iasWorld

a tyler appraisal & tax solution

Property Records Management User Guide

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Table of Contents

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1 Overview

The iasWorld User Guide includes all the information you need to use the powerful iasWorld property management features, which includes options to locate and review property records, manage documents and photos associated with the individual property records, and select and save property records to lists. Searching, reviewing, and lists enable you to locate property records using very precise, assessment-specific criteria on demand, review comprehensive property details that are always current, maintain lists of property records of interest, and share your personal lists with selected users.

The information you will find in the iasWorld User Guide will assist you in using the following features:

- **Property Records Text Search**: The flexible text search options enable you to quickly and easily locate property records to meet the requirements of your day-to-day work.
- **View Property Record Details**: The iasWorld database contains hundreds of details about each individual property record it contains. These details are organized into customized categories for your organization, provided on individual pages, with flexible options to browse, print or save the details you find, or select property records and save them to lists.
- **Manage Documents and Photos**: The iDoc iTool enables you to manage documents or photos for individual property records. Depending on access permissions, you can attach, change attributes for, view, download, copy, move or delete documents or photos.
- **Map Search**: The map search option provides comprehensive navigation options on a map display, and enables you to select parcels, view, print or save details about them, and save them to lists.
- **Lists**: The lists feature enables you to save groups of property records that you are intrested in, and retrieve them in seconds. Property records can be saved in new lists or appended to existing lists, and lists can be shared and copied.

In addition, this user guide includes details about configuring several iasWorld features that support your work. You can choose any internal page in iasWorld to use as the contents of your home page, and select items on the iasWorld digital dashboard feature to support your day-to-day work. The digital dashboard tracks the items you have been using and enables you to continue working with them, provides automatic lists of urgent items that require your attention, and also provides an internal company notice board.

This section of the iasWorld User Guide includes overview information about the features described in the rest of the documentation, and getting started details, including information about changing your personal information and password.

This overview includes the following sections:

Overview of Customizing Your Workspace

Overview of Using Property Records

Overview of Using Lists

Getting Started

Overview of Customizing Your Workspace

You can make a number of changes in your iasWorld workspace to customize it for your work. These changes are permanent for you, but do not effect other iasWorld users. Some of these changes are important when you first login to iasWorld (for example, you should review your personal details to ensure they are accurate), while other options can be changed periodically to support changes to the way you are using iasWorld. For complete details, see Customizing Your iasWorld Workspace.

- **Selecting Dashboard View Contents**: The dashboard views provide general organization news, links to what you were last using in iasWorld, and links to items you need to be aware of immediately, such as iRespond incidents that require action. You can create two personal dashboard views, and include any of the available items on either. You can switch between your personal views with a single click to access the different items.
- **Updating Your Personal Details**: Your personal details are used in iasWorld to identify items you have created or changed, and in some cases, are used to identify you to other iasWorld users and members of the public. You should check these details when you first login to ensure they are correct.
- **Changing Your Password**: If you login to iasWorld, the first time you login, you should change your password. In addition, you can change your password periodically, before it expires. Note, however, if you use your Windows password to login to iasWorld, if you change it in iasWorld, you also change it in Windows.

Overview of Using Property Records

The property records feature enables you to locate property records with either a detail, such as a street name, or visually, by selecting an area on a map. Once you have selected property records, there are a number of powerful options available to review details about them. Additionally, iasWorld includes a number of optional features that enable you to print property records, create reports about them, or add them to lists.

- **Using the Property Record Text Search Options**: The text search options are very flexible. You can use a specific search item, such as a property ID, to locate a single property record, or a very general search item, such as a property grade, to locate a large group of property records. Several specialized search options support specific information needs, such as the Sales search option, which includes details such as price range, sale date and assessed value. For details, see Text Search for Property Records.
- **Reviewing Property Record Details**: After locating property records, the details pages provide comprehensive information about each property record, organized into categories on separate pages, such as a tax history and permits. Depending on the features your administrator has enabled, you may also be able to print the property record details, or create and save reports about them. For details about using reports, see Using Reports.
- **Manage Documents of Photos Associated with Individual Property Records**: You may have access to documents or photos that are attached to individual property records. Documents and photos attached to individual property records are managed with the iDoc iTool, which provides options to find, download and view, add, move, copy and delete documents or photos. For details, see Using iDoc.
- **Using the Map Search Feature**: The Map Search feature provides a map view that you can use to locate and select property records. The map view may include several display options, such as street details or local topographical characteristics. Using the navigation and zoom options, you can zoom in on a specific neighborhood or street, and view the parcels it contains. You can then use any of the powerful selection tools to select the individual parcels on the display. Depending on the features your administrator has enabled, you may be able to view information about the property records in a data panel beside the map display. Alternatively, you can display the details about the selected property records on the details pages. For details, see Map Search for Property Records.
- **Using a Buffer or Neighborhood Search**: The Buffer Search feature enables you to locate property records by proximity to a selected property record (or several property records), and the Neighborhood Search feature enables you to locate all other property records sold in a pre-determined period (usually 18 months from the current date) in the same neighborhood code as a selected property. Both these search options may be available in the search results table or on any of the search results details pages (depending on what your administrator has selected). For details, see Text Search for Property Records.

Overview of Using Lists

The lists option enables you to create permanent lists of property records that you want to retrieve. Lists can be updated by adding or removing property records, as required, to keep them current with your needs. Each time a list is retrieved, the most current details in the iasWorld database display. Lists can be shared with other users. Only the owner can change list properties, which includes the name and the property records it contains, but other users can make personal copies, after which they can make any required changes. For complete details, see Using Lists.

- **Creating Lists from Property Record Search Results**: Lists created from a property record search can be based on any detail of the search, such as a street name. You select individual property records on the results list for your list, enabling you to review individual property records before using them.
- **Creating Lists from Map Search Results**: Lists created from a map search are based on visual selections on a map. You can zoom in on areas on the map to view parcel outlines, and select parcels to view more extensive details in an information panel. The map display includes a number of flexible selection tools to select property records, such the line tool, which enables you to draw a line using multiple points, and select all property records that touch the line. After selecting property records, you can switch from the map display to the standard data details option to review the property record details before saving them for your list.
- **Creating Lists from Buffer or Neighborhood Search Results**: Lists created from a buffer search are based on proximity to one or several selected parcels. After locating and selecting the base property record(s), you specify the distance around them that includes the other property records you want to select. Lists created from a neighborhood search are based on a neighborhood code. After locating and selecting the base property record(s), you can view all other property records in the same neighborhood that have been sold in a pre-determined time period (usually 18 months from the current date).
- **Sharing and Unsharing Lists**: A shared list is visible to all other iasWorld users. Other users can use the list to retrieve property records and review their details, and both append the property records on it to another list, or use them as the basis of a new list. However, only the owner of a list can change its attributes or add and remove the property records it contains.

Getting Started

This section describes the steps for logging into iasWorld, selecting an active role, and changing your password. In many systems, you will not be required to login to iasWorld, but all new users may need to bookmark the iasWorld site, and select a role to use. As a new user, you should also review and update any personal details in your account, as necessary. For details about reviewing and updating your account, please see Customizing Your iasWorld Workspace.

Note: If you do login to iasWorld, you should immediately change your password. If you do not login to iasWorld, do not change your password, because if you do, you will also change your Windows login password.

Logging in to iasWorld

iasWorld includes sections that are available to the public. Because of this, there are extra, hidden security features to protect the data you use after you login. One of the security features used to protect iasWorld is called the hidden login. When this feature is enabled, you must enter a URL address in the browser address field before you can see the login page.

If your site includes the hidden login feature, you perform the same login procedure, but you must use the login URL provided by your administrator. When you are on the public iasWorld site, you will not see the login link. This section describes both login options: logging in with the standard login feature, and logging in with the hidden login feature.

To login to iasWorld with the standard login feature:

1. Open your browser window.
2. In the Address field (typically located on the top menu bar), enter the URL your system administrator has provided to you for access to iasWorld, and press Enter on your keyboard. The iasWorld public access page displays.
3. On the top black menu bar, click the Login link. The login page displays.

Note: Bookmark this page for future access to iasWorld.

4. In the Name field, enter your user name.
5. In the Password field, enter your password.
6. Click Login. Either the Start Page or your iasWorld Home page displays.

To login to iasWorld with the hidden login feature:

1. Open your browser window.
2. In the Address field (typically located on the top menu bar), enter the URL your system administrator has provided to you for access to iasWorld, and press Enter on your keyboard. The iasWorld login page displays.

Note: Bookmark this page for future access to iasWorld.

3. In the Name field, enter your user name.
4. In the Password field, enter your password.
5. Click Login. Either the Start Page or your iasWorld Home page displays.

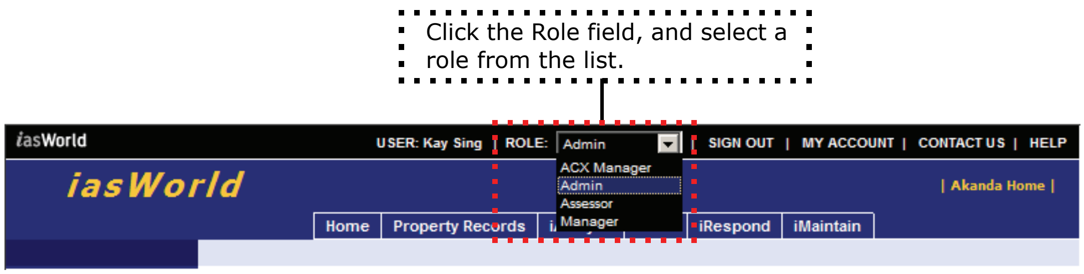
Choosing Your Active Role

You login to iasWorld to complete work using the secure property data and powerful features that iasWorld provides. One of the ways in which property data is kept secure is through roles. Each role is given access to only the data and features needed to do a particular job - for example, assessors can change assessment details, but cannot change a property's tax code, while the City Clerk can change a property's tax code, but cannot change assessment details.

If you have more than one role, you can use the Role pull-down menu on the top black menu bar to choose the role you are actively using. Because each role has different access, the active role determines what you can see and use in iasWorld. You can choose a default active role in your Account. For details, see Changing Your Account Details.

To choose an active role:

1. On the top black menu bar, click the Role field pull-down arrow, and from the list of roles that displays, select the role you want to make active:



When selected, the role name displays on the top menu bar, and any menu options or features enabled for the role are available in iasWorld.

Changing Your Password

If you enter login credentials when you access iasWorld, the first time you login, you use the password assigned to you by your administrator. You should immediately change this password. You will also be prompted to change your password again periodically when it expires. Your system administrator may have configured iasWorld to enforce strong passwords, in which case, when you create a password, you must ensure that it contains at least one upper-case character, one lower-case character, and one number.

Note: If you do not login to iasWorld, if you change your password in iasWorld, you will also change your Windows login password.

To change your password:

1. On the top black menu bar, click My Account. The Account options display on the left menu bar.
2. On the left menu bar, click Change Password. The Change your Password dialog box displays:

3. Click the New Password field, and enter your new password.
4. Click the Verify Password field, and enter your new password again.
5. Click Submit. Your password is saved, and you will be required to use it next time you login.

Note: You can also click Generate Strong Password to generate a random strong password. The password displays on a dialog box when it is generated. Write the password down before you close the dialog box.

2 Customizing Your iasWorld Workspace

After you login, you can make a number of changes iasWorld to create a workspace that supports the way you work. The choices you can make include which page you will use as your home page, which role you will use at login, and what information will display on your Dashboard. You can also update your account information, such as your name and email address, and change your password.

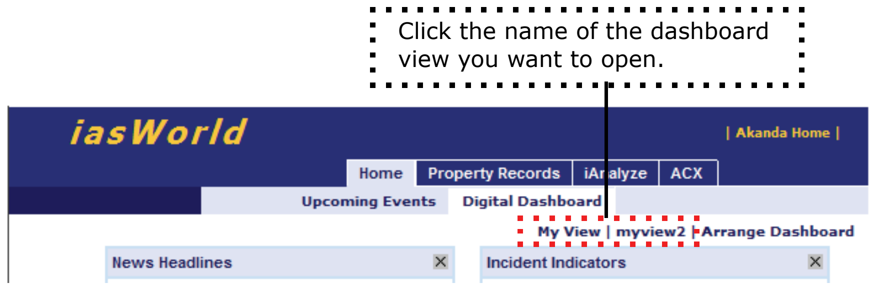
You will find the following information about customizing your workspace in this section:

- **Creating and Using Dashboard Views**: To support different phases of your work, or allow you to quickly and easily access different pre-defined groups of dashboard items, you can create two personal dashboard views. Each view can include any of the options your administrator has enabled. For details, see Creating and Using Dashboard Views.
- **Choosing Items for a Dashboard View**: Depending on the items that your administrator has enabled for you, you may see company news items, a quick search option that links directly to the property search feature, and a selection of activity history lists (which will take you back to any item you were using) on your active Digital Dashboard View. You can hide or display any of these items on either of your personal views, to create your own, personalized Digital Dashboard. For details, see Choosing Items for a Dashboard View.
- **Changing your Account Details**: Your iasWorld account includes your personal details, such as your name and email address, that are used to identify the items you create in iasWorld. In some cases, these details are also used to identify you to the public. You can review these account details and update them as necessary. If you are using more than one role in iasWorld, your account will also indicate which of your roles is active by default. You can change this default role selection as necessary. For details, see Changing Your Account Details.

Creating and Using Dashboard Views

The digital dashboard items provide very different types of information, depending on what you are using in iasWorld. For example, you may see Activity Center tasks assigned to you, or a list of urgent Incidents from the iRespond module. Rather than select all items for one standard dashboard, you can create two different views, and select different items for each.

After creating these different views, you can continue to add or remove items to suit your needs, and quickly and easily switch between them when logged into iasWorld.

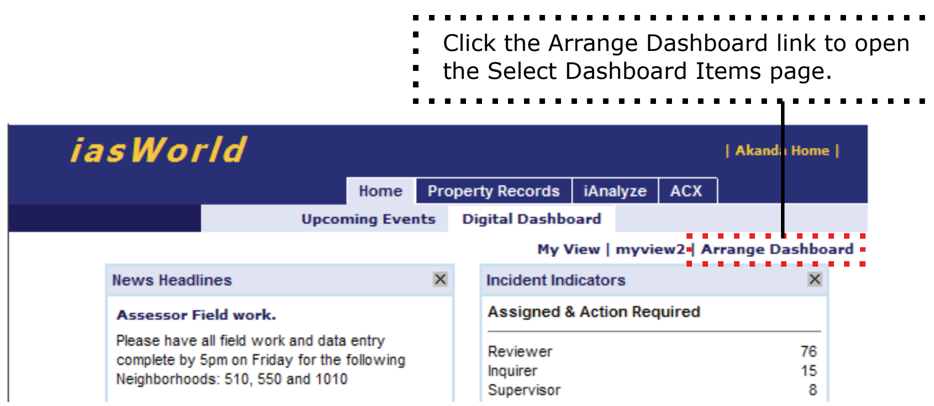


For details about adding and removing items on a dashboard view, see the next section, Choosing Items for a Dashboard View.

Note: Once you have two views, you can only create a new view by deleting an existing view. To delete a view, select it and click Delete.

To create a dashboard view:

1. From the top menu bar, select Home. The Home menu options display as second-level options on the top menu bar.
2. From the second-level options on the top menu bar, select Digital Dashboard. Your digital dashboard displays all of the items your administrator has enabled for you.
3. At the top right of the page, click the Arrange Dashboard link. The Select Dashboard Items page displays.



4. Click New. The New View dialog box displays.

5. In the Name field, enter a name for the new view.

6. Click . The new view name displays in the Select View drop-down list, and on the top right of the Dashboard page.

7. Click . The Dashboard page displays, with the new View link at the top right of the page.

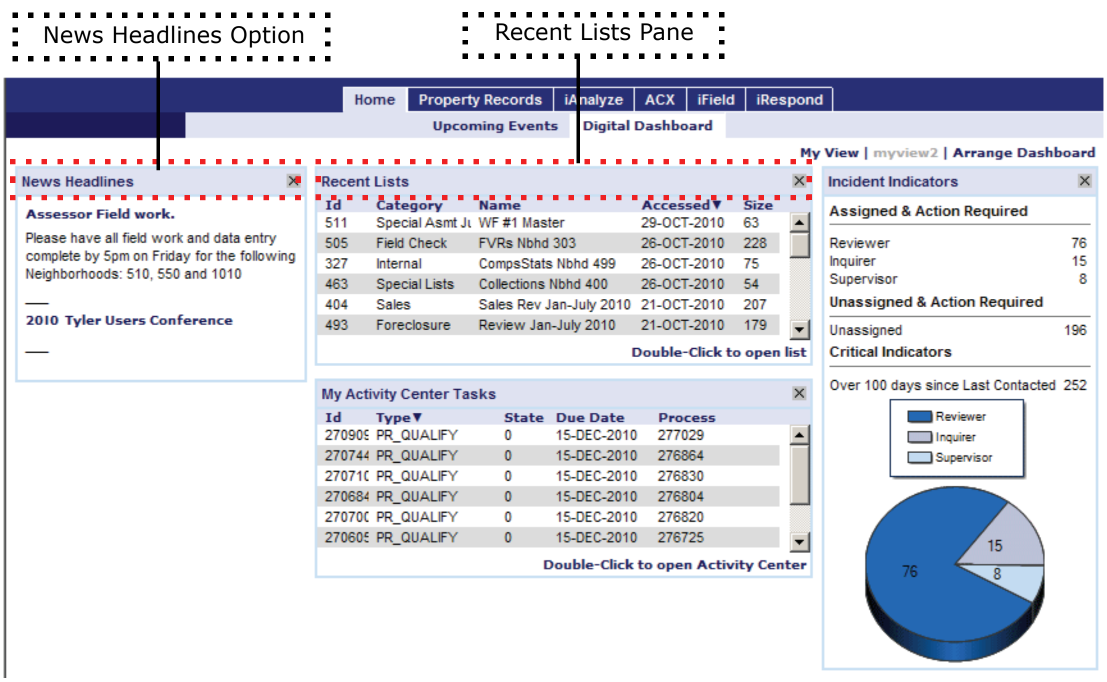
Choosing Items for a Dashboard View

Dashboard Views provide information to simplify your work in iasWorld, such as a list of the lists you have recently used, or a list of items in one of the iTools that require your attention. You can personalize your dashboard Views by selecting any of the items that your administrator has provided. Note, your administrator may restrict the items you can hide on your dashboard. For example, you may be unable to hide the Organizational News item if your administrator feels it is important that you review organizational news each time you open your dashboard.

