

## SETTING UP A NEW DATABASE FOR THE NEW TAX YEAR

All pictures used in Help Docs are shown with the "Use In-Line (New Style Controls)" setting. Your screens may differ.

### **THIS DOCUMENT DOES NOT APPLY TO UNITS FOR WHOM BS&A DOES A YEARLY CONVERSION OF DATA FROM THE COUNTY**

#### **STEP ONE: ADD THE NEW DATABASE**

1. Open the **File** menu and select **New Database**.
2. When you receive the Add a New Database window, type the name of your new database. It should be no more than 8 characters long, with an optional 3-character extension (no spaces allowed). For example: MICH04 or MICHIGAN.04. Press your [Enter] key or the Continue button when you are done typing.
3. When you return to the Add a New Database window, click the **Ok** button.
4. The program will create the new database and ask if you want to open it now. Answer **Yes**.

#### **STEP TWO: COPY INFORMATION FROM THE PREVIOUS YEAR DATABASE**

**IMPORTANT.** There are two types of data files available for copying: **Database-specific** and **Parcel-specific**. It is imperative you know the difference between the two and how each will affect your database.

**Database-specific** files are the only files used in the process we are about to outline. These files contain database-wide information such as Property Class Codes and School District Codes, but do not include which parcel gets what school code or which property class; basically, these files contain information that is available for use among all parcels. A table illustrating the Database-specific files and whether or not you should consider copying them to your new database is provided below. PLEASE REVIEW THIS TABLE PRIOR TO MAKING YOUR FILE SELECTIONS.

Database-specific file	Use
<b>TXBANK.DAT</b>	Contains ACH bank code information used when assigning a bank code to a parcel for ACH tax payments.
<b>TXGLEXP.DAT</b>	Contains your listing of General Ledger numbers for use with Equalizer and other GL programs. GL setup information is found on the Taxes Setup window.
<b>TXMORT.DAT</b>	Contains your mortgage codes and mortgage company address information. It will not assign mortgage codes to your parcels, nor will it copy the information from your previous year database. See the help document entitled "Mortgage Code Transfer" available through the Help menu of the Tax System or on the FAQ page of this website. Mortgage company setup information is found on the General Setup window.
<b>TXMSG.S.DAT</b>	Contains your tax bill messages for Summer, Winter, and Village seasons. Any specific date references will need to be updated once the previous year database is copied to the new database. Tax Bill Message setup information is found on the General Setup window.
<b>TXNAMES.DAT</b>	Contains your tax names and millage rates tables. Because the copy will copy prior years rates, DO NOT FORGET to update your millage rates in the new database BEFORE trying to balance your Roll. Tax Names and Millage Rates Tables setup information is found on the Taxes Setup window.

<p><b>TXPARAM.DAT</b></p>	<p>Contains the settings for Program Preferences and Receipt Options from the previous year database, such as links to your Assessing System and/or Special Assessment System database(s) and your parcel number format. DO NOT FORGET to update your link to the current year Assessing System database once you are in your new tax database. Program Preferences setup information is found on the General Setup window; Receipt Options setup information is found on the Taxes Setup window.</p>
<p><b>TXSPLIST.DAT</b></p>	<p>Contains a list of your special assessment district codes and descriptions. The codes per parcel will need to be added manually or imported from your prior year database. See the help document entitled "Transferring Special Assessments" available through the Help menu of the Tax System or on the FAQ page of this website. Special Assessment setup information is found on the Taxes Setup window.</p>
<p><b>TXUNIT.DAT</b></p>	<p>Contains information about your unit such as your address information. SPECIAL CONSIDERATIONS ARE INVOLVED IN COPYING THIS FILE. PLEASE SEE "SPECIAL NOTE" AT THE END OF THIS SECTION ("STEP 2 - COPY INFORMATION...")</p>
<p><b>TXUSERD.DAT</b></p>	<p>Contains user-specific settings for each database such as color preferences and field behavior. User Preferences are found on the General Setup window.</p>

**Parcel-specific** files contain information about each individual parcel, such as the Taxable Value, any payments made to the parcel, legal descriptions, etc. It is unlikely you would want to bring over payment information on a parcel from the previous year to the new year. Parcel-specific files are not to be copied during this process.

