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)

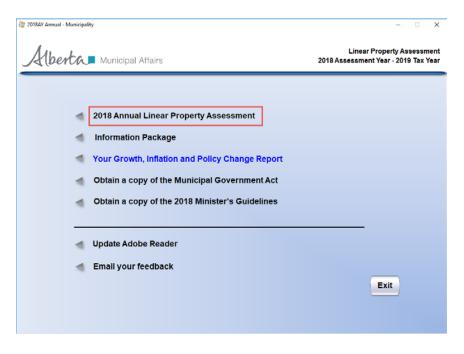
The information in your Assessment Summary Report was gathered from a database and produced as a CSV (comma-separated values) type file that can be converted to a Microsoft Excel spreadsheet. Your CSV file can be identified by the extension in the file name such as: **Report.csv.** It looks like a series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

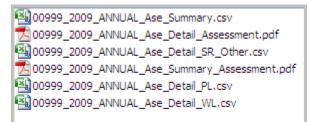
It is recommended that the following step-by-step instructions on converting and saving your CSV file as an Excel file be used to prevent any data loss such as leading zeroes. If you have any questions or problems with the conversion, please contact Maureen Maddock at 780-644-7824 or <u>Maureen.Maddock@gov.ab.ca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

Open your file:

- 1. Insert the Assessment USB in the USB DISK drive. 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 2019 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** 

	А	В	С	D	E	F	G	Н	1	J	K	L	M	N	0	
1	$Asmnt Yr^V intage^AsselD^*BACode^AsseName^TJID^TJName^AJID^*AJName^PrprtyType^PrprtyTypeDesc^ClosingBalance^ClosingTaxable^ClosingExempt^ClosingGIPOT$															
2	2009~ANN	UAL~99999	9~00999~S	mith and Jo	ones Energ	y Inc.~999	Village of	f Acme~999	~Village o	f Acme~Wl	.~Well~206	60~20660	'0~0			
3	2009~ANN	UAL~99999	9~00999~S	mith and Jo	ones Energ	y Inc.~999	"Beaver Co	ounty~999~	Beaver Co	unty~WL~\	Vell~13775	0~137750^	ʻ0~0			
4	2009~ANN	UAL~99999	9~00999~S	mith and Jo	ones Energ	y Inc.~999	"City of Bro	ooks~999~(	City of Broo	oks~PL~Pip	eline~2673	30~26730~(	0~0			
5	2009~ANN	UAL~99999	9~00999~S	mith and Jo	ones Energ	y Inc.~999	"Camrose	County~99	9~Camrose	County~P	L~Pipeline	~10093526	~10093550	0~0~-24		
6	2009~ANN	UAL~99999	9~00999~S	mith and Jo	ones Energ	y Inc.~999	"Camrose	County~99	9~Camrose	County~W	/L~Well~13	8659230~13	3659230~0	~0		
7	2009~ANN	UAL~99999	9~00999~S	mith and Jo	ones Energ	y Inc.~999	°Cardston	County~99	9~Cardstor	n County~P	L~Pipeline	~3866540^	ʻ3866540~ʻ(	0~0		
8	2009~ANN	UAL~99999	9~00999~S	mith and Jo	ones Energ	y Inc.~999	°Cardston	County~99	9~Cardstor	n County~V	VL~Well~1	5790~1679	0~0~0			
9	2009~ANN	UAL~99999	9~00999~S	mith and Jo	ones Energ	y Inc.~999	Village of	f Duchess~9	999~Village	e of Duches	is~PL~Pipe	line~5670′	~5670~0~0			
10	2009~ANN	UAL~99999	9~00999~S	mith and Jo	ones Energ	y Inc.~999	Village of	f Duchess~9	997Village	e of Duches	s~WL~We	I~143490~	143490~0~	0		
11	2009~ANN	UAL~99999	9~00999~S	mith and Jo	ones Energ	y Inc.~999	`Town of E	Edson~999~	Town of E	dson~PL~Pi	ipeline~15	2890~1528	90~0~0			

