# ○ VISION
GOVERNMENT SOLUTIONS

Selecting Fields

The purpose of this document is to assist the user with creating an ad-hoc report using Vision's Report Wizard.

1. Start by clicking **Reports** in the navigation tree on the left-hand side of the screen.
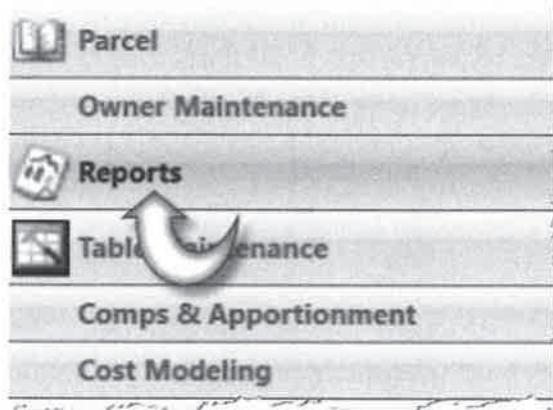
On the main **Report Wizard** page, a list of **TABLES** will be visible.
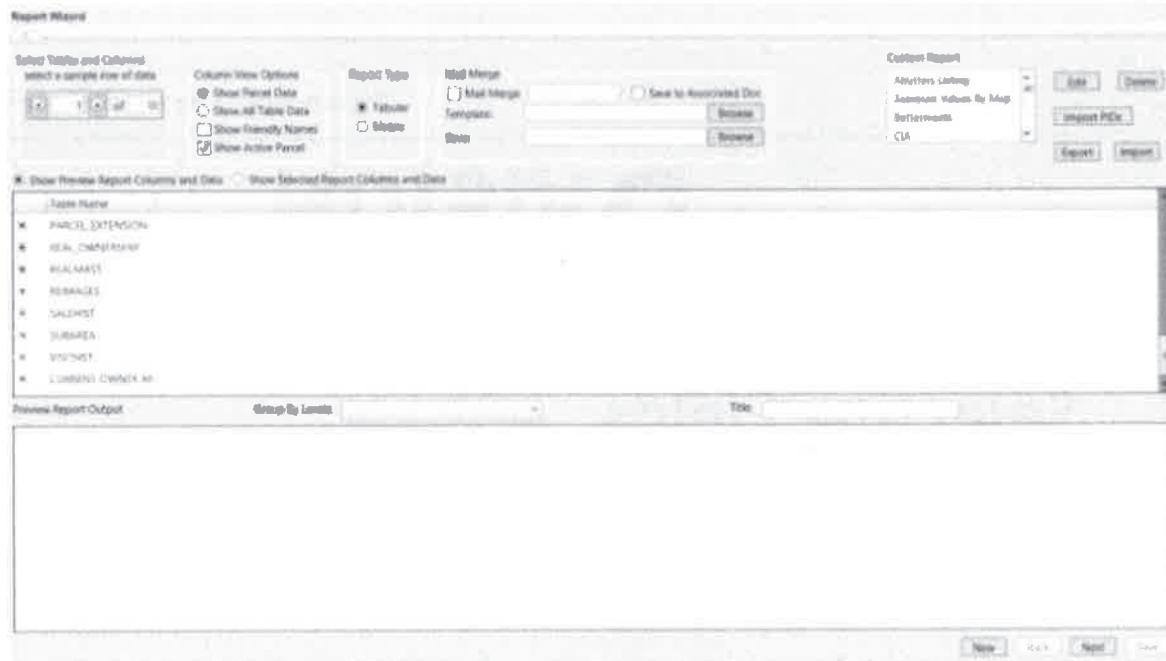
2. Click on the plus sign ⊞ icon that appears next to the table you would like to include in your report to view fields available within that table.

Table Name	
⊞	PARCEL_EXTENSION
⊞	REAL_OWNERSHIP
⊞	REALMAST
	REIMAGES
⊞	SALEHIST
⊞	SUBAREA
⊞	VISITHST
⊞	CURRENT OWNER AN

Preview Report Output
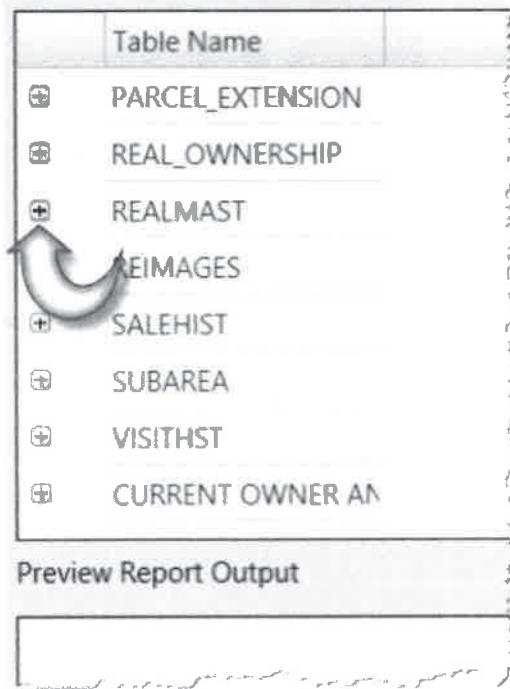
3. Then, click on the boxes to select the individual fields to be displayed on your report.

Table Name			
Include	Filter Only	Column Name	Sample
☐	☐	REM_ACCT_IDX	
☑	☐	REM_ACCT_NUM	10020301
☐	☐	REM_ALT_PRCL_ID	000010020301
☐	☐	REM_ASSOC_PARCEL_ID	
☐	☐	REM_ASSOC_PCT	
☐	☐	REM_BLDG_NAME	
☐	☐	REM_CARD_QUEUE	
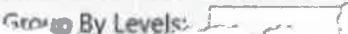
Preview Report Output   Group By Levels:

4. An option to select field alignment is also available by clicking the **Alignment** dropdown and selecting Left, Center or Right.

Table Name								
Include	Filter Only	Column Name	Sample	Formula	Filter	Alignment	Format	Function
☐	☐	REM_ACCT_IDX						
☑	☐	REM_ACCT_NUM	10020301					
☐	☐	REM_ALT_PRCL_ID	000010020301			Left		
☐	☐	REM_ASSOC_PARCEL_ID				Center		
☐	☐	REM_ASSOC_PCT				Right		
☐	☐	REM_BLDG_NAME						
☐	☐	REM_CARD_QUEUE						

Preview Report Output   Group By Levels   Title

5. For any numeric fields, the user may choose a number format by clicking the **Format** dropdown.

In the example below, we selected a currency format for the Total Appraised Value field.

Include	Filter Only	Column Name	Sample	Formula	Filter	Alignment	Format	Function
		PRC_TTL_APPRAIS_OB	5400					
		PRC_TTL_APPRAIS_XF	0					
		PRC_TTL_ASSESS	420600				$#,##0	
		PRC_TTL_ASSESS_ALT	356900					
		PRC_TTL_ASSESS_BLDG	351500					
		PRC_TTL_ASSESS_BLDG_AND_XF						
		PRC_TTL_ASSESS_IMPROVEMENTS						

Format dropdown options: $#,##0.00 / $#,##0 / MM/dd/yy / MM/dd/yyyy / MM/dd/yy hh:mm:ss / 0.000 / 0.0000 / 0.00000 / 0.000000 / 0% / 0.00% / 0.000% / 0.0000%

Preview Report Output   Group By Levels:

REM_PID	REM_ACCT_NUM	REM_PRCL_LOCN	REM_OWN_NAME	PRC_TTL_ASSESS
1	10020301	1 N MAIN ST ST W UNIT		$420,600
2	10020302	2 N MAIN ST ST W UNIT	MICHAEL MILLER	$420,600
3	10020303	3 N MAIN ST ST W UNIT		$420,600
4	10020304	4 N MAIN ST W		$420,600
5	10020305	5 N MAIN ST W		$420,600
6	10020306	6 N MAIN ST ST W UNIT		$420,600
7	10020307	7 N MAIN ST W		$420,600
8	10020308	8 N MAIN ST W		$253,000
9	10020309	9 N MAIN ST W		$253,000

6. As you select fields, a preview of your report will display on the bottom half of the screen under **Preview Report Output.**

Preview Report Output   Group By Levels:

REM_PID	REM_ACCT_NUM	REM_PRCL_LOCN	REM_OWN_NAME	PRC_TTL_ASSESS
1	10020301	1 N MAIN ST ST W UNIT		$420,600
2	10020302	2 N MAIN ST ST W UNIT	MICHAEL MILLER	$420,600
3	10020303	3 N MAIN ST ST W UNIT		$420,600
4	10020304	4 N MAIN ST W		$420,600
5	10020305	5 N MAIN ST W		$420,600
6	10020306	6 N MAIN ST ST W UNIT		$420,600
7	10020307	7 N MAIN ST W		$420,600
8	10020308	8 N MAIN ST W		$253,000
9	10020309	9 N MAIN ST W		$253,000

7. Once you have all of your fields selected, you may change the order of the columns by single left-clicking on the column header and dragging the column to the desired area.

First, click on the column header to be moved and hold the left mouse button down.

Preview Report Output			Group By Levels:	
REM_PID	REM_ACCT_NUM	REM_PRCL_LOCN	REM_OWN_NAME ▾	PRC_TTL_ASSESS
2	10020302	2 N MAIN ST ST W UNIT	MICHAEL MILLER	$420,600
1	10020301	1 N MAIN ST ST W UNIT		$420,600
3	10020303	3 N MAIN ST ST W UNIT		$420,600
4	10020304	4 N MAIN ST W		$420,600
5	10020305	5 N MAIN ST W		$420,600
6	10020306	6 N MAIN ST ST W UNIT		$420,600
7	10020307	7 N MAIN ST W		$420,600
8	10020308	8 N MAIN ST W		$253,000
9	10020309	9 N MAIN ST W		$253,000

Next, while still holding the left mouse button down, drag the selected column to the desired location. The location will be indicated by black arrows.

Preview Report Output			Group By Levels:	
REM_PID	REM_ACCT_NUM	REM_PRCL_LOCN REM_OWN_NAME ▾	REM_OWN_NAME ▾	PRC_TTL_ASSESS
2	10020302	2 N MAIN ST ST W UNIT	MICHAEL MILLER	$420,600
1	10020301	1 N MAIN ST ST W UNIT		$420,600
3	10020303	3 N MAIN ST ST W UNIT		$420,600
4	10020304	4 N MAIN ST W		$420,600
5	10020305	5 N MAIN ST W		$420,600
6	10020306	6 N MAIN ST ST W UNIT		$420,600
7	10020307	7 N MAIN ST W		$420,600
8	10020308	8 N MAIN ST W		$253,000
9	10020309	9 N MAIN ST W		$253,000

Release the left mouse button once the column has reached the desired location. The report columns will be reordered.

Group By Levels: [⌄]

REM_PID	REM_ACCT_NUM	REM_OWN_NAME ▾	REM_PRCL_LOCN	PRC_TTL_ASSESS
2	10020302	MICHAEL MILLER	2 N MAIN ST ST W UNIT	$420,600
1	10020301		1 N MAIN ST ST W UNIT	$420,600
3	10020303		3 N MAIN ST ST W UNIT	$420,600
4	10020304		4 N MAIN ST W	$420,600
5	10020305		5 N MAIN ST W	$420,600
6	10020306		6 N MAIN ST ST W UNIT	$420,600
7	10020307		7 N MAIN ST W	$420,600
8	10020308		8 N MAIN ST W	$253,000
9	10020309		9 N MAIN ST W	$253,000

8. Once all of your fields are added and in the desired order on your report, add a **Title** to your report and click **Next** to view your completed report.

9. The report results will now display.

| ◄ ◄ | 1 | of 1 ► ►| ◄ ◎ ⊙ | ⊕ ▣ ⊡ ◄ ◄ | 100% ▼ | | First | Next |

Report

REM_PI D	REM_ACCT_NUM	REM_OWN_NAME	REM_PRCL_LOCN	PRC_TTL_ASSESS
1	10020301		1 N MAIN ST W	$420,600
2	10020302	MICHAEL MILLER	2 N MAIN ST ST W UNIT	$420,600
3	10020303		3 N MAIN ST W	$420,600
4	10020304		4 N MAIN ST W	$420,600
5	10020305		5 N MAIN ST W	$420,600
6	10020306		6 N MAIN ST ST W UNIT	$420,600
7	10020307		7 N MAIN ST W	$420,600
8	10020308		8 N MAIN ST W	$253,000
9	10020309		9 N MAIN ST W	$253,000
10	100203010		10 N MAIN ST W	$253,000
11	100203011		11 N MAIN ST W	$253,000

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Grouping Data

The purpose of this document is to assist the user in organizing results in the Report Wizard. Report Wizard allows the user to create their own "customized" reports by selecting various TABLES, FIELDS, and SELECTION CRITERIA to adjust the report to suit the requirements. That data can be organized using several method, including using the Group By Levels function.

1. Navigate to the left-hand menu tree, and click on **Reports**
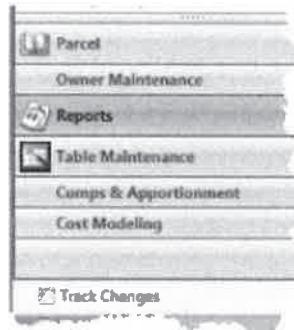
2. In the main **Report Wizard** page, a list of **TABLES** will be visible.

3. Click on the plus sign ⊕ icon that appears next to the table you would like to include in your report to view fields available within that table.

Preview Report Columns and Data:	
	Table Name
⊕	NOTES
⊕	NOTICEHIST
⊕	OBXF
⊕	OTHERASS
⊕	OVRADJ
⊕	PARCEL
⊕	REAL_OWNERSHIP
⊕ ▶	REALMAST
⊕	SALEHIST
⊕	VISITHST

4. Click on the boxes to select the individual fields to be displayed on your report.

Preview Report Columns and Data:		
Table Name		
⊖ REALMAST		
Include	Column Name	Sample
☑	REM_ACCT_NUM	13-3506-37
☐	REM_ALT_PRCL_ID	
☐	REM_ASSOC_PARCEL_ID	
☐	REM_ASSOC_PCT	
☐	REM_BLDG_NAME	
☐	REM_CROSS_STREET_1	
☐	REM_CROSS_STREET_2	
☐	REM_FIELD_REVIEW	0

5. An option to select field alignment is also available by clicking the **Alignment** dropdown and selecting Left, Center or Right.

6. For any numeric fields, the user may choose a number format by clicking the **Format** dropdown.

In the example below, we selected a currency format for the Total Appraised Value field.

7. As you select fields, a preview of your report will display on the bottom half of the screen under **Preview Report Output.**

8. Click on the drop box **Group By Levels** to group the report results. These levels are not the column numbers, just the number of time a report grouping can be defined.

	Preview Report Output	Group By Levels:			⌄

	REM_PRCL_ID	REM_ACCT_NUM	REM_PRCL_LOCN	REM	No GroupBy
	1	10020301	1 N MAIN ST ST W UNIT		1
	2	10020302	2 N MAIN ST ST W UNIT	MI	2
	3	10020303	3 N MAIN ST ST W UNIT		3
	4	10020304	4 N MAIN ST W		4
	5	0020305	5 N MAIN ST W		5 / 420500

9. Choose the number of levels you wish the report to be grouped, give the report a title, and click the **Next** button in the lower right-hand corner of the page. (In this instance, the report will only be grouped by 1 level).

10. The parcel information will appear. In this instance, the information is grouped by PID, as indicated in the Group 1 indicator box.

- By using the drop-box next to the field name, a user can adjust the grouping based upon the tables originally selected.

11. Select the field by which you wish to group the information, and click on the **View Report** button in the upper right-hand section of the page. Here the field PRC_TTL_ASSESS is selected.

12. The report now displays grouped by the PRC_TTL_ASSESS values (in the image, Zero values are grouped together followed by 95,000, 126,900, etc.)

Report Wizard

Group 1 PRC_TTL_ASSESS ▾

Ⅰ◀ 1 of 1 ▸ ▸Ⅰ ↔ ⊗ 🔍 🖨 ☐ ⫘ 🔍 ▾ 100% ▾ [   ] Find : Next

ASSESSED VALUES

PRC_TT L_ASSE SS	REM_PI D	REM_ACCT_NUM	REM_PRCL_LOCN	OWN_NAME1	PRC_TTL_ASSESS
⊟					0
	26	100203026	26 N MAIN ST W	MICHAEL MILLER	
	27	100203027	27 N MAIN ST W	MICHAEL MILLER	
Total	53				
⊟ 95000					0
95000	32	100203032	32 N MAIN ST ST W UNIT	MICHAEL MILLER	95000
95000	33	100203033	33 N MAIN ST W	MICHAEL MILLER	95000
95000	34	100203034	34 N MAIN ST W	MICHAEL MILLER	95000
95000	35	100203035	35 N MAIN ST W	MICHAEL MILLER	95000
95000	36	100203036	36 N MAIN ST W	MICHAEL MILLER	95000
Total	170				475000
⊟ 126900					0
126900	22	100203022	22 N MAIN ST W A	MICHAEL MILLER	126900
126900	23	100203023	23 N MAIN ST ST W UNIT #A	MICHAEL MILLER	126900
126900	24	100203024	24 N MAIN ST W A	MICHAEL MILLER	126900
126900	25	100203025	25 N MAIN ST W A	MICHAEL MILLER	126900

By scrolling down to the bottom of the report, the user can see how many parcels are included in the Grouped Report.

If the user wishes to re-group the report by a different field, or add more levels of grouping, simply click the **Back** button to change the conditions of the report layout.

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13. Change the Grouping Level as desired and click Next

14. Select the fields by which you wish to group the information, and click on the **View Report** button in the upper right-hand section of the page. In this case, PRCL_TTL_ASSESS, then OWN_NAME1, and finally, REM_ACCT_NUM
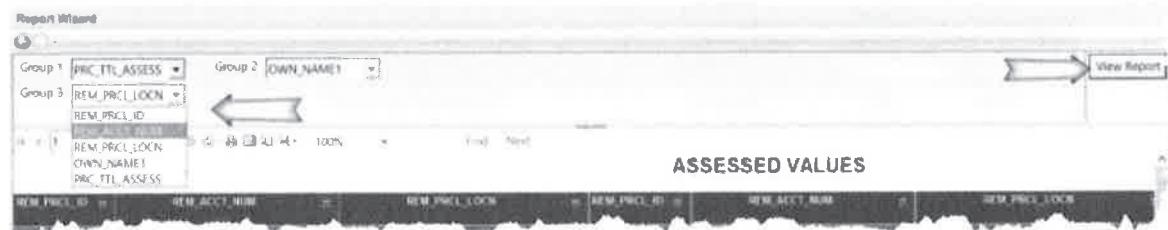
15. The report will now display grouped by the previously selected fields:

| Group 1 | PRC_TTL_ASSESS ▾ | Group 2 | OWN_NAME1 ▾ | | | View Report |
| Group 3 | REM_ACCT_NUM ▾ | | | | | |

of 27 ▸ ▸ ◂ 44 ▣ 44 ◂ 100% ▸   Find Next

ASSESSED VALUES

PRC_TTL_ASS ESS	OWN_NAME1	REM_ACCT_NUM	REM_PRCL_ID	REM_ACCT_NUM	REM_PRC1_LOCN
	①	②	③		
	MICHAEL MILLER				
	MICHAEL MILLER	100203026	26	100203026	26 N MAIN ST
	MICHAEL MILLER	100203027	27	100203027	27 N MAIN ST
Total					
95000					
	MICHAEL MILLER				
95000	MICHAEL MILLER	100203032	32	100203032	32 N MAIN ST ST W UN
95000	MICHAEL MILLER	100203033	33	100203033	33 N MAIN ST
95000	MICHAEL MILLER	100203034	34	100203034	34 N MAIN ST

New   ‹ Back   Next ›   Save

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Using Selection Criteria

The purpose of this document is to assist the user in modifying a report to target specific results through selection criteria. Each criteria operator will be reviewed to explain how it can be used to limit data returned to the desired information.

Before adding selection criteria to a report it is recommended to first add all of the fields to be used. For assistance with this process, see the **Selecting Fields** document.

1. The first example will be using the **Equals (=) operator**. This report will be modified to target parcels with a specific model code of 01 Residential.

2. Select the **table** containing the **field** for the selection criteria.

The CONSTR table contains the CNS_MDL field we will be using for this example.

	Table Name	
⊞	ASSHIST	
⊞	BLDG	
⊞	BLDGPERM	
⊞ ▶	CONSTR	
⊞	CONSTRCDM	
⊞	CONSTRCDU	
⊞	CONSTRCOM	
⊞	CONSTRDEP	

3. Click on the **plus** ⊞ sign to expand the table and find the field CNS_MODEL (construction model).

Table Name						
CONSTR						
Include	Filter Only	Column Name	Sample	Formula	Filter	Alignm
		CNS_ALT_CODE_1				
		CNS_ALT_CODE_2				
		CNS_ALT_COMPLETE_1				
		CNS_ALT_COMPLETE_2				
		CNS_ALT_ISSUED_1				
		CNS_ALT_ISSUED_2				

4. Scroll through the available fields until the desired field is located. To begin adding selection criteria for the field concerned, **double left-click** on the **filter** column for this field.

Table Name						
Include	Filter Only	Column Name	Sample	Formula	Filter	Align
		CNS_IS_EXE1_PCT	100			
		CNS_IS_EXE2	0			
		CNS_IS_EXE2_PCT	100			
		CNS_IS_VACANT	0			
		CNS_MDL	01			
		CNS_MDL_DESC	Residential			
		CNS_MNC	99999			

The **Report Wizard Filter** box will appear.

Report Wizard Filter

Include	Operator	Value	AND/OR
☐	=		OR
☐	<		OR
☐	< =		OR
☐	>		OR
☐	> =		OR
☐	< >		OR
☐	BETWEEN		OR
☐	LIKE		OR
☐	NOT LIKE		OR
☐	IN		OR
☐	NOT IN		OR
☐	IS NULL		OR
☐	IS NOT NULL		OR

Save   Cancel
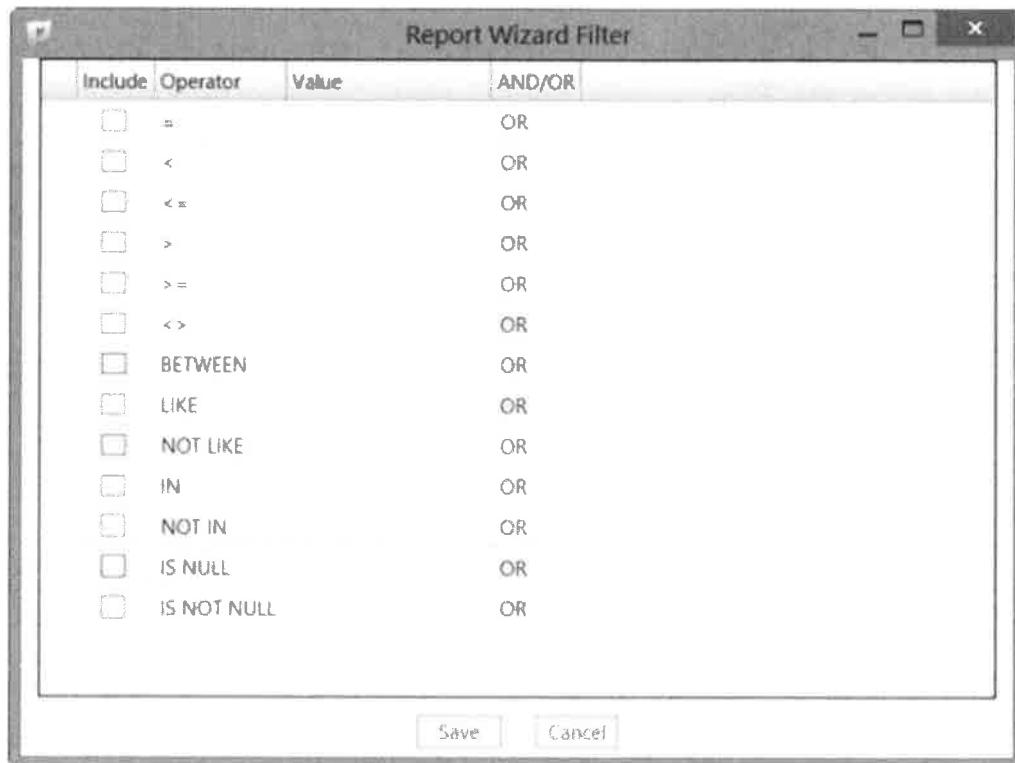
5. To utilize the = modifier, first check the **Include** box for the operator. Then enter the **Value** to be targeted. Once this has been completed, click **Save**.

In this example we are only targeting parcels with a model code of 01.

Note: When using the = operator, the **Value** entered needs to exactly match how the data is entered in the database. For example, if we entered only 1 instead of 01 using = as the operator, no parcels with 01 model codes would return in the results.

Report Wizard Filter

Include	Operator	Value	AND/OR
☑	=	01	OR
			OR
☐			OR
☐	>		OR
☐	> =		OR
☐	< >		OR
☐	BETWEEN		OR
☐	LIKE		OR
☐	NOT LIKE		OR
☐	IN		OR
☐	NOT IN		OR
☐	IS NULL		OR
☐	IS NOT NULL		OR

Save   Cancel
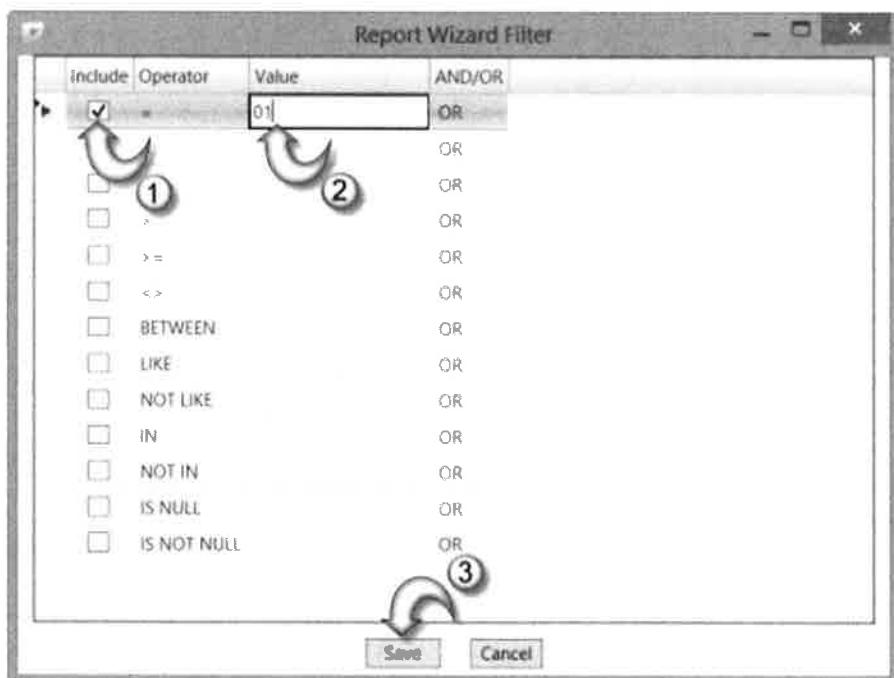
6. The custom selection criteria will then be displayed in the **Filter** column for the selected field. Report results will now only include those parcel with a build that has a model code of 01.

The next example will illustrate the **Greater Than (>), Less Than (<), Greater Than/Equal To (>=),** and **Less Than/Equal To (<=)** operators.

7. In the Report Wizard **Filter** box, left-click on the **Include** box to the left of the > operator. Then, enter a value in the **Value** field. For example, we'll search for parcels where the Model is **Greater Than (>) 94**. Then, click **Save** to add the filter.
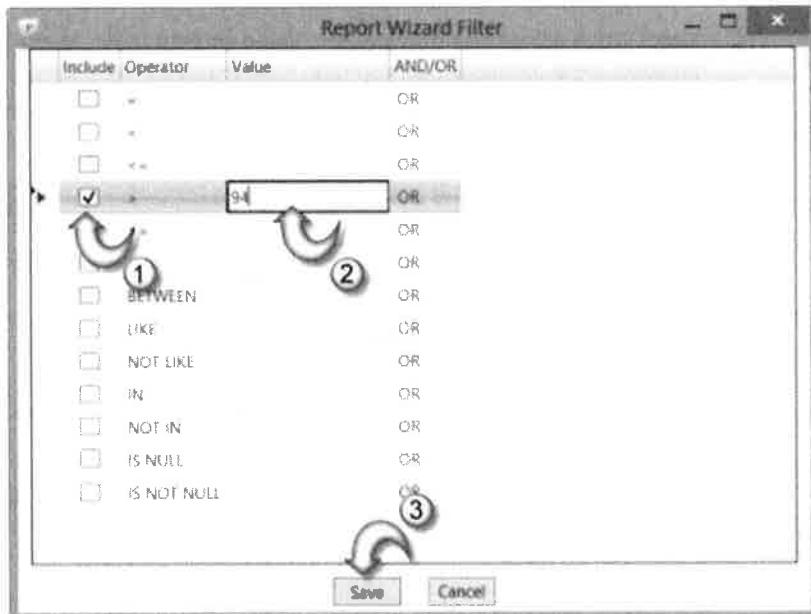
Conversely, **Less Than (<)** could be used to target values smaller than 94 to get a different selection.

8. You may also use **Greater Than/Equal To (>=)** or **Less Than/Equal To (<=)** to include the **Value** entered in the results. In the example below parcels with a total assessed value of $10,000.00 or greater will be targeted.

Include	Operator	Value	AND/OR
☐	=		OR
☐	<		OR
☐	<=		OR
☐	>		OR
☑	>=	10000	OR
☐	<>		OR
☐	BETWEEN		OR
☐	LIKE		OR
☐	NOT LIKE		OR
☐	IN		OR
☐	NOT IN		OR
☐	IS NULL		OR
☐	IS NOT NULL		OR

Report Wizard Filter

Save   Cancel
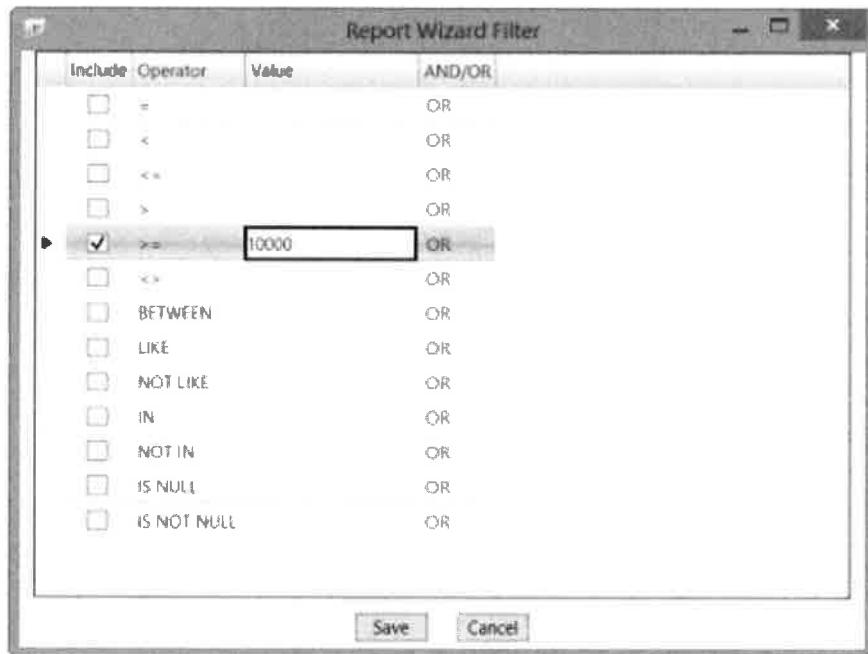
9. The **Greater Than/Equal To (>=)** and **Less Than/Equal To (<=)** can be used together to create a range. In the below example, parcels with a total assessed value of $10,000.00 and less than $1,000,000.00 Will be targeted.

