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!

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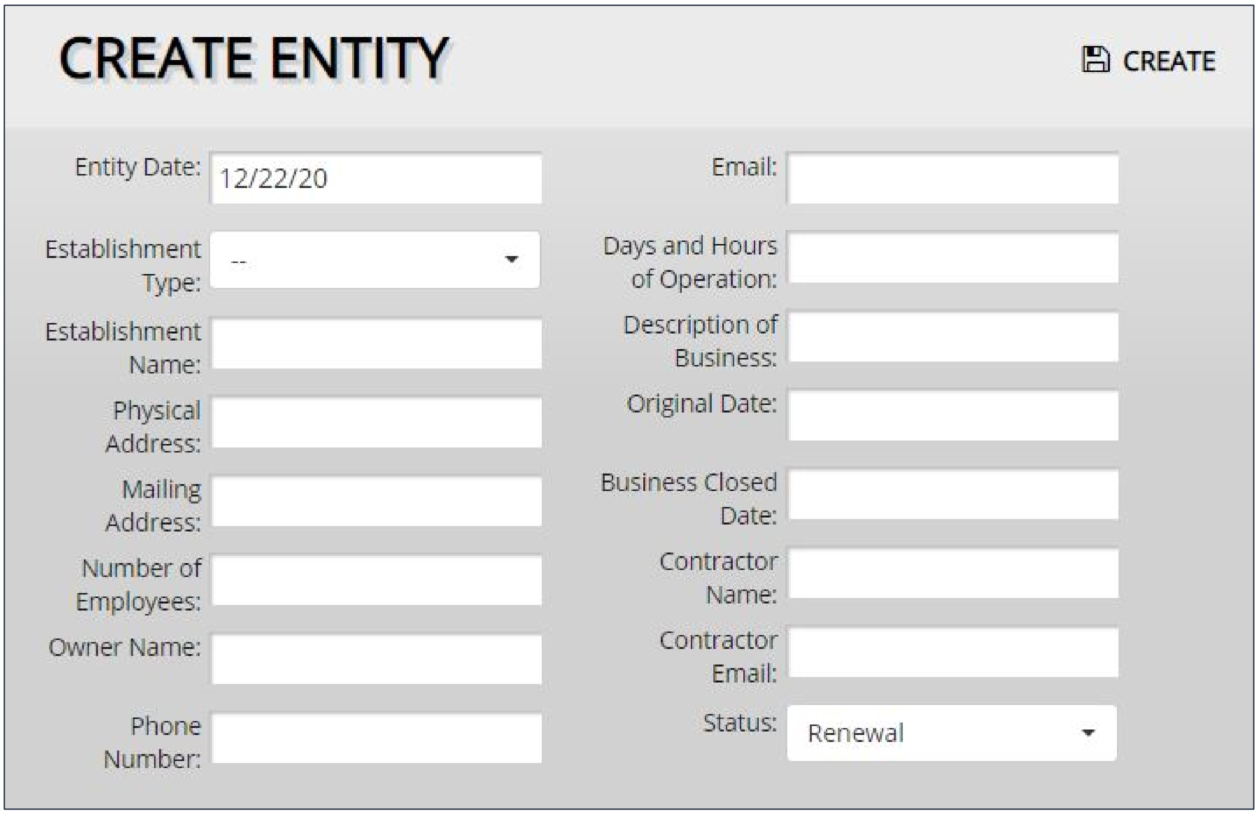
Creating and Managing Entities

