



Split Merge Function (067) v 4.7

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Split Merge Function (067) version 4.7.4

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DOCUMENT AUDIT		
v 2.4	2013-04-14	Original Split Merge Specification Report (Author Michelle Gagné Q&A)
V 2.8	2013-04-21	Added Multi-Year Transaction Option
V 2.9	2013-04-22	Final Review with programmer
V2.10	2013-04-23	Added Freeze Source Parcel on SAVE Add Manta Processing (Custom WPG) in Expected Results Section
V2.11	2013-04-29	Add Troubleshooting for Land Distribution Grid
V2.11a	2013-04-30	Land EDIT Button (Right-Click) in Split Merge Grid Destination Parcels. NOTE: It reacts like TRANSFER and the user can cancel year 1 but not year 2. Should not be used unless the land transaction needs to be rebalanced completely. (Added NOTE in GUI and Troubleshooting section)
V2.12	2013-05-02	Added the New Warning Message for Duplicate Split Merge Number (when auto-generate is set to off) and the number already exists for the year
V2.13	2013-05-17	Parameters – WARNING added for Land Cannot be duplicated Add Income example for Site Option Balancing Warning note on rounding was added in the Option Site Balancing section
V2.14	2013-05-22	Add Troubleshooting for Incomplete Income Transaction
V2.16	2013-10-02	Add Refresh Troubleshooting MultiYear Update LAND UNIT message on Finalize Add troubleshooting info Changes and new Business Rules ACTIVE / INACTIVE PROPERTY CONTROL BUSINESS RULES (EFFECTIVE & INACTIVE DATES)
v.2.17	2013-10-11	Extracted Property Control Business Rules (now stand-alone document) (forwards to bas)
V2.18		

GENERAL

The Split Merge (Replot) function is of critical importance for local government PROPERTY CONTROL as it affects the physical, legal, appraisal, assessment and monetary aspects of a property or business. 3 major areas are impacted:

- ✓ Physical: Cadastral change, Land Titles & Deeds...
- ✓ Property Control and Legal: Land Designation, Classification, Active / Inactive status...
- ✓ Value: Assessment and Taxation

Furthermore, the process is complex because it involves different groups, departments and services often causing a lengthy time span before its completion.

This function provides tools for the end-users to facilitate data entry and balancing and helps administrators by improving integration, communication, business rules validation throughout the process.

PRODUCT CHARACTERISTICS

Split Merge Function

- Visual GUI with Drag and Drop Grid
- From | To data Transfer (*if Keep Active*) or Copy
- Land Area Distribution Grid
- Undo & Delete until Finalized
- On Save Finalize Processing
- Proposed Parcel Status until Finalized
- Split Merge Multi-Year Option
- Site (Class & Liability) Balancing Option

Standard Product Features

- Data Duplication
- Audit Trail processing
- Snapshot recording of parcel prior characteristics (certified values, sales, audits, split merges)
- Customizable On Demand Action Buttons (Lists, Queries, Reports...)
- Customizable On Event Actions (Save, Create, Delete)
- Multiple Year Span & History Panel
- Global Messaging

Property Control Functions

- Parcel Genealogy (visual rendering and navigation)
- Process Workflow
- Multimedia *by Split Merge No. (KW?? SM# ou YEAR+SM#)* for information (related notes, pictures, reports, GIS snapshot...) or workflow related mandatory documents

Related Applications and Services

- Property Control API Services for 3rd party interaction (GIS)
- Govern Security Manager (GSM) for Alternate security

SPLIT MERGE FORM

The form is PARCEL ID based, YEAR ID driven and the REFERENCE KEY is the SPLIT MERGE NO.

SPLIT MERGE NO is auto-generated or entered manually by the user with the necessary access rights.

SPLIT MERGE *YEAR(S) and EFFECTIVE DATE is populated with the default System Registry Month (MM) & Day (DD) and the CURRENT FISCAL YEAR (ribbon). If system defaults are setup for MM/DD, the Split Merge Effective Date cannot be modified by the user. If not set, users with the necessary access rights can change it. *Effective and Next Year is displayed as a visual indication when in a MULTI-YEAR transaction mode.

FINALIZE TRANSACTION CHECKBOX is checked when the transaction is completed (workflow mandatory business rules have been met) and approved by the user with the necessary access rights.

***METHOD IN USE** the valuation method in use for the first parcel of the split merge transaction is displayed for information purpose. * **Warning symbol** will be displayed for visual notification when multiple appraisal methods are in used in the transaction. See Error Reporting and Site Balancing Option for more information.

FROM | TO GRID divided in two columns to show the FROM (Source) and TO (Destination) PROPERTIES with mouse driven DRAG and DROP to transfer property characteristics. Mouse **RIGHT-CLICK** to remove items

Expandable | Collapsible **PROPERTY DETAILS** listing physical elements (Land, Buildings, Miscellaneous Structures) appraisal (Site, Cost, Income, MRA, Personal Property) tax, assessment, permit, multimedia...