Note: When using multiple selection criteria for one field, change the **AND/OR** column value to **AND**.
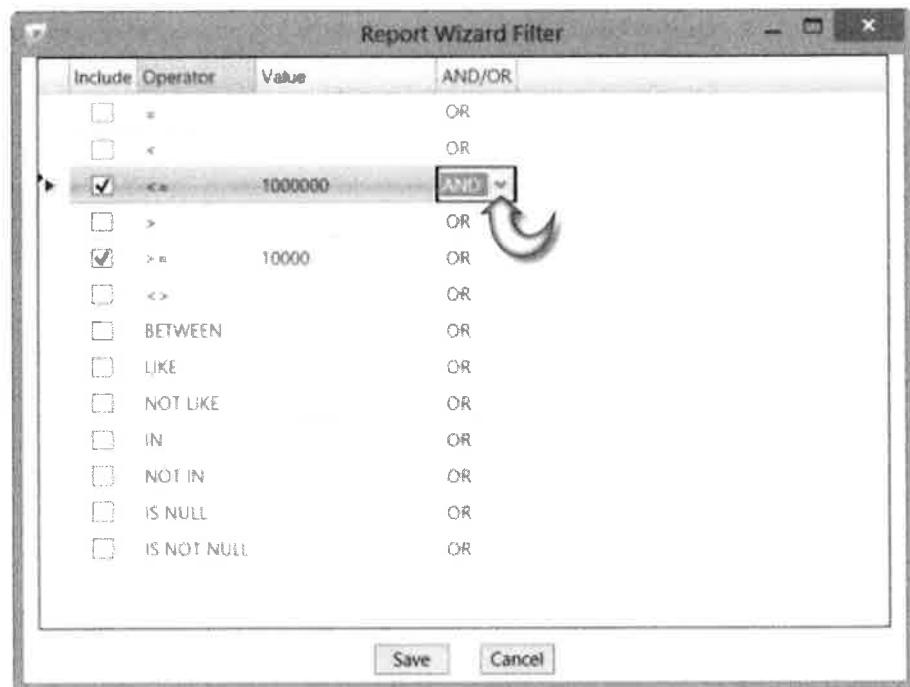
10. In some instances, we may want the operators to work separately. In the example below, the selection criteria will narrow results to parcels with Land Use Code **Greater Than/Equal To (>=)** OR **Less Than/Equal To (<=)** 94. Results would exclude any parcels that do not meet either of these two criteria.
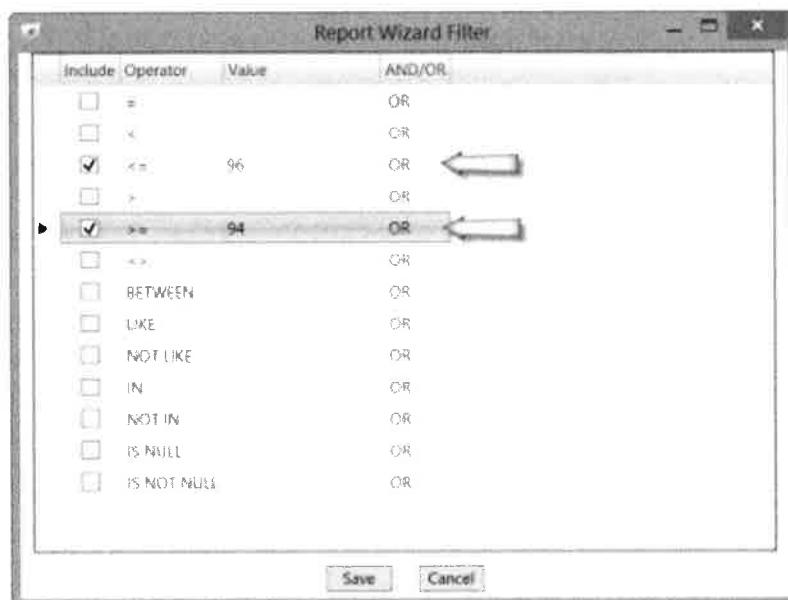
11. The next operator, **Not Equal To (<>),** is used to exclude one specific value. In the example below, the **Not Equal To (<>)** operator is used with the Model field to exclude parcels within Model 01.
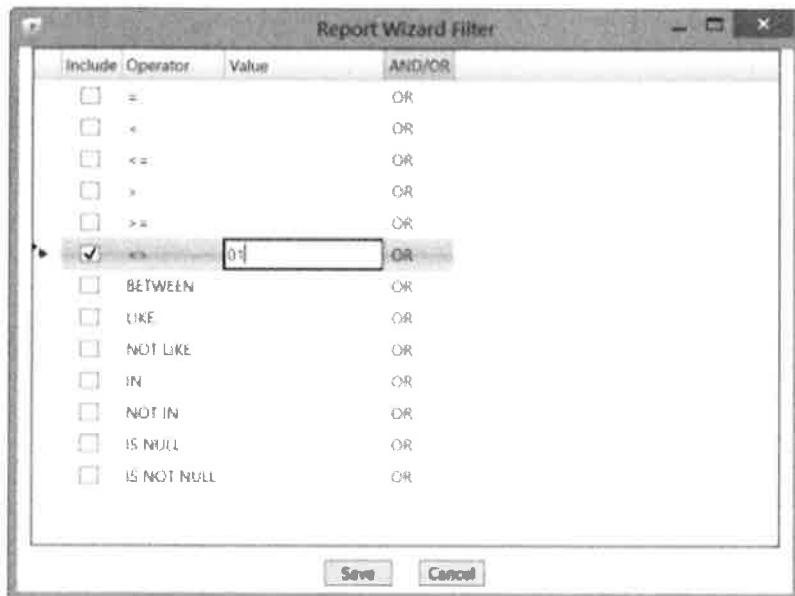
12. The next operator, **Between,** is used to narrow results to parcels between two specific values. To use the **Between** operator, left-click the box to activate the operator, then enter the two values separated by a comma and no spaces. Then, click **Save**.

- In this example, we added criteria to the Actual Year Built field. This field is found in the CONSTRDEP table and the field called CNS_AYB. The following criteria would result in only parcels with an Actual Year Built between 1995 and 2005.
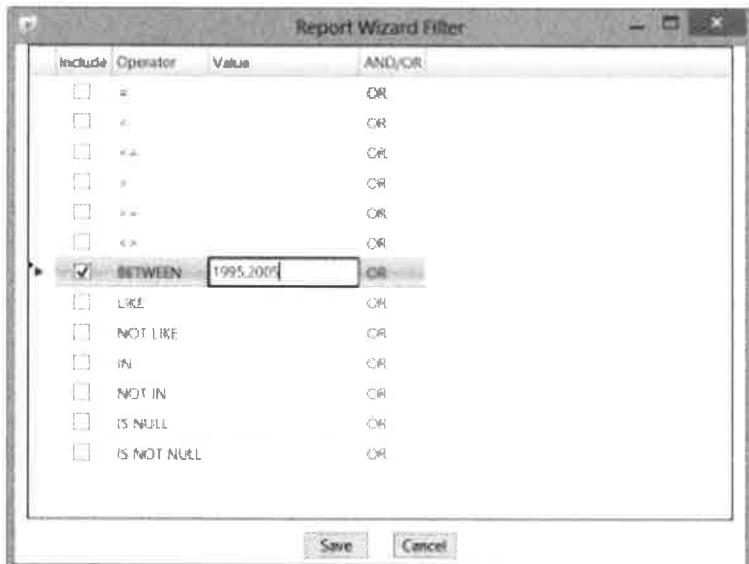
13. The next two operators, **Like** and **Not Like**, allow the user to use the symbol **%** as a wildcard. This wild card will allow the results returned to be similar/dissimilar to the criteria entered.

14. For example, using the Construction Model field, the selection below using the **Like** operator would include any parcels with a Construction Model beginning with **"0"**.
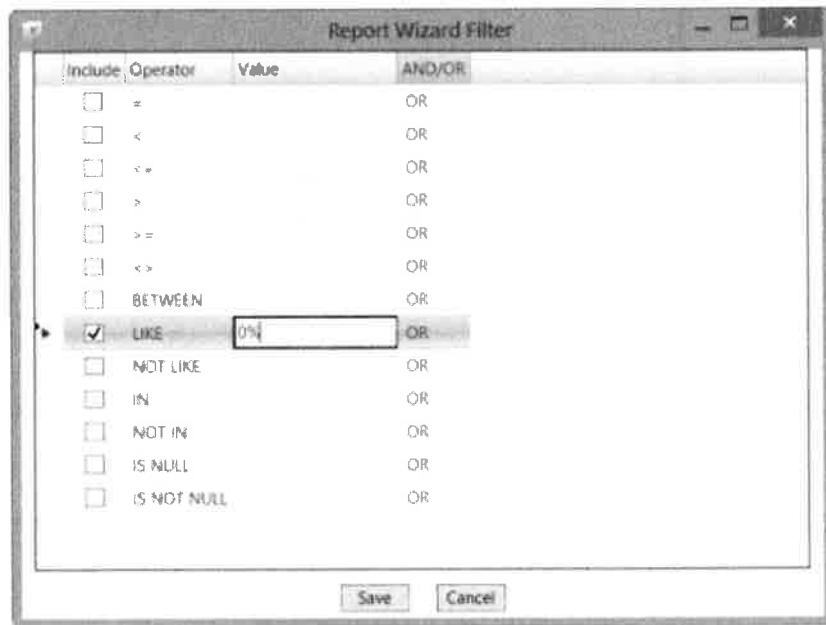
15. In the next example, we used the **Not Like** operator, utilizing the **%** wildcard with the Owner Name field, to exclude any parcels where the Owner Name field includes the word "CITY". The Owner Name field is located in the REALMAST table and the field name is REM_OWN_NAME.
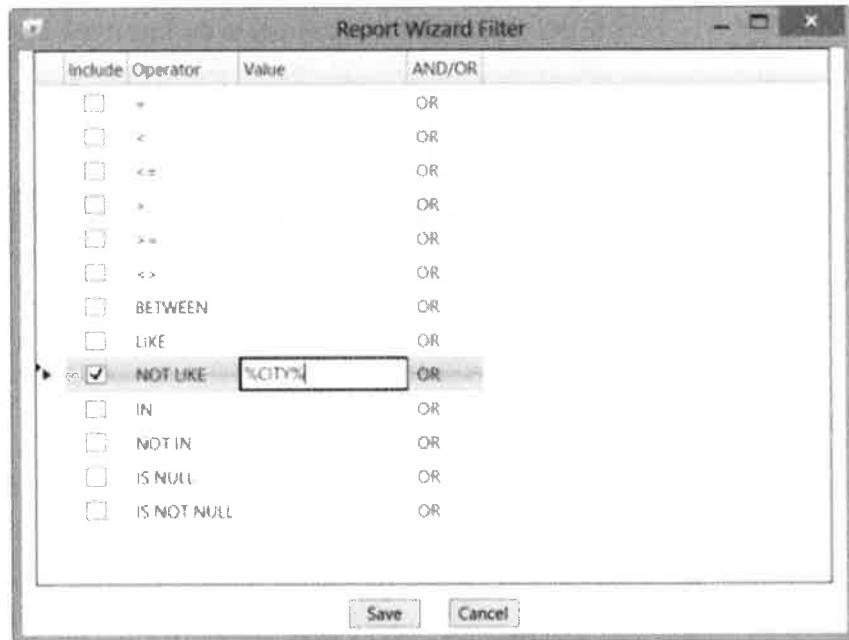
16. The **In** and **Not In** operators allow the user to select multiple values to either include or exclude from their report. Similar to other operators, to use the **In** or **Not In** operator, double-left click in the Filter column within the field to which you wish to add criteria.

17. Place a check in the box to activate the **In** operator, enter the value(s) to be included and click **Save**. In this example, we only included parcels with a Construction model of 94, 95, and 96.
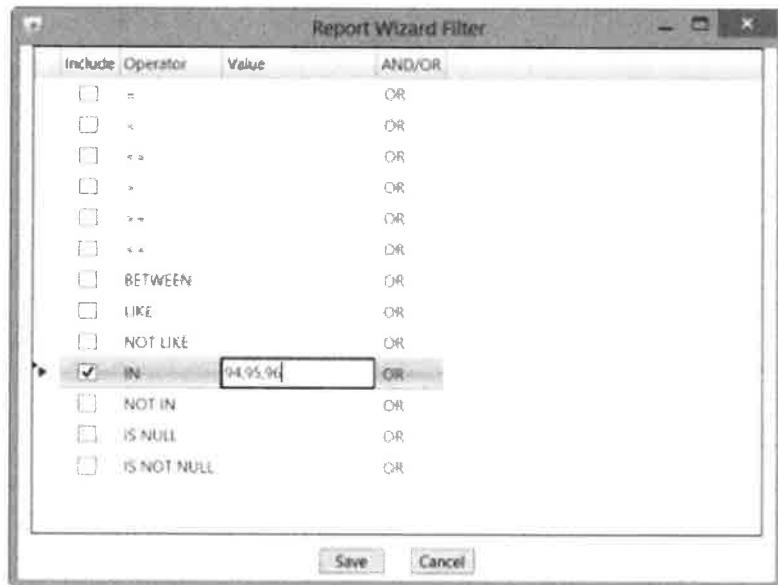
18. Similarly, the **Not In** operator can be used to exclude parcels with a Construction Model of 94, 95, and 96.
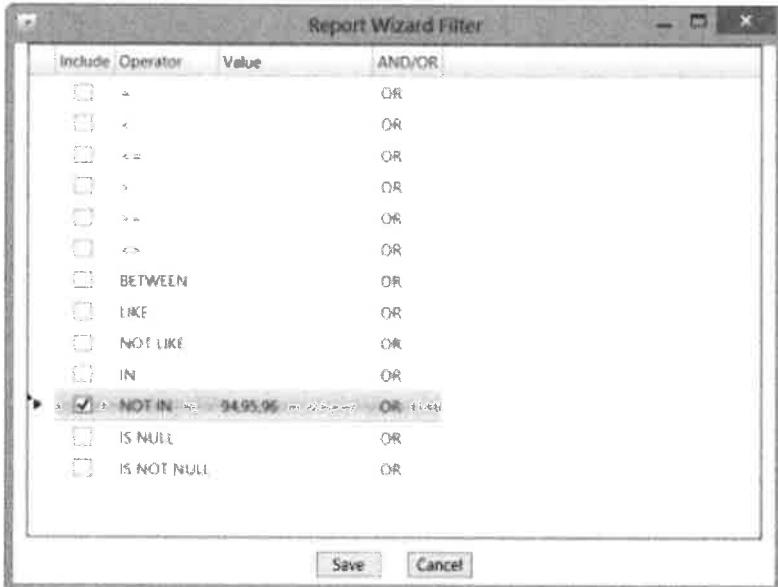
19. The last two operators to filter field criteria are **Is Null** and **Is Not Null.** These two operators simply narrow results based upon a specific field being **Null** (blank) or **Not Null** (populated with a value). In this example, we will search for parcels where the Land Zone field is **Null** (blank).

20. Double left-click in the **Filter** area for the selected field; in this case, navigate to the LAND table and select the LND_ZONE field, and simply check the box to activate the **Is Null** operator, then click **Save.** *No Value is required with the Is Null or Is Not Null operators.*
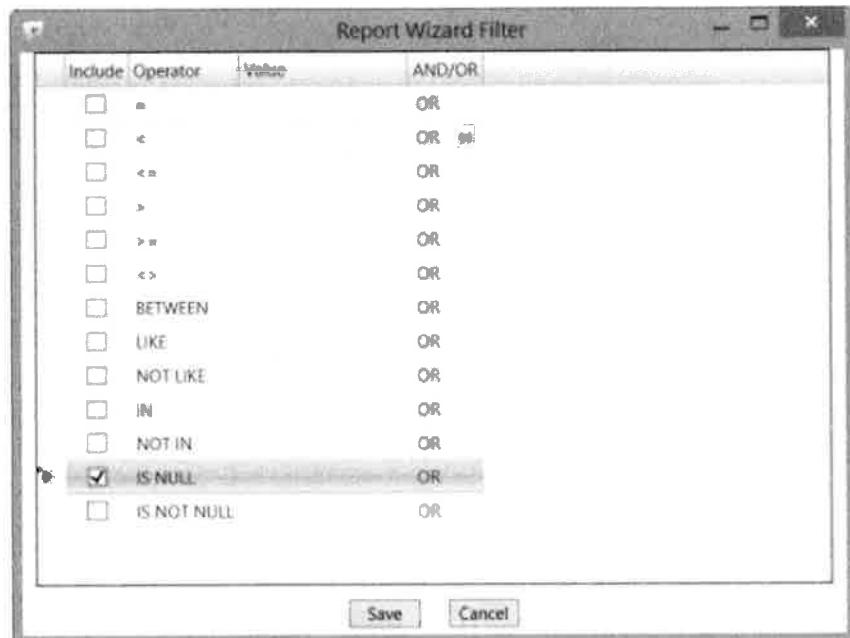
Once the desired Selection Criteria are entered, the report can be viewed/saved by following the instructions detailed in the document titled **Report Wizard - Saving and Opening Reports.**

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Navigating Results

This document will walk the user through manipulating the output of Reports created in Report Wizard in Vision 8.

Once a report has been created and been previewed, there are multiple ways to sort and navigate through the results. On the report preview screen, the following information will display:

- The information from the **fields** you selected for the parcels that fit the **criteria**.
- The report will be sorted as you indicated on the **Select Tables and Columns** screen.
- The report will have the same **headers**, **text alignment** and **title**.
- On the last page, you will see a total parcel count and any formulated totals (**Sum, Average, Median**, etc).

M ◄ 1 of 1 ► M | ✛ ⊗ ⊕ | 🖶 🗋 ⥥ ◄ ▾ | 100% ▾ | [ ] Find | Next

APPRAISED VALUES

REM_ACCT_NUM	REM_PRCL_LOCN	REM_OWN_NAME	PRC_TTL_APPRAIS
10020301	1 N MAIN ST W		420580
100203010	10 N MAIN ST W		252960
100203011	11 N MAIN ST W		252960
100203012	12 N MAIN ST W		252960
100203013	13 N MAIN ST ST W UNIT	MICHAEL MILLER	252960
100203014	14 N MAIN ST ST W UNIT		252960
100203015	15 N MAIN ST W		252960
100203016	16 N MAIN ST W		252960
100203017	17 N MAIN ST W		252960
100203018	18 N MAIN ST ST W UNIT #A		155080
100203019	19 N MAIN ST W A		155080
10020302	2 N MAIN ST ST W UNIT	MICHAEL MILLER	420580
100203020	20 N MAIN ST W A		155080
100203021	21 N MAIN ST W A		155080
100203022	22 N MAIN ST W A		126880
100203023	23 N MAIN ST ST W UNIT #A		126880

🛈 The report will indicate 1 of 2? pages. To see the actual number of pages, use the **arrows** at the top to go forward or backward pages. The blue arrow with a vertical bar furthest to the right will take you to the very last page.

M ◄ 1 of 1 ► M | ✛ ⊗ ⊕ | 🖶 🗋 ⥥ ◄ ▾ | 100% ▾ | [ ] Find | Next

APPRAISED VALUES

REM_ACCT_NUM	REM_PRCL_LOCN	REM_OWN_NAME	PRC_TTL_APPRAIS
	1 N MAIN ST		4?0F'

🛈 The scaling of the report preview can be adjusted by left-clicking on the zoom box and choosing a different level. The zoom level will always default to 100%.

Report Wizard
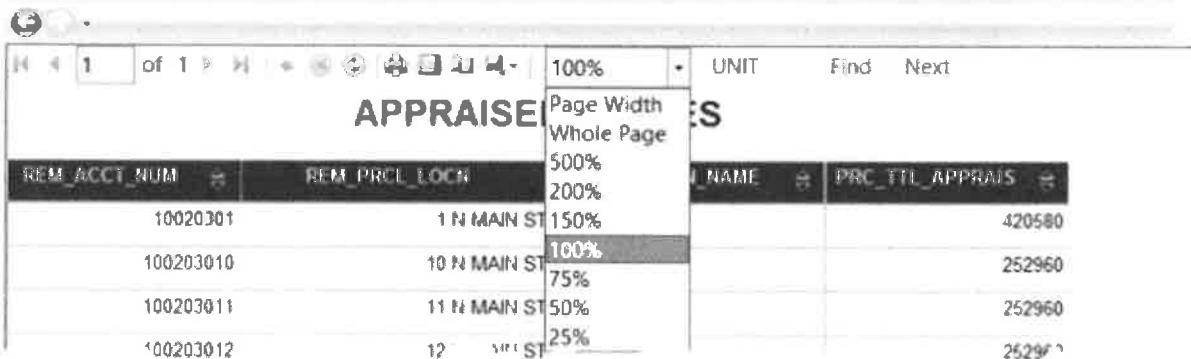
REM_ACCT_NUM	REM_PRCL_LOCN		NAME	PRC_TTL_APPRAIS
10020301	1 N MAIN ST	150%		420580
100203010	10 N MAIN ST	100% / 75%		252960
100203011	11 N MAIN ST	50%		252960
100203012	12 N MAIN ST	25%		25296?

(Zoom dropdown: Page Width, Whole Page, 500%, 200%, 150%, 100%, 75%, 50%, 25%) — 100% UNIT Find Next

APPRAISED VALUES

You may search the report for a specific value by entering the value to search in the search box and clicking **Find.** Additional items with the same value will be found by clicking **Next.**

Report Wizard

100% · UNIT Find Next

APPRAISED VALUES

REM_ACCT_NUM	REM_PRCL_LOCN	REM_OWN_NAME	PRC_TTL_APPRAIS
10020301	1 N MAIN ST W		420580
100203010	10 N MAIN ST W		252960
100203011	11 N MAIN ST W		252960
100203012	12 N MAIN ST W		252960
100203013	13 N MAIN ST ST W UNIT	MICHAEL MILLER	252960
100203014	14 N MAIN ST ST W UNIT		252960

You can click on the **printer icon** to print the report.

Report Wizard
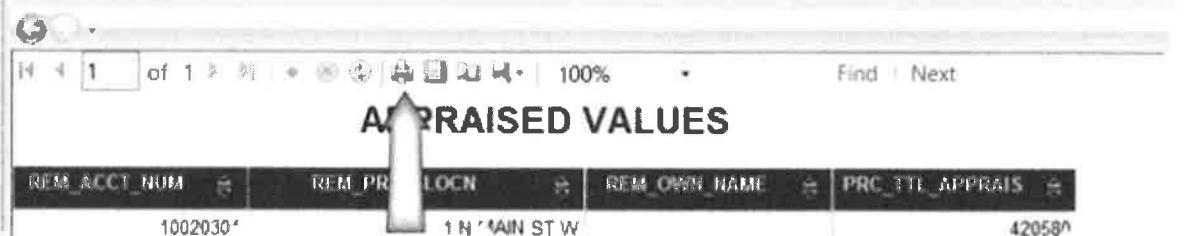
100% · Find Next

APPRAISED VALUES

REM_ACCT_NUM	REM_PRCL_LOCN	REM_OWN_NAME	PRC_TTL_APPRAIS
1002030?	1 N MAIN ST W		42058?

Individual columns on the report may be sorted by clicking the arrows to the right of the column header.

Report Wizard

APPRAISED VALUES

REM_ACCT_NUM ⇕	REM_PRCL_LOCN ⇕	REM_OWN_NAME ⊙	PRC_T
10020301	1 N MAIN ST W		
100203010	10 N MAIN ST W		
100203011	11 N MAIN ST W		
100203012	12 N MAIN ST W		
100203015	15 N MAIN ST W		
100203016	16 N MAIN ST W		

Saving and Opening Reports

The purpose of this document is to assist the user in saving a custom report to be open and run at a later date. The report will always pull the most current results for the selected fields when run.

1. Once you have chosen your Tables and Fields to be included and entered a **Title** for your report, click on the **Next** button to preview your report. See the **Selecting Fields** document for more information.

2. View your report preview, and then click on the **Next** button.

3. Finally, name your report and click **Save** in the bottom-right hand corner of the screen.

4. The next time **Report Wizard** is launched, the newly-created report template will be available in the **Custom Report** list.
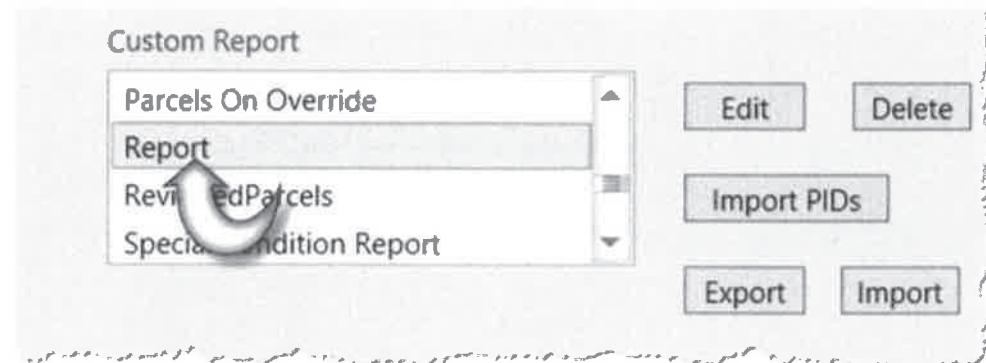
5. To **Open** a Custom Report Template, click on the desired report in the **Custom Report** list, and then click on the **Edit** button.
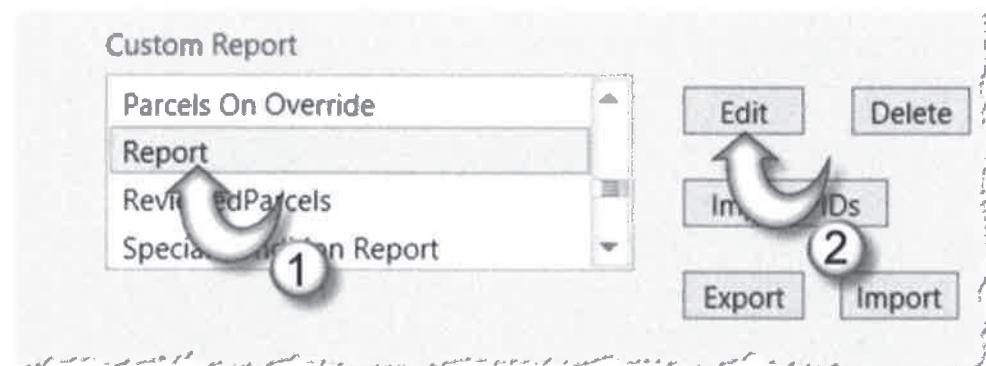
6. The specifications from the previously saved report will be selected.

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Saving Report as a CSV file

After creating and previewing a report, you have the option to export the data into a .csv (comma separated values) format. This allows the user to open the report in Microsoft Excel to further manipulate the data.

To export a report to .csv format, follow these steps.

