`Alberta

Information Package

Working With Your Electronic

Assessment Summary

Instructions on how to save your Assessment Summary Report from a CSV file into an Excel (Microsoft 1997-2003) spreadsheet

(*for a brief conversion to Excel 2007, see page 10*)

The information in your Assessment Summary Report was gathered from a database and produced as a CSV (comma-separated values) type file that can be converted to a Microsoft Excel spreadsheet. Your CSV file can be identified by the extension in the file name such as **Report.csv.** It looks like a series of text lines with values separated by a tilde (~). Here's an example:

> Doe~John~555~7077
> Johnson~Mary~555~3920
> Smith~Abigail~555~3958

It is recommended that the following step-by-step instructions on converting and saving your CSV file as an Excel file be used to prevent any data loss such as leading zeroes. If you have any questions or problems with the conversion, please contact Maureen Maddock at 780-644-7824 or maureen.maddock@gov.ab.ca .

Open your file:

1.   Insert the USB. An AutoPlay program should automatically display a menu (If the menu does not display, you can start it manually by following the directions on page 10.)

2.   Select **2017 Annual Linear Property Assessment**

3. A new list will appear displaying the Assessment Notice, Assessment Summary and Detail files. Depending on the property types included in the assessment, you may not see all of the Detail.csv files listed in the example below.

4. Select the CSV file you wish to review
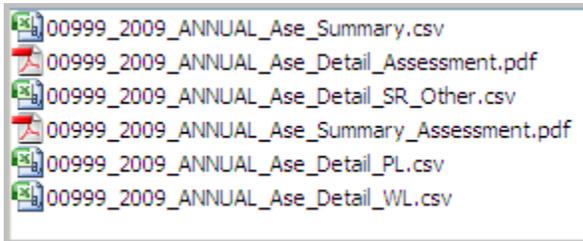
5. The file will automatically open in Microsoft Excel, but is **still in CSV-format**

6. To convert, highlight Column A

7. Select **Data**

8. Select **Text to Columns**
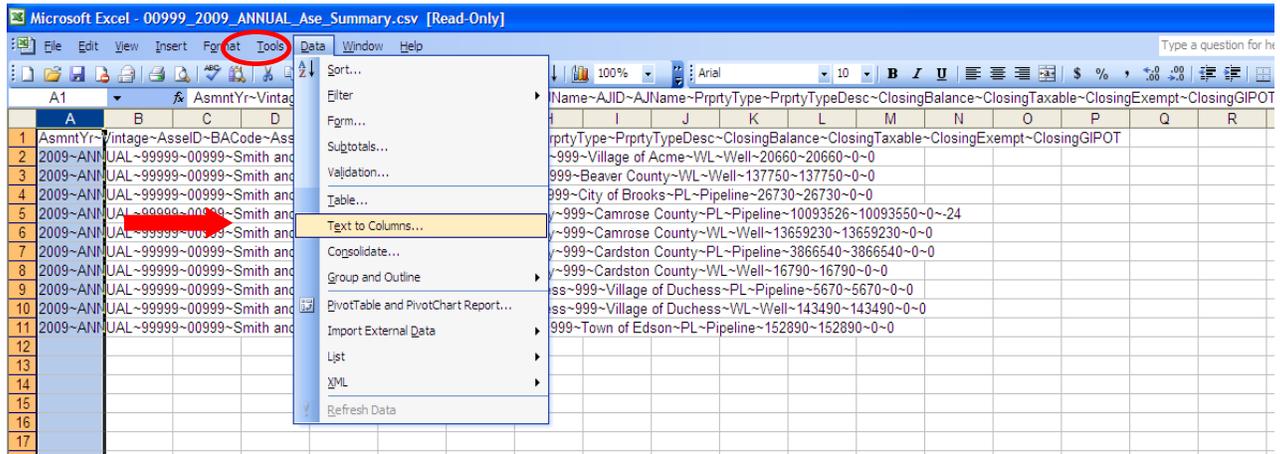
9. The **Convert Text To Columns Wizard - Step 1 of 3** window will be displayed.

