

User Guide

for

E-Reg

An Internet Renewal System utilizing Local Data



22 Tater St. Ext
Mont Vernon, NH 03057
(603) 673-7155
(603) 673-0442 Fax
www.interwaredev.com

TABLE OF CONTENTS

Citizens Process	1
E-Reg Main Screen	1
Renew by Plate.....	1
Renew by PIN	2
Review the E-Reg Shopping Basket	2
By Mail.....	2
E-Check.....	2
Thank you for Choosing E-Reg.....	2
Quotes.....	2
Municipal Process	3
Synchronize Data	3
Edit Log & Approve.....	3
Print Checks	4
Print E-Reg Log.....	4
EB2Gov on the Web	5
Change Profile.....	5
Reports	5
Join ENotification List	6
Technical Set Up	7
E-Reg User License.....	7
Create E-Reg Transaction Codes	7
Distribute EC and ER to Plate Master.....	9
Set up the System Files	10
Set up Passwords.....	10
New E-Reg Tables	10
New Reports.....	11
Install MICR Fonts.....	11
Printer Set Up Review	11
Synchronize the Data.....	11
Set up the profile	11
Supply the link informatin for the town/city index page.....	11
Review the Documentation with the customer.....	11
E-Reg Links Document.....	12

E-Reg User Guide

Interware Development Company Inc.
22 Tater Street Ext.
Mont Vernon, NH 03057

Phone: 603-673-7155
Fax: 603-673-2241
Email: srowe@interwaredev.com

Released in April of 2004, E-Reg is a Web Based add-on for ClerkWorks Motor Vehicle system. E-Reg provides the means for citizens to enter their vehicle renewal information over the internet and choose to pay online. Town Clerks and City Tax Collectors request this data to then process the registration. The internet updated information is provided to the ClerkWorks Motor Vehicle Software or a standard file lay out for clerks to process on any other local software they may be running.

Interware Development Company maintains a powerful server which resides at G4 Communications lock down facility in Manchester, NH. This EB2Gov server maintains a subset of the municipal data as well as collects the data from the citizen.

CITIZEN PROCESS

The participating municipality's citizen would simply launch an internet browser from their home, office or local library computer to access the Towns' Web Site or www.ereg.us. The E-Reg Logo would appear directly on that Web site with a link to the server site where the data resides.

E-Reg Main Screen

The Main Screen of E-Reg is laid out for easy access to the advanced user and provided additional information to users that are new to the system. Areas can be clicked that provide links for additional information.

Some of the Information material provided on this first screen including:

- Step by Step process description**
- Take a Test Drive**
- Get a Quote**
- Sample of Registration providing the location of required data**
- Frequently asked questions**
- Privacy statement and Contact us**
- Opt-Out procedure**

At the E-Reg main screen the citizen is presented with two options to perform their renewal:

- Renew by Plate**
- Renew by PIN**

To **Renew by Plate** the citizen should have his current registration in hand and enter his/her email address as well as the following information into the provided spaces:

- Plate No**
- Plate Type**
- Primary DOB (mm/dd/yyyy)**
- VIN (Last 4 Digits)**

To **Renew by PIN** the citizen will have received a Mail In Notice from their Town Office listing the vehicles scheduled to be renewed on one sheet of paper with a PIN Number. In this case the citizen simply enters that PIN. If the citizen receives two notices then two PINs can be entered at the same screen to combine the two Mail In Notices he/she may have received.

Review the E-Reg Shopping Basket

Once the Plate information has been entered or the PIN has been entered a list of the vehicles is presented to the citizen. The citizen then has the option to Delete any of the transactions listed, Add another Transaction, and view the total charges to the Town/City and the State. A check off box prompting the citizen to Notify me by Email Next Year defaults to

To complete the transactions listed the citizen may be presented with two payment options. Payment options are at the discretion of the municipality.

By Mail E-Check

If **By Mail** is chosen the citizen will be presented with a Confirmation document instructing them to print and send in with their hand written check. Town/City specific information is provided on this confirmation including the address, phone number, hours and a special message entered by the municipality. Return check policies are printed for both the municipality and the state.

