

Roll Over Reference (Pervasive)

Questions? Call us at (855) 272-7638 and ask for the appropriate support department. Questions for our I.T. department may be submitted by phone (same number), or by emailing tech@bsasoftware.com.

This help doc gives details on the following checklist:

- Print the Misc Totals/Statistics Report
- Back up your database
- Create a database for the new assessing year
- Copy the "previous year" database to the "new year" database
- Archive the previous year database
- Open the new year database
- Print the Misc Totals/Statistics Report again (to make sure you are still in balance)
- Run the roll-over utility
- Enter the new county multipliers
- Set the CPI to zero
- Age/renew improvements
- Print the Misc Totals/Statistics Report again (to make sure you are still in balance)
- Print your Warrant
- Export to Tax Billing

ONE: PRINT THE MISC TOTALS/STATISTICS REPORT

Keep this report in a safe place! These are the numbers for your original warrant.

1. Open the **Reports** menu and select **Assessing Reports**.
2. Open the **Report** field and select **Misc Totals/Statistics**.
3. Set the **Destination** to **Print to Printer**.
4. Select the population (typically, All Records).
5. Click the **Choose Report Options** button.
6. Select the **Special Population**.
7. Select the options you want to apply to the report.
8. Click the **Close** button to return to the Report Setup window.
9. Click the **Ok** button. The Report Options window may appear again, depending on your "Always Prompt Report Options" setting (Program Management⇒User Preferences); if so, verify your settings and click **Close** to proceed.
10. **Make certain that all totals are accurate, including, but not limited to:**
 - Property Class totals for Assessed, SEV, and Capped/Taxable*
 - School District totals for Assessed, SEV, and Capped/Taxable*
 - P.R.E./Non- P.R.E. totals*

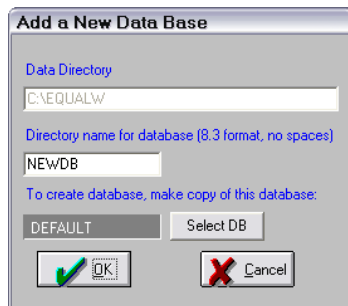
TWO: BACK UP YOUR DATABASE

Give the backup file a name indicating current year balanced totals.

THREE: CREATE A DATABASE FOR THE NEW ASSESSING YEAR

The Examples database shipped with the program should never be used for live data, as it is overwritten each time an update to the software is installed.

1. Open the **File** menu and select **New Database**.
2. If you are on a network and the Data Directory path is not displaying your NetCommon Directory, please call Tech Support.
3. Type the name of your new database in the field provided. It must have a limit of 8 characters, with an optional 3-character extension (i.e., Mason.07).
4. "Default" is a database shipped with the program. Keep Default as the selection and click the **Ok** button.

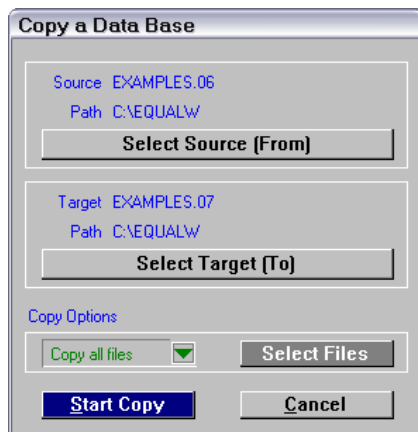


5. When prompted to copy user security settings from another database, answer **No** (unless you are an Equalization department creating a new "clean" database).
6. When prompted to open the new database, answer **No**.

FOUR: COPY THE "PREVIOUS YEAR" DATABASE TO THE "NEW YEAR" DATABASE

Now that a new year database has been created, the currently-opened database is referred to as "previous-year".

1. Open the **File** menu and select **Copy Database**.
2. Your currently-opened "previous year" database should be appearing in the Source box. If not, click the **Select Source** button and select it.
3. Click the **Select Target** button and select your **newly-created database**.
4. **Copy Options** defaults to **Copy All Files**; keep this setting.

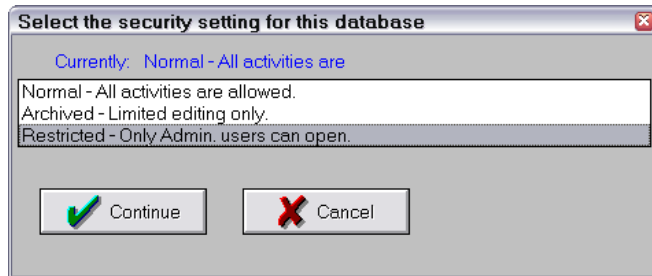


5. Click the **Start Copy** button and answer **Yes** to the prompt.

FIVE: ARCHIVE THE "PREVIOUS YEAR" DATABASE

This is your currently-opened database; now that a new year database has been created, the currently-opened database is referred to as "previous-year".

