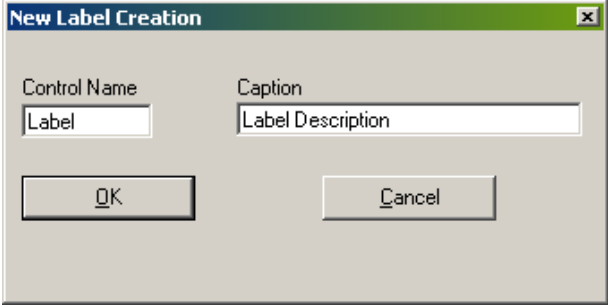
New Labels

📖 Overview

The *New Labels* function is used to add a caption on a function.

To access this function, open the form you are modifying in Govern and select *Setup* > **New Labels**.

Saving a New Label: Click **OK** you to save a new label.

Control Name: Enter the new control name.

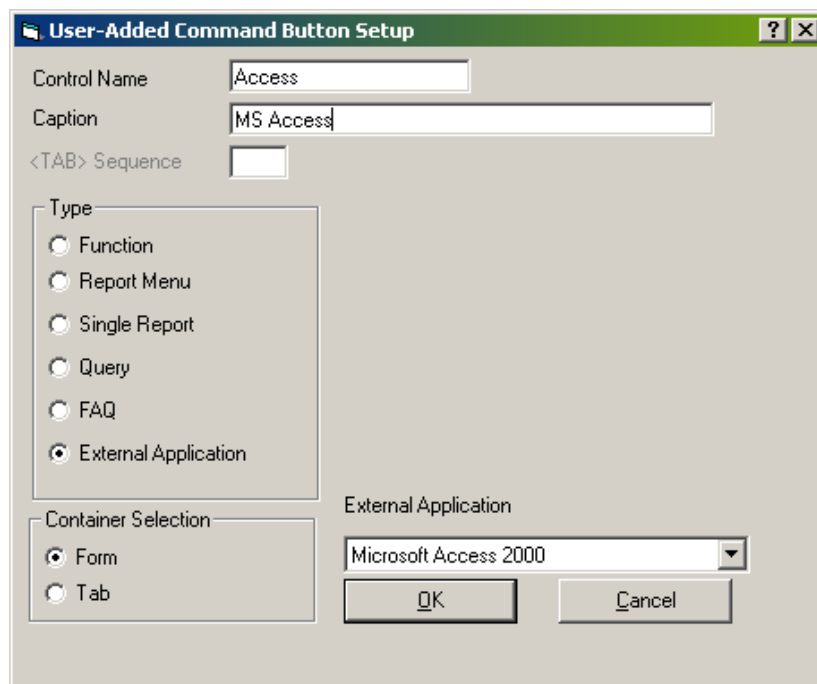**Caption:** Enter the name to display on the label.

New Command Buttons

📖 Overview

Use the *New Command Buttons* option to add customized command buttons to a function. From these command buttons, you can launch another function; open a report; run a query; view or modify an FAQ or launch an external application.

To access this option, open the function you are modifying in Govern and select *Setup* > **New Command Buttons...**

Control Name: Enter a name to be saved to the *Control* file. You cannot use spaces in this name.

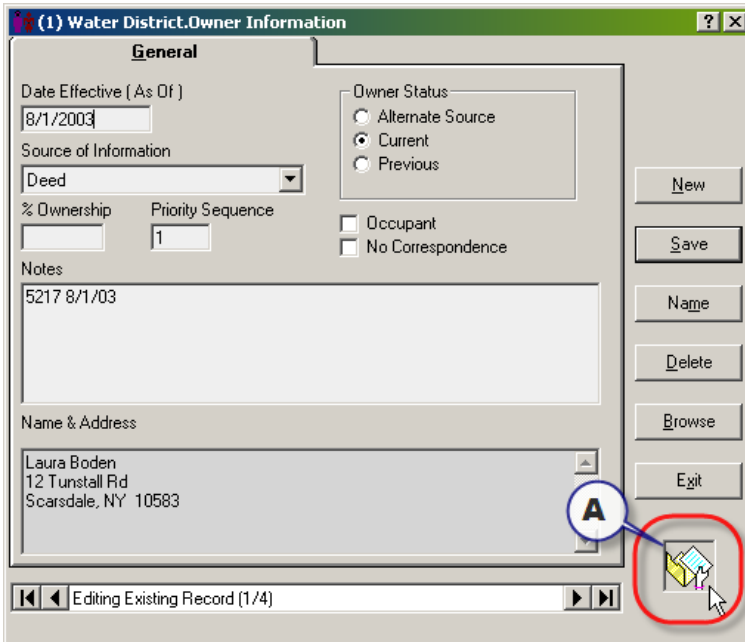**Caption:** Enter the text that will identify the button.

Tab Sequence: Enter the sequence number for the Tab function.

Type: From a new command button, you can launch another function, open a report, run a query, view or modify an FAQ or launch an external application.

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- Function
- Report Menu
- Single Report
- Query
- FAQ
- External Application

Linking a Function to a New Command Button

Select **Function** to call a function from the new command button. This facilitates navigation to another form; for example, if you frequently use the *Additional Name Information* function when completing the *Owner Information* form, create a link. The Govern User can launch the *Additional Name*

Information function by clicking the icon ![icon] , as displayed on the following

screen shot.

To create a link to a function:

1. In Govern, click *Setup* > **New Command Buttons**.

2. Select **Function** in the **Type** section of the *User Added Command Button Setup* form.

3. Select the function you want to call from the **Functions List** text box.

4. Enter a *Control Name.* You cannot use spaces in this name.

5. Enter a Caption. This appears on the button, unless you are creating the button as an icon.

6. Under **Container Selection**, select **Form** to add the new button to the form section or **Tab** to add the button to the tab section. For example, in the preceding screen shot, the *Additional Name Information* icon has been added to the Tab section and the Report button has been added to the Form section.

7. Select **Create as an Icon** to use the function icon as the command button.

8. Click **OK**. A message appears stating that the button has been successfully created.

9. Click **OK** on this message box. The New Command Button is added to the top left corner of the current form. Move the button to your preferred location by dragging it with the mouse as described under *Object Dragging Mode on page 235.*

10. You can then create a link from the linked function back to the calling function. This function is similar to the **Back** button of your web browser and can be very useful.

To create a link back to the calling function:

1. Launch the linked function.

2. Follow the above procedure but in set 2, select **Link back to calling function**.
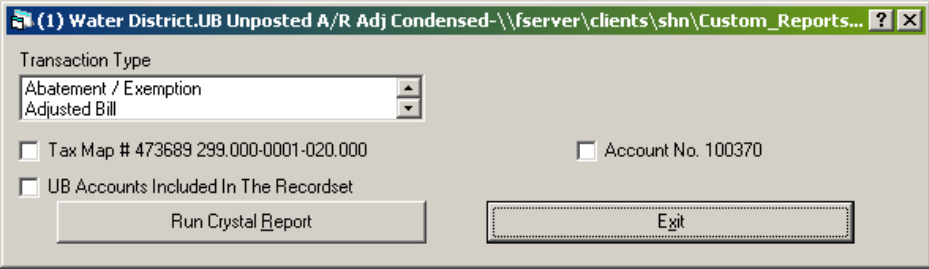
Linking Reports to a New Command Button

There are two options for adding reports to a function:

• **Single Report** to open a single report in **Quick Open Mode**.
• **Report Menu** to display a list of the reports that are linked to the function.
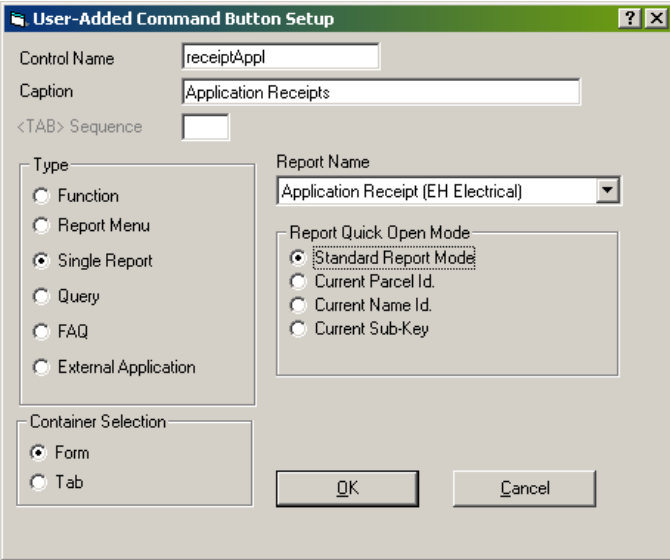
Adding a Single Report

You can define the parameters to display in the setup for the single report. The report is run directly from the selected function without displaying a prompt similar to the following.

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Note: For the Quick Open Mode, you can run the reports that contain only the General and Recommended Formulas as listed under *Report Function Setup: Formulas on page 153*. If the report contains Read-only or Conditional formulas, you need to displays the prompt.

To add a single report to your function:

1. In Govern, click *Setup* > **New Command Buttons**.

2. Select **Single Report** under the **Type** section of the *User Added Command Button Setup* form.

3. Enter a *Control Name*. You cannot use spaces in this name.

4. Enter a *Caption*. This appears on the button, unless you are creating the button as an icon.

5. Under **Container Selection**, select **Form** to add the new button to the form section or **Tab** to add the button to the tab section.

6. Under **Report Name**, select the report.

7. Under **Report Quick Open Mode**, select one of the following:
   - **Standard Report Mode** to open the report by its standard parameters.
   - **Current Parcel ID** to display data on the current parcel only.
   - **Current Name ID** to display data on the current name only.
   - **Current Sub-key** to display data on the current sub-key, such as a permit ID or building ID, depending on the open function.

8. Click **OK**.

Adding a Report Menu

To create a new command button that opens a report from the current function:

1. In Govern, click *Setup* > **New Command Buttons**.

2. Select **Report Menu** in the **Type** section of the *User Added Command Button Setup* form. The **Reports List** text box opens displaying the reports that have been linked to the current function, through the **Report Functions Setup** form in Govern Admin. *See Lists & Crystal Reports Setup on page 140*.
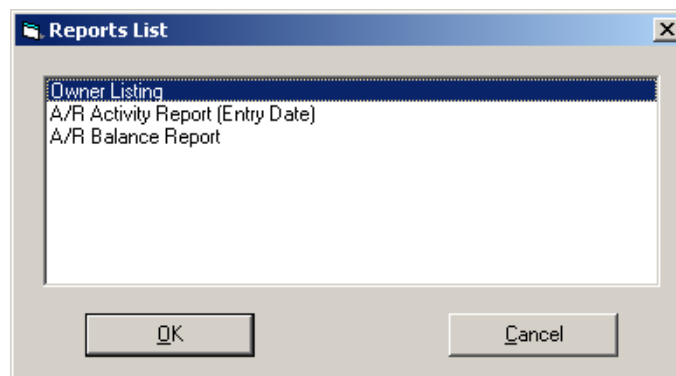
3. Highlight the report you want to link and click **OK**.

Note: You need to repeat this procedure for each report you are linking.

4. Enter a *Control Name*. You cannot use spaces in this name.

5. Enter a *Caption*. This appears on the button, unless you are creating the button as an icon.

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6. Under **Container Selection**, select **Form** to add the new button to the form section or **Tab** to add the button to the tab section. For example, in the preceding screen shot, the *Additional Name Information* icon has been added to the Tab section and the Report button has been added to the Form section.

7. Click **OK**. A message appears stating that the button has been successfully created.

8. Click **OK** on this message box. The new command button is added to the top left corner of the current form. Move the button to your preferred location by dragging it with the mouse as described under *Object Dragging Mode on page 233*.

Linking Queries to a New Command Button

Just as you can link an action query to the **Add**, **Save** and **Delete** buttons on a function, you can link a query to a new command button. The query performs some action, such as updating records, adding records to a table or deleting records from a table and is executed each time the user selects the button. *See Functions Setup on page 123 for information on linking queries to the existing command buttons.*

The queries need to be created and saved through the *User Defined Queries Setup* form in Govern Admin. *See SQL Queries on page 211.*

To execute a query from a new command button:

1. In Govern, select *Setup* > **New Command Buttons**.

2. Select **Query** under the **Type** section of the *User Added Command Button Setup* function.

3. Enter a Control Name. You cannot use spaces in this name.

4. Enter a Caption. This appears on the button, unless you are creating the button as an icon.

5. Under **Container Selection**, select **Form** to add the new button to the form section or **Tab** to add the button to the tab section. For example, in the preceding screen shot, the *Additional Name Information* icon has been added to the Tab section and the Report button has been added to the Form section.

6. Select the *Query* you are linking to the command button

> **Note:** Only Action Queries appear in the **Query Name** drop-down list. The queries need to be predefined and saved through the *SQL Definition Setup* form. *See SQL Queries on page 211 for details.*

7. Click **OK**. A message appears stating that the button has been successfully created.

8. Click **OK** on this message box. The *New Command Button* is added to the top left corner of the current form. Move the button to your preferred location by dragging it with the mouse as described under *Object Dragging Mode on page 235.*
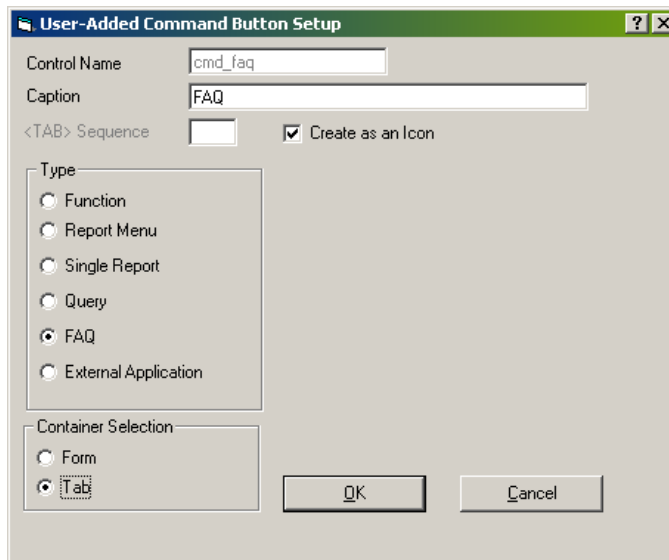
FAQ

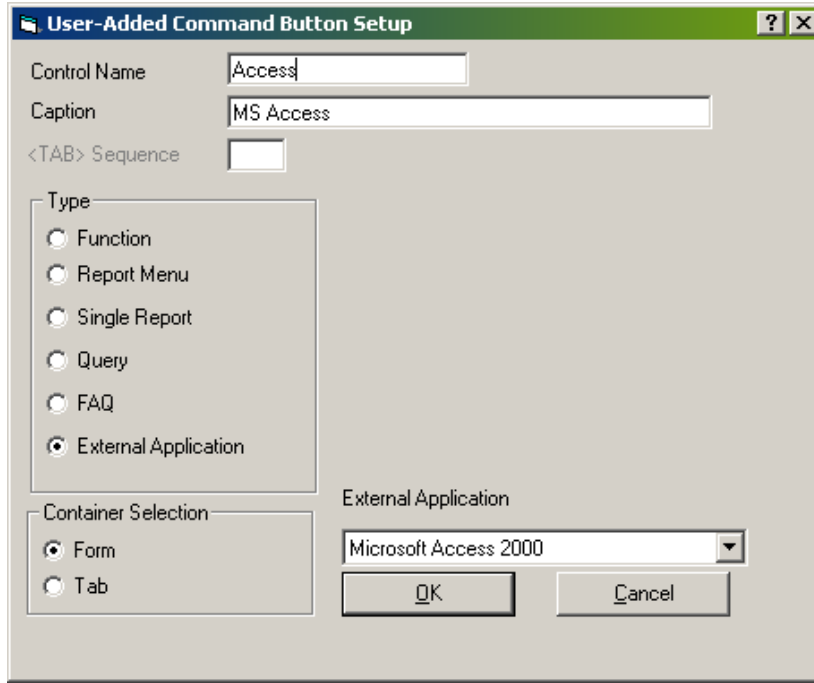Select **FAQ** to add a *Frequently Asked Questions (FAQ)* button or icon to the current form. Users with full access rights can add notes and comments that can be viewed by all the users within the department or within the organization depending on the setup.