You may find any of the following on your digital dashboard:

- **Recent Lists**: A track of the lists you have been using. Click any list to display it again on the Lists page.
- **Organizational News**: News items that your organization posts, as needed, to advise you of general events, or updates related to iasWorld, such as new tax year data availability.
- **Module-Specific Items**: Depending on the modules you use, your administrator may have enabled extra items (for example, Activity Center users may see assigned Tasks).

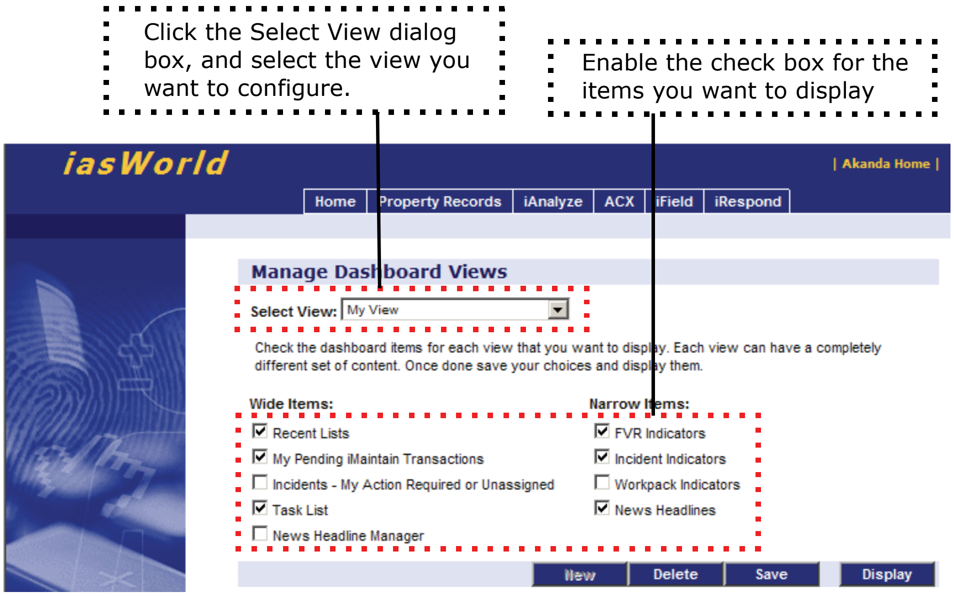
The following illustration shows the items described above:



To choose the items that display on your digital dashboard:

1. From the top menu bar, select Home. The Home menu options display as second-level options on the top menu bar.

2. From the second-level options on the top menu bar, select Digital Dashboard. Your digital dashboard displays all of the items your administrator has enabled for you.
3. At the top right of the page, click the Arrange Dashboard link. The Select Dashboard Items page displays.
4. For each listed item that you do want to include on your digital dashboard, enable the select box. When enabled, a check mark displays



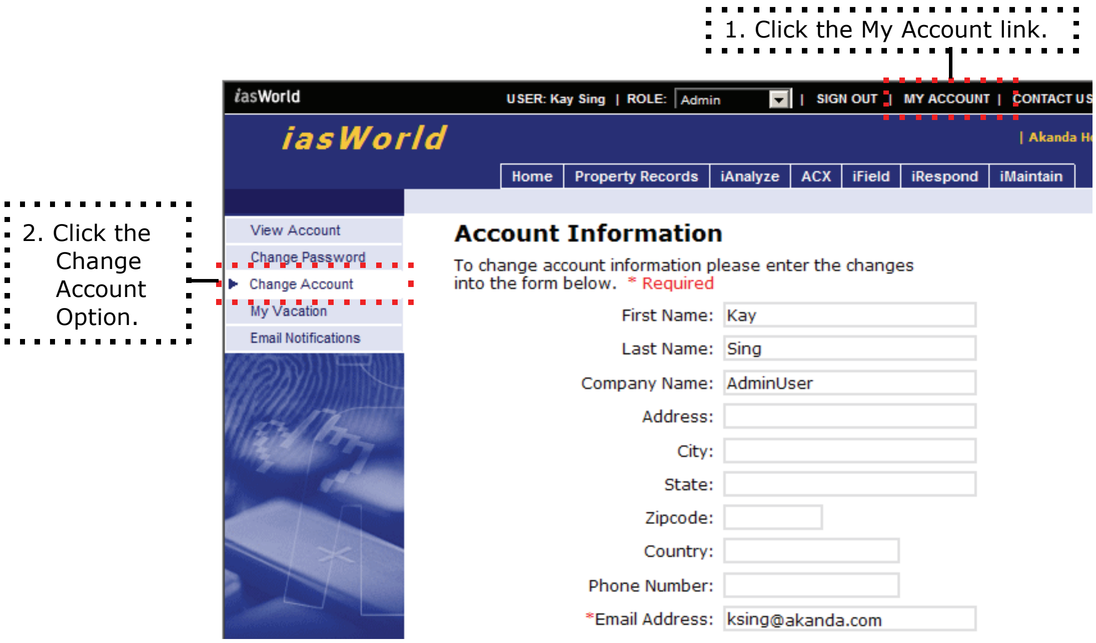
5. Click Save. Any items you have enabled display, and any items you have disabled are hidden on your digital dashboard, which re-displays.

Changing Your Account Details

Your account details are used to identify the items you create in iasWorld, and to identify you as the owner of lists you have shared with other iasWorld users. You can review these account details with the View Account option, and make changes in the Change Account option. In addition, your account enables you to select the default active role you use in iasWorld. For details about your active account, and switching between roles, see Choosing Your Active Role.

To change your account details, or select a new default role:

1. On the top black menu bar, click the My Account link. The Account options display on the left menu bar.
2. On the left menu bar, click Change Account. Your current account details display.



3. Click any of the available fields, and enter new account details as necessary.
4. If required, in the Default Role section, click the radio button beside the role you wish to use as your default role. When selected, a black centre displays.
5. Click Submit. Your account changes are saved, and if applicable, the new default role is used to provide your iasWorld features and options.

Changing Your Default Role or the Default Jurisdiction Used for a Role

When you login to iasWorld, you are provided with access based on your default role and jurisdiction. In addition, each role available to you in iasWorld has a default jurisdiction, which is used to select data unless you select another jurisdiction. If you find that you usually need to change the role you are using after logging in, or select a different jurisdiction for a role, you can change the default role or jurisdiction that are selected.

To change your default role or the default jurisdiction used for a role:

1. On the top black menu bar, click the My Account link. The Account options display on the left menu bar.

2. On the left menu bar, click Change Account. Your current account details display.

3. If required, in the Role/Jurisdiction table at the bottom of the page, change your default role with the following steps:

   a. In the Role field, select the role you want to use as your default role. When selected, the role is highlighted.

   b. At the bottom of the Role field, click Set Default. The selected role becomes your default role, and a letter ‘D’ displays at the left of the role name.

3\. If required, in the Role/Jurisdiction table at the bottom of the page, change the default jurisdiction for a role with the following steps:

   a. In the Role field, select the role for which you want to change the default jurisdiction. When selected, the role is highlighted.

   b. In the Jur field, select the jurisdiction you want to use as the default jurisdiction for the selected role. When selected, the jurisdiction was highlighted.

   c. At the bottom of the Jur field, click Set Default. The selected jurisdiction becomes the default for the selected role, and a letter ‘D’ displays at the left of the jurisdiction name.

4\. Click Save. Your account changes are saved, and if applicable, the new default role is used to provide your iasWorld features and options.

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3 Text Search for Property Records

There are two main methods for locating property records in iasWorld: by some attribute (such as parcel ID), with the text search options, or by physical location with the map search option. Both methods give you additional access to key details about the property records you choose for review, and the option to select individual property records and save your selections in lists, print details about them, or create reports about them.

In addition, after locating a property record of particular interest, you can use a buffer search to locate parcels within a specified distance of it, or use a neighborhood search to locate parcels that have sold in a pre-determined time period in the same neighborhood - usually the past 18 months from the current date.

You may also have access to the iDoc option, which enables you to add or download documents associated with a parcel, such as tax appeal records.

There are five default text search options: real property, owner name, address, parcel ID and advanced. The fifth category, advanced, includes comprehensive selection criteria, including items such as year built and square feet, that you can combine to locate property records. The text search options may also include a number of more specialized search options to support the type of work you do, such as a personal property or BLQ search.

In organizations where data is divided into multiple jurisdictions, there may be legal requirements that determine which groups of users have access to data in different jurisdictions. You may notice gaps in the data you retrieve due to jurisdiction restrictions.

For details about using features described in this introduction, see:

About the Text Search Options

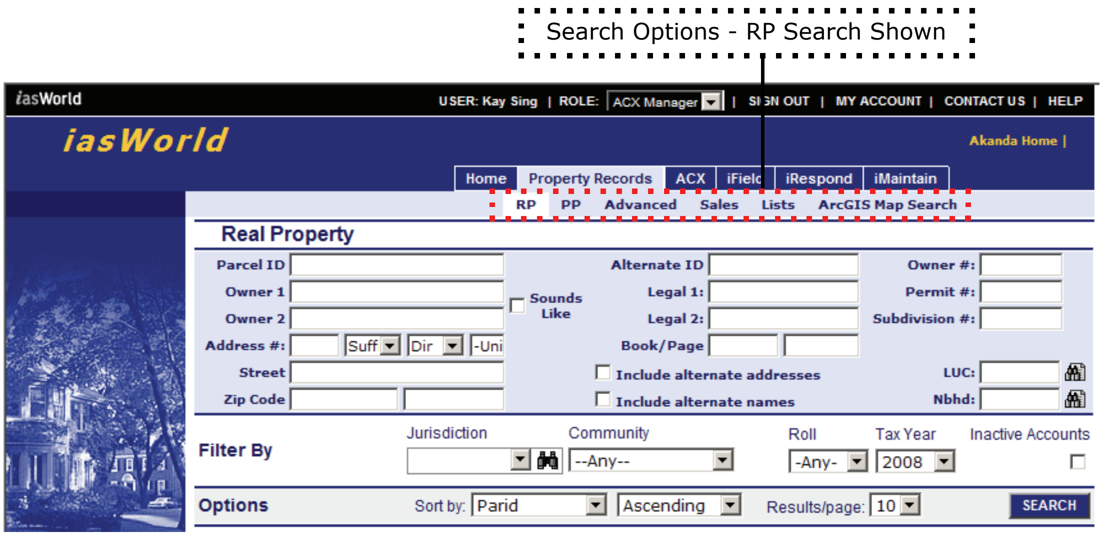
Locating Property Records with Text Search Options

Reviewing Property Record Details

Printing Property Record Details

About the Text Search Options

The Property Records feature enables you to select property records by attributes stored in the iasWorld database. The Real Property search option - which is the default search option in iasWorld - provides a combination of the key items you may need to use to locate property records, including Parcel ID, legal details, and permit number. iasWorld also includes three search options that enable you to locate a property record using a key attribute: property ID, owner name, and address. Depending on the search options enabled by your administrator, you may have access to these options.



The advanced search option provides more specialized attributes, such as sale code, land use code, and permit date, which you can combine to locate property records. The personal property search provides personal property details, such as registration number, that you can use to locate personal property. The sales search option enables you to locate sales records, rather than property records (although the property record details are also retrieved). Sales records are also used for the neighborhood sales option, which enables you to search using a neighborhood code. The buffer search option enables you to use the power of iasWorld's GIS functionality to locate property records by physical proximity.

You can add criteria that a property record must include using filters. Filters can make a search much more specific - for example, rather than searching for property records in five separate years, if you know the year in which you are interested, you can use the Tax Year filter to limit your search results to property records in that year. There are five default filters in iasWorld: Jurisdiction, City, Roll, Tax Year, and Inactive Accounts. The filters that are available can vary by search, depending on what your administrator has provided, and also depending on the details in property records used by your organization.

Once you have located a group of property records, there are a number of ways you can use them:

- **View Property Record Details**: You can view details about a property record without saving your search results. The details pages include a comprehensive selection of data items, in categories created by your organization to support your work. You can switch back and forth between the details pages and your search results list to select records, and move from property record to property record in your search results list on any details page.
- **View or Manage Uploaded Documents or Photos (iDoc)**: Depending on the access permissions provided by your iasWorld administrator, you can download copies of documents or photos that have been uploaded and attached to property records, upload additional documents or photos, and copy, move, or delete existing documents or photos.
- **Print Property Record Details**: After selecting a property record to view on any of the details pages, you can print details. The print option creates a printer-friendly version of either the active page or the entire property record, and displays it in a new dialog box, from where you can print or save it, as required.
- **Create a Report**: You may have access to custom reports, created for identified data needs in your organization. Custom reports are available on any of the details pages, listed in a Reports selection box. These reports can be saved or printed.
- **Create a List**: You can select individual property records in the search results table, and save your selections as a list. Lists store property records ID’s; the ID’s are used to retrieve the most current data about the property records in the iasWorld database each time the list is opened.

For details, select one of the following topics:

Locating Property Records with Text Search Options

Reviewing Property Record Details

Using iDoc

Using Reports

Printing Property Record Details

Locating Property Records with Text Search Options

There are five default text search options for locating property records in the iasWorld Property Records feature:

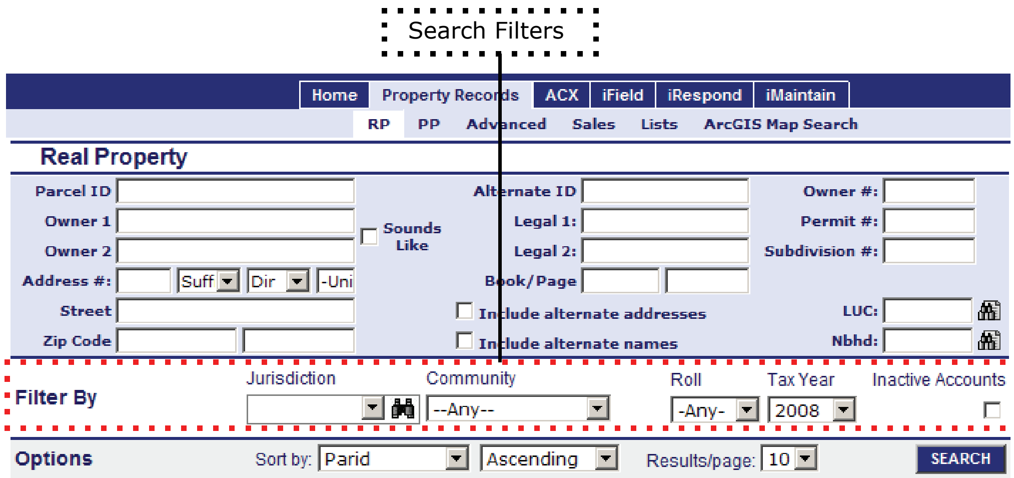
- **Real Property**: Search with a combination of key criteria, such as Parcel ID, owner name, neighborhood, and legal description. For details, see Using the Real Property Search.
- **Owner Name**: Search by first or last name, or part of either. For details, see Using the Owner Name Search.
- **Address**: Search by street name, number, or part of either, or use a predefined street type or direction. For details, seeUsing the Address Search.
- **Property Account**: Search by property account number, or a partial property account number. For details, see Using the Account Search.
- **Advanced**: Select a property data criteria (such as year built), then enter selection conditions (i.e., year built = 1980-2000). For details, see Using the Advanced Criteria Search.
- In addition, you may have access to the following options:
- **Parcel ID**: Search by parcel number, or a partial parcel number (such as the roll prefix). For details, see Using the Parcel ID Search.
- **Personal Property**: Search by personal property attributes, such as registration number or legal description. For details, see Using the Personal Property Search.
- **Sales Record**: Search by key sales details, such as sales date, sales value, or property criteria such as square feet, neighborhood and year built. For details, see Using the Sales Record Search.
- **Buffer Distance**: Search by proximity to the outside edges (parameters) of a selected parcel or parcels. For details, see Using the Buffer Search.
- **Neighborhood Sales**: Search by location in the same neighborhood as a selected parcel. Only parcels with a sales record in the neighborhood in a pre-determined time period (typically the last 18 months from the current date) are selected. For details, see Using the Neighborhood Search.
- **Advanced Query**: Search the iasWorld database using SQL queries. The Advanced Query interface lists the tables and views, and the individual fields available in each table and view, to assist you compile your query. Results display in a custom table at the bottom of the Advanced Query page. For details, see Using the Advanced Query Search.

The iasWorld administrator may make a Sounds Like search option available with searches that include a name field. The Sounds Like search option enables you to enter a name (last name, first name, and if applicable, middle name(s)) that sounds like the name you want to locate - which is helpful when you don't know the exact spelling of a name. For complete details, see Using the Sounds Like Search Option.

Before completing a search with criteria you enter, you can add a specific restriction about what you want to locate with a search filter. For example, if you only want to view property records with the roll type ‘Personal Property’ in your search results, you can use the Roll filter to make this restriction. There are five default filters available in iasWorld: Jurisdiction, City, Roll, Tax Year and Inactive Accounts. However, these filters can be enabled or disabled for each search type by your administrator, depending on the details available in your organizational data and the requirements of your work.

Using Search Filters

You can add search filter restrictions to the details you enter in any of the search options. Each property record is checked against your filter selections, and only property records that include the value or values you select for the filter(s) are provided in your search results.



Note: This section includes details of the default search filters available in iasWorld. These filters may or may not be available, depending on your organization.