1. From the **Report Preview** screen, click the blue **Export** icon.
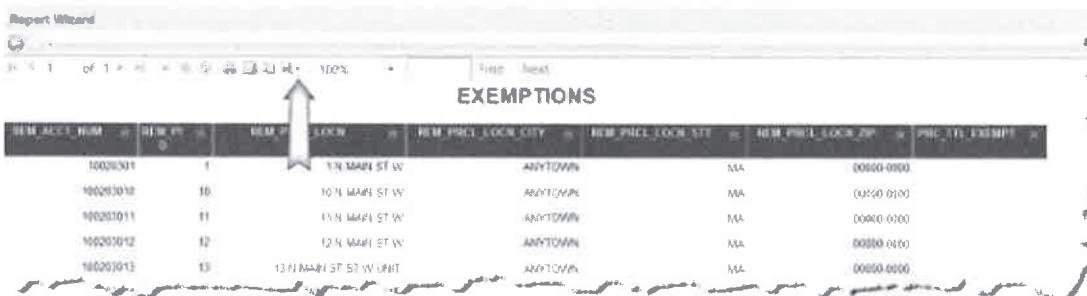
2. A dropdown-list will appear. Choose the **CSV (comma delimited)** option.
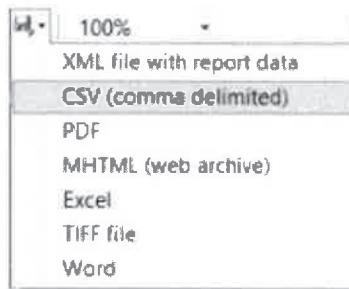
3. At this point, you will be prompted to **Save** the .csv file to a particular location (in this example, it will be saved to the Desktop).
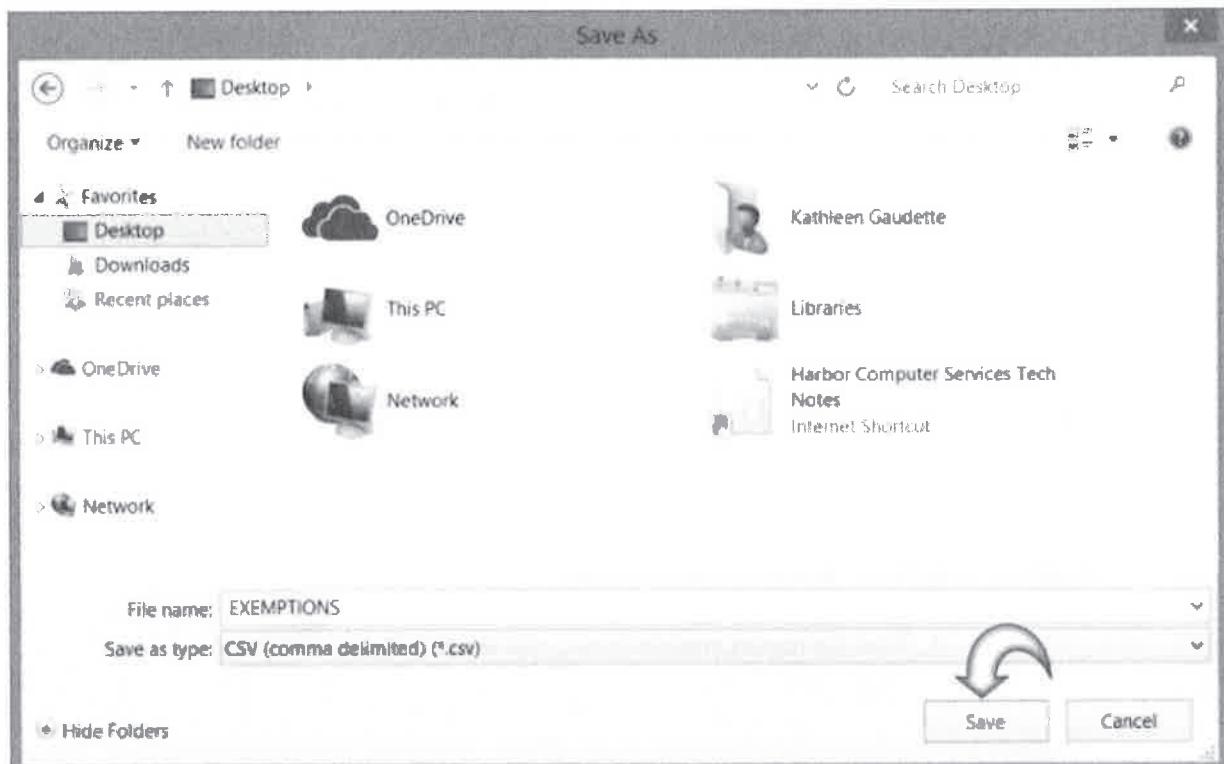
5. Navigate to where the file was saved. The icon indicates it can be opened with MS Excel.
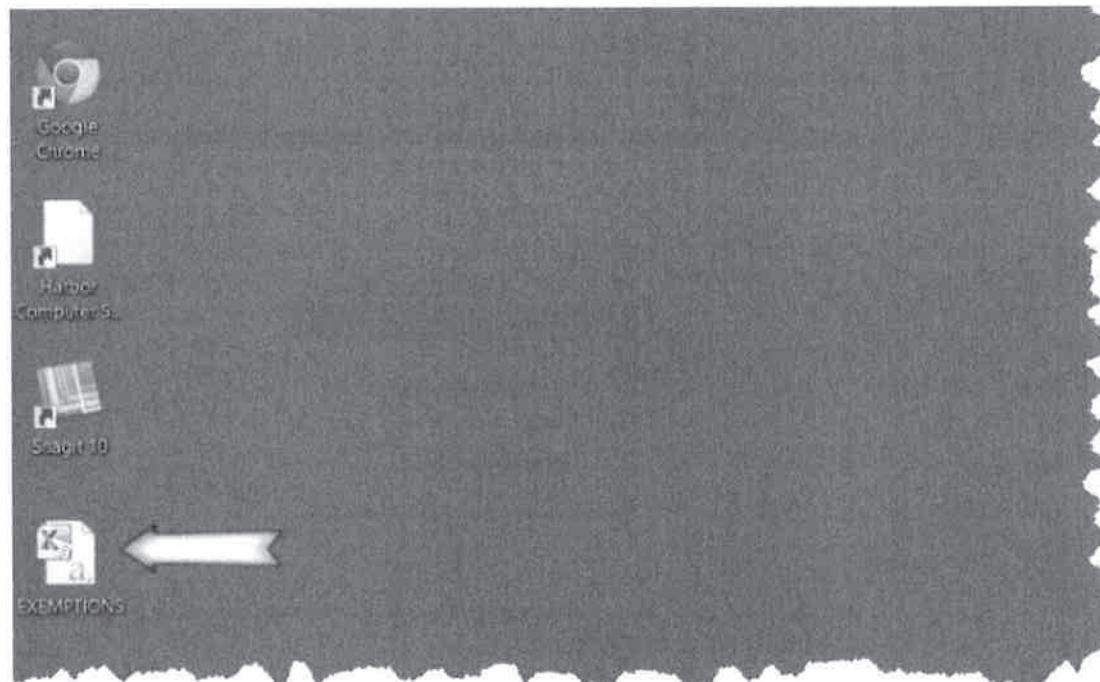
6. Double-click the icon to open the file and work with the data.

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Saving Report as a PDF file

After creating and previewing a report, you have the option to **export** the data into a .pdf document. This allows the user to open and save the report in a portable document format.

To export a report to .pdf format, follow these steps.

1. From the report preview screen, click the blue **Export** icon.
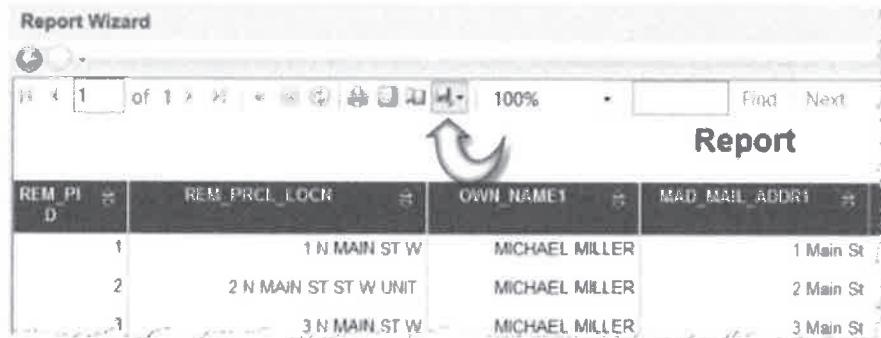
2. A dropdown-list will appear. Choose the **PDF** option.
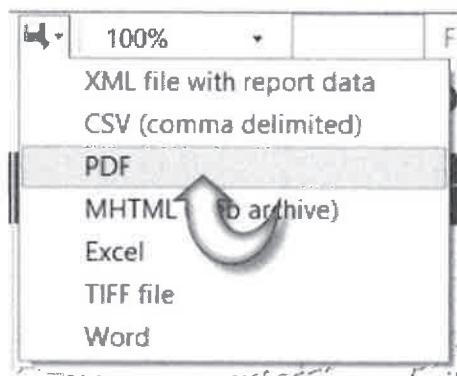
3. Depending upon the size of the file, a message may appear while the file is being exported.

4. Once the export has completed, a **Save As** window will appear. Navigate to the folder where the file is to be saved.
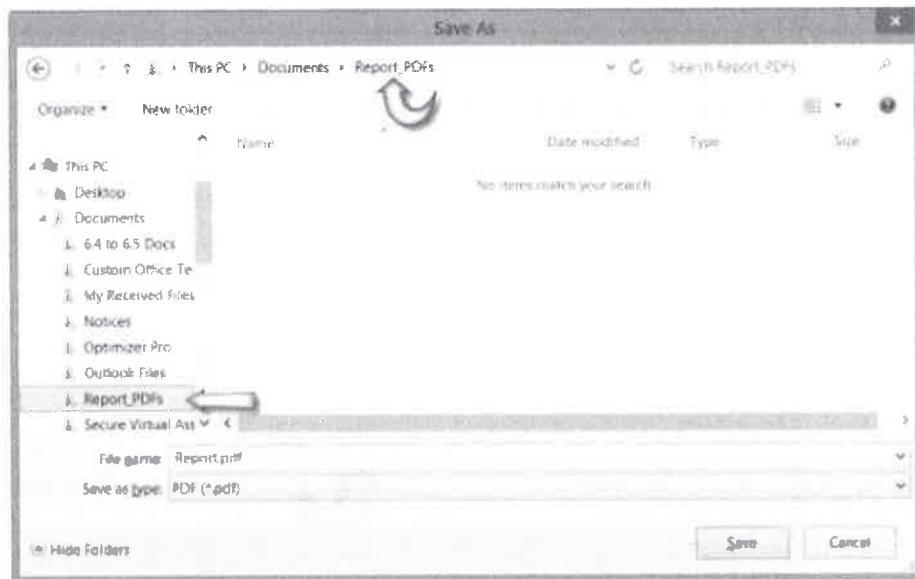
5. Name the file and click **Save**.
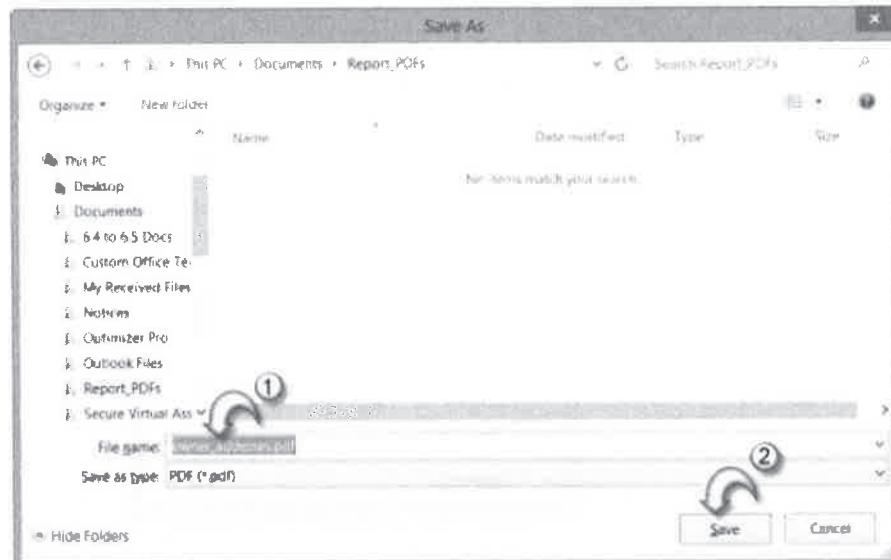
6. Navigate to where the file was saved then open the file by double-clicking or right-click then selecting open.
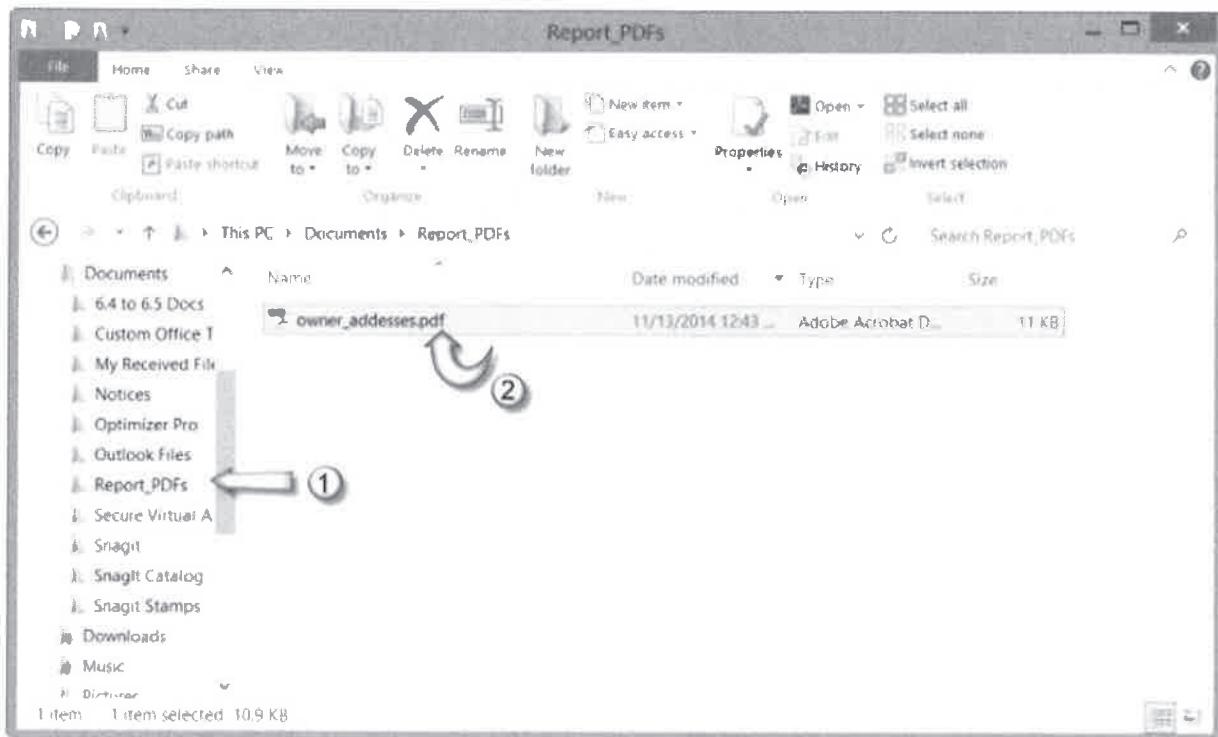
7. The report results will be displayed in the default PDF viewer program.
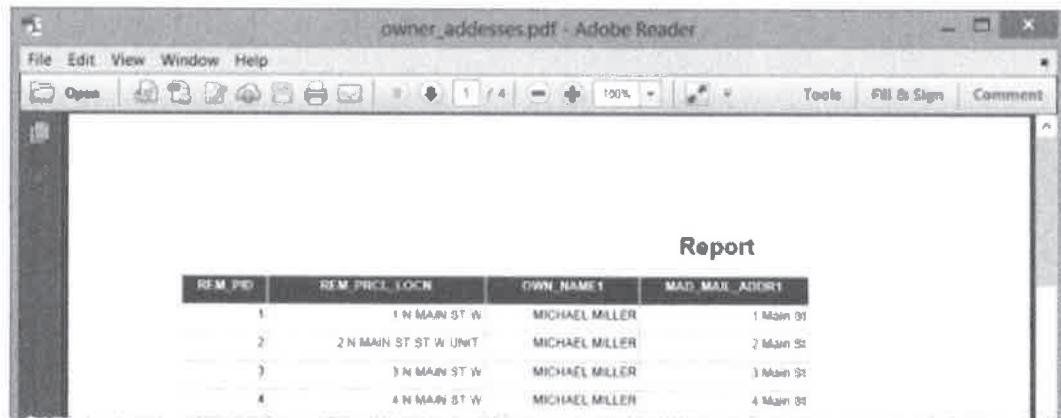
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Save, Import, or Export an RDL File

This document is intended to assist the user with saving, importing, and or exporting an RDL (template) file created once an ad-hoc report is created in Vision's Report Wizard.

Saving an RDL File
Begin by clicking **Reports** in the navigation tree on the left-hand side of the screen.
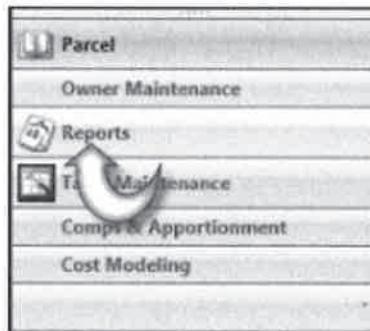
From the **Select Tables and Columns** section, identify the tables and related columns necessary to create the custom report.

1. From the main **Report Wizard** page, determine the TABLES required from the list provided.

2. Click on the plus sign ⊕ icon that appears next to the table you would like to include in your report to view fields available within that table.

	Table Name
⊕	NOTES
⊕	NOTICEHIST
⊕	OBXF
⊕	OTHERASS
⊕	OVRADJ
⊕	PARCEL
⊕	REAL_OWNERSHIP
⊕ ▶	REALMAST
⊕	SALEHIST
⊕	VISITHST

Preview Report Columns and Data:

3. Then, click on the boxes to select the individual fields to be displayed on your report.

Preview Report Columns and Data:
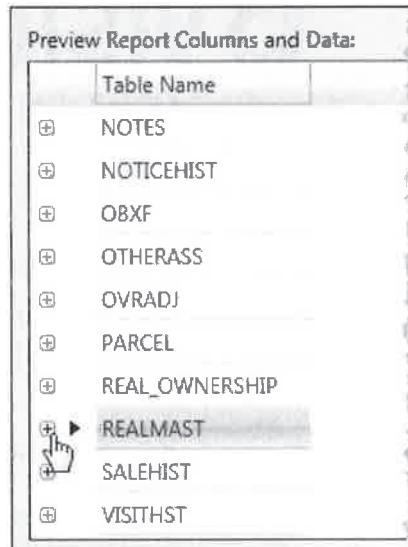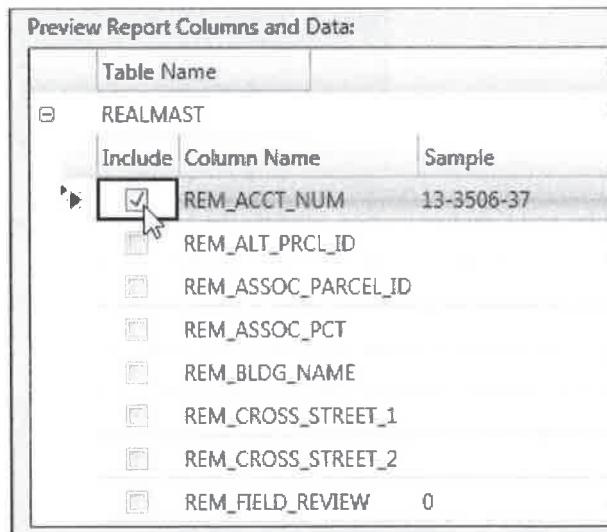
Table Name		
⊟ REALMAST		
Include	Column Name	Sample
☑	REM_ACCT_NUM	13-3506-37
☐	REM_ALT_PRCL_ID	
☐	REM_ASSOC_PARCEL_ID	
☐	REM_ASSOC_PCT	
☐	REM_BLDG_NAME	
☐	REM_CROSS_STREET_1	
☐	REM_CROSS_STREET_2	
☐	REM_FIELD_REVIEW	0

4. An option to select field alignment is also available by clicking the **Alignment** dropdown and selecting Left, Center or Right.

5. For any numeric fields, the user may choose a number format by clicking the **Format** dropdown. In the example below, we selected a currency format for the **Total Appraised Value** field.

6. As you select fields, a preview of your report will display on the bottom half of the screen under **Preview Report Output.**

7. Once you have all of your fields selected, you may change the order of the columns by single left-clicking on the column header and dragging the column to the desired area.

I. Step 1: Single left-click on the column to be moved.
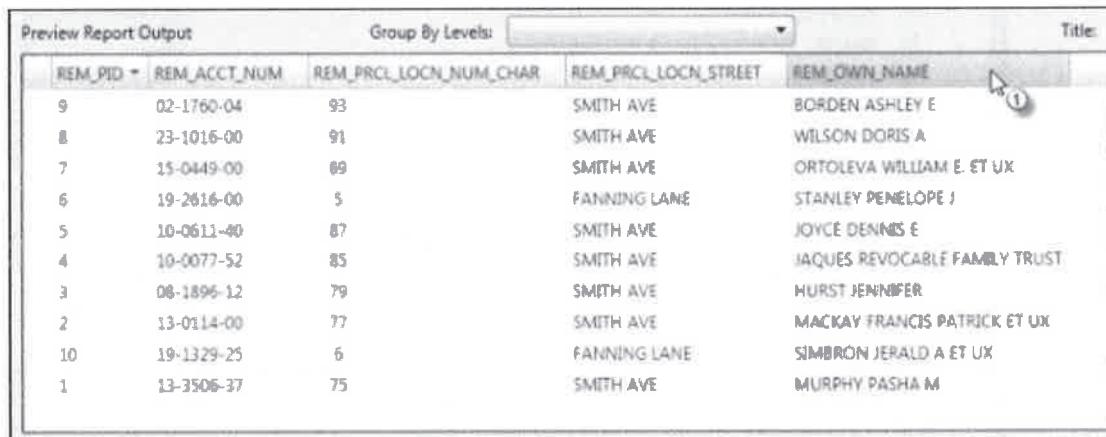
REM_PID ▾	REM_ACCT_NUM	REM_PRCL_LOCN_NUM_CHAR	REM_PRCL_LOCN_STREET	REM_OWN_NAME
9	02-1760-04	93	SMITH AVE	BORDEN ASHLEY E
8	23-1016-00	91	SMITH AVE	WILSON DORIS A
7	15-0449-00	89	SMITH AVE	ORTOLEVA WILLIAM E. ET UX
6	19-2616-00	5	FANNING LANE	STANLEY PENELOPE J
5	10-0611-40	87	SMITH AVE	JOYCE DENNIS E
4	10-0077-52	85	SMITH AVE	JAQUES REVOCABLE FAMILY TRUST
3	08-1896-12	79	SMITH AVE	HURST JENNIFER
2	13-0114-00	77	SMITH AVE	MACKAY FRANCIS PATRICK ET UX
10	19-1329-25	6	FANNING LANE	SIMBRON JERALD A ET UX
1	13-3506-37	75	SMITH AVE	MURPHY PASHA M

Preview Report Output — Group By Levels: — Title:

II. Step 2: Drag the column to the desired position

REM_PID ▾	REM_ACCT_NUM	REM_PRCL_LOCN_NUM_CHAR	REM_PRCL_LOCN_STREET	REM_OWN_NAME
9	02-1760-04		SMITH AVE	BORDEN ASHLEY E
8	23-1016-00	91	SMITH AVE	WILSON DORIS A
7	15-0449-00	89	SMITH AVE	ORTOLEVA WILLIAM E. ET UX
6	19-2616-00	5	FANNING LANE	STANLEY PENELOPE J
5	10-0611-40	87	SMITH AVE	JOYCE DENNIS E
4	10-0077-52	85	SMITH AVE	JAQUES REVOCABLE FAMILY TRUST
3	08-1896-12	79	SMITH AVE	HURST JENNIFER
2	13-0114-00	77	SMITH AVE	MACKAY FRANCIS PATRICK ET UX
10	19-1329-25	6	FANNING LANE	SIMBRON JERALD A ET UX
1	13-3506-37	75	SMITH AVE	MURPHY PASHA M

Preview Report Output — REM_OWN_NAME — Group By Levels: — Title:

III. Step 3: Release the mouse button. The column will now appear in a different area of the screen.

REM_PID ▼	REM_ACCT_NUM	REM_OWN_NAME ③	REM_PRCL_LOCN_NUM_CHAR	REM_PRCL_LOCN_STREET
9	02-1760-04	BORDEN ASHLEY E	93	SMITH AVE
8	23-1016-00	WILSON DORIS A	91	SMITH AVE
7	15-0449-00	ORTOLEVA WILLIAM E. ET UX	89	SMITH AVE
6	19-2616-00	STANLEY PENELOPE J	5	FANNING LANE
5	10-0611-40	JOYCE DENNIS E	87	SMITH AVE
4	10-0077-52	JAQUES REVOCABLE FAMILY TRUST	85	SMITH AVE
3	08-1896-12	HURST JENNIFER	79	SMITH AVE
2	13-0114-00	MACKAY FRANCIS PATRICK ET UX	77	SMITH AVE
10	19-1329-25	SIMBRON JERALD A ET UX	6	FANNING LANE
1	13-3506-37	MURPHY PASHA M	75	SMITH AVE

8. Once all of your fields are added and in the desired order on your report, add a **Title** to your report and click **Next** to view your completed report.

REM_PID ▼	REM_ACCT_NUM	REM_PRCL_LOCN	PRC_TTL_ASSESS
9	02-1760-04	93 SMITH AVE	$345,700
8	23-1016-00	91 SMITH AVE	$340,800
7	15-0449-00	89 SMITH AVE	$240,300
6	19-2616-00	5 FANNING LANE	$275,700
5	10-0611-40	87 SMITH AVE	$455,800
4	10-0077-52	85 SMITH AVE	$167,400
3	08-1896-12	79 SMITH AVE	$223,800
2	13-0114-00	77 SMITH AVE	$308,600
10	19-1329-25	6 FANNING LANE	$181,400
1	13-3506-37	75 SMITH AVE	$225,000

9. Your Report will appear on the screen.

	1	of 27		100%			Find	Next		

ASSESSED VALUES

REM_PID	REM_ACCT_NUM	REM_PRCL_LOCN	PRC_TTL_ASSESS
2	00000401	117 SEA AVENUE	$22
3	00000501	113 SEA AVENUE	$311,400
4	00000601	109 SEA AVENUE	$0
5	00000701	105 SEA AVENUE	$0
6	00000801	99 SEA AVENUE	$2
7	00000901	93 SEA AVENUE	$0
8	00001001	89 SEA AVENUE	$334,300
9	00001101	143 SEA AVENUE	$261,100
10	00001201	137 SEA AVENUE	-$1
11	00001301	131 SEA AVENUE	$317,900
12	00001401	125 SEA AVENUE	$323,100
13	00001501	122 SEA AVENUE	$261,800
14	00001601	71 MEARS AVENUE	$194,200
15	00001701	79 MEARS AVENUE	$176,000
16	00001801	85 MEARS AVENUE	$178,000
17	00001901	118 SEA AVENUE	$248,800
18	00002001	112 SEA AVENUE	$262,800
19	00002101	108 SEA AVENUE	$257,000

10. In the lower right-hand section of the page, click **NEXT** again.

A	126900
A	126900
V	
V	

Ne→ Next > Save

11. Place a check in the box titled **Save Local Report**

Report Wizard

Report Name

ASSESSED VALUES

☑ Save Local Report
☐ Save PIDs for GIS

Show SQL

12. Click **Save** in the lower right hand corner.
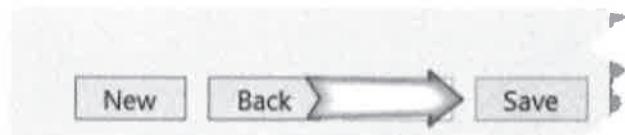
13. Navigate to where the RDL (template) should be saved for future access, make sure the file has a recognizable title, and click **Save**.
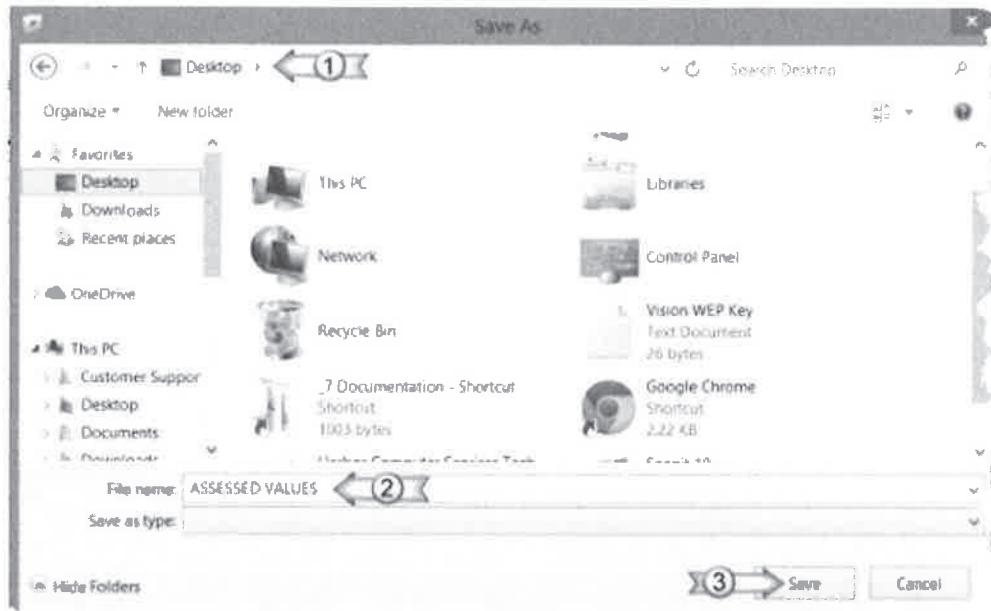
14. Navigate to where the file was saved. This RDL may now be shared with other users who may need that report.

Importing an RDL File

To access an RDL for use, it must be imported to Vision.

1. Go to the main **Report Wizard** screen and click the Import button in the upper right-hand section of the screen.
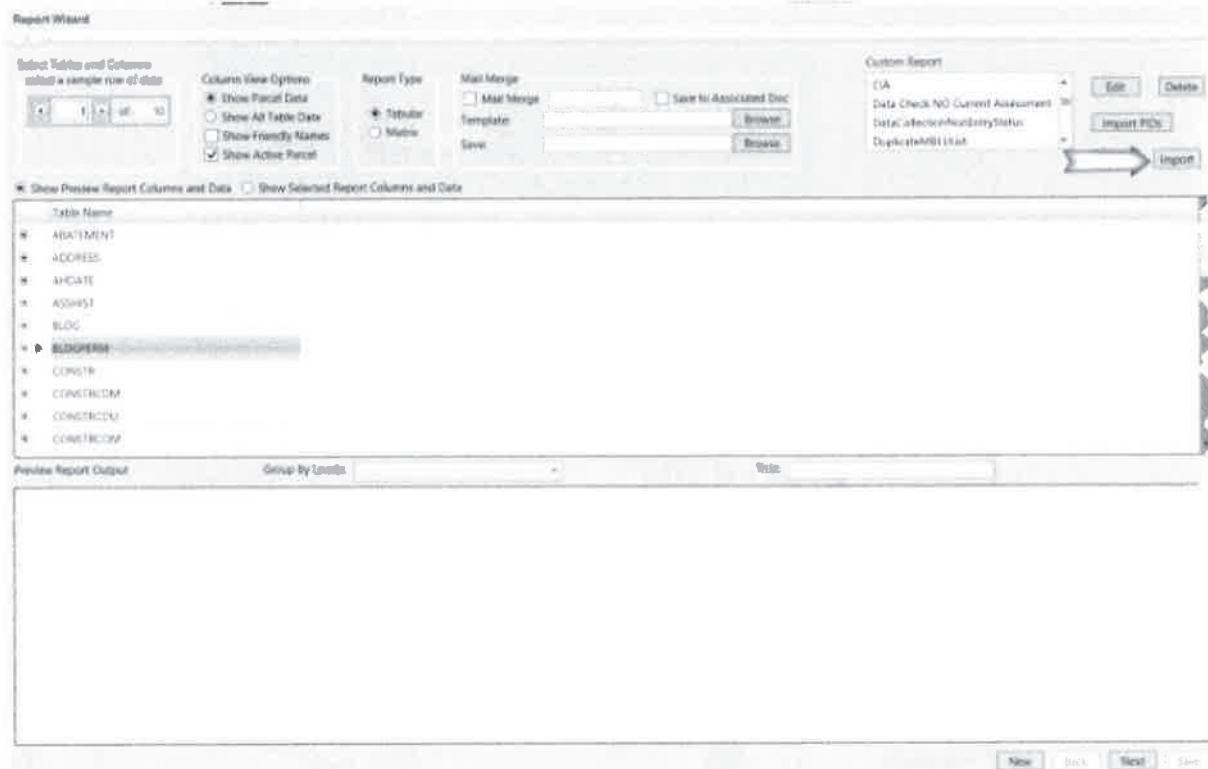
2. A navigation box will open. It will display the type of file being sought in the lower right-hand section of the field (rdl files *.rdl).
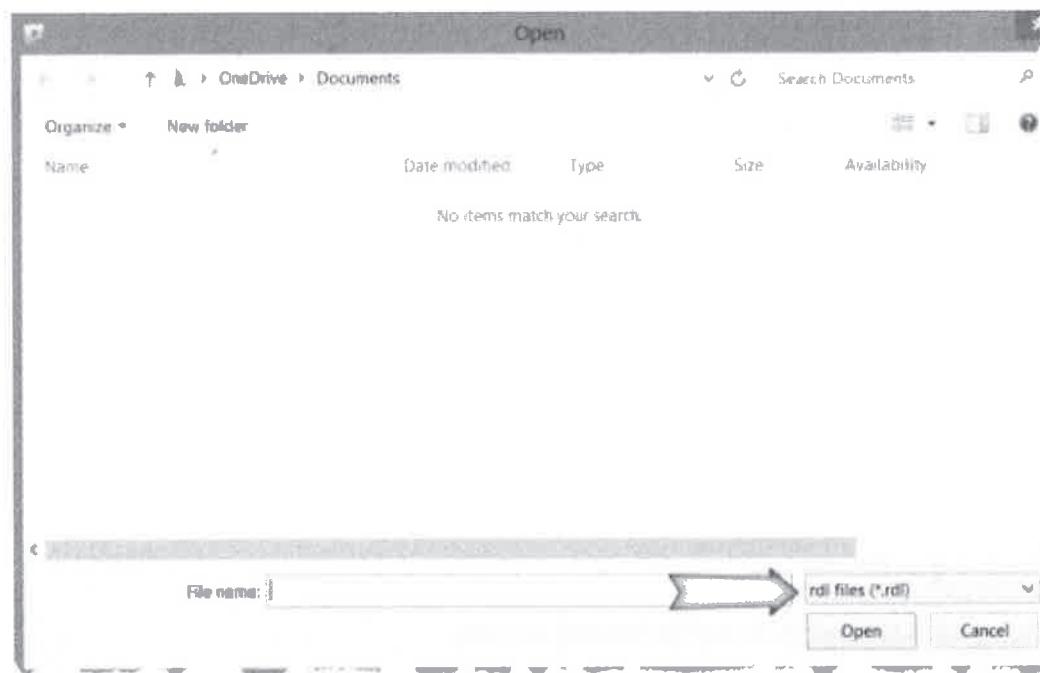
3. Navigate to where the RDL file is located and click Open.

