

Code Enforcement

Sewer

Citizen Engagement

FEMA Reporting

The logo for iWorQ is displayed in a grey rounded rectangle. The text 'iWor' is in a dark blue, bold, sans-serif font. The letter 'Q' is white with a thick orange outline. The background of the page features various grey icons: a road, a hard hat, a water drop, a classical building, a truck, a stop sign, and a clipboard.

iWorQ

Business Licenses

Stormwater

Processing

Permitting

Fleet Management

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	2
Adding a new case	
The Code Enforcement Interface	
Advanced and Saved Searches	
Adding Data	6
Activity Dashboard	
Employee Information	
Property Information	
Violations	
Fees	
Customizing Data Fields	12
Adding, editing, deleting, and reordering fields	
Reports.....	14
Building, designing, and exporting reports	
The Report Interface	
Using the Map	16
The Map Interface	
Changing the Map View	
Viewing and Editing Information from the Map	
View Saved Searches on the Map	
Dashboard Preferences	19
Dashboard Overview.....	20



Creating and Managing Cases

CASE VIEW	ACTIVITY DASHBOARD	EMPLOYEES	PROPERTY	VIOLATIONS	FEEES	FIELDS	REPORTS	MAP	EMAIL SETTINGS	GUEST MAP
<u>Main</u>	Advanced Search	Open Saved Search	New Case	Case Templates						

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.

CREATE CASE CREATE

Case Date:	<input type="text" value="11/10/20"/>	Complainant Phone:	<input type="text"/>
Site Address:	<input type="text"/>	Complainant Email:	<input type="text"/>
Problem Description:	<input type="text"/>	Phone Type:	-- ▾
Occurrences:	<input type="text" value="0"/>	Follow Up Date:	<input type="text" value="11/20/2020"/>
Date of Occurrence:	<input type="text"/>	test:	-- ▾
Owner/Occupant Name:	<input type="text"/>	Status:	Nothing selected ▾
City, State, Zip:	<input type="text"/>	Assigned To:	-- ▾
Occupant Phone:	<input type="text"/>		
Complainant:	<input type="text"/>		
Complainant Address:	<input type="text"/>		

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.

The screenshot shows a web interface for editing case information. The main area is titled 'CASE' and contains a 'STATUS | HISTORY' section with a dropdown menu currently set to 'Nothing selected'. Below this, the case name 'Daniel Hansen' and date '12/04/2020' are displayed. The main form is divided into two columns of input fields:

Case #:	70800088	Complainant:	<input type="text"/>
Case Date:	12/04/20	Complainant Address:	<input type="text"/>
Site Address:	<input type="text"/>	Complainant Phone:	<input type="text"/>
Problem Description:	<input type="text"/>	Phone Type:	--
Occurrences:	0	Complainant Email:	<input type="text"/>
Date of Occurrence:	<input type="text"/>	Follow Up Date:	12/14/2020
Owner/Occupant Name:	<input type="text"/>	test:	--
City, State, Zip:	<input type="text"/>	Assigned To:	--
Occupant Phone:	<input type="text"/>		

On the right side, there is a sidebar with a menu icon and a list of actions:

- Copy Case
- Save As Template
- Email Case
- Print Case
- Print Case History
- Apply Template
- Add Letter
- Notes
- Property
- Add Violation
- Add Activity
- Add Fees
- Add Payment
- Add CC Payment
- Upload File
- Map

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

The Code Enforcement Interface

The screenshot shows the 'CASE' interface with a sidebar menu and a main form area. The sidebar menu includes: Copy Case, Save As Template, Email Case, Print Case, Print Case History, Apply Template, Add Letter, Notes, Property, Add Violation, Add Activity, Add Fees, Add Payment, Add CC Payment, Upload File, and Map. The main form area contains fields for Case #, Case Date, Site Address, Problem Description, Occurrences, Date of Occurrence, Owner/Occupant Name, City, State, Zip, Occupant Phone, Complainant, Complainant Address, Complainant Phone, Phone Type, Complainant Email, Follow Up Date, test, and Assigned To.