GRID BUTTONS

- [Add] Add existing property
- [New] Create new properties or Copy from source parcel data
- [Collapse] Collapse Source and Destination on grid and Uncollapse All

GRID VISUAL LEGEND indicates the physical status of items moved/inactivated or duplicated.

GRID TOTALS BY PROPERTY and SITE (optional) are displayed at the bottom of each column to help balance the transaction. [Expand] Can be expanded to show the site totals. Click again to hide.

SPLIT MERGE GRID (DESTINATION) Right-Click Edit Button: Once Land has been transferred to the destination parcels and the units have been balanced, the user SHOULD NOT use the Edit Button since it will react as a new land TRANSFER and the user will need to redo units.

ACTION BUTTONS

The form contains standard, function specific and customized ACTION BUTTONS. Each action button can be secured independently. New and Save are function specific and replace the open form standards. Setup is done in the model designer (MOD).

[NEW-SM] "New Multi-Year Split Merge" to create a 2 year-span transaction.

[NEW-SM-MY] "New Multi-Year Split Merge" to create a 2 year-span transaction

[SEND TO TREEVIEW] "Send properties to the tree view" with Append or Replace options. From there the user will be able to click on the different properties to view or modify it

[SAVE] AND [CANCEL] "Save" and "Cancel"

[REFRESH] "Refresh" the form with the new parcel totals after values have been calculated

[DELETE] "Delete" the transaction. Note: Once the transaction has been finalized (saved with the finalized flag checked) the transaction can no longer be deleted as permanent changes have occurred

[CUSTOM BUTTONS] "Customized Action button" for reports, queries and special actions can be added to the Split Merge Form

LAND DISTRIBUTION GRID

This grid is displayed when the land is moved across the is used to copy the land record from the SOURCE PARCEL to the DESTINATION PARCEL(S) and to distribute the amount by percentage, amount or units (square feet). The Year of the original land records is displayed on the top left corner.

For MULTI-YEAR transactions, the grid will be displayed twice, once for each YEAR.

SELECT PARCEL(S) For selecting the parcel(s) that will receive the land. Click in the box on the left of the parcel(s) to be selected “Checked Mark” and click again to unselect. Click on the top to **SELECT ALL**.

DISTRIBUTION MODES

AUTOMATIC & EQUAL DISTRIBUTION to distribute the land equally amongst selected parcels. The last selected parcel will receive the additional unit for rounding purposes.

AUTOMATIC only for user input of 1 of the 3 fields (percentage, amount or units). The system will automatically calculate the 2 others proportionally.

TIP: Unselect and Select the last parcel in the grid to automatically fill in the distributed amounts with the remaining balance.

MANUAL when “Automatic” and “Equal” are unchecked. For user input of the percentage, amount AND units.

DIFFERENCES if any, are displayed in RED when the land distributed amounts does not equal the original land amounts.

NOTE: This will NOT prevent the user from saving or finalizing the split merge transaction.

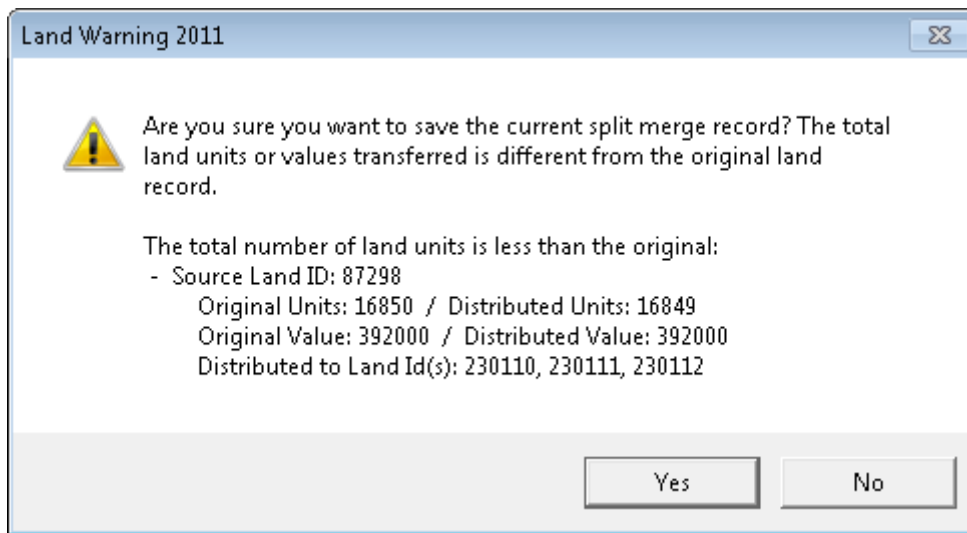
USER ERROR & WARNING NOTIFICATION

ON FINALIZING

Warning Message 1 – Are you sure you want to finalize this transaction? It is important to verify that all the values are correct. These are used in the final computation and cannot be changed after you finalize the transaction.