If the option **E-Check** is checked off the next screen will appear to guide them through the process of entering their checking information. A full sample of a check is provided to offer assistance to find the Account Name, Routing Number, Account number. The citizen will then actually see a picture of their checks on the screen. One for the Town/City and one for the State with all the following information for them to confirm:

Plate numbers
Totals
Bank Name Address and phone number
Name on the Account

Thank you for Choosing E-Reg

The final page of the citizen process Thanks them and asks them to take a survey which the Town/City offices can review comments and the results of. An EMail confirmation will be sent to the citizen immediately listing the vehicles and amounts of the E-Reg transaction just performed.

Quotes

We are pleased to provide the ability to receive a quick and convenient quote for vehicle registration. In the Profile on EB2Gov.com a participating municipality has the option to check off the box next to Quotes.

There are two ways to get a quote. The citizen can get quotes by **Plate No** where they may get quotes for up to 5 vehicles at a time or they may get a quote by **vehicle**. By Vehicle estimates are requested via a series of option buttons for the citizen to choose from and boxes provided for them to enter the list price, the year of the vehicle, the Owners Date of Birth or Corporate Name and the weight of the vehicle.

The disclaimer is clearly stated: "The fees calculated are subject to change and may vary depending upon how and where you complete the registration process. On-line quotes are not guaranteed!"

MUNICIPAL PROCESS

The participating municipality will perform the registration as they normally do. Additional processes are required prior to that which includes synchronizing the data, approving the logs and printing the checks. The addition of the check printing requires the office to maintain a laser printer, MICR ink and check stock (provided by Interware).

All ClerkWorks users will have a license to perform E-Reg which will reveal another Main Menu item called E-Reg. The E-Reg Main Menu drop down from within ClerkWorks will include the following options:

Synchronize Data
Edit Log & Approve
Print Checks
Print EReg Log
EB2Gov on the Web

Synchronize Data is the first listed and the first step in the municipal process. This utility will access the EB2Gov Server in Manchester and exchanges data. Follow these steps to synchronize your data:

- 1.) From the Synchronize Remote Data Screen Click on the **Refresh Bar**
- 2.) At the bottom right of the screen press **Synchronize**

A subset of the local municipal data that has changed since the last time the data was synchronized will be transmitted up to the server via the internet with 128 bit encryption. At the same time the citizen data requesting renewals will be retrieved and updated to a set of local files. Technical information about these separate files is in the Technical section of this document.

Whenever there is a change to the set up to ClerkWorks, registrations requested online or registrations completed at your office you should synchronize your data. You can not synchronize too much and should make a habit of synchronizing at least once a day if not more.

Edit Log & Approve is where all the E-Reg information is collected can be reviewed and must be approved. To approve:

- 1.) **Click on the box** on the same line as the name you wish to approve

In the EB2Gov Log Editor users can choose to look at the listing of E-Reg customers by Pay Method and the following Status:

All - Each and every status type will be displayed
Confirmed - Only the logs that have been approved by the clerks will show on the list
Pending - Logs that have not been approved yet will be displayed
Processed - Only the logs that have been approved, checks printed and registrations performed will be displayed

When a name is highlighted the two tabs at the bottom of the screen, Transactions and Log Detail, will display detailed information. The citizen's bank name and phone number are displayed at the bottom of the screen with detailed banking information available from a drop down menu upon a **right click on a highlighted name**.

The **Confirmation field** is used to display to the clerk the status of the checking account number. If E-Reg could confirm the checking account the citizen entered is correct the word VALIDATE will appear in this column. If E-Reg could not confirm the checking account number the word UNVALIDATE will appear. At this time technology does not allow all account numbers to be validated and the clerk has the option to validate the checking account number directly with a phone call to the bank.

The **Approved** check box requires the clerk to actually approve the transaction to occur by manually checking off this box. Before this is done the checks can not be printed and the registration can not be performed.

The **Check Printed** check box is automatically checked off after a check has been printed. Although the Print Check utility does have a reprint option, users also can uncheck this box and in the Print Check utility simply print the check again as though it had never been printed.

Print Checks will bring up the EB2Gov Print Check screen where there are the following print criteria for users to utilize to get the exact results necessary. Once initially set by the user the system will save this set of criteria for the next time checks are printed.

Check Status - There are two choices for the Check Status. The first choice, **Print** can be set to Print those checks that have never been printed and do not have a check in the box in the Edit Log & Approve screen. The second choice is **Reprint**. Reprint is used in connection with a Log Number and when there is a check in the box in the Edit Log & Approve screen.