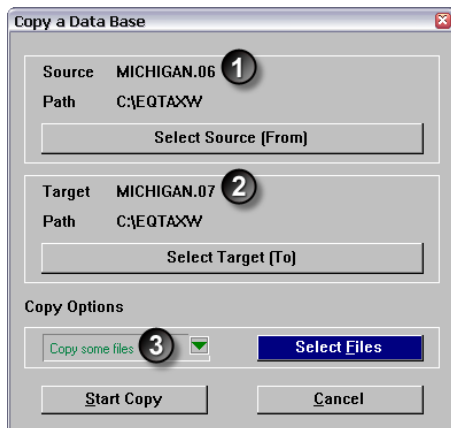
Determining which files to copy to your new database depends on your unit's needs and how you use the Tax System. There may or may not be a need to copy particular files, and what works for one unit doesn't necessarily work for another. IT IS UP TO YOU to decide which files illustrated above are best to copy from your previous year database to your new one. If after reviewing these files and their definitions you are unsure, please feel free to call us before attempting the copy process.

1. While in your new database, open the **File** menu and select **Copy Database**.
2. Click the **Select Source (From)** button and select your previous year database from the list that appears.
3. Click the **Select Target (To)** button and select the database you just created.
4. Your screen should resemble the picture, but keep in mind your database names will be different.

**Previous** year database must appear in the **Source** box ❶.

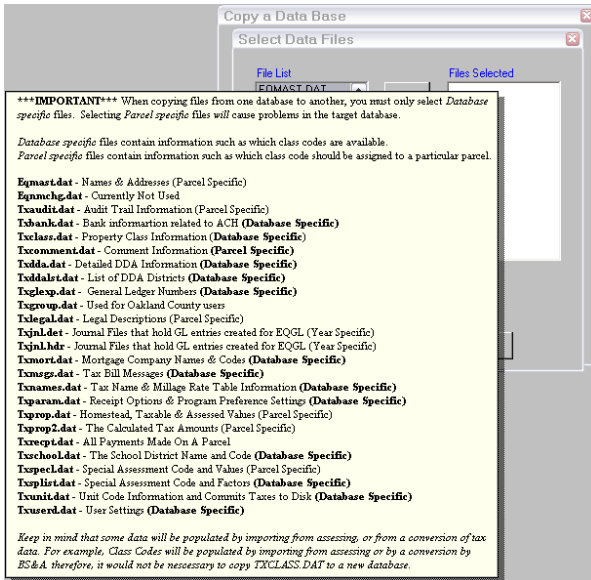
**New** year database that you just created must appear in the **Target** box ❷.

**Copy Options** must say **Copy Some Files** ❸.



- Click the **Select Files** button to receive a list of the available files for copying.

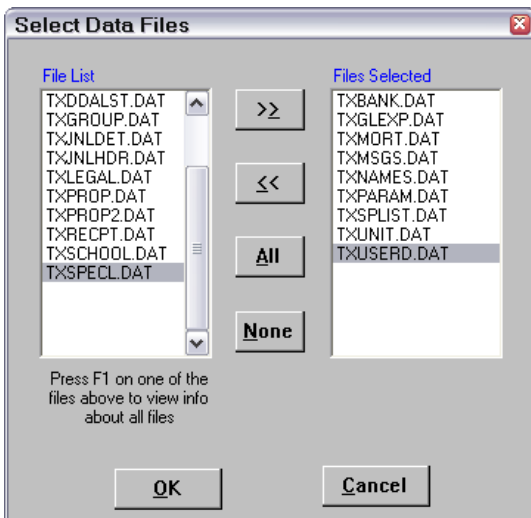
Press your [F1] key to bring up a Help window of the files available. Each file is identified as either Database-specific or Parcel-specific.



