



Using the Keyboard

This document will provide the user with keyboard functionality information for Vision 8.

There are three major groups of keys on your keyboard:

- Action Keys
- Number Keys
- Function or F-keys

Scroll down for each group above for a list and explanation.

Action Keys

<Tab>	Alternative to the <Enter> key in many cases -- accepts the current entry and moves the cursor forward to the next entry field.
<Shift> - <Tab>	Moves the cursor backward to the previous entry field.
<Home>	Moves the cursor to the first item in a pick list or the first field in a line.
<End>	Moves the cursor to the last item in a pick list or the last field in a line.
<Pg Up>	Displays the previous page of items in a pick list or scrolling list.
<Pg Dn>	Displays the next page of items in a pick list or scrolling list.
<↑>	Scrolls up a pick list or scrolling list one item at a time. On some screens (e.g., Construction Detail) it can be used to move backward from one field to the next in the same way as the <Shift-Tab> .
<↓>	Scrolls down a pick list or scrolling list one item at a time. On some screens (e.g., Construction Detail) it can be used to move forward from one field to the next in the same way as the <Tab> .
<Delete>	Used to delete the character to the right of the cursor or the contents of a field or line in a table if it is highlighted.
<Back Space>	Used to delete the character to the left of the cursor or the contents of a field if it is highlighted.

- | | |
|-----------------------|---|
| < <=> | Used to move the cursor left within an entry field without erasing characters. |
| < => | Used to move the cursor right within an entry field without erasing characters. |

Numeric Keys

There are two sets of number keys on most keyboards:

- Those located in a row above the letter keys.
- Those in a block to the far right of the keyboard, called a keypad.

You may use either set of number keys in the **Real Estate** program. However, if you choose to use the keypad, be sure that the Number Lock light is on. Press the **<Num Lock>** key to toggle on or off.

Function Keys

The following keys can be used as shortcuts to accomplish their corresponding function

<F1>	Help	Brings up on-line help for the screen or a field.
<F2>	Parcel Selection	Brings up the Select Parcel box to select a new or existing parcel.
<F3>	Next>>	Jumps to the next screen in navigation tree sequence.
<F5>	Print Field Card	Prints the current property card.
<F6>	Pick List	Brings up the pick list for a field if available.
<F7>	Legal Information	Jumps to the Legal Information section.
<F8>	Land Information	Jumps to the Land Lines section.
<F9>	Building Information	Jumps to the Construction and Building Information section.
<F10>	Building Sketch	Jumps to the Building Sketch section.
<F11>	Photo	Jumps to the Photo section.
<F12>	Income System	Jumps to the Income System section.





Using the Mouse

This document will provide the user with mouse functionality information for Vision 8.

Common actions taken with a mouse are:

- | | |
|---------------------|--|
| Click | To press and release the left mouse button once. |
| Double-click | To press and release the left mouse button twice in <i>quick</i> succession. |
| Right-click | To press and release the right mouse button once. |
| Drag | To hold down the left mouse button while moving the mouse. |
| Select | To highlight or mark text in an entry field or choose an option by clicking the item field in anticipation of taking some action (like changing, erasing, etc.). |
| De-select | To un-mark or un-highlight text by selecting another item or clicking away from the selected item. |
| Scroll | To use the middle scroll button on the mouse to move an on-screen scroll bar upwards and downwards. |



Using Pick Lists

This document will walk the user through using Pick Lists in Vision 8. Many data entry fields are equipped with a "pick list" where you can choose a value from a list of values permitted for that field. These pick list values are generally defined in the Admin Module.

Click on any **Property Factors Utilities** box to see a pick list drop down menu example.

A screenshot of the 'Property Factors Utilities' form in Vision 8. The form contains several dropdown menus for selecting values. On the left, there are three 'Utilities' dropdowns: the first is set to '01: Public Water', the second to '02: Public Sewer', and the third is open, showing a list of options including '00: N/A', '01: Public Water', '02: Public Sewer', '03: Well', '04: Septic', and '05: Public Water And Sewer'. Other dropdowns include 'Street' (set to '01: Paved Road'), 'Road Plan' (set to '01: Flood Plan'), 'Topo' (set to '01: Hilly'), 'Soil Type' (set to '00: N/A'), 'Location' (set to '03: Avg'), 'Sub Related' (set to 'A'), 'Gas Region' (set to 'Pocket Nbrd'), 'Frontage' (set to '0'), 'Depth' (set to '0'), 'Gis Area' (set to '0'), 'Sec Frontage' (set to '0'), 'Perimeter' (set to '0'), and 'Gis Perimeter' (set to '0').

To select an item from a pick list following the steps provided below:

1. Display a pick list by clicking the drop down arrow on one of the fields or by pressing the <F6> key when the cursor is located in the field.
2. Find the code that contains the information you would like to populate the field with. If necessary, scroll through the list using the up and down arrow keys, the scroll bar or the <Pg Up> and <Pg Dn> keys.
3. Click the corresponding item to highlight it. An item must be highlighted for the field to populate.
4. Single left-click the item to close the box and populate the value in the selected field.





How to Select Data and Make Changes

This document will walk the user through standard processes for entering & editing data in Vision 8.

Common Selection Options

Choosing a specific field on a screen indicates to the system that you would like edit that field. The current information becomes highlighted when you choose the field. If there is no data currently in the field, only the cursor will show in the field.

To select a field:

1. Repeatedly press the **<Enter>** or **<Tab>** key until the cursor lands on the desired field.
2. Use the mouse to select the desired field by using **left-click**.

Select an entire line in a list or table:

1. Scroll up and down in a list by using the **Up** and **Down** arrow keys, **<PgUp>** and **<PgDn>** keys, or the scroll bars on the screen if they are provided.
2. Use the mouse to click the **grayed** arrow on the left of the desired line. The line will highlight and the arrow will turn black, as in the example below.

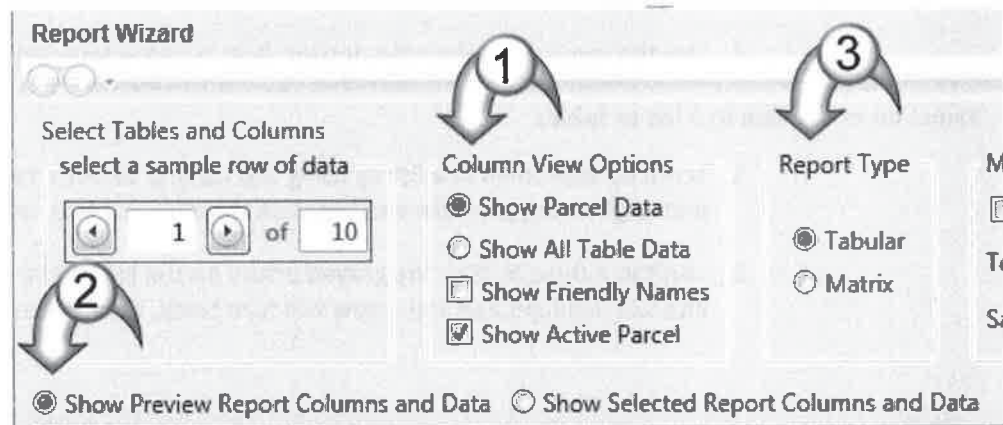
Code	Description	Res	Contd	Contd Unit	Condo Main	Vacant	Min Stories	Max Stories	Size Adj	Std Size	Max Adj	Wall High	Wall Adj
01	Apartments	YES	YES	NO	NO	NO	0	999	NSZ				
02	Automotive Service	YES	YES	NO	NO	NO	0	999	NSZ				
03	Bank	NO	YES	NO	NO	NO	0	999	NSZ				
04	Bi-Level	YES	NO	NO	NO	NO	0	999	NSZ				
05	Church	YES	YES	NO	NO	NO	0	999	NSZ				
06	Commercial	NO	YES	NO	NO	NO	0	999	NSZ				
07	Condo	YES	NO	YES	NO	NO	0	999	NSZ				
08	Cottage	YES	YES	NO	NO	NO	0	999	NSZ				
09	Duplex	YES	NO	NO	NO	NO	0	999	NSZ				
10	SF Dwelling	YES	NO	NO	NO	NO	0	999	NSZ				

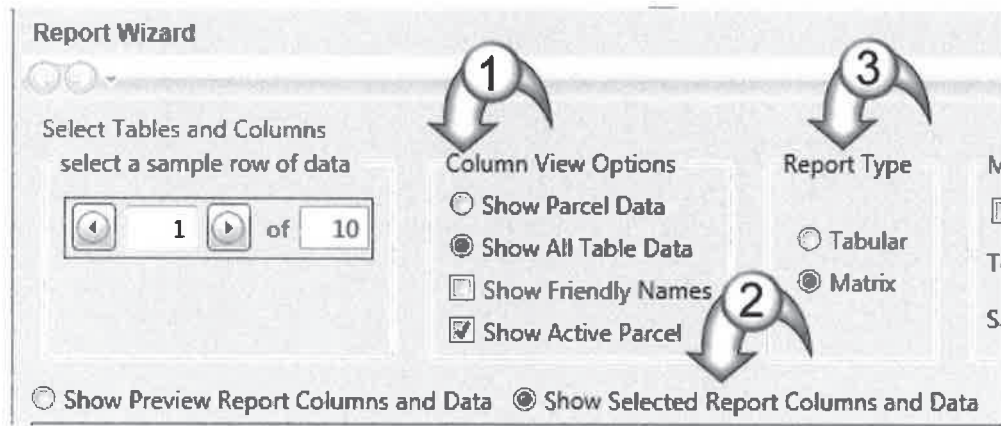
To place/remove a mark in a checkbox:

1. Repeatedly press the **<Enter>** or **<Tab>** key until the cursor moves to and highlights the desired check box.
2. Once you are on the checkbox, press the **<Spacebar>** to check the box. Press it again to clear the check mark.
3. Alternatively, use the mouse to click the desired box by using **left-click**. Click it again to clear the check mark.

To select a "radio button" option:

- Only **one** "radio button" can be selected at any one time.
- **Clicking** a radio button turns it **on**.
- **Clicking a different** button turns the **new one on** and the **first one off** automatically.
- In the example below, the Column View Option can either be Show Parcel Data OR Show all Table Data, the Show Preview Report Columns and Data OR Show Selected Report Columns and Data can be selected, and the Report Type may only be Tabular OR Matrix.



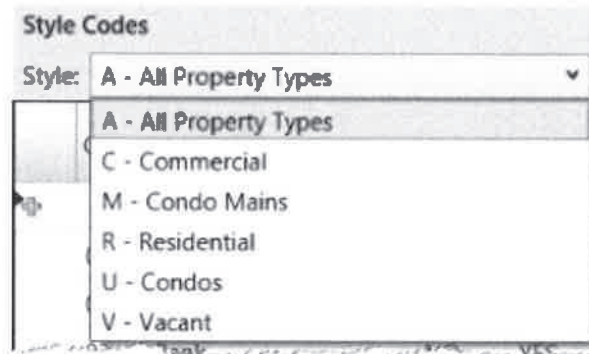


Drop-Down List:

Only **one** item in a **drop-down** list can be selected. When the drop-down list is **inactive** only a **single value** item will appear. When activated, it displays a drop-down list of values for a user to select from.

You can navigate to find their desired selection within a drop-down list by:

- Using a **scrollbar**
- Pressing the keyboard navigation keys (**up-arrow**, **down-arrow**, **<PgUp>** and **<PgDn>**)
- Entering at least **one character** from the **keyboard** - in the case of a lengthy but ordered list, this strategy can propel one to the general section of entries beginning with the selected character.



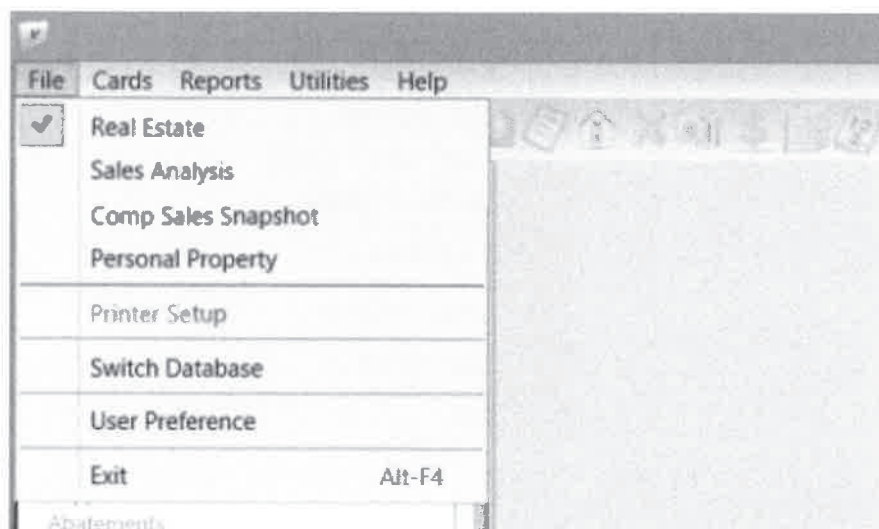
VISION

GOVERNMENT SOLUTIONS

File Menu

This document will walk the user through the options under the File menu heading of Vision 8.

Clicking the **File** menu heading will open the options available within.



The first four options under the File menu give you access to Visions **modes of operation**. These options are as follows:

Real Estate - This is the default operating mode when you click the Appraisal Vision icon on your desktop. In this mode you view, create and maintain the master Real Estate database (parcel information) and the master Real Estate tables. If you display the File menu after logging on, you see a check next to this Real Estate option.

✓	Real Estate	
	Sales Analysis	
	Comp Sales Snapshot	
	Personal Property	
	Printer Setup	
	Switch Database	
	User Preference	
	Exit	Alt-F4

Sales Analysis - In this operating mode the system uses the Sales Analysis database – an extract or subset copy of the master Real Estate database. You use this database and the sales options on the Reports menu to complete assess/sales-ratio analysis. Selecting this option displays the Select Parcel dialog box. If you display the Sales Analysis menu after choosing this mode on, you see a check next to this Sales Analysis option.

	Real Estate	
✓	Sales Analysis	
	Comp Sales Snapshot	
	Personal Property	
	Printer Setup	
	Switch Database	
	User Preference	
	Exit	Alt-F4

Comp Sales Snapshot - In this mode the system stores complete parcel information at the time of each sale from the Master Real Estate File or those sale files at the time of extraction. If you display the Comp Sales Snapshot menu option after choosing this mode on, you see a check next to this Comp Sales Snapshot option.

	Real Estate	
	Sales Analysis	
✓	Comp Sales Snapshot	
	Personal Property	
	Printer Setup	
	Switch Database	
	User Preference	
	Exit	Alt-F4

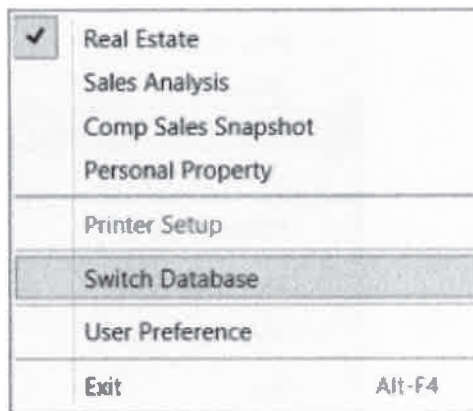
Personal Property - In this operating mode the system provides access to Personal Property accounts. You can view and maintain all items of taxable Personal Property. Selecting this option displays the Select Personal Property Account dialog box. If you display the Personal Property menu after choosing this mode on, you see a check next to this Personal Property option.

	Real Estate	
	Sales Analysis	
	Comp Sales Snapshot	
✓	Personal Property	
	Printer Setup	
	Switch Database	
	User Preference	
	Exit	Alt-F4

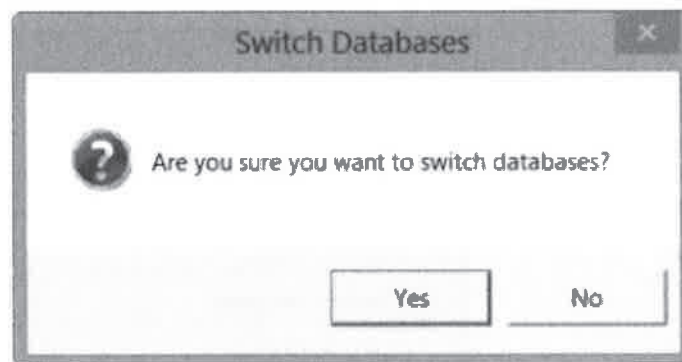
Other File menu items include:

Printer Setup – This option is carried over from previous versions where it was used to displays the Choose Vision Printer dialog box where you can select a printer as the Vision default or one to be used for the current session. In Vision 8 you can now use window's printer setup options.

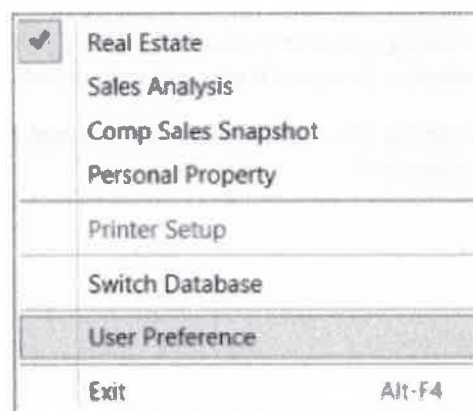
Switch Database – Choosing this menu option will prompt you with a pop-up asking "Are you sure you want to switch databases?"

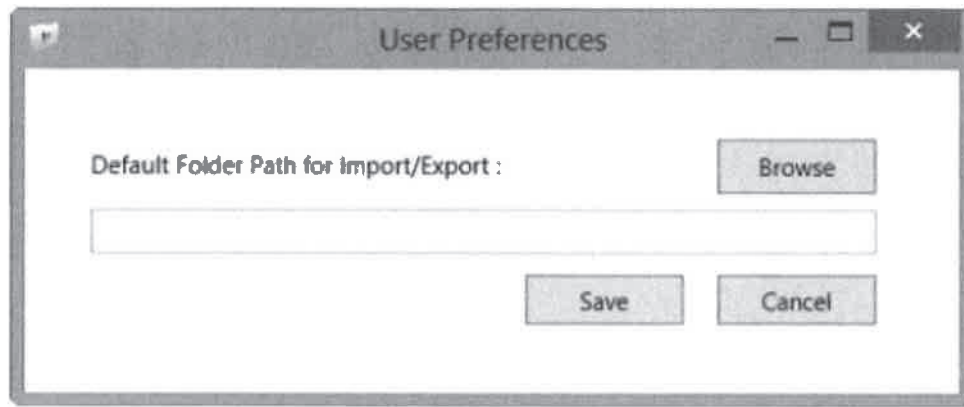


Choosing the 'Yes' option will close all open dialog boxes and display the **User Login** dialog box where you can select a different database.

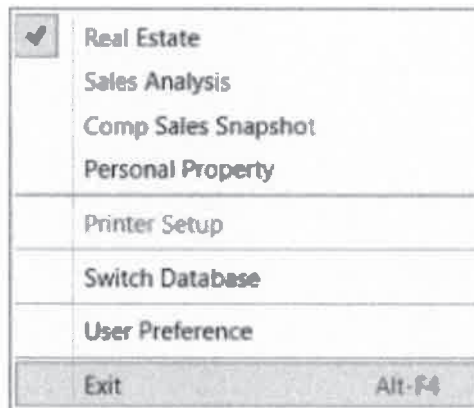


User Preference – Choosing this menu option will open the User Preferences dialog box where you can change your Default Folder Path for Import/Export option.





Exit - Exit the system. You can also exit the system by clicking the X-box in the upper right corner of the window or by the F4 key while holding down the Alt key on your keyboard.



© 2019 Vision Government Solutions Inc. All Rights Reserved.
 1 Cabot Rd. Hudson, MA 01749 (800) 628-1013 www.vgsi.com
Equal Opportunity Employer/Affirmative Action Employer



Cards Menu

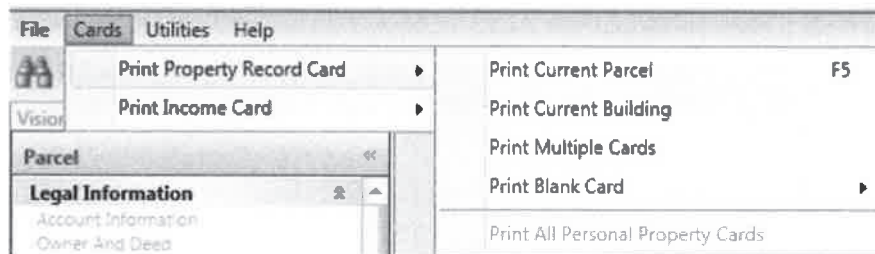
This document will walk the user through the options under the Cards menu heading of Vision 8.

Clicking the **Cards** menu heading will open the options available within.



Card menu items include:

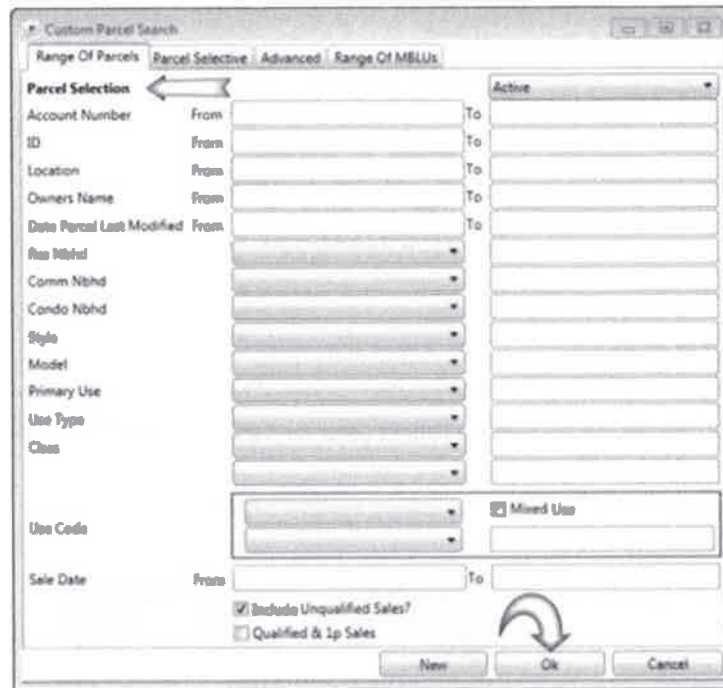
Print Property Record Card – Choosing this menu option will open a sub-menu of the following sub-options.



Print Current Parcel – Prints a **Property Record Card** for the active parcel.

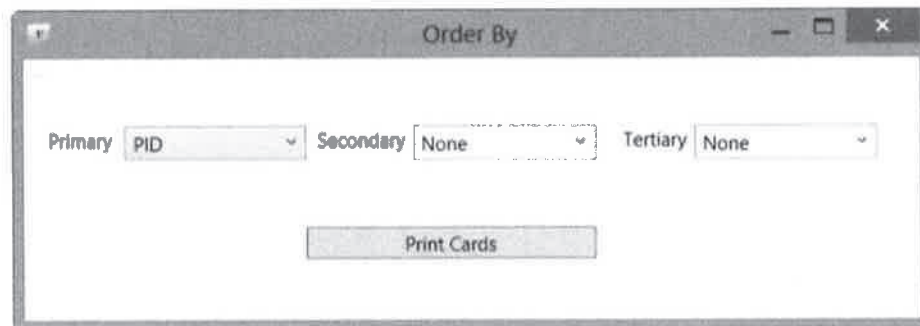
Print Current Building – Prints a **Property Record Card** for the current building on the active parcel.

