

New Functionality

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Integrations



Marshall & Swift — Detail Report

- Detail report now displays the following
 - QuickRefID and owner name on all reports
 - Component code and description on MVP reports

Marshall & Swift Estimate Details			
Property Number : 11878			
QuickRefID : R819122			
TaxYear : 2015			
Legal Description : Pool Blk 8 Lt 8			
Owner : Default Owner			
Cost Date : 2014-12-01			
Estimate Date : 2014-12-01			
	Quantity	Unit Cost	Cost New
Section 1: Main Home			
Basic Residence			
Exterior Walls			
118 - Frame, Cement Fiber Siding	2,072	45.67	94,628
Roofing			
208 - Composition Shingle	2,072	1.91	3,958
Subfloor			
622 - Raised Subfloor	2,072	6.72	13,924
Floor Cover			
402 - Automatic Floor Cover Allowance	2,072	2.38	4,931
Heating/Cooling			
381 - Refrigerated Air with Ducts	2,072	3.39	7,024
Plumbing Fixtures			

Marshall & Swift — Codes

- Marshall & Swift code updater now updates from both the legacy black box and MVP engine
 - The codes are merged with MVP taking precedence
 - More information is pulled and available for UI
- Marshall & Swift input fields can take advantage of new cache information for filtering
 - Simplifies component input and finding
 - List goes from 1000+ codes to about 200
 - More fields are filterable
 - Residence type and section type
 - MVP tooltips are displayed where possible

External Web Applications (LEAP)

- Added ability to link to external applications, passing Orion information to them
 - Property ID
 - Situs address
 - Instrument number
 - Custom fields
 - Exemptions, transfers, appeals

Modify External Applications

Show this code for Appraisal

System-Wide Code and Description

Code: FIDLAR

Description: Fidlar integration

System-Wide Effective Information

Effective Date: [Calendar Icon]

Obsolete Date: [Calendar Icon]

System-Wide External Applications Behavior

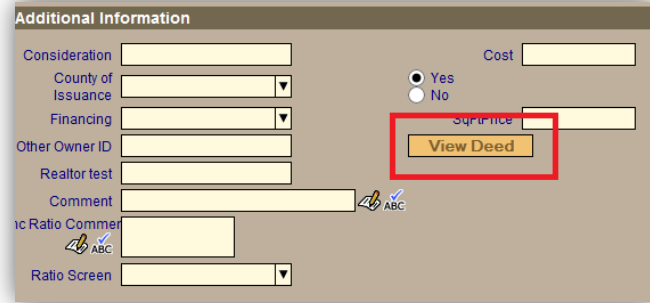
URL: http://Orion-App/Integrations/Fidlar2/Fidlar.html?name={InstrNum}&user={CurrentUs}

More Info



Save Exit

External Web Applications (LEAP) – Example 1

- Button can be added to a transfer that links to deeds website to pull up site



The screenshot shows a web form titled "Additional Information" with various input fields and a "View Deed" button. The fields include:

- Consideration:
- County of Issuance:
- Financing:
- Other Owner ID:
- Realtor test:
- Comment: 
- Ratio Comment: 
- Ratio Screen:
- Cost:
- Yes/No radio buttons: Yes, No
- Supplement:

The "View Deed" button is highlighted with a red rectangular box.



InterLine



Lancaster County
Register of Deeds

On-Line Deeds Search

External Web Applications (LEAP) – Example 2

- With latitude and longitude stored on the appraisal tab, a Google Maps button can be created to get the streets view

Separate Map Coords (WGS84)

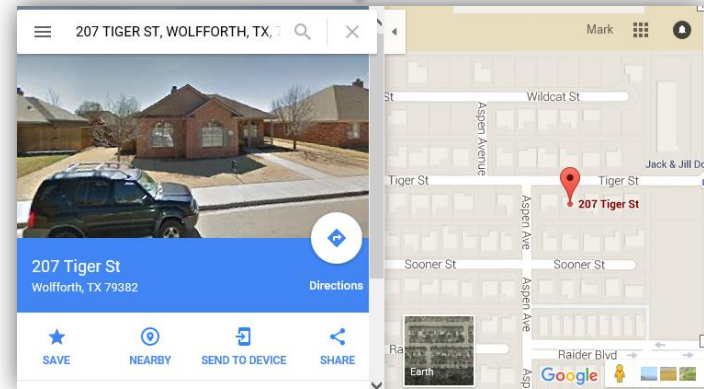
Lat

Lon

Price

My Number

Google Maps



External Web Applications (LEAP) – Limits

- Destination site must be accessible by the local machine
 - If you can open Internet Explorer to view it on the same machine, it'll work
- Any data sent to external application is sent via its URL
 - In developer speak, we don't POST or do any sort of REST
- Besides custom fields, list is hardcoded
 - If there's a data element missing, we'll need to add it first through a patch

