



File Transfers

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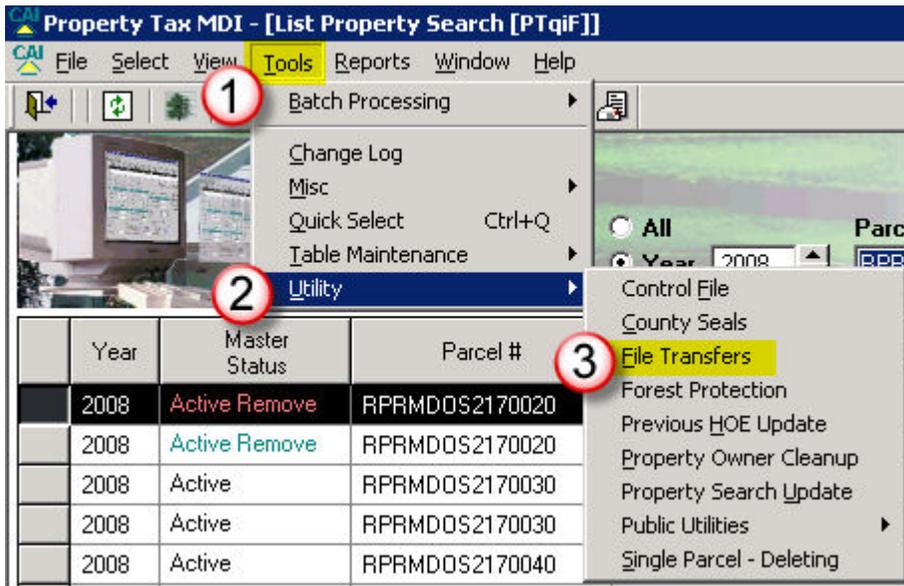
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PREREQUISITE

You must have Microsoft® SQL Server client tools installed on any computer that you want to process file transfers on.

GETTING THERE



1. Click on Tools
2. Select Utility
3. Select File Transfers

FILE PATH, NAME AND EXTENSION

All file transfers require that you provide a file path and filename. For import transfers, you have to specify a file that contains the data you want to bring into the Property system. For export transfers, you have to specify the file where you want to store the data you are copying out of Property.

Each file transfer program has specific requirements for file types. Refer to documentation for each program for details.

EXPORT

In order to export data out of the Property system, you have to specify where you want the data stored (file path), what file you want it to be saved in (filename), and the file type (extension).

FILE PATH

The path should be somewhere that you can find the file after transferring it. The file path will look something like this:

- J:\Property\File Transfers\Exports\
- C:\

When you get ready to email or copy the file you have exported, you will find it in the folder specified in your file path.

FILENAME

The filename should be descriptive enough so that you can locate it and know what is in it. You may want to include the property year and your county's name in the filename, and should also include the name of the data being exported. Here are some examples of filenames:

- Caribou Assessment Notices 2008 Primary – MASTER
- Caribou Forest Protection Change Log – 09 25 2008
- Caribou - Property GIS

