Code Enforcement

Quick Start Guide

Welcome to Code Enforcement

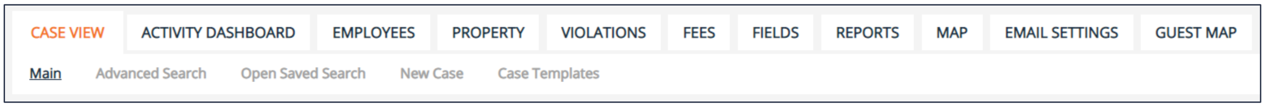
iWorQ is designed so you can customize the software to meet your Code Enforcement needs. This guide was created to help you start performing common tasks in the Code Enforcement system through step-by-step explanations and screen shots.

For additional help or questions, please call technical support at **888.655.1259.**

Technical support and training are always free!

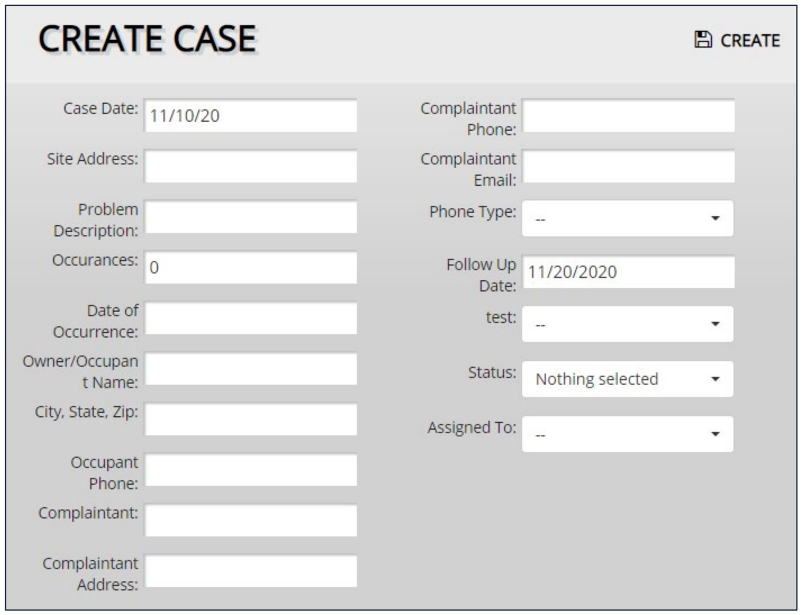
Table of Contents

Creating and Managing Cases



Adding a New Case

1. In the sub-menu, click **New Case**.
2. Fill out the case information. This can be changed later if necessary.
3. Click the **Create** button at the top-right of the screen.

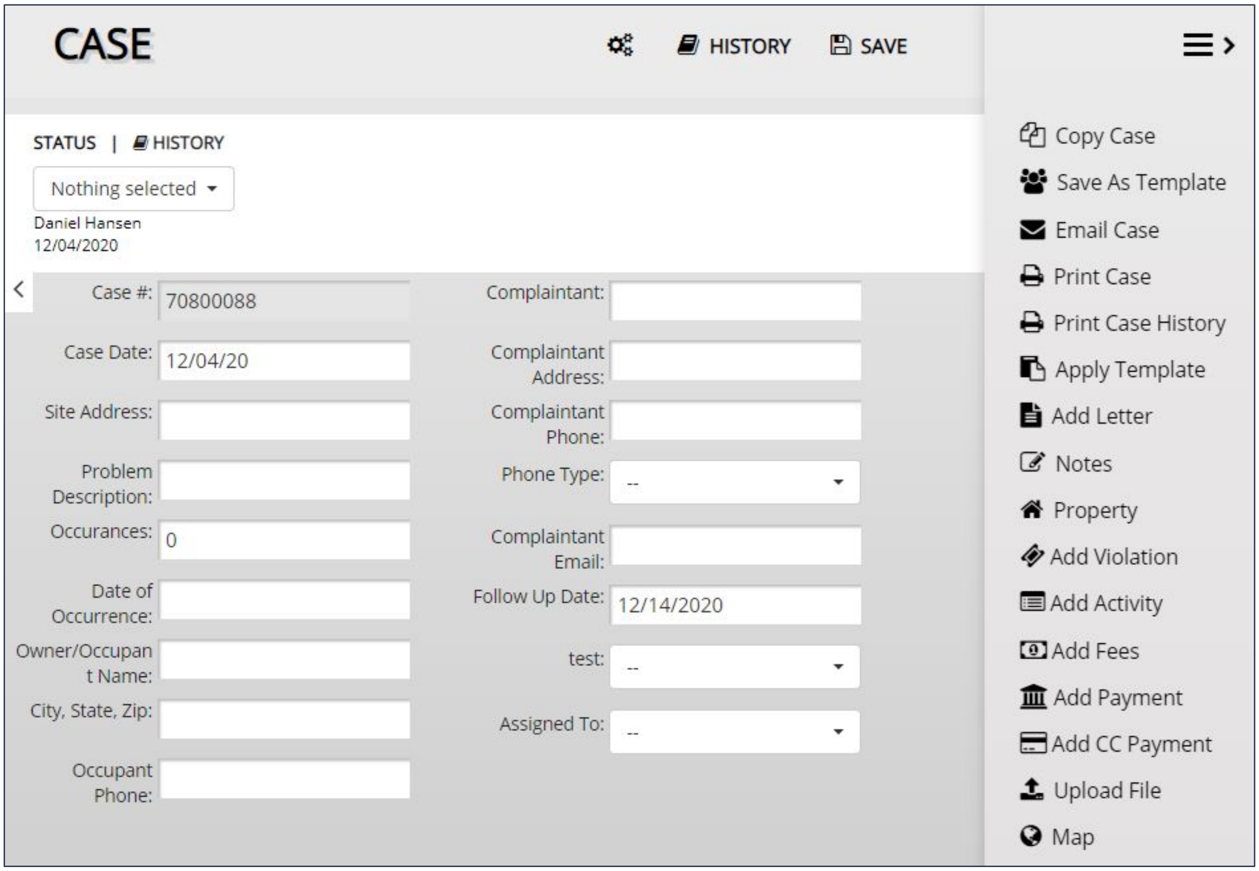


Violations, fees, notes, files, etc. can be added once the case has been created.

To add additional fields or items to the drop-down menus, see page 12.

Modifying Case Data

1. To edit an existing case, click on the case's row within the Case View table.
2. The Case Information window will display all the information attached to the case. Edit the necessary information.



