



ORCATS
Software Manual

Property Appraisal

Version: 2017.01.006

Contents

Introduction

Common Features

- 4 Main Window
- 5 Transaction Toolbar
- 5 Transaction Menu
- 6 Saving Your Work
- 7 Breadcrumb
- 7 Notification Icons
- 7 Transaction Status
- 8 Account List
- 8 Photo Preview
- 9 Footer
- 9 Account Toolbar
- 10 Account Menu
- 11 Account Links
- 11 Account Navigation
- 12 Calculation Stack
- 12 Value Matrix
- 13 List Controls
- 13 List Features
- 14 Comments
- 15 Dockable Windows

Workflow

- 17 Workflow Search
- 18 Workflow Queue
- 19 Research and Edit Modes
- 19 Finalizing a Transaction

Workspaces

- 21 Account
 - 24 Improvements
 - 25 Adding an Improvement
 - 27 Details Tab
 - 27 *Editing Adjustments*
 - 28 *Editing Complete Percent*
 - 29 *Value Matrix*
 - 31 Floors Tab
 - 31 *Editing Percent Good*
 - 32 *Editing Rooms*
 - 32 *Editing Segment Dimensions*
 - 33 Inventory Tab
 - 34 *Quickly Entering Inventory*
 - 34 *Editing Inventory Items*
 - 35 *Adding Inventory Items*
 - 36 Accessories Tab
 - 36 *Adding an Accessory*
 - 37 *Editing an Accessory*
 - 38 MS Account Tab
 - 39 Commercial Workspace
- 40 Land
 - 41 Land Fragments
 - 42 *Edit Land Fragment Size*
 - 43 *On-Site Developments*
 - 44 Land Adjustments
 - 45 Fire Patrol Controls (Land)
 - 45 Size Totals
- 46 Values
 - 47 Value Summary
 - 48 Exceptions
- 49 Miscellaneous Workspace
 - 50 Notations
 - 51 Special Assessments
 - 52 Exemptions
 - 53 Fire Patrol
 - 54 Appraisal Maintenance

List of Figures

4	Figure 1 – Main Window
6	Figure 2 – Save Button
7	Figure 3 – Breadcrumb
7	Figure 4 – Transaction Status Bar
7	Figure 5 – Research Mode Status
8	Figure 6 – Account List
8	Figure 7 – Photo Preview
9	Figure 8 – Footer
9	Figure 9 – Account Toolbar
12	Figure 10 – Calculation Stack Window
12	Figure 11 – Value Matrix Example
14	Figure 12 – Comments Control
14	Figure 13 – Comments Window
15	Figure 14 – Undocked Value Summary
16	Figure 15 – Workflow Queue
17	Figure 16 – Workflow Search Criteria
18	Figure 17 – Workflow Views
20	Figure 18 – Workspace Example
21	Figure 19 – Account Workspace
22	Figure 20 – Account Workspace Controls
24	Figure 21 – Improvements Workspace
25	Figure 22 – Add Improvement Window
26	Figure 23 – Improvement Attributes
26	Figure 24 – Impr. Common Controls
27	Figure 25 – Improvement Details Tab
27	Figure 26 – Impr. Adjustments Window
28	Figure 27 – Components Tab
28	Figure 28 – Calculate Addition Tab
29	Figure 29 – Improvement Value Matrix
31	Figure 30 – Improvement Floors Tab
31	Figure 31 – Percent Good Pop-Up
32	Figure 32 – Room Counts Pop-Up
32	Figure 33 – Dimensions Pop-Up
33	Figure 34 – Improvement Inventory Tab
33	Figure 35 – All Inventory
34	Figure 36 – Quick Entry
34	Figure 37 – Edit Inventory Window
35	Figure 38 – Add Inventory Window
36	Figure 39 – Accessories Tab
36	Figure 40 – Add Accessory Window
37	Figure 41 – Edit Accessory Window
38	Figure 42 – MS Account Tab
39	Figure 43 – Commercial Impr. Workspace
40	Figure 44 – Land Workspace
41	Figure 45 – Land Fragments List
41	Figure 46 – Land Fragments Workspace
42	Figure 47 – Edit Size Pop-Up
43	Figure 48 – On-Site Developments List

43	Figure 49 – On-Site Development Workspace
44	Figure 50 – Land Adjustments List
44	Figure 51 – Land Adjustments Workspace
45	Figure 52 – Fire Patrol Controls
45	Figure 53 – Surcharge Amount Pop-up
45	Figure 54 – Size Totals Lists
46	Figure 55 – Values Workspace
47	Figure 56 – Modify MAV Window
48	Figure 57 – Exceptions List
48	Figure 58 – Exception Value Window
49	Figure 59 – Miscellaneous Workspace
50	Figure 60 – Notations List
50	Figure 61 – Add Notation Window
50	Figure 62 – Notations Workspace
51	Figure 63 – Special Assessments List
51	Figure 64 – Add Special Assessment Window
51	Figure 65 – Special Assessments Workspace
52	Figure 66 – Exemptions List
52	Figure 67 – Exemptions Workspace
53	Figure 68 – Fire Patrol List
53	Figure 69 – Fire Patrol Workspace
54	Figure 70 – Appraisal Maintenance List
54	Figure 71 – Add Appraisal Maint. Window
54	Figure 72 – Modify Appraisal Maint. Window

List of Tables

5	Table 1 – Transaction Toolbar
5	Table 2 – Transaction Menu
6	Table 3 – Save Combo Button Menu
7	Table 4 – Notification Icons
9	Table 5 – Account Toolbar Controls
10	Table 6 – Account Menu
11	Table 7 – Account Links
13	Table 8 – Dedicated List Controls
15	Table 9 – Dockable Window Controls
18	Table 10 – Workflow Queue Data
23	Table 11 – Account Workspace Attribute Lists
30	Table 12 – Impr. Value Matrix Actions
30	Table 13 – Impr. Value Matrix Detail
33	Table 14 – Additional Inventory Actions
35	Table 15 – Inventory Code Options
46	Table 16 – Values Toolbar
48	Table 17 – Exception Value Window Tools
53	Table 18 – Fire Patrol Tools

Introduction

The focus of the Property Appraisal application is managing property values and attributes within a robust workflow and task management framework. Improvements, floors, inventory, accessories, land, and values for properties can be configured and adjusted from this application.

This document begins by describing common features that appear throughout the application. Then, workflow is presented. Finally, workspaces are described.

Common Features

Main Window

When a transaction has been viewed from the Workflow Queue, the first account in the transaction will open in the main window, as shown in Figure 1.

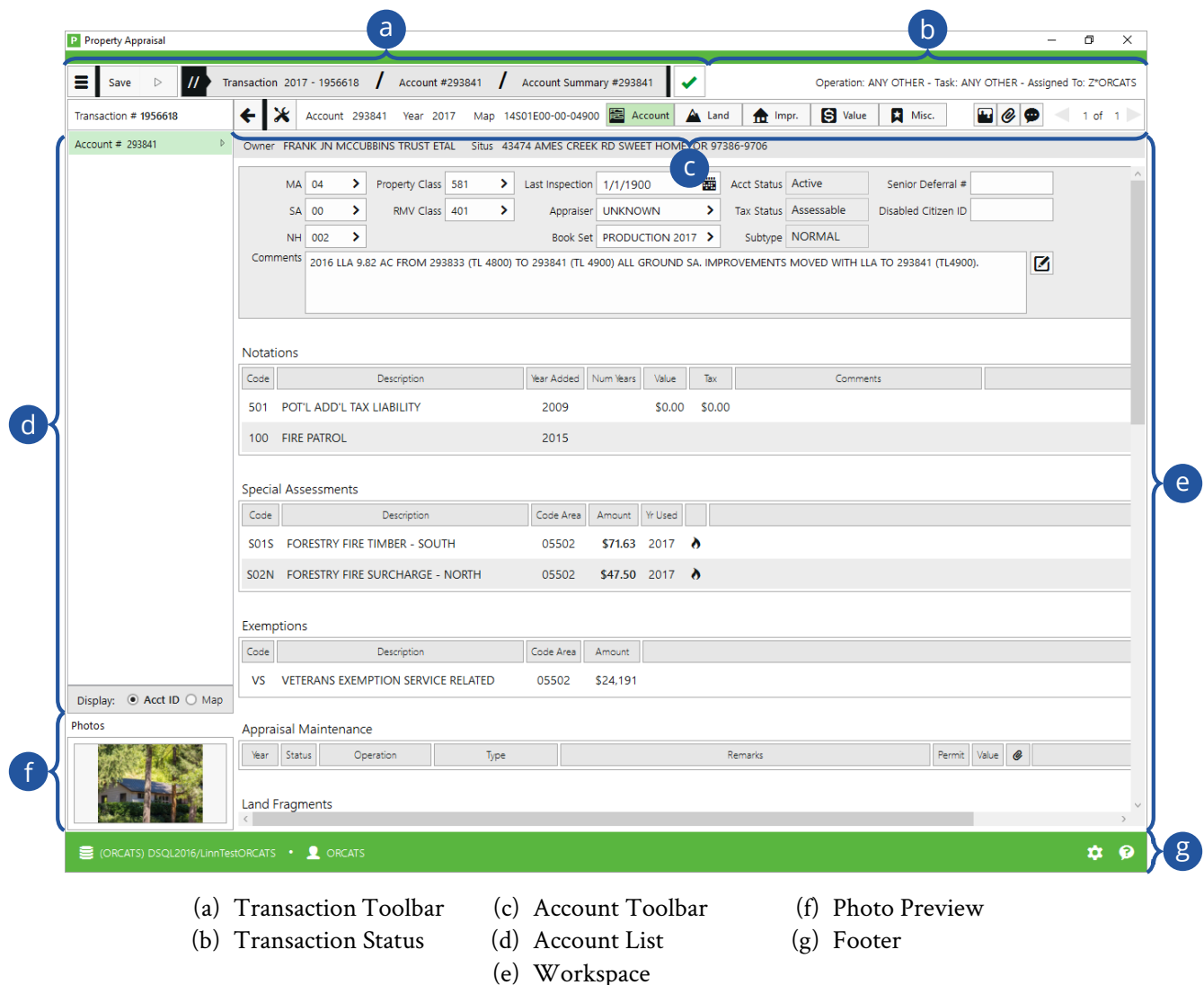


Figure 1 – Main Window

Transaction Toolbar

The transaction toolbar, described by Table 1, is always visible above the account toolbar.

Transaction Toolbar




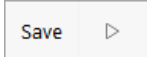


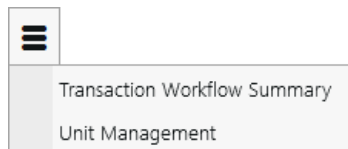
Tool	Name	Function
	Transaction Menu	A menu with transaction-level options for managing workflow and contiguous units.
	Save Button	A button with a menu for temporarily saving or permanently finalizing account work.
	Breadcrumb Trail	A collection of hierarchical links to related attributes of the transaction or account.
	Notifications	A button that displays errors, warnings, and notifications.

Table 1 – Transaction Toolbar

Transaction Menu

Transaction-level options can be accessed from the transaction menu as shown in Table 2.

Transaction Menu



Option	Result
Transaction Workflow Summary	Opens the Transaction Workflow Summary window.
Unit Management	Opens the Unit Management workspace.

Table 2 – Transaction Menu

Saving Your Work

The save button is shown in Figure 2. While working in edit mode, you can click *Save* to store the changes in the current transaction temporarily and come back to work with them later. Saving a transaction does not permanently alter the account data; the particulars of **Finalizing a Transaction** are discussed elsewhere.

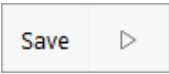


Figure 2 – Save Button

Clicking the caret displays the menu shown in Table 3. Each menu item here carries the notion of *and then...* along with it. Some examples: save, and then open a new task; save, and return to the work queue; finalize, and then return to the work queue.

Save Combo Button Menu	
<div><div>Save ▼</div><div><div>Save & New Task</div><div>Save & Return to Queue</div><div>Finalize</div><div>Finalize & New Workflow</div><div>Revert To Last Save</div><div>Delete</div></div></div>	
Option	Result
Save & Return to Queue	Creates a temporary save of the workflow item and returns to the Workflow Queue.
Finalize [†]	Saves the workflow item and commits its changes to the database. If transaction errors or warnings are present, the Notifications window will interrupt the finalization.
Finalize & New Task [†]	Performs a <i>Finalize</i> and opens the Create New Task window.
Finalize & New Workflow [†]	Performs a <i>Finalize</i> ; opens the Create New Workflow window.
Revert to Last Save	Discards changes and returns to the Workflow Queue.
Delete	Deletes the workflow item; returns to the Workflow Queue.

Table 3 – Save Combo Button Menu

[†]This option is only available in Edit mode.

Breadcrumb

The breadcrumb, shown in Figure 3, displays the user's relative location within the application. Items shown here generally narrow in scope moving from left to right. The transaction itself is always the first item, and the place you are currently working is the last item shown in the breadcrumb. You can click the root (the leftmost part of the breadcrumb, shown as a double slash) to collapse or expand the breadcrumb.

Clicking an item opens the associated window or workspace. In the breadcrumb shown, *Fire Patrol* is the current location. You could click *Misc* to navigate to the Miscellaneous workspace, or click *Account* to navigate to the Account workspace.

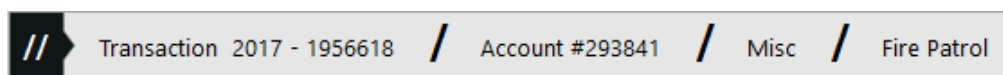


Figure 3 – Breadcrumb

Notification Icons

Errors, warnings, and notifications about the accounts in the current transaction are displayed with indication icons, shown in 4.




Icon	Name	Description
	All Clear	There are no warnings or errors on the transaction.
	Error	Indicates that there is an error on the transaction. Errors must be resolved before the transaction can be finalized.
	Warning	There is at least one warning on the transaction. Warnings do not prevent finalizing.

