

AMG/IS Rollover Auto FTP Client (.NET & Pervasive)

Questions? Call us at (855) 272-7638 and ask for the I.T. Department, or email tech@bsasoftware.com.

Every year, new databases are created in the Assessing and Tax applications. When using AMG/IS (AccessMyGov/Internet Services), it is imperative that the correct – newest – database is the source of information. If not, you may be displaying incorrect values.

These instructions use the Assessing and Tax applications as examples, as they are the most-frequently displayed. The basic procedures apply to all BS&A data that you will be displaying.

Important Assessing Note – Write Floating Values

Once you've completed your roll over, it is recommended that you run the "Write Floating Values" utility to ensure that the correct information is being displayed before configuring the BS&A Auto FTP Client.

.NET Instructions

1. Open Assessing .NET.
2. **Make sure you're in the correct database.**
3. Click the Application View: **Tables: Parcels.**
4. Click the **Tools** button and select **Write Floating Values.**
5. Select **All Records** as the Population and click **Run.**

Pervasive Instructions

1. Open Assessing.
2. **Make sure you're in the correct database.**
3. Click **List->Parcel Records.**
4. Click the **Tools** button, then click the **Write Floating Values** button.
5. Select **All Records** as the Population and click **Ok.**

Important Tax Note – If You Upload Tax Data

The Tax application reads all previous year taxes from the history file. To ensure that the correct information is being displayed, it is recommended that you update the history file before configuring the BS&A Auto FTP Client.

.NET Instructions

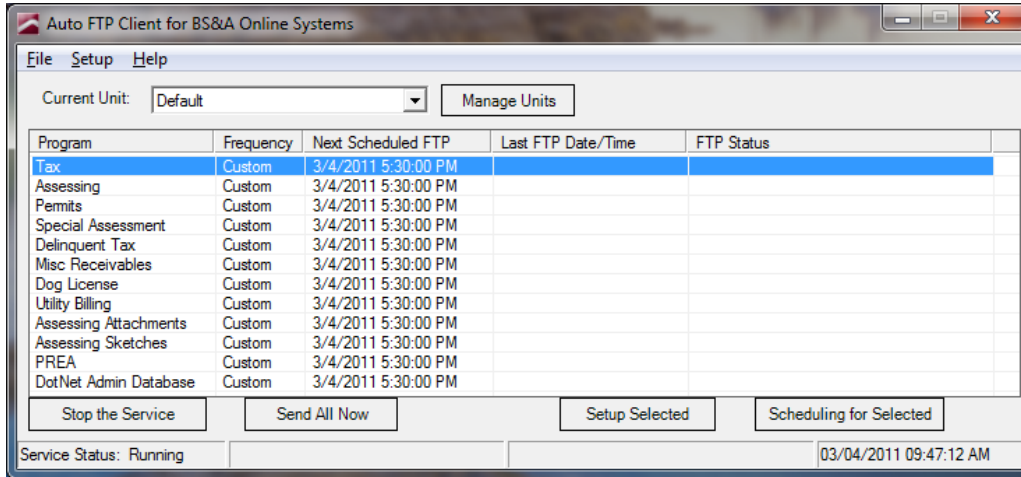
1. Open Tax .NET.
2. **Make sure you're in the correct database.**
3. Click **Utilities** and select **History File Options>Update History Files with Current Tax Info.**
4. Click **Yes** to continue.
5. Select **All Records** as the Population and click **Ok.**

Pervasive Instructions

1. Open Tax.
2. **Make sure you're in the correct database.**
3. Click **Utilities** and select **History File Options>Update History Files with Current Tax Information.**
4. Select **All Records** as the Population and click **Ok.**

Configuring the BS&A Auto FTP Software

1. Locate and open the BS&A Auto FTP Client. This is typically located...
 - ~ On the data server (most installs)
 - ~ On someone's workstation
2. Once opened, the following window should be displayed:



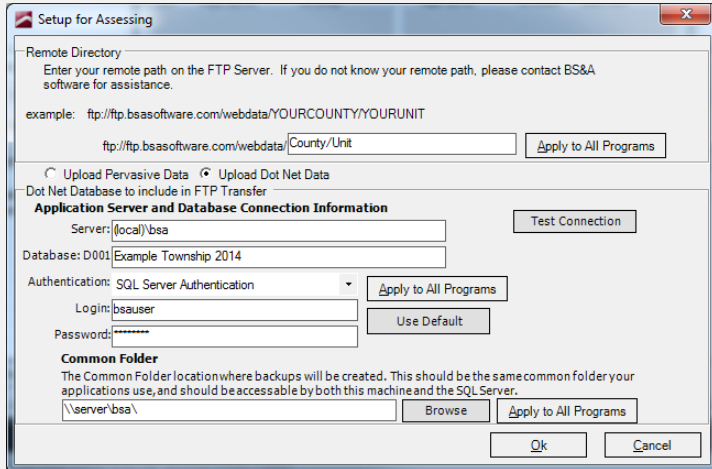
3. Click **Assessing**.
4. Click the **Setup Selected** button.
5. DO NOT MODIFY THE UPPER PORTION OF THE SCREEN (the upload path will remain the same for whichever database is sent to BS&A).
6. Follow the appropriate instructions on the next page, depending on whether you use .NET or Pervasive. The instructions use Assessing as the example, but the same idea applies to Tax.