3. Click the **Save** button to preserve any changes made to the case.

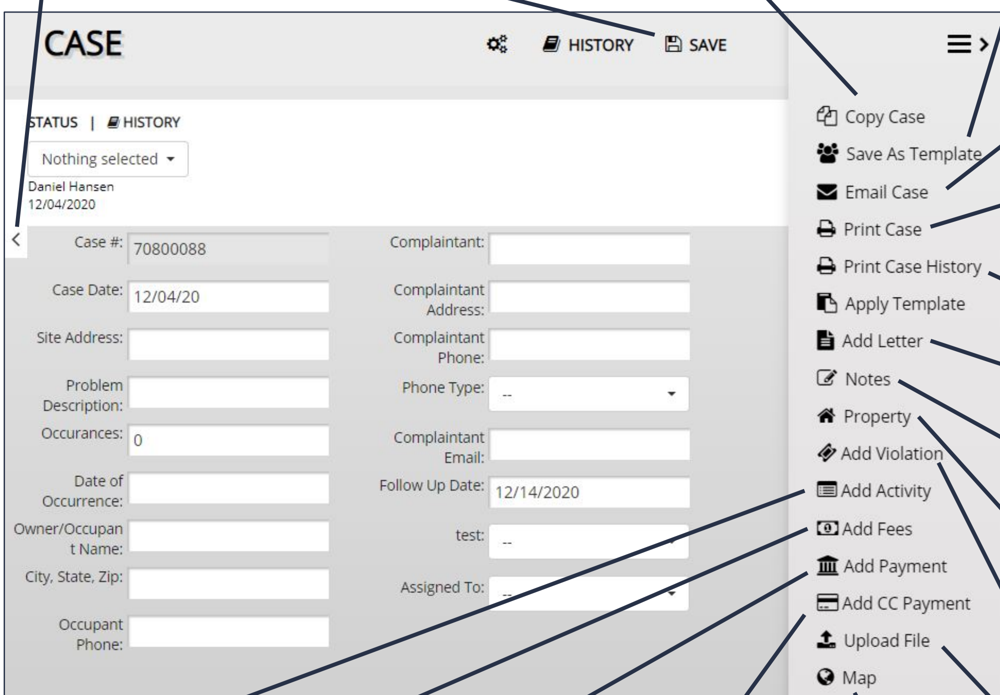
The Code Enforcement Interface

Opens the quick find menu for the case

Saves changes to the case

Creates a copy of the case, assigns it a new number, and immediately displays the new case

Creates a template out of the entered information. Templates can be accessed from the dashboard, or by clicking the Apply Template button below



Emails the case to employees

Prints any recorded data on the case

Prints a history of changes made to the case

Adds a letter to the case

Adds detailed notes to the case

Adds a property to the case

Adds a violation to the case

Adds an activity to the case

Adds a fee to the case

Adds a cash or check payment to the case

Adds a credit card payment to the case

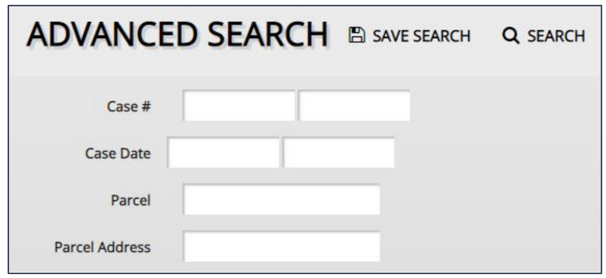
Opens the map

Uploads files or pictures to the case

Advanced Search

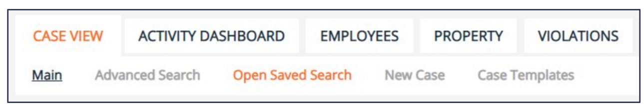
Using the Advanced Search

1. Click the **Advanced Search** button in the sub-menu.
2. The Advanced Search allows the user to search by any fields in the application. Enter the desired search parameters and click **Search**.



3. Searches can be saved for later ease of access. To save a search, click the **Save Search** button.

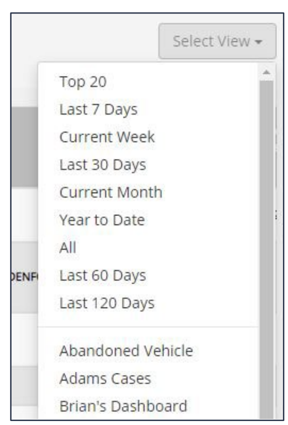
Saved Searches



There are two methods to open a saved search.

1. Click the **Open Saved Search** button in the sub-menu.
2. Select the saved search from the drop-down menu and click **Open**.

3. The user can also edit the search parameters of the saved search by clicking **Edit**.
4. Alternatively, select the saved search from the **Select View** drop-down menu in the upper right-hand corner of the Case View table.



Saved Searches can also be used when creating reports.

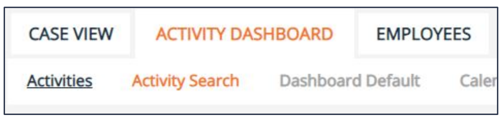
If you have questions about saved searches, contact iWorQ for assistance: 888.655.1259.

Adding Data

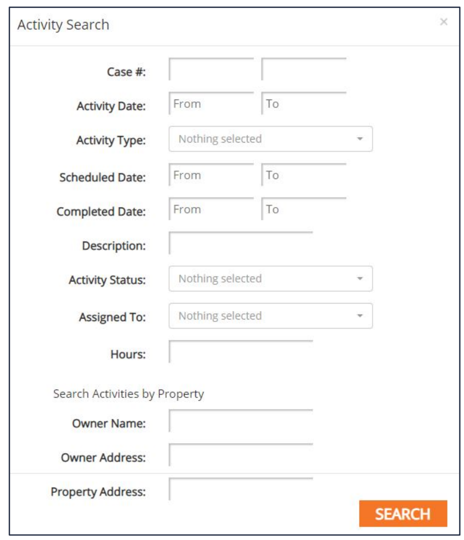
Activity Dashboard

The Activity Dashboard displays scheduled activities associated with cases for a specified time-period. Options to add Activity Types and Statuses are also included in the dashboard and can be added or edited as needed.