Creating a New Entity

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

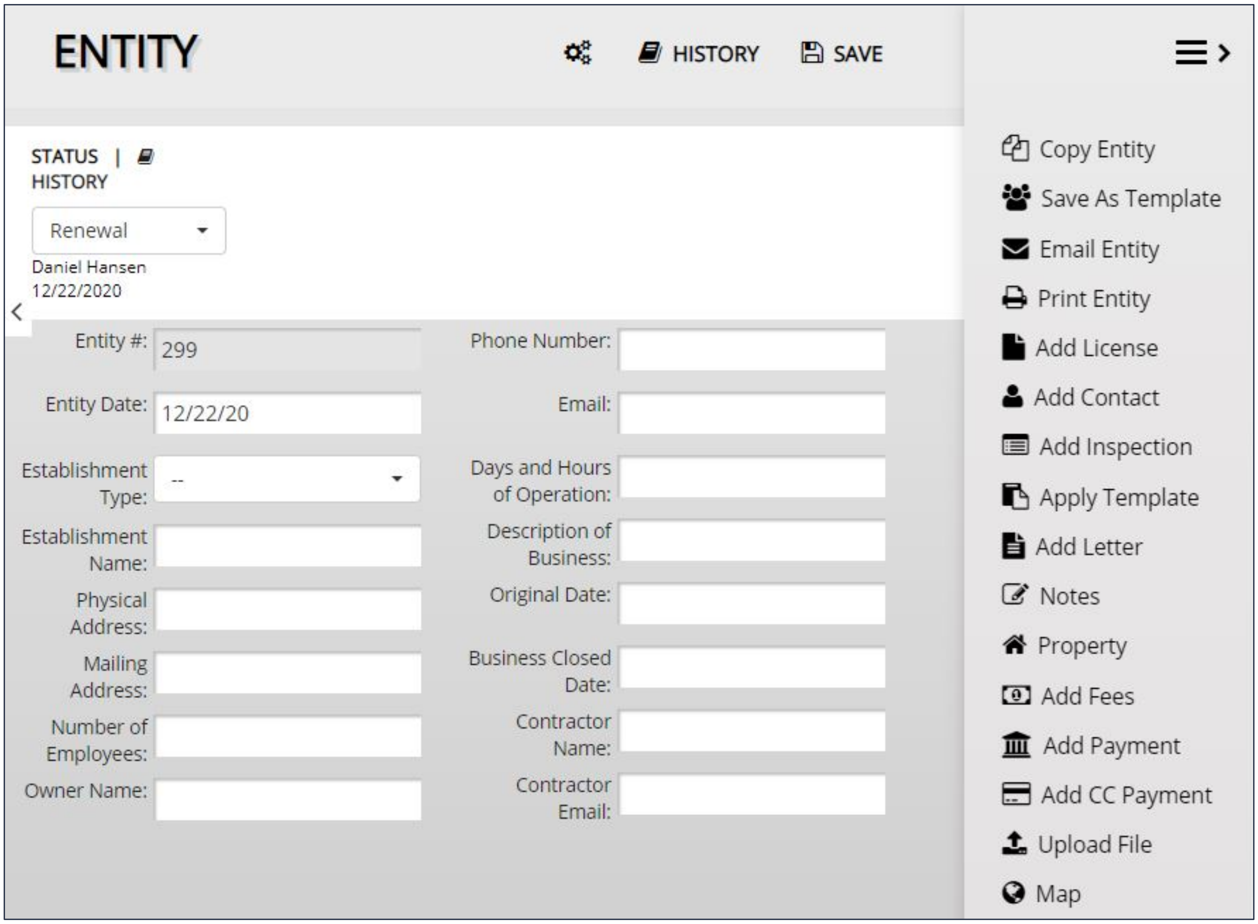


2. Fill out the entity information. This can be changed later if necessary.
3. Click the **Create** button.

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.



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

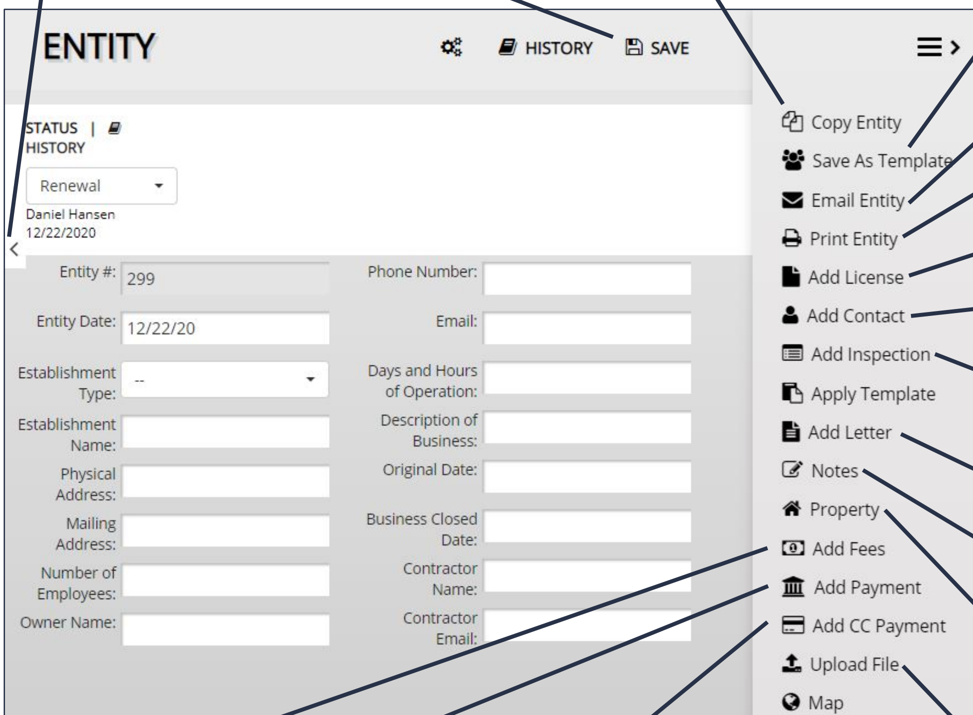
The Entity Information Window

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



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

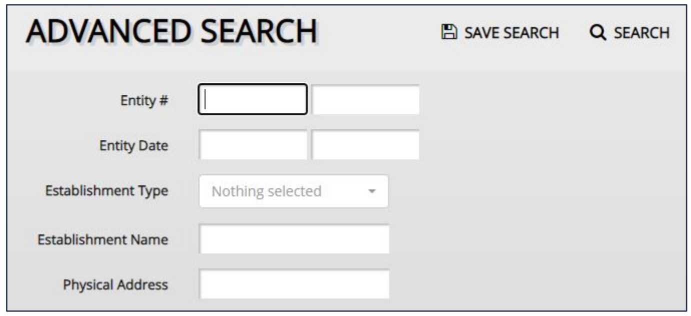
Upload files to the entity

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

Advanced Search

Using the Advanced Search

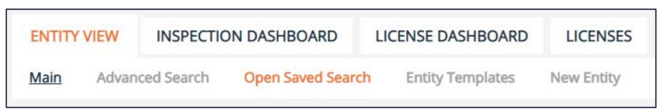
1. Click the **Advanced Search** button in the sub-menu.



2. The Advanced Search allows the user to search by any fields in the application. Enter the desired search parameters and click **Search**.

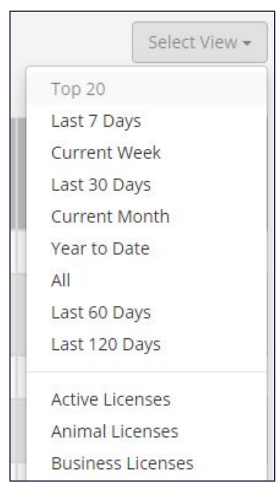
3. Searches can be saved for later ease of access. To save a search, click the **Save Search** button before clicking Search.

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**.