Table 4 – Notification Icons

Clicking any notification icon opens the Notifications window, where specific information about each error and warning can be viewed. If the account has both *errors* and *warnings* both icons will be shown.

Transaction Status

The transaction status shows the transaction operation, the current task, and the user assigned to the transaction, as shown in Figure 4. The status also visually indicates when the transaction is in research mode, as shown in Figure 5.



Figure 4 – Transaction Status Bar

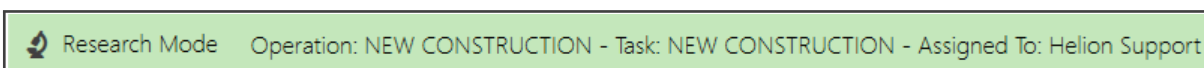


Figure 5 – Research Mode Status

Account List

The account list, shown in Figure 6, displays the accounts in the transaction. Clicking an account will load the account workspace for that account. Clicking the caret next to an account ID will display the map, mailing owner, and situs information for the account.

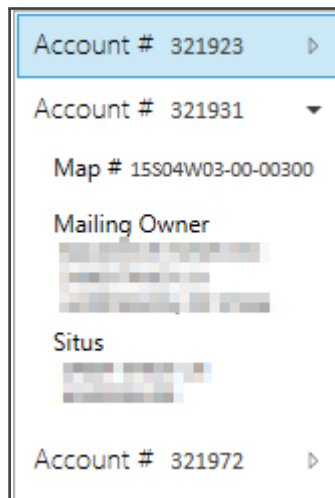


Figure 6 – Account List

Photo Preview

The photo preview displays a default photo (if it has any) from the currently selected account. Clicking the photo navigates to the Photos workspace.

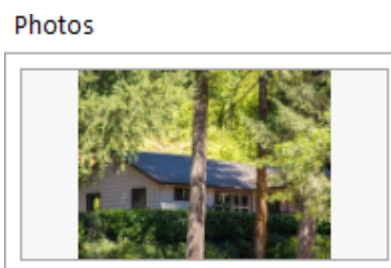
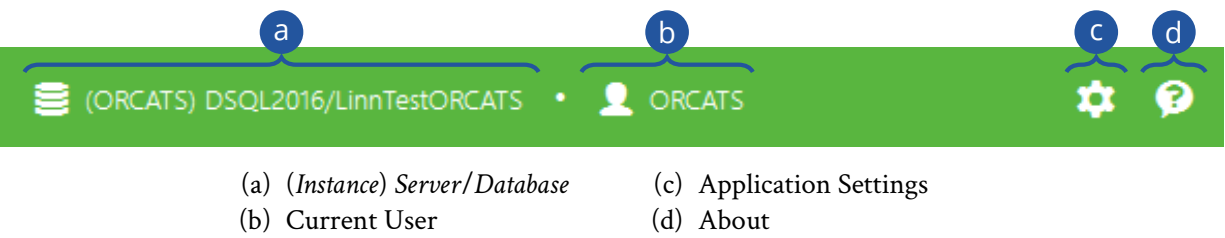


Figure 7 – Photo Preview

Footer

The footer, shown in Figure 8, displays the instance, server and database, the current user, the Application Settings button, and the About button. Click **About** to display specific information about the application and its related software, such as version numbers and licensing information.



(a) (Instance) Server/Database (c) Application Settings
(b) Current User (d) About

Figure 8 – Footer

Account Toolbar

The account toolbar, shown in Figure 9, provides account-related navigation and tools, described in Table 5.

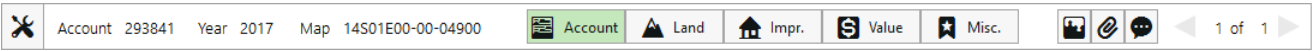


Figure 9 – Account Toolbar



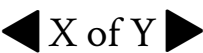
Tool	Name	Function
	Account Menu	Opens the account menu.
	Links	Provides navigation to various workspaces.
	Navigation	Moves between accounts in the transaction.

Table 5 – Account Toolbar Controls

Account Menu

The account menu and a description of its options are shown in Table 6.

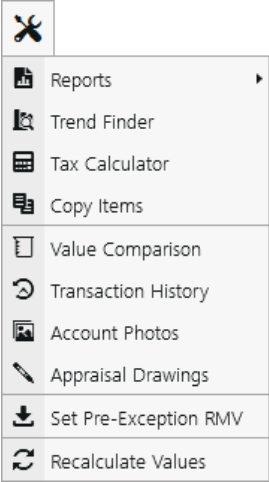









Account Menu	
	
Option	Result
	Provides a variety of history and summary reports.
	Opens the ORCATS Trend Finder.
	Opens the ORCATS Tax Calculator.
	Opens the Copy Items window, to copy account items such as improvements between accounts.
	Transaction History shortcut.
	Photos shortcut.
	Appraisal Drawings shortcut.
	Updates the Pre-Exception RMV to current values. [†]
	Performs a recalculation on the account.

Table 6 – Account Menu

[†]This operation will automatically save changes to the account.

Account Links

The account links provide shortcuts to workspaces and tools for managing different aspects of an account. The links are described in Table 7.









Link	Workspace	Purpose
	Account	View the high-level concerns on the account.
	Improvement	View and edit improvement, floor, inventory, and accessory data.
	Land	View and edit land fragments, on-site development, land adjustments, and fire patrol information.
	Values	View the value summary and various totals; view and edit exceptions for the account value sources.
	Misc.	View and edit special assessments, exemptions, notations, fire patrol, and appraisal maintenance.
	Associations	View associated MS and personal accounts.
	Attachments	View and edit attached documents.
	Account Notes	View and edit account notes.

Table 7 – Account Links

Account Navigation

Account navigation cycles through the accounts in the transaction.

Similar controls also open in the workspaces for improvements and land, to cycle through individual improvements and land fragments associated with the account.

Calculation Stack



The calculation stack button is shown throughout the application to provide transparency to the calculations performed by the engine. Clicking the button opens a window describing the means used to arrive at a particular value on the account, as shown in Figure 10.

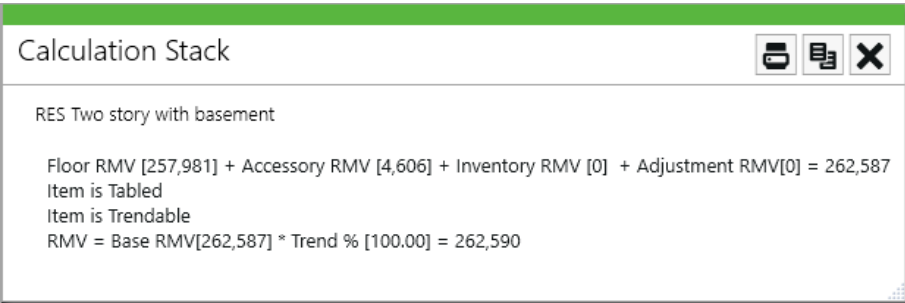


Figure 10 – Calculation Stack Window

Value Matrix

Several workspaces include a value matrix to determine how the final assessed value of the associated account item is calculated. An example from the improvement workspace is shown in Figure 11.

RMV	
Entered	<input type="text" value="0"/>
Tabled	<input type="text" value="262587"/> <input checked="" type="checkbox"/>
Over %	<input type="text" value="100.000"/>
Base	<input type="text" value="262587"/> <input type="button" value="↓"/>
Trend %	<input type="text" value="100.00"/> <input checked="" type="checkbox"/>
Final RMV	<input type="text" value="262590"/> <input type="button" value="+/-"/>
SAV	<input type="text" value="0"/>
MSAV	<input type="text" value="0"/>
MAV	
Entered	<input type="text" value="254750"/> <input checked="" type="checkbox"/>
Allocated	<input type="text" value="268620"/>
Exception	<input type="text" value="145570"/> <input type="button" value="✓"/> <input type="button" value="✖"/>
Final MAV	<input type="text" value="400320"/>
Entered AV	<input type="text" value="260790"/>
Tabled AV	<input type="text" value="262590"/> <input checked="" type="checkbox"/>
Final AV	<input type="text" value="262590"/> <input type="button" value="+/-"/>

Figure 11 – Value Matrix Example

List Controls

Many of the lists in the application have dedicated controls, as described in Table 8.

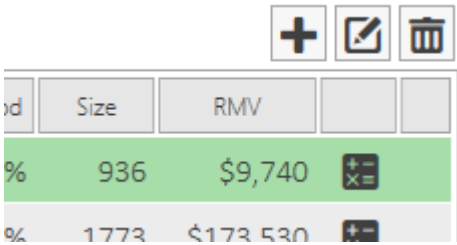



Dedicated List Controls		
		
Tool	Name	Function
	Add	Adds a new item to the list.
	Edit	Edit the selected item.
	Delete	Delete the selected item.

Table 8 – Dedicated List Controls

List Features

Most Property Appraisal lists provide the following features:

- When an item contains a checkbox, you may select or clear the selection from the list to enable or disable the option described by the header.
- When an item contains a calculation stack icon, you can click that icon to view the calculation stack.
- To edit an item, double-click it. You can also single-click the item to select it, and then click the edit button.

Comments

The comments control, shown in Figure 12, can be used throughout the application to add comments to items. Click the associated edit button to open a larger window for editing comments, as shown in Figure 13.

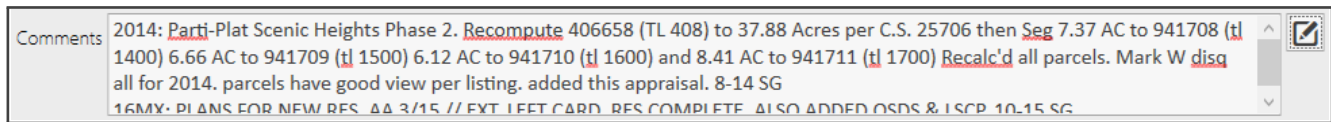


Figure 12 – Comments Control

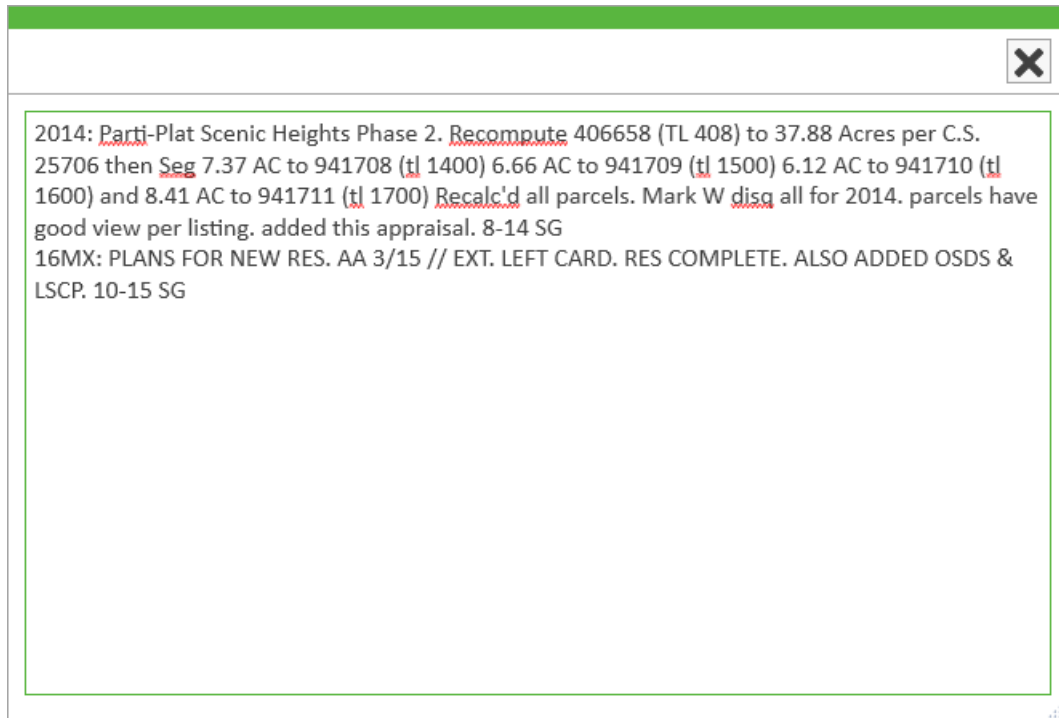


Figure 13 – Comments Window

Dockable Windows

You can undock certain elements of the application so that they will remain open in a separate window while navigating elsewhere in the main window. Click the Undock Content button to undock a screen; an undocked Value Summary window is shown in Figure 14. Dockable window controls are described in Table 9.

