



iWorQ

License Management

Quick Start Guide

Welcome to License Management

iWorQ is designed so you can configure the software to meet your specific license management needs. This guide was created to help you start performing common tasks in the License Management application through step-by-step explanations and screen shots.

For additional help or questions, please call iWorQ’s technical support team at **888.655.1259**.

Technical support and training are always free!

Table of Contents

- Creating and Managing Entities.....2
 - Creating a New Entity
 - Modifying an Existing Entity
 - The Entity Information Window
- Advanced Searches.....5
- Adding Data.....6
 - Inspection Dashboard
 - Licenses
 - Employees
 - Property
 - Fees
- Customizing Data Fields.....11
 - Adding, Deleting, and Reordering Fields
- Creating Reports.....13
- Using the Map.....15
 - Changing the background layer
 - Viewing a saved search
 - Create an entity in the field
- Dashboard Preferences.....18
- Dashboard Overview.....19



Creating and Managing Entities

ENTITY VIEW	INSPECTION DASHBOARD	LICENSE DASHBOARD	LICENSES	EMPLOYEE	PROPERTY	FEES	FIELDS	REPORTS	MAP	EMAIL SETTINGS
Main	Advanced Search	Open Saved Search	Entity Templates	New Entity						

Creating a New Entity

1. Click the **New Entity** button in the sub-menu under Entity View.

CREATE ENTITY

CREATE

Entity Date:	<input type="text" value="12/22/20"/>	Email:	<input type="text"/>
Establishment Type:	<input type="text" value="--"/>	Days and Hours of Operation:	<input type="text"/>
Establishment Name:	<input type="text"/>	Description of Business:	<input type="text"/>
Physical Address:	<input type="text"/>	Original Date:	<input type="text"/>
Mailing Address:	<input type="text"/>	Business Closed Date:	<input type="text"/>
Number of Employees:	<input type="text"/>	Contractor Name:	<input type="text"/>
Owner Name:	<input type="text"/>	Contractor Email:	<input type="text"/>
Phone Number:	<input type="text"/>	Status:	<input type="text" value="Renewal"/>

2. Fill out the entity information. This can be changed later if necessary.
3. Click the **Create** button.

To add additional fields or items to drop-down menus, see page 11.

Modifying an Existing Entity

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

ENTITY HISTORY SAVE >

STATUS | HISTORY
Renewal
Daniel Hansen
12/22/2020

Entity #: 299 Phone Number:

Entity Date: 12/22/20 Email:

Establishment Type: -- Days and Hours of Operation:

Establishment Name: Description of Business:

Physical Address: Original Date:

Mailing Address: Business Closed Date:

Number of Employees: Contractor Name:

Owner Name: Contractor Email:

- Copy Entity
- Save As Template
- Email Entity
- Print Entity
- Add License
- Add Contact
- Add Inspection
- Apply Template
- Add Letter
- Notes
- Property
- Add Fees
- Add Payment
- Add CC Payment
- Upload File
- Map

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

The Entity Information Window

The screenshot shows the 'ENTITY' information window. At the top, there are icons for settings, history, and save. Below this is a 'STATUS | HISTORY' section with a dropdown menu set to 'Renewal' and the name 'Daniel Hansen' and date '12/22/2020'. The main area contains various input fields for entity details such as Entity #, Date, Address, and Contractor information. On the right side, there is a vertical menu of actions: Copy Entity, Save As Template, Email Entity, Print Entity, Add License, Add Contact, Add Inspection, Apply Template, Add Letter, Notes, Property, Add Fees, Add Payment, Add CC Payment, Upload File, and Map. Each action is accompanied by a small icon. Callout boxes provide descriptions for these actions and other window features.

Opens the quickfind menu for the entity

Saves changes to the entity

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

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

Entity #: 299

Entity Date: 12/22/20

Establishment Type: --

Establishment Name:

Physical Address:

Mailing Address:

Number of Employees:

Owner Name:

Phone Number:

Email:

Days and Hours of Operation:

Description of Business:

Original Date:

Business Closed Date:

Contractor Name:

Contractor Email:

Copy Entity

Save As Template

Email Entity

Print Entity

Add License

Add Contact

Add Inspection

Apply Template

Add Letter

Notes

Property

Add Fees

Add Payment

Add CC Payment

Upload File

Map

Emails the entity to employees or contractors

Prints any recorded data on the entity

Adds a license to the entity

Adds a point of contact to the entity

Schedules an inspection for the entity

Adds a letter to the entity

Adds detailed notes to the entity

Adds a property to the entity

Adds fees to the entity

Add payments for the entity

Add credit card payments to the entity

Open the map

Upload files to the entity

Pop-up blockers must be disabled for iWorQ for many of these features to function.