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

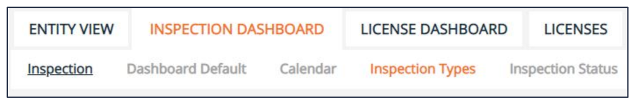
Inspection Dashboard

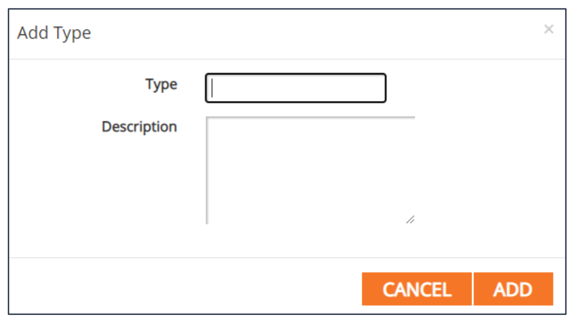
The Inspection Dashboard is for managing inspection types and statuses used when scheduling an inspection.

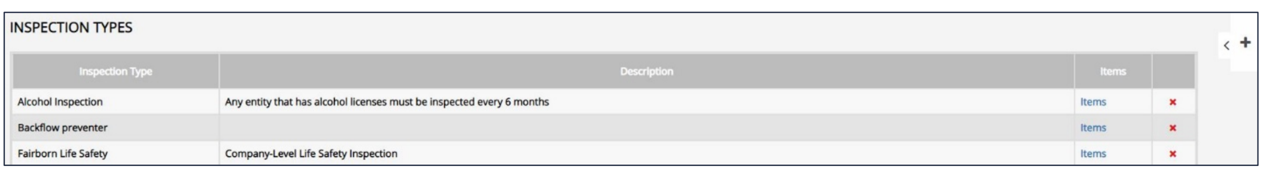
Inspectors are considered employees and are added to the database through the employees tab. See page 8 for managing employees.

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.



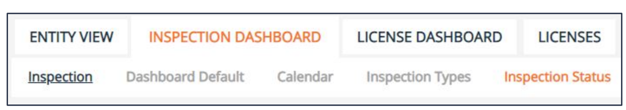


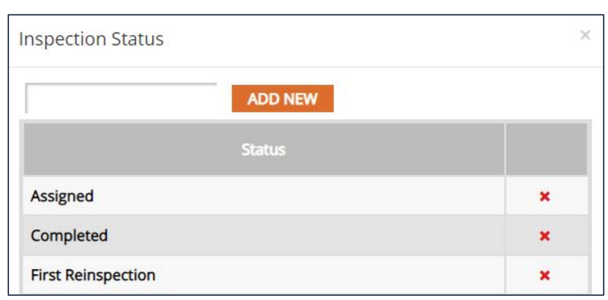

INSPECTION TYPES

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

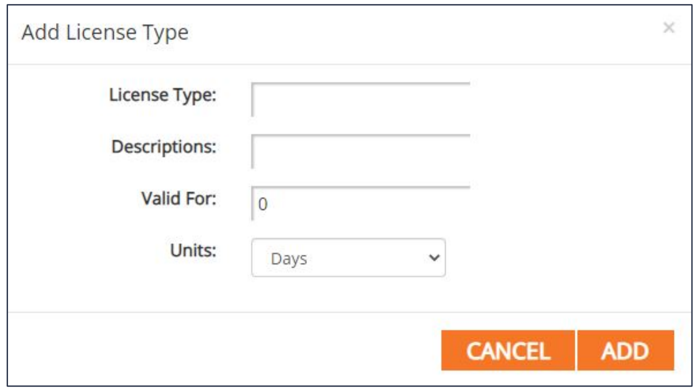
1. Click the **Inspection Status** button in the sub-menu.
2. Enter in a new status into the textbox and click **Add New**.
3. To delete existing statuses, click the red X at the end of the status's row in the table.



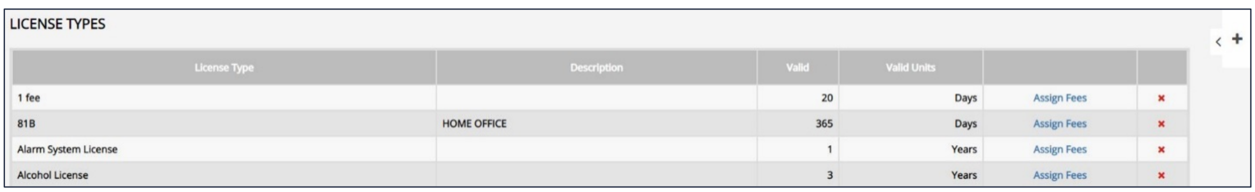


Licenses

Adding a License Type



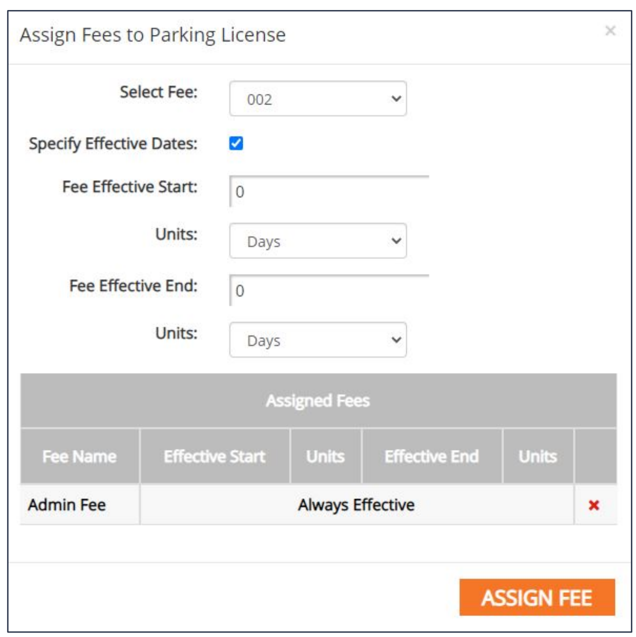
1. To add a new license type, click the **Add Type** button within the side menu.
2. Enter the license information.
3. Click **Add**.
4. To assign fees to the license type, click the blue **Assign Fees** button in the row of the license in the table.



