IMS

INFORMATION MANAGEMENT SERVICES, INC.

Citizen Services

User's Manual

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Warranty

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Getting Started

**This manual is best viewed at 100% magnification
or higher for details on small screens**

Welcome Welcome to the **Citizen Services**.   Code enforcement becomes more complex each year, and without a tool like IMS **Citizen Services** can be a nightmare. Every incident is assigned a case number, and all subsequent follow-up activity is tracked by date, description, district, department, location and more. The design allows for each action to be taken in response to a violation to generate a letter or notice, and upon rescheduling, another action can begin.

Citizen Services may share the property database of IMS **Building Permits Manager**, or may use its own database. With this feature the user can view the permits, property, owners, inspections, fees, etc. for a particular property to see if a permit has been pulled to correct current violations. It prints form letters and reports that you may customize to your needs. A few clicks will tell you everything that has happened starting with who reported it and continuing until it is resolved. Unless you have unlimited staff you need **Citizen Services**.

Citizen Services tracks code enforcement issues by reporter, property, and record number.   It allows for user-defined stages to deal with code enforcement issues and can create customized letters to send at

different stages of enforcement. It tracks and allows reporting of chronic problems and allows code enforcement officers to spend more time in the field than on paperwork.

It also has the ability to print custom reports that you create. The 32 bit version will be installed on Windows 95, 98 and NT systems in the original program that your **Customer Support Representative** (**CSR**) provides. When converting data files from versions prior to 2.100, case numbers are automatically formatted according to the old system.

System Requirements

Hard disk with 10 MB free disk space
Microsoft Windows 32 bit environment - Windows 9x, Windows NT 4.0, 2000 or higher
Building Permits Manager version 4.300 or higher
General Ledger version 4.250 or higher
VGA graphics and monitor
Any pointing device supported by Windows

The new IMS demo and option control system works for existing users who have a license file containing installed options when version 2.110 is installed. If there is no license file, then certain options will not be installed on all systems. The demo program expires 30 days after it is first used.

This release of **Citizen Services** is compatible with the IMS menu system. The IMS menu system allows running all installed IMS programs from a single login, bypassing individual program logins and splash screens.

Installation of Updates

This is where it all begins. Check with your **CSR** and read all Release Notes for directions on converting files from older versions.   You will need to periodically install updates as new information is added to the program. As long as your update is saved into the correct directory the original program will use it.
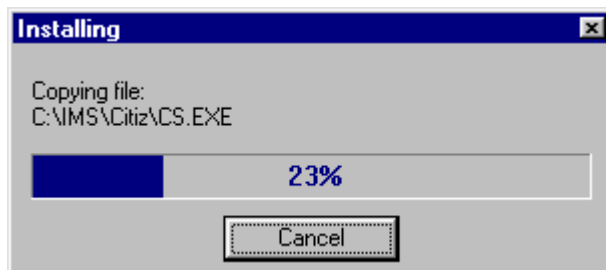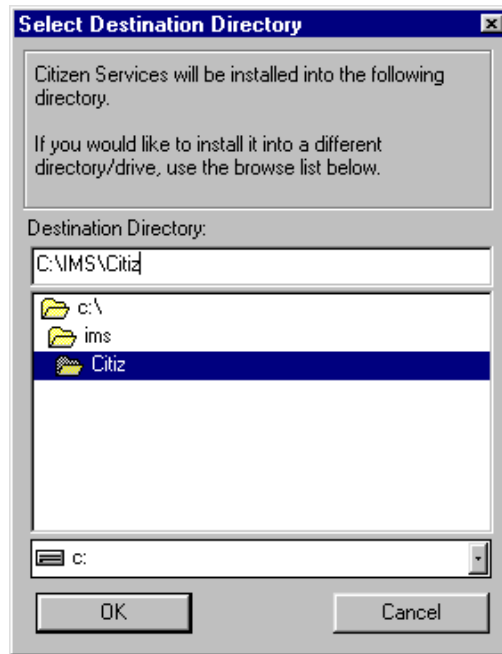
When installing, TYPE in the directory (ex. C:, D:, or E\CS): you want the program to go, otherwise it tends to default to a directory that it creates below the main directory (C:\CS\CitizenServices). This means the program will not find it and consequently not work. You also do not want it saved into C:\Program Files. This will not allow it to work either.

Windows Basics for 95/98/NT Users

Start Windows if you've not already done so. Insert the Update disk into drive A (or drive B). You first need to find where your **Citizen Services** program is installed. Find the icon on your main screen (Program Manager) and highlight the **Citizen Services** icon, and right click with your mouse on the icon. Select File, Properties, and click on the Shortcut Tab. The line you want to look for will be labeled as Target. There you will be able to view the directory you need to place the update into. Once you have determined which directory to install into, you are ready to start the installation process. Left click on Start; Select Run from the File menu and then Browse, selecting the .exe file on the diskette in Drive A: and double click on the .exe file to begin the installation.

The program will start installing and you will see a blue screen, and then a welcome screen. It will ask you which directory you want to install the files into. Make sure it is exactly where it needs to be as the data for the program is located in the same directory as the program files (see above on how to locate your directory).

In Windows 95/98/NT the default is C:\Program Files\CS. You may **not want this directory,** so TYPE IN the location to the directory you found the program in (using the directions above). Click OK when you've entered the desired location. It will ask you if you want to make backup copies and will backup the program files that the update replaces into the same directory, into a new folder called BACKUP. After this simply follow the instructions and it installs the update for you.

Select Destination Directory

Citizen Services will be installed into the following directory.

If you would like to install it into a different directory/drive, use the browse list below.

Destination Directory:

C:\IMS\Citiz

- c:\
  - ims
    - Citiz

c:

| OK | Cancel |

Installing

Copying file:
C:\IMS\Citiz\CS.EXE

23%

Cancel

After it is complete, you will be given the opportunity to view the release documentation. This is a document containing information and explanation about what is new to this version of the **Citizen Services**, including last minute changes since the manual was printed.

The release documentation for new releases can always be viewed at the IMS website, http://www.ims-florida.com. The site will always have the latest release information. The release notes can also be viewed once the program is installed under **Help, Contents, Release Notes**. You may link to the IMS website from within the program if you are connected to the Internet and go to **Help,** IMS Web Site.

Windows 95/98/NT Internet Users

The examples show c: drive, but most users will have their program located on d, g, or f. or some other drive.

Updating from email:

Your **CSR** will send you updates in the email if you request this method of updating. When you receive the emailed files (for example cs2051.exe, cs02,.cs03) save them immediately into the directory that your program is running in. See the Windows update installation instructions above to see how this is done. Once you have saved all of the files you receive in the email from IMS, then you may go into My Computer by right clicking on it, and choosing Explore. From there, locate the .exe file and double click on it to run the installation, following the instructions on the screen. Remember to TYPE in which drive and directory you want the program to install into, such as D:\CS.

Updating from a disk:

Insert the Update disk #1 into drive A (or drive B). In Win 95/98/NT right click on My Computer, select explore. Highlight the drive (A or B) that the disk is in. Find the file, Setup.exe and double click on it. (See the above installation instructions for Windows updates). Insert Disk #2 and #3 when prompted.

If you skip this step now, you may view the documentation later in the program itself.

In all of these installations you may choose to read the release notes, which are essentially the latest update information and changes to the program.

Windows Skills You'll Need

Because **Citizen Services** runs under Windows, it is necessary for you to have certain Windows skills to be able to use it most effectively. What follows is a very brief explanation of some of the skills most useful in using your **Citizen Services**. *This does not replace your Windows manual*. If any of these is not a skill you're comfortable with, you'll want to refer to your Windows manual for a complete explanation.

Entering information on a screen

When you are entering information into many fields on a screen, such as when adding an entry, use the Tab Key to move to the next field, and Shift+Tab to move to the previous field. **DO NOT** use the Enter Key. The Enter Key is the same as clicking on OK, and means you've completed your entries and are ready to move on to something else.

Control

If you don't have a good understanding of this concept, you'll spend way too much time trying to get the program to do what you want it to. When you first see a screen the cursor is flashing in one of the fields. That means that if you press a letter (or number) on your keyboard it will appear in this field. However, if you click within the entry information portion of the screen, the control moves there. Then, when you press a letter, the program takes you to the first occurrence of that letter in the list.
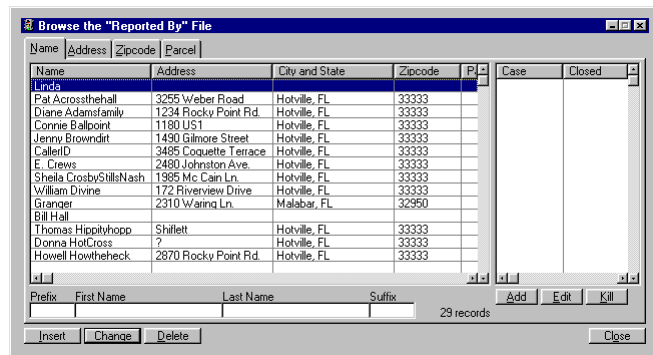
You can tell where the control is on a particular screen by looking for the flashing cursor in a field, an outlined word on a button, or an outlined record in a list.

To move to a screen tab, simply click on it. That screen will be brought to the front. Moving between screen tabs is especially important when entering new

Mouse vs. Keyboard

Throughout the manual, the mouse commands are given for procedures (e.g. "Click on OK"). If you prefer to use keyboard commands, you'll want to pay attention to the underlined letters in options throughout the program.

For example, to pull down the **File** menu, you may click on **File**, or you may press Alt+F. Then, when the menu is pulled down, you may click on your choice, or press the letter that is underlined in your choice. Any time there is some information that could be looked up (on a calendar or in the business codes, for example), you'll click on your right Mouse Button to see it. But you can also press F3.

Using the scroll bars
Scroll bars are found at the right edge and bottom edge of the screen when the information for the screen won't all fit on at once. You may click on the up and down arrow keys to move incrementally through the display, or drag the box up or down to move more quickly.

Moving a window
There are times when you may need to move a window to another location on your desktop. To do this, click on the title bar of the window and drag it to the new location. Then release the mouse button.

Resizing a window
Occasionally, you may want to resize a window so you can see more of its contents. To do this, click on the window. Then, point to a corner or border of the window (the cursor will become a double-headed arrow). Drag the mouse until the window is the desired size and then release.
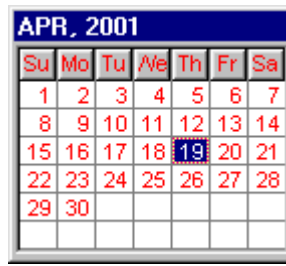
Window Setup
Go to **File, Activity** or any other main screen. Then go over to **Windows** from the main list and open that at the same time. This allows you to customize your viewing capabilities.
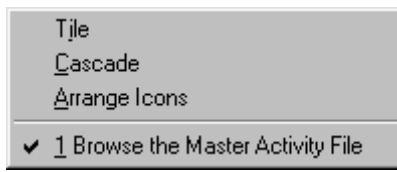
```
Tile
Cascade
Arrange Icons
─────────────────────────────────
✓ 1 Browse the Master Activity File
```

Quick Tip Keys:

F1 brings up a **Help** menu for quick and easy explanation of terms. If you are in a date field, press. F3 which is invaluable in IMS programs will bring up a calendar in a date field or pop up list in many other fields. Always try it if you need to select from a list to see if it is available this way. Press the Escape Key to release it. Right clicking on the Mouse Button will also display selections if available.

APR, 2001

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

Using the Clipboard

Go to **Edit**. This menu contains the standard Windows editing functions using the clipboard. It is active only when another document window is open.

Cut (^X)

Move the currently highlighted text to the Windows Clipboard.

Copy (^C)

Copy the currently highlighted text to the Windows Clipboard.

Paste (^V)

Copy the contents of the Windows Clipboard to the field where the cursor is currently located.

Reference Help/Contents

Your program has assistance under **Help** (press F1 at any time to take you to this section) ,**Contents** or **Index**. **Contents** has a better overview of the entire section. It is filled with explanations of almost every function and key in the program.

You may want to familiarize yourself with some of the different items in there before beginning. This makes using the program much simpler.

Windows has its own section for assistance with questions about Windows topics - **How to Use Help** which is found within the program. Use it by looking through the Contents, the Index alphabetically, or by using the **Search for Help On…**capability to find the topic or keyword you need help with.
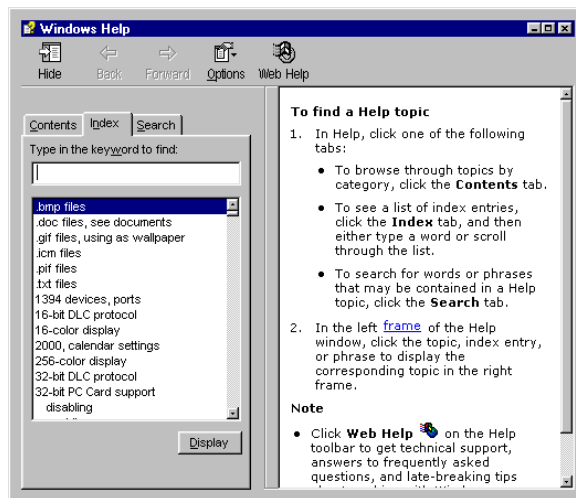
User's Manual

Go to **Help, View User Manual**. The manual is set up so that each main category is to the left side, each function of the program to the right is **Bolded and Underlined.**   Fields of information and the path (i.e. **File, Setup**) are typically **bolded** so that you may recognize them easily.

The explanation/steps are directly below it. The manual attempts to follow the natural progression of steps the user would normally take when running the program. If in doubt always look to the Index for the topic or the hyperlink (blue underlined items jump from one point of the document to another) from the page number of the item you seek. Use your Go Back Button to return to the place you were last.

First Steps

Setup your configuration of the system and establish the security of your system. After this has been done you are ready to start using your **Citizen Services** program.

Getting Organized

Configuration

Go to **Setup, Configuration**. On the General Tab fill in the **Mailing Address** of the community using the **Citizen Services** program. Continue on to the Settings Tab.