Print Multiple Cards – Displays the **Custom Parcel Search** dialog box.



The 'Custom Parcel Search' dialog box features four tabs: 'Range Of Parcels', 'Parcel Selective', 'Advanced', and 'Range Of MELLUs'. The 'Parcel Selective' tab is active, showing a list of search criteria on the left and corresponding input fields on the right. The criteria include Account Number, ID, Location, Owners Name, Date Parcel Last Modified, Ass Nbrhd, Comm Nbrhd, Condo Nbrhd, Style, Model, Primary Use, Use Type, and Class. Each criterion has a 'From' and 'To' field. Below these fields are checkboxes for 'Include Unqualified Sales?' and 'Qualified & 1p Sales'. At the bottom, there are 'New', 'Ok', and 'Cancel' buttons. A curved arrow points from the 'Ok' button to the 'Order By' dialog box.

After choosing your criteria in this box, choosing the **Ok** button will open the **Order By** dialog box. This box allows the user to choose the order in which the cards will print according to a **Primary**, **Secondary** and **Tertiary** option.



The 'Order By' dialog box has a title bar with standard window controls. It contains three dropdown menus labeled 'Primary', 'Secondary', and 'Tertiary'. The 'Primary' dropdown is set to 'PID', 'Secondary' is set to 'None', and 'Tertiary' is set to 'None'. Below these dropdowns is a 'Print Cards' button.

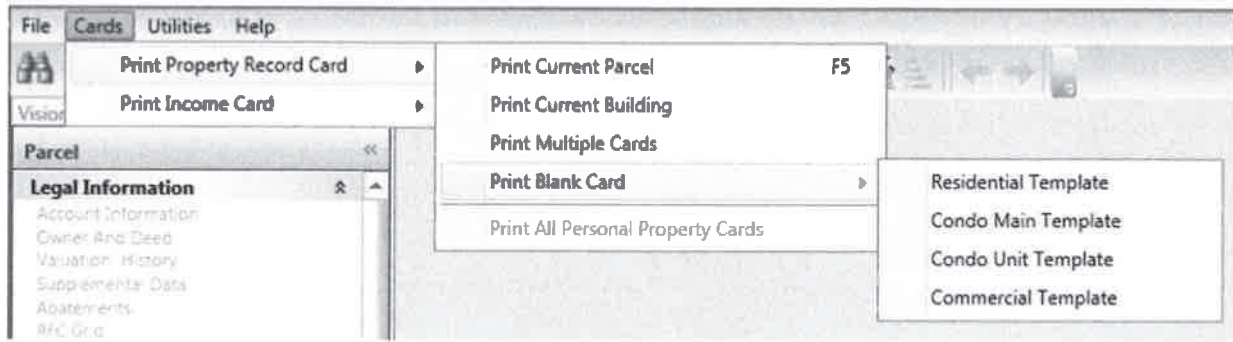
Print Blank Card – Prints a blank card which is called a “template”. Choosing this menu option will open a sub-menu of the following sub-options.

Residential Template – Prints a blank **Residential** parcel template.

Condo Main Template – Prints a blank **Condo Main** parcel template.

Condo Unit Template – Prints a blank **Condo Unit** parcel template.

Commercial Template - Prints a blank **Commercial** parcel template.



Print All Personal Property Cards – Choosing this option will print all **Personal Property** cards. You must be in **Personal Property Mode** to use this option.

Print Income Year – This will allow you to select what **Income Year** you want to print the income card from.

Print Income Card – This option will allow you to print the Income Card from the year you selected.



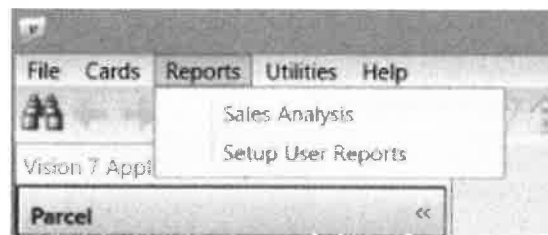
© 2019 Vision Government Solutions Inc. All Rights Reserved.
 1 Cabot Rd. Hudson, MA 01749 (800) 628-1013 www.vgsi.com
Equal Opportunity Employer/Affirmative Action Employer



Reports Menu

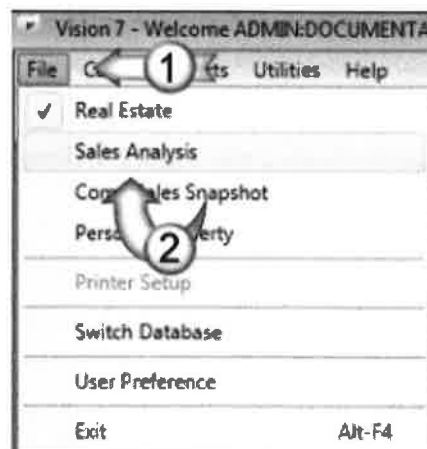
This document will walk the user through the options under the Reports menu heading of Vision 8.

Clicking the **Reports** menu heading will open the options available within.

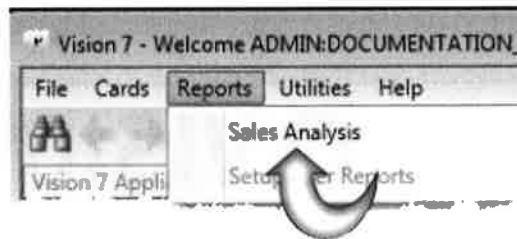


Sales Analysis – This menu item is available only when you are using the Sales Analysis or Comp Sales Snapshots mode of operation (selected on the File menu). It is grayed out when you're using the master Real Estate database (default Real Estate mode).

1. Choose the **Sales Analysis** database from the **File Menu**. This option will open the **Sales Analysis** dialog box.



2. Select **Reports** at the top of the screen. Click on **Sales Analysis Reports**.



3. Select the criteria to narrow down your sales analysis. In this example, any parcel with Model Code 01 and a Sale Date from 01/01/2011 through 12/31/2012. Click **Next**.

Custom Parcel Search

Range Of Parcels | Parcel Selection | Advanced | Range Of MBLUs

Parcel Selection

Account Number From To

MIN1 From To

Location From To

Owners Name From To

Date Parcel Last Modified From To

Rse Nblnd

Comm Nblnd

Condo Nblnd

Style

Model 1 01: Residential 01

Primary Use

Use Type

Class

Use Code 2

3

Sale Date From 1/1/2011 To 12/31/2012

☒ Include Unqualified Sales?

☒ Qualified & Zip Sales

New Ok Cancel

4. On the **Extract Options** page, adjust your settings as required. In this example we are selecting **Create a New Extract**. Click **Next**.

Sales Analysis

Extract File Options Page

☐ Open Existing Extract
☒ Create New Extract **1**

☐ Use trended price
☐ Use proposed values

Land Residual Ratio Range

From: 0.9 To: 1.1

Assessment history save number 0

Current Value

Current values save number 0

< Back **Next >** Cancel Analyze

2

5. On the **Groups Specifications Page**, choose the data groupings by clicking on each tab, then click **Next**.

Sales Analysis

Groups Specifications Page

Lot Size Groups **1** **Groups** Year Built Groups

Unit Type	Units Low	Units High
AC	0	0.1
AC	0.1	0.25
AC	0.25	0.33
AC	0.33	0.5
AC	0.5	1
AC	1	3
AC	3	5
AC	5	10
AC	10	9,999

< Back **Next >** Cancel Finish

2

6. The **Extract Review** page will now appear. Review the data and choose which report(s) to print.

Sales Analysis

Extract Review Page

Group Summary **Record Detail** Land Residual

Primary grouping: **Style** Secondary grouping: **None**

Print Options:
☒ Print Group Summary
☒ Print Record Detail **Print** **Show Preview**
☒ Print Land Residual

group by area Drag a field here to group by that field

Style	Count	Mean Sale Price	Mean Appraised	Mean A/S Ratio	Median Sale Price	Median Appraised	Me
04	6	\$41,884.33	\$154,566.67	2.22	\$11,500.00	\$148,500.00	
10	51	\$46,468.31	\$208,021.57	0.85	\$0.00	\$175,100.00	
17	1	\$0.00	\$128,800.00	0	\$0.00	\$128,800.00	
18	16	\$43,687.50	\$133,937.50	0.61	\$0.00	\$124,000.00	

< Back Next > Cancel Finish



1. Prior to printing a report, it can be previewed by selecting the **Show Preview** button.



2. While the system generates the preview, a **status** message will appear:

Preview generation progress

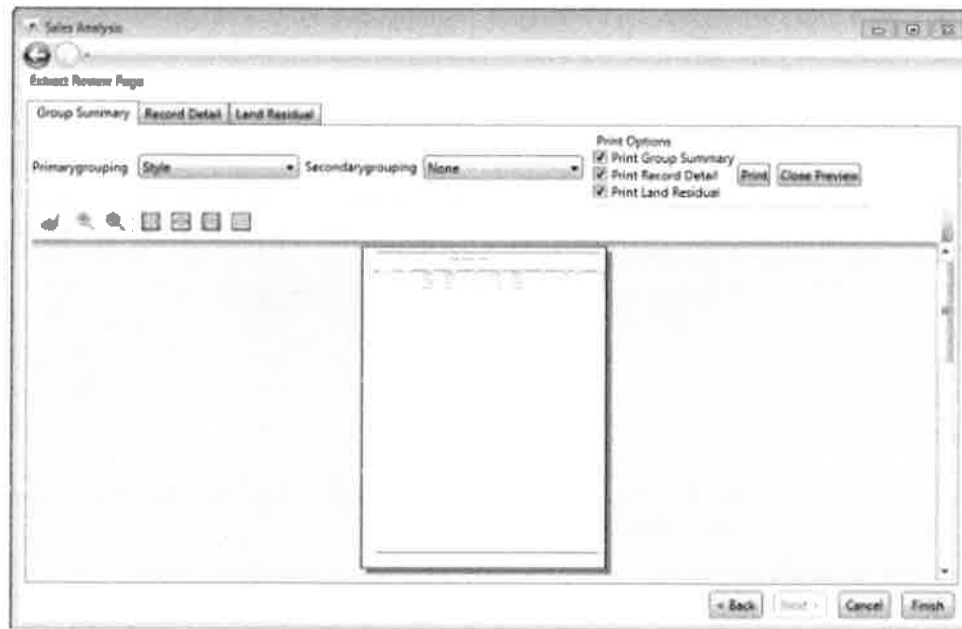
Generating preview page 1

Progress bar (partially filled)

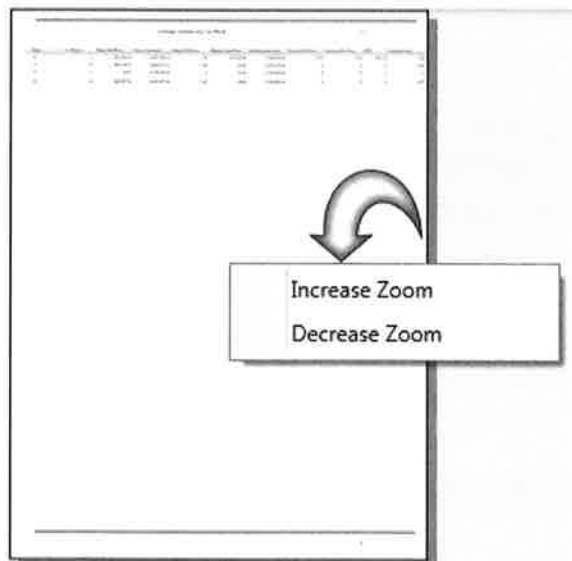
Cancel



Once complete, the preview will appear in the review section of the screen:



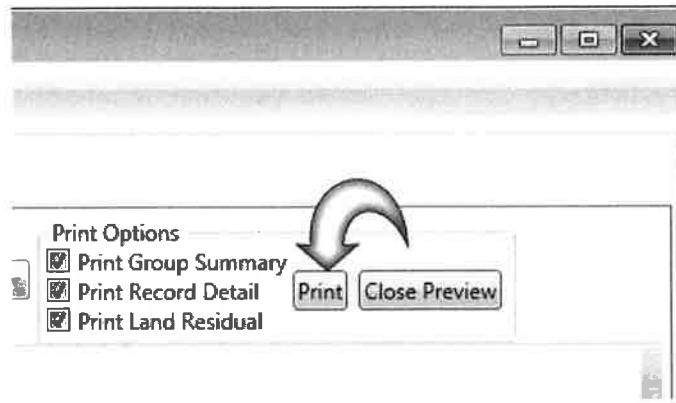
2. Increase the size of the page by **right-clicking** on the document and selecting **Increase Zoom**



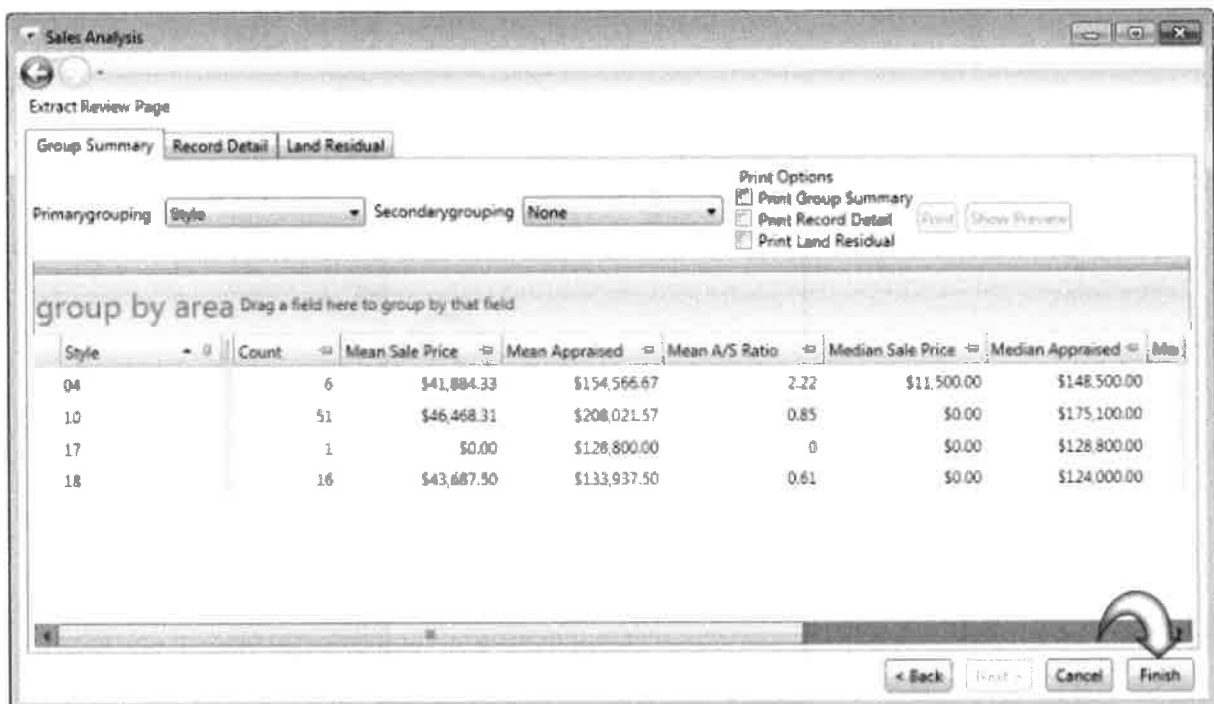
3. Close the preview by selecting the **Close Preview** button:



3. To print the document, click the **Print** button.



4. Clicking the **Finish** button will close the Report Review screen and return the user to the **Sales Analysis** page.



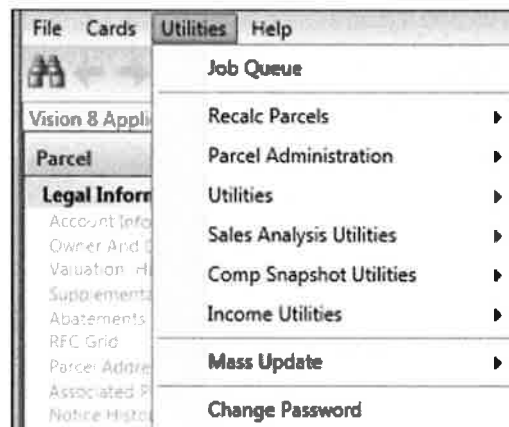
Setup User Reports – This option is carried over from the previous version and displayed the Available Reports dialog box where you could add or delete the User Reports available in the Report section. To set up user reports please see Vision 8's Admin Module.



Utilities Menu

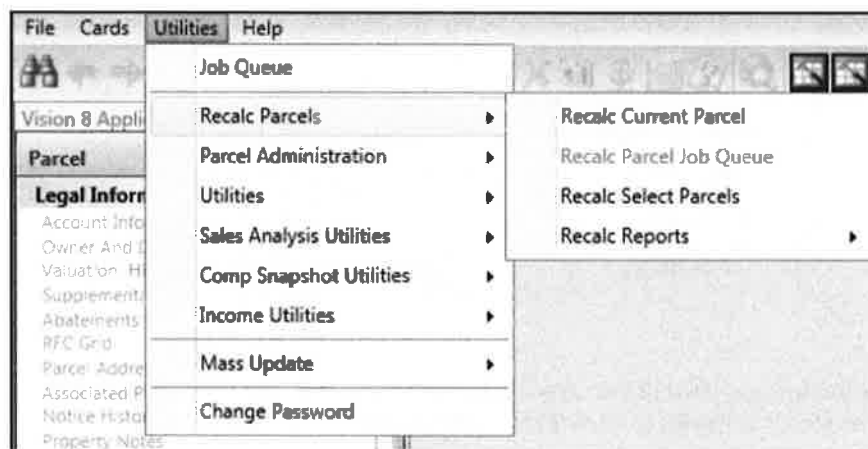
This document will walk the user through the options available under the Utilities menu heading of Vision 8.

Clicking the Utilities menu heading will open the options available within.



Job Queue – This option displays the **Process Job Queue** for items like but not limited to Recalculation, Sales Analysis Extract, and Comp Sales Extract.

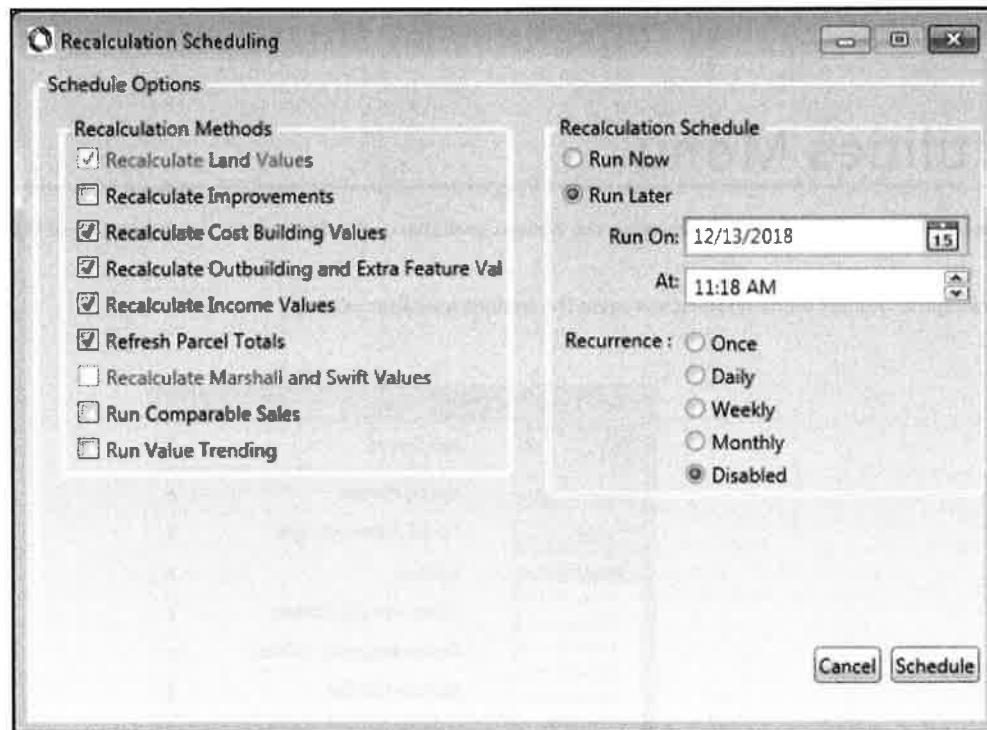
Recalc Parcels – Choosing this menu option will open a sub-menu of the following sub-options. The sub-option all relate to utilities you can complete related to recalculation of parcels.



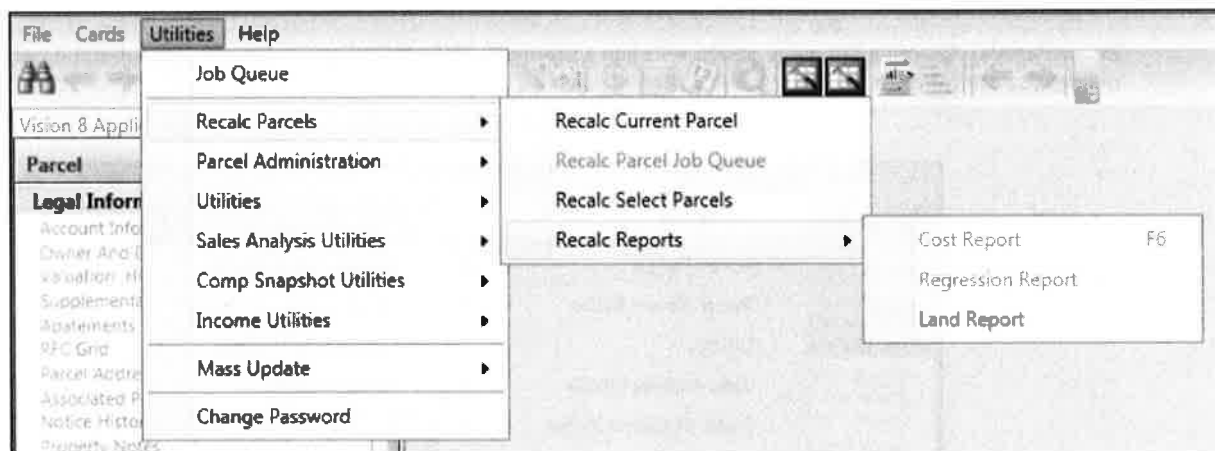
Recalc Current Parcel – Recalculates the current parcel displayed. The recalculation values are based on recalculation settings for that parcel.

Recalc Parcel Job Queue – Select this menu option to display the Recalculation Job Queue dialog box.