General Enhancements



Forms Merge

- Server Side forms is now available
 - Word Macros work when not used in Appeal Packets
 - Prompt Tokens don't prompt
 - Most of these were Tax tokens
- New Token for Date
 - Supports using the FORMAT parameter to determine output
- Word 64-bit is now compatible
- Server Side Forms is not enable by default
 - There is an System Administration setting to toggle
 - **EnableClientSideFormsMerging**

List Manager – Property List Criteria

The screenshot shows a 'Select Properties' modal window for the tax year 2016. It is divided into several sections:

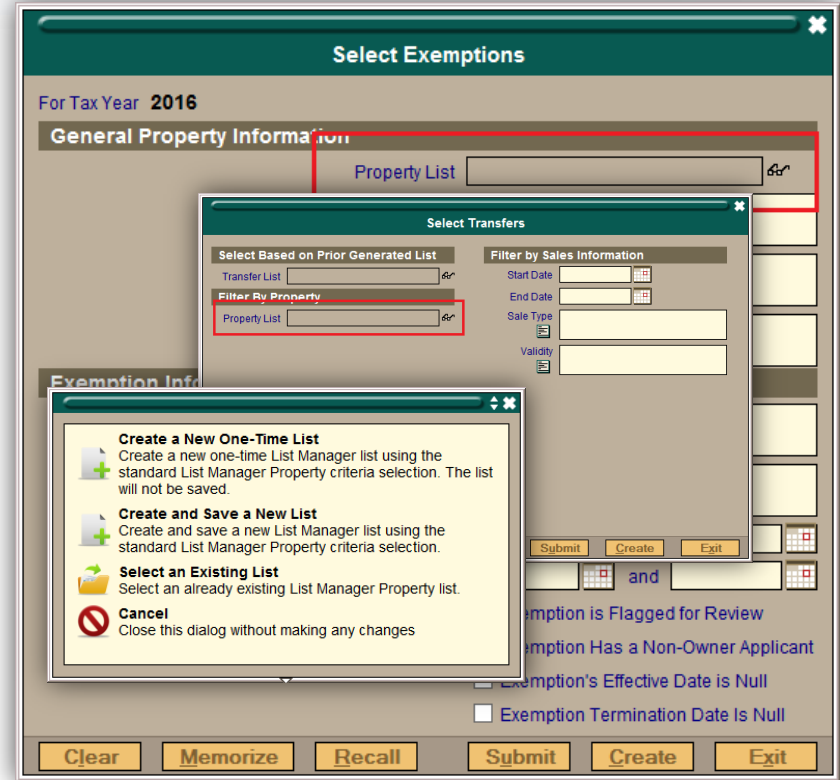
- Property Identifiers:** Includes fields for Property IDs, From Property ID, To Property ID, Lease ID, Map ID, QuickRef IDs, From Quick-Ref ID, To Quick-Ref ID, Owner ID, and Owner Legacy ID. Red boxes highlight the Property IDs and QuickRef IDs fields, with blue arrows pointing to them from the text on the right.
- Situs Address Information:** Includes Location Name, Situs Street, and Situs City.
- Legal Description Information:** Includes Abstract, Subdivision, and Minimum.
- General Property Information:** Includes Property Type, Property Status, Taxing Unit, Taxing Unit Group, and Neighborhood.
- Additional Options:** Includes MH Serial #, MH Label #, Section, Township, Range, Lock Reason, and Property Flag.

At the bottom of the modal are buttons for Clear, Memorize, Recall, Submit, Create, and Exit.

- Two new Filters have been added to property list criteria modal
 - Property IDs
 - QuickRef IDs
- Both support copy and pasting a list of properties similar to the appeal link and other places in the product

List Manager – Other List Criteria

- Exemption and Ownership Transfer list criteria modals now support dynamic list creation for the property list filter



CRS Link Refresh

- The CRS link refresh now support 64-bit version of Access
 - It's finally here!

Custom Fields

- Custom Fields in Appeals, Transfers, and Exemptions now display custom tooltips
 - Just like on Appraisal tab!

The screenshot displays a software interface titled "Additional Information". On the left, under "Appeal Values", there are four input fields: "Date" (with a calendar icon), "Class", "Class", and "Class". On the right, there is a dropdown menu labeled "Empty List" with a downward arrow. Below it are three rows of "Value" input fields. A tooltip is visible over the first "Value" field, containing the text "Empty List", "Reporting Name : EmptyList", and "Original Value :".