On the Settings Tab check the **Use Name Prefix** and/or **Suffix Fields** if you want them to be displayed. Select from a Two or Four Digit Year under **Case Number Format**.

This scheme allows optional segments in the case number without the confusion of blanks in the displayed number because of unused segments.

Case Number Details

The case number is stored in a format that is never displayed in windows or reports. The storage format is optimized for efficiency while the display format is optimized for clarity and flexibility. For example, the dashes used as separators between the year and other segments of the number are not stored. They are simply added when the number is displayed or printed.

A module supports case number prefix codes for zones and originators. This is an extra cost module that requires a license to activate. The format of case numbers was expanded to support up to 14 characters internally and 17 characters displayed. (The actual case number format stored in files occupies 14 characters because separators are not stored. The optional separators are displayed, adding three characters.) The option of using either two or four digits for the year prefix is retained.

The case number format was expanded from its original 10 character format of YYYY-NNNNN or YY-NNNNNNN. The new format, depending on options, is YYYY-ZZ-OOO-NNNNN where YYYY is the year, ZZ is the zone, OOO is the originator, and NNNNN is the serial number. Both the zone and originator prefixes are alphanumeric, may be individually enabled or disabled. If both are disabled (which is the case if the module is not activated) the system reverts to its old format. The use of a separator between segments of the case number is also optional. If a separator is not used each segment must be fully entered including leading zeros and trailing spaces.

The purpose of the zone is to segregate cases and receipts according to zones. A zone may be any arbitrary unit, usually a branch office, area, division, region or location. Each workstation may be assigned to a particular zone. See **Setup, Configuration, Settings, Default Zone.** If a default zone is present, all cases created at the workstation will be automatically numbered with that zone. When viewing activity using **File, Activity** only the cases for the default zone are shown. If a case is added at a workstation that is not assigned to a zone (default zone is blank) the user will be asked for the zone when adding a case. Also, cases for all zones will be displayed when viewing on a workstation with a blank default zone.

The originator prefix is similar the zone prefix in many ways, but is for a different purpose. The originator prefix is a three character code, usually the initials of the code enforcement officer that originated the case. Its main purpose is to allow creating unique case numbers in the field that will not duplicate numbers created by other field officers.

Each workstation (or portable computer) may be assigned a default originator code. A field was added to the employee file for this code, although it will usually be the same as the abbreviation. Cases created will automatically include the originator code in the case number (and the zone code, if enabled). When viewing cases using **File, Activity** only cases for the default originator will be shown.

If the default originator is left blank, all cases will be shown, and the user will be asked for the originator code when a case is added. The dialog for specifying the originator includes a hot key lookup into the employee file for selecting the originator. When a case is added it will be assigned to the originator automatically, although it can be overridden. Case numbers are assigned such that they will always be unique, although the serial number portion may repeat.

The case number format may be changed at any time, within the bounds allowed according to the optional modules activated. For example, if the originator prefix is not needed it can be disabled, and will not display in case numbers. Whenever the case number format is changed the file must be reformatted using **Utility, Reformat Case Numbers**. When case numbers are reformatted after a prefix has been added (either zone or originator), the default value is used if the case had no previous value for the prefix.

Be aware that reformatting case numbers may cause the serial number to be changed. In situations where a prefix was used and the format is subsequently changed to not use a prefix, the serial portion of two cases might be the same. That is, the two numbers were unique.

when the prefix was part of the number but are no longer unique with it removed. When this occurs the renumber utility will increment the serial portion until the overall case number is unique again. This has no effect on the relationship of the activity file with the action and other related files because an internal number is used to link files.

Locating a case by case number is generally intuitive, supporting partial entry of enough characters to make the entry non-ambiguous. If separators are used, the leading zeros are not needed to locate a case by case number. If the zone and originator prefixes are disabled, a case may be located by entering the year, separator and serial number without the leading zeros. For example, case 2001-00097 may be found by entering 2001-97 (or 01-97 if configured for a two digit year).

If the year of the case is the same as the current year the year need not be entered. In the previous example entering 97 will locate the case if the current year is 2001. If zone and originator codes are enabled, it is only necessary to enter the prefixes that differ from the default for the workstation

For example, if a case is numbered 01-LP-BOB-00175, and the default zone is LP and the default originator is BOB, it may be located by entering 175. If in the above example there was no default originator, it could be located by entering 01-BOB-175. If instead the default originator was BOB and there was no default zone, it could be located by entering 01-LP-175.

The case number options described above are part of a configurable option. They are enabled only for users licensed for this option. When disabled the case number system functions as in previous releases. The case number then consists of a year prefix in two or four digit format followed by a serial number.

Flag these items if appropriate:

Generate Receipt Numbers
This is a Portable Computer
**Allow Multiple Violations**
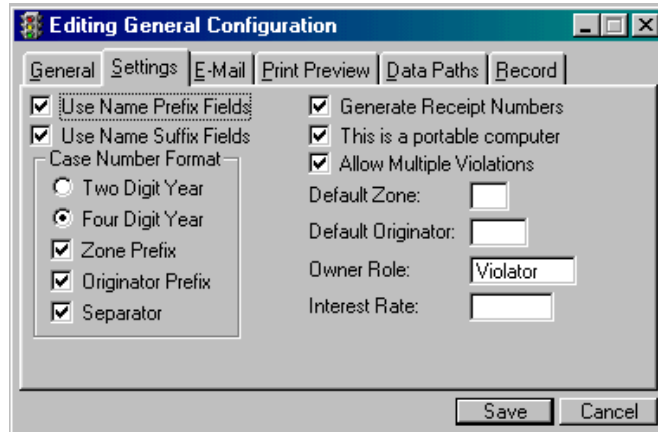
Default Originator
Press F3 for a pop up list of Employees.

Owner Role defines the role abbreviation that represents the property owner, which is usually the violator in an activity. When data is converted it will be set to "*Violator*" to support the old hard coded field titles. The purpose of this field is to support the "Activity Location" control at **File, Activity**, Change Button, General Tab. When the "Same as owner's address" button is pressed the owner location is copied into the activity location (on the General Tab, bottom half of window). Because all roles are now user defined the "**Owner Role**" value is used to identify which role represents the owner.

Interest Rate
This is the interest rate on fines.

On the E-Mail Tab users may send an e-mail message to the employee to which a new case is assigned. This is an extra cost option which must be purchased separately.
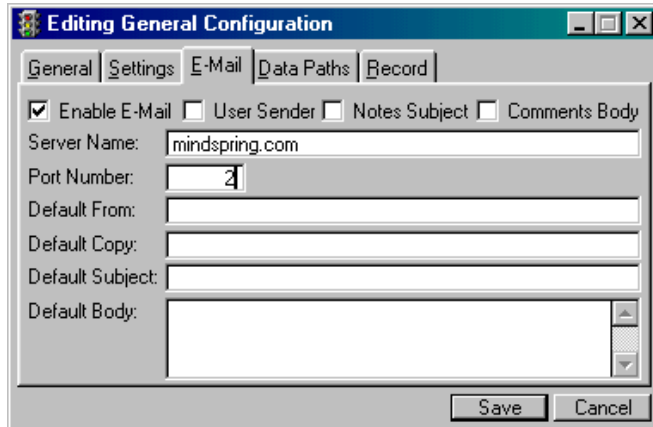
To set up the e-mail capability, first go to **Setup, Configuration**. If the e-mail option is installed a tab labeled E-Mail will appear. At the top of the window are four check boxes. The first, **Enable E-Mail** must be checked before anything else may be set up. If at any time you want to disable the e-mail function, uncheck this box.

The **User Sender** box controls whether the sender's e-mail address is that of the user adding the case or a system-wide default address. If it is checked the address of the employee linked to the logged in user will be used. If it is not checked the address below labeled **Default From** will be used.

If **Notes Subject** is checked, the notes field of the activity will be used as the subject in the e-mail. If it is unchecked the contents of the field below labeled **Default Subject** will be used. If **Comments Body** is checked the message text will be the contents of the comments field of the activity. If it is not checked the contents of the **Default Body** field will be used as the message text. The **Default Copy** field is for an e-mail address that will receive a copy of all messages sent.

The **Server Name** field is the outgoing mail (SMTP) server. This must be filled in. If you are using Outlook Express you can find it by going to Tools, Accounts, Mail Tab, Properties, Servers Tab, Outgoing Mail (SMTP).

The format of the server name field may be either the name ("mail.somewhere.com") or the equivalent IP address ("123.210.42.104"). The **Port Number** field also must be filled in. The value is usually 25. You can also find this in Outlook Express by going to Tools, Accounts, Mail Tab, Properties, Advanced Tab, Server Port Numbers, Outgoing Mail (SMTP).

The next part of setting up for e-mail is adding e-mail addresses for all employees. Go to **Setup, List Maintenance, Employee List.** For each employee, press the Change Button and enter that employee's e-mail address. After this is done the final setup step is associating each user with an employee. (This is necessary so the address of the logged in user may be found.) Go to **Setup, Security, Users**. For each user, press the Change Button and click in the **Employee** field. Enter the abbreviation of the employee to be associated with this user. Better yet, press the hot key and select from the list of employees.

Once the above steps are completed you are ready to start sending e-mail. An e-mail may be sent when any of the following happens:

- A new activity (case) is added.
- The assigned employee on an existing case is changed.
- The initial action for a case is assigned to a different employee than the case itself.
- The assigned employee for an existing action is changed.
- A new action is added to a case with an assigned employee different from the previous action for the case.

After all of the required information is filled in, press the Save Button. At this point a new tab labeled E-Mail will appear, showing all of the available message fields filled in based on your configuration settings. While the e-mail box is displayed you may enter or change any of the fields in the message before sending it.

Before a message can be sent, certain fields must be filled in. The required ones are the server name, port number, from, to, subject and message. When the E-Mail Tab is displayed you may press the Send Button to send it.

If any of the required fields are not filled in the cursor will go to the required field and the message will not be sent. If the message is sent a message box will appear shortly advising that the message was sent. You can then press the Save Button again to save the activity or action. If an e-mail was successfully sent, the date it was sent will be saved in the activity or action record. (The date will not show until after the activity or action has been saved.) Sending the e-mail is optional. You can press the Save Button again instead of the Send Button and the activity or action will be saved without sending a message.

When the e-mail screen is first shown the fields will be filled in according to your configuration settings. For example, if the case has not been assigned to an employee (the **Employee** field is blank) there will be nothing in the **To** field and the message cannot be sent. If the **Subject** field is blank, either because configured to use a blank default subject or configured to use the notes field which is blank, a subject will be created as "Case XXXXXXXX Opened MM/DD/YYYY where XXXXXXXX is the case number. If the **Message** field is similarly blank a message will be created in the format:
Description: XXXXXXXXX
Department: XXXXXXXXX
District: XXXXXXXX
Action: XXXXXXXX
(The Action line will appear only if an action is being added or changed.) You may edit the e-mail screen before sending. For example, you may send it to multiple recipients by listing their address on the To line separated by commas. You may also include an attachment by clicking on the ellipsis button (...) and selecting the file.

On the Data Paths Tab type in the location of the **Property File**. **Building Permits Manager** is where you would probably want to transfer import information from so that you can cross check code/permit violations.   If there is no path the lookup to the property file will be disabled. If the path is invalid an error message will be displayed when **Citizen Services** is started, informing you of the problem. The program will continue with the **Building Permits Manager** interface disabled. If the path is valid but the file is corrupt or of an invalid version a message will likewise be displayed.

Import/ Export

The import/export system is easy to operate provided it is set up correctly and you follow a few simple rules. On the host computer, after the required options are installed: If you are updating from a version earlier than 2.1, go to **Setup, List Maintenance, Employee List**.

Click on the Change Button and note that there is a new field named **Initials**. It will contain the first three characters of the **Abbreviation** field. The **Initials** field is what will be used as the originator when cases are added. You should check each employee record to be sure the initials field in each is unique. Once this is done you may want to go to **Utility, Set Originator from Employee**, and assign the originator on all existing cases from the employee assigned to the case.

Next, go to **Setup, Configuration, Settings**. In the case number format box you must have as a minimum the **Originator Prefix** box checked. The "**This is a portable computer**" box should not be checked. Click on Save and close the window. Go to **Utility, Reformat Case Numbers** and reformat all existing case numbers so the originator code (employee initials) will be part of the case number.

Go to **Setup, Configuration, Data Paths**. If the import/export module is installed you will see a field for Import/Export Path.

This is the path to which data files will be exported and from which they will be imported. This may be a path to removable media (such as a Zip disk) if the media is capable of holding the entire **Citizen Services** database. (The export function does not support splitting the data between multiple volumes.) It may also be the path to another folder which is used as the exchange folder between the permanent database and the portable one. This field must be filled in to enable import and export functions.

You may use the hot key F3, to open a file dialog for selecting the path. The path must already exist. You cannot create a folder in this dialog. Save your changes and exit from Citizen Services. Start **Citizen Services** again and go to the **Utility** menu. You should see a new submenu **Import/Export Data**, containing two items: **Export Data Files**, and **Merge Data Files**. (If you do not see them go to **Setup, Security, Security Profiles** and edit the profile you are using to allow access to these functions.)

The import/export procedures were adapted to the database changes. Changes were made to accommodate the use of portable computers as both a portable with local data and a workstation accessing the host data. Because the identity as a portable computer is stored locally by program name, the setting will remain regardless of whether using local or host data. The danger is that if the portable flag is not set after each switch of database, that the host data could be overwritten by a computer identified as portable importing while actually accessing host data. To minimize such problems, when configured as a portable computer the main menu window title text now indicates such and the initials of the inspector. As further insurance against such errors, **Citizen Services** upports renaming the executable program on the portable computer (cs.exe) to a different name (say, cs2.exe). The host program would remain as cs.exe and the portable setting when using host data would be filed under that name.

Having the local program under a different name allows automatic changing of the portable flag and prevents errors resulting from having to change it. Note that only cs.exe must be renamed to use this method. The dynamic link libraries (*.dll) must retain their original names.