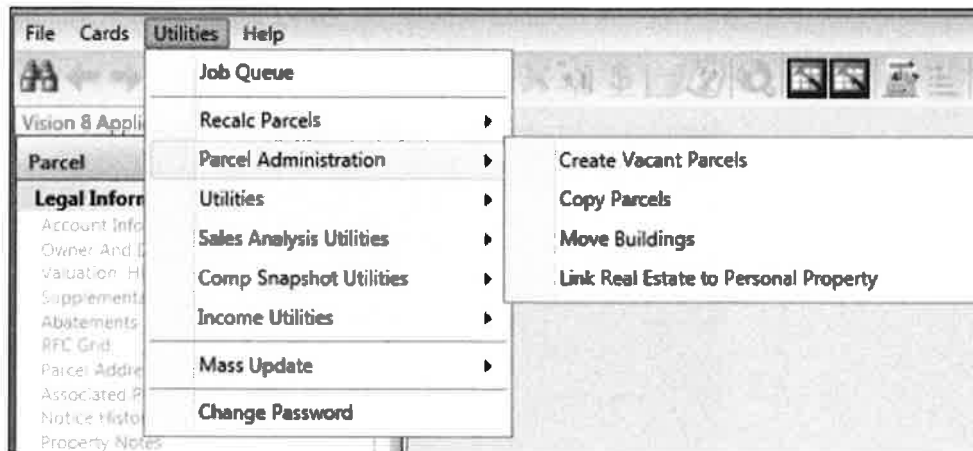
Recalc Select Parcels – Select this menu option to display the Recalculation Scheduling dialog box.



Recalc Reports - Use this option to view or print one of three text files which shows how a parcels value is arrived at. These three reports are Cost Report, Regression Report and Land Report.



Parcel Administration – Choosing this menu option will open a sub-menu of the following sub-options. These sub-options are utilities specific to moving or creating parcel related data.

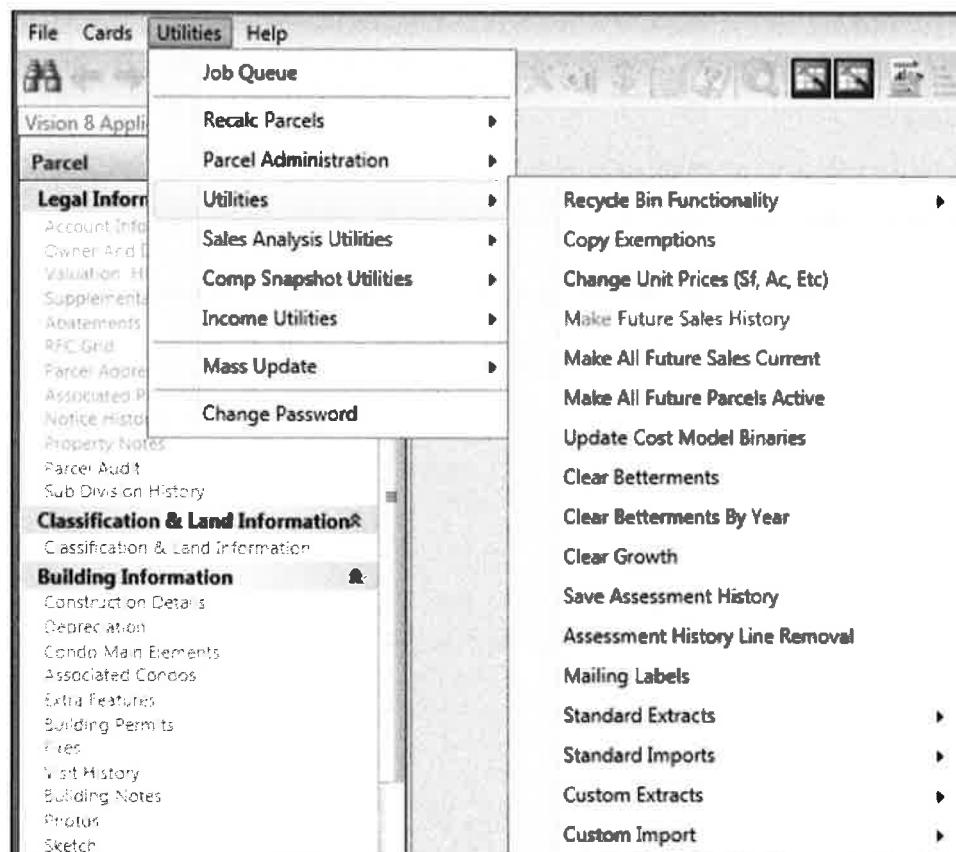


Create Vacant Parcels – Selecting this option will open the Create New Vacant Parcels window. Please see the document **How to Create a Vacant Parcel** for additional information.

Copy Parcels – Selecting this option will open the Copy Parcel window. Please see the document **How to Copy a Parcel** for additional information.

Move Buildings – Selecting this option will open the Move Buildings window.

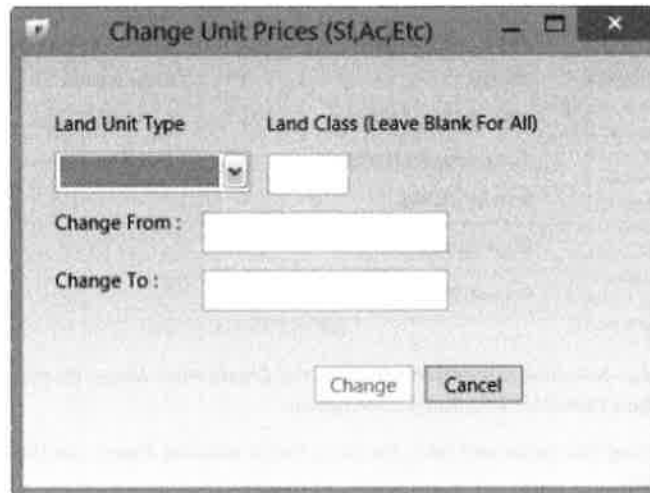
Utilities - Choosing this menu option will open a sub-menu of the following sub-options. These sub-options contain a diverse set of utilities and functions in order to modify, import, or extract data in and/or from Vision.



Recycle Bin Functionality – Selecting this option will allow you to choose between the sub-options of View Building Recycle Bin or Empty Building Recycle Bin.

Copy Exemptions – Selecting this option will copy exemptions from the current year.

Change Unit Prices (Sf, Ac, Etc) – Selecting this option will open the Change Unit Prices (Sf, Ac, Etc) dialog box. This dialog box is the first step in updating the prices for land unit types.

A screenshot of a software dialog box titled "Change Unit Prices (Sf,Ac,Etc)". The dialog box has a standard Windows-style title bar with minimize, maximize, and close buttons. Inside, there are two labels: "Land Unit Type" and "Land Class (Leave Blank For All)". Below "Land Unit Type" is a dropdown menu with a small arrow icon. Below "Land Class" is an empty text box. Further down, there are two more text boxes labeled "Change From :" and "Change To :". At the bottom right of the dialog box are two buttons: "Change" and "Cancel".

Make All Future Sales Current – This process will find any sales marked as "F" for Future and mark them as "C" for Current. These owners will become the Current Owner for the parcel. Typically, this is done when the billing extract has been completed.

Make All Future Parcels Active – Parcels can have a status of Active, Inactive, or Future. This process will find all Parcels marked as "F" for Future and mark them as "A" for Active. Typically, this is done when the billing extract has been completed.

Clear Betterments – This option allows you to delete all the Betterments found on the Exemptions screen.

Clear Betterments By Year – This option allows you to delete all the Betterments found on the Exemptions screen by fiscal year.

Mailing Labels – This option opens the Mailing Labels dialog box allowing you to set criteria by which to create Mailing Labels.

Mailing Labels

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

New Ok Cancel

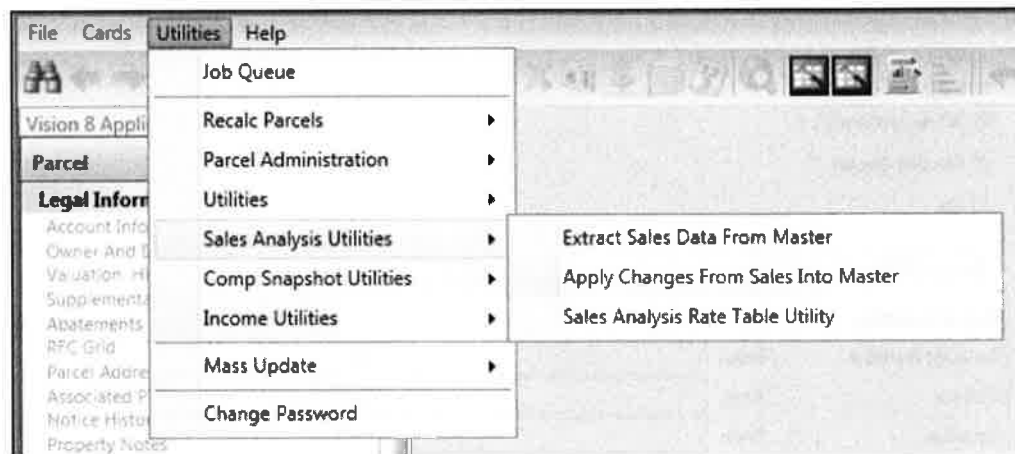
Standard Extracts - This option allows you to choose from a list of standardized, common Extracts.

Standard Imports – This option allows you to choose from a list of standardized, common Imports.

Custom Extracts – This option allows you to choose from a list of customized Extracts.

Custom Import – This option allows you to choose from a list of customized Imports.

Sales Analysis Utilities - Choosing this menu option will open a sub-menu of the following sub-options related to the extract and copying of data to or from the Sales Analysis database.

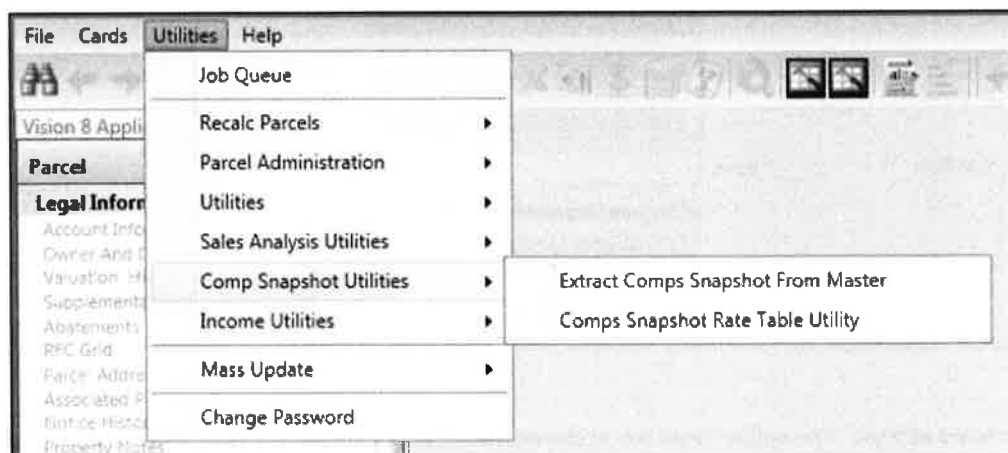


Extract Sales Data From Master – This option will allow you to copy Sales Data from the Master Database into the Sales Analysis Database.

Apply Changes From Sales Into Master – This option will allow you to apply changes made in the Sales Analysis Database into the Real Estate Database. *Prior to using this utility you should contact Customer Support to ensure a valid back up file has been created successfully.*

Sales Analysis Rate Table Utility – Use this utility to copy tables between the Master database and the Sales database. This will copy over the current valuation tables with the ones that you are copying.

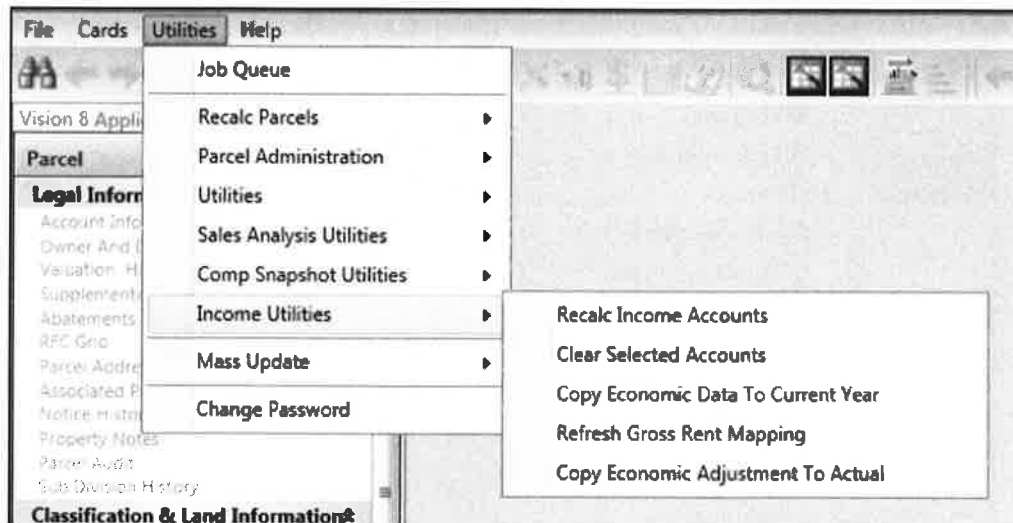
Comp Snapshot Utilities - Choosing this menu option will open a sub-menu of the following sub-options related to the extract and copying of data to or from the Comp Sales database.



Extract Comps Snapshot From Master – This option will allow you to copy Comps Snapshot Data from the Master Database into the Comps Snapshot Database.

Comps Snapshot Rate Table Utility – Use this utility to copy tables between the Master Database and the Sales Database. This will copy over the current valuation tables with the ones that you are copying.

Income Utilities - Choosing this menu option will open a sub-menu of the following sub-options related to recalculating, modifying and copying income data.



Recalc Income Accounts – This utility will allow you to recalculate all your Income Accounts.

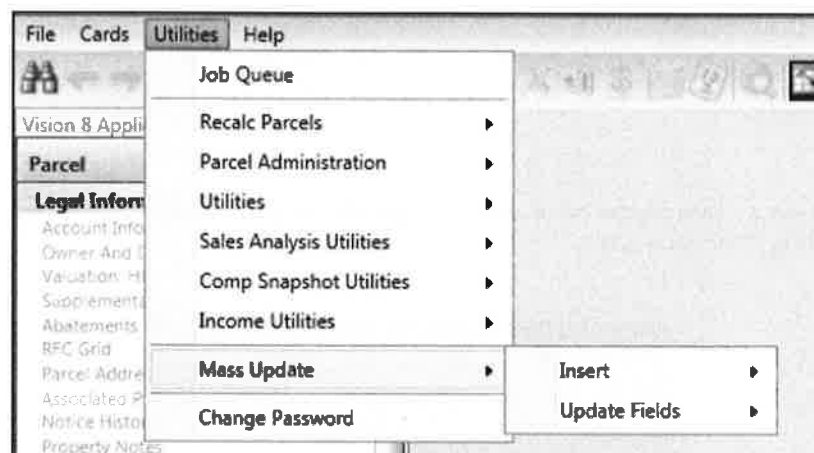
Clear Selected Accounts – This utility clears the selected Actual Income Accounts and Economic Income Accounts on a mass scale. You can select to only clear this years Selected Accounts or all Selected accounts.

Copy Economic Data To Current Year – This utility will allow you to copy your Economic Data to your current fiscal year.

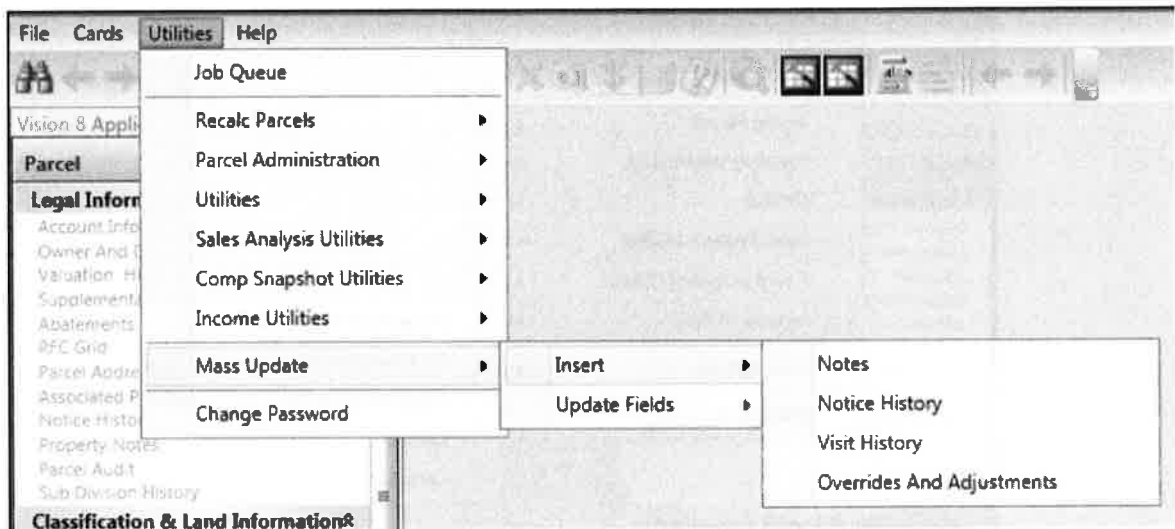
Refresh Gross Rent Mapping – Use this utility after you have added additional Building Styles to the Styles Codes table that do not appear in the Gross Rent Mapping table. After running this utility, these new codes will then show up in the Gross Rent Mapping Table.

Copy Economic Adjustment To Actual – This utility will allow you to copy your Economic Adjustments to your Actual Accounts.

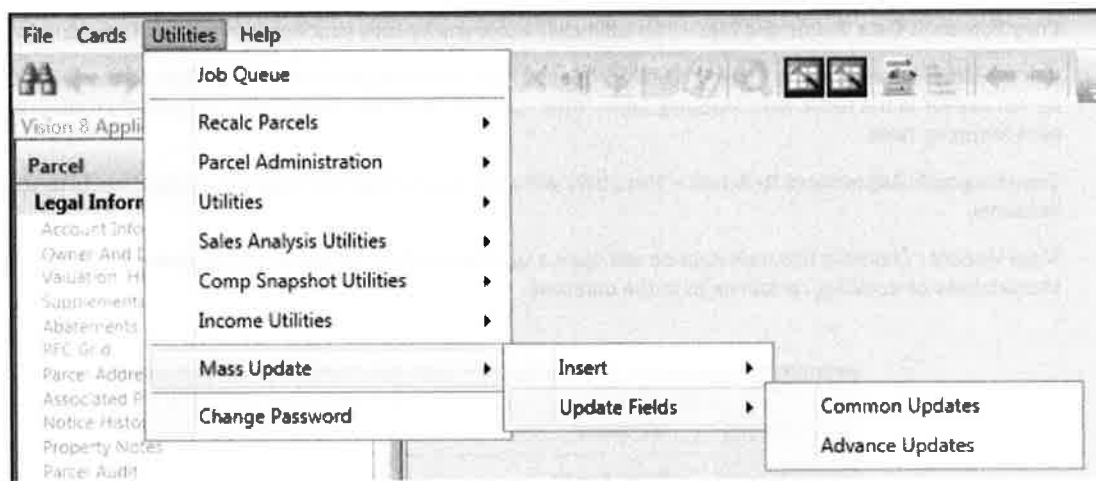
Mass Update - Choosing this menu option will open a sub-menu of the following sub-options related to inserting data into the database or updating certain fields in the database.



Insert – This option will allow you to mass update Notes, Notice History, Visit History and Overrides, and Adjustments by opening the Mass Update dialog box.



Update Fields – This option allows you to perform Common Updates or Advanced Updates by opening the Mass Update dialog box.



Change Password – Choosing this menu option will open the Change Password dialog box, which allows the currently logged in user to change their password.

 A screenshot of a 'Change Password' dialog box. The dialog has a title bar with the text 'Change Password' and a close button (X). Inside, there are three text input fields labeled 'Old Password', 'New Password', and 'Confirm Password'. At the bottom of the dialog, there are two buttons: 'Change' and 'Cancel'.



Standard Building Permit Import Utility

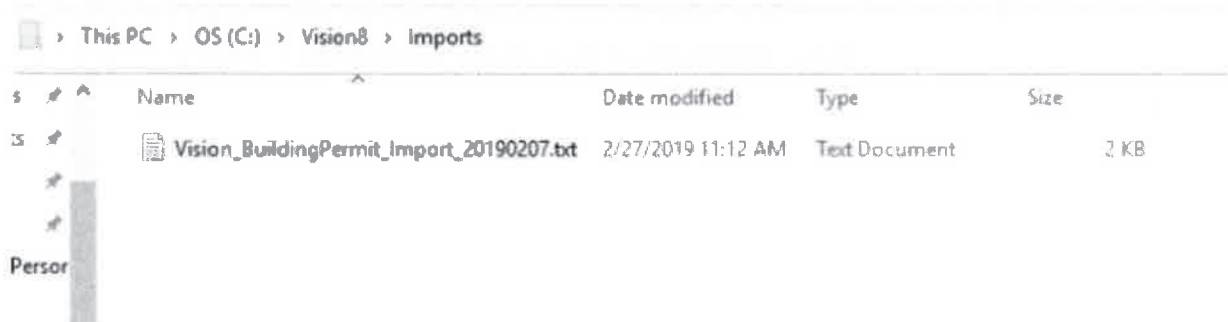
The purpose of this document is to assist the user in running the Vision Standard Building Permit Import. This Utility allows the user to import building permit records exported in the required format from an external data source into the Vision CAMA system.



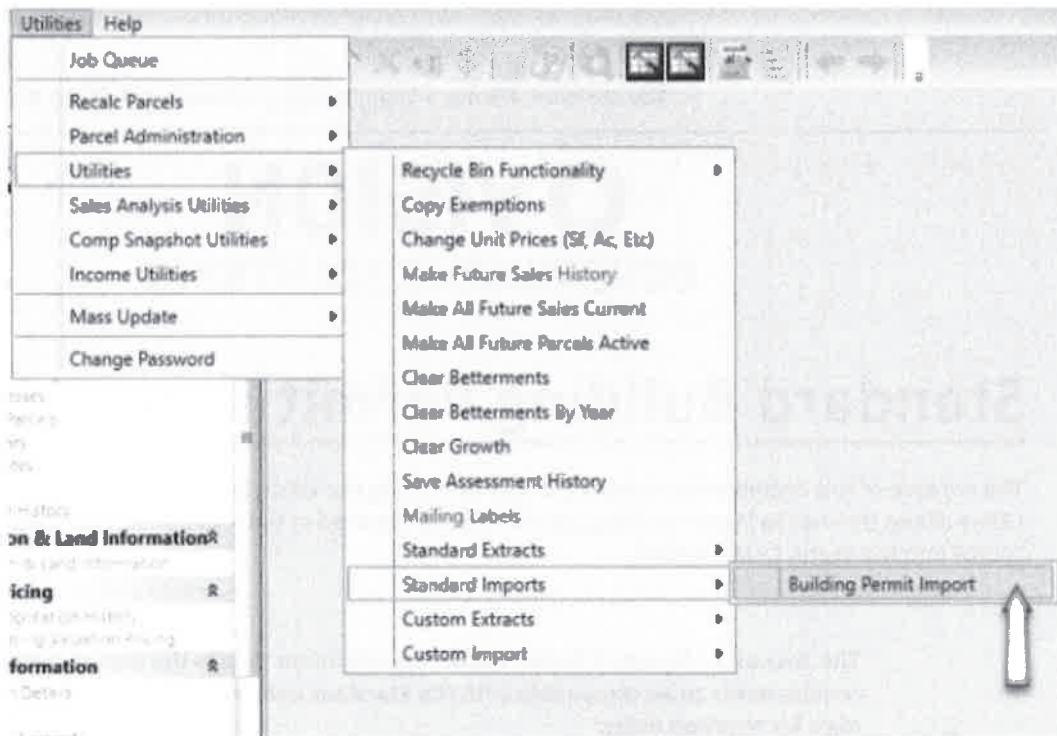
The document *Standard Permit Import Specifications* details the import file layout requirements to be compatible with the Standard Building Permit Import utility as well as the logic for required fields.