4. The imported file should now be available for use.

5. Go to the **Custom Report** box in the upper right-hand section of the **Report Wizard** and scroll through the list provided to find the newly imported file. Click on **Edit** to open the report.
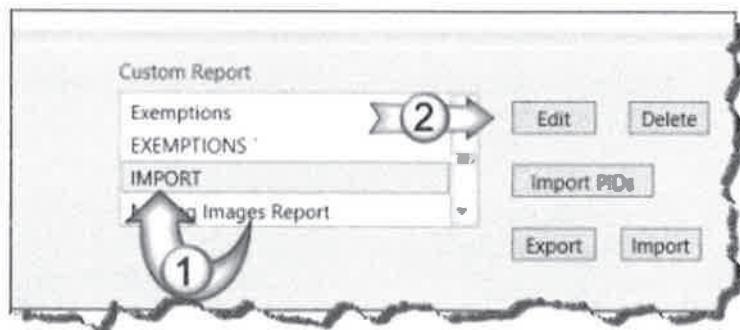
6. The file will open and display the **Selected Report Columns and Data** as well as a sample of the data the report will produce.

Exporting an RDL File

Exporting an RDL file is the same as saving a file, however, the steps are a little different.

1. Follow steps 1 through 9 to create a report in **Report Wizard**.

2. Once the report is displaying as expected, go to the upper right-hand section of the **Report Wizard** screen and click on **EXPORT.**
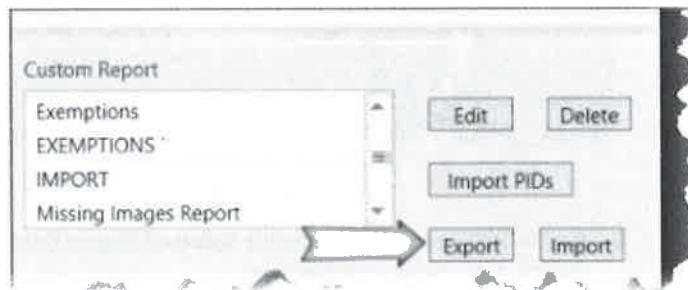
3. Navigate to where the RDL (template) should be saved for future access, make sure the file has a recognizable title, and click **Save**.

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4. Navigate to where the file was saved. This RDL may now be shared with other users who may need that report.

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Using the Mail Merge Wizard

The purpose of this document is to assist the user in generating a merge document in Microsoft Word and Mail Merge Report in the Vision 8 application.

This document is written assuming a basic knowledge of Vision Report Wizard and Microsoft Word; it is not intended to teach the basics of either.

To work with the Mail Merge option in Vision, a user must have a valid MS Word template available as well as a report that identifies the fields to be merged into the resulting document. Any fields that appear in the report that are not in the letter will be ignored.

Section I: Create Word Document Template

1. Open the Word document that you want to merge with Vision. In this example, the document is a letter that needs to be mailed to taxpayers.
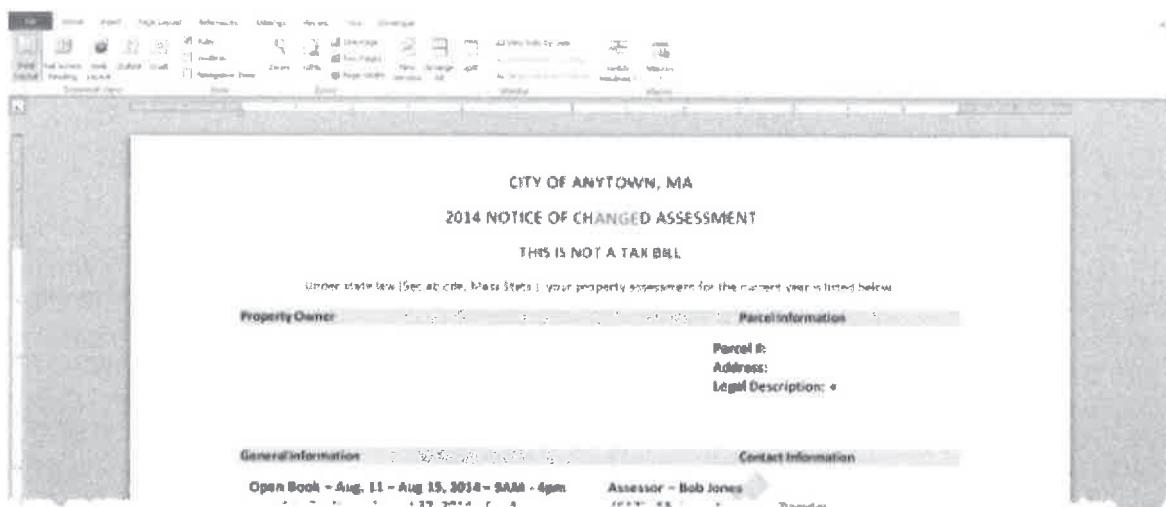
2. Place your cursor where you want to insert the first merge field. In this instance, we are adding the Property Owner information. From the **Insert** ribbon on the Word toolbar, click the **Quick Parts** drop arrow, and highlight **Field.**

CITY OF ANYTOWN, MA

2014 NOTICE OF CHANGED ASSESSMENT

THIS IS NOT A TAX BILL

Under state law (Sec. ab c de, Mass Stats) your property assessment for the current year is listed below.

Property Owner	Parcel Information
	Parcel #:
	Address:
	Legal Description: «
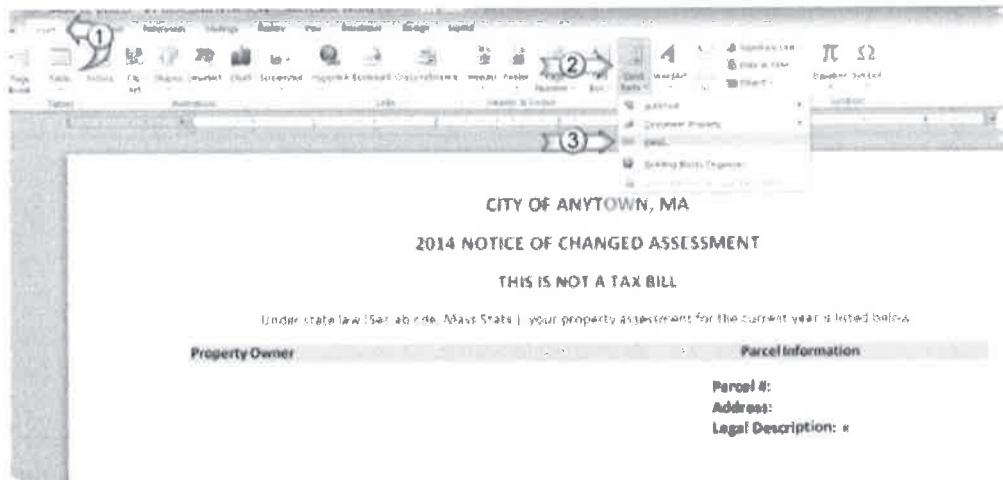
3. Select **Merge Field** and enter the **Field Name** EXACTLY as is it listed in Vision, from the **Report Wizard** select **Tables and Columns** list, then click **OK**.
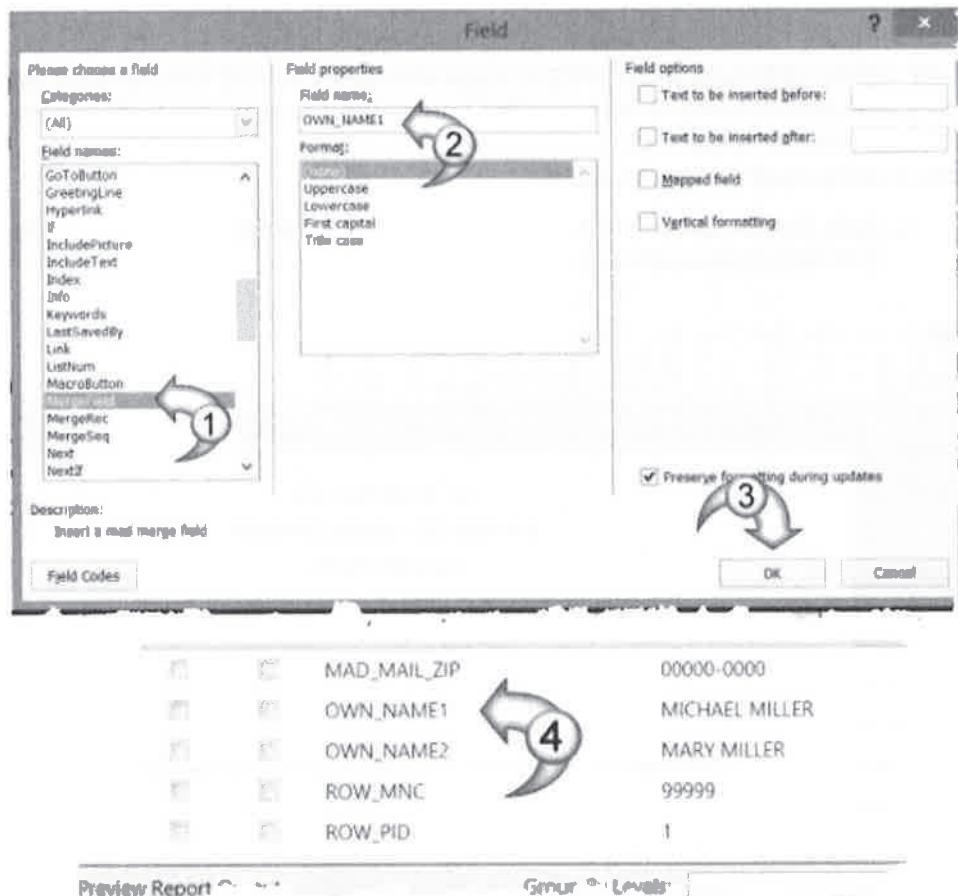
The newly chosen field will be added to the Word document.

2014 NOTICE OF CHANGED ASSESSMENT

THIS IS NOT A TAX BILL

Under state law (Sec ab cde, Mass Stats), your property assessment for the current year is listed below.

Property Owner	Parcel Information
«OWN_NAME1»	Parcel #: Address: Legal Description: «
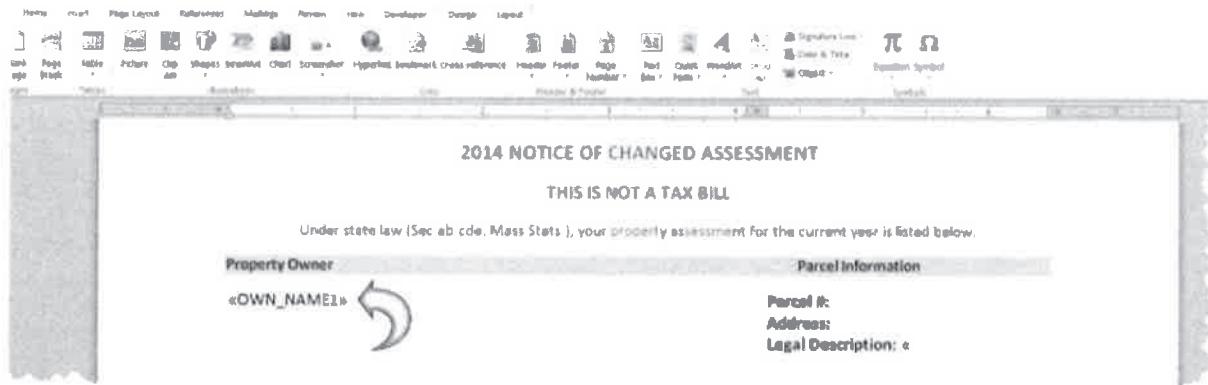
Continue this process until all fields have been added to your Word document.

CITY OF ANYTOWN, MA

2014 NOTICE OF CHANGED ASSESSMENT

THIS IS NOT A TAX BILL

Under state law (Sec ab cde, Mass Stats), your property assessment for the current year is listed below

Property Owner	Parcel Information
«OWN_NAME1» «OWN_NAME2» «MAD_MAIL_ADDR1» «MAD_MAIL_ADDR2» «MAD_MAIL_CITY», «MAD_MAIL_STATE» «MAD_MAIL_ZIP»	Parcel #: «REM_ACCT_NUM» Legal Description: «PRC_DESCRIPTION»

General Information	Contact Information
Open Book – Aug. 11 – Aug 15, 2014 – 9AM - 4pm Board of Review – August 27, 2014 – 9AM Meeting Location – Common Council Chambers	Assessor – Bob Jones (617) 555-1212, tassessor@anytown.net Municipal Clerk – Fred Smith (617) 555-1313, tclerk@anytown.net

Assessment Change

	General Property		PRC/MFL
YEAR	TOTAL VALUE		
2014	$«PRC_TTL_ASSESS»		
2013	$ «AHO_TTL_ASSESS»		
Total Assessment Change	$ «PRC_TTL_ASSESS - AHO_TTL_ASSESS»		
Reason for Change(s)			

Note: If a Agricultural La   version hange Form PP   B is enclos   view work pr   charge under state law (se 74 ***

4. When all the necessary fields are entered, go to **File** and choose **Save As**.

5. Choose the location where you want to save this file and click **Save**. Change the **Save as type** to Word Document Template (**.dot, or .dotx depending on the version of MS Word**).
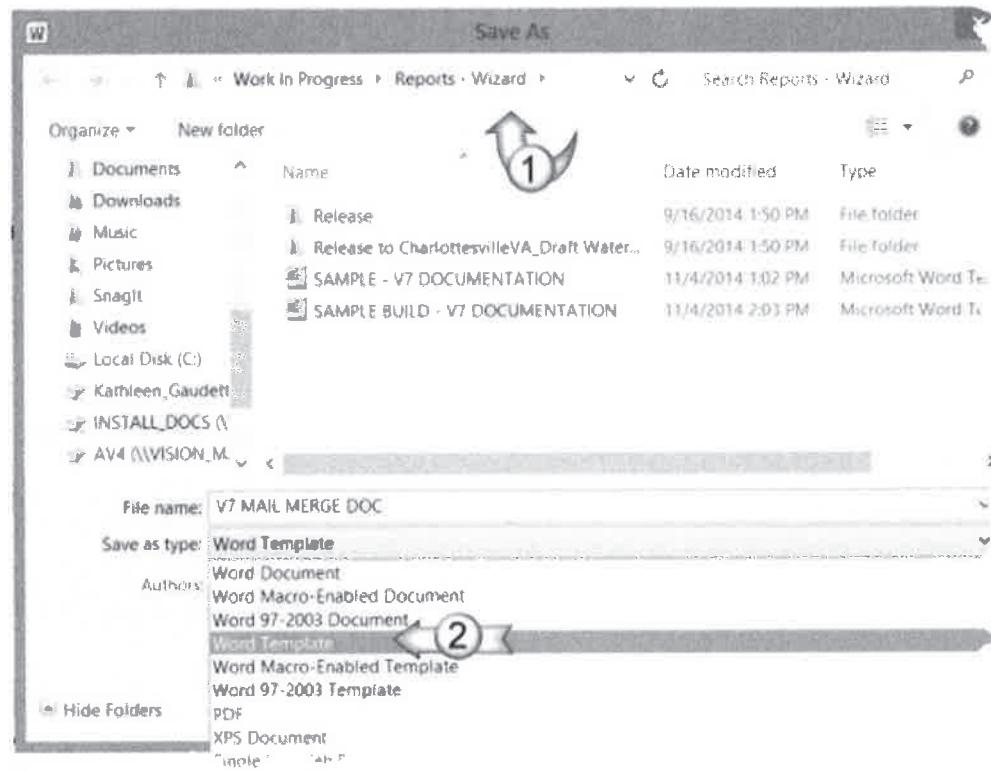
Section II: Create Report in Report Wizard

1. Navigate to the left-hand menu tree, and click on **Reports**
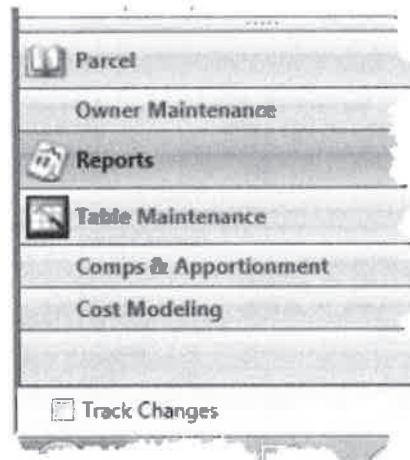
2. Create a new report and add the necessary tables needed to extract data for the letter.

3. When all of the proper fields are added to the report, click **Next** under the preview pane, to verify that the report will run and produce the desired results.

4. Click the **Back** button to return to the **Report Wizard** main page.
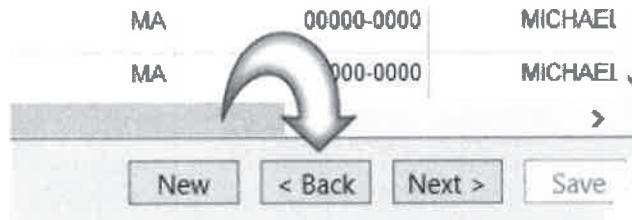
5. Go to the **Mail Merge** section of the **Select Tables and Columns** area at the top of the **Report Wizard** main page.
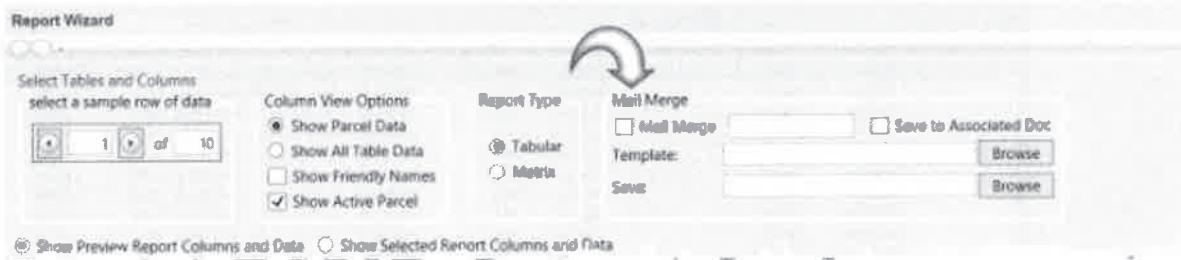
You will find a few options:

- **Mail Merge check box - Indicates** a mail merge is being created with the Report Wizard.

- **Save to Associated Doc - Indicates** an individual copy of the merged document will be attached to each parcel affected as an **Associated Document**.

- **Template** - Shows the path to the template being used for the merge resides.

- **Save -** Indicates where the final, merged document file will be saved, for review, printing, etc

6. Place a check in the **Mail Merge** box, and click **Browse** to go to where the Mail Merge Template has been saved.

7. Navigate to where the Mail Merge Template resides. Highlight the Word Template (identified as a .dot or .dotx file), and click **Open**.

You will be returned to the main **Report Wizard** page, where the path to the merge template has been entered
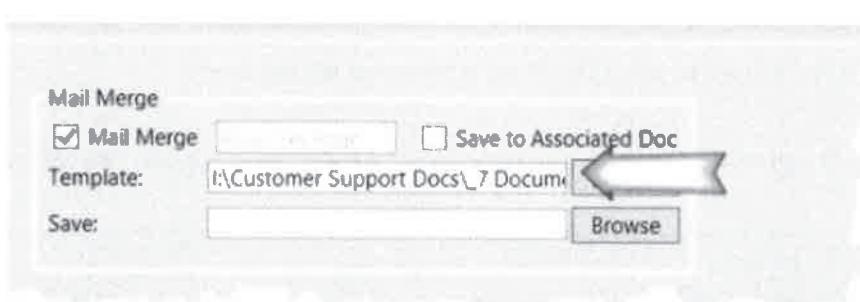
8. At the **Save** line, click **Browse** to navigate to where you are going to save the merged documents.
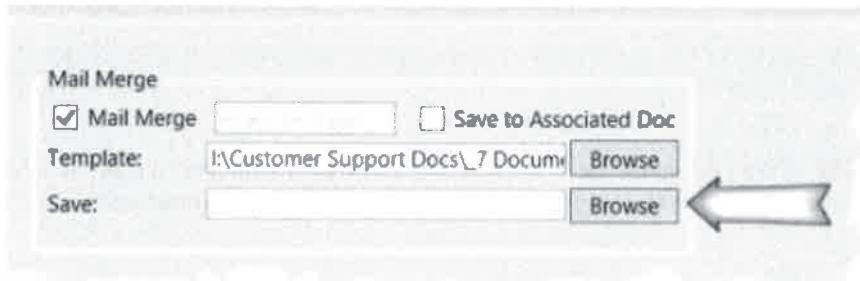
9. Go to where the merged documents will be saved, and add a File Name (**NOTE**: the documents will automatically be saved as either a .doc or .docx file because the template used is an MS Word Template). Click **Save**.
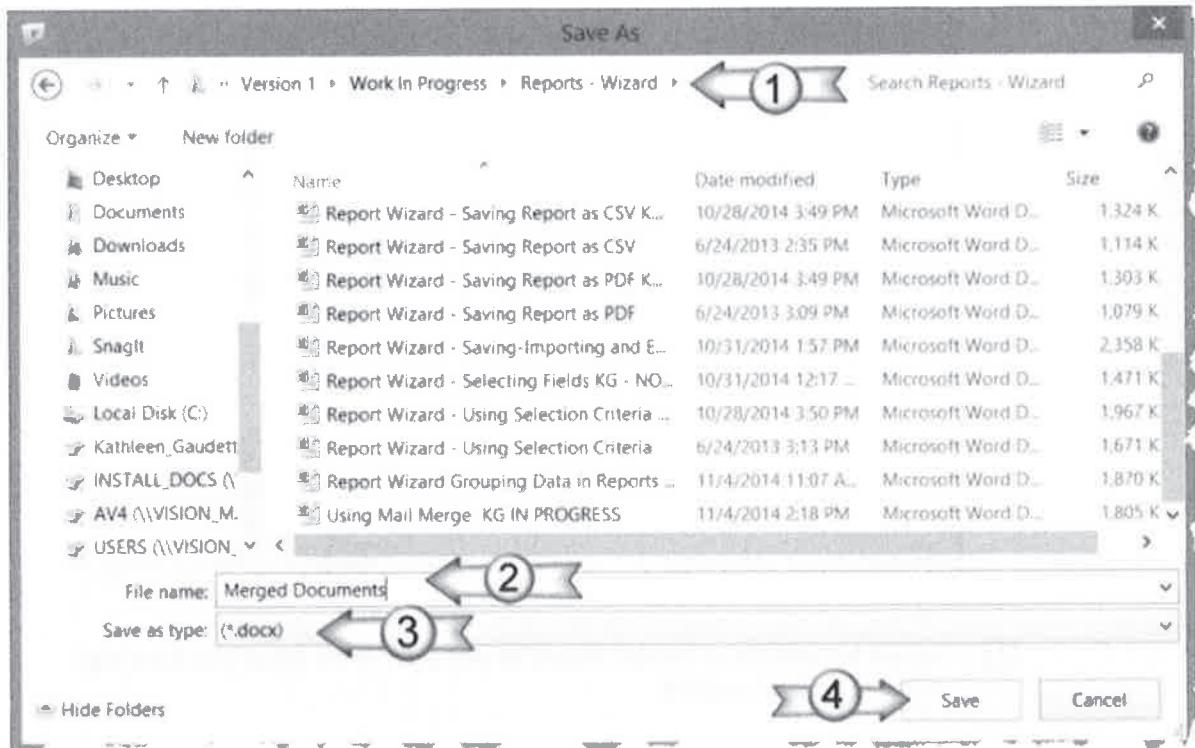
> You will be taken back to the main **Report Wizard** screen.

10. Click next in the lower right-hand corner of the page to start the Mail Merge process.

> The Mail Merge will now begin. As the process is running, the screen may flash several times. The **Next** button will remain inactive, and **highlighted** in **blue**.

Once the merge has completed, the **Next** button will become available, as indicated by the button no longer being highlighted in blue.

11. Click **Next** to proceed to the end page of the **Report Wizard**.
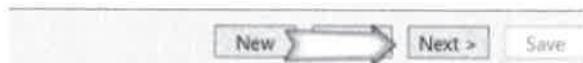
12. The wizard will show the end page.
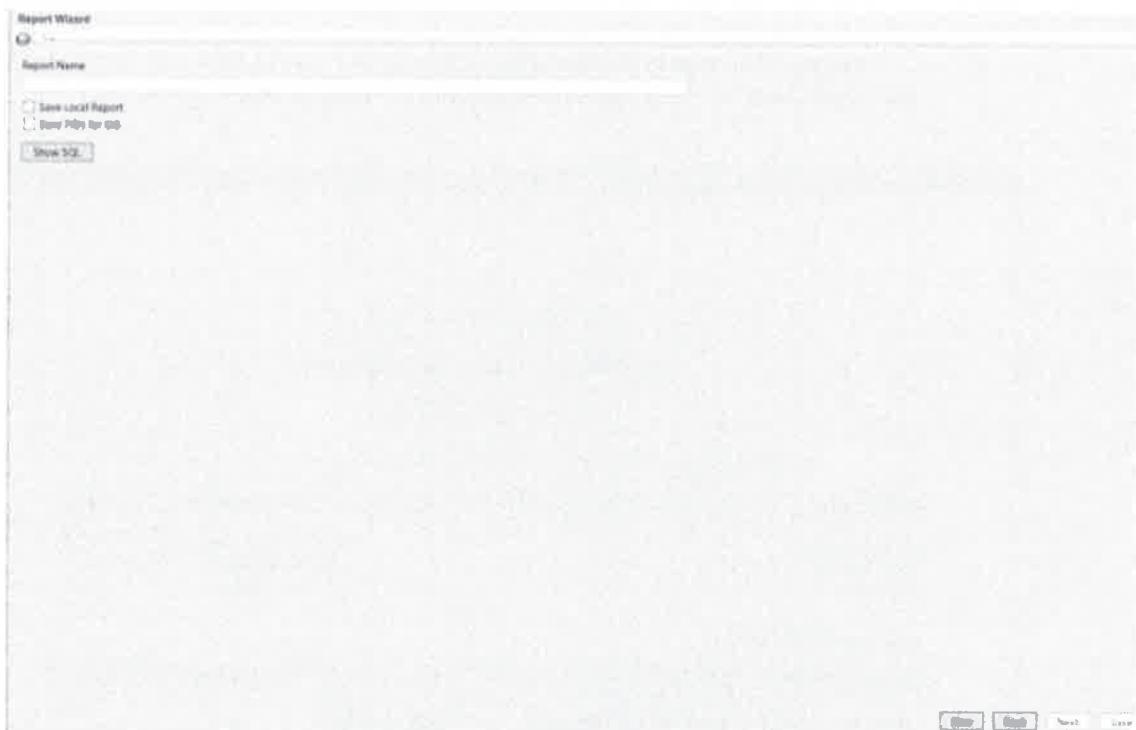
13. Navigate to where the merged document was saved in Step 14. There will now be a file folder, a Word document, and an HTML file, all carrying the name given to the **Save** file in Step 14.
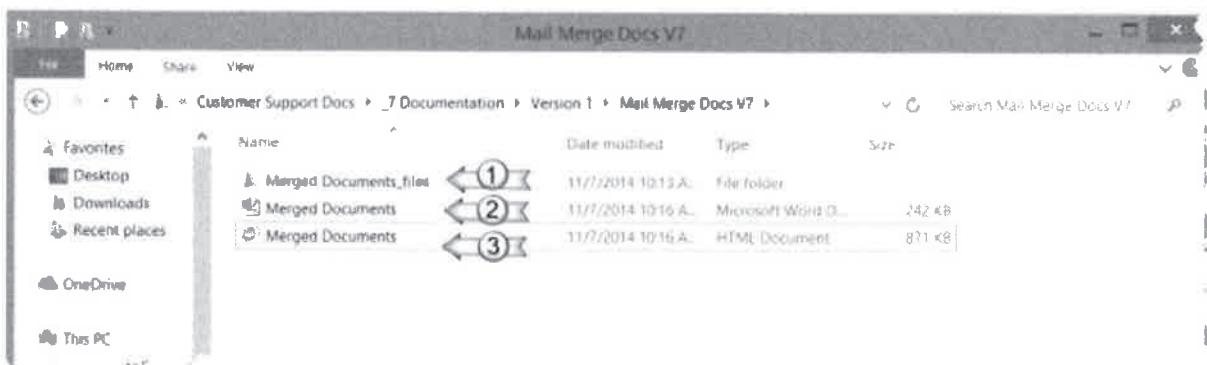
The **Merged Documents_files** folder contains information about the newly created document.
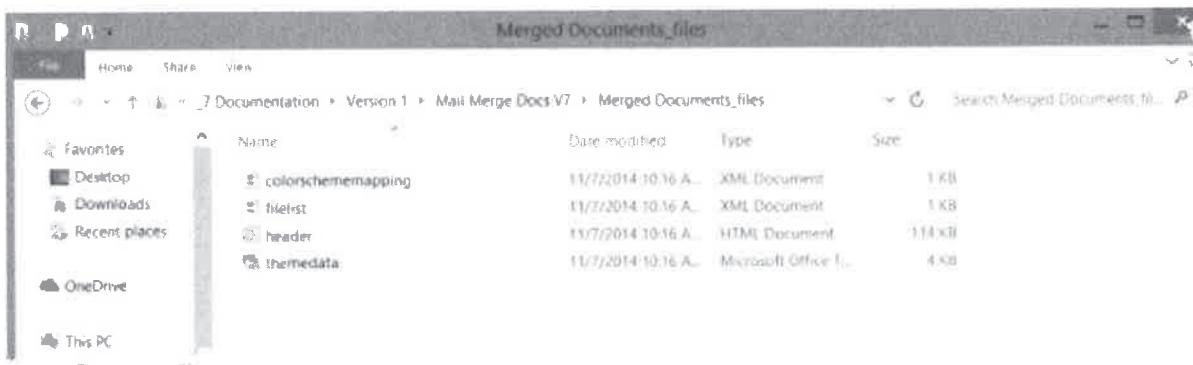
The **Merged Documents Word document** will contain a copy of **each** letter generated in the merge process. These documents will print as individual pages for mailing.