It should be noted that records deleted on a portable computer will not be deleted on the host when data is merged. If, for example, a party is deleted on the portable, it will remain on the host. Likewise, violations deleted on a portable will remain on the host. They may be closed on the portable and will be closed on the host after a merge. Any parties or violations added or changed on a portable will be added to or changed on the host data after a merge.

Portable Computers

On each portable computer to be used: Install **Citizen Services** and set up security and data paths. If the import/export option is enabled, a checkbox labeled "This is a portable computer" will appear in **Setup, Configuration, Settings**. This is an important setting because it determines what functions are available and how they work. This box should never be checked on the host system and should always be checked on each portable system.

The Import/Export path in **Setup, Configuration, Data Paths** must be filled in. Remember that this path is relative to the portable computer. Generally it will be the diskette drive, although it could be on the hard drive. **Citizen Services** must have read/write access to the drive specified. You may initially copy *.cs from the base system, and then alter what is needed for the portable computer. Data paths and security settings on the portable computer will not be disturbed by the import/export processes. No harm will be done by allowing access to all functions on the portable computer, but it may be a good idea to limit access for this reason: Any additions or changes made to files other than the master, action, principal and fine files will not be imported.

The case number format settings on each portable computer must be the same as on the host system. Each portable computer must have the **Default Originator** field **in Setup, Configuration, Settings** set to a different value. If the field is left blank on a portable computer the import/export option will be disabled.

If **Citizen Services** shares the **Building Permits** property file you must install **Building Permits** on each portable computer and configure it for import/export as well.

See the **Building Permits** user manual or release notes for version 4.200 for instructions. To avoid errors it is recommended that a different path be used for the **Building Permits** export data.

It may be the same drive if it has sufficient capacity, but should be in a different folder.

If all of the above has been completed successfully you are done with the setup and will not have to do it again unless you add another portable computer or change the case number format. Of course, if you install a program update from IMS it must be installed on the host and all portables.

The import, export cycle: The presumption is that one or more field officials will start the day with a portable computer synchronized with the host, and proceed to enter or modify cases, add or update actions, including fines during the day. At the end of the day the data is exported from the portable computer, imported into the host, and merged with the host data. The merged data is then exported from the host and imported into the portable, synchronizing it for the next day.

Following are the steps to execute this cycle:

Beginning of Day:

1. From the host computer, select **Utility, Import/Export Data, Export Data Files**. This will copy all working data files (except security and configuration settings) to the specified import/export path. It will automatically overwrite any existing files. If this menu item does not appear, check security settings and make sure the "This is a portable computer" is not checked.

2. If **Citizen Services** shares the **Building Permits** property file you must export this data as well using **Utility, Import/Export Inspections, Export Data Files** on the **Building Permits** menu.

3. From the portable computer, select **Utility, Import/Export Data, Import Data Files**. This will copy all working data files (except security and configuration settings) from the specified import/export path to the working data files. It will automatically overwrite any existing files. At this point the portable computer is synchronized with the host. Repeat this for each portable computer. If this menu item does not appear, check security settings and make sure the "This is a portable computer" is checked.

End of Day:

1. From the portable computer, select **Utility, Import/Export Data, Export Data Files**. This will copy all working data files (except security and configuration settings) to the specified import/export path. It will automatically overwrite any existing files.

2. Copy all files from the import/export path on the portable computer to the specified import/export path on the host computer. If the portable computer has a network card and you have a network system, you may be able to import from the same folder that received the export. If not you may import from removable media. If the path on the portable computer was to a removeable media drive, simply remove the media from the drive in the portable computer and place it is the drive in the host computer.

3. From the host computer, select **Utility, Import/Export Data, Merge Data Files**. This will merge files in the specified import/export path with the working data files. If this menu item does not appear, check security settings and make sure the "This is a portable computer" is not checked.

If there is an error of any kind during the merge process the process will be aborted and all data files on the host will be restored to as they were before the merge was started. Repeat these three steps for each portable computer.

Other considerations:

If more than one portable computer is used, remember that the data exported from each portable must be merged with the host data before exporting from the next portable. The obvious reason is that the host has a single import/export path and the files from the next computer would overwrite those of the previous portable. However, the sequence is not important as long as the data from each portable is merged before going to the next portable. It is very important that all **Beginning of Day** steps be performed on each portable computer from which an export was made the previous day.

The reason is that the merge process may change some internal numbers to maintain file integrity, causing a discrepancy between the host and portable computer. If the portable is not synchronized by executing beginning of day steps, the merge process may fail the next time because of changes made in the previous merge. If no export was made from a portable it is not necessary to perform the **Beginning of Day** steps, although it is a good idea so it will have the latest information.

Note that the **Building Permits** data was not exported from the portable in the **End of Day** procedure because of the presumption that it is used only to look up property information, and would not be a code enforcement concern. If the same official is performing building inspections as well as code enforcement functions the import/export functions as documented in the **Building Permits** User Manual and release notes for version 4.200.

Remote Location

You may run **Citizen Services** with data files at a remote location. **Citizen Services** data files (*.CS) do not need to be located in the same folder as the program files.

The value is stored locally and may be different for each workstation, as long as the physical location is the same for all workstations that are to share the database. This field may be changed only by users with *Supervisor* access. If this is left blank, **Citizen Services** will function as before. As of version 2.056 the initial value will be null, so program operation will be unaffected. If a value is placed in the field, the programs may be loaded on the local workstation and the data files on a server at the location specified.

Note: A change will take effect the next time **Citizen Services** is started. It should not be changed while other workstations are running **Citizen Services** for obvious reasons. System administrators may want to experiment with the remote vs. local program setup, because one method may not necessarily work better than the other. It depends on factors such as the relative speed of the local workstation and the server and the speed of the link. Another consideration is the fact that each workstation must have a copy of the program executable files (*.exe, *.dll), which complicates administering program updates, particularly when the database structure is changed.
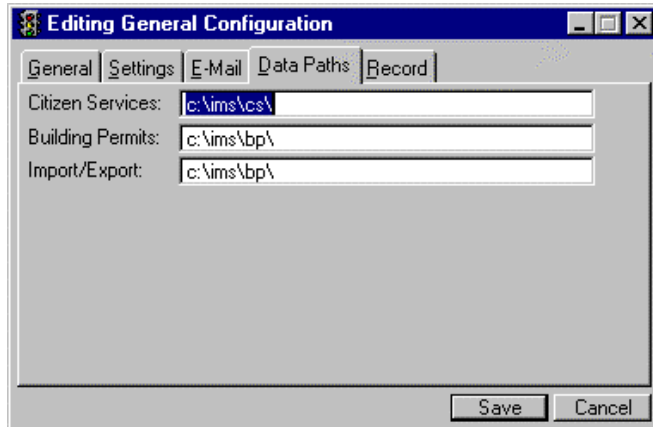
The Record Tab is simply that - a record of entries made to the system. Make sure that you press the Save Button if you are all finished with the configuration.

Security

After selecting your configuration and system data you can use any function of **Citizen Services** if you log in under a user name and give yourself and others a security profile. The number of different user names is unlimited. Each user name has its own password and access level, which determines what functions are available to the user. When version 2.100 is installed the old users and their passwords will preserved. All security profiles should be reviewed after each release is installed because of system setup changes.

It is a good idea to have an alternate who can add information into the system in case of emergency. Passwords should be in a secure location held only by a supervisor or alternate.

Security Profiles

Go to **Setup, Security, Security Profiles.** The **Building Permits Manager** has features built-in to provide security for your records. This security is in the form of six levels of password protection. This system features individual procedure level access for an unlimited number of users. Each user may be assigned to any one of an unlimited number of security profiles. Security on entire menus may be set as well. Setting a menu automatically sets the access to all subordinate items and menus to the same access level. You can also set items under a menu to a higher or lower access level than their parent menu. The only exception is if you set access to a menu to *No Access*.

This disables all items on that menu that are sensitive, including any sub-menus if any, regardless of their individual access levels. If you do not set up your security profiles, it will default to *No Access*.

Each of these profiles will initially have the same access to all menu items, effectively making it work exactly as in previous releases. You then may rename and edit each profile to suit your needs. Changes to security take effect the next time **Citizen Services** is started. Note that when new users first log in they will have no access. They must exit the program and start it again for the conversion of their old security access to take effect.

This will be the case also when existing users are converted from prior versions of **Citizen Services**. Note also that new security profiles initially provide full access to all functions. Be sure to edit the profile before assigning it to any user. Keep in mind that some procedures appear on more than one menu and setting access in one menu has no effect on the same procedure on another menu.

*It's a good idea to make sure at least the person responsible for **Citizen services** and the department manager know the Supervisor password, in case someone is out of the office.*
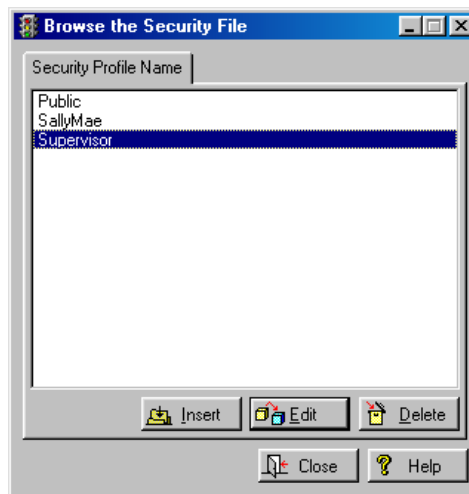

If you do not set up your security profiles, it will default to *No Access*. Once you set your access you then may rename and edit each profile to suit your needs. Changes to security take effect the next time

Citizen Services is started. Note that when new users first log in they will have no access. They must exit the program and start it again for the conversion of their old security access to take effect. This will be the case also when existing users are converted from prior versions of **Citizen Services**.   Your selections for access are:

Note: After installation the program will grant complete access without

The *No Access* allows no access at all to the user. The *View Only* level allows persons access to license information, but does not allow it to be changed. It also prevents confidential information from being viewed

asking for a user name or password, until at least one user is added. This should be done first thing.. You should disable access to the Security functions for all security profiles but one, which should be set to the highest level (Supervisor).

by the user when *Data Entry* permits access to data only. The *Update* level allows users to change individual licenses, but does not allow changes to be made affecting many licenses (for example, computing fees or penalties). The *System Update* level permits access to all functions except security and is required to delete an activity. The *Supervisor* level password is the highest security level, permitting access to everything.

A **Security Profile** of *Supervisor* must be set up first, then you may add additional profiles with different access levels, otherwise you will have access denied to other profiles. Once you have set up your **Security Profile**, you can begin adding **Users** for the program.

To enter new information press the Insert Button. You can edit it once you have it created. Give your profile a name and then press the OK Button. You can go into it now and edit.

To edit an existing security profile, press the Edit Button. You may use the Change All Button to change all access levels to the same type. Press the Apply Button and then OK.

To change the user access information individually, by item press the Edit Button.

Users

To enter access information for each user, go to **Setup, Security, Users.** Select the Insert Button and enter the **Name** of the user, **Password**, and a **Security Profile** for that user. In the **Security** field you can use the F3 Hot Key to access the profiles and select which profile you want to assign a particular user. Click OK.

If you fail to provide Supervisor access to the security functions for at least one security profile you will be unable to make any additions or changes
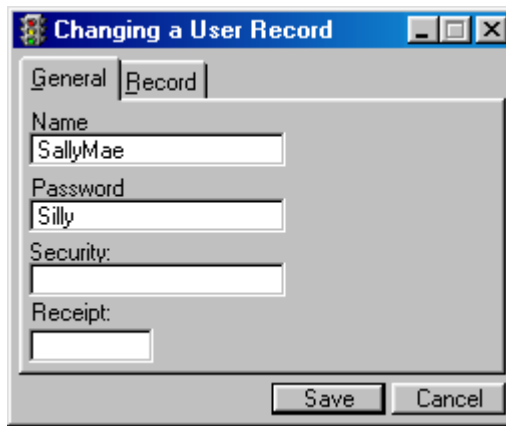
Once this information is in the system it will ask you to login the next time you access the program.
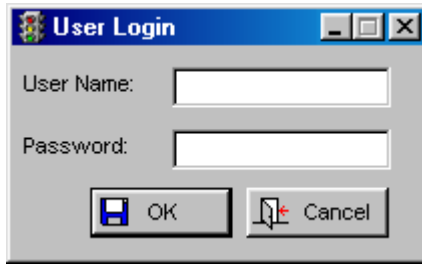
Print Security Profile List

Go to Setup, Security, Print Security Profile List. This report lists all security profiles and the access for each menu item. This report requires *Supervisor* access to print.

List Maintenance

This is where you will be able to store your information in the form of lists which can be very helpful for making reports and recordkeeping.   The information from the Review Button appears light gray showing that you may view this information only. You may edit individual case information under **File, Activity**, Change Button.

On any of these lists the Review Button lets you review the information that is related to the description, department, district, employee, action type, or form letter. It is taking you to **File, Activity,** Change Button, General Tab. The information is gray here because you cannot edit it here. To do that go directly to **File, Activity**.

Description List

Go to **Setup, List Maintenance, Description List**. The lists are separated according to the **Abbreviation** and the **Name** (brief description) of the list. In the far right hand column you will see the actual cases and the date they were closed under each specific list name. If you highlight the list on the left hand side then you can highlight the individual case on the right side and press the Review Button to review the information. You cannot change the individual case details here. You must go to **File, Activity**, Change Button.