> **Note:** Your FAQ is limited to the department if the **FAQ buttons by department** option is selected on the *System Registry Maintenance* form in Govern. Otherwise, it can be viewed throughout the organization.

To create a new command button that opens a department FAQ text box:

1. In Govern, click **Setup** > **New Command Buttons**.

2. Select **FAQ** under the **Type** section of the *User Added Command Button Setup* function.

3. The control name cmd_faq appears automatically in the **Control Name** field.

4. Enter a *Caption*. This appears on the button, unless you are creating the button as an icon.

5. Under **Container Selection**, select **Form** to add the new button to the form section or **Tab** to add the button to the tab section. For example, in the preceding screen shot, the *Additional Name Information* icon has been

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added to the **Tab** section and the **Report** button has been added to the Form section.

6. Select **Create as an Icon** to use the FAQ icon as the command button

    .

7. Click **OK**. A message appears stating that the button has been successfully created.

8. Click **OK** on this message box. The New Command Button is added to the top left corner of the current form. Move the button to your preferred location by dragging it with the mouse as described under *Object Dragging Mode on page 235.*

External Application

Select **External Application** to add a command button than launches an External Application, directly from the current form.

> **Note:** Before adding the application to a command button, you need to configure it for use in Govern, through the *External Application Setup* form. *See External Application Setup on page 178.*
>
> Once configured, the application is added to the Govern **Tools** menu.

To create a new command button that launches an external application:

1. In Govern, click *Setup* > **New Command Buttons**.

2. Select **External Application** in the **Type** section of the *User Added Command Button Setup* function.

3. Enter a control name in the **Control Name** field. This is saved to the *Control* file. The name cannot contain spaces.

4. Enter a *Caption*. This appears on the button.

5. Under **Container Selection**, select **Form** to add the new button to the form section or **Tab** to add the button to the tab section.

6. Select the application from the **External Application** drop-down list.

7. Click **OK**. A message appears stating that the button has been successfully created.

8. Click **OK** on this message box. The N*ew Command Button* is added to the top left corner of the current form. Move the button to your preferred location by dragging it with the mouse as described under *Object Dragging Mode on page 235*.

Global and Department Messages up to 1000 Characters Maximum

The *Text Message* field in the *Global and Department* message parameters now allows for messages that are up to 1000 characters long. This additional space allows for more descriptive text messages.

> **Note:** The space character is included in the character count of 1000.

To create new *Global and Department* messages..

In *Govern for Windows*...

1. Open a record.

2. Select *Edit* > **Global Flag / Department Flag**
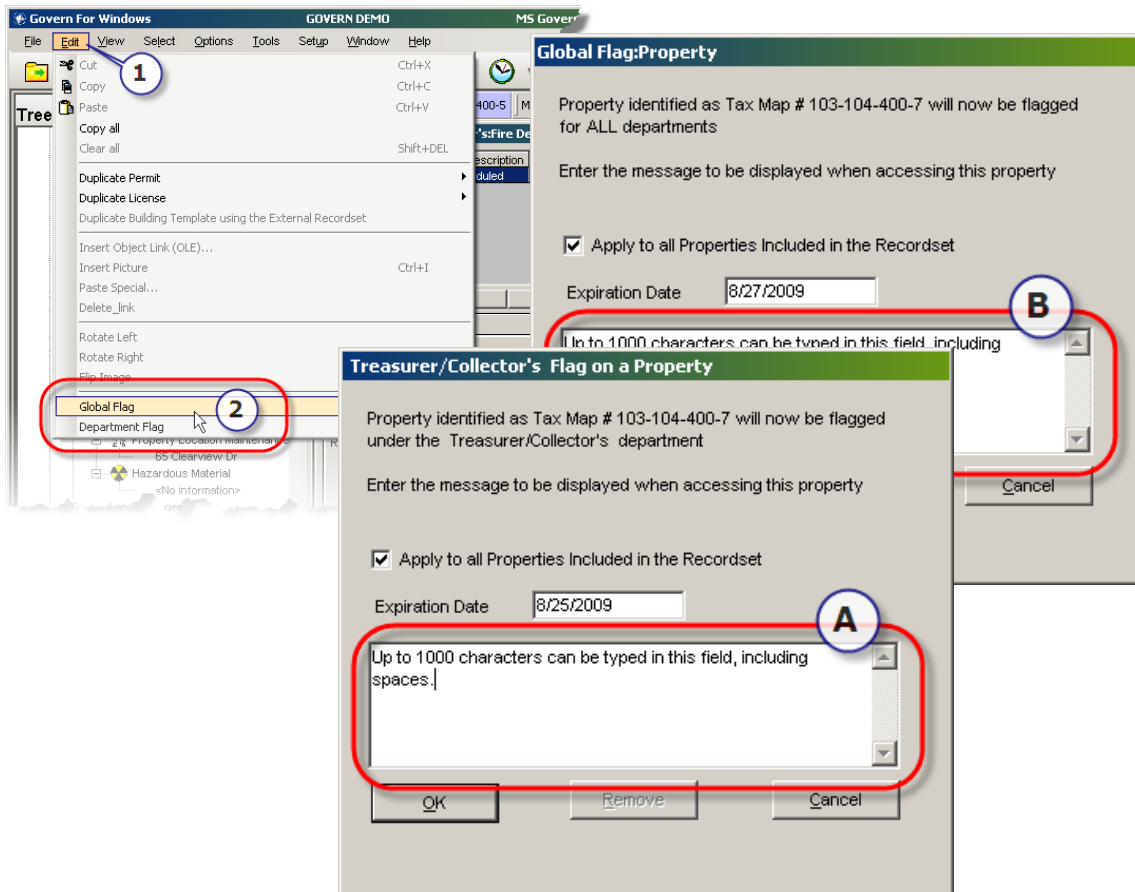
These are the global or department messages that could be attached to a P_ID. When configured, these messages will display when the record is accessed.

Note: When entering your message, the system will allow you to enter more than 1000 characters. Only 1000 characters will be displayed in the message window. When the message exceeds the 1000 character count, it can be displayed when a report is generated, or by viewing the table directly as an administrator.

Additional Form Dividers
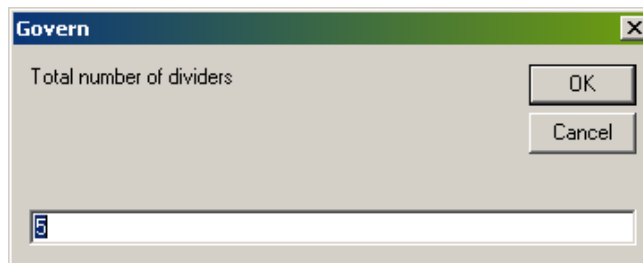
📖 Overview

The **Additional Form Dividers** function is used to add additional tabs or *dividers* to a Govern function.

> **Note:** This function is not available for all forms.

To access this function:

Open the form you are modifying in Govern and select *Setup* > **Additional Form Dividers**.

Total Number of Dividers: Enter the total number of dividers, including those already present on the form.

> **Note:** The original dividers cannot be removed. You can only remove user-added dividers.

Saving a Form Divider Addition: Click **OK**. The new information is saved to the SY_FORM_SIZE system table.

Once you create the additional dividers, you can add new fields. *See New Database Field Creation on page 251 and Field Setup Mode on page 237 for details.*

Reset Custom Form Layout

📖 Overview

This function allows you to reset the form to the original design (before adding any fields or labels, or before modifying the location of existing fields).

> **Note:** All the added fields will be placed in the top left corner of the from, in position 0, 0.

To access this function:

Open the form you are modifying in Govern and select **Setup** > **Reset Custom Form Layout**.
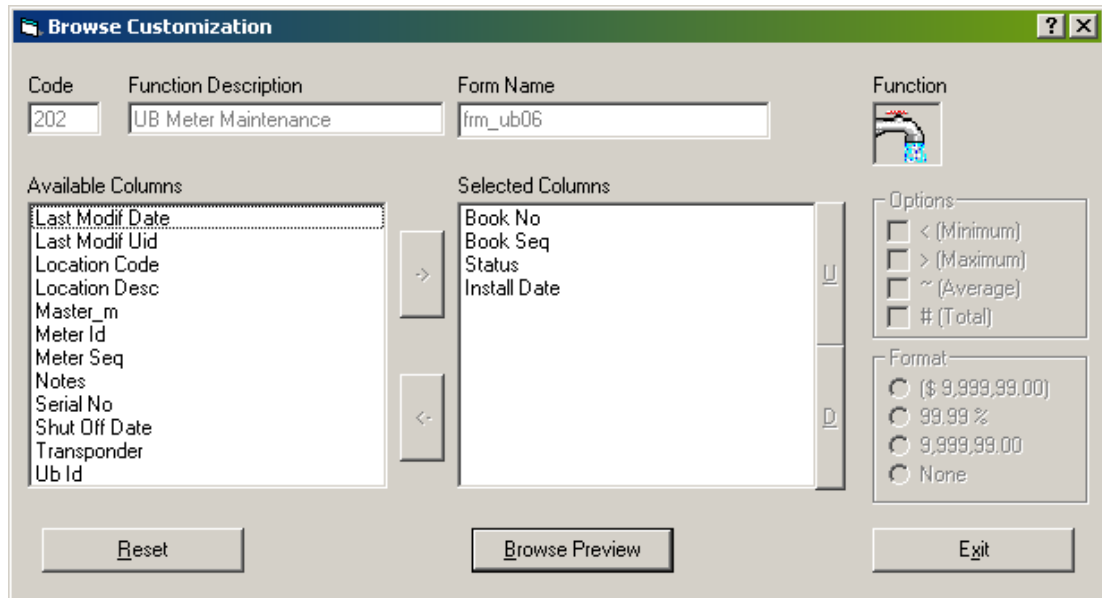
Browse Setup

📖 Overview

Use the *Browse Setup* form to select the field(s) you want to display on the *Browsing* screen for the selected function. For numeric fields, you can select a format and display the minimum (<), maximum (>), average (~) or total (#) value. This is displayed in the column header of the applicable field.

The *Browsing* screens automatically expand to the full height and width of your Govern window.

When you are in this mode, BROWSE SETUP appears on the *Status Bar*.

Resetting the Browse Screen with Default Settings: Click **Reset** to reset the *Browsing* screen with the default parameters.

Viewing the Browse Screen (Preview): Click **Browse Preview** to preview the *Browsing* screen before continuing.

Adding a Column on the Browse Screen: Select a column from the *Available Columns* list box and click **->** to move it to the *Selected Columns* list box. The columns will be displayed on the *Browsing* screen in the order listed on this form.

Removing a Column from the Browse Screen: Select a column from the *Selected Columns* list box and then click **<-** to move it to the *Available Columns* list box. The columns displayed in the *Available Columns* list are not displayed on the *Browsing* screen.

Changing the Display Order of the Columns: Highlight a field and click **U** to move it towards the beginning of the list or **D** to move it towards the end. You need to click once for each space you want to move.

> **Note:** Do not move or delete the first field from the Selected Columns list: P_ID, PM_ID, etc.

Code: This field displays the code assigned to the function. This is an internal number.

Function Description: This field displays the long description of the function.

Form Name: This field displays the form number or name. This is displayed in the left corner of your computer screen when the function is open.

Available Columns: This list box displays all the fields in the current function.

Selected Columns: This list box displays the fields that will appear on the *Browsing* screen.

Options: Select these options to display see the minimum, maximum, average or total value for the selected column. If the information is not applicable, the option is disabled.

Format: Select a format for displaying numerical information: ($9,999,99.00) for currency, 99.99% for percentage, 9,999,99.00 for decimal or none for non-formatted values. If the format is not applicable, the option is disabled.

> **Note:** The *Browsing* screens are displayed in the same manner for all users.

Save Current Form Size

📖 Overview

This option allows you to save the new size of the current form if it has been changed. If the form has been made larger, you can then add new fields in the space created by using one of the editing modes. *See Object Dragging Mode on page 235*.
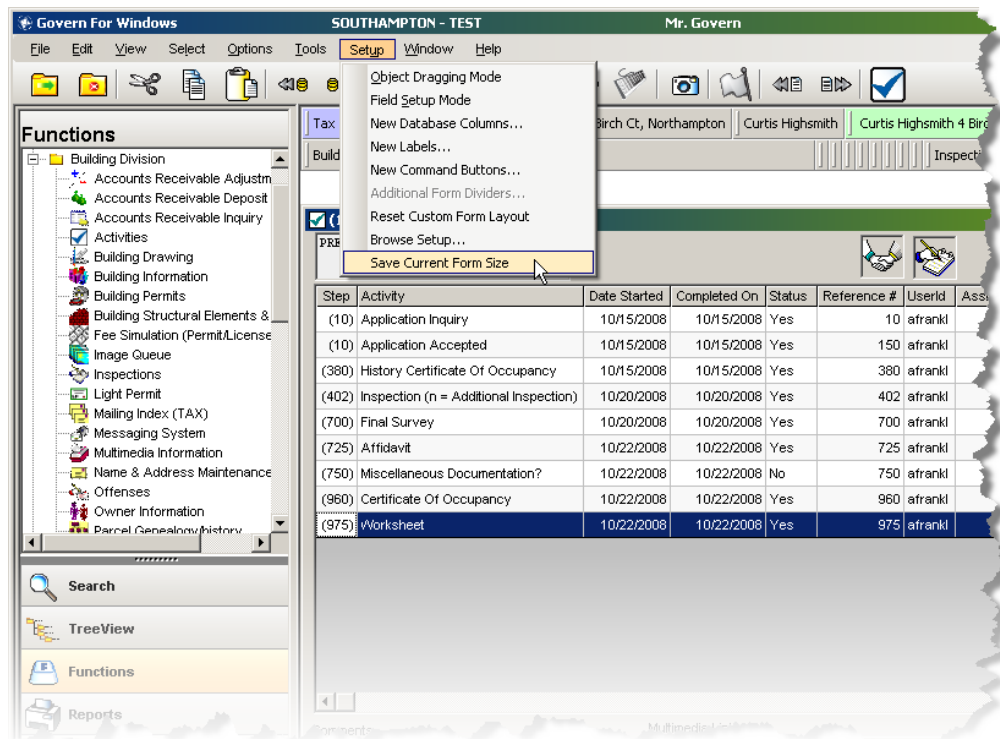
To save the current form size...

