



HARRIS
GOVERN



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Word_{TM} Integration (Create a Template)
Govern V6

Release 6.0/6.1 Version 1

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[illegible]

Disclaimer

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

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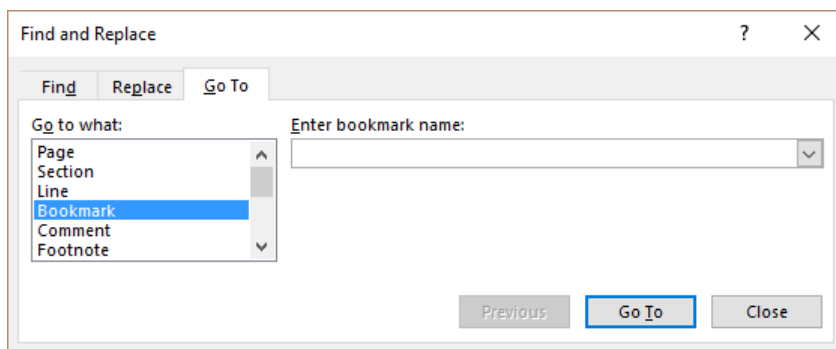
Overview

This document was compiled to address questions that may exist related to the creation of docX reports with bookmarks. The bookmarks created are used by Govern to dynamically populate with data from the Govern database. It also includes how to setup a docX report in GNA, and adding the report to a Profile. A common client request is to have letters re-created as reports in Govern.

The DocX Report

Bookmarks in Word

Bookmarks in a Word document allow users to assign names to text or to positions within a document. This allows users to easily locate these positions. Users can use the *Go To* (**Ctrl + G**) keyboard combination and select **Bookmark** under the *Go To* tab.



NOTE: Although the term “bookmark” is used, in the context of this Govern feature, the term “bookmark” will refer to any text enclosed within **double brace brackets** in the .docX report, e.g. **{{test}}**. *The Microsoft Word Bookmark function is neither used nor relevant to the configuration and setup process outlined in this document.*

The sample report, bookmark.docx, used in this document can be found in the Appendix section at the end of this document.

Creating a .DOCX Report

STEP 1 – Create the Document

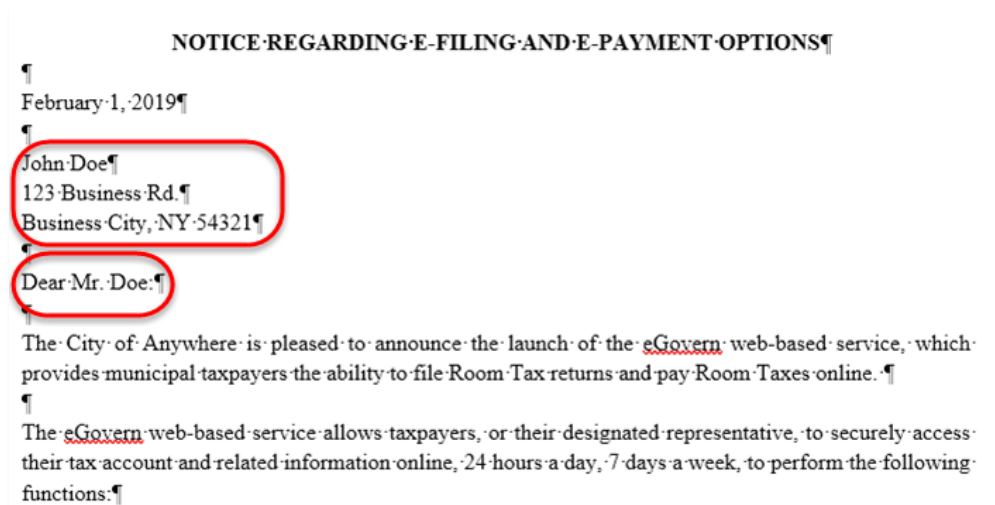
The creation of the report is straightforward in that it involves opening an existing MS Word document or, opening MS Word, and creating a new document.

To create a report:

1. Open or create a new Microsoft Word document.
2. Save the document in the .docX format; the **file name** must be fifteen (15) characters or less otherwise it will not be usable as a Govern report.

NOTE: The 15-character limitation includes both the file name and extension, e.g. **SAMPLREPT.docx**

The following screenshot illustrates the location of any text that is to be replaced with text obtained from the database.