You may edit the **Name** and **Abbreviation** by highlighting the entry and pressing the Change or Delete Button. To add a new description list name press the Insert Button.
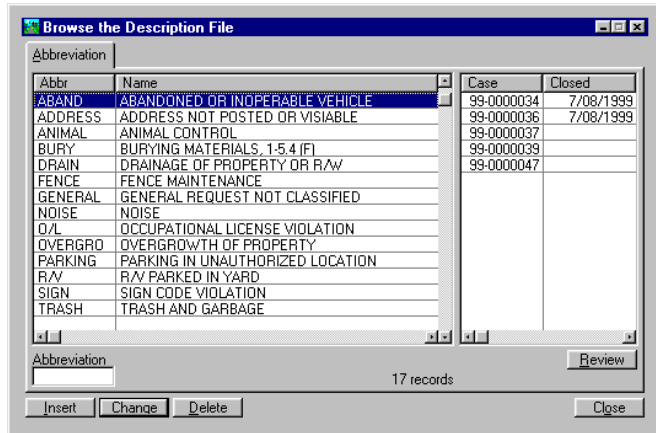
Enter a new **Abbreviation** and **Full Name. Description** is intended for lengthy (up to 5000 characters) text describing the nature of the situation, such as a relevant ordinance. This text may be selected for reports and form letters.
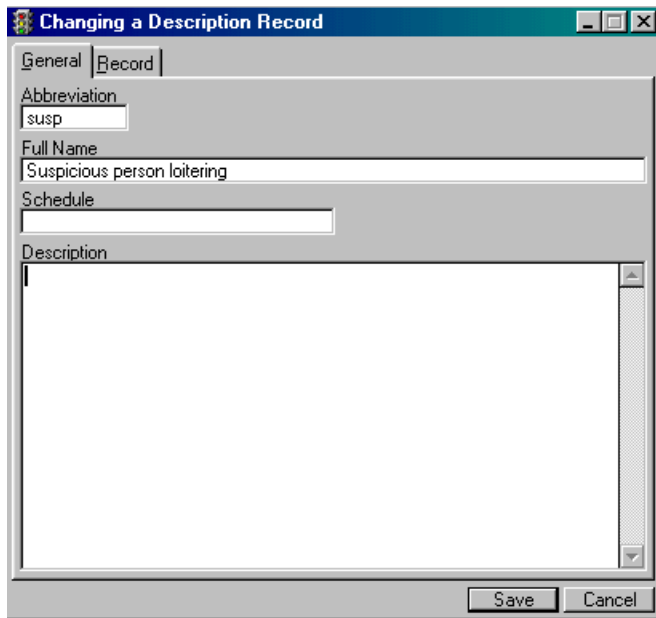
Print

Go to **Setup, Lists, Print**. You have the option to o print a hard copy list of standard type names (Description, Department, District, Employee, Action Type, Form Letters, Fine Types).

<u>D</u>escription List
<u>D</u>epartment List
<u>D</u>istrict List
<u>E</u>mployee List
<u>A</u>ction Type List
<u>F</u>orm Letter List
<u>F</u>ine Type List

Department Lists

Go to **Setup, List Maintenance, Department List**. To enter a new department press the Insert Button. To edit existing departments highlight the entry and press the Change or Delete Button.   You may review each case individually but must change it at **File, Activity**, Change Button.

Abbr	Name	Case	Closed
AD	ADMINISTRATION	99-0000011	4/22/1999
BL	BUILDING & ZONING	99-0000024	5/20/1999
CE	CODE ENFORCEMENT	99-0000052	
FD	FIRE DEPARTMENT		
FM	FIRE MARSHAL		
OL	OCCUPATIONAL LICENSING		
PW	PUBLIC WORKS		

Browse the Department File

Abbreviation

7 records

Insert Change Delete   Close
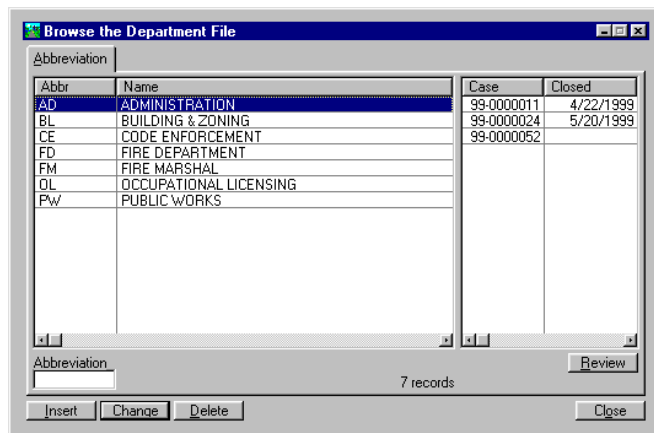
Review

District List

Go to **Setup, List Maintenance, District List**. This is a list of all council persons in the district of the entity using **Citizen Services**. You may review individual cases that fall under the district of these individuals.

To change actual case information go to **File, Activity**, Change Button. To insert a new council person press the Insert Button. To edit an existing one highlight the entry and press the Change or Delete Button.
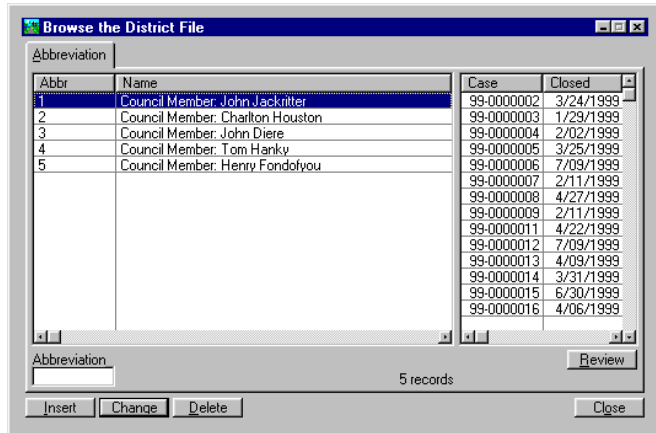
On the General Tab enter the **Abbreviation** (number you assign or abbreviation - initials) and the **Full Name** of the council member.   Press the Save Button. The Record Tab is for system information only.
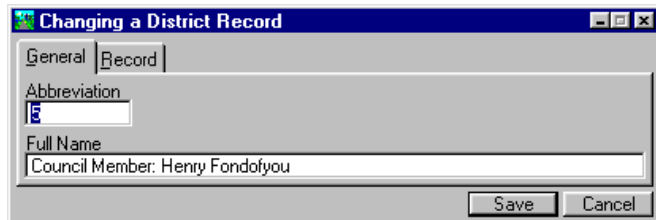
Employee List
Go to **Setup, List Maintenance, Employee List**. To add a new employee press the Insert Button. You may review individual cases that a specific employee handled. To change the case information go to **File, Activity**, Change Button.

To edit existing employees, highlight the entry and press the Change or Delete Button.
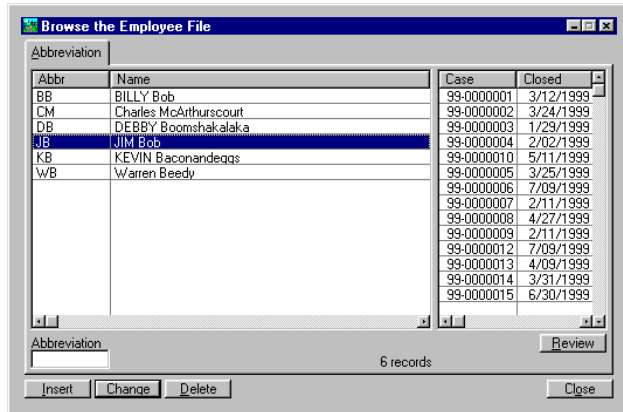
On the General Tab enter the **Abbreviation** and the
Full Name of the employee. Press the Save Button.
The **Initials** field will contain the first three characters
of the **Abbreviation** field. The **Initials** field is what
will be used as the originator when cases are added.
You should check each employee record to be sure the
initials field in each is unique. See also
Import/Export System.

Action Type List
Go to **Setup, List Maintenance, Action Type List**.
To enter new action types press the Insert Button.

You may review individual cases that are of this action
type, but to edit case information you need to go to
File, Activity, Change Button.

Browse the Action Type File

Abbreviation

Abbr	Name	Case	Number	Completed
1INV	INVESTIGATE ALLEGATIONS	99-0000045	1	
1ST CONT	CONTACT IN PERSON (visit/phone)	99-0000047	1	7/02/1999
1ST INSP	FIRST INSPECTION	99-0000048	1	8/26/1999
1ST LTR	FIRST LETTER	99-0000049	1	8/20/1999
2ND INSP	SECOND INSPECTION	99-0000050	1	8/27/1999
3RD INSP	THIRD INSPECTION	99-0000054	1	10/04/1999
CITAT	CITATION TO COURT	99-0000056	1	
CLOSE	CLOSE ACTIONS	99-0000059	1	1/04/2000
CLTR	CERTIFIED LETTER	99-0000058	1	11/30/1999
FOLLOW	FOLLOW UP OF OPEN CASE	99-0000062	1	12/07/1999
OTHER	ACTION BY OTHER AGENCY	00-0000001	1	1/03/2000
PHONE	PHONE CALL	00-0000002	1	2/01/2000
STOP	STOP WORK POSTED	00-0000003	1	1/26/2000
		00-0000004	1	2/07/2000

Abbreviation

13 records

Review

Insert   Change   Delete   Close

Changing an Action Record

General | Record

Tracking: 1   Initiated 2/01/2002   Scheduled 2/01/2002   Completed 2/01/2002

Action Type: ARREST   Arrested person for infraction of the law

Assigned to: EE   Elisabeth Eaker

Notes: Arrested on disturbing the peace charge

Work Printed

Comments: Arrested, charged with disturbing the peace. Fined appropriately. Paid fine within 1 day.

Reschedule   Fine   Spell   Save   Cancel

To edit existing action types highlight the entry and press the Change or Delete Button. On the General Tab enter the **Abbreviation** and the **Full Name** of the action type.   Enter the new activity to be used when actions are rescheduled and the form letter to be sent as part of this action. You may remove the **Letter** or **Notification Form** information at a later date if you so choose.   If there are none then leave the space blank. Press the Save Button.

Form Letter List

Go to **Setup, File Maintenance, Form Letter List**.
To enter new form letters press the Insert Button.
Form letters may be printed in batch by letter type.
Letters may be printed for a single type or a range of
types. Letters will print for all actions that are coded
with a letter and has an empty letter printed field.
Letters will not be printed for closed cases even if the
letter was never printed. This procedure is located on
the main menu at **Reports, Specialty Reports, Form
Letters.**

You may view the cases that included one of these
form letters in its files. To change case information go
to **File, Activity**, Change Button.
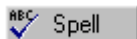
Spell checking is available for form letters if users have
Microsoft Word installed on their computer. If a Spell
Button appears on the window it means Word is
present. If the button does not appear, either Word is
not present or is an incompatible version.

To edit an existing form letter style highlight the list on the left window and press the Change or Delete Button. Enter the **Abbreviation** and **Full Name** and type in the new symbols and text.   See Form Letters below for details on how to insert the symbols or Form Letter Lists above.   The F3 Key will do this as well. There are approximately 35 different codes that you can insert into your letter. Some, like the five listed below, are in the action record. The fields are: action start date, action schedule date, action close date, action notes and action comments. The action record that will be used for a letter is the one selected when the letter is printed.
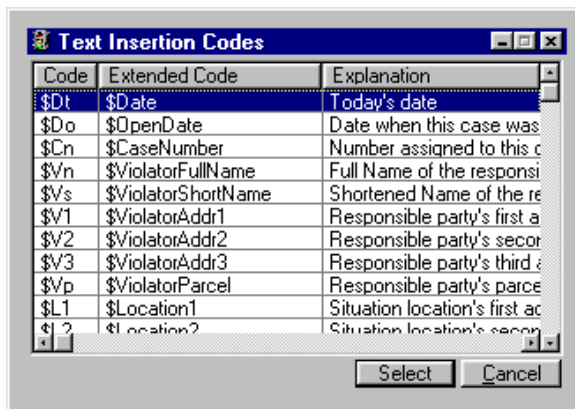
The maximum size of form letters and the number of data fields that may be merged is about 40 plus ten for each defined role and nine for each violation. The fields available for form letters are essentially the same as those available for reports, although the names may vary. The fields beginning with $Violation are special fields that will not be available if the multiple violations option is disabled. Each of these will print the specified value for each violation on a case. The primary violation will print first, and subsequent violations will start on the next line. These fields should always be placed on the left margin of the letter, because each subsequent violation will start at the left of the next line.

As with the standard reports, three of the violation fields ($ViolationFullDesc, $ViolationAbbrDesc and $ViolationText) duplicate those for the primary violation ($FullSituationDesc, $AbbrSituationDesc and $SituationText respectively). The form letters are stored in the data file, "letter.cs". The number of different letters available is essentially unlimited. You may add new letters or edit old ones. All of the contents of a letter are defined by you, the user and enhanced by a system of variables which allow each letter to be personalized by a symbol, consisting of a dollar sign followed by a two character code. The F3 Key provides a pop up list of the insertion codes you will need to create a form letter. Highlight the one you want and press the Select Button. It automatically inserts it into your letter.

It is highly recommended that all form letters be reviewed and any codes not printing correctly be replaced with the corresponding new code. A suggested method of becoming familiar with the new codes is to create a form letter that has every available code, each on a separate line preceded by the code text without the dollar sign. Create a dummy master activity record with generic values in all fields. (The value in each field should describe the field, such as "In care of".) Add a special action type that uses the test letter, then add this action to the dummy activity. By printing the letter you will have a reference sheet that shows each code and what it prints. The codes as of this release follow.

