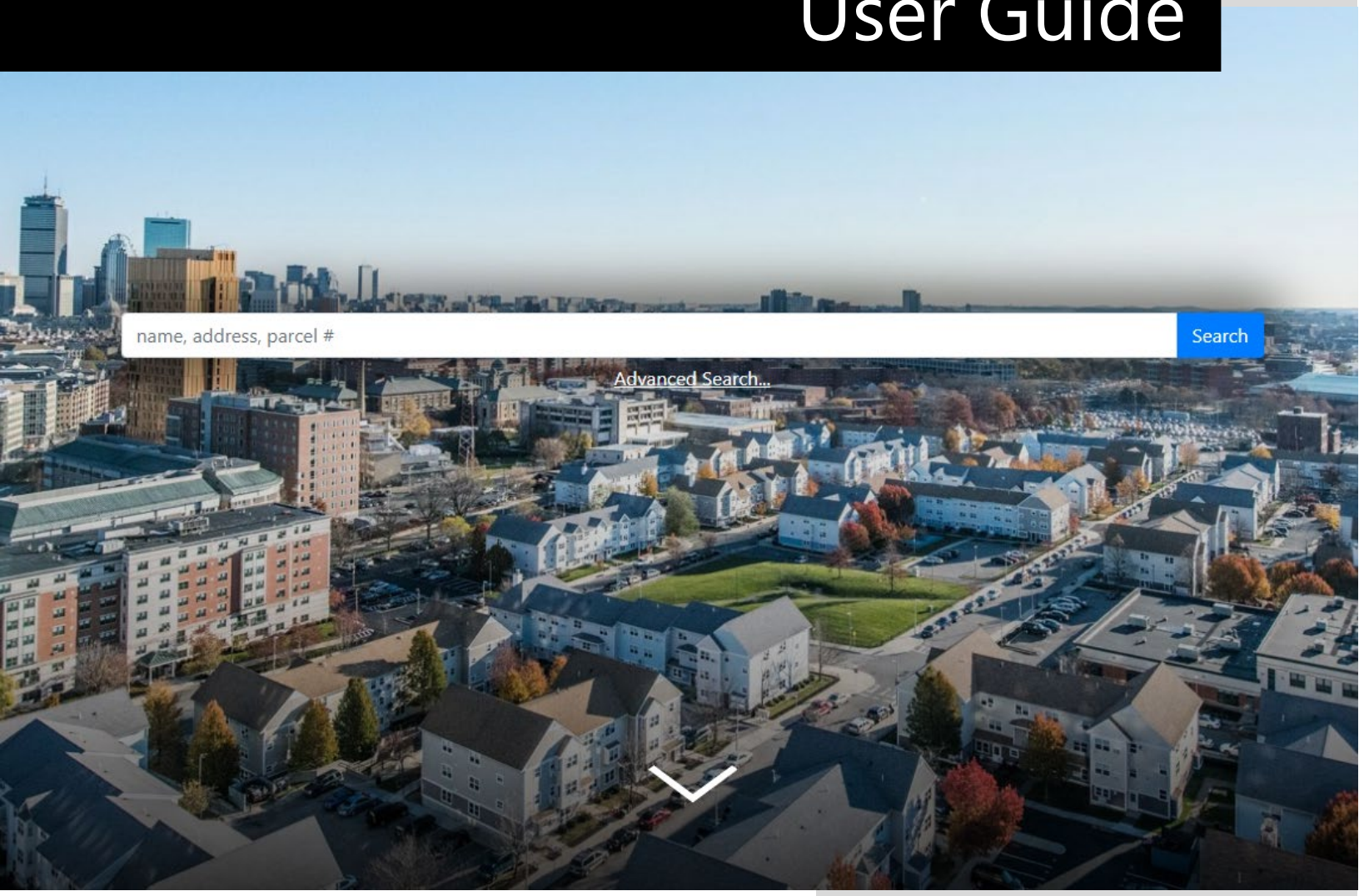
User Guide



engage™; citizen engagement portal

XSoft, Inc.

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engage™

User Guide

Welcome to ***engage***™; *citizen engagement portal*!

The term "citizen engagement" is not new, but the way that citizens engage with local governmental agencies has changed tremendously in recent years.

A modern approach to citizen engagement suggests that some citizens appreciate the ability to interact with their local government in a digital environment, such as online access to services to; pay property taxes, research publicly available information, submit documents and forms, etc. That's where ***engage*™** comes in!

engage™ is an online resource where citizens, real estate professionals, businesses, etc. can access all kinds of publicly available information related to property, such as; owner name, assessed value, neighborhood amenities, improvement information, property taxes, property record cards, interactive forms, and so much more!

As a core product for **XSoft**®, ***engage*™** has been designed to take advantage of dynamic integration to **XSoft's**® other core products, ***INcama***™ and ***INtax***™, which are used by local government agencies for property tax assessment, billing, collection, and distribution purposes. This dynamic integration means that the data you're viewing in ***engage*™** is as current and up to date as possible.

engage™ is intended to be an intuitive, user-friendly application. However, we know that some features of ***engage***™ could use a bit of guidance to be completely beneficial to you. That's the purpose for this user guide – to help you be a little more productive as you use ***engage***™.

Be sure to keep an eye out for the **TIP** text in red throughout this document – it'll provide you some helpful hints.