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	×

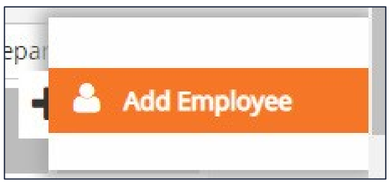
5. Select the fee to assign to the license from the drop-down menu. To add new fee types, see page 10.
6. Edit other fee information as necessary. Click **Assign Fee**.
7. Under the Assigned Fees table, click the red X at the end of a fee's row to unassign the fee from the license.
8. Click on a license's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

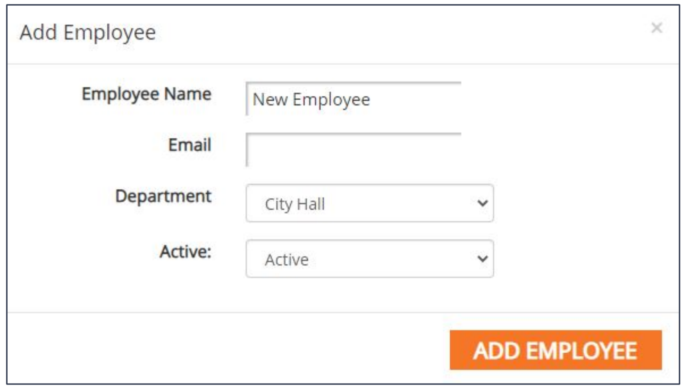


Employees

Adding an Employee

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

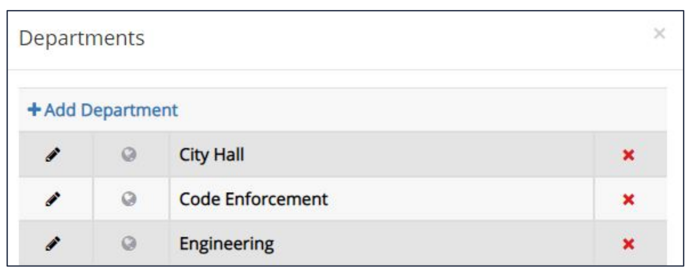


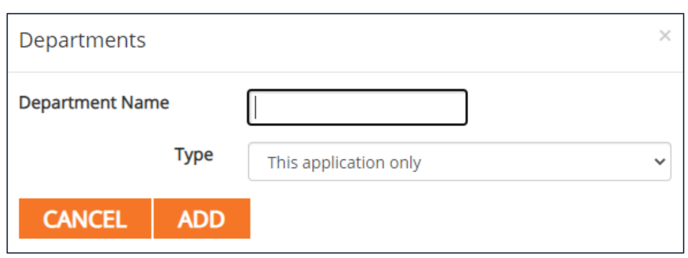


2. Fill in the employee information and click Add Employee.

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 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.



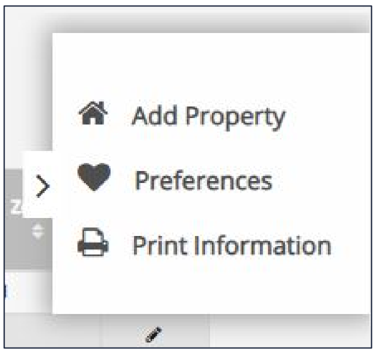


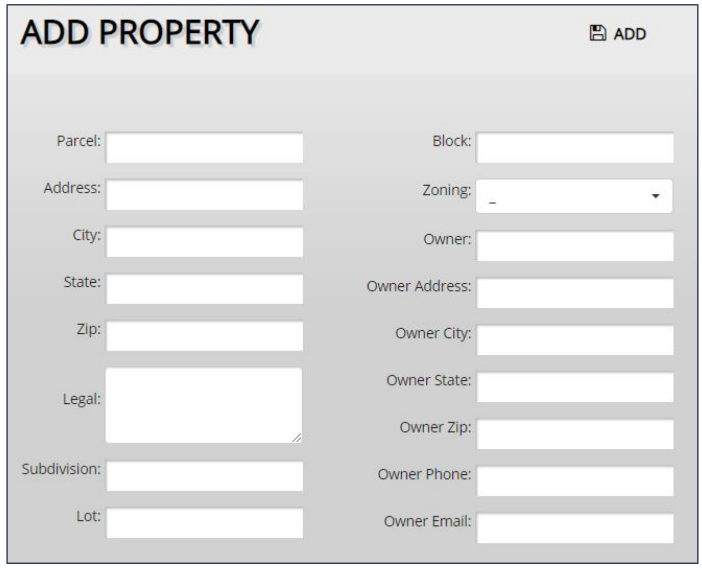
6. To delete an existing department, click on the red X at the end of the department's row in the table.

Property

Adding Property

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

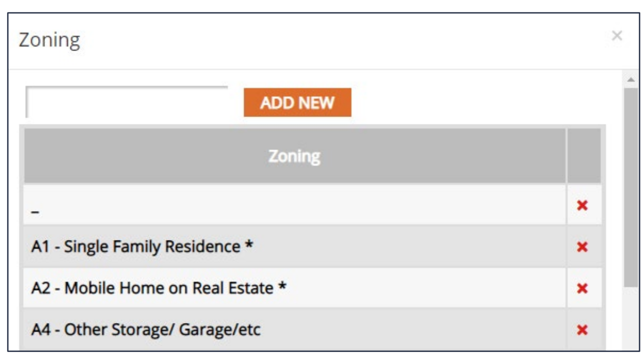




2. Fill in the property details.
3. Click **Add**.

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.