Advanced Search



Using the Advanced Search

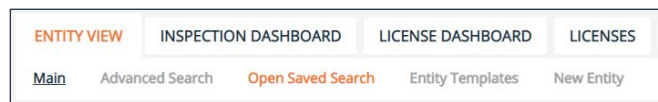
1. Click the **Advanced Search** button in the sub-menu.
2. The Advanced Search allows the user to search by any fields in the application. Enter the desired search parameters and click **Search**.
3. Searches can be saved for later ease of access. To save a search, click the **Save Search** button before clicking Search.

The 'ADVANCED SEARCH' form contains the following fields: Entity # (text input), Entity Date (date input), Establishment Type (dropdown menu with 'Nothing selected'), Establishment Name (text input), and Physical Address (text input). At the top right, there are buttons for 'SAVE SEARCH' and 'SEARCH'.

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**.

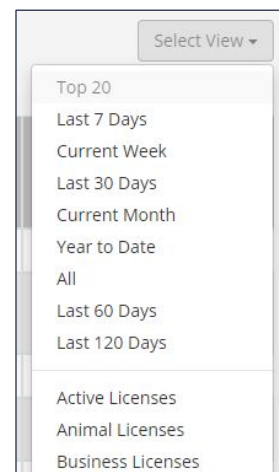


The 'Saved Search' dialog box features a dropdown menu labeled 'Select Saved Search' with 'Active Licenses' selected. Below the dropdown are three buttons: 'OPEN', 'EDIT', and 'DELETE'.

Or

1. Select the saved search from the **Select View** drop-down menu in the upper right-hand corner of the Entity 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

Inspection Dashboard

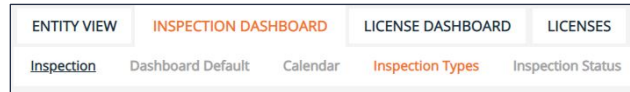


The Inspection Dashboard is for managing inspection types and statuses used when scheduling an inspection.

Inspectors are considered employees and are added to the database through the employees tab. See page 8 for managing employees.

Adding an Inspection Type

1. Click the **Inspection Types** button in the sub-menu.
2. Within the side menu on the right-hand side of the screen, click **Add Type**.
3. Enter in the inspection type title and a brief description.
4. Click **Add**.
5. To add inspection items, click the blue Items link in the inspection's row in the table.



Add Type ✕

Type

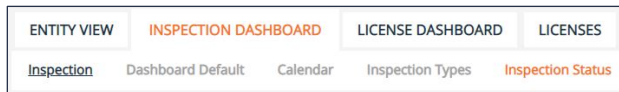
Description

CANCEL **ADD**

INSPECTION TYPES			
Inspection Type	Description	Items	
Alcohol Inspection	Any entity that has alcohol licenses must be inspected every 6 months	Items	✕
Backflow preventer		Items	✕
Fairborn Life Safety	Company-Level Life Safety Inspection	Items	✕

Adding an Inspection Status

1. Click the **Inspection Status** button in the sub-menu.
2. Enter in a new status into the textbox and click **Add New**.
3. To delete existing statuses, click the red X at the end of the status's row in the table.



Inspection Status ✕

ADD NEW

Status	
Assigned	✕
Completed	✕
First Reinspection	✕

Licenses

ENTITY VIEW	INSPECTION DASHBOARD	LICENSE DASHBOARD	LICENSES	EMPLOYEE	PROPERTY	FEES	FIELDS	REPORTS	MAP	EMAIL SETTINGS
Licenses										

Adding a License Type

1. To add a new license type, click the **Add Type** button within the side menu.
2. Enter the license information.
3. Click **Add**.
4. To assign fees to the license type, click the blue **Assign Fees** button in the row of the license in the table.