Text Insertion Codes

Code	Extended Code	Explanation
$Dt	$Date	Today's date
$Do	$OpenDate	Date when this case was
$Cn	$CaseNumber	Number assigned to this c
$Vn	$ViolatorFullName	Full Name of the responsi
$Vs	$ViolatorShortName	Shortened Name of the re
$V1	$ViolatorAddr1	Responsible party's first a
$V2	$ViolatorAddr2	Responsible party's secor
$V3	$ViolatorAddr3	Responsible party's third a
$Vp	$ViolatorParcel	Responsible party's parce
$L1	$Location1	Situation location's first ac
$L2	$Location2	Situation location's secor

$DateToday	Today's date
$OpenDate	Date when this case was first opened
$OpenTime	Time when this case was first opened
$CaseNumber	Number assigned to this case
$Location1	Situation locations first address line
$Location2	Situation locations second address line
$Location3	Situation locations third address line
$LocationParcel	Situation locations parcel number
$FullSituationDesc	Situation description (full)
$AbbrSituationDesc	Situation description (abbreviated)
$SituationText	Situation class description text
$ClosedDate	Date when this case was closed
$ClosedTime	Time when this case was closed
$ActivityNotes	Notes field in activity record
$DeptAbbr	Department Abbreviation
$DeptName	Department Full Name
$DistrictAbbr	District Abbreviation
$DistrictName	District Full Name
$EmployeeAbbr	Employee Abbreviation
$EmployeeName	Employee Name
$ActivitySource	Activity Source
$ActivityComments	Activity Comments
$ActionStartDate	Date Action Started
$ActionScheduleDate	Date Action Scheduled
$ActionScheduleTime	Time Action Scheduled
$ActionCloseDate	Date Action Closed
$ActionNotes	Action Notes
$ActionComments	Action Comments
$ActionTracking	Action Tracking Number
$ActionWorksheet	Date Action Worksheet Printed
$ActionFormLetter	Date Action Form Letter Printed
$ActionTypeFull	Action Type Full Name
$ActionTypeAbbr	Action Type Abbreviation
$ActionEmployeeAbbr	Action Employee Abbreviation
$ActionEmployeeFull	Action Employee Full Name
$FineType	Fine Type
$FineAssessed	Amount of Fine Assessed
$DateAssessed	Date Fine Assessed
$FineSettled	Amount of Settled Fine
$DateSettled	Date Fine Settled
$ActionTimeSpent	Hours Spent on Action
$ViolationOpenDate	Date when this violation was first opened
$ViolationOpenTime	Time when this violation was first opened
$ViolationFullDesc	Violation description (full)
$ViolationAbbrDesc	Violation description (abbreviated)
$ViolationText	Violation class description text
$ViolationClosedDate	Date when this violation was closed
$ViolationClosedTime	Time when this violation was closed
$ViolationNotes	Notes field in violation record
$ViolationComments	Violation Comments

$(Role)+FullName	Full Name of the party (Example: Mr. John Smith Jr.)
$(Role)+ShortName	Shortened Name of the party (Example: Mr. Smith)
$(Role)+Addr1	Party's first address line (excluding name)
$(Role)+Addr2	Party's second address line (excluding name)
$(Role)+Addr3	Party's third address line (excluding name)
$(Role)+InCareOf	Party's address description (in care of)
$(Role)+Zipcode	Party's zip code
$(Role)+Parcel	Party's parcel number
$(Role)+Notes	Party's notes (from principal)
$(Role)+Comments	Comments for this party (unique to activity)

Form letters may be more than one page long. The number of characters in the letter is limited to 4096 characters, which can extend to two or three pages depending on the amount of white space in the letter.

Receipt Types
Go to **Setup, List Maintenance, Receipt Types**. After receipt types have been set up, each user that will be receipting must be assigned to a receipt type using **Setup, Security, Users**. If the receipt field is left blank a user may still enter receipts, but the buttons to validate and endorse will not be present.

Fine Types
Go to **Setup, List Maintenance, Fine Types**. This section is for levying and collecting fines for code violations. A fine type file defines the types of fines and includes such things as the amount of the fine, whether a flat or per day amount, and the general ledger account numbers for transferring the fine revenue and receipts. Any action type may have a fine attached by specifying a fine type. When adding an action that includes a fine, a fine record will be added as well.

Each fine type must have a fund, cash account and revenue account specified if it is to be transferred to **General Ledger**. The **Amount** field is the base fine amount, which can be the flat amount or an amount per day if the **Daily** box is checked.

When a fine is added the amount will default to that of the fine type selected, but may be changed. Each fine type may have its own general ledger accounts numbers.

You have the ability to charge interest on fines. The annual interest rate is set in **Setup, Configuration, Settings**, Interest Rate. Interest is computed as simple interest (not compounded). A checkbox was added to the fine type update window (**Setup, Lists, File Maintenance,** Fine Types, Change Button, Interest) which determines whether or not interest is charged on fines of that type. When a fine is added, a checkbox is also available to override the default interest setting of the fine type. When the fine is a daily fine (dollar amount each day), interest is calculated individually for each day. Whenever the interest checkbox on a fine is checked or unchecked the fine will be recomputed to reflect the current interest setting.

You may specify whether or not revenue and or cash is combined by fine type when transferred to **General Ledger** or whether each file is transferred individually.

Fine   When viewing a case with a fine action, a fine button will allow viewing details of the fine. The fine record contains three dollar amounts: The first is the base amount of the fine. It may be a one time flat amount or an amount per day. The assessed amount is the current amount of the fine. If it is a flat fine it will be the base fine amount. If it is a daily fine it will be the total amount accrued to date.

The **settled amount** is the actual amount of the fine paid. No revenue will be transferred to general ledger until the settled amount has been entered and a receipt for this amount entered. Once a fine has been transferred it cannot be edited.

A checkbox is displayed indicating whether or not a fine has been transferred but it cannot be edited. Daily fines will stop accruing when a settlement date is entered or the action associated with the fine is closed. The fine name, amounts and dates are available in the action report.

Reschedule   The Reschedule Button allows you to clear the completion dates and the Notes on the activity and to reschedule or introduce new dates and notes.

The next step is to set up action types associated with a fine using **Setup, List Maintenance,** Action Type List. Enter a fine type in the **Fine** field in the action record or use the hot key to select from the list of fine types. When the action is applied to a case the fine window will appear for adding the fine.

Paying Fines
The payment of fines may be receipted by simply filling in the amount in the Settled field of the fine record. An optional receipt number may be entered at that time. If the system is configured for automatic receipt number generation (**Setup, Configuration**, Settings Tab, Generate Receipt Numbers checkbox) a unique consecutive number will be generated by the system when the settled amount is entered.

Fine Will Be Changed

Case Number: 2002-LP-BOB-00001
Fine Type: 2
Fine Amount: 35.00 Per Day
Assessed Amount: 35.00
Date Assessed: 2/01/02
Settled Amount: 3,500.00
Date Settled:
Receipt Number:
☐ Transferred

OK   Cancel   Help

This number will be right justified in the 20 character receipt number field, with a range of 1 to 99,999,999,999,999,999,999. When automatic receipt number generation is enabled the generated number may not be manually changed.

When the text is printed the symbols will be replaced with the current value of the specified variable. The dollar codes may be inserted into text by simply typing them or using the hot key to select from a list.

The use of a serial validator/receipt printer with a cash drawer is also supported. To use this feature, you must set up receipt types using **Setup, List Maintenance, Receipt Types**. A receipt type specifies the com port and cash drawer number, and the codes for manipulating the printer and cash drawer.

It also specifies the text printed when validating a receipt or endorsing a check. The validation or endorsement text may contain any of five "dollar codes" representing runtime variables:

$D = Date
> **$T = Time**
> **$Y = Receipt type name**
> **$R = Receipt number**
> **$L = Amount received**

Role List
This allows the user to name the roles to be used.

Schedule List
The schedule file allows calculating the schedule date from a starting date by a number of methods. For the initial action added to an activity the starting date will be the date the activity was added. For all subsequent actions the starting date will be the date the prior action was closed. If the prior action was not closed the starting date will be the current date. The schedule options are: Fixed Days Ahead, Same Day Each Week, Same Day Each Month, Monthly Day Of Week, and Next Date In List. In addition, any number of dates may be added to a skip list for each schedule that are not available. If any scheduled date falls on one of those dates it will be advanced to the next available date.

All calculated schedule dates except those that specify a day of the week will skip over weekends (only Monday through Friday are used). The Schedule Tab (**Setup, Lists, File Maintenance**, Schedule List, Edit button, Schedule tab) is where you set up the parameters used to calculate the date. The Skip Dates tab shows the list of "blacked out" dates that will not be used. All schedules have a **Days** field which may be used for a minimum number of days to the scheduled date. For example, if the action scheduled is normally on Tuesday, an action being scheduled on Monday would be rescheduled for the next day, which might be too soon to get on an agenda or otherwise allow time for preparations. The **Days** field in effect allows specifying a minimum delay before the action is scheduled. All schedule types add the value in days to get a new starting date before the schedule date is calculated. If there is a value in the **Time** field of the schedule it will be used as the scheduled time for the action. How each schedule type functions is described below:

Fixed Days Ahead: The value, if any, in the Days field will be added to the original starting date to produce the schedule date. If the date falls on a weekend it will be advanced to the following Monday. If the date is in the skip list it will be advanced to the next weekday not in the skip list.

Same Day Each Week: This option will schedule to the next date that falls on the day specified in the Day of Week field. Since the day of the week is specified in this schedule it is not checked for whether it is on a weekend. It is, however, checked against the skip list, and will be advanced to the next occurrence of the specified day of the week if it falls on a skip day. For example, if the scheduled date is on a Tuesday and coincides with a skip date the schedule date will be advanced to the following Tuesday.

Same Day Each Month: This option handles schedules for events such as hearings that occur on a specified day of each month. An example would be the 10th of each month. If the date occurs on a weekend it will be advanced to the next occurrence of this day of the month that does not fall on a weekend. If the calculated date is in the skip date list the date will be advanced to the next occurrence of this day of the month that does not fall on a weekend and is not in the skip list. For example, if the scheduled date is the 10th of the month and the date coincides with a skip day, the schedule date will be advanced to the 10th of the following month.

Monthly Day Of Week: This option handles schedules for events that fall on a specified day of the week in a specified week of the month. An example would be the second Tuesday of the month. The calculated date is not checked for a weekend because the day of the week is specified in the schedule. It is checked for the date appearing in the date skip list. If the date is in the skip list it will be advanced to the next date that qualifies according to the schedule (day of the week and week of the month) that is not in the skip list. For example, if a schedule specifies the second Monday of each month, and the schedule date coincides with a skip date, the schedule date will be advanced to the second Monday of the following month.

Next Date In List: This schedule method relies entirely on a list of dates in a related schedule date list. The schedule date will be the first date in the list after the adjusted starting date.

Day to Day Use

Activity

Browse Master Activity File

Go to **File, Activity**. Listed in this table are all of the Master activities and their appropriate sub activities (individual replies to the same master activity incident) that the **Citizen Services** have responded to. Responses can be in the form of phone calls, visits, letters, citations, inspections and personal contact by public officials. You may sort these for viewing by the case number, date, description, district, department, employee who handled the case, location of the activity, or parcel number of the location where the activity took place. Just click on the tab you want to view by. You may also type in the information if you know it in the box in the lower left hand corner for quick access to the specific entry. The amount of records are shown at the bottom of the right hand side of this window. See this screen up close!

To view all of the open cases check the **Show Open** box. To view all closed cases check the **Show Closed** box. To add a new activity press the Insert Button. You will be taken directly to the Actions Tab.

The program will take you to the Owner/Location Tab automatically. Simply go over to the General Tab if you want to start there first. To add information to the other tabs simply click on them to bring them forward.

Spell	Spell checking is available for form letters if users have Microsoft Word installed on their computer. If a Spell Button appears on the window it means Word is present. If the button does not appear, either Word is not present or is an incompatible version.

Photo +	On each tab the Photo Button will display the photos associated with this activity if any have been taken and entered into the **Citizen Services** program. They are kept on your computer and the location is entered in here. These photos will be printed when the master activity report (**Reports, Standard Reports, Master Activity Reports**) is printed. The image file formats supported are .BMP, .PCX, .GIF, .JPG, and .WMF. To view the photo, press the View Button. The default image format is .JPG.

1279 Hotville Rd. (319x220)

Resize	To insert a new photo for this activity press the Insert Button. To edit the photo press the Change or Delete Button. Press the Resize Button to resize the photo. The aspect ratio of the original image is preserved when images are resized. Once the image has been attached you should use the View Button to view it. This is an important step because you may specify the size and aspect ratio of the image while viewing it. When viewing the image, use the mouse to drag the edges of the window.

(If you "grab" the window near a corner you can resize vertically and horizontally at the same time.) The image will resize to fit the window. The current image dimensions are shown in the window title bar.

The size you have selected here will directly affect the size of the image on the activity report. The relationship between the size of the image on the screen and on a report depends on the display resolution set for the monitor. When the horizontal size of the image (the first number in the title bar) as displayed is 750, the printed image will fill the full width of a report. Any larger width will cause the image to be truncated on the right when printed. When the monitor resolution is set to 1024 X 768, this corresponds to almost a full screen width.

When the activity report is printed, the images are printed from left to right on the page. If the photo has a caption it will be printed below the image. If there is not room for the next image to print to the right of the previous one it will be placed at the left margin at the next available position. There is no limit to the number of images that may be attached to a master activity record.
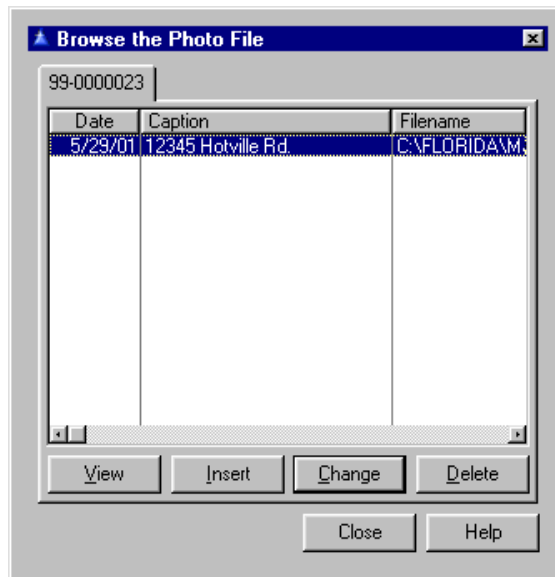
Enter the **Filename** (where the photo is found on your computer), the **Caption** (something that will identify it for you easily is recommended- typically the location is used) and the **Date** the photo is entered into the record. Default is the current date. Press OK when finished.
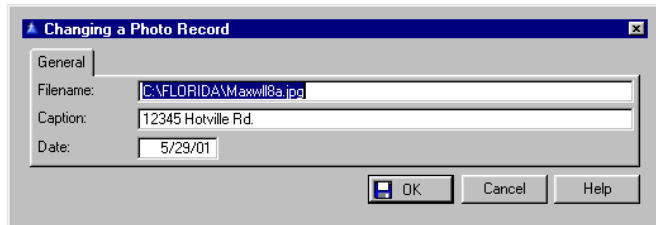
Insert New Activity

When entering new activity, initially the **Opening a Case** screen will appear. Enter the **Zone** and **Originator** numbers. A debug window will track a reported problem of incorrect case number assignment after sending an e-mail. If immediately after pressing the Insert Button on the **File, Activity** window, a window appears containing the words "Number: XX" and "Year: XX", please notify an IMS Customer Service Representative with the exact details of the event.
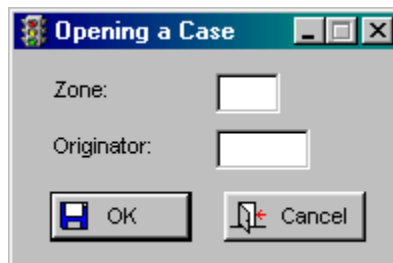
When adding an activity, the header information (Case number, open date and time, description, department, district and assigned to) must be filled in. To add a party to the activity, right click anywhere on the window and a popup menu with the options "Insert Party" and "Delete Party" will appear. Select "Insert" and a list of principals will appear.