The specifications document should be shared with the resource responsible for the building permit database to generate a compatible export file that can be consumed by the Vision Import.

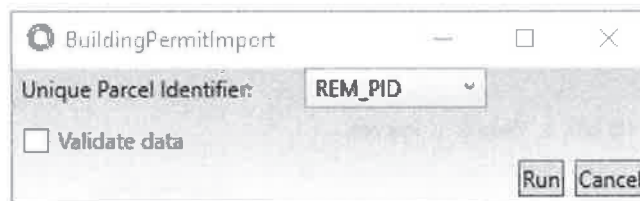
1. Select the file to be used in the permit import and place the file in the C:\Vision8\Imports on the workstation from which the import will run.



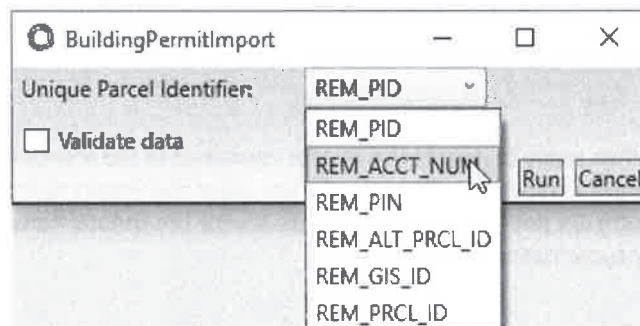
2. When ready to import the records contained in the source file, ensure all users are out of the target database. Locked parcels may cause the import to fail. For assistance with checking if there are any locked parcels please review the **Unlock Parcels in the Admin Application** documentation.
3. The Standard Building Permit utility can be found in CAMA under **Utilities > Utilities > Standard Imports**.



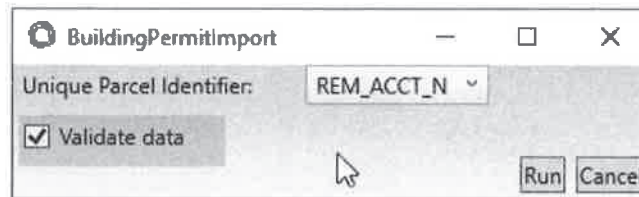
4. Upon selection, the Building Permit Utility will appear.



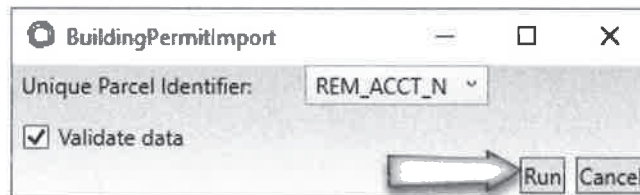
5. Select the Unique Parcel Identifier that is included in the source file. In the below example Account Number is the linking identifier listed in the source file.



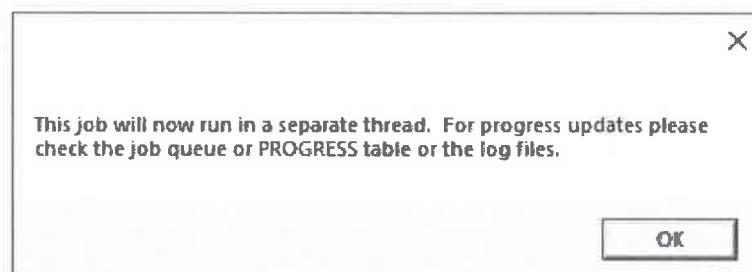
6. Optionally, user may check Validate Data. Selecting this option will result in import rejection of any record in the source file having a value in BPE_STATUS or BPE_TYPE that is not present in the pick key assigned to the respective fields.



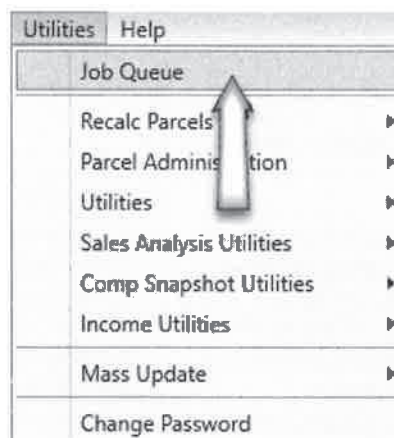
7. Once the import options are complete, the user may click Run to execute the import. If the user is not ready and wishes to exit, select Cancel.



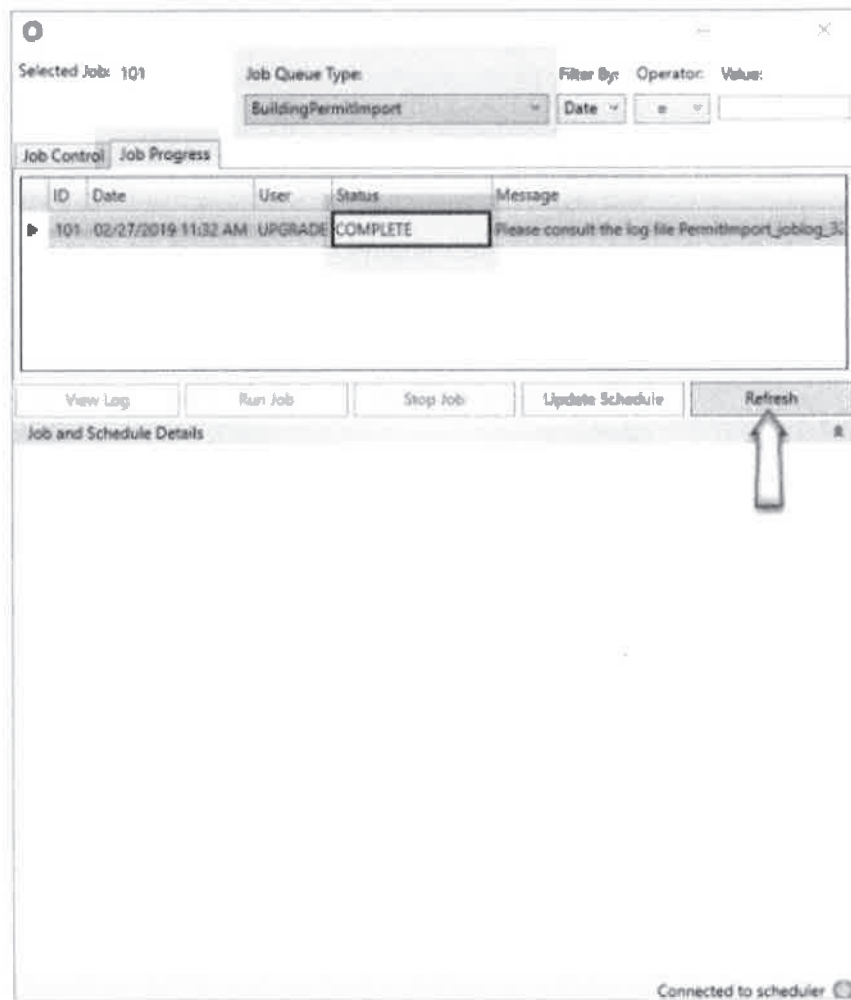
8. A message will appear after selecting run indicating the job is being processed. Click OK to close this message.



9. To review status of the permit import, open the Job Queue under the Utilities menu.



10. Select Job Queue Type: Building Permit Import, then select the Job Progress tab, and click Refresh. The current job will be displayed at the top and any historical jobs of this type run in the database concerned will be displayed below. While running, the Status will indicate IN PROGRESS, click Refresh until the Status is COMPLETE.



11. After the import is complete, the log file can be accessed in C:\Vision8\Imports. This file can be reviewed to ensure all records inserted successfully or to review errors for why specific records were not inserted. For assistance understanding these logs or errors please contact Customer Support.

This PC > OS (C:) > Vision8 > Imports

Name	Date modified	Type	Size
PermitImport_error_log_43272019.txt	2/27/2019 11:43 AM	Text Document	1 KB
PermitImport_joblog_43272019.txt	2/27/2019 11:43 AM	Text Document	1 KB
PermitImport_error_input.txt	2/27/2019 11:42 AM	Text Document	1 KB
PermitImport_error_log_42272019.txt	2/27/2019 11:42 AM	Text Document	1 KB
PermitImport_joblog_42272019.txt	2/27/2019 11:42 AM	Text Document	1 KB
PermitImport_log.txt	2/27/2019 11:42 AM	Text Document	1 KB
PermitImport_joblog_32272019.txt	2/27/2019 11:32 AM	Text Document	1 KB
PermitImport2.txt	2/27/2019 11:12 AM	Text Document	2 KB

12. Records inserted successfully are now available in CAMA on their respective parcels and building records on the Building Permit Screen.

Building #: 1 of 1

Building Permits
☒ Show all Building and Parcel Permits

Permit ID	Year	Iss Date	Tr	Amount	Fee	Insp Date	% Comp	Date Crmp	Comment
▶ 123456	2019	02/16/2019	AD	\$600	\$100		10		
98-14	1996	02/06/1996	AD	\$30,000	\$0	01/01/1996	100	01/01/1996	BED/BATH
94-254	1995	11/28/1994	AD	\$0	\$0	01/01/1996	100	01/01/1996	found 20x
93-131	1994	08/23/1993	AD	\$25,000	\$0	01/17/2013	100	01/17/2013	STOVE HOOK UP

Add Building Permits
Delete Building Permits

Details

Building Number: 1

Permit ID: 123456

Type: AD: Addition

Amount: 600

Fee: 100

Percent Complete: 10

Amount Added:

Reference:

Area:

Dates

Application Date: 01-31-2019

Issue Date: 02-16-2019

Inspection Date: Select a date

Completion Date: Select a date

Year

Fiscal Year: 2019

☒ First Half ☐ Second Half



Standard Permit Import- Specifications

This document is created by Vision to provide clients file format details for Visions Standard Building Permit Import for Vision 8.

Format Requirements

Required File Type: .txt

Required Data Delimiter: Pipe

Required Text Qualifiers: Double quotation marks

File Headers: Headers are required in the first row of the text file

Date Field Format: MMDDYYYY

Business Logic for Import

Automation: None, user to execute manually

Frequency: as needed by client

Unique Parcel Identifier: At run-time, the user must enter the Vision field that matches the text file's parcel unique identifier. The valid options are:

- REM_PID – Max length is 9 numbers
- REM_ACCT_NUM – Max length allowed is 30 characters
- REM_PIN – Max length allowed is 35 characters
- REM_ALT_PRCL_ID – Max length allowed is 35 characters
- REM_GIS_ID – Max length allowed is 30 characters
- REM_PRCL_ID – Max length allowed is 20 characters

General Logic:

- The unique parcel identifier provided in text file must exist in Vision.
- A Building number must be provided in text file.
 - If the building number in the text file does not exist for the subject unique parcel identifier in Vision the import will insert the record on building 1.

Insert Logic: If the permit id provided in the import text file does not exist for that parcel and building number combination, then a new row will be inserted into the BLDGPERM table.

Update Logic: If the permit id provided in the import text file does exist for the parcel and building number combination in Vision CAMA, then the existing row in Vision will have all information updated in the BLDGPERM table from the text file.

User Audit logging: Records inserted or updated via import will be logged.

Specific Field Logic:

- BPE_FISCAL_YR is required and will default to the fiscal year set in Table Maintenance
- (REALCFG.REX_FISCAL_YR). If not provided in file.
- BPE_PLANS will default to 0 if not provided in file.

- BPE_SECOND_HALF will default to 0 if not provided in file.

Error Reporting and Verification:

- If the unique parcel identifier is not found in Vision CAMA the record will be spooled to a log file.
- If a data element is having too many characters or is the wrong data type for a field the row will be excluded and spooled to a log file.
- If a file with the same name has already been processed by the building permit tool, it will be rejected and spooled to a log file.
- At run-time, the user will have an option to accept all data supplied in the text file into pick key fields or have the import validate the data supplied in the text file against the pick key list defined for the BPE_STATUS and BPE_TYPE fields. If the user chooses to validate the data in the text file against the pick key list in Vision and it is not in the list, the record will be rejected and spooled to a log file.

User Actions after Import

Descriptions will require a parcel recalc with labels update checked to properly propagate the description from the configuration table.

Recommendations

File Name: Vision_BuildingPermit_Import_[date].txt

Example: Vision_BuildingPermit_Import_20180118.txt)

Import File Location: The text file for the import will need to be placed in the users C:\vision8\imports

Log File Location: The log for the import will be stored on the users C:\Vision8\logfiles

Examples

Import File: V8_Vision_BuildingPermit_Import_20180101.txt

Header Row:

ACCOUNT_NUMBER|BUILDING_NUMBER|BPE_PERMIT_ID|BPE_FISCAL_YR|BPE_APP_DATE|BPE_ISSUE_DATE|BPE_INSPECT_DATE|
BPE_TYPE|BPE_AMOUNT|BPE_FEE|BPE_APPLICANT|BPE_LICENCE|BPE_COMPANY|BPE_AREA|BPE_REF|BPE_FLOORS|
BPE_PCT_COMPLETE|BPE_DATE_COMPLETE|BPE_COMMENT|BPE_PLANS|BPE_SECOND_HALF|BPE_ADDED_AMOUNT|BPE_STATUS|
BPE_OCC_NUM|BPE_USRFLD_01|BPE_USRFLD_02|BPE_USRFLD_03|BPE_USRFLD_04|BPE_USRFLD_05

Mapping

HEADER_POSITION	TABLE_SCHEMA	TABLE_NAME	FIELD_NAME	DATA_TYPE	DEFAULT_FIELD_LABEL	TEXT_FORMAT_LENGTH
1	N/A	IMPORT	ACCOUNT_NUMBER	varchar(30)		Depends on the unique identification field used
2	N/A	IMPORT	BUILDING_NUMBER	numeric(9,0)		Max length of 9 numbers
3	REAL_PROP	BLDGPERM	BPE_PERMIT_ID	varchar(20)	Permit #	Max length of 20 numbers
4	REAL_PROP	BLDGPERM	BPE_FISCAL_YR	numeric(4,0)	Calendar Year	Max length of 4 numbers
5	REAL_PROP	BLDGPERM	BPE_APP_DATE	datetime2	Application Date	Must be MMDDYYYY format
6	REAL_PROP	BLDGPERM	BPE_ISSUE_DATE	datetime2	Issue Date	Must be MMDDYYYY format
7	REAL_PROP	BLDGPERM	BPE_INSPECT_DATE	datetime2	Inspection Date	Must be MMDDYYYY format
8	REAL_PROP	BLDGPERM	BPE_TYPE	varchar(6)	Permit Type	Max length of 6 characters

HEADER_POSITION	TABLE_SCHEMA	TABLE_NAME	FIELD_NAME	DATA_TYPE	DEFAULT_FIELD_LABEL	TEXT_FORMAT_LENGTH
9	REAL_PROP	BLDGPERM	BPE_AMOUNT	numeric(9,0)	Cost Estimate	Max length of 9 numbers
10	REAL_PROP	BLDGPERM	BPE_FEE	numeric(9,0)	Fee	Max length of 9 numbers
11	REAL_PROP	BLDGPERM	BPE_APPLICANT	varchar(50)	Applicant	Max length of 50 numbers
12	REAL_PROP	BLDGPERM	BPE_LICENCE	varchar(20)	License	Max length of 20 numbers
13	REAL_PROP	BLDGPERM	BPE_COMPANY	varchar(50)	Company	Max length of 50 numbers
14	REAL_PROP	BLDGPERM	BPE_AREA	varchar(20)	Square Footage	Max length of 20 numbers
15	REAL_PROP	BLDGPERM	BPE_REF	varchar(20)	Field Number	Max length of 20 numbers
16	REAL_PROP	BLDGPERM	BPE_FLOORS	numeric(5,2)	Floors	Max length of
17	REAL_PROP	BLDGPERM	BPE_PCT_COMPLETE	numeric(9,0)	Percent Complete	Max length of 9 numbers
18	REAL_PROP	BLDGPERM	BPE_DATE_COMPLETE	datetime2	Completion Date	Must be MMDDYYYY format
19	REAL_PROP	BLDGPERM	BPE_COMMENT	varchar(750)	Comments	Max length of 750 characters
20	REAL_PROP	BLDGPERM	BPE_PLANS	numeric(1,0)	Plans	Check box 1 for Yes 0 for No
21	REAL_PROP	BLDGPERM	BPE_SECOND_HALF	numeric(1,0)	Second Half	Check box 1 for Yes 0 for No
22	REAL_PROP	BLDGPERM	BPE_ADDED_AMOUNT	numeric(9,0)	Total Value	Max length of 9 numbers
23	REAL_PROP	BLDGPERM	BPE_STATUS	varchar(6)	Status	Max length of 6 characters
24	REAL_PROP	BLDGPERM	BPE_OCC_NUM	varchar(25)	OCC	Max length of 25 characters
25	REAL_PROP	BLDGPERM	BPE_USRFLD_01	varchar(100)	User Field 01	Max length of 100 characters
26	REAL_PROP	BLDGPERM	BPE_USRFLD_02	varchar(100)	User Field 02	Max length of 100 characters
27	REAL_PROP	BLDGPERM	BPE_USRFLD_03	varchar(100)	User Field 03	Max length of 100 characters
28	REAL_PROP	BLDGPERM	BPE_USRFLD_04	varchar(100)	User Field 04	Max length of 100 characters
29	REAL_PROP	BLDGPERM	BPE_USRFLD_05	varchar(100)	User Field 05	Max length of 100 characters

Disclaimer

Vision reserves the right to modify these specifications at any time, please contact Vision for the latest version.

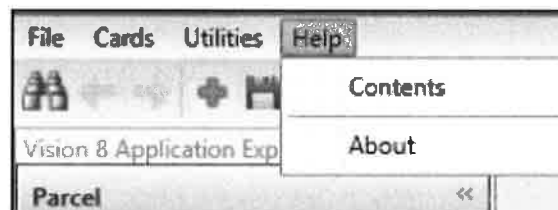
Any client requested modifications are subject to a billable fee determined by scope of work. Scope of work must be defined between Vision and client, an estimation quoted by Vision, and must be approved by the client prior to the start of work. Completion of work is determined by Vision's work prioritization.



Help Menu

This document will walk the user through the options under the Help menu heading of Vision 8.

Clicking the Help menu heading will open the options available within.



Help menu items include:

Contents – Displays the introduction page for the Vision online help system with a contents navigation panel on the left.

About – Displays the Vision 8 software version number and copyright.



Data Entry F.A.Q.

This document contains solutions to several commonly-asked questions regarding the Vision 8 software.

1. Question: Where do I find the Legal Description?

Answer: Click on **Legal Information**, **Supplemental Data** from the **Navigation Tree** on the left to open the Supplemental Data screen.

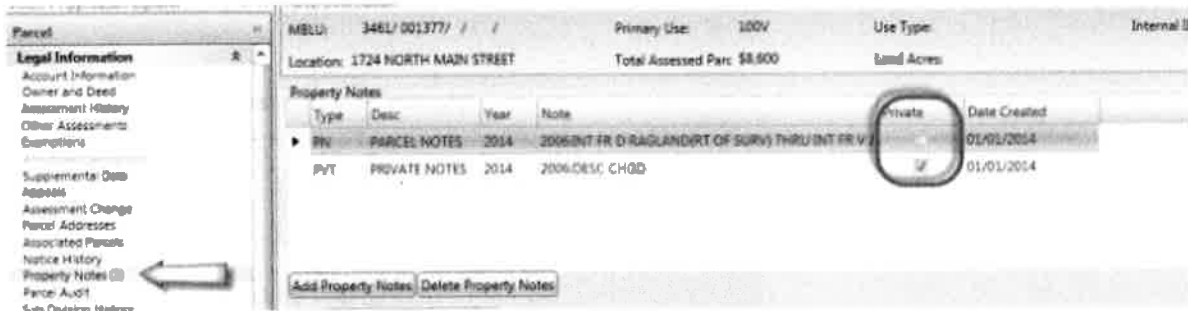
Refer to the **Parcel Description** field.

A screenshot of the Vision 8 software interface. On the left is a "Navigation Tree" with categories like "Legal Information", "Supplemental Data", "Classification & Land Information", "Alt Land Pricing", and "Building Information". "Legal Information" is selected, and "Supplemental Data" is highlighted. The main area displays "Supplemental Data" for a parcel with MBLU 3461/001377. Fields include NEHD Code (T17-1: SOUTH BOSTON), Exempt (00: NO), Total Acres (0), Lotter (KS: 05), Lotter Date (2007-03-28), Mobile Home (0), Levy (38.7), Tracts (0), Road Number (0), PIN (0), and Co ID (01341-05-0001). There are checkboxes for "Internet Suppression", "Non-Disclosure", "Work In Progress", and "Required". At the bottom, the "Parcel Description" field contains "LOT 1 BLK E P01/37 55 X 240 N MAIN ST.".

2. Question: Where can I put property notes?

Answer: Click on **Legal Information**, **Property Notes** from the **Navigation Tree** on the left to open the Property Notes screen.

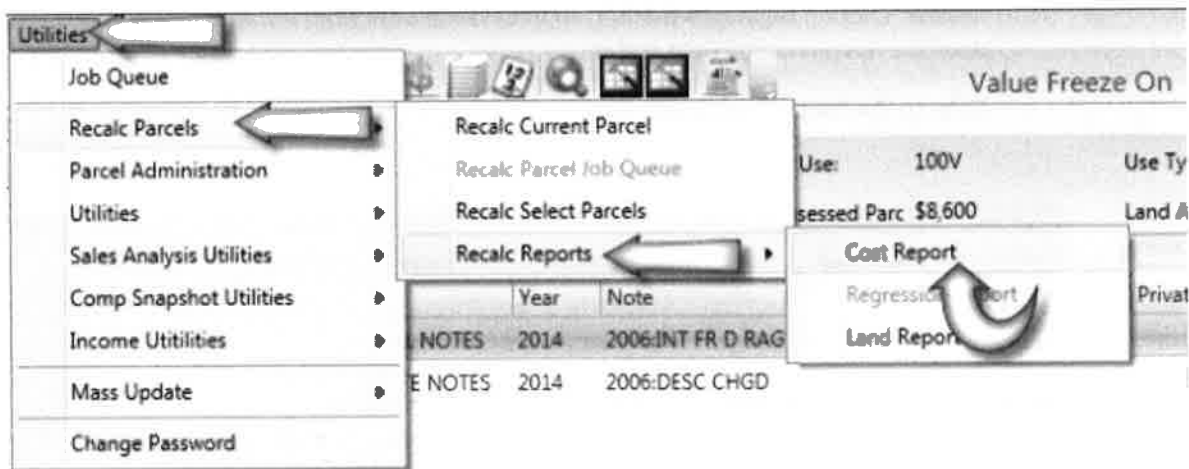
Note: Check the **Private Notes** box to exclude entered notes from being included on the Property Record Card.