### 6. To convert, highlight Column A

	А	В	С	D	E	F	G	Н	1	J	K	L	М	N	0	
1	$AsmntYr^{V}$ intage "AsselD" BACode "AsseName "TJID "TJN ame "AJID" AJN ame "Prprty Type "Prprty Type Desc" Closing Balance "Closing Taxable" Closing Exempt "Closing GIP OT A Structure of the transmission of transmis															
2	2009~ANN	UAL~9999	9~00999~S	mith and J	ones Energ	y Inc.~999	Village of	Acme~999	∾Village o	f Acme~Wl	.~Well~206	60~20660	~0~0			
3	2009~ANN	UAL~9999	9~00999~S	mith and J	ones Energ	y Inc.~999	Beaver Co	ounty~999~	'Beaver Co	unty~WL~V	Vell~13775	0~137750	~0~0			
4	2009~ANN	UAL~9999	9~00999~S	mith and J	ones Energ	y Inc.~999	"City of Br	ooks~999~(	City of Broo	oks~PL~Pip	eline~2673	30~26730~	0~0			
5	2009~ANN	UAL~9999	9~00999~S	mith and J	ones Energ	y Inc.~999	"Camrose	County~99	9~Camrose	County~P	L~Pipeline	~10093526	~10093550	~0~-24		
6	2009~ANN	UAL~9999	9~00999~S	mith and J	ones Energ	y Inc.~999	"Camrose	County~99	9~Camrose	County~W	/L~Well~13	8659230~1	3659230~0	°0		
7	2009~ANN	UAL~9999	9~00999~S	mith and J	ones Energ	y Inc.~999	"Cardston	County~99	9~Cardstor	n County~P	'L~Pipeline	~3866540′	°3866540~0	0~0		
8	2009~ANN	UAL~9999	9 <mark>~00999</mark> ~S	mith and J	ones Energ	y Inc.~999	"Cardston	County~99	9~Cardstor	n County~V	VL~Well~1	6 <b>790</b> ~1679	0~0~0			
9	2009~ANN	UAL~9999	9~00999~S	mith and J	ones Energ	y Inc.~999	Village of	Duchess~9	999~Village	of Duches	s <sup>~</sup> PL <sup>~</sup> Pipe	line~5670′	~5670~0~0			
10	2009~ANN	UAL~9999	9~00999~S	mith and J	ones Energ	y Inc.~999	Village of	Duchess~9	999~Village	of Duches	s~WL~We	I <sup>~</sup> 143490 <sup>~</sup>	143490~0~	0		
11	2009~ANN	UAL~9999	9 <mark>~00999</mark> ~S	mith and J	ones Energ	y Inc.~999	'Town of E	dson~999^	Town of E	dson~PL~Pi	ipeline~15	2890~1528	90~0~0			

### 7. Select Data

### 8. Select Text to Columns

Microsoft Excel - 00999_2009_ANNUAL_Ase_Su	ummary.csv [Read-Only]	
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	rm	I J K L M N O P Q R
1 AsmntYr~/intage~AsselD~BACode~Ass		rprtyType~PrprtyTypeDesc~ClosingBalance~ClosingTaxable~ClosingExempt~ClosingGIPOT
2 2009~ANNUAL~99999~00999~Smith and		~999~Village of Acme~WL~Well~20660~20660~0~0
		999~Beaver County~WL~Well~137750~137750~0~0
4 2009~ANNUAL~99999~00999~Smith and Tabl	ble	999~City of Brooks~PL~Pipeline~26730~26730~0~0
6 2009~ANNUAL~99999~00999~Smith and Tex	xt to Columns	~999~Camrose County~PL~Pipeline~10093526~10093550~0~-24 /~999~Camrose County~WL~Well~13659230~13659230~0~0
	nsolidate	/~999~Cardston County~PL~Pipeline~3866540~3866540~0~0
9 2000 - ANNU IAL - 00000 - 00000 - Cmith and	-	/~999~Cardston County~WL~Well~16790~16790~0~0
9 2009~ANNUAL~99999~00999~Smith and	oup and Outline 🔹 🕨	ss~999~Village of Duchess~PL~Pipeline~5670~5670~0~0
10 2009~ANNUAL~99999~00999~Smith and 🖾 Pivo		ss~999~Village of Duchess~WL~Well~143490~143490~0~0
11 2009~ANNUAL~99999~00999~Smith and Imp	port External Data	999~Town of Edson~PL~Pipeline~152890~152890~0~0
12 List	. – .	
13		
14 XML	L •	
15 / Refi	fresh Data	
16		
17		