Callout boxes provide the following descriptions for the interface elements:

- 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



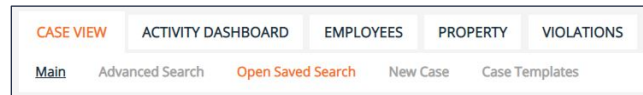
Using the Advanced Search

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.

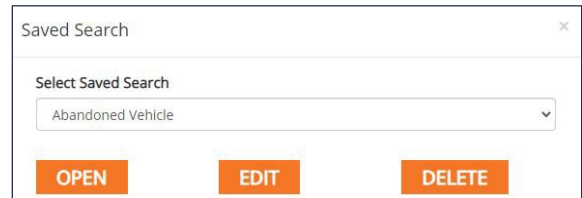


Saved Searches

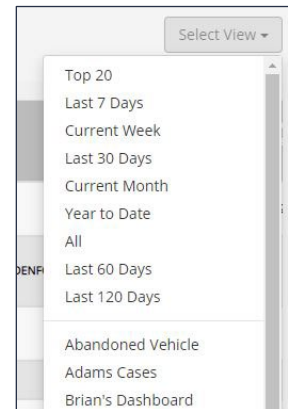
There are two methods to open a saved search.



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.



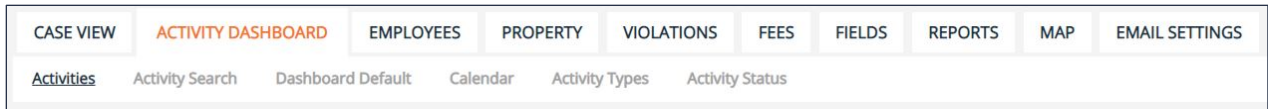
Saved Searches can also be used when creating reports.



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

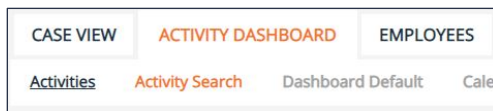
Adding Data

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.

A screenshot of the 'Activity Search' window. It contains the following fields: Case # (text input), Activity Date (From/To date pickers), Activity Type (dropdown menu with 'Nothing selected'), Scheduled Date (From/To date pickers), Completed Date (From/To date pickers), Description (text input), Activity Status (dropdown menu with 'Nothing selected'), Assigned To (dropdown menu with 'Nothing selected'), Hours (text input), Search Activities by Property (checkbox), Owner Name (text input), Owner Address (text input), and Property Address (text input). A red 'SEARCH' button is located at the bottom right.

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.



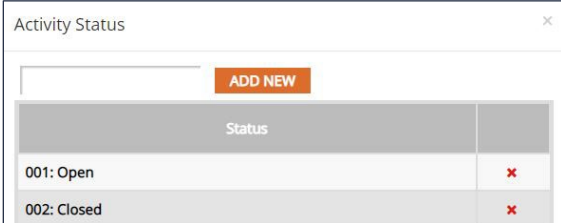
A screenshot of the 'Activity Types' window showing a table with two rows. The first row is '1st investigation' with description 'first property visit'. The second row is 'Attempt Contact' with description 'Try to contact tenant'. Each row has a red 'X' icon at the end for deletion. There is an '+ Add Type' button at the top left.

Activity Type	Description	
1st investigation	first property visit	X
Attempt Contact	Try to contact tenant	X

A screenshot of the 'Activity Types' form. It contains two text input fields: 'Activity Type' and 'Description'. A red 'ADD NEW' button is located at the bottom.

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.

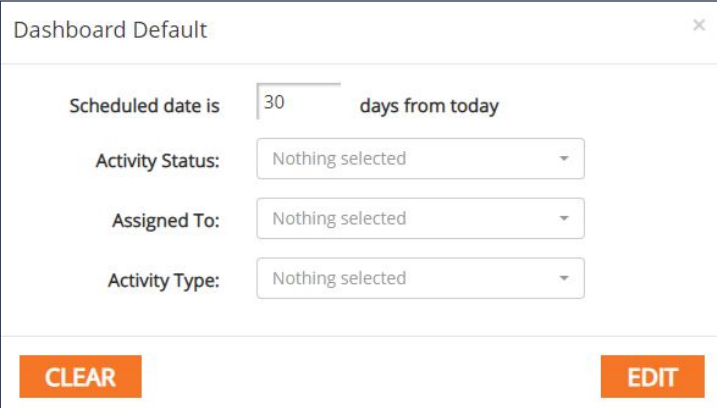
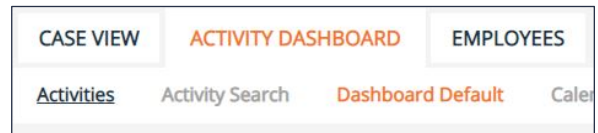