Code Area	Value Source	Site/Bldg	Stat Class	SA	Size	Type	Pre. RMV	Trend %	Total RMV	Tax. RMV	Exempt RMV	SAV	MSAV	M5	Market M5	Excep
05502	Small Tract Forest...	3		✓	2.02	A	\$4,095	100.000%	\$4,100	\$4,100	\$0	\$330	\$210	\$330	\$0	
05502	Small Tract Forest...	5		✓	50.00	A	\$101,250	100.000%	\$101,250	\$101,250	\$0	\$8,260	\$5,240	\$8,260	\$0	
05502	Market	6			2.58	A	\$5,229	100.000%	\$5,230	\$5,230	\$0	\$0	\$0	\$5,230	\$5,230	
05502	Farm Use Unzoned	8		✓	47.01	A	\$95,192	100.000%	\$95,190	\$95,190	\$0	\$38,407	\$16,134	\$38,407	\$0	
05502	Forest Site	11		✓	1.00	A	\$7,025	100.000%	\$7,030	\$7,030	\$0	\$1,520	\$1,520	\$1,520	\$0	
05502	SPECIAL ASSESSED...			✓		N	\$25,000	100.000%	\$25,000	\$25,000	\$0	\$4,000	\$4,120	\$4,000	\$0	
05502	RESIDENCE	100	144		3858	S	\$262,587	100.000%	\$262,590	\$262,590	\$0	\$0	\$0	\$262,590	\$262,590	
05502	RESIDENCE	101	130		0	S	\$39,260	100.000%	\$39,260	\$39,260	\$0	\$0	\$0	\$39,260	\$39,260	
05502	RESIDENCE	102	130		0	S	\$8,310	100.000%	\$8,310	\$8,310	\$0	\$0	\$0	\$8,310	\$8,310	
05502	FARM BLDG	103	327		2750	S	\$8,110	100.000%	\$8,110	\$8,110	\$0	\$0	\$0	\$8,110	\$8,110	
05502	RESIDENCE	104	110		0	S	\$3,040	100.000%	\$3,040	\$3,040	\$0	\$0	\$0	\$3,040	\$3,040	
05502	RESIDENCE	105	110		0	S	\$18,970	100.000%	\$18,970	\$18,970	\$0	\$0	\$0	\$18,970	\$18,970	
05502	RESIDENCE	200	121		1280	S	\$33,655	100.000%	\$33,660	\$33,660	\$0	\$0	\$0	\$33,660	\$33,660	
05502	RESIDENCE	201	110		0	S	\$2,600	100.000%	\$2,600	\$2,600	\$0	\$0	\$0	\$2,600	\$2,600	
05502	FARM BLDG	401	328		2600	S	\$2,900	100.000%	\$2,900	\$2,900	\$0	\$0	\$0	\$2,900	\$2,900	
05502	FARM BLDG	402	315		1040	S	\$7,740	100.000%	\$7,740	\$7,740	\$0	\$0	\$0	\$7,740	\$7,740	

Figure 14 – Undocked Value Summary

Tool	Name	Function
	Undock Content	Undocks a portion of the main window for use beyond its current boundaries.
	Dock Content	Returns the undocked window to its docked position within the main window.
	Minimize	Minimizes the undocked window to the Windows taskbar.
	Maximize	Maximizes the undocked window.

Table 9 – Dockable Window Controls

Settings for the size and position of dockable windows are stored for each user so that the window will open at the same size and position during their next session.

Workflow

When Property Appraisal is started, the Workflow Queue is displayed, as shown in Figure 15.

Criteria

Criteria Summary

User - Z*ORCATS Year - 2017

Workflow Queue - Transaction View

Locked By	Workflow ID	Transaction ID	Created	Last Updated	Year	Mode	Operation	Workflow Status	Workflow Comment
	339645	1956612	6/28/2017 7:21:43 AM		2017	Research	MAINTENANCE	Research	413514
	339563	1956534	5/2/2017 11:36:25 AM		2017	Research	MAILING NAME	Research	oops
	339564		5/2/2017 11:36:25 AM		2017	Edit	MAILING NAME	New	oops
	339559	1956529	4/26/2017 9:08:34 AM		2017	Research	MAINTENANCE	Research	22
	339557	1956526	3/30/2017 1:32:20 PM		2017	Research	OMITTED...	Research	MEDICAL OFFICE
	339640		6/13/2017 12:13:41 PM		2017	Edit	MAINTENANCE	New	
	339558	1956527	3/30/2017 1:33:16 PM		2017	Research	MAINTENANCE	Research	COMM UNIT
	286106	1903082	2/9/2017 2:56:53 PM		2017	Research	MAINTENANCE	Research	62691
	286105	1903081	2/9/2017 1:17:10 PM		2017	Edit	MAINTENANCE	Open	
	232662	1849938	2/2/2017 11:07:18 AM		2017	Research	MAINTENANCE	Research	
	232661	1849937	1/31/2017 3:17:19 PM		2017	Edit	ANY OTHER	Open	

Count: 11

Transaction View Account View

(ORCATS) DSQL2016/LinnTestORCATS • ORCATS

(a) Search Criteria
(b) Criteria Summary

(c) Workflow Queue
(d) Change Queue View

Figure 15 – Workflow Queue

Workflow Search

By default, only tasks assigned to the current user open in the Workflow Queue. To display other tasks, enter Search Criteria, shown in Figure 16, and click **Search**. The criteria used in the last search are shown in the Criteria Summary. Search results are shown in the Workflow Queue.

Criteria

Transaction ID

Workflow ID

Queue Name

Year

Real Account ID

MS Account ID

Created Range Start

Created Range End

MA

SA

NH

Include Completed

Map

Township

Range

Section

1/4

1/16

Taxlot

SI Type

SI Number

RMV Class

Property Class

Search

Clear

Criteria Summary

User - Z*ORCATS Year - 2017

Figure 16 – Workflow Search Criteria

Workflow Queue

The Workflow Queue begins in Transaction View mode by default, where each workflow item is organized primarily by transaction data. Workflow items can also be organized and displayed by their account data by using the Account View. Users can toggle between these two views using the controls shown in Figure 17. The the information displayed by these views is described in Table 10.

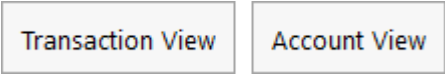


Figure 17 – Workflow Views

Column	Description
Workflow ID	The transaction’s workflow ID.
Transaction ID	The transaction’s ID.
Account ID [†]	The account being worked in this transaction. Multiple accounts can be associated with the same transaction, so a single transaction ID can open multiple times in the Workflow Queue while in Account View.
Created	The date that the transaction was created.
Year	The roll year for the transaction.
Mode	Whether the transaction is in research or edit mode.
Account Information [†]	Includes columns for the account’s MA, SA, NH, Property Class, RMV Property Class, and Map Number.
Operation	The workflow’s operation.
Workflow Status	The current status of the workflow: Research, New, Open, or Closed.
Workflow Comments	Comments on the workflow. Longer comments open truncated with an ellipsis. Comments can be viewed and edited from the Workflow Summary window, described in the Workflow Summary section.
Task Type	The type of task currently being performed in the workflow.
Assigned To	The user assigned to the task.
Task Comments	Comments on the task.

Table 10 – Workflow Queue Data

[†] opens in the Account View only.

Research and Edit Modes

Research mode allows value changes to an account with observable effects in the application that will not change production values. Changes are saved temporarily and cannot be finalized.

Edit mode allows changes to be temporarily saved; these changes can also be finalized.

Workflow items can be created in either mode. The mode of a transaction is shown in the Workflow Queue and in the **Transaction Status** of the main window.

Finalizing a Transaction

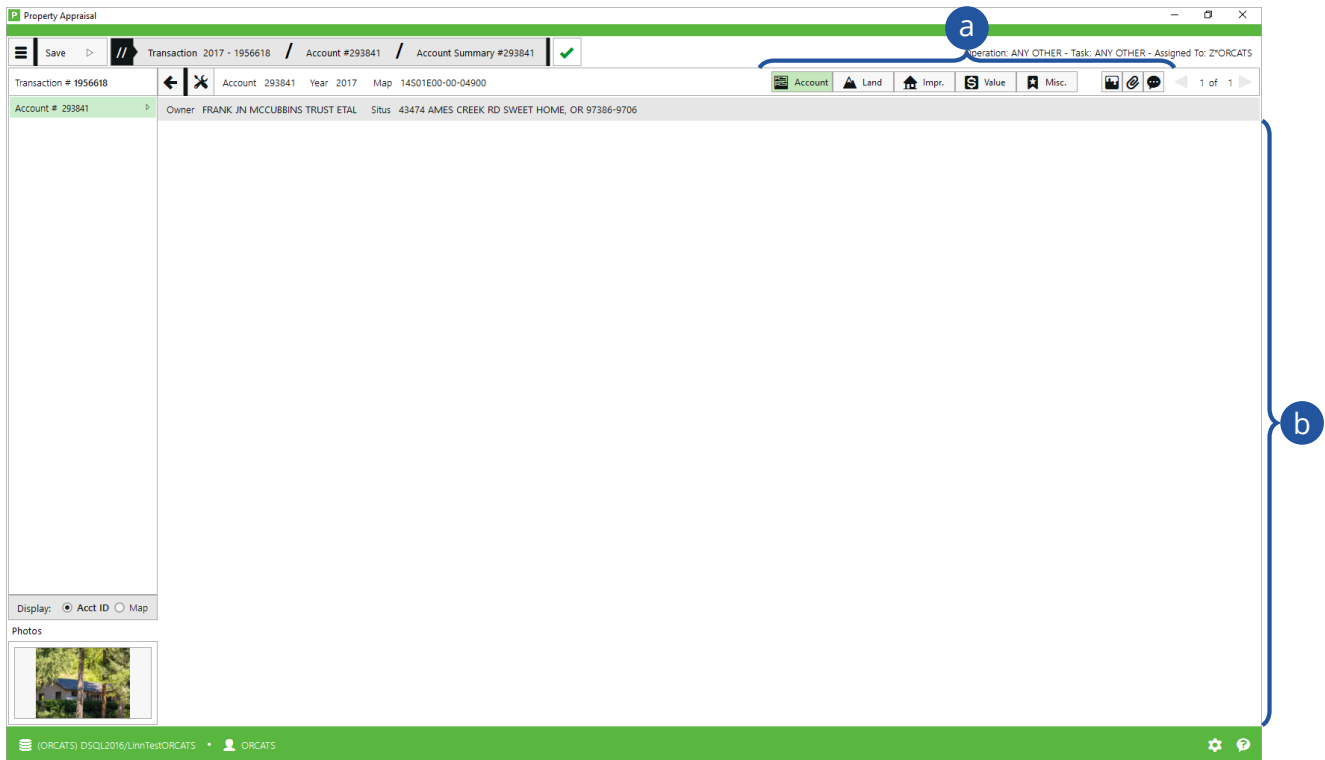
Finalizing a transaction moves value changes into production. Only transactions in edit mode can be finalized. To finalize a transaction, select a finalize option from the save menu, as described in **Saving Your Work**.

Keep the following information in mind when finalizing a transaction:

- Errors on a transaction must be resolved before finalizing. When attempting to finalize a transaction with errors, notifications will be shown with a list of errors that must be resolved before the transaction can be finalized.
- Finalized transaction changes cannot be undone.

Workspaces

A *workspace* is a collection of controls, information, and tools for viewing and changing particular aspects of an account. Clicking a link in the account toolbar will navigate to the associated workspace. Figure 18 displays a large empty area to show where the workspace content is replaced.



(a) Account Toolbar Links (b) Workspace Area

Figure 18 – Workspace Example

The workspaces linked in the account toolbar are each covered in their own section:

- **Account**
- **Improvements**
- **Land**
- **Values**
- **Miscellaneous**
- **Associations**
- **Attachments**
- **Account Notes**

Account Workspace



The account workspace, shown in Figure 19, is initially displayed for the first account listed when a transaction is opened. This workspace can also be accessed by double-clicking an account in the **Account List**.

Property Appraisal

Transaction # 1956618 / Account # 293841 / Account Summary # 293841

Operation: ANY OTHER - Task: ANY OTHER - Assigned To: Z*ORCATS

Transaction # 1956618

Account # 293841

Owner FRANK JN MCCUBBINS TRUST ETAL Situs 43474 AMES CREEK RD SWEET HOME, OR 97386-9706

MA 04 > Property Class 581 > Last Inspection 1/1/1900 > Acct Status Active > Senior Deferral # >

SA 00 > RMV Class 401 > Appraiser UNKNOWN > Tax Status Assessable > Disabled Citizen ID >

NH 002 > Book Set PRODUCTION 2017 > Subtype NORMAL

Comments 2016 LLA 9.82 AC FROM 293833 (TL 4800) TO 293841 (TL 4900) ALL GROUND SA. IMPROVEMENTS MOVED WITH LLA TO 293841 (TL4900).

Notations

Code	Description	Year Added	Num Years	Value	Tax	Comments
501	POT'L ADD'L TAX LIABILITY	2009		\$0.00	\$0.00	
100	FIRE PATROL	2015				

Special Assessments


Code	Description	Code Area	Amount	Yr Used	
S01S	FORESTRY FIRE TIMBER - SOUTH	05502	\$71.63	2017	🔥
S02N	FORESTRY FIRE SURCHARGE - NORTH	05502	\$47.50	2017	🔥

Exemptions

Code	Description	Code Area	Amount
VS	VETERANS EXEMPTION SERVICE RELATED	05502	\$24,191

Display: ☒ Acct ID ☐ Map

Photos



Appraisal Maintenance

Year	Status	Operation	Type	Remarks	Permit	Value

Land Fragments

(ORCATS) DSQL2016/LinnTestORCATS • ORCATS

Figure 19 – Account Workspace

The controls in the account workspace are described in Figure 20.

The screenshot shows the Account Workspace interface with the following sections and controls labeled:

- (a) Account Information:** MA (04), SA (00), NH (002), Property Class (581), RMV Class (401), Last Inspection (1/1/1900), Acct Status (Active), Senior Deferral #, Appraiser (UNKNOWN), Tax Status (Assessable), Disabled Citizen ID, Book Set (PRODUCTION 2017), Subtype (NORMAL), and a large text area for Comments.
- (b) Notations List:** A table with columns: Code, Description, Year Added, Num Years, Value, Tax, and Comments. It contains two entries: 501 POT'L ADD'L TAX LIABILITY (2009, \$0.00) and 100 FIRE PATROL (2015).
- (c) Special Assessments List:** A table with columns: Code, Description, Code Area, Amount, Yr Used, and a status icon. It contains two entries: S01S FORESTRY FIRE TIMBER - SOUTH (05502, \$71.63, 2017) and S02N FORESTRY FIRE SURCHARGE - NORTH (05502, \$47.50, 2017).
- (d) Exemptions List:** A table with columns: Code, Description, Code Area, and Amount. It contains one entry: VS VETERANS EXEMPTION SERVICE RELATED (05502, \$24,191).
- (e) Appraisal Maintenance List:** A table with columns: Year, Status, Operation, Type, Remarks, Permit, and Value.
- (f) Workspace Scrollbar:** A vertical scrollbar on the right side of the workspace.