10. From the **Original data type** box, select **Delimited**

11. Select **Next**

12. In the **Delimiters area**, select **Tab**

13. Select **Other**

14. In the box to the right of **Other** hold down the Shift key and enter the tilde "**~**" which is found to the left of the number 1 key on your keyboard (top left)

15. Select **Next**
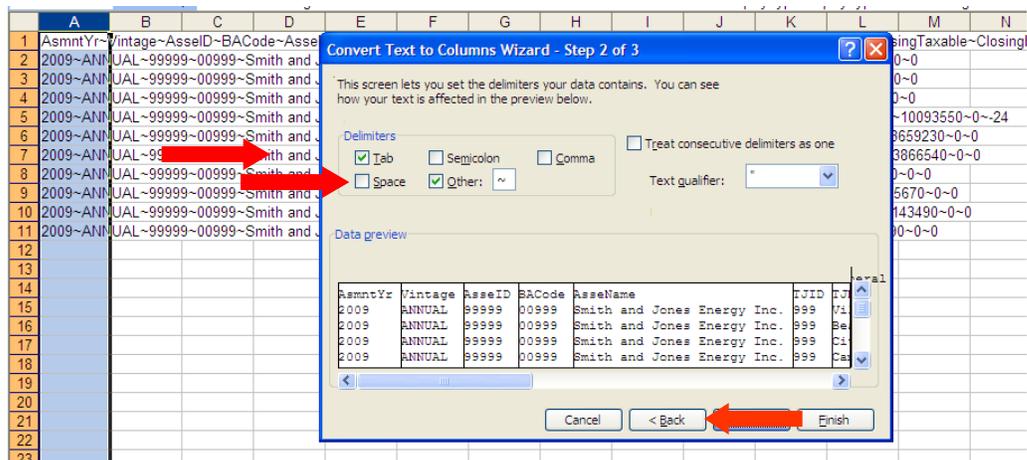
16. For **well property, please** go to step 17 to preserve the leading zeroes. All other property types, the Wizard will suggest to convert all columns to a General format, as follows:
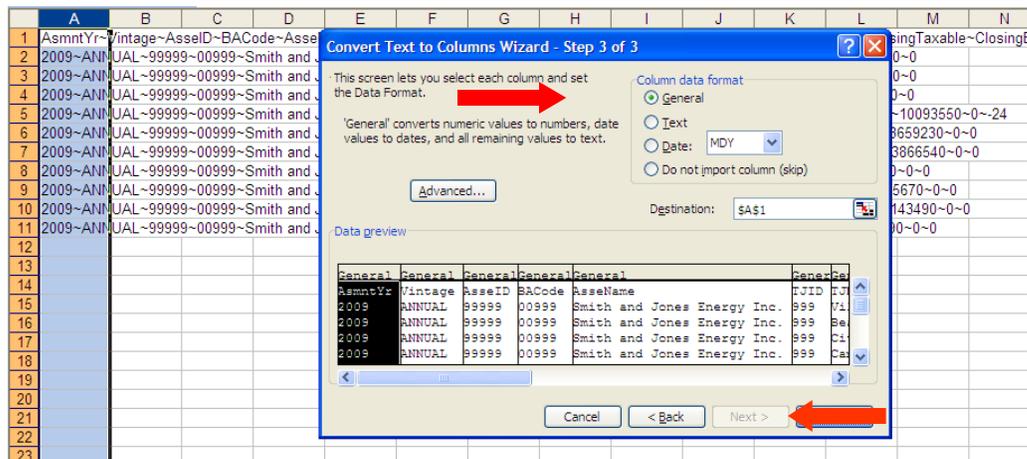
17. All property types other than Wells, please proceed to Step 21. For Wells, these columns with leading zeroes are identified as follows:

- **BACode** (for WL, PL and Summary file)
- **LicenceNo** (for WL)
- **WellID** (for WL)
- **WellStatus** (for WL)
- **PoolCode** (for WL)

To change the General format for "leading zeroes" columns:

18. In "Wizard" window, highlight the appropriate column (use the scroll bar, if required)
19. In the **Column data format** box, select **Text**
20. Repeat these steps for each column you require
21. Select **Finish**
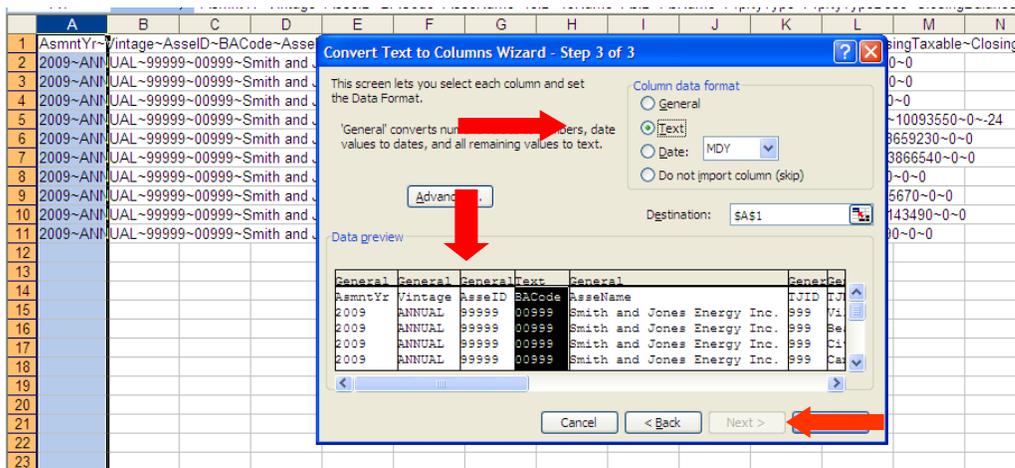
Assessed Person

22. Your data is now open in Excel format and any desired analysis can be completed.

   Please note that at this point you have <u>not yet saved</u> this file in Excel format.

23. To save this file in Excel, select **File** and **Save As**
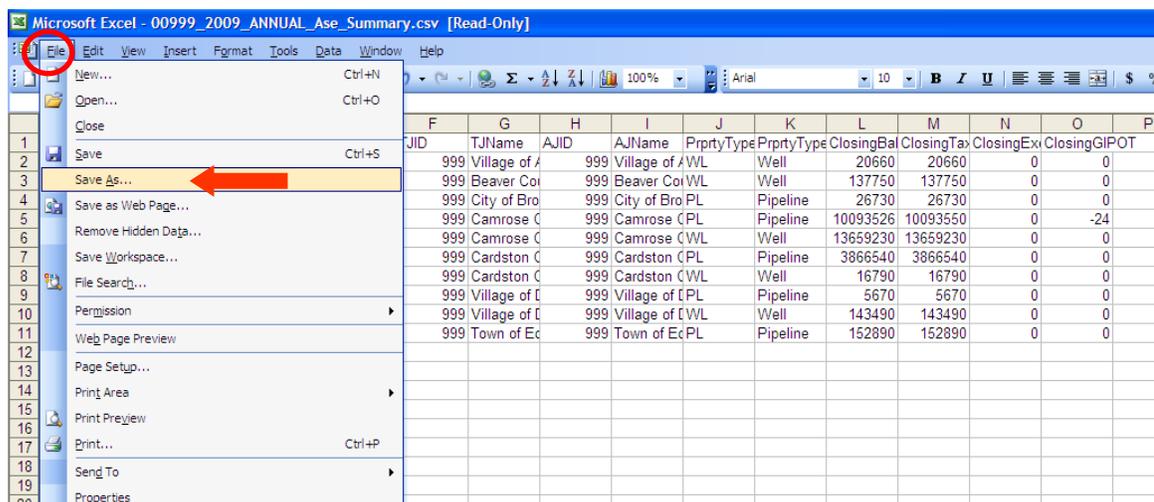
24. Choose the folder where you want to save the spreadsheet

25. Enter the **file name** for your spreadsheet

26. From the **Save as type** drop down list, select **Microsoft Excel 97-2003 & 5.0/95 Workbook (*.xls)**

27. Select **Save**
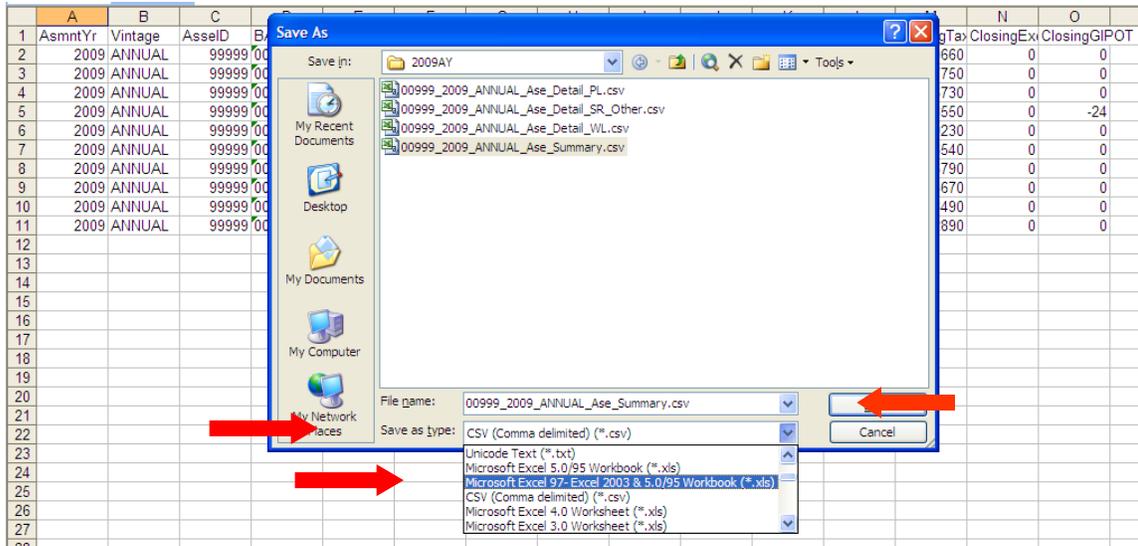
Your Assessment Summary Report is now <u>saved</u> in Excel format.