This section includes the following topics:

Jurisdiction Filter

City Filter

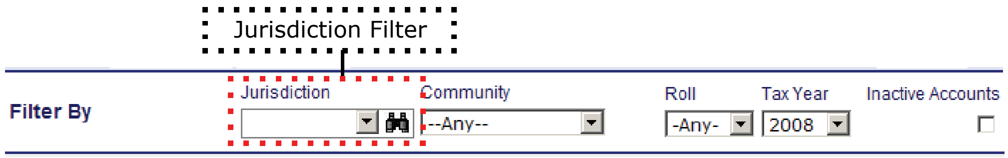
Roll Filter

Tax Year Filter

Inactive Filter

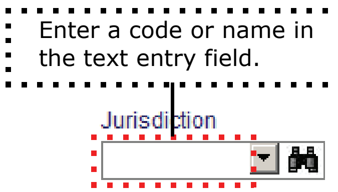
Jurisdiction Filter

The jurisdiction filter enables you to select one or several jurisdictions of interest. Your administrator can optionally provide a basic jurisdiction filter, or an advanced jurisdiction filter.

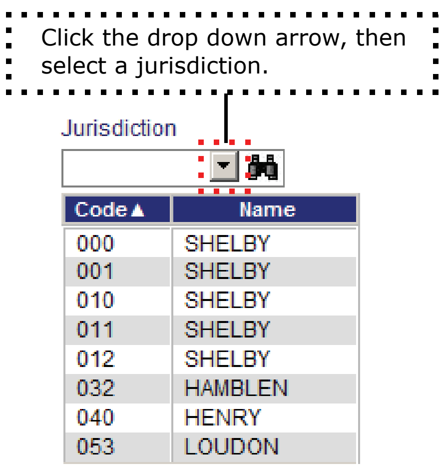


The options available with the jurisdiction are as follows:

- **Text Entry Option**: The text entry option enables you to enter any combination of jurisdiction code(s) or name(s) to filter your search results. To use the text entry option, click in the field and type the values you want to use.

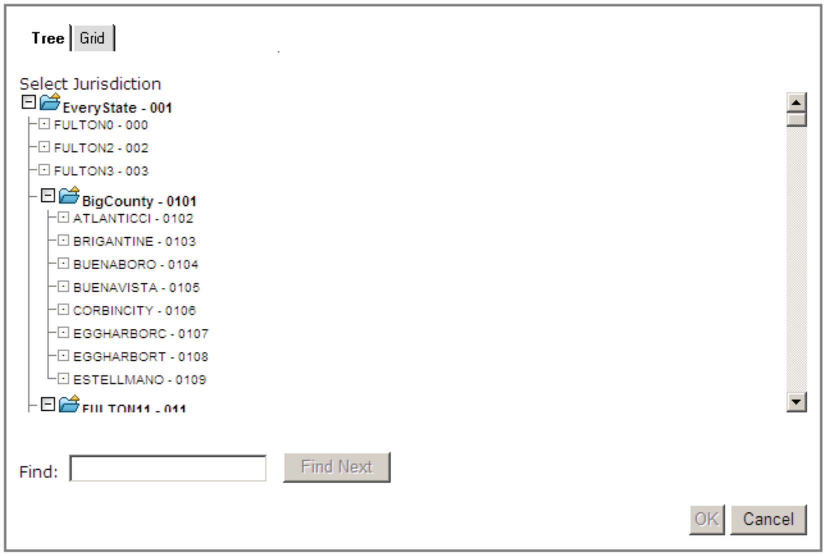


- **Pull-down List**: The pull-down list enables you to locate and select a jurisdiction using a table listing. The table may provide jurisdiction codes, names, or both code and name, depending on the selections made by your administrator. To use the table listing option, click the arrow at the right of the field.



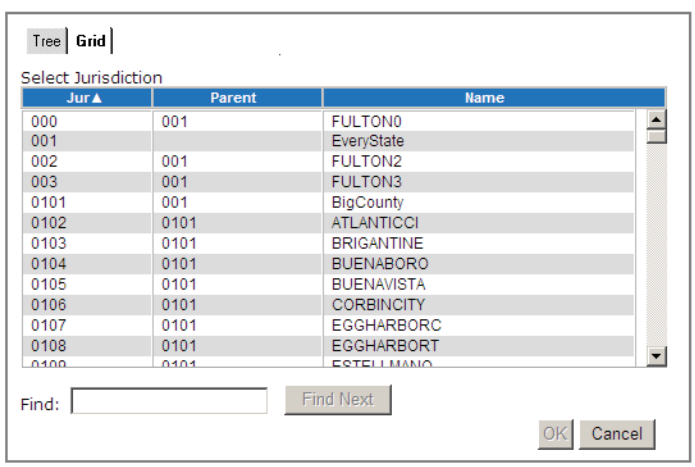
- **Advanced Selection - Tree**: The tree option provides a listing of jurisdictions organized into parent/child hierarchies. Each node provides the code and name of the jurisdiction. If a node includes an expand icon (+) at the right, it contains child-jurisdiction nodes that can be individually selected. When you select a parent jurisdiction, all descendent jurisdictions are also selected. You can click any node to select a jurisdiction. You can click any selected node to de-select it.

To use the tree option, click the binoculars button at the right of the field :



- **Advanced Selection - Table**: The table option provides a listing of jurisdictions in a table. Jurisdictions in the table can be sorted by column headers, or selected with the standard Windows keyboard options:
    - **Shift Key**: Hold down the Shift key and click a start row and end row (either above or below each other), and select both rows, and all rows in between.
    - **Control Key**: Hold down the Control key and click each row you want to select.

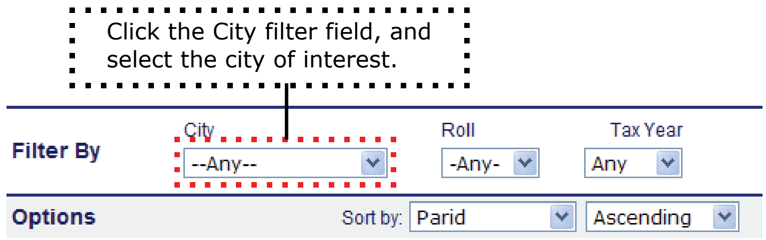
To use the grid option, click the binoculars button at the right of the field , then click the **Grid** tab:



- **Advanced Selection - Search**: The advanced search dialog box includes a search field, which you can use to locate a jurisdiction code or part of a code, or a jurisdiction name or part of a name. You can also click Find Next to find the next instance of the search item.

City Filter

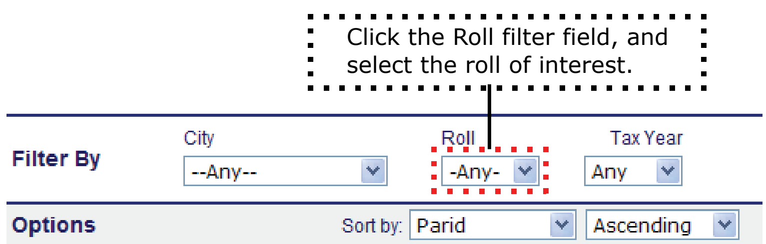
The city filter enables you to select a city of interest. This filter can also provide any type of sub-jurisdictional entity, such as communities, sub-divisions, or school districts. To use the City filter, click the field, or click the arrow at the right of the field.



Note: The City filter may be linked to the Jurisdiction filter. When it is linked, the cities listed (or other sub-jurisdiction entities being used, such as school districts) are all linked to a jurisdiction, and when a jurisdiction is selected in the Jurisdiction filter, only the applicable cities display in the City filter.

Roll Filter

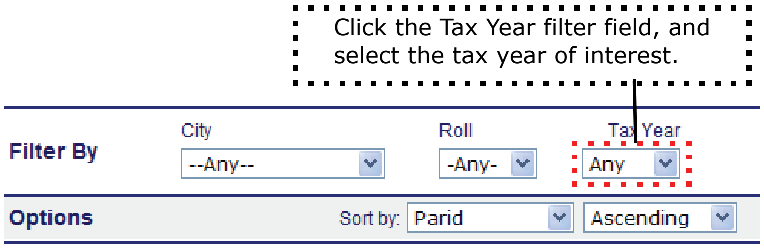
The Roll filter enables you to select a property records with a particular roll type. This filter may provide roll groups rather than the individual roll types used by your organization. For example, if your county uses ‘Fixed Vehicles’ and ‘Mobile Vehicles’ to sub-divide taxable personal property, the two may be combined in the Roll filter as ‘Personal Property’. To use the Roll filter, click the field, or click the arrow at the right of the field.



Note: Your administrator will be able to identify any roll groups in use in your organization.

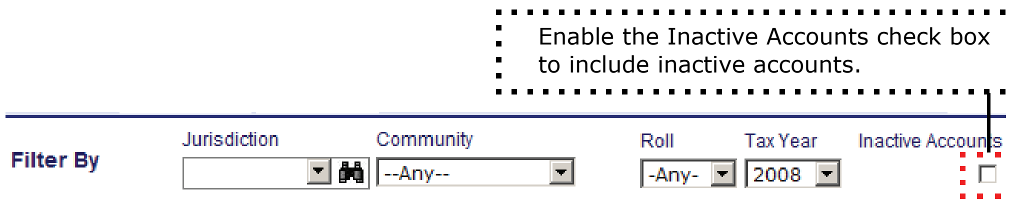
Tax Year Filter

The Tax Year filter enables you to select a property records in a particular tax year. The available years depend on the role you are using, and the selections of your administrator. To use the Tax Year filter, click the field, or click the arrow at the right of the field.



Inactive Filter

The Inactive filter enables you to include inactive accounts in your search results. To use the Inactive filter (to include inactive accounts in your search results), enable the check box.



Using the Sounds Like Search Option

The iasWorld administrator may make a Sounds Like search option available with searches that include a name field. There are several different types of name field that may be available, such as owner name, payer name, lien holder name, or lessee name.

When you use the soundex search option, you must create an entry that ‘sounds like’ the entire name you need to locate. For example, if you are trying to find a name that sounds like John Neurath, enter ‘newrath, jon’, or ‘nurat, john’. If you enter ‘neurath’ ‘newrath’ or ‘nurat’, your search results will include complete names that sound like Neurath, such as ‘Newer, Beth’, or ‘New, Robert’.

To use the Sounds Like option on any search field, enable the Sounds Like check box, then enter an approximation of the full name (surname, first name, middle name(s)) that you want to locate:

Using the Real Property Search

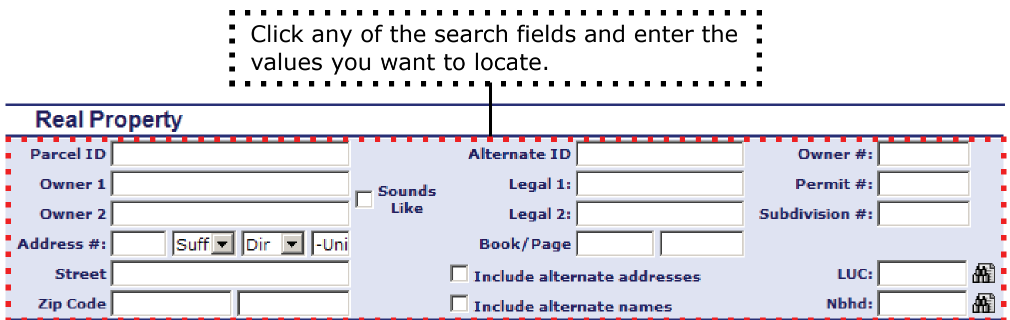
You can use a selection of key property record attributes - such as Parcel ID, owner name, permit number, legal description, or land use code - to locate records using this search option. You can also combine attributes to create a more specific search - for example, use a street name in combination with a sale date range to find all properties on a street that were sold in a one-year period of interest.

In some organizations, the parcel ID is split into several separate fields, representing the components of the parcel ID used. In these organizations, you can use each available parcel ID field to search for property records. However, if you are able to search several jurisdictions and they use different parcel ID formats, you must use the jurisdiction filter to select only one jurisdiction (and one parcel ID format) for each search.

Note: The case format of your entry - capital or lower case - is not recognized for this search. If you use all lower case, names with capitals that match the letters you enter are also returned.

To search using this option:

1. Click the Property Records tab. The search options display as second-level options on the top menu bar.
2. Click the Real Property (RP) menu item. The real property search page displays.



3. In any of the available fields, enter the value you want to search for, with the following options:
   - Use an asterisk * before or after the contents of any field to use partial details (i.e., enter Smi* to find all property records with owners whose names start with SMI).
   - Use a combination of attributes to create a more specific search.
   - If you are searching for a corporation, enter the corporation name in the same way it is registered (i.e., enter ‘1125 First Property Trust’ for a corporation legally registered as 1125 First Property Trust).

Note: For any of the text fields you can use multiple values. Enter one value, followed by comma, then enter a second value (and optionally, continue with a third comma and a third value, etc.) if you want to locate multiple values (i.e., enter BIRCH,GRAND,LONG* in the Street field to locate multiple streets). Note: Do not use spaces when entering multiple values.

4. If required, select a value in any available filters to narrow the search results. Only property records with the values selected in filters display in your search results.

5. Click SEARCH. Any property records that match your search criteria and filter selections display in the search results table.

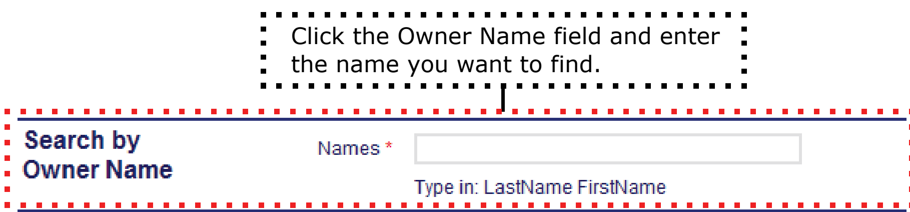
Using the Owner Name Search

You can use a complete name or a fragment of a name to locate records using this search option.

Note: The case format of your entry - capital or lower case - is not recognized for this search. If you use all lower case, names with capitals that match the letters you enter are also returned.

To search using this option:

1. Click the Property Records tab. The search options display as second-level options on the top menu bar.
2. Click the Owner menu item. The owner search fields display.



3. In the Name Field, enter the name you want to locate, surname first.
    - Enter one name, followed by comma, then enter a second name, (and optionally, continue with a third comma and a third name, etc.) if you want to locate multiple owner names. (i.e., enter SMITH,SMYTHE,SMIT*). Note: Do not use spaces when entering multiple names.
    - Use an asterisk * before or after the name to use partial details (i.e., enter Smi* to find all property records with owners whose names start with SMI).
    - Use a single space between each name (i.e. surname -space- middle name -space- first name: Jones John Paul)
    - If you are searching for a corporation, enter the corporation name in the same way it is registered (i.e., enter '1125 First Property Trust' for a corporation legally registered as 1125 First Property Trust).
4. If required, select a value in any available filters to narrow the search results. Only property records with the values selected in filters display in your search results.
5. Click SEARCH. Any property records that match your search criteria and filter selections display in the search results table.

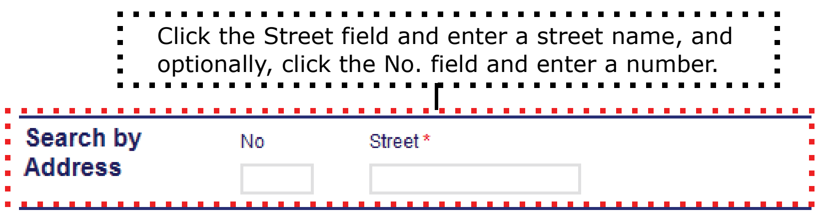
Using the Address Search

You can use a street number, name, type or even street compass direction to locate property records using this search option. You can also use a fragment of a street number or street name, combined with an asterisk, to locate records.

Note: The case format of your entry - upper or lower case - is not recognized for this search. If you use all lower case, names with capitals that match the letters you enter are also returned.

To search using this option:

1. Click the Property Records tab. The search options display as second-level options on the top menu bar.
2. Click the Address menu item. The address search fields display.



3. In any of the available fields, enter the value you want to search for, with the following options:
   - **Number:** Enter a street number. Use an asterisk * before or after the number to use partial details (i.e., enter 11* to find all property records whose street number starts with 11).
   - **Street:** Enter a street name. Use an asterisk * before or after the street name to use partial details (i.e., enter Sun* to find all property records on streets that start with SUN). Enter one value, followed by comma, then enter a second value (and optionally, continue with a third comma and a third value, etc.) if you want to locate multiple values (i.e., enter BIRCH, GRAND,LONG* in the Street field to locate multiple streets).
   - **Suffix:** From the list, choose a street type.
   - **Direction:** From the list, choose a street compass direction.

Note: For any of the text fields you can use multiple values. Enter one value, followed by comma, then enter a second value (and optionally, continue with a third comma and a third value, etc.) if you want to locate multiple values (i.e., enter BIRCH, GRAND,LONG* in the Street field to locate multiple streets). Note: Do not use spaces when entering multiple values.

4. If required, select a value in any available filters to narrow the search results. Only property records with the values selected in filters display in your search results.
5. Click SEARCH. Any property records that match your search criteria and filter selections display in the search results table.

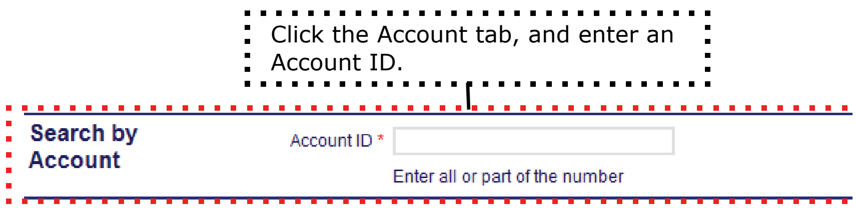
Using the Account Search

You can use a complete account number, or a fragment of an account number to locate records using this search option.

In some organizations, you will see several fields that can be used to search for the different parts of the account number. If your organization uses several fields, you should follow the steps below, but you can enter part of the account number in any of the available fields. If your organization uses different account number formats for different jurisdictions, you must use the jurisdiction filter to select only one jurisdiction (and one account format) for each search.

To search using this option:

1. Click the Property Records tab. The search options display as second-level options on the top menu bar.
2. Click the Account menu item. The account search field displays.