Status	
001: Open	X
002: Closed	X

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**.



Scheduled date is days from today

Activity Status:

Assigned To:

Activity Type:

CLEAR **EDIT**

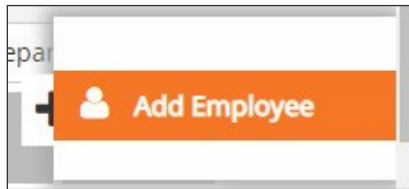
Employees

CASE VIEW ACTIVITY DASHBOARD **EMPLOYEES** PROPERTY VIOLATIONS FEES FIELDS REPORTS MAP EMAIL SETTINGS

Employee Department

Adding an Employee

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



Add Employee

Employee Name:

Email:

Department:

Title:

Phone:

Active:

ADD EMPLOYEE

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.

CASE VIEW ACTIVITY DASHBOARD **EMPLOYEES**

Employee **Department**

Departments

[+Add Department](#)

	Animal Control	
	Building Inspections	
	CAMA	

Departments

Department Name:

Type:

CANCEL **ADD**

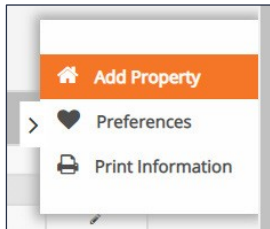
6. To delete an existing department, click on the red X at the end of the department's row in the table. Departments cannot be deleted if information is associated with the department.

Property



Adding Property

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

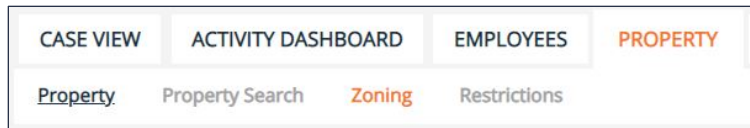


2. Fill in the property details.
3. Click **Add**.

Parcel:	<input type="text"/>	Zoning:	<input type="text"/>
Address:	<input type="text"/>	Owner:	<input type="text"/>
City:	<input type="text"/>	Owner Address:	<input type="text"/>
State:	<input type="text"/>	Owner City:	<input type="text"/>
Zip:	<input type="text"/>	Owner State:	<input type="text"/>
Legal:	<input type="text"/>	Owner Zip:	<input type="text"/>
Subdivision:	<input type="text"/>	Owner Phone:	<input type="text"/>
Lot:	<input type="text"/>	Owner Email:	<input type="text"/>
Block:	<input type="text"/>		

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.



Zoning	
-	X
A1 - Single Family Residence *	X
A2 - Mobile Home on Real Estate *	X
A4 - Other Storage/ Garage/etc	X

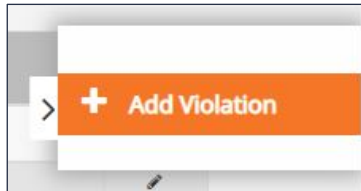
We can upload your property information into your application. Call Technical Support at 888.655.1259.

Violations



Adding Violations

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



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

The 'Add Violation' form contains the following fields: 'Violation Name' (text input), 'Violation Description' (text area), and 'Active:' (dropdown menu with 'Active' selected). An orange 'ADD' button is located at the bottom right of the form.

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.

The 'Violation Status' form has a text input field at the top with an orange 'ADD NEW' button to its right. Below this is a table with three rows of existing violation statuses.