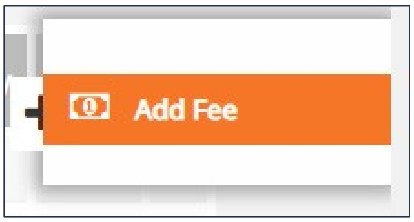


We can upload your property information into your application. Call Technical Support at 888.655.1259.

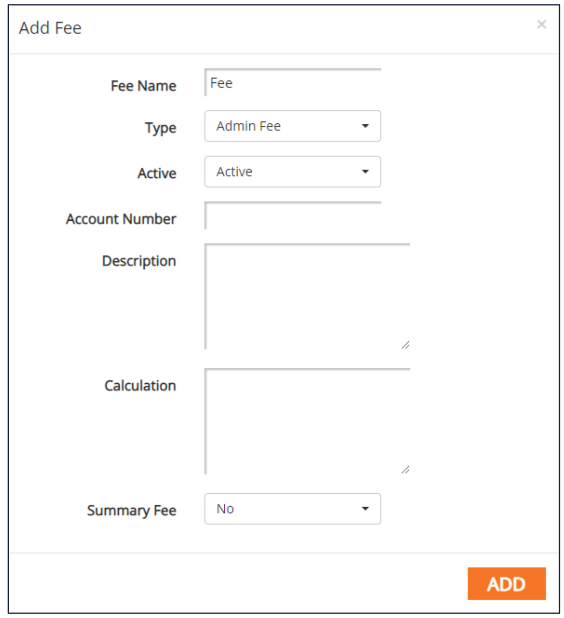
Fees

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:

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

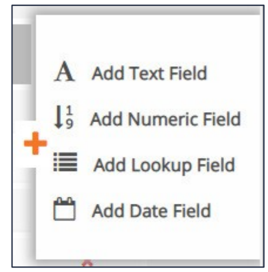
For example, to create a fee of $2 for every square foot of a property where the entity field for square feet is named “Sq Feet”. The formula would be:

2*[Sq Feet]

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

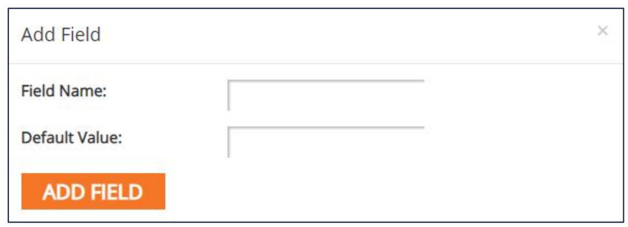
Customizing Data Fields

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.

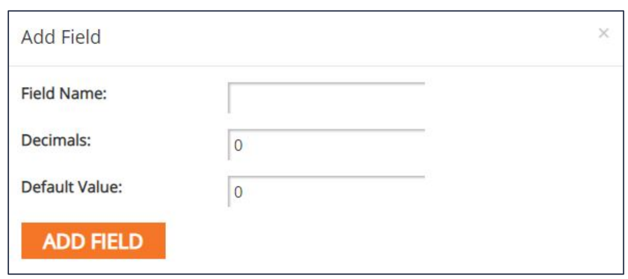
Text Fields



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.

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.

Date Fields

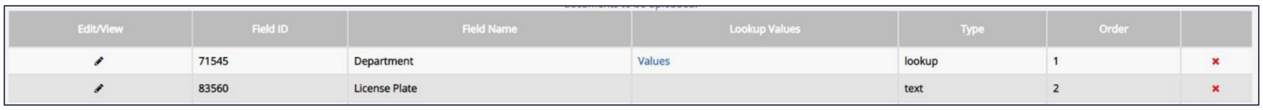
The Date Field accepts numbers formatted as dates.

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.

Lookup Fields

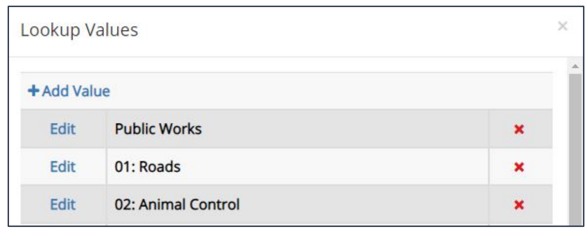
The Lookup Field creates a drop-down menu box.

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.