3. In the account field, enter an account number, or partial account number.
   - Use an asterisk * before or after the number to use partial details (i.e., enter 100200* to find all property records with account numbers that start with 100200).
4. If required, select a value in any available filters to narrow the search results. Only property records with the values selected in filters display in your search results.
5. Click SEARCH. Any property records that match your search criteria and filter selections display in the search results table.

Using the Advanced Criteria Search

You can use multiple, very specific criteria to locate records with this search option. The criteria available to search with depend on what has been selected for the site, and may change over time. Because of this, this help does not provide details of what each criteria represents. If you have any questions about any listed criteria, contact your administrator.

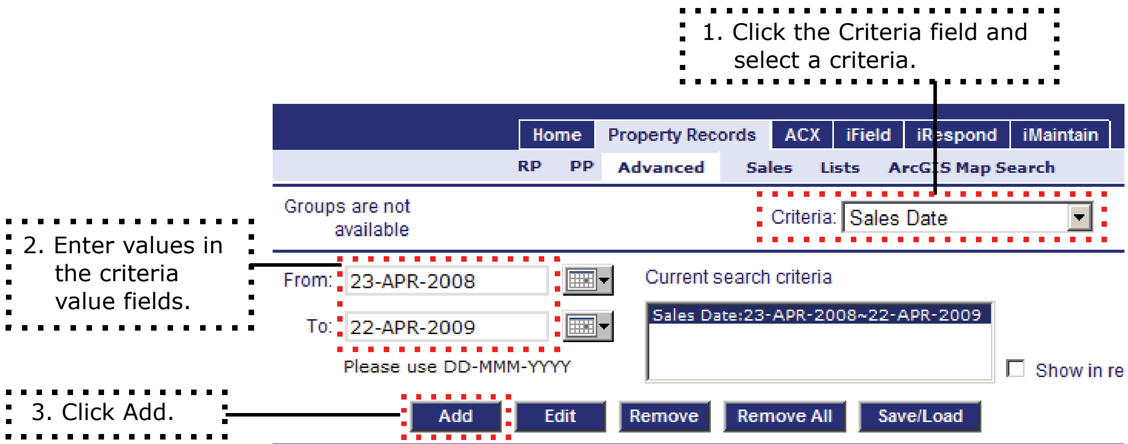
The standard search results criteria selected by your administrator may not include the attributes you use to search with. You can enable a check box, 'Show in results', to include the criteria you use to search in your search results listing. Each criteria will display as a column, and each listed property record will display a value (if there is one).

Depending on your organization, you may also have the option to save advanced criteria searches. If you do have this option, you can copy the saved advanced searches, re-use them as they stand, or re-use or re-save them after adjusting some attribute values.

Creating an Advanced Criteria Search

To create an advanced criteria search:

1. Click the Property Records tab. The search options display as second-level options on the top menu bar.
2. Click the Advanced tab. The advanced criteria search options display.



3. Click the Criteria pull-down list arrow, and select the criteria you want to use. The value field(s) for the selected criteria display.
4. Enter the values you want to use, and click Add. The criteria name and the values you entered display in the Current Search Criteria field.

Note: You can change the values you entered by clicking the criteria listed in the Current Search Criteria field and clicking Edit. After editing the values, re-add the criteria to your selected list before saving the criteria search.

Note: For any of the text fields you can use multiple values. Enter one value, followed by comma, then enter a second value (and optionally, continue with a third comma and a third value, etc.) if you want to locate multiple values (i.e., enter BIRCH, GRAND,LONG* in the Street field to locate multiple streets). Note: Do not use spaces when entering multiple values.

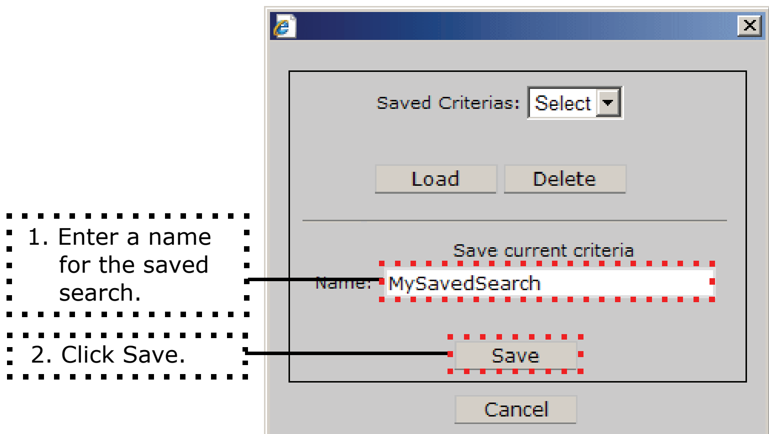
5. Select another criteria, enter values and add it to your selected list, as needed.
6. If required, enable the Show in results check box. When enabled, a check mark displays.
7. If required, select a value in any available filters to narrow the search results. Only property records with the values selected in filters display in your search results.

8. Click SEARCH. Any property records that match your search criteria and filter selections display in the search results table. If the Show in results check box was selected, search results also list the values for each criteria used.

Saving an Advanced Criteria Search

To save an advanced criteria search:

1. After adding the criteria values to the Current Search Criteria box as described in the section above, click Save/Load. The Save Criterias dialog box displays:



2. In the Save Current Criteria section, enter a name for your personal criteria search, and click Save The personal criteria search is saved.

Note: You must reload the advanced criteria search to use it.

Loading a Saved Advanced Criteria Search

To load a saved advanced criteria search:

1. Click the Property Records tab. The search options display as second-level options on the top menu bar.
2. Click the Advanced menu item. The advanced criteria search options display.
3. Click Save/Load. The Saved Criterias dialog box displays.
4. In the Saved Queries section, click the pull-down list arrow, and select the advanced criteria search you want to use.
5. Click Load. The stored criteria and associated values display in the Current Search Criteria field.
6. Click SEARCH to use your advanced criteria search to locate records.

Copying an Advanced Criteria Search

You can create multiple advanced criteria searches that have slightly different values, or a few different criteria, by copying an existing advanced criteria search. To use this method to create a new advanced criteria search, you select an existing advanced criteria search, make the criteria or criteria value changes you require, and then save the search with a new name.

To create a new personal criteria search from an existing advanced criteria search:

1. Load the advanced criteria search you want to copy.

Note: To edit the values of an existing criteria, in the Current Search Criteria section, click the criteria whose values you want to change, then click **Edit**. The existing criteria values display in the top Criteria List section. Edit the values as necessary, then click **Add** to save the new values.

2. To add a new criteria, select the criteria from the Criteria pull-down menu, enter the values you want to use, then click **Add**. The criteria is added to the Current Search Criteria section.
3. To delete an existing criteria, in the Current Search Criteria section, click the criteria you want to delete, then click Remove. The criteria is removed from the advanced criteria search.
4. Click **Save/Load**. The Saved Criterias dialog box displays.
5. In the Save Current Criteria section, enter a name for your new advanced criteria search, and click **Save**. The advanced criteria search is saved.

Note: You must use a different name for the new saved advanced criteria search. If you save it with the same name, it will overwrite the existing saved advanced criteria search.

Using the Parcel ID Search

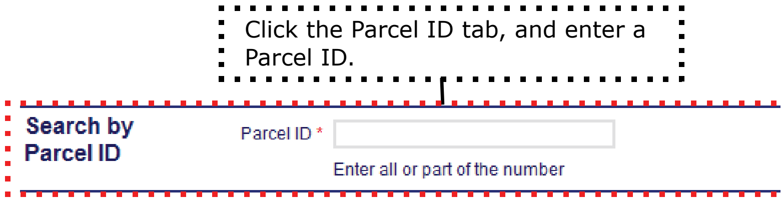
You can use a complete Parcel ID, or a fragment of a Parcel ID (such as the roll number prefix) to locate records using this search option.

Note: In some organizations, you will see several fields that can be used to search for the different parts of the parcel ID. If your organization uses several fields, you should follow the steps below, but you can enter part of the parcel ID in any of the available fields. However, if your organization includes several jurisdictions and each jurisdiction uses a different parcel ID format, you must use the jurisdiction filter to select only one jurisdiction (and one parcel ID format) for each search.

To search using this option:

1. Click the Property Records tab. The search options display as second-level options on the top menu bar.

2. Click the Parcel ID tab. The parcel ID search field displays.



3. In the Parcel ID field, enter a parcel ID number, or partial parcel ID number.

   • Use an asterisk * before or after the number to use partial details (i.e., enter 1002* to find all property records on roll 1002).

4. If required, select a value in any available filters to narrow the search results. Only property records with the values selected in filters display in your search results.

5. Click SEARCH. Any property records that match your search criteria and filter selections display in the search results table.

Using the Personal Property Search

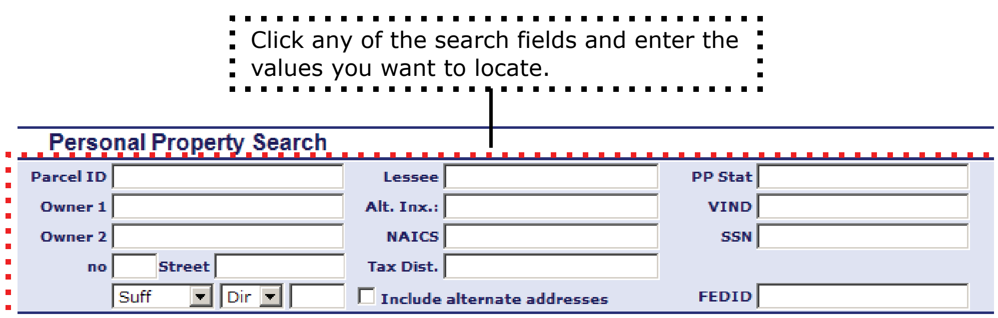
You can use a number of personal property identification details, such as legal description, lessee name, tag number, or owner name, or a fragment of information in one of the available categories to locate personal property using this search option.

In some organizations, the parcel ID is split into several separate fields, representing the components of the parcel ID used. In these organizations, you can use each available parcel ID-part field to search for property records. However, if your organization has several jurisdictions and each jurisdiction uses a different parcel ID format, you must use the jurisdiction filter to select only one jurisdiction (and one parcel ID format) for each search.

To search using this option:

1. Click the Property Records tab. The search options display as second-level options on the top menu bar.

2. Click the Personal Property (PP) tab. The personal property search fields display.



3. In any of the available fields, enter the value you want to search for, with the following options:
   - Use an asterisk * before or after the entered value to search for partial information (i.e., enter 1002* in the Tag Number field to find all personal property with a tag number that starts with 1002).
   - Enter values in multiple fields to create a more specific search.

Note: For any of the text fields you can use multiple values. Enter one value, followed by comma, then enter a second value (and optionally, continue with a third comma and a third value, etc.) if you want to locate multiple values (i.e., enter SMITH,SMIT,SMITS* in the Lessee name field to locate multiple lessee names). Note: Do not use spaces when entering multiple values.

4. If required, select a value in any available filters to narrow the search results. Only property records with the values selected in filters display in your search results.
5. Click SEARCH. Any property records that match your search criteria and filter selections display in the search results table.

Using the Sales Record Search

You can use a sales value range (for example, between $100,000 and $200,000) a sales date range (for example, between January 1, 2002 and January 31, 2002), or one of the property identification criteria such as square feet, stories, year built or neighborhood to locate property records using this option.

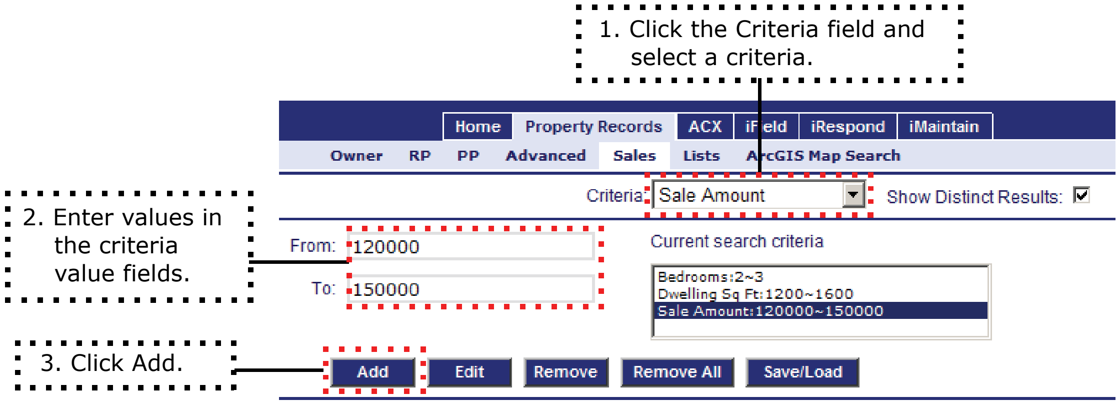
This search option provides a separate record for each sale located. If a property has been sold more than once, and each sale meets your selection criteria, you will see several separate records for the same property in the search results table.

Depending on your organization, you may also have the option to save sales criteria searches. If you do have this option, you can copy the saved sales searches, re-use them as they stand, or re-use or re-save them after adjusting some attribute values.

To search by sales record:

1. Click the Property Records tab. The search options display as second-level options on the top menu bar.

2. Click the Sales menu item. The Sales search options display.



3. From the Criteria pull-down menu, select the sales criteria you want to use as the basis of your search. The value field(s) for the selected criteria display.

4. Enter the values you want to use, and click Add. The criteria name and the values you entered display in the Current Search Criteria field.

Note: You can change the values you entered by clicking the criteria listed in the Current Search Criteria field and clicking Edit. After editing the values, re-add the criteria to your selected list before saving the criteria search.

Note: For any of the text fields you can use multiple values. Enter one value, followed by comma, then enter a second value (and optionally, continue with a third comma and a third value, etc.) if you want to locate multiple values (i.e., enter BIRCH, GRAND,LONG* in the Street field to locate multiple streets). Note: Do not use spaces when entering multiple values.

5. Select another criteria, enter values and add it to your selected list, as needed.

6. If required, select a value in any available filters to narrow the search results. Only property records with the values selected in filters display in your search results.

7. Click SEARCH. Any property records that match your search criteria and filter selections display in the search results table.

To save a sales criteria search:

1. Select the criteria and you want to save, and add them to the Current Search Criteria listing. When complete, the list of criteria values you want to save displays.

2. Click Save/Load. The Saved Criterias dialog box displays.

3. In the Save Current Criteria section, enter a name for your sales criteria search, and click Save The sales criteria search is saved.

Note: You must reload the sales criteria search to use it.

To load a saved sales criteria search:

1. Click the Property Records tab. The search options display as second-level options on the top menu bar.
2. Click the Sales menu item. The sales criteria search options display.
3. Click Save/Load. The Saved Criterias dialog box displays.
4. In the Saved Queries section, click the pull-down list arrow, and select the sales criteria search you want to load.
5. Click Load. The search values display in the Current Search Criteria field.
6. Click SEARCH to use your sales criteria search to locate records.

Using the Buffer Search

The buffer search option enables you to locate property records using their physical proximity to the boundaries of a selected property record or property records. You can create a buffer list from the results table, on any of the details pages, or on the Map display. Note, however, that your system administrator enables the buffer search option as required, so you may not necessarily find it in any of these locations.

Note: You must populate the results table using one of the other search methods, or select a parcel on the search map option before you can use the buffer search option.

To use the buffer search option:

1. In the results table, enable the select box beside any property record(s) you want to use as the basis of a buffer search. When selected, a check mark displays.
2. In the search results table, in any row, click the Buffer icon: . Note, this option only creates a buffer list of the property record in the selected row. The Buffer Search page displays.

- OR -

2. At the right of the any of the details pages, in the Search Manager, click ‘Buffer Search New List’. The Buffer Search page displays.

- OR -

2. Display a record on any of the details pages, then, at the right of the details page, click the Buffer icon: . The Buffer Search page displays.

- OR -

1. On the map display, select the property record(s) you want to use as the basis for a buffer search.

2. At the top of the map display, click the buffer selected icon: . The Buffer Search page displays.

- THEN -

3. In the Buffer field, enter the buffer distance from the selected property records you want to use to select additional property records.

4. As required, for the Include currently selected record(s) in list options, select Yes or No. When selected, the option radio button displays a dark centre.

5. Click . All property records within the buffer distance from your selected property record(s) display (either on the map display, or in the results table).

Using the Neighborhood Search

The neighborhood search option enables you to locate property records their neighborhood code. Only property records with a sales record in a pre-determined time period (typically the last 18 months from the current date) are selected. This feature is available in the search results list, on the details page and on the map display. Note, however, that your system administrator enables the neighborhood search option as required, so you may not necessarily find it in any of these locations. Because a neighborhood is quite large in some instances, this option is useful if you need to start with a broad search that you can subsequently refine.

Note: You must populate the results table using one of the other search methods, or select a parcel on the search map option before you can use the neighborhood search option.

To use the neighborhood search option:

1. In the results table, enable the select box beside any property record(s) you want to use as the basis of a neighborhood sales search. When selected, a check mark displays.

2. For any selected property record(s), click the neighborhood icon: . The Neighborhood Sales search results page displays details of the selected property record.

- OR -

1. At the right of any of the details pages, click the neighborhood icon: . The Neighborhood Sales search results page displays details of the selected property record.

- OR -

1. On the map display, select the property record(s) you want to use as the basis for a neighborhood sales search.

2. At the right of the map display, click the neighborhood icon:  . The Neighborhood Sales search page displays details of the selected property record.

- THEN -

3. If required, select a value in any available filters to narrow the search results. Only property records with the values selected in filters display in your search results.

4. Click . Any property records that match your search criteria and filter selections display in the search results table.

Using the Advanced Query Search

The advanced query search provides a special listing of property record details that are obtained with an SQL-syntax query to the available IAS database tables. The tables and views available to be queried and the fields in each table and view are listed on the search page so you can enter SQL queries for specific tables, views and fields.

Note: This search option requires knowledge of SQL query language. Your administrator may not have made it available to you.

