

# Tips and Tricks 2

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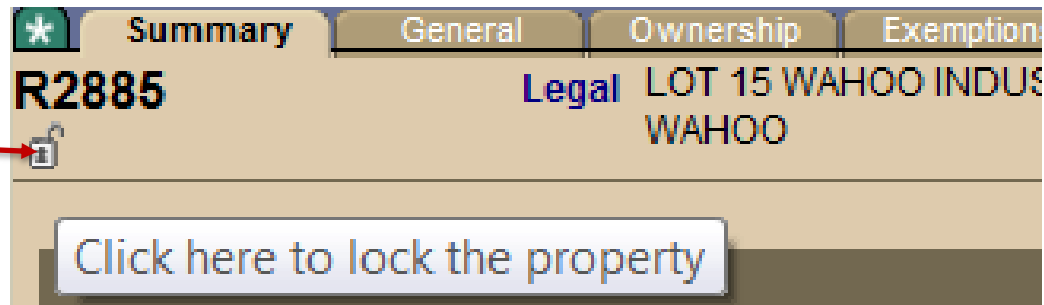


# Property Locks



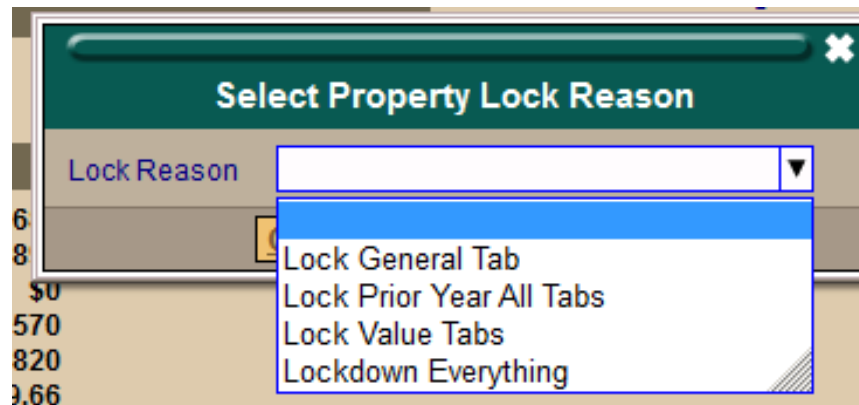
# Property Locks

- No recent changes and none pending
- Batch property locks was introduced in 2014
- The ability to lock and unlock individual properties was added in 2015



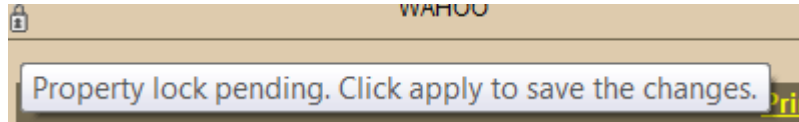
# Property Locks

- When locking a property, the user must select a lock reason. The same set of reason codes is used for batch and selective property locks.



# Property Locks

- The property must be saved for the lock to take affect.



- When the lock is applied, the lock icon changes from gray to yellow.



# Property Locks

- Batch Calculations respect property locks
  - Batch assessment calculations skip a property if the assessment tab is locked.
  - Batch CAMA calculations skip a property if either the appraisal tab or the final value tab is locked.

					<a href="#">Previous</a>	<a href="#">Next</a>
Job ID	Description	Status	Priority	Progress		
21182	Orion CAMA Batch Concatenated Job	✓ ⚠ 06/17/2015 03:39 PM	99			
21183	Orion CAMA Batch Calc Job	✓ ⚠ ⚠ 06/17/2015 03:39 PM	99	Processed 21 of 22 Properties		

## Batch Calculation Report

Tax Year: 2014 Calc Type: CAMA Total Properties: 22 Total Calculated: 21 Total Errors: 0 **Total Skipped: 1** Appraisal