Figure 20 – Account Workspace Controls

The Account Information controls are used to edit the following information:

- MA, SA, NH
- Property and RMV Classes
- Inspection Date
- Appraiser
- Book Set
- Senior Deferral Number
- Disabled Citizen ID
- Account Comments

The account workspace also lists the primary attributes of the account, as described in Table 11.

List	Description
Improvements	Real, commercial, MS, and utility improvements attached to the account.
Land Fragments	Land fragments, related individual values, and a total value summary of the land fragments.
On-Site Developments	OSDs, related individual values, and a total value summary.
Value Summary	All value sources attached to the account and related individual values.
Exceptions	Exceptions on value sources attached to the account and related individual values.
Special Assessments	Special assessments and related values.
Exemptions	Veteran, active-duty military service, and other exemptions on the account.
Fire Patrol	Fire patrol, associated fragment sizes, and related values.
Notations	Account Notations.
MS Accounts	MS Accounts associated with the current account.

Table 11 – Account Workspace Attribute Lists

Improvements Workspace



The improvements workspace, shown in Figure 21, displays a list of the improvements on the account and a summary of their values.

Property Appraisal

Save

Transaction 2017 - 1956618 / Account #293841 / Improvements

Operation: ANY OTHER - Task: ANY OTHER - Assigned To: Z*ORCATS

Account 293841 Year 2017 Map 14S01E00-00-04900

Account Land Impr. Value Misc.

Owner FRANK JN MCCUBBINS TRUST ETAL Situs 43474 AMES CREEK RD SWEET HOME, OR 97386-9706

Improvements

ID	Stat	Code Area	Yr Blt	Eff Yr Blt	Description	Class	Comp %	% Good	Size	RMV	MAV	
100	144	05502	1983	1980	RES Two story with basement	4	100%	75%	3858	\$262,590	\$254,750	
101	130	05502	0	1918	Res Other Improvement Cls 3	3	100%	46%	0	\$39,260	\$38,770	
102	130	05502	0	1898	Res Other Improvement Cls 3	3	100%	40%	0	\$8,310	\$8,210	
103	327	05502	0	1959	LOFT BARN (50x55)	5	100%	20%	2750	\$8,110	\$8,010	
104	110	05502	0	0	Residential Other Improvements	1	100%	40%	0	\$3,040	\$3,000	
105	110	05502	0	0	Residential Other Improvements	1	100%	40%	0	\$18,970	\$18,730	
200	121	05502	1960	1923	RES One story	2	100%	44%	1280	\$33,660	\$33,240	
201	110	05502	0	0	Residential Other Improvements	1	100%	40%	0	\$2,600	\$2,570	
401	328	05502	0	1959	MACHINE SHED (20x130)	4	100%	20%	2600	\$2,900	\$2,860	
402	315	05502	0	1994	FEEDER BARN (26x40)	4	100%	65%	1040	\$7,740	\$7,640	
403	317	05502	0	1978	GP BUILDING (20x32)	4	100%	40%	640	\$3,890	\$3,840	
Total RMV \$391,070										Total MAV \$381,620		

(ORCATS) DSQL2016/LinnTestORCATS

ORCATS

Figure 21 – Improvements Workspace

Adding an Improvement

To add a new improvement, click **Add** in the improvement common controls. (You can also add improvements with the Improvements list in the improvements workspace or the account workspace.)

The Add Improvement window is shown in Figure 22.

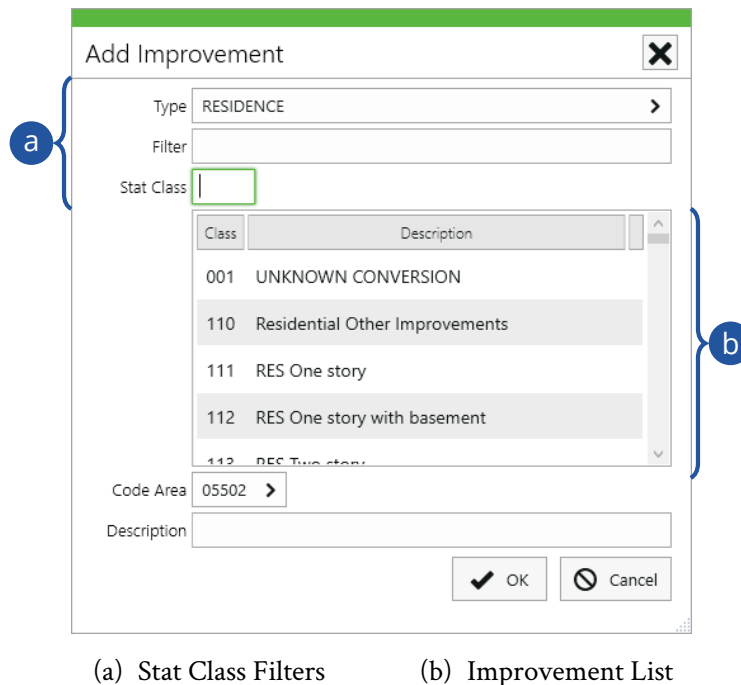


Figure 22 – Add Improvement Window

Type, Description, and Stat Class filter the improvements list. If the account has only one code area, it will be selected automatically; otherwise, select a Code Area. Click **OK** to add an improvement of the selected class to the account and close the window.

Opening an improvement from the list provides a closer look at its attributes, as shown in Figure 23.

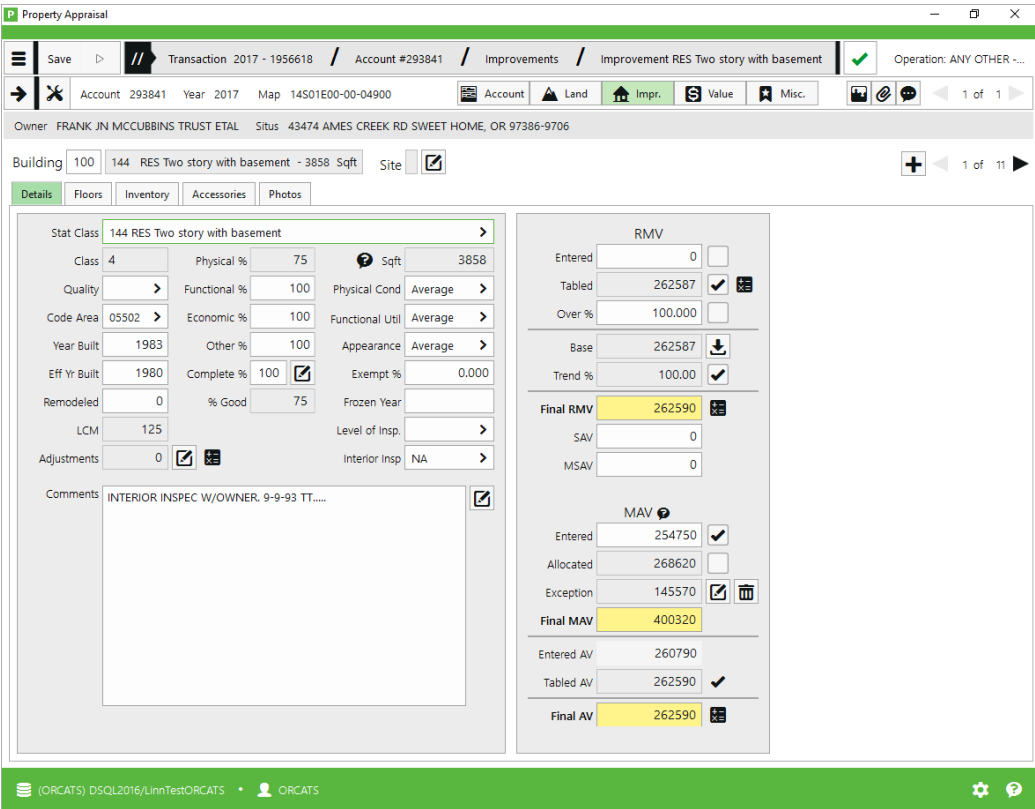


Figure 23 – Improvement Attributes

Its controls are shown in Figure 24.

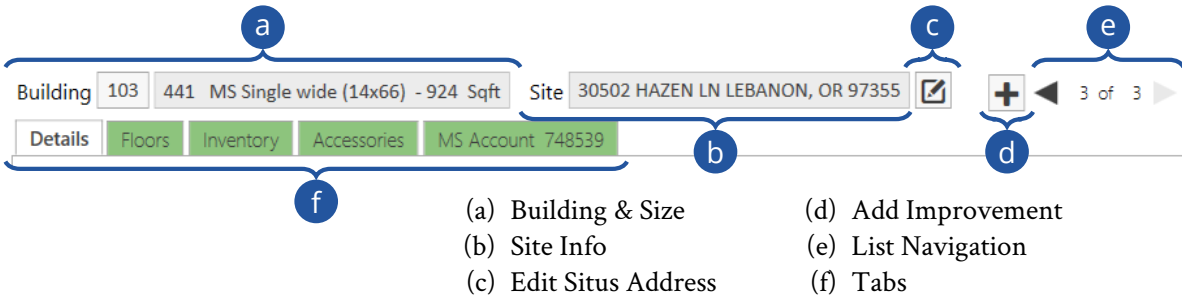


Figure 24 – Impr. Common Controls

The improvement attributes are organized into the following tabs:

- Details
- Floors
- Inventory
- Accessories
- MS Accounts
- Commercial

Details Tab

The Details tab is shown in Figure 25. Percent good, adjustments, RMV, SA, MAV, and other details for the improvement are set or calculated from this tab.

The screenshot shows the 'Details' tab selected. The interface includes several sections:

- Stat Class:** 144 RES Two story with basement
- Class:** 4
- Physical %:** 75
- Sqft:** 3858
- Quality:** [dropdown]
- Functional %:** 100
- Physical Cond:** Average
- Code Area:** 05502
- Economic %:** 100
- Functional Util:** Average
- Year Built:** 1983
- Other %:** 100
- Appearance:** Average
- Eff Yr Built:** 1980
- Complete %:** 100
- Exempt %:** 0.000
- Remodeled:** 0
- % Good:** 75
- Frozen Year:** [empty]
- LCM:** 125
- Level of Insp.:** [dropdown]
- Interior Insp:** NA
- Adjustments:** 0
- Comments:** INSPEC W/OWNER. 9-9-93 TT.....

RMV Section:

- Entered: 0
- Tabled: 262587
- Over %: 100.000
- Base: 262587
- Trend %: 100.00
- Final RMV: 262590
- SAV: 0
- MSAV: 0

MAV Section:

- Entered: 254750
- Allocated: 268620
- Exception: 145570
- Final MAV: 400320

AV Section:

- Entered AV: 260790
- Tabled AV: 262590
- Final AV: 262590

- (a) Size Info (c) Edit Adjustments
(b) Edit Complete Percent (d) Improvement Value Matrix

Figure 25 – Improvement Details Tab

Editing Adjustments

Click **Edit Adjustments** to open the Improvement Adjustments window, shown in Figure 26. To add, edit, or delete improvement adjustments, interact with the Adjustments list.

The 'Improvement Adjustments' window displays a list of adjustments. The first adjustment is selected:

Code	Description	Entered RMV	Tabled RMV	RMV
0003	ZERO LOT-LINE	\$0	-16237	-162

Below the table, the details for the selected adjustment are shown:

- Adjustment: ZERO LOT-LINE
- Entered: 0
- Tabled: -16237
- Over %: 0
- RMV: -16237

An 'OK' button is visible at the bottom right.

Figure 26 – Impr. Adjustments Window

Editing Complete Percent

Click **Edit Complete Percent** in the **Details** or **Floors** tabs to open the **Completeness Worksheet**.

The **Components** tab, shown in Figure 27, lists the parts of the improvement that are used to calculate its completeness. Selecting **Complete?** automatically sets the partial percent to 100. Enter a **Partial Percent** to calculate partially complete components.

Component	% of Total	Complete?	Partial %	Final %
Plans, permits and survey	2	<input type="checkbox"/>	0	0
Excavation, forms, water/sewage hookup	4	<input type="checkbox"/>	0	0
Concrete foundation	8	<input type="checkbox"/>	0	0
Rough Framing	21	<input type="checkbox"/>	0	0
Windows and exterior doors	2	<input type="checkbox"/>	0	0
Roof Cover	3	<input type="checkbox"/>	0	0
Rough-in plumbing	4	<input type="checkbox"/>	0	0
Rough-in electrical and mechanical	11	<input type="checkbox"/>	0	0
Insulation	1	<input type="checkbox"/>	0	0
Exterior cover	6	<input type="checkbox"/>	0	0
Interior drywall and ceiling finish	8	<input type="checkbox"/>	0	0
Built-in cabinets, interior doors, trim, etc.	13	<input type="checkbox"/>	0	0
Plumbing fixtures	5	<input type="checkbox"/>	0	0
Floor covers	3	<input type="checkbox"/>	0	0
Built-in appliances	3	<input type="checkbox"/>	0	0

Total % 0

OK Cancel

Figure 27 – Components Tab

The **Calculate Addition** tab is shown in Figure 28.

	Sq Ft	% of Whole	% Complete	% Totals
Original House	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Addition	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Totals	0			

Total % 0

OK Cancel

Figure 28 – Calculate Addition Tab

Value Matrix

The improvement value matrix is shown in Figure 29 and described in Tables 12 and 13.

The screenshot displays the 'Improvement Value Matrix' interface, which is organized into several sections. On the left, four blue boxes labeled 'RMV', 'SA', 'MAV', and 'AV' are connected by lines to their respective sections in the form. On the right, five blue boxes provide descriptions for specific fields or icons: 'Entered, Tabled, and Override Percent', 'Update Pre-Exception RMV', 'Delete Exceptions', 'Edit Exceptions', and 'Final AV Calculation'.