.NET Instructions

- i. Make sure the Upload Dot Net Data radio button is selected. Be sure the database name is displaying properly. Using Assessing as an example...

“old” database name: Example Township 2014

“new” database name: Example Township 2015



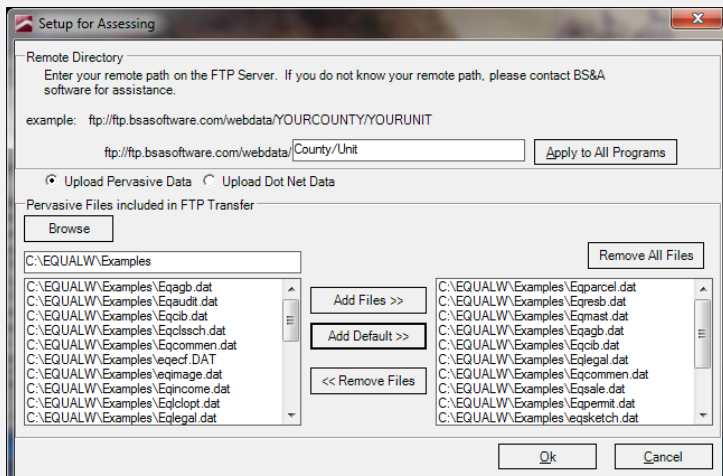
- ii. Click the Test Connection button. If you see green text that says “Connection Test Successful,” proceed. If not, confirm the database name is correct and test again.
- iii. Click the Ok button to return to the initial screen.
- iv. Continue with step 7.

Pervasive Instructions

- i. Click the Remove All Files button located to the right of the screen to clear the box beneath it.
- ii. Click the Browse button and select the path to the correct (new, rolled-over) database. Double-click any file; all files will load into the Setup window. Be sure the path is displaying properly. Using Assessing as an example...

UNC example: “old”: \\servername\share\equalw\database.14 “new”: \\servername\share\equalw\database.15

Local example: “old”: c:\equalw\database.14 “new”: c:\equalw\database.15



- iii. Click the Add Default >> button.
- iv. Click the Ok button to return to the initial screen.
- v. Continue with step 7.

7. Set up the remaining applications (that you display). Refer to the directions above for assistance.
8. Close the Auto FTP.

Assessing Notes

After rolling over and switching to the new year’s database (imperative for updates to name/address changes and current sale information), you must shut off the “Show current year” setting. This should not be flipped back on until values have been finalized, typically in March; BS&A will send a reminder about this.

We can change the setting for you, or you may do it yourself:

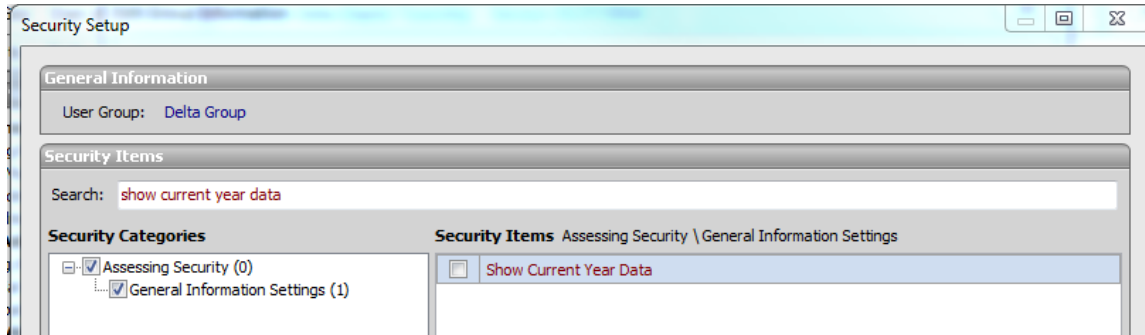
Internet Services Instructions

1. Log in to IS with your administrative username and password.
2. Click **Administration** (located along the left side of the screen).
3. Click the **Group Setup** button.
4. Click the **Tools** tab.
5. The radio button for **Turn ON for all groups** should be selected (); click the **Run** button.

The screenshot shows the 'City of Lawrence internet services' administration interface. The user is logged in as 'dlawrence'. The navigation menu on the left includes 'Administration...', 'Users', 'Edit Your Unit', 'Edit Services', 'Web Themes', 'File Management', 'Audit Trail', 'Data Retrievals', 'Admin Main', 'Site Admin', and 'Back to Main'. The main content area is titled 'Users and Groups Setup' and has tabs for 'Users', 'Groups', and 'Tools'. The 'Tools' tab is active, showing the 'Group Tools' section. The text explains that the 'Show current year data' option determines the year of assessing data to display. It instructs the user to turn the option OFF to display 2009 data. Below this, there are two radio buttons: 'Turn ON for all groups' (which is selected) and 'Turn OFF for all groups'. A 'Run' button is located to the right of the radio buttons.

AMG/IS Instructions

1. Log in to the AMG Administration Application with your administrative username and password.
2. Click **User Group Setup** under the Municipal Administration heading.
3. Double-click the security group and click the **Edit Group Security** button.
4. In the search box, type *Show current year data*, click **General Information Settings**, and toggle the **Show Current Year Data** option.



5. Click **Close**, then **Close** again. Repeat for any additional groups.