Batch: 6/17/2015 3:37:38 PM

Property Detail UserText SystemText

# Property Locks

- List Manager can create a property list using lock reason

**Select Properties**

For Tax Year **2015**

**Property Identifiers**

Property ID

From Property ID

To Property ID

Lease ID

Map ID

From Quick-Ref ID

To Quick-Ref ID

Owner ID

Owner Legacy ID

**General Property Information**

Property Type

Property Status

Taxing Entity

Tax District

Neighborhood

**Situs Address Information**

Location Name

Situs Street

Situs City

**Legal Description Information**

Abstract

Subdivision

Condominium

MH Serial #

MH Label #

Section

Township

Range

**Additional Options**

Lock Reason

Property Flag

# Property Locks

- List Manager Select Columns includes lock reason as one of the options

**Select Property List Columns**

Select up to seven data elements to display in the property list.

Property Identifiers	Situs Address Information
Property ID <input checked="" type="checkbox"/>	Full Situs Address <input checked="" type="checkbox"/>
Quick Ref ID <input type="checkbox"/>	Location / DBA <input type="checkbox"/>
Lease ID <input type="checkbox"/>	Situs Street <input type="checkbox"/>
Map ID <input type="checkbox"/>	Situs City <input type="checkbox"/>
Owner ID <input type="checkbox"/>	
Owner Name <input type="checkbox"/>	

General Property Information	Legal Description Information
Property Type <input checked="" type="checkbox"/> Code	Full Legal Description <input type="checkbox"/>
Property Status <input type="checkbox"/> Code	Subdivision <input type="checkbox"/> Code
Taxing Entity <input type="checkbox"/> Code	Condominium <input type="checkbox"/> Code
Tax District <input type="checkbox"/> Code	MH Serial # <input type="checkbox"/>
Neighborhood <input type="checkbox"/> Code	MH Label <input type="checkbox"/>
Property Flags <input type="checkbox"/> Code	Section <input type="checkbox"/>
	Township <input type="checkbox"/>
	Range <input type="checkbox"/>

Additional Information
Lock Reasons <input checked="" type="checkbox"/> Code

**Continue** **Exit**



# Property Locks

- The list of locked properties can be saved and user in a batch unlock job.

Property					Export	Import	Clear	Copy
Property ID	Prop Type	Neighborhood	Legal Description	Lock Reason				
006605500	Com	26091	IOLL ELEVATOR RR ROW TRACTS 3-14-7 TRACTS OF WAHOO	App_Asmt - Lock appraisal and assessment				
000106500	Ag	1	IOLL HOG SHED IN W 1/2 NE 16-13-5	App_Asmt - Lock appraisal and assessment				
000012000	Ag	1	, ACRES 0	App_Asmt - Lock appraisal and assessment				
002745001	Ag	5	IOLL (60'x 90') POST FRAME BLDG LOCATED E 1/2 NW 12-15-8 (ERIC NELSON PROPERTY)	App_Asmt - Lock appraisal and assessment				
001432600	Ag	2	IOLL 2 DRYING BINS N 1/2 NE 19-17-6	App_Asmt - Lock appraisal and assessment				
002112500	Ag	3	IOLL DRYING BIN IN N 1/2 NW 16-15-7	App_Asmt - Lock appraisal and assessment				
002268501	Ag	2	, ACRES 0	App_Asmt - Lock appraisal and assessment				
002251500	Ag	2	IOLL OUTBUILDINGS IN S 1/2 SW 22-16-7	App_Asmt - Lock appraisal and assessment				
001932501	Ag	2	BAL NW NW & TR S 1/2 NW 11-14-7 (24.36 ACRES)	App_Asmt - Lock appraisal and assessment				
001715500	Ag	3	IOLL PIG SHELTER IN 35-13-7	App_Asmt - Lock appraisal and assessment				