Appeal Enhancements



Appeal Packets

- Appeal Packets can now be created in Batch
 - Some Packet Items can't be included
 - Items that need a Property to select an item for
 - Sketches and Primary Photos work

The screenshot displays the Orion software interface for creating batch appeal packets. The main window is titled "Group Appeals" and contains a form with the following fields:

- List:** R62203-APP
- Packet Type:** Appeal Packet
- Output Type:** Single file
- Begin new packets on an odd page

Buttons for "Clear", "Memorize", and "Recall" are located at the top right of the form. A blue arrow points to the "Group Appeals" menu item in the left sidebar.

Scheduling

- Block out times and dates have been merged
 - You can now schedule one off block outs
 - It's more like a real calendaring system
- Closed appeals don't retain their time slots

The screenshot shows two overlapping windows from a software application. The top window is titled 'Modify Appeal Hearing Calendar' and contains the following details:

- Calendar Details:** Tax Year: 2016, Calendar Name: Test Calendar 2016, Applies to Days: Friday; Monday; Thursday; Tuesday; Wednesday. A 'Close Calendar' button is visible.

The bottom window is titled 'View Appeal Hearing Calendars' and displays a table of calendars. The table has the following columns: Calendar Name, Location, Start Date, End Date, and Hrg. Officer/Board. A blue arrow points to the 'Test Calendar 2016' row.

Calendar Name	Location	Start Date	End Date	Hrg. Officer/Board
Test Calendar - Cattle Call	BOARD ROOM A-10	02/01/2016	03/31/2016	
Test Calendar 2016	ROOM A-10	02/01/2016	04/15/2016	

Below the table, there are filtering criteria: Appeal Levels (Formal; Informal; INQUIRY-PHONE) and Property Types (Auto; Mobile Home; Mineral; Personal). At the bottom, there are buttons for 'Copy Calendar', 'Save', and 'Exit'.

Appraisal/ Calculation Enhancements



Calculation Reports

- Batch calculation reports have been tweaked
 - Errors are now first
 - No user options to change order

Batch Calculation Report					
Tax Year: 2012	Calc Type: CANA	Total Properties: 25919	Total Calculated: 25911	Total Errors: 8	Total Skipped: 0
Batch: 2/9/2012 5:00:08 PM					
Property Detail	User Text	System Text			
Property ID: 085-099-32-0-00-02-004-00-0	QuickRef ID: R21296	Error Code: 0	Error Severity: 0	/TAGERRORCLS><LOGREQ>-1</LOGREQ><LOGCOMP>-1</LOGCOMP><FETCHREQ>0</FETCHREQ><FETCHCOMP>0</FETCHCOMP><DISPLAYCAT><FATAL>-1</DISPLAYCAT><FATAL>-1</FATAL><REPLSTRS></REPLSTRS><DISPLAYCAT>0</DISPLAYCAT><SEVERITY>/SEVERITY</ERROR></ERRORSTREAM>	
Property ID: 085-136-24-0-00-01-007-00-0	QuickRef ID: R23603	Error Code: 0	Error Severity: 0	Error Message: Basement Finish Area Greater Than Basement Area Field:	
Property ID: 085-137-26-0-00-00-003-01-0	QuickRef ID: R23643	Error Code: 0	Error Severity: 0	Error Message: Garage Finish Area Greater Than Garage Area Field:	
Property ID: 085-011-12-0-00-00-005-00-0	QuickRef ID: R16	Error Code: 0	Error Severity: 0	Warning Message: 1 story house with Upper floor Pct pctupper Warning Field:	

Calculation Reports

Property Calculation Breakdown Report

MIGKANSAS

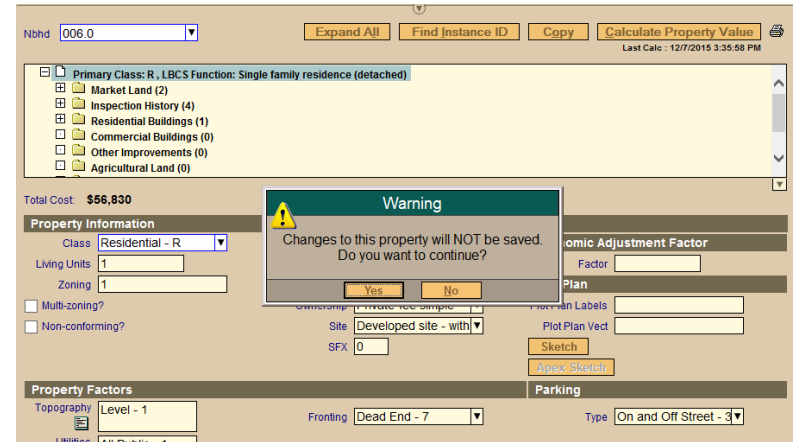
Quick Ref ID: **0000** Tax Year: 2016
 Property Number: **007-000-000-000000000** Owner(s): **CONCRETE HOLDING PARTNERS L**
 Legal Description: **CLAYTON SUBDIVISION, 600 1ST AVE, ACRES 2.3, LOT 1**