Database-specific files are the only files that will get copied to the new database. **DO NOT SELECT ANY "PARCEL-SPECIFIC" FILES.** If you feel you need to copy any Parcel-specific file(s), please call us before attempting the copy process.

- If you've opened the Help window, press your [Esc] key to close it.
- Double-click each **Database-specific** file (review the Table provided) you wish to copy from your previous year database to your new one. This will move the file from the File List on the left to the Files Selected List on the right.

When you have selected all files you want, this is how your screen may appear. Keep in mind you are not required to copy all files shown; only those for your specific need.

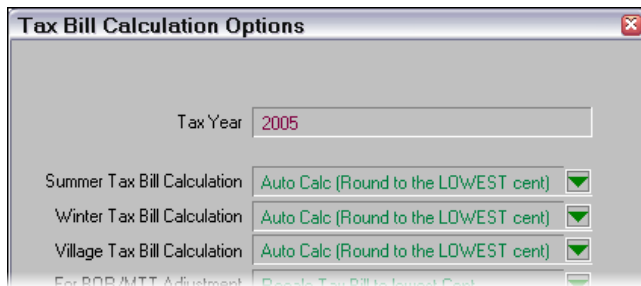


- When you're satisfied with your selection, click the **Ok** button to return to the Copy a Database window.

9. Click the **Start Copy** button. You will receive a prompt warning you that the files you are copying will overwrite the data in the new database's files. Pay close attention to this warning and verify its accuracy; once you've verified that you are copying files to the new database, answer **Yes** to this prompt.
10. When done, you will be told "Operation Complete". Click the **Ok** button to clear this message.

**SPECIAL NOTE: IF YOU SELECTED "TXUNIT.DAT" AS ONE OF THE FILES TO BE COPIED, PLEASE FOLLOW THESE INSTRUCTIONS:**

11. Click **Taxes Setup** on the Navigation Tree.
12. Click the **Calculation Options** button.
13. Change the year appearing in the **Tax Year** field to the new tax year.
14. Check the **Summer, Winter, and Village Tax Bill Calculations** fields. Any of the three that read "Taxes read from Disk, No Auto Calc" need to be changed. Click the  button at the edge of each field, answer **Yes** to the prompt, and select "Auto Calc (Round to the LOWEST cent)".



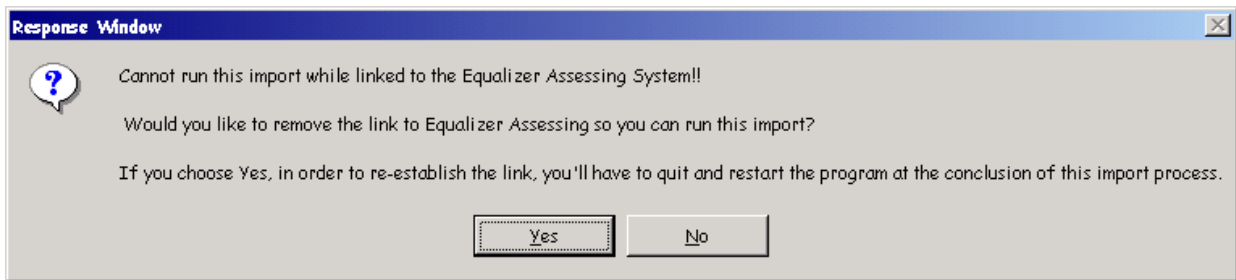
15. Click the **Close** button to return to the Taxes Setup window.