# Transfers



# Transfers

- There are several system administration settings that affect transfers

Field	Description	Setting Name
Interest Type <input type="text" value="Fee Simple - 3"/>	Can set the default for a new transfer.	DfltIntType1
<input type="checkbox"/> Exclude from Sales Ratio Study	Can allow users to choose to exclude from ratio study	TransfersDisplayExcludeFromSRStudy
Deed Date <input type="text"/>	Option to require make Deed Date a required field	TransfersRequireDeedDate
Sale Date <input type="text" value="02/12/2016"/>	Option to require make Sale Date a required	TransfersRequireSaleDate
Book <input type="text"/> Page <input type="text"/> Instrument Number <input type="text"/>	1=Display Book and Page only 2=Display Instrument Number only 3=Display both	TransfersSaleReferenceFields

# Transfers

- Exemptions can be configured to respond to ownership changes on the transfer tab

**Modify Exemptions**

Show this code for Appraisal

**System-Wide Code and Description**

Code: AGO  
Description: Art Galleries/Observatories/Zoos/Museums

**System-Wide Exemptions Behavior**

Exemption Type: Exemption  
Property Types: Real Property, Personal Property - Strict

**Exemption Options**

Require Effective Date  
 Flag for Review if Split or Combined

**Actions if Ownership Changes**

Action Type: Automatic  
 Flag exemptions for review  
 Transfer exemptions to the new owner  
 Set a termination date  
Date Type: Sale Date

**Exemption Calculation Information**

Calc Def Grp: Art Galleries, Observatori  
Ex Value: [ ]

Save Exit

Description	Setting Name
The status to be used to update the exemption when a transfer has resulted in an inactive exemption	ExemptionInactiveStatus
The Exemption Change Reason Code should be when a property is transferred and the exemption changes hands.	TransfersExemptionChangeReason

# Transfers

- Only Kansas has the Reference View option in the Show dropdown on the Transfer Tab. This option displays the Kansas custom transfer field COV as one of the columns.