Activity Search



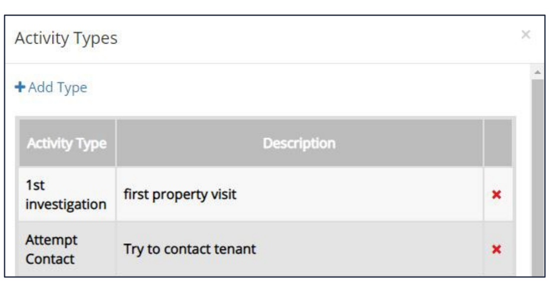
1. Click the **Activity Search** button in the sub-menu.
2. In the Activity Search window, enter the parameters by which to search.
3. Results will display in the table.

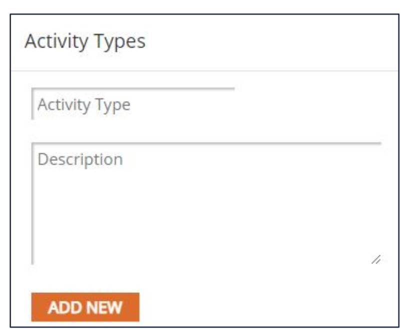


Activity Type

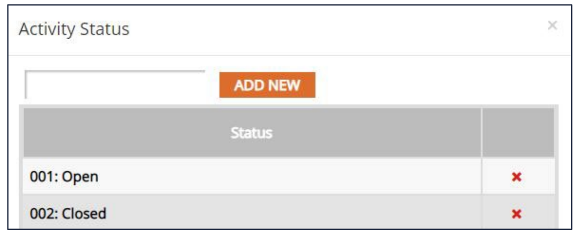
1. Click the **Activity Type** button in the sub-menu.

2. Click **Add Type**.
3. Enter the Activity Type name and description. Click **Add New**.
4. Click on an existing type to edit or click the red X at the end of the type's row to delete.





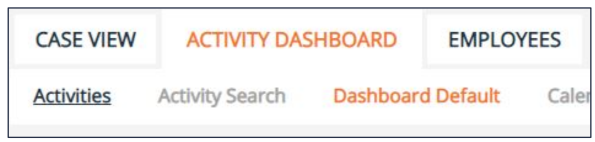
Activity Status

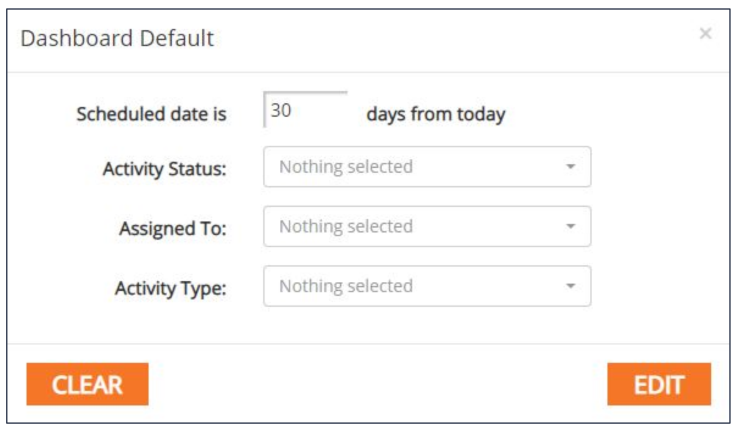


1. Click the **Activity Status** button in the sub-menu.
2. Enter a name for the new Activity Status and click **Add New**.
3. Click on an existing status to edit or click the red X at the end of the status' row to delete.

Activity Types and Statuses cannot be deleted if they are attached to a case.

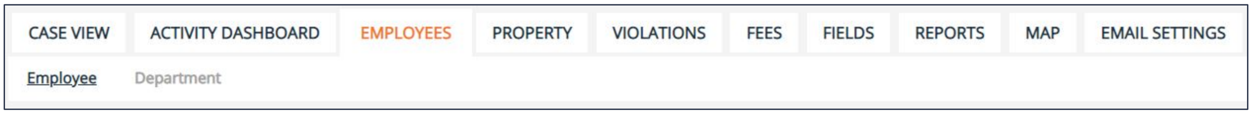
Dashboard Default





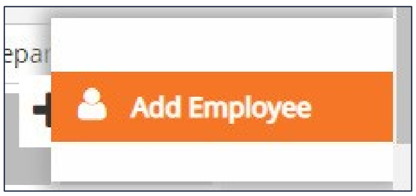
1. To set a default view upon entering the Activity Dashboard, click the **Dashboard Default** button in the sub-menu.
2. Select the parameters for the default view.
3. Click **Edit**.
4. To reset the default view, click **Clear**.

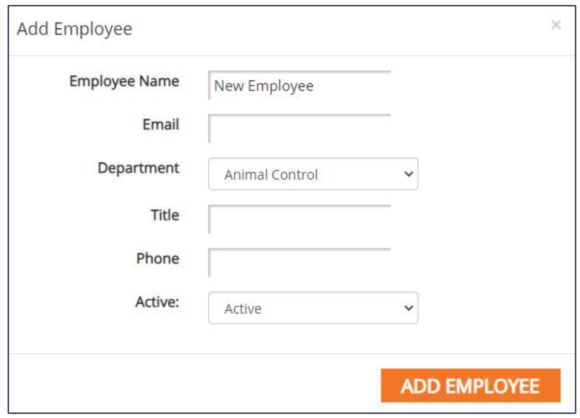
Employees



Adding an Employee

1. Click the **Add Employee** button within the side menu on the right-hand side of the screen.

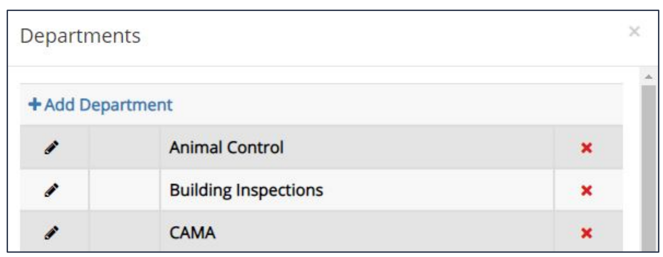




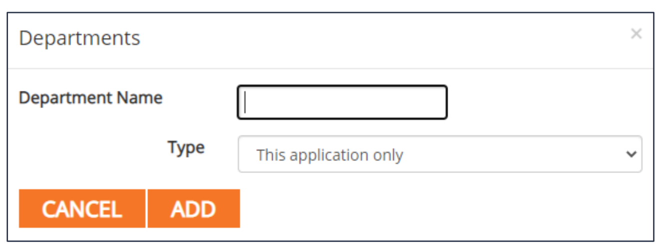
2. Fill in the employee information and click **Add Employee**.