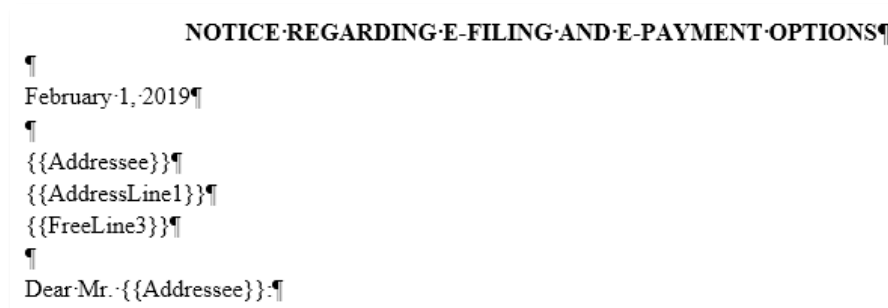


In our sample letter, two (2) blocks containing the following will be replaced:

- The name “John Doe” will be replaced with data from Govern.
- Replace “John Doe” with a Govern usable bookmark such as **{{Addressee}}**
- Replace “123 Business Rd.” with a Govern usable bookmark such as **{{AddressLine1}}**
- Replace the third address line with a Govern usable bookmark such as **{{FreeLine3}}**
- Replace **Dear Mr. Doe** with a Govern usable bookmark such as **{{Addressee}}**

The naming convention for the bookmarks is discretionary. The association of these bookmarks to database fields is discussed in the “Create or identify a query for the Report” section of this document.

This is what the modified information would look like in the document.



STEP 2 – Save the Document

After adding the Govern bookmarks to the document, save the document as a **.DocX** file format.

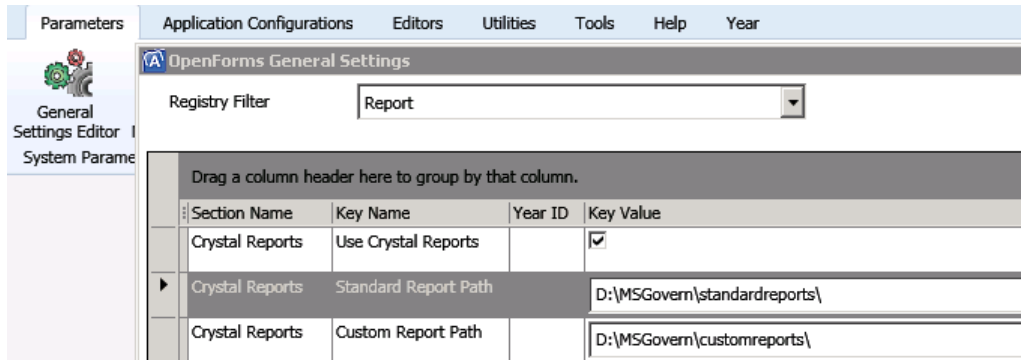
NOTE: Ensure that the 15-character filename limitation is respected; i.e. 15 characters includes the file name and extension, e.g. **SAMPLEREPT.docx**, **AppleTest.docx**, or **123.docx**, are valid names. Names like **My Sample Report.docx**, or **AssessorsAccounts.doc**, are not valid because both exceed the 15 character limit, and one is in a **.DOC** format.

STEP 3 – Place File in Custom Reports Folder

Next, place a copy of the file in the **Custom Reports** folder that is specified in GNA. The custom reports folder parameter is accessed in GNA.

To access the custom folder from the GNA ribbon...

1. Select Parameters (tab) > **General Settings Editor**.
2. In the OpenForms General Settings form, set the Registry Filter parameter to Report.
3. Locate the **Crystal Reports** Section Name, **Custom Report Path** Key Name.



Section Name	Key Name	Year ID	Key Value
Crystal Reports	Use Crystal Reports		<input checked="" type="checkbox"/>
Crystal Reports	Standard Report Path		D:\MSGovern\standardreports\
Crystal Reports	Custom Report Path		D:\MSGovern\customreports\