RMV Section:

- Entered: 13690
- Tabled: 13685 (checked)
- Over %: 100.000
- Base: 13685 (with a download icon)
- Trend %: 122.00 (checked)
- Final RMV: 16700

SA Section:

- SAV: 0
- MSAV: 0

MAV Section:

- Entered: 0
- Allocated: 0 (checked)
- Exception: 16700 (with edit and delete icons)
- Final MAV: 16700

AV Section:

- Entered AV: 0
- Tabled AV: 16700 (checked)
- Final AV: 16700 (with a calculation icon)

Figure 29 – Improvement Value Matrix




Tool	Name	Function
	Update Pre-Exception RMV	Resets the base RMV to the value before exceptions were applied.
	Edit Exceptions	Opens the Edit Exceptions window.
	Delete Exceptions	Deletes exceptions associated with the current account item.

Table 12 – Impr. Value Matrix Actions

Section	Value	Description
RMV	Entered	If selected, uses the entered RMV.
	Tabled	If selected, uses the tabled value from the related schedule.
	Override Percent	If selected, applies the override percent to the tabled value.
	Base	The base RMV as calculated from entered, tabled, or override percent.
	Trend Percent	If selected, applies the trend percent to the base RMV.
	Final RMV	The RMV after the base RMV has the trend percent applied.
SA[†]	SAV	An optionally-entered SAV.
	MSAV	An optionally-entered MSAV.
MAV	Entered	If selected, uses the entered MAV.
	Allocated	If selected, uses the allocated MAV.
	Exception	The total exception value applied to the item.
	Final MAV	The total value of entered MAV or allocated MAV and total exception.
AV	Entered AV [‡]	If selected, uses the entered AV.
	Tabled AV	The AV as calculated based on selections in the value matrix and supporting data.
	Final AV	The entered AV or the tabled AV, depending on the selection.

Table 13 – Impr. Value Matrix Detail

[†]If the account is specially assessed, the lesser of the SAV and MSAV will be used for the final AV.

[‡]Editing entered AV is controlled by permission. Users without the permission to change the entered AV cannot change whether the final AV calculation uses the tabled AV or the entered AV.

Floors Tab

The Floors tab, shown in Figure 30, displays a list of each floor in the selected improvement. When a floor is selected, the year, size, and percent good information, as well as rooms, comments, and RMV are displayed for that floor. The value and details for floor segments on are listed below the floor information. Inventory items assigned to the floor are displayed under the floor segments. Inventory items assigned to the floor are displayed under the floor segments.

The screenshot shows the 'Floors' tab in a software application. It includes a table of floors, a detailed view of the selected floor (First Floor), a segments section, and an inventory list. Callouts are placed as follows:

- a**: Points to the 'Floors' table header.
- b**: Points to the 'Edit Complete Percent' and 'Edit Percent Good' fields.
- c**: Points to the 'Edit Rooms' section.
- d**: Points to the 'Floor Value Matrix' section.
- e**: Points to the 'Segments' table header.
- f**: Points to the 'Edit Dimensions' field.
- g**: Points to the 'Inventory' table header.

Location	Dimensions	Eff Yr Built	Class	SQFT	RCN	Inventory	Comp %	% Good	Adj RCN	RMV
First Floor		1980	4	2746	\$214,301	\$19,808	100%	75%	\$180,533	\$180,533
Second Floor		1980	4	800	\$55,850	\$0	100%	75%	\$41,887	\$41,887
Basement		1980	4	624	\$47,415	\$0	100%	75%	\$35,561	\$35,561

Floor: First Floor

Year Built: 1983 Eff Yr Built: 1980

Complete %: 100 ☒ Use Parent

% Good: 75 ☒ Class: 4

Total SQFT: 2746 Quality:

Dimensions:

Rooms

Room	Qty
Bedroom	3
Full Bathroom	3
Fireplace/Woodstove	1

Comments

Entered: 180533 ☐

Tabled: 180533 ☒

Over %: 100.000 ☐

Final RMV: 180533

Segments

Type: First Floor

Entered Sqft: 2746 ☒ LCM: 125

Class: 4 ☒ Use Parent

Tabled Sqft: 0 ☒ Over %: 100

Sqft: 2746 ☒ RCN: 214301

Inventory

Code	Description	Size	Qty	Class	QA	Tabled RCN	Apply LCM	LCM	RCN	% Good	Tabled RMV	Entered RMV	OR %	Value	RMV
6029	APPL - DELUXE COOKTOP	0	1	4		\$700	<input checked="" type="checkbox"/>	125%	\$875	75%	\$656	\$656	100.000%	Tabled	\$656
6009	APPL - DISHWASHER	0	1	4		\$480	<input checked="" type="checkbox"/>	125%	\$600	75%	\$450	\$450	100.000%	Tabled	\$450

(a) Floors List (c) Edit Rooms (e) Segments List

(b) Edit Complete Percent (d) Floor Value Matrix (f) Edit Dimensions

Edit Percent Good (g) Inventory List

Figure 30 – Improvement Floors Tab

Editing Percent Good

Click the Edit Percent Good button to edit the percent good for the selected floor. The Percent Good pop-up will open, as shown in Figure 31.


The 'Edit % Good' pop-up window contains the following fields:

- Physical %: 75
- Functional %: 100
- Economic %: 100
- Other %: 100
- Complete %: 100
- % Good: 75
- ☒ Use Parent

Figure 31 – Percent Good Pop-Up

Editing Rooms

Click the Edit Rooms button to edit the list of rooms on a floor. The Room Counts pop-up will open, as shown in Figure 32.



The Room Counts pop-up dialog box has a title bar with a close button (X). It contains a list of room types on the left, each with a small input box for its count. To the right of each room type is a row of five buttons labeled 0, 1, 2, 3, and 4. At the bottom are OK and Cancel buttons.

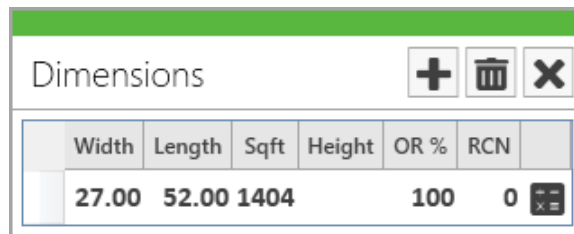
Room Type	0	1	2	3	4
Bedroom					
Full Bathroom					
Half Bathroom					
Bonus Room					
Utility Room					
Dining Room					
Living Room					
Great Room					
Family Room					
Other Room					
Den					
Kitchen					
Nook					
Fireplace/Woodstove					

Figure 32 – Room Counts Pop-Up

To edit the number of rooms on the floor, click a number or enter a number next to the room entry, then click OK; click Cancel to discard changes.

Editing Segment Dimensions

Click the Edit Dimensions button to open the Dimensions pop-up, shown in Figure 33.



The Dimensions pop-up dialog box has a title bar with add (+), delete (trash), and close (X) buttons. It contains a table with columns for Width, Length, Sqft, Height, OR %, and RCN. The first row has values 27.00, 52.00, 1404, and 100. The second row has a value of 0. There is a small icon in the bottom right corner of the table.

Width	Length	Sqft	Height	OR %	RCN
27.00	52.00	1404		100	0

Figure 33 – Dimensions Pop-Up

Width, length, height, and override percent can be modified directly in the Dimensions list. Square footage and RCN are calculated automatically from the provided values. Dimension entries can be added or removed from a segment by clicking the add or delete buttons, respectively.

Inventory Tab

The Inventory tab, shown in Figure 34, displays a list of inventory items assigned to the improvement. Additional actions for inventory are shown along with the standard list controls, as shown in Table 14.

Note: Inventory items assigned to a specific floor on the improvement will not open in this list. Clicking the All Inventory button shows every item across floors, as seen in Figure 35.

Code	Description	Size	Qty	Class	QA	Tabled RCN	Apply LCM	LCM	RCN	% Good	Tabled RMV	Entered RMV	OR %	Value	RMV
6011	APPL - COOKTOP		1	4		\$470	<input checked="" type="checkbox"/>	125%	\$588	75%	\$441	\$0	100.000%	Tabled	\$441
6029	APPL - DELUXE COOKTOP		1	4		\$700	<input checked="" type="checkbox"/>	125%	\$875	75%	\$656	\$0	100.000%	Tabled	\$656
6030	APPL - DELUXE RANGE		1	4		\$850	<input checked="" type="checkbox"/>	125%	\$1,063	75%	\$797	\$0	100.000%	Tabled	\$797
6009	APPL - DISHWASHER		1	4		\$480	<input checked="" type="checkbox"/>	125%	\$600	75%	\$450	\$0	100.000%	Tabled	\$450
Total RCN		\$3,126		Total RMV		\$2,344									

(a) Inventory List (b) Totals (c) List Controls

Figure 34 – Improvement Inventory Tab

Tool	Name	Function
	All Inventory	Shows all inventory across all improvements on the account.
	Quick Entry	Allows for quickly keying inventory additions by inventory code.

Table 14 – Additional Inventory Actions

Code	Description	FT	Size	Qty	Class	QA	Tabled RCN	Apply LCM	LCM	RCN	% Good	Tabled RMV	Entered RMV	OR %	Value	RMV
6029	APPL - DELUXE COOKTOP	1st	0	1	4		\$700	<input checked="" type="checkbox"/>	125%	\$875		\$656	\$656	100.000%	Tabled	\$656
6009	APPL - DISHWASHER	1st	0	1	4		\$480	<input checked="" type="checkbox"/>	125%	\$600		\$450	\$450	100.000%	Tabled	\$450
6010	APPL - GARBAGE DISPOSAL	1st	0	1	4		\$150	<input checked="" type="checkbox"/>	125%	\$188		\$141	\$141	100.000%	Tabled	\$141
6008	APPL - HOOD-FAN	1st	0	1	4		\$280	<input checked="" type="checkbox"/>	125%	\$350		\$263	\$263	100.000%	Tabled	\$263
7007	BATHTUB	1st	0	1	4		\$600	<input checked="" type="checkbox"/>	125%	\$750		\$563	\$563	100.000%	Tabled	\$563
7019	BATHTUB - JETTED	1st	0	1	4		\$3,300	<input checked="" type="checkbox"/>	125%	\$4,125		\$3,094	\$3,094	100.000%	Tabled	\$3,094
5049	FINISH - WD PANELING	1st	0	1	4		\$0	<input checked="" type="checkbox"/>	125%	\$0		\$0	\$0	100.000%	Entered	\$0
5045	FLOOR COVER - CARPET	1st	0	1	4		\$0	<input checked="" type="checkbox"/>	125%	\$0		\$0	\$0	100.000%	Entered	\$0
5047	FLOOR COVER - HARDWOOD	1st	0	1	4		\$0	<input checked="" type="checkbox"/>	125%	\$0		\$0	\$0	100.000%	Entered	\$0
5048	FLOOR COVER - VINYL	1st	0	1	4		\$0	<input checked="" type="checkbox"/>	125%	\$0		\$0	\$0	100.000%	Entered	\$0
4044	FOUNDATION - CONCRETE	1st	2746	0	4		\$0	<input checked="" type="checkbox"/>	125%	\$0		\$0	\$0	100.000%	Entered	\$0
5020	HVAC - HEAT PUMP	1st	3858	0	4		\$9,066	<input checked="" type="checkbox"/>	125%	\$11,333		\$8,500	\$8,500	100.000%	Tabled	\$8,500
6001	KITCHEN SINK SS SINGLE	1st	0	1	4		\$400	<input checked="" type="checkbox"/>	125%	\$500		\$375	\$375	100.000%	Tabled	\$375
7003	LAVATORY	1st	0	3	4		\$1,050	<input checked="" type="checkbox"/>	125%	\$1,313		\$985	\$985	100.000%	Tabled	\$985
4011	ROOF COVER - MED. COMP	1st	2746	0	4		\$0	<input checked="" type="checkbox"/>	125%	\$0		\$0	\$0	100.000%	Entered	\$0
4003	ROOF TYPE - GABLE ROOF	1st	2746	0	4		\$0	<input checked="" type="checkbox"/>	125%	\$0		\$0	\$0	100.000%	Tabled	\$0
7014	SHOWER W/DOOR, FIBERGLASS	1st	0	2	4		\$2,700	<input checked="" type="checkbox"/>	125%	\$3,375		\$2,531	\$2,531	100.000%	Tabled	\$2,531
4028	SIDING - CEDAR/REDWOOD	1st	2746	0	4		\$0	<input checked="" type="checkbox"/>	125%	\$0		\$0	\$0	100.000%	Tabled	\$0

Print Export Close

Figure 35 – All Inventory

Quickly Entering Inventory

Click the Quick Entry button on the inventory list. The window shown in Figure 36 will open.

The window opens with the focus on **Code**: in the example shown here, the inventory was added by keying the codes and hitting enter, one after another.

Clicking **OK** would add the inventory to the account, or if the codes were already on the account, the quantity would be increased, since **Add To Existing** is selected.