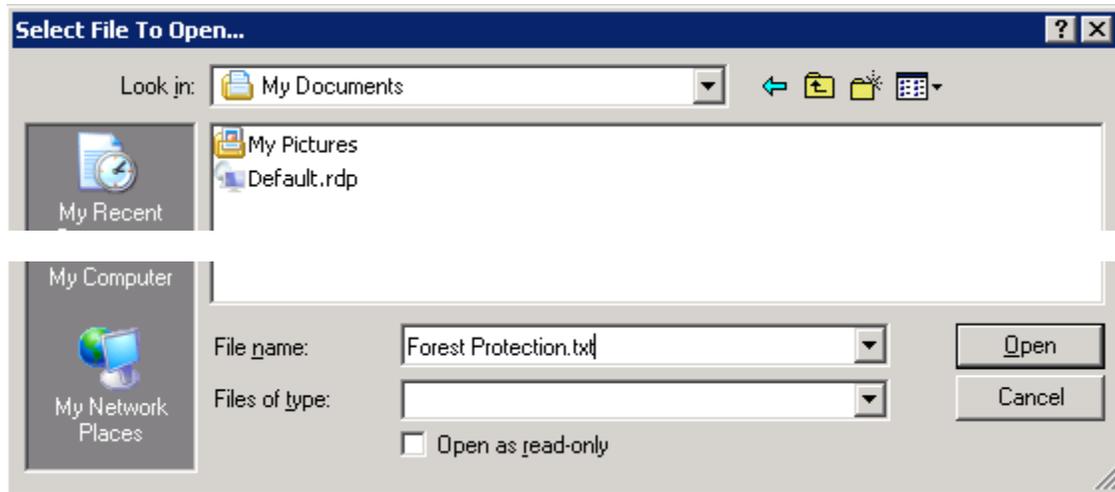
EXTENSION

Each filename has to be followed by a file extension. Most exports from the Property system will require an extension of .txt (indicating that it is a text file). The documentation for each program on the following pages will specify the extension that is to be used.

USING THE BROWSE BUTTON

If you do not want to enter a path manually, you can browse to the folder you want to save to and the path will be created for you.

1. Click the Browse button on the File Transfer screen
2. Browse to the folder where you want to save the file
3. Enter the filename and extension in the File Name field



4. Click Open

You will be returned to the File Transfer screen where you can continue the transfer process as outlined in the following documentation for each file transfer program.

IMPORT

In order to import data into the system, the file containing the data has to be saved on either your computer or network, in a location that you have access to. Files that are sent to you as attachments to email must be saved. You cannot import a file directly from the email message.

You have to tell the program where to find the file, either by manually entering a file path, filename and extension, or by browsing to the file.

USING THE BROWSE BUTTON

1. Click the Browse button on the File Transfer screen
2. Browse to the folder where you have saved the file
3. Click on the filename
4. Click Open

You will be returned to the File Transfer screen where you can continue the transfer process as outlined in the following documentation for each file transfer program.

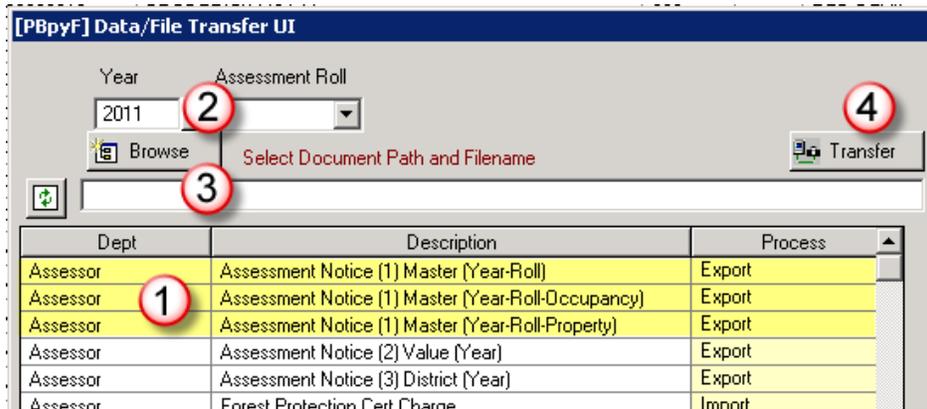
ASSESSMENT NOTICES

If you are outsourcing the printing of your assessment notices, you will have to export the data from the Property system first, and then send the files to your vendor.

MASTER FILE

There are three options available for exporting the Master file. Which option you choose depends on what you are planning to have printed by your print vendor and what, if anything, you are printing in-house.

