Drain Brain

Version 1.2

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Table of Contents

Introduction

Part I

1   Introduction

Drain Brain drain management software enables Municipal Drain Superintendents to quickly and easily:

- keep track of drains, properties, and projects
- quickly calculate prorated and special assessment charges
- produce expense reports and assessment schedules
- calculate and print tile loan payment schedules

To take full advantage of what Drain Brain has to offer, you should understand the relationships between drains, properties and projects. Each of these is described briefly in the following sections.

Drains

Drain Brain enables you to maintain a list of drains. Drain information includes the name of the drain, whether it is a main or a branch drain, and the by-law associated with the drain.

Properties

The property information maintained by Drain Brain includes the owner's name and roll number, as well as the address, location, and property description information for the property. This information can be entered manually or imported from the property tax roll.

Projects

Projects are used to maintain information about drain construction and drain maintenance. Drain Brain enables you to store a project name, starting and billing dates, contractor and by-law information, and a description of the project. Each projects also contains a list of expenses and a record of which flows are affected by the project.

Getting Started

Part II
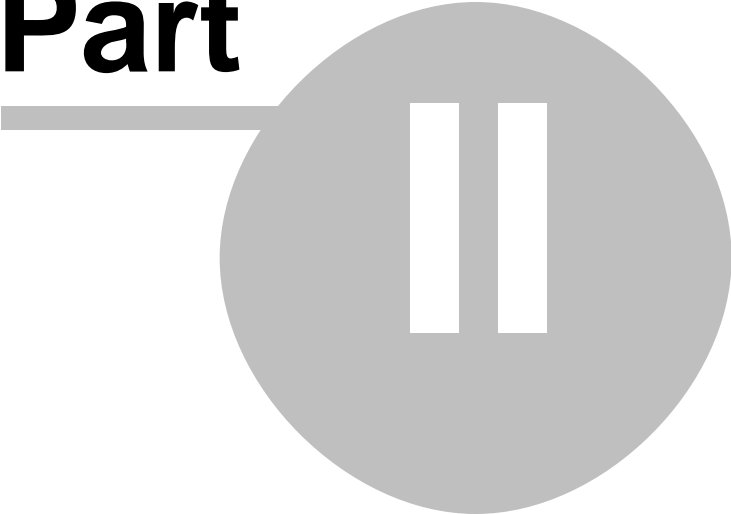
2 Getting Started

2.1 Logging In

When you launch Drain Brain from an icon or from the start menu, the first thing you see is the Drain Brain Login Form. You must enter your User Name and Password here to use Drain Brain.

The Login Form

2.2 The Main Form

Once you have logged into Drain Brain, you will see the Main Form.
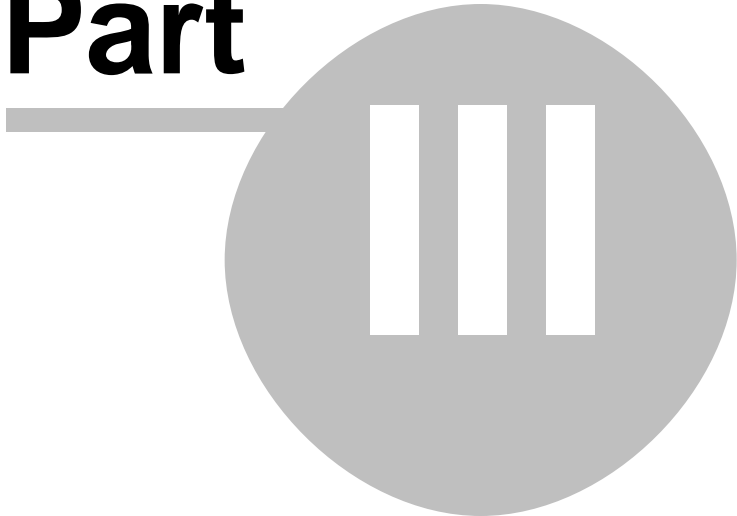
The Main Form

The buttons on the Main Form represent the following functions, from left to right: Configuration, Drains, Properties, and Projects.

The layout of the menus on the Main Form is:

Setup	Drain	Property	Project	Tile Loan	Help
Configuration	Drains	Properties	Projects	Tile Loans	About
	New Drain	New Property	New Project	New Tile Loan	Drain Brain Help
	Drain List	Property List	Project Definitions		
		Property List by Drain			
		Import MPAC Tax Roll			
		Import CD-Roll or CD-OASYS			

Configuration
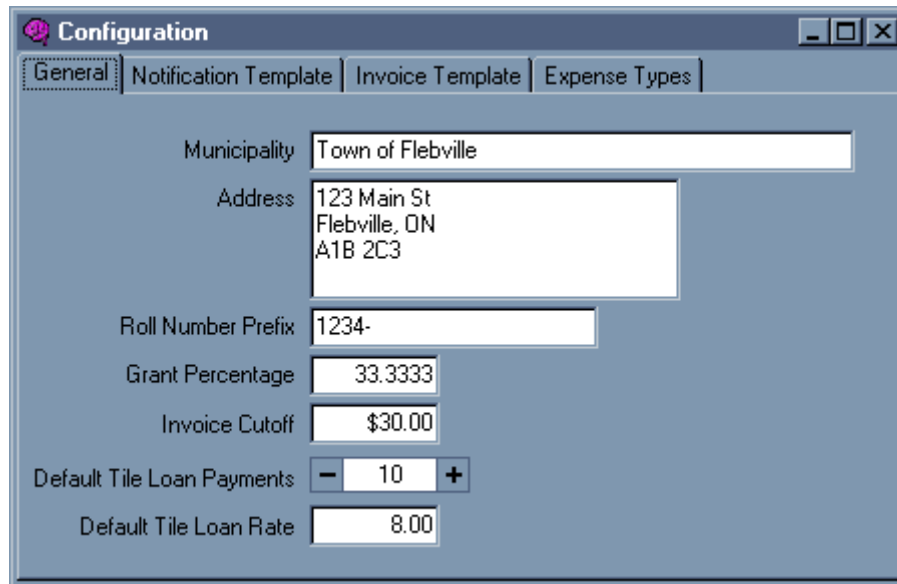
Part III

3   Configuration

3.1   The Configuration Form

Open the Configuration Form by clicking on the Configuration button on the Main Form, or by selecting Configuration from the Setup menu.

General Information

The Configuration Form - General Tab

At the top of the Configuration Form are fields for entering the following information:

▸   The municipality name, as you would like it to appear on printed reports.
▸   The roll number prefix for your municipality. This is used as a default when you create new properties manually.
▸   The percentage grant to be applied to eligible properties.
▸   The invoice cutoff amount. Only invoices for amounts greater than the cutoff will be printed.

Notification Letter and Invoice Templates
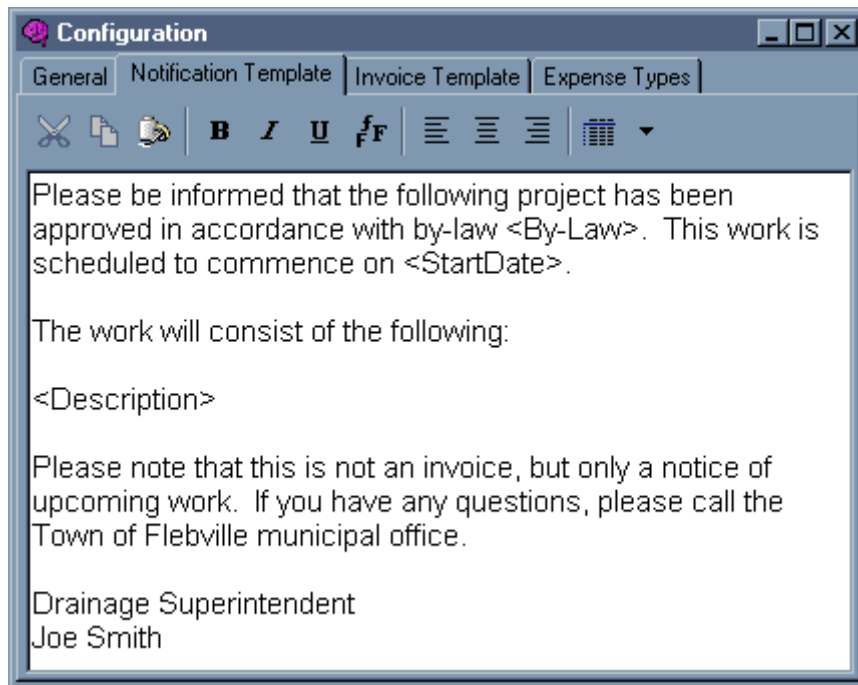
The Configuration Form - Notification Template Tab

Drain Brain can produce Letters of Notification and Invoices for projects. You can store templates for these letters that can be copied to new projects as they are created. These templates are accessible from the Notification Template and Invoice Template tabs on the Configuration Form. Use the toolbar buttons just above the text of the template to perform cut-and-paste operations and to modify the format or alignment of the text. The rightmost button on the toolbar can be used to insert project information fields, such as the property roll number or the project start date, that can be merged into the letters when they are printed. The toolbar functions are also available from a pop-up menu that appears if you click on the text with the right-hand mouse button.