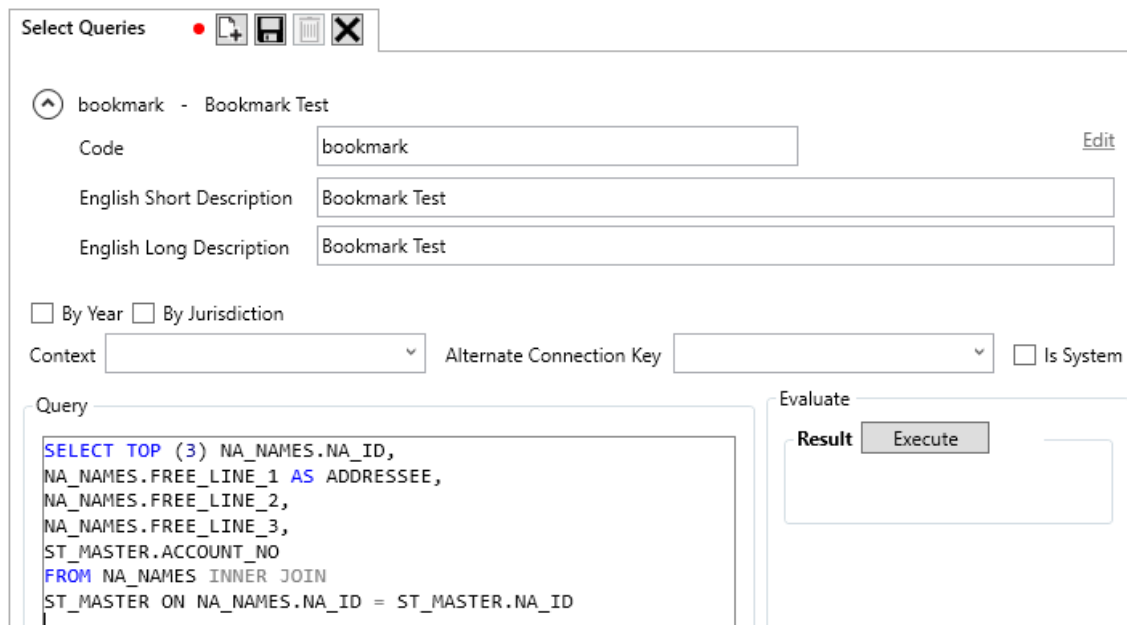
STEP 4 – Create or identify a query for the Report

The query will need to have, as part of its' **SELECT** statement, the database columns containing the data that will populate the **.DOCX** bookmarks. The query may contain more columns than are used by the **.DOCX** file, and does not have to contain any columns for bookmarks that are not going to be populated.

To create a query in the GNA ribbon...

1. Select *Editors (tab)* > *Queries Editor* > **Select Query Editor**.
2. Identify an existing query or create a new required query that will meet the requirements for the **.DOCX** report.

Query Sample



Select Queries

bookmark - Bookmark Test

Code: bookmark

English Short Description: Bookmark Test

English Long Description: Bookmark Test

☐ By Year ☐ By Jurisdiction

Context: Alternate Connection Key: ☐ Is System

Query

```
SELECT TOP (3) NA_NAMES.NA_ID,
NA_NAMES.FREE_LINE_1 AS ADDRESSEE,
NA_NAMES.FREE_LINE_2,
NA_NAMES.FREE_LINE_3,
ST_MASTER.ACCOUNT_NO
FROM NA_NAMES INNER JOIN
ST_MASTER ON NA_NAMES.NA_ID = ST_MASTER.NA_ID
```

Evaluate

Result

The following is a sample query used for testing with the example **.DOCX** report.

NOTE: Aliases may be used for column names in the query.


```
SELECT TOP (3) NA_NAMES.NA_ID,
NA_NAMES.FREE_LINE_1 AS ADDRESSEE,
NA_NAMES.FREE_LINE_2,
NA_NAMES.FREE_LINE_3,
ST_MASTER.ACCOUNT_NO
FROM NA_NAMES INNER JOIN
ST_MASTER ON NA_NAMES.NA_ID = ST_MASTER.NA_ID
```

The sample report, when used with the above query, will output a letter for each name record returned by the query. The query is set to return only 3 records. The above query does not contain any filters but these could be included using the Govern syntax for adding dynamic attributes or ID's to the query.

```
SELECT NA_NAMES.NA_ID,
NA_NAMES.FREE_LINE_1,
NA_NAMES.FREE_LINE_2,
NA_NAMES.FREE_LINE_3
FROM NA_NAMES
WHERE NA_NAMES.NA_ID = @idna_id
```

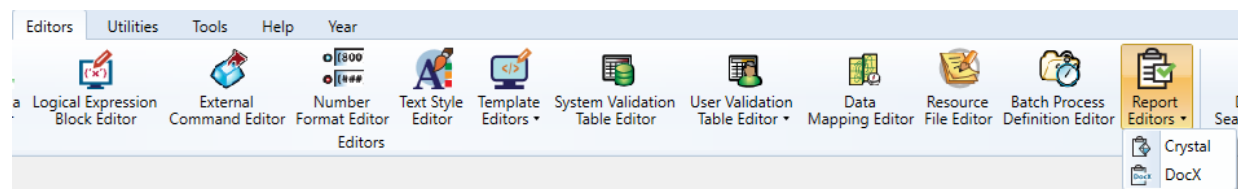
Once the query has been identified, the report is ready to be setup in GNA.