You may select the person from this list or add a new principal to the file and then select it. (As in previous versions, if you are adding a principal record you may press a hot key in the address or parcel fields to look up the location in the property file residing in the **Building Permits** database.) After the principal is selected you will be shown a list of roles for the party. (After existing data is converted there will be two roles created: Violator and Reporter.) After you select a role a tab will be added to the window with the role abbreviation.

If the Activity Location option selected was "Same as owner's address", if there is a party with the role abbreviation as defined in Setup, Configuration, Settings, "Owner Role", the party's address will be copied into the location information for the activity. (After existing data is converted the owner role will be "Violator".) If the location information is different from that for the owner owner you should set the Activity Location to "Different from owner's address" before adding a party with a role the same as the Owner Role, which will prevent the party information from being copied to the activity location. You then may enter activity location information. The same hot key lookup in the property file is available as described above for the principal file. You may continue to add parties to the activity up to the limit of eight. Multiple instances of the same role are allowed. For example, you could have two parties with the role of "Witness".

To delete a party, right click on the tab representing the party to be removed to get the popup menu and select "Delete Party". Answer OK to the conformation dialog and the tab will be removed. If you are in the process of adding an activity, and have already added some parties, then decide to cancel the addition of the activity, all parties added for the new activity will be deleted. Important note: If you are editing an existing activity and have added or deleted parties in this session, the party changes will remain even if you press the Cancel Button to cancel the changes.

On each tab representing a party in this activity, all of the information displayed starting below the grayed out general information down to just above the comments field is directly from the related principal record. This information will always be the same for all activity which involves this principal. If you edit any of the information about a party (name or address, for example) the principal file will be updated accordingly when you press the Save button. All such fields have a pink background as a reminder. Be aware that this change will appear in any other activity to which this person was a party. If you press Cancel instead any changes to a party will not be saved. The comments field at the bottom of the window is stored in the party record and therefore may be different for each time the principal is a party in an activity. The update procedure for this field is the same as for the principal data: The Save button will update the file, the Cancel button will leave it as is.

If the multiple violations option is enabled, the primary violation will be listed on the Violations Tab. Any number of additional violations may be added using the Insert Button on this tab.

On the General Tab enter the fields that are darker than the rest. Fill in the Case Number, the **Open and Close Dates**, **Email date** (date of the last email transmission) the **Description** of the situation, the **Department** for

this entry, the **District** for this entry, and who this case is **Assigned to**. F3 will bring up the department, district, and employee lists for these fields. The descriptions are displayed alongside the fields.

Press the Photo Button to see a photo for this record on file.

On the Reported By Tab you can only fill out the **Reported By** fields. If you press the F3 Key it will take you to **File, Reported By**, Change Button. If you choose Code Enforcement Officer enter the Code for that person (press F3 for a pop up list).
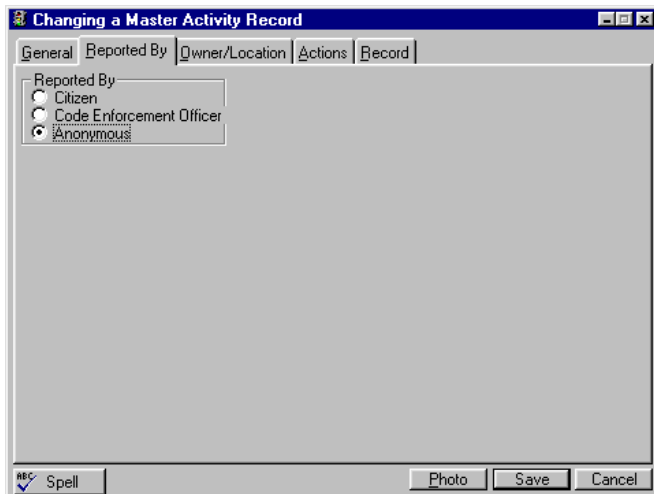
On the Owner/Location Tab you may enter the information here if it is different from the owners address on file in **File, Owner**, Change Button. See owner details for instructions or the **File,** Reported By for the same fields. To view building permits, make sure your cursor is in the Parcel or Address field and press F3. if you have the Building Permit file path active in **Setup, Configuration** then you will be able to see a list of the properties. Select one and then click on the Permits Button and it will show you a list of permits for the property. Select a permit and press the View Button on the contractor tab to view the details about the contractor.

The Clip Button will copy the name and address
displayed under "Owner Identification" to the
Windows Clipboard when it is pressed.

Press Save when done or continue to the next tab.

On the Actions Tab you may fill out other tabs
(General, Reported By, Owner….) here if you like or
go to the appropriate sections in this manual for more
detailed information.   To edit an individual action
taken highlight it and press the Change or Delete
Button. Now you are looking at the individual sub
activities (or actions) for this Master activity.

Use the appropriate button to make your changes.
Whether or not action comments are copied is user
controlled. A checkbox on the Actions Tab of the
Master Activity update form is for this purpose. This
setting may be changed as often as desired, and is
stored locally so that one user's settings do not affect
others.

When the initial action is added for a new activity, the
comments from the master activity record will be
copied to the action comments if the **Copy Comments**
box is checked.

If an additional action is added or the Reschedule Button is pressed, the comments from the prior action will be copied to the new action if the **Copy Comments** box is checked. If the box is not checks the action comments for new or rescheduled actions will be initially blank.

On the General Tab fill in the **Tracking** number, the **Initiated, Scheduled**, and **Completed** dates. Enter the **Action Type** (press F3 for a pop up list), the officer or official that is assigned to this activity (**Assigned to**), the name of the **Letter** or **Notification** to be printed and sent to the owner of the property/incident in question. **Comments** are notes you want to keep on file. This is a 60 character alphabetic field. The **Letter Printed** field will show the most recent date that the notification letter was printed for this activity.

When importing property information from the Building Permits property database into an activity, if the comment field in the master activity record is empty the legal description will be copied into the comments field. When importing property information from the **Building Permits** property database into a principal record, if the comment field in the principal record (File, Principals, Change Button, Comments) is empty the legal description will be copied into the comments field.

Note that this comments field is associated with the principal, not any particular activity. The comments field that displays for each party in an activity is unique for each combination of activity and principal, and may be printed in reports and form letters. The comments field in the principal record is not available in letters and reports.

Time Spent is a record that allows the code enforcement official to record the time spent on the action to the nearest tenth of an hour. The field is located on the left of the action update window just above the comments. This field is available for use on action reports and form letters. The footer page of the action report now includes a summary of the time spent by Action Type, District, Department and Employee. The number to the right of the action count is the total hours spent.

Reschedule   The Reschedule Button retains the same information but allows you to enter another batch of information regarding this activity under the current date and will rename your tracking number to the one following the last one. It adds a new entry for this activity., you just change what you want.

Fine	Before a fine may be attached to an action one or more fine types must be created using **Setup, List Maintenance,** Fine Types.

Print	You may immediately print this information out by pressing the Print Button. You will have the chance to preview it before printing. See Print Preview for details.

The Email Tab is available for updating or adding an action.   See **Setup, Configuration**, Email Tab for this option.

Go through and fill out who the message is **From, To**: etc.   Fill this page out as you would normally in your email program when creating an email message.

CC = carbon copy to someone
BCC = Blind carbon copy (no one else can view the recipient's name)

Attach = name of the file you are attaching. You will need to pick it from your directory. When e-mail attachments are added using the Windows file dialog box ("..." button), they are appended to any files that may have already been selected. The concatenation character is the vertical bar ("|").

Message = detailed message to the recipient.
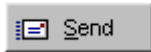
:□ Send

Send Button
This button will send the current email out.

The Record Tab records the changes to this entry. Press Save when you are finished and want to keep the information. Press Cancel to exit without saving the changes.

Action Calendar

Go to **File, Action Calendar**. Scheduled actions may now be viewed and updated from this calendar format window. The calendar window has a tab for each active inspector, plus one for all inspectors. All of the keys that manipulate the standard IMS popup calendar work the same ways in this calendar. The calendar is initially set to the current system date and all inspectors. The total number of actions scheduled for the day is shown to the right of day at the top of each cell. For each action the action type name is shown. A color code is used to indicate the status.

Actions that have been closed are shown in green, and those still open are shown in red. To view an activity in the calendar, double click on the action.   From the activity update window actions may be added or rescheduled, and will appear on the calendar after the changes are saved. If the display resolution of the workstation is 1024 x 768 pixels or greater, the calendar will display up to nine actions per day, allowing 32 characters per action. For lower resolution workstations the calendar will display four actions per day, at up to 16 characters each. Any number of actions for a day may be added regardless of how many the calendar can display.

A system for automatic scheduling of actions was added. A new file of schedule types contains the information needed to determine the next schedule date (**Setup, Lists, File Maintenance**, Schedule List, Edit button). Each schedule is assigned a name and an abbreviation. Each situation description (violation class) may be assigned a schedule (Setup, Lists, File Maintenance, Description List, Change button, Schedule). If an activity has multiple violations the schedule is determined by the primary violation class. Each action type may also be assigned a schedule using **Setup, Lists, File Maintenance**, Action Type List, Change button, Schedule Override. Whenever an action is added to a case, the scheduled date is calculated from the schedule assigned to the situation description, unless a schedule is assigned to the type of the action being added, in which case the schedule for the action type will override the schedule for the situation description.

Principals

Go to **File, Principals**. The master activity file still exists, but there is greater flexibility in assigning the parties related to the situation. There is no longer a separate violator and reporter file. There is a single Principal file which contains all persons that have ever been a party to an activity. In fact it could contain a full citizen list without regard to whether any were ever a party to an activity. The master activity record is not directly related to the principal file. A new file, called

the Party file, defines the link between an activity and a principal. For each involved party there must be a defined role, which is the part this party played in the situation, such as owner, reporter, witness, violator, etc. A new file, called the Role file, allows the user to name the roles to be used. Previously an activity was associated with a specific violation class (referred to as Description on the main window). This link still exists, except only for the primary violation. An unlimited number of additional violations may be related to the activity via a new violation file. The database then looks schematically something like this:

```
Master(Activity or Case)
  |-> Violation -> Class
  |-> Violation -> Class
  |-> Party
  |    |-> Principal
  |    |-> Role
  |-> Party
  |    |-> Principal
  |    |-> Role
  |etc. up to 8 parties, unlimited violations
```

Any number of actions may be associated with an activity (that has not changed). There is a limit of eight roles in the system and eight parties to an activity. This limit exists because for each role defined a set of fields must be added to the list of fields available for situation and action reports and form letters. Allowing an unlimited number of roles to be defined would require an unwieldy list of fields to choose from when designing a report. (For an action report, for example, over 120 fields are available for a report: 23 from the master record, 19 for each action, 9 for each of up to 8 parties, and 9 for each violation.)

Allowing multiple violations on a single activity is an option that requires a license. When it is installed any number of violations may be associated with a case. Each violation may have its own opened and closed date and time, notes and comments.

One of the violations must be coded as the primary violation, which provides the basis for scheduling actions. When an activity is added the **Description** field (unchanged from previous versions) will define the primary violation class. When this field is filled in the violation will be automatically added to the activity and flagged as the primary violation. If the multiple violation option is installed a tab labeled "Violations" will appear. On it will be a list of all violations for the activity.

The primary one will be checked (and will always be first in the list), and closed violations will be grayed out. You cannot assign more than one violation as the primary one. To change the primary one, use the Change Button on the Violations Tab to uncheck the **Primary** checkbox, then check the box on the desired violation. The **Description** abbreviation and name on the General Tab will be automatically changed to reflect the new primary violation. When the multiple violation option is not installed (or is disabled by unchecking "Allow Multiple Violations" in **Setup, Configuration**, settings) the Violations Tab will not appear and the one primary violation will be displayed in the **Description** field on the General Tab.

Convert existing data

The violator and reporter/initiator files will be merged into a single principal file. (Actually, the principal file was introduced in version 2.100, but was given a dual identity matching the old file definitions.) For each old master record a new master record will be created. The location information will be copied as is from the old to the new master record. For each link from the old master record to the old violator record a party with a role of "Violator" will be created to link the new master record to the associated record in the new principal file.

If the old master record had a link to the reporter file (the activity was coded as reported by a citizen) a record will be added to the party file with a role of "Reporter" that links the new master record to the associated record in the principal file that corresponds to the record in the old reporter file. For each master record a violation record will be created and flagged as primary.