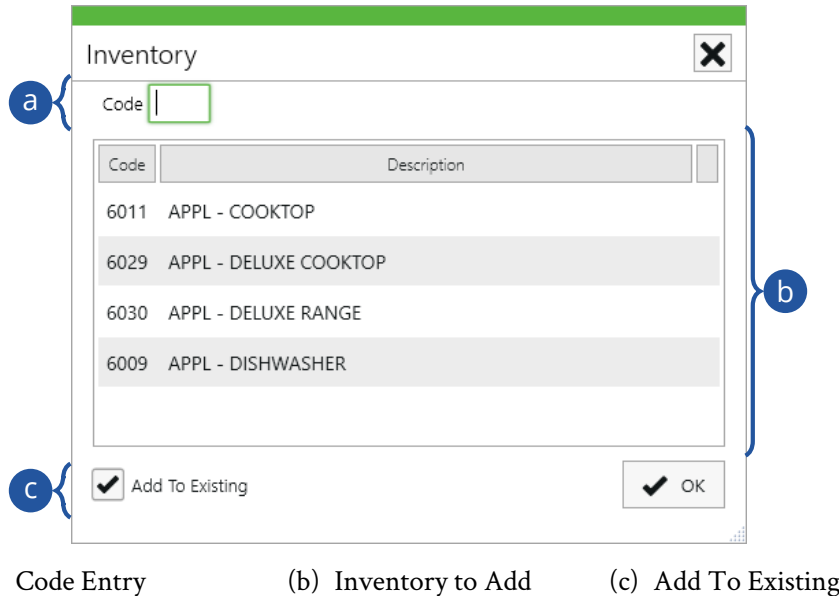


Figure 36 – Quick Entry

Editing Inventory Items

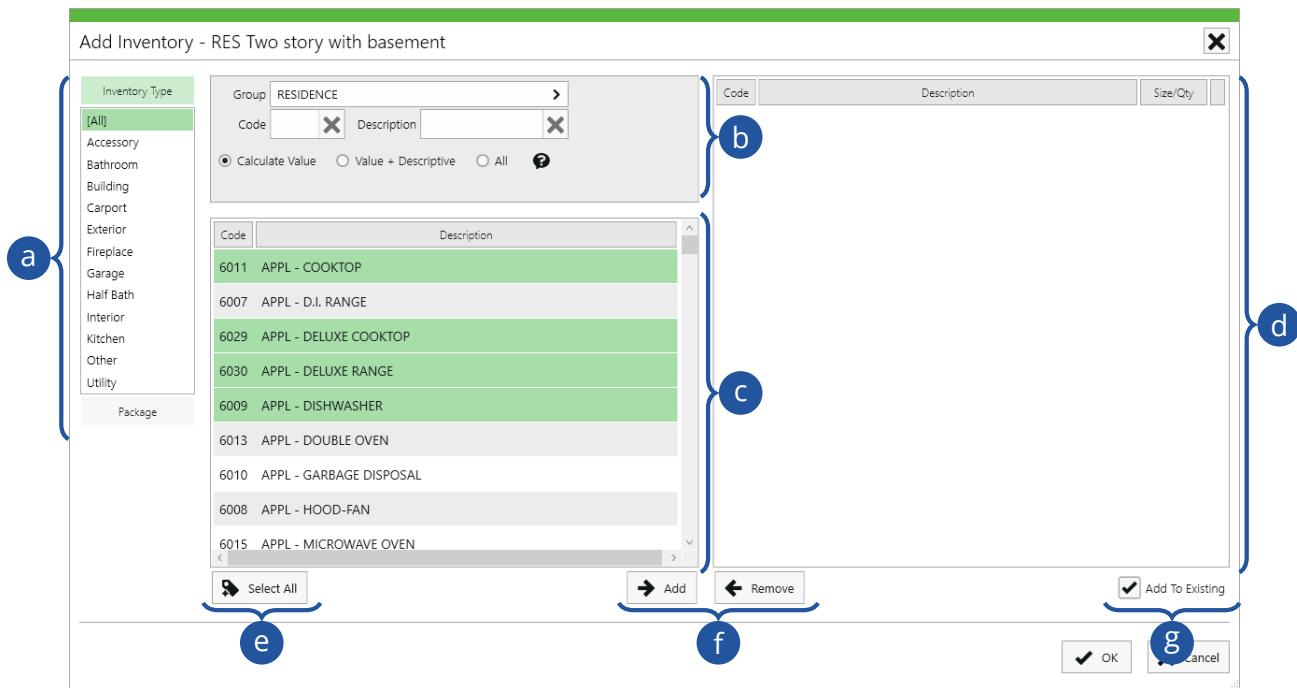
To edit inventory, select a row from the list and click the edit button. The Edit Inventory/Accessory window will open, as shown in Figure 37.

Note: The controls shown depend on the inventory type.

Figure 37 – Edit Inventory Window

Adding Inventory Items

Clicking the Add Inventory button will open the Add Inventory window, as shown in Figure 38.



- | | | |
|------------------------|-------------------------|---------------------|
| (a) Type, Package | (c) Available Inventory | (f) Add, Remove |
| (b) Filtering Controls | (d) Inventory to Add | (g) Add To Existing |
| (e) Select All | | |

Figure 38 – Add Inventory Window

Inventory Type and Package toggle the inventory categories. Group, Code, and Description filter Available Inventory, depending on the inventory code options described in Table 15.

Code Option	Description
Calculate Value	Shows only inventory codes with a matching schedule for the current book set, stat class, and class.
Value + Descriptive	Shows inventory codes as if Calculate Value were selected, but also shows inventory codes that have Has Value turned off; these additional codes are sometimes referred to as <i>descriptive</i> .
All	Shows all possible codes based on the selected filters.

Table 15 – Inventory Code Options

To select multiple inventory line items, hold the CTRL key while clicking list rows.

Clicking Add will push selected available inventory to the list on the right. If Add To Existing is selected, and the code has already been added, the quantity will be increased; if not, another line for that inventory will be added. Remove deletes the selected items from the right side.

Accessories Tab

The Accessories Tab, shown in Figure 39, displays a list of accessories associated with an improvement.

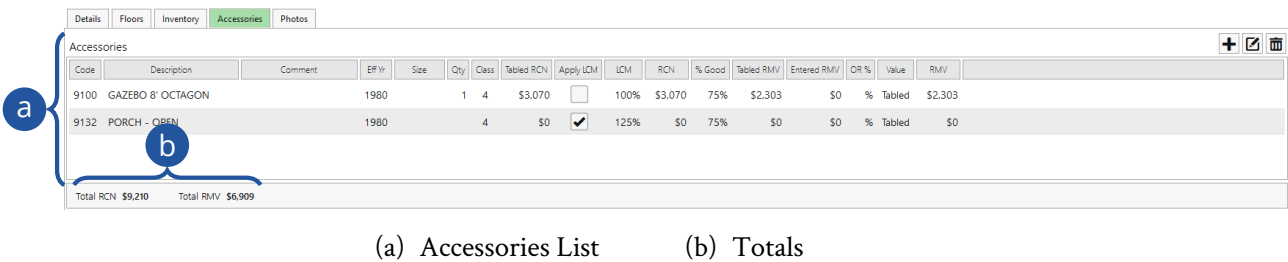


Figure 39 – Accessories Tab

Adding an Accessory

Clicking the Add Accessory button will open the Add Accessory window, shown in Figure 40.

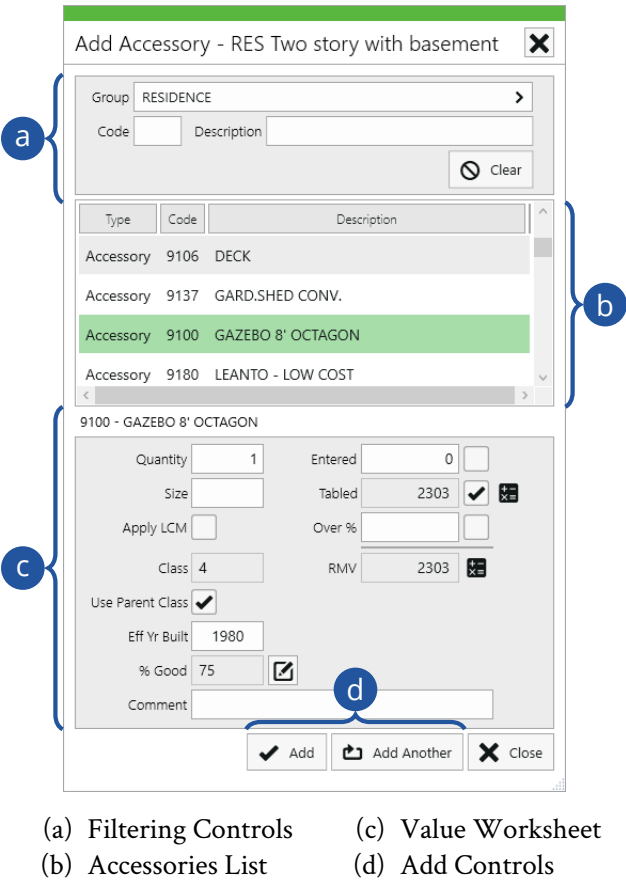


Figure 40 – Add Accessory Window

Group, Code, and Description filter the accessories list. When a single accessory is selected, a value worksheet is shown. Multiple accessories can be selected and added at the same time by holding the CTRL key.

Clicking Add will add the selected accessories to the improvement and close the window; clicking Add Another will add the selected accessories to the improvement, but will keep the window open so that additional accessories can be added.

Editing an Accessory

To edit an accessory, select it and click the edit button. The Edit Inventory/Accessory window will open, as shown in Figure 41.

Note: The editing controls shown depend on the accessory type and class.

The screenshot shows the 'Edit Inventory / Accessory' window with a green title bar and a close button (X) in the top right corner. The main content area is titled '9100 - GAZEBO 8' OCTAGON'. Below the title, there are several input fields and checkboxes arranged in a grid-like fashion:

- Quantity:** A text box containing the value '1'.
- Entered:** A text box containing the value '0'.
- Size:** An empty text box.
- Tabled:** A text box containing the value '2303', followed by a checked checkbox and a small icon with '+', '-', and '=' symbols.
- Apply LCM:** An unchecked checkbox.
- Over %:** An empty text box.
- Class:** A text box containing the value '4'.
- RMV:** A text box containing the value '2303', followed by a small icon with '+', '-', and '=' symbols.
- Use Parent Class:** A checked checkbox.
- Eff Yr Built:** A text box containing the value '1980'.
- % Good:** A text box containing the value '75', followed by a small icon with a checkmark.
- Comment:** A large empty text area at the bottom.

At the bottom of the window, there are three buttons: 'Prev' (with a left arrow icon), 'Next' (with a right arrow icon), and 'OK' (with a checkmark icon).

Figure 41 – Edit Accessory Window

MS Account Tab

Where MS improvements are present, an additional tab opens, as shown in Figure 42.

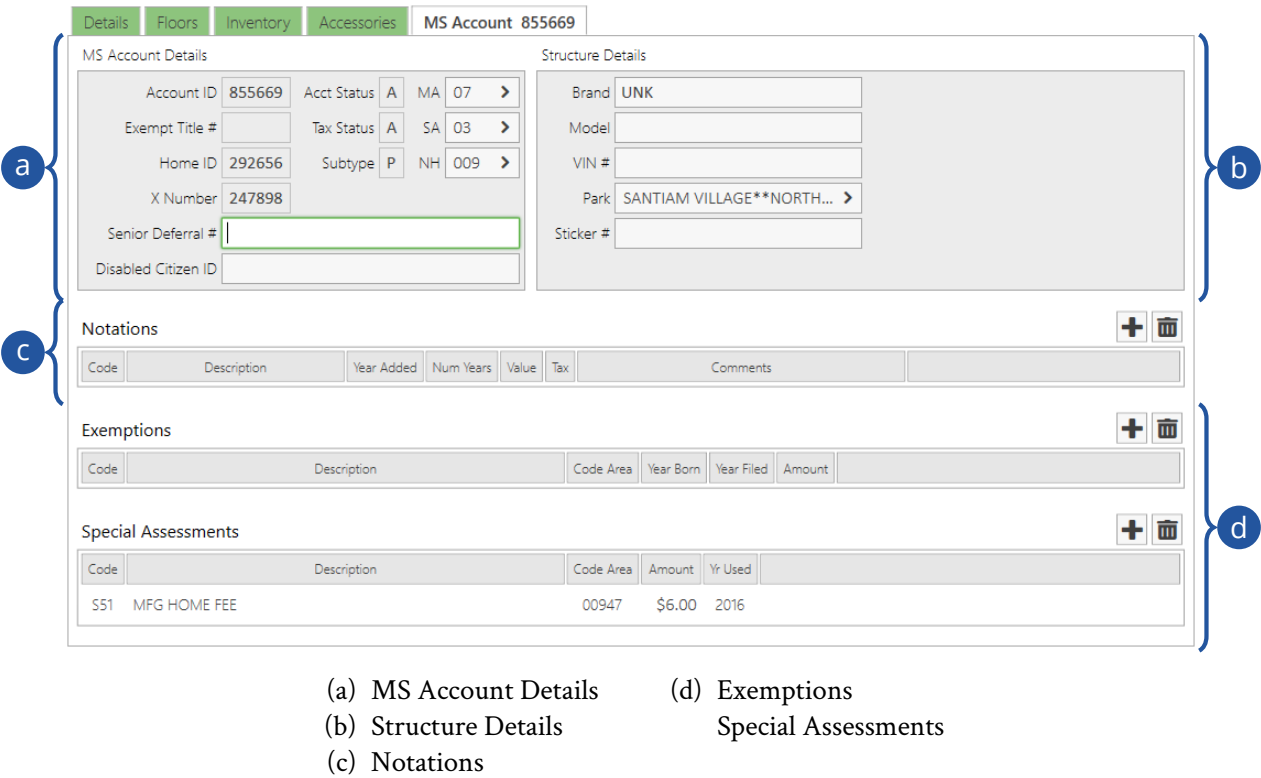


Figure 42 – MS Account Tab

The MS Account tab contains tools for editing MS account and structure details. It also displays lists for notations, exemptions, and special assessments specific to the MS account. Exemptions and Special Assessments lists are conditionally displayed depending on county settings and MS type.

Commercial Workspace

When viewing a commercial improvement, the workspace in Figure 43 is displayed.

The screenshot displays the Commercial Workspace interface, which is divided into three main sections labeled (a), (b), and (c).

(a) Commercial Details: This section is located on the left side of the interface. It contains a form for entering commercial details, including Code Area (02710), Year Built, Frozen Year, Exempt %, RMV (Entered, Tabled, Over %, Base, Trend %, Final RMV, SAV, MSAV), and MAV (Entered, Allocated, Exception, Final MAV, Entered AV, Tabled AV, Final AV).