To learn more about **XSoft**®, please visit us at; www.xsoftinc.com

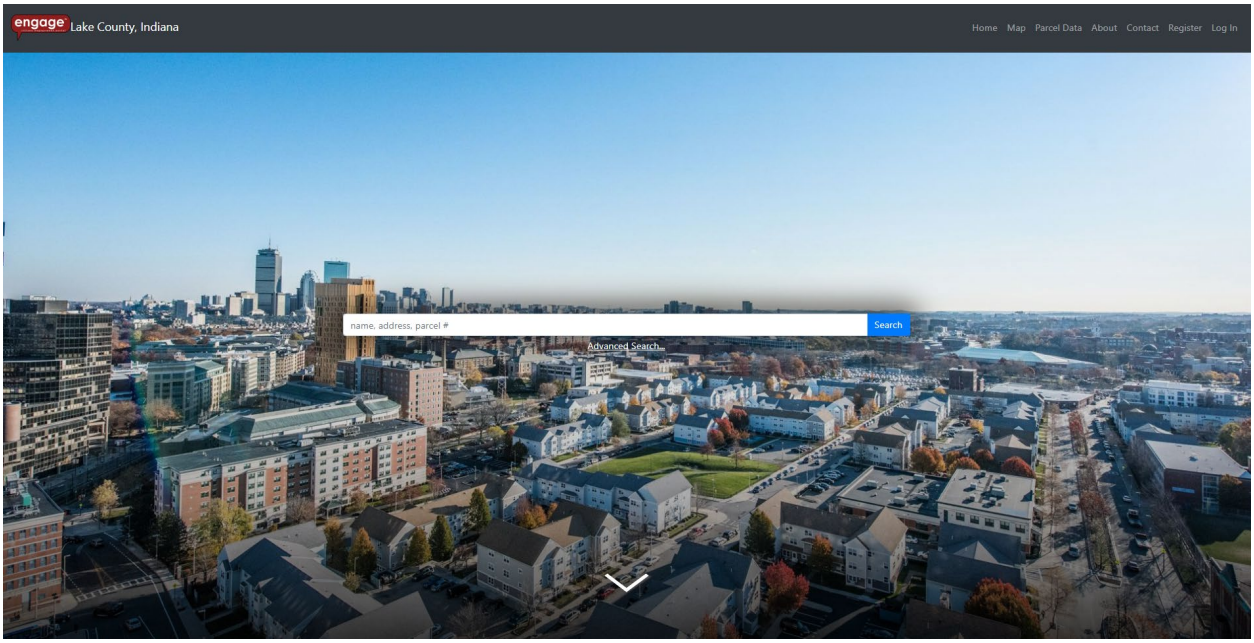
Navigate

There are 3 pages on the website that allow you to navigate through data, they are:

- Primary page
- Map page
- Parcel Data page

Primary page

When you first enter the ***engage***™ website, you'll land on the Primary page (shown below):

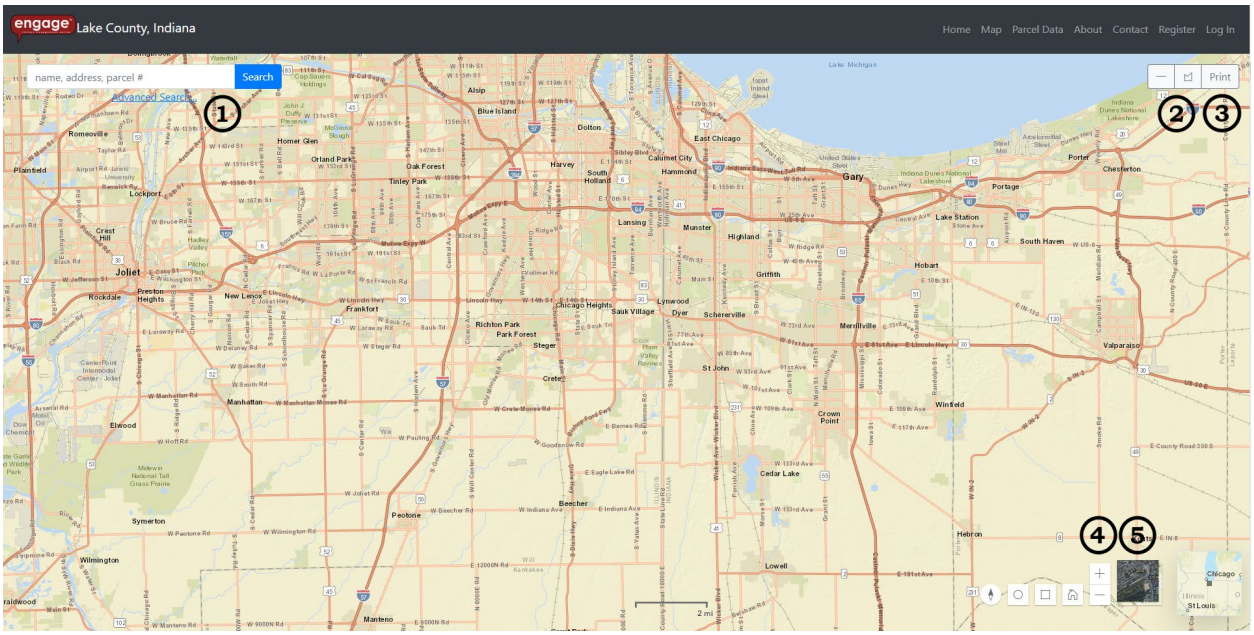


On the Primary page, you can navigate to other pages, such as; Map, Parcel Data, Contact, etc. by selecting the tab on the top menu bar. Or, if you just want to search for a name or address, you can simply enter that information into the search box, press Search, and let ***engage***™ do the rest!

TIP: As you use ***engage***™, keep your eye out for carats (aka arrows or chevrons). Carats expand / collapse windows to show / hide detailed information. For example, the carat at the bottom of the Primary page expands the page to show more information about the county.

Map page

The Map page provides a variety of tools you can use to search, measure, print, zoom, etc.



1. Search
2. Measure
3. Print
4. Zoom in/out
5. Layer control

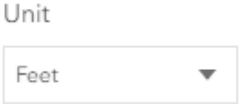
Search

Just like searching on the Primary page, you can search on the Map page. Simply enter information (name, address, parcel number) into the search box, press Search and let ***engage***™ do the rest!

Measure

With ***engage***™, you can measure between points (2 or more) or you can measure an area. To measure between points, select the "measure line" icon: . To measure an area, select the "measure area" icon: .

TIP: The default unit for line measurement is set to "feet" and for area measurements it's set to "acres". After you finish measuring, you can change the unit by selecting the Unit pulldown:



Print

The Print button allows you to print the map as it exists on the Map page. Printing is automatically formatted to fit 8 ½ x 11 paper. However, through the print settings, you can select other paper sizes depending on the capabilities of your printer.

Zoom in/out

The zoom in/out tools, , incrementally adjust the scale of the map. The "+" button zooms *in* and the "-" button zooms *out*.

TIP: If you're using a mouse with a scroll wheel, you can dynamically zoom in/out with the mouse wheel.

BONUS TIP: You can define the area to zoom into. If you hold the "Shift" key, click the left mouse button to drag a box defining where you want to zoom. When you release the left mouse button, the map will zoom into the area you've defined.

Also, you can scroll using the mouse. Click and hold the left mouse button on the map and drag the map left/right/up/down. Release the left mouse button when you're done scrolling.

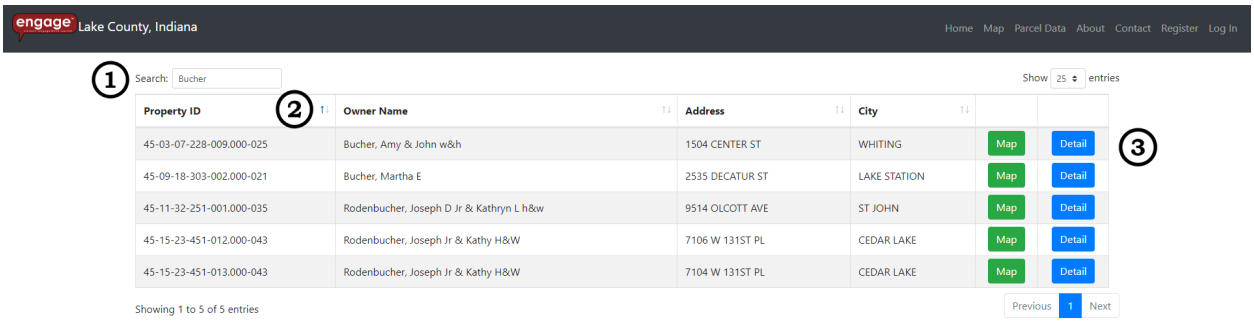
BONUS TIP: You can rotate the map. Click and hold the right mouse button on the map and rotate the map 360 around the point where you've clicked. Release the right mouse button when you're done rotating the map. To reset the map with North at the top of the map, select the compass icon:

Layer control

As a focused application, ***engage***™ has been designed to be very specific to the property tax and assessment industry. Because of this, we've simplified the layer control to include only two options to use as a basemap; streets or imagery. Regardless of the basemap you select, once you've zoomed into a predefined map scale, the county's parcel boundary map will overlay on top of the basemap you've selected.