Open the form you are modifying in Govern and select *Setup* > **Save Current Form Size**.

The current function size is modified when you select this option.

FINAL DRAFT

CHAPTER 3: BATCH PROCESSING

📖 **Overview**

This section introduces the *Govern Batch Processing* application and default menu options. Detailed descriptions of the processes are provided in the reference guides.
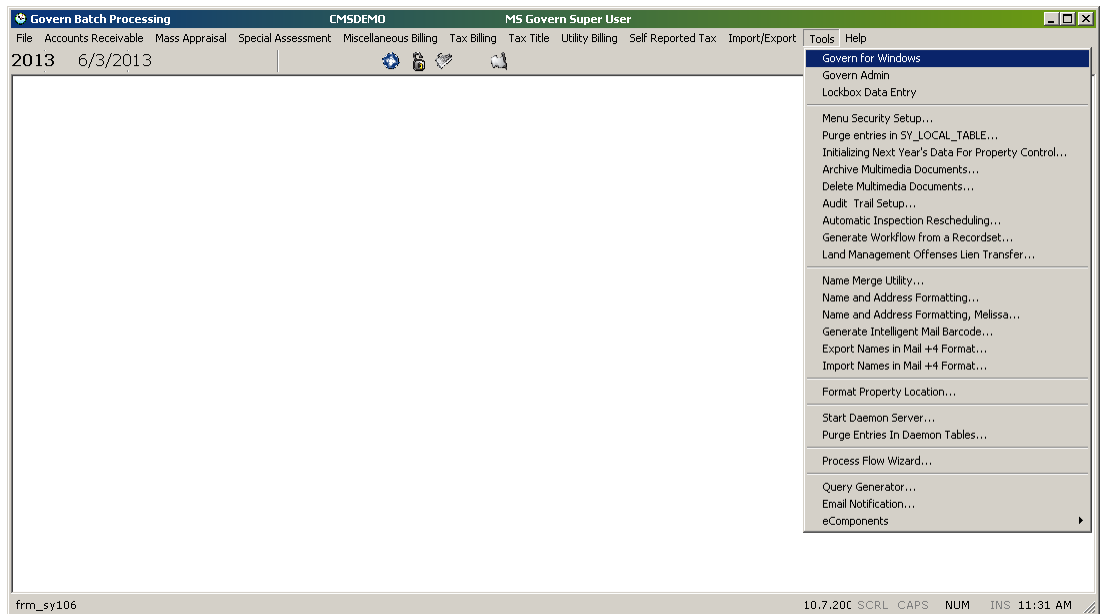
Govern Batch Processing Interface

Toolbar Icons

You can launch *Govern Admin*, *Govern* and the *Payment Lockbox* applications by clicking the icons displayed on the main menu of the *Govern Batch Processing* interface, as well as from the **Tools** menu.

Background

You can change the background of the interfaces for the Govern for Windows applications. For details, *see Govern for Windows Background on page 15*

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MS Govern Batch (.NET) can be called from GovBatch (Govern for Windows Batch)

NEW

The *MS Govern Batch .NET* application can be called from GovBatch release 10.7. This will allow for users of GovBatch to access new *Govern.NET* batch processes.

Note: This functionality is only available to users that have obtained licenses for Govern.NET and have the required applications installed.

To configure the link between *GovBatch* and *MS Govern Batch*:

In *Govern Admin*...

1. Select *Parameters* > **Edit the System Registry...**

2. In the *System Registry Maintenance* form, click the **Connections** tab (**A**).

3. Locate the **DeplyEZ (ClickOnce) Application Batch Shortcut** (**B**) parameter.

4. Enter the UNC path to the Govern.NET Batch application, e.g. \\MYSERVER\Deployments\DEMO_FOO_SQL\MSGOVBATCH\MsGovBatch.exe.application.
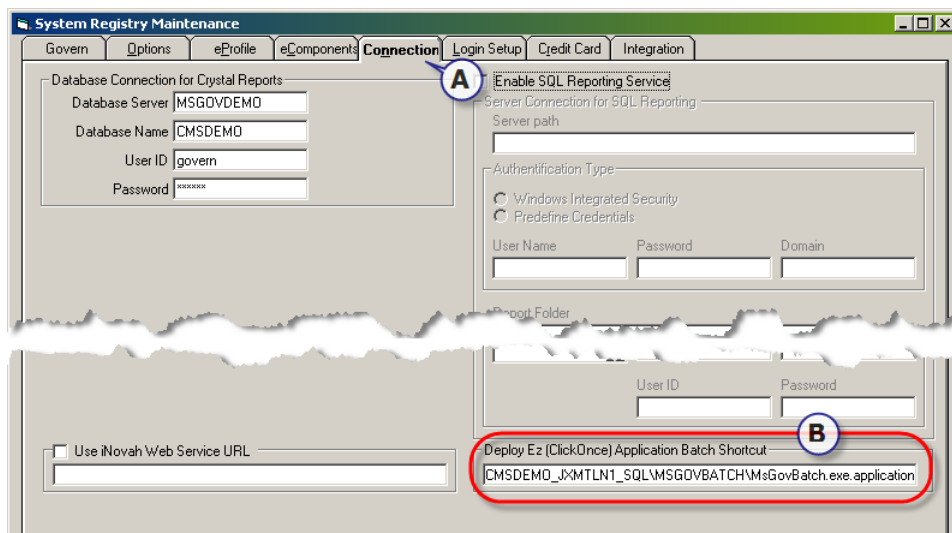
Users with this functionality will be able to select *MS Govern Batch (.NET)* processes that will appear in any of the *GovBatch*, i.e. *Govern for Windows Batch* menus.

General Batch Processing Menus Options

This guide describes the *File*, *Import / Export*, *Tools* and *Help* menus which contain the general menu options available throughout Govern Batch Processing.

All other menu options are displayed by subsystem: Accounts Receivable, Mass Appraisal, Special Assessment, Miscellaneous Billing, Tax Billing, Tax Title and Utility Billing. These menus are available according to the subsystems in your setup. These options are described in the reference guides.

Audit Trail

An Audit Trail is automatically defined for all processes run through *Govern Batch Processing*. Results are saved to USR_AUDIT_BATCH.

File Menu

The Govern Batch Processing *File* menu contains processes for setting the default date and year, for turning off the display of error messages, as well as the Exit command to close the application. All these options are described in this section.

You can also change the default date and year directly from the toolbar. See *File Menu on page 278* for details.

Import / Export Menu

From this menu, the user can import data from the database file, generate an extracted database, export to or import from an inspector's or appraiser's database, or start the General Ledger interface. *See Import / Export Menu on page 282 for details*.

Tools Menu

The Govern Batch Processing Tools menu contains a number of general processes. *See Tools Menu on page 290 for details*.

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Help Menu

The *Help* menu provides links to the *Govern Batch Processing Help* system and to the About Box.

Help System: The Help system describes all the processes. To view the Help on a specific process, scroll through the Table of Contents or launch the process and click F1 on your keyboard. To view context-sensitive Help, right-click on a specific field or command button.

About Box: The version number of the Govern database has been added to the **About** box for quick reference on all applications Govern Admin, Govern and Govern Batch Processing. In addition, the number of licensed users and the number of Inquiry Only users are displayed. *See User Maintenance on page 60 for more details on Inquiry Only access.*

![MSGovern logo]
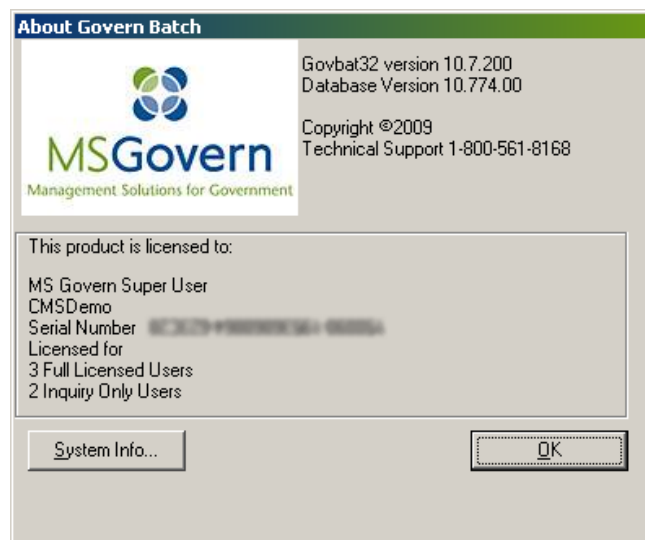
File Menu

📖 Overview

The Govern Batch Processing *File* menu contains processes for setting the default date and year, for turning off the display of error messages, as well as the Exit command to close the application. All these options are described in this section.
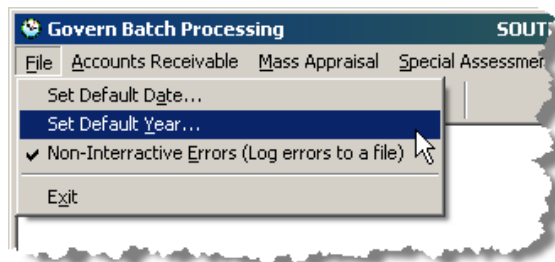
- Setting the Default Year. *See page 278*.
- Setting the Default Date. *See page 279*.
- Turning Off the Display of Error Messages. *See page 280*.
- Exiting Govern's Batch Processing Application. *See page 281*.

Setting the Default Date

The *Default Date* is displayed in the bottom right corner of the screen in Govern, Govern Admin and Govern Batch Processing. By default, this is the default date. However, you can change this for your batch processes, using the default date screen. Double-click in the text box: and select a new default date using the pop-up calendar You can also modify the default date directly in the Text Box. Click **OK** to save and continue.

To access this process, from Govern's main screen, select **Tools** > **Batch Processing (Govbat32.exe)**

OR

Click **Applications** in the *Side Navigation Bar* to display Govern applications; click 🕐 *Govern Batch Processing*.

In Govern Batch, select *File* > **Set Default Date**
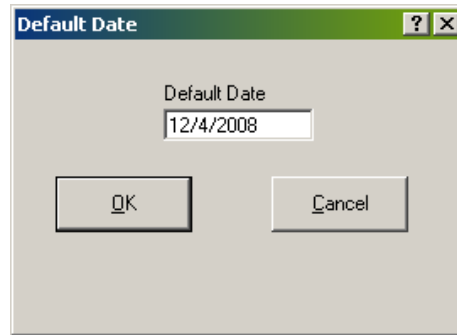
You can also access this screen by clicking on the default date in the Govern toolbar.

Saving a New Default Date: Double-click in the field and select the new default date from the pop-up calendar. Then click **OK** to save.

Click **Cancel** to close the screen without saving your modification.

Setting the Default Year

You can change the Default Year for all the batch processes with this feature.

To access this process, from Govern's main screen, select **Tools** > **Batch Processing (Govbat32.exe)**

OR

Click **Applications** in the *Side Navigation Bar* to display Govern applications; click *Govern Batch Processing*.

In Govern Batch, select **File** > **Set Default Year**
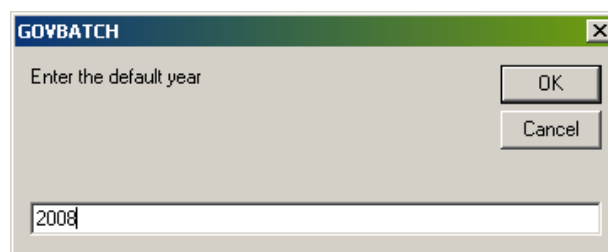
You can also access this screen by clicking on the default year in the Govern toolbar.

Saving a New Default Year: Enter the default year and click **OK** to save.

Click **Cancel** to close the screen without saving your modification.

Turning Off the Display of Error Messages

By default, when errors occur during batch processes, error messages are displayed on your screen. To turn off the display of error messages, select the **Non-interactive Errors (Log Errors to a File)** option.

Processes will continue to run regardless of errors. Errors are saved to the log file, `govbat32.log` located in C:\Documents and Settings\User\Local Settings\Temp\.

> **Note:** This temporary directory is created for every user who logs into the computer.

Deselect this option to display errors during batch processing. When this option is deselected, a confirmation message appears and the user must select an option to continue, when errors occur.

To access this process, from Govern's main screen, select **Tools** > **Batch Processing (Govbat32.exe)**

OR

Click **Applications** in the *Side Navigation Bar* to display Govern applications; click *Govern Batch Processing*.

In Govern Batch, select **File** > **Non-interactive Errors (Log Errors to a File)**
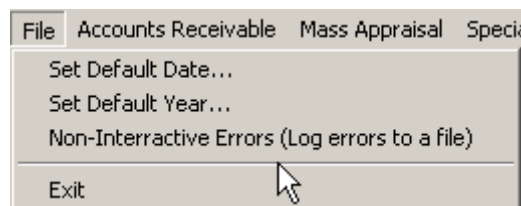
Exiting the Application

Click **File** > **Exit** or **Alt + F**, **X** to close the Govern Batch Processing application.