- 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

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	A	В	C	D	E	F	G	H	1	J	K	L	M	N
1	AsmntYr~	Vintage~A	sselD~BAC	ode~Asse	C			ard - Step	1 - 6 2				singTaxable	~ClosingE
2	2009~ANN	UAL~9999	9~00999~8	mith and .	Convert I	ext to Col	umns wiz	aru - step	1012				0~0	
3	2009~ANN	UAL~9999	9~00999~5	mith and .	The Text M	izard hae dai	termined the	t your data is l	Fived Widt	h			0~0	
4	2009~ANN	UAL~9999	9~00999~5	mith and .				ose the data			s vour data.		D~0	
5	2009~ANN	UAL~9999	9~00999~5	mith and .	Original da				.,				~10093550-	~0~-24
6	2009~ANN	UAL~9999	9~00999~5	mith and .	-		at hest desc	ribes vour dat					8659230~0~	-0
7	2009~ANN	UAL~9999	9~00999		<ul> <li>Delir</li> </ul>			such as comma		enarate ead	h field		3866540~0	~0
8	2009~ANN	UAL~9999	9~00999~5	mith and a				ianed in colum					D~0~0	
9	2009~ANN	UAL~9999	9~00999~5	mith and .		u <u>w</u> uun	r leids dire di	igned in colum	no menope	ices section	reach neith		5670~0~0	
10	2009~ANN	UAL~9999	9~00999~5	mith and .									143490~0~0	0
11	2009~ANN	UAL~9999	9~00999~5	mith and .									0~0~0	
12														
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19					<							>		
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21								Cancel	<	Back	Next >			
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#### 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

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	A	В	C	D	E	F	G		н	I		J		K	L	M	N
1	AsmntYr~	/intage~A	sselD~BAC	ode~Asse	Convert T	and the Cal		langed.	Cham 2							singTaxable	~Closingl
2	2009~ANN	UAL~9999	9~00999~	Smith and .	Convert			1241 U -	step z	U J						0~0	
3	2009~ANN	UAL~9999	9~00999~	Smith and .	This screen	n lets you se	t the deliv	itere veur	data co	ataiae	Vou car					0~0	
4	2009~ANN	UAL~9999	9~00999~	Smith and .		text is affect				rualitis.	Tou cai	i see				0~0	
5	2009~ANN	UAI ~9999	9~00999~	Smith and .												~10093550~	0~-24
	2009~ANN				Delimiters											8659230~0~	
_	2009~ANN				Tab						reat cor	nsecutive	delimiter	rs as on	e	3866540~0-	-
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19					<												
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21									Cancel		< Back	Ne	xt > <				
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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:

	A	В	С	D	E	F	G	H		J	K	L	M	N
1				ode~Asse	Convert T	ext to Coli	umns Wiz	ard - Step 3	3 of 3			2	singTaxable	~ClosingE
2	2009~ANN	UAL~9999	9~00999~9	Smith and J	Convort	0/12 20 201	3	and brops					0~0	
3	2009~ANN	UAL~9999	9~00999~8	Smith and J			ect each col	umn and set	Column	data format-			0~0	
4	2009~ANN	UAL~9999	9~00999~8	Smith and J	the Data Fo	ormat.			💽 💿 Ge	neral			0~0	
5	2009~ANN	UAL~9999	9~00999~8	Smith and J	(Carriell			to numbers, d	ate OTe	+			~10093550~	-0~-24
6	2009~ANN	UAL~9999	9~00999~8	Smith and J				values to text					8659230~0~	-0
7	2009~ANN	UAL~9999	9~00999~8	Smith and J					' <u>O D</u> a	te:	×		3866540~0-	~0
8	2009~ANN	UAL~9999	9~00999~8	Smith and J					O Do	not import co	olumn (skip)		D~0~0	
9	2009~ANN	UAL~9999	9~00999~8	Smith and J		Advance	ed						5670~0~0	
10	2009~ANN	UAL~9999	9~00999~8	Smith and J					D <u>e</u> sti	nation: \$/	\$1		143490~0~0	)
11	2009~ANN	UAL~9999	9~00999~8	Smith and J	-Data previe	ew							0~0~0	
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- 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)
  - WeIIID (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

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	A	В	C	D	E	F	G	H		J	K	L	M	N
1	AsmntYr~	/intage~As	sselD~BAC	ode~Asse	Course T			ard - Step 3	-6.2				pingTaxable	~Closing
2	2009~ANN	UAL~9999	9~00999~5	Smith and .	Convert 1	ext to Col	umns wiz	ard - Step 5	01.5				0~0	
3	2009~ANN	UAL~9999	9~00999~5	Smith and J	This screen	lets vou sel	ect each col	umn and set	Column	data format			0~0	
4	2009~ANN	UAL~9999	9~00999~8	Smith and J	the Data Fo	rmat.			O Ger				0~0	
5	2009~ANN	UAL~9999	9~00999~8	Smith and .				-					~10093550~	0~-24
6	2009~ANN	UAL~9999	9~00999~8	Smith and .			meric values	to values to text.					8659230~0~	0
7	2009~ANN	UAL~9999	9~00999~8	Smith and .	values to	uates, anu	aii remaining	values to text.	<u>     D</u> at	te: MDY	*		3866540~0-	-0
8			9~00999~5						O Do	not import o	olumn (skip)		0~0~0	-
9			9~00999~5			Advanc	ed	-					5670~0~0	
10			9~00999~5						Desti	nation: s	A\$1		143490~0~0	)
11			9~00999~5		/Data previe								0~0~0	
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17					2009	ANNUAL	99999				Inc. 999	Ci		
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#### 22. Your data is now open in Excel format and any desired analysis can be completed.

	A	В	С	D	E	F	G	Н	1	J	K	L	M	N	0
1	AsmntYr	Vintage	AsselD	BACode	AsseName	TJID	TJName	AJID	AJName	PrprtyType	PrprtyType	ClosingBal	ClosingTax	ClosingEx	ClosingGIPOT
2	2009	ANNUAL	99999	00999	Smith and	999	Village of A	999	Village of A	WL	Well	20660	20660	0	0
3	2009	ANNUAL	99999	00999	Smith and	999	Beaver Co	999	Beaver Co	WL	Well	137750	137750	0	0
4	2009	ANNUAL	99999	00999	Smith and	999	City of Bro	999	City of Bro	PL	Pipeline	26730	26730	0	0
5	2009	ANNUAL	99999	00999	Smith and	999	Camrose (	999	Camrose (	PL	Pipeline	10093526	10093550	0	-24
6	2009	ANNUAL	99999	00999	Smith and	999	Camrose (	999	Camrose (	WL	Well	13659230	13659230	0	0
7	2009	ANNUAL	99999	00999	Smith and	999	Cardston (	999	Cardston (	PL	Pipeline	3866540	3866540	0	0
8	2009	ANNUAL	99999	00999	Smith and	999	Cardston (	999	Cardston (	WL	Well	16790	16790	0	0
9	2009	ANNUAL	99999	00999	Smith and	999	Village of [	999	Village of [	PL	Pipeline	5670	5670	0	0
10	2009	ANNUAL	99999	00999	Smith and	999	Village of [	999	Village of [	WL	Well	143490	143490	0	0
11		ANNUAL	99999	00999	Smith and	999	Town of Ec	999	Town of Ec	PL	Pipeline	152890	152890	0	0
12															