Parcel data page

The Parcel Data page provides a variety of tools to search, sort, download, etc.

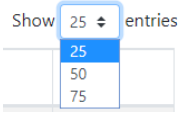


1. Search
2. Sort
3. Detail

Search

Like searching on the Primary page, you can search on the Parcel Data page. Simply enter information (name, address, parcel number) into the search box. Once you've entered information, press "Enter" on your keyboard and let ***engage*™** do the rest!

TIP: Although the default is to show 25 results per page, you can show up to 75 results per page via the pulldown in the upper right corner of the Parcel Data page:



Sort

The results of your search will automatically be sorted by Property ID from the highest to the lowest number. You can re-sort the results of any data category by selecting the ↑↓ button.

Detail

If you'd like view more information about a particular search results, click on the Detail button and you'll be redirected to a detailed parcel report, which contains Parcel ID information, neighborhood amenities, owner/transfer history, sales information, valuation history, land record information, the property sketch, property photos, and improvement information.

TIP: When you're viewing the Detailed Parcel Report, you can print the report by using the right mouse button and selecting Print (or Ctrl + P). From the print dialogue box, you can configure page settings, such as paper size, margins, print quality, etc.

Search

Chances are, you've come to the ***engage***™ website because you're searching for property assessment or tax information. So, how do you find what you're looking for? You can use a map to locate the property, or you can enter information into the search box and let ***engage***™ do the heavy lifting for you. If you use the search tool, you have two options; basic search and advanced search.

Basic search

You can access the basic search from a variety of places in ***engage***™; the Primary page, the Map page, and the Parcel Data page. While the basic search tool is meant to be simple to use, behind the scenes, ***engage***™ is working hard to provide you the results you're searching for. For this reason, you should try be as specific as possible to get the results you're looking for (e.g. if you're searching for John Smith, you'll likely get numerous results if you only enter "Smith" in the basic search). If you're not specific with your search criteria, ***engage***™ will still attempt to narrow down the search results for you, however, the results list may be a bit larger than you'd like.

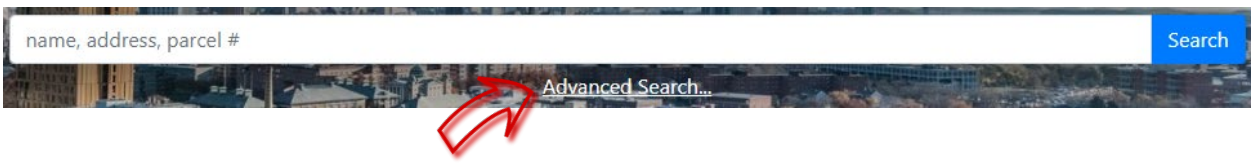
Are you looking for a street address? Just like searching for a name, the more specific you can be, the more ***engage***™ will be able to narrow down the search results (e.g. if you're specifically looking for 123 Main Street, you'll likely get numerous results if you just enter "123" in the basic search).

Advanced search

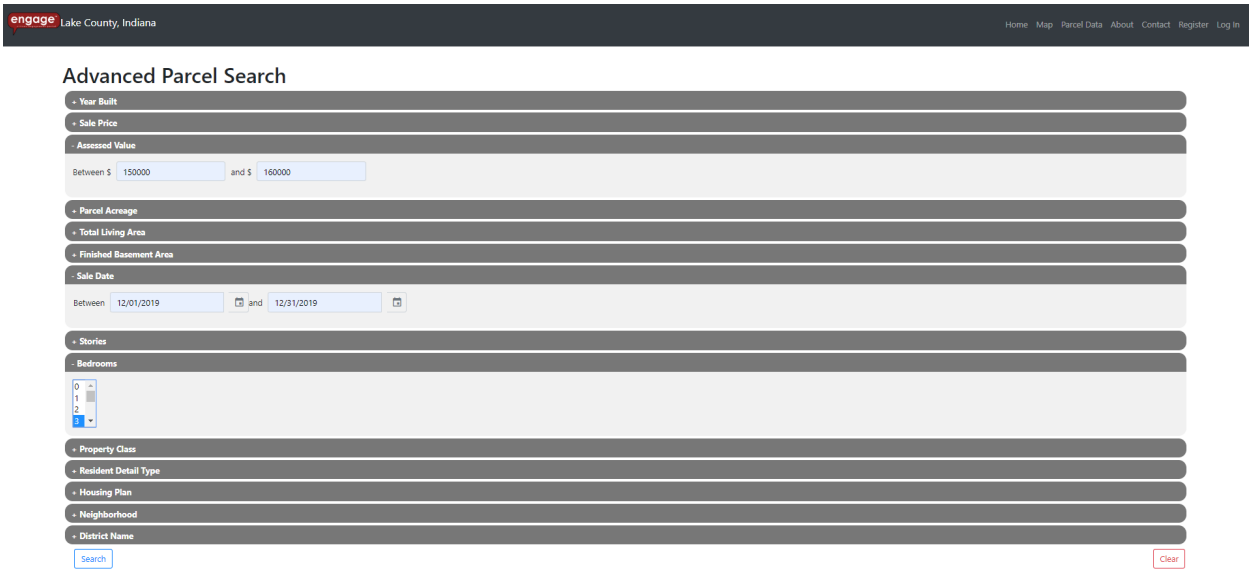
Not everyone is searching for simple stuff, like John Smith or 123 Main Street. Sometimes you might be looking for more complex information, such as:

All the 3-bedroom homes sold between June 1, 2010 and June 1, 2011 with an assessed value between $150,000 and $160,000.