3. **Question:** How can I tell exactly how the building or land is being valued?

Answer: Print a Cost Report and/or a Land Report:

Click on **Utilities, Recalc Parcels, Recalc Reports, Cost Report/Land Report.**



4. **Question:** How do I make a vacant parcel an improved parcel?

Answer: The Land Use Codes drive the parcel classification/use – vacant or improved, commercial or residential, etc.

- a. Click on **Classification and Land Information** from the **Navigation Tree** on the left to open the Parcel Information for Land screen.
- b. Click on **Edit Lines**.

Land Details

Block: 1 Line: 1

Use Code: A SFD - Urban Vacant Land Type

Zoning: 000: No Data

District: 100C: SFD - Urban Comm

Frontage: 100E: SFD - Urban Exempt

Depth: 100L: SFD - Urban Comm

Units: 100M: SFD - Urban Vacant

Unit Type: 100T: SFD - Urban MHA

100U: SFD - Urban Comm

200V: SFD - Urban Vacant

200C: SFD - Suburban - Comm

200E: SFD - Suburban - Exempt

200F: SFD - Suburban - Farm

b. Click on **Edit Lines**.

The screenshot shows a software interface with a sidebar on the left containing a 'Navigation Tree' with categories like 'Parcel', 'Building Information', and 'Outbuildings'. The main window displays 'Parcel Information' for a specific parcel, including details like 'Location', 'Total Assess', and 'Land Area'. At the bottom right of the main window, there is a button labeled 'Edit Lines', which is highlighted by a red arrow.

c. Click on the **Land Use Code** drop down arrow to select a Use Code designated for vacant parcels. Typically Land Use Codes that end in R will be for Residential, C for Commercial, and V for Vacant.

The screenshot shows a 'Land Details' window. It has a table with columns for 'Bldg #', 'Line #', 'Use Code', 'Zoning', 'District', 'Frontage', 'Depth', 'Units', and 'Unit Type'. The 'Use Code' column is highlighted, and a dropdown menu is open, showing a list of codes such as 'R-SFD - Urban Vacant', '000: No Data', '100C: SFD - Urban Comm', '100E: SFD - Urban Exempt', '100F: SFD - Urban Comm', '100G: SFD - Urban Exempt', '100H: SFD - Urban Min', '100I: SFD - Urban Comm', '100V: SFD - Urban Vacant', '200C: SFD - Suburban - Comm', '200E: SFD - Suburban - Exempt', and '200F: SFD - Suburban - Perm'. A red arrow points to the dropdown arrow in the 'Use Code' column.

d. Once the Land Use Code is entered, you will then need to enter the style code on **Construction Detail** screen, selected from the **Navigation Tree**.

6. **Question:** How do I do parcel splits or create a subdivision?

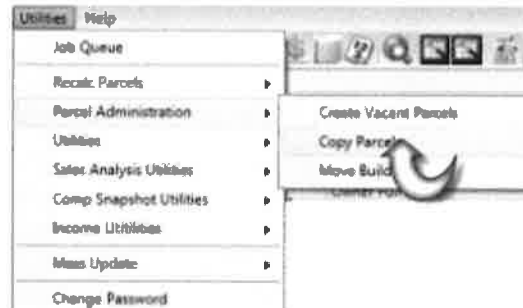
Answer: Click on **Utilities, Parcel Administration, Create Vacant Parcels**.



For additional instruction, please see separate documentation.

7. Question: How do I copy parcel data from one parcel to another parcel(s)?

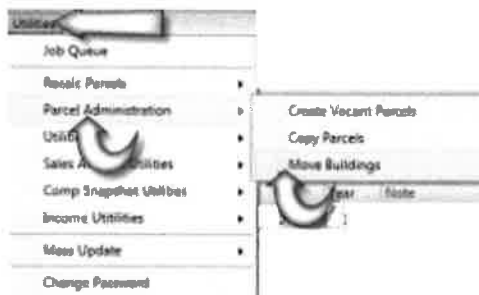
Answer: Click on **Utilities, Parcel Administration, Copy Parcels.**



For additional instruction, please see separate documentation.

8. Question: How do I move a building from one parcel to another parcel?

Answer: Click on **Utilities, Parcel Administration, Move Building.**



For additional instruction, please see separate documentation.

9. Question: How do I transfer a parcel to a different Owner (add a new Owner)?

Answer: Click on **Owner and Deed** from the **Navigation Tree** on the left to open the Owner and Deed screen.

a. Click on **Add Sale**.

Vision II Application Explorer

Parcel Information

Parcel: 043/000/ 0001/ 036/001/ 0000/ Account Number

Tax Class: Owners Name: JOHN SMITH

Internal ID: 123 Location: 3390 Any

F	Book	Page	Date of Transfer	QU	Vac/Imp	Sale Price	VC	Record Date	Reference Number
C			05/07/2018	U	1				
C	2028	299	11/04/2016	U	1	\$1	0		
C			01/02/2001	U	1	\$0	0		

Add Sale Delete Sale View Owner(s) Number of Owners: 1

Owners: JOHN SMITH Edit

Owner Information

Owner: JOHN SMITH Change Address

JOHN SMITH
85 Oak Ridge Cir
Anytown, US 01234

Primary Sale Information

Sale Date: 5/7/2018

Sale Type: -

Sale Price: -

Book: -

Page: -

Validity Code: -

☐ Qualified? ☐ Improved ☐ Future

Notes

b. Enter any length of characters in the **Owner Name** box and click on **Search** to see if the owner is already a property owner

OR

- a. Enter the exact owner name in the **Owner Name** box and click on **Create New Owner** to create a brand new owner name.



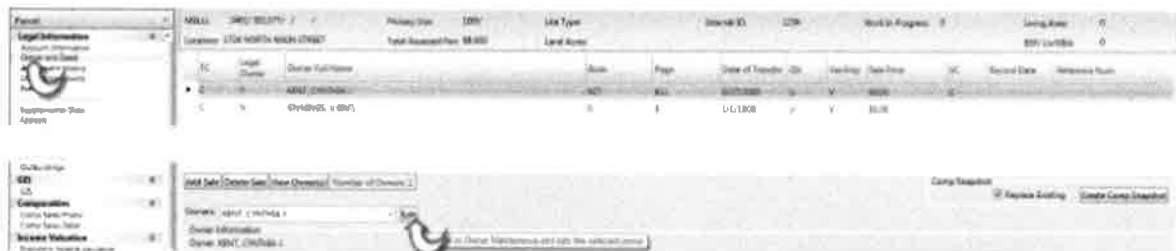
The dialog box titled "Owner Search Criteria" has a close button (X) in the top right corner. It contains three input fields: "Owner Name", "Co-Owner Name", and "Owner Account". Below the "Owner Name" field is a "Select" button. Below the "Co-Owner Name" field is a "Create New Owner" button. A "Search" button is located to the right of the "Owner Account" field.

10. **Question:** How do I change a mailing address?

Answer: Click on **Owner and Deed** from the **Navigation Tree** on the left to open the Owner and Deed screen.

- a. Click on the **Owner** name entry line.

- b. Click on **Edit**.



The "Owner and Deed" screen shows a table of owner information. The table has columns for "Type", "Owner Full Name", "Co-Owner Full Name", "Address Line 1", "City", and "State". The first row shows "Owner" with the name "KIMBERLY L. BROWN". A "Select" button is next to the name. Below the table, there is a "Comp. Statement" button and a "Create Comp. Statement" button. A "Print" button is also visible.

- c. Click on **Update Address**.



The "Update Address" button is located at the bottom of the screen. It is a rectangular button with the text "Update Address". A large curved arrow points to the button.

11. **Question:** How do I remove a building override value?

Answer: Click on **Building Information, Depreciation** from the **Navigation Tree** on the left to open the Depreciation screen.

A. Remove the **Appraised Override Value** and the **Assessed Override Value** amounts by clicking in each of the boxes and using the Backspace key on the keyboard, clearing the contents.

B.Remove the **Override ID** by clicking in the box then clicking the Delete key on the keyboard.

12. **Question:** How do I remove a land override value?

Answer: Click on **Classification and Land Information** from the **Navigation Tree** on the left to open the Classification and Land Information screen.

a. Click on **Edit Lines**.

b. Uncheck the **Override Assessed Land Value** box and the **Override Appraised Land Value** box.

Land Details

Building # Line Num Land Type (Site)

Use Code Lot Type

Zoning Unit Price

District Land Type Adj

Frontage Site Adj.

Depth Neighborhood

Land Units Nhbd. Adj.

Unit Type

Special Calcs

Notes

Adjustments (Special) %

☒ Override Appraised Land Value

☒ Override Assessed Land Value

Totals

Appraised	887500.00	Assessed	887500.00
-----------	-----------	----------	-----------

Next Add Delete Close

13. *Question:* How do I unfreeze a parcel?

Answer: Click on **Legal Information, Account Information** from the **Navigation Tree** on the left to open the Account Information screen and check the Value Unfrozen check box.


- Find the check box labeled "Value Unfrozen" or similarly named.
- Click your mouse in the check box to add a check.
- The proposed amount column will be removed and you will now only see one Amount column.

Alt ID 000010020305

Cross Street 1


Cross Street 2

☒ Value Unfrozen

Assessing Neighborhood 

Res Nbhd

District Code

Current Assessment 

Code	Description	Type	Amount
100	Building	Building	\$351,500
100	Land	Land	\$63,700
100	Outbldg	Outbldg	\$5,400
Total Assessed Parcel Value			\$420,600




© 2019 Vision Government Solutions Inc. All Rights Reserved.
 1 Cabot Rd. Hudson, MA 01749 (800) 628-1013 www.vgsi.com
 Equal Opportunity Employer/Affirmative Action Employer



How to Add a New Parcel

The purpose of this document is to assist the user in filling out all required information for creating a new parcel.

1. Log into the Appraisal Vision Application. Once the application is loaded click on the **Add New Parcel** button  in the top left hand corner of the screen.



2. In the **New Parcel** window, enter the **MBLU**, **Account Number**, **Property Location**, and **City, State, Zip**.



- Both the **MBLU** and the **Account Number** must be unique from those used on other parcels.
- If your municipality does not use **Account Numbers**, fill in the **MBLU** value in this field as well.

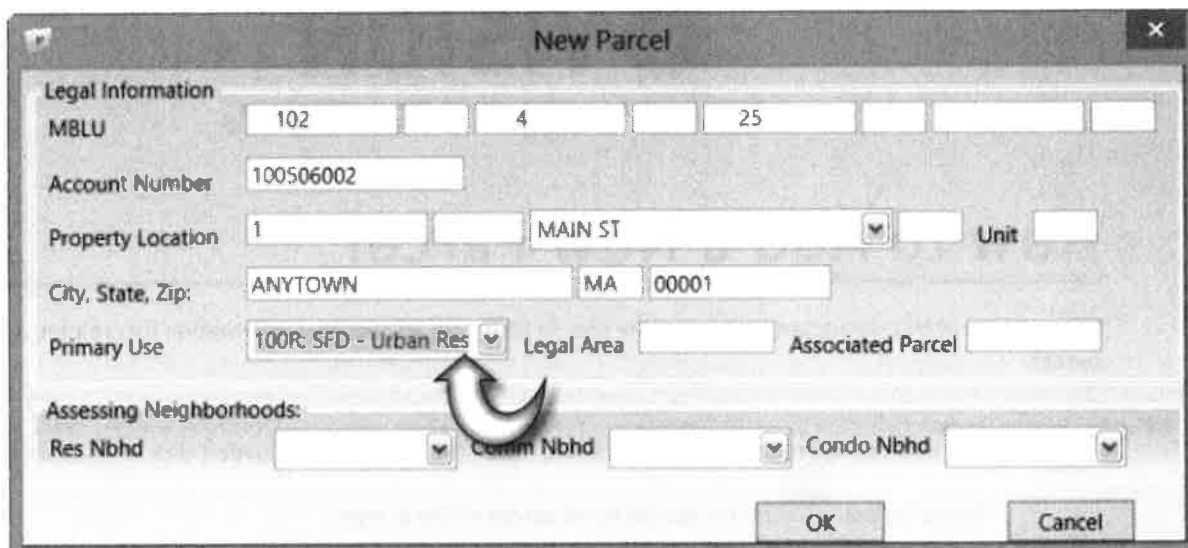
A screenshot of the 'New Parcel' form. The form has a title bar 'New Parcel' with a close button. It contains several sections: 'Legal Information' with fields for 'MBLU' (a long text field), 'Account Number' (a text field), 'Property Location' (a text field with a dropdown arrow), and 'City, State, Zip' (a text field). Below these are 'Primary Use' (a dropdown menu), 'Legal Area' (a text field), and 'Associated Parcel' (a text field). The 'Assessing Neighborhoods' section includes 'Res Nbhd' (a dropdown menu), 'Comm Nbhd' (a dropdown menu), and 'Condo Nbhd' (a dropdown menu). At the bottom right are 'OK' and 'Cancel' buttons. On the left side of the form, there are four arrows pointing to the 'MBLU', 'Account Number', 'Property Location', and 'City, State, Zip' fields.

3. Enter the **Primary Use Code** for the new parcel in the **Prim Bldg Use** field. Remember, because label localization options allow fields to be renamed, this field, and others, may have different names (e.g. "Primary Use" instead of "Prim Bldg Use").



You can enter the code in two ways:

- Type the Code in the **Prim Bldg Use** field
- Use the pick list to select from existing **Land Use** codes in the database. This can be accessed either by clicking the drop down arrow on the **Prim Bldg Use** field or by clicking the **Prim Bldg Use** field and hitting the **F6** key.



New Parcel

Legal Information

MBLU: 102 4 25

Account Number: 100506002

Property Location: 1 MAIN ST Unit

City, State, Zip: ANYTOWN MA 00001

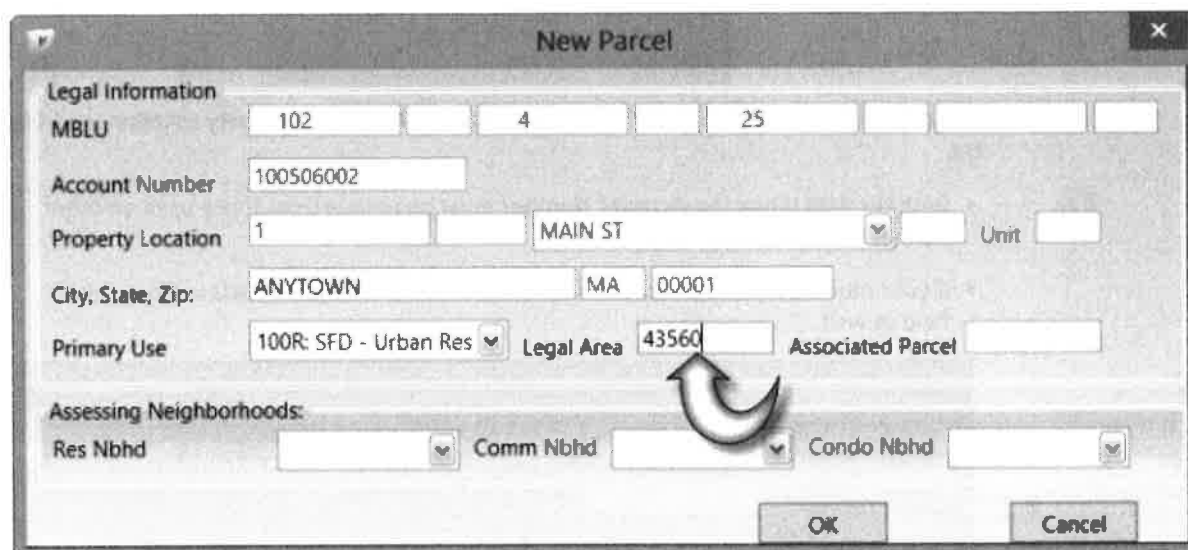
Primary Use: 100R: SFD - Urban Res Legal Area: Associated Parcel:

Assessing Neighborhoods:

Res Nbhd: Comm Nbhd: Condo Nbhd:

OK Cancel

4. Enter the **Legal Area** of the parcel in square feet.



New Parcel

Legal Information

MBLU: 102 4 25

Account Number: 100506002

Property Location: 1 MAIN ST Unit

City, State, Zip: ANYTOWN MA 00001

Primary Use: 100R: SFD - Urban Res Legal Area: 43560 Associated Parcel:

Assessing Neighborhoods:

Res Nbhd: Comm Nbhd: Condo Nbhd:

OK Cancel

5. Enter the **Assessing Neighborhood** for **Res. NBHD**, **Comm. NBHD**, and **Condo NBHD**



You can enter the **Assessing Neighborhood** codes in two ways:

- Type the code into the **Assessing Neighborhood** fields.
- Use the pick list to select from existing **Assessing Neighborhood** codes in the database. This can be accessed either by clicking the drop down arrow on the **Assessing Neighborhood** field or by clicking the **Assessing Neighborhood** field and hitting the **F6** key.

New Parcel

Legal Information

MBLU: 102 4 25

Account Number: 100506002

Property Location: 1 MAIN ST Unit

City, State, Zip: ANYTOWN MA 01234

Primary Use: 100R Urban Res Legal Area: 435 Associated Parcel:

Assessing Neighborhoods:

Res Nbhd: 0001: Default Dist Comm Nbhd: 0001: Default Dist Condo Nbhd: 0001: Default Dist

OK Cancel

6. Click **OK** after all the required information is populated.

New Parcel

Legal Information

MBLU: 102 4 25

Account Number: 100506002

Property Location: 1 MAIN ST Unit

City, State, Zip: ANYTOWN MA 01234

Primary Use: 100R: SFD - Urban Res Legal Area: 43560 Associated Parcel:

Assessing Neighborhoods:

Res Nbhd: 0001: Default Dist Comm Nbhd: 0001: Default Dist Condo Nbhd: 0001: Default Dist

OK Cancel



After clicking **OK**, the **Account Information** screen opens.

Account Information

MBLU: 102 4 25 Edit Mblu Parcel Status: Active

Account Number: 100506002 W-P-B Owner Occupied: Create Date: 10/23/2014

Unit: Unit Type:

Property Location: 1 MAIN ST Legal Area: 43560

City/County/Zip: ANYTOWN MA 01234 Primary Use: 100R: SFD - Urban Res

State/Country: MA PID: 100506002

Owner Name: Visited

Building Name: Value Unbroken

Alt ID: 100506002

Cross Street 1: Cross Street 2:

Assessing Neighborhoods:

Res Nbhd: 0001: Default Dist Comm Nbhd: 0001: Default Dist Condo Nbhd: 0001: Default Dist

District Code: Class Code:

Current Assessment

Code	Description	Type	Amount	Proposed Value
Total Assessed Parcel Value: \$0				

Create New

Parcel ID: Description: Complex ID:

Associated Parcels

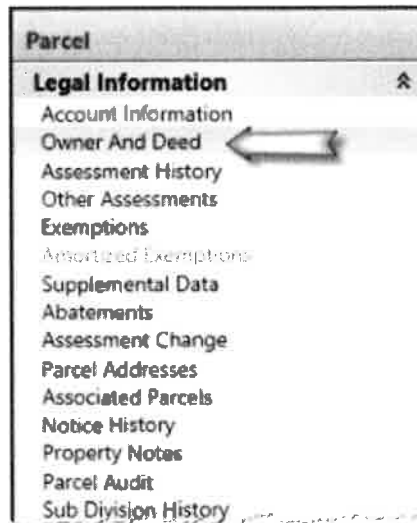
Associated Parcel ID: Associated Parcel:



The following fields are optional and not required. If information is being tracked in these fields, enter the data on the **Account Information** screen.

- W-B-P(Ward-Precinct-Block)
- Cross Street 1 and Cross Street 2
- PIN
- Alt ID

7. Select **Owner and Deed** from the **Legal Information** sub menu, located in the navigation tree on the left hand side of the screen.



The **Owner and Deed** screen opens after being selected.

8. To add a new sale to this parcel, click the **Add Sale** button.

FC Legal Owner Owner Full Name

Add Sale Delete Sale View Owner(S)

Owners: [dropdown] Edit

9. Enter the **Owner Name**, then click the **Search** button or press **Enter**.

Owner Search Criteria

Owner Name Co-Owner Name Owner Account

JOSEPH JONES [empty] [empty] Search

Select Create New Owner

10. The **Owner Search Criteria** screen will appear. If the owner is already in the municipality's database, select the owner from the search results, then click the **Select** button or press the **Enter** key on the keyboard.

Owner Search Criteria

Owner Name Co-Owner Name Owner Account

[empty] [empty] [empty] Search

Select Create New Owner

Owner Full Name	Co-Owner Full Name	Address Line 1	City	State	Zip
JOSEPH JONES		1 Main St	Anytown	MA	00000-0000
JOSEPH JONES		2 Main St	Anytown	MA	00000-0000
JOSEPH JONES		3 Main St	Anytown	MA	00000-0000
JOSEPH JONES		4 Main St	Anytown	MA	00000-0000
JOSEPH JONES		5 Main St	Anytown	MA	00000-0000
JOSEPH JONES		6 Main St	Anytown	MA	00000-0000

11. If the owner does not currently exist in the database, click **Create New Owner**.

Owner Search Criteria

Owner Name Co-Owner Name Owner Account

[empty] [empty] [empty] Search

Select Create New Owner

Owner Full Name	Co-Owner Full Name	Address Line 1	City	State	Zip

12. Add the Owner, Co-Owners' full name, and any other tracked information if applicable, then click the **OK** button.

Add New Owner

Owner Information

First Name: Last Name: Middle: ☐ Edit Full Name

Co-Owner Full Name: ☐ Edit Full Name

Owner Address: Address Line 1:

City: State: Zip:

13. Enter the Sale information, including **Date of Sale**, **Sale Type**, **Sale Price**, **Book**, **Page** and **Validity Code**.

Primary Sale Information

Sale Date:

Sale Type:

Sale Price:

Book:

Page:

Validity Code:

☒ Qualified? ☒ Improved ☐ Future

Notes:



You can enter the **Sale Type** and **Validity Code** in two ways:

- Type the code into the field.
- Use the pick list to select from existing code in the database. This can be accessed either by clicking the drop down arrow on the field or by clicking the field and hitting the F6 key.



The **Validity Code** determines if the sale is **Qualified** or **Unqualified**.



You will now see the new Owner on the top line as well as the owner's mailing address in the bottom section.

FC	Legal Owner	Owner Full Name	Book	Page
C	Y	JOHN S SMITH	504	23

Add Sale
Delete Sale
View Owner(S)
Number of Owners: 1

Owners: JOHN S SMITH
Edit

Owner Information
Owner JOHN S SMITH
JOHN S SMITH
1 MAIN ST
ANYTOWN, MA 01234

Primary Sale Information



Note: Each Sale Line has a designated field for deed notes. This is not a required field. This space is available for special notes pertaining to the sale.