To use the advanced query search:

1. Click the Property Records tab. The search options display as second-level options on the top menu bar.
2. Click the Advanced Query menu item. The Advanced Query options display.
3. Optionally, from the Tables pull-down menu, select the table you want to query, or select Views and select the view you want to query.

Note: Scroll through the list of associated fields to view the fields available in a table or view. Click any listed field to see comments about the field contents, if available.

4. In the query field, enter your SQL-syntax query.
5. At the bottom right of the Advanced Query page, click . The results of your query display in a table at the bottom of the Advanced Query page.

Reviewing Property Record Details

The property records selected by your search display in the results list table. This results list is stored while you are using the details pages to review property records: you can return to it at any time from any details page. It is also shared with the details pages: you can browse the records it contains from any details page, and the order in which records are available on the details page is identical to the order in which they are available in the search results list.

Property record search results may include documents or photos that have been attached to individual property records using the iDoc iTool. Details about using iDoc are found in the section Using iDoc.

This section includes the following topics about selecting and viewing property records:

Finding a Property Record in the Search Results List

Browsing Details About One Property Record

Sketch View Display Options

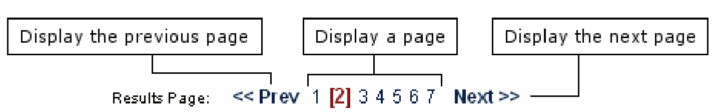
Map View Display Options

Browsing Through Records in a Category

Finding a Property Record in the Search Results List

Your search results are listed in the alpha-numeric order of the search option you used to get them. For example, if your search was by owner name, “Smith A” the results display Smith, Aaron before Smith, Alison. If your results include several records that have identical details (for example, if you searched by street number with 11, and several different property records on different streets with the same number were retrieved), then they are secondarily sorted by the owner name.

If your results table includes more than the maximum number of records allowed on a page (which is selected by your administrator), they are available on multiple pages. You can switch between pages with the navigation options at the bottom of the results table, as shown in the following illustration:



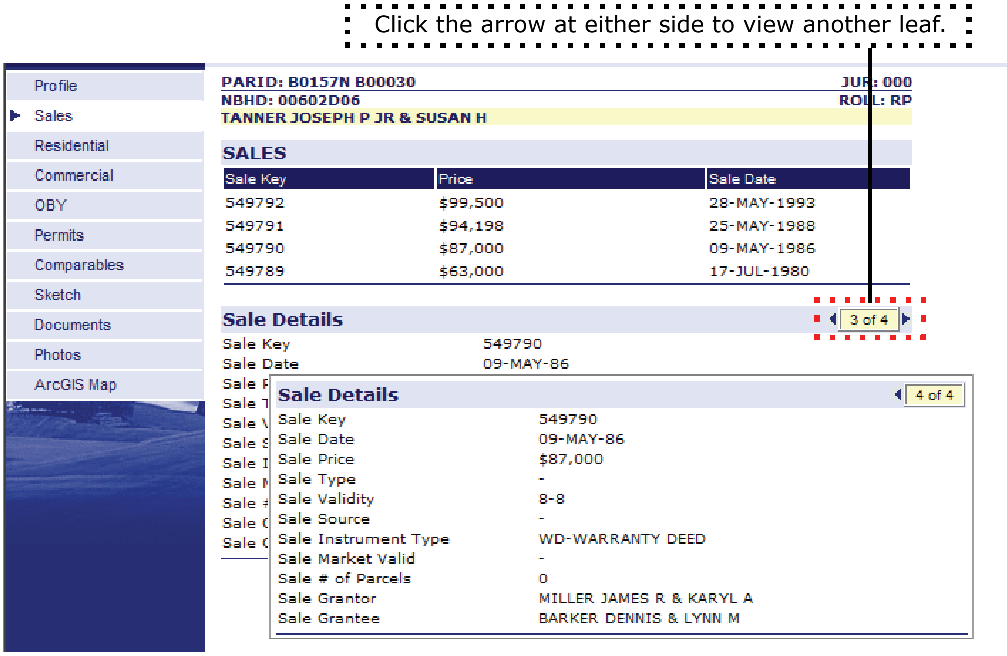
Once you have located the property record you want to review first, click its parcel ID number. The record details page opens and displays the first category of details available, which is the top item on the left-hand menu bar.

Browsing Details About One Property Record

The menu at the left of any of the details pages provides a complete listing of all pages of detail available about property records for the role you are using. If you have access to different roles, the options that display may be different for each role. To view the details on a page, click the menu option.

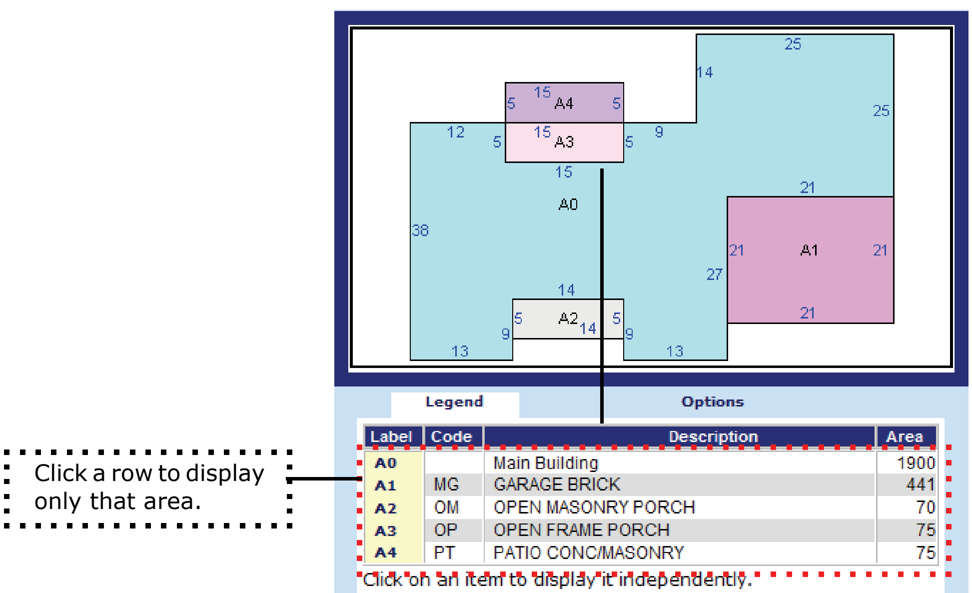
Click any of the menu items to view the associated details.

On some pages, certain sub-sections of data may have more than one record associated with them. For example, the sales history details may be stored in two or three records for different tax years. When there is more than one record associated with a sub-section of data, a small navigation box displays at the right of the sub-section header, as shown in the following illustration:



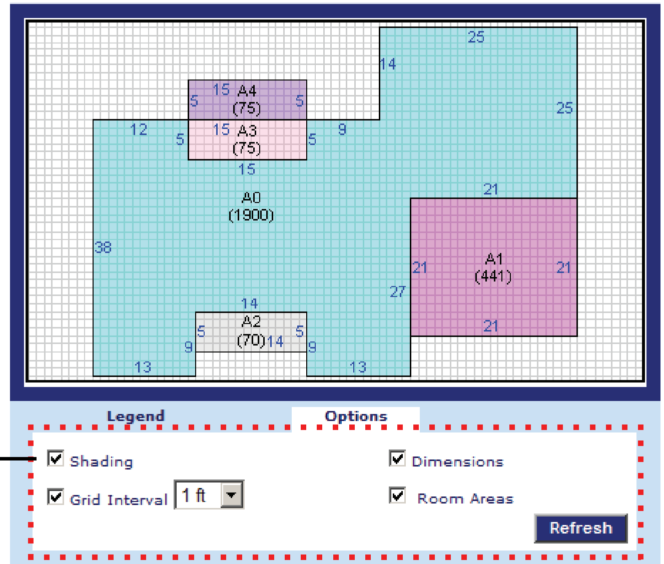
Sketch View Display Options

The sketch view provides a sketch of the main structure on the selected property record. Any sketch with multiple areas includes a table at the bottom, which you can use to display only one of the areas. To select one area, click the table row of the area:



If your administrator has enabled the Options panel, you can change the details provided on the sketch, including whether a grid displays, and whether the building areas are shaded or simply outlined. To select different display options, click the options tab and then disable or enable any display features you want to see:

Enable the display options you want to see.



Sketch display options are as follows:

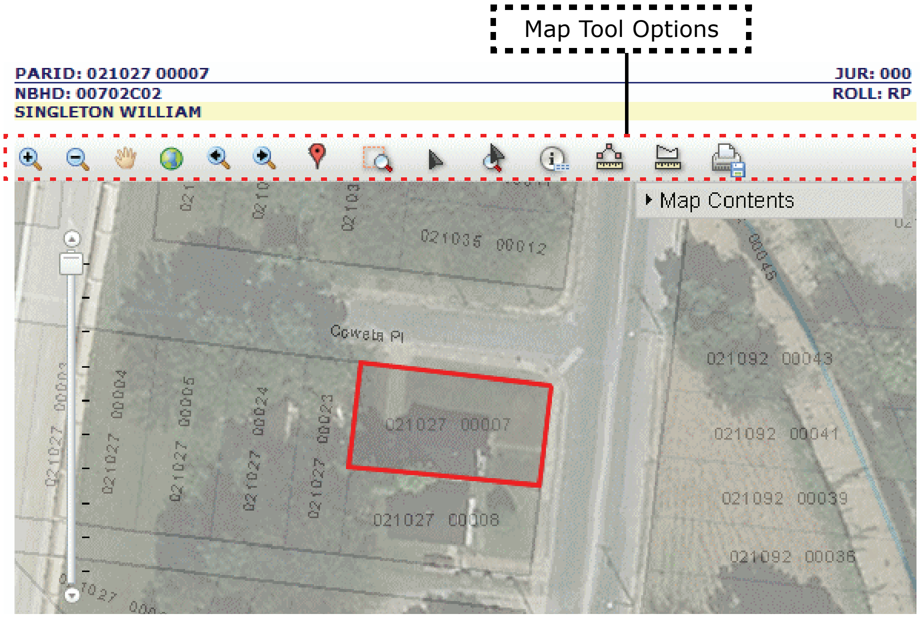
Sketch Display Options	
Option	**Details**
Shading	When enabled, each area is filled with a color (the color key is provided on the legend tab). You can only disable shading when borders is on.
Grid Interval	When enabled, a grid displays. Use the pull-down menu at the right of this option to select how far apart grid lines will be.
Borders	When enabled, each area is outlined. You can only disable borders when shading is on.
Dimensions	When enabled, each line segment measurement displays.

Note: The changes you make to the sketch display are discarded when you switch to another page (for example, Sales details).

Map View Display Options

The map view option provides an aerial map view of the selected parcel, with the parcel outline highlighted. The view provides multiple tools you can use to select, measure or print details about the property record associated with the parcel of interest. For complete details about using these options, see the rest of this section.

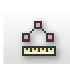
Map Tools



Note: You can hover your selection arrow on any button above the map to view the tooltip description of its function.

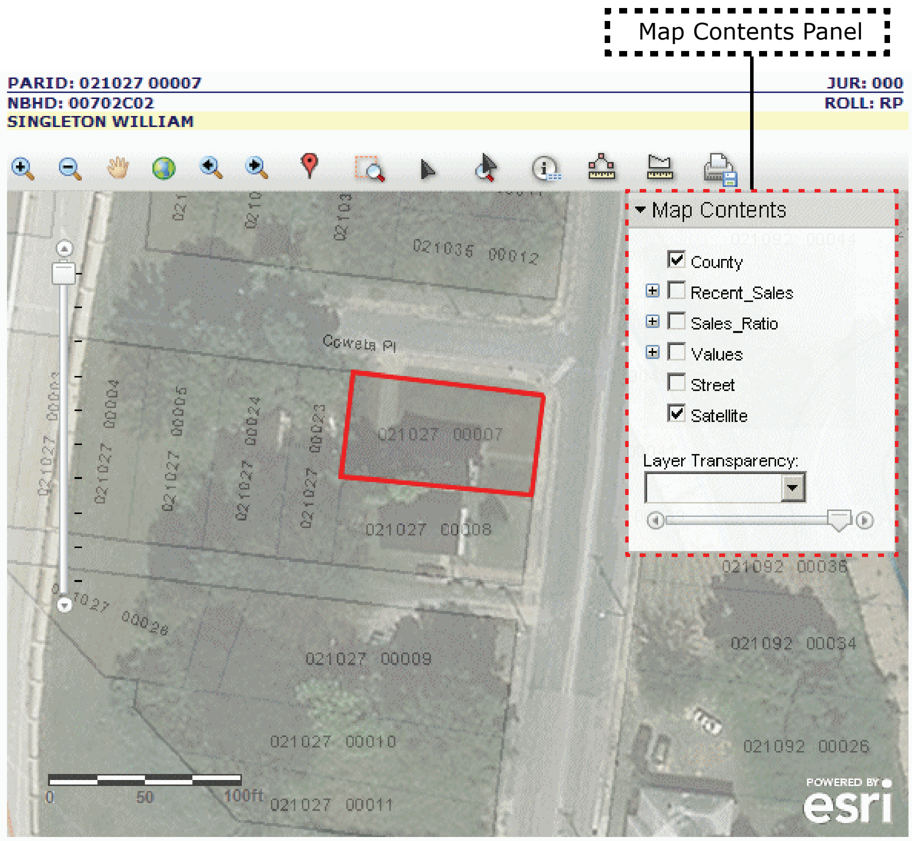
The Map tool options are as follows:

Map Tool Options	
Item	**Details**
	Zoom in - click to view a smaller area of the map in more detail. Zooms in using the center of the view as the focal point.
	Zoom out - click to view a larger area of the map in less detail. Zooms out using the center of the view as the focal point.
	Pan - click the button then click the display and drag away from the area you want to reveal.
	Previous - click to return the view to the previous location and zoom extent.
	Next - click to re-display the view settings that were in place before using the Previous button.
	Show point / Show outline - click to view the active parcel as a pointer on the map, or with a red outline.

	Zoom to selected - click to view the immediate area of the selected parcel in more detail.
	Select - click the button, then select one of the options from the drop-down menu that displays. Note, you can only select parcels associated with tasks. By free-form area:  - click this button, then click on the map and, holding down your mouse key, draw the area that contains the parcels you want to select. By rectangle area:  - click this button, then click on the map and, holding down your mouse key, drag the outline of the rectangle area that contains the parcels you want to select. By line:  - click this button, then click on the map at each point around the area that contains the parcels you want to select.
	Deselect - click the button, then select one of the options from the drop-down menu that displays. Note, you can only select parcels associated with tasks. By free-form area:  - click this button, then click on the map and, holding down your mouse key, draw the area that contains the parcels you want to deselect. By rectangle area:  - click this button, then click on the map and, holding down your mouse key, drag the outline of the rectangle area that contains the parcels you want to deselect. By line:  - click this button, then click on the map at each point around the area that contains the parcels you want to deselect.
	Measure length - click the button, then click the start point of the length you want to measure, and, holding down your mouse key, drag the line that displays to the end point of the length you want to measure. When you release your mouse key, the distance measure displays at the bottom of the map area.

	Measure area - click the button, then click the start point of the area you want to measure, and holding down your mouse key, draw the outline of the area you want to measure. When you release your mouse key, the perimeter and volume of the area display at the bottom of the map area.
	Print or save - click the button, then in the dialog box that displays, select the print or save options you want to use.

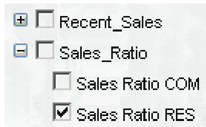
Map Contents Panel



Note: The specific contents and options in this Map Contents panel depend on your organization and role. Because of this, the details provided below are generic. For specific details about the options available to you, please contact your iasWorld administrator.

Options to use the Map Contents panel are as follows:

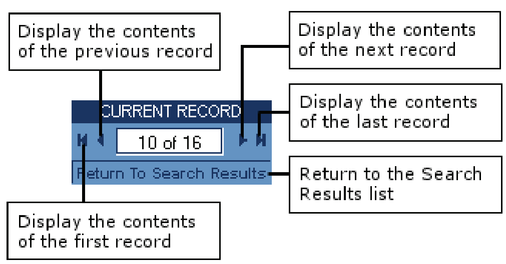
Map Contents Panel Options	
Item	**Details**

	Expand/Collapse Group - click the + or - sign at the left of the group to view the items it contains.
	Enable/Disable Option - click the check box to enable the item. When enabled, the information is added to the map display.
	Set Layer Transparency - Click the Layer Transparency field and select the item you want to make more or less transparent. When selected, the item name displays. After selecting the item, click the slider arrow to make it more or less visible on the map display. As you move the slider arrow, the transparency of the layer changes on the map.

Browsing Through Records in a Category

You can browse the details of records, in any one category, using the Current Records navigation box. You can navigate among the records in a number of ways, as shown on the illustration below.

Note: Hover your selection arrow on any of the navigation arrows to view the tooltip description of its function.



You can also use the Return to Search Results link at the bottom of the Current Records navigation box to return to your results list to select another record by name or any other detail.

Note: You can view the details or several records at the same time by creating a new browser instance of the record details page. With your search window open, press Control+N.

Printing Property Record Details

You can create and save a printable version of the property record details available on any of the details pages. Depending on the features enabled for your system, you may be able to print a summary report and a full details report. You can also save the print version of a report in a location of your choice.

You may also have access to reports, which you can both save and print. These reports are listed at the right of any of the details pages, in the Reports list pane. For details, see Using Reports.

To print a standard or summary report:

1. Using the search options available in the Property Records tab, locate the property record for which you want to print a standard or summary report.
2. On the search results list, click the property record for which you want to print a standard or summary report. The property record Profile details display on the Details page.
3. At the right of the Details page, click the Print Report link, or Print Summary link, as required. The Print Record page displays details of the selected record.
4. From the top menu on the Print Record page, select File|Print. The selected property record information is printed.

- OR -

5. If required, select File|Save As, and save the report in the location of your choice.

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4 Map Search for Property Records

The map search feature provides an aerial view of a geographic area. The map display is fully interactive. You can quickly and easily change the scale of your view, select and zoom in on areas, and select individual property records. When you select an individual property record, you will instantly be able to view summary details (such as owner name or sale value) about it in the data panel.