![MSGovern logo]

Import / Export Menu

📖 Overview

The Govern Batch Processing *Import / Export* menu contains processes for importing and exporting data and extracted databases to and from Govern.
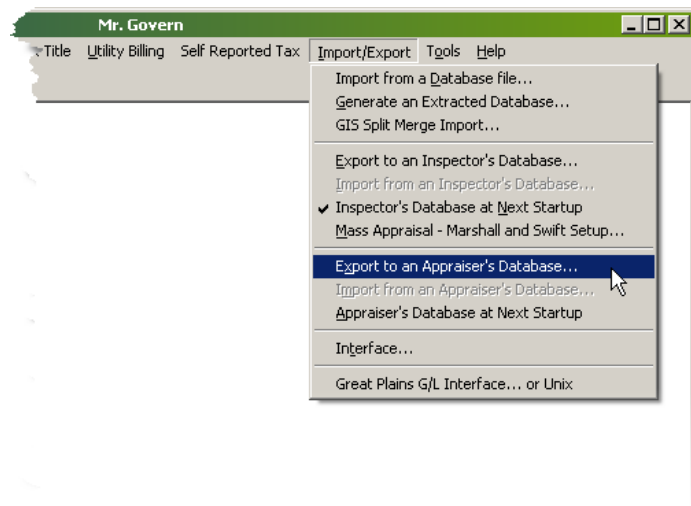
- Importing Data from a Database File. *Refer to the Property Control guide.*
- Generating an Extracted Database. *See page 283.*
- Importing GIS Split / Merge Data to Govern. *Refer to the Property Control guide.*
- Maintaining an Inspector's Database. *Refer to the Permits & Inspections guide.*
- Maintaining an Appraiser's Database. *Refer to the Mass Appraisal General guide.*
- Exporting Data to a G/L Interface. *Refer to the Accounts Receivable guide.*

Importing Data from a Database File

Run the *Import Data from a Database File* process to import data from an external database file to the PC_AREA or PC_LEGAL_INFO database tables. *For details on this process, refer to the Batch section of the Property Control guide.*

Generating an Extracted Database
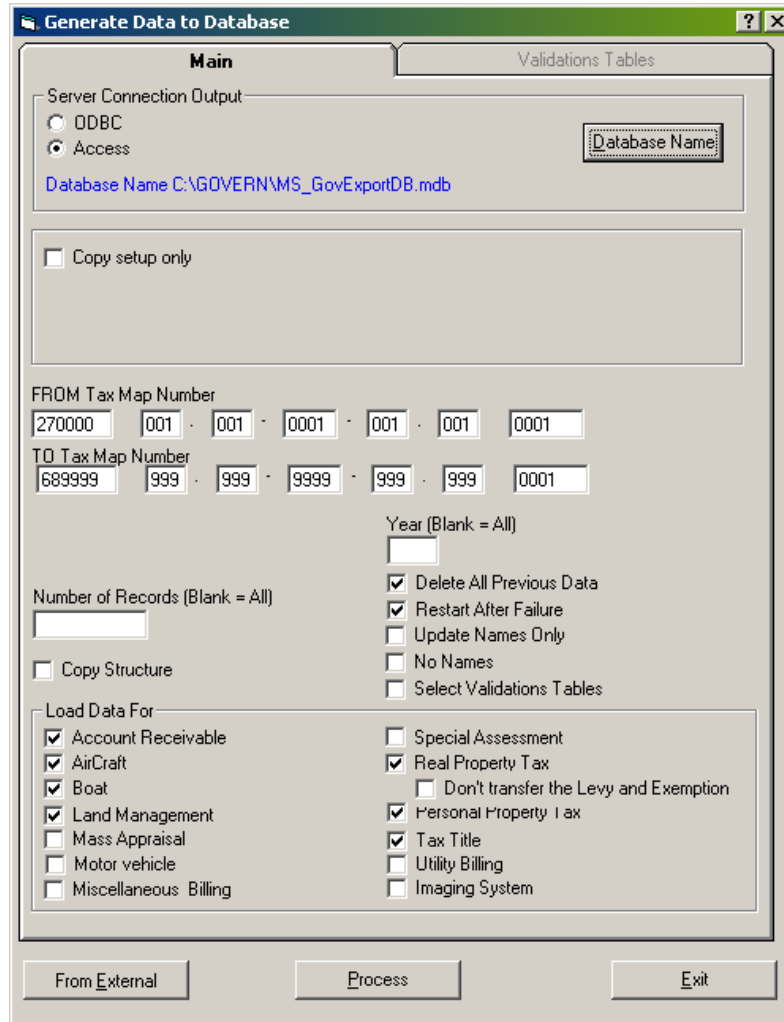
Run the *Generate an Extracted Database* function to create a sample database to be used for performing tests or computations. This sample database can be created from a range of tax map numbers or a jurisdiction. It can be limited further to a year and a number of records. The form varies depending on whether you are using Access or ODBC.

To access this process, from Govern's main screen, select *Tools* > **Batch Processing (Govbat32.exe)**

OR

Click **Applications** in the *Side Navigation Bar* to display Govern applications;

click *Govern Batch Processing.*

In Govern Batch, select *Import/Export* > **Generate an Extracted Database...**

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Generate Data to Database Command Buttons

Process: Click **Process** to launch the data extraction process.

From External: Select From External to export data from the External Recordset only.
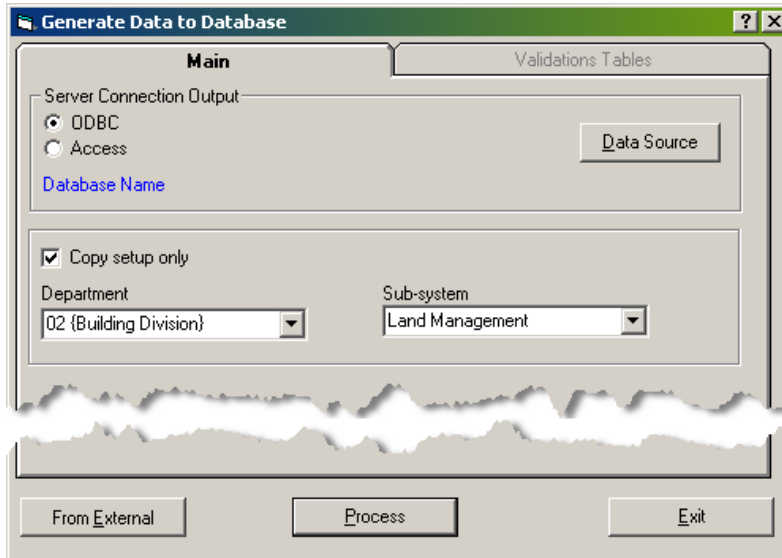
Database Name / Data Source: Click **Database Name** to indicate the Microsoft® Database file name that will be created. if the Option for **ODBC** is selected under *Server Connection Output*, the **Database Name** button will change to **Data Source**.

Generate Data to Database Parameters

ODBC / Access: One option is selected by default. This information is read from the *govern.ini* file.
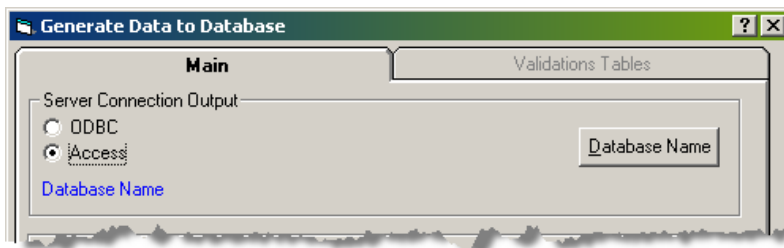
Copy Setup Only: Select *Copy setup only* to make a copy of a setup.

Note: If *Copy setup only* option is selected, all fields below this option will disappear. Two (2) drop down fields will appear directly below this option: and replaced .

Generating an Extracted Access Database

If you are using an Access database, the following information appears at the top of the form:

You need to create a database file name for the extracted data.

Creating the Database File Name: To create a Database file name:

1. Click **Database Name** to open a secondary screen.

2. Navigate to the directory you want to use for the extracted data.

3. Enter a file name.

4. Click **Save**.

Generating an Extracted ODBC Database

If you are using Open Database Connectivity (ODBC), the following information appears at the top of the form:
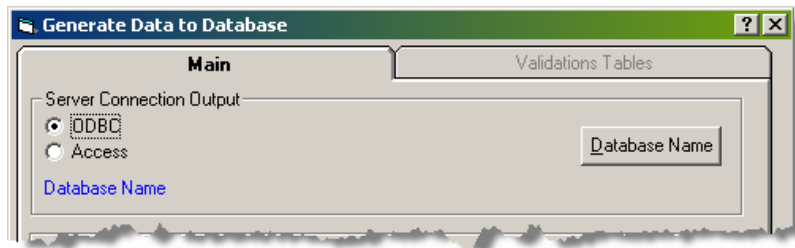
You need to select or create the Data Source Name (DSN) for the extracted data.

> **Note:** If you are using ODBC, you can also create an extracted Access Database. See *Generating an Extracted Access Database on page 285* for details.

Selecting the DSN: To select a DSN:

1. Click **Data Source** to open a secondary screen.

2. Select File Data Source if you are using a file DSN or Machine Data Source if you are using a system or user DSN.

3. Navigate to the directory where the DSN is saved and select the name or create a new DSN and enter the name.

4. Click **OK**.

> **Note:** Refer to the online ODBC Help for further details.

From / To Tax Map Number: Enter the range of Tax Map Numbers for the data extraction. Otherwise, to include all properties in the extraction, leave these fields blank.

Jurisdiction: To include data from a single jurisdiction only, select the jurisdiction, from the drop-down list. Otherwise, leave this field blank.

Year: To include data from a single year only, enter the year in the text box. Otherwise, leave this field blank.

Number of Records (empty = all): Enter the number of records you wish to retrieve from the boundary Tax Map Numbers entered.

Delete all Previous Data: If selected, this option will delete all previously extracted data from the database name you have selected. Otherwise, the data extracted is added to the database. Be careful not to duplicate the data.

Restart After Failure: Select this option to automatically restart the process after a system failure or time-out.

No Names: Select the **No Names** option to exclude the following tables from the export:

- All tables beginning with NA_, such as:
  - NA_NAMES
  - NA_MAILING_INDEX
  - NA_ACH_INFO
  - NA_EXEMPTIONS
- MA_APPRAISERS
- MA_SALES
- PC_GRANTEE
- PC_GRANTOR
- PC_LIEN_NAME
- PC_OCCUPANT
- PC_OWNER
- PC_SALES

Load Data For: The process loads data from the Property Control and Name & Address system tables, as well as all validation tables. To load additional data, select the applicable subsystems.

Importing GIS Split / Merge Data to Govern

Run the *GIS Split / Merge Import* batch process to import parcel split / merge-data from an external Geographic Information System (GIS) application into Govern. *Refer to the Property Control guide for details on this process.*

Maintaining an Inspector's Database

The following batch processes are required for setting up a database that can be used by an inspector, while working on site, away from the office and for synchronizing data between the exported database and the main network database:

• Export to an Inspector's Database
• Import from an Inspector's Database
• Inspector's Database at Next Startup

For details on these processes, refer to the Batch section of the Permits and Inspections guide. For details on configuring a laptop computer to use Govern off site, refer to the Getting Started guide.

Maintaining an Appraiser's Database

The following batch processes are required for setting up a database that can be used by an appraiser, while working on site, away from the office and for synchronizing data between the exported database and the main network database:

• Export to an Appraiser's Database
• Import from an Appraiser's Database
• Appraiser's Database at Next Startup

For details on these processes, refer to the Batch section of the Mass Appraisal General guide. For details on configuring a laptop computer to use Govern off site, refer to the Getting Started guide.

Exporting Data to a G/L Interface

The *Export Data to a G/L Interface* batch process is used to transfer the General Ledger data for use in an external G/L system. The following G/L interfaces are supported:

- Govern Unix
- ACS
- Great Plains
- Lawson
- S.F.G.
- Cayenta

Refer to the Batch section in the Accounts Receivable guide for details on the batch processes and to the Appendix for the file layout for each type of interface.

Tools Menu

📖 Overview

The Govern Batch Processing *Tools* menu contains the following processes.
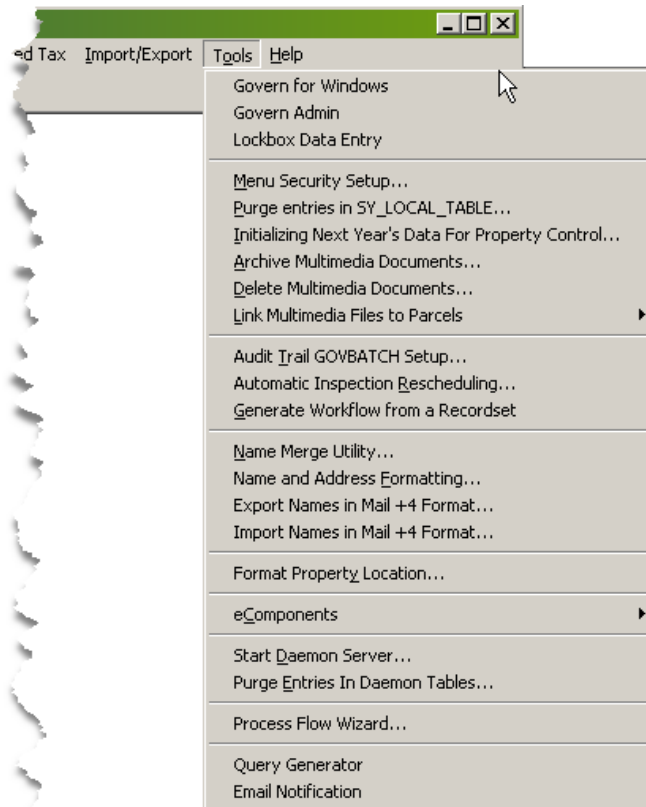
- Launching Govern for Windows. *See page 291*.
- Launching Govern Admin. *See page 291*.
- Launching the Payment Lockbox Data Entry. See *Launching the Payment Data Entry Lockbox on page 292*.
- Assigning User Permissions to Batch Processes. *See page 292*.
- Initializing Next Year's Data. *Refer to the Property Control guide for details*.
- Archiving Multimedia Documents. *Refer to the Property Control guide for details.*
- Creating Links to Multimedia Files. *Refer to the Permits & Inspections guide for details.*

- Performing Automatic Inspection Rescheduling. *Refer to the Permits & Inspections guide for details.*
- Merging Duplicate Name and Address Data. *Refer to the Property Control guide for details.*
- Formatting Name and Address Data. *See page 296.*
- Importing / Exporting Name and Address Data. *See page 314.*
- Formatting Property Location Data. *See page 296.*
- Generating Internet Accounts. This process generates eProfile accounts. *Refer to the eProfile guide for details.*
- Sending Computations to the Daemon Server. *See page 297.*
- Purge Entries in Daemon Tables. *See page 302.*
- Using the Process Flow Wizard. *See Process Flow Wizard on page 303.*
- Running SQL Queries in Govern Batch Processing. See
- Setting up E-Mail Notification for Batch Processes. *See Setting up E-mail Notification for Batch Processes on page 310.*

Launching Govern for Windows

Select *Tools* > **Govern for Windows** to launch the user data entry application, *Govern for Windows*.

> **Note:** The full suite of Govern applications must be located in the same directory. Typically, this is `C:\Govern\Govern 8.5\Bin`. The Govern for Windows application must be named `govern32.exe`.

To launch Govern, directly from the toolbar, click the Govern 🜨 icon.

Launching Govern Admin

Select *Tools* > **Govern Admin** to launch the administrative and configuration application, *Govern Admin*.

> **Note:** The full suite of Govern applications must be located in the same directory. Typically, this is `C:\Govern\Govern 8.5\Bin`. The Govern Admin application must be named `govadm32.exe`.

To launch Govern Admin, directly from the, click the Govern Admin 🔒 icon.

Launching the Payment Data Entry Lockbox

Select *Tools* > **Lockbox Data Entry** to launch the Payment Data Entry Lockbox.

> **Note:** The full suite of Govern applications must be located in the same directory. Typically, this is `C:\Govern\Govern 8.5\Bin`. The Lockbox application must be named lockbx32.exe.

You can launch the *Payment Data Entry Lockbox*, directly from the toolbar, by clicking the icon.