STEP 5 – Setup DOCX Report for Govern

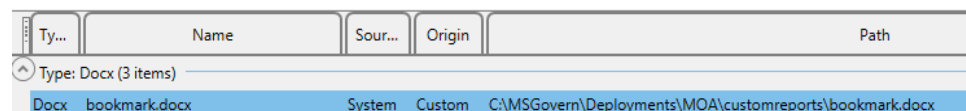
This section details how a **.DOCX** report is added to the list of reports available in Govern. It includes adding the report to a Profile so that it can be run from Govern.

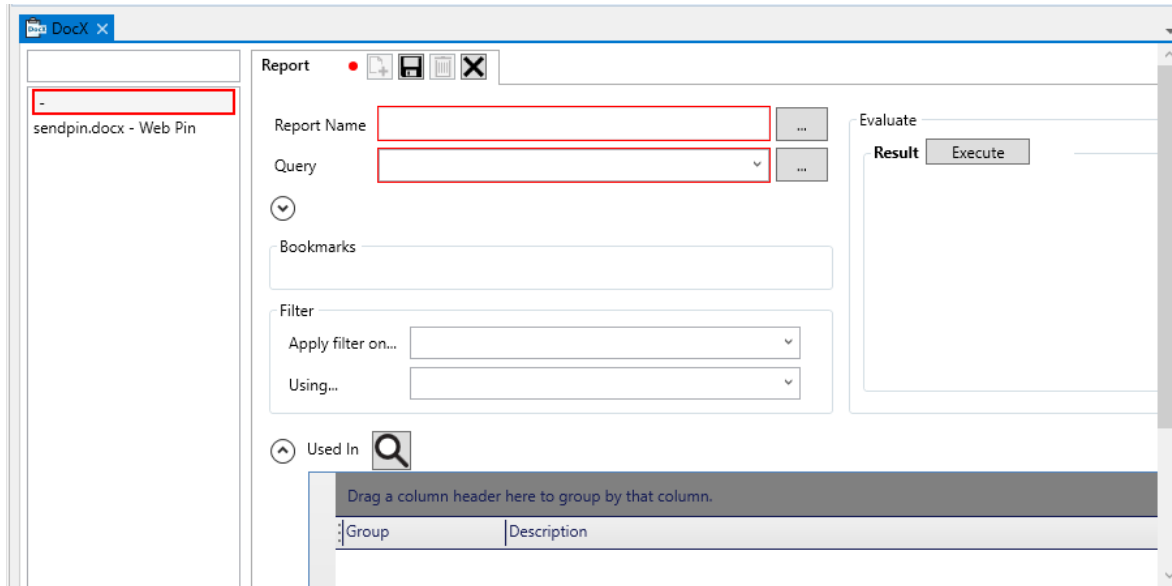
To add a report in the GNA ribbon...

1. Select *Editors (tab) > Report Editors > DocX*.



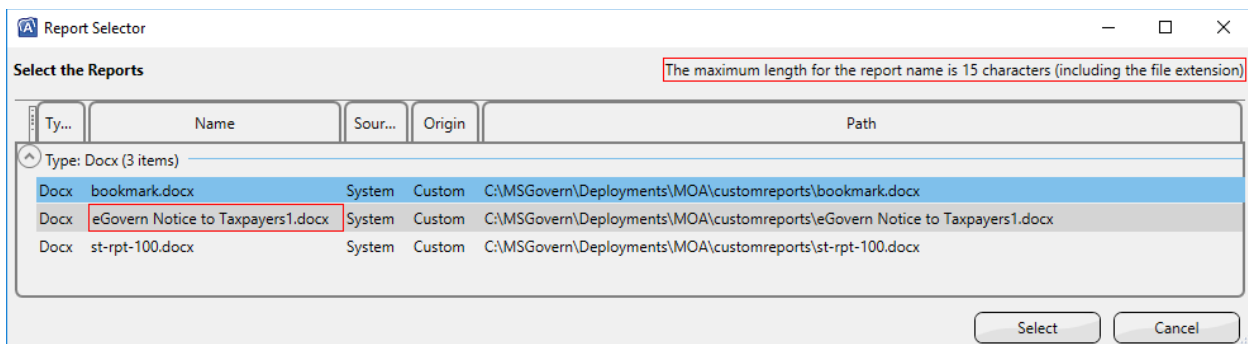
2. In the DocX Report form, under the Report tab, click New [+].
3. This will add a report that already exists in the Report paths identified earlier.
4. Click the ellipsis [...] to the right of the **Report Name** field that allows browsing of the report folders for report files having the **.DOCX** extension.