Sort  ▼

Show  ▼

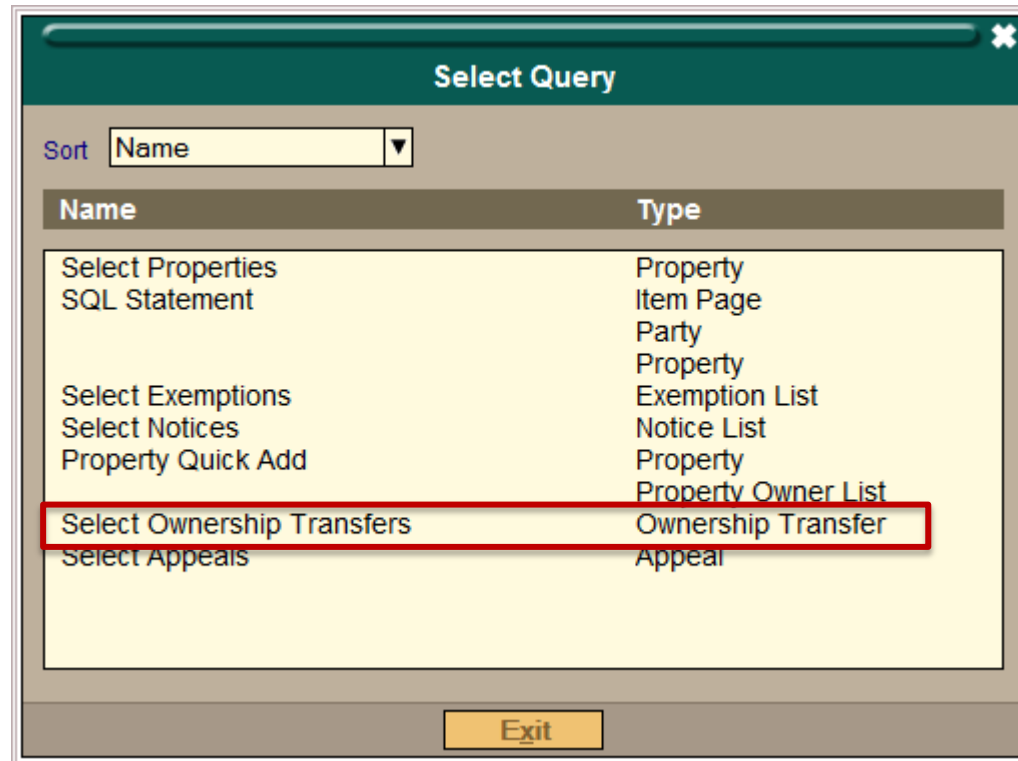
Ownership Transfers

Sale Date	Deed Date	COV	Book/Page	Instr Number	Source	Validity	Sale Type	Area
12/22/2009	12/22/2009	910314		29113243	8	2	2	221,000/221,000
12/01/1992		214652			7	0	2	125,084/125,084
06/01/2000		006067			8	0	2	170,000/170,000
05/01/2003		305635			8	0	2	190,000/190,000

Transfer Data View  
Buyer - Seller View  
Reference View

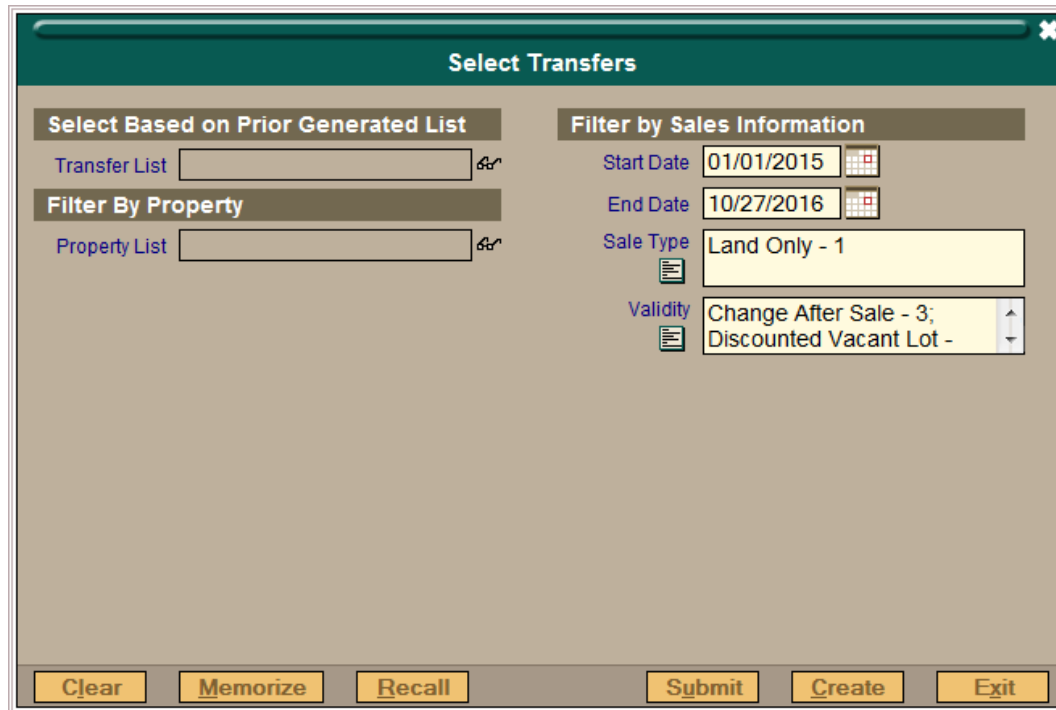
# Transfers

- Don't forget that List Manager now has the option to create an Ownership Transfer List



# Transfers

- The parameters for a transfer list are basic.



The screenshot shows a software window titled "Select Transfers" with a dark green header bar. The window is divided into two main sections: "Select Based on Prior Generated List" and "Filter by Sales Information".