Assigning User Permissions to Batch Processes

NEW Govern users that are upgrading from Release 10.6 to 10.7 should note that a new method has been implemented to manage the menus. As a result of this enhancement, there is greater control of user menu access. Administrators are now able to give access to individual menu items; previously menu access was granted to all items under the menu. From Release 10.7, Administrators or Super Users can give access to specific menu items under a *Govern Batch Processing* (**GovBatch**) menu (**A**).
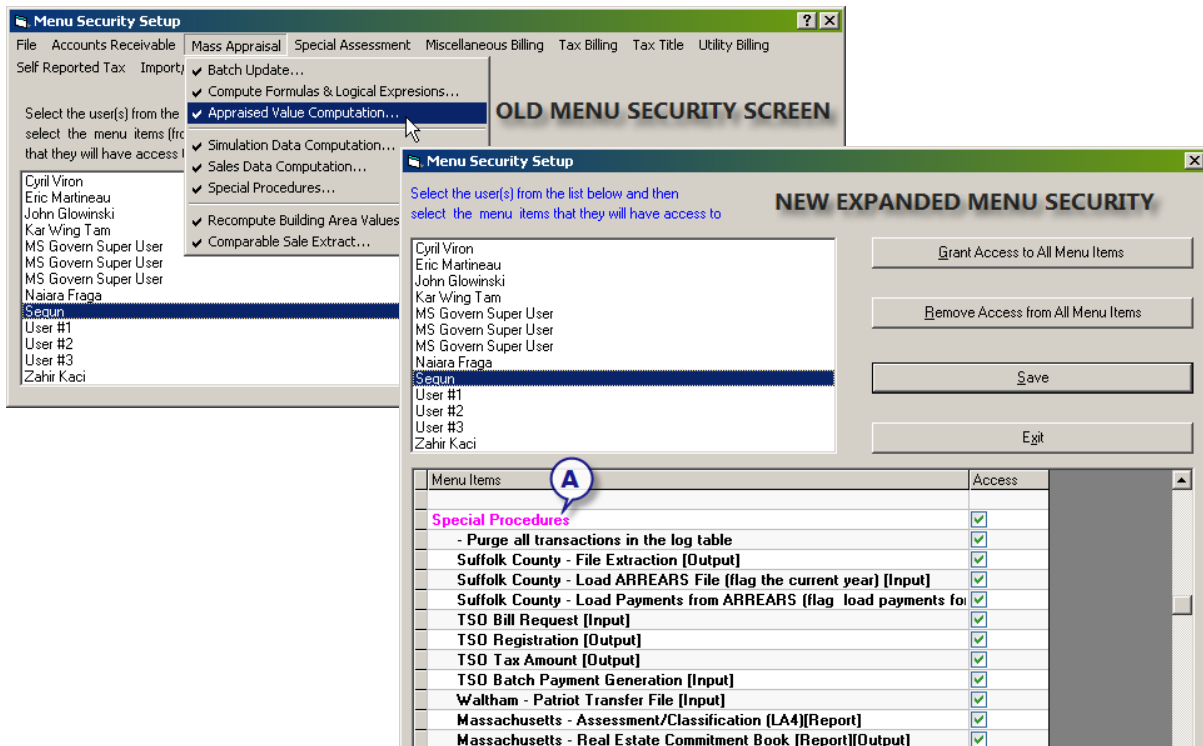
Select *Tools* > **Menu Security Setup** to launch the *Menu Security Setup* form and assign user permissions to Govern's batch processes.

> **Note:** Administrators will need to set access rights for users. By default Super Users and Administrators have access to all Govern Admin forms, but Users and Inquiry Only users will not have access to any menus until access has been granted, *See Access Types on page 64 for full details about user types.*
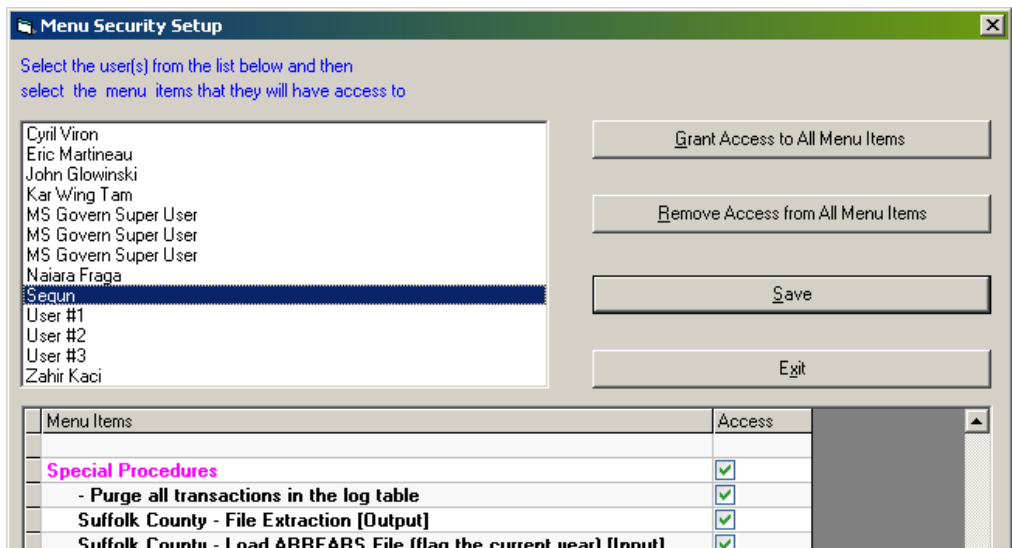
To access this process, from Govern's main screen, select **Tools** > **Batch Processing (Govbat32.exe)**

OR

Click **Applications** in the *Side Navigation Bar* to display Govern applications;

click 🕐 *Govern Batch Processing.*

In Govern Batch, select *Tools* > **Menu Security Setup...**

Menu Security Setup Command Buttons

Grant Access to all Menu Items: Click **Grant Access to all Menu Items** to grant the selected users access to all features and processes in Govern Batch Processing.

Remove Access to all Menu Items: Click **Remove Access to all Menu Items** to block the selected users from all features and processes in Govern Batch Processing.

Save: Click **Save** to save your security settings.

Exit: To close the *Menu Security Setup* form, click **Exit**.

Granting and Restricting Access to Batch Processes

To grant or restrict access to a batch process, menu, or menu item:

1. In *GovBatch*, select *Tools* > **Menu Security Setup...**

2. In the *Menu Security Setup* screen, click to select a user, in the list box.

> **Tip:** You can select as multiple users at the same time. To select multiple consecutively listed users, select the first user, hold down the *Shift* key and select the last name in the list. For non-consecutively listed users, press the *Ctrl* key while selecting. To deselect a user, hold down the *Ctrl* key and reselect the user.

3. Scroll through the list to locate the menu, or menu items, where the processes are contained.

4. Select the process to grant access; if deselected access will be restricted.
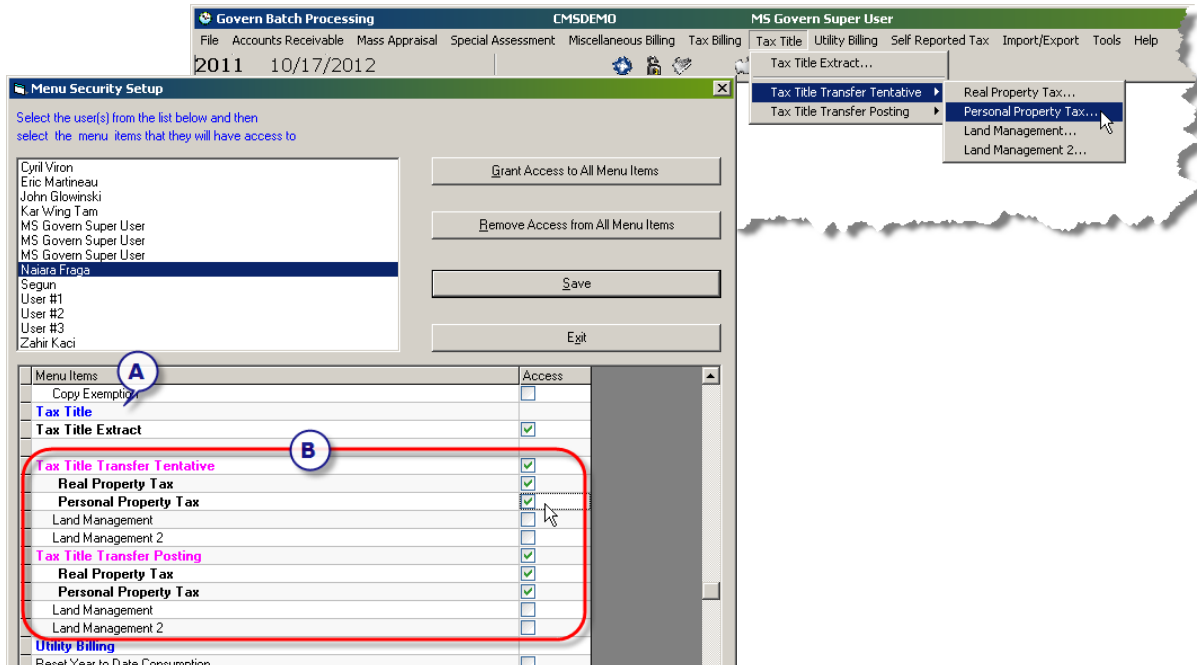
> **Note:** The user has access to all processes that are selected on the menu. When granting access to a menu ensure that the Menu (**A**) and required Menu items (**B**) are selected.

5. Click **Save** to save the security settings.

6. Click **Exit** to close the form.

Initializing Next Year's Data

Run the *Initialize Next Year Data* batch process to initialize the *Property Control* subsystem for the new fiscal year. *For details on the Initializing Next Year's Data process, refer to the Property Control guide.*

Archiving Multimedia Documents

Run the *Archive Multimedia Documents* to save the multimedia files to the Level 1, 2 or 3 directories as set up in Govern Admin. *For details on the Archive Multimedia Document process, refer to the Property Control guide.*

Creating Links to Multimedia Files

Run the *Link Multimedia Files to Permits* function to link multimedia files to multiple permits *For details on the Link to Multimedia processes, refer to the Permits & Inspections guide.*

Performing Automatic Inspection Rescheduling

Run the batch *Automatic Inspection Rescheduling* process to schedule inspections that need to be performed periodically. *For details on the Automatic Inspection Rescheduling process, refer to the Permits & Inspections guide.*

Merging Duplicate Name and Address Data

Run the *Name Merge Utility* when you need to combine two or more existing name and address records into a single record. *For details on the Name Merge Utility, refer to the Property Control guide.*

Formatting Name and Address Data

Run the *Formatting Name and Address Data* this process when you need to update multiple records that have been added through an import. This process formats the name and address data, in NA_NAMES, according to the **Country Format** set on the *System Registry Maintenance* form in Govern Admin. *See System Registry Maintenance on page 16 for details on the Country Format code.*

Formatting Property Location Data

Run the *Formatting Name and Address Data* this process when you need to update multiple records that have been added through an import. Similar to the *Format Names and Addresses*, this process formats the name and address data, in PC_ADDRESS, according to the **Country Format** set on the *System Registry Maintenance* form in Govern Admin. *See System Registry Maintenance on page 16 for details on the Country Format code.*

Sending Computations to the Daemon Server

📖 Overview

The Daemon Server

In the Unix world, the term "daemon" is used to refer to a process that performs a service in the background. A "server" refers to a computer that is dedicated to running a specific application. A "daemon server" in the true sense of the meaning, i.e. waits for requests to arrive and automatically spawns other "instances" of itself to handle these requests.

Although the Govern Daemon Server tool fits the description of the aforementioned definitions, it is not a true "daemon server" in the sense that it does not automatically spawn other "instances" of itself to handle requests. The *Govern Daemon Server* is a batch process that can be manually started on each server that is running the *Govern Batch Processing* application. When initiated, each running instance is capable of processing a preset number of records in the database; this effectively allows you to share any processing activities.

Processing Records in Govern

Govern can process records in two (2) ways, *Online* (*Local)*, and *Daemon Server*.

> **Note:** The term **Online** in this context should not be confused with the current usage of the word that refers to an internet activity; nor is it in reference to any of the eGovern solutions.

Online (Local): An *Online* (*Local)* process is one that occurs directly on the workstation where Govern is installed. This type of process applies to how functions in *Govern for Windows*, as well as any *Govern Batch Processing* is executed. For example, when you complete parameters on a form and click

Start, entries are first saved to a table, followed by any required computations; this entire process occurs locally, i.e. directly on your workstation.

> **Note:** In this type of process, system configuration is critical to how fast calculations and batch processes are completed. The faster your system, i.e. CPU speed, system RAM. Hard disk capacity and access speed combination, the better your performance, *Refer to Govern's recommended System and Network Requirements in the Getting Started guide.*

Daemon Server: When you execute a function in *Govern for Windows* or initiate a batch process in *Govern Batch Processing*, you have the option to request the assistance of the *Daemon Server*. When a *Daemon Server* is requested, the process automatically becomes a *Daemon Server Process,* and is executed and shared by any instances of the daemon server that are running.

> **Note:** In order for a process to use a Daemon Server, the Daemon Server must be running, i.e. manually started. In environments that use a Daemon Server, it is customary to have one or more instances of it continuously running on a server.

When a *Daemon Server* is started, it immediately begins checking two (2) tables to see if any data has been written to them. The tables that are checked are USR_DAEMON_ONLINE, which corresponds to *Govern for Windows* online requests for processing, and USR_DAEMON_BATCH which corresponds with *Govern Batch Processing* requests. As soon as data is written to one of these tables, the Daemon Server begins processing the records.

> **Note:** The USR_DAEMON_ONLINE table has a higher processing priority than the USR_DAEMON_BATCH table, i.e. all Online (Local) processes will be performed before starting any requests from Govern Batch.

Why use the Daemon Server

Advantages to using the Daemon Server can be seen in environments where extended save times are observed in *Govern for Windows*. Examples are users of the *Real Property Tax* functions, or *Mass Appraisal* functions like *Building Structural Elements* (**BSE**), *Mass Appraisal Values Computation* and the *Mass Appraisal Simulation Data Computation*. Delays can be due to a large number of records being saved, or complexity of computations, i.e.

multiple formulas, logical expressions, etc. *See MA Daemon Server Computation in the Mass Apraisal General Information Guide.* In addition, users of *Govern Batch Processing* that running *Mass Appraisal* and *Tax Billing* postings to *A/R* will also benefit from running a *Daemon Server*.

In such instances, running the *Daemon Server* may result in significant savings in time. Additional gains are obtained when *Daemon Servers* are running on multiple servers.