CITY OF ANYTOWN, MA

2014 NOTICE OF CHANGED ASSESSMENT

THIS IS NOT A TAX BILL

Under state law /Sec.a6.g0e. Mass Stats.) your property assessment for the current year is listed below

Property Owner   **Parcel Information**

MICHAEL MILLER   Parcel #: 100203032
MARY MILLER   Legal Description:
32 Main St   V7 Documentation

Anytown, MA 00000-0000

General Information   **Contact Information**

Open Book – Aug. 11 – Aug 15, 2014 – 9AM - 4pm   Assessor – Bob Jones
Board of Review – August 27, 2014 – 9AM   (617) 555-1212, taxsessor@anytown.net
Meeting Location – Common Council Chambers   Municipal Clerk – Fred Smith

CITY OF ANYTOWN, MA

2014 NOTICE OF CHANGED ASSESSMENT

THIS IS NOT A TAX BILL

Under state law (SEC ab coe, Mass Stats.), your property assessment for the current year is listed below

Property Owner	Parcel Information
MICHAEL MILLER	Parcel #: 100203033
MARY MILLER	Legal Description:
33 Main St	V7 Documentation

Anytown, MA 00000-0000

General Information	Contact Information
Open Book – Aug. 11 – Aug 15, 2014 – 9AM - 4pm	Assessor – Bob Jones

Property Owner	Parcel Information
MICHAEL MILLER	Parcel #: 100203034
MARY MILLER	Legal Description:
34 Main St	V7 Documentation

Anytown, MA 00000-0000

General Information	Contact Information
Open Book – Aug. 11 – Aug 15, 2014 – 9AM - 4pm	Assessor – Bob Jones
Board of Review – August 27, 2014 – 9AM	(617) 555-1212, tassessor@anytown.net
Meeting Location – Common Council Chambers	Municipal Clerk – Fred Smith

The **HTML** file contains a web-based representation of all of the documents created and can be used to review the pages prior to printing and mailing to Taxpayers.

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Merged documents can also be added to the **Associated Documents** section of a parcel by indicating that the doc should be **Saved to Associated Doc in Step 11**.
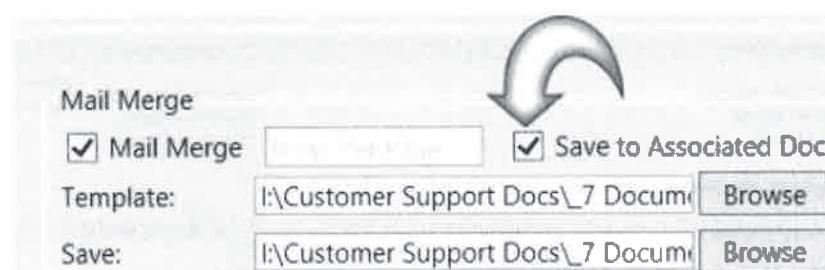
The program will prompt you asking how you would like to store this file. If you choose database this file will be added to the Vision Database. If you choose File Share the document will be saved to the Vision Documents Shared Network folder .

The process will create **individual** files in this case, as it will associate each doc to the specific parcel selected to receive the mailing.
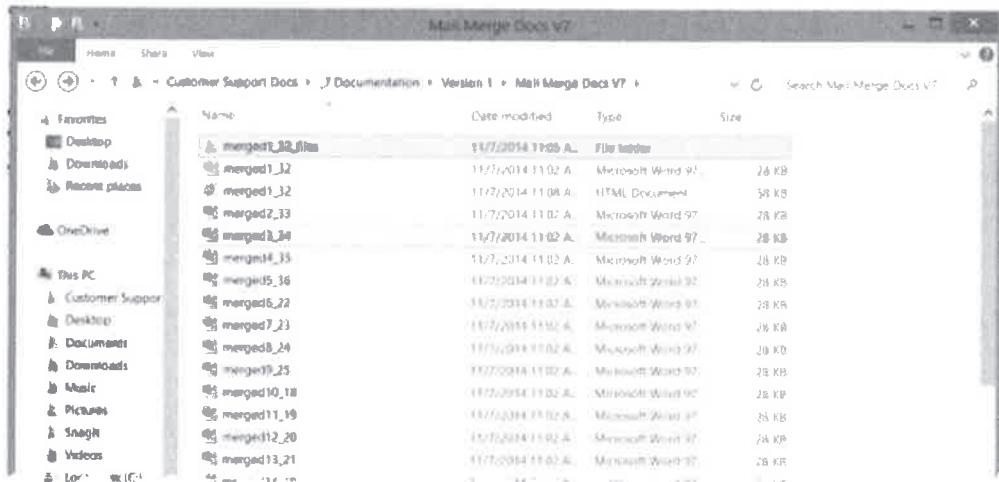
To verify that the document was attached, navigate to a selected parcel, click on the **Associated Documents link** from the **Associated Documents** sub menu, located in the tree on the left side of the screen.
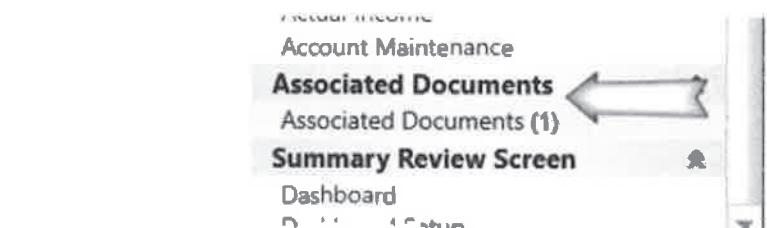
The newly added file will appear in the grid.

You can enter a **description** for the document if desired. To add a **description**, click on the document line you with to modify and then type your description in the field below.

○ VISION
GOVERNMENT SOLUTIONS

Cost Modeling Basics

This document outlines the foundational elements of Vision Cost Models.

Disclaimer

⚠ Please note that any alterations to the Cost Model will impact parcel valuation. There is no undo button to roll back changes once applied. Please verify that a valid database backup is in place prior to altering cost models. Additionally, you may wish to print a cost model report for reference before making changes. To do so, navigate to CAMA > Reports > Rate Files > Building and Land Rates, select Cost Model Report, then click View Report.

Before We Begin

This documentation follows a residential building with style code SMP: Sample Style having a base rate of 100 with no size adjustment. Below is an excerpt from the sample parcel Cost.dat. The Cost.dat is accessed by selecting Utilities > Recalc Parcels > Recalc Reports > Cost Report, or by selecting the Cost Report icon ▲ from the top of the screen.

```
Use Code = 2009
Cost Rate Group = SEN
Model ID = R01

Section #1
Section Use: SFD : Subsection = Res
Base Rate: 100.00
Size Adjustment: 1
Effective Area: 1200
Adjusted Base Rate = (100.00 + 0.000000) * 1
Adjusted Base Rate: 100.00
```

The RCN Equation

The Cost Models provide multiple elements included in the RCN equation. The various equation elements are outlined below. The elements provided by cost models are in **bold**.

RCN = ((Adjusted Base Rate * Effective Area + **Factored Unit Value Additions** + Factored Subareas)

    * Multipliers) + Non-Factored Unit Value Additions + Non-Factored Subareas

Adjusted Base Rate: Base Rate + **Cost Model Base Rate Additions**

Effective Area: Total Building/Section Effective Area as Calculated By the Sketch

Factored Unit Value Additions: Lump Sum Value Additions Factored by any Multipliers

Factored Subareas: Square Foot Price Valued Sketch Areas Factored by any Multipliers

Multipliers: RCN Multiplier

Non-Factored Unit Value Additions: Lump Sum Value Additions Not Factored by any Multipliers

Non-Factored Subareas: Square Foot Price Valued Sketch Areas Not Factored by any Multipliers

Cost Modeling

Access Cost Models by Navigating to CAMA > Cost Modeling > Cost Valuation Codes
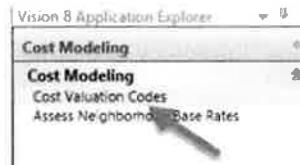
The Cost Valuation Models screen displays data in three individual panes.

Left Pane: List of Available Cost Model Groups. These are assigned in CAMA > Cost Modeling > Assessing Neighborhood Base Rates: Cost Model Column

Center Pane: List of Individual Cost Models Included in Cost Model Group Selected in Left Pane.

Right Pane: Coefficients Associated with Cost Model Selected in Center Pane

To create a new model, select [Define] in the top right hand corner of the screen.

To edit an existing model, select the model group from the left pane then the target model from the center pane. Once selected click [Edit] in the top right hand corner of the screen.

Coefficient edits are performed in the coefficient column of the Right Pane.

Model Development

This section outlines the various components of primary variable and dependent variable development. Values generated from primary variables apply directly to the building calculation. Dependent variables are linked to primary variables to further transform the primary variable. While handled differently in value calculations, configurations of primary and dependent variables are similar. Due to this, configurations of like primary and dependent variables are explained in tandem.

Numeric (Primary and Dependent)

Numeric models are intended for use with numeric construction detail fields to multiply the field value by the model coefficient. This is often used for elements such as fireplaces, bathrooms, and finished basement area.

Page 1 – Variable Definition

This screen is used to define the variable. In the Type dropdown, select Numeric for a primary variable, or Dependent Numeric for a dependent variable.

Page 2 – Field Assignment

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Expand the appropriate table then select the target database field for the model.

Page 3 – Coefficient Value

Enter the value to be multiplied by the field value.

Page 4 – Apply To

This screen is configured for Primary Variables only.

Standard for Numeric Models

Units (Factored): Applies coefficient to field units. Adjustment is applied prior to multipliers in RCN formula.

Flat Units (Non-Factored): Applies coefficient to field units. Adjustment is applied after multipliers in RCN formula.

Other Adjustment Applications may be used but are outside of the scope of basic cost model development.

Page 5 – Additional Operations

This screen allows for configuration of additional model criteria.

> User Defined Operations: This field combination allows for adjustment of the field value. Select the desired operation from the drop down, then enter the desired value in the Value field. Example – The user assumes the base rate includes one bathroom. The model should only apply value for bathroom count greater than 1. Operation = '+ Add'; Value = '-1'. This will add -1 bathrooms to the total field value.

> Enter Minimum / Maximum Range: Enter the minimum and maximum model values. Example – The user only wants the model to apply positive adjustments for up to 3 full bathrooms. Min Value = '0'; Max Value = '3'.

> Else Value: For numeric variables this is not applicable and is set to 0.

Page 6 – Has Dependent Variable
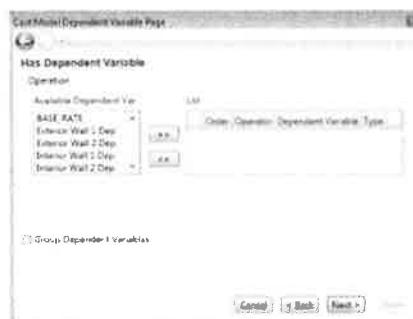
This screen is configured for Primary Variables only.

In some instances, primary models require additional custom operations. This screen facilitates linking one or more dependent models to primary models. This linking is covered later in this document.

Page 7 – New Variable Summary

This screen allows for model configuration review. Upon completion click Finish.

Binary (Primary and Dependent)

Binary models are used to transform alphanumeric data to numeric values. This type is often used for elements such as exterior wall, roof type, and grade.

Page 1 – Variable Definition

This screen is used to define the variable. In the Type dropdown, select Binary for a primary variable, or Dependent Binary for a dependent variable.

Page 2 – Field Assignment

Expand the appropriate table then select the target database field for the model.

Page 3 – Binary Codes or Breakpoints

This screen facilitates the inclusion of field value codes in the model.

To manually enter individual codes, type the desired code in the box next to 'Add New Codes' then click the 'Add New Codes' button.

To select all codes currently used in the field selected on page 2, click 'Database'.

To select all allowable codes from the associated field picklist, click 'Rate Table'.

To remove a code, select it from the list box and click 'Remove'

Page 4 — Apply To

This screen is configured for Primary Variables only.

Standard for Binary Models

+ Base Rate: Applies coefficient to the Base Rate value in the Adjusted Base Rate Calculation. *Note – if Apply as Percent is checked, this will apply the adjustment as a percentage of the base rate.

Multiplier: Applies a multiplier in the RCN equation. If multiple multiplier models exist, the results are multiplied together to arrive at the final RCN equation multiplier.

Units (Factored): Applies binary coefficient as a flat value. Adjustment is applied prior to multipliers in RCN formula.

Flat Units (Non-Factored): Applies binary coefficient as a flat value. Adjustment is applied after multipliers in RCN formula.

Eff Age: Applies an adjustment to the effective age calculation. *Note - These adjustments are applied to the RCNLD, not the RCN.

Depreciation: Alters the calculated depreciation after effective age calculation. *Note - These adjustments are applied to the RCNLD, not the RCN.

Page 5 — Additional Operations

This screen allows for configuration of additional model criteria.

User Defined Operations: This field combination allows for adjustment of the field value coefficient. Select the desired operation from the drop down, then enter the desired value in the Value field.

Enter Minimum / Maximum Range: Enter the minimum and maximum model values.

Else Value: Populate the default coefficient value for use in calculation if the field value does not exist in the variable list.

Page 6 — Has Dependent Variable

This screen is configured for Primary Variables only.

In some instances, primary models require additional custom operations. This screen facilitates linking one or more dependent models to primary models. This linking is covered later in this document.

Page 7 – New Variable Summary

This screen allows for model configuration review. Upon completion click Finish.

Coefficient Assignment

After finalizing the model, individual coefficients must be set on the Cost Valuation Models screen. Select the new model from the center pane, then assign required coefficients in the right pane. Once complete, click Apply in the lower right hand corner of the screen.

Breakpoint (Primary and Dependent)

Breakpoint variables integrate the functionality of Numeric and Binary variables. The modeled field value must be a numeric value, but the behavior is like that of a binary as it transforms a numeric range to a single variable coefficient as indicated through model configuration. This is often used to apply one adjustment for one value range, while applying alternate adjustments or no adjustment to other value ranges.

Page 1 – Variable Definition

This screen is used to define the variable. In the Type dropdown, select Breakpoint for a primary variable, or Dependent Breakpoint for a dependent variable.

Page 2 – Field Assignment

Expand the appropriate table then select the target database field for the model.

Page 3 – Binary Codes or Breakpoints
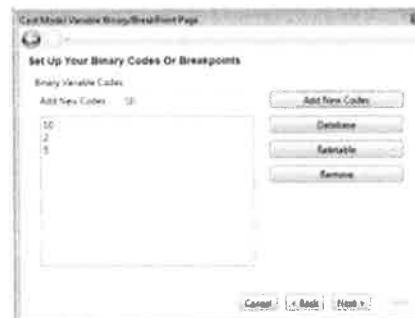
Use this screen to manually enter individual breakpoints. To do this, type the required breakpoints in the box next to 'Add New Codes' then click the 'Add New Codes' button. The model value is determined by selecting the first break point greater than or equal to the field value. For example, if the breakpoint values are 2 (coefficient of 0), 5 (coefficient of 500), and 10 (coefficient of 1000), and the subject value is 3, the variable value will be 500 because 5 is the first breakpoint greater than or equal to 3. If the subject value is 12, this value is greater than the maximum defined breakpoint therefore the variable value denoted in the Else field configured on Page 5.

Page 4 – Apply To

This screen is configured for Primary Variables only.

Standard for Breakpoint Models

+ Base Rate: Applies coefficient to the Base Rate value in the Adjusted Base Rate Calculation. *Note – if Apply as Percent is checked, this will apply the adjustment as a percentage of the base rate.

Multiplier: Applies a multiplier in the RCN equation. If multiple multiplier models exist, the results are multiplied together to arrive at the final RCN equation multiplier.

Units (Factored): Applies binary coefficient as a flat value. Adjustment is applied prior to multipliers in RCN formula.

Flat Units (Non-Factored): Applies binary coefficient as a flat value. Adjustment is applied after multipliers in RCN formula.

Eff Age: Applies an adjustment to the effective age calculation. *Note - These adjustments are applied to the RCNLD, not the RCN.

Depreciation: Alters the calculated depreciation after effective age calculation. *Note - These adjustments are applied to the RCNLD, not the RCN.

Page 5 – Additional Operations

This screen allows for configuration of additional model criteria.

User Defined Operations: This field combination allows for adjustment of the field value. Select the desired operation from the drop down, then enter the desired value in the Value field.

Enter Minimum / Maximum Range: Enter the minimum and maximum model values.

Else Value: Populate the default coefficient value for use in calculation if the field value exceeds the maximum configured value on Page 3.

Page 6 – Has Dependent Variable
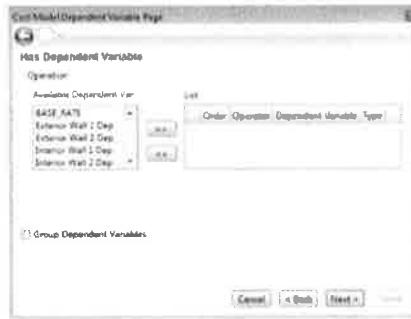
This screen is configured for Primary Variables only.

In some instances, primary models require additional custom operations. This screen facilitates linking one or more dependent models to primary models. This linking is covered in subsequent sections.

Page 7 – New Variable Summary
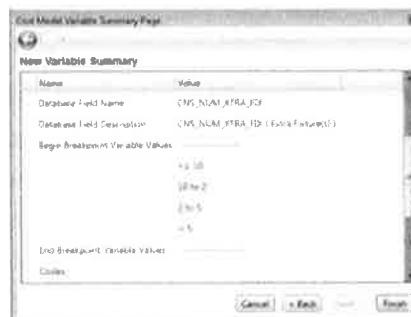
This screen allows for model configuration review. Upon completion click Finish.

Coefficient Assignment

After finalizing the model, individual coefficients must be set on the Cost Valuation Models screen. Select the new model from the center pane, then assign required coefficients in the right pane. Once complete, click Apply in the lower right hand corner of the screen.
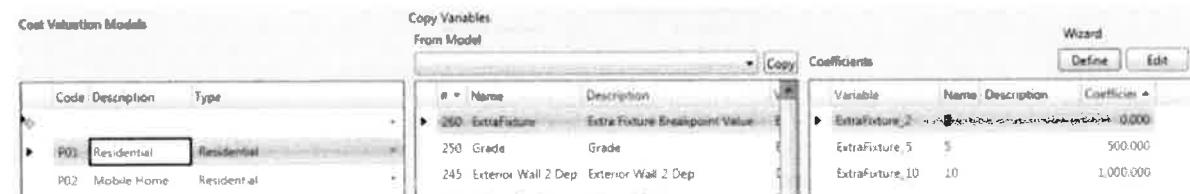
Constant (Primary and Dependent)

Constant models allow for direct injection of numeric data into the calculation. The coefficient is the constant value. Constant models are typically used as dependent variables.

Page 1 – Variable Definition
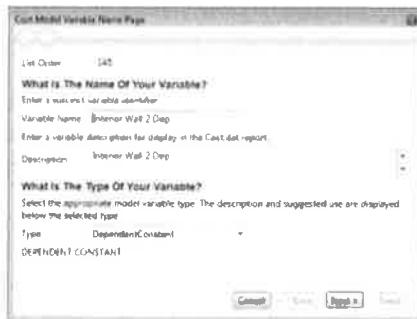
This screen is used to define the variable. In the Type dropdown, select Constant for a primary variable, or Dependent Constant for a dependent variable.

Page 2 – Coefficient Value

Enter the coefficient value.

Page 3 – New Variable Summary

This screen allows for model configuration review. Upon completion click Finish.

Dependent Models

Depending on calculation requirements, it may be necessary to link one or more dependent variables to a primary variable. The numeric output of primary variables is included in the cost calculation. The numeric output of dependent variables is considered in the primary variable calculation.

Dependent variables are linked to primary variables in the 'Has Dependent Variable' page. Here the user has the option to link one or more dependent variables to the primary variable. In some instances, the operations should be applied in sequential order where other cases may require the grouping of dependent variable calculations prior to application to the primary variable. For this flexibility, the software includes a 'Group Dependent Variable' option.

The following Primary / Dependent Model group is present for demonstration purposes. For ease of explanation, the Constant/Dependent Constant variable types are used.

GROUP_DEMO is the primary variable with a Coefficient of 1500

GROUP_DC1 is a dependent variable with a Coefficient of 750

GROUP_DC2 is a dependent variable with a Coefficient of 0.50

GROUP_DC3 is a dependent variable with a Coefficient of 300

270	GROUP_DEMO	Group Dependent Variable Demo	C
280	GROUP_DC1	Group Demo Dependent 1	DC
290	GROUP_DC2	Group Demo Dependent 2	DC
300	GROUP_DC3	Group Demo Dependent 3	DC

The dependent variables are linked to the primary variable as shown. For the first example, the Group Dependent Variable box is unchecked indicating sequential calculation.
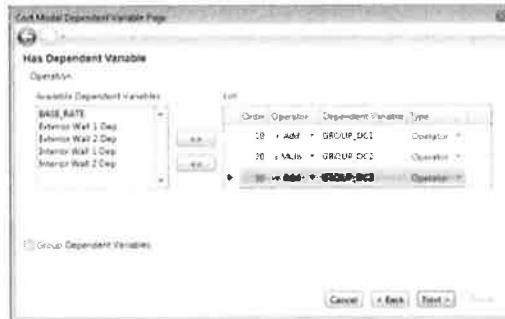
The calculation occurs as follows:

(((GROUP_DEMO + GROUP_DC1) * GROUP_DC2) + GROUP_DC_3)

(((1500 + 750) * 0.50) + 300) = 1425

As seen in the Cost.dat:

Group Dependent Variable Demo = 1425.00 + RCN

If the model is then updated by checking the 'Group Dependent Variables' box, the calculation is then processed as follows:
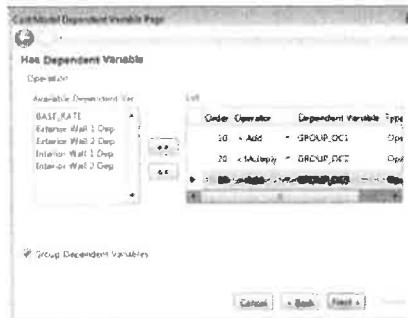
GROUP_DEMO + ((GROUP_DC1 * GROUP_DC2) + GROUP_DC_3)

1500 + ((750 * 0.50) + 300) = 2175

As seen in the Cost.dat:

Group Dependent Variable Demo = 2175.00 + RCN

Cost Modeling Tips and Tricks

The following address some common cost modeling questions.

Minimum/Maximum Values

If the calculated value is greater or less than expected, check the minimum / maximum values for the cost model.

Example: The cost model states that each fireplace should generate $5,000 in value. The subject parcel has 5 fireplaces. The expected value is $25,000. The Cost.dat shows a value of 15,000. This may be due to restrictions placed on the cost model in the Additional Operations screen. Note that this model has a Max Value of 3, indicating that if the data in the fireplace field is greater than 3 the model will use the value 3 in the calculation. To value all 5 fireplaces, update the Max Value field in the model and click apply.

Example: The cost model contains an additional operation to subtract one full bathroom from the total value in the full bathroom field. Due to this, buildings having 0 full bathrooms should have a negative value adjustment. Review of the cost report for a building with 0 full bathrooms does not show a full bathroom adjustment. This may be due to the Minimum Value set on the Additional Operations page. Because of the additional operation of 'Add -1', the field value is now -1 but the Minimum Value is 0. The Cost Model uses the minimum acceptable value of 0 for the calculation. To allow adjustment for zero bathrooms, update the Minimum Value to '-1'.

Enabling/Disabling Models

There are instances where a model is only relevant for a specific parcel type. An 'On/Off' switch may be developed using a dependent binary model with the filter field selected in the model. To enable a model for a specific code, set the respective coefficient to 1. To disable a model for a code, set the respective coefficient to 0. Then assign this dependent binary model to the primary variable with a 'Multiply' operator. This follows the principle that anything multiplied by 0 is 0, therefore effectively turning the model 'off'.

Else Values

A user may encounter an issue where a model is generating value for a building when not expected to do so. If this occurs, review the Else Value on the Additional Operations page. The value in this field is the default coefficient when the binary or breakpoint entry is outside of the bounds of the model variables.

Model Created / Not Generating Value

This issue may result from multiple issues. When testing models, be sure that the test parcel is in the same model as the newly developed cost model. Also, verify that the model was saved properly by clicking Apply after creation. If updating coefficients, be sure to click Apply or Save after update. If there is still an issue, be sure there is not a multiplier dependent variable calculating to 0 which may effectively shut the model 'off'.

Database Field Assignment

Each model developed is prone to user error. Example: A model was created to value fireplaces at $5000 each. The test building has 1 fireplace, but the Cost.dat shows $10,000 for the fireplace model. A review of construction details shows that the parcel has 2 chimneys. Review the Table/Field page in the cost model to validate proper database field linking. It is possible that upon creation of the model, it was accidentally assigned to the chimney field as opposed to the correct fireplace field. Note that in the Cost.dat, the report shows the model label created by the user, not the database field name or label.

Sample Cost.dat

Below is a sample Cost.dat with notes to locate the various report elements.

Cost.dat

OUTPUT FROM NEW COST MODELING ENGINE

REPORT GENERATED ON 10-Sep-2018 AT 15:11

**************Building #1 Calc Start****************

Cost Calculation for pid, bid = 7257, 7257

Account Number = SAMPLE *Parcel > Legal Information > Account Information*

Use Code = 200R *Table Maintenance > Cost Use Codes > Building Use*

Cost Rate Group = SIN *Table Maintenance > Cost Use Codes > Group*

Model ID: = P01 *Cost Modeling > Cost Valuation Codes > Code*

Section #1 *Parcel > Building Information > Construction Details: Section*

Section Use: SFD - Suburban – Res *Parcel > Classification & Land Information > Code (Line #1 for Building)*

Base Rate: 100.00 *Look at Parcel > Building Information > Construction Details > Style, then toggle to Table Maintenance > Cost Group Rates > Base Rate (Link on Cost Group Rate & Style)*

Size Adjustment: 1 *Based on Table Maintenance > Building Tables > Style Codes > Size Adj and Table Maintenance > Building Tables > Cost Use Codes > Size Adj. The Code then links to Table Maintenance > Building Tables > Size Adjustment Table > Code*

Effective Area: 1200 *Parcel > Building Information > Depreciation > Effective Area*

Adjusted Base Rate = (100.00 + 0.000000) * 1 *(Base Rate + Base Rate Additions) * Base Rate Adjustments]*

Adjusted Base Rate: 100.00

RCN = ((100.00 * 1200 + 10500.000 + 5440.000) * 1.20) + 10000.000 + 2560.000

((Adjusted Base Rate * Effective Area + Factored Unit Value Additions + Factored Subareas)
* Multipliers) + Non-Factored Unit Value Additions + Non-Factored Subareas

RCN: 175688

******************Units Value Additions***************** *(Factored Unit Value Additions)*

Full Bath(s) @ $5000 Each = 10000.000 + RCN *Cost Model*

Extra Fixture Breakpoint Value = 500 + RCN *Cost Model*

******************Factor Adjustments******************* *(Multipliers)*

Grade G = 1.20 x RCN *Cost Model*

******************Flat Value Additions***************** *(Non-Factored Unit Value Additions)*

Fireplace(s) = 10000 + RCN *Cost Model*

******************Factored Subareas**************** *(Factored Subareas)*

Subarea Total = 5440.000 *Table Maintenance > Building Tables > Subareas: Use Square Foot Price/Use Grade*

******************Non-Factored Subareas***************** *(Non-Factored Subareas)*

Subarea Total = 2560.000 *Table Maintenance > Building Tables > Subareas: Use Square Foot Price*

Actual Year Built: 2008 *Parcel > Building Information > Depreciation > Year Built*

Effective Age = 4 *Capture Parcel > Building Information > Depreciation > Year Built & CDU/Condition Table Maintenance > Building Tables > EYB Depreciation > Link AYB to Year Built & Code to CDU/Condition to determine Effective Age*

Percent Good = 96 *Parcel > Building Information > Depreciation > Building % Good*

RCNLD * Trending = 168660 * 1.000

RCNLD: 168700

⊘ VISION
GOVERNMENT SOLUTIONS

Comparable Sales Values

This document outlines the process to calculate Comparable Sales values in Vision.

Update Recalculation Settings

1. In the **ADMIN** application, select Table Maintenance > Building Tables > Recalculation Settings

2. Set the **Run Comps** flag to 'YES' for each Building Use where a calculated comparable sales value is required.

Bldg Use	Description	Run Cost	Run Regression	Run Income	Run Comps	Run Apportn	Run Override	Run Trend	Run MVP
210	Single Family	YES	YES	YES	YES	NO	YES	NO	NO
210C	SFR Condominium	YES	YES	YES	YES	YES	YES	NO	NO
215	SFR w Acc Apt	YES	YES	YES	YES	NO	YES	NO	NO
220	Two Family	YES	YES	YES	YES	NO	YES	NO	NO
230	Three Family	YES	YES	YES	YES	NO	YES	NO	NO

3. Once recalculation flags are set, click **Apply** in the lower right corner of the screen.

4. Return to the **CAMA** application for the remainder of the process.

Run Sale Trending

Comparable Sales valuation requires successful completion of the Sale Trending process. If the market indicates no trend adjustments are required, the process must be run with adjustment values of 0. This process populates the time adjusted sale price field which is required for comparable sales functionality.

Please reference *How to Use Sale Trending* for process details.

Extract Comps Snapshot from Master

Prior to extracting comparable sales, please verify and archive the latest database backup. The backup file is required to restore the database should an error occur in the extract process. This process does not have an 'Undo' function.