Project Expense Types
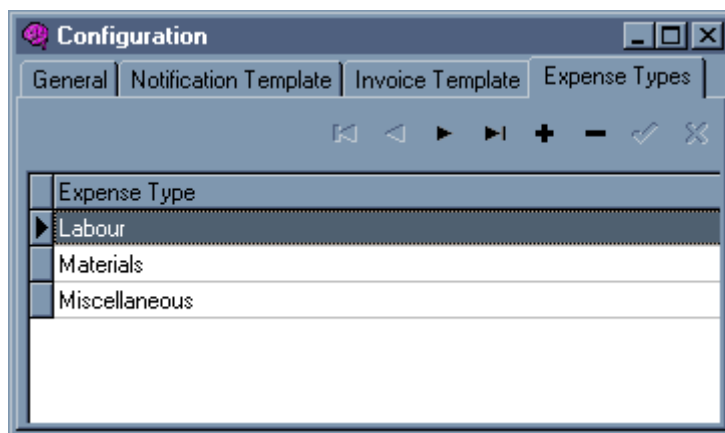
The Configuration Form - Expense Types Tab

Drain Brain enables you to set up type of project expenses. Access this feature by selecting the Expense Types tab on the Configuration Form. You can add new types of expenses, and edit or delete

existing expense types. Note that you will not be able to remove an expense type if it is being used in a project.
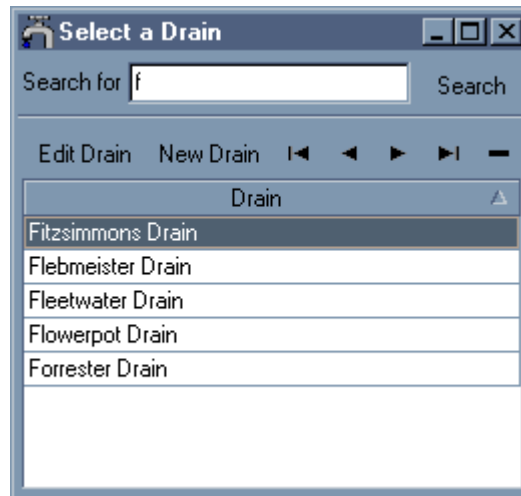
Drains

Part IV
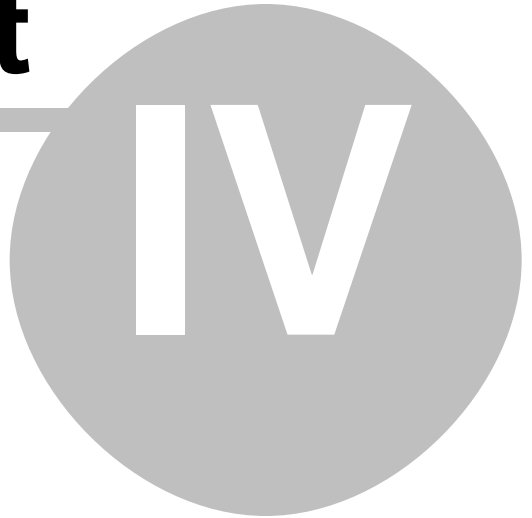
4   Drains

4.1   Selecting a Drain

To edit an existing drain, you must first select it from Drain Selection Form. Access the Drain Selection Form by clicking on the Drains button on the Main Form, or by selecting Drains from the Drain menu.

The Drain List Form

To narrow the list of drains that appear in the list, type the first few letters of a drain's name in the Search for field at the top of the Drain Selection Form. When you press the Enter key or click on the Search button, Drain Brain will retrieve a list of drains with names that start with the letters that you have entered. Once you have located the drain that you wish to edit, you can view or modify that drain by double-clicking on the name of the drain, or by selecting the drain and clicking on the Edit Drain button.

4.2   Adding a New Drain

Add a new drain by clicking on the New Drain button on the Drain List Form, or by selecting New Drain from the Drain menu on the Main Form.

The New Drain Form

This will bring up the New Drain Form, where you can enter the name, class (Main/Branch), and by-law associated with the new drain. When you click on the Finish button, the Drain Edit Form will open, enabling you to edit the new drain. If you do not wish to create a new drain, click on the Cancel

button.

4.3   Editing a Drain

To edit a drain, select the drain from the Drain List Form. This will open the Drain Edit Form. At the top of the Drain Edit Form you can modify the name, class and by-law information for the drain. The following sections describe how to edit the property, project, and image information for the drain.

Properties

The Properties tab of the Drain Edit Form enables you to add to or modify the list of properties associated with a drain. To associate properties with a drain, you must first open the Property List Form, either from the Main Form or by clicking on the Show Property List button on the Drain Edit Form. Add properties by dragging one or more properties from the Property List Form to the property area of the Drain Edit Form. (Note: use the Ctrl and Shift keys to select more than one property at a time). If a drain crosses a property more than once, then the property should appear more than once in the list of properties for that drain. Once you have associated a property with a drain, you can set an assessment type and assessment value for that portion of the drain.

Roll Number	Benefit	Outlet
Name	Assessment Type	Area
1234-000-010-04700-0000	4321.00	1234.00
Affleb, Ben	Regular	
1234-000-010-03800-0000	800.00	200.00
Munchenfleb, Harold and Joyce	Agricultural	
1234-000-010-04200-0000	0.00	200.00
Flebmeister, Fred and Phyllis	Regular	
ROAD-000-000-00100-0000	0.00	0.00
Flebville Town Line	Fixed	
1234-000-010-04400-0000	0.00	350.00
Von Fleb, Otto	Agricultural	
1234-000-010-04500-0000	0.00	140.00
Del Flebbio, Teresa	Regular	
1234-000-010-05100-0000	0.00	235.00
7 Properties	Benefit: 5121.00	Outlet: 2359.00

The Drain Edit Form - Properties Tab

You can change the order in which the properties appear along the drain by dragging and dropping. It

is recommended that you list the properties in order from the mouth of the drain to the source of the drain. This makes it easier to set up new projects, because adjacent properties will appear together in the list.

Projects

You cannot edit information about projects from the Drain Edit Form. However, you can view lists of current and closed projects to which a drain belongs by selecting the Current Projects tab or the Closed Projects tab on the Drain Edit Form. To open the Project Edit Form for a given project, double-click on the project.

The Drain Edit Form - Current Projects Tab

Images

You can add images to a drain record by selecting the Images tab on the Drain Edit Form and clicking on the Add Image button. A dialog box will open which will allow you to select an image file to add to the database. You can also enter a title and a description for the image in the spaces above and below the image.
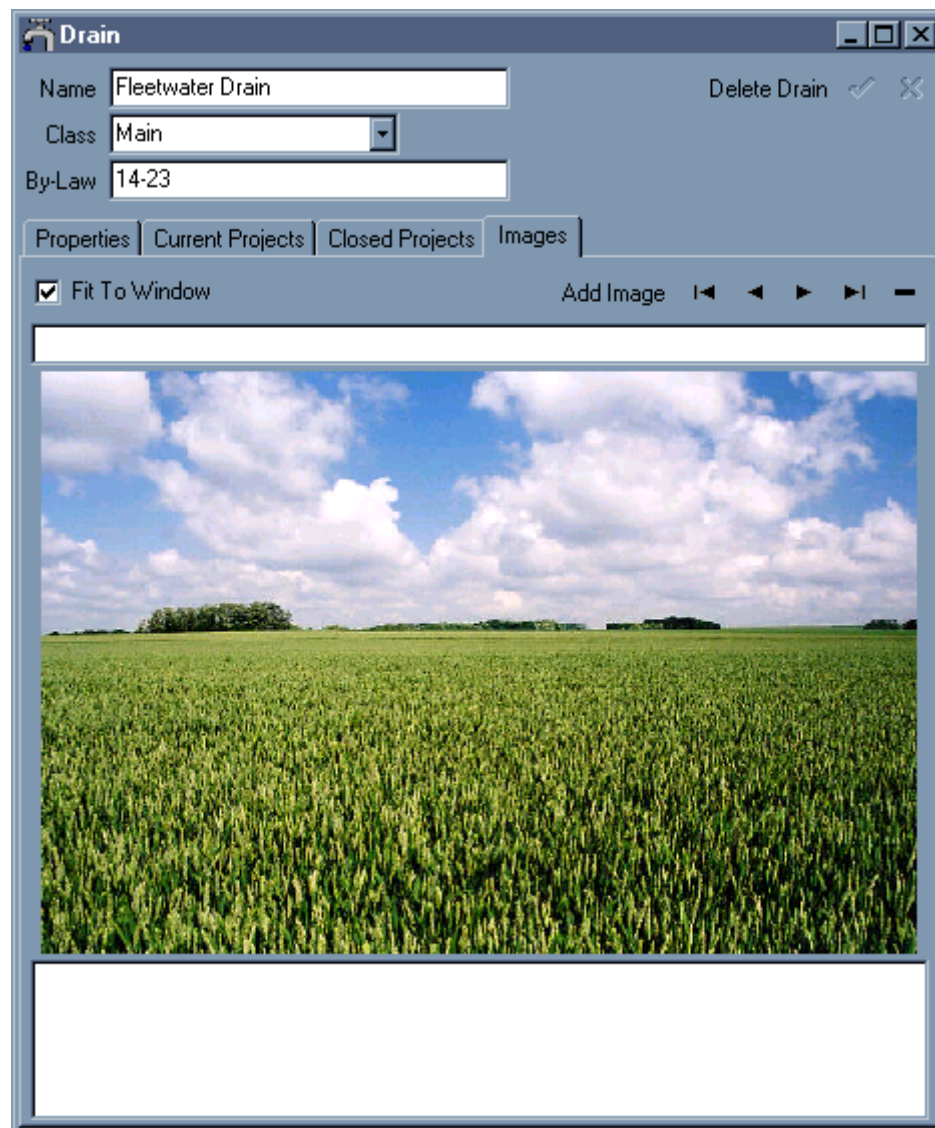
The Drain Edit Form - Images Tab