If you have any questions or problems with the conversion, you can contact Maureen Maddock at 780-644-7824 or maureen.maddock@gov.ab.ca

Assessment Summary Report

The following table lists the abbreviated headings you will see on the assessment summary report, the heading names in full, and a brief description of each column heading.

Column Heading on Report	Column Heading Name	Column Heading Description
AsmntYr	Assessment Year	Assessment year as defined in the *Matters Relating to Assessment and Taxation Regulation*
Vintage	Vintage	Official assessment production name
AsseID	Assessee ID	The Municipal Affairs (MA) identification number for the assessed person or corporation assigned by the Stakeholders Information Management System (SIMS)
BA Code	AER Code	The business associate identification number assigned by the Department of Energy (a zero has been added to the end in order to map to the AER's current coding), if applicable
AsseName	Assessee Name	Assessed person or corporation owning the assessed property
TJID	Taxing Jurisdiction ID	MA identification number for Alberta municipality with the ability to levy property taxes
TJName	Taxing Jurisdiction Name	The Alberta municipality with the ability to levy property taxes
AJID	Assessment Jurisdiction ID	MA identification number for an Alberta assessment jurisdiction
AJName	Assessment Jurisdiction Name	Assessment jurisdiction legal name which is an identified geographic area within a municipality
PrprtyType	Property Type Code	Type of linear property (codes are PL, GDP, WL, CBL, TEL, ELE, EPG)
PrprtyTypeDesc	Property Type Description	Description of type of linear property (Pipeline, Gas Distribution, Well, Cable Distribution Undertakings, Telecommunication Carrier, Electric Power, Electric Power Generation)
ClosingBalance	Balance Assessment	The balance amount of the assessment for Taxable and Exempt and Grant in Place of Taxes
ClosingTaxable	Taxable Assessment	The taxable amount of the assessment for the individual linear property
ClosingExempt	Exempt Assessment	The exempt amount of the assessment for the individual linear property
ClosingGIPOT	Grant in Place of Taxes	The assessment amount that may be subject to Grants in Place of Taxes, in accordance with the *Municipal Government Act*

Short version for converting a CSV file to an Excel 2007 spreadsheet

The following is a short version that will enable you to convert to Microsoft Excel 2007. For more information, please review the 1997-2003 version starting on page 2.

1. Open file
2. **Highlight** the column where all of the information is rooted – usually column A
3. Click on the **Data** tab at the top of your window
4. Under the **Data Tools** category, select **Text to Columns**
5. Select the **Delimited** radio button
6. Click **Next**
7. Select the **Other** category and enter a **~** (tilde, found to the left of the number 1 key)
8. Check the preview window to see if the information is in the correct columns (if you wish to maintain the leading zeroes in your columns, see step 17-20 above)
9. Click **Finish**
10. You can now save the converted text to Excel

If you have any questions or problems with the conversion, you can contact Maureen Maddock at 780-644-7824 or maureen.maddock@gov.ab.ca .

How to start the AutoPlay menu manually

Some computers do not allow an automatic display of AutoPlay menus. To start the menu manually:

1. Click on **Start**
2. Click on **My Computer**
3. Select the **USB DISK** (typically D)
4. Click on **autorun.exe** to start the AutoPlay menu
5. The AutoPlay menu should appear on your screen

If you have any questions or problems with the AutoPlay menu, you can contact Maureen Maddock at 780-644-7824 or maureen.maddock@gov.ab.ca .