**Select Based on Prior Generated List**

- Transfer List:  (with a search icon)

**Filter By Property**

- Property List:  (with a search icon)

**Filter by Sales Information**

- Start Date: 01/01/2015 (with a calendar icon)
- End Date: 10/27/2016 (with a calendar icon)
- Sale Type: Land Only - 1 (with a list icon)
- Validity: Change After Sale - 3; Discounted Vacant Lot - (with a list icon)

At the bottom of the window, there is a row of six buttons: Clear, Memorize, Recall, Submit, Create, and Exit.

# Transfers

- Once a list is created, the user has the option to select columns.
- Transfer custom fields can be selected.
- The list can be sorted by any of the columns selected.

**Select Ownership Transfer List Columns**

Select up to seven data elements to display in the list.

Property Identifiers	Other Transfer Information
Quick Ref ID <input checked="" type="checkbox"/>	Sale Type <input checked="" type="checkbox"/> Code
Property ID <input type="checkbox"/>	Transfer Validity <input checked="" type="checkbox"/> Code
Additional Prop Count <input checked="" type="checkbox"/>	Book <input type="checkbox"/>
	Page <input type="checkbox"/>
	Instrument Number <input type="checkbox"/>
	Instrument Type <input checked="" type="checkbox"/> Code

Sale Date and Price Information
Sale Date <input checked="" type="checkbox"/>
Deed Date <input type="checkbox"/>
Sale Price <input checked="" type="checkbox"/>
Adj Sale Price <input type="checkbox"/>

Custom Fields	
addlscrn <input type="checkbox"/> Code	cov <input type="checkbox"/>
dom <input type="checkbox"/>	Ratioyr <input type="checkbox"/>
SplitMultiparcel <input type="checkbox"/> Code	tod <input type="checkbox"/>
todname <input type="checkbox"/>	

**Continue** **Exit**



# Transfers

- Clicking on a row in a transfer list does not navigate to the property
- The only action option is Nebraska specific

**D List Manager - 2017** Appraisal Launch

Location: **Appraisal** Sort  Show

List Name: **null**

**Ownership Transfer**

Quick-Ref ID	Addl Props	Sale Date	Sale Price	Sale Type	Validity	Inst Type
R5712	0	08/21/2015	60,000	1	9	
R15	2	09/11/2015	400,000	1	9	
R5976	0	10/08/2015	2,500	1	9	
R5977	0	10/08/2015	1,000	1	9	
R5978	0	10/08/2015	5,600	1	9	
R5979	0	10/08/2015	5,900	1	9	
R5980	0	10/08/2015	2,522	1	9	
R11787	0	02/22/2016	40,000	1	9	
R302790	0	02/26/2016	10,000	1	9	
R3780	1	04/04/2016	4,000	1	9	
R301892	1	04/04/2016	50,000	1	9	
R5981	0	07/29/2016	10,000	1	9	
R302359	0	08/24/2016	12,000	1	9	
R10911	0	09/27/2016	1,000	1	9	

# Transfers

- A transfer list can be exported. The export will include all custom fields even if these fields were not selected to be displayed in the list