4.4   Drain Reports

Drain List Report

To print the Drain List Report, select Drain List from the Drain menu on the Main Form. You may select an alphabetical range of drain names to include in the report. The report itself is a list of drains, including the name, class (Main or Branch), and by-law.
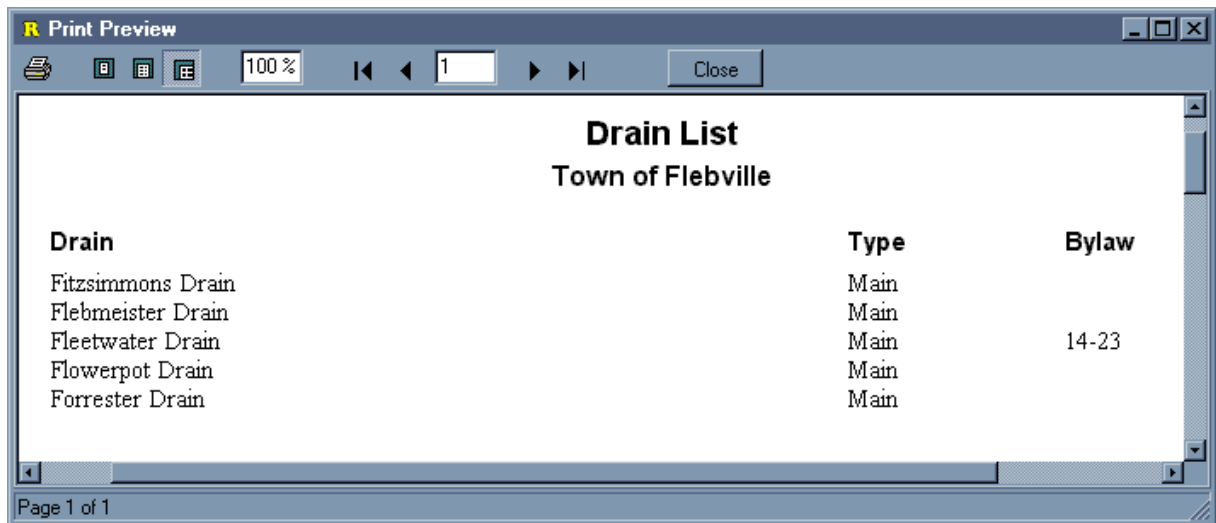
The Drain List Report Range Selection Form

The report appears in a preview window.

The Drain List Report Preview Window

Properties

Part V
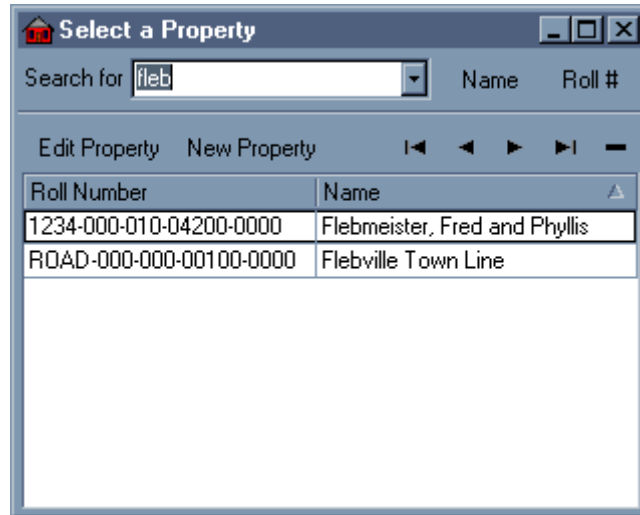
5 Properties

5.1 Selecting a Property

To edit an existing property, you must first select it from Property Selection Form. Access the Property Selection Form by clicking on the Properties button on the Main Form, or by selecting Properties from the Property menu.
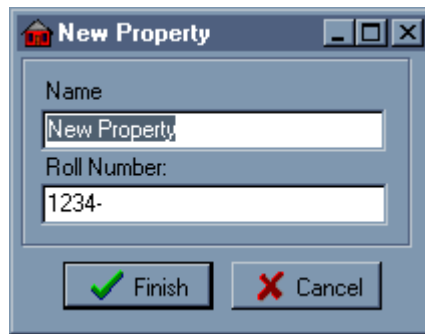
The Property Selection Form

Narrow the list by typing the first few characters of a property's name or roll number in the Search for field at the top of the Property Selection Form. When you press the Enter key, Drain Brain will retrieve a list of properties with names or roll numbers that start with the characters that you have entered. Once you have located the property that you wish to edit, you can view or modify that property by double-clicking on the name of the property, or by selecting the property and clicking on the Edit Property button.

5.2 Adding a New Property

Add a new property by clicking on the New Property button on the Property Selection Form, or by selecting New Property from the Property menu on the Main Form. This will bring up the New Property Form, where you can enter the name and roll number of the new property. When you click on the Finish button, the Property Edit Form will open, enabling you to edit the new property. If you do not wish to create a new property, click on the Cancel button.
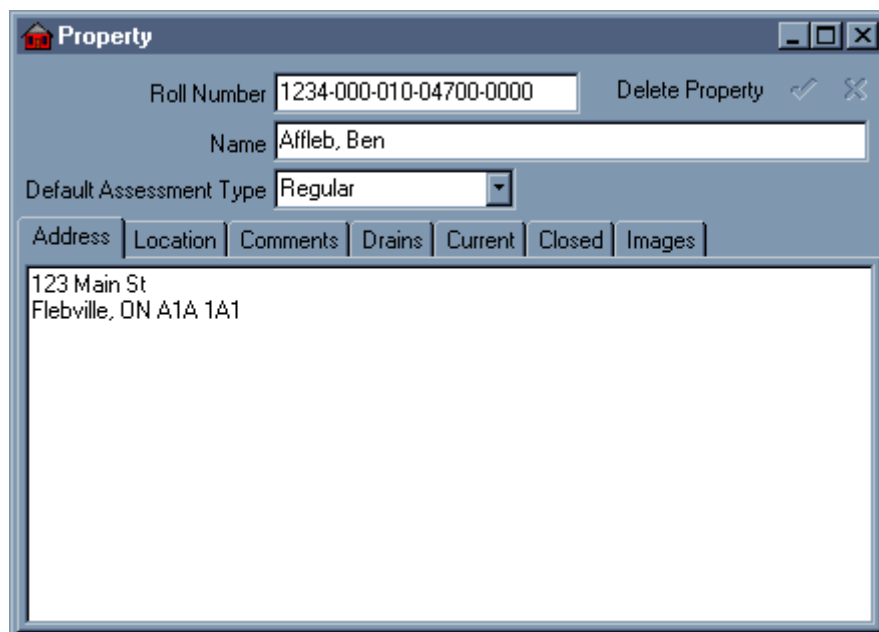
The New Property Form

5.3   Editing a Property

To edit a property, select the property from the Property Selection Form. This will open the Property Edit Form. At the top of the Property Edit Form you can modify the Name and Roll Number of the property.

Address
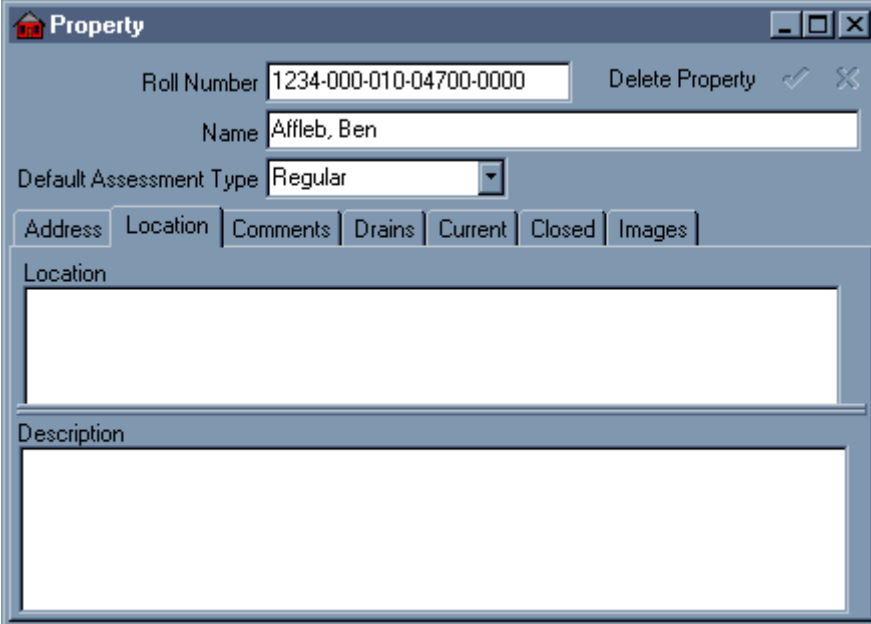
The Address tab of the Property Edit Form enables you to modify the billing address of the property.

The Property Edit Form - Address Tab

Location

The Location tab of the Property Edit Form enables you to edit the Location and Description of the property.
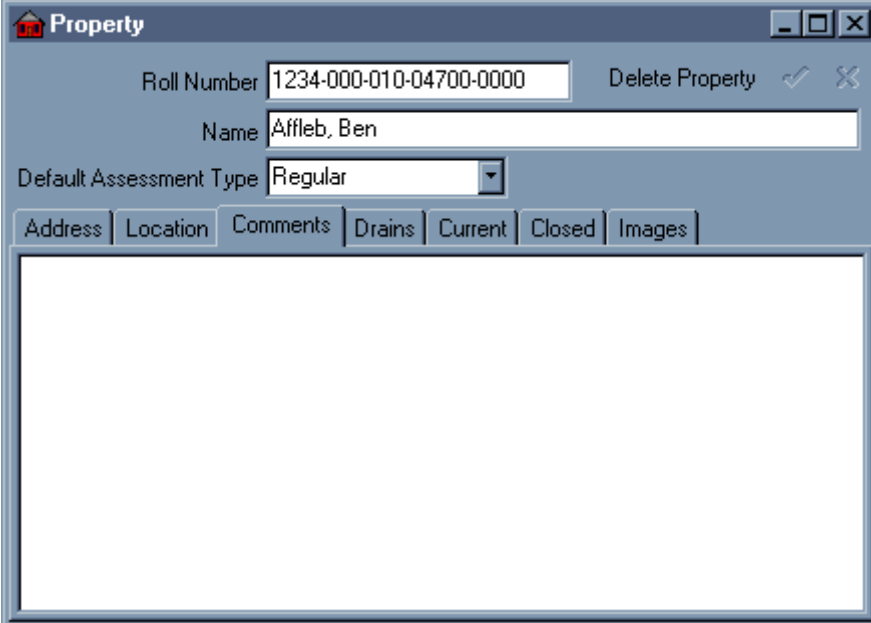
The Property Edit Form - Location Tab

Comments

The Comments tab of the Property Edit Form enables you to record Comments about the property.