Adding a Department

1. Click the **Department** button in the sub-menu.
2. Click **Add Department**.



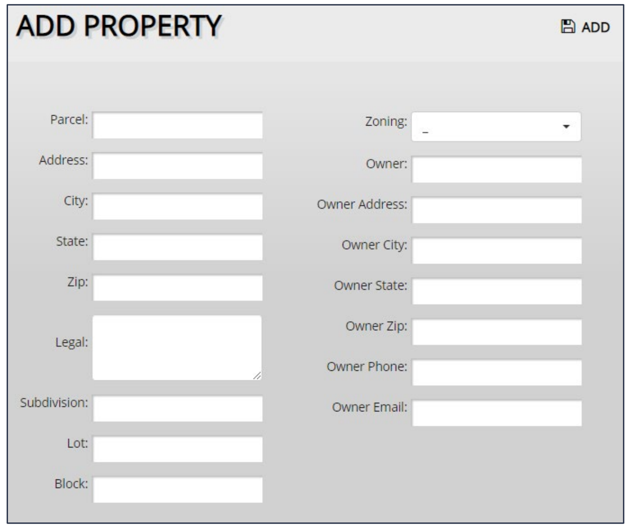
3. Enter the new department name and choose whether to add the new department only to the Code Enforcement application or to all applications.



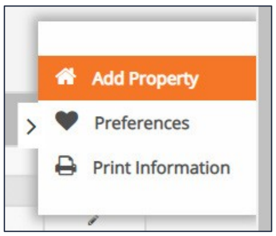
4. Click **Add**.
5. To edit an existing department, click on the row of the department in the table.
6. To delete an existing department, click on the red X at the end of the department's row in the table. Departments cannot be deleted if information is associated with the department.

Property

Adding Property



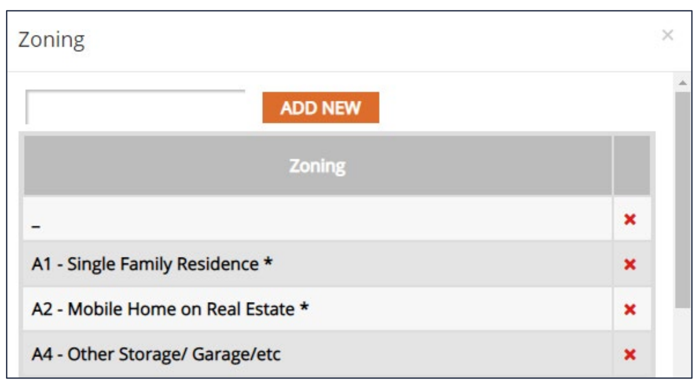
1. Click on the **Add Property** button within the side menu.



2. Fill in the property details.
3. Click **Add**.

Adding Zoning

1. Click the **Zoning** button in the sub-menu.
2. Enter the zoning title into the textbox and click **Add New**.
3. To delete an existing zoning label, click on the red X at the end of the zoning label's row in the table. Zoning labels cannot be deleted if information is associated with the zoning label.

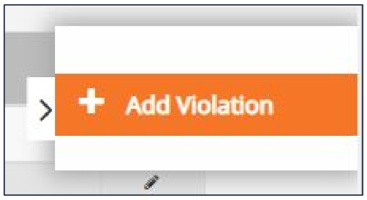


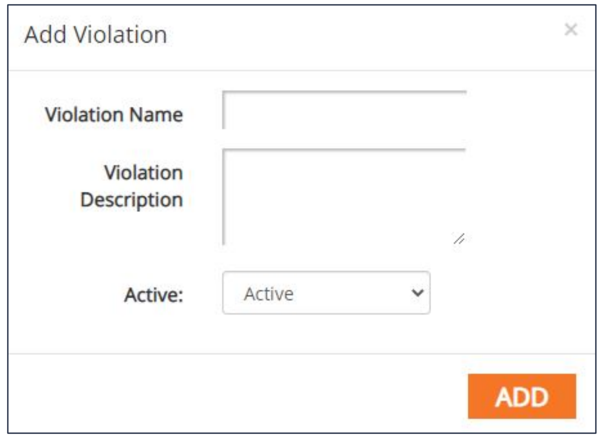
We can upload your property information into your application. Call Technical Support at 888.655.1259.

Violations

Adding Violations

1. Click **Add Violation** in the side menu.



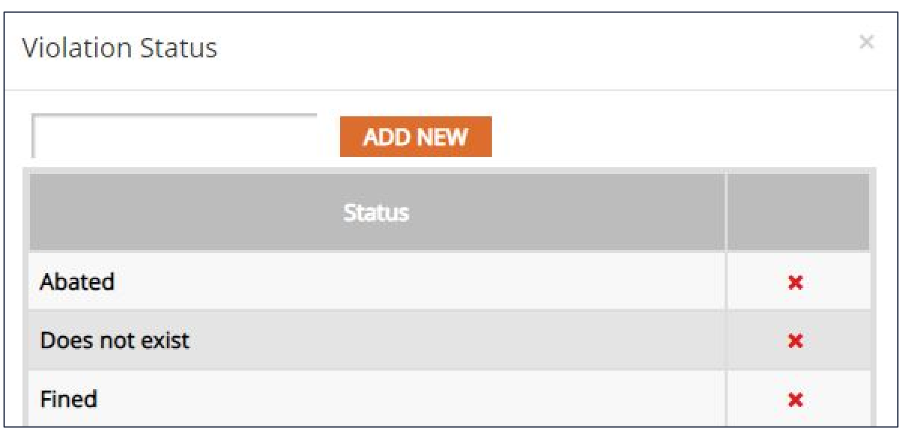


2. Enter the information for the new violation.
3. Click **Add**.

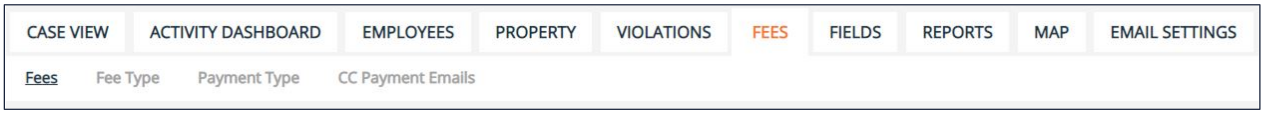
Adding Violation Statuses

1. Click the **Violation Status** button in the sub-menu.

2. Enter the name of the new Violation Status and click **Add New**.
3. Click on an existing Violation Status to edit or click the red X at the end of the status' row to delete.