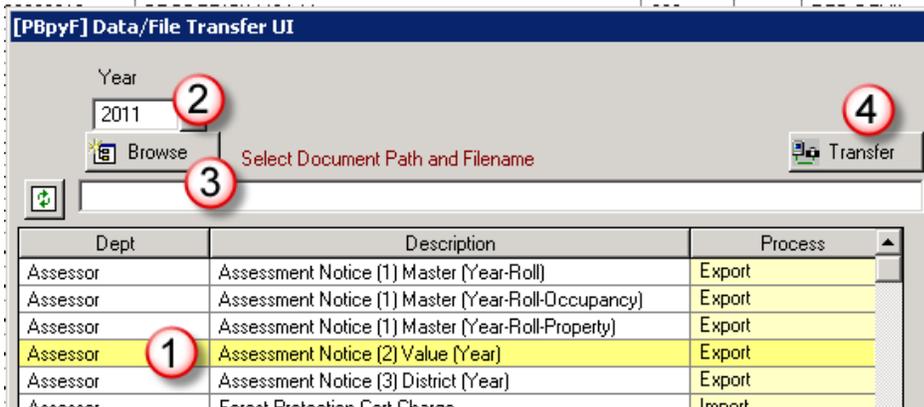
1. Year – Roll
 This will export all parcels for the year and roll you select, regardless of their occupancy and/or property type.
 Use this option if you are outsourcing printing of all parcels.
2. Year – Roll – Occupancy
 This will export all parcels for the year, roll and occupancy you select.
 Use this option if you are planning to outsource printing of one occupancy but not both (for example, if you want to print occupancies in-house and include the occupancy letter, but outsource the non-occupancies).
3. Year – Roll – Property
 This will export all parcels for the year, roll and property type you select.
 Use this option if you are only planning to outsource printing of some property types but not both (for example, if you want to print personal property notices in-house but outsource real and manufactured). Repeat as needed for each property type you need to export (make sure to give each one a unique filename).



1. Option
 Highlight a Master file export based on options above
2. Selection Fields
 Fields will change depending on the option selected in the grid; enter year, roll and/or occupancy as needed
3. Browse & Path
 Refer to Export instructions, page 3
Extension: .CSV
4. Transfer
 Click the Transfer button to transfer the data

Confirm your intention to transfer the data. Repeat as needed depending on option chosen.

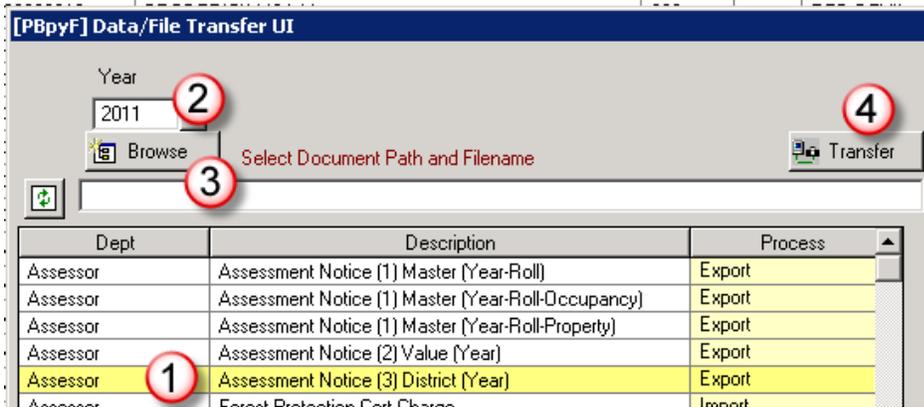
VALUE FILE



- | | |
|---------------------|--|
| 1. Option | Highlight Value file as shown above |
| 2. Selection Fields | Enter year |
| 3. Browse & Path | Refer to Export instructions, page 3
Extension: .CSV |
| 4. Transfer | Click the Transfer button to transfer the data |

Confirm your intention to transfer the data.

DISTRICT FILE



- | | |
|---------------------|--|
| 1. Option | Highlight District file as shown above |
| 2. Selection Fields | Enter year |
| 3. Browse & Path | Refer to Export instructions, page 3
Extension: .CSV |
| 4. Transfer | Click the Transfer button to transfer the data |