1. Click **Program Management** on the Tree.
2. Click the **Administrator Options** button.
3. Click the **Archive/Restrict this Database** button.
4. Answer **Yes** when prompted that Administrator Access is required.
5. Enter your password (if no password, click the Continue button).
6. Select the **security setting** ("Restricted..." is recommended).



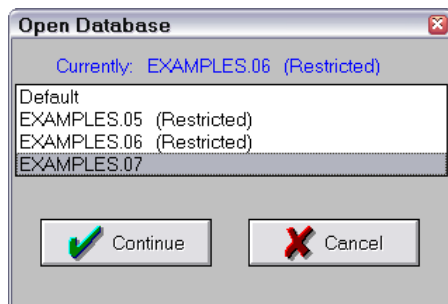
7. Answer **Yes** when prompted to set the security setting.
8. When prompted that you must leave the Program Management screen, click **Ok**.
9. Press [Esc] to close the Administrator Options window.
10. Click anywhere in the Tree other than on Program Management.

The database name appears in the title bar with either ARC or RES, depending on whether Archived or Restricted has been selected. When opening databases, "Archived" or "Restricted" will appear next to those database names.



SIX: OPEN THE NEW YEAR DATABASE

1. Open the **File** menu and select **Open Database**.
2. Select the newly-created database.



SEVEN: PRINT THE MISC TOTALS/STATISTICS REPORT

This is to verify that your numbers are still in balance. The rest of the help doc assumes they are. If they are not, do not proceed – call Tech Support.

1. Open the **Reports** menu and select **Assessing Reports**.
2. Open the **Report** field and select **Misc Totals/Statistics**.
3. Set the **Destination** to **Print to Printer**.
4. Select the population (typically, All Records).
5. Click the **Choose Report Options** button.
6. Select the **Special Population**.
7. Select the options you want to apply to the report.
8. Click the **Close** button to return to the Report Setup window.
9. Click the **Ok** button. The Report Options window may appear again, depending on your “Always Prompt Report Options” setting (Program Management⇒User Preferences); if so, verify your settings and click **Close** to proceed.
10. **Make certain that all totals balance with the Misc Totals report you ran in your Previous Year database. If not, call Tech Support.**

EIGHT: RUN THE ROLL-OVER UTILITY

The Roll-over utility can take a long time, depending on the size of your database.

1. Click **List->Parcels** on the Tree.
2. Click the **Tools** button.
3. Click the **Roll Over Parcels for Next Year** button.
4. You are prompted that this process is irreversible and asked if you have a backup of the database. You may answer No and create a backup, or just re-copy your previous year database in the event something goes wrong (be sure to “un”-archive/restrict it first). This example answers **Yes** to proceed.
5. The **Population** field defaults to **All Records**; keep this setting.
6. Select what to do with the following record status types. If this step is overlooked, it can be done later in the Parcel List⇒Tools button⇒Yearly Status Processing.

Make Splits Inactive – activating this option locates all parcels with a record status of “Split” and changes the status to “Inactive” UNLESS the “Keep Splits Active” option in Program Management⇒Governmental Unit Options⇒Global Calculation Options has been activated. This setting is typically not toggled on.

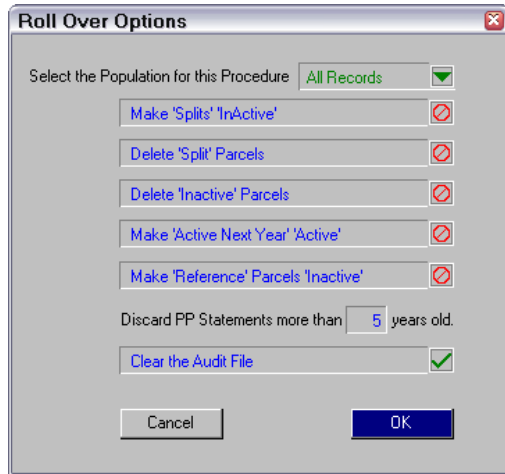
Delete Split Parcels – activating this option locates all parcels with a record status of “Split” and deletes them from the new database. This setting is typically not toggled on.

Delete Inactive Parcels – activating this option locates all parcels with a record status of “Inactive” and deletes them from the new database; this does not include any “make splits inactive” or “make reference inactive” parcels. This setting is typically not toggled on.

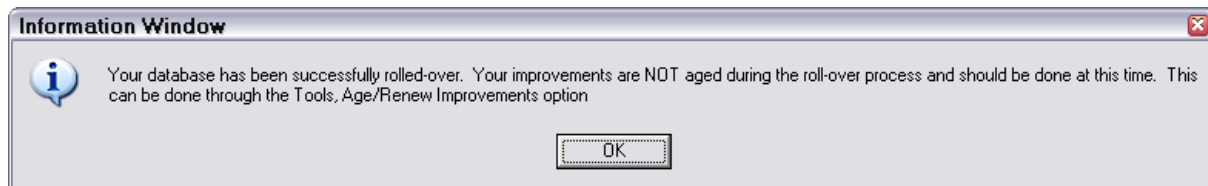
Make “Active Next Year” Active – activating this option locates all parcels with a record status of “Active Next Year” and changes the status to “Active”. This setting is typically not toggled on.