Add License Type ×

License Type:

Descriptions:

Valid For:

Units:

CANCEL
ADD

LICENSE TYPES					
License Type	Description	Valid	Valid Units		
1 fee		20	Days	Assign Fees	×
81B	HOME OFFICE	365	Days	Assign Fees	×
Alarm System License		1	Years	Assign Fees	×
Alcohol License		3	Years	Assign Fees	×

5. Select the fee to assign to the license from the drop-down menu. To add new fee types, see page 10.
6. Edit other fee information as necessary. Click **Assign Fee**.
7. Under the Assigned Fees table, click the red X at the end of a fee's row to unassign the fee from the license.
8. Click on a license's row in the table to edit or click on the red X at the end of the license's row to delete.

Assign Fees to Parking License ×

Select Fee:

Specify Effective Dates:

Fee Effective Start:

Units:

Fee Effective End:

Units:

Assigned Fees					
Fee Name	Effective Start	Units	Effective End	Units	
Admin Fee	Always Effective				×

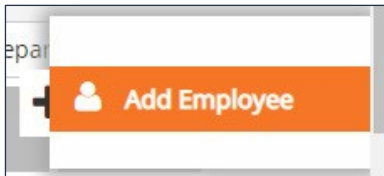
ASSIGN FEE

Employees



Adding an Employee

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

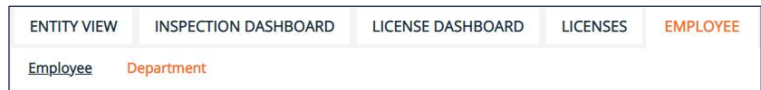


Employee Name	<input type="text" value="New Employee"/>
Email	<input type="text"/>
Department	<input type="text" value="City Hall"/>
Active:	<input type="text" value="Active"/>

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 License Management 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.

+ Add Department			
		City Hall	
		Code Enforcement	
		Engineering	

Department Name	<input type="text"/>
Type	<input type="text" value="This application only"/>

CANCEL **ADD**

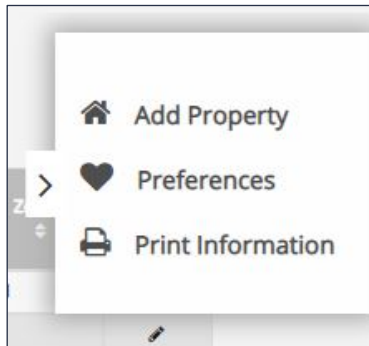
Property

ENTITY VIEW | INSPECTION DASHBOARD | LICENSE DASHBOARD | LICENSES | EMPLOYEE | **PROPERTY** | FEES | FIELDS | REPORTS | MAP | EMAIL SETTINGS

Property | Property Search | Zoning | Restrictions

Adding Property

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



ADD PROPERTY

ADD

Parcel: Block:

Address: Zoning:

City: Owner:

State: Owner Address:

Zip: Owner City:

Legal: Owner State:

Subdivision: Owner Zip:

Lot: Owner Phone:

Owner Email:

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

Adding Zoning

ENTITY VIEW | INSPECTION DASHBOARD | LICENSE DASHBOARD | LICENSES | EMPLOYEE | **PROPERTY** | FEES | FIELDS | REPORTS | MAP | EMAIL SETTINGS

Property | Property Search | **Zoning** | Restrictions

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

ADD NEW

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

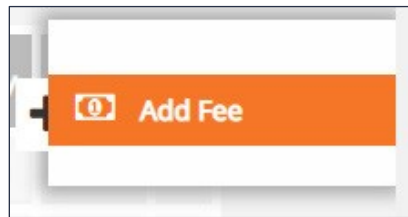
We can upload your property information into your application. Call Technical Support at 888.655.1259.

Fees

ENTITY VIEW	INSPECTION DASHBOARD	LICENSE DASHBOARD	LICENSES	EMPLOYEE	PROPERTY	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**.

Add Fee

Fee Name

Type

Active

Account Number

Description

Calculation

Summary Fee

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:

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

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

$$2*[\text{Sq Feet}]$$

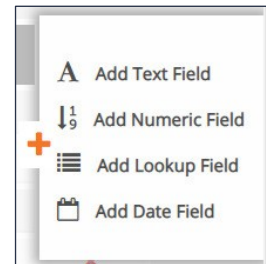
If you need assistance, please call Technical Support at 888.655.1259.

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 entity.