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Additional	DeedDate	InstrumentNumber	Instrument	InstrumentTypeID	PropertyN	QuickRefID	RecordedDate	SaleDate	SalePrice	SaleTypeC	SaleTypeID	Transfer
2	0	4/3/2015		OTH	240437	M361832	M361832	4/28/2015	2/19/2015	37000	U	240455	VALID
3	0	3/31/2015	2015034780	WD	240466	R279196	R279196	4/28/2015	3/30/2015	310000	RI	240479	VALID
4	0	3/31/2015	2015034469	WD	240466	R104148	R104148	4/27/2015	3/27/2015	275000	RI	240479	VALID
5	0	3/23/2015	2015030905	WD	240466	R206786	R206786	4/14/2015	3/19/2015	309000	RB	240505	VALID
6	0	3/27/2015	2015033182	WD	240466	R152023	R152023	4/22/2015	3/27/2015	165900	RI	240479	VALID
7	0	3/31/2015	2015034279	WD	240466	R278767	R278767	4/22/2015	3/23/2015	236000	RI	240479	VALID
8	0	3/31/2015	2015034344	WD	240466	R278893	R278893	4/22/2015	3/23/2015	249000	RI	240479	VALID
9	0	3/31/2015	2015034439	WD	240466	R180696	R180696	4/23/2015	3/30/2015	265000	RI	240479	VALID
10	0	3/13/2015	2015027342	WD	240466	R239547	R239547	4/9/2015	3/12/2015	180000	RI	240479	VALID
11	0	3/20/2015	2015029816	WD	240466	R256027	R256027	4/8/2015	3/17/2015	189000	RI	240479	VALID
12	0	3/20/2015	2015029874	WD	240466	R138865	R138865	4/8/2015	3/19/2015	271000	RI	240479	VALID
13	0	3/13/2015	2015027388	WD	240466	R178887	R178887	4/9/2015	3/12/2015	225000	RI	240479	VALID

Transfer list export

# Build and Compile



# Build and Compile

- This presentation will focus on the compile errors most likely to be encountered by a county user
- The errors the might be encountered by users who might be adding calculation statements would be a much longer presentation

Error - TaxYear2015\Node11\CDGs\PP -  
Statement 10 (Line 1) - Invalid expression  
term '&&'

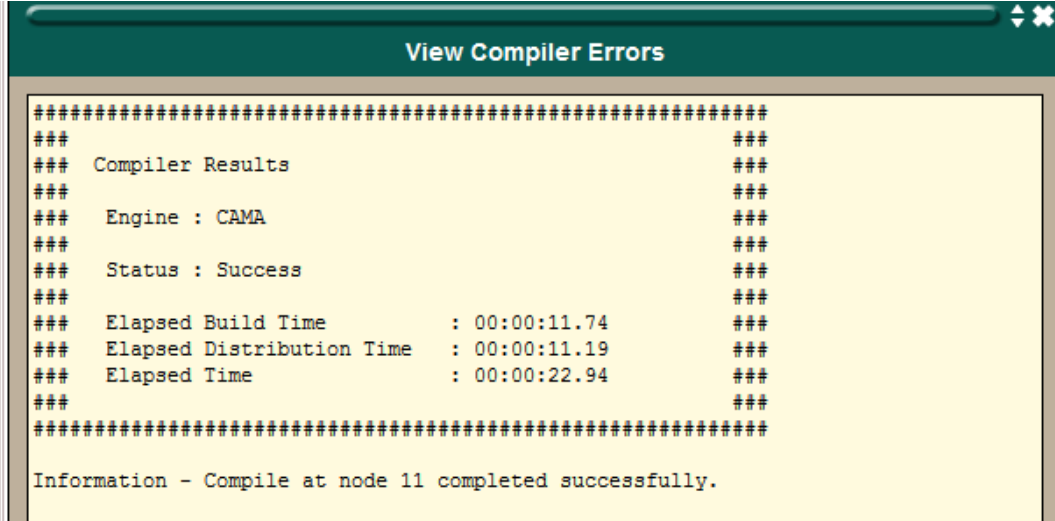
Error - TaxYear2015\Node11\CDGs\PP -  
Statement 10 (Line 1) - ) expected

Error - TaxYear2015\Node210\CDGs\ComBldg -  
Statement 50 (Line 6) - Operator '\*' cannot be  
applied to operands of type 'decimal' and  
'double'

Error - TaxYear2015\Node11\CDGs\ResImpts -  
Statement 94 (Line 34) -  
'Tyler.Orion.CAMACalc.SiteMULTCNV.Year2015.  
PropPublicVars' does not contain a definition  
for 'M50Method7'

