

Downloading PMB525 File from AS400

PMB525 creates a file containing the data for the statewide Homeowner Exemption database. This file needs to be downloaded from the AS400 and sent to the Tax Commission as described in the “Instructions to send HO file to STC.docx” document.

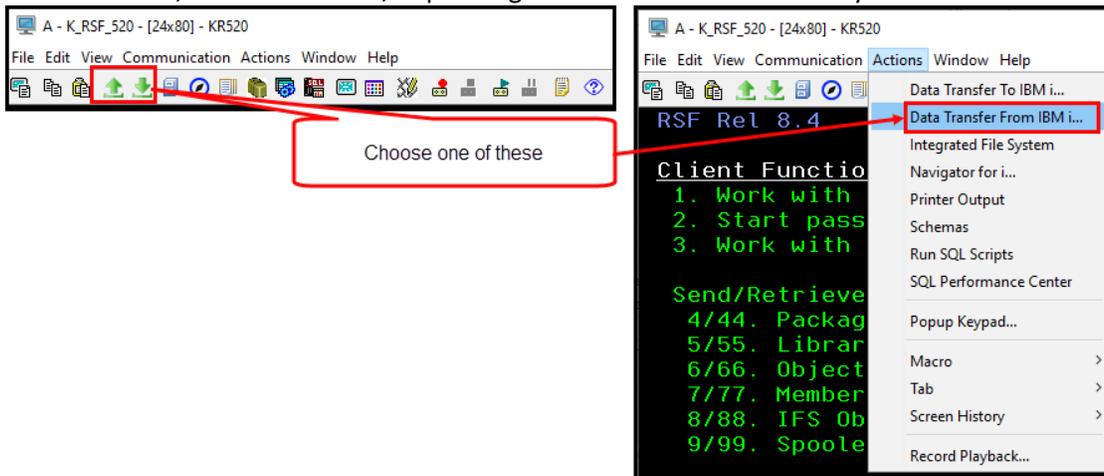
The steps are slightly different depending on your version of the terminal emulation software. This document uses screenshots from Client Solutions, which is the most current version. If your screens don't exactly match those in this document, you can still transfer the file. Contact TSB if you need assistance with any part of this process.

If you've saved the transfer as a .DTFX file:

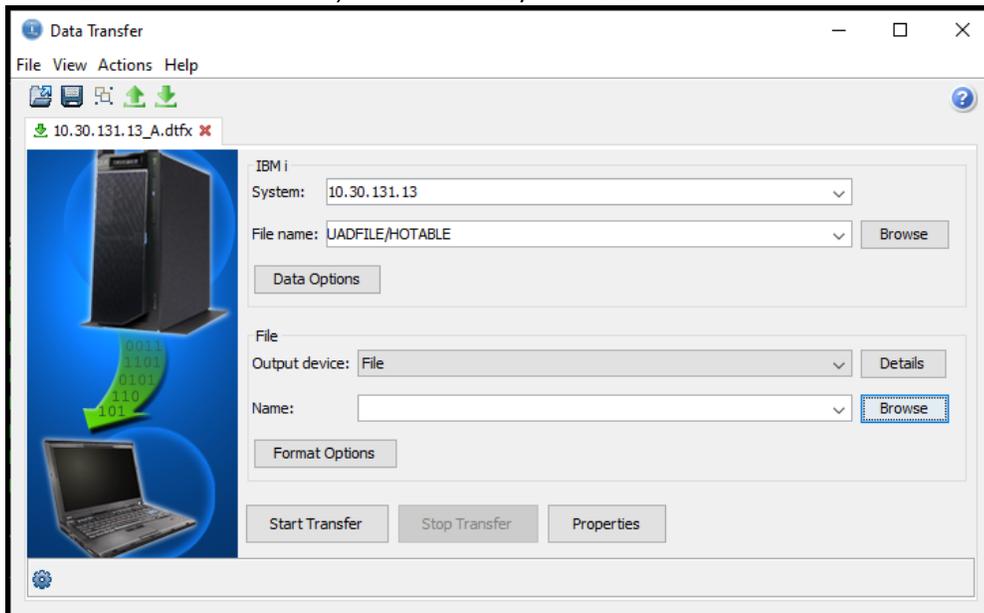
1. Locate your saved .DTFX file, open it, verify that the file name in the lower half of the screen is correct, and then click the Start Transfer button. Skip to Step 12.