If you finalize a transaction in which the land units are different, the system will display the following warning to the user:

Warning Message 2- Are you sure you want to save the current split merge record? The SOURCE and DESTINATION units will be displayed for each year.



ON SAVING

Warning Message 3 - The split/Merge number {0} already existed in the database, please choose another number.

TIP: Unless generated by a 3rd party, organizations should use the AUTOMATED GENERATION of SPLIT MERGE NUMBER OPTION as defined in the parameters.

SITE BALANCING (OPTION)

Error Message 1 -The CAMA Property Information Method in Use is different for the two years for the current parcel. The Split/Merge won't balance.

Error Message 2 -The CAMA Property Information Method in Use is different for at least one parcel. The Split/Merge won't balance.

Error Message 3 -The CAMA Property Information Method in Use is different for the parcel you are adding. The Split/Merge won't balance.

OTHER USER FUNCTIONALITY

NAVIGATION

During the transaction, the user can navigate between the different parcels (FROM|TO) involved in the transaction for look-up or modification purposes. The user can change the active parcel by double-clicking on the desired parcel in the tree view.

The [SEND TO TREEVIEW] action button is used to either APPEND the parcels to the existing ones in the treeview or to REPLACE it with only the parcels involved in the split merge transaction.

TIP: Saved dataset can be also be used for easy retrieval of parcels involved in the split merge. The Subdivision and Lot information can also be used when creating destination parcels.

GLOBAL MESSAGING

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

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

USER AUDIT TRAIL

The Split Merge transaction generates historical information and user audit trail records (USR_AUDIT_TRAIL table). The data can be retrieved via a report, query or special form ... previously setup by the System Administrator.

In addition, standard audit is generated (old and new value) when the Business Entity or Business Entity Field Audit Trail Property is set to "TRUE".

TIP: The Split Merge audit trail should be used to review the finalized transaction.

CUSTOMIZED BALANCING REPORT (OPTION)

In order to help the user with the split merge transaction a report can be used and setup on the form. The report is customized based on the organisation process and business rules. A customized view can be used to prepare the data for the report by getting the needed information and grouping it in the correct manner for sub-totals and totals.

Report: [SplitMerge.rpt] Report View: [VW_LAND_SUM_LOT_SIZE_BY_SITE]

NOTE: Parcels with missing Land and/or Site data will NOT appear on the report. 'Values not available' will appear in place of the amounts if the parcel(s) have not been recalculated by the system (Daemon).

PARAMETERS (ADMINISTRATOR)

SYSTEM REGISTRY PARAMETERS (SETUP IN GNA – SYSTEM REGISTRY)

The following parameters are used to setup system defaults, activate standard features and options or setup customized information.

- PROPERTY CONTROL **NON PARCEL TYPE** default to create new parcels as non-parcels (ex: propose parcels).

NOTE: Will revert back to regular parcels when the split merge transaction is finalized

- PROPERTY CONTROL **APPROVED SUBDIVISION** and **VIRTUAL PARCEL** default for new parcels created
- BR GIS **Replot GIS MULTIMEDIA CODE** used to link a GIS SNAPSHOT to the split merge transaction
- SPLIT MERGE **EFFECTIVE MONTH (MM)** and **DAY(DD)** default for split merge transaction.

Set to **01/01** for transactions made in roles or fiscal years still open for modifications (see Business Rules)

- SPLIT MERGE [SITE BALANCING](#) option (see *Site Balancing Option* for more details)
- SPLIT MERGE [MULTI-YEAR](#) option (see *Multi-Year Option* for more details)
- GENERAL USE SATELLITE SYSTEMS ([Custom WPG](#))
- GENERAL SATELLITE SYSTEMS CURRENT YEAR ([Custom WPG](#))

APPRAISAL AND TAX PARAMETERS ([SETUP IN GOVERN FOR WINDOWS ADMINISTRATOR](#))

The following are YEAR SPECIFIC and need to be set for each module involved in a split merge transaction (Mass Appraisal, Tax, Permits and Inspections, etc.)

- [HISTORY FOR CURRENT YEAR](#) is used to set the Organization HISTORICAL STATUS for Appraisal and/or Tax.
NOTE: Impacts property control effective and inactive dates will be set when a split merge transaction is finalized (see *Business Rules & Error Reporting* for more information)
NOTE: In version 4.7.4. +, the history status is set at the DETAIL LEVEL for Appraisal and Tax based on the [HISTORY_ONLY](#) flag found in MA_MASTER, RE_ ASSESSMENT ...
- [ROLL FORWARD](#) is used to automatically roll forward the changes initiated by the split merge process to the destination parcel(s) future year(s) already initialized
- [INCREASE/DECREASE](#) is used when Physical and Equalization changes need to be calculated and displayed MG?? BUG

DATA DUPLICATION ...PARAMETERS ([SETUP IN GOVERN FOR WINDOWS ADMINISTRATOR](#))

The following setup is used to determine what information from the SOURCE parcel will be duplicated to the DESTINATION parcel(s). Browse through the functions and check the tables that should be copied.