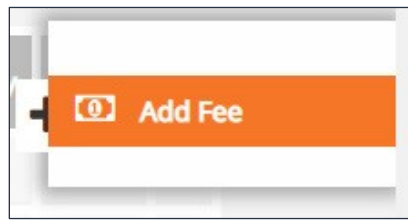
Status	
Abated	X
Does not exist	X
Fined	X

Fees

CASE VIEW	ACTIVITY DASHBOARD	EMPLOYEES	PROPERTY	VIOLATIONS	FEES	FIELDS	REPORTS	MAP	EMAIL SETTINGS
Fees	Fee Type	Payment Type	CC Payment Emails						

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**.

A screenshot of the 'Add Fee' form. The form has a title bar 'Add Fee' with a close button. It contains several fields: 'Fee Name' (text input with 'Fee'), 'Type' (dropdown menu with 'Admin Fee'), 'Active' (dropdown menu with 'Active'), 'Account Number' (text input), 'Description' (text area), 'Calculation' (text area), and 'Summary Fee' (dropdown menu with 'No'). An orange 'ADD' button is located at the bottom right of the form.

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]

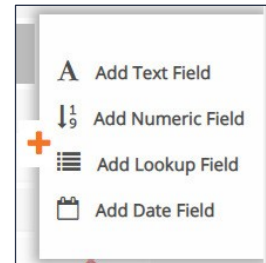
If you need assistance, please call Technical Support at 888.655.1259.

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.

Add Field

Field Name:

Default Value:

ADD FIELD

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.

Add Field

Field Name:

Decimals:

Default Value:

ADD FIELD

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.

Add Field

Field Name:

Default Days From Creation Date:

ADD FIELD

Lookup Fields

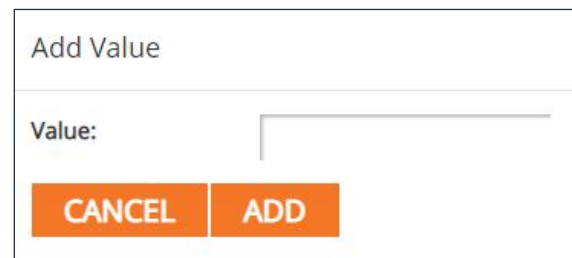
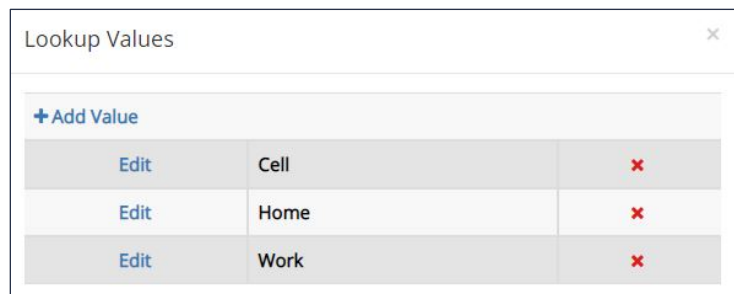
The Lookup Field creates a drop-down menu box.



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.

Design Case Report							
Report Title: Case Report							
Column	Field	Width	Format	Sum	Sort Order	Sort Type	
1	Case #	1	Numeric	<input type="checkbox"/>	Add		↑ ↓ ✕
2	Case Date	1	Date	<input type="checkbox"/>	Add		↑ ↓ ✕
3	Assigned To	1	Text	<input type="checkbox"/>	Add		↑ ↓ ✕
4	Total Fees	1	Numeric	<input checked="" type="checkbox"/>	Add		↑ ↓ ✕
5	Total Payments	1	Numeric	<input checked="" type="checkbox"/>	Add		↑ ↓ ✕
6	Outstanding Balance	1	Numeric	<input checked="" type="checkbox"/>	Add		↑ ↓ ✕
7	Owner Name	1	Text	<input type="checkbox"/>	Add		↑ ↓ ✕
							Total Fields: 7

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.