Make “Reference” Parcels Inactive – activating this option locates all parcels with a record status of “Reference” and changes the status to “Inactive”. This setting is typically not toggled on.

7. Enter a number in the **Discard PP Statements...** field. If this step is overlooked, personal property statements may be deleted in the Parcel List⇒Tools button⇒Delete Personal Property Statements.
8. It is recommended that you activate the **Clear Audit File** field to free up disk space. Old audit data may be viewed by opening the previous year database.

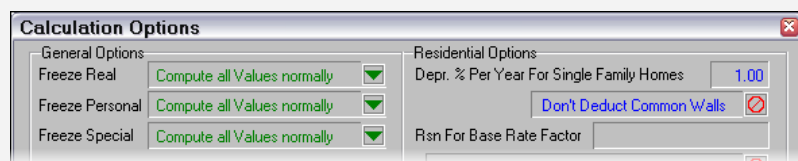
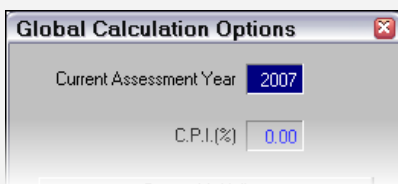


9. Click the **Ok** button.
10. You are prompted that March BOR Values must be frozen prior to rolling over the database. As Freeze MBOR Values should have been the calculation option in your previous year database when you copied it to your new year database, answering Yes should be a safe assumption. **If you are at all unsure, answer No to this prompt**, go to Program Management⇒Governmental Unit Options⇒Calculation Options and change the “Freeze...” fields to Freeze MBOR Values.
11. This example answers **Yes** to proceed.
12. If you have chosen to clear the audit file, the program prompts you that all users must be out of the current year database. Make sure all users are out and answer **Yes** to proceed.
13. You are prompted that this utility should only be done once per year. Answer **Yes** to proceed.
14. This process may take a long time, depending on the size of your database. When finished, you are prompted:



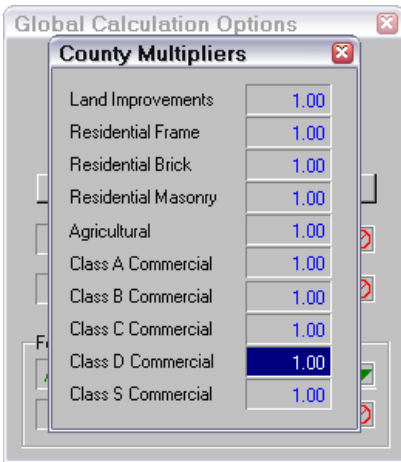
15. Click **Ok** to clear this prompt and move on to the next section of this help doc.

Note: the roll-over utility has automatically updated the Current Year in Program Management⇒Governmental Unit Options⇒Global Calculation Options to the new year. It has also changed the “Freeze...” options in Program Management⇒Governmental Unit Options⇒Calculation Options to “Compute all values normally”.



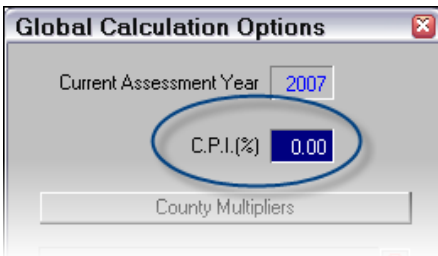
NINE: ENTER NEW COUNTY MULTIPLIERS

Go to Program Management⇒Governmental Unit Options⇒Calculation Options and click the **County Multipliers** button. Enter the multipliers for your county.



TEN: SET THE CONSUMER PRICE INDEX TO ZERO

Go to Program Management⇒Governmental Unit Options⇒Global Calculation Options and set the **CPI %** field to **0** until the new CPI is released some time in the fall.



ELEVEN: AGE/RENEW IMPROVEMENTS

This utility depreciates/appreciates your calculated building values. This may be done to all parcels in your database or a selected few. All value changes resulting from the Age/Renew utility are reflected as Equalization Adjustment in the Current Year Detail window located on the Parcel Edit screen. For building values in override, the utility will recalculate TCv but will not change Assessed or Taxable values.