A dialog box titled 'Add Field' with a close button (X) in the top right corner. It contains two input fields: 'Field Name:' and 'Default Value:'. Below the fields is an orange button labeled '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 entity.

A dialog box titled 'Add Field' with a close button (X) in the top right corner. It contains three input fields: 'Field Name:', 'Decimals:' (with the value '0' entered), and 'Default Value:' (with the value '0' entered). Below the fields is an orange button labeled 'ADD FIELD'.

Date Fields

The Date Field accepts numbers formatted as dates.

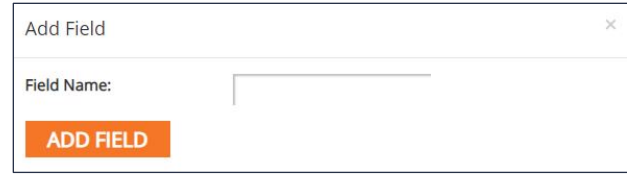
1. Click **Add Date Field**.
2. Enter in the Field Name and enter a default number of days away from creation date of the entity to display.

A dialog box titled 'Add Field' with a close button (X) in the top right corner. It contains two input fields: 'Field Name:' and 'Default Days From Creation Date:'. Below the fields is an orange button labeled '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	
	71545	Department	Values	lookup	1	
	83560	License Plate		text	2	

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.

NOTE: Fields cannot be deleted if data has been entered into 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

ENTITY VIEW	INSPECTION DASHBOARD	LICENSE DASHBOARD	LICENSES	EMPLOYEE	PROPERTY	FEES	FIELDS	REPORTS	MAP	EMAIL SETTINGS
Entity 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.

Entity Reports		
Report Name	Report Description	
Entity Report	Entity Report	Build
Entity Detail Report	Entity Report with additional information on inspections, licenses, notes, letters, and files.	Build
Entity License Report	Entity License Report	Build
Fee & Payment Reports		
Report Name	Report Description	
Unpaid Fee Report	Unpaid Fee Report	Build
Fee Summary Totals	Summarizes number of fees and total fee amounts	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 Entity Report							
<input type="button" value="Save"/> <input type="button" value="Group By"/> <input type="button" value="Calculate"/> <input type="button" value="Style"/> <input type="button" value="Refresh"/> <input type="button" value="Run"/>							
Add Fields		Report Title: Entity Report		Query Date: Entity Date			
Entity Information	Column	Field	Width	Format	Sum	Sort Order	Sort Type
Entity #	1	Entity #	1	Numeric	<input type="checkbox"/>	Add	↑ ↓ ✕
Entity Date	2	Entity Date	1	Date		Add	↑ ↓ ✕
Main Status	3	Main Status	1	Text		Add	↑ ↓ ✕
Establishment Type	4	Establishment Type	1	Text		Add	↑ ↓ ✕
Physical Address	5	Establishment Name	1	Text		Add	↑ ↓ ✕
Mailing Address	6	Physical Address	1	Text		Add	↑ ↓ ✕
Number of Employees	7	Total Fees	1	Numeric	<input checked="" type="checkbox"/>	Add	↑ ↓ ✕
Owner Name	8	Total Payments	1	Numeric	<input checked="" type="checkbox"/>	Add	↑ ↓ ✕
Phone Number							
Email							
							Total Fields: 8

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 Entity Date:	12/1/2020	- 12/30/2020
Select a Saved Search:	(Optional) ▼	
<input type="button" value="Run"/> <input type="button" value="Cancel"/>		
<input type="button" value="Export as (.csv)"/>		

The Reports Interface

The screenshot shows the 'Design Entity Report' interface. At the top, there is a toolbar with buttons for Save, Group By, Calculate, Style, Refresh, and Run. Below the toolbar is a 'Report Title' field set to 'Entity Report' and a 'Query Date' dropdown set to 'Entity Date'. The main area is divided into two panes: 'Add Fields' on the left and a report preview table on the right. The 'Add Fields' pane lists various entity fields. The report preview table has columns for Column, Field, Width, Format, Sum, Sort Order, and Sort Type. At the bottom right of the table, it says 'Total Fields: 8'. Callout boxes point to various elements: 'Save the report to be accessed from the Report tab' points to the Save button; 'Add a calculation to the report' points to the Calculate button; 'Customize the color, font, and font size' points to the Style button; 'Refreshes the page and removes any unsaved changes' points to the Refresh button; 'Run the report' points to the Run button; 'Edit the name of the report' points to the Report Title field; 'Add fields to the report' points to the 'Add Fields' pane; 'Change the width of the column for a field' points to the Width column in the table; 'Include a sort order on the entries within each field' points to the Sort Order column in the table; and 'Edit the order of the fields using the up and down arrows' points to the up/down arrows in the rightmost column of the table.