Note that in previous versions the window at **File, Activity**, Change had a tab labeled "Owner/Location" which will not appear in this version. The tab label will instead be "Violator". In previous versions there were two hard coded parties to each activity: On the window tabs they were displayed as "Reported By" and "Owner/Location". In the standard report field list they were identified as "Reporter" and "Violator" respectively. It was necessary to create a role for each of those labels as identified in the report field list to provide support for pre-existing reports. Once this version is installed the labels on roles may be changed as desired, but any reports that used the old field labels would have to be changed accordingly. Changing the abbreviation or name of a role will not affect its relationship with existing activity or principal records, but it will affect existing reports, since the fields are identified by the abbreviation.
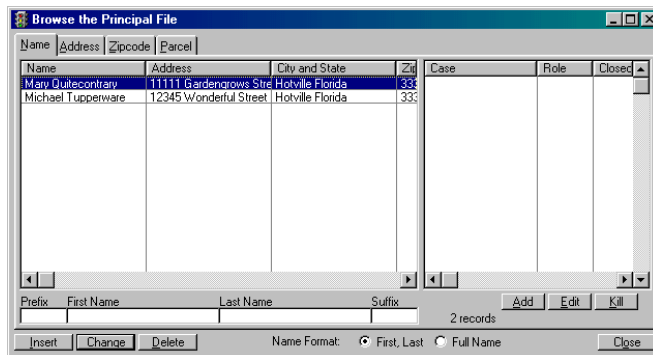
The display format of a name in the Principal file may be set for each principal. The default is the first name, last name format of previous versions.

The option to suppress the name prefix and/or name suffix fields is available when this format is used. If the Name Format box is checked in **File, Principal**, Change Button, the name may be entered and will be displayed as a single 72 character field instead of the four individual fields normally shown. It will be displayed in the selected format on all master activity records to which that principal is a party. When browsing principals (**File, Principal**) an option is available to search for a name using either the first, last or full name format.

The **Hide** checkbox allows hiding all of the information to users with view only access. When a principal with the **Hide** box checked is a party to a master activity, the tab on which the party would be displayed is also hidden to view only users.

Add a new case

You will then be taken to the Master Activity File to add new information .

Reported By

Go to **File, Reported By**. This file contains the detailed complaints, reports, calls and the people who reported the information to you.

You can quickly search on a person by entering information in the box in the lower left hand portion of your screen. If you do not have this information available then you may search by clicking on the appropriate tabs.

Each person who reports information will also have the specific cases attached to his/her entry. These are displayed to the right of the main information. You may edit the case information separately by pressing the Edit Button, where you will go to the Actions Tab of the Master Activity file. To insert new information press the Insert Button. To edit press the Change or Delete Button.

Spell

Spell checking is available for form letters if users have Microsoft Word installed on their computer. If a Spell Button appears on the window it means Word is present. If the button does not appear, either Word is not present or is an incompatible version.

On the General Tab fill in the **Notes** section with comments or a contact phone number. Enter the **Prefix** (Mr., Ms, Miss, Mrs.), the **First** and **Last Name** and the **Suffix** (Jr., Sr., III). Add the **Extra Address Line** (for emergency contact), the **Street Number**, the **Dir**ection (N, SW, etc.), the **Street Name**, and the **Apartment** number, the **City and State**, and the **Zipcode**. Also add the **Parcel Number** of the property visited for this report. **Phone Number** is the contact phone number for the person who owns the property concerned or for the person who reported the incident. **Comments** are your notes you want to keep on file about this person, property or activity. Press the Save Button to keep the changes you have made.

To edit the individual cases for this entry highlight the case and press the Add, Edit, or Kill Button. To add a new case press the Add Button. To make changes press the Edit Button. Highlight the entry again and press the Edit Button once more.

The fields that you may edit are darker than the rest. Make changes to the following fields as shown in the **Activity** file.

Owners   Go to **File, Owners**. Information about the owners of the property about which a report or activity is made on are stored here. Each entry will have individual cases attached to it on the right hand side of the window. You may edit or view these separately. You may quickly search through the owners by typing the name, address, zipcode or parcel number in the box in the lower left hand side or the window or use the corresponding tab to sort. On the Name Tab you will find the prefix, first name, last name, and then suffix.

To add new owners press the Insert Button. To edit existing owners highlight the entry and press the Delete or Change Button.

Fill in the same type of information as you did in Reported By. To edit the case information with the same details. To edit individual actions.

Utilities

Reformat Case Numbers

Go to **Utility, Reformat Case Numbers**. The program runs the utility automatically. You may push the Cancel Button to abort the process. It will reformat all case numbers according to the current case number format.
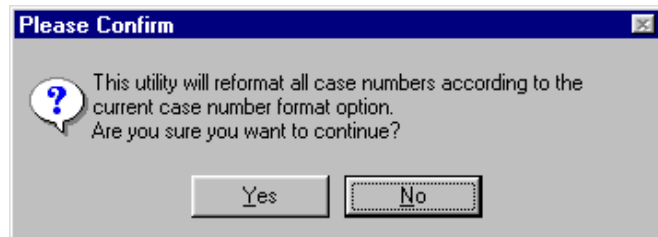
Press Yes to proceed.

Purge Orphan Action Items

Go to **Utility, Purge Orphan Action Items**. This utility is rarely if ever needed, but does no harm if used when not needed. It will check each action record in the database and discard any that are not related to an existing activity record. The term "orphan" is used because the action file is a child of the activity file (a single action record may be related to multiple action records, but an action record must be related to one and only one activity record); thus an action record with no parent activity record is an orphan. See Parent/Child Relationship Rules for more details on this subject.

Set Originator from Employee

Go to **Utility, Set Originator from Employee**. This utility will set the originator of all cases with no originator to the employee to which the case is assigned.

Please Confirm ☒

? This utility will set the originator of all cases with no originator specified to the initials of employee to which the case is assigned. If the initials field is blank the abbreviation field will be used. Are you sure you want to continue?

[Yes]   [No]
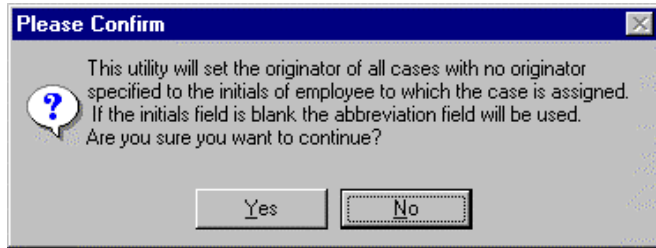
Set Zone from Default

Go to **Utility, Set Zone from Default**. This utility will set the zone for all cases with a blank zone to the current default zone.

Please Confirm ☒

? This utility will set the zone of all cases with no zone specified to the default zone. If the default zone is blank it will do nothing. Are you sure you want to continue?

[Yes]   [No]
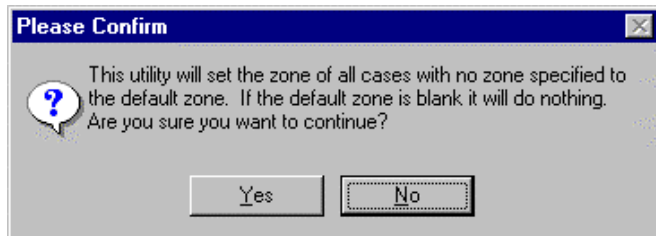
Import/Export

Go to **Utility, Import/Export**. See more detail in the Setup area. This utility will import or export files from Building Permits. The data paths must be specified in Setup, Configuration, Data Paths Tab.

Export Data Files
Import Data Files

Import Data Files   _ ☐ ☒

Press to begin >>   ✓ Begin   ✗ Cancel
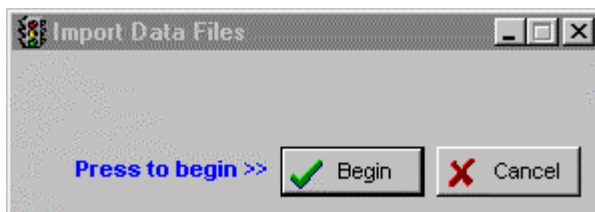
Standard Reports

You may print reports based on a variety of fields such as case numbers, address, comments - see the fields in **Reports, Standard Reports**, Change Button, Detail Tab. The ranges of case number and dates used the last time a standard report was run are not used as the

default the next time a report is run. Instead, the case number range will default to all case numbers and the date ranges will default to all dates. The font size of standard reports may be set to any value between 6 point and 16 point. Whenever the font size of a report is changed, the field positions in the detail layout window are scaled to approximate the print positions on the report. The font size applies to the fields in the detail layout window only. It does not affect the report header, parameters page, footer page, or image sizes.

To add new report information press the Insert Button. To edit existing reports as they are defined press the Change or Delete Button. If you have the information just as you want it you may go ahead and press the Print Button. The Export and Import Buttons allow you to bring in information from another location or to export this report to another location. You will be asked to browse your main drive and find where the location is to be for export or import.

Any field that is not fully horizontally visible in the preview window will be truncated when the report is printed. So what you see is what will be printed! You may omit printing the header (parameters) page and/or the footer (summary) page of reports.

When custom text fields are added to reports, the field name in the field selection list will contain the first 20 characters of the text in the field.

Master Activity
Go to **Reports, Standard Reports, Master Activity Reports**. The master activity report optionally prints on the summary page a bar chart of the breakdown of activity by each of the tally parameters (**Description, District, Department, Employee**).

The number of fields available for the Detail Tab depend on the number of roles defined. There are a set of fields available for each role. These are the same ones that are available for the "Violator" and Reporter" categories.

For each set of fields the name in the category column will be the role abbreviation. All existing reports will print as before, as long as the "Violator" and Reporter" roles created when data is converted are not renamed. If a report detail specifies a field for a role that is not used on an activity, the field will not print.

If the multiple violations option is enabled, nine additional fields will appear in the field list when a report is created or edited . These fields will be in a category named "Violation". Note that there will also be a category named "Violator". These two categories are quite different in function; do not confuse them. Each field in the Violation category will print the specified field name for every violation on the case. They will be stacked vertically, with the primary violation first. Note also that the information in three of the violation fields (Class, ClassFull and ClassText) duplicates corresponding fields in the "Master" category, so there is no point in using those in the Master category if the system is configured for multiple violations. The fields in the Master category will print a single value for the primary violation, while those in the Violation category will print a value for all violations, including the primary one.

The master activity report may be printed in any of six orders: case number, parcel number, violation description, department, district, and employee. In all of the orders aside from case number the secondary order will be case number.
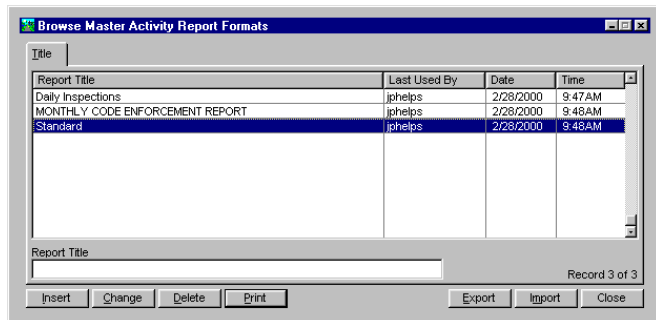
Fill in the **Report Title**, the **Print Order** (currently only Case Number is available). Select the **Case-Opened/Closed Dates**, and the **Completion Status**. If you want to **Omit Images** (photos, maps, etc.), **Omit parameters** (header) and **summary** (footer) **on each page** check those boxes. A checkbox in the parameters window, **Omit bar charts** allows disabling printing of the charts. Because they are part of the summary page they are not printed if the summary page is omitted. If you want to **Draw a line between records** or **start each record on a new page** check those also.

Prior ⇧

Next ⇩

The Prior and Next Buttons simply take you back and forth between records.

On the List Filters Tab select from Use All or Ignore All Buttons in each of the different filter boxes entitled **Description, District, Department**, and **Employee**.

Prior ⇧

Next ⇩

The Prior and Next Buttons simply take you back and forth between records.

On the Detail Tab fill in the **Detail Fields** (*City, Class, Comments, Location*, etc.) and select the margin placements for the items you are going to place in the **Printing Layout** box. You may highlight the entry, right click with your mouse and drag it to the location or use exact measurements by using the Select Button to select an item and place it in the **Printing Layout** box which also makes the entry visible in the Data Field box. Use the Position Button to adjust the position of the item and edit the distances.   Use your cursor to move the blocks of text around in the window. Images will not print if the report has no detail (parameters and/or summary page only).

The Reject Button will reject the entry from the Printing Layout field.

Use the Insert Button to create your own custom designation field. The Delete Button will permanently delete the highlighted record.

Edit Custom Data Field

General

Type
- Line
- Box
- Text

Width 0.000   Depth 0.000

Text

OK   Cancel
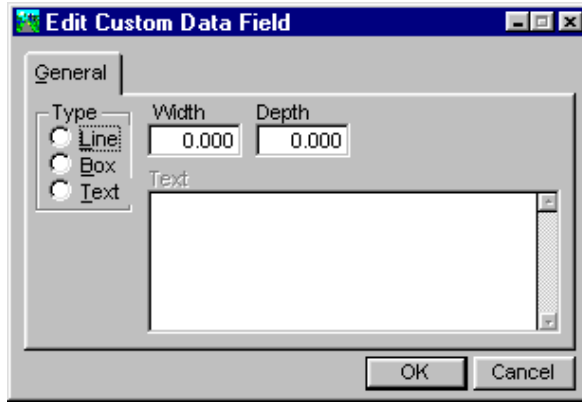
Prior ⇧

The Prior and Next Buttons simply take you back and forth between records.

Next ⇩

The Record Tab keeps the information about when the report was created. See a sample of this report.

Action Reports
Go to **Reports, Standard Reports, Action Reports**. The number of fields available for the Detail Tab depend on the number of roles defined. There are a set of fields available for each role. These are the same ones that are available for the "Violator" and Reporter" categories. For each set of fields the name in the category column will be the role abbreviation. All existing reports will print as before, as long as the "Violator" and Reporter" roles created when data is converted are not renamed. If a report detail specifies a field for a role that is not used on an activity, the field will not print.