(b) Value Matrix: This section is located in the middle-left area. It displays a table of available land fragments. The table has columns for ID, Code Area, Map, Account, Size, Frag RMV, OSD, Value Source, and Land Class. The data is as follows:

ID	Code Area	Map	Account	Size	Frag RMV	OSD	Value Source	Land Class
02710	09501E180000100	22	162.26	A 235500	0			
02710	09501E180000100	22	2.87	A 4170	0			
02710	09501E180000100	22	1	A 1460	55000			
02710	09501E180000100	22	51	A 74020	0			
02710	09501E180000200	30	51	A 1000	0			

(c) Commercial Property Application: This section is located on the right side of the interface. It contains a form for entering commercial property application details, including Description, Stat Class (235 - House Converted 2-4 units), Notes, Total Sqft, MA-SA-NH, and OS-00-000. It also includes a summary section with links for Value Summary, Land Fragments, and Accounts. A yellow banner at the top of this section reads "You Must Associate Land With This Commercial Appraisal".

- (a) Commercial Details (c) Commercial Property Application
(b) Value Matrix

Figure 43 – Commercial Impr. Workspace

The Code Area, Year Built, Frozen Year, Exempt Percent, as well as the configuration for the final AV calculation for the commercial improvement, can be edited from this workspace. The interface and tools from the Commercial Property application can also be accessed from this workspace.

Land Workspace



The land workspace, shown in Figure 44, displays a list of the land fragments, on-site developments, land adjustments, fire patrol, and size totals on the account.

Property Appraisal

Save Transaction 2017 - 1956618 / Account #293841 / Land Summary ✓ Operation: ANY OTHER - Task: ANY OTHER - Assigned To: Z*ORCATS

Account 293841 Year 2017 Map 14S01E00-00-04900 Account Land Impr. Value Misc. 1 of 1

Owner FRANK JN MCCUBBINS TRUST ETAL Situs 43474 AMES CREEK RD SWEET HOME, OR 97386-9706

Overall Land Class Overall RMV Land Use Code Overall SAV Land Use Code

Land Fragments

ID	Code Area	Description	Size	Land Class	LUC	RMV	MAV	SAV	MSAV	SAV LUC	Fire District	Fire Patrol
3	05502	Small Tract Forest land	2.02	FB	004	\$4,100	\$0	\$330	\$210	013	✓	
5	05502	Small Tract Forest land	50.00	FB	004	\$101,250	\$0	\$8,260	\$5,240	013		
6	05502	Market	2.58		004	\$5,230	\$5,160	\$0	\$0		✓	
8	05502	Farm Use Unzoned	47.01	4	004	\$95,190	\$0	\$38,407	\$16,134	013	✓	
11	05502	Forest Site	1.00		004	\$7,030	\$0	\$1,520	\$1,520	013	✓	
Total Sqft 0						Total Acres 102.61	Total RMV \$212,800	Total MAV \$5,160	Total SAV \$48,517	Total MSAV \$23,104		

On-Site Developments

Code Area	Description	RMV	MAV	SAV	MSAV
05502	120 - SPECIAL ASSESSED OSD	\$25,000	\$0	\$4,000	\$4,120
Total RMV \$25,000		Total MAV \$0			

Land Adjustments

Code	LUC	Description	RMV
LG	005	LANDSCAPE - GOOD	\$5,000
RURL	004	RURAL LAND ADJ.	(\$23,088)
Total RMV (\$18,088)			

Fire Patrol

☒ Has Fire Patrol
 ☒ Surcharge \$47.50
 ☒ Surcharge Code Area 05502

(ORCATS) DSQL2016/LinnTestORCATS • ORCATS

Figure 44 – Land Workspace

Land Fragments

To add or edit a land fragment, interact with the Land Fragments list, shown in Figure 45. The land fragments workspace will open, as shown in Figure 46.

Land Fragments + ✎ 🗑

ID	Code Area	Description	Size	Land Class	LUC	RMV	MAV	SAV	MSAV	SAV LUC	Fire District	Fire Patrol	
3	05502	Small Tract Forest land	2.02	FB	004	\$4,100	\$0	\$330	\$210	013	<input checked="" type="checkbox"/>		✎
5	05502	Small Tract Forest land	50.00	FB	004	\$101,250	\$0	\$8,260	\$5,240	013	<input type="checkbox"/>		✎
6	05502	Market	2.58		004	\$5,230	\$5,160	\$0	\$0		<input checked="" type="checkbox"/>		✎
8	05502	Farm Use Unzoned	47.01	4	004	\$95,190	\$0	\$38,407	\$16,134	013	<input checked="" type="checkbox"/>		✎
11	05502	Forest Site	1.00		004	\$7,030	\$0	\$1,520	\$1,520	013	<input checked="" type="checkbox"/>		✎
Total Sqft 0			Total Acres 102.61	Total RMV \$212,800	Total MAV \$5,160	Total SAV \$48,517	Total MSAV \$23,104						

Figure 45 – Land Fragments List

Site 3 + ✎ 🗑 1 of 5 ▶

a

RMV Class 401 - H & B Use Rural Tract Improved

Code Area 05502 ☒ Use Parent RMV Class

Physical Size 2.02 Acres

Valuation Size 2.02 Acres ☒

☒ Fire District ☐ Exempt ☐ Calculate Separate

Fire Patrol

b

Land Class FB > Class B Forest Value

Value Source Small Tract Forest land

RMV Land Use 004 > Rural Tract

Plan Zone

SAV Land Use 013 > Special Assessment Zone 3

c

Comments

d

On-Site Developments

Description	RMV	SAV	MSAV	Attached
120 - SPECIAL ASSESSED OSD	\$25,000	\$4,000	\$4,120	

e

Land Adjustments

Code	LUC	Description	RMV	Attached
LG 005		LANDSCAPE - GOOD	\$5,000	
RURL 004		RURAL LAND ADJ.	(\$23,088)	<input checked="" type="checkbox"/>

f

Value Matrix

Entered	0	0	0
Allocated	4550	1668	1058
Land Adj.	100,000	20,000	20,000
Land Adj.	-455		
Base	4095		
Trend %	100.00		
Final	4100	330	210

MAV

Entered 0 |

Allocated 0 |

Exception 0 |

Final MAV 0 |

Entered AV 211 |

Tabled AV 210 |

Final AV 210 |

(a) Land Fragment Details

(b) Edit Size

(c) Comments

(d) On-Site Developments

(e) Land Adjustments

(f) Value Matrix

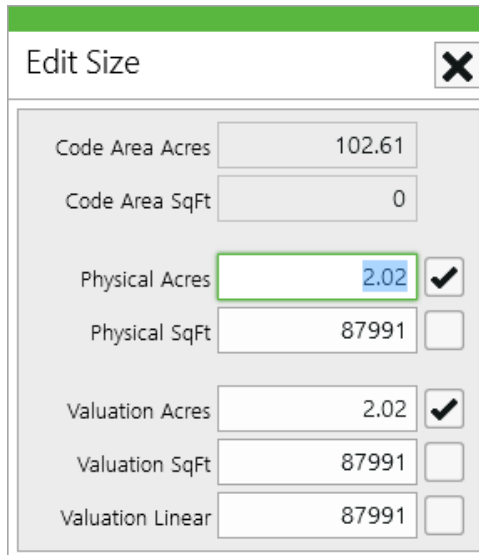
Figure 46 – Land Fragments Workspace

In addition to the RMV controls, the land fragments value matrix also includes controls for configuring the SAV and MSAV.

All on-site developments and land adjustments on the account are listed in this workspace, whether they are associated with the selected land fragment or not. On-site developments and land adjustments can be created and edited from this workspace by interacting with the corresponding list.

Edit Land Fragment Size

Click **Edit Size** to edit the size values for a land fragment. The Edit Size pop-up will open, as shown in Figure 47.



The 'Edit Size' pop-up dialog box features a green header bar with the title 'Edit Size' and a close button (X). The main content area is a light gray box containing several input fields and checkboxes. The fields are arranged in pairs, with the unit of measurement indicated by the label. The 'Physical Acres' field is highlighted with a green border and contains the value '2.02'. The 'Valuation Acres' field also contains '2.02'. The 'Physical SqFt' and 'Valuation SqFt' fields both contain '87991'. The 'Valuation Linear' field contains '87991'. Checkboxes are present next to the 'Physical Acres' and 'Valuation Acres' fields, both of which are checked.

Field	Value	Unit	Checked
Code Area Acres	102.61	Acres	
Code Area SqFt	0	SqFt	
Physical Acres	2.02	Acres	<input checked="" type="checkbox"/>
Physical SqFt	87991	SqFt	<input type="checkbox"/>
Valuation Acres	2.02	Acres	<input checked="" type="checkbox"/>
Valuation SqFt	87991	SqFt	<input type="checkbox"/>
Valuation Linear	87991	Linear	<input type="checkbox"/>

Figure 47 – Edit Size Pop-Up

Select between acres, square feet, and linear square feet to choose a unit appropriate for the fragment. The selected unit of measure is displayed in details about the land fragment and used in value calculations. When a size is entered for one of the units, that value is automatically converted into the other units and displayed in the corresponding textbox.

On-Site Developments

To add or edit an on-site development, interact with the On-Site Developments list shown in Figure 48. The on-site development workspace will open, as shown in Figure 49.

On-Site Developments +

Code Area	Description	RMV	MAV	SAV	MSAV
05502	120 - SPECIAL ASSESSED OSD	\$25,000	\$0	\$4,000	\$4,120
Total RMV		\$25,000	Total MAV		\$0

Figure 48 – On-Site Developments List

On-Site Developments +

Code Area

Description

RMV

SAV

MSAV

05502

120 - SPECIAL ASSESSED OSD

\$25,000

\$4,000

\$4,120

RMV Class

401 - H & B Use Rural Tract Improved

Code Area

05502 > ☒ Use Parent RMV Class

OSD Code

120 > SPECIAL ASSESSED OSD > ☐

Comments

RMV

SAV

MSAV

Entered

0

Tabled

25000

☒

Over %

100.000

Base

25000

Trend %

100.00

☒

Final

25000

Final

4000

Final

4120

MAV

Entered

0

Allocated

0

☒

Exception

0

☒

Final MAV

0

Entered AV

4000

Tabled AV

4000

☒

Final AV

4000

Fragments

Code Area

Description

RMV

Associated

05502

Site 3 Small Tract Forest land Size 2.02 Code Area 05502

\$4,100.00

☐

05502

Site 5 Small Tract Forest land Size 50 Code Area 05502

\$101,250.00

☐

(a) OSD List

(b) OSD Details

(c) Value Matrix

(d) Fragments List

Figure 49 – On-Site Development Workspace

In addition to the RMV controls, the value matrix in the workspace includes controls for configuring the SAV and MSAV for the on-site development.

All the land fragments on the account are displayed in the Fragments list in this workspace. However, only the fragments with Associated selected are part of the selected on-site development. Land fragments can be edited from this workspace by interacting with the Fragments list.

Property Appraisal—Software Manual

Land Adjustments

To add or edit a land adjustment, interact with the Land Adjustments list shown in Figure 50. The land adjustments workspace will open, as shown in Figure 51.

Land Adjustments					
Code	LUC	Description	RMV		
LG	005	LANDSCAPE - GOOD	\$5,000		
RURL	004	RURAL LAND ADJ.	(\$23,088)		
Total RMV			(\$18,088)		

Figure 50 – Land Adjustments List

Land Adjustments

Code	LUC	Description	RMV
LG	005	LANDSCAPE - GOOD	\$5,000
RURL	004	RURAL LAND ADJ.	(\$23,088)

Land Use Code

005

>

Resource

>

Land Adjustment

LG

>

LANDSCAPE - GOOD

>

Comments

RMV

Entered

5000

☒

Tabled

0

☐

Over %

100.000

☐

Final

5000

☐

Acres

Entered

1

Sqft

43560

Tabled

1

43560

Final

1

43560

Fragments

Code Area	Description	Starting RMV	Adjustment RMV	Fragment RMV	Associated
05502	Site 3 Small Tract Forest land Size...	\$4,550	\$0	\$4,100	<input type="checkbox"/>
05502	Site 5 Small Tract Forest land Size...	\$112,500	\$0	\$101,250	<input type="checkbox"/>
05502	Site 6 Market Size 2.58 Code Area...	\$5,810	\$0	\$5,230	<input type="checkbox"/>
05502	Site 8 Farm Use Unzoned Size 47.01...	\$105,770	\$0	\$95,190	<input type="checkbox"/>
05502	Site 11 Forest Site Size 1 Code Area...	\$2,250	\$5,000	\$7,030	<input checked="" type="checkbox"/>

- (a) Adjustments List (c) Value Matrix
(b) Adjustment Detail (d) Fragments List

Figure 51 – Land Adjustments Workspace

To associate an adjustment with a fragment, select **Associated** from the Fragments list.

Fire Patrol Controls (Land)

Controls for editing fire patrol information from the land workspace are shown in Figure 52.

Fire Patrol

☒ Has Fire Patrol ☒ Surcharge \$47.50 ☐ Surcharge Code Area 05502 >

(a) Surcharge Amount (b) Set Surcharge Amount (c) Edit (Fire Patrol Workspace)

Figure 52 – Fire Patrol Controls

To apply fire patrol to the account, select **Has Fire Patrol**. Selecting this option will open the **Fire Patrol Workspace**.

Clicking **Set Surcharge Amount** will open the **Surcharge Amount** pop-up, shown in Figure 53.

Surcharge Amount

Entered Amount

Tabled Amount 47.50 ☒

Final Amount 47.50

Figure 53 – Surcharge Amount Pop-up

The surcharge amount can either be entered or calculated from a tabled value, depending on the option selected. The final amount shown in the pop-up will be displayed as the surcharge amount in the fire patrol controls.

Size Totals



The size total lists, shown in Figure 54, show the total square feet and acres for the account, appraisal units, and contiguous units. Also shown is the total land RMV for the account.