The Property Edit Form - Comments Tab

Drains

The Drains tab of the Property Edit Form enables you to edit assessment types, assessment values and

areas of drains associated with a given property. You cannot add drains to a property from this form. Properties must be added to a drain on the Drain Edit Form so that the order of the properties along the drain can be specified.

The Property Edit Form - Drains Tab

Projects
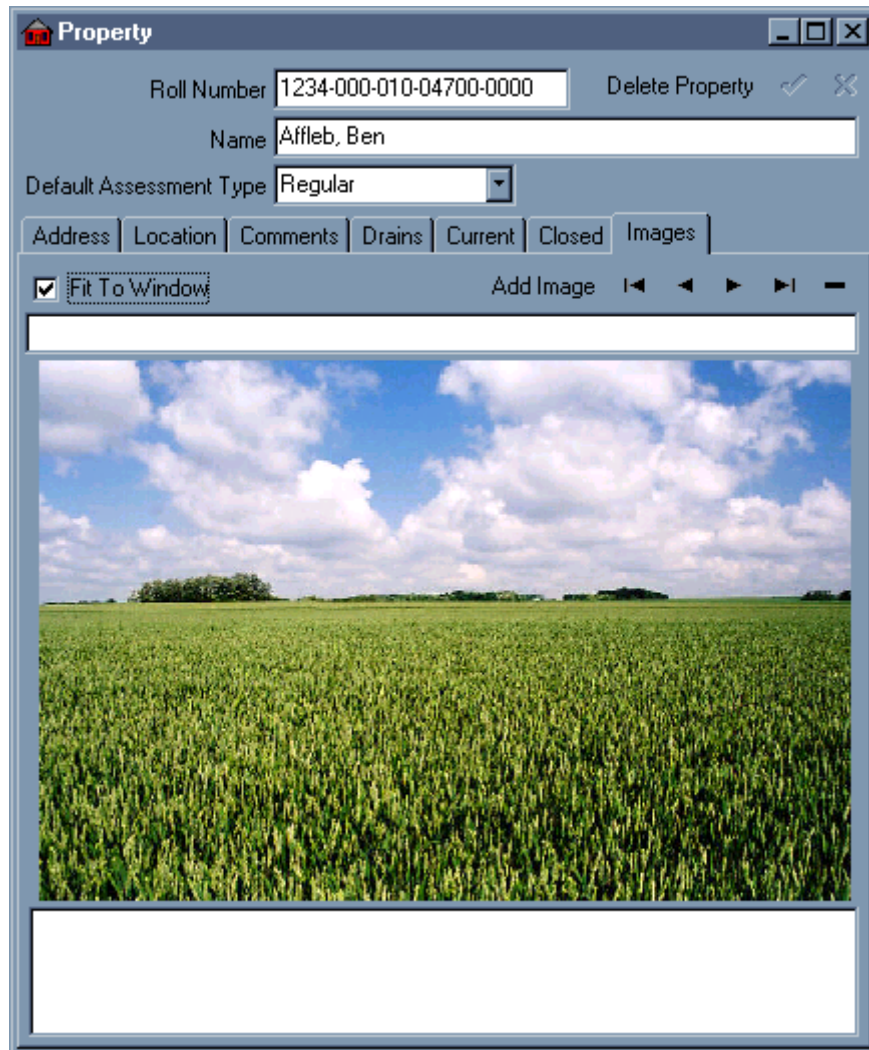
You cannot edit information about projects from the Property Edit Form. However, you can view lists of current and closed projects to which a property belongs by selecting the Current Projects tab or the Closed Projects tab on the Property Edit Form. To open the Project Edit Form for a given project, double-click on the project.

The Property Edit Form - Current Projects Tab

Images

You can add images to a property record by selecting the Images tab on the Property Edit Form and clicking on the Add Image button. A dialog box will open which will allow you to select an image file to add to the database. You can also enter a title and a description for the image in the spaces above and below the image.

The Property Edit Form - Images Tab

5.4   Importing Properties

You can import property information from the Ontario MPAC Tax Roll, or from the CD-Roll or CD-OASIS applications.

Importing from any of these sources only affects property information. Drain and project information remains unchanged. Property information may be updated during an import, but no properties will be deleted as a result of the import process.
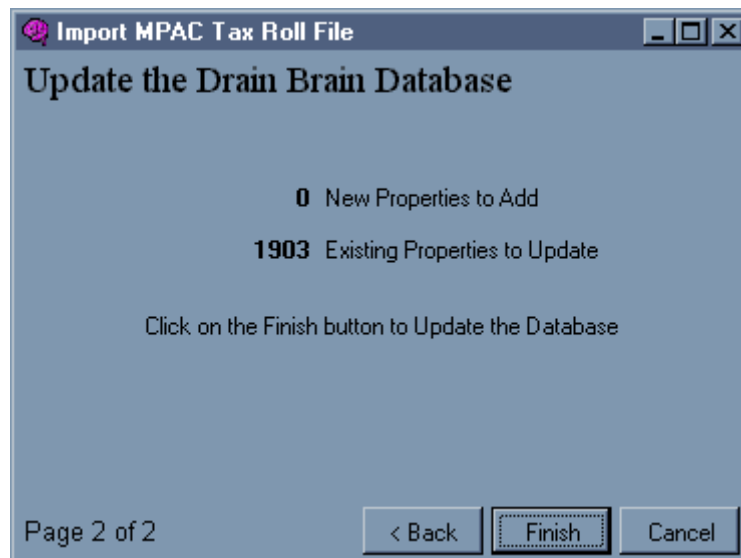
Importing from the MPAC Tax Roll

To import properties from the MPAC Tax Roll, you must first use the MPAC Tax Roll CD to create a text file that you can import. See the MPAC Tax Roll CD documentation for information on how to do this.

Once you have created the file to be imported, select Import MPAC Tax Roll from the Property Menu on the Main Form. You must then select the form to be imported, and indicate whether you want to update information for existing properties, using the checkbox provided. If you choose not to update existing properties, any new properties from the MPAC Tax Roll will still be added to the Drain Brain database.
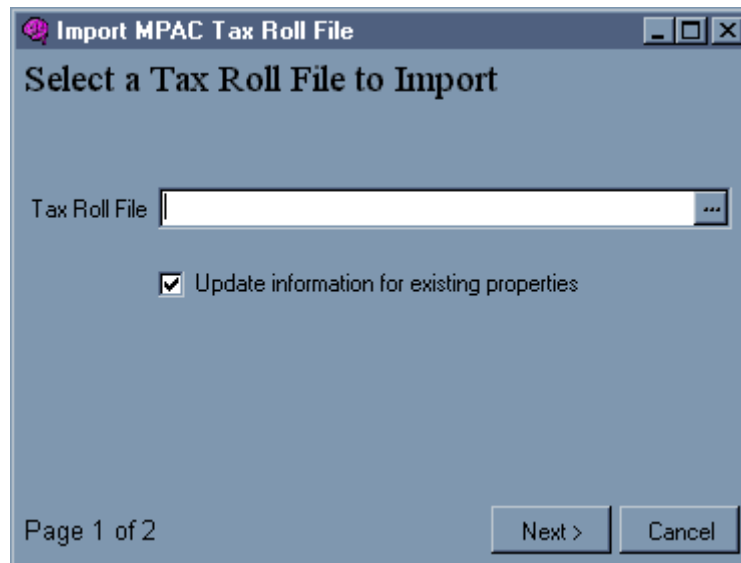
Import MPAC Tax Roll Wizard - First Page

After you click the Next button, you must wait for Drain Brain to process the import file. The time required for this step depends on the speed of your computer and the number of properties in your municipality. Roll Numbers are displayed as they are processed so that you can see how the import is progressing.
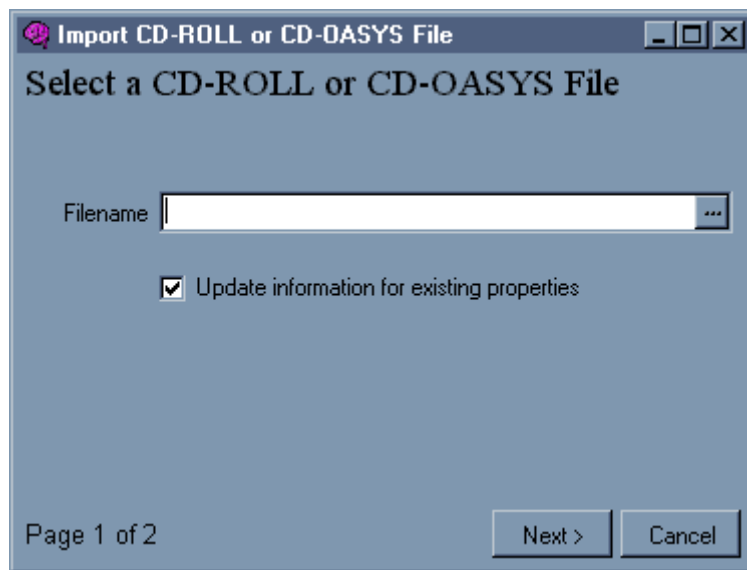
Import MPAC Tax Roll Wizard - Second Page

Once the import file has been analyzed, Drain Brain will show you how many new properties and how many existing properties were found. If you want to update the Drain Brain database with the information from the import file, click the Finish button. You will have to wait again as Drain Brain updates its own database with the new information.