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

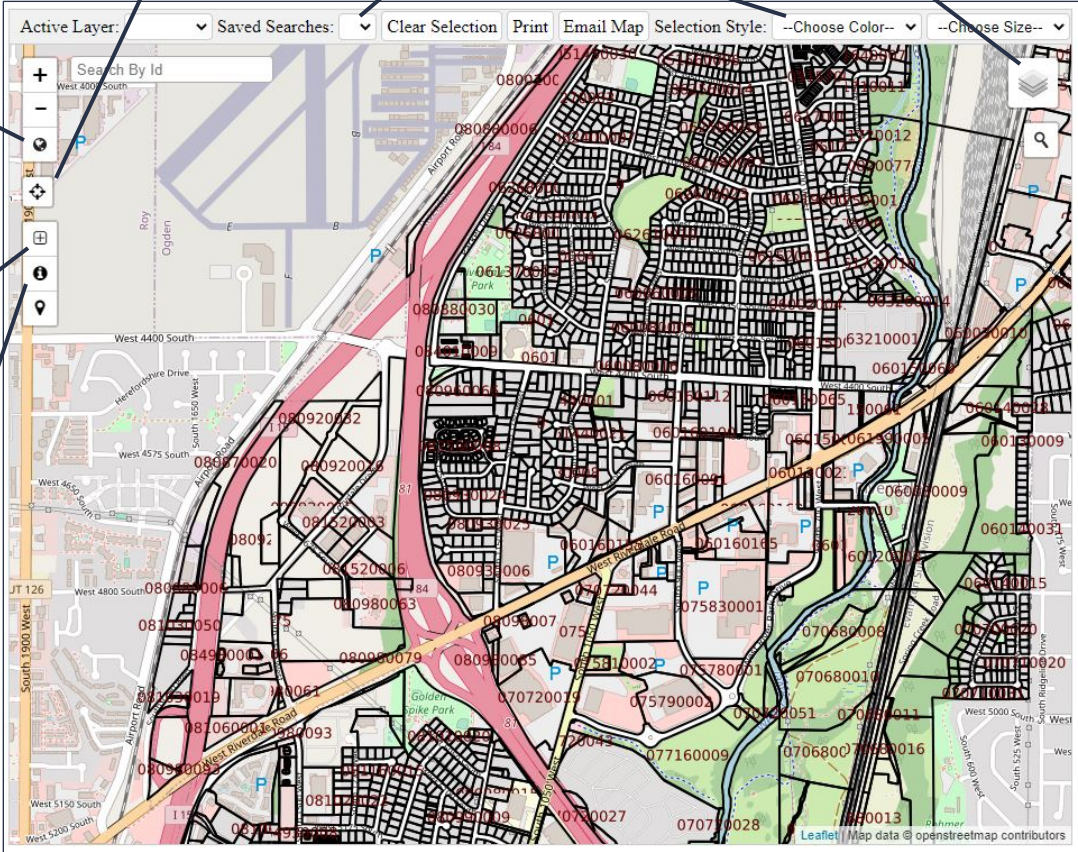
Column	Field	Width	Format	Sum	Sort Order	Sort Type	
1	Entity #	1	Numeric	<input type="checkbox"/>	Add		↑ ↓ ✖
2	Entity Date	1	Date		Add		↑ ↓ ✖
3	Main Status	1	Text		Add		↑ ↓ ✖
4	Establishment Type	1	Text		Add		↑ ↓ ✖
5	Establishment Name	1	Text		Add		↑ ↓ ✖
6	Physical Address	1	Text		Add		↑ ↓ ✖
7	Total Fees	1	Numeric	<input checked="" type="checkbox"/>	Add		↑ ↓ ✖
8	Total Payments	1	Numeric	<input checked="" type="checkbox"/>	Add		↑ ↓ ✖
							Total Fields: 8