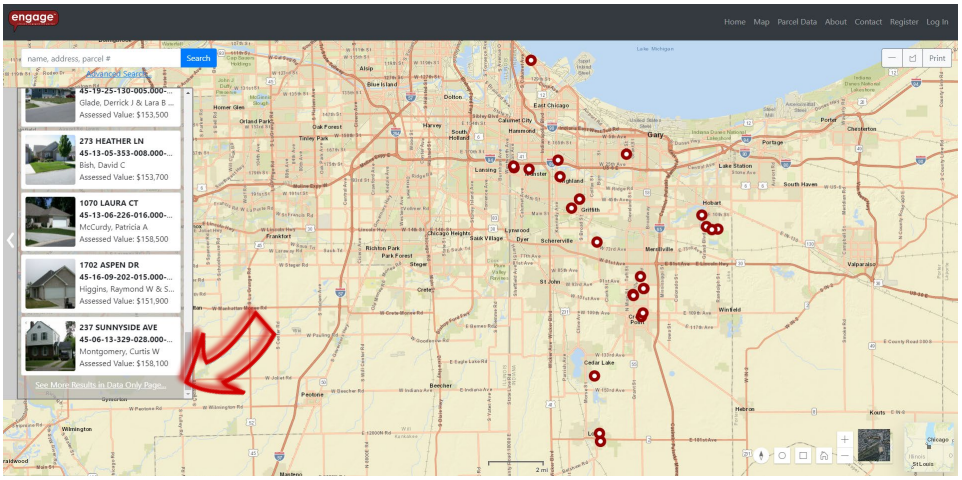
engage™ has the advanced searching tools you need for this type of complex search! Look below the basic search bar on the Primary page and you'll find the "Advanced Search" link:



Advanced Search… takes you to the following page:



Selecting the "+" symbol on any search criteria item expands the search criteria, allowing you to enter the specific criteria; between certain dates, between certain values, or a specific number, like the number of bedrooms. Once you've entered in the search criteria you're looking for, hit the Search button and ***engage™*** will do the rest.



TIP: After you complete either a Basic or Advanced Search, ***engage™*** will display the results and location on a map. These results are limited to a maximum of 25 results. More than this and it might become visually difficult to see on a map. If your search results exceed 25 results, you may want to consider viewing the information on the Parcel Data page. Don't worry, you don't have to redo your search, if you scroll down on the results on the Map page, there's a link to take you directly to the search results on the Parcel Data page.

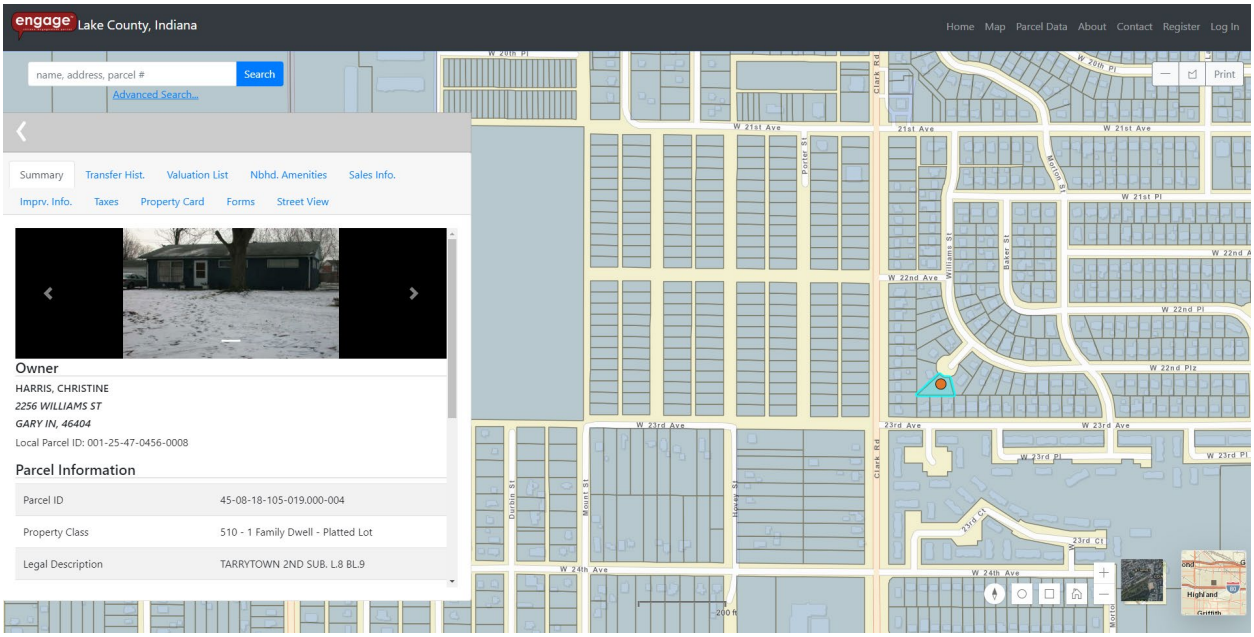
BONUS TIP: There's no need to fill out every search criteria option. With Advanced Search, if you want, you can fill in only one search criteria, such as Sale Price.

Select

Let's assume you've come to the ***engage***™ website to search for property assessment or tax information and you want to use the map to "select" a certain parcel or maybe a group of parcels. So, how can you do this? Well, you've come to the right place because ***engage***™ allows you to select one or many parcels, using some simple tools.

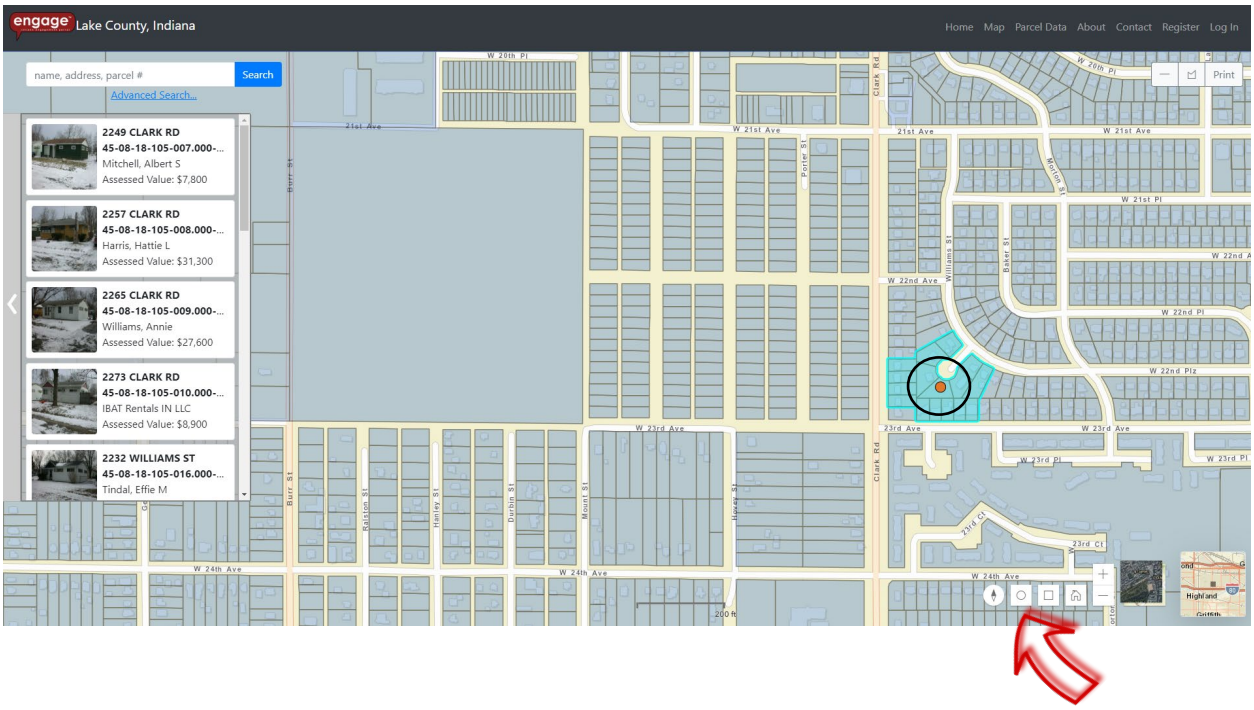
Select a single parcel

First, make sure you've located the property by zooming into the map until the parcel layer is visible, like below. Then, click the left mouse button once on the property. ***engage***™ will highlight the parcel boundary light blue and then display the property information for the highlighted parcel:



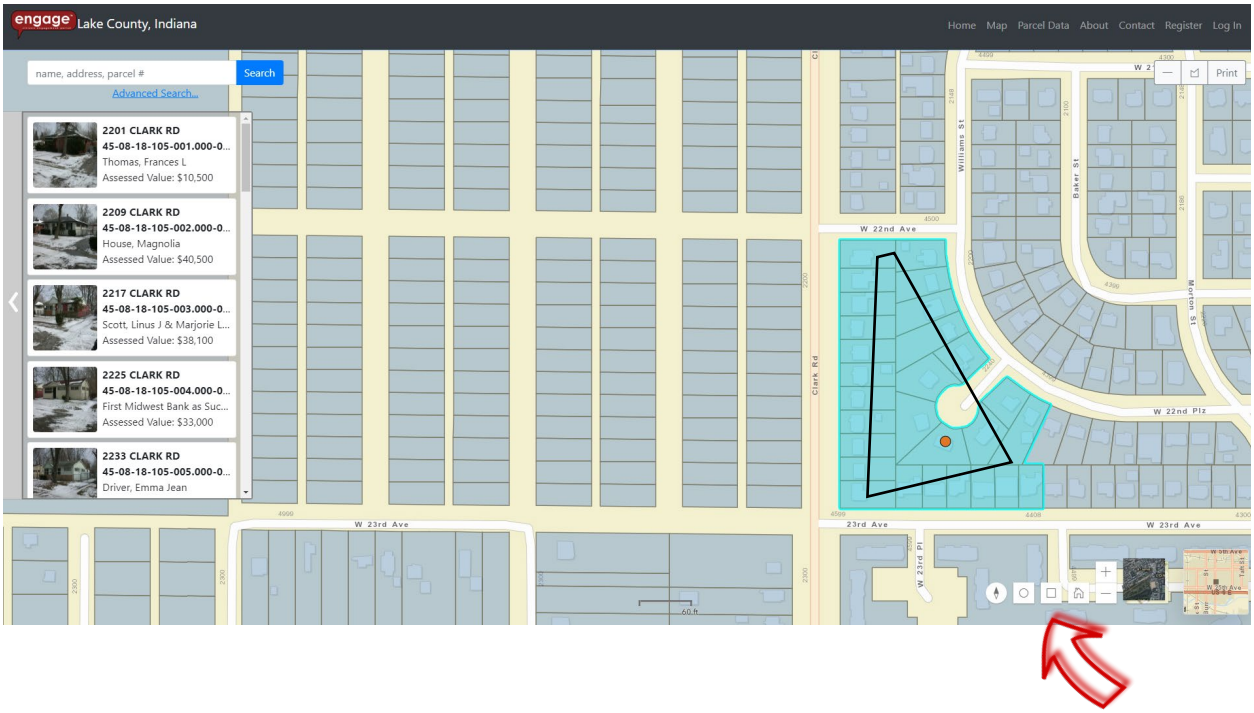
Select a group of parcels within a radius

What if you're searching for a group of parcels within a certain radius of your property? First, just like selecting a single parcel described above, you'll want to make sure you've zoomed into the map until the parcel layer is visible, like below. Then, use the "select by circle" tool and your results will be highlighted on the map:



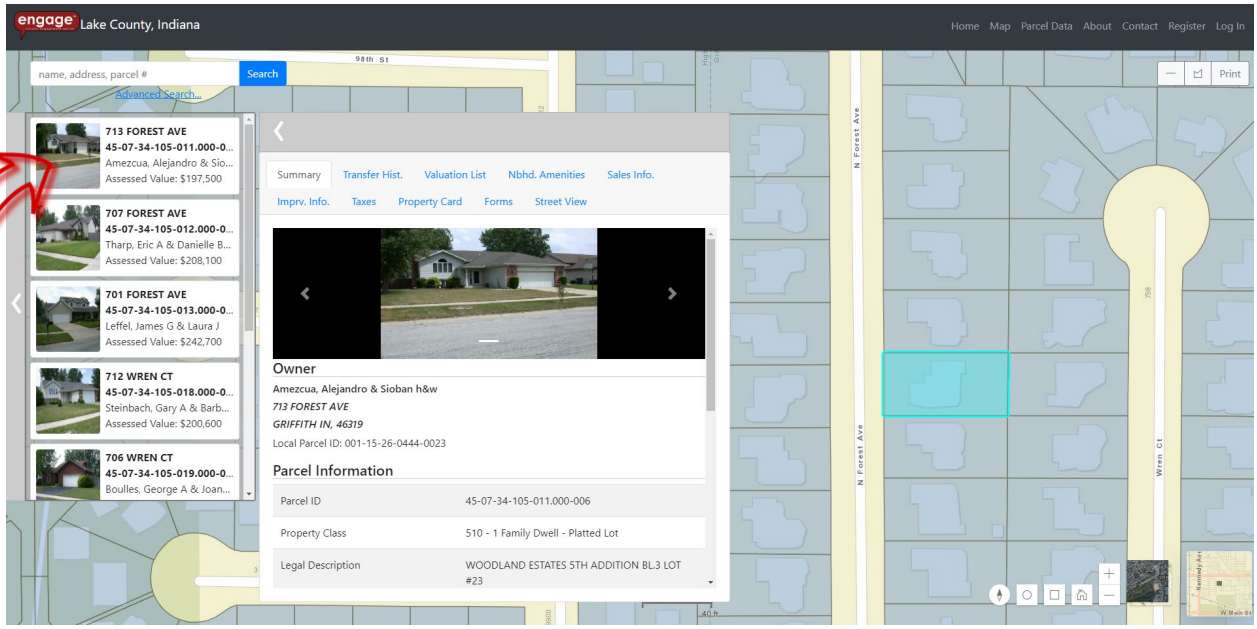
Select a group of parcels within a boundary

What if you're interested in a group of parcels within a certain, irregular shaped boundary of your property? After you've zoomed into the map until the parcel layer is visible, use the "select by polygon" tool and your results will be highlighted on the map, like below:



View

After you've selected a parcel, or group of parcels, you can view more information about your selection by clicking on the thumbnail from the selection results on the left side of the map window:

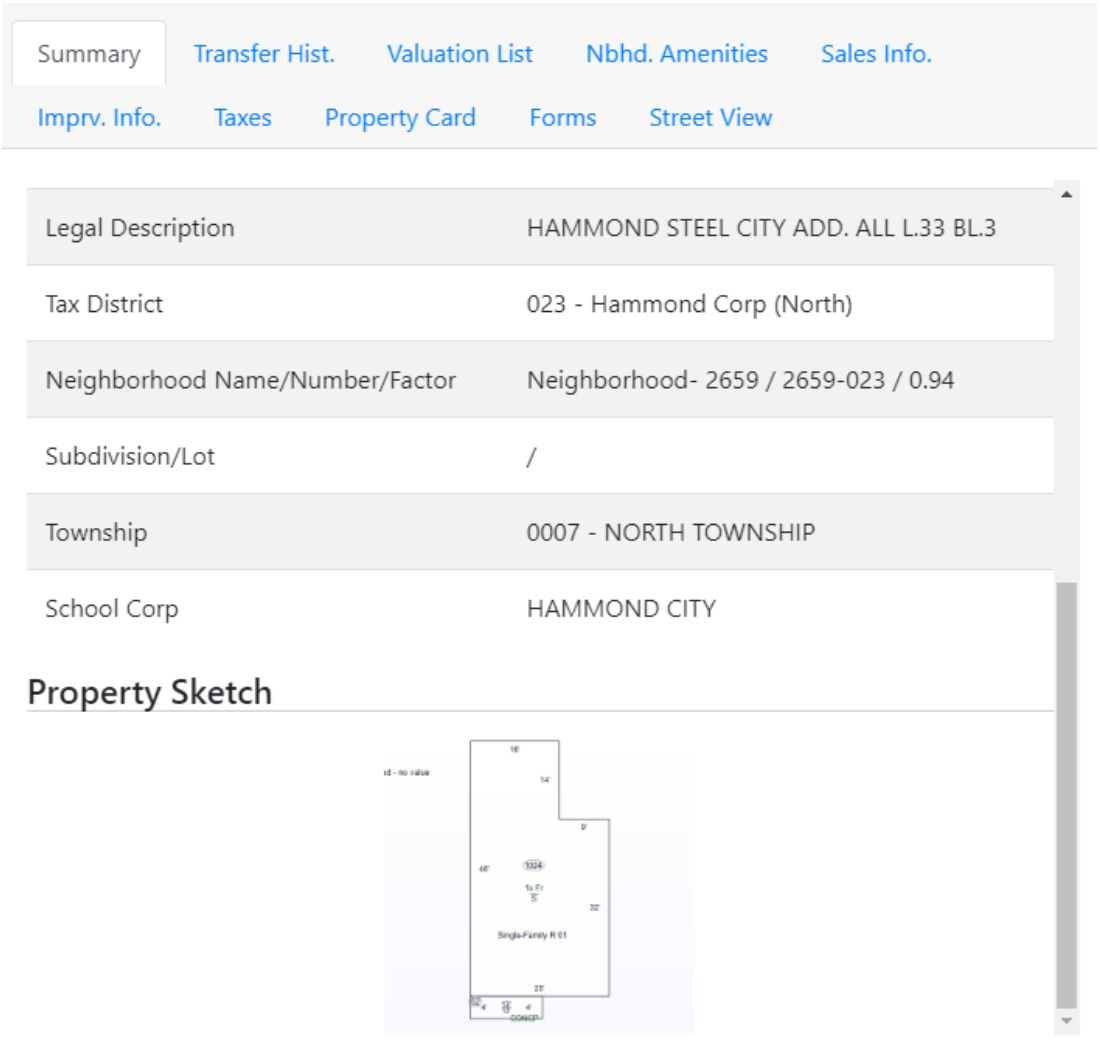


When the thumbnail is expanded, a new view of the information is provided, with a variety of tabs detailing additional information about the selected property:

- Summary
- Transfer History
- Valuation List
- Neighborhood Amenities
- Sales Information
- Improvement Information
- Taxes
- Property Record Card
- Forms
- Street View

Summary

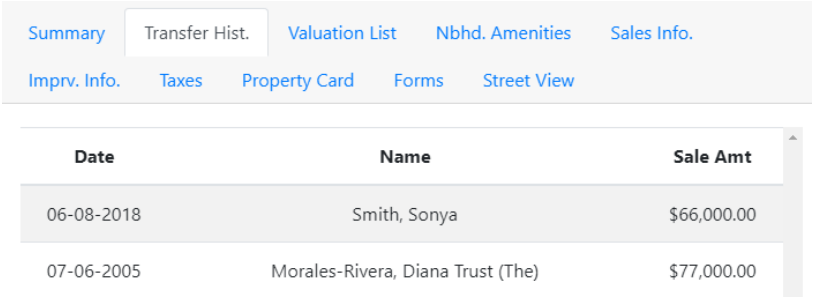
From the Summary tab, you can scroll through photos of the property (if available). You'll also find information such as the owner, parcel ID, legal description, tax district, township and school corporation. The property sketch is located at the bottom of the Summary tab, like shown below:



TIP: If you click on the property sketch, it'll expand into a larger view, allowing you to see more detail.

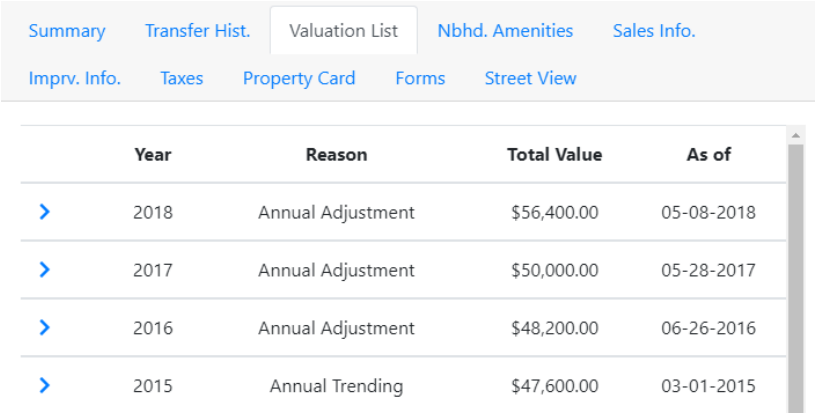
Transfer history

Here you'll find information about previous owners (if any), when the property transferred from one person to another and the sale amount, like shown below:



Valuation list

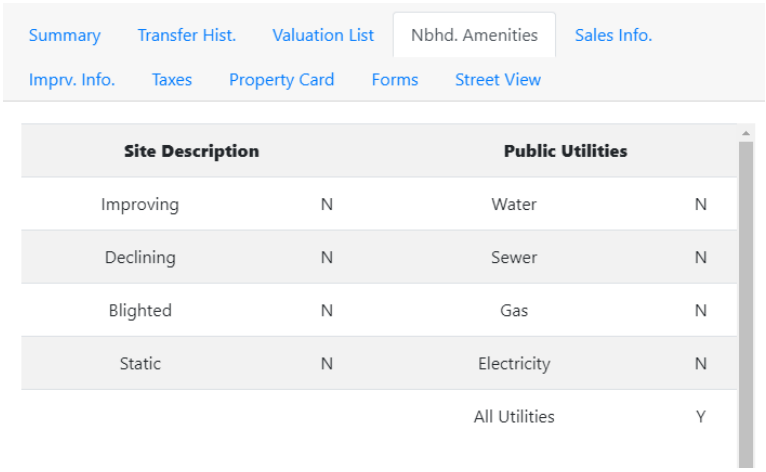
The valuation list includes a year by year history of the property value, like shown below:



TIP: Don't forget, you can expand the information by clicking the › (aka carat), like previously described on *page 4* of this User Guide.