If you haven't saved the transfer as a .DTFX file, complete steps 2 through 10, and then proceed with Step 12.

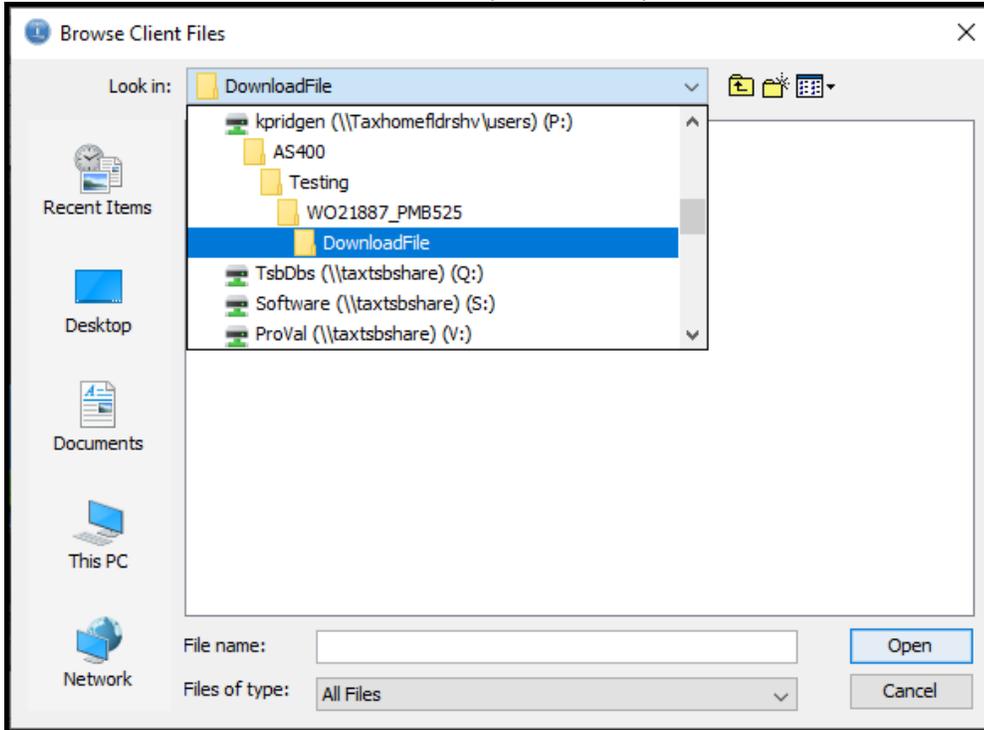
2. Locate the buttons or menu items for file transfers and choose Data Transfer From IBM. This may be called Receive File From Host, or a similar item, depending on the software version on your PC.