Using the Map

Map Dashboard

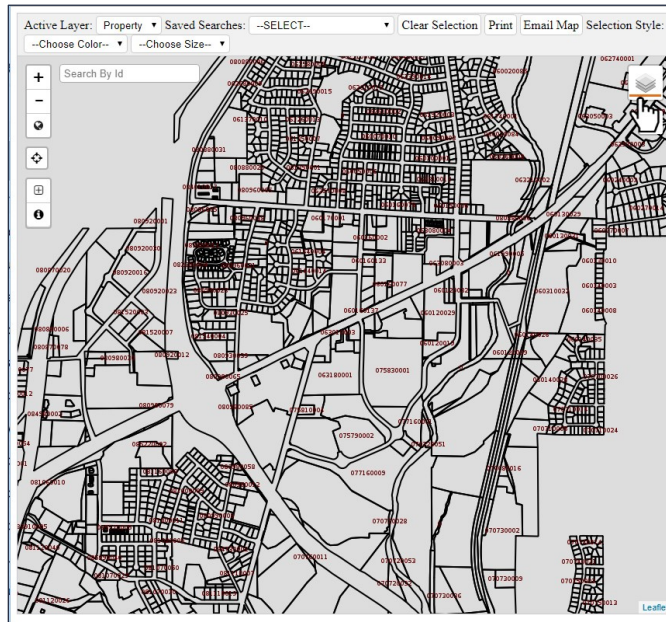
- Find current location
- Select a saved search to display on the map
- Select a color to display search results
- Select the background layer to display

- Reset the zoom
- Select one or more parcels
- Identify a property



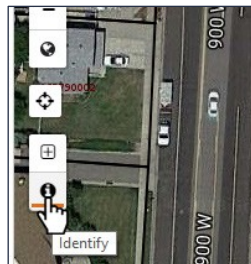
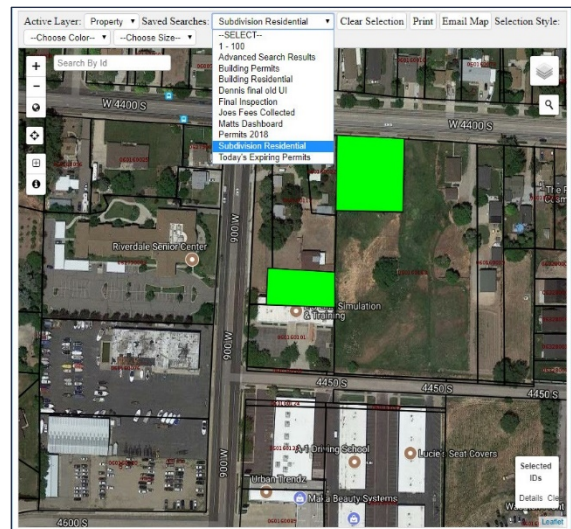
Changing the Background View

1. To adjust which layer is displayed by the parcel and permit information map, 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