> **Note:** In *Govern for Windows*, when using any of these functions ensure that the **MA Daemon Server Computation** and/or the **TX Daemon Server Computation** options have been selected under the options menu. In *Govern Batch Processing*, ensure that the **Send to Daemon Server** option has been selected in the form of the relevant batch process.
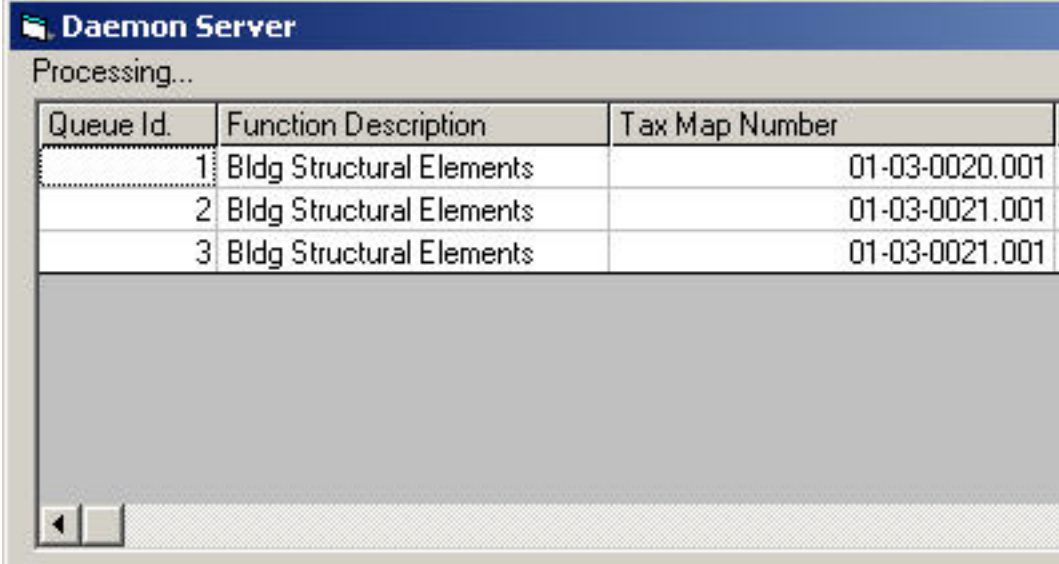
Sending Computations to the Daemon Server

To start the Daemon Server, from Govern's main screen, select *Tools* > **Batch Processing (Govbat32.exe)**

OR

Click **Applications** in the *Side Navigation Bar* to display Govern applications;

click 🕐 *Govern Batch Processing.*

In Govern Batch, select *Tools* > **Start Daemon Server...**

The Daemon Server application displays the following information from the
USR_DAEMON_ONLINE table.

Default Settings

The following settings are saved to the SY_REGISTRY table:

Maximum number of records per batch

By default, the maximum number of records per batch is 100. This refers to
the number of records that can be transferred to a server, at a time. For
example, if there are ten servers, assigned as *Daemon Servers*, a maximum
of 100 records can be transferred to each one; so that, a maximum of 1,000
records can be processed or in processing queues, at a time, and no server is
overloaded. When a server has processed one batch of 100, another batch
can be then be transferred to it.

The parameters for this setting, in the SY_REGISTRY table, are as follows:
DAEMON_SERVER, BATCH_MAXIMUM_RECORDS, 100

You can define this setting on the *System Registry Maintenance* form in
Govern Admin. *See Daemon Server group on page 35.*

Delay before startup

By default, the delay between the time a record is saved and then transferred to the *Daemon Server* is ten minutes. This value prevents the same record from being processed with different values. This can occur when a user saves a record in Govern for Windows, then makes a correction almost immediately afterwards.

The parameters for this setting, in the SY_REGISTRY table, are as follows: **DAEMON_SERVER, ONLINE_START_AFTER, 10**.

This setting can be defined on the *System Registry Maintenance* form in Govern Admin.

Processing

Queue ID: This is automatically assigned to define the position of process in the queue. The item with the lowest number is processed first.

Function Description: This field displays the name of the function using the Daemon Server.

Tax Map Number: This field displays the tax map number for the record.

Reference ID: This field displays one of the following:

- for a Govern function, it provides a secondary reference for the record; for example, the building or land ID.
- for a Govern Batch process, it provides a **Batch Number**. For example, if 10,000 records being processed, each batch may include 250 records. Each batch could be processed by different servers, at the same time.

Status: This field displays the status of the batch process; such as **Online Processing** or **Online Finished**.

Error Log

This section displays the queue ID, batch number and error description of any failed processes.

Daemon Server Command Buttons

Pause: Select this option to stop the Daemon Server temporarily. When you select this option the Continue button is enabled.

Continue: Select this option to continue the Daemon Server after pausing.

Exit: Select this option to close the form.

Start automatically at next logon: Select this option to start the Daemon Server automatically on the computer at the next logon.

Purge Entries in Daemon Tables

Run this process to clear the following tables as well as the Daemon Server grid in Govern Batch Processing.

- USR_DAEMON_BATCH
- USR_DAEMON_BA_CTL
- USR_DAEMON_ONLINE

FINAL DRAFT

Process Flow Wizard

📖 Overview

An administrator can set up a workflow, using the *Process Flow Wizard Setup*, to define the batch processes that need to be run, administrative procedures that need to be performed, and reports that need to generated in order to complete a work process. *See Process Flow Wizard Setup on page 161.*
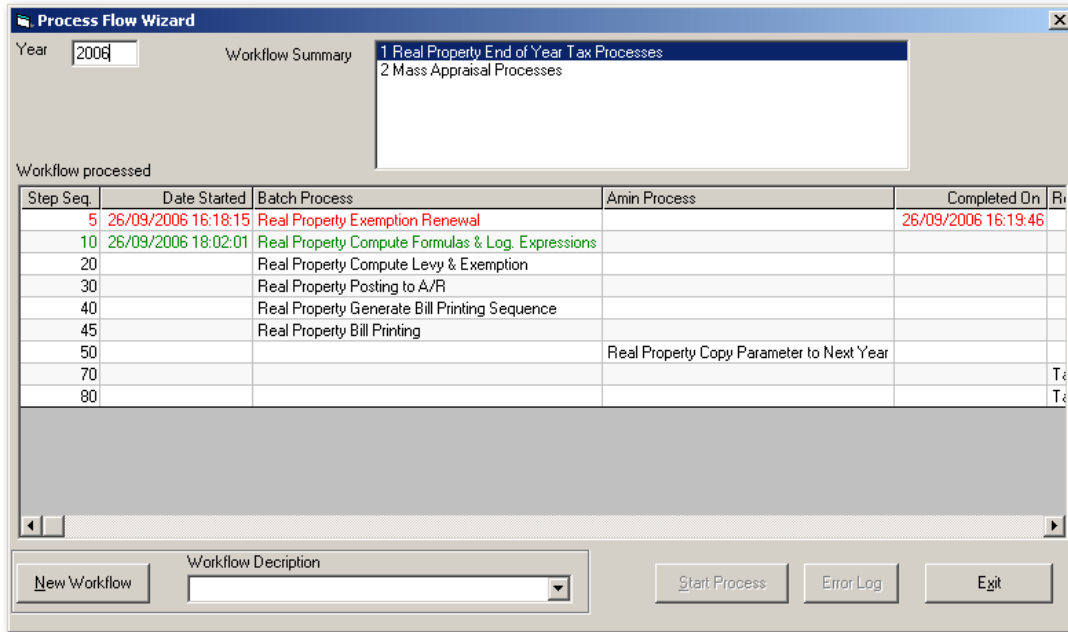
Use the new *Process Flow Wizard* to keep track of each task in the workflow. The starting and completion date and times are displayed, with the name of the user and whether any errors were reported.

To launch this process, from Govern's main screen, select *Tools* > **Batch Processing (Govbat32.exe)**

OR

Click **Applications** in the *Side Navigation Bar* to display Govern applications; click 🕐 *Govern Batch Processing.*

In Govern Batch, select *Tools* > **Process Flow Wizard...**

Launching a Workflow

To start a workflow:

1. Modify the fiscal year in the **Year** text box, if required.

2. Select the workflow from the **Workflow Description** drop-down list.

3. Click **New Workflow**. The workflow is displayed in the grid. Select the first step and click **Start Process**.

4. When the step is completed, highlight the next step and continue, until the workflow is completed.

Once a workflow has been started, it is added to the **Workflow Summary** list box. The following details are displayed in the grid, as each step is completed:

• **Step Sequence**: the step number defined in Govern Admin. The workflow must be completed in the order defined by the steps.
• **Date Started**: the date and time the task was started.
• **Batch Process**: the Govern batch process, that needs to run to complete the step.
• **Admin Process**: the Govern administrative process, that needs to be performed to complete the step:
• **Report**: the report that needs to be generated to complete the step.

- **Completed On**: the date and time the step was completed.
- **User**: the user ID of the user who started the step.
- **Process ID**: the Process ID, defined in USR_PROCESS_LOG.
- **Errors**: the status of the process, displays **Yes** if there are errors or **No** if there are no errors.

Restarting a Step

You may need to restart a step in the workflow, for example, if an error was encountered in the process.

To restart a step:

1. Highlight the step in the grid.

2. Click **Restart**.An confirmation message is displayed.

3. Click **Yes** on the confirmation message to continue.

> **Note:** An administrator can block the **Restart** on a step. This is done to ensure that all required processes are complete before the step is restarted, for example, if a calculation needs to be performed before a step can be executed. If the **Restart** has been blocked, a message is displayed and you need to restart the workflow, from the step that is indicated.

Displaying Errors

Any errors that occur during the workflow are recorded in the *Govern Batch Processing Error Log*. To view the errors, click **Error Log** on the *Process Flow Wizard*.

Switching from One Workflow to Another

The workflows that have been started are listed in the **Workflow Summary** in the top section of the *Process Flow Wizard*. You can display a different workflow or continue working on steps in a different workflow, by highlighting it in this list box.

FINAL DRAFT

Creating SQL Queries in Govern Batch Processing

📖 Overview
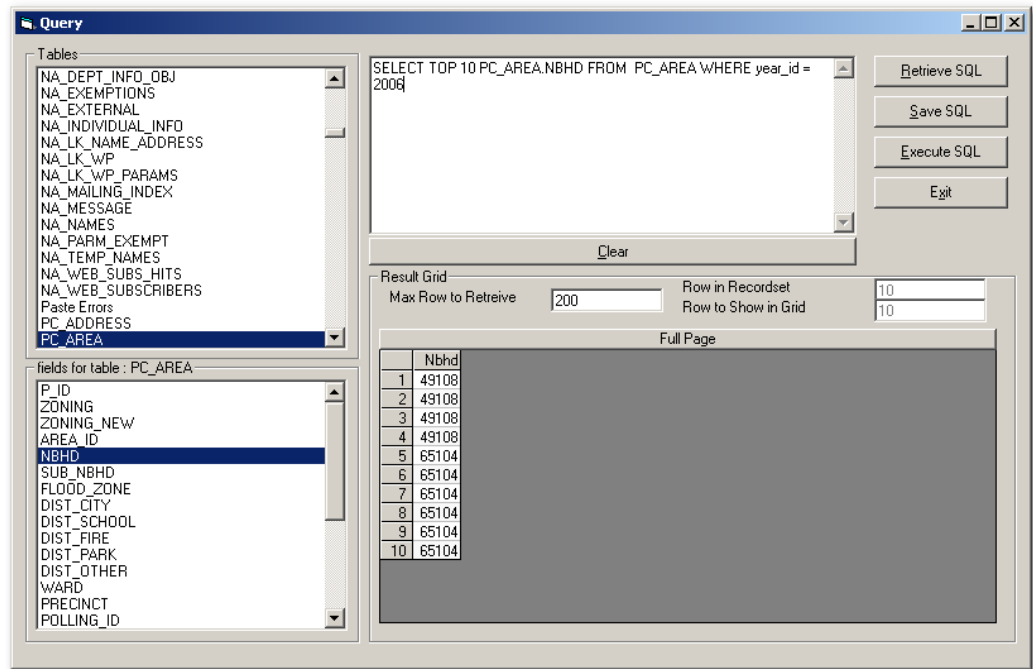
Use the *Query Generator* to view, update or delete data, before running a batch process. The *Query Generator* lists the tables in the database and the fields in each table. It has an edit screen, a results grid and a window for displaying logged errors. You can execute an SQL query saved to a file or build a query selecting the tables and fields, from the list boxes.

To access this process, from Govern's main screen, select *Tools* > **Batch Processing (Govbat32.exe)**

OR

Click **Applications** in the *Side Navigation Bar* to display Govern applications; click 🕐 *Govern Batch Processing*.

In Govern Batch, select *Tools* > **Query Generator...**

Creating and Executing an SQL Query

To create an *SQL Query* on the *Query Generator*:

1. Compose the query on the *Query Editor* on the top right of the form.

2. To add a database table, postilion your cursor on the *Query Editor* and double-click on the table in the list box.

3. To add a database field, postilion your cursor on the *Query Editor*, highlight the table and double-click on the field in the list box

4. Click **Save SQL** to save the query, as an SQL file, to a directory on your computer or network.
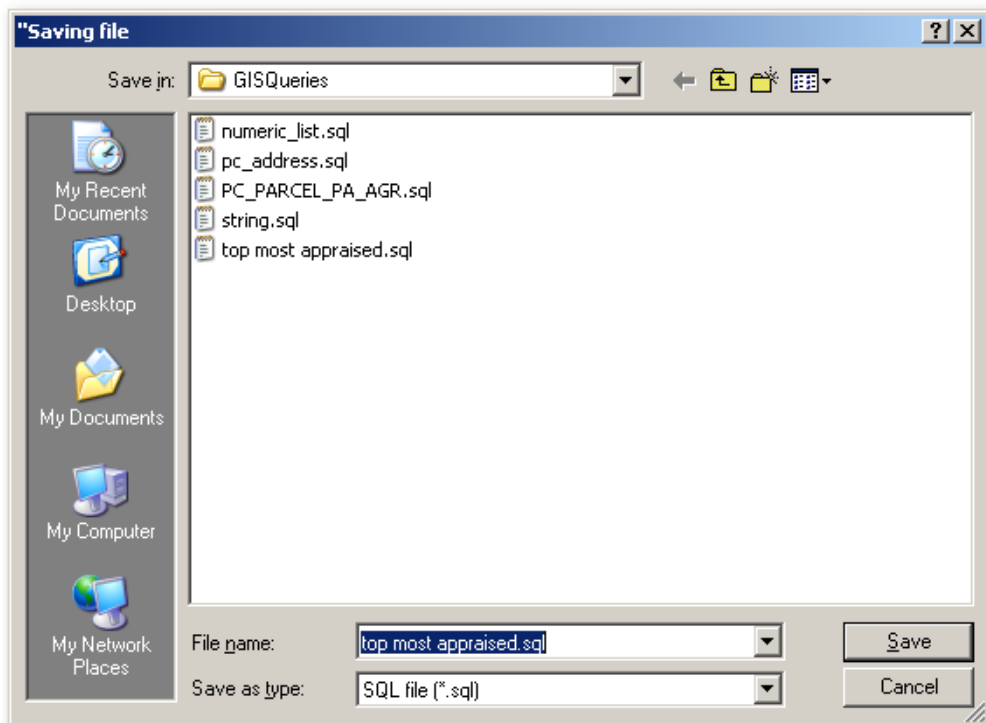
5. Enter a name for the query and click **Save**.

6. Enter the maximum number of records to retrieve, in the **Max. Rows to Retrieve** field.

7. Click **Execute SQL**.

8. The results of the query are displayed in the *Results Grid*.

The number of records, in the recordset, is displayed in the **Rows in Recordset** field.