Approved By - All – This can be chosen to print all those checks that have been approved by any authorized user of ClerkWorks. You can also **Select** to print by a particular user. In this case an ellipse will appear in the additional field next to the Select criteria which when used will display all the users that have ever approved an E-Reg log.

Auto-assign Check Number - This criteria can be used when pre-numbered checks are being printed, otherwise, it defaults to Select and the system automatically assigns consecutive numbers to each check printed. After the checks have been printed the field next to the Select criteria will contain the next number that will be assigned to the Town Check. The default assigns consecutive check numbers i.e., check number 1 to the Town Check and check number 2 to the State Check.

After the checks have been spooled to the printer the message "Please wait until all checks have been printed and press YES if all checks printed or NO if you need to reprint checks". This will give you the option to reprint right from here if your printer fails, jams or printed incorrectly on the check stock for any reason.

When the print criterion has been selected in the EB2Gov Print Check screen choose the **Print** bar at the bottom of the screen to bring up the Crystal Common Dialog Screen. Here you will choose the report name EB2GovCheck.rpt or use the little yellow open file folder to navigate to the ClerkWorks Reports directory where you will find EB2GovCheck.rpt. Make sure you choose the correct printer where the check stock and MICR ink is located.

Print EReg Log should be printed and retained for your records in a separate E-Reg folder. The check stubs can be stapled to this log for auditing purposes. It is recommended that the print criteria be chosen as Status=All and Pay Method=All and narrow down the Date Range to the exact dates you are interested in retaining. This way you will be viewing the entire list of E-Reg's on your system for a particular date range.

EB2Gov on the Web is the last menu item listed on the E-Reg Main Menu Drop Down Menu. By choosing this, your system will go to the internet and access the EB2Gov server where you have the opportunity to log into a secure location where a host of features for the municipality are located. Only users with a valid user name and password to ClerkWorks will be allowed access to this area. This site can be accessed via any web browser from any location via <http://www.eb2gov.com>. Once logged into EB2Gov the following options include:

Change Profile
Reports
Join Notification List

Change Profile is where the Town Clerk or the City Tax Collector maintains the services, prices, billing email address, generic messages and the towns return check policies. To Accept E-Check, Accept Credit Cards, Allow Quotes, Allow Mailins simply check of the boxes that you want to allow your citizens access to. If you are a Municipal Agent the state addendum to the Municipal Agent Contract mandates that Validate Checks is used. So if you are a Municipal Agent this must be checked off.

The **Convenience Fee** is charged on each transaction. The amount in this field will include a fee due Interware and may include any other amount the municipality may want to charge per vehicle requested by the citizen to be renewed on line. Interware's current charge is set at \$1.50 unless the Town/City is subsidizing this fee through the Interware contract by paying an annual amount. The municipality can add onto this fee any amount authorized to do so. The Transaction Code Master in ClerkWorks will be set up with a new code called EC to automatically place the funds into the correct General Ledger accounts. (See Technical Set Up for more information on this.)

The **Log Fee** is charged one time per log. So no matter how many vehicles are added to a particular transaction this charge will only be charged once. When the renewals are produced this fee will be reflected on the first renewal done within this log. Currently, this charge reflects the account verification charges and may include any amount the municipality may want to charge per group of transactions (logs) to cover the cost to mail back the registration, check stock, etc. The Transaction Code Master in ClerkWorks will be set up with a new code called EL to automatically place the funds into the correct General Ledger accounts. (See Technical Set up for more information on this)

If an email address is entered into the option **Send Log Receipt Copies** to the system will provide the email notification every time a citizen completes an E-Reg. This is done for further auditing purposes should the town/city require it.

Reports have three distinct areas in which users can view.

Show Logs This report will show logs based on a range of dates as well as the log status.

Status includes:

- **(C)onfirmed** - User completed the process and the log is pending synchronization by the city or town.
- **(S)ynchronized** - The record has been synchronized by the city or town.
- **(V)oid** - User did not complete the process and bailed out.

Survey Results

This report will display the results of the customer satisfaction survey the user is asked to complete when the transaction is completed or if the user aborts the process at some point along the way.