1. Select Utilities > Comp Snapshot Utilities > Extract Comps Snapshot from Master

2. Review the Vision Warning, then click OK to proceed.
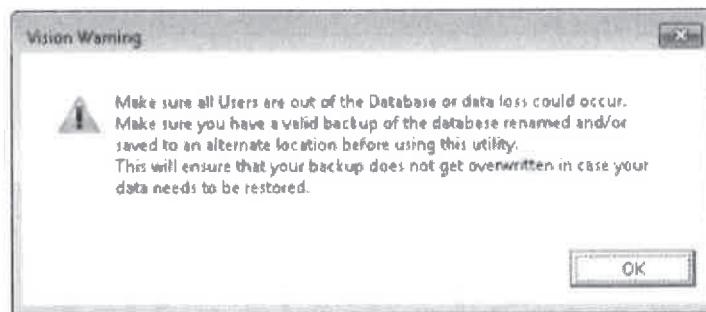
3. Indicate the required extract criteria.
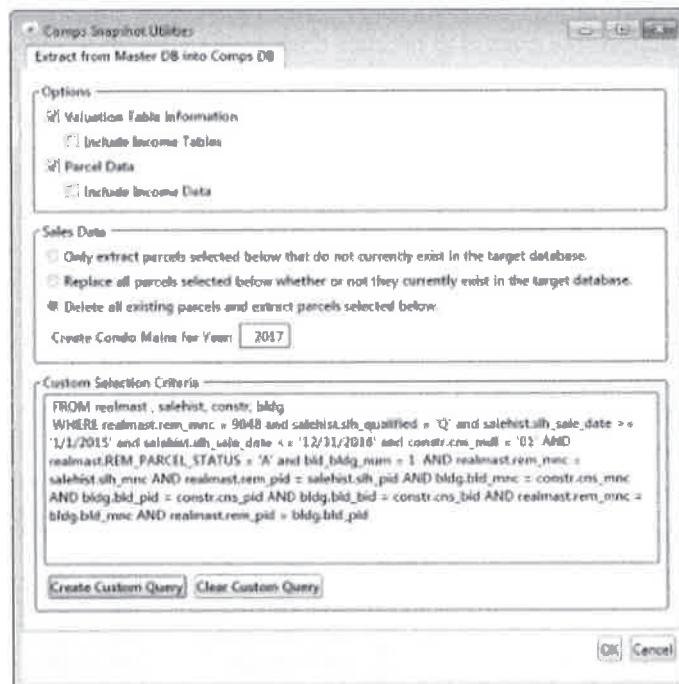
a. Options:

    i. **Valuation Table Information**: Copies current rate and configuration tables from the Master database to the Comp Sales database.

    ii. **Include Income Tables**: Copies current income related rate and configuration tables from the Master database to the Comp Sales database.

    iii. **Parcel Data**: Copies parcel characteristics from the Master database to the Comp Sales database.

    iv. **Include Income Data**: Copies income specific parcel characteristics from the Master database to the Comp Sales database.

b. Sales Data:

    i. **Only Extract Parcels Selected Below That Do Not Currently Exist in the Target Database**: Retains parcels present in the Comp Sales database, and adds additional parcels as indicated by the selection criteria. If a parcel scheduled for extract currently exists in the Comp Sales database, the routine will bypass that parcel.

ii. **Replace All Parcels Selected Below Whether or Not They Currently Exist in the Target Database**: Retains parcels present in the Comp Sales database, and adds additional parcels as indicated by the selection criteria. If a parcel scheduled for extract currently exists in the Comp Sales database, the routine will extract a current copy of that parcel. This may result in duplicate parcels in the Comp Sales database

iii. **Delete All Existing Parcels and Extract Parcels Selected Below**: Deletes all parcels that exist in the Comp Sales database and adds new parcels as indicated by the selection criteria

iv. **Create Condo Mains for Year**: Enter current year

c. Click [Create Custom Query]: Comparable sales are extracted based on user defined criteria

   i. **Range of Parcels Tab**: Set appropriate Sale Date Criteria and indicate any additional filter criteria

   ii. **Advanced Tab**: Uncheck 'Only Select Current Owner Sale'

   iii. Click Ok when extract criteria are complete
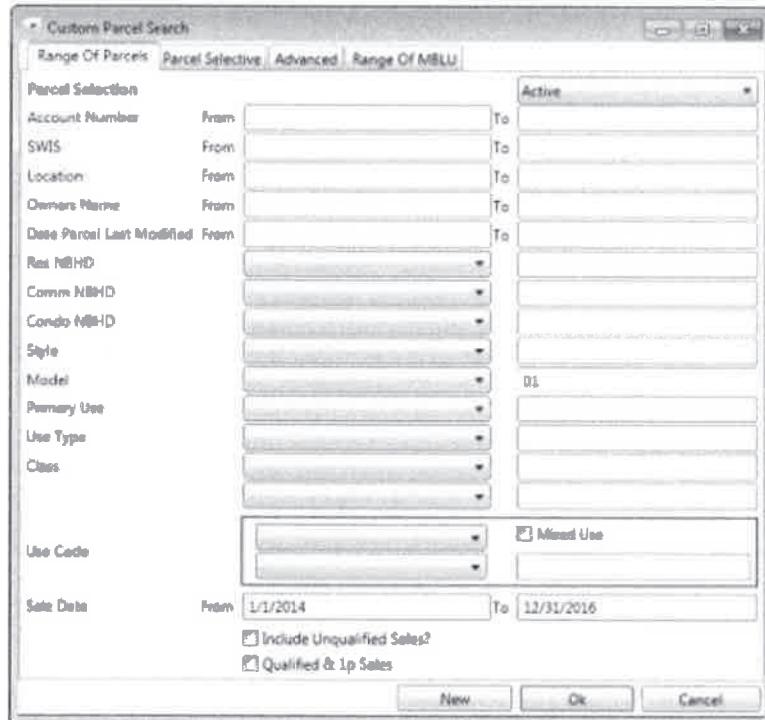
d. Once criteria are set, click OK to start the extract.

e. Select Utilities > Job Queue: **Job Queue Type** 'Comp Sales Extract' to view **Job Progress**
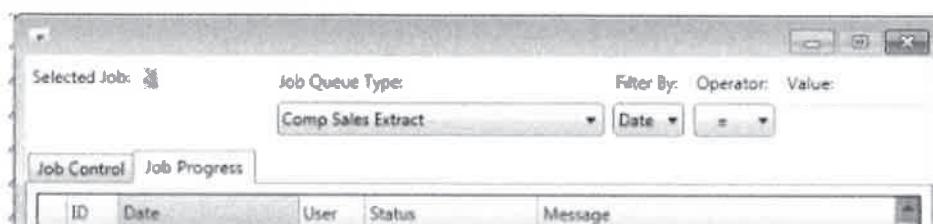
Set Comparable Sales Criteria

1. Select Comps & Apportionment > Comparable Sales Criteria

2. Define the Comp Sales model.

    a. **Code**: Model Code – Links to Comps & Apportionment > Assess Neighborhood Base Rates > Comp Sale Type

    b. **Description**: Description for code

    c. **Type**: Indicates the property type associated with the model (Residential, Commercial, Condo Unit, Condo Main)

    d. **Start Date**: Minimum date for the range of sales used in the comp model

    e. **End Date**: Maximum date for the range of sales used in the comp model

    f. **Threshold**: Maximum allowable comparable point value. The comparable sales routine assigns a point value to each comparable in relation to the subject property, based on the user defined variables. Comparables that exceed the threshold are excluded. Comparables with the lowest calculated point value are then used to calculate the value for the subject property. (This uses the Minkowski Similarity Metric: Σ (($Weight_n$/$Standard\ Deviation_n$) * $Abs(Subject\ Var_n - Comp\ Var_n)$)

    g. **Value Type**: Indicates the method used to calculate the subject property's Market Comp Sales value. (Median, Average, Exclude Hi/Low, Weighted Average)

    h. **Value Source**: Comparable property appraised value used to calculate the subject property value.

    i. **Criteria** (Not Visible): Inclusion criteria for filtering potential comparable properties. Enter a valid SQL 'where' clause (without the 'where'). Example: PARCEL.PRC_ASSNG_DIST IN ('0001','0002')

Comparable Sales Criteria

Code	Descript	Type	Start Date	End Date	Threshold	Value Type	Value Source	Criteria
DOC	Documentation	Residential	01/01/2015	12/31/2016	100,000	Median	Cost	

3. Set Comp Sales Model Variables – Click [Define] to create new models, or [Edit] to view/alter existing models.

    a. Comp Sale Variable Name Page

        i. **Variable Name**: Name of specific model (no spaces allowed)

        ii. **Description**: Description of variable

        iii. **Type**: Identify the type of model

            A. (B)inary – Converts database code to numeric value

            B. (N)umeric – Database value

            C. Match (E)xactly – Variable must match or comparable is excluded

            D. (O)BXF Group - Sum of units for OBXF Code(s); Enter a comma separated list of codes to include in the codes / formula box (Next Page)

            E. (S)ubarea – Sum of gross area for subarea code(s); Enter a comma separated list of codes to include in the codes / formula box (Next Page)

F. (D)istance – Computes the Euclidean distance between the subject parcel and the comparable. Metric = Weight or StdDev * Distance (X,Y coordinates must be populated on the Supplemental Data screen)

b. Comp Sale Database Field Page (if applicable)

   i. **Field**: Select Table / Field for the model
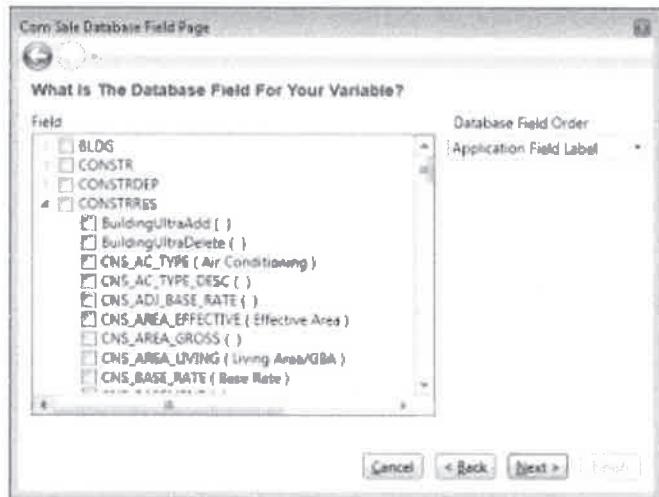
c. Comp Sale Binary Page

   i. Click the ⌈Database⌉ button to populate the grid with available codes for the data field indicated

   ii. In the **Numeric Value** column, enter the desired point value for each code. This value is multiplied by the weight indicated on the Comp Sale Weight Page.

d. Comp Sale Codes Formula Page (if applicable)

   i. Select the desired Subarea or Outbuilding codes for the model. Use a comma to separate multiple codes.

e. Comp Sale Weight Page (if applicable)

   i. Enter Weight OR Standard Deviation

      A. **Weight:** Points applied for the variable

      B. **Standard Deviation** (Numeric Only – Click the [Calc] button to calculate the value from the database)

f. Comp Sale Summary Page

    i. Review the model details

    ii. Click [Finish] to complete the model

g. Once models are complete, click [Apply] in the lower right corner of the screen.

4. Create Extract

    a. Select the desired model in the top pane of the Comparable Sales Criteria page

    b. Click [Create Extract] at the bottom of the page.

    c. The screen will show "Loading, please wait...."

    d. Upon completion, the screen will display the number of parcels included in the data extract. This extract is later used to assign comparables to subject properties.

5. Assign Comp Model to Assessing Neighborhood(s)

    a. Select Comps & Apportionment > Assess Neighborhood Base Rates

    b. Select the appropriate model in the **Building Type** pane.

Assessing Neighborhoods

Building Type

	Code	Description
	00	Vacant
▶	01	Residential
	02	Mobile Home
	03	Multi-Family
	04	Condo Main
	05	Res Condo
	06	Com Condo
	94	Comm/Ind
	95	Svc Shp/Gar
	96	Ind/Comm
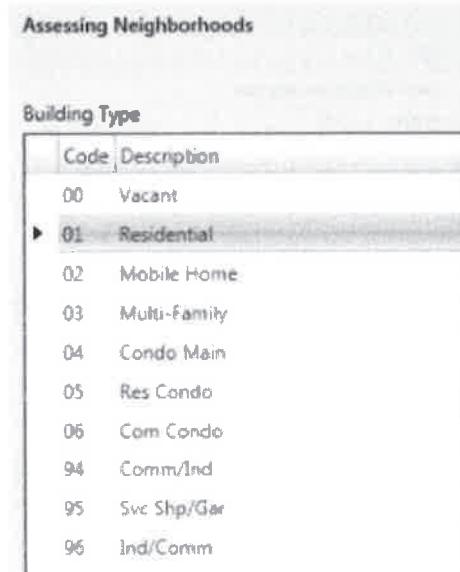
c. In the right pane, enter the desired Comparable Sale Code in the **Comp Sale Type** column for each neighborhood.

Freeze Values	Code	Description	Cost Model	Cost Trend Adj	Sale Trending	Comp Sale Type
■						
■	0001	Mahopac	Residential MDL 01 ▾	1.000	DOCS ▾	V1 ▾
■	0002	Carmel	Residential MDL 01 ▾	1.000	DOCC ▾	V1 ▾

d. Once **Comparable Sale** codes are set, click Apply in the lower right corner of the screen.

Calculate Comparable Sales Values for a Parcel

1. While in the subject parcel select Parcel > Comparables > Comp Sales Detail

Vision & Application Explorer

Parcel	«
Legal Information	≽
Classification & Land Information	≽
Building Information	≽
Outbuildings	≽
Gis	≽
Comparables	≈
Comp Sales Photo	
Comp Sales Detail	
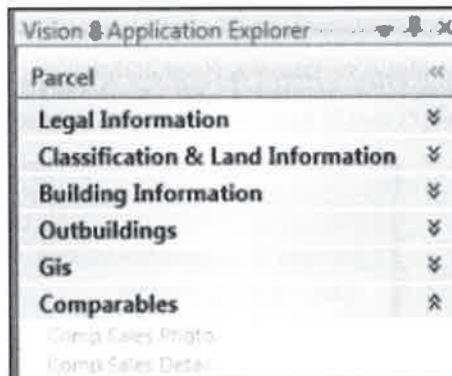
2. Click ⬛

3. The grid will display up to five comparable sales for the subject property.

4. The **Comp Model, Value Type** and **Comp Final Value** will display beneath the Parcel Information Header.

Comparable Sales Detail Model: R3-Residential 3 Value Type: Median Comp Final Value: 337,000

[Run] [Custom] [Print]   Run Date: 3/1/2017

5. To review and/or change selected comps, click [Custom]

   a. A grid will appear displaying comparable sale properties within the threshold.

   Customized Comparison Sales

	Parcel	Location	Use Code	NBHD	Sale Date	Sale Price
✓	24657	50 Upper Lake Rd	210	0001	4/7/2015	337,000
✓	25425	21 West Dr	210	0001	12/5/2014	320,000
✓	24659	99 Chestnut Ridge Rd	210	0001	6/17/2016	263,000
✓	24961	68 Albion Oval	210	0001	4/25/2016	258,000
✓	25113	305 Meadow Rd	210	0001	2/23/2016	243,700
	24957	112 Longdale Rd	210	0001	7/23/2014	335,000
	24966	183 Lake Dr	210	0001	4/12/2016	270,000
	24773	501 Wood Rd	210	0001	5/27/2014	340,000

   b. To modify the comparables used to value the subject property, de-select the undesired properties, and select alternate properties from the list. The software allows a maximum of five comparable sales. (Note: Double-click the checkbox to select or de-select a property)

   c. Once complete, click [Ok] to exit.

   d. From the Comp Sales Detail screen, click [Run] to calculate the Comp Final Value using the custom comparables.

   e. To view a summary of the selected comparables with their primary photo select Parcel > Comparables > Comp Sales Photo

Parcel	«
Legal Information	❧
Classification & Land Information	❧
Building Information	❧
Outbuildings	❧
Gis	❧
Comparables	❧
Comp Sales Photo	
Comp Sales Detail	

6. To select the Comparable Sales value as your final value for the parcel, select Parcel > Legal Information > Assessment History. Set the **Value Source** to M: Market Comps

   Assessment Summary

	Value	Date	Status	Selected Value	Appraised	Assessed
Regression	$0	8/2/2017	C	Total Appraised Bldg	$207,700	$207,700
Market Comp Sales	$337,000	8/2/2017	C	Total Appraised Extra Feature	$0	$0
Comp Apportionment	$0		C	Total Appraised Outbldg	$0	$0
Total Apportionment	$0			Total Appraised Land	$129,300	$129,300
Income	$0	8/2/2017	C	Total Value	$337,000	$337,000
Market	$300,400	8/2/2017	C			
	$0					
Marshall & Swift Cost	$0					

   Value Source | M: Market Comps

Calculate Comparable Sales Values for a Group of Parcels

1. Select Utilities > Recalc Parcels > Recalc Selected Parcels

2. In the **Schedule Options**, de-select all **Recalculation Methods**, then select **Run Comparable Sales**. Indicate whether the job should be **Run Now** or **Run Later**. Then click Schedule.
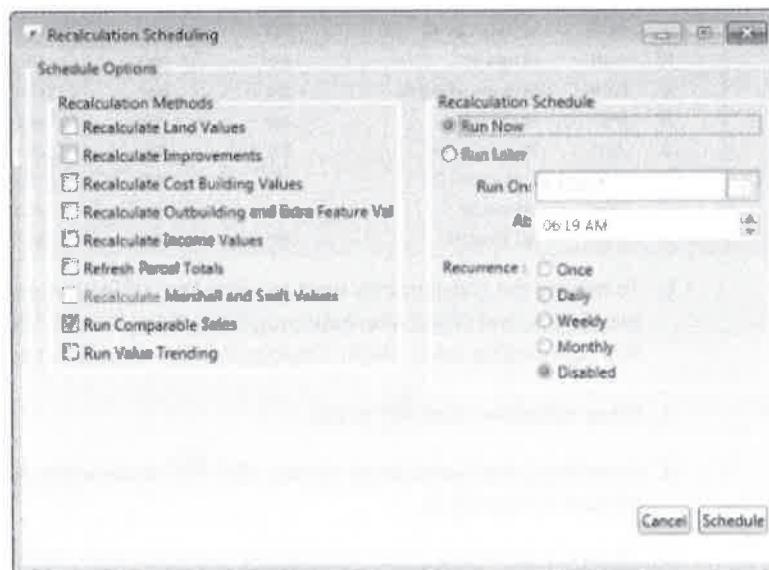
3. Indicate the filter criteria and click Ok to start the comparable sales calculation.
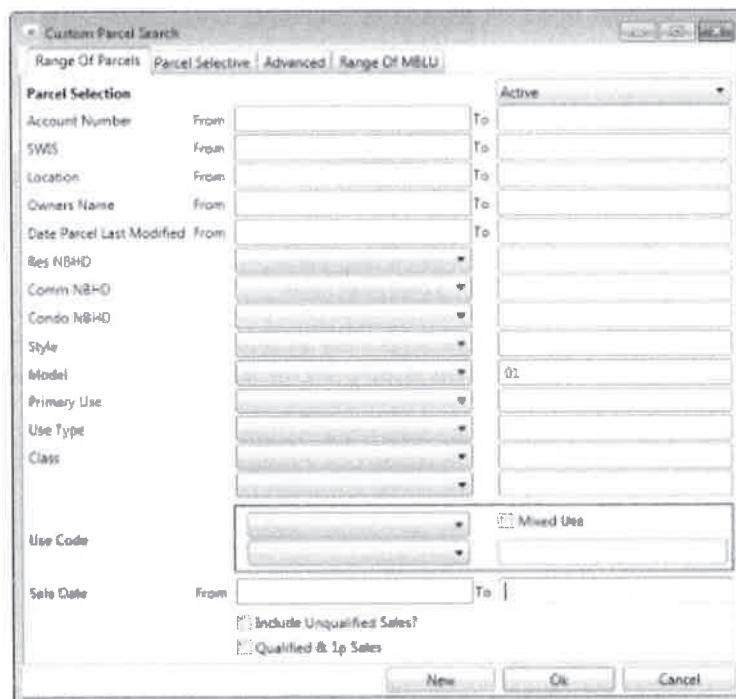
4. Select Utilities > Job Queue: **Job Queue Type** 'Recalculate Parcels' to view **Job Progress**
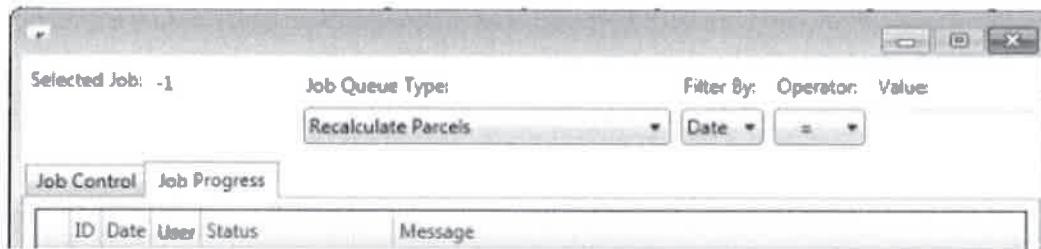
5. Once complete, calculated values can be accessed either via creating a report in the Report Wizard, or by viewing individual parcels.

⊙ **VISION**

GOVERNMENT SOLUTIONS

How to Recalculate Marshall & Swift Values

This document outlines the process to recalculate Marshall & Swift Values in the Vision. This is a two-step process. First, the software requires a Marshall and Swift recalc to populate the MVP generated values in Vision. Second, a full recalc is required to integrate the MVP values into the Vision valuation engine.

1. Open the Vision CAMA application.

2. Select Utilities > Recalc Parcels > Recalc Select Parcels
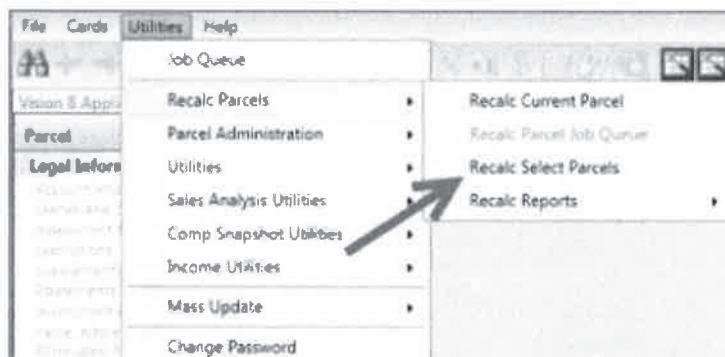
3. In Recalculation Scheduling, alter the Scheduling Options so that only the Recalculate Land Values and Recalculate Marshall and Swift Values options are selected, then click Schedule.
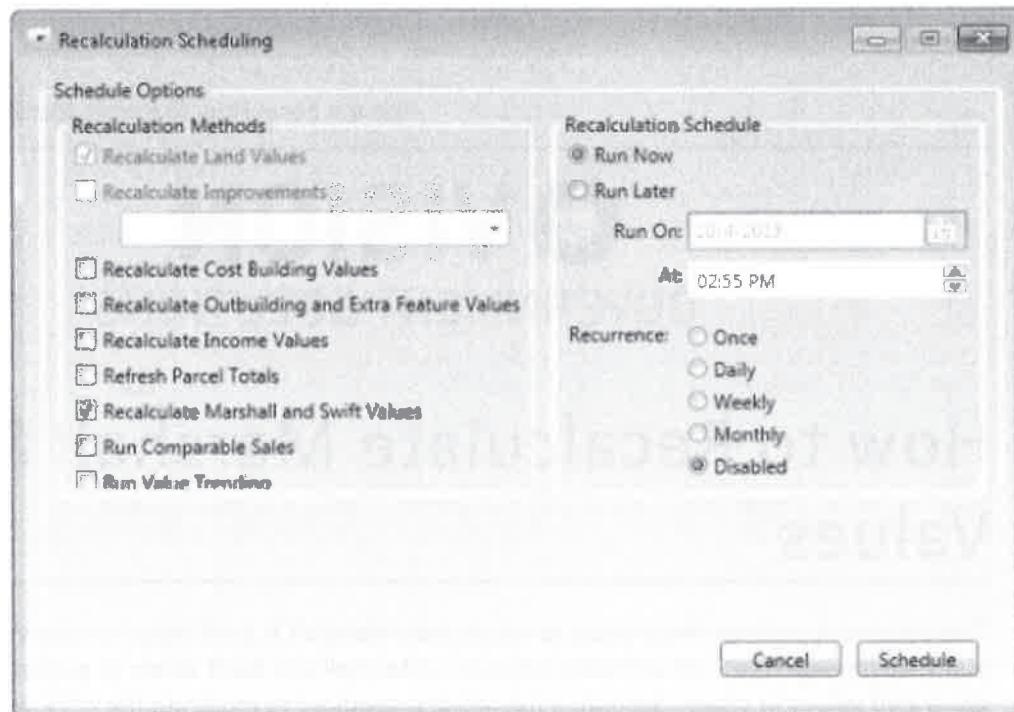
4. Configure the Custom Parcel Search to target the required parcels, then click Ok.
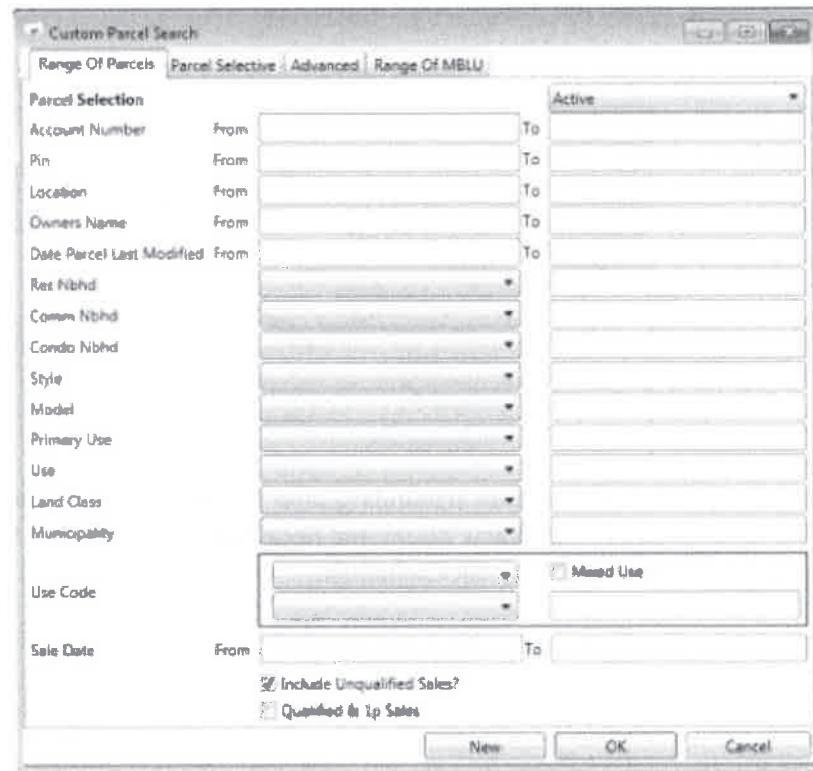
5. To monitor the Job Progress for the Marshall & Swift recalc, navigate to Utilities > Job Queue. Select Recalculate Parcels from the Job Queue Type. Then click Refresh to update the Job Progress. Once the job is complete, proceed to the next step.

Selected Job: .1 Job Queue Type: Recalculate Parcels Filter By: Date Operator: = Value:

Job Progress | Job Control

ID	Date	User	Status	Message
196	10/04/2018 02:55 PM	ADMIN	RUNNING	Processing 0% complete.
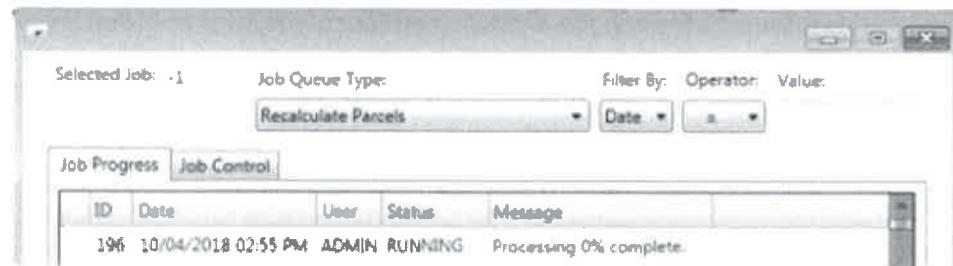
6. Repeat the above steps to run the second recalc, except alter the Scheduling Options in the Recalculation Scheduling Settings. For this recalc, retain the default recalculation settings.

Recalculation Scheduling

Schedule Options

Recalculation Methods
- Recalculate Land Values
- Recalculate Improvements
- Recalculate Cost Building Values
- Recalculate Outbuilding and Extra Feature Values
- Recalculate Income Values
- Refresh Parcel Totals
- Recalculate Marshall and Swift Values
- Run Comparable Sales
- Run Value Trending

Recalculation Schedule
- Run Now
- Run Later

Run On:

At: 03:07 PM

Recurrence:
- Once
- Daily
- Weekly
- Monthly
- Disabled

Cancel   Schedule

◎ VISION

GOVERNMENT SOLUTIONS

Common Updates Using Mass Update

The Mass Update utility is a powerful tool. Make sure there is a valid database backup file created prior to using this tool, as once the process is executed, changes cannot be reversed. Having a valid backup file ensures that any changes can be reverted back to an older day's status, if necessary. Contact Customer Support if you need assistance with ensuring you have a valid database backup.

1. From the top-most menu bar, click on **Utilities-Mass Update-Update Fields-Common Updates**

2. The **Mass Update Selection Parcels screen** will pop up. From here, select an option:
   - **Advanced Search** allows the user to create their own list of parcels to update
   - **Existing Report** indicates that a specific report contains the proper parcels to be edited.

- **GIS** indicates the parcel information was gathered from the GIS module (this option will only be populated if the GIS module is installed with the CAMA system)

In this example, all parcels with a **Primary Use** of 100U: SFD – Urban Condo will be updated to a new **Land Zone**.

3. Using **Advanced Search**, on the **Range of Parcels** tab in the **Primary Use** section select 100U: SFD – Urban Condo and click **OK.**

4. A list of parcels will appear in the **Preview** section below that qualify based upon the selection entered along with a **Parcel Count** showing the number of targeted parcels.

5. Under the **Land Attributes** section, select the Zoning Drop box and choose ZB from the list and click OK:

6. The list of parcels in the **Preview** section at the bottom of the screen will now display the parcel information, including the new **Zone** code and a count of how many parcels will be impacted by the change.

Preview

PID	LND_NBHD	LND_ZONE	LND_DSTR
19		ZB	
18		ZB	
21		ZB	
20		ZB	

Count: 4

7. If the information appears as intended click the **Mass Update** button in the lower right-hand section of the screen.

| Cancel | Mass Update |
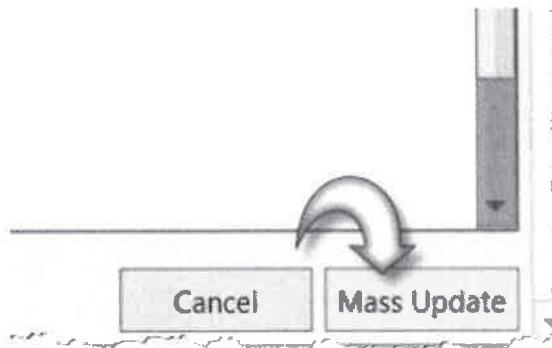
8. A notice will appear asking if you are sure you want to update the database with the preview data. Choose **Yes** to apply the Mass Update

Mass Update

Are you sure you want to update database with preview data?