Select Report Criteria	
Select Case Date:	12/1/2020 - 12/8/2020
Select a Saved Search:	(Optional)
<input type="button" value="Run"/> <input type="button" value="Cancel"/>	
<input type="button" value="Export as (.csv)"/>	

The Report Interface

The screenshot shows the 'Design Case Report' interface. At the top, a toolbar contains buttons for Save, Group By, Calculate, Style, Refresh, and Run. Below the toolbar, the interface is divided into two main sections: 'Add Fields' on the left and a report preview table on the right. The 'Add Fields' section lists various case-related fields. The report preview table has columns for Column, Field, Width, Format, Sum, Sort Order, and Sort Type. Callout boxes point to specific features: 'Save' (Save the report to be accessed from the Report tab), 'Calculate' (Add a calculation to the report), 'Style' (Customize the color, font, and font size), 'Refresh' (Refreshes the page and removes any unsaved changes), 'Run' (Run the report), 'Report Title' (Edit the name of the report), 'Add Fields' (Add fields to the report), 'Width' (Change the width of the column for a field), 'Sort Order' (Include a sort order on the entries within each field), and 'Sort Type' (Edit the order of the fields using the up and down arrows).

Save the report to be accessed from the Report tab

Add a calculation to the report

Customize the color, font, and font size

Refreshes the page and removes any unsaved changes

Run the report

Edit the name of the report

Add fields to the report

Change the width of the column for a field

Include a sort order on the entries within each field

Edit the order of the fields using the up and down arrows

Column	Field	Width	Format	Sum	Sort Order	Sort Type
1	Case #	1	Numeric	<input type="checkbox"/>	Add	↑ ↓ ✖
2	Case Date	1	Date		Add	↑ ↓ ✖
3	Assigned To	1	Text		Add	↑ ↓ ✖
4	Total Fees	1	Numeric	<input checked="" type="checkbox"/>	Add	↑ ↓ ✖
5	Total Payments	1	Numeric	<input checked="" type="checkbox"/>	Add	↑ ↓ ✖
6	Outstanding Balance	1	Numeric	<input checked="" type="checkbox"/>	Add	↑ ↓ ✖
7	Owner Name	1	Text		Add	↑ ↓ ✖

Using the Map

The Map Interface

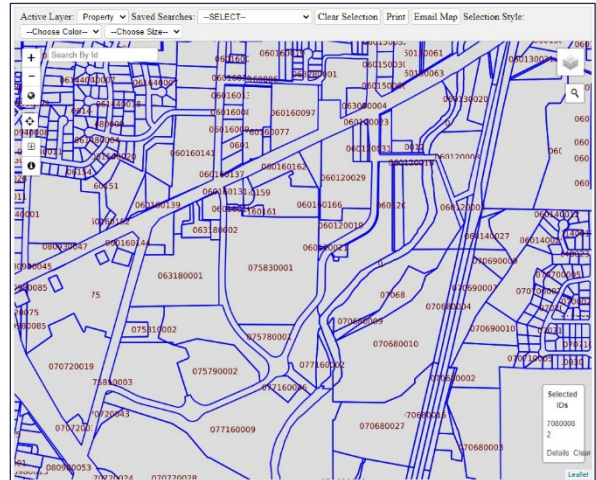
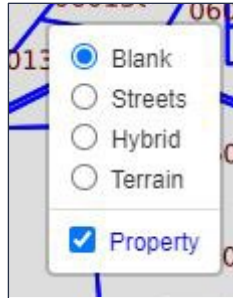
The image shows a screenshot of a web-based map application interface. The map displays a residential area with numerous property boundaries and street names. Several callout boxes with arrows point to specific UI elements:

- Choose which color to display results in:** Points to the "--Choose Color--" dropdown menu.
- Display a saved search on the map:** Points to the "Saved Searches: --SELECT--" dropdown menu.
- Clear search results:** Points to the "Clear Selection" button.
- Select which information layers to display:** Points to the "Selection Style:" dropdown menu.
- Resets the map zoom:** Points to the zoom reset button (a square with a diagonal line).
- Finds current location:** Points to the location finding button (a crosshair).
- Drag a box to select an item from the map:** Points to the information icon (an 'i' in a square).
- Identify the nearest shape on the map:** Points to the information icon (an 'i' in a square).

At the top of the interface, there are controls for "Active Layer: Property", "Saved Searches: --SELECT--", "Clear Selection", "Print", "Email Map", and "Selection Style:". Below these are two dropdowns: "--Choose Color--" and "--Choose Size--". A search bar labeled "Search By Id" is also visible.