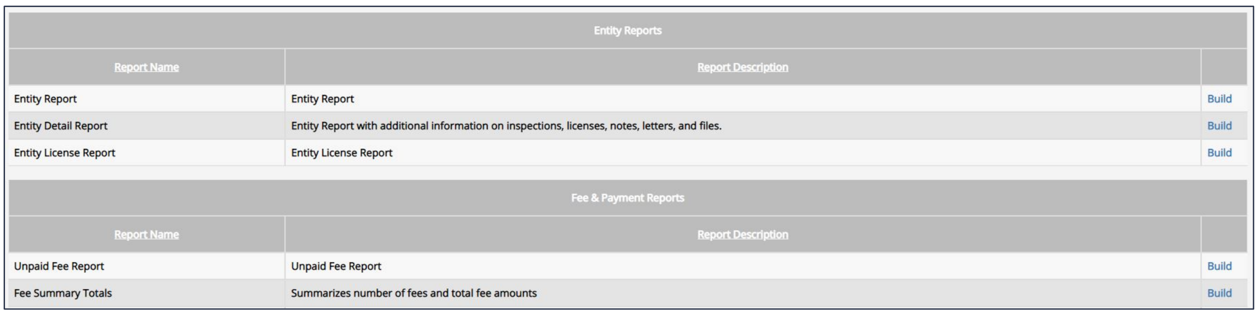
Reordering Fields

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

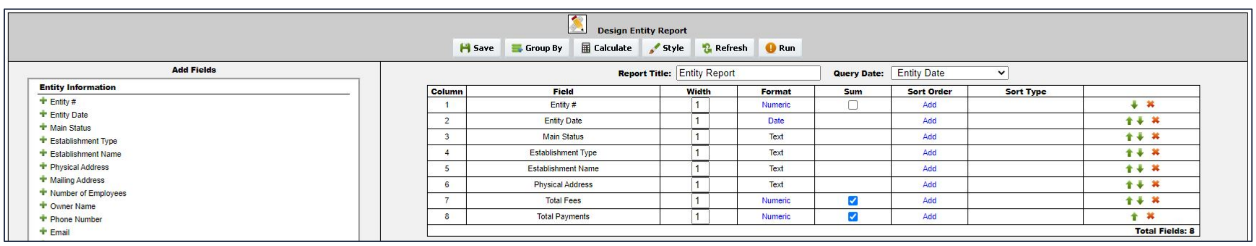
Building a Report

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.



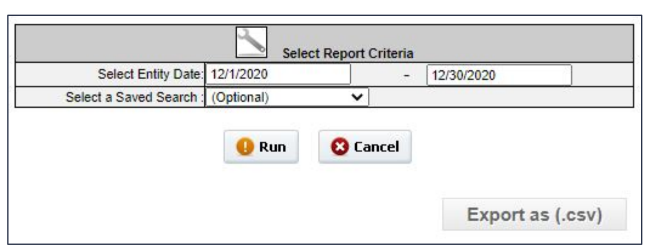
Entity Reports		
Report Name	Report Description	
Entity Report	Entity Report	Build
Entity Detail Report	Entity Report with additional information on inspections, licenses, notes, letters, and files.	Build
Entity License Report	Entity License Report	Build
Fee & Payment Reports		
Report Name	Report Description	
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.

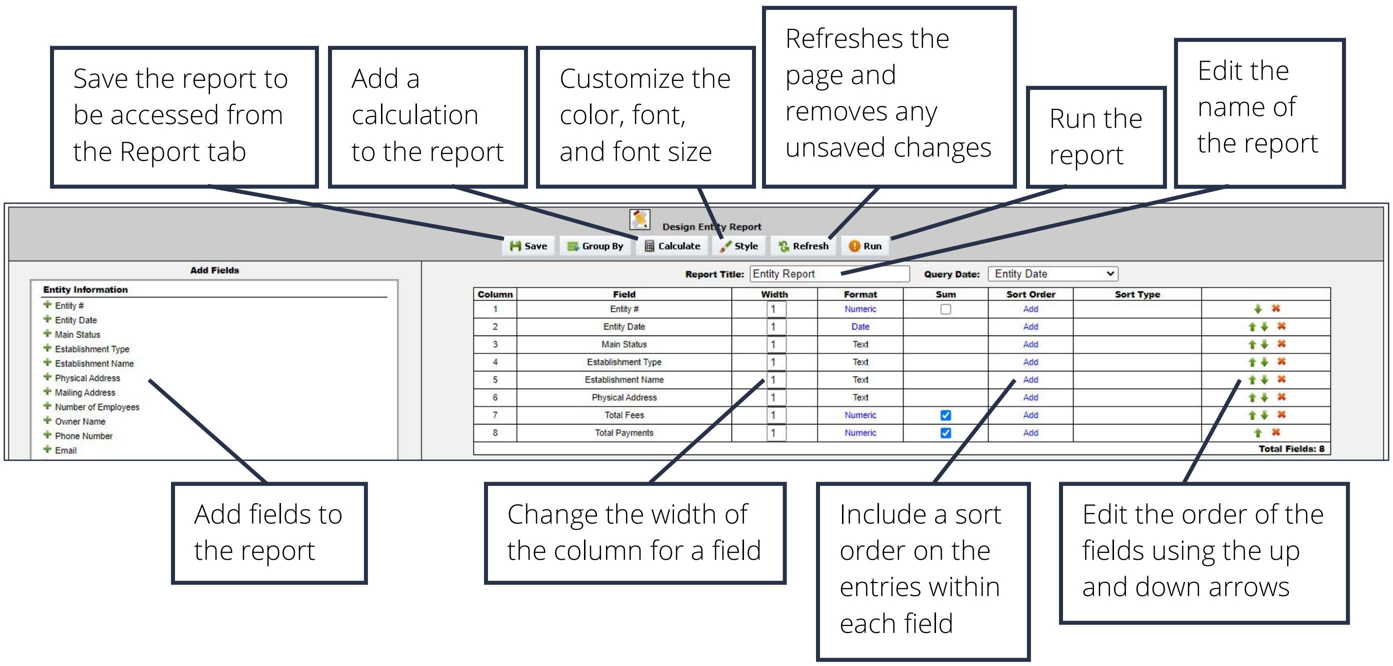


3. Select the data range for the report. Use a saved search to further narrow results, if desired. Once the necessary criteria has been selected, click **Run** to view or print the report, **Cancel** to return and further build the report, or **Export as (.csv)** to download the data in a spreadsheet.