Yes   No
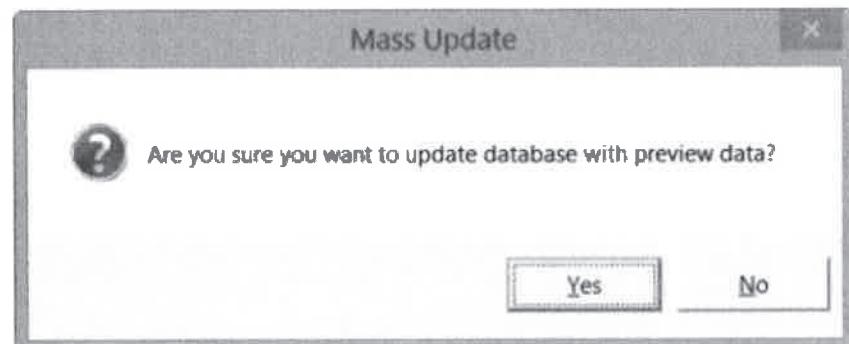
9. When the update is done, a final message will appear.
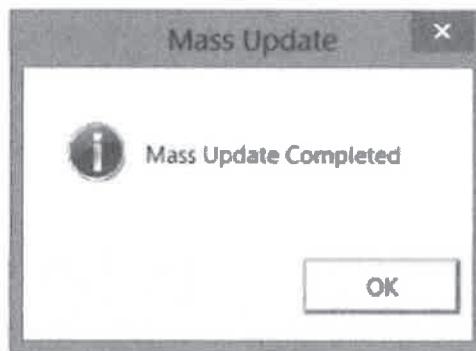
10. Click **OK**.

To confirm **the change to the Zone** was applied as intended, navigate to any of the previously selected parcels and view the **Classification and Land Information** section. The Building Classification and Land Line valuation screen should now show the **ZONE** as **ZONE B**

○ VISION

GOVERNMENT SOLUTIONS

Advanced Updates Using Mass Update

The Mass Update utility is a powerful tool. Make sure there is a valid database backup file created prior to using this tool, as once the process is executed, changes cannot be reversed. Having a valid backup file ensures that any changes can be reverted back to an older day's status, if necessary. Contact Customer Support if you need assistance with ensuring you have a valid database backup.

1. From the top-most menu bar, click on **Utilities-Mass Update-Update Fields-Advance Updates**
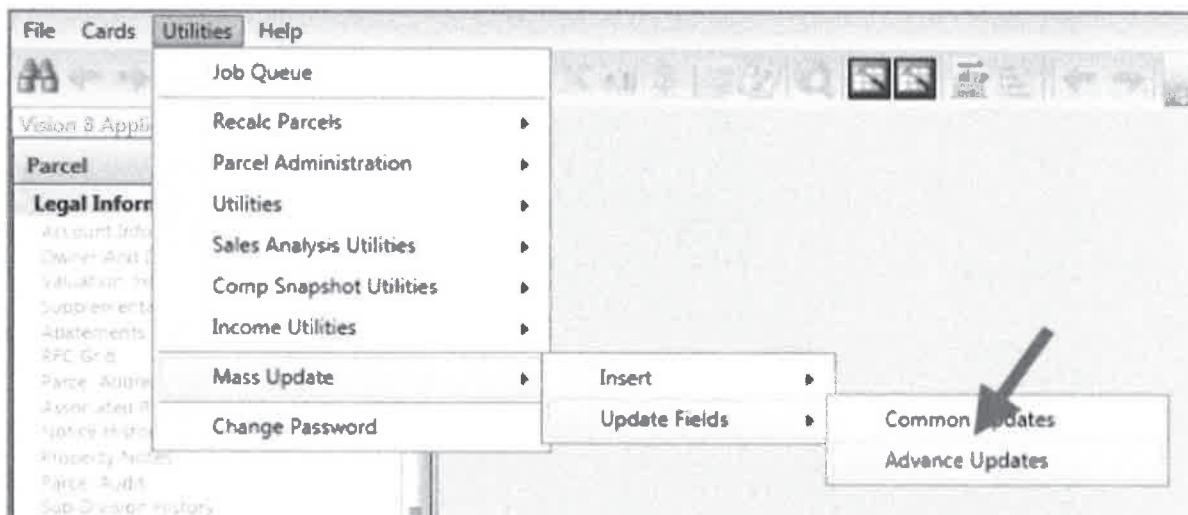
2. The **Mass Update Selection Parcels** screen will pop up. From here, select an option:
   - **Advanced Search** allows the user to create their own list of parcels to update
   - **Existing Report** indicates that a specific report contains the proper parcels to be edited.
   - **GIS** indicates the parcel information was gathered from the **GIS Module** (this option will only be populated if the GIS module is installed with the CAMA system)

Mass Update

Selection Parcels
- ◉ Advanced Search
- ○ Existing Report
- ○ Gis

Range Of Parcels	Parcel Selective	Advanced	Range Of MBLU

Parcel Selection   Active ▾

Account Number	From		To	
District	From		To	
Location	From		To	
Owners Name	From		To	
Date Parcel Last Modified	From		To	
Res NBHD		▾		
Comm NBHD		▾		
Condo NBHD		▾		
Style		▾		
Model		▾		
Building Class		▾		
Use Type		▾		
Class		▾		
		▾		

Use Code   ▾   ☐ Mixed Use
           ▾

Sale Date	From		To	

☑ Include Unqualified Sales?
☐ Qualified & 1p Sales

☐ Recalc After Update

Advance Updates

Application Field Label

🔘 In this example, all parcels with a **Primary Use** of 100U: SFD – Urban Condo will be updated by changing the PARCEL table, field PRCL_DESCRIPTION on ALL identified parcels to **Vision Documentation Project**.

3. Using **Selection Parcels: Advanced Search**, on the **Primary Use / Building Class** section, select 210: Single Family and click **OK**
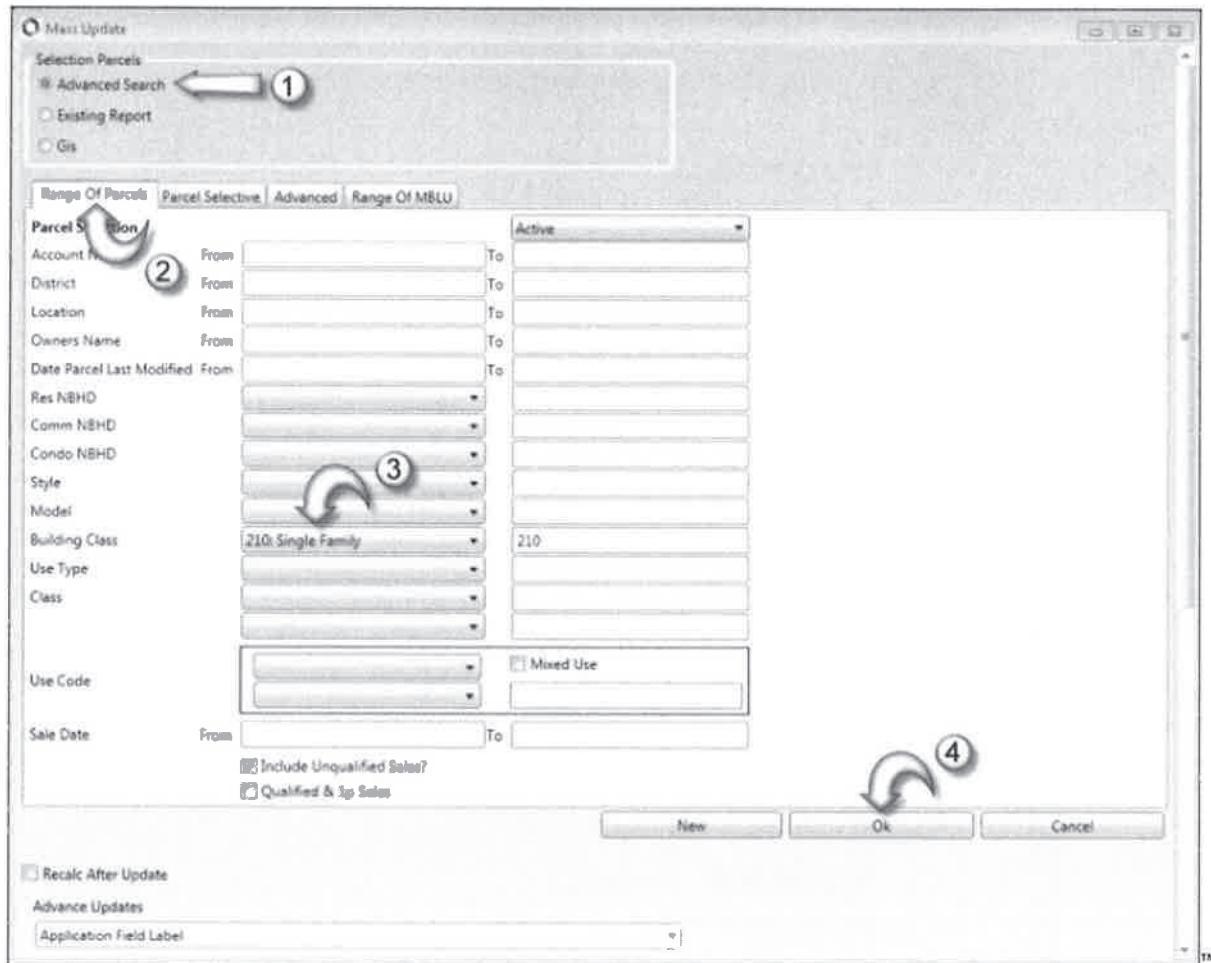
4. A count of parcels will appear beneath the **Preview** section of the page that qualify based upon the selection entered.

5. Under the **Advance Updates** section, scroll down to the **PARCEL** table and click on the drop arrow
   ▶ to display all associated PRC fields.

Advance Updates

Application Field Label

- ☐ OVRADJ
- ☐ PARCEL
  - ☐ PRC_AGI_PGSF (Agi Pgsf)
  - ☐ PRC_ALT_ACRES_TO_APPLY (Alt Acres To Apply)
  - ☐ PRC_ALT_APPROVED (Alt Land Approved)
  - ☐ PRC_ALT_UOM (Alt Unit Of Measure)
  - ☐ PRC_ALT_UOM_TYPE (Alt Unit Of Measure Type)
  - ☐ PRC_APPORTN_ADJ (Apportionment Adj)
  - ☐ PRC_APPORTN_DATE (Apportn Date)

6. The list of fields will appear. Scroll to the field **PRC_DESCRIPTION** and place a check in the left-hand select box. This will add the field to the update section below.

Advance Updates

Application Field Label

- ☐ PRC_DEPTH (Depth)
- ☑ PRC_DESCRIPTION (Parcel Description)
- ☐ PRC_EFFECTIVE_AREA (Effective Area)
- ☐ PRC_EXP_PGSF (Exp Pgsf)
- ☐ PRC_FRONTAGE (Frontage)
- ☐ PRC_GIS_AREA (Gis Area)
- ☐ PRC_GIS_PERIMETER (Gis Perimeter)
- ☐ PRC_GIS_REGION (Gis Region)
- ☐ PRC_GROSS_AREA (Gross Area)

Table Name	Field Name	Value
PARCEL	PRC_DESCRIPTION	

7. Double click in the value field to add the information required for the mass update of the **DESCRIPTION** field.

Table Name	Field Name	Value
PARCEL	PRC_DESCRIPTION	Vision Documentation Project

8. If the information appears as intended click the **Mass Update** button in the lower right-hand section of the screen.
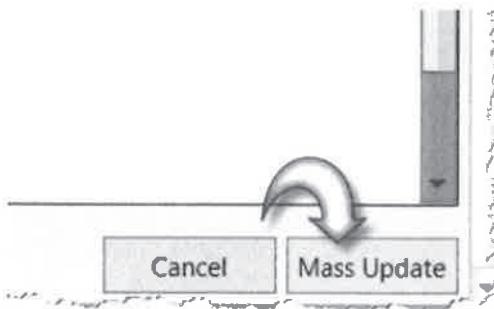
9. A notice will appear asking if you are sure you want to update the database with the preview data. Choose **Yes** to apply the Mass Update.
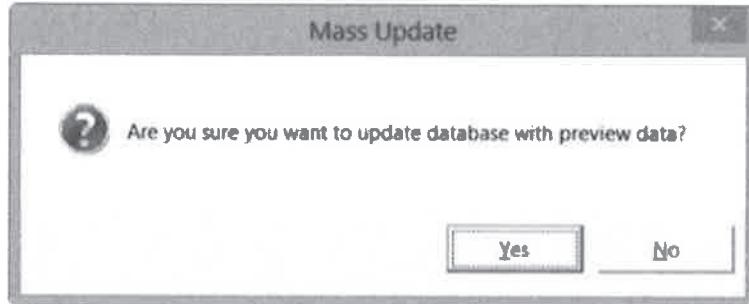
10. When the update is done, a final message will appear
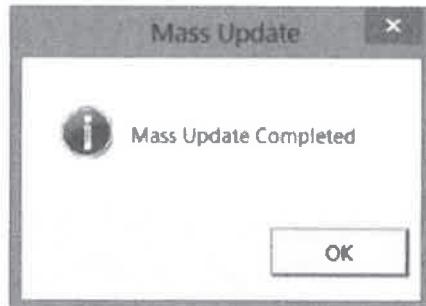
11. Click **OK.**

To confirm the change the **Parcel Description** was applied as intended, navigate to any of the previously selected parcels and view the **Supplemental Data** section. The Parcel Information screen should now show a Parcel Description of **Vision Documentation Project**.

Entity					
Gis ID	04200000010010010000	X Coordinate	694972.0787	Y Coordinate	946189.4185
Parcel Description	Vision Documentation Project				

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GOVERNMENT SOLUTIONS

How to Add Notes Using Mass Update

The Mass Update utility is a powerful tool. Make sure there is a valid database backup file created prior to using this tool, as once the process is executed, changes cannot be reversed. Having a valid backup file ensures that any changes can be reverted back to an older day's status, if necessary. Contact Customer Support if you need assistance with ensuring you have a valid database backup.

1. In the **Report** module, from the top-most menu bar, click on **Utilities--Mass Update-Insert-Notes**

2. The **Selection Parcels** screen will pop up. From here, either select an option:

   - **Advanced Search** allows the user to create their own list of parcels to update

   - **Existing Report** indicates that a specific report contains the proper parcels to be edited.

   - **GIS** indicates the parcel information was gathered from the GIS module (this option will only be populated if the GIS module is installed with the CAMA system)

ⓘ In this example, all parcels with a **Primary Use** of 100U: SFD – Urban Condo will be updated.

3. Using **Advanced Search**, on the **Range of Parcels** tab in the **Primary Use** section select 100U: SFD – Urban Condo and click **OK**

4. A list of parcels will appear in the **Preview** section below that qualify based upon the selection entered along with a **Parcel Count** showing the number of targeted parcels.

5. In the **Notes** section, select the **Note Type** from the drop-down box.

6. Enter the **Year** and a **Note** for these parcels and click on the **OK** button again.

7. The **Preview** pane shows the **Note** applied to each parcel.

| Parcel ID	Type	Year	Note	Private
4	REM	2014	Sample note using Mass Update	True
5	REM	2014	Sample note using Mass Update	True
6	REM	2014	Sample note using Mass Update	True
7	REM	2014	Sample note using Mass Update	True
18	REM	2014	Sample note using Mass Update	True
19	REM	2014	Sample note using Mass Update	True
20	REM	2014	Sample note using Mass Update	True
21	REM	2014	Sample note using Mass Update	True

8. If the information appears as intended click the **Mass Update** button in the lower right-hand section of the screen.
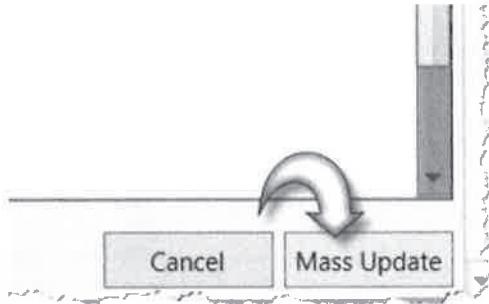
9. A notice will appear asking if you are sure you want to update the database with the preview data. Choose **Yes** to apply the Mass Update.
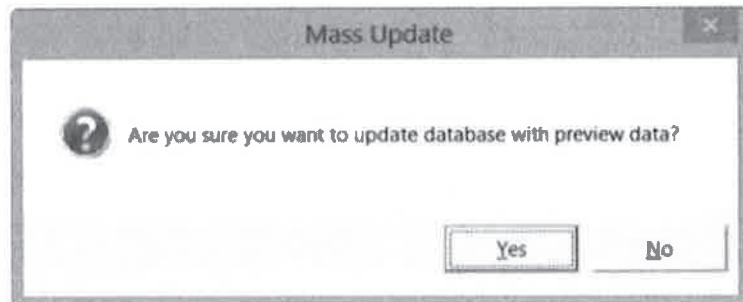
10. When the update is done, a final message will appear.
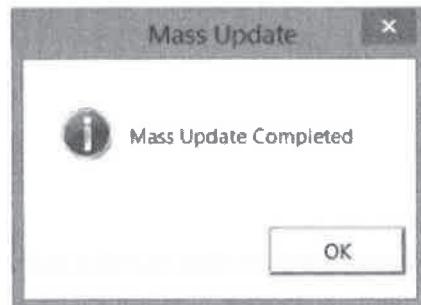
11. Click **OK** to return to the Report module.

12. To confirm the **Note** was applied as intended, navigate to any of the previously selected parcels and view the **Property Notes** section under the **Legal Information** heading.

13. Highlight the newly added **Visit History** line to see that it includes the information from the initial update as a line entry, and a summary will display in the bottom of the pane.

Parcel Information

MBLU: 100/ / 20/ / 30/ /	Primary Use: 100U	Use Type:	Internal ID: 20
Location: 20 N MAIN ST ST W UNIT #A	Total Assesse $155,100	Land Acres: 0.00

Property Notes

	Type	Desc	Year	Note	Private	Date Created
▶	REM		2014	Sample Note using Mass Update		10/24/2014
	REM	Remarks	2014	Building set back from the road		01/01/2014

[Add Property Notes] [Delete Property Notes]

Type REM: Remarks ▾

Year 2014

Note Sample Note using Mass Update

☐ Private

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GOVERNMENT SOLUTIONS

How to Add Notice History Using Mass Update

The Mass Update utility is a powerful tool. Make sure there is a valid database backup file created prior to using this tool, as once the process is executed, changes cannot be reversed. Having a valid backup file ensures that any changes can be reverted back to an older day's status, if necessary. Contact Customer Support if you need assistance with ensuring you have a valid database backup.

1. In the **Report** module, from the top-most menu bar, click on **Utilities--Mass Update-Insert-Notice History**
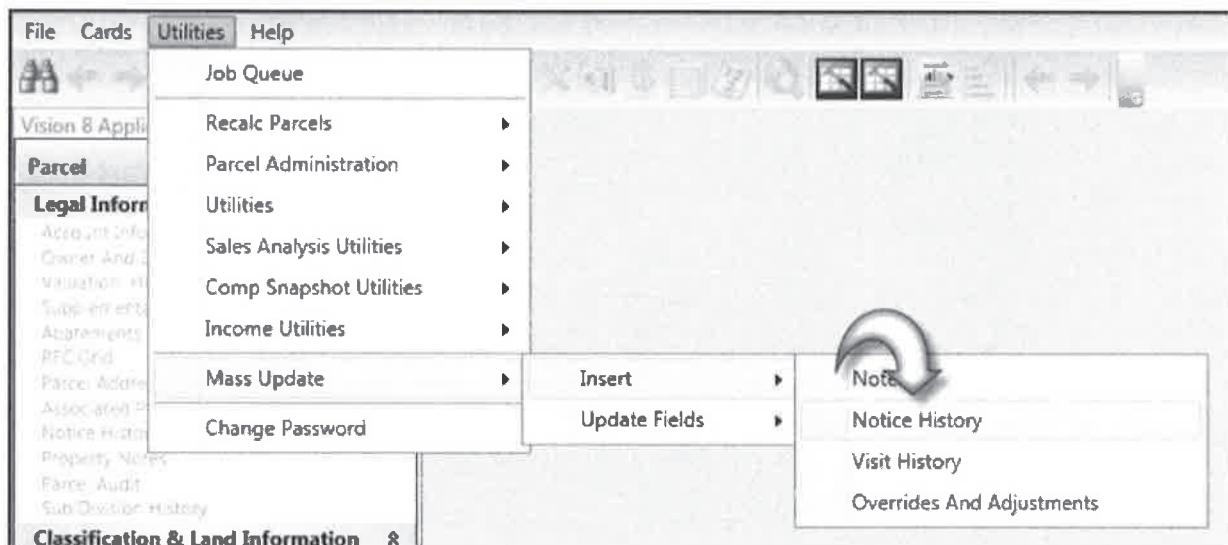
2. The **Selection Parcels screen** will pop up. From here, select an option:
   - **Advanced Search** allows the user to create their own list of parcels to update
   - **Existing Report** indicates that a specific report contains the proper parcels to be edited.
   - **GIS** indicates the parcel information was gathered from the GIS module (this this option will only be populated if the GIS module is installed with the CAMA system)

ℹ️ In this example, all parcels with a **Primary Use** of 100U: SFD – Urban Condo will be updated.

3. Using **Advanced Search**, on the Primary Use section, select 100U: SFD – Urban Condo and click **OK**
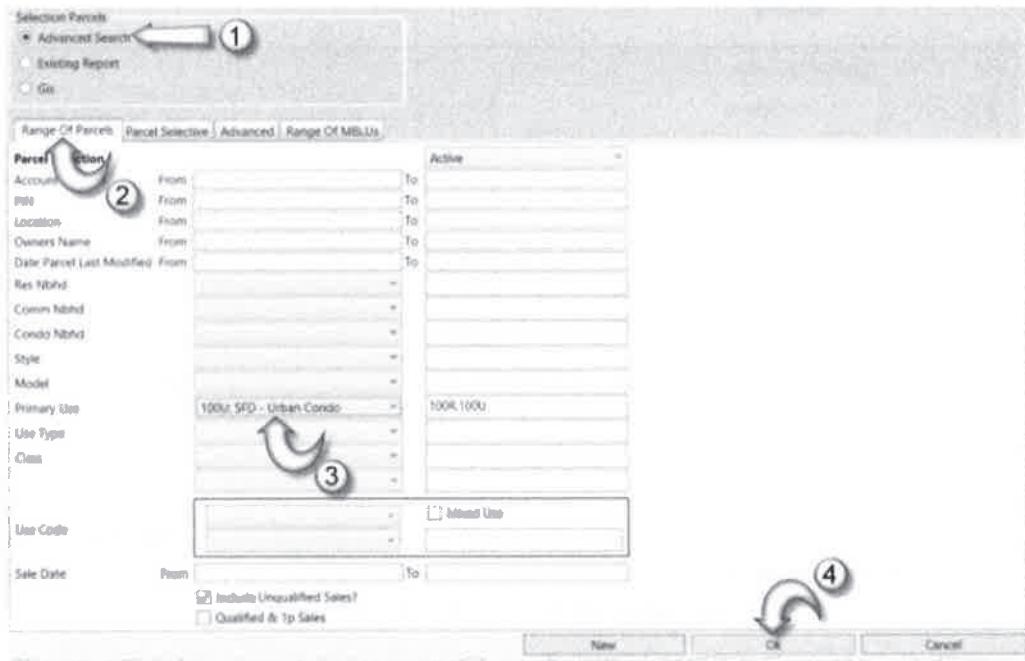
4. In the **Preview** section, a list of parcels will appear that qualify based upon the selection entered including a **Parcel Count** of the total number of parcels targeted.

5. In the **Notice History** section, enter the **Fiscal Year** to which the note will be applied, a **Notice Date**, **Notice Code**, and **Notice Type.**

6. Add a **Comment**, if necessary.

7. Click the upper **OK** box again.

8. The **Preview** pane shows the **Notice History** applied to each parcel.

	PID	Fiscal Yr	Date	Notice Code	Notice Type	Response Date	R
	18	2014	10/23/2014 12:00:00 AM	GENR	RGLM		
	19	2014	10/23/2014 12:00:00 AM	GENR	RGLM		
	20	2014	10/23/2014 12:00:00 AM	GENR	RGLM		
	21	2014	10/23/2014 12:00:00 AM	GENR	RGLM		

9. Should the **Notice History** appear as intended, click the **Mass Update** button in the lower right-hand section of the screen.
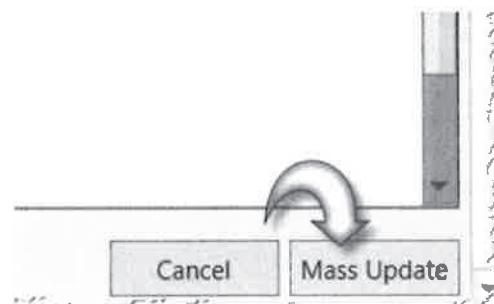
10. A notice will appear asking if you **are sure you want to update the database with the preview data.** Choose **Yes** to apply the Mass Update
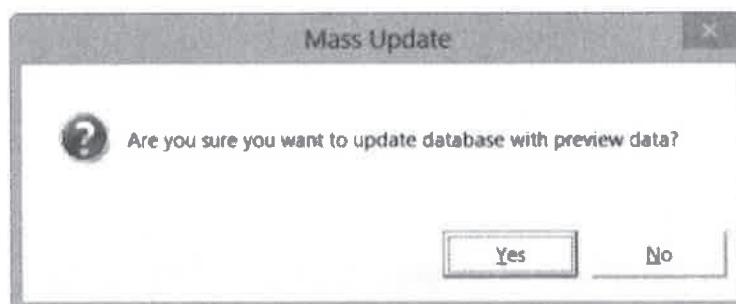
11. When the update is done, a final message will appear.
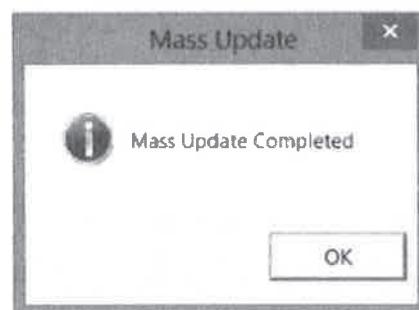
12. Click **OK** to return to the Report module.

13. To confirm the **Notice History** was applied as intended, navigate to any of the previously selected parcels and view the **Notice History** section. Highlight the newly added **Notice History** line to see

that it includes the information from the initial update as a line entry, and a summary will display in the bottom of the pane.

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GOVERNMENT SOLUTIONS

How to Add Visit History Using Mass Update

The Mass Update utility is a powerful tool. Make sure there is a valid database backup file created prior to using this tool, as once the process is executed, changes cannot be reversed. Having a valid backup file ensures that any changes can be reverted back to an older day's status, if necessary. Contact Customer Support if you need assistance with ensuring you have a valid database backup.

1. In the **Report** module, from the top-most menu bar, click on **Utilities--Mass Update-Insert-Visit History**

2. The **Selection Parcels** screen will pop up. From here, either select an option:

   - **Advanced Search** allows the user to create their own list of parcels to update

   - **Existing Report** indicates that a specific report contains the proper parcels to be edited.

   - **GIS** indicates the parcel information was gathered from the GIS module (this this option will only be populated if the GIS module is installed with the CAMA system

In this example, all parcels with a **Primary Use** of 100U: SFD – Urban Condo will be updated.

3. Using **Advanced Search**, on the Primary Use section, select 100U: SFD – Urban Condo and click **OK**

4. A list of parcels will appear in the **Preview** section below that qualify based upon the selection entered along with a **Parcel Count** showing the number of targeted parcels.

Preview

Parcel ID	Type	Year	Note	Private
1				False
2				False
3				False
4				False
5				False
6				False
7				False
15				False

Count 12   Cancel   Mass Update

5. Select the required fields in the **Visit History** section drop-boxes.

- **Date**
- **Purpose**
- **Initials**
- **Info Source**
- **Result**

Visit History

Date	10/23/2014		Purpose	VS: VISIT
Initials	AO: Assessor Office		Info Source	1: Owner
Result	01: Owner Home			
Notes				

6. Enter a **Note** for these parcels, if required, and click the **OK** button in the upper right-hand section of the screen.

                                New   Ok   Cancel

Visit History

Date	10/23/2014		Purpose	VS: VISIT
Initials	AO: Assessor Office		Info Source	1: Owner
Result	01: Owner Home			
Notes	Sample Visit History Note			

7. The **Preview** pane shows the **Visit History** information that will be applied to each parcel.

Preview

| Parcel ID	Bldg ID	Date	Initials	Purpose	Result	Info Source	Notes
1	1	10/23/2014 12:00:00	AO	VS	01	1	Sample Visit
2	2	10/23/2014 12:00:00	AO	VS	01	1	Sample Visit
3	3	10/23/2014 12:00:00	AO	VS	01	1	Sample Visit
4	4	10/23/2014 12:00:00	AO	VS	01	1	Sample Visit
5	5	10/23/2014 12:00:00	AO	VS	01	1	Sample Visit
6	6	10/23/2014 12:00:00	AO	VS	01	1	Sample Visit
7	7	10/23/2014 12:00:00	AO	VS	01	1	Sample Visit
8	8	10/23/2014 12:00:00	AO	VS	01	1	Sample Visit

Count 30   Cancel

8. If the information appears as intended click the **Mass Update** button in the lower right-hand section of the screen.

9. A notice will appear asking if you are sure you want to update the database with the preview data. Choose **Yes** to apply the Mass Update.

10. When the update is done, a final message will appear.

11. Click **OK** to return to the Report module.

12. To confirm the **Visit History** was applied as intended, navigate to any of the previously selected parcels and view the **Visit History** section under the **Building Information** heading.

13. Highlight the newly added **Visit History** line to see that it includes the information from the initial update as a line entry, and a summary will display in the bottom of the pane.

Visit History

Bldg	Date	Initials	Name	Result	Result Description	Purpose	Purpose Description	Notes
▶ 1	10/24/2014	AO		01		VS		Sample Visit History note
1	01/01/2014	AO		00		VS		

[Add] [Delete]

Details

Bldg	1
Date	10/24/2014 [15]
Info Source	1
Initials	AO: Assessor Office
Line Num	2
Result	01: Owner Home
Purpose	VS: VISIT
Notes	Sample Visit History note

○ **VISION**

GOVERNMENT SOLUTIONS

How to Add Visit History Using Mass Update

The Mass Update utility is a powerful tool. Make sure there is a valid database backup file created prior to using this tool, as once the process is executed, changes cannot be reversed. Having a valid backup file ensures that any changes can be reverted back to an older day's status, if necessary. Contact Customer Support if you need assistance with ensuring you have a valid database backup.

1. In the **Report** module, from the top-most menu bar, click on **Utilities--Mass Update-Insert-Visit History**

2. The **Selection Parcels** screen will pop up. From here, either select an option:

   - **Advanced Search** allows the user to create their own list of parcels to update

   - **Existing Report** indicates that a specific report contains the proper parcels to be edited.

   - **GIS** indicates the parcel information was gathered from the GIS module (this this option will only be populated if the GIS module is installed with the CAMA system

In this example, all parcels with a **Primary Use** of 100U: SFD – Urban Condo will be updated.

3. Using **Advanced Search**, on the Primary Use section, select 100U: SFD – Urban Condo and click **OK**

4. A list of parcels will appear in the **Preview** section below that qualify based upon the selection entered along with a **Parcel Count** showing the number of targeted parcels.