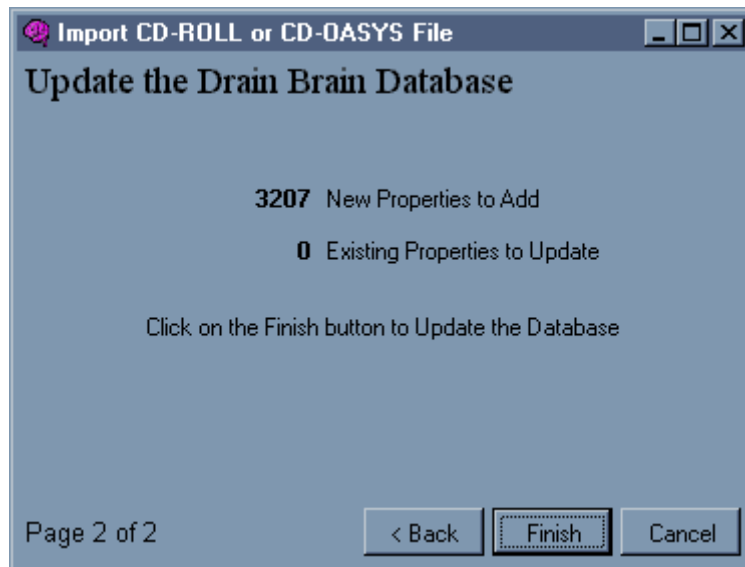## Importing from CD-Roll or CD-OASIS

To import properties from CD-Roll or CD-OASIS, you must first use the CD-Roll or CD-OASIS CD to create a comma-separated values ("csv") file that you can import. See the CD-Roll or CD-OASIS CD documentation for information on how to do this. **When exporting from CD-Roll or CD-OASIS, be sure that the following options are set correctly: the export type must be "Comma Delimited", you must include the "Names" SubDatabase, and the "Include Field Names" checkbox must be checked.**

Once you have created the file to be imported, select Import CD-Roll or CD-OASIS from the Property Menu on the Main Form. You must then select the form to be imported, and indicate whether you want to update information for existing properties, using the checkbox provided. If you choose not to update existing properties, any new properties from CD-Roll or CD-OASIS will still be added to the Drain Brain database.

Import CD-Roll or CD-OASIS Wizard - First Page

After you click the Next button, you must wait for Drain Brain to process the import file. The time required for this step depends on the speed of your computer and the number of properties in your municipality. Roll Numbers are displayed as they are processed so that you can see how the import is progressing.
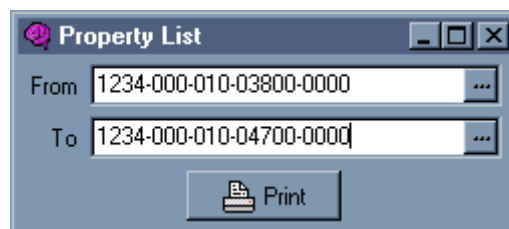
Import CD-Roll or CD-OASIS Wizard - Second Page

Once the import file has been analyzed, Drain Brain will show you how many new properties and how many existing properties were found. If you want to update the Drain Brain database with the information from the import file, click the Finish button. You will have to wait again as Drain Brain updates its own database with the new information.
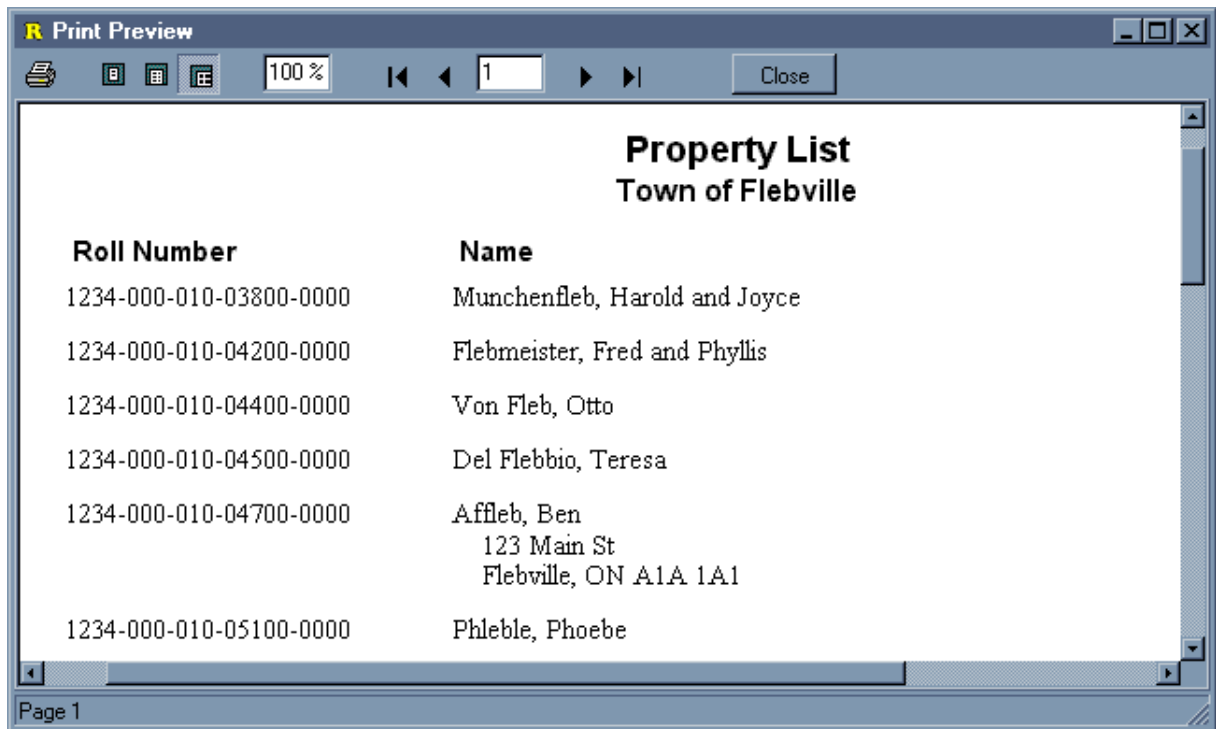
5.5   Property Reports

Property List Report

To print the Property List Report, select Property List from the Property menu on the Main Form. You may select a range of roll numbers to include in the report. The report is a list of properties, including the roll number, name, and address.

The Property List Report Range Selection Form
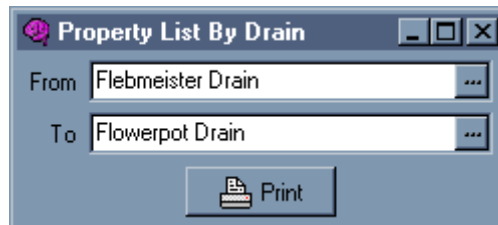
The report appears in a preview window.

Property List By Drain

To print the Property List By Drain Report, select Property List by Drain from the Property menu on the Main Form. You may select a range of drains to include in the report. The report is a list of properties, including the roll number and name, grouped by drain.

The Property List By Drain Report Range Selection Form

The report appears in a preview window.

R Print Preview

🖨 ▣ ▣ ▤ `100%` ◄◄ ◄ `1` ► ►► Close

Property List By Drain
Town of Flebville

Fleetwater Drain

		Benefit	Outlet	
1234-000-010-04700-0000	Affleb, Ben	4,321.00	1,234.00	Regular
1234-000-010-03800-0000	Munchenfleb, Harold and Joyce	800.00	200.00	Agricultural
1234-000-010-04200-0000	Flebmeister, Fred and Phyllis	0.00	200.00	Regular
ROAD-000-000-00100-0000	Flebville Town Line	0.00	0.00	Fixed
1234-000-010-04400-0000	Von Fleb, Otto	0.00	350.00	Agricultural
1234-000-010-04500-0000	Del Flebbio, Teresa	0.00	140.00	Regular
1234-000-010-05100-0000	Phleble, Phoebe	0.00	235.00	Regular
		5,121.00	2,359.00	