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

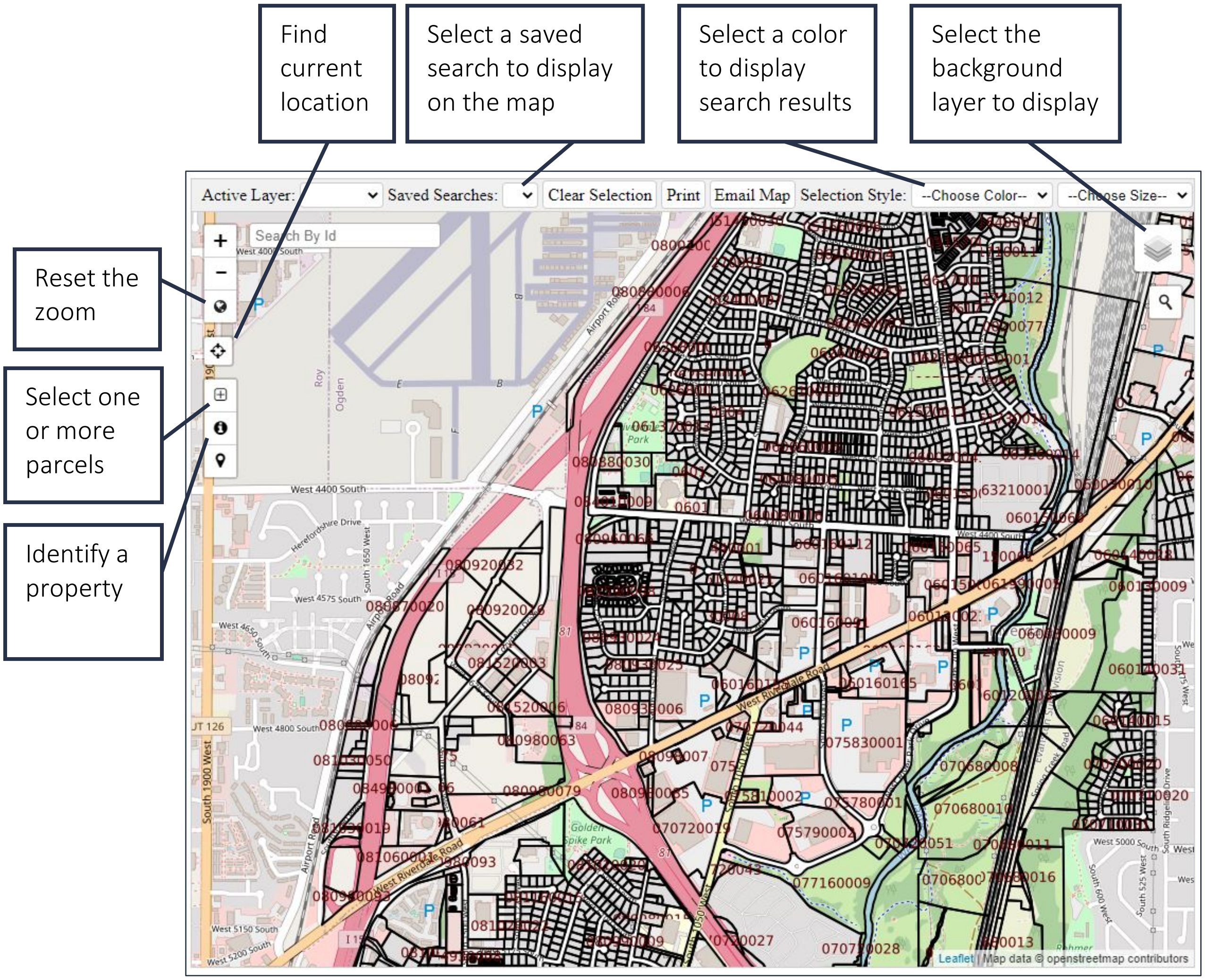


The Reports Interface



Using the Map

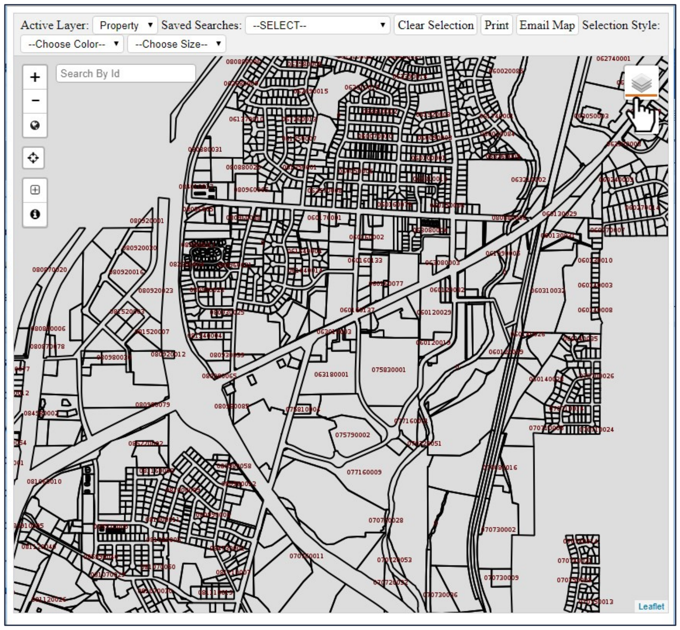
Map Dashboard



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.