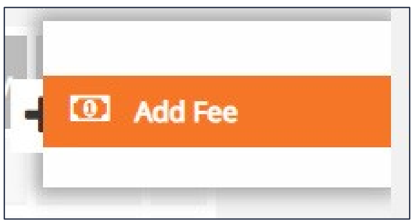


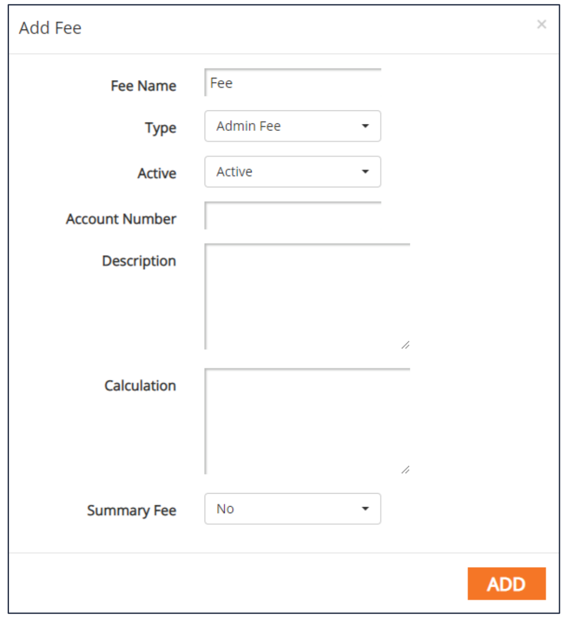
Fees



Adding a Fee

1. Click the **Add Fee** button within the side menu on the right side of the screen.
2. Enter the fee name and information.
3. Click **Add**.





If you are interested in having iWorQ upload your fee schedule call 888.655.1259.

Fee Formulas

Fees can use data as part of the calculation. For the data to function properly in the formula:

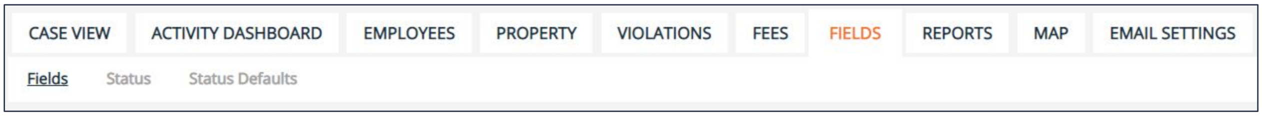
- Case data must be enclosed in brackets.
- Case data must be named exactly as it appears on the case.
- Formulas are case sensitive.

For example, to create a fee of $2 for every square foot of uncontained garbage on a property where the case field for square feet is named "Sq Feet". The formula would be:

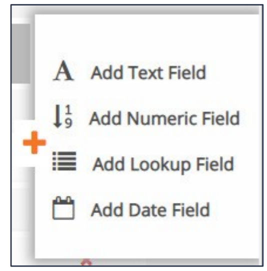
2*[Sq Feet]

If you need assistance, please call Technical Support at 888.655.1259.

Customizing Data Fields

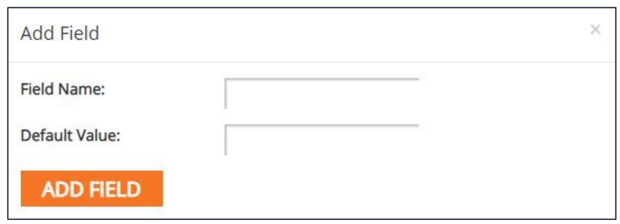


Adding Fields



In the Fields tab, the side menu on the right-hand side of the screen contains four options to add a new field: Text, Numeric, Lookup, and Date.

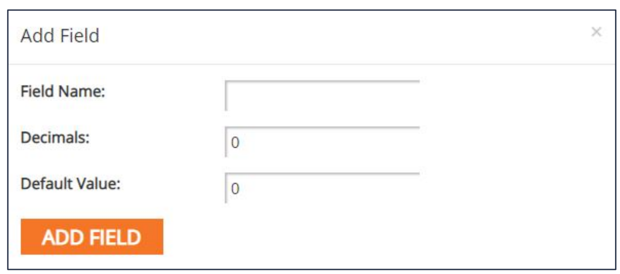
Text Fields



The Text Field accepts text, symbols, and numbers.

1. Click **Add Text Field**.
2. Enter in the Field Name and a default value to display upon creation of a new case.

Numeric Fields



The Numeric Field accepts numbers and decimals.

1. Click **Add Numeric Field**.
2. Enter in the Field Name, the number of decimal places to be displayed, and a default value to display upon creation of a new case.

Date Fields

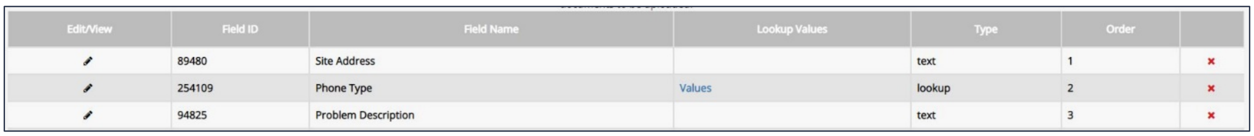
The Date Field accepts numbers formatted as dates.

1. Click **Add Date Field**.
2. Enter in the Field Name and enter a default number of days away from creation date of the case to display.

Lookup Fields

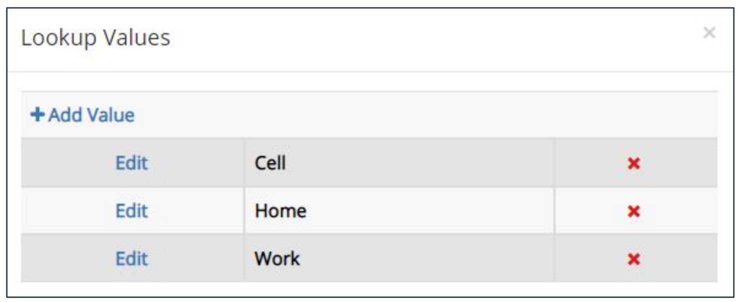
The Lookup Field creates a drop-down menu box.

1. Click **Add Lookup Field**.
2. Enter in the Field Name and click **Add Field**.
3. To add options in the drop-down menu, click on the blue **Values** button in the new field's row in the table.



Edit/View	Field ID	Field Name	Lookup Values	Type	Order	
	89480	Site Address		text	1	×
	254109	Phone Type	Values	lookup	2	×
	94825	Problem Description		text	3	×

4. Click **Add Value**.
5. Enter in a value and click **Add**.
6. To edit an existing value, click the blue Edit button in the value's row. To delete an existing value, click the red X at the end of a value's row.