Account Size

Total Sqft

0

Total Acres

217.13

Code Area

Sqft

Acres

02710

217.13

Appraisal Unit Size

Total Sqft

0

Total Acres

217.64

Account ID

Sqft

Acres

22

0

217.13

30

0

0.51

Contiguous Unit Size

Total Sqft

0

Total Acres

217.64

Account ID

Sqft

Acres

22

0

217.13

30

0

0.51

Land Totals

Total Fragment RMV

\$371,870

Total OSD RMV

\$55,000

Total Land RMV

\$426,870

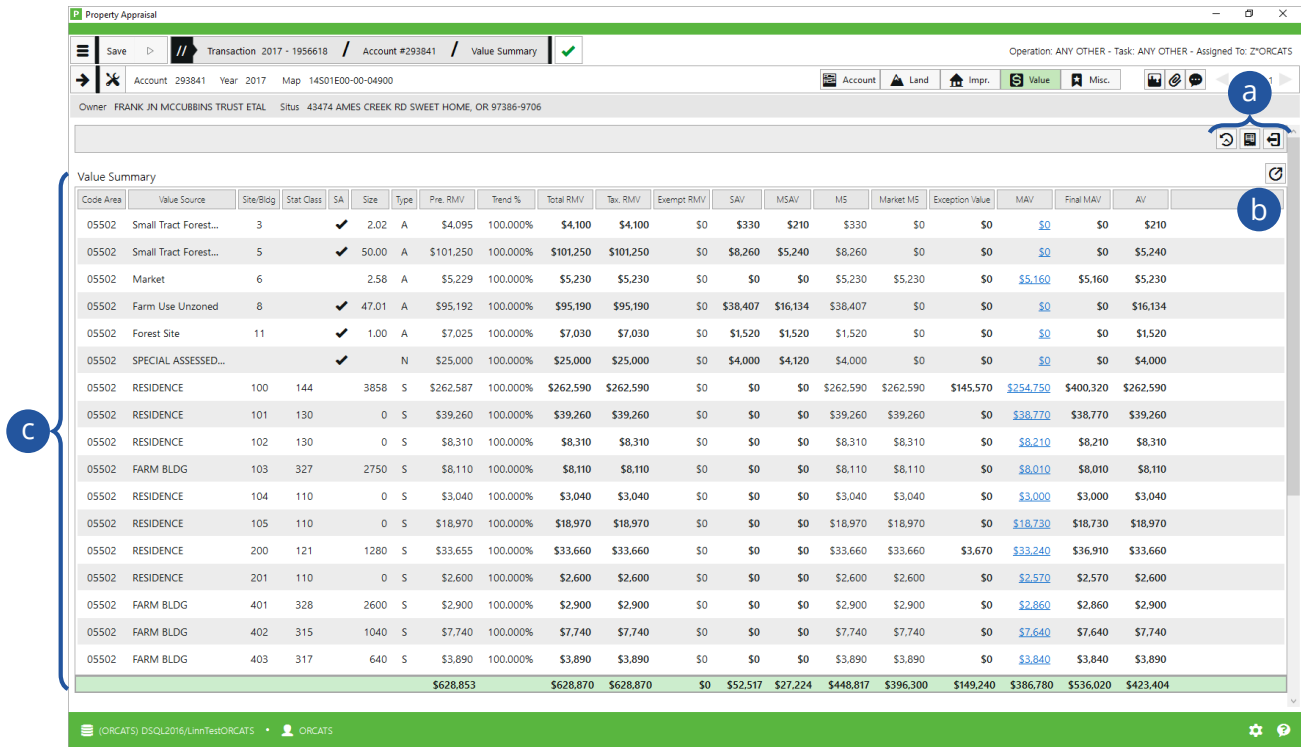
Figure 54 – Size Totals Lists

These lists begin in a collapsed state; click the button to expand the breakdown of the square feet and acres across the account, appraisal unit, or contiguous unit.

Values Workspace



The values workspace is shown in Figure 55. This workspace displays the following lists: Value Summary, Tax Account Totals, Land/Impr Summary, and Exceptions. The values toolbar is described in Table 16.



(a) Values Toolbar (b) Export Value Summary
(c) Value Summary List

Figure 55 – Values Workspace

Tool	Name	Function
	Transaction History	Opens the Transaction History.
	MAV Allocation	Opens MAV Allocation.
	Undock Content	Undocks the values workspace to its own window.

Table 16 – Values Toolbar

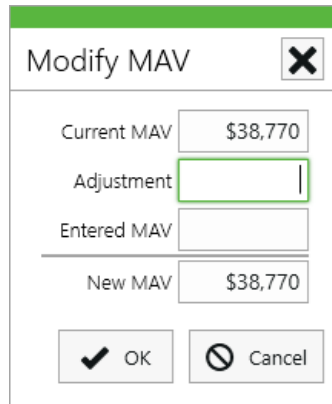
Value Summary

The Value Summary list displays the value sources for the account.

Double-clicking an item in the list will open the workspace associated with that value source. For example, a value source of `RESIDENCE` would open in the improvements workspace, while a value source of `Forest Site` would open in the land fragments workspace.

To create an Excel spreadsheet from the list, click `Export Value Summary`.

The MAV column of the list provides a way to quickly adjust MAV; click the column value and the Modify MAV window will open, as shown in Figure 56.




The image shows a 'Modify MAV' dialog box. It has a title bar with the text 'Modify MAV' and a close button (X). The dialog contains four input fields: 'Current MAV' with the value '\$38,770', 'Adjustment' (empty), 'Entered MAV' (empty), and 'New MAV' with the value '\$38,770'. At the bottom are 'OK' and 'Cancel' buttons.

Figure 56 – Modify MAV Window

Exceptions

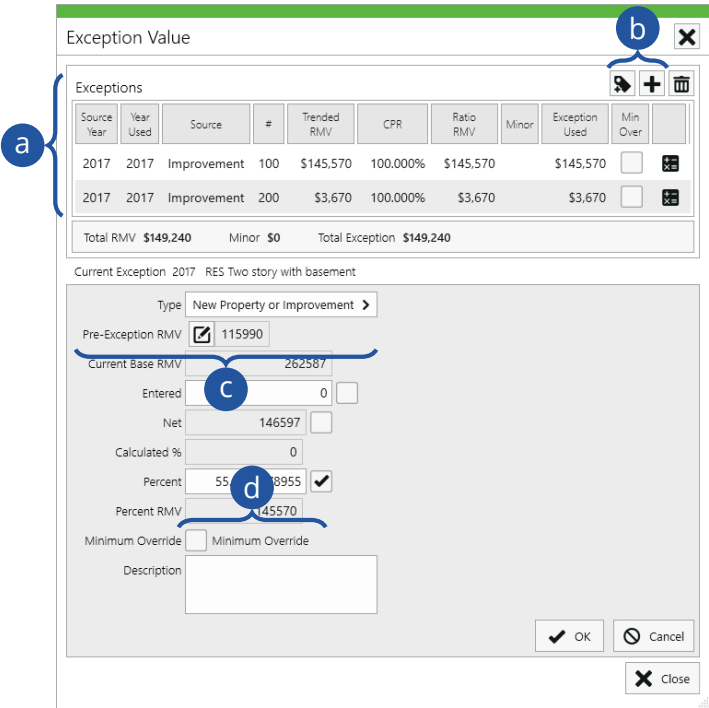
The Exceptions list, shown in Figure 57, displays information about exceptions on the account. To work with exceptions, interact with the list to open the Exception Value window, shown in Figure 58. Tools for the window are shown in Table 17.

To ensure the exception is used even if the value falls below the statutory threshold, select `Minimum Override`.

Exceptions 

Source	Type	Description	Item Description	Year Added	Year Used	RMV	CPR	Ratio RMV	
Improvement	New Property or Improvement		Bldg 100 RES Two story with basement 144	2017	2017	\$145,570	100.000%	\$145,570	
Improvement	New Property or Improvement		Bldg 200 RES One story 121	2017	2017	\$3,670	100.000%	\$3,670	

Figure 57 – Exceptions List



- (a) Exception Value List
- (b) Add All Exceptions
Add Exception
- (c) Set Pre-exception RMV
(d) Minimum Override

Figure 58 – Exception Value Window




Tool	Name	Function
	Add All Exceptions	Adds all value sources to the exceptions.
	Add Exceptions	Shows a list of value sources. (Select an item to add it as an exception.)
	Set Pre-Exception RMV	Toggles editing of <code>Pre-Exception RMV</code> on and off.

Table 17 – Exception Value Window Tools

Miscellaneous Workspace



The miscellaneous workspace, shown in Figure 59, displays lists of notations, special assessments, exemptions, fire patrol, and appraisal maintenance on the account.

Property Appraisal

Save Transaction 2017 - 1956618 / Account #293841 / Misc ✓

Operation: ANY OTHER - Task: ANY OTHER - Assigned To: ZORCATS

Account 293841 Year 2017 Map 14501E00-00-04900

Owner: FRANK JN MCCUBBINS TRUST ETAL Situs: 43474 AMES CREEK RD SWEET HOME, OR 97386-9706

Notations

Code	Description	Year Added	Num Years	Value	Tax	Comments
501	POT'L ADD'L TAX...	2009		\$0.00	\$0.00	
100	FIRE PATROL	2015				

Special Assessments

Code	Description	Code Area	Amount	Yr Used	
S01S	FORESTRY FIRE TIMBER - SOUTH	05502	\$71.63	2017	▲
S02N	FORESTRY FIRE SURCHARGE - NORTH	05502	\$47.50	2017	▲

Exemptions

Code	Description	Code Area	Amount
		05502	\$24.191

Fire Patrol ✓ Surcharge \$47.50

Code	Acres	Description	Amount
S01S	52.61	FORESTRY FIRE TIMBER - SOUTH	\$71.63

Appraisal Maintenance

Year	Status	Operation	Type	Remarks	Permit	Value	
2016	C	COMBINATION - TO		RED TAG AUTO-GENERATED FROM ACCOUNT MANAGER V#1714374			
2018	N	CONVERSION	CORRECTION - OTHER	Added job for value comparison following conversion.			

(ORCATS) DSQL2016/LinnTestORCATS • ORCATS

Figure 59 – Miscellaneous Workspace

Notations

To work with notation items, interact with list shown in Figure 60. Adding an item will open the window shown in Figure 61. Editing an item will display the workspace shown in Figure 62.

Notations

+

Code	Description	Year Added	Num Years	Value	Tax	Comments
501	POT'L ADD'L TAX...	2009		\$0.00	\$0.00	
100	FIRE PATROL	2015				

Figure 60 – Notations List

Add Notation

✕

Notation

>

Year Added

2017

Value

Num Years

Tax

Comments

✓ OK

⊗ Cancel

Figure 61 – Add Notation Window

Notations

+

Code	Description	Year Added	Num Years	Value	Tax	Comments
501	POT'L ADD'L TAX LIABILITY	2009		\$0.00	\$0.00	
100	FIRE PATROL	2015				

Notation

POT'L ADD'L TAX LIABILITY

>

Comments

Year Added

2009

Value

0.00

Num Years

Tax

0.00

Figure 62 – Notations Workspace

Special Assessments

To work with special assessment items, interact with list shown in Figure 63. Adding an item will open the window shown in Figure 64. Editing an item will display the workspace shown in Figure 65.

Special Assessments + ✎ 🗑

Code	Description	Code Area	Amount	Yr Used	
S01S	FORESTRY FIRE TIMBER - SOUTH	05502	\$71.63	2017	🔥
S02N	FORESTRY FIRE SURCHARGE - NORTH	05502	\$47.50	2017	🔥

Figure 63 – Special Assessments List

Add Special Assessment ✕

Type

Year Used Tabled Amount

Code Area Entered Amount

Final Amount

Comments

☒ OK ☐ Cancel

Figure 64 – Add Special Assessment Window

Special Assessments + 🗑

Code	Description	Code Area	Amount	Yr Used	
S01S	FORESTRY FIRE TIMBER - SOUTH	05502	\$71.63	2017	🔥
S02N	FORESTRY FIRE SURCHARGE - NORTH	05502	\$47.50	2017	🔥

Type

Year Used Tabled Amount

Code Area Entered Amount

Final Amount

Comments

[🔥 Edit in Fire Patrol](#)

Figure 65 – Special Assessments Workspace

Exemptions

To work with exemption items, interact with list shown in Figure 66. Adding an item will open a menu with locally configured exemption types. Editing an item will display the workspace shown in Figure 67.

Exemptions

+

Code	Description	Code Area	Amount
05502			\$24,191

Figure 66 – Exemptions List

Exemptions

+

Code	Description	Code Area	Year Born	Year Filed	Amount
VS	VETERANS EXEMPTION SERVICE RELATED	05502	1960	2017	\$24,191

Exemption

VETERANS EXEMPTION SERVICE RELATED

>

Code Area

05502

>

Tabled Amount

24191

☒

Entered Amount

☐

Final Amount

24191

Phone

Year Born

1960

Letter Year

2017

Claim Type

>

Income

Dependents

Ownership

>




Figure 67 – Exemptions Workspace

Appraisal Maintenance

To work with appraisal maintenance items, interact with list shown in Figure 70. Adding an item will open the window shown in Figure 71. Editing an item open the window shown in Figure 72.

Note: System-generated appraisal maintenance items may not be edited, and appraisal maintenance changes are saved immediately, rather than as part of finalizing a transaction.


Appraisal Maintenance



Year	Status	Operation	Type	Remarks	Permit	Value	
2016	C	COMBINATION - TO		RED TAG AUTO-GENERATED FROM ACCOUNT MANAGER V#1714374			
2018	N	CONVERSION	CORRECTION - OTHER	Added job for value comparison following conversion.			

Figure 70 – Appraisal Maintenance List

Add Appraisal Maintenance



Operation

Type


Year


2018

Worked

☐

Remarks

 Note: Changes will be saved immediately

 Save



 Cancel

Figure 71 – Add Appraisal Maint. Window

Modify Appraisal Maintenance



Operation

CONVERSION

Type

CORRECTION - OTHER

Year


2018


Worked

☐

Remarks

Added job for value comparison following conversion.

 Note: Changes will be saved immediately

 Save


 Cancel

Figure 72 – Modify Appraisal Maint. Window