WARNING: If the **Duplicate Function** is used to create the DESTINATION parcel(s), it is mandatory to copy MA_MASTER (Values) so that they inherit the Current SOURCE Parcel appraisal valuation METHOD-IN-USE and NOT copy LAND (the **Split Merge Function** creates NEW apportioned land records).

AUDIT TRAIL SETUP ([SETUP IN BUSINESS ENTITY DESIGNER](#))

- [BUSINESS ENTITY](#) Record/Transaction Audit (creation , deletion, modification information)
- [BUSINESS ENTITY FIELD](#) Audit at the Field Level (old value / new value)

SPLIT MERGE BUSINESS RULES

The following PROPERTY CONTROL business procedures and data validation rules are enforced in the split merge function.

GENERAL

PHYSICAL BUILDING

A physical building cannot be split or merged. If the “KEEP ACTIVE” parameter is checked (true) the building will be transferred to the selected destination parcel otherwise it will be copied.

INFORMATION LINKED TO BUILDINGS

All information linked to a building will be transferred or copied along with it. The items linked will not show as a separate item in the SOURCE and DESTINATION grid. Appraisal details (income, MRA multimedia, etc.) will be copied to each DESTINATION parcels as well as Linked Components (Income stream, Misc. Structure, Building to building links)

WARNING: The first year the premise will be linked to the original building and the second year the premise will be linked to the new building created during the split merge process.

SOURCE PARCEL(S) VALUATION METHOD VALIDATION

In order to balance SOURCE and DESTINATION parcels, the valuation method needs to be the same for all parcels and all years (Multi-Year) involved in the transaction. Validation will occurred and error messages displayed when saving the transaction or when adding (the first time only) a parcel with a different valuation method in use.

FINALIZED TRANSACTION

SPLIT MERGE FORM IS DISABLED

Once a transaction is finalized it cannot be undone. A warning message is displayed when the user first saves with the FINALIZED FLAG checked. After the save, the flag will be greyed out and the delete and other action buttons will be disabled (see Error & Warning Notifications – Warning Message 1 & 2).

TIP: Once the transaction is saved with the finalized flag checked, the transaction is irreversible. Security can be set so that only administrators, managers and/or super users can modify this field. Alternate security is used when the transaction can occurs in a year different than the Profile Fiscal Current Year (yellow dot).

SOURCE PARCEL(S) SNAPSHOT IS CREATED

Once the split merge transaction has been finalized, the FROZEN_ID of the source parcel for the SPLIT MERGE YEAR and SUBSEQUENT years will be set to -32766.

NOTE: The HISTORY PANEL can be used to view the HISTORICAL DATA of the parcel split merge frozen information.

DESTINATION PARCEL(S) DATA IS ROLL FORWARD

The system will roll forward the destination parcels characteristics if they exist in subsequent years.

DESTINATION PARCEL(S) HISTORY_ONLY FLAG IS SET

The system will check the source parcels for a given year and as soon as 1 property is set to HISTORY_ONLY, all destination parcels for that year will be set to HISTORY_ONLY.

PROPERTY CONTROL BUSINESS RULES (EFFECTIVE & INACTIVE DATES)

GOVERN STANDARDS

See General Property Control Rules: *(to be or not to be)*

FINALIZE SPLIT MERGE TRANSACTION RULE

When a split merge transaction is finalized the system sets the EFFECTIVE, INACTIVE Year and Dates for the source(s) and destination parcel(s) depending on the type of transaction (Regular or Multi-Year) based on the Effective Month and Date 01/01 Option OR the Historical Status of the source parcel.

The Historical Status is determined at the detail record level when the field HISTORY_ONLY is true (set to -1) in MA_MASTER for Appraisal and TX_RE_ASSESSMENT for Real Estate Tax. Note: If 1 of the records in the SOURCE is HISTORY_ONLY, all parcels in the SOURCE will be considered as HISTORY_ONLY.