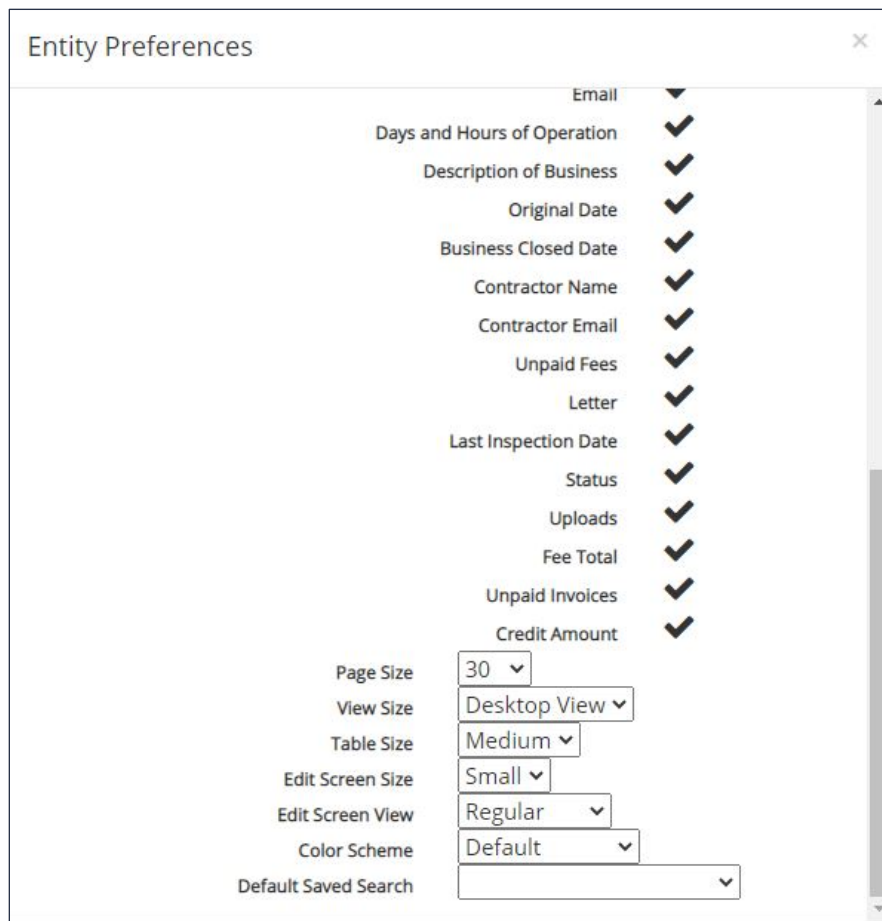
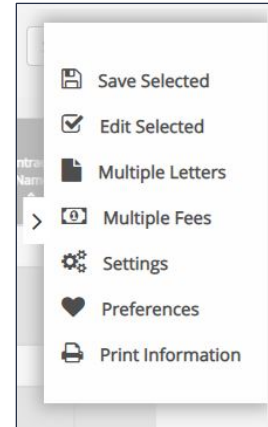
1. To display saved search data, select the saved search from the Saved Searches dropdown menu at the top of the window.
2. Results from the saved search will be highlighted on the map.
3. To view the information of a property, click the identify button and click on a highlighted shape.



Dashboard Preferences

Setting Preferences

1. To customize the display of the License Management application, select the **Preferences** button within the side menu.
2. In the Entity Preferences window, select which fields to display in the Entity View table (this does not remove a field from the application and fields can still be viewed in the Entity 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 entities by specific search parameters

Open a previously saved advanced search

Create a new entity

View entities through a specific time frame or previously saved advanced search

The dashboard interface includes the following elements:

- Navigation Tabs:** ENTITY VIEW (selected), INSPECTION DASHBOARD, LICENSE DASHBOARD, LICENSES, EMPLOYEE, PROPERTY, FEES, FIELDS, REPORTS, MAP, EMAIL SETTINGS.
- Search Options:** Main, Advanced Search, Open Saved Search, Entity Templates, New Entity.
- Entity List:** A table titled "ALL RECORDS" with columns for various entity attributes.
- Actions:** A "Select View" dropdown and a vertical toolbar on the right with icons for selection, refresh, settings, and print.

Selected	Parcel #	Property Address	Owner	Subdivision	Entity Number	Entity Date	Good Landlord	Establishment Type	Establishment Name	Tenant	Floodplain	Physical Address	Mailing Address	Email	Number of Employees	Owner Name	Phone Number	Email	Days and Hours of Operation	Description of Business	Original Date	Business Closed Date	Contractor Name	Contractor Email
<input type="checkbox"/>					298	12/30/2020																		
<input type="checkbox"/>	070760013	5498 S Weber DR	Steve Hulse	Lazy Three	297	11/25/2020			Owner's Name			5498 South Weber Drive				Pacos Tacos	2086041523							
<input type="checkbox"/>					296	10/22/2020			Jack's Pizza			20 S Main			5	Jack	111-222-3333	jpizza@gmail.com						
<input type="checkbox"/>	051440001	6500 W BROOKSHIRE DR	Ty Pebley		294	10/14/2020		Residential	Rental Property			6500 W Brookshire Dr	P.O. Box 123			Ty Pebley	208-670-3219	ty@iworq.com						
<input type="checkbox"/>	123456	123 Center Street	Amy Adams	Green Pines	292	10/12/2020			Mop Files			123 Center Street				Amy Adams	435-111-2222	amy@adams.com						

Click on the row of an entity to open the Entity Information window

Save or edit selected entities, attach multiple letters or fees, edit preferences, and print information