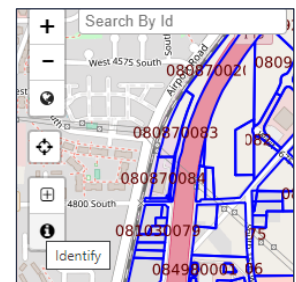
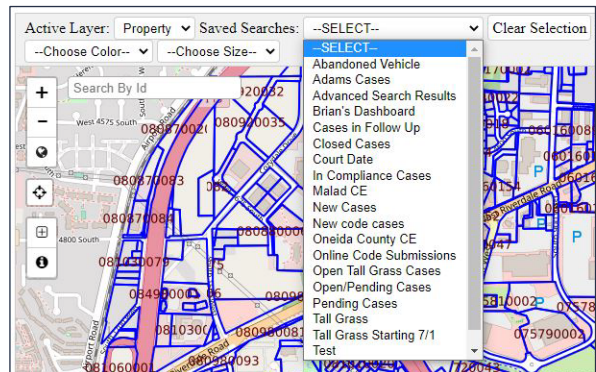
Changing the Map View

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.



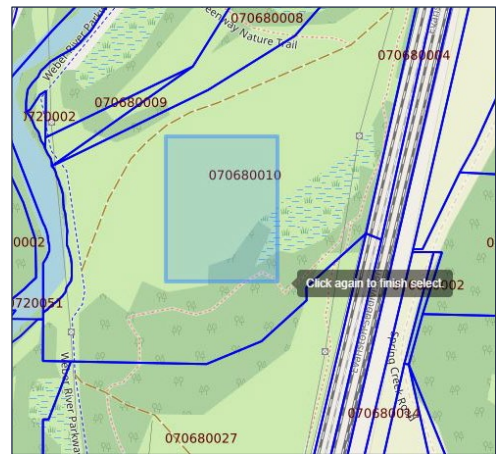
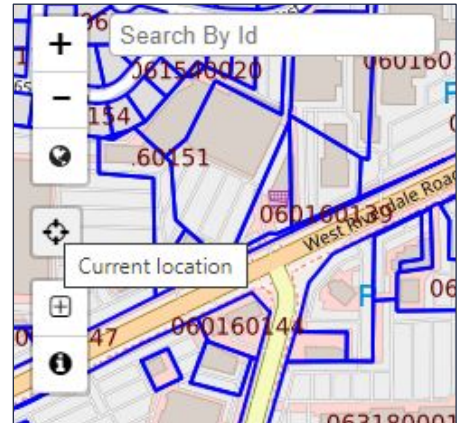
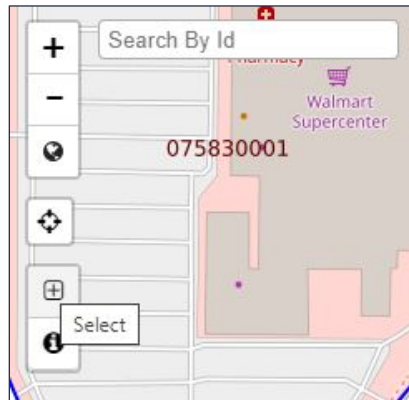
Viewing Saved Searches

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.