EFFECTIVE 01/01 DAY & MONTH (OPTION=ON)

Split Merge (SM) Year = **2011** Current Fiscal Year

*REGULAR	Effective YEAR	Effective Date	Inactive YEAR	Inactive Date
Source	original	original	SM Year 2011	SM Year 01-01-11
Destination	SM Year 2011	SM Year 01-01-11	9999	--

*MULTI-YEAR	Effective YEAR	Effective Date	Inactive YEAR	Inactive Date
Source	original	original	SM Year + 1 2012	SM Year + 1 01-01-12
Destination	SM Year 2011	SM Year 01-01-11	9999	--

HISTORY ONLY - EFFECTIVE DAY & MONTH (OPTION=OFF)

Split Merge (SM) Year = **2011** Current Fiscal Year

*REGULAR	Effective YEAR	Effective Date	Inactive YEAR	Inactive Date
Source	original	original	SM Year + 1 2012	SM Year Effective date
Destination	SM Year 2011	SM Year 01-01-11	9999	--

*MULTI-YEAR	Effective YEAR	Effective Date	Inactive YEAR	Inactive Date
Source	original	original	SM Year + 2 2013	SM Year Effective date
Destination	SM Year 2011	SM Year 01-01-11	9999	--

NOT HISTORY ONLY - EFFECTIVE DAY & MONTH (OPTION=OFF)

Split Merge (SM) Year = **2011** Current Fiscal Year

*REGULAR	Effective YEAR	Effective Date	Inactive YEAR	Inactive Date
Source	original	original	SM Year 2011	SM Year Effective date
Destination	SM Year 2011	SM Year 01-01-11	9999	--

*MULTI-YEAR	Effective YEAR	Effective Date	Inactive YEAR	Inactive Date
Source	original	original	SM Year + 1 2012	SM Year Effective date
Destination	SM Year 2011	SM Year 01-01-11	9999	--

OPTION: SITE (CLASS & LIABILITY) BALANCING

This option (SY_REGISTRY) is used to balance the source (FROM) and destination (TO) parcel(s) "Total Appraised Value" by site class and liability. Value Overrides and Automatic Creation of Site, MRA and Income Records will be created to balance the split merge transaction and avoid increase/decrease in site (class and liability) values.

MRA Balancing

APPORTION FROM and balance TO Total Appraised Values by Site

Subtract Site Land Allocation from Site Total MRA value.

Apportion the remaining balance based on **BUILDING LIVING AREA** of the TO proposed parcels.

INCOME Balancing

APPORTION FROM and balance TO Total Appraised Values by Site

Subtract Site Land Allocation from Site Total INCOME value.

Apportion the remaining balance to the **NEXT TO** proposed parcels.

Mandatory Parameter Setup

- ✓ Site (Class & liability) Balancing feature is turned ON (✓ checked)
- ✓ Keep Active default is set to *No (unchecked)*
- ✓ Parcel Duplication Flags need to be checked (✓) for tables MA Master *Values*, Owners, Location, Legal, Area and all tables with fields used or having an impact in calculations. MA SITE is optional (either on or off)

Mandatory Business Rules for Balancing

- ✓ All FROM Parcels have the same Appraisal Method in Use
- ✓ If method in use = 3 or 4, need at least one INCOME (3) DIR or (4) GRM record per site
- ✓ If method in use = 8, need at least one MRA record per site

WARNING: As a standard business rule in Govern Appraisal Computation, NO rounding occurs if the final value is by OVERRRIDE. If the detail components are not rounded (ex. Land records, income detail streams) the destination total values will not be rounded as well.

Value by Income Example(method in use = 8) with Income Detail NOT LINKED to building example					
FROM	*Area	Total	TO	%	Total
*** Parcel 1 ***			*** Proposed 1 ***		
Land [Site]-ID-PUC-LUSE			Land Distribution		
[1-T-10]-L001-P10 Primary	6 000	90 000	[1-T-10]-L001-P10 (50%)	50%	45 000
[1-T-10]-L002-P10-Excess A	4386	30 000	[1-T-10]-L666-P10 Primary (50%)	43860	30 000
[1-E-60]-L003-P40-Exempt	0	0	Building		
	4386		[1-T-10]-B001-Main Street	4000	0
Building [Site]-ID-seq-LOC	0		Income		
[1-T-10]-B001-Main Street		0	[1-T-10]-S001-01-Apt (100%)	6000	15 000
			*** Proposed 2 ***		
Income [Site]-ID-Stream-Cat			Land	2000	100 000
[1-T-10]-S001-01-Apt	4000	200 000	[1-E-60]-L003-P40 -Exempt (100%)		
[1-T-20]-S002-02-Retail		100 000	[1-T-10]-L002-P10-Excess A (100%)		
			Income		
*** Parcel 2 ***			[1-T-10]-	0	0
Land [Site]-ID-PUC-LUSE	2000	33 000	[1-E-60]-	0	30 000
[1-T-10]-L666-P99 Vacant Lot	4000	160 00	*** Proposed 3***	0	0
[1-T-20]-L667-P40 Commercial			Land		
			[1-T-10]-L001-P10 (50%)		
Income [Site]-ID-Stream-Cat	--	80 000	[1-T-10]-L666-P10 (50%) Primary	0	0
[1-T-20]-S001-90-Parking Space			[1-T-10]-L002-P10 (100%) Excess	0	0
			[1-T-20]-L667-P40 (100%) Comm		
			Income		
			[1-T-20]-S002-02-Retail (100%)		
			[1-T-20]-S001-90-Parking (100%)		
			[1-T-10]-		

*Area= in Square Feet for Land (Acres to Sq Feet transformation), in Living Area (use parameter) for Building, in Units for Miscellaneous Structures

OPTION: MULTI-YEAR TRANSACTION

The multi-year option provides the ability of having a split merge transaction for a 2 year process time-line span. This option is NOT supported in the Property Control API WEB Services for split merges. The split merge will be recorded in the parcel genealogy for year 1, but both years will be balanced and set.