The number of records shown in the grid is displayed in the **Rows to Show in Grid** field.

Executing a Query Saved to a File

To execute a query saved to a file:

1. Launch Govern Batch Processing.

2. Select *Tools* > **Query Generator**.

3. Click **Retrieve SQL**.
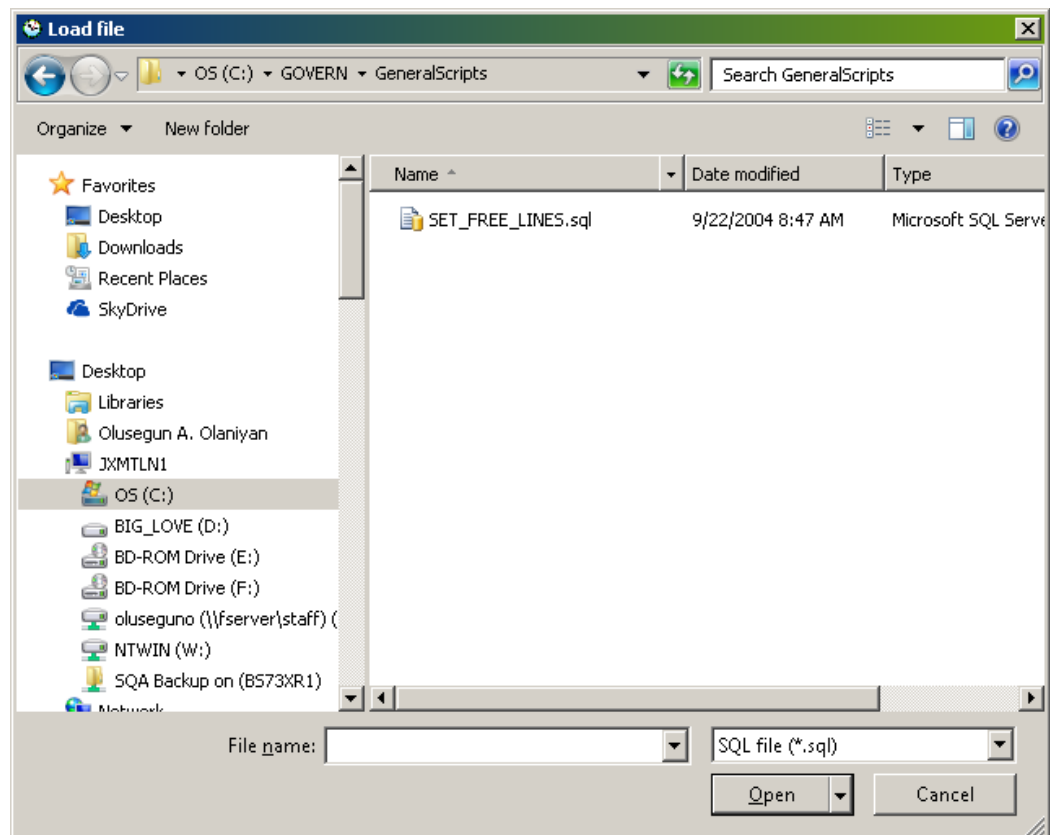
4. Navigate to the drive and directory and select the file.

5. Click **Open**.

6. Review the query and make modifications if required.

7. Click **Execute SQL**.

For further details on using queries in Govern, see SQL Queries on page 211.

Setting up E-mail Notification for Batch Processes

📖 Overview

Use the **E-mail Notification** process to automatically send e-mail messages to an operator when a batch process has been completed. Two types of messages can be defined, one for a process that was completed without errors the other to notify the operator that errors were encountered during the process.

The following information is sent with the e-mail:
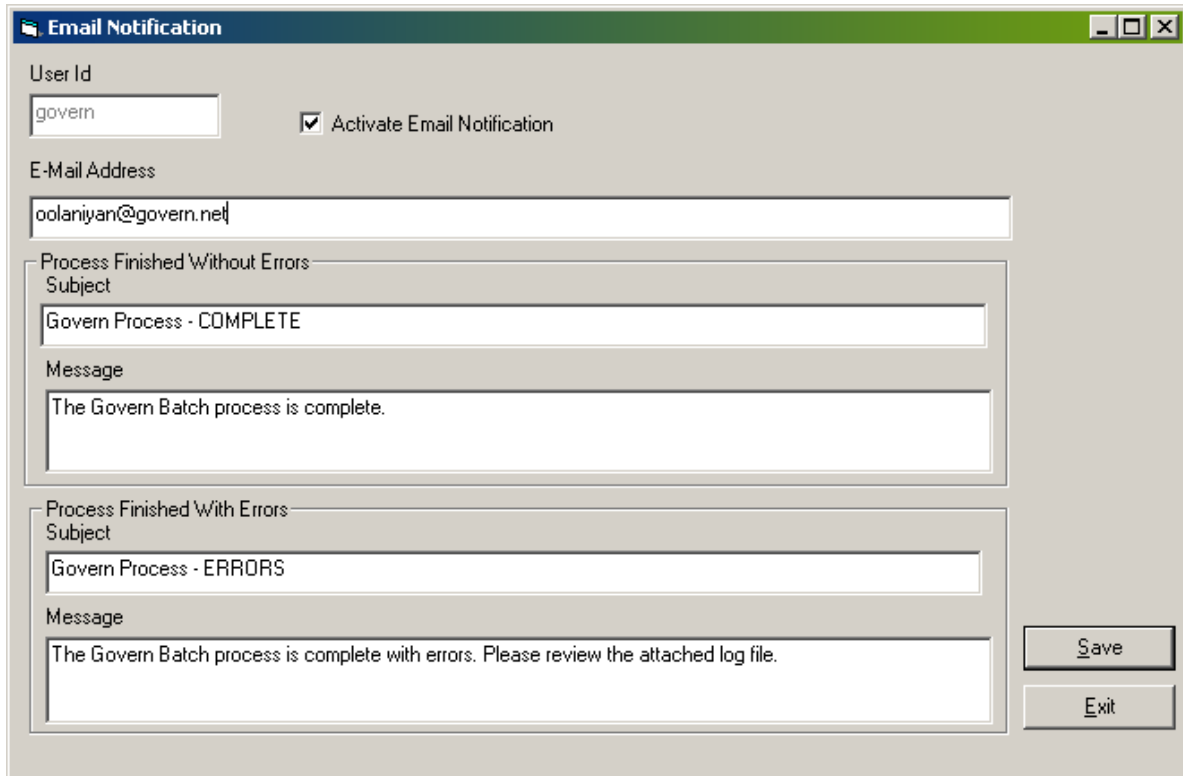
- The batch process
- The criteria used in running the process, for example, a range or tax map numbers or dates
- The log file, if errors are encountered

To access this process, from Govern's main screen, select *Tools* > **Batch Processing (Govbat32.exe)**

OR

Click **Applications** in the *Side Navigation Bar* to display Govern applications; click 🕐 *Govern Batch Processing*.

In Govern Batch, select *Tools* > **E-mail Notification...**

To set up e-mail notification for batch processes:

1. Complete the **SMTP Setup** on the *System Registry Maintenance* form, in Govern Admin. *See SMTP Setup group on page 35, for details*.

2. Launch the **E-Mail Notification** process in *Govern Batch Processing*.

3. Enter one or more e-mail addresses for the sender of the e-mail in the **E-Mail** Address text box. If you are entering multiple addresses, separate them with a semi-colon (;).

4. Enter a subject to be sent when processes are completed without errors.

5. Compose a message for the successful processes.

6. Enter a subject to be sent when errors are encountered.

7. Compose a message for these e-mails.

8. Select **Activate E-mail Notification**, when you want to use this feature. Deselect the option, if you do not want to use it.
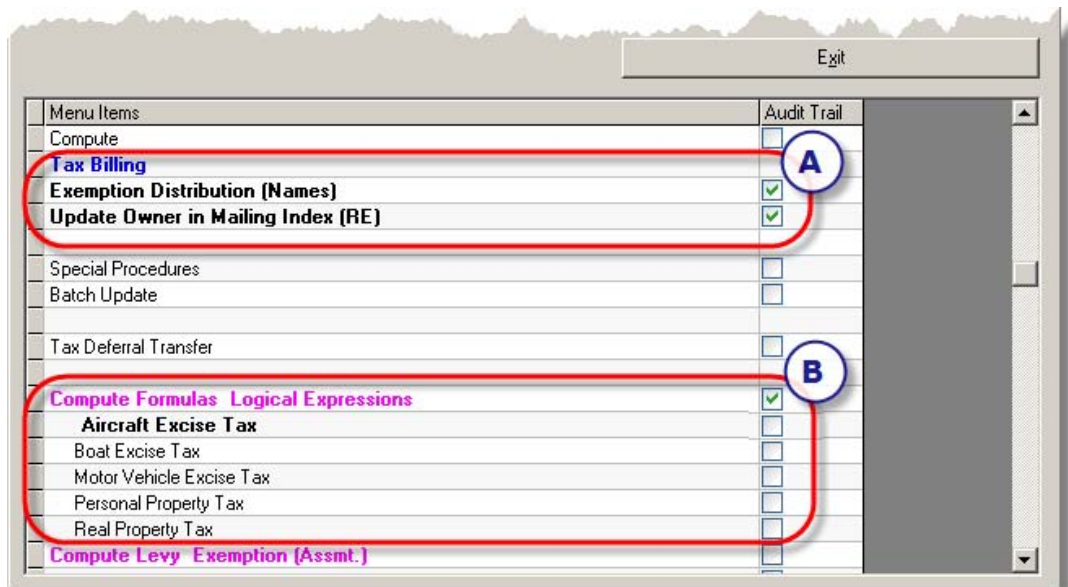
9. Click **Save**.

> **WARNING:** The *E-mail Notification* option is directly linked with the *Govern Batch Processing Audit Trail* feature. When configuring *E-mail Notification*, it is important that you also enable the Audit Trail option for the process that you will be running.

To enable the *Audit Trail* option for the batch process that you will be running...

1. In *Govern Batch Processing* select *Tools* > **Audit Trail Setup...**

2. In the *Audit Trail Setup* form, scroll down the list to locate the module with the process that you will be running and click under the *Audit Trail* column (**A**) to select it; a check mark is an indication that the option has been set.

Menus and Submenus

Some headings are colored **Pink** (**Magenta**) (**B**), this is an indication of a main menu that contains submenus. To select all submenus under the main menu, select the main menu.

3. Click the main menu to automatically select all submenus, or select only required individual submenus.

4. Click **Save** (**1**).

Export / Import Names in Mail +4 Format

📖 Overview

There are two batch processes for generating tax billing information in Mail +4 Format:

• Export Names in Mail +4 Format
• Import Names in Mail +4 Format

The *Export Names in Mail +4 Format* process creates a database with the name records for the properties with calculated assessments. Before running this process, you need to calculate the billing data and post the information to *Accounts / Receivable*. Once you have the database, run the *Melissa Address Verification* software to update it with the following information for each name record:

• SEQUENCE: Mail Distribution Sequence
• CRRT: Carrier Route Code
• DPBC: Delivery Point
• CONTAINER_NUMBER
• PACKAGE_NUMBER

Once the database is updated, run the *Import Names in Mail +4 Format* to update the **XX_POST_MASTER** table, where **XX** refers to the module that the export is being run for, i.e. AC, BT, MV, PP, TX, or UB.

Export Names in Mail +4 Format

The *Export Names in Mail +4 Format* batch process generates a database with the computed properties for the names. This is saved to one of the following tables, depending on the subsystem selected:
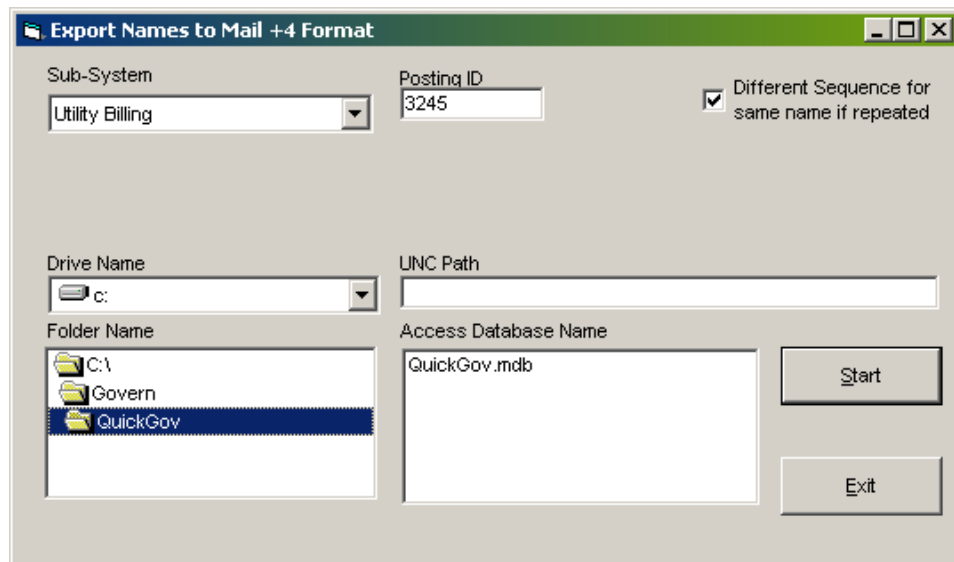
• AC_POST_MASTER, for Aircraft Excise Tax data
• BT_POST_MASTER, for Boat Excise Tax data
• MV_POST_MASTER, for Motor Vehicle Excise Tax data
• PP_POST_MASTER, for Personal Property Tax data
• TX_POST_MASTER, for Real Property Tax data
• UB_POST_MASTER, for Utility Billing data

To access this process, from Govern's main screen, select *Tools* > **Batch Processing (Govbat32.exe)**

OR

Click **Applications** in the *Side Navigation Bar* to display Govern applications; click 🕐 *Govern Batch Processing.*

In Govern Batch, select *Tools* > **Export Names in Mail +4 Format...**

General Parameters for All Subsystems

Sub-system: Select the subsystem from the **Subsystem** drop-down list.

- Aircraft
- Boat
- Motor Vehicle
- Personal Property
- Real Property
- Utility Billing

Year: By default, this field displays the current fiscal year of your department. Modify this field to use a different year.

A/R Cycle: If you selected **Real Property Tax**, select the **A/R Cycle** from the drop-down list.

> **Note:** This field is enabled only if **A/R Master by Cycle Code** is selected on the *Accounts Receivable General Parameters* form.

Posting ID: If you selected Utility Billing, select the Posting ID.

Different Sequence for Same Name if Repeated: Select this option to generate a new bill sequence number for a name if more than one record exists for the name. For example, the same name may be listed for two or more subsystems in the POST_MASTER table, once under Real Property Tax and again under Motor Vehicle Excise Tax.

Otherwise, deselect this option to use the same sequence number for all records associated with a name.

Bill Criteria Selection for Real Property Tax

> **Tip:** Select criteria for the export database, rather than copying all the names from TX_POST_MASTER.