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Projects

Part VI
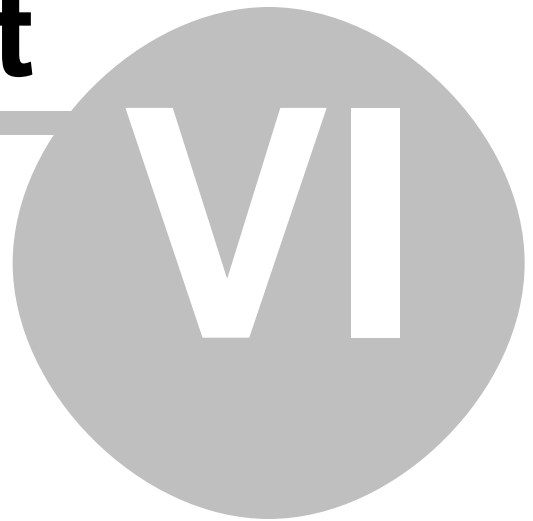
6 Projects

6.1 Selecting a Project

To edit an existing project, you must first select it from Project Selection Form. Access the Project Selection Form by clicking on the Projects button on the Main Form, or by selecting Projects from the Project menu.
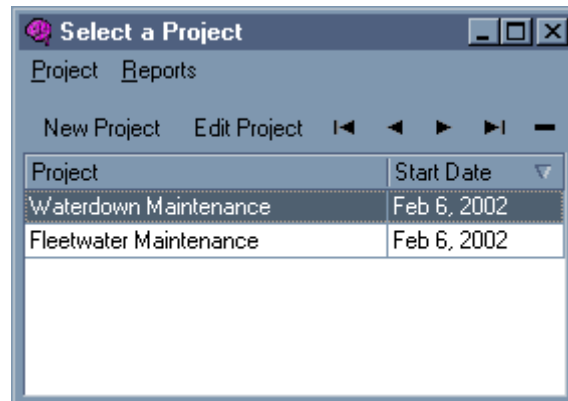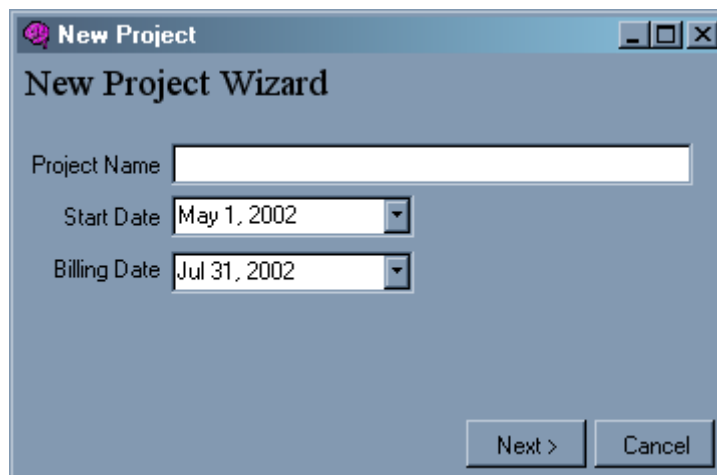
The Project Selection Form

By default, projects are listed in chronological order, beginning with the most recent. Once you have located the project that you wish to edit, you can view or modify that project by double-clicking on the name of the project, or by selecting the project and clicking on the Edit Project button.

6.2 Adding a New Project
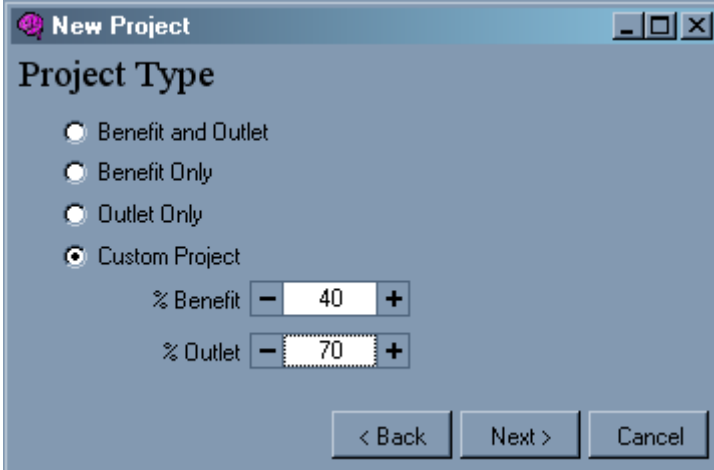
Add a new project by clicking on the New Project button on the Project Selection Form, or by selecting New Project from the Project menu on the Main Form. This will bring up the New Project Wizard. Move between pages of the wizard by clicking on the Next button.

On the first page, enter the Project Name, Start Date, and Billing Date.
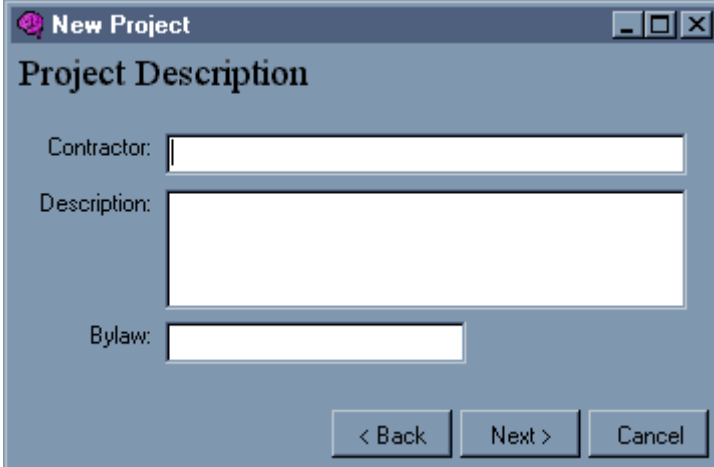
The New Project Wizard - First Page

On the second page, choose the type of project: Benefit and Outlet, Benefit Only, Outlet Only or Custom.

On the third page, enter the Contractor, Description, and By-law.

The New Project Wizard - Second Page

On the fourth page, indicate whether or not you wish to copy the notification letter and invoice from the available templates. When you are finished, click on the Finish button to open the Project Edit Form.
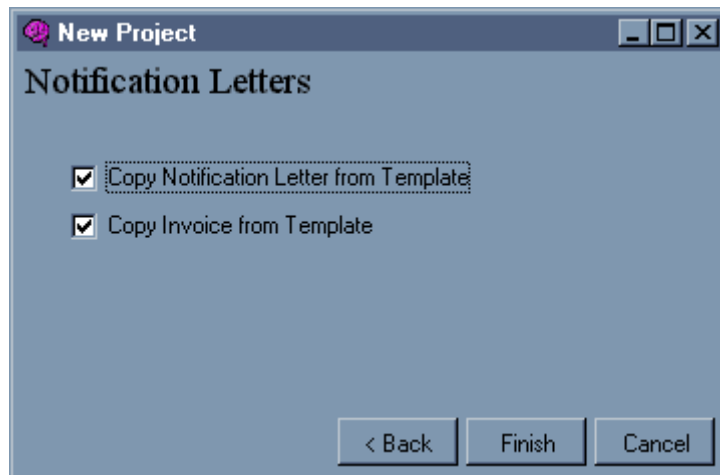
The New Project Wizard - Third Page

6.3 Editing a Project

To edit a project, select the project from the Project Selection Form. This will open the Project Edit Form. On the left side of the Project Edit Form you can modify the Name, Start Date, Billing Date, Contractor, By-law, and Description of the project. On the right side of the Project Edit Form are tabs which enable you to specify Project Details, Expenses, and Images. Other actions are available from the menus at the top of the form.

Details

To edit the detail of a project, select the Detail tab of the Project Edit Form. You can add new properties to a project by dragging them from the Select Property By Drain Form.

The Project Edit Form - Detail Tab

When working in the Detail section of the Project Edit Form, you can change the Assement Type, Assessment Amount, the Percentage to be Assessed, or the Grant Percentage. You can also edit Grant and Discount amounts.

Click on the Calculate button at any time to calculate the amount to be billed to each property. If the Assessment Type for a given property is set to Fixed, the amount billed is not calculated by the program. You must enter the amount to be billed directly. Fixed amounts are deducted from the total cost of the project, and any remaining balance is prorated to the other properties.

Expenses

To edit the list of project expenses, select the Expenses tab of the Project Edit Form. By default expenses are listed in chronological order. You can edit the date, type, amount, description and supplier of each expense. If you make changes that affect the total cost of the project, you should finish by selecting the Detail tab and recalculating the amount to be billed for each flow.

The Project Edit Form - Expenses Tab

Images

You can add images to a project record by selecting the Images tab on the Project Edit Form and clicking on the Add Image button. A dialog box will open which will allow you to select an image file to add to the database. You can also enter a title and a description for the image in the spaces above and below the image.
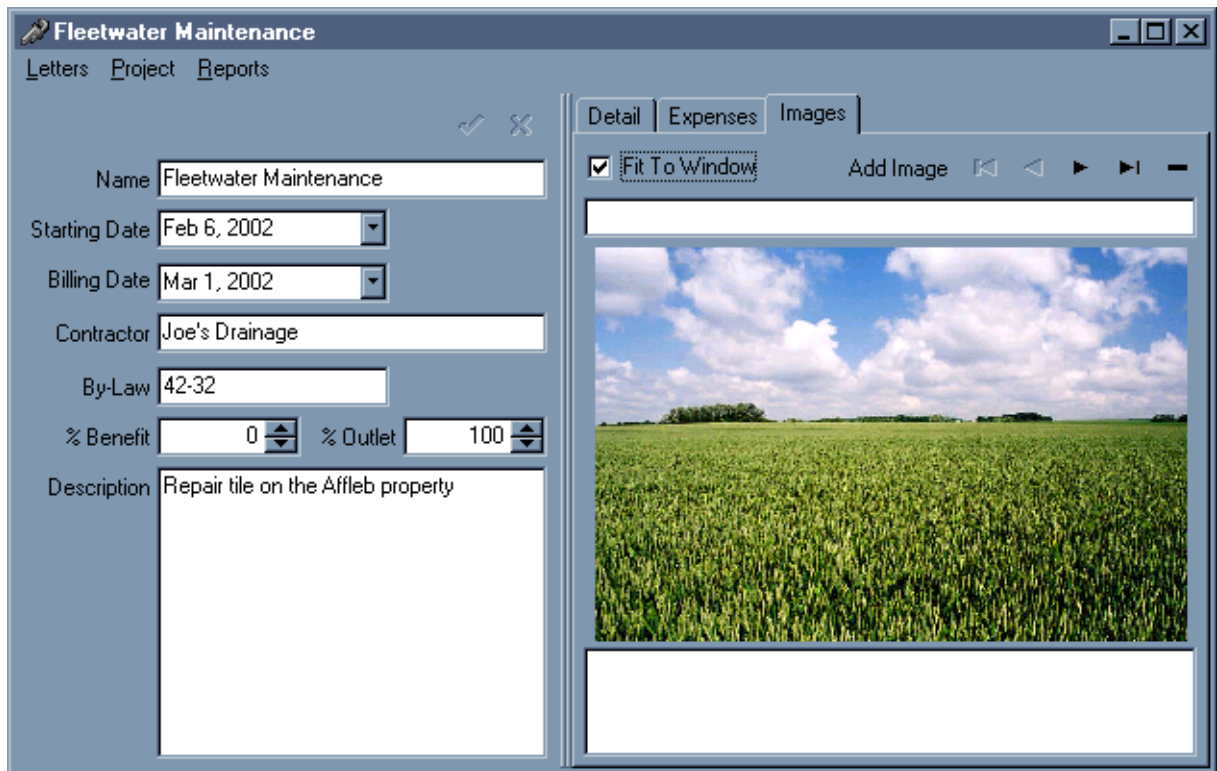
The Project Edit Form - Images Tab