See Actions and Expected results for the difference between the type of transactions

TECHNICAL INFORMATION

TABLES

The form is PARCEL ID based, YEAR ID driven and the REFERENCE KEY is the SPLIT MERGE NO.

- PC_GENEALOGY

VIEWS

- V_PC_SPLIT_MERGE_ALL (For report)

- V_PC_SPLIT_MERGE (Standard)
- VW_LAND_SUM_LOT_SIZE_BY_SITE (Balancing Option)

RESOURCES

- The Global Message (option) can be changed in the resource file. KEY: PC, SPLITMERGE, MSG_PARCELWITHSPLITMERGE

USER AUDIT TRAIL

The Split Merge transaction generates historical information and user audit trail records (USR_AUDIT_TRAIL table). The data can be retrieved by the following fields:

Business Entity Name	[BED_NAME]	wpg: PC_SplitMerge
Model Code	[MD_CODE]	wpg: ParcelInfo
Reference Code	[REF_CODE]	"SM "
Reference ID	[REF_ID]	Split Merge transaction Number (group by)

For Buildings and Building Linking information, you can retrieve the data by MASTER Building ID, MASTER Building Sequence Building ID, Building Sequence and Link ID.

BEFORE GETTING STARTED

Verify the General System Parameters (data duplication, parcel creation defaults...) and set the Property Control & Split Merge Defaults and options (on-time only).

Plan ahead (review the data, validate that the split merge business rules are met) and decide on the best course of action to be the most effective.

When ready....

Validate that at least one Govern Batch Daemon is running.

Change the year if needed

Start the process and create a NEW split merge transaction.

TROUBLE SHOOTING

SOURCE VALUES VALIDATED AND COMPUTED?

The source records should be validated (sites, values, details) and recalculated beforehand in some cases (if data is imported, or were converted....) to make sure the values are good.

Recompute Source and Destinations for all years and see if total value changes

Load all parcels in the tree view, and re-compute each value for each year (source and condo complex)

BATCH CALCULATION DAEMON

At least one Daemon (Govern Batch) must be running in order to compute the parcels involved in the transaction.

DEAMON REFRESH BUTTON (Multi-Year Transaction) -Run it on your machine if you can

If the user has hit the REFRESH button before ALL YEARS have been computed, saving the record again will reactivate the button. If the daemon is not accessible to the user to make sure all entries had been processed, it would be a good idea to hit save again.

SPLIT MERGE GRID right-click Edit Button

Once Land has been transferred to the destination parcels and the units have been balanced, the user SHOULD NOT use the Edit Button since it will react as a new land TRANSFER and the user will need to redo units.

INFORMATION linked to BUILDINGS in Multi Year Transactions

Dates are very important in the multi-year split merge transactions since the first year the premise will be linked to the original source parcel and the second year the premise will be linked to the destination parcel and new building.

SPLIT MERGE ACTIONS and EXPECTED RESULTS

The following table identifies the ACTIONS & EXPECTED RESULTS for REGULAR & MULTI-YEAR split merge transactions.

SPLIT MERGE FUNCTION EXPECTED RESULTS		
ACTION	REGULAR	MULTI-YEAR
On NEW Action Button	REGULAR Split Merge LOAD Grid and PREPARE Split Merge Transaction ✓ All appraisal items of CURRENT PARCEL are displayed in the Grid LOAD EFFECTIVE DATE ✓ Effective year is showed ✓ Effective Date is loaded YEAR = Current Fiscal Year MONTH/DAY = System parameter or Current Menu date * Date is NOT MODIFIABLE if MONTH/DAY parameter is set APPLY ON LOAD BUSINESS RULES ✓ Global messages	MULTI-YEAR Split Merge LOAD Grid and PREPARE Split Merge Transaction ✓ All appraisal items of CURRENT PARCEL and NEXT YEAR are displayed in the Grid LOAD EFFECTIVE DATE ✓ Effective year and NEXT year is displayed ✓ Effective Date is loaded (same) APPLY ON LOAD BUSINESS RULES (same)
On ADD Existing Parcels in Grid	BUSINESS RULE VALIDATION ✓ Method in used warning	BUSINESS RULE VALIDATION (same)
On ADD New Proposed Parcels	DUPLICATE PROPERTIES ✓ Create New Property (s) Empty or Duplicate the New Property (s) using <i>FROM Current Parcel</i> Tables set to Duplicate in the Govern for Windows Parameters BUSINESS RULE VALIDATION ✓ Method in used warning (only for the FIRST parcel) GENERATE USR AUDIT TRAIL ENTRIES ✓ For New parcels created: Audit type = "New" <i>See Audit Trail</i> SATELLITES SYSTEMS ✓ No proposed parcel is sent to the Satellite Systems	DUPLICATE PROPERTIES (same) BUSINESS RULE VALIDATION (same) GENERATE USR AUDIT TRAIL ENTRIES (same) SATELLITES SYSTEMS (same)
On MOVE FROM TO INFO	COPY / MOVE Data to Destination ✓ Create NEW Building (Copy) to DESTINATION ✓ Create NEW Misc. Structure (Copy) to DESTINATION	COPY / MOVE Data to Destination (CURRENT AND NEXT YEAR) ✓ Create NEW Building (Copy) to DESTINATION YEAR 1 and 2 ✓ Create NEW Misc. Structure (Copy) to DESTINATION