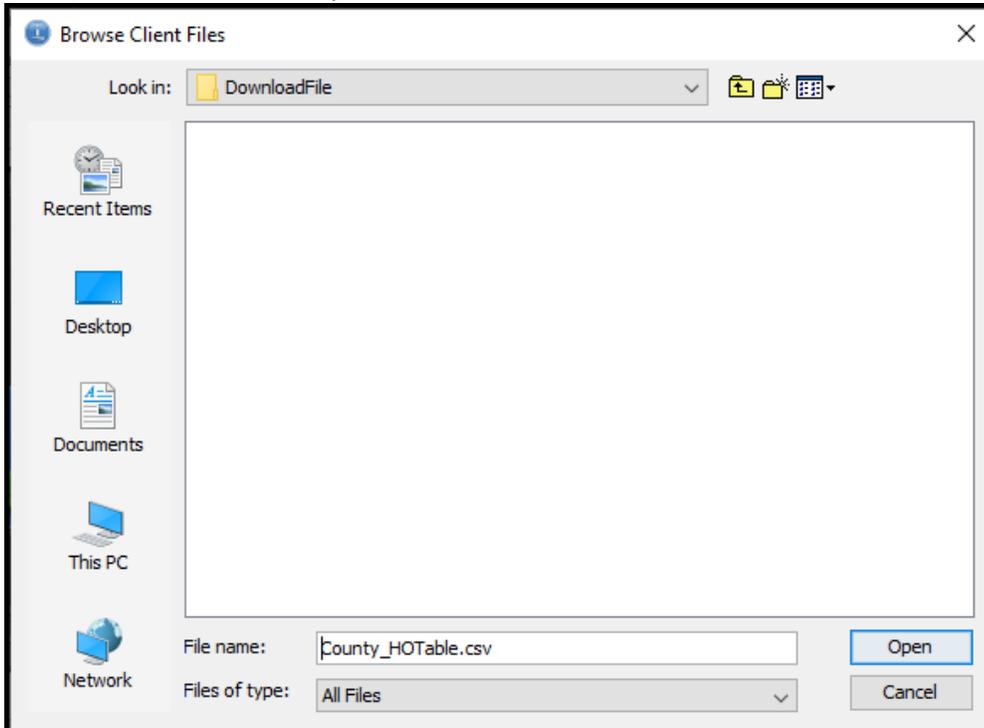
3. In the Data Transfer window, enter UADFILE/HOTABLE in the IBM File Name field:



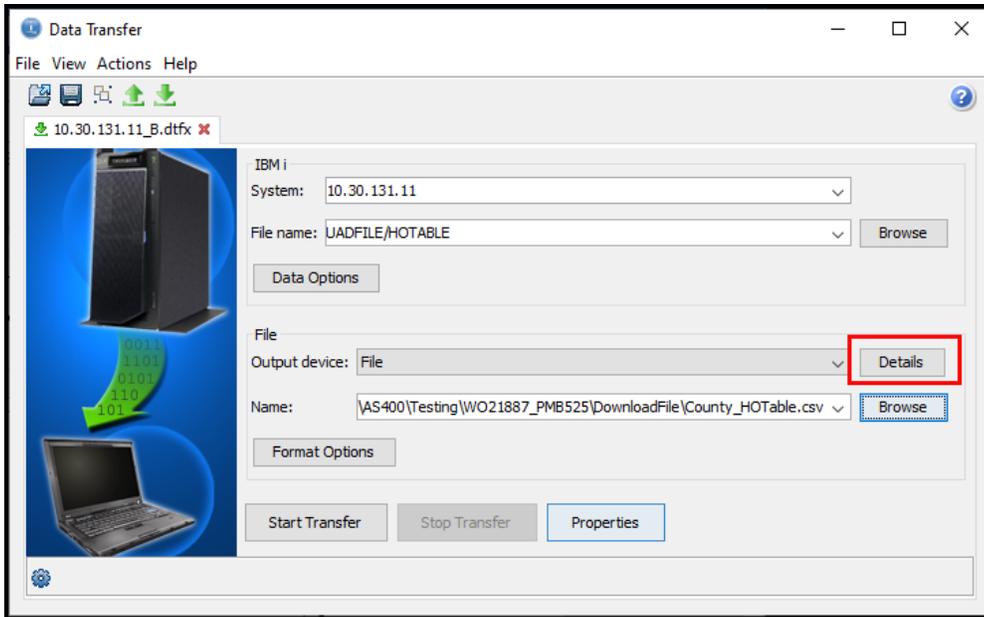
- 4. In the lower half of the screen, click the Browse button, and navigate to the location where you want to put the downloaded file. Choose a location that you can easily find later (it does not have to match screenshot):