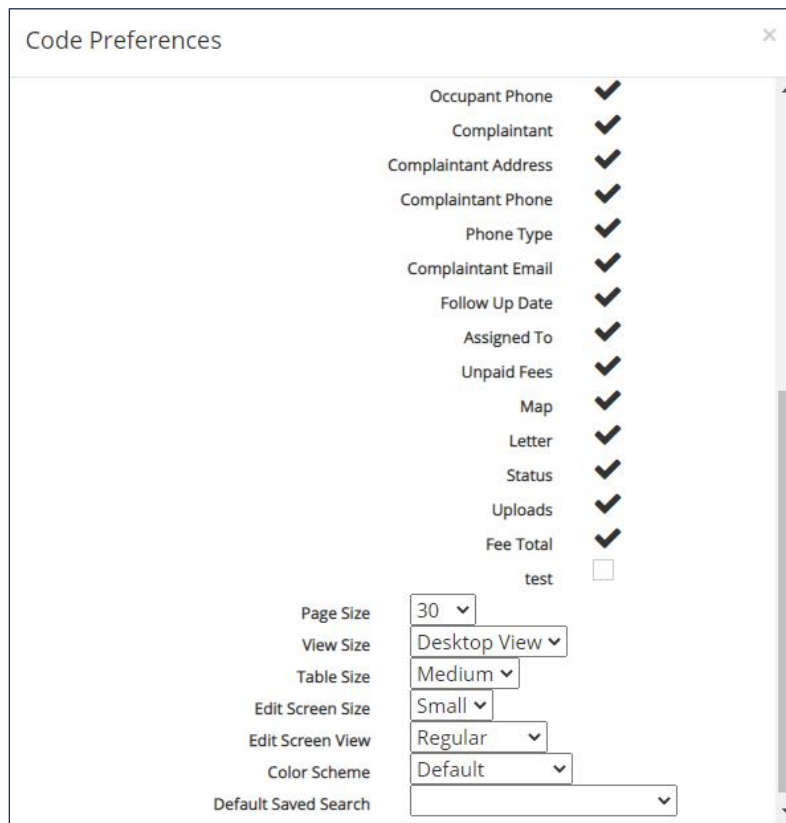
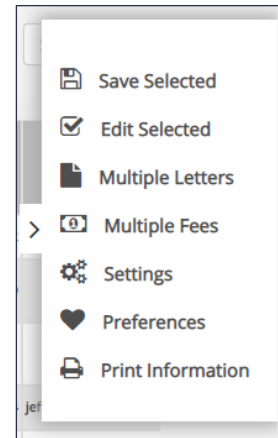
3. Click on the property info link to open the property information.
4. In the new window, create a case by clicking the Code Enforcement button on the right-hand side of the window.



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

[CASE VIEW](#)
[ACTIVITY DASHBOARD](#)
[EMPLOYEES](#)
[PROPERTY](#)
[VIOLATIONS](#)
[FEES](#)
[FIELDS](#)
[REPORTS](#)
[MAP](#)
[EMAIL SETTINGS](#)

[Main](#)
[Advanced Search](#)
[Open Saved Search](#)
[New Case](#)
[Case Templates](#)

ALL RECORDS Select View ▾

Selected	Case Number	Case Date	Parcel	Property Address	Owner	Good Landlord	Site Address	Tenant	Problem Description	Floodplain	Occurrences	Date of Occurrence	Email	Owner/Occupant Name	City, State, Zip	Occupant Phone	Complainant	Complainant Address	Complainant Phone	Phone Type	Complainant Email	Follow Up Due	
<input type="checkbox"/>	1935	10/08/2020	051440001	6500 W BROOKSHIRE DR	Ty Pebley		6500 W Brookshire Dr		Tall Grass		0	10/08/2020		Ty Pebley	Riverdale, UT, 84405							10/18/20	
<input type="checkbox"/>	1924	06/30/2020	060120025	129 N 1000 W	Sam Smith		580 BROAD		weeds high grass		2	06/30/2020		PIZZA HUT/D&G ASSOCIATES LLC	4464 SPRING HILL DR SCHNECKSVILLE PA 18078-2543	UNK	SELF	134 S MAIN ST NAZARETH 18064	484.759.2547		CODENFORCE@NAZARETHBROUIGHPA.GOV		
<input type="checkbox"/>	1890	03/11/2020	365125899	1250 Paramount Street	Ethan Hunt		123 East Paramount Street		Tall Grass		0	06/18/2020		Ethan Hunt	Springfield, IL								
<input type="checkbox"/>	1908	06/15/2020	05-093-0101	1125 W 400 N	IWORQ LLC		112		Tall Grass		2	06/18/2020		Aluix	Logan	885							
<input type="checkbox"/>	1913	06/17/2020	060160002	123 Center Street	Sally Jamison	Yes	123 South East Street	Good	Tall Grass and weeds, over 12 inches		1	06/18/2020		Nick Smith	Highland Beach, FL								

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