# Build and Compile

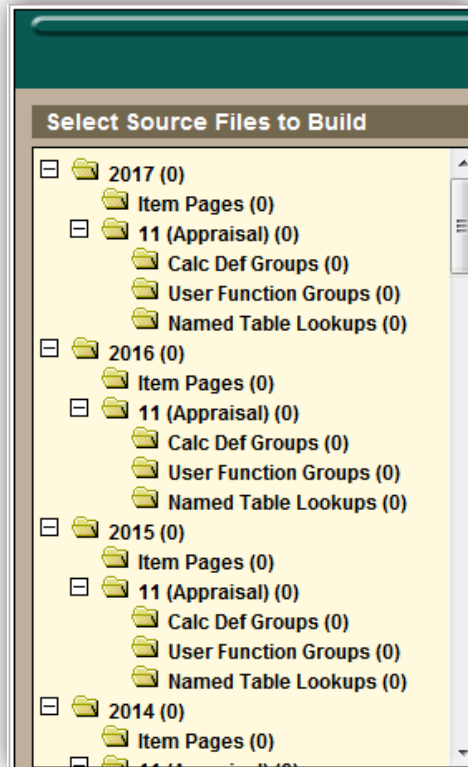
- Why Build and Compile?
  - Contents of named tables and the calculation statements are just data
  - To put data into a format that can be used by the calculation engine requires a build and compile
  - Without a successful build and compile, named table or other calculation configuration changes do not take effect



```
#####  
###  
### Compiler Results      ###  
###                      ###  
### Engine : CAMA        ###  
###                      ###  
### Status : Success     ###  
###                      ###  
### Elapsed Build Time   : 00:00:11.74  ###  
### Elapsed Distribution Time : 00:00:11.19  ###  
### Elapsed Time        : 00:00:22.94  ###  
###                      ###  
#####  
Information - Compile at node 11 completed successfully.
```

# Build and Compile

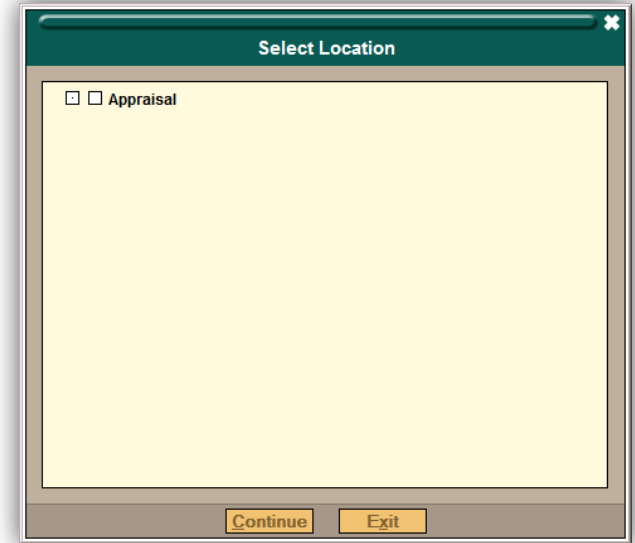
- Builds are selective



The user can choose item pages, calculation definition groups, item pages or named tables by tax year

# Build and Compile

- Compiles are currently “all or nothing”. The user cannot even select a tax year
- If there is one compile error, then nothing that was newly built takes effect
  - Example: if 10 named tables, 5 calculation definition groups and 4 item pages were built and there is a compile error on one calculation statement in one calculation definition group, none of the changes will take effect



# Build and Compile

- If there is a compile error, will calculations cease to work?
- Not if there had been a prior successful build and compile
  - Previous set of calculations will work
  - A compile error prevents any changes from taking effect




# Build and Compile

- There are four calculation areas and each has its own build and compile options
  - **CAMA calculations**: most complex and most often changed and therefore the source of most compile errors
  - **Assessment calculations**: can be complex; however, are rarely changed so build and compile errors are rare for a typical client
  - **Validation calculations**: build and compile errors are rare and if they occur, are usually easy to diagnose
    - Most encountered problem with validation calculations is logic rather than syntax errors
  - **Market Calculations**: calculations are more likely to be changed by a site
    - Calculations not usually complex and errors easier to diagnose