Primary Sale Information

Sale Date 10/20/2014

Sale Type A: Family Sales

Sale Price 250000

Book 504

Page 23

Validity Code 01: VALID SALE


☒ Qualified? ☒ Improved ☐ Future

Original owner

Notes


- Next, the **Value Source** for the parcel should be entered. Select **Assessment History** from the **Legal Information** sub menu, located in the navigation tree on the left hand side of the screen.

Parcel

Legal Information 

Account Information

Owner And Deed

Assessment History 

Other Assessments

Exemptions

Amortized Exemptions

Supplemental Data

Abatements

Assessment Change

Parcel Addresses

Associated Parcels

Notice History

Property Notes (3)

Parcel Audit

Sub Division History

 The **Assessment History** screen will open.

Assessment Summary

	Value	Date	Status	Selected Value	Appraised	Assessed
Regession	\$0			Total Building Value		
Market Comp Sales	\$0			Total Extra Feature Value		
Comp Apportionment				Total Outbuilding Value		
Total Apportionment	\$0			Total Land Value		
Income	\$0			Total Value		
Cost	\$90,500	10/23/2014	C			
Trend	\$0					

Value Source:

Assessment Ratio: 100

Primary Use: 100R

Value	Type	Reason Code	Date	Id	Comment
Override	Remove	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Adjustment	Remove	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Assessment History

Num	Year	UF	Date	Class	Use	Building Value	XF Value	Outbuilding Val	Improved Value	Land Value	Total Value	Exemptions	Source	Comment

Assessment Details

Ignore Errors

15. Enter a valid **Value Source**. Value Source dictates the Valuation Approach to Value the Parcel.



You can enter the **Value Source** code in two ways:

- Type the code in the **Value Source** field
- Use the pick list to select from existing codes in the database. This can be accessed either by clicking the drop down arrow on the **Value Source** field or by clicking the **Value Source** field and hit the **F6** key.

Assessment Summary			
	Value	Date	Status
Regression	\$0		
Market Comp Sales	\$0		
Comp Apportionment			
Total Apportionment	\$0		
Income	\$0		
Cost	\$90,500	10/23/2014	C
Trend	\$0		

Value Source:

Assessment Ratio: 100

	Value	Type	Reason
Override	<input type="text" value="Remove"/>	<input type="text" value=""/>	<input type="text" value=""/>
Adjustment	<input type="text" value="Remove"/>	<input type="text" value=""/>	<input type="text" value=""/>

Assessment History

Num	Year	I/F	Date	Class	Use	Building Value	%

16. Next, the **Classification and Land Information** data for the parcel needs to be populated. Select **Classification & Land Information** from **Classification & Land Information** sub menu, located in the navigation tree on the left hand side of the screen.

Classification & Land Information

- Classification & Land Information
- Building Information**
- Construction Details
- Depreciation
- Condo Main Elements
- Associated Condos
- Extra Features
- Building Permits
- Fires
- Visit History
- Building Notes

- The **Classification and Land** screen will open.

Property Factors

Utilities	Street	Lead Plain	Topo
Utilities	Street	Floodway	Soil Type
Utilities	Street	Easement	Location

Land Valuation Neighborhoods

Base Nbrhd: 0001	Sub Nbrhd: A	GIS Region
County Nbrhd: 0001	Sub Nbrhd:	Pocket Nbrhd:
		Z Contour:

Lot Features

Frontage: 0	Depth: 0	Gr Area: 0
Back Frontage: 0	Perimeter: 0	Gr Perimeter: 0
Num Frontage: 0	Lot Type:	

Building Classification And Land Use Valuation

Blg #	Line #	Code	Description	Units	Unit Type	Appraised	Assessed	Acres	Discount	Zone	Land Type	Land Type Desc
1	1	100R	SFD - Urban Res	43,560	SF	\$0.00	\$0.00					

Land Acres

1	Appraised	\$0.00
---	-----------	--------

Info View

100R	SFD - Urban Res	100	R
------	-----------------	-----	---

17. **Property Factors** section fields are not required. If information is being tracked in these fields, enter here.



Any **Property Factor Fields** not being used can be suppressed in the **Admin Module**.

Property Factors		Street		Road Price		Type	
Utilities		Street		Floodway		Soil Type	
Utilities		Street		Easement		Location	

18. The **Land Valuation Neighborhoods** section contains fields that populate **Sub NBHD's**, **GIS Region**, **Pocket NBHD**, and **Z Contour** if applicable. These fields may not be required.

Land Valuation Neighborhoods		
Res Nbhd	0001	Sub Nbhd A
Comm Nbhd	0001	Sub Nbhd
		Gis Region
		Pocket Nbhd
		Z Contour

19. The **Lot Factors** section contains fields that can be populated for informational purposes but they are not required fields and have no impact on value.

Lot Factors		
Frontage	0	Depth
Sec Frontage	0	Perimeter
Num Frontage	0	Lot Type
		Gis Area
		Gis Perimeter

20. Click on **Edit Lines** button.

Building Classification And Land Line Valuation											
Bldg #	Line #	Code	Description	Units	Unit Type	Appraised	Assessed	Acres Discount	Zone	Land Type	Land Type Desc
1	1	100R	SFD - Urban Res	43,560	SF	\$0.00	\$0.00				

Land Acres	1	Appraised	\$0.00
Mix Use	100R	SFD - Urban Res	100 R

 **Edit Lines**

21. This will open the **Land Detail Information** for the parcel. Required Fields are marked by a red border and exclamation mark.

The screenshot shows the 'Land Details' window. At the top, there are fields for 'Bldg #' (1) and 'Line #' (2). To the right is a 'Site Index' dropdown with an exclamation mark icon. Below these are two columns of fields. The left column includes 'Use Code*', 'Zoning', 'District', 'Frontage', 'Depth', 'Units', and 'Unit Type' (set to 'SF: Square Feet'). The right column includes 'Land Type', 'Unit Price', 'Influence Factor' (1), 'Condition Factor' (1), 'Nbhd', 'Nbhd Adj' (1), and 'Size Adjust'. Fields with red borders and exclamation marks are 'Use Code*', 'Land Type', 'Unit Price', 'Nbhd', and 'Nbhd Adj'. Below these columns are 'Special Cals', 'Notes', 'Special Use' (0 to 100%), and checkboxes for 'Override Appraised Land Value' and 'Override Assessed Land Line Value'. At the bottom, there are 'Totals' for 'Appraised' and 'Assessed', and buttons for 'Print', 'Add', 'Delete', and 'Close'.

- Available **Use Code**, **Zoning**, and **District** items are entered in **Table Maintenance** or the **Admin Module**. See their respective sections for adding new codes.

- To enter a specific unit price, set the **Site Index** to 0

This screenshot shows the 'Land Details' form with specific data entered and annotations. 'Bldg #' is 1 and 'Line #' is 2. 'Site Index' is set to 0. In the left column, 'Use Code*' is '100R: SFD - Urban Re', 'Zoning' is 'ZA: ZONE A', 'District' is 'D1: DISTRICT 1', 'Units' is '2500', and 'Unit Type' is 'SF: Square Feet'. In the right column, 'Land Type' is empty, 'Unit Price' is '2.56', 'Influence Factor' is 1, 'Condition Factor' is 1, 'Nbhd' is empty, 'Nbhd Adj' is 1, and 'Size Adjust' is 1. An arrow labeled '2' points to the 'Unit Price' field. A curved arrow labeled '1' points to the 'Site Index' dropdown, indicating the sequence of actions.

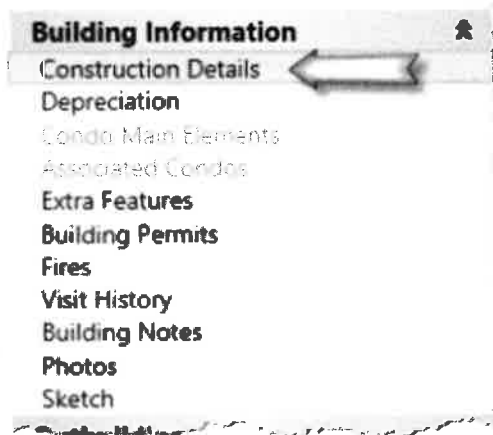
22. When you have finished filling out the information for the new land line, click **Close** at the bottom of the **Land Details** screen.

Totals

Appraised 6400 Assessed 6400

Next Add Delete Close

23. Next, the building information needs to be entered for this parcel. Select **Construction Details** from the **Building Information** sub menu, located in the navigation tree on the left hand side of the screen.



24. The **Construction Details** screen will open. Required fields will be marked with a red border and exclamation point. Fill out all relevant fields.

Building 1 Section 1

Model: 01 Residential Fuel Type 2: Bedrooms: Total Rooms: Full Baths: Full Bath Grade: Half Baths: Half Bath Grade: Entry Features: Extra Feature Check: Split Level: Split Payer: Porch/Deck: Chimneys: Fireplace Opening: Basement Type: Basement Area: Living Area



You can enter the **Construction Details** information in two ways:

- Type the code or value in the appropriate field.
- Use the pick list to select from existing codes in the database. This can be accessed either by clicking the drop down arrow on the field concerned or by clicking the field and hit the **F6 key**.

Model: 01: Residential

Style: [dropdown]

Grade: [dropdown]

Stories: [dropdown]

Foundation Type: [dropdown]

Foundation Type: [dropdown]

Exterior Wall 1: [dropdown]

Exterior Wall 2: [dropdown] (Menu open)

Exterior Wall 3: [dropdown]

Overall Cndtn: [dropdown]

Roof Structure 1: [dropdown]

Roof Cover 1: [dropdown]

Roof Cover 2: [dropdown]

Interior Wall 1: [dropdown]

Interior Wall 2: [dropdown]

Interior Floor 1: [dropdown]

Fuel Type 1: [dropdown]

Fuel Type 2: [dropdown]

Rooms: [dropdown]

Room: [dropdown]

Baths: [dropdown]

Bath G: [dropdown]

Baths: [dropdown]

Bath G: [dropdown]

Fixtur: [dropdown]

Fixtur: [dropdown]

Level: [dropdown]

Foyer: [dropdown]

Fireplaces: [dropdown]

Chimneys: [dropdown]

Fireplace O: [dropdown]

Menu items for Exterior Wall 2: 10: SF Dwelling, 11: Mobilehome, 12: Multi-Family, 13: Office, 15: Restaurant, 16: Retail, 17: Split, 18: Townhouse, 19: Triplex, 20: Warehouse, 21: Quadplex, 94: Vacant W/Outbuildings, 99: Vacant Land

25. Next, depreciation information needs to be entered for this parcel. Select **Depreciation** from the **Building Information** sub menu, located in the navigation tree on the left hand side of the screen.

Building Information

- Construction Details
- Depreciation**
- Condo Main Elements
- Associated Condos
- Extra Features
- Building Permits
- Fires
- Visit History
- Building Notes
- Photos
- Sketch

- After selecting the **Depreciation** sub-menu, the **Depreciation** screen opens.

Building #: 1 of 1 Section: 1 of 1

Depreciation Title: [text]

Section Level Depreciation

Year Built: 1973

Effective Year Built: [text]

Functional Obso: [text]

Economic Obso: [text]

Condition: [text]

Percent Complete: [text]

Depreciation Code: [text]

Remodel Rating: [text]

Year Remodeled: [text]

Override Value: [text]

Section Summary

Group: S/N

Base Rate: 50

Eff Base Rate: \$119.41

Net Other Adj: \$2.00

Living Area: 2052

Effective Area: 2052

Size: \$257,334

Bldg % Good: 64

ACRUD: \$164,700

Code	Description	Gross	Living	Eff Area
1ST	1st Floor	2052	2052	2052
BKR	Bunker	2052	0	103

Value Type Reason Code Date

% Good: [text] [text] [text] [text]

Misc Improve: [text] [text] [text] [text]

Cost To Cure: [text] [text] [text] [text]

Override Appraised: [text] Override Assessed: [text] Override ID: [text]

26. Enter the **Year Built** and the **Depreciation Code**.

Depreciation Title
Section Level Depreciation

Year Built	2005	
Effective Year Built	2007	<input type="checkbox"/> Ovr EYB
Functional Obsol		
Economic Obsol		
Condition		
Percent Complete		
Depreciation Code	G: Good	
Remodel Rating		
Year Remodeled		Override Initials
Override Value		

Value Type Reason



You can enter the **Depreciation Code** in two ways:

- Type the code or value in the **Depreciation Code** field.
- Use the pick list to select from existing codes in the database. This can be accessed either by clicking the drop down arrow on the **Depreciation Code** field or by clicking the field and hit the **F6** key.



If the parcel is under construction, enter the **Status** and **Percent Complete**.

Depreciation Title
Section Level Depreciation

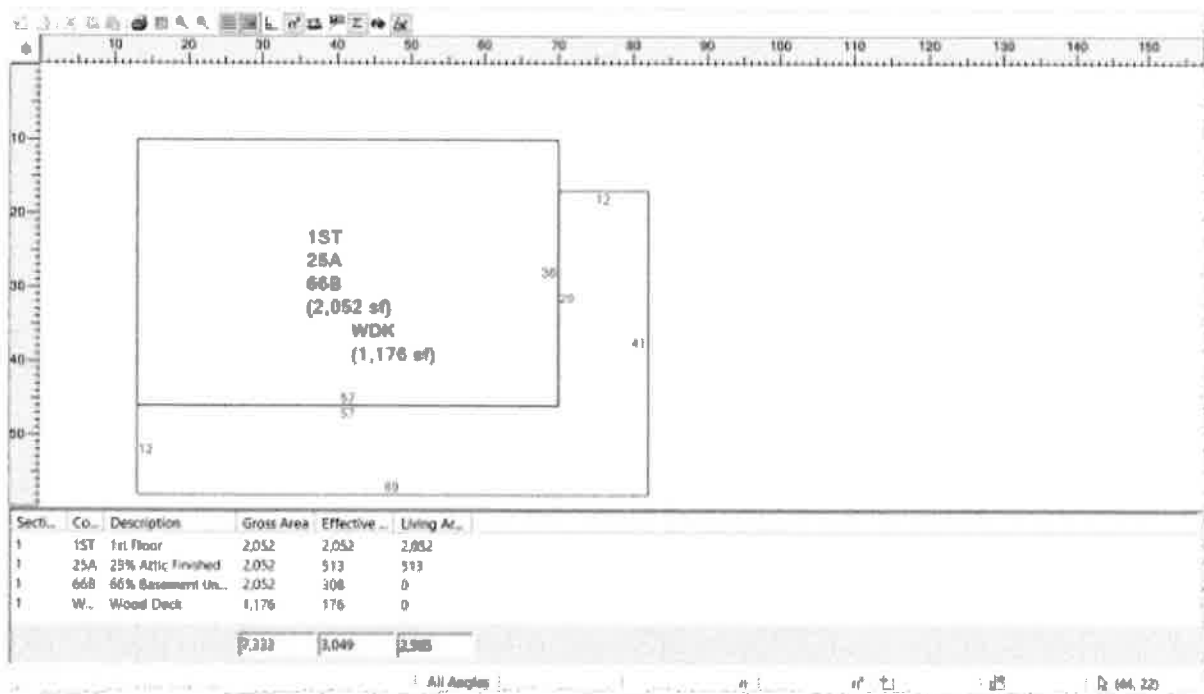
Year Built	2005	
Effective Year Built	2007	<input type="checkbox"/> Ovr EYB
Functional Obsol		
Economic Obsol		
Condition	UC: Under Const	
Percent Complete	85	
Depreciation Code	G: Good	
Remodel Rating		
Year Remodeled		Override Initials
Override Value		

Value Type Reason

27. A **Sketch** needs to be added to the parcel if it has a building to provide gross, living, and effective area values. Select **Sketch** from the **Building Information** sub menu, located in the tree on the left hand side of the screen.




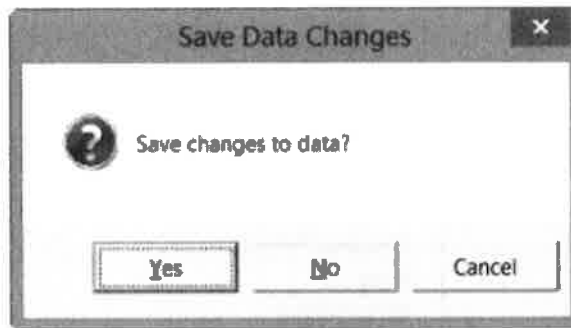
28. Enter your **Sketch**. See **Sketching Instructions** for directions for adding sketches to a parcel.



29. Once the **Sketch** is complete, click on the **save changes icon**  or press the **F2** key to save your changes.



 If you pressed the **F2** key, Vision will ask if you want to save changes. Click Yes.



© 2019 Vision Government Solutions Inc. All Rights Reserved.
1 Cabot Rd. Hudson, MA 01749 (800) 628-1013 www.vgsi.com
Equal Opportunity Employer/Affirmative Action Employer



How to Add a Second Building to a Parcel

The purpose of this document is to assist the user in adding an additional building to a parcel, including completing all required fields

1. Log into the Appraisal Vision Application. Once the application is loaded search for the parcel to which the new building will be added.
2. Once on the selected parcel, click **Construction Detail** from the **Building Information** sub menu, located in the navigation tree on the left hand side of the screen.



3. This will open the **Construction Detail** Screen. This screen will appear different depending on what model (Residential, Commercial, Condo, or Condo Main) the parcel is or the fields your jurisdiction enabled.

Parcel Information

MBL# XXX1/ XXX2/ XXX3/ 3000 Primary Use: 100C Use Type: Internal ID: 4000 Work to Page 0 Living Area: 4410
 Location: MND MAP# 57 Total Acreage: \$371,000 Land Area: .57 Sq. Feet: 04.13

Value Rate Values

Value Source: C Living Area: 4410 Rch: \$411,430 Regression: Income: 50
 Eval Bldg Use: 100C Effective Area: 4325 Bldg % Good: 52.00
 Style: 08 Site Adj Factor: 1 RCNLD: \$337,400

Building #: 1 of 1 Section: 1 of 1

Model	04 CoreInd	Heat Fuel 2	
Style	00 Cottage	Bedrooms	
Grade	04 A/D	Total Rooms	
Stories		Full Bath	
Foundation 1	10 Slab	Full Bath Grade	
Foundation 2		Half Bath	
Exterior Wall 1	05 Brick Siding	Extra Features	
Exterior Wall 2	MA Masonite	Fireplace Opening	
Exterior Wall 3	MA Masonite	Chimneys	
Roof Structure	10 Dome	Basement Type	
Roof Cover 1	SL Slate	Total Living Area	
Roof Cover 2		Basement Area	
Interior Wall 1		Year Built	
Interior Wall 2			
Interior Floor 1			
Interior Floor 2			
Interior Floor 3			
Heat Type 1			
Heat Type 2			
Air Type 1			
Air Type 2			
Heat Fuel 1			

4. Click on **Add New Building**  button at the top right hand corner of the screen.

Building #:    1  of 1

Basement  

 This will open a **Land Use Codes** screen.

Land Use Codes

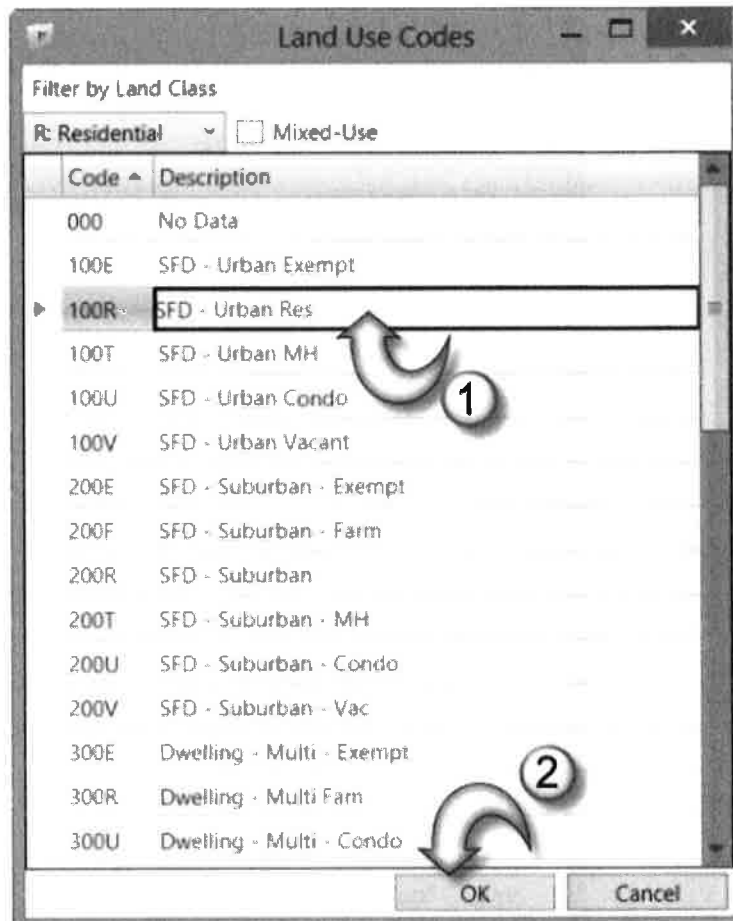
Filter by Land Class

R: Residential ☐ Mixed-Use

Code	Description
000	No Data
100E	SFD - Urban Exempt
100R	SFD - Urban Res
100T	SFD - Urban MH
100U	SFD - Urban Condo
100V	SFD - Urban Vacant
200E	SFD - Suburban - Exempt
200F	SFD - Suburban - Farm
200R	SFD - Suburban
200T	SFD - Suburban - MH
200U	SFD - Suburban - Condo
200V	SFD - Suburban - Vac
300E	Dwelling - Multi - Exempt
300R	Dwelling - Multi Fam
300U	Dwelling - Multi - Condo

OK Cancel

5. Choose the **Land Use Code** for the Building and then click **OK**.



The application will open the **Construction Detail Screen** for the added Building.

Field	Value
Model	R1 Residential
Style	Style Type 1
Grade	Grade Type 1
Stories	Bedrooms
Foundation Type	Total Rooms
Foundation Type 2	Full Baths
Exterior Wall 1	Full Bath Grade
Exterior Wall 2	Half Baths
Exterior Wall 3	Half Bath Grade
Overall Ceiling	Extra Features
Roof Structure 1	Extra Feature Grade
Roof Cover 1	Spoke Level
Roof Cover 2	Spoke Foyer
Interior Wall 1	Fireplaces
Interior Wall 2	Chimneys
Interior Floor 1	Fireplace Opening
Interior Floor 2	Basement Type
Interior Floor 3	Basement Area
Mail Type	Living Area

- Fill in the required fields, marked with a red outline and exclamation mark. Required fields can be set in the **Admin Application** and are different for each jurisdiction; however **Style**, **Model**, and **Grade** are required for the basic functions of Vision.