Deleting Fields

To delete a field, click the red X at the end of a field's row and click Yes to delete the field. Fields cannot be deleted if information is associated with the field.

Reordering Fields

To reorder fields, click and drag fields within the table into the desired order. Changes to the order of fields are automatically saved.

Creating Reports

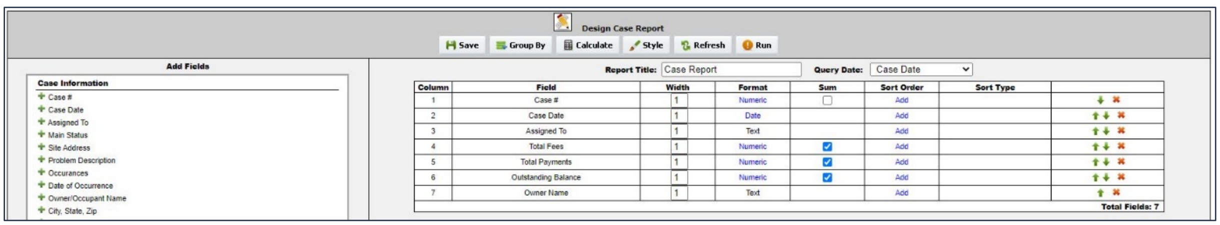
Building a Report

1. In the Reports tab, choose from the list of options which report to run. Click the blue **Build** button at the end of the row of the report.

Case Reports		
Report Name	Report Description	
Property Report	List of Properties	Build
Case Report	General Case Report	Build
Case Detail Report	General Case Report with additional information on activities, notes, letters, and files.	Build
Case Fee Report	Case Fee Report	Build
Case Payment Report	Case Payment Report	Build
Case Summary 1	Summarizes cases issued by: Current Month, Month Last Year, Current Year to Date, and Last Year To Date	Build

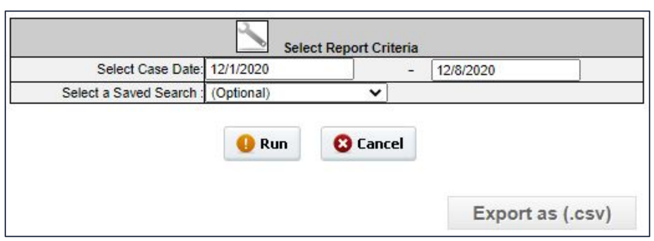
Activities Reports		
Report Name	Report Description	
Activity Summary	Summarizes cases by Activity Name and Lookup Field	Build
Activity Summary By Month	Summarizes cases by Activity Name and Month	Build

2. Select which data fields to display in the report. Reorder the fields into the desired order by clicking the up and down arrows for each field. Sorting and grouping rules are also available. Once finished, click the **Run** button.

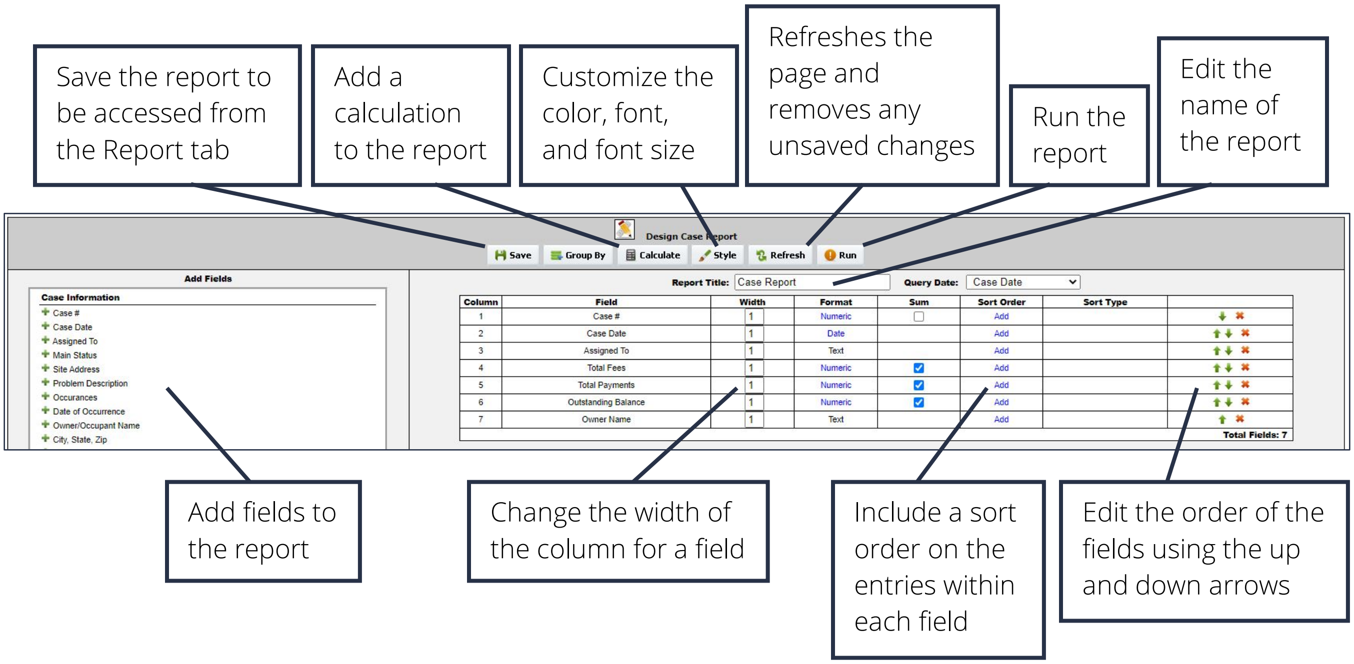


3. Select the data range for the report. Use a saved search to further narrow results, if desired. Once the necessary criteria has been selected, click Run to view or print the report, cancel to return and further build the report, or **Export as (.csv)** to download the data in a spreadsheet.

Please contact iWorQ at 888.655.1259 for any questions on running reports.