The map search feature includes the following:

- **Display Focus**: You can zoom in on a map area by drawing a selection area. You can then zoom in on a smaller area within the selected area, to the scale required. You can zoom out, in clicks, by percentages of the displayed view. The full map view button allows you to re-display the map at the highest available scale. The pan option turns the pointer into a map drag tool, which you can use to drag the map in any direction, so you can view hidden parts of the map.
- **Map Contents**: The Map Contents panel provides layers, which provide additional information details overlays such as property ID's, water bodies, or sub-division lines. Some layers only become available when the display is at a low resolution - for example, street names only display when streets are large enough for the street name text to be visible. The layers available depend on your organization, and what the iasWorld administrator has provided.
- **Property Record Selection**: The map display includes multiple tools that enable you to select or deselect property records by clicking or drawing shapes directly on the map. The Buffer select tool enables you to select property records by their distance from the edges of the property record(s) you have already selected. You can save selected parcels to a list.
- **Data Panel Property Record Details**: Depending on what your administrator has configured, the data panel can supply additional details about selected property records such as last sale price or a tax history.

Buffer List Option: The map buffer list feature enables you to create a list by proximity to the edges of the property record(s) you have already selected. For complete details about creating a list using the buffer list option, see Using Lists.

This section includes the following topics:

Locating and Selecting Property Records on the Map Display

Using Map Layers

Locating and Selecting Property Records on the Map Display

When the Map Search page first opens, the map that displays is at the highest level available. Map display options that you can use to locate a property record include:

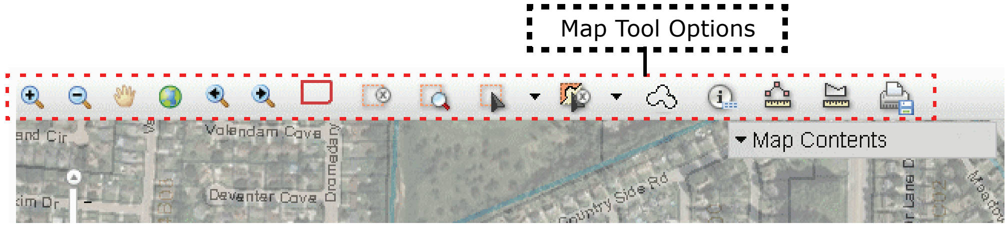
- **Zoom Options**: There are several options available on the map display that you can use to zoom in or zoom out:
    - The **Zoom Buttons** in the map navigation panel enable you to zoom in or out on the center of the map.
    - The **Zoom In** tool enables you to draw the area you want to zoom in on. After the area is drawn, the map re-displays only the selected area.
    - The **Zoom to Selected** tool enables you to zoom in to any selected property record(s). If you have selected several property records, the area that displays is scaled to display all selected property records.
    - If you are using a mouse with a wheel, the wheel will zoom in or out, at the scale set for your computer mouse configuration.
    - The **Zoom Out** tool enables you to click on the map display and zoom out by a predetermined percentage (for example, 50%) from the center of the map.
- **Map Navigation**: The pan options in the map navigation panel enable you to pan the map north, south, east or west. The pan tool converts the pointer into a drag-and-move tool, which you can use to drag the contents of the main map to reveal sections that are currently hidden.
- **Display Details**: The Map Contents panel provides layers options, which enable you to add additional details to the map display, such as sub-division lines and parcel ID numbers. The layers that are available depend on your organization and the choices of your administrator. For details about changing layer information, see the section below, Using Map Layers.
- **Selection/Deselection Tools**: The selection tools enable you draw areas, shapes or lines on the map display to select property records. The deselection tools enable you to draw areas, shapes or lines on the map display to deselect property records.
- **Buffer Selection Tool**: You can use the buffer tool to select parcels by their proximity to already selected parcels. The buffer area tool enables you to click on a point on the map display and select all parcels in the visual buffer area you create.

In organizations where data is divided into multiple jurisdictions, there may be areas on the map display that contain data that you do not have permission to use. If you do not have access to data in a jurisdiction, you will see the parcel outlines on the map, but will be unable to select them.

To use the Map Search tools, perform the following procedure:

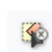
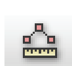
1. On the iasWorld top menu bar, click the Property Records tab. The search menu options display as second-level choices on the top menu bar.
2. Click the Map Search menu item. The Search Map tools display at the top of the map panel:

Map Tools



The Map tool options are as follows:

Map Tool Options	
Item	**Details**
	Click the square on the bar and drag it up or down to change the zoom extent. Higher on the bar zooms out, while lower on the bar zooms in. Click the arrow at the top of the zoom bar to zoom out, or click the arrow at the bottom of the zoom bar to zoom in.
	Zoom in - click to view a smaller area of the map in more detail. Zooms in using the center of the view as the focal point.
	Zoom out - click to view a larger area of the map in less detail. Zooms out using the center of the view as the focal point.
	Pan - click the button then click the display and drag away from the area you want to reveal.
	Previous - click to return the view to the previous location and zoom extent.
	Next - click to re-display the view settings that were in place before using the Previous button.

	Show point / Show outline - click to view the active parcel as a pointer on the map, or with a red outline.
	Zoom to selected - click to view the immediate area of the selected parcel in more detail.
	Select - click the button, then select one of the options from the drop-down menu that displays. Note, you can only select parcels associated with tasks. By free-form area:  - click this button, then click on the map and, holding down your mouse key, draw the area that contains the parcels you want to select. By rectangle area:  - click this button, then click on the map and, holding down your mouse key, drag the outline of the rectangle area that contains the parcels you want to select. By line:  - click this button, then click on the map at each point around the area that contains the parcels you want to select.
	Deselect - click the button, then select one of the options from the drop-down menu that displays. Note, you can only select parcels associated with tasks. By free-form area:  - click this button, then click on the map and, holding down your mouse key, draw the area that contains the parcels you want to deselect. By rectangle area:  - click this button, then click on the map and, holding down your mouse key, drag the outline of the rectangle area that contains the parcels you want to deselect. By line:  - click this button, then click on the map at each point around the area that contains the parcels you want to deselect.
	Measure length - click the button, then click the start point of the length you want to measure, and, holding down your mouse key, drag the line that displays to the end point of the length you want to measure. When you release your mouse key, the distance measure displays at the bottom of the map area.

	Measure area - click the button, then click the start point of the area you want to measure, and holding down your mouse key, draw the outline of the area you want to measure. When you release your mouse key, the perimeter and volume of the area display at the bottom of the map area.
	Print or save - click the button, then in the dialog box that displays, select the print or save options you want to use.

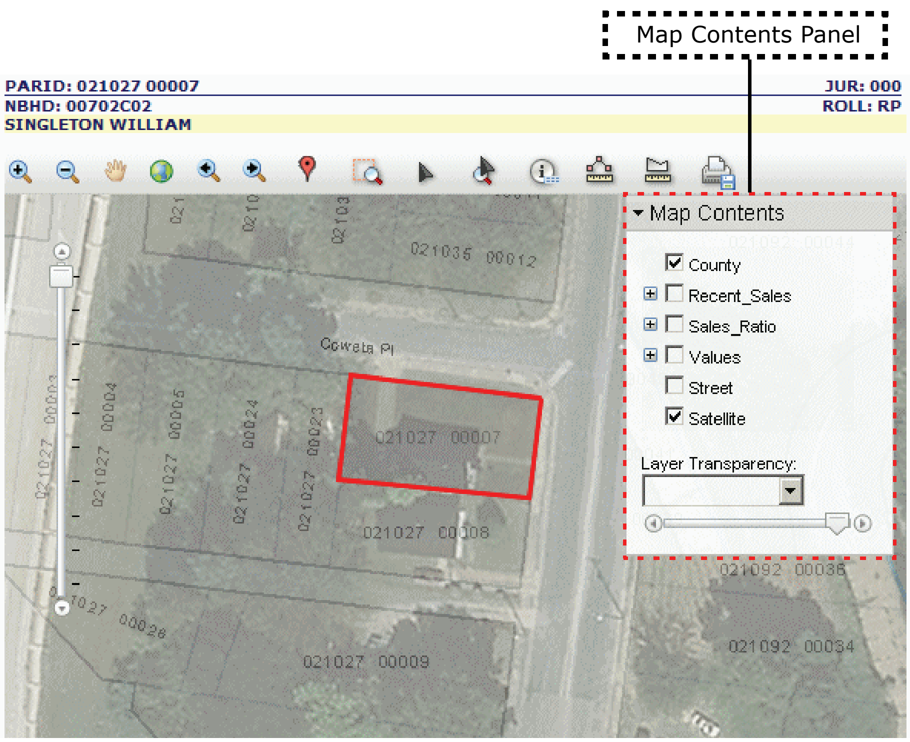
Using Map Layers

Map layers are listed in the Map Contents panel at the right of the map. The Map Contents panel provides a listing of all available layers, and can be used to select the details that are included on the map display. In this panel, only available layers can be selected or deselected. Some layers are not available at certain map resolutions; by changing the map resolution, you may see some layer options become active. Note, because the layers used vary by organization, we are unable to provide specifics of what details are available.

To change map layer information in the Map Contents panel:

1. Display the map at the resolution you want to use the layer with. If the layer check box is grayed out, you must zoom in or zoom out on the map until it becomes active.
2. Click the Map Contents bar at the top of the map to display the Map Contents panel.

Map Contents Panel



Options to use the Map Contents panel are as follows:

Map Contents Panel Options	
Item	**Details**
	Expand/Collapse Group - click the + or - sign at the left of the group to view the items it contains.
	Enable/Disable Option - click the check box to enable the item. When enabled, the information is added to the map display.
	Set Layer Transparency - Click the Layer Transparency field and select the item you want to make more or less transparent. When selected, the item name displays. After selecting the item, click the slider arrow to make it more or less visible on the map display. As you move the slider arrow, the transparency of the layer changes on the map.

Note: The specific contents and options in this Map Contents panel depend on your organization and role. Because of this, the details provided below are generic. For specific details about the options available to you, please contact your iasWorld administrator.

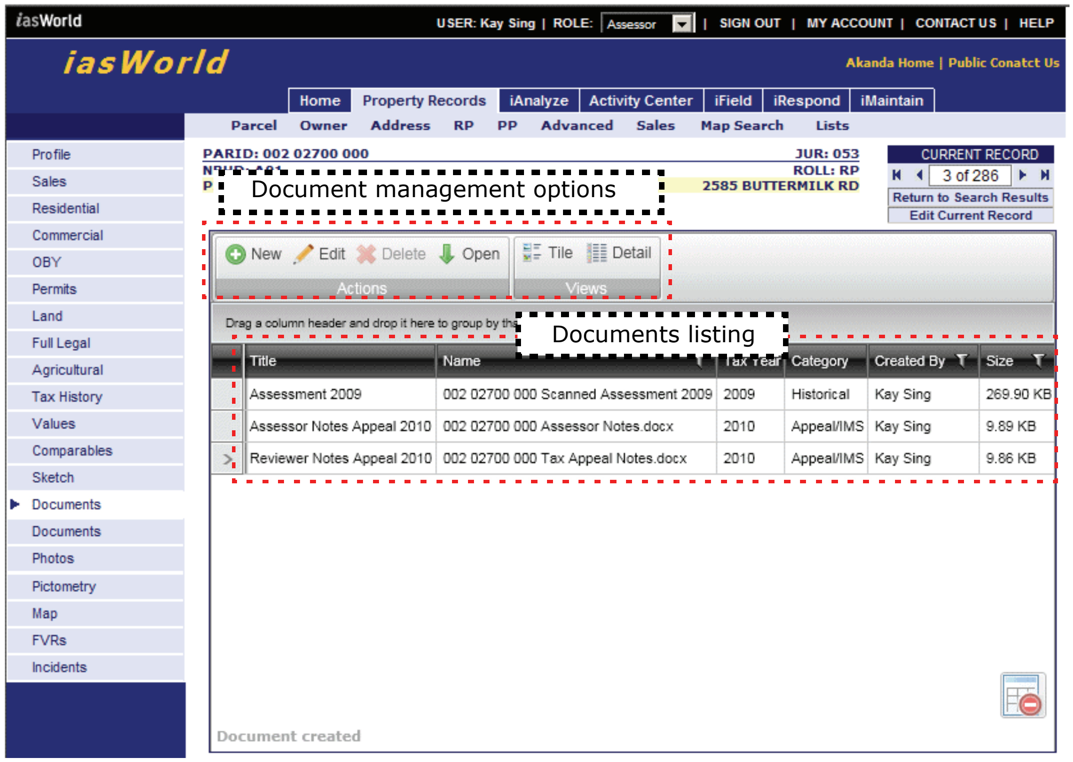
5 Using iDoc

The Details pages includes a Documents option if you have permission to download and view documents, and a Photos option if you have permission to download and view photos. Any documents or photos attached to a property record are visible, and can be selected to download, when the property record is displayed. You may also have permission to upload additional documents or photos, and edit or delete existing documents or photos.

You may also have access to the iDoc Search iTool. This tool provides the option to move documents or photos from one property record or another, to create a copy of a document or photo and associate it with any property record, and a search option, in addition to the standard iDoc options.

The documents and photos pages include three options to simplify locating documents or photos; a sort option, filter options, and the document or photos listing type option. The sort option enables you to display documents in groups that simplify locating an individual document, such as grouped by type. The filter option provides an advanced column filter for each column, which you can use to view documents with a particular attribute, such as the date on which they were created. The listing type option enables you to view documents as tiles or in a detail table, and view photos in a filmstrip, as tiles, or in a detail table.

iDoc interface, accessed with the Documents option in the Details menu.



Note: You may not have permission to use any of the options described in this section. If an option is not available, the access button will be grayed out.

For details about using documents or photos, see the following topics:

Locating a Document or Photo

Downloading a Document or Photo

Adding a New Document or Photo

Changing Document or Photo Properties

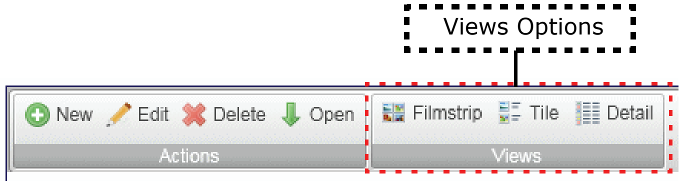
Deleting a Document or Photo

Using the iDoc Standalone iTool

Locating a Document or Photo

There are several options available to help you locate a document or photo in a large list. To begin, the Views options provide different types of access. The Details table includes multiple data details about each document, created specifically for your organization. You can also use the tiles view, which contains summary details about each document, and for photos options, a filmstrip, which contains a thumbnail view of each image.

To select a different view option, click the view type in the views area of the top ribbon:



Note: The Filmstrip option is only available with Photo Type listings.

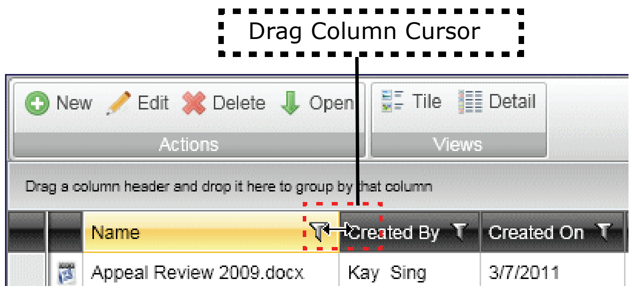
This section includes the following topics about locating documents and photos using sort and filter options:

Sorting Documents or Photos in the Details Table

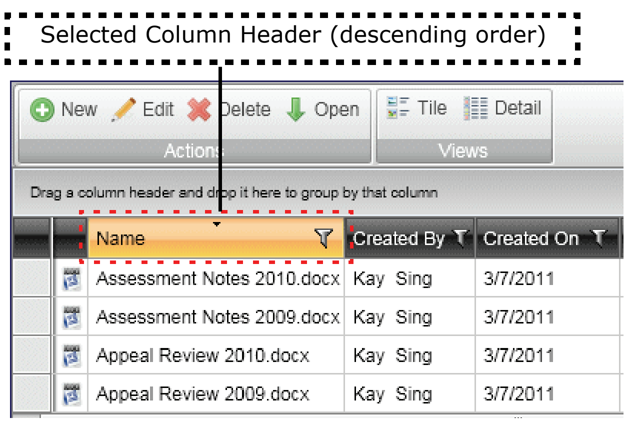
Using Column Filters in the Details Table

Sorting Documents or Photos in the Details Table

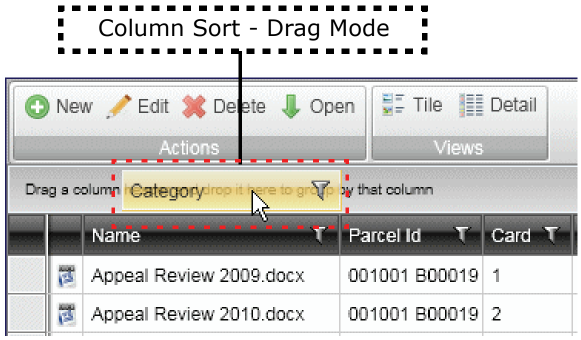
One way in which you can locate documents or photos in the details table is to resize a column so you can see more of the information it contains. As you hover your cursor over the edge of a column header, a two-headed arrow displays. When you see this arrow, you can click and hold down your mouse key, and drag the column edge in the direction desired:



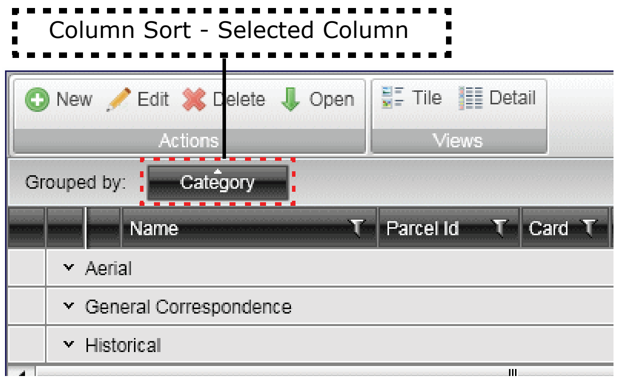
The documents or photos table can be sorted using column headers. If you click the header once, the table is sorted in ascending order by that column value (lowest value first), and if you click the header again, the table is sorted in descending order (highest value first):



You can also sort the documents or photos in the details table to display in groups defined by any column. To organize documents by column value(s), you drag the column header into the gray bar at the top of the top of the details table. As you drag the column header up into the gray bar, it continues to display, slightly translucent, as shown:

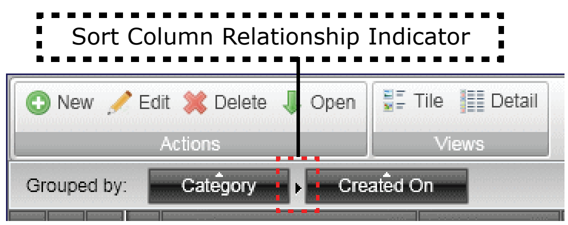


When you release your mouse button, the details table is refreshed, and documents or photos are sorted and grouped using the selected column:

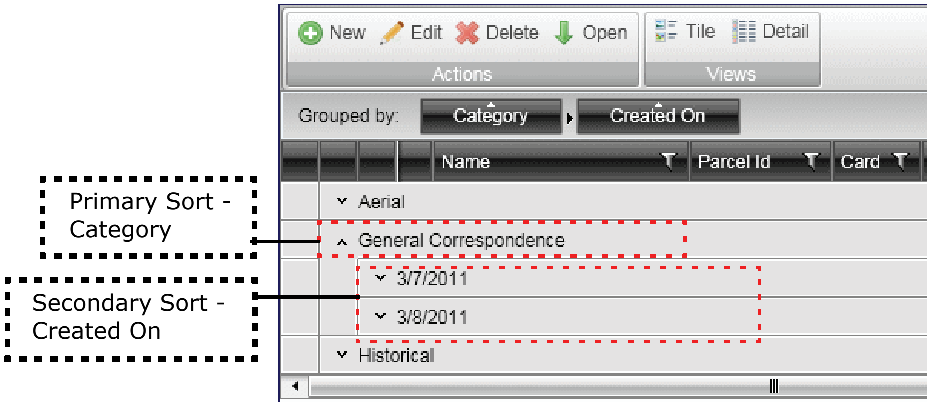


You can also add additional sort columns (in the same way, by dragging the column header into the top gray bar), and define the order in which they sort and group documents or photos.