The results of the survey are broken out as:

- Town Code - Town or City code user logged in as
- Create Date - Date of the transaction
- Bail Reason - Reason user aborted transaction
- Comments - Comments concerning reason customer aborted transaction
- Experience - How the user feels about the overall experience entering the transactions
- Comments - Comments related to the experience
- Suggestions
- EMail - Click on this link to send the user an email
- Recommended - User enters a yes or no

Activity Report

The activity report will display EB2Gov Activity for all users including the number of logs and the number of transactions. The report can be pulled for a range of dates.

Join ENotification List offers the Clerks a way to get notified when a log is pending. If no logs are pending no notification will be generated. By joining this e-notification list, you will be notified of pending log records on the selected schedule. Choose each hour you wish to be notified. Feel free to sign up as many people as you would like to be notified.

Note: To be removed completely from the notification list, simply leave all hours un-checked. You will then be removed automatically.

TECHNICAL SET UP

A contract and the set up fee of \$ 95.00 for the account verification must be received by Interware before any customer can go live with E-Reg. Everything in this set up guide can be done in anticipation of the contract. The municipality has the control of when they are to go live by putting the link onto their web site.

The State DMV also requires an addendum to the Municipal Agent contract signed by the Municipal Agent and countersigned by DMV before the Municipal Agent can go live. This contract should be returned to :

DMV-Bureau of Registration
MA Help Desk Room 204
33 Hazen Dr.
Concord, NH 03304

One requirement of this contract is to have completed the Privacy Act Training course provided by DMV. Contact Kelly Michael kemichael@ safety.state.nh.us to sign up.

Contracts, links for the Web Master and additional services can all be accessed via :

www.ereg.us/signup

The installation of E-Reg consists of the set up of the local database by the software provider. This set up consists of the addition of two transaction codes, the replication of these codes to the plate master, set up of user names and passwords and a review of the system set up file to include the correct hours of operation, address and web address. New Data files to hold E-Reg data received by the citizen via the Internet are added to the Data directory. New reports are added to the Reports directory. Each one of these is described in detail below. We do ask that vendors setting these up do so in a consistent manner as stated.

E-Reg User License - All new ClerkWorks User Licenses are being created with E-Reg active. Older licenses will be provided to ClerkWorks vendors and must be put into the municipalities ClerkWorks Data directory. Rename the existing with the date included i.e. 0906_LIC111504.adt indicating this license was retired on November 15, 2004.

Create E-Reg Transaction Codes - Two new codes need to be created in Administration - > Transaction Code Master. The New Picture Icon will bring up the entry screen.

Code	EC
Description	E-Convenience Fee
Group	VReg
Source	MV
Flat Rate	1.50 (or if the town opts to include additional fees for each transaction on a log add it to this number)
Minimum	Leave at 0
UOM	Ea
Default Category	L (for Local)
Include on Registration	Check this off. This will print the code and the charge at the bottom of the registration
Fixed Distribution	Check this off if there is going to be more than one IN in the distribution.
UDF fields	Generally these can be set as all other MV transaction codes are set.
UDF fields	Generally these can be set as all other MV transaction codes are set
Type	IN
GL number	Should be the town liability account number "Due Interware"
Amount	Should be same as the Flat Rate above
Debit	0
Credit %	100
Type	PA
GL Number	Should be the town CASH account number
Amount	0
Debit	100
Credit %	0
*** Note	You may have more than one IN in the lower screen. IF the town wants to add an additional fees this is where it would be put