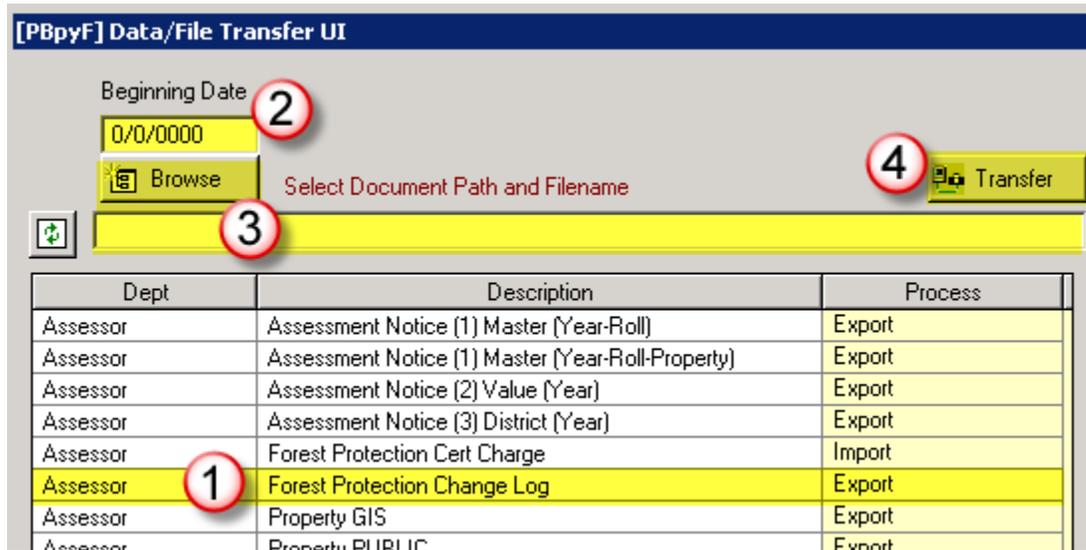
Confirm your intention to transfer the data.

The files can be found in the folder you specified. Make sure you send master, value and district files to your print vendor.

FOREST PROTECTION

EXPORT CHANGE LOG

Refer to Forest Protection documentation to create a change log prior to exporting it.



[PBpyF] Data/File Transfer UI

Beginning Date **2**
0/0/0000

3 Browse Select Document Path and Filename **4** Transfer

Dept	Description	Process
Assessor	Assessment Notice (1) Master (Year-Roll)	Export
Assessor	Assessment Notice (1) Master (Year-Roll-Property)	Export
Assessor	Assessment Notice (2) Value (Year)	Export
Assessor	Assessment Notice (3) District (Year)	Export
Assessor	Forest Protection Cert Charge	Import
1 Assessor	Forest Protection Change Log	Export
Assessor	Property GIS	Export
Assessor	Property PLIRI IC	Export

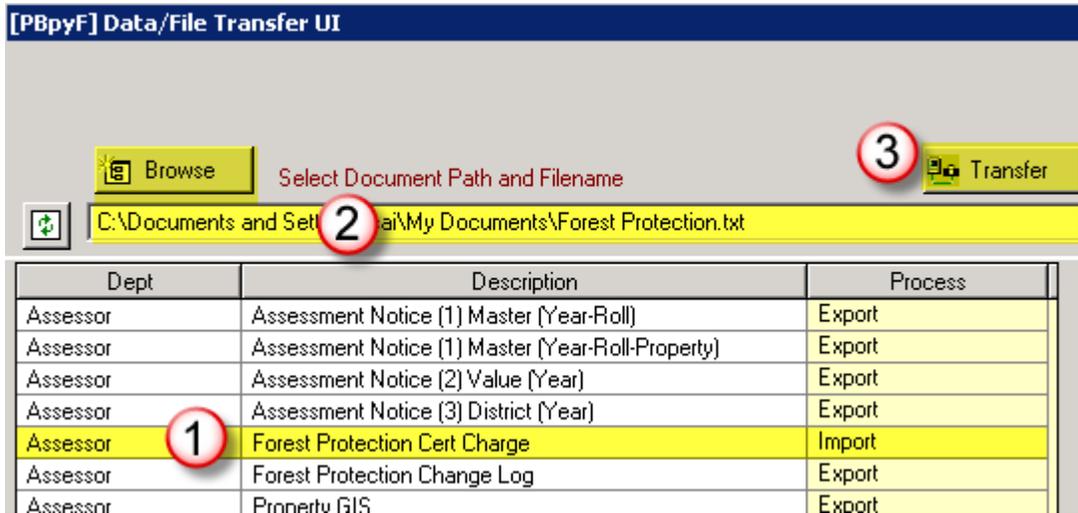
1. Data Type Selection Highlight "Forest Protection Change Log"
2. Beginning Date Enter the starting change date used to create the change log
3. Browse & Path Refer to Export instructions, page 3
Extension: .TXT
4. Transfer Click the Transfer button to transfer the data

Confirm your intention to transfer the data.

Upon completion, the folder where you saved the file will open.

IMPORT CERTIFICATION CHARGE

Importing the forest protection charge will clear the prior year’s charge. Make sure you have run the latest changes for the Idaho Department of Lands before proceeding.