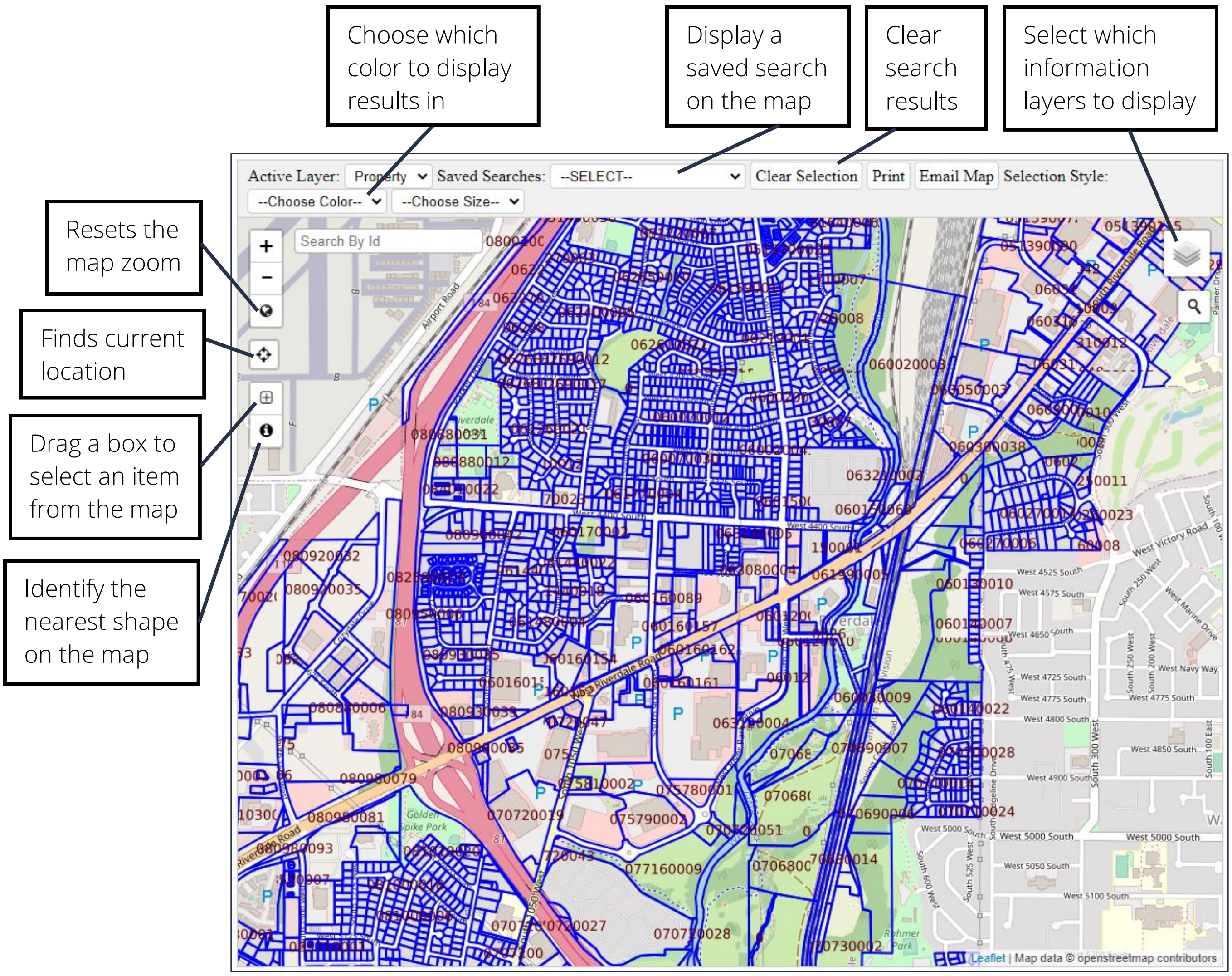


The Report Interface



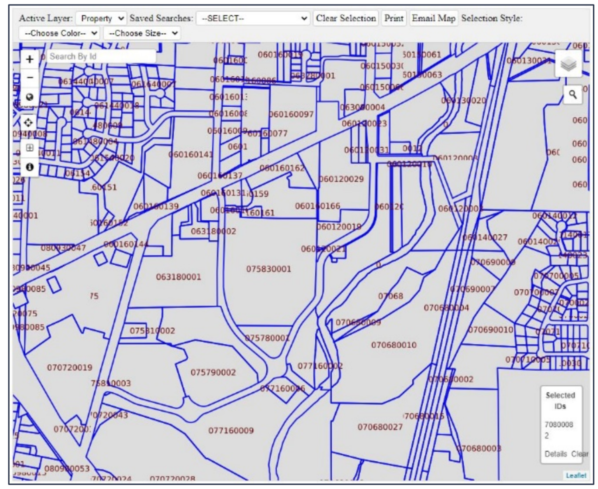
Using the Map

The Map Interface



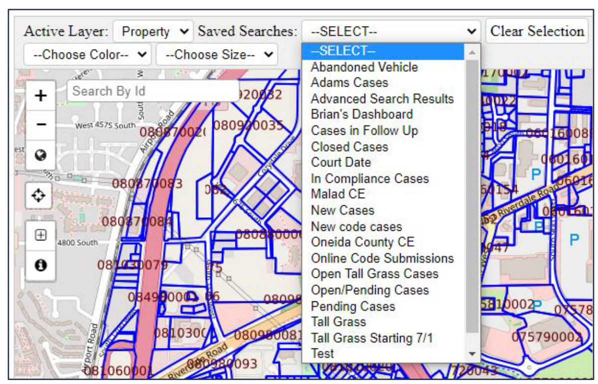
Changing the Map View

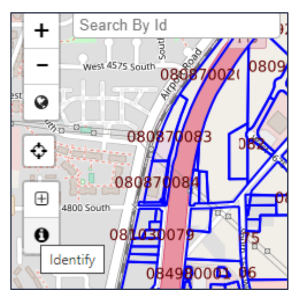
1. To change the background layer, click on the layers button in the top right-hand corner of the window.
2. Select which option to display as the background map layer.



Viewing Saved Searches

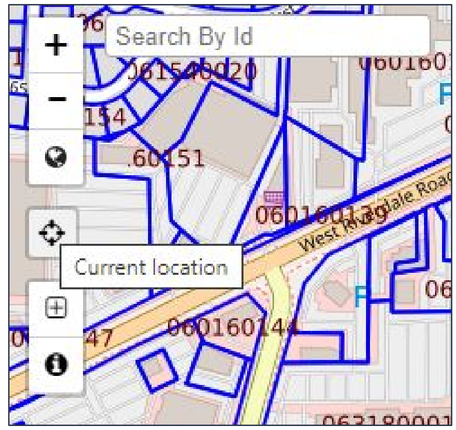
1. To display saved search data, select the saved search from the Saved Searches drop-down menu at the top of the window.
2. Results from the saved search will be highlighted on the map.
3. To view the information of a property, click the identify button and click on a highlighted shape.