To run the Mail +4 Import / Export process, using any of the options in this section, you need to complete the following steps in the defined order:

1. Run the *Generate Bill Printing Sequence Number* batch process. This populates the TX_POST_ MASTER table with the required data.
2. Run the Export Mail +4 Process.
3. Run the Import Mail +4 Process.
4. Run the Generate Bill Printing Sequence Number.

Message on Bill: Select this option to copy only the names with an associated message; for example, Owner w/ mortgage, TSO Mortgage, General or Duplicate Bill. Otherwise, leave this field blank to copy all names, regardless of the associated message. Messages are set up on the *Bill Messages Setup* form, in Govern Admin (Table: VT_USR_ MESSBILL). *Refer to the Super User guide for details*.

You can also select one of the following three options:

Single Bills Only: Select this option to copy only the names that are associated with *Single Bills*. The **Single Bill** setting is flagged in TX_POST_MASTER after an initial posting is made in the fiscal year. This indicates that a single property is associated with the name.

Multiple Bills Only: Select this option to copy only the names that are associated with multiple bills. The **Multiple Bill** field is flagged in TX_POST_MASTER after an initial posting is made in the fiscal year. This indicates that multiple properties are associated with the name.

Duplicate Bills Only: Select this option to copy only the names that are associated with **Duplicate Bills**. These are the names selected as the primary index, in the Mailing Index, or as the temporary owner(s) if the primary index is inactive. This also includes the names for which the **Duplicate Bill Requested** option is selected.

Database Name and Location for All Subsystems

Drive Name / Folder Name: Select the drive and folder of the export database.

UNC Path: You can enter the Universal Naming Convention (UNC) path instead of selecting the drive and folder; for example, `\\governserver\database`.

Access Database Name: Select the name of the database to which you are exporting the names or leave this field blank if you want to create a new database.

Start: Click **Start** to create the export database.

If you have not selected an existing database, the following confirmation message is displayed, when you click **Start**:
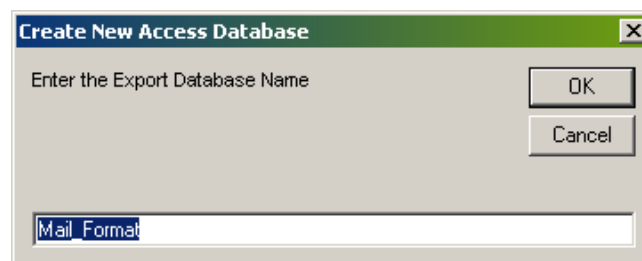
Enter a name for the new export database, or accept the default, and click **OK**.

Exit: Click **Exit** to close the form without running the process.

Import Names in Mail +4 Format
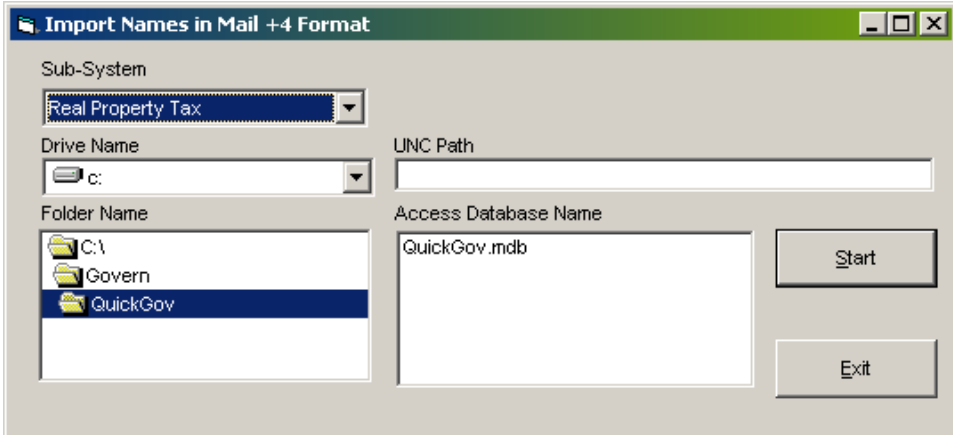
The *Import Names in Mail +4 Format* batch process is run to import a database that has been updated with the Mail +4 Format data to the NA_NAMES table.

To access this process, from Govern's main screen, select *Tools* > **Batch Processing (Govbat32.exe)**

OR

Click **Applications** in the *Side Navigation Bar* to display Govern applications; click 🕐 *Govern Batch Processing*.

In Govern Batch, select *Tools* > **Import Names in Mail +4 Format...**

Drive Name / Folder Name: Select the drive and folder where the database containing the Mail +4 names is located.

UNC Path: You can enter the Universal Naming Convention (UNC) path instead of selecting the drive and folder, such as `\\governserver\database\`.

Access Database Name: Select the database in the list.

Start: Click **Start** to run the process.

After running the Import process, you need to run the *Generate Bill Printing Sequence Numbers* and *Bill Printing* processes.

After this, run the *Generate Bill Printing Sequence Numbers* batch process and select the **Use Sequence from Mail +4 Format** option.

APPENDIX A: STANDARD REPORTS

📖 Overview

The following tables list the *Standard Reports*, provided with Govern:

- Table 1 lists the reports by subsystem
- Table 2 lists the reports alphabetically
- Tables 3 to 6 list the standard reports that are specific to each state

> **Note:** Before setting up your directory paths to the standard reports, on the *System Registry Maintenance* and *User Registry Maintenance* forms, ensure that you open the directory for your state and copy the reports to the **Standard Reports** directory. *See System Registry Maintenance on page 16 and User Registry Maintenance on page 53, for details.*

All reports are launched from *Govern* or *Govern Batch Processing* and need to be linked to a data entry function or batch process, or added to the Report Tree View. *See Linking Functions and Batch Processes on page 143 and Creating a Report Tree View on page 144.*

Table 1: Standard Reports by Subsystem

Report Name	Title	pdf Version
Accounts Receivable		
ARact1.rpt	A/R Activity Report (Effective Date)	aract1.pdf
Auxialgl.rpt	AR/GL Transaction Auxiliary Ledger	auxialgl.pdf
Mass Appraisal		
Mainvent.rpt	Mass Appraisal Inventory Report	mainvent.pdf
Masale.rpt	Mass Appraisal Sales Ratio Analysis	masale.pdf
masale_cls.rpt	Sales: Sales Ratio Analysis, by Class	masale_cls.pdf
masale_cls1.rpt	Sales Ratio, by Class (Drill Down)	masale_cls1.pdf
masale_cls2.rpt	Sales Ratio, by Class (Current Values)	masale_cls2.pdf

MSGovern

Report Name	Title	pdf Version
Miscellaneous Billing		
mbRecurring.rpt	Miscellaneous Billing: Recurring Entries Edit List	mbrecurring.pdf
Motor Vehicle		
CompMV.rpt	Tax Computation Register (MV)	compmv.pdf
Property Control		
pcacclbl.rpt	Labels (Property Owners with Account)	pcacclbl.pdf
Pcownlbl.rpt	Owner Labels with Tax Map Number	pcownlbl.pdf
Pcownlst.rpt	Owner Listing	pcownlst.pdf
Permits and Inspections		
dash_pm.rpt	Land Management Dashboard	dash_pm.pdf
PM_restr.rpt	Zoning Allowances & Restrictions	pm_restr.pdf
Personal Property		
CompPP.rpt	Personal Property Tax Computation Register	comppp.pdf
Ppcompute.rpt	Personal Property Computation Register (Summary)	ppcompute.pdf
Special Assessment		
SAbettlien.rpt	Special Assessment Lien Transfer List	sabettlien.pdf
System		
Audit_trail.rpt	Audit Trail Inquiry	audit_trail.pdf
process.rpt	Processes Log	process.pdf
Tax Assessment & Billing		
billREstat.rpt	Real Estate Bills Printing Statistics	billrestat.pdf
CompRE.rpt	Real Estate Tax Computation Register	compre.pdf
dash_re.rpt	Real Estate Tax Dashboard	dash_re.pdf
Opencr.rpt	Open Credit Report (Refund Report)	opencr.pdf
Taxctrld.rpt	Tax Receiver Totals: Detailed List	taxctrld.pdf

Report Name	Title	pdf Version
Txcompute.rpt	Tax Computation Summary	txcompute.pdf
txctrdt.rpt	Tax Receiver Totals (As of Date)	txctrdt.pdf
txctrdt1.rpt	Tax Receiver Totals (As of Date: Summary)	txctrdt1.pdf
Txsale.rpt	Sales Ratio Analysis (Real property)	txsale.pdf
Utility Billing		
dash_ub.rpt	Utility Billing Dashboard	dash_ub.pdf
Ublien.rpt	Water Lien (Preliminary Detailed)	ublien.pdf
Ubliens.rpt	Water Lien (Summary)	ubliens.pdf
Ublienx.rpt	Water Lien (Non Subject to Lien)	ublienx.pdf
Ubreadhis.rpt	Utility Billing Read History	ubreadhis.pdf
Ubreading.rpt	Lists all meters and readings attached to an account (Not Posted)	ubreading.pdf
UBRegister.rpt	Utility Billing Register (Tentative) Register of the last computation. This report can only be run after the *Tentative Billing* and before the *Posting*. A running parameter lets the user decide whether to print the details or only the totals.	ubregister.pdf
Ubregister2.rpt	Utility Billing Register (Posted) Billing Register. This report serves as an audit trail of billed records.	ubregister2.pdf

Table 2: Standard Reports, Listed Alphabetically

Report Name	Title	pdf Version
ARact1.rpt	A/R Activity Report (Effective Date)	aract1.pdf
Auxialgl.rpt	AR/GL Transaction Auxiliary Ledger	auxialgl.pdf

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Report Name	Title	pdf Version
Mainvent.rpt	Mass Appraisal Inventory Report	mainvent.pdf
Masale.rpt	Mass Appraisal Sales Ratio Analysis	masale.pdf
masale_cls.rpt	Sales: Sales Ratio Analysis, by Class	masale_cls.pdf
masale_cls1.rpt	Sales Ratio, by Class (Drill Down)	masale_cls1.pdf
masale_cls2.rpt	Sales Ratio, by Class (Current Values)	masale_cls2.pdf
mbRecurring.rpt	Miscellaneous Billing: Recurring Entries Edit List	mbrecurring.pdf
CompMV.rpt	Tax Computation Register (MV)	compmv.pdf
pcacclbl.rpt	Labels (Property Owners with Account)	pcacclbl.pdf
Pcownlbl.rpt	Owner Labels with Tax Map Number	pcownlbl.pdf
Pcownlst.rpt	Owner Listing	pcownlst.pdf
dash_pm.rpt	Land Management Dashboard	dash_pm.pdf
PM_restr.rpt	Zoning Allowances & Restrictions	pm_restr.pdf
CompPP.rpt	Personal Property Tax Computation Register	comppp.pdf
Ppcompute.rpt	Personal Property Computation Register (Summary)	ppcompute.pdf
SAbettlien.rpt	Special Assessment Lien Transfer List	sabettlien.pdf
Audit_trail.rpt	Audit Trail Inquiry	audit_trail.pdf
process.rpt	Processes Log	process.pdf
billREstat.rpt	Real Estate Bills Printing Statistics	billrestat.pdf
CompRE.rpt	Real Estate Tax Computation Register	compre.pdf
dash_re.rpt	Real Estate Tax Dashboard	dash_re.pdf
Opencr.rpt	Open Credit Report (Refund Report)	opencr.pdf
Taxctrld.rpt	Tax Receiver Totals: Detailed List	taxctrld.pdf
Txcompute.rpt	Tax Computation Summary	txcompute.pdf
txctrdt.rpt	Tax Receiver Totals (As of Date)	txctrdt.pdf
txctrdt1.rpt	Tax Receiver Totals (As of Date: Summary)	txctrdt1.pdf

Report Name	Title	pdf Version
Txsale.rpt	Sales Ratio Analysis (Real property)	txsale.pdf
dash_ub.rpt	Utility Billing Dashboard	dash_ub.pdf
Ublien.rpt	Water Lien (Preliminary Detailed)	ublien.pdf
Ubliens.rpt	Water Lien (Summary)	ubliens.pdf
Ublienx.rpt	Water Lien (Non Subject to Lien)	ublienx.pdf
Ubreadhis.rpt	Utility Billing Read History	ubreadhis.pdf
Ubreading.rpt	Lists all meters and readings attached to an account (Not Posted)	ubreading.pdf
UBRegister.rpt	Utility Billing Register (Tentative) Register of the last computation. This report can only be run after the *Tentative Billing* and before the *Posting*. A running parameter lets the user decide whether to print the details or only the totals.	ubregister.pdf
Ubregister2.rpt	Utility Billing Register (Posted) Billing Register. This report serves as an audit trail of billed records.	ubregister2.pdf

Table 3: Standard Reports for Massachusetts

Report Name	Title	pdf Version
MA_LA3.rpt	Sales Report (L3) Property Information including assessed and proposed values by sales date	
MA_la4.rpt	Classification Report (LA4)	
MA_TxRollBT.rpt	Tax Roll for Boat Excise Tax	
MA_TxRollMV.rpt	Tax Roll for Motor Vehicle Excise Tax	

MSGovern

Report Name	Title	pdf Version
MA_TxRollPP.rpt	Tax Roll for Personal Property Excise Tax	
MA_TxRollRE.rpt	Tax Roll for Real Property Excise Tax	
revledger.rpt	Revenue Ledger	revledger

Table 4: Standard Reports for New York

Report Name	Title	pdf Version
arlm1.rpt	Report of Taxable Assessed Values	
arlm2.rpt	Detailed List of Changes to Locally Assessed Properties	
arlm3.rpt	Total Assessment Value of Locally Assessed Properties, by School District	
arlm5.rpt	Detailed List of Exempt Properties	
arlm6.rpt	List of Court-Order Adjustments to Assessments	
assfinal.rpt	Tax Assessment Roll	
assfinals.rpt	Tax Assessment Roll (Totals Only)	
assnotice.rpt	Assessment Increase Notice	assnotice.pdf
NY_Opencr.rpt	Open Credit Report (Refund Report)	
NY_Paydist.rpt	Payment Distribution Report	
NY_Paydistp.rpt	Cash Book (Detailed)	
NY_taxctrld.rpt	Tax Receiver Collected Totals	
sum_arlm1.rpt	Summary Alarm Report	
TAXCTRL.RPT	Tax Receiver Totals	taxctrl.pdf
taxctrlw.rpt	Tax Receiver Totals (Weekly)	taxctrlw.pdf

Table 5: Standard Reports for Suffolk County, New York

Report Name	Title	pdf Version
taxroll.rpt	Final Tax Roll Report	taxroll.pdf
txoutbal1.rpt	Outstanding Balances (Delinquent Accounts: First Half)	taxval1.pdf
txoutbal2.rpt	Outstanding Balances (Delinquent Accounts: Second Half)	taxval2.pdf

Table 6: Standard Reports for Rhode Island

Report Name	Title	pdf Version
PROppreturn.rpt		
PROppsheet.rpt		

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