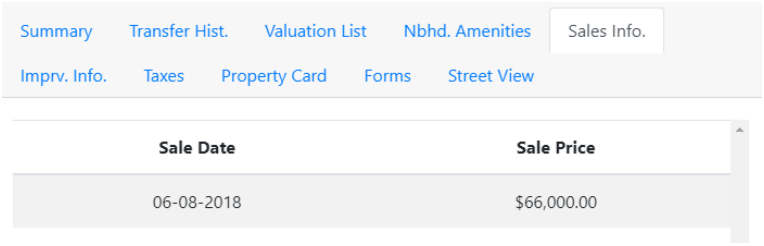
Neighborhood amenities

Neighborhood amenities describe the characteristics of the property, such as; are public utilities available? Is the neighborhood blighted? Like shown below:



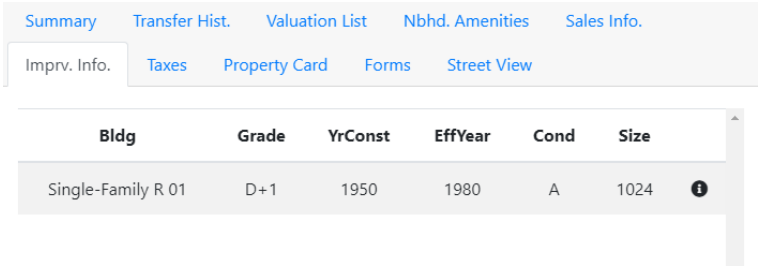
Sales information

Sales information includes the sale date as well as the sale price, like shown below:



Improvement information

Here you'll find a summary of the structure(s) on the property, such as its grade, the year it was constructed, its condition, and its size, like shown below:



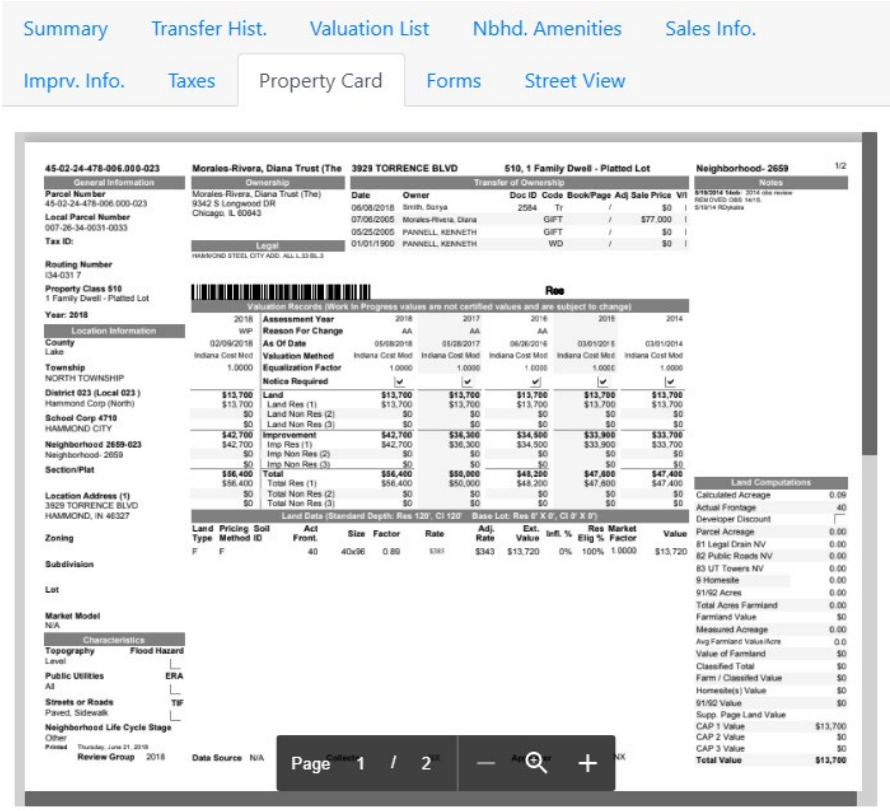
TIP: If you click on the ⓘ button, expanded detail will appear, providing much more information about the structure, such as; # of baths, # of bedrooms, # of fireplaces, heat type, size of attached garage, etc.

Taxes

The Taxes tab requires integration with **XSoft's® *INtax*™** software. If you don't see a Tax tab in your version of ***engage*™**, or if there is minimal tax information provided in the Tax Tab, it means the County uses software other than ***INtax*™** for property tax billing and collection.

Property record card

This tab displays the Property Record Card directly within ***engage*™**. You can use the embedded viewing tools to zoom in/out and scroll around the Property Record Card. Or, you can download the Property Record Card and print it or save it for later.



Download here

Forms

On the Forms tab, you'll find a variety of forms made available in ***engage*™**. By selecting an *interactive form* from the list, you can enter your own information and then print it or submit the form online for review and approval.

Obviously, some forms are more complex than others (e.g. they require a fee, or multiple review agencies are required to provide approval, or they require a signature, etc.). These more complex forms may not be available in ***engage*™** at this time; however, we're already working on