If the multiple violations option is enabled, nine additional fields will appear in the field list when a report is created or edited . These fields will be in a category named "Violation". Note that there will also be a category named "Violator". These two categories are quite different in function; do not confuse them. Each field in the Violation category will print the specified field name for every violation on the case. They will be stacked vertically, with the primary violation first.

Note also that the information in three of the violation fields (Class, ClassFull and ClassText) duplicates corresponding fields in the "Master" category, so there is no point in using those in the Master category if the system is configured for multiple violations. The fields in the Master category will print a single value for the primary violation, while those in the Violation category will print a value for all violations, including the primary one.

The action report may be printed in any of seven orders: case number, parcel number, action type, violation description, department, district, and employee. In all of the orders aside from case number the secondary order will be case number.

On the General Tab fill in the **Report Title**, the **Print Order, Start, Scheduled**, and **Closed Dates**, **Scheduling** and **Completion Status** and check the boxes if you want to **Omit parameters** and **summary pages**. Check the boxes if you want to **Draw line between records** or **Start each record on a new page**. See the List Filters Tab for the same information. See the Detail Tab for the same information. The Record Tab keeps the information about when the report was created. See a sample of this report!

Custom Reports

Go to **Reports, Custom Reports, Print Custom Report.** This feature allows running reports created by the Clarion Report Writer 5.0 runtime system. Users that own a copy of Clarion Report Writer will need to upgrade to version 5. It runs from **Citizen Services**.
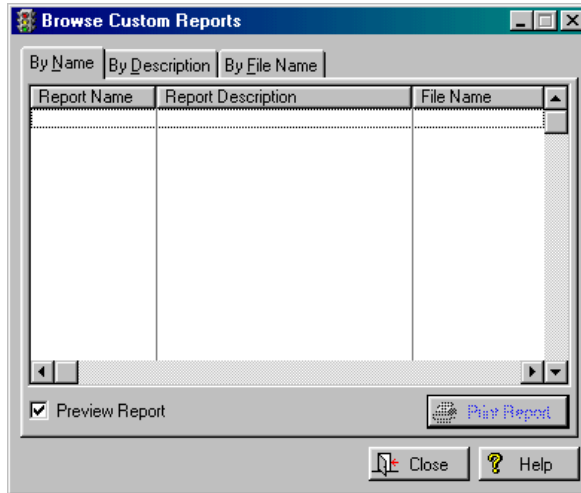
If the Clarion Report Writer has been purchased, it can be invoked from within **Citizen Services** to create a new report or modify an existing report.   However, it is not necessary for running custom reports created elsewhere.

The print function will search the custom report path as specified in the system file (or the current directory if no path is specified) and list all report files. A report file will have a file type of TXR. This is an ASCII text file that can be viewed with a generic text editor such as Notepad.

A report file may contain from zero to any number of individual reports. The report file also contains information about the data dictionary. (The data dictionary defines all file names, field names, sizes and data types, file keys, and relationships between files.) Look for a file named **CITIZEN SERVICES** REPORT.TXR in your computer directory. This file contains an example report of expired contractors. It does contain the complete **Citizen Services** data dictionary. You can add reports to this file, or copy it to another name and add reports to the new file. If a report file contains multiple reports, each report will show up as a line in the list of custom reports.
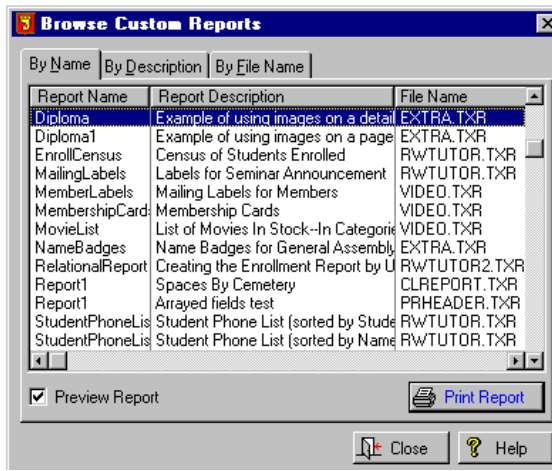
Note that the print preview utility is different for custom and built-in reports. This is because the ReportWriter is a commercial product, and the IMS **Citizen Services** uses a third party report preview package which is more capable than the standard Clarion product. Custom reports refers to external reports that are printed by the Clarion ReportWriter runtime engine.

Note that internal custom reports may exist also. They are printed in lieu of the standard report or form of the same type. The custom reports referred to here are external and do not replace any of the internal reports.

The number of custom reports is unlimited. When you select from the main menu **Reports, Custom Reports, Print Report** you will see a listing of all reports available. The list is made from all files with a filetype of TXR in the folder (directory) specified in the custom report path.   To print a custom report, select it from the list and click on the Print Button or press the Enter Key. If you purchased the Clarion ReportWriter option, you may also create your own reports using the **Citizen Services** database or use data from any of the IMS applications for Windows.

Specialty Reports

Activity by Location

Go to **Reports, Specialty Reports, Activity by Location**. This report will print all activity for a specified range of street addresses, and optionally include the history of actions taken for each activity. The report is in street address order. This report asks for a range of activity dates. Excluded from the report is all activity that was opened after the ending date of the range specified, or opened before the beginning date and is still open, or closed before the beginning date. If the option to include actions in the report is selected, actions that were started after the ending date, or started before the beginning date and are still open, or closed before the beginning date will be excluded from the report.
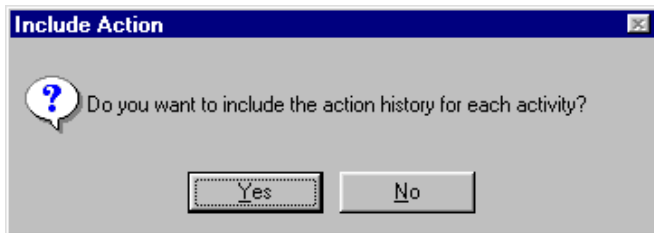
Select a **Beginning** and **Ending Location** Range from the Activity Window that will pop up. See a sample of this report.

Fines by Type

Go to **Reports, Specialty Reports**. This report lists fines collected in a specified date range. The fines are printed in order of fine type, with a subtotal for each fine type. The date range is based on the date settled field in the fine record. This is the date the fine amount was settled and paid. The date the fine was assessed and the original fine amount are also shown even if the assessed date is not in the specified date range.

Print Preview

Preview

> ? Do you wish to PREVIEW this Report?

[Yes]   [No]   [Cancel]
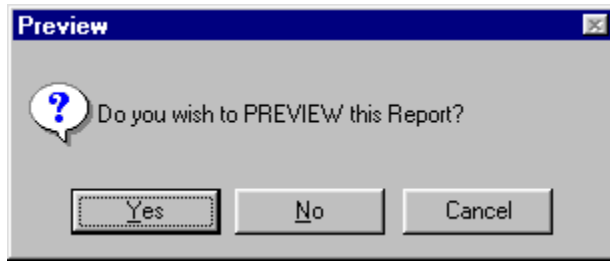
If you answer *Yes* to this query you will be able to view the first page of the report on the screen, along with the following controls prior to actual printing. You can also cancel printing if the report isn't what you wanted, saving time and paper.   See a list of the Print Preview Buttons in the **Glossary**.

The print preview options on the report setup windows (Reports, Standard Reports, Master Activity Reports, Print button, Print Preview tab and Reports, Standard Reports, Action Reports, Print button, Print Preview tab) are now fully functional. The preview option designated as Standard Report Preview is now the same preview as used in most other IMS applications. It has the ability to print individual pages or ranges of pages of a report. The old preview system, which allows displaying multiple pages of a report at one time, is still available with the Alternate Report Preview selection. When the Standard Report Preview option is selected, the Initial Display options are now functional. They allow setting the initial size of the preview display. Previously these options were displayed but were not implemented. The only preview available was the old preview, regardless of the preview method selection.

The print preview options may also be set globally using **Setup, Configuration**, **Print Preview**. Newly created reports will use the global settings. Reports in which the preview options have already been set will retain the local settings. These apply to only **Reports, Standard Reports**.

APPENDIX A

Parent/Child Relationship Rules
June 2001

All of the IMS program databases have parent-child relationships. It is generally bad practice to allow a database to accumulate orphans, which are child records whose parent has been deleted.   Parent deletions can be done in one of two ways depending on the individual situation: either you delete all children when the parent is deleted (cascade) or deny if the parent has any children.   The relationships and dependencies are shown as in the excerpt from the data dictionary summary below:

```
WTask
FILE,DRIVER('TOPSPEED'),RECLAIM,NAME(wtaname),PR
E(WTA),BINDABLE !Work order task
By_Task
KEY(WTA:Task),DUP,NOCASE,OPT                    !Task
Key
By_Order
KEY(WTA:WorkOrder),DUP,NOCASE,OPT
!Work Order Key
WTA:By_Task <<--> TAS:By_Task  Update=CASCADE
Delete=RESTRICT
WTA:By_Order <<--> ORD:By_ID  Update=CASCADE
Delete=RESTRICT
```

The double arrow is on the side of the "many" file in a many to one relationship. So the single arrow points to the parent key and the double arrow to the child. The *Update* and *Delete* indicate what happens when a parent is updated and deleted. A blank means it is allowed and no action is taken. *Restrict* means it is not allowed (the user will get a warning message). *Cascade* means all children will be deleted. In the case of an update action, if a key value in a parent is changed, cascade means all children will be changed likewise.

Appendix B

Large Screen Samples

Master Activity File

Master Activity Report

Action Report

8/21/2001, 2:50PM   Printed by IMS

Rocky Point Rd.   02/08/2000   02/08/2000   00-0000005
  JIM Pill
  JIM Pill   02/10/2000   1ST CONT
  Land clearing and the beginning of installing fence.

    2-8-00 Posted property with stop work sticker at point they are accessing
    prooperty. JP

Specialty Report - Activity by Location

Run: 8/22/01   **TOWN OF Hotville**
      11:32AM   **2725 VeryHot RD.**
Page: 1   **Activity By Location**
                                           R/W Weber Rd.

Case Num	Opened	Closed	Address	Type	Dist
99-0000025	4/24/99	7/12/99	R/W Weber Rd.	GENERAL	4

At the intersection of Weber and Hall there are two holes in the row that the back tires of vehicles get stuck in. If you are heading west on Hall and approach Weber both left and right turn attempts will result in this happening. The holes are in the asphalt apron part of the road.-
Action: 1   Opened: 5/20/99   Closed: 7/12/99   Type: FOLLOW   By: JP
Action: 2   Opened: 7/12/99   Closed: 7/12/99   Type: CLOSE   By: JP
This is a continuing problem and has been fixed until it rains again. (JP)

99-0000034	6/15/99	7/08/99	R/W Weber Rd.	ABAND	1

Abandoned junk car on property across the street. Called BCSO, they ran the VIN and said it belongs to the property owners son. BCSO notified property owner of complaint and told lady to call Town Hall.

Vehicle gone.
Action: 1   Opened: 6/15/99   Closed: 6/16/99   Type: 1ST INSP   By: JP
Action: 2   Opened: 7/02/99   Closed: 7/02/99   Type: FOLLOW   By: JP
contacted Mrs. Smith 6-29-99 at her home. She said her son would move the car. Was to be done last weekend but son got called into work. Jim gave her his card and asked her to have her son call him.

99-0000036	6/30/99	7/08/99	R/W Weber Rd.	ABAND	4

There is a small blue pick up parked on the east side of Weber, just as you turn off of Malabar Road. It has a broken windshield and possibly no tag. It has been there since Sat. or Sunday. Can you please check it out.

Action: 1   Opened: 7/02/99   Closed: 7/08/99   Type: OTHER   By: JP
Tagges by BCSO w/ 24 hour sticker. If not moved by today it will be towed.
See 99-000034

Glossary

Activity A phone call, letter or inquiry that indicates a need for a response from the city in regard to citizen welfare. It could be a dog barking, code violations, health hazards, abandoned property or animals.

Action Result of or response to an activity from a citizen. Typical actions would be letters, citations, inspections, investigations.

Case Number A detailed set of numbers and letters containing information about the case. See Case Number Details.

Citizen A member of the community who either reports activity or is the object of an action.

Code Enforcement Officer The officer employed by the city who is responsible for each activity reported by the citizens. This person will do the paperwork and make decisions on the activities reported. Ease case is assigned to a code enforcement officer

Description These are the descriptions of the items that are reported, like parking/zoning violations, unlawful activity.

General Buttons

Apply Button
Apply the change immediately.

Change Button
Change the access level for the highlighted item.

Change All Button
Change the access level for all items.
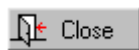
Close Button
Close this window.
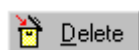
Delete Button
Delete selected entry.

Edit Button
View or change selected entry.
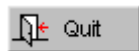
Help Button
Help on this window.

Insert Button
Add a component to this asset.

OK Button
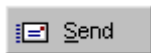Save changes and close window.

Quit Button
Abandon changes and close window.

Send Button
This button will send the current email out.

Print Preview Buttons

This button allows you to change the report so it uses the full available page width.

This button allows you to change the report so it uses the full available page height.

This box shows you what current percentage of full size the report is displayed in. You may enter a new percentage to change the size, or click on the down arrow to choose 25, 50, 75, or 100 percent.

This button takes you to the first page of the report.

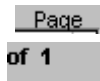This button takes you to the previous page of the report.

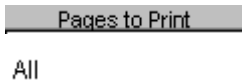This button takes you to the next page of the report.

This button takes you to the last page of the report.

This prints the current page only.

This box allows you to move to any page of the report. You may enter the desired page number, or use the up and down arrows to change the page number (the current page number is displayed.)

This box allows you to choose which pages to print. You may choose All, or enter ranges of pages such as 4-5,8,10-12,15.

This button sends the report as is to the printer.

This box allows you to print any number of copies you wish. You may enter the desired number, or use the up and down arrows to change the number of copies.

This closes the report preview window without printing.

Parcel (Number) This is the identifying number of the property in relationship to a map of all properties within that community. It identifies the property by range, township, section, block, lot, and book.

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Windows Internet
Windows Skills