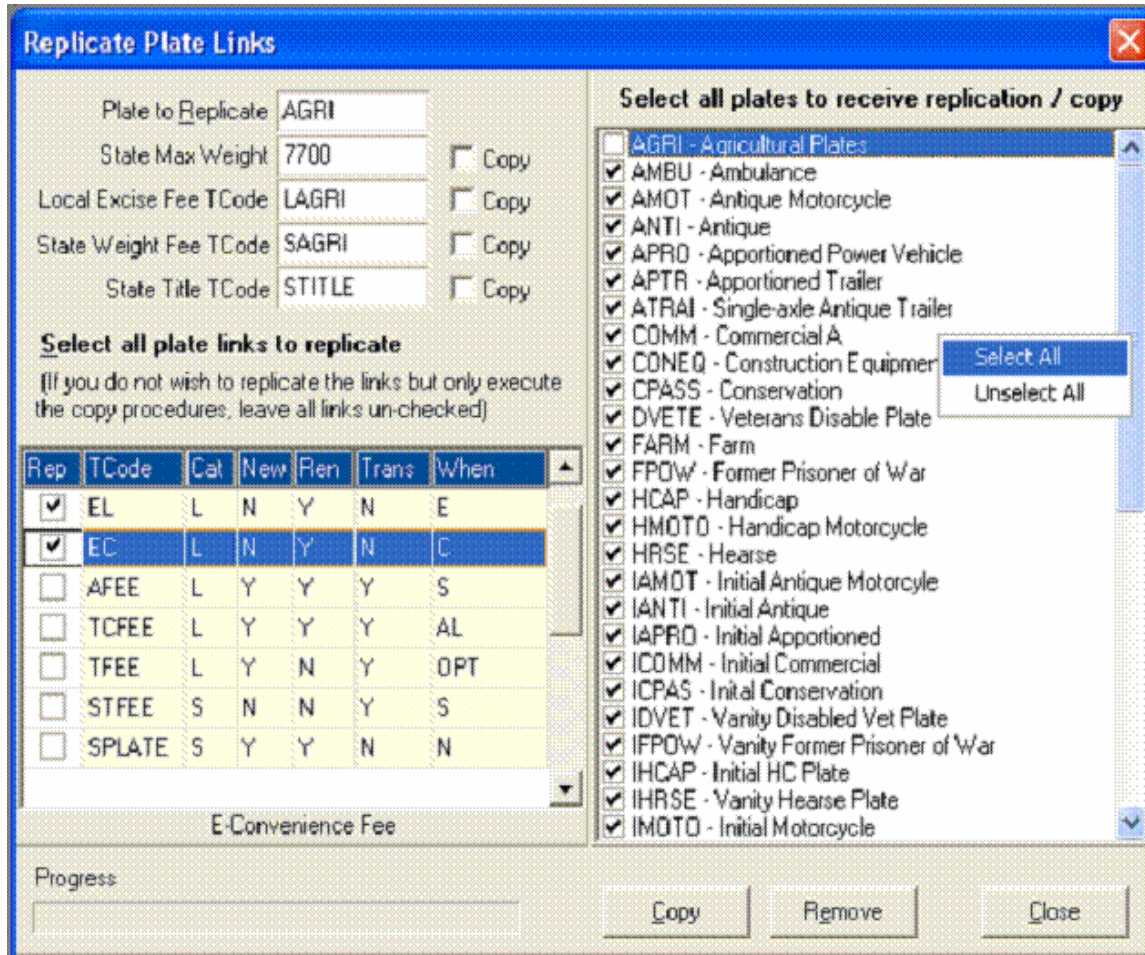
Code	EL
Description	E-Log Fee
Group	VReg
Source	MV
Flat Rate	.35 (or if the town opts to include additional fees for each set of transactions called a log add it to this number)
Minimum	Leave at 0
UOM	Ea
Default Category	L (for Local)
Include on Registration	Check this off. This will print the code and the charge at the bottom of the registration
Fixed Distribution	Check this off if there is going to be more than one IN in the distribution.
UDF fields	Generally these can be set as all other MV transaction codes are set.
Type	IN
GL Number	Should be the town liability account number "Due Interware"
Amount	Should be the same as the Flat Rate above
Debit	0
Credit %	100
Type	PA
GL Number	Should be the town CASH account number
Amount	0
Debit	100
Credit %	0
*** NOTE	You may have more than one IN in the lower screen. If the town wants to add on additional fees this is where it would be put.

Distribute EC and ER to Plate Master -

Set up one Plate in the Plate Master (AGRI) to add these codes to.

Other Fees						
TCode	LSO	New	Ren	Trans	When	All
EC	L	N	Y	N	C	N
EL	L	N	Y	N	E	N

Use the **Replicate Plate Links** utility located off the Administration drop down menu to replicate the **EC** and the **EL** TCodes to all other plate types. Right Click in white space of the “Select all plates to receive replication / copy” to reveal the mass check off feature. Select All will place a check in the box of each plate type. Then, simply press Copy after you have reviewed the criteria set up and the Progress bar will progress with a message when complete.



Set up the System Files - In ClerkWorks go to Administration and down to System. Here is where the town web site should be listed. Review the office hours and make corrections here if necessary.

Set up Passwords - In order to log into EB2Gov.com to maintain E-Reg a user must be set up in ClerkWorks with a password. This user name and password will be the same when logging into EB2Gov.com.