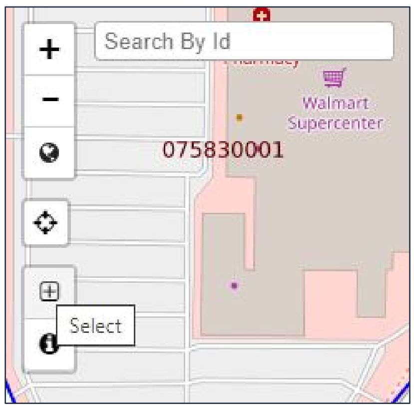


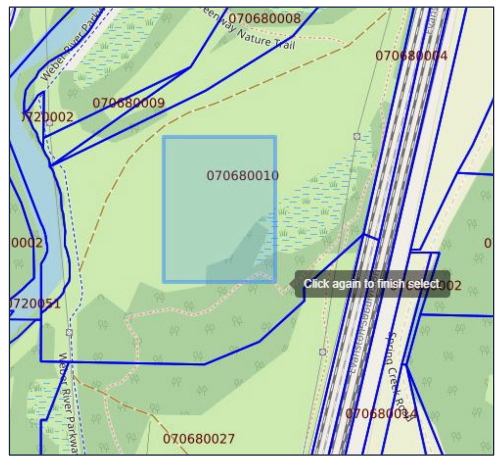
Creating a Case in the Field

1. To create a new case while on site, use the current location option to find your location on the map.



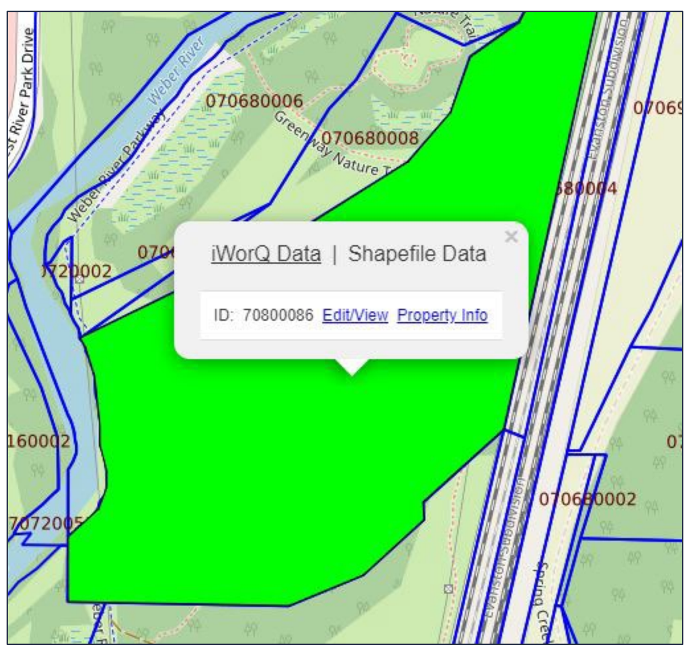
2. Click on the Select option and place your cursor in the top corner of a property and drag a box within the parcel boundaries to select a location.





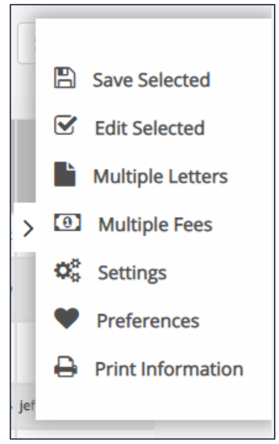
3. Click on the property info link to open the property information.

4. In the new window, create a case by clicking the Code Enforcement button on the right-hand side of the window.



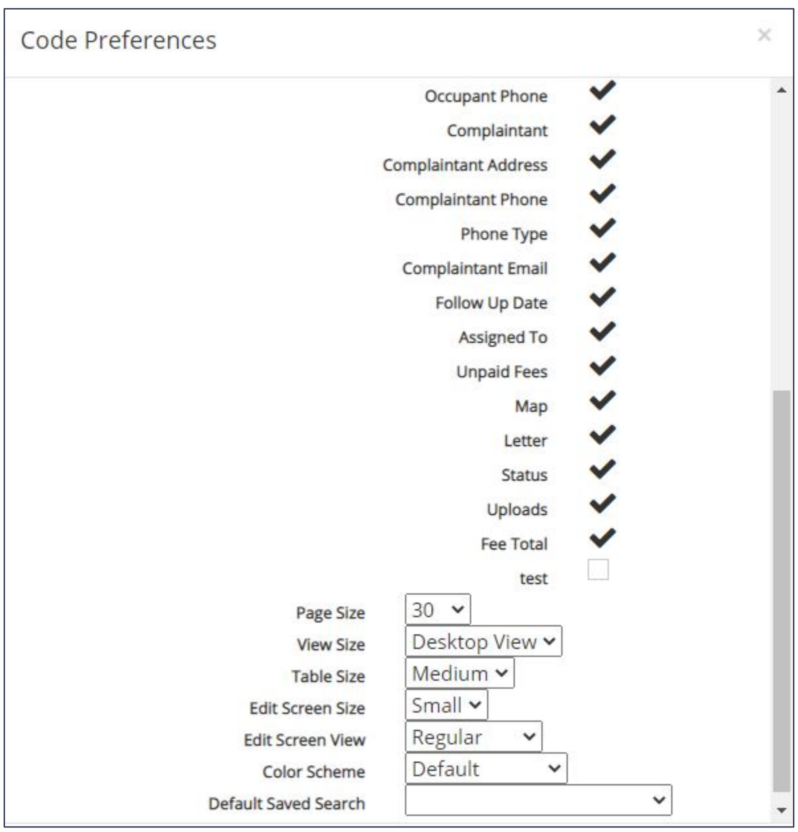
Dashboard Preferences

Setting Preferences



1. To customize the display of the Code Enforcement application, select the **Preferences** button within the side menu.

2. In the Code Preferences window, select which fields to display in the Case View table (this does not remove a field from the application and fields can still be viewed in the Case Information window if unchecked in the Preferences window). Select the number of lines displayed on each page as well as the size the information is displayed at.



Dashboard Overview

Search for cases by specific search parameters

Open a previously saved advanced search

Create a new case either from scratch or from a saved template

View cases by a specific time frame or through a previously saved advanced search

Click on the row of a case to open the Case Information window

Save or edit selected case, add multiple letters or fees, edit preferences, and print information