Property Page (proplevel)	
Variable	Value
CamaCalcDateyyyymmdd	20151102
CDGVer	2012.1112012.1142012. 1172012.1192013.1222013. 1232013.1242013.1252013. 1262013.1282013.1292016. 1722016.173
classBldg	R,197100.0;C,460.0
classIncome	R,573200.0
classLand	R,28100.0
classLandResid	Not Calculated
classNewCon	R,0.0;C,0
classOthImpts	Not Calculated
classVar	R,1;C,1
compsale	0
CurrentValue	225660
dataComBldg	Count:4, RCNLD:\$192130
dataLand	AgAcres:0.00 MktAcres:2.30 SqFt:100188 TotLandVal:\$28100
dataMfgHome	Not Calculated

- The Calculation Breakdown report has been modified to sort the variables by Name for each CalcDefGroup
 - It used to be creation order

Appraisal Tab

- We've found the cause of a Property believing a change has been made to the Appraisal tab when none has
 - Who wasn't annoyed by this?



Cost Valuation Report

- We've moved the following criteria:
 - Neighborhood From
 - Neighborhood To
 - Property ID From
 - Property ID To
 - QuickRef ID From
 - QuickRef ID To
- The Property List parameter allows creation of ListManager lists on the fly

The screenshot shows a web application window titled "Cost Valuation Report" with a yellow "Appraisal" label in the top right corner. A warning message states: "Important -- Generating this report will not calculate parcel cost or income values." Below this are three buttons: "Clear", "Memorize", and "Recall". The form contains several input fields:

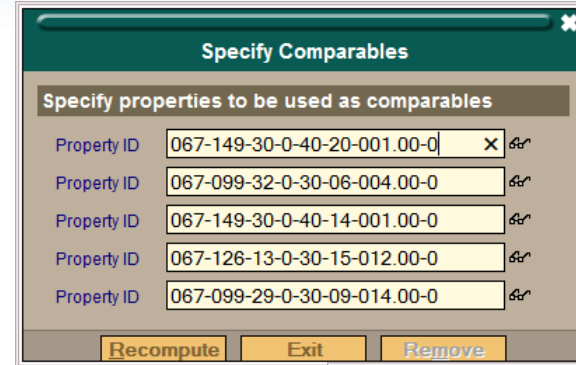
- Location: A dropdown menu set to "Appraisal".
- Tax Year: A dropdown menu set to "2016".
- Property Type: A dropdown menu with options: "Agricultural Use; Commercial & Industrial; Exempt; Farm Homesite; Not for Profit; Other; Personal".
- Property ID PIN's: A text input field containing "007-044-17-0-40-05-004-00-0".
- Property List: A text input field with a small "dr" icon to its right. This field is highlighted with a red rectangular box.
- QuickRef ID's: A text input field.
- NBHDs: A text input field with a list icon to its right.
- Subdivision: A text input field with a list icon to its right.
- Abstract: A text input field with a list icon to its right.
- Condominium: A text input field (partially visible).

Comparable Sales Enhancements



User Comparable Sales

- Multiple enhancements made to these tiny modals
 - **Remove** button added to revert User selections to the original system select
 - Properties are repopulated if you want to just alter a single selection
 - You can search by Properties to find a specific sale

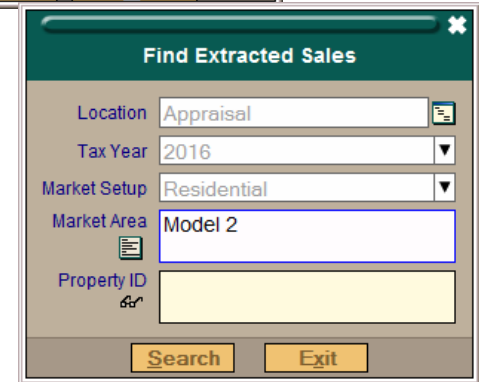


Specify Comparables

Specify properties to be used as comparables

Property ID	067-149-30-0-40-20-001.00-0	X	↻
Property ID	067-099-32-0-30-06-004.00-0		↻
Property ID	067-149-30-0-40-14-001.00-0		↻
Property ID	067-126-13-0-30-15-012.00-0		↻
Property ID	067-099-29-0-30-09-014.00-0		↻