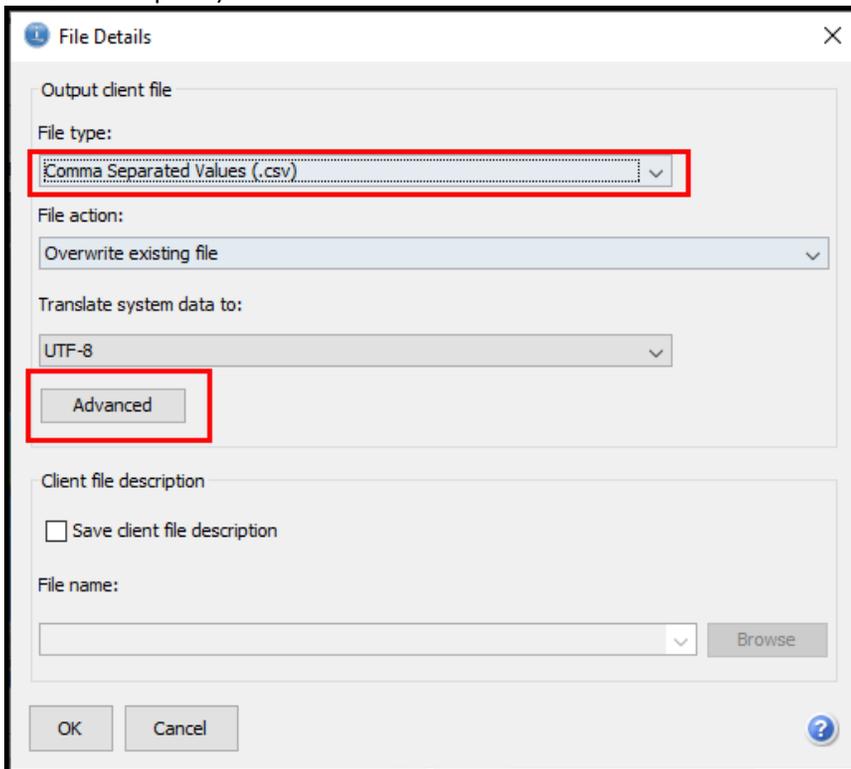
- 5. After selecting the location, enter County_HOTABLE.CSV in the field name (replace the word County with your county name), and then click the Open button:



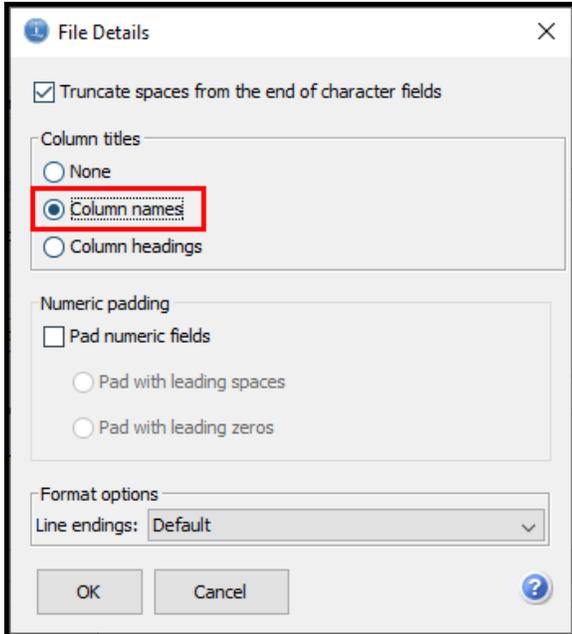
6. You should be back at the main file transfer window. Click the Details button:



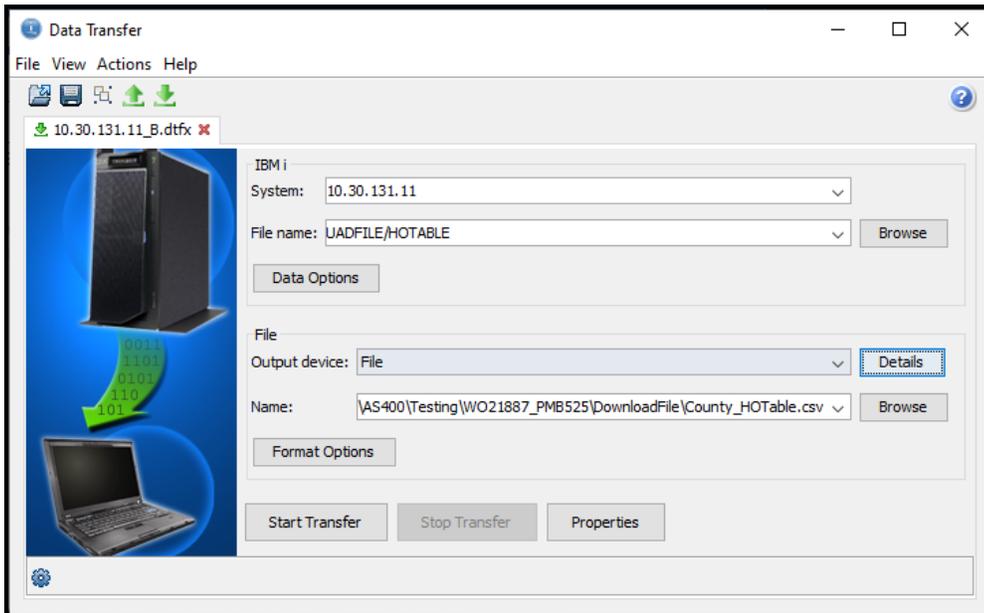
7. If it isn't already selected, choose Comma Separated Values (.csv) for the File Type, and then click the Advanced button. If this doesn't appear in the File Type list, contact TSB for guidance (older versions of the software don't have a .csv option).



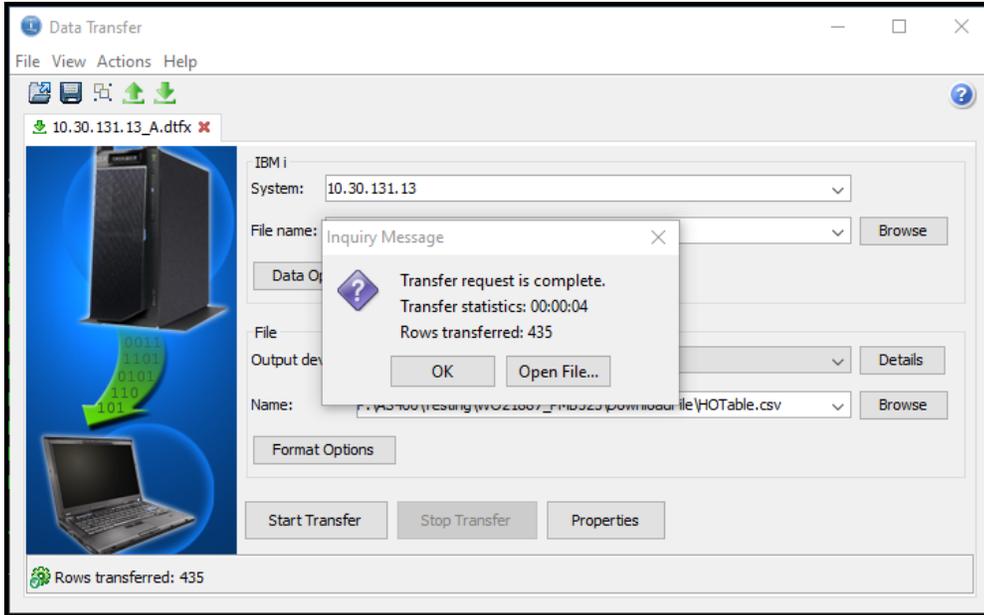
- 8. On the Advanced window (title bar says File Details), choose the Column Names option in the Column Titles section, and then click OK:



- 9. You should be back at the first File Details screen. Click OK, which should take you back to the main transfer window, which should look like this:



10. Click the Start Transfer button. When the file has transferred successfully, you will get a confirmation message that also lists the number of rows transferred.



11. Optional – After clicking OK to close the confirmation message, you can save the Data Transfer settings for future use. We suggest saving this transfer in the same location as the .csv file you’ve just created. In the main transfer window, click on File, then click on Save As. Browse to the folder you want to use, make sure the file name is something that makes sense to you, and click Save.

12. Go to the folder or location that you selected, and find the file. The icon will look similar to an Excel file, and it will be named County_HOTable.csv. Use the document called “Instructions to send HO file to STC.docx” from Janet James to upload the file to the web page that we use to automatically update the Homeowner Database. Contact TSB if if you have questions or if you need a current copy of the “Instructions to send HO file to STC.docx” document.