Model: 01: Residential
 Style: 1B: Townhouse
 Grade: 05: GOOD
 Stories:
 Foundation Type: CN: Concrete
 Foundation Type:
 Exterior Wall 1: AL: Aluminum
 Exterior Wall 2:
 Exterior Wall 3:
 Overall Cdn:
 Roof Structure 1:
 Roof Cover 1: SH: Shakes
 Roof Cover 2:
 Interior Wall 1:
 Interior Wall 2:
 Interior Floor 1:
 Interior Floor 2:
 Interior Floor 3:
 Heat Type:
 Bedrooms:
 Total Rooms:
 Full Bath:
 Full Bath Grade:
 Half Bath:
 Half Bath Grade:
 Extra Features:
 Extra Feature Grade:
 Split Level:
 Split Foyer:
 Fireplaces:
 Chimneys:
 Fireplace Opening:
 Basement Type:
 Basement Area:
 Living Area:
 Building #: 2 of 2
 Section: 1 of 1
 Basement Garage



The building number is located in the upper right hand corner. Use the arrows to switch between buildings.

Building #: 2 of 2
 Basement Garage

7. Select **Depreciation** from the **Building Information** sub menu, located in the navigation tree on the left hand side of the screen.

Building Information
 Construction Details
 Depreciation
 Condo Main Elements
 Associated Condo
 Extra Features
 Building Permits
 Fires
 Visit History
 Building Notes
 Photos
 Sketch

8. The **Depreciation** screen will open.

Building #: 2 of 2 Section: 1 of 1

Depreciation Title
Section Level Depreciation

Year Built:

Effective Year Built: ☒ Ovr EYB

Functional Obsol:

Economic Obsol:

Condition:

Percent Complete:

Depreciation Code:

Remodel Rating:

Year Remodeled:

Override Value:

Section Summary

Group:

Base Rate: \$0

EFF Base Rate: \$120.00

Net Other Adj: \$0.00

Living Area:

Effective Area

Rm:

Blldg % Good: 80

RCNLD: \$0

Code Description Gross Living EFF Area

Value	Type	Reason Code	Date	Id	Comment
% Good	Remodel		1/1/2010	101	
Misc. Improve	Remodel		1/1/2010	101	
Cost To Cure	Remodel		1/1/2010	101	

Override Appraised: Override Assessed: Override ID:

9. Enter **Year Built** and **Depreciation Code**.

Depreciation Title
Section Level Depreciation

Year Built: 2010

Effective Year Built: 2010 ☒ Ovr EYB

Functional Obsol:

Economic Obsol:

Condition:

Percent Complete:

Depreciation Code: A: Average

Remodel Rating:

Year Remodeled:

Override Value:

Override Initials:

Value	Type	Reason
% Good	Remodel	



You can enter the **Depreciation Code** in two ways:

- Type the code or value in the **Depreciation Code** field.
- Use the pick list to select from existing codes in the database. This can be accessed either by clicking the drop down arrow on the **Depreciation Code** field or by clicking the field and hit the **F6** key.



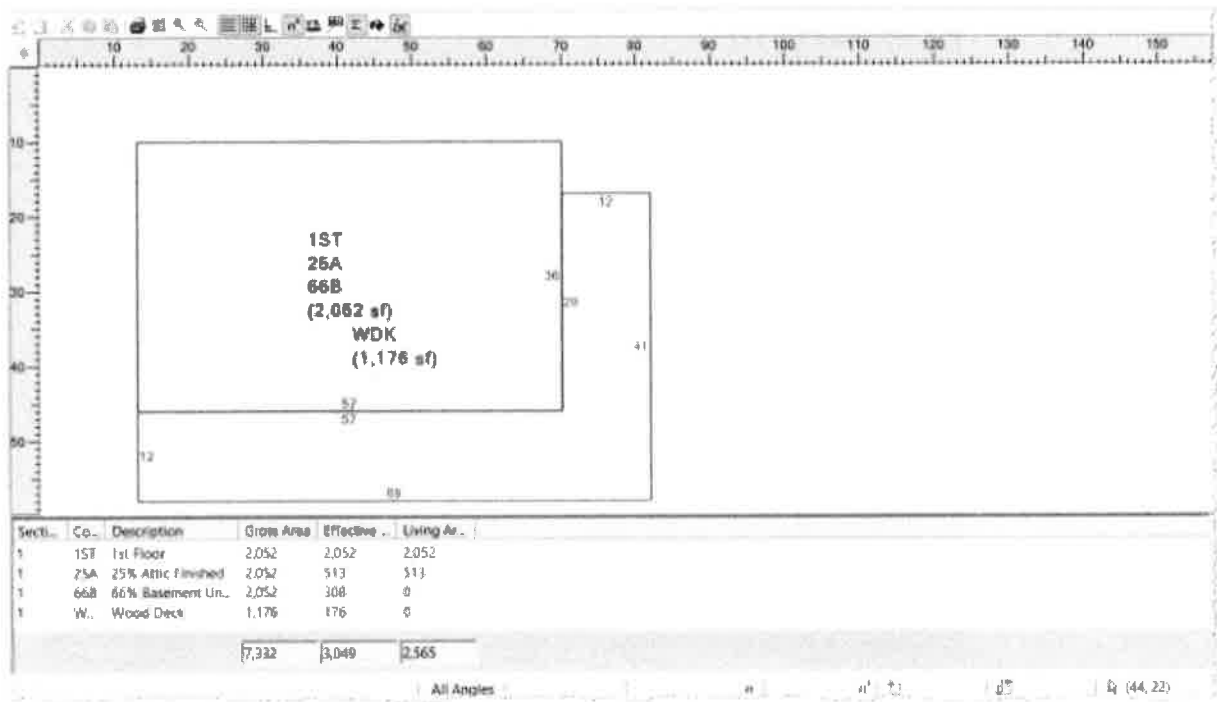
If the building is under construction, enter the code in **Condition** (commonly labeled **Status**) and enter a **Percent Complete**.


Depreciation Title		
Section Level Depreciation		
Year Built	2010	
Effective Year Built	2010	<input checked="" type="checkbox"/> Ovr EYB
Functional Obsol		
Economic Obsol		
Condition	UC: Under Consti	
Percent Complete	85	
Depreciation Code	A: Average	<input type="checkbox"/>
Remodel Rating		<input type="checkbox"/>
Year Remodeled		
Override Value		Override Initials
		<input type="checkbox"/>
	Value	Type Reason

10. Select **Sketch** from the **Building Information** Sub Menu, located in the navigation tree on the left hand side of the screen.


Building Information	
Construction Details	
Depreciation	
Condo Main Elements	
Associated Condos	
Extra Features	
Building Permits	
Fires	
Visit History	
Building Notes	
Photos	
Sketch	
Outbuilding	

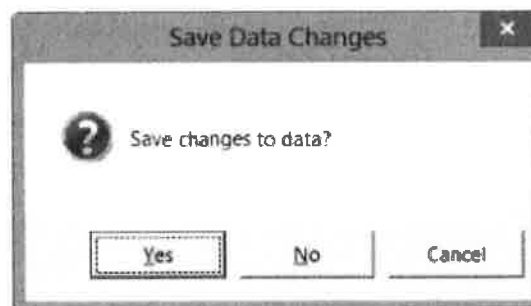
11. Enter the **Sketch** for building two. See **Sketching Instructions** for directions.



12. Once all information has been inputted click on the **save changes icon**  or the **F2 key** to save your changes.



-  If you pressed the **F2 key**, Vision will ask if you want to save changes. Click **Yes**.





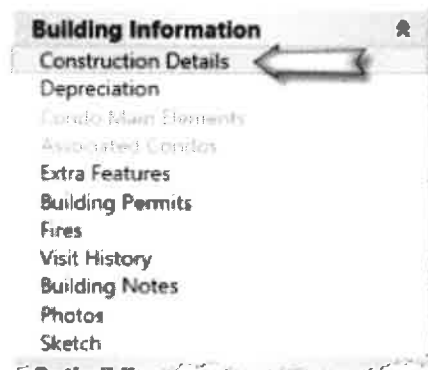
How to Delete a Building from a Parcel with Multiple Buildings

The purpose of this document is to assist the user in removing a building from a parcel that contains multiple buildings.



Please note these steps are not intended for removing the primary building from a parcel.

1. Select the parcel from which you want to **delete a building**.
2. Select **Construction Details** from the **Building Information** sub menu, located in the tree on the left hand side of the screen.



3. This will bring you to the **Construction Details Screen**.

Building #		Section	
Model	01: Residential	Fuel Type 1	00: Coal
Style	10: Townhouse	Fuel Type 2	
Grade	06: VERY GOOD	AC Type	00: No Central Air
Stories		Bedrooms	
Foundation Type 1	01: Concrete	Total Rooms	
Foundation Type 2	01: Cinderblock	Full Baths	
Exterior Wall 1	01: Brick Base	Full Bath Grade	
Exterior Wall 2	01: Brick Base	Half Baths	
Exterior Wall 3	ASB: Asbestos	Half Bath Grade	
Overall Condition	06: Very Good	Extra Features	
Roof Structure 1	10: Dome	Extra Feature Grade	
Roof Cover 1	ASB: Asbestos	Split Level	
Roof Cover 2		Split Foyer	
Interior Wall 1	SR: Sheet Rock	Fireplaces	
Interior Wall 2		Chimneys	
Interior Floor 1	HR: Hardwood	Fireplace Opening	
Interior Floor 2		Basement Type	
Interior Floor 3		Basement Area	
Heat Type	00: No Central Heat	Living Area	

- Select the **Building** to be deleted. On the top right of the screen use the arrows in the **Building #** section to change the selected **Building** to the one desired for deletion.

Building #	Section
2 of 2	1 of 2

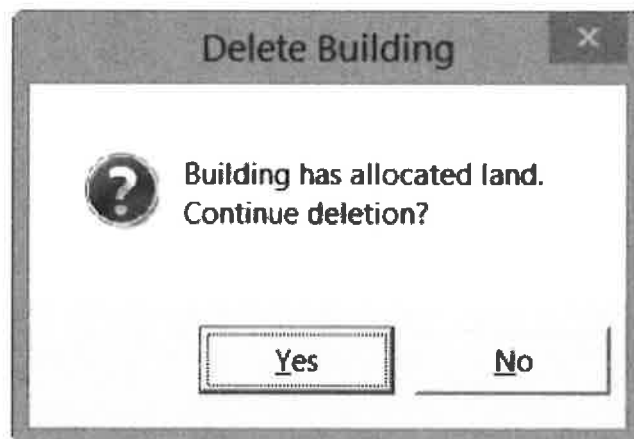
- Once the **Building Number** has been Selected, Click the **X** to delete.

Building #	Section
2 of 2	1 of 2
Basement Gara	

- A **Delete Building** window will appear requesting confirmation that the selected building number is to be deleted. Click **Yes** if this is correct.




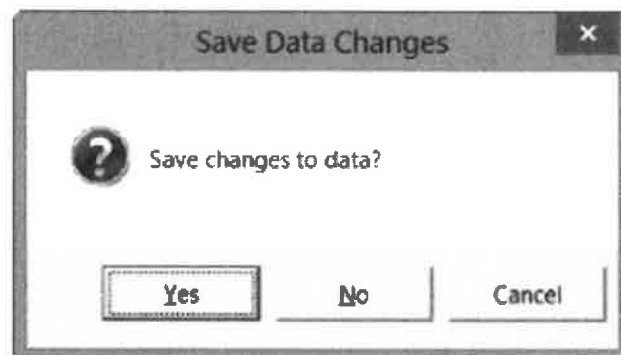
7. If the **Building** is allocated a Land Area, you will be prompted to continue the deletion. Click **Yes** to continue.



8. Click on the **Save Changes** icon  or the **F2** key to save your changes.



-  If you pressed the **F2** key, Vision will ask if you want to save changes. Click **Yes**.



If there is **Land Allocated** to the **Building** that you want to keep on the parcel, you will want to create an additional **Land Line** for the parcel first. For instructions, please see **Adding a New Land Line** documentation.



Although this **Building** is no longer in the database, it is not completely removed. This **Building** will now be located in the **Building Recycle Bin** located under the **Utilities Menu > Utilities > Recycle Bin Function > View Building Recycle Bin** at the top of the screen. It will be available for restoration to the database in case of an accidental deletion.



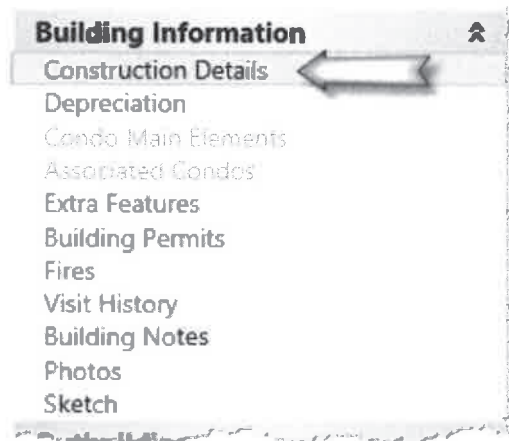
© 2019 Vision Government Solutions Inc. All Rights Reserved.
1 Cabot Rd. Hudson, MA 01749 (800) 628-1013 www.vgsi.com
Equal Opportunity Employer/Affirmative Action Employer



How to Add a Section to a Parcel

The purpose of this document is to assist the user in adding a new section to an existing building on a parcel.

1. Select the parcel to which the new **Section** will be added.
2. Select **Construction Details** from the tree on the left hand side of the screen.



1. This will open the **Construction Detail** Screen. This screen will appear different depending on what model (Residential, Commercial, Condo, or Condo Main) the parcel is and the fields your jurisdiction enabled.

Building #: 1 of 1 Section: 1 of 1

Basement Garage

Model	01 Residential	Fuel Type 1	CD Coal
Style	NR Townhouse	Fuel Type 2	
Grade	05 VERY GOOD	Air Type	00 No Central Air
Stories		Bedrooms	
Foundation Type 1	CN Concrete	Total Rooms	
Foundation Type 2	CB Cinderblock	Full Baths	
Exterior Wall 1	BB Brick Base	Full Bath Grade	
Exterior Wall 2	BB Brick Base	Half Baths	
Exterior Wall 3	ASB Astoria	Half Bath Grade	
Overall Condition	05 Very Good	Extra Features	
Roof Structure 1	RD Dome	Extra Feature Grade	
Roof Cover 1	AM Metal	Split Level	
Roof Cover 2		Split Foyer	
Interior Wall 1	SR Sheet Rock	Fireplaces	
Interior Wall 2		Chimneys	
Interior Floor 1	HWH Hardwood	Fireplace Opening	
Interior Floor 2		Basement Type	
Interior Floor 3		Basement Area	
Heat Type	00 No Central Heat	Living Area	

3. Click on the **Section Add New**  icon in the top right corner of the screen.

Building #: 1 of 2 Section: 1 of 1

Basement Garage



An **Add Section** prompt will appear.

- Clicking **Yes** will copy data from one of the building's existing **Sections**.
- Clicking **No** will require all construction information to be manually populated.

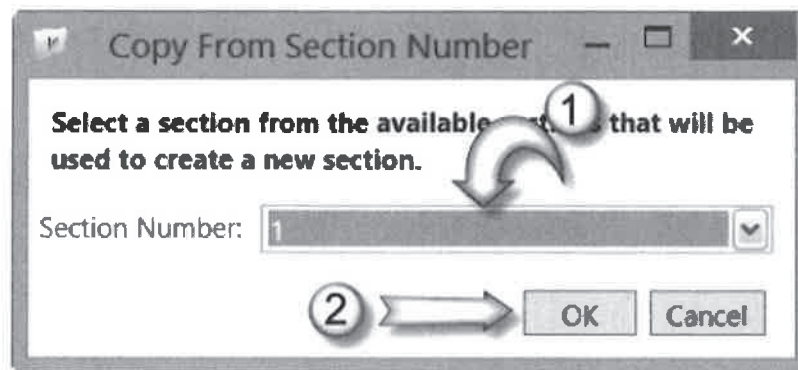
Add Section

Do you want to copy the data from an existing section?

Yes No Cancel



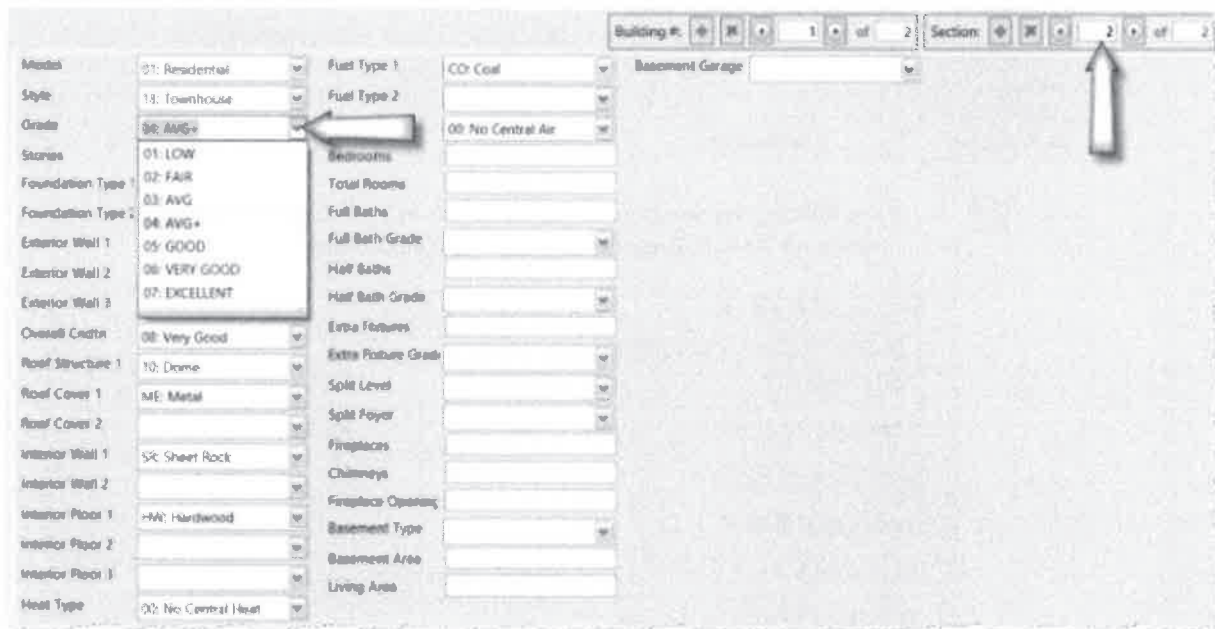
If you opt to copy data from an existing **Section**, enter the **Section Number** desired and click **OK**.



4. The **Construction Detail** screen will now have the newly created building **Section**. Change between building **Sections** using the arrows in the **Section** field.



5. Modify any **Construction Detail** for your new **Section**.



Very Important: Fields that appear gray on additional **Sections** are set to “Only Allow Edit On Section 1.” Some of these fields may be set to affect value, such as bathrooms. If you chose to copy data from **Section 1**, these fields will become populated too. To allow editing on these fields, see the **Construction Detail** section in **Table Maintenance**.

6. Select **Depreciation** from the tree on the left side of the screen.



7. Select your new building **Section** and make any necessary changes to **Depreciation**.

Building #: 1 of 2 Section: 2

Depreciation Title
Section Level Depreciation

Year Built: 2005
Effective Year Built: 2007 ☐ Ovr EYB

Functional Obsol:
Economic Obsol:
Condition: UC: Under Constr
Percent Complete: 85
Depreciation Code: G: Good
Remodel Rating:
Year Remodeled:
Override Value:
Override Initials:

Section Summary
Group: SIV
Base Rate: 50
Eff Base Rate: \$113.59
Net Other Adj: \$0.00
Living Area: 2565
Effective Area: 2049
Gross: \$345,328
Avg % Good: 95
NCILO: \$202,100

Code	Description	Gross Living	Eff Area

Value Type Reason Code Date Id Comment

Override Appraised: Override Assessed: Override ID:



If the building **Section** is under construction, enter the code in **Condition** (Commonly labeled **Status**) and enter a **Percent Complete**.

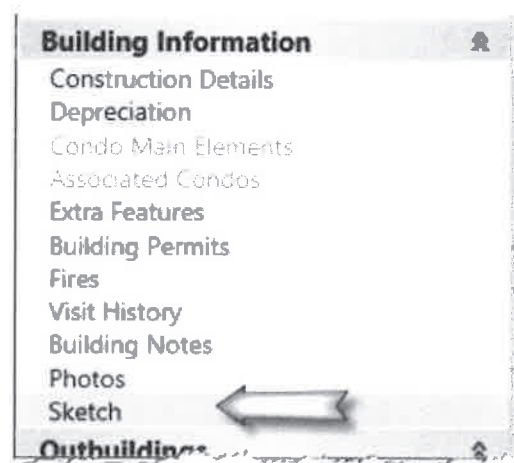
Depreciation Title
Section Level Depreciation

Year Built: 2010
Effective Year Built: 2010 ☒ Ovr EYB

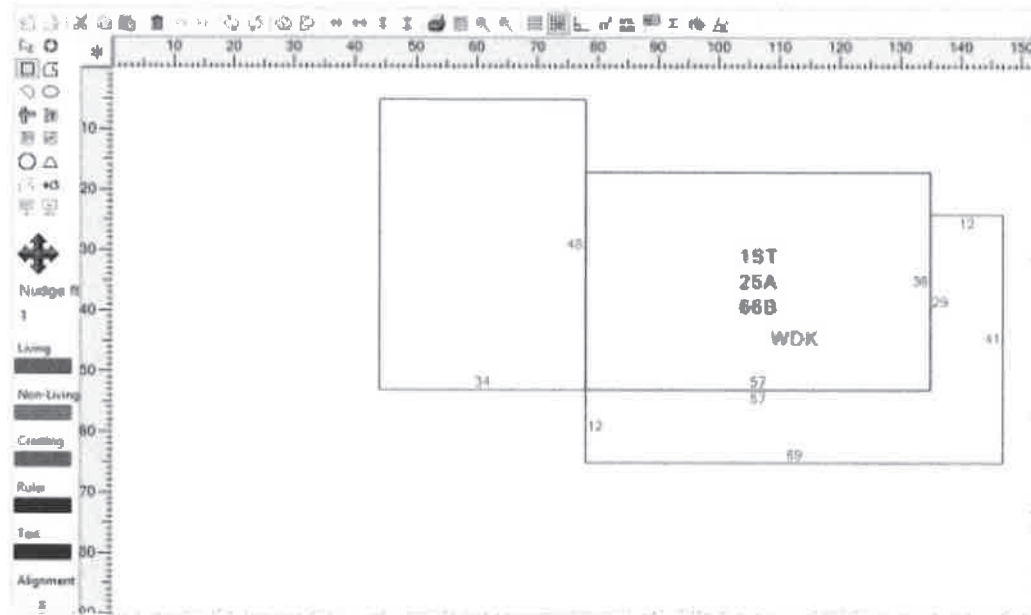
Functional Obsol:
Economic Obsol:
Condition: UC: Under Constr
Percent Complete: 85
Depreciation Code: A: Average
Remodel Rating:
Year Remodeled:
Override Value:
Override Initials:

Value Type Reason

8. Select **Sketch** from the **Building Information** submenu, located in the navigation tree on the left hand side of the screen.