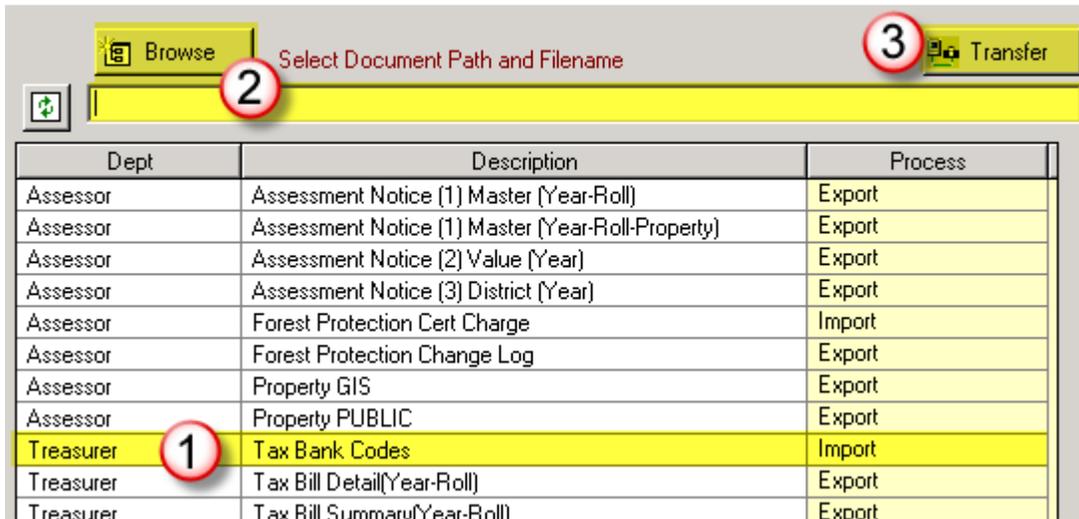


- | | |
|---|--|
| <ol style="list-style-type: none"> 1. Data Type Selection 2. Browse & Path 3. Transfer | <p>Highlight “Forest Protection Cert Charge”</p> <p>Refer to Import instructions, page 4</p> <p>Click the Transfer button to transfer the data</p> |
|---|--|

Confirm your intention to transfer the data.

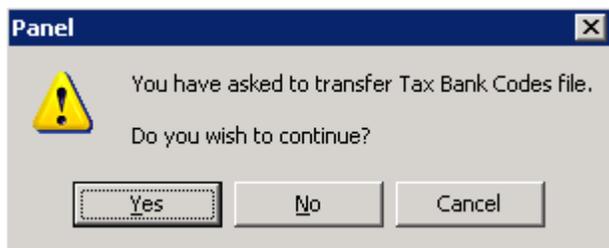
The import process will begin. Upon completion, you will receive a confirmation message. Refer to the Forest Protection documentation to proceed with applying and balancing the charges.

TAX BANK CODES



- | | |
|---|---|
| <ol style="list-style-type: none"> 1. Data Type Selection 2. Browse & Path 3. Transfer | <p>Highlight “Tax Bank Codes”</p> <p>Refer to Import instructions, page 4</p> <p>Click the Transfer button to import the data</p> |
|---|---|

Confirm your intention to transfer the data.



You will receive a confirmation message upon completion.

Refer to the Bank Codes documentation to proceed with applying the codes.

TAX BILLS

[PBpyF] Data/File Transfer UI

Year **2** Assessment Roll **3**

2008 Primary

Browse **4** Select Document Path and Filename **5** Transfer

Dept	Description	Process
Assessor	Assessment Notice (1) Master (Year-Roll)	Export
Assessor	Assessment Notice (1) Master (Year-Roll-Property)	Export
Assessor	Assessment Notice (2) Value (Year)	Export
Assessor	Assessment Notice (3) District (Year)	Export
Assessor	Forest Protection Cert Charge	Import
Assessor	Forest Protection Change Log	Export
Assessor	Property GIS	Export
Assessor	Property PUBLIC	Export
Treasurer	Tax Bank Codes	Import
Treasurer	Tax Bill Detail (Year-Roll) 1	Export
Treasurer	Tax Bill Summary (Year-Roll)	Export
Treasurer	Tax Collection (1) Summary 6	Export
Treasurer	Tax Collection (2) Detail	Export