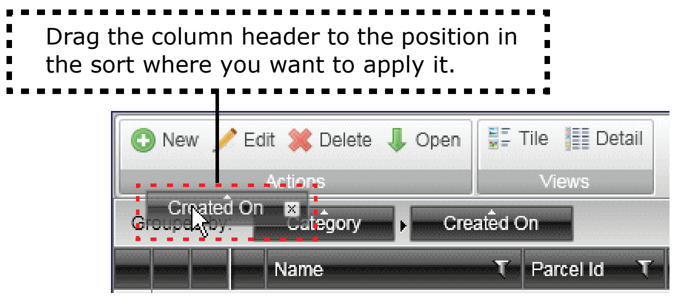
In the example below, you can see the relationship between the two sort columns selected; the Category column is the primary sort value, and the Created On is the secondary sort value:



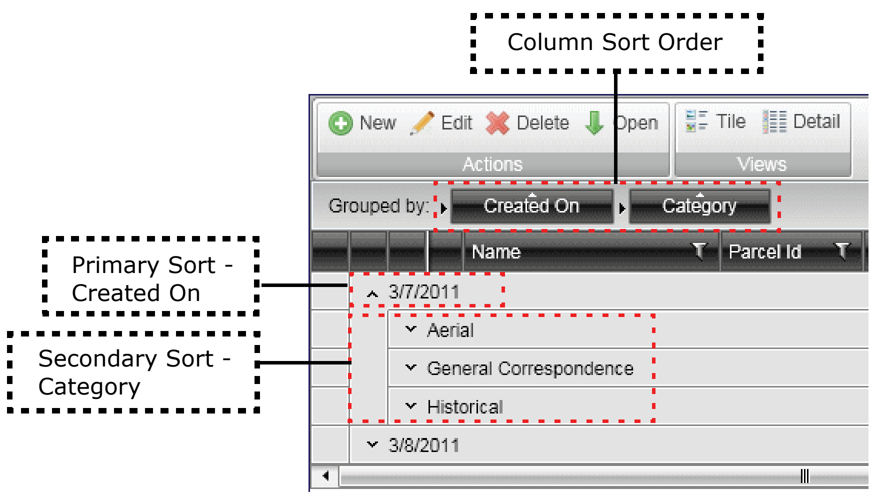
With the two sort columns in the primary/secondary relationship shown, the contents of the details table are sorted as shown here:



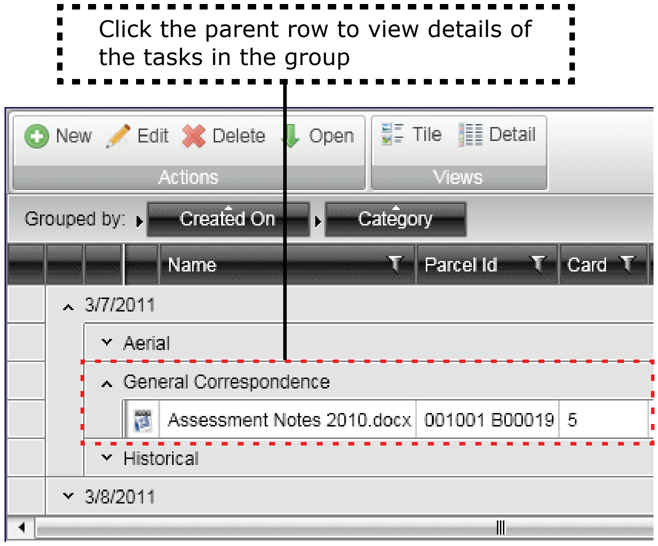
You can change the order of the primary/secondary sort columns (and additional sort columns, if applicable) by dragging the columns to the position you want. In the example below, the secondary sort column is being dragged into primary position:



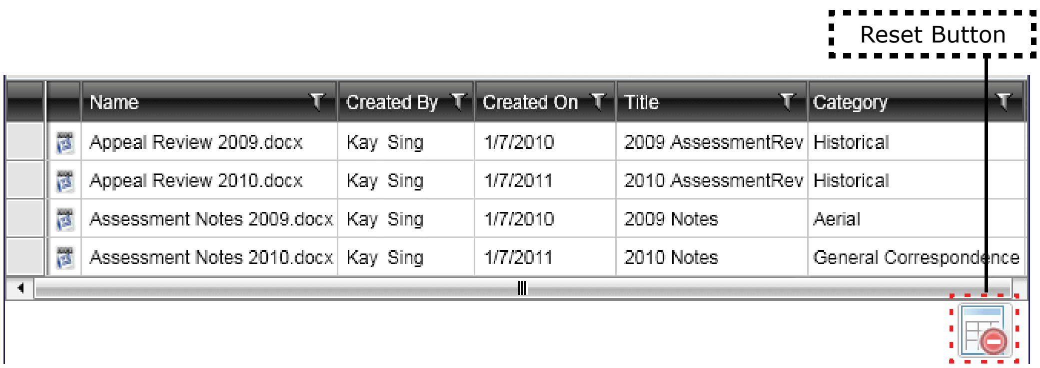
After you release the column header in the top gray bar, documents or photos are re-sorted based on the new primary/secondary sort values, as shown:



When the details table is being sorted by columns in the gray bar, you can expand any of the groups and view details. To expand the group, click anywhere in the parent row:



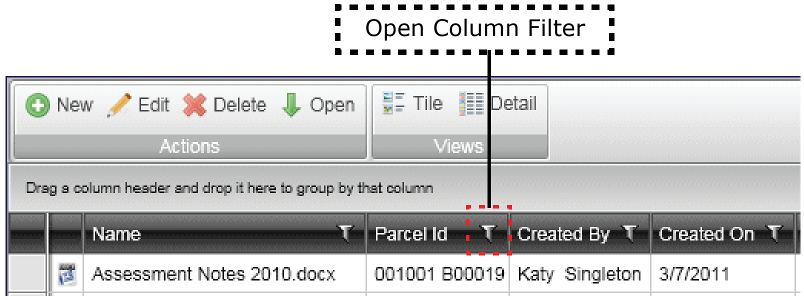
After sorting the documents or photos in the details table, you can return the listing back to the original order by clicking the refresh button, located at the bottom right of the table:



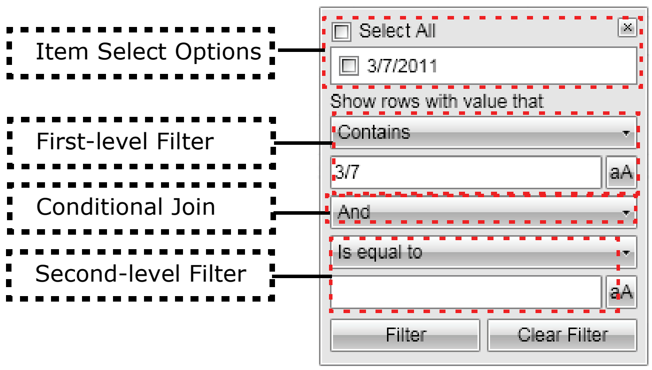
Using Column Filters in the Details Table

Column filters are available for each column in the details table. The column filter provides several value fields that can be combined with conditions. For example, to display only documents or photos created on the 1st of July, you open the Created On filter, enter 7/1 in the value field, and select the condition ‘Contains’.

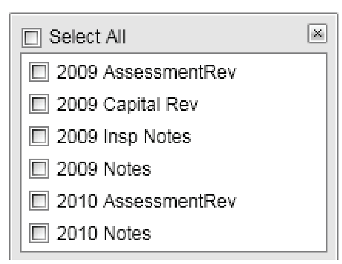
To open a column filter, simply click the pin icon at the top right of the column:



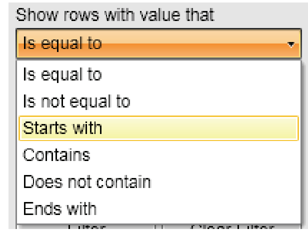
The column filter contains several standard elements, as shown here:



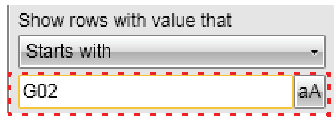
Options for the column filter are as follows:

Filter Options	
Item	**Details**
Item Select Box	Enable the items you want to display in the details table, and disable the items you want to hide: 

<table>
<tr>
<td>First-level Filter</td>
<td>
Click the Is equal to selection field and select one of the filter values:

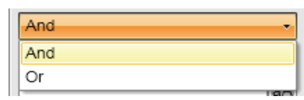


Then enter the text or numbers the filter should be applied to in the entry field:



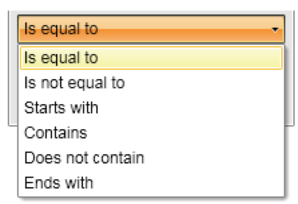
Click 

to filter using the first-level filter, or enter a conditional join and second-level filter value.
</td>
</tr>
<tr>
<td>Conditional Join</td>
<td>
Click the And selection field and select one of the conditions:

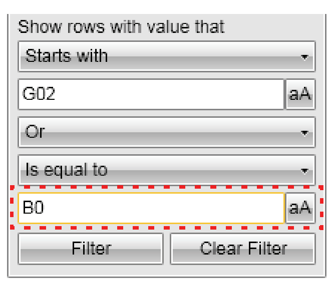


And: Must satisfy both first-level filter value and second level-filter value.

Or: Can satisfy either the first-level filter value or the second-level filter value.
</td>
</tr>
<tr>
<td>Second-level Filter</td>
<td>
Click the Is equal to selection field and select one of the filter values:



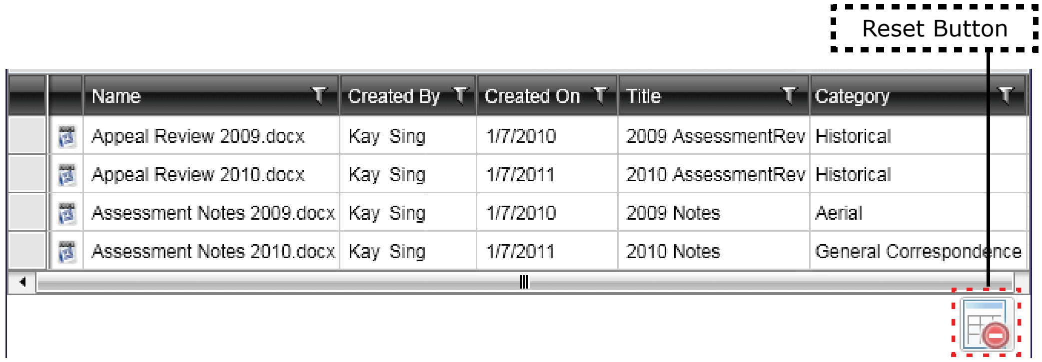
Then enter the text or numbers the filter should be applied to in the entry field:



Click 

to view your results.
</td>
</tr>
</table>

After filtering the documents or photos in the details table, you can return the listing back to the original order by clicking the refresh button, located at the bottom right of the table:



Downloading a Document or Photo

When you download a document or photo, you create a personal copy, which you can use as required. Downloading a document or photo does not affect the original, which will continue to be available to other iasWorld users.

Note: This section describes downloading a document or photo in PRM. The process is identical in the iDoc iTool (iDoc Search), but locating a property record or transaction ID is different. For details, see Using the iDoc Standalone iTool.

To download a document or photo:

1. Complete a search to locate the property record that includes the document or photo you want to download.
2. Select the property record in the search results list. The selected property record displays on the Profile details page.
3. In the details menu at the left of the page, select the Documents or Photos option to view documents or photos associated with the property record.
4. In the document or photo list, click the document or photo you want to download. The document or photo details are highlighted.
5. At the top of the document or photo page, click  . The download dialog box displays.

Note: The type of dialog box that displays depends on your system.

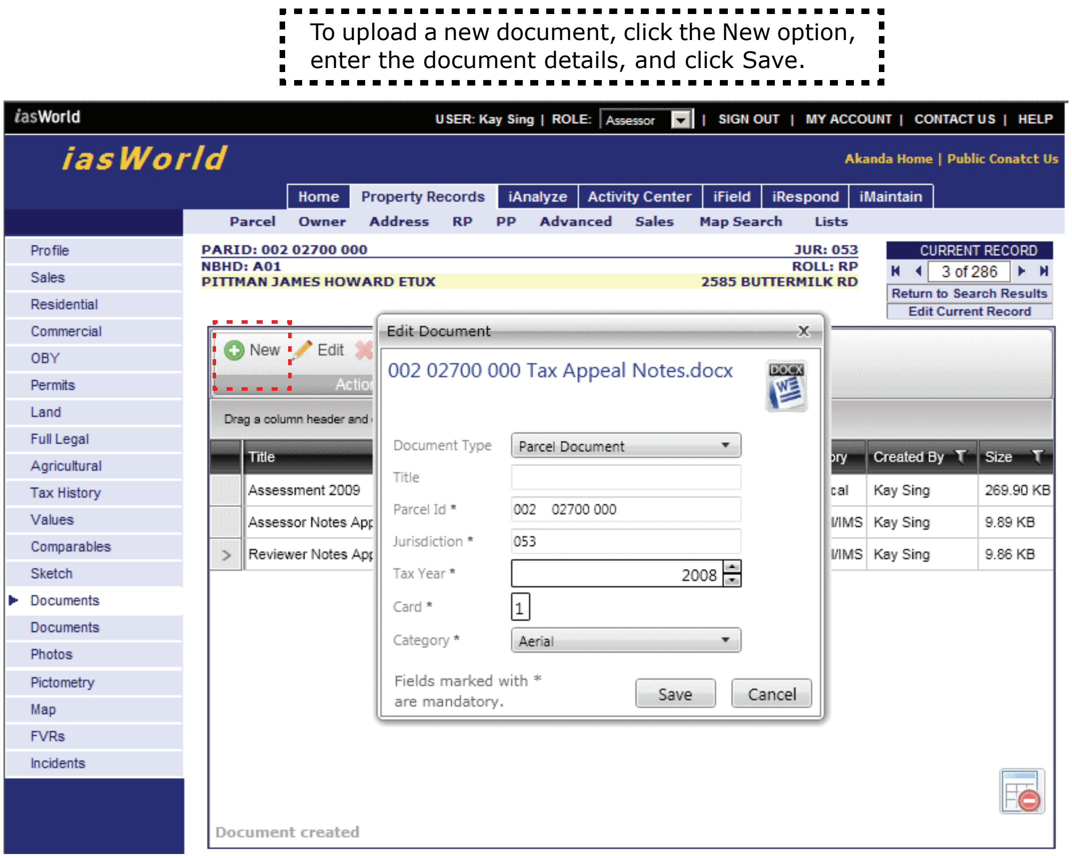
6. As required, select the location in which you want to save the document or photo using the available options.

Adding a New Document or Photo

If your administrator has provided you with the ‘Create’ access permission, you can add (upload) documents or photos to property records. When you add a new document or photo, you attach it to a property record with a selection of attributes that simplify identifying and/or locating it. For two attributes you select, the tax year and document type, you are also creating access security; users in roles without access to the selected tax year or document type will be unable to access the document or photo. All uploaded documents or photos are also automatically stamped with the date and time they were uploaded, and your iasWorld user name.

The Photos option provides a thumbnail of uploaded images, while the Documents listing provides data details only. You can upload photos or other image types into any of the document categories, and upload documents into the Photo category. If you upload an image into a document category, it will only be available to view or download in the Documents listing, which does not have a filmstrip view option. If you upload a document into the Photo category, it will be available to view or download in the Photos listing. All images or documents will display correctly for users when they are downloaded, whatever category they are uploaded into.

Note: This section describes adding a document or photo in PRM. The process is identical in the iDoc iTool (iDoc Search), but locating a property record or transaction ID is different. For details, see Using the iDoc Standalone iTool.