Menus

The layout of the menus on the Project Edit Form is:

Letters	**Project**	**Reports**
Edit Notification Letter	Lock Project	Assessment Schedule
Edit Invoice	Delete Project	Project Expenses
Print Notification Letter		Export Schedule
Print Invoice		Export Expenses

6.4   Notification Letter and Invoice

Editing Notification Letters and Invoices

To edit the notification letter or invoice for a project, select Edit Notification Letter or Edit Invoice from the Letters menu on the Project Edit Form. Any changes made to the notification letter or invoice for an individual project will not affect the notification letter and invoice templates on the Configuration Form.
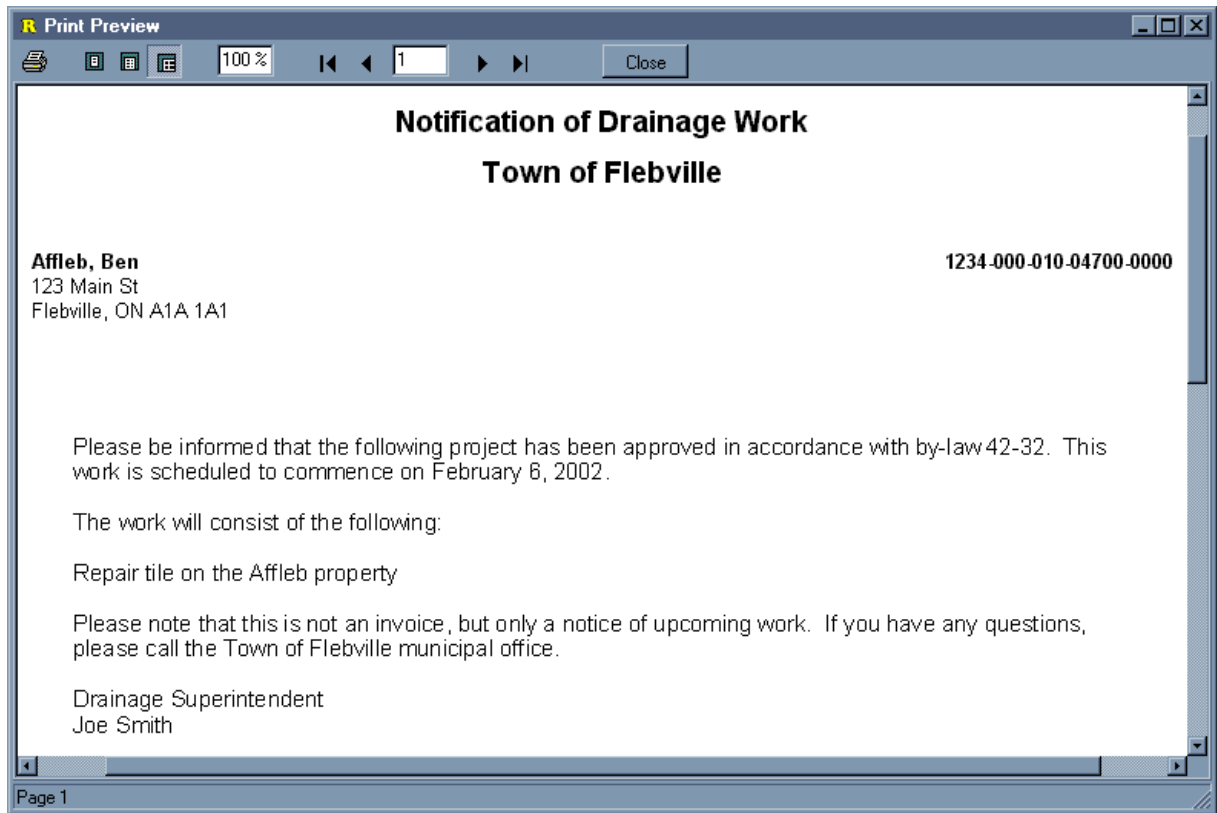
The Notification Letter Editing Form

Printing Notification Letters and Invoices

To print the notification letter or invoice for a project, select Print Notification Letter or Print Invoice from the Letters menu on the Project Edit Form. When the notification letter or invoice is printed, values for each flow in the project will be merged into the appropriate fields in the text of the letter or invoice.


Invoice Printing Selection Dialog

When printing invoices, you must specify whether you wish to print all invoices, or only those that exceed a certain amount. You can specify a default amount on the Configuration Form. You also have the option to choose a cutoff amount when you print the invoices, using the Invoice Printing Selection Dialog.

The notification letter and invoice appear in a preview window.

The Notification Letter Preview Window
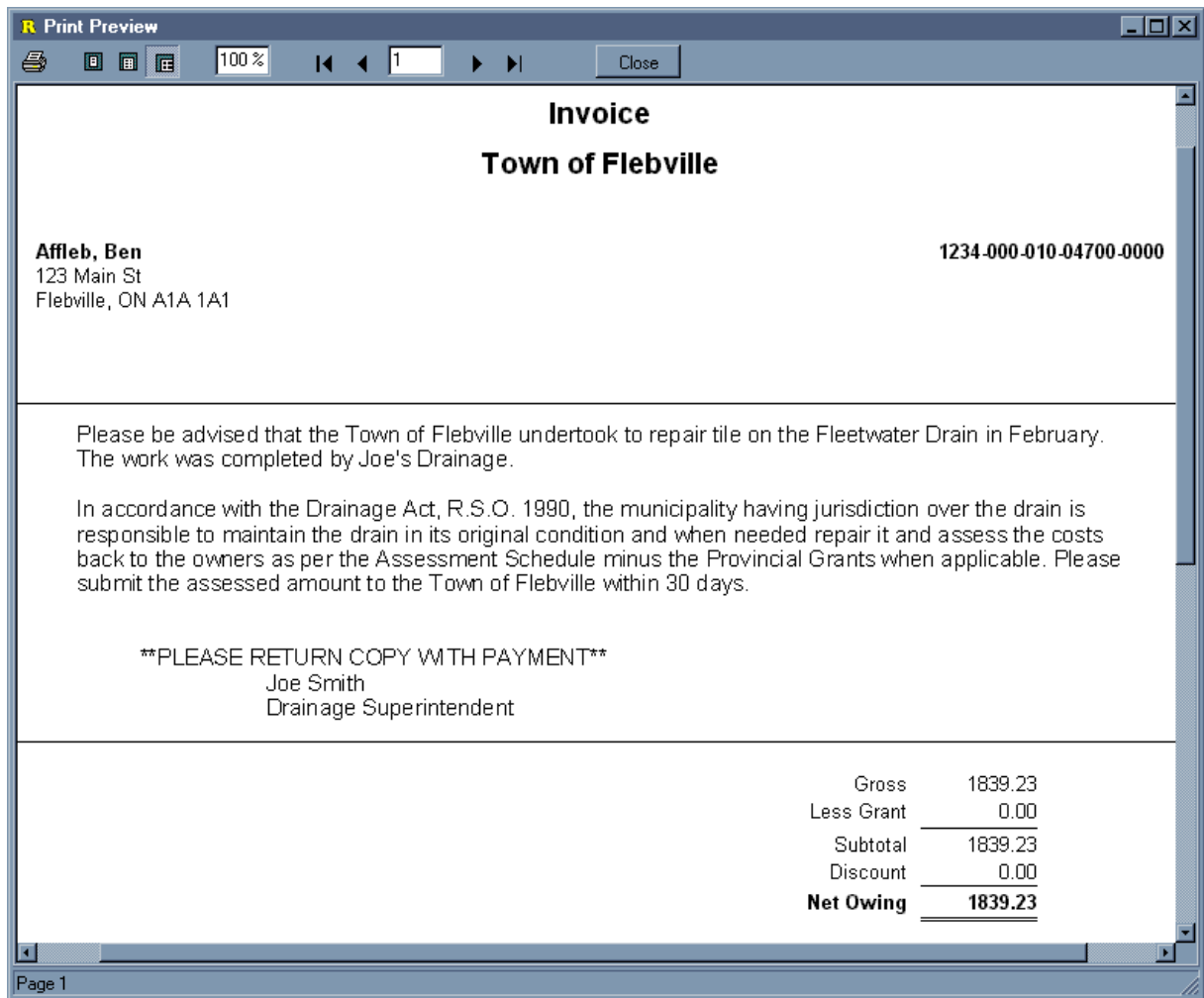
The Invoice Preview Window

6.5 Locking a Project

When you no longer need to make changes to a project, you can lock it by selecting Lock Project from the Projects menu on the Project Edit Form. Note that once a project is locked, it will not be possible to make further changes to that project. Therefore, this feature should only be used when you are absolutely certain that a project will never need to be modified in the future. Locked projects appear under the Closed Projects tabs on the Drain Edit Form and the Property Edit Form.