1. Make a backup of your database.
2. Click **List->Parcel Records** on the Tree.
3. If you will not be doing this for all parcels, set a block around the parcels that will be affected.
4. Click the **Tools** button.
5. Click the **Age/Renew Real Improvements** button. When prompted about a backup, answer **Yes** if you followed step 1 (these instructions assume you did).
6. Select the **Population**.
7. Select **Age** or **Renew**.
8. If Aging, the **Minimum % Good** figures default to the STC recommendations and can be changed.

Age/Renew Process Options

Select the Population for this Procedure: All Records

Do you want to Age or Renew Records: Age

If Aging, Enter the Minimum % Good:

For Residential Buildings	45
For Ag. Buildings	30
For C/I Buildings	40
For everything else	10

Cancel OK

9. Click **Ok**.

TWELVE: PRINT THE MISC TOTALS/STATISTICS REPORT

Check the Previous Values from the current (new) database against the BOR values from the Misc Totals report run in your previous year database. This is to verify that your numbers are still in balance. The rest of the help doc assumes they are. ***If they are not, do not proceed – call Tech Support.***

1. Open the **Reports** menu and select **Assessing Reports**.
2. Open the **Report** field and select **Misc Totals/Statistics**.
3. Set the **Destination** to **Print to Printer**.
4. Select the population (typically, All Records).
5. Click the **Choose Report Options** button.
6. Select the **Special Population**.
7. Select the options you want to apply to the report.
8. Click the **Close** button to return to the Report Setup window.
9. Click the **Ok** button. The Report Options window may appear again, depending on your “Always Prompt Report Options” setting (Program Management⇒User Preferences); if so, verify your settings and click **Close** to proceed.
10. **Make certain that all totals balance with the Misc Totals report you ran in your Previous Year database. If not, call Tech Support.**

THIRTEEN: PRINT YOUR WARRANT

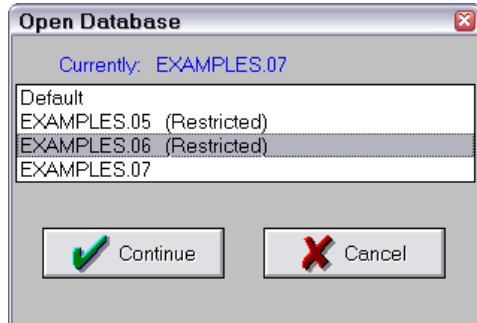
1. Open the **Reports** menu and select **Assessing Reports**.
2. Open the **Report** field and select **Warrant**.
3. Set the **Destination** to **Print to Printer**.
4. Select the population (typically, All Records).
5. Select the **Sort Order**.
6. Click the **Choose Report Options** button.
7. Select the **Special Population**.
8. Click the **Close** button to return to the Report Setup window.
9. Click the **Ok** button. The Report Options window may appear again, depending on your “Always Prompt Report Options” setting (Program Management⇒User Preferences); if so, verify your settings and click **Close** to proceed.

The values on the Warrant should begin with your previous year’s March BOR values and include columns for any adjustments you may process in the future (JBOR/Tribunal, etc.).

FOURTEEN: EXPORT PREVIOUS YEAR VALUES TO EQUALIZER TAX

Exporting is covered in greater detail in the program manual.

1. Open your previous year database.



2. After verifying you are in the correct database, open the **File** menu and select **Export Data**. From the submenu that appears, select **ASCII Export to Other BSA Systems**.
3. Select the **population**. If Block, the block must be set before beginning the export. If Query or Choose Units, the area to set this up is located beneath the "Real/Pers" field.
4. Select the **special population**.
5. Select **Real and Personal, Real Only**, or **Personal Only**.
6. The **Date Range** fields are used in conjunction with the "Use Date Range" toggle fields located to the right of each export file. For example, entering a date range and turning on the "Use Date Range" field for the values file will export only those values that fall within that date range.
7. **Put Export Files in which folder** – if you leave this field blank, the export will place the uncompressed text files in the program directory of the workstation from which the export is being run (typically C:\EQUALW). If you would like the export files placed in a separate area, enter the path or click the Browse button. This example leaves the field blank.
8. **Compress and Backup Export Files** – ignore this button unless you are running a custom export and are directed by Tech Support to use it. Ordinary exports prompt at the end to compress and back up files.
9. Click the **Set all fields to Default Values** button to set the File Name and Export File fields to the default values used by the program.
10. Make sure the Values, Name/Address, and Legals files are being exported. Other files may as well, but are not necessary.
11. If you are exporting a date range of fields in any given file, turn on the **Use Date Range** field; a date range must have been entered in the fields provided.
12. If exporting the Sales file, select whether or not to include confidential sales in the export.
13. Click the **Begin Export** button when ready.
14. When finished, you are prompted that the operation is complete; press your [Enter] key to clear that prompt.
15. You are prompted to back up the files you just made.
16. The uncompressed export files were either placed in your program directory or in another location specified by you (see step 7). Answer Yes to compress those text files into one zip file (typical method). Answer No to provide just the uncompressed text files.