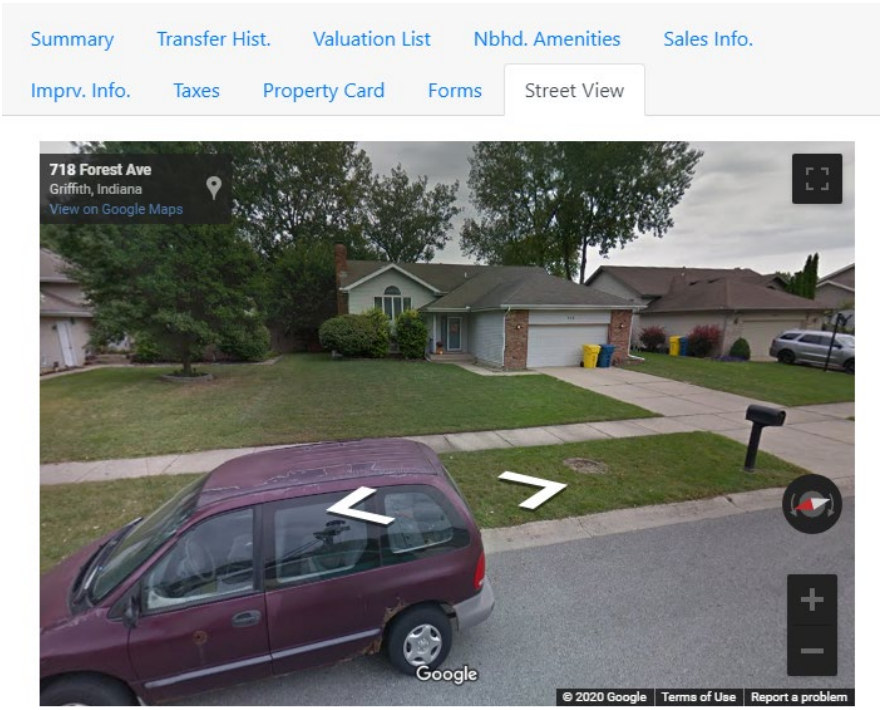
features to incorporate numerous other forms, regardless of their complexity. These features will be added to ***engage™*** in a future release.

TIP: Be sure to check out the "Cool Stuff" section of this user guide for helpful hints about Forms.

Street view

Chances are, you've probably already used *Google Street View* in some other application, like *Google Maps* (www.google.com/maps). You may have zoomed into an address and then clicked on the *Google Street View* icon to view a location at the street level, like below:

With ***engage™***, we've incorporated *Google Street View* as its own tab within the application. So, you don't have to leave the ***engage™*** site to view *Google Street View* images, as shown below:



TIP: Using the Street View tab in ***engage™***, you have full control of *Google Street View* via the embedded tools within the application, you can rotate the image 360 degrees or move up/down the street to view other images along the way.

BONUS TIP: The Street View tab within ***engage™*** is intended to keep you from having to leave the ***engage™*** site to access other data, such as *Google Street View*. However, we realize that sometimes a larger view is necessary. For this reason, the icon within the ***engage™*** Street View tab expands the Street View window to be the full size of your screen. When you're done, pressing the Esc key takes you back to the normal Street View tab.

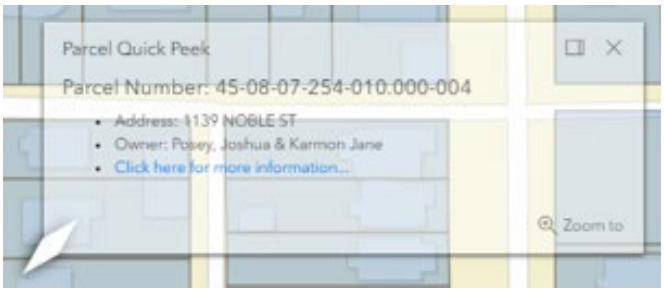
BONUS TIP: The Street View tab within ***engage™*** relies on the street level imagery being available in *Google Street View*. If you don't see imagery in the Street View tab, it means that imagery does not yet exist in *Google Street View*.

Cool Stuff

As mentioned previously, ***engage***™ was designed as a cloud application and is intended to be intuitive. If we've done our job properly, you shouldn't need to use this guide for too much direction. That said, there are some not so obvious, but cool features within ***engage***™, which we want to make sure to point out.

Parcel quick peek

On the Map page, once you've zoomed into a level where the parcel map is visible, if you hover over a parcel with your mouse, a semitransparent window will appear with summary information for the parcel you're hovering over (parcel number, address, owner name):



You can dock this window in the upper right corner of the map or click the link to see the full parcel report.

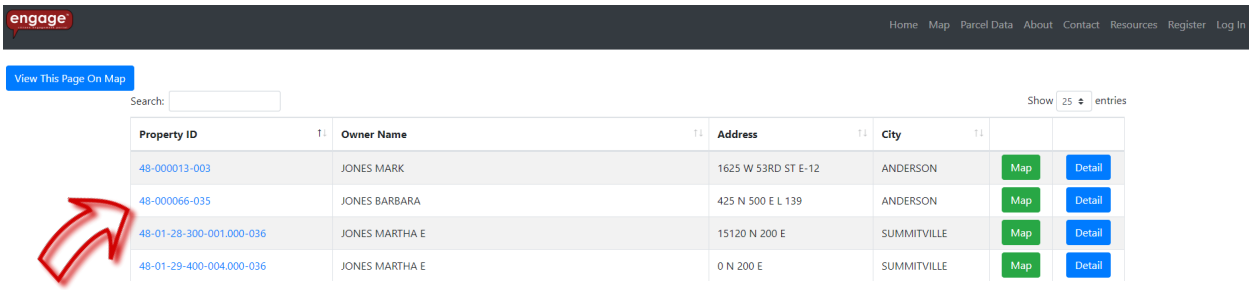
Interactive forms

You may have noticed earlier in this guide, when we discussed forms (p. 18), that we used the term *interactive form* and you might be wondering what this means for you. Because you're using ***engage***™, which is fully integrated with ***INcama***™ and ***INtax***™, we have access to a lot of information about the parcel and we can pre-populate portions of the form with the information we already know, such as owner name, address, parcel ID, legal description, etc. This means you will have less information to manually enter on the form and less chance for errors.

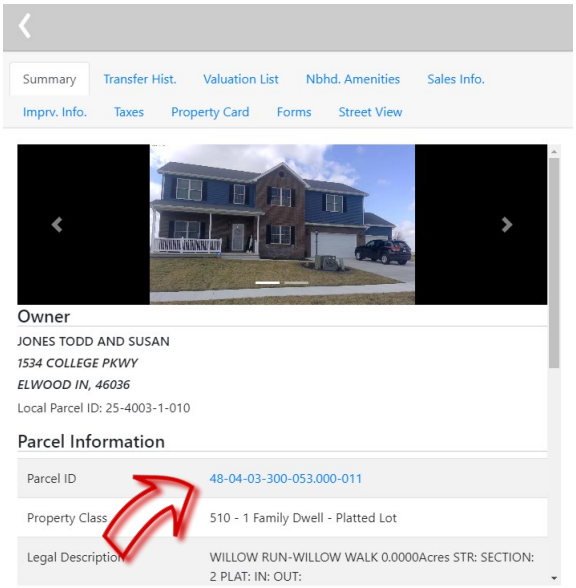
Hyperlinks

Because the Property Record Card is an important document associated with each parcel, we've included hyperlinks to make accessing the Property Record Card easier than ever. When you see the Property ID number in **blue** text, clicking on the text (a hyperlink), will take you directly to the Property Record Card for that Property ID number. Two examples are shown below:

Hyperlink on the Parcel Data page:



Hyperlink on the Summary Tab:



User registration

***engage*™** doesn't require a username and log in to access the site and view data. However, when performing certain functions, such as downloading data or submitting forms, you are required to create a user account. This simple process only requires a valid email address and password.