# Build and Compile

- What should be built?
- When the tax year is incremented the new current year and possibly the new future year should be built and then compiled
  - Build should include all item pages that have calculations, all calculation definition groups and all named tables
- CAMA, assessment and validation calculations should be built
- Tip 1: if any named tables, item pages or calculation definition groups need to be made unavailable for a new year, this **MUST** be done before the first build for that year
- Tip 2: if any calculation definition groups or item pages are routinely skipped in a build for a new tax year, make the relevant choices and memorize the parameters

Select Build Source Files Settings	
Name	User
 Full Build	Hostetler, Jean

# Build and Compile

## Mid Year Configuration changes

- Example 1 — update to a named table
  - Most common configuration update on live sites
  - Table changes must be built and then compiled
  - For almost all live sites, there is a setting that includes the build and compile in save of the named table and user never needs to go to CAMA compilation options
- Tip: if saving a named table takes a while, auto build and compile on save is turned on
  - If save is almost instantaneous, auto build and compile on save is most likely turned off

# Build and Compile

## Mid Year Configuration Changes

- Example 2 — new validation edit
  - If new edit is added to existing set of validation edits, user should only need to build validation CDG that was changed
  - If validation edits were created for page that did not currently have validation edits, then item page and calculation definition group for parent page needs to be built

Calculation Definition Group Residential Building Validation (ResBldVldn)				
Calculation Definition Statements				Modify Sequence
#	Name	Op	Description	Type
1			Process Residential Components List	List
2			Other Improvements	List
3			Garage Finish Component Without Garage Component	Validation Error
4			Garage Finish Area Greater Than Garage Area	Validation Error
5	BsmtType	=	set bsmt types full, parital and walkout to '4' for validation purposes	If Then
6			Bsmt Type without Basement component	Validation Warning
7			Basement Finish Area Greater Than Basement Area	Validation Error
8				Validation Error
9				Validation Warning
10	DuplxQty			in
11				Validation Error
12	MultiFamR			in
13				Validation Warning
14				Validation Warning
15	Bath			in
16				Validation Warning
17				Validation Error

Add Calculation Statement	
Statement Information (29 of 29)	
Type	Validation Error
Description	<input type="text"/>
<b>Error</b>	
IF	<input type="text"/>
THEN	Message = <input type="text"/>
	FieldName = <input type="text"/>

# Build and Compile

## Build Errors

- What if a necessary item is skipped in build?
  - Build is likely to complete without error; however, there will be a compile error that will identify missing item
- What if extraneous items are included in build?
  - Generally no adverse effects
- One type of configuration error causes an error in a build - a missing clause in an if-then statement
  - The message will identify calculation definition group and statement number

# Build and Compile

- Compile errors Named table errors – example 1
- Error- TaxYear2016\Node11\NamedTables\TSGLSFT.cs (Line 74733) - The name 'NaNM' does not exist in the current context.
- Cause: non numeric data in table input or output defined as number
  - A typo in a table entry such as a double decimal point (say 1..50) can cause this.

# Build and Compile

- Named table errors — example 2
- Error - TaxYear2015\Node11\CDGs\IncApt - Statement 5 - IncApt (Line 19) - No overload for method 'Lookup' takes '17' arguments
- Error indicates mismatch between named table setup and calculation statement that calls named table
- This error will not occur unless a new output was defined for the table (intentionally or accidentally) and the calculation statement that calls the named table was not changed.

# Build and Compile

- Caution
- If there is a compile error, do not ignore it
  - Once there is a compile error no configuration changes, including named table changes, for any tax year will take effect
- Work on fixing the error and if efforts fail, file a support issue



# Build and Compile