**STEP THREE: IMPORT FROM EQUALIZER ASSESSING**

Check with your assessor as to the location of the export files he/she created. If both the Tax and Assessing Systems are on the same network, the assessor will most likely have put the export files directly on the network, eliminating the need for a diskette/CD/zip disk. Use the following table as a guide for making the proper selections when prompted:

Location of Export Files from Assessor	When prompted if importing from disk or zip disk (Step 8)...
<b>Network or hard drive</b>	answer no and browse for location on network (or hard drive)
<b>Diskette</b>	answer yes and select (typically) A:\
<b>CD or Zip Disk</b>	answer yes and browse for CDROM drive or Zip drive, whichever is used

1. If you were given a diskette/CD/zip disk, put it in the appropriate drive.
2. Open the **File** menu and select **Imports into Database**.
3. Select **Various Imports to Communicate with Other Equalizer Software Systems**.
4. Select **Equalizer Assessing/Equalization Import**. IF the Tax System detects a link to the Assessing/Equalization System, the following prompt appears. In order to proceed, you must break the link; you will be able to re-establish the link by exiting the Tax System at the completion of the import. Answer **Yes** to remove the link.

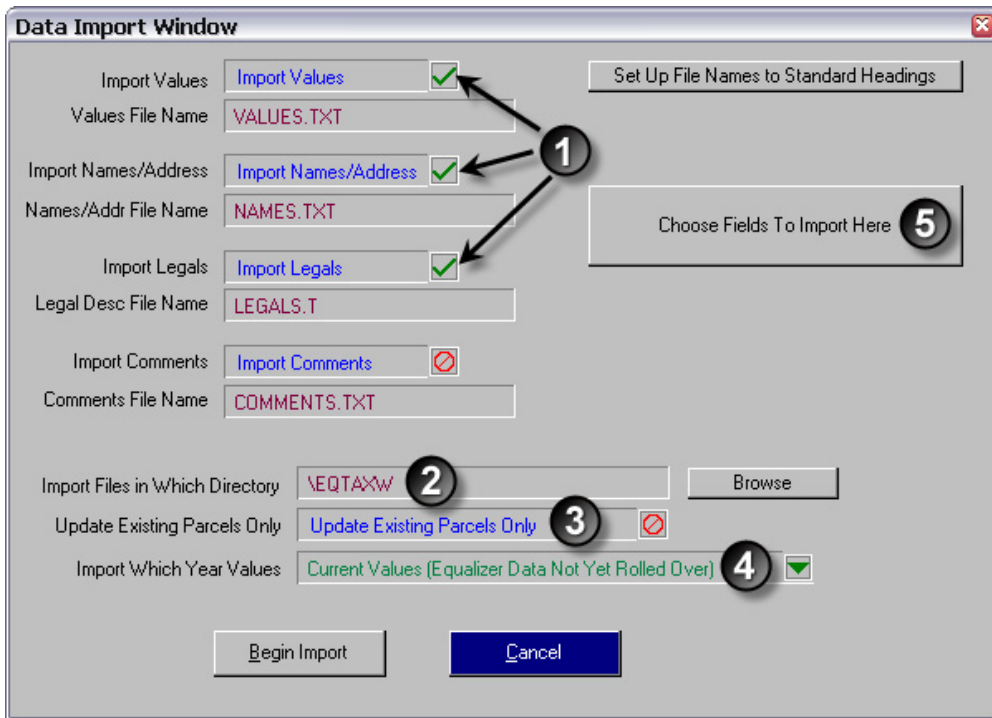


5. The program verifies that you wish to run the import (this prompt immediately appears if you were not linked to the Assessing/Equalization System). Answer **Yes**.
6. The program brings up a prompt verifying that you are in the correct database. If you are, answer **Yes**.
7. When asked if importing from a diskette or zip disk, answer appropriately depending on the location of the export files (use the table at the top of the page as your guide).
8. If you are importing directly from a location on your network or hard drive, the Data Import window immediately appears. If you are importing from a diskette/CD/zip disk, the export files will be copied to your program directory (typically, C:\EQTAXW); a prompt will appear when completed. Answer **Yes** to this prompt to receive the Data Import window.