Recompute Exit Remove



Find Extracted Sales

Location Appraisal

Tax Year 2016

Market Setup Residential

Market Area Model 2

Property ID

Search Exit

Sales Ratio Report

- Can now run the report by Market Area
 - All other criteria on the right side is disabled
 - Alternate Market Area Sales will be displayed with their Default Market Area

The screenshot shows the 'Sales Ratio Report' application window. The title bar includes 'Sales Ratio Report' and 'Appraisal'. The interface is divided into several sections:

- General** (with 'Memorize' and 'Recall' buttons):
 - Locations: Appraisal
 - Tax Year: 2016
 - Prop Type: Agricultural Use; Commercial & Industrial; Exempt; Farm
 - Comment: (empty)
 - Summary Only
- Sale Date Range and Validity**:
 - Start Date: 01/01/2000
 - End Date: 10/03/2016
 - Validity: Absolute Auction - 18; Change After Sale - 3; Construction
 - Sale Type: Building Only - 3; Land & Building - 2; Land Only - 1
- Select Value and Sale Price**:
 - Value: Final Value
 - Actual Sale Price Adjusted Sale Price
 - Trended: (empty)
- Property ID**:
 - From: 0670492901030007000
 - To: 0670492901030008000
 - List: (empty)
- Neighborhoods/Market Areas**:
 - Nbhd: (empty)
 - Mkt Area: Model 1
- Taxing Units**:
 - Group: (empty)
 - Unit: (empty)
 - Unit Type: (empty)
- Legal Description Elements**:
 - Abstract: (empty)

Infrastructure Enhancements



Input Controls

- A fix was added to prevent issues when copy/pasting from Word into input controls of Orion
 - Hopefully fixes Property load issues when a prior save copied a comment from Word
- The main culprits were the single line and multiline text boxes for comments

Windows Domain Authentication

Modify Windows Domain

Show this code for Appraisal

System-Wide Code and Description

Code: Tyler

Description: Tyler Tech Domain

System-Wide Effective Information

Effective Date: []

Obsolete Date: []

System-Wide Windows Domain Behavior

Require Password to Login:

Domain Address: TYLER

Enable Impersonation:

Domain Username: []

Domain Password: []

Save Exit

- Orion now supports domain authentication
 - Impersonation allows for authentication to remote domain
 - one User/One Password
- Required for tax clients signing onto cashiering tills using Windows Authentication

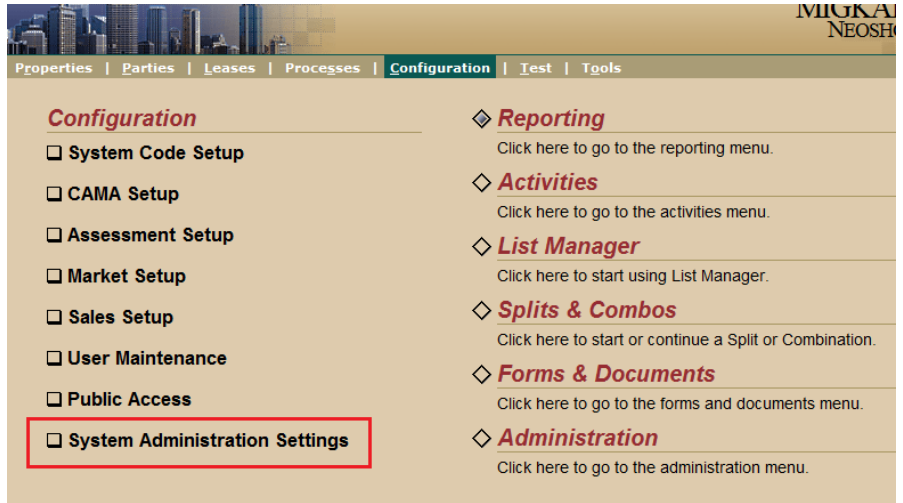
Code Cache



- Allows users to rebuild their entire code cache files
 - Perhaps Support said to delete them to troubleshoot something
 - Maybe a code input field is not listing any possible codes

System Administration Settings

- Moved to the **Configuration** tab on the Appraisal Home screen
 - Still needs to be in DeveloperMode to access



Questions