9. In the **Sketch** screen, draw the new **Section**. See **Sketching Instructions** for directions.



10. After creating the shape for the new **Section**, assign the appropriate **subarea** codes in the **Rectangle Properties** screen by clicking on the code and selecting **Add**. Next, assign the shape to the appropriate **Section** number using the **Section ID** field.

Rectangle Properties

Format Sides Subareas

Available Codes		Current Sub Areas	
Co...	Description	Co...	Description
EQP	Equipment Building	1ST	1st Floor
FAT	Finished Attic-P/U @ 25...	FBM	Finished Basemen...
FBM	Finished Basement-P/...		
FEP	Finished Enclosed Porch		
FFR	Fast Food Restaurant		

Add >> << Remove

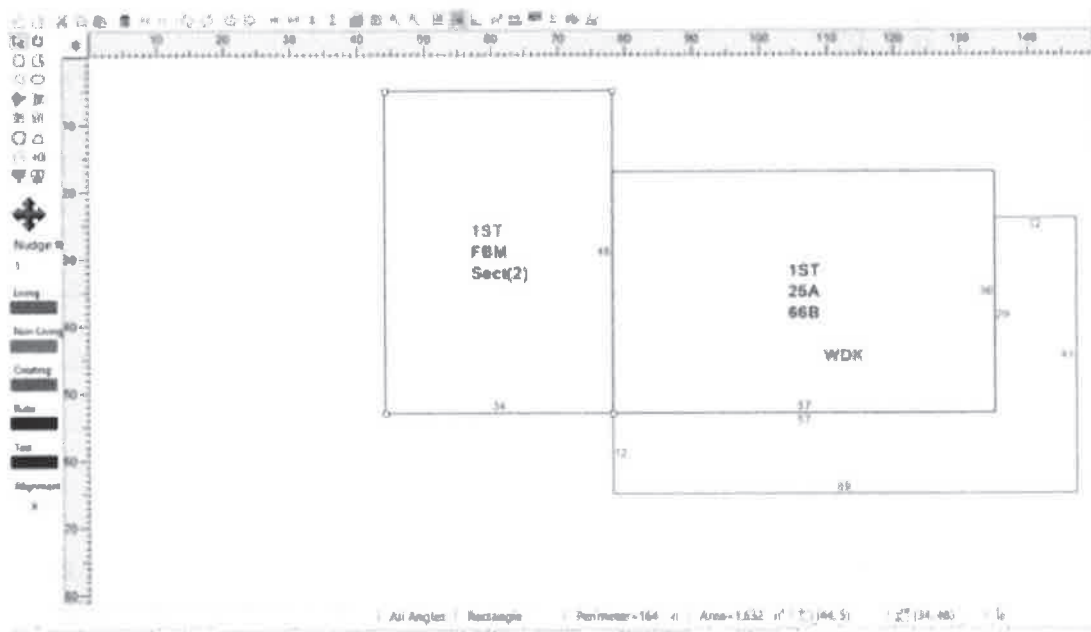
Selected Sub Areas: 1ST/F

Horizontal Alignment: Default Vertical Alignment: Default ☐ Detached Font...

Section ID: 2

OK Cancel

You will now see your new polygon with its **Section** number. **Section 1** polygons will not show a **Section** number.



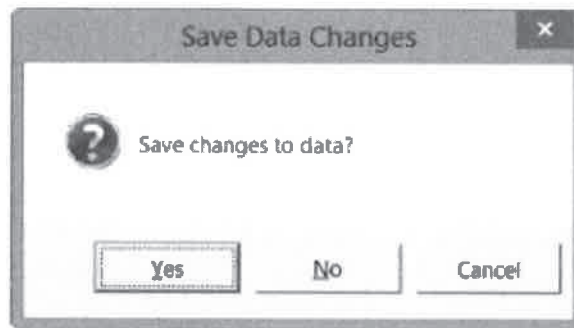
By viewing the **Sub Area Summary** (Σ on toolbar), you will see the Sub Area codes with a **Section** number next to it.

Secti...	Co...	Description	Gross Area	Effective ...	Living Ar...
1	25A	25% Attic Finished	2,052	513	513
1	66B	66% Basement Un...	2,052	308	0
2	1ST	1st Floor	1,632	1,632	1,632
2	FB...	Finished Basement...	1,632	408	1,469
			10,596	5,089	5,666

11. Click on the **save changes icon**  or the **F2 key** to save your changes.



-  If you pressed the **F2 key**, Vision will ask if you want to save changes. Click **Yes**.

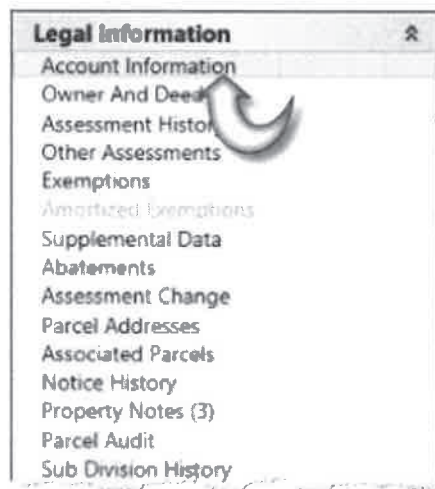




How to Change a Parcel Status (Active, Inactive and Future)

The purpose of this document is to assist the user in changing a parcel's status between the three states of Active, Inactive, and Future.

1. Select the parcel to be modified.
2. Select **Account Information** from the **Legal Information** sub menu, located in the tree on the left hand side of the screen.



3. This will open the **Account Information** screen

Account Information

MBLU 102 4 25 ☐ Edit Mblu Parcel Status A: Active

Account Number 100506002 W-P-B ☐ Owner Occupied Create Date 10/23/2014

Unit Unit Type

Property Location 1 MAIN ST Legal Area 43560

City/County/Zip ANYTOWN 01234 Primary Use 100R: SFD - Urban Res

State/Country MA PIN 100506002

Owners Name JOHN S SMITH

Building Name

Alt ID 100506002

Cross Street 1

Cross Street 2

☐ Visited

☐ Value Unfrozen

4. **Parcel Status** is indicated on the top right hand corner of the **Account Information** screen.

☐ Edit Mblu Parcel Status A: Active

☐ Owner Occupied Create Date 10/23/2014

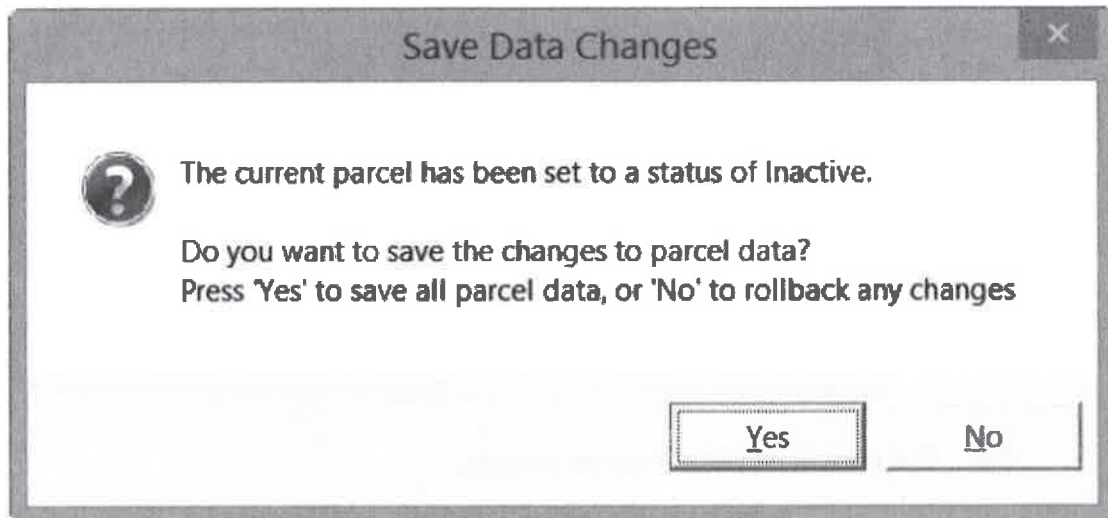
Legal Area 43560

Primary Use 100R: SFD - Urban Res

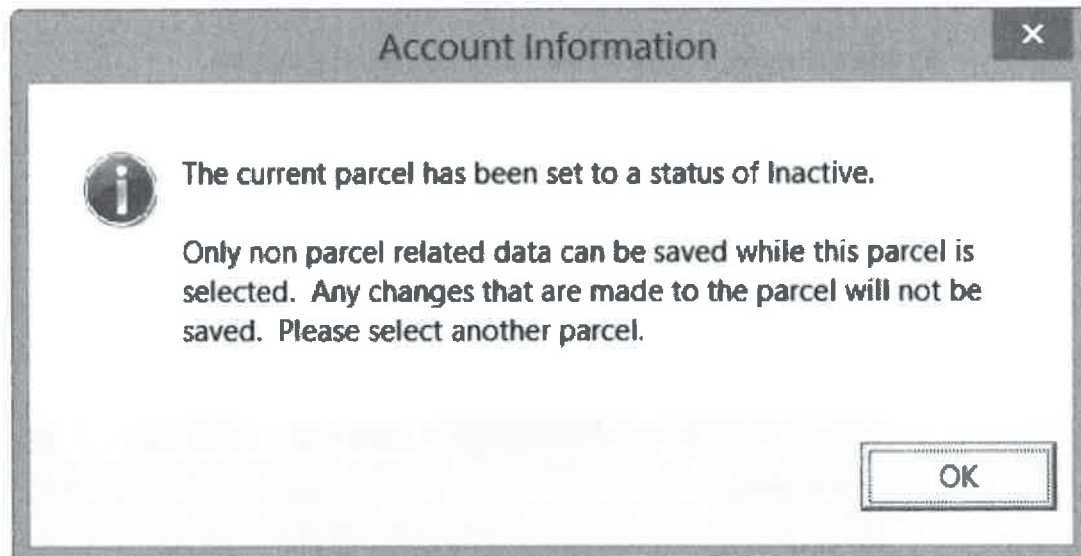
100506002

☐ Visited

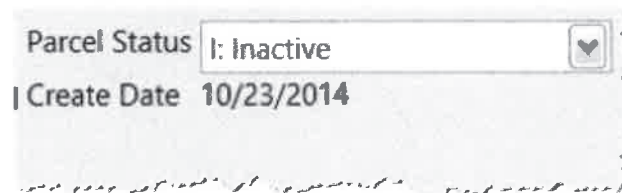
5. **Parcel Status** can be changed by clicking in the field and entering the status code of A, F, or I. You may also click the drop down to select the status code or press the **F6** key to activate the drop down.



8. Vision will inform you that the parcel is now inactive and no changes made to the parcel will be saved until the status is adjusted to either A - Active or F - Future.



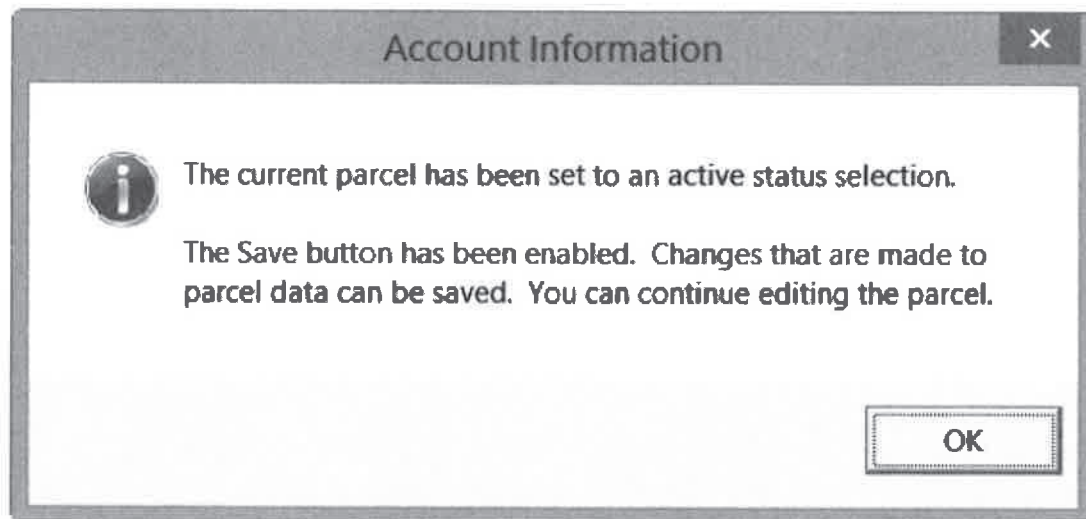
- The parcel will now be labeled as **Inactive**.



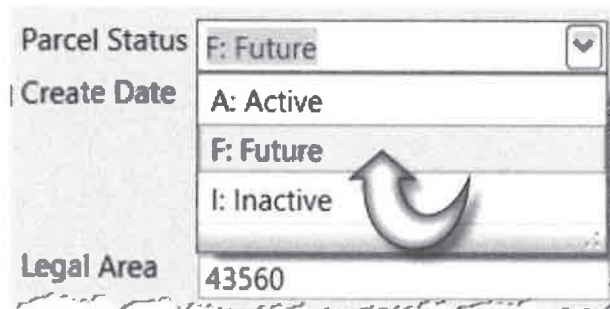
Note: Inactive parcels do not:

- By default print on **reports**.
- By default print as part of a batch of **printed cards**.
- **Recalc** as a single parcel or batch.

- **Extract to Comp Sales or Sales Analysis.**
 - **Extract** for billing.
 - Print **Cost, Land, or Regression** reports.
9. If you choose to change an **Inactive** parcel back to **Active** you will be prompted with the following dialog window. This window states that the parcel is now active and the save button is now enabled again so changes made can be saved.



10. You can also set the **Parcel Status** to **Future**. A parcel marked as **Future** will not affect the current values in the database. Entering parcels as **Future** allows the user to enter parcels intended for the next fiscal year which can be all changed to **Active** status using the **Utilities**. Please see the **Utilities** document **Make all Future parcels Active** for more information.



Note: Future parcels do not:

- By default print on **reports**.
- By default print as part of a batch of **printed cards**.
- **Recalc** as a part of a batch **Recalc**.
- **Extract to Comp Sales or Sales Analysis.**
- **Extract** for billing.



How to Make an Improved Parcel Vacant

The purpose of this document is to assist the user in changing a parcel from an improved parcel (a parcel containing a structure) to a vacant land parcel.

1. Select the improved parcel you intend to change to a **Vacant Parcel**.
2. Select **Classification & Land Information** from the **Classification & Land Information** sub menu, located in the tree on the left hand side of the screen.




3. The **Classification & Land Information** screen will open.

A screenshot of the 'Classification & Land Information' screen. The screen is divided into several sections. The top section, 'Property Features', contains fields for Utilities (01: Public Water, 02: Public Sewer, 00: N/A), Street (01: Paved Road, 05: Curb/Gutter, 00: N/A), Flood Plain (01: Flood Plain, 00: N/A), Easement (00: N/A), Topo (01: Hilly, 00: N/A), Soil Type (00: N/A), and Location (03: Arg). The middle section, 'Land Valuation Neighborhoods', contains fields for Sub Nbrd (A), On Region, Pocket Nbrd, and Z Contour. The bottom section, 'Land Factors', contains fields for Frontage (0), Depth (0), Sec Frontage (0), Perimeter (0), Gs Perimeter (0), and Lot Type (0). The bottom section, 'Building Classification And Land Use Valuation', contains a table with columns: Bldg #, Line #, Code, Description, Units, Unit Type, Appraised, Assessed, Acre Discount, Zone, Land Type, and Land Type Desc. The table has one row with the following data: Bldg # 1, Line # 1, Code 100R, Description SPD - Urban Res, Units 43,380, Unit Type SF, Appraised \$33,590.00, Assessed \$33,600.00, Acre Discount, Zone ZONE A, Land Type, and Land Type Desc. Below the table, there are fields for Land Acres (1), Appraised (\$33,590.00), and a button labeled 'Edit Lines'.

4. Click on **Edit Lines**.

Building Classification And Land Line Valuation											
Bldg #	Line #	Code	Description	Units	Unit Type	Appraised	Assessed	Acre Discount	Zone	Land Type	Land Type Desc
	1	100R	SFD - Urban Res	43,560	SF	\$33,590.00	\$33,600.00		ZONE A		

Land Acres	1	Appraised	\$33,590.00
Mix Use	100R	SFD - Urban Res	100 R



5. The **Use Code** must be changed to represent a **Vacant Use**.



The code can be changed in two ways.

- Type the **Vacant Use** code into the **Use Code** field.
- Use the drop down menu either by clicking on the drop down arrow on the **Use Code** field or click on the field and hit the **F6** key.

Land Data

Bldg #	Line #	Use Code*	Zoning	District	Frontage	Depth	Units	Unit Type
1	1	00R: SFD - Urban Res						

Special Calcs

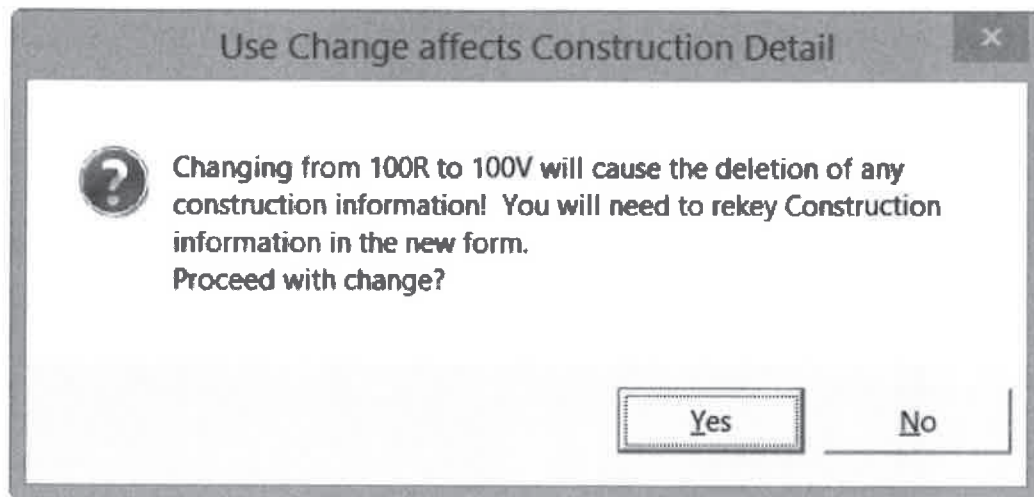
Notes

▼

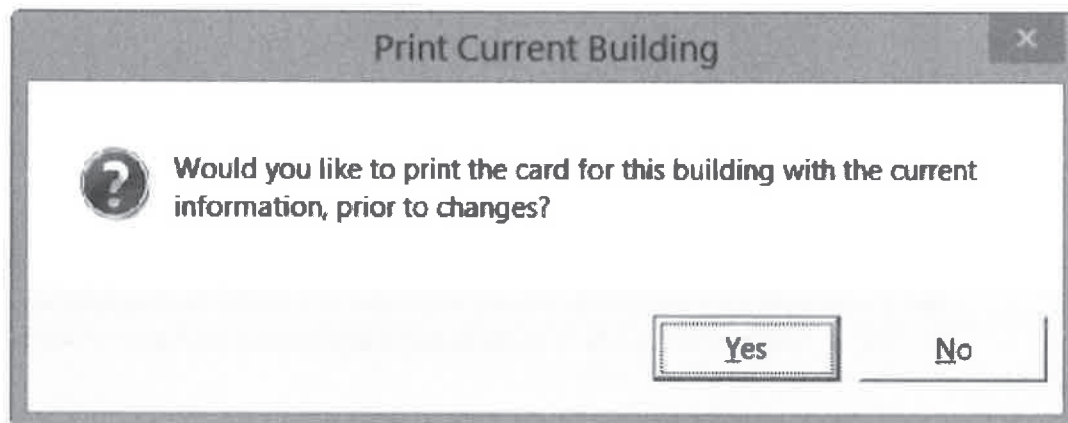
▼

▼

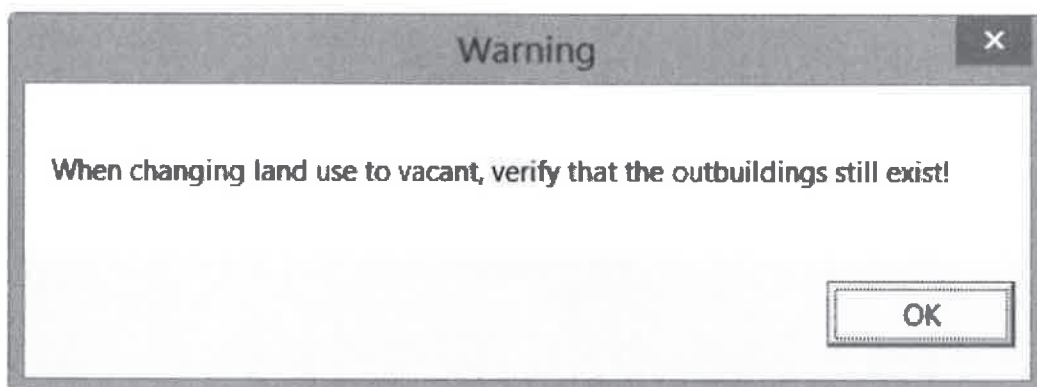
6. Once the **Use Code** has been changed, a **Use Change affects Construction Detail** prompt will appear, Select **Yes** to make the parcel vacant and remove the construction information.




7. Another **Print Current Building** prompt will appear. It is recommended that the card is printed for your records. Select **Yes** to Print the Card.



8. If the parcel has an Outbuilding/Yard Item, a **Warning** prompt will appear, click **OK** to continue.



-  Verify the Outbuilding exists. If not, see **How to Delete an Outbuilding**.
9. Click **Close** on the **Land Details** screen.

Land Details

Bldg # 1 Land # 1 Site Index 5: Reside

Use Code* SFD - Urban Vacant Land Type

Zoning Unit Price 0.77

District Influence Factor 1.0000000

Frontage Condition Factor 1.00

Depth Nblnd

Units 43560.000 Nblnd Adj 1.000

Unit Type SF: Square Feet Size Adjust 1.0000

Special Cals

Notes

Special Use 0 100.00 %

☐ Override Appraised Land Value

☐ Override Assessed Land Line Value

Totals

Appraised 33500

Assessed 500

Next Add Delete Close

10. Click on **Construction Details** from the **Building Information** sub menu, located in the tree on the left hand side of the screen.



11. Change the **Style** and **Model** to represent a **Vacant Parcel**.

Model	00: Vacant	▼	Type 1
Style	99: Vacant Land	▼	Type 2
Grade		▼	Ac Type
Stories			Bedrooms
Foundation Type 1		▼	Total Rooms
Foundation Type 2		▼	Full Baths
Exterior Wall 1		▼	Full Bath Grade
			Half Baths

 The **Model** and **Style** can be entered in two ways.

- Type the **Vacant** code into the **Model** and **Style** field.
- Use the drop down menu either by clicking on the drop down arrow on **Model** or **Style** field or click on the field and hit the **F6** key.

12. Click on the **save changes icon**  or the **F2** key to save your changes.



 If you pressed the **F2** key, Vision will ask if you want to save changes. Click Yes.