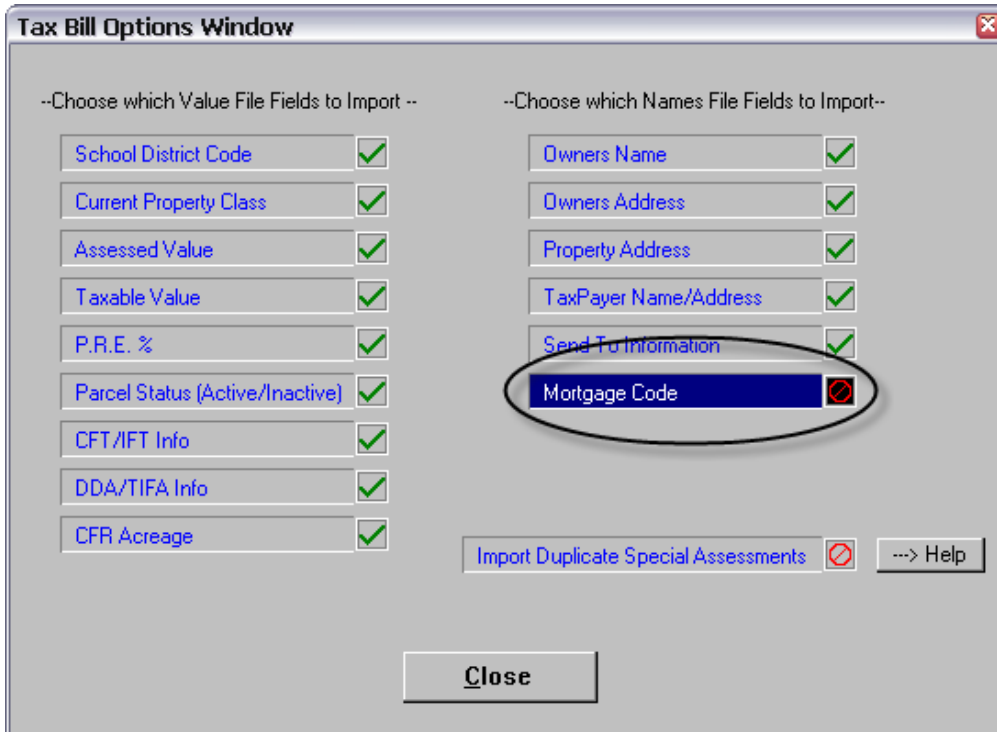
- 9. **Import Values, Import Names/Addresses, and Import Legals** must be turned on\* and the file names spelled as pictured ①.

**\*If your taxes have been committed to disk, the fields in the Values file will not come in during the import; you will need to make any value changes through the Adjustment process. The program will warn you if this is the case, and you will need to begin the import again, turning off the Import Values field.**

- 10. If you are importing directly from your network or hard drive, the **Import Files...** field reflects the location you specified in Step 8. If you are importing from diskette/CD/zip disk, this field should read C:\EQTAXW ②.
- 11. Leave the **Update Existing Parcels Only** field turned off ③.
- 12. Check with your assessor as to which database was exported and make the appropriate selection in the **Import Which Year Values** field ④.
- 13. Click the **Choose Fields...** button to receive a window where you can choose whether or not to import certain fields ⑤.



14. Among these fields is **Mortgage Codes**. This is turned off -  - by default, meaning mortgage codes will not come in during the import. If you would like to bring in mortgage codes from your Assessing program, click this field to turn it on - .



15. Click the **Close** button in this window to return to the Data Import window.
16. When you return to the Data Import window, click the **Begin Import** button and answer **Yes** when prompted.
16. **IMPORTANT REMINDERS:**
  - o modify your interest and penalty due dates
  - o if you link to Equalizer Assessing, you will need to update this link to the assessor’s current database

**If you had been linked to the Assessing System, you will need to exit the Tax program and get back in to re-establish the link.**