The browse list will only display reports that have not been added to the Govern .DOCX report list; shown on the left in the screenshot above).

NOTE: When a listed report field is outlined in red, this is an indication that the maximum length for the report name exceeds the 15 character limitation that is noted at the top of the window.








5. Select the report to add to *Govern's* report list and click **Select** at the bottom of the form.




6. Next, click to select the Query parameter combo-box highlighted in red.

NOTE: Do not click the ellipsis [...] as it will open the **Select Query Editor** window. From the list in the combo-box, locate and select the query that will be used for the report.

Report    

Report Name 

Query 

English Sh

English Lo

atPC01 - Audit By Parcel

bldgInfo - Building Information

bookmark - Bookmark Test





cbRTBAL - Room Tax Balance


ccCC001 - Deposit Management Total Principal Amount


ccCC002 - Deposit Management Total Interest/Penalty Amount


7. Add the appropriate English Short and Long Descriptions.

NOTE: The bookmark fields created in the **.DOCX** report are shown in a Bookmarks block. These bookmarks have a combo-box beside them that are used to associate columns from the query with the **.DOCX** report bookmark fields.

Report    

Report Name 

Query 

Bookmark Testing 

English Short Description

English Long Description

Bookmarks

Addressee

AddressLine1





FreeLine3


Evaluate


For our example, the bookmarks in the **DOCX** report will need to be associated with corresponding Govern database fields as follows:

- **{{Addressee}}** is associated with the (Table: NA_NAMES.FREE_LINE_1) column that was aliased as Addressee in the query.
- **{{AddressLine1}}** will be associated with the (Table: NA_NAMES.FREE_LINE_2) column
- **{{FreeLine3}}** is associated with (Table: NA_NAMES.FREE_LINE_3) column

NOTE: Double open “{” and closed “}” brace brackets are used for bookmarks.

Report    

Report Name 

Query 

Bookmark Testing

Bookmarks

Addressee

AddressLine1

FreeLine3

- Click **Save**.

STEP 6 – Test the Report Output

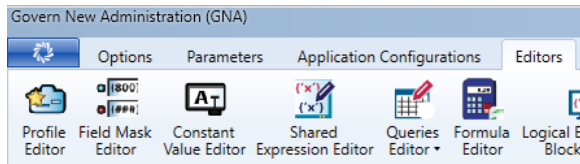
To test the report output, click **Execute** to display a generated PDF file containing the query results.