5. Select the required fields in the **Visit History** section drop-boxes.

   - **Date**
   - **Purpose**
   - **Initials**
   - **Info Source**
   - **Result**

6. Enter a **Note** for these parcels, if required, and click the **OK** button in the upper right-hand section of the screen.

7. The **Preview** pane shows the **Visit History** information that will be applied to each parcel.


8. If the information appears as intended click the **Mass Update** button in the lower right-hand section of the screen.

9. A notice will appear asking if you are sure you want to update the database with the preview data. Choose **Yes** to apply the Mass Update.

10. When the update is done, a final message will appear.

11. Click **OK** to return to the Report module.

12. To confirm the **Visit History** was applied as intended, navigate to any of the previously selected parcels and view the **Visit History** section under the **Building Information** heading.

13. Highlight the newly added **Visit History** line to see that it includes the information from the initial update as a line entry, and a summary will display in the bottom of the pane.

Visit History

	Bldg	Date	Initials	Name	Result	Result Description	Purpose	Purpose Description	Notes
►	1	10/24/2014	AO		01		VS		Sample Visit History note
	1	01/01/2014	AO		00		VS		

[Add] [Delete]

Details

Bldg	1
Date	10/24/2014
Info Source	1
Initials	AO: Assessor Office
Line Num	2
Result	01: Owner Home
Purpose	VS: VISIT
Notes	Sample Visit History note

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Y2K Extract – Real Estate

The purpose of this document is to assist the user in generating an export of the database in the Y2K format. The Y2K format is Vision's standard billing extract. There are two versions of the Y2K extract, one for Real Estate and another for Personal Property. These instructions are for running the **Y2K Real Estate** extract.

> *Please ensure the path C:\Vision8\LogFiles exists and the Windows' user account has full read/write access. The extract will fail if the path is not available, create the folder if it is not present and confirm permissions are set appropriately.*

1. Please ensure all other users are logged out the database before beginning the Y2K extract. Users should remain logged out for the duration of the extract

2. To begin, log into the database on which you wish to run the Y2K extract.

3. For the **Y2K Real Estate Data Extract** select **Utilities, Utilities, Standard Extracts**, then **Y2K Real Estate Extract.**

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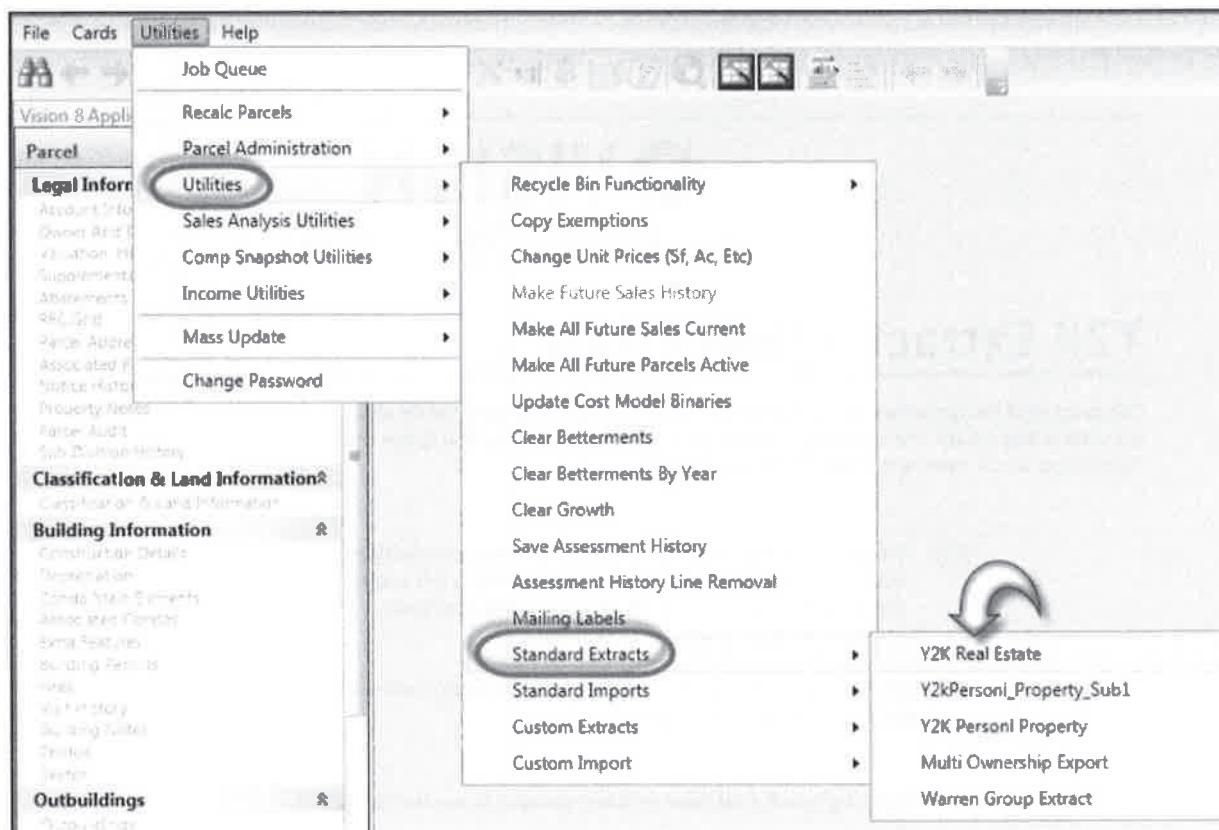
The **Y2K Real Estate** extract screen will appear.
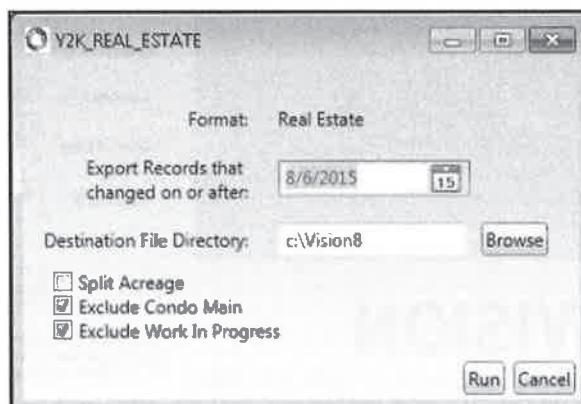
4. The **Export Records that changed on or after** section allows the user to only include those parcels with a modified date equal to or greater than the date entered. Leave this field blank to select **ALL** parcels.

You may either enter a date in the mm/dd/yyyy format or click on the calendar icon and select the date by navigating to the month and clicking the day concerned.
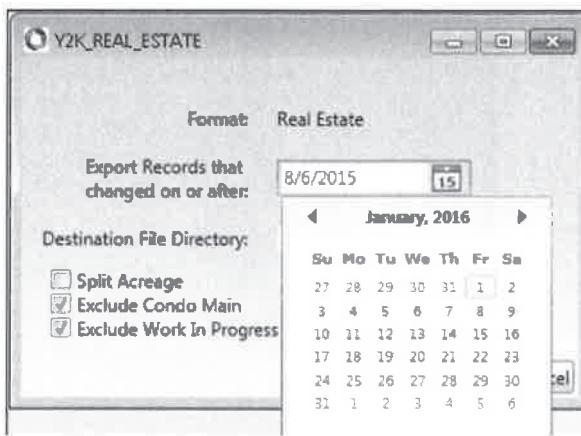
Once the date is selected it will fill the date in the date field
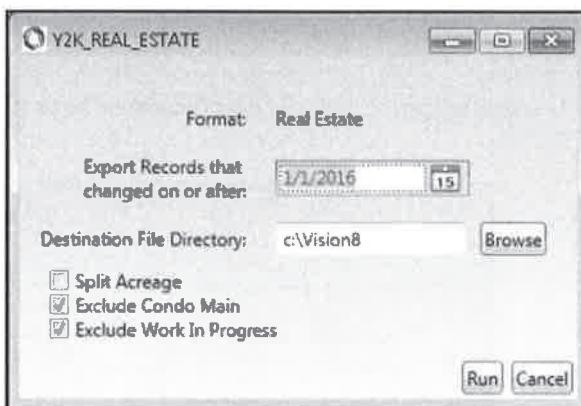
5. The **Destination File Directory** is the location to which the resulting extract and layout files will be written. The default directory is C:\Vision8.

To change the location the files will be written to, you may either type the path manually in the **Destination File Directory** or use the **Browse** button to select a location.
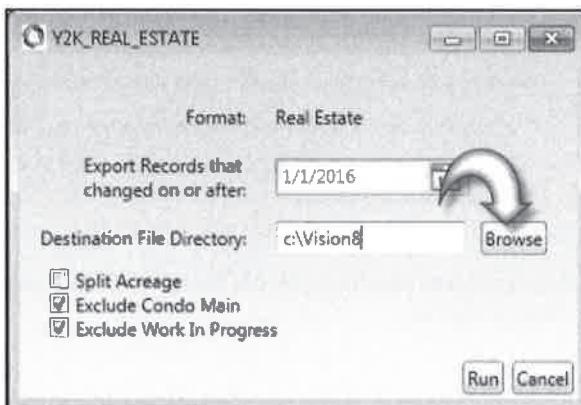
If using the **Browse For Folder**, first select the folder and then select **OK**.

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The desired path will be populated in the **Destination File Directory** field.

6. The last step before beginning the extract is to review the options in the two checkboxes. To select either option, click in the box for the selection concerned.

   ○ Checking **Split Acreage** will result in values for each land line being separated in the extract.

   ○ Checking **Exclude Condo Main** will cause the extract to omit all Condo Main parcels.

   ○ Checking **Exclude Work In Progress** will cause the extract to omit all parcels flagged as work in progress on the Supplemental Data screen.

Please check with your billing software vendor's Y2K import procedures to confirm if either should be selected.

7. Once all above steps are complete, select **Run** to begin the extract process.

A notification will appear confirming the job is now running. Click **OK** to close the window.

This job will now run in a separate thread. For progress updates please check the Job queue or PROGRESS table or the log files.

OK
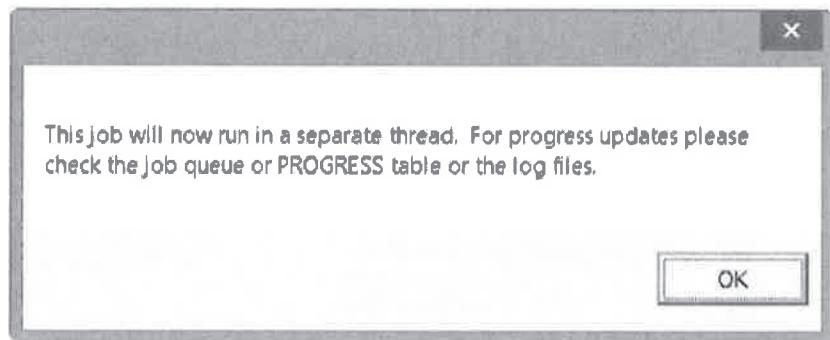
8. To check the status of the export, select **Utilities** then **Job Queue**.

Utilities

Job Queue

Rec... Parcels

Parcel Administration

Utilities

Sales Analysis Utilities

Comp Snapshot Utilities

Change Password
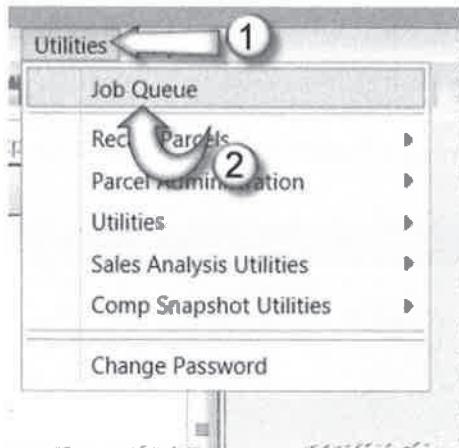
The **Job Queue** screen will open.
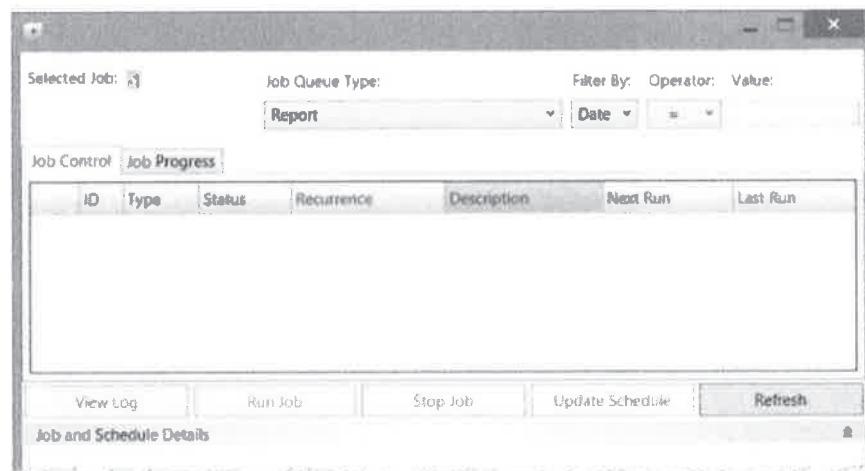
9. To check the status of the extract, click the drop down under **Job Queue Type** and select **Y2K Real Estate**.
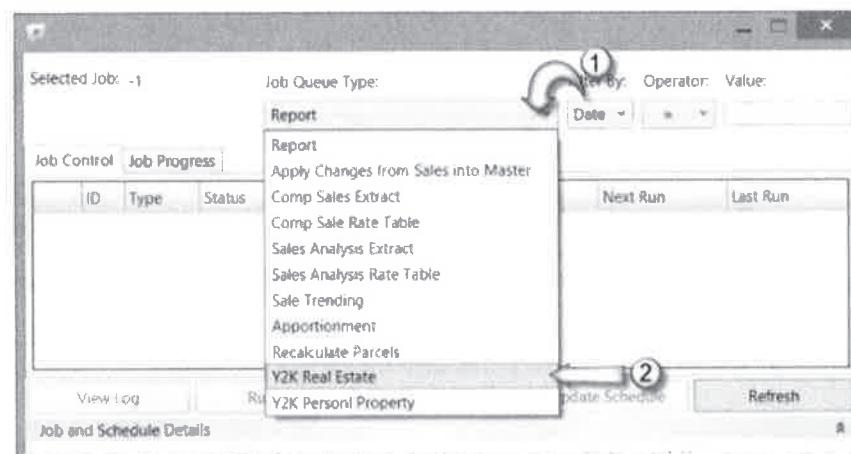
10. Next select the **Job Progress** tab and click the **Refresh** button.
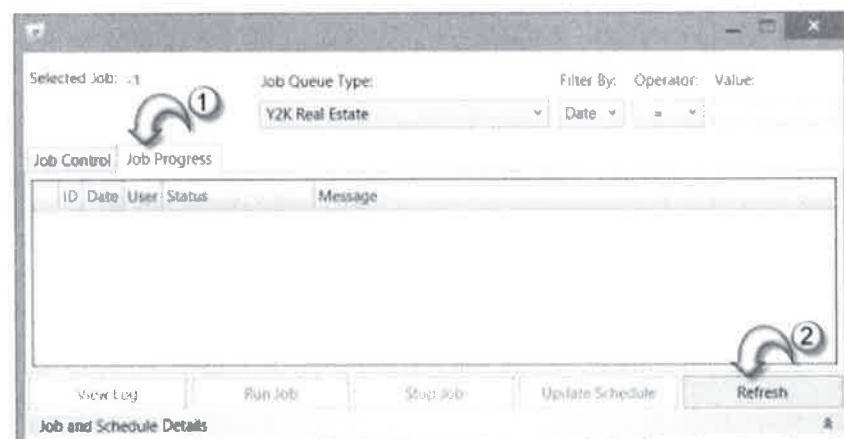
11. The current extract job will appear on the top line of the Job queue.

12. While the extract is running, you may click refresh as often as a status update of the job is desired. **Please remember to keep all other users out of the database while the process continues to run.**
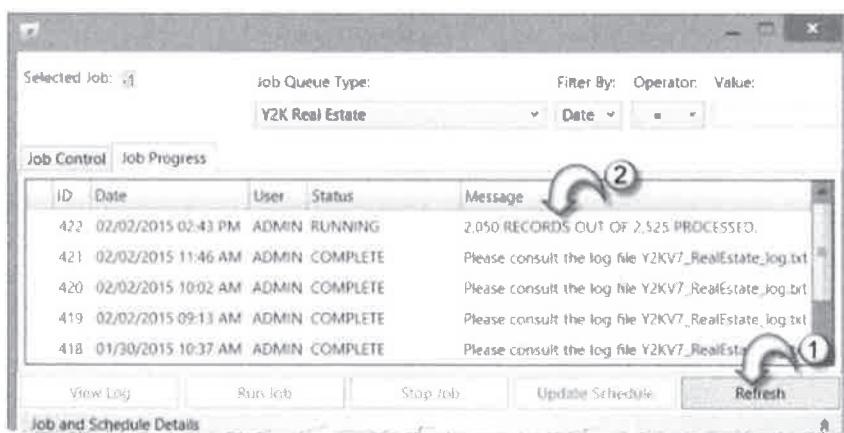
13. When the Y2K Extract has completed, the Job Scheduler will have a **Status** of **Complete** and a message stating **Please consult the log file Y2KV8_RealEstate_log.txt**. At this point other users may log back in to the database without issue.
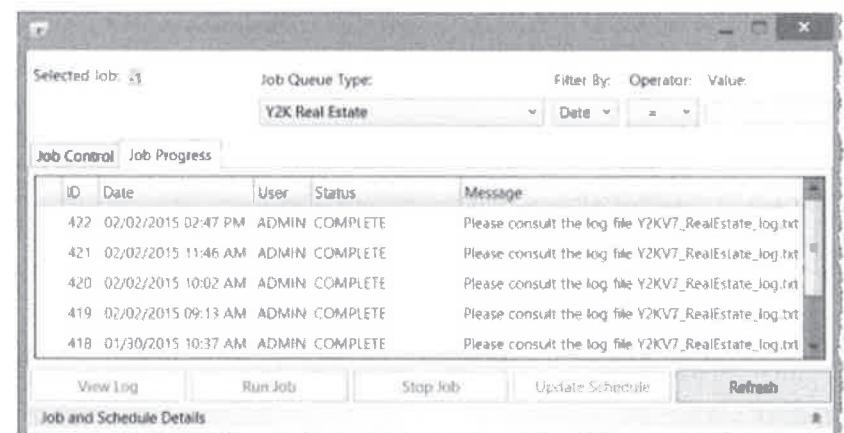
14. To review the error log, navigate to **C:\Vision8\Logfiles**. Open the text document **Y2KV8_RealEstate_log.txt**, confirm the correct number of parcels extracted and that no errors were recorded.
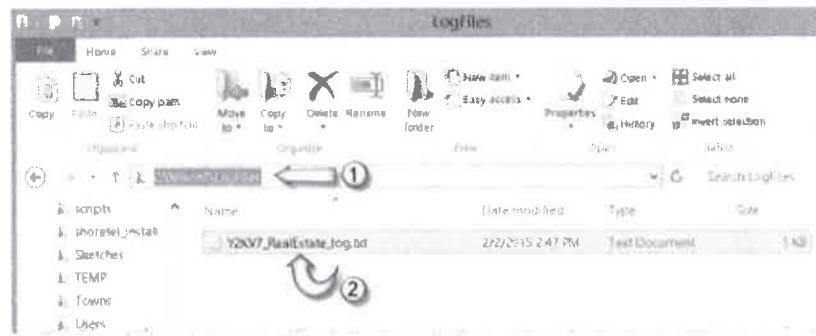
15. Open the text document **Y2KV8_RealEstate_log.txt**, confirm the correct number of parcels extracted and that no errors were recorded.


```
                                              Y2KV7_RealEstate_log.t
File  Edit  Format  View  Help
Export Id:                    1000
Export Name:                  Y2K Real Estate
File Name:                    Y2KV7_RealEstate.txt
File Location:                C:\Vision7
Use Impersonation:            No
Start time:                   02/02/2015 14:29
Progress Table Job ID:        422
Records to Export:            2,525
Sub Export Name:              Owner of Record
Sub Export Name:              Sales History
Sub Export Name:              Exemptions
Sub Export Name:              Other Assessments
Sub Export Name:              ASSESSED VALUES
Sub Export Name:              Current Owner

End time:                     02/02/2015 14:47
Records Exported:             2,525

**********************************************
SUMMARY
The number of records processed is correct.
There were no errors recorded during the extract process.
```

16. The extract file can be located in the base of the **C:\Vision8** folder. **Y2KV8_RealEstate.txt** is the extract file to provide to billing software vendor for import.

17. The **Y2KV8_RealEstate_Layout.txt** file is the data layout format of the Y2K information which also lists the total number of parcels and land/building/total values exported.
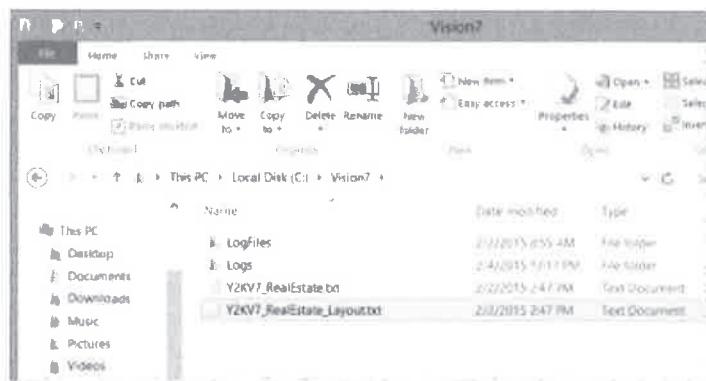
1. Open the text **Y2KV8_RealEstate_Layout.txt**, confirm the correct number of parcels extracted and that the total land, building, and grand total values are as expected.

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Glossary

The Glossary terms are specific to Vision 8 Software only. The definitions in this glossary represent very general representations of the associated terms. Many jurisdiction specific uses may not be covered by the general definitions.

- Abatements
  An Abatement is an amount deducted or subtracted from the assessed value. When a property owner believes that their assessed value is incorrect, they may request an assessment review in an Abatement process. The property owner first completes an Abatement Application requesting a reduction in Parcel Assessment value. When an abatement application is processed the Assessor's office has the option to record specific information regarding the process in Vision. The user should note that the Abatement screen is used to track information only. Any changes in parcel assessment must be modified in the Valuation section of Vision.

- Actual Income
  The Actual Income Section allows users to enter actual income, expense, and sale price data. This data is gathered through a mailing of income and expense forms to all commercial, industrial, and large apartment building owners in the jurisdiction. It is then qualified by an experience commercial appraiser. The purpose of entering the data into this section is to be able to summarize the information by utilizing reports located in the Income Report Section, thus allowing users to gain a complete understanding of the Jurisdiction's rental market. It is very important that the economic accounts have been copied to the current year or added before creating actual accounts.

- Adjustment Value
  The Adjustment Value contains the adjustment factor for the parcel.

- Alternate Land Pricing Screen
  The Alternate Land Pricing screen is available to provide an alternative way of attributing a value to the land on a parcel. Some jurisdictions need to value properties on a Current Land Use Value basis. The Use value is the assessment of the land for a specific purpose and is generally lower than the market value. In Vision the market value is reflected on the Land Information and Classification screen.

- Appraised Value

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Appraised value is the market value of the property. This value consists of an estimate of the value of a property before application of any fractional assessment ratio, partial exemptions, or other adjustments.

- Assessed Value
  Assessed value is the value of the property after fractional assessment ratios, partial exemptions, and any decisions to override the market value of the property have been applied. The assessed values are then provided to formulate the tax policy in a jurisdiction.

- Assessment History
  A record of the assessment values for each year. The Save Assessment Utility needs to be run in order to save the values. Typically a new record is saved after the state certifies the year end values.

- Associated Parcels Screen
  The Associated Parcel screen displays information about each associated parcel. Associated parcels are used to combine two or more parcels that form one economic unit. Typically, these are adjacent or nearby parcels owned by the same owner. One example is a shopping center with an additional parking garage across the street. Rather than value the two parcels separately, users can value them together on the primary parcel and then divide the total value into each parcel. All valuation is done on the land and construction information for the primary parcel and then distributed to any associated parcel(s) based on the percent of legal area they contain.

- Book and Page
  The book and page field is the reference or Deed number as registered in the county Registry of Deeds.

- Building Grade
  Grade is a required entry and should reflect the design quality of the Improvement

- Building Number
  Because there can be numerous buildings on one lot, it is necessary to number the buildings. This building number is also referred to in the land line section.

- Building Permit
  A permit is generally required for new construction, adding on to pre-existing structures, or major renovations. Generally these construction projects must be inspected to ensure compliance with regulations and to maintain accurate property records. The Building Permit screen provides space to record that information.

- Comparable Sales Valuation Approach
  This application uses the Minkowski Similarity metric to determine comparable sales for parcels. This method transforms the measures of absolute difference for diverse variables into directly comparable numbers that can be added together into one metric. Parcels with the lowest scores are selected as comparables.

- Condition Factor
  The condition factor provides the assessor/appraiser with the ability to adjust the land value in such a way that unique land characteristics of a property that affect its value, in a positive or negative manner, can be accounted for.

- Cost Valuation Approach
  The cost approach is based on the principle of substitution. Insofar as a rational informed purchaser would pay no more for a property than the cost of building an acceptable substitute

with like quality. The cost approach seeks to determine the replacement cost new of an improvement minus the depreciation adding the land value.

- Economic Income
The Economic Valuation section is where users may value a parcel using market based values. These fields utilize tables that are built under the Income Tables Section after a careful income, expense, vacancies, and capitalization rate analysis is performed by an appraiser.

- Extra Features
Extra Features are items attached or added to the main structure such as mezzanines, fireplaces, and saunas. Users may need jurisdictional guidelines to distinguish between what is an outbuilding and what is an extra feature. However, extra features are typically attached to the improvement.

- Homestead/Farmstead
The Homestead/Farmstead screen works in accordance with the Pennsylvania "Homestead and Farmstead Property Exclusion" program which may allow a real estate tax reduction. A homestead is defined as a primary residence and a farmstead is defined as a primary residence on a farm, including the value of building and structures used in commercial agricultural production.

- Land Neighborhood
Land neighborhood is for coding of major and sub-neighborhoods within a community. It can take the place of the Site Index or be used in conjunction with the site index.

- Land Use Codes
Each land line must be assigned a land use code. The first land line's code should, but is not required to, reflect the current primary use of the parcel. The Land Use Code chosen will correlate to a Land Class for reporting purposes and for the classification of the parcel as Residential, Commercial, Industrial, Exempt, Open Space or etc. This classification will drive the land price curve based on the parcel's primary use.

- LERTA Exemptions
The Amortization Exemption screen allows the user to define and view a LERTA exemption schedule. LERTA stands for Local Economic Revitalization Tax Assistance Law. Under the LERTA program commercial property owners can receive a prorated ten year tax break on assessed valuation of the improvements to a deteriorated business property from property tax increase if they qualify.

- Location
Information highlighting the nature of a property's location and immediate neighborhood.

- Marshall and Swift Valuation Approach
The Marshall and Swift valuation approach uses the Square-Foot calculation. The Vision application allows users to enter data in to the Marshall and Swift components screens which then sends the data to the Marshall and Swift service (if configured in table maintenance) and receive a value back based on the MVP calculation engine.

- MBLU
The map, block, lot and unit numbers are the primary referencing system that make up the parcel number. It is the means by which the system locates and identifies a specific parcel and locates it on a map. It is essential that these numbers be entered in a consistent and accurate fashion. Vision's system can accept a variety of numbering conventions. Once the numbering

system for your community is established, it must be carefully adhered to. In most cases, this number will already be printed on the property record card.

- Notice History Screen
  The Notice History screen can be used to track correspondences with property owners. One Type of Notice that might be recorded here would be an "Impact Notice." An Impact Notice would be mailed to the property owner indicating the new valuation on the property. Other batch mailings or individual phone calls can also we recorded on this screen.

- Other Assessments
  Other Assessments, also known as Special Assessments or Betterments, are additional assessments added to a parcel. The assessment of betterments is typically a method used to recapture the cost of public improvements, which benefit a limited area, against the real estate situated within that area. An example of another assessment is a public sewer hookup. Although the owners of the real estate parcel are named in the assessment, they are not typically personally liable for payment of the assessment. In Vision this field is used to track the other assessments on the property. This information is not attributed to the total assessed value.

- Outbuildings
  Outbuilding items are typically detached from the main structure such as garages, pools, greens houses, sheds, or fences.

- Override Value
  The Override Value is a dollar value of the override. Overrides can be applied to multiple elements.

- Parcel Address Screen
  This screen contains a grid to create and maintain a list of alternate addresses for a property. The first example is multiple legal mailing addresses for the parcel. When there is more than one building on a parcel that might have separate mailing addresses users can enter those address here. Having the alternate addresses allow for the user to search for other potential addresses to find the subject property.

- Personal Exemptions
  Some jurisdictions may give property tax exemptions to some property owners as defined by state law or local ordinance. An example of a personal exemption might be because the owner is a veteran, surviving spouse, or a senior citizen. Because Exemptions are applied based on the owner of the property users can enable a setting that will notify users that there is an exemption on a parcel when users enter a new owner on that parcel.

- PID
  PID means Parcel Identification Number. This is a unique number automatically generated by the database to identify a particular parcel. It is typically asked for when contacting Customer Support for assistance on a parcel.

- Pin Number
  The PIN stands for Parcel Indentification Number. The PIN number section allows the municipality to store a backup parcel number, or an actual PIN associated with a Geographic Information System.

- Property Note Screen
  The Property Notes screen is a parcel level screen that allows users to track year and category based notes. The notes in this section are limited to 2000 characters to prevent unmanaged database growth. The property notes screen features a table driven type code and column

header sorting. The notes grid will also contain a Date Create column that will track the date the note was originally entered into Vision.

- Qualified/Unqualified Sale
A qualified sale(Q) means it is an arms length sale. An unqualified (U) means that is it not a normal market sale and should not be used in analysis.

- Site Index
The site index can be used to rate land based on any type of characteristic.

- Sketch
The Sketch shows the graphical representation of the building. The different sketched areas of a building are called subareas. Subareas can be part of different sections of a building to account for different depreciation rates of those sections. For example a new addition may have a different depreciation rate than the original structure.

- Street or Road
Type of betterments or improvements associated with the street on which the property is located

- Supplemental Data
The Supplemental Data screen contains user defined labels and data fields established based on the needs of the jurisdiction. These fields are parcel level fields.

- Topography
Information pertaining to the contour and/or the nature of the topographical features of land.

- Utilities
Utilities available that service or have the potential to service the lot.

- Vacant/Improved Sale
At time of whether the property is vacant or improved can be recorded in Vision.

- Value Source
The Value Source field displays the valuation approach chosen from permitted values defined in the Recalculation Settings table.

- Visit History
The visit history allows users to keep track of actual visits to a property, hearing meetings, and valuation reviews. After each visit users can enter notes about who went, what type of visit was intended, what the result of the visit was, and who was spoken with during the visit. The Visit History notes are linked to a building on a parcel. So if users have a shopping complex with 10 buildings and users are only able to visit 3 of them in one day, users can enter individual notes for the separate building visits on that parcel.