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

🖾 N	licro	soft Excel - 00999_2	2009_ANI	NUAL_Ase_Summ	ary.csv [	Read-Only]									
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2		Save As				9 Village of 9 Beaver Co		Village of A Beaver Co		Well	20660 137750			0	
4	s)	Save as Web Page				9 City of Bro		City of Bro		Pipeline	26730			0	
5	32	_				9 Camrose (		Camrose (		Pipeline	10093526	10093550	0	-24	
6		Remove Hidden Da <u>t</u> a				9 Camrose ( 9 Cardston (		Camrose (		Well	13659230			0	
7 8		Save Workspace						Cardston ( Cardston (		Pipeline Well	3866540 16790			0	
9	12	File Searc <u>h</u>				9 Cardston ( 9 Village of I		Village of [		Pipeline	5670			0	
10		Per <u>m</u> ission				9 Village of I		Village of [		Well	143490		0	0	
11		We <u>b</u> Page Preview			99	9 Town of E	999	Town of Ed	PL	Pipeline	152890	152890	0	0	
12 13		Page Set <u>u</u> p													
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15 16	4	Print Pre <u>v</u> iew													
17	đ	Print		Ctrl+P											
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19		Properties													

- 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

	A	В	С		-			14		<u> </u>	N	0 F
1	AsmntYr	Vintage	AsselD B	Save As					? 🔀	gTax	ClosingEx	ClosingGIPOT
2	2009	ANNUAL	99999 0	Save in:	2009AY	V () - [	1 🕄 X 🗅	💥 те		660	0	0
3	2009	ANNUAL	99999 0	ouve in					Jojs +	750	0	0
4	2009	ANNUAL	99999 0	Ò		9_ANNUAL_Ase_Detail_PL.csv				730	0	0
5	2009	ANNUAL	99999 0			9_ANNUAL_Ase_Detail_SR_Other.csv				550	0	-24
6	2009	ANNUAL	99999 0	My Recent Documents		9_ANNUAL_Ase_Detail_WL.csv				230	0	0
7	2009	ANNUAL	99999 0		B00999_2009	9_ANNUAL_Ase_Summary.csv				540	0	0
8	2009	ANNUAL	99999 0							790	0	0
9		ANNUAL	99999 0							670	0	0
10		ANNUAL	99999 0							490	0	0
11	2009	ANNUAL	99999 0							890	0	0
12												
13												
14				My Documents								
15				-								
16												
17				My Computer								
18				My Compater								
19												
20					File <u>n</u> ame:	00999_2009_ANNUAL_Ase_Summary.c	CSV	*	Save			
21				My Network	Save as type:			~	Cancel			
22					Save as type.	CSV (Comma delimited) (*.csv)		~	Cancel			
23 24						Unicode Text (*.txt) Microsoft Excel 5.0/95 Workbook (*.xls	.)	<u>^</u>				
24						Microsoft Excel 97- Excel 2003 & 5.0/9		ds)				
25						CSV (Comma delimited) (*.csv)						
26						Microsoft Excel 4.0 Worksheet (*.xls) Microsoft Excel 3.0 Worksheet (*.xls)		~				
27					l	ind obort Excel bio worksheet (1XIS)						

#### 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 <u>Maureen.Maddock@gov.ab.ca</u>.

# **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	ERCB 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, RL).
PrprtyTypeDesc	Property Type Description	Description of type of linear property (Pipeline, Gas Distribution, Well, Cable Distribution Undertakings, Telecommunication Carrier, Electric Power, Electric Power Generation, Railway).
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 <i>Municipal Government Act</i> .

# 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 <u>Maureen.Maddock@gov.ab.ca</u>.

## 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 drive** (typically E)
- 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 <u>Maureen.Maddock@gov.ab.ca</u>.