STEP 7 – Make Report Available to Profile

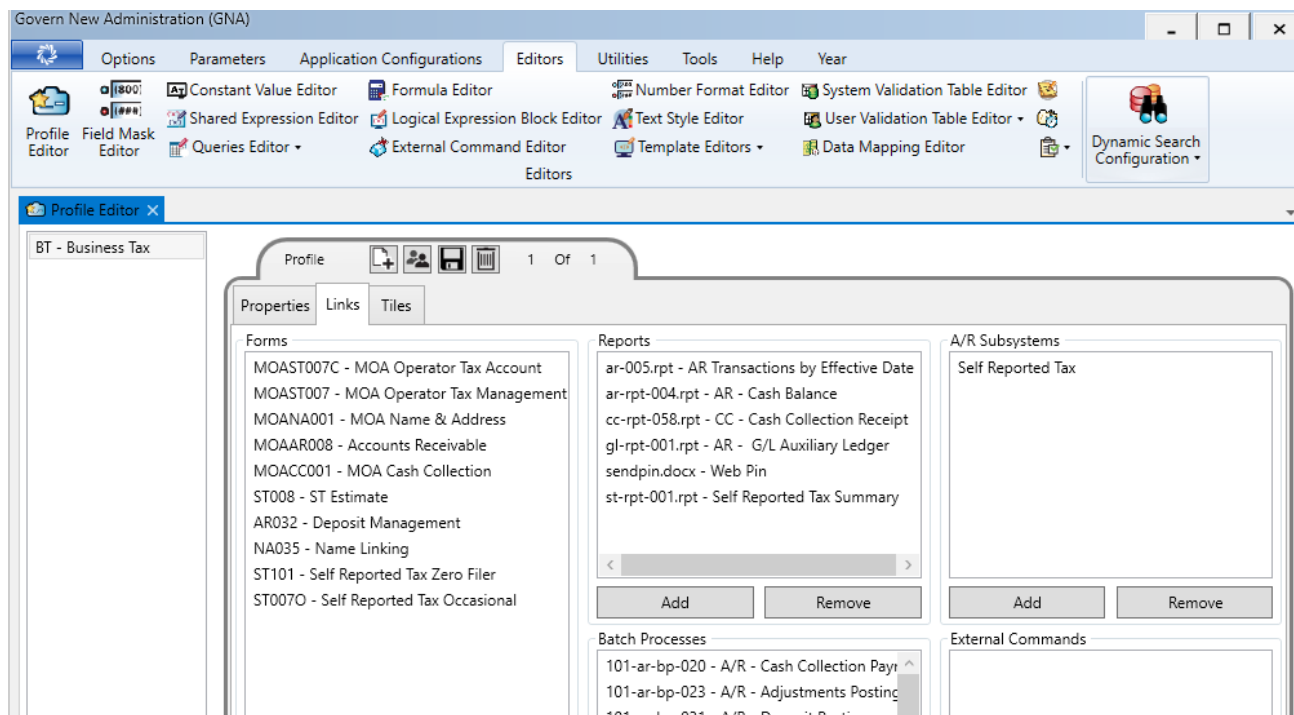
The final step is to make the report available to one or more profiles. This is done in GNA.

From the GNA ribbon...

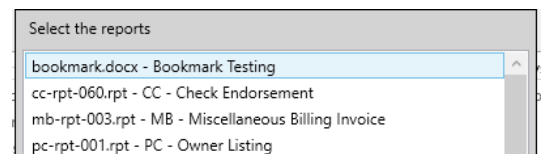
- Select Editors (tab) > **Profile Editor**.



- In the Profile Editor, select a profile from the list of available profiles on the left hand column.
- Under the *Profile* tab, click the **Links** sub-tab to the right.
- In the Reports group, click **Add** to display a list of reports previously added and made available to Govern.



- Select the reports you wish to make available to the selected Profile. Use the (CTRL + Click) and (Shift + Click) key combinations to select multiple reports at once.
- Once the report(s) are selected, click **OK** at the bottom of the form to add to the Profile.



7. On the Profile tab, click **Save** to conclude the process. The reports will now be listed in the Reports block.

Reports

ar-005.rpt - AR Transactions by Effective Date

ar-rpt-004.rpt - AR - Cash Balance

bookmark.docx - Bookmark Testing

cc-rpt-058.rpt - CC - Cash Collection Receipt

gl-rpt-001.rpt - AR - G/L Auxiliary Ledger

sendpin.docx - Web Pin

st-rpt-001.rpt - Self Reported Tax Summary

<

>

Add

Remove

APPENDIX – A

Sample Report

NOTICE REGARDING E-FILING AND E-PAYMENT OPTIONS

February 1, 2019

{{ Addressee }}
{{ AddressLine1 }}
{{ FreeLine3 }}

Dear Mr. {{ Addressee }}:

The City of Anywhere is pleased to announce the launch of the eGovern web-based service, which provides municipal taxpayers the ability to file Room Tax returns and pay Room Taxes online.

The eGovern web-based service allows taxpayers, or their designated representative, to securely access their tax account and related information online, 24 hours a day, 7 days a week, to perform the following functions:

- File self-reported tax returns
- Pay self-reported and property taxes
- Pay interest and penalties, if any
- View real property information payments

Online payments will be processed through a third-party vendor that is fully integrated with the eGovern service. The processing fee to pay with an e-check is as low as \$1.50, and the processing fee to pay with a credit card is 2.50% of the transaction. The complete fee schedule is posted on our website. The processing fee will be added to the total overall payment amount at the time of payment.

The link to the new eGovern can be found on the main page of the city website.

If you have any questions regarding the eGovern online filing and payment system, please contact our IT staff during normal business hours at (000) 111-2222 x333.

Sincerely,

Jane Dough
Manager, City