	<ul style="list-style-type: none"> ✓ Create NEW Income & MRA (Copy) to DESTINATION 	<p>Year 1 and 2</p> <ul style="list-style-type: none"> ✓ Create NEW Income & MRA (Copy) to DESTINATION Year 1 and 2
On MOVE FROM TO LAND	<p>COPY Data to Destination</p> <ul style="list-style-type: none"> ✓ SHOW GRID CURRENT YEAR ✓ DISTRIBUTE Land to ALL selected PROPOSED PARCEL(S) <i>Copy record and Override Total Value with the Grid amount</i> ✓ GENERATE MRA & INCOME records to match LAND AMOUNT transferred 	<p>COPY Data to Destination (YEAR 1 and YEAR 2) (same but for BOTH years)</p>
On SAVE Split Merge transaction	<p>CREATE/SAVE SPLIT MERGE TRANSACTION</p> <ul style="list-style-type: none"> ✓ Split Merge Transaction (Number, Effective date, FROM and TOs) is recorded and displayed ✓ Parcel Genealogy Transaction is recorded <p>APPLY ON SAVE BUSINESS RULES</p> <ul style="list-style-type: none"> ✓ Split Merge Business Rules ✓ User defined cross edits and validation (NONE) <p>GENERATE USR AUDIT TRAIL ENTRIES</p> <ul style="list-style-type: none"> ✓ Split Merge Transaction for the FROM and TO parcels REF_ID = Split Merge no. REF_CODE = "SM" ✓ TO parcels: Audit type = New, BE_NAME = Split Merge + Tables affected by the Split Merge <p>GLOBAL MESSAGE</p> <ul style="list-style-type: none"> ✓ Add KEY_TYPE and KEY_VALUE to Global message if does exists <p>SEND TO DAEMON (COMPUTE)</p> <ul style="list-style-type: none"> ✓ Send all FROM and TO parcels to Daemon to compute Site and Property Totals ✓ Update Split Merge Form Grid Totals and Grand Totals ✓ Update Refresh Button Status (visible/invisible) when Daemon completed <p>FREEZE SOURCE RECORDS</p> <ul style="list-style-type: none"> ✓ Create Snapshot of Source parcels if History_only = -1 	<p>CREATE/SAVE SPLIT MERGE TRANSACTION</p> <p>(same)</p> <p>APPLY ON SAVE BUSINESS RULES</p> <p>(same)</p> <p>GENERATE USR AUDIT TRAIL ENTRIES</p> <p>(same)</p> <p>GLOBAL MESSAGE</p> <p>(same)</p> <p>SEND TO DAEMON (COMPUTE)</p> <p>(same but for BOTH YEARS)</p> <p>FREEZE SOURCE RECORDS</p> <ul style="list-style-type: none"> ✓ Create Snapshot of Source parcels if History_only = -1 based on the year
On SAVE Balancing OPTION	<p>The Parcel(s) VALUE BY (<i>method in use</i>) and the Appraisal Record DEPENDENCIES (<i>Linked to</i>) will dictate the technique to use for distribution and balancing.</p> <p>BALANCE BY SITE METHOD IN USE = INCOME</p>	<p>BALANCE BY SITE METHOD IN USE = INCOME</p> <p>(same but for both years)</p>