New E-Reg Tables -

There are 6 new tables required in the ClerkWorks/Data directory to hold E-Reg information. A zip file has been created EregDataFiles.zip and it will include the following:

- **ABA Banks.adt and adi**
- **EB2Govtrans.adt and adi**
- **EB2GovLog.adt and adi**
- **ERegSyncLog.adt and adi**

New Reports -

There are new reports that are necessary to print the reports required by E-Reg. A zip file has been created ERegReports.zip and it will include the following:

- **EB2GovCheck**
- **EB2GovLog**
- **MVAuditState**

Install MICR fonts - Download the following file from IDC ftp site MICR65.ttf and copy it into the ClerkWorks directory. Then go to the Windows Start button and to the Control Panel. Choose Fonts and Install New Font. Navigate to the ClerkWorks directory where the MICR65.ttf file is.

Printer Set up Review - A review of the laser printer that is set to print the checks. Make sure the MICR ink gets installed when checks are to be printed. The checks get set in the tray different ways depending on the printer type. If the MICR fonts are installed properly the ABA number and Checking Account number will be legible, otherwise it will have miscellaneous characters in this space.

Synchronize the Data - Not all fields and files are synchronized. For example the citizen address never gets synchronized to the EB2Gov server. After the initial synchronization the system will update only those records that have changed since the last time they were synchronized depending on the Touch_Date fields attached to each synchronizable record. The process to Sync the data the first time will be slightly different than the second time and all subsequent times. Follow these steps for the First Time ONLY:

- 1.) Highlight the Sync All Data Radio Button
- 2.) Press the REFRESH bar - all tables will get checked off except
- 3.) Enter special Dates for Vehicles and Licenses - It will not be necessary to synchronize all the data in the local data set. Choose a reasonable expiration date for both Registrations and Licensing; keeping in mind that E-Reg will not take a customers information if the registration is more than two months past the expiration date.

Set up the profile - The Profile is set up on EB2Gov.com. This should be carefully reviewed by both the Town Clerk or City Tax Collector and the vendor setting up E-Reg. The rest of EB2Gov can be reviewed at this time as well.

Supply the link information for the town/city index page - This information is available in a Word document or on <http://www.ereg.us/signup>. This should be supplied to the Town Clerk or Tax Collector for them to pass onto their Web Master or a person designated in the municipal office or by the municipality to upload information to the official Web Site. Keep in mind that once the town is live citizens can request renewals from the Town/City Web site or www.ereg.us and choose their town from the list.

Review the Documentation with the customer - It is important to review this documentation with the user of the system. They need to know that it is available and what information it contains should they need to refer to it at any time.

E-Reg Links Document

This is the final step in the set up for the municipality to “go live” with E-Reg. This should be done in coordination with the Town Clerk/Tax Collector when all is ready. This document can be provided to the Web Master for the Municipality.

The Town of Liberty’s Town Code: 998 (in these links below change 998 to your town code)

Link to E-Reg:

Supply link for municipal index page –

<https://www.eb2gov.com/scripts/eb2gov.dll/ereg/main?towncode=998>

Link to Quotes:

Quotes includes estimates for known plate as well as an area for citizens to enter the Year, Make, Model and the owner Date of Birth.. Towns can put a direct link on their site by using the following url:

<http://www.eb2gov.com/Scripts/eb2gov.dll/Ereg/ERegQuoteHome?TownCode=998>

Moose Picture Icon:

Please download from www.ereg.us/signup

Opt-Out option:

Supply link for citizens to opt-out. This would allow citizens to remove their information from the E-Reg Server if the Town chooses to offer this.

<http://www.eb2gov.com/scripts/eb2govadmin.dll/admin/GetERegOptOut?TownCode=998>

Link to E-Service Poll:

Put your town name in the place of Liberty to poll your customers for other e-Services to determine the public interest and to better serve their needs.

<http://www.eb2gov.com/Scripts/EB2GovAdmin.dll/Admin/TakeEServicePoll?TownName=Liberty>

Your web site should have a privacy statement:

If they would like to link a privacy statement, ours can be reached at

<http://www.eb2gov.com/admin/Privacy.html>

Interware Development Company, Inc.

-an information and technology software development firm.....

Sandy Rowe

srowe@interwaredev.com <<mailto:srowe@interwaredev.com>>

603-673-7155

603-673-2241 (Fax)