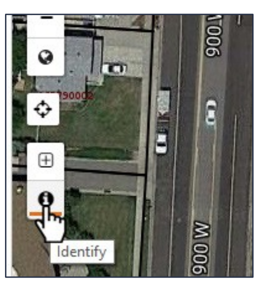


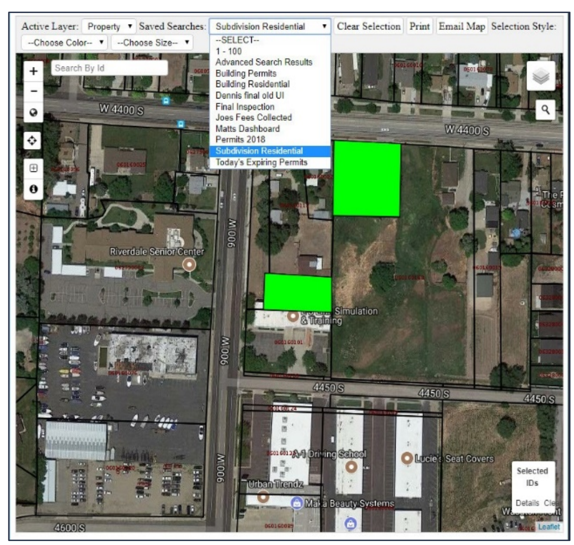
Viewing Saved Searches

1. To display saved search data, select the saved search from the Saved Searches 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.

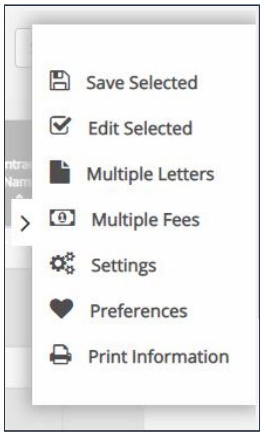




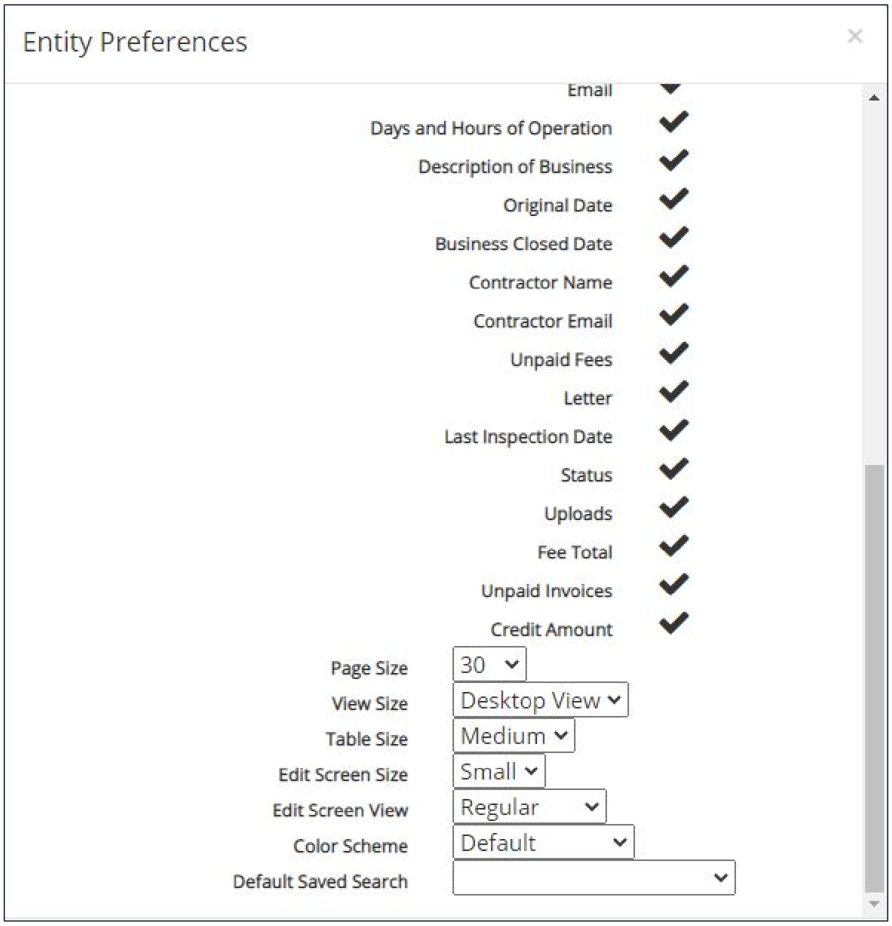
Dashboard Preferences

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.



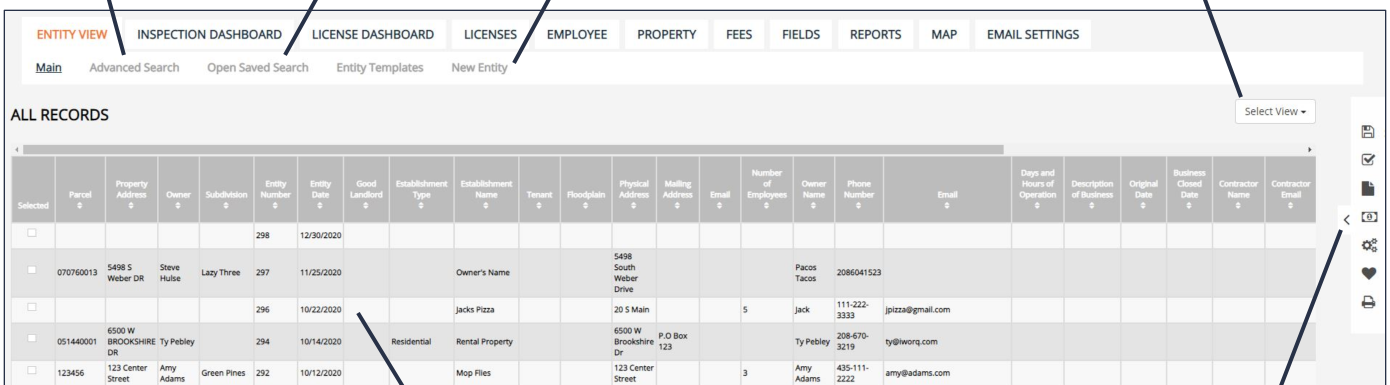
Dashboard Overview

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



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