6.6 Deleting a Project

To delete a project, click on the Delete Project button, or select Delete Project from the Projects menu on the Project Edit Form. All flow detail and expenses will be deleted with the project. Other than restoring from a backup of your data, **there is no way to recover a deleted project**, so be very careful when using this feature.

6.7 Project Reports

Project Definitions

To print the Project Definitions Report, select Project Definitions from the Project menu on the Main Form, or select Project Definitions from the Reports menu on the Project Selection Form. The report shows the Name, Start Date, Cost, By-law, Contractor, Number of Drains, Number of Properties, and Status of each project.

The Project Definitions Preview Window

Assessment Schedule

To print the Assessment Schedule for a project, select Assessment Schedule from the Reports menu on the Project Selection Form, or select Assessment Schedule from the Reports menu on the Project Edit Form. The report shows the summary information for a given project and the detailed billing information for each property in the project. Subtotals for each Assessment Type are shown in a grid at the end of the report.

The Assessment Schedule Preview Window

Project Expenses

To print the Project Expenses Report for a project, select Project Expenses from the Reports menu on the Project Selection Form, or select Project Expenses from the Reports menu on the Project Edit Form. The report shows the summary information for a given project and the Date, Description, Expense Type, Amount and Supplier for each expense.

The Project Expense Report Preview Window

6.8   Exporting Project Information

The raw data that make up the Assessment Schedule and the Project Expense Report can be exported to a "comma-separated values" ("csv") file, which can be imported into a spreadsheet, such as Lotus 123 or Microsoft Excel.

Exporting the Assessment Schedule

To export the Assessment Schedule for a project, select Export Schedule from the Reports menu on the Project Selection Form, or select Export Schedule from the Reports menu on the Project Edit Form.

Invoice Export Selection Dialog

You must specify whether you wish to export the data for all invoices, or only those with amounts smaller than a given cutoff. You may be able to import the exported file into your municipal property tax billing software to be billed as a local improvement. Contact your municipal tax software vendor for details.

Exporting Project Expenses

To export the Project Expenses Report for a project, select Export Expenses from the Reports menu on the Project Selection Form, or select Export Expenses from the Reports menu on the Project Edit Form.

Part VII

7 Tile Loans

7.1 Selecting a Tile Loan

To edit an existing tile loan, you must first select it from Tile Loan Selection Form. Access the Tile Loan Selection Form by clicking on the Tile Loans button on the Main Form, or by selecting Tile Loans from the Tile Loan menu.

Tile Loan Selection Form

By default, tile loans are listed in chronological order, beginning with the most recent. Once you have located the tile loan that you wish to edit, you can view or modify that tile loan by double-clicking on the tile loan, or by selecting the tile loan and clicking on the Edit Tile Loan button.

7.2 Adding a New Tile Loan

One way to add a new tile loan is to select New Tile Loan from the Tile Loan menu on the Main Form. However, the preferred way to create a new tile loan is to select New Tile Loan from the right-button pop-up menu on the Property Selection Form. The advantage of the second approach is that the property information for the tile loan is filled in automatically from the property record. Either action will open the New Tile Loan Wizard.

On the first page of the New Tile Loan Wizard, enter the Roll Number, Applicant Name, and Address.

The New Tile Loan Wizard - First Page

On the second page of the New Tile Loan Wizard, enter the Application Number, Application Date, Debenture Number, Rating By-law Number, and Rating By-law Date.

The New Tile Loan Wizard - Second Page

On the third page of the New Tile Loan Wizard, enter the Amount of the loan, the Starting Year, the Number of Payments, and the Interest Rate of the loan.

The New Tile Loan Wizard - Third Page

The fourth page of the New Tile Loan Wizard displays the payment schedule for the loan. You cannot modify the payment schedule here. However, you can go back to the previous page of the New Tile Loan Wizard and change the parameters of the loan.

The New Tile Loan Wizard - Fourth Page

7.3   Editing a Tile Loan

You can edit the summary information for a given tile loan on the Tile Loan Edit Form. Open the Tile Loan Edit Form by selecting the appropriate tile loan from the Tile Loan Selection Form. The payment schedule is determined by the terms of the loan and cannot be edited.

The Tile Loan Edit Form

7.4   Printing a Tile Loan Application

To print a tile loan, click on the button on the Tile Loan Selection Form or the Tile Loan Edit Form.

Tile Loan Application

Town of Flebville
123 Main St
Flebville, ON
A1B 2C3

Applicant	Application #	
1234-000-010-04700-0000	Amount Requested	$1,200.00
Affleb, Ben	Debenture Amount	$1,200.00
123 Main St	Debenture #	
Flebville, ON A1A 1A1	Rating Bylaw Date	
	Rating Bylaw #	

Contractor

License #

Machine License   **Machine Make**

Loan Payment Schedule

Year	Installments	Interest	Principal	Balance
2002	$178.83	$96.00	$82.83	$1,117.17
2003	$178.83	$89.37	$89.46	$1,027.71
2004	$178.83	$82.22	$96.61	$931.10
2005	$178.83	$74.49	$104.34	$826.76
2006	$178.83	$66.14	$112.69	$714.07
2007	$178.83	$57.12	$121.71	$592.36
2008	$178.83	$47.39	$131.44	$460.92
2009	$178.83	$36.87	$141.96	$318.96
2010	$178.83	$25.51	$153.32	$165.64
2011	$178.83	$13.19	$165.64	$0.00
Totals	$1,788.30	588.3	1200	

The Tile Loan Application Preview Window
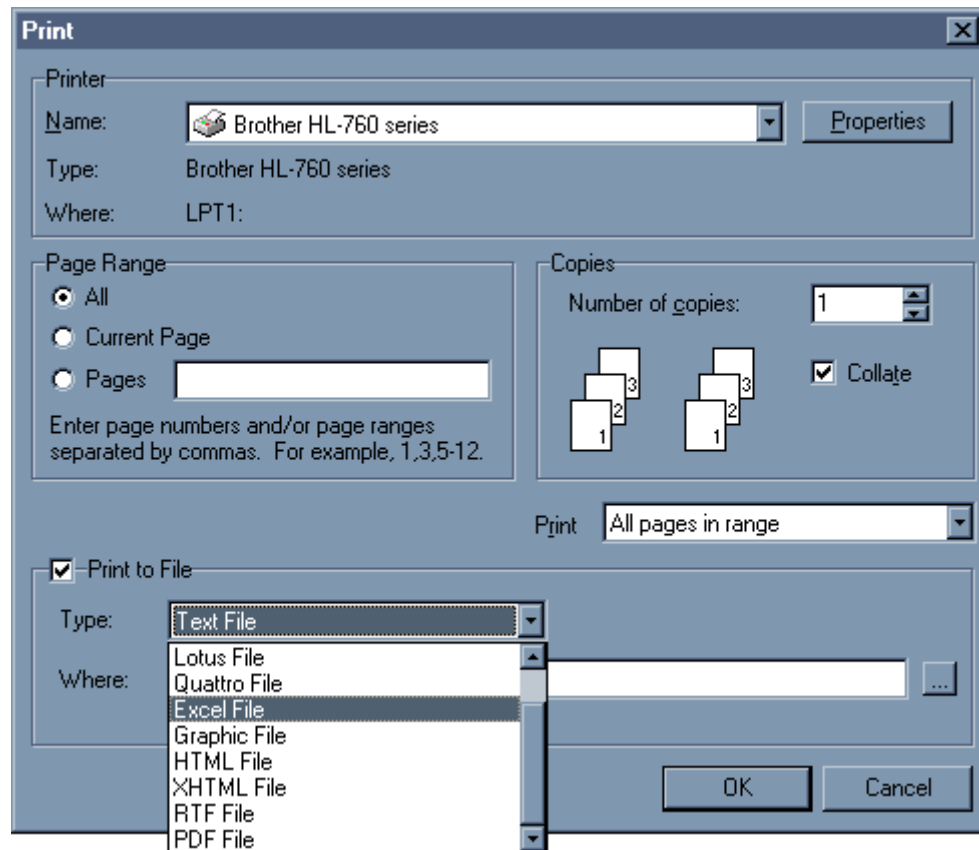
Helpful Hints

Part VIII

8   Helpful Hints

8.1   Printing to a File

Drain Brain allows you to print any report to a variety of different file types. On the Print Dialog that
appears when you print a report, simply check the Print to File box in the bottom left corner and select
the type of file that you wish to create from the list of available file types.

The Print Dialog Window

8.2   Selecting Multiple Items

Some list forms, such as the Select Property By Drain Form, allow you to select more than one item at
a time. Please note that not all lists allow this.

To select a range of items, click on the first item in the range, then press and hold the Shift key on you
keyboard, and click on the last item in the range. The entire range will be selected.

Roll Number	Name
1234-000-010-04700-0000	Affleb, Ben
1234-000-010-03800-0000	Munchenfleb, Harold and.
1234-000-010-04200-0000	Flebmeister, Fred and Phyl
ROAD-000-000-00100-0000	Flebville Town Line
1234-000-010-04400-0000	Von Fleb, Otto
1234-000-010-04500-0000	Del Flebbio, Teresa
1234-000-010-05100-0000	Phleble, Phoebe

Selecting a range of items with the Shift key

To select a group of non-consecutive items from a list, press and hold the Ctrl key on your keyboard while clicking on the various items that you wish to select.

Roll Number	Name
1234-000-010-04700-0000	Affleb, Ben
1234-000-010-03800-0000	Munchenfleb, Harold and.
1234-000-010-04200-0000	Flebmeister, Fred and Phyl
ROAD-000-000-00100-0000	Flebville Town Line
1234-000-010-04400-0000	Von Fleb, Otto
1234-000-010-04500-0000	Del Flebbio, Teresa
1234-000-010-05100-0000	Phleble, Phoebe

Selecting non-consecutive items with the Ctrl key

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