- | | |
|------------------------|--|
| 1. Data Type Selection | Highlight "Tax Bill Detail (Year-Roll)" |
| 2. Year | Enter the tax year you want to export |
| 3. Assessment Roll | Enter the assessment roll you want to export |
| 4. Browse & Path | Refer to Export instructions, page 3
Extension: .CSV |
| 5. Transfer | Click the Transfer button to export the data |
| 6. Repeat | Repeat steps 1 – 5 for Tax Bill Summary (Year-Roll) |

After clicking the Transfer button, you will need to confirm your intention to transfer the data.

TAX INFORMATION

[PBpyF] Data/File Transfer UI

Year **2**
 2008

3 Browse Select Document Path and Filename

4 Transfer

Dept	Description	Process
Assessor	Assessment Notice (1) Master (Year-Roll)	Export
Assessor	Assessment Notice (1) Master (Year-Roll-Property)	Export
Assessor	Assessment Notice (2) Value (Year)	Export
Assessor	Assessment Notice (3) District (Year)	Export
Assessor	Forest Protection Cert Charge	Import
Assessor	Forest Protection Change Log	Export
Assessor	Property GIS	Export
Assessor	Property PUBLIC	Export
Treasurer	Tax Bank Codes	Import
Treasurer	Tax Bill Detail(Year-Roll)	Export
Treasurer	Tax Bill Summary(Year-Roll)	Export
Treasurer	Tax Collection (1) Summary	Export
Treasurer	Tax Collection (2) Detail	Export
Treasurer	1 Tax Information (Year)	Export
Treasurer	Tax Payments	Import
Treasurer	Tax Unpaid (Year)	Export
Treasurer	Tax Unpaid (Year-Roll)	Export

1. Data Type Selection

Highlight "Tax Information (Year)"

2. Year

Enter the tax year you want to export

3. Browse & Path

Refer to Export instructions, page 3

Extension: .TXT

4. Transfer

Click the Transfer button to export the data

After clicking the Transfer button, you will need to confirm your intention to transfer the data.

TAX UNPAID

There are two options for tax unpaid files. You have the choice of exporting the unpaid listing by year, or by year and assessment roll.

[PBpyF] Data/File Transfer UI

Year: 2008 (2) Assessment Roll: (3)

Browse (4) Select Document Path and Filename Transfer (5)

Dept	Description	Process
Assessor	Assessment Notice (1) Master (Year-Roll)	Export
Assessor	Assessment Notice (1) Master (Year-Roll-Property)	Export
Assessor	Assessment Notice (2) Value (Year)	Export
Assessor	Assessment Notice (3) District (Year)	Export
Assessor	Forest Protection Cert Charge	Import
Assessor	Forest Protection Change Log	Export
Assessor	Property GIS	Export
Assessor	Property PUBLIC	Export
Treasurer	Tax Bank Codes	Import
Treasurer	Tax Bill Detail (Year-Roll)	Export
Treasurer	Tax Bill Summary (Year-Roll)	Export
Treasurer	Tax Collection (1) Summary	Export
Treasurer	Tax Collection (2) Detail	Export
Treasurer	Tax Information (Year)	Export
Treasurer	Tax Payments	Import
Treasurer	Tax Unpaid (Year) (1)	Export
Treasurer	Tax Unpaid (Year-Roll)	Export

- | | |
|------------------------|--|
| 5. Data Type Selection | Highlight “Tax Unpaid (Year)” or “Tax Unpaid (Year-Roll)” |
| 6. Year | Enter the tax year you want to export |
| 7. Assessment Roll | Enter the assessment roll you want to export (only applies if you selected to export by Year AND Roll in step one) |
| 8. Browse & Path | Refer to Export instructions, page 3
Extension: .TXT |
| 9. Transfer | Click the Transfer button to export the data |

After clicking the Transfer button, you will need to confirm your intention to transfer the data.

DOCUMENTATION NOT YET AVAILABLE

PROPERTY GIS

PROPERTY PUBLIC

TAX COLLECTION (1) SUMMARY

TAX COLLECTION (2) DETAIL

TAX PAYMENTS