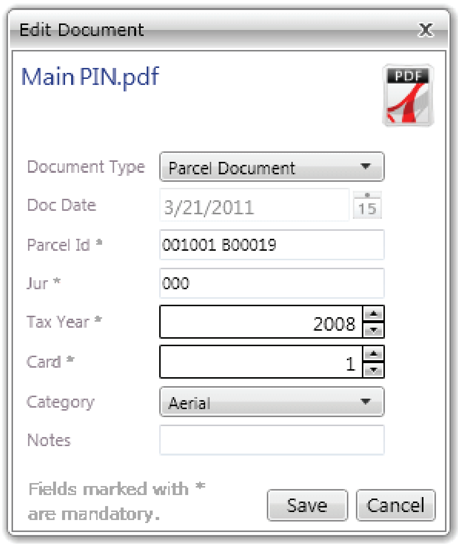


To add a new document or photo to a property record:

1. Complete a search to locate the property record to which you want to attach a document or photo.
2. Select the property record in the search results list. The selected property record displays on the Profile details page.
3. In the details menu at the left of the page, select the Documents or Photos option.
4. At the top of the document or photo page, click  . The select dialog box displays.

Note: The select document or photo dialog box that displays depends on your system configuration.

5. Using the options in the select dialog box, locate and select the document or photo that you want to upload. Once selected, the upload dialog box displays:



The typical upload document options are as follows:

Upload Document Options	
Option	**Details**
Document Type	Select the document type that the document or photo is associated with. Note: The same type must be selected for the document or photo to be visible for other users.

Tax Year	If required, click the Tax Year field, and in the list that displays, select the tax year that the document or photo is associated with. The same tax year must be selected for the document or photo to be visible for other users.
Card	If required, click the Card field, and enter the number of the card that the document or photo is associated with.
Category	If required, click the Category field, and in the list that displays, select the category that the document or photo is associated with.
Title	Click the Title field, and enter a title for the document or photo.
Jur	This field will typically be auto-filled. If it is not auto-filled, click in the field and enter the jur of the property record you are adding the document or photo to.
Parcel ID	This field will typically be auto-filled. If it is not auto-filled, click in the field and enter the Parcel ID of the property record you are adding the document or photo to. You must use the format (including spaces) used for the Parcel ID, or your upload request will fail.

6. At the bottom of the upload form, click Save. The document or photo is uploaded, and displays in the document or photo list for the selected property record.

Changing Document or Photo Properties

The Properties dialog box provides the system-supplied details about the document or photo that cannot be changed (such as the date on which the document or photo was uploaded, and the parcel ID that it is associated with), and user-supplied details that may be editable. Fields can be configured to be read-only, which means that, even if you have permission to edit the document or photo type, you will not be able to make changes to some fields.

Note: This section describes changing document or photo properties in PRM. The process is identical in the iDoc iTool (iDoc Search), but locating a property record or transaction ID is different. For details, see Using the iDoc Standalone iTool.

To change document or photo properties:

1. Complete a search to locate the property record that includes the document or photo for which you want to change properties.
2. Select the property record in the search results list. The selected property record displays on the Profile details page.

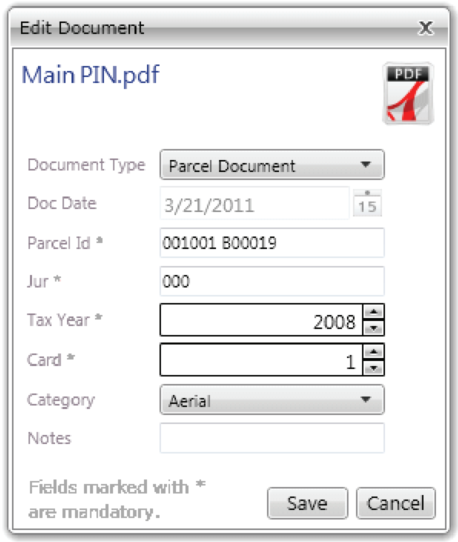
3. In the details menu at the left of the page, select the Documents or Photos option.

4. Display the document or photo for which you want to view or change properties, using the steps described in the section Locating a Document or Photo above.

5. In the document or photo list, click the document or photo for which you want to view or change properties. The details are highlighted.

6. At the top of the document or photo page, click 

. The properties dialog box displays.



Document properties options are as follows:

Upload Document Options	
Option	**Details**
Document Type	Cannot be changed.
Created By	Cannot be changed.
Created On	Cannot be changed.
Category	If required, click the Category field, and in the list that displays, select the category that the document or photo is associated with.
Title	If required, click the Title field, and enter a title for the document or photo.
Parcel ID	This field is typically locked. If you have permission, click in the field and edit the Parcel ID number as required.

Tax Year	If required, click the Tax Year field and select a tax year. Note, changing this value may hide the document or photo from some users, as restrictions on viewing documents or photos are based on type and tax year.
Card	If required, click in the Card field and enter a card number.

7. At the bottom of the Document Properties form, click Save. The changes to the document or photo properties are saved and display in the document or photo list for the selected property record.

Deleting a Document or Photo

When you delete a document or photo, it is permanently deleted from iasWorld. Any copies downloaded and saved will not be affected.

Note: This section describes deleting a document or photo in PRM. The process is identical in the iDoc iTool (iDoc Search), but locating a property record or transaction ID is different. For details, see Using the iDoc Standalone iTool.

To delete a document or photo:

1. Complete a search to locate the property record that includes the document or photo you want to delete.
2. Select the property record in the search results list. The selected property record displays on the Profile details page.
3. In the details menu at the left of the page, select the Documents or Photos option.
4. Select the document or photo you want to delete. When selected, the document or photo is highlighted.
5. At the top of the document or photo view area, click Delete. A prompt displays, asking you to confirm you want to delete the selected document or photo.
6. Click Yes. The document or photo is permanently deleted from the document or photo list for the selected property record.

Note: Depending on your system configuration, you may only be deleting the copy available for the selected property record, or, you may be deleting the document or photo from your entire system. Please consult your system administrator for details.

Using the iDoc Standalone iTool

The standalone iDoc iTool provides three additional options; to copy documents, to move documents from association with one parcel ID or transaction ID number to another, and to use a search option to locate documents or parcels. Within the iDoc iTool, you work with the documents or photos associated with one property record or specific transaction ID number at a time.

Note: You may not have permission to use any of the options described in this section. If an option is not available, the access button will be grayed out.

This section includes the following topics:

Open Documents in the iDoc Search iTool

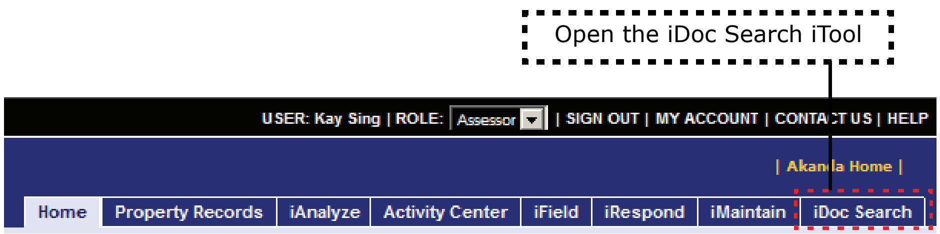
Copying a Document or Photo

Moving a Document or Photo

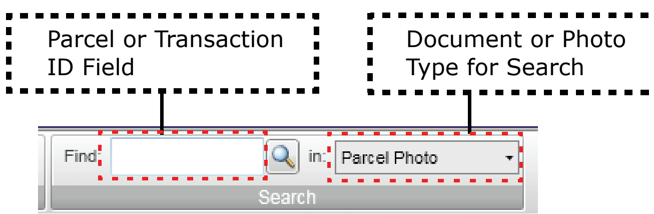
Open Documents in the iDoc Search iTool

To use the iDoc tool, you must locate a single parcel ID or other unique transaction ID to work with the documents or photos associated with it. You must know the exact parcel ID or transaction ID number to retrieve the documents or photos you want to use. If necessary, you can find a parcel ID number using the text search options, described in the sectionText Search for Property Records.

To open the iDoc iTool, click the iDoc Search option in the top iasWorld menu:



The search can only be applied to one parcel or transaction ID and one document or photo type at a time. In order to search, you must enter the parcel or transaction ID and select the document or photo type of the document or photo you want to locate:



To locate all documents or photos in a document type for a parcel or transaction ID:

1. On the top menu, click the iDoc menu option. The iDoc iTool opens.
2. In the Find field, enter the parcel or transaction ID associated with the document(s) or photo(s) you want to locate.
3. At the right of the Find field, click the document type field, and from the drop-down list of documents that display, select the document or photo type that includes the document(s) or photo(s) you want to locate. When selected, the document or photo type name displays.

4. At the right of the Find field, click . All documents or photos in the selected document or photo type associated with the parcel ID or transaction ID display.

Copying a Document or Photo

The copy option is only available in the iDoc iTool. When you copy a document or photo, you provide the parcel or transaction ID and jurisdiction code where you want to put the copy. The copy is identical to the original, including the card number, document type, and document category.

To copy a document or photo:

1. On the top menu, click the iDoc menu option. The iDoc iTool opens.
2. In the Find field, enter the parcel ID or other unique transaction ID associated with the document or photo you want to copy.
3. At the right of the Find field, click the document type field, and from the drop-down list of documents that display, select the document or photo type that includes the document or photo you want to copy. When selected, the document or photo type name displays.
4. At the right of the Find field, click . All documents or photos associated with the parcel or transaction ID in the selected document or photo type display.
5. In the listing of documents or photos, click the document or photo you want to copy. The document or photo is highlighted to indicate it is selected.
6. In the Actions section at the top of iDoc, click . The copy document dialog box displays.
7. In the parcel or transaction ID field, enter the parcel or transaction ID where you want to create the copy.
8. In the Jur field, enter the jurisdiction code of the property record or transaction where you want to create the copy.
9. Note: You must exactly match the parcel ID or transaction ID and jurisdiction code where you want to create the copy. If you do not, the document or photo will not be copied.
10. Click . The document or photo is copied to the selected property record or transaction.

Moving a Document or Photo

The move option is only available in the iDoc iTool. When you move a document or photo, you provide the parcel or transaction ID and jurisdiction code where you want to move it. The document is moved with all the original settings, including the card number, document type, and document category. The moved document is no longer available for the original parcel or transaction ID.

To move a document or photo:

1. On the top menu, click the iDoc menu option. The iDoc iTool opens.
2. In the Find field, enter the parcel or transaction ID that includes the document or photo you want to move.
3. At the right of the Find field, click the document type field, and from the drop-down list of documents that display, select the document or photo type that includes the document or photo you want to move. When selected, the document or photo type name displays.
4. At the right of the Find field, click . All documents or photos associated with the parcel or transaction ID in the selected document or photo type display.
5. In the listing of documents or photos, click the document or photo you want to move. The document or photo is highlighted to indicate it is selected.
6. In the Actions section at the top of iDoc, click . The move document dialog box displays.
7. In the parcel or transaction ID field, enter the parcel or transaction ID where you want to move the selected document or photo.
8. In the Jur field, enter the jurisdiction code of the property record or transaction where you want to move the document.

Note: You must exactly match the parcel or transaction ID and jurisdiction code where you want to move the document. If you do not, the document or photo will not be moved.

9. Click . The document or photo is moved to the selected property record or transaction.

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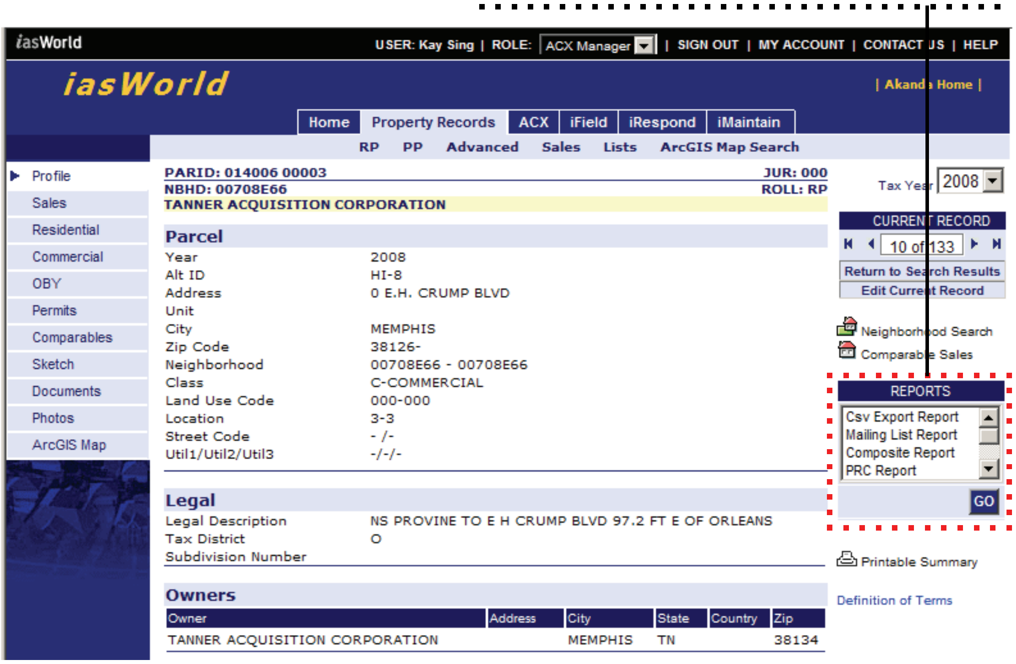
6 Using Reports

The Details page includes a Reports pane at the right of the page. The reports available in the Reports pane depends on your organization. You can print these reports, or save them in a location of your choice. In addition to iasWorld report options, you may also have access to IAS reports.

To create and print a standard iasWorld report:

1. Using the search options available in the Property Records tab, locate the property record for which you want to create a report.
2. At the right of the Search Results page, in the Reports pane, click the report you want to create and print, and click GO. The selected report displays in a new window .

Click one of the report options, then click the Go button.



3. From the top menu on the report window, select File|Print. The selected report is printed.

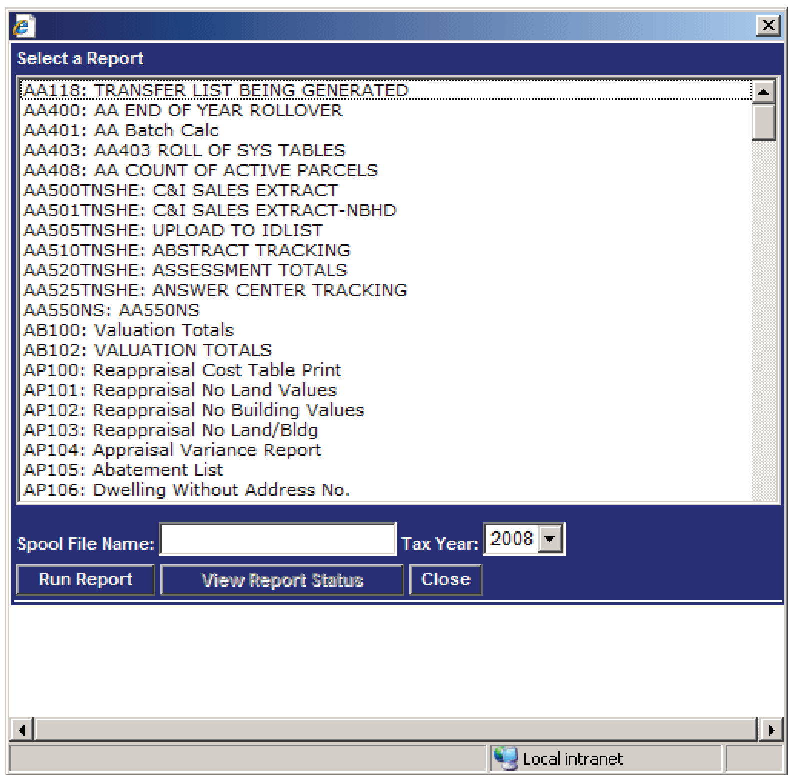
- OR -

4. From the top menu on the report window, select File|Save As, and save the report in the location of your choice.

To create and print an IAS report:

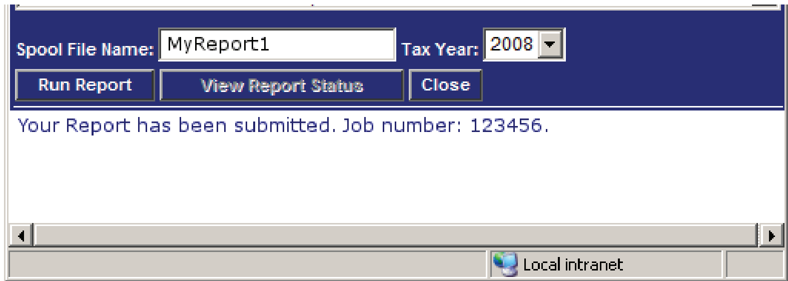
1. Using the search options available in the Property Records tab, locate the property record for which you want to create a report.
2. At the right of the Search Results page, in the Reports pane, click IAS Report(s), and click 

. The Select a Report dialog box displays:



3. In the Select a Report dialog box that displays, selec the report you want to generate. When selected, the report is highlighted.
4. In the Report Field Name field, enter a name for the report you want to generate. The name you enter will be used to identify the report when it is generated.
5. If required, click the Tax Year field, and from the list that displays, select the tax year roll that will be used to select data. When selected, the tax year displays.

6. At the bottom of the list of reports, click Run Report. A message displays, advising you that your report has been submitted, and providing a job number:



7. Once the job number displays, click View Report Status. The iMaintain Reports Pool Manager opens, and you can select your report to view, save, or print.

Note: For details about using the iMaintain Reports Pool Manager, please refer to the iMaintain documentation.

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7 Using Pictometry

The Pictometry option enables you to view photo views of property records, with tools to locate, navigate, measure and save the visible details. There are two types of pictometry available in iasWorld - POL pictometry and NIW pictometry. Your iasWorld administrator will be able to advise you which version of pictometry you are using.

For complete details, see the section below:

Using POL Pictometry