	<ul style="list-style-type: none"> ✓ Set Minimum INCOME amount for each parcel and site to account for the Land Value ✓ Apportion remaining INCOME amount to next available TO parcel <p>BALANCE BY SITE METHOD IN USE = MRA</p> <ul style="list-style-type: none"> ✓ Set Minimum MRA amount for each parcel and site to account for the Land Value ✓ Apportion remaining MRA amount based on Building EFFECTIVE AREA. <p>BALANCE BY SITE METHOD IN USE = COST</p> <ul style="list-style-type: none"> ✓ Based on Physical elements transferred 	<p>BALANCE BY SITE METHOD IN USE = MRA (same but for both years)</p> <p>BALANCE BY SITE METHOD IN USE = COST (same but for both years)</p>
On DELETE	<p>RESET PROPERTY CONTROL SOURCE PARCELS</p> <ul style="list-style-type: none"> ✓ CANNOT Remove the -1 records it had created ✓ CANNOT Remove the parcels that were created ✓ Reactivate the source parcels (from – 32766 to 0) ✓ Remove the MRA and Income record created ✓ Delete Split Merge and Parcel Genealogy Transaction <p>GENERATE USR AUDIT ENTRIES for BUSINESS ENTITIES</p> <ul style="list-style-type: none"> ✓ Function Code = Delete for FROM and TO parcels REF_ID = Split Merge no. REF_CODE = "SM" 	<p>RESET PROPERTY CONTROL SOURCE PARCELS (same)</p> <p>GENERATE USR AUDIT ENTRIES for BUSINESS ENTITIES (same)</p>
On SAVE FINALIZED	<p>DISPLAY WARNING MESSAGE</p> <p>SEND TO DAEMON (COMPUTE)</p> <ul style="list-style-type: none"> ✓ Send all FROM and TO parcels to Daemon to compute Site and Property Totals <p>SAVE TRANSACTION RECORDS (if updated)</p> <ul style="list-style-type: none"> ✓ Split Merge and Parcel Genealogy is updated <p>SET SOURCE PARCEL FROZEN ID</p> <ul style="list-style-type: none"> ✓ Set Frozen ID to -32766 for all SOURCE Parcels (CURRENT YEAR and all FUTUR YEARS) <p>SET PROPERTY & BUILDING EFFECTIVE / INACTIVE DATES</p> <ul style="list-style-type: none"> ✓ SET FROM and TO parcel(s) EFFECTIVE & INACTIVE DATE ✓ SET FROM and TO building(s) EFFECTIVE & INACTIVE DATE 	<p>DISPLAY WARNING MESSAGE</p> <p>SEND TO DAEMON (COMPUTE) (same)</p> <p>SAVE TRANSACTION RECORDS (if updated) (same)</p> <p>SET SOURCE PARCEL FROZEN ID (same)</p> <p>SET PROPERTY & BUILDING EFFECTIVE / INACTIVE DATES (same but different dates)</p> <p>CHANGE DESTINATIONPARCEL STATUS (same)</p> <p>CREATE AUDIT ENTRIES :</p>

<p>CHANGE DESTINATION PARCEL STATUS</p> <ul style="list-style-type: none"> ✓ CHANGED TO parcel(s) TYPE from PROPOSED to Regular Parcels <p>CREATE AUDIT ENTRIES :</p> <ul style="list-style-type: none"> ✓ For all TO parcels BED_NAME = Split Merge, MD_CODE = ParcelInfo, TABLE_NAME = PC_GENEALOGY <p>CALL SATELLITE WPG SYSTEMS</p> <ul style="list-style-type: none"> ✓ Call Valcura if needed ✓ Call Auto-Comp to generate new Comparable Sales ✓ Send FROM and TO properties to MANTA (Type = REPLOT) for year of split merge ✓ Send FROM parcels subsequent years to MANTA (when transaction made in prior years) Change reason = 14-2 ✓ Send FROM and TO properties to ASSESSMENT PUB (Type = REPLOT) <p>See MANTA Processing</p>	<p>(same)</p> <p>CALL SATELLITE WPG SYSTEMS</p> <ul style="list-style-type: none"> ✓ Call Valcura if needed ✓ Call Auto-Comp to generate new Comparable Sales ✓ Send FROM and TO properties to MANTA (Type = REPLOT) for year of split merge ✓ Send New Properties (changed from Proposed to Regular for Year 2) ✓ Send FROM parcels subsequent years to MANTA (when transaction made in prior years) Change reason = 14-2 ✓ Send FROM and TO properties to ASSESSMENT PUB (Type = REPLOT). Year 1 will be used for the REPLOT information and the properties will be sent for the second year. <p>See MANTA Processing</p>
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MANTA Processing (Custom WPG)

DESTINATION PARCEL(S)

After finalizing a replot, there should be two records in the UPLOAD_PROPERTY table:

- 1) one for the creation of the new property in Manta (NEW_PROPERTY column = 1)
- 2) and one to process the REPLOT assessment transaction (ASSESSMENT_CHANGED_FLAG = 1)

The UPLOAD_ASSESMENT_TRAN will only have one record, associated with the UPLOAD_PROPERTY row where ASSESSMENT_CHANGED_FLAG = 1

All the other UPLOAD tables should have a row related to the UPLOAD_PROPERTY table where NEW_PROPERTY = 1

SOURCE PARCEL(S)

After finalizing a replot there should be one record in UPLOAD_PROPERTY with ASSESSMENT_CHANGED_FLAG = 1 and an associated row in UPLOAD_ASSESMENT_TRAN with negative values. This is setting the parent to 0 value as part of inactivating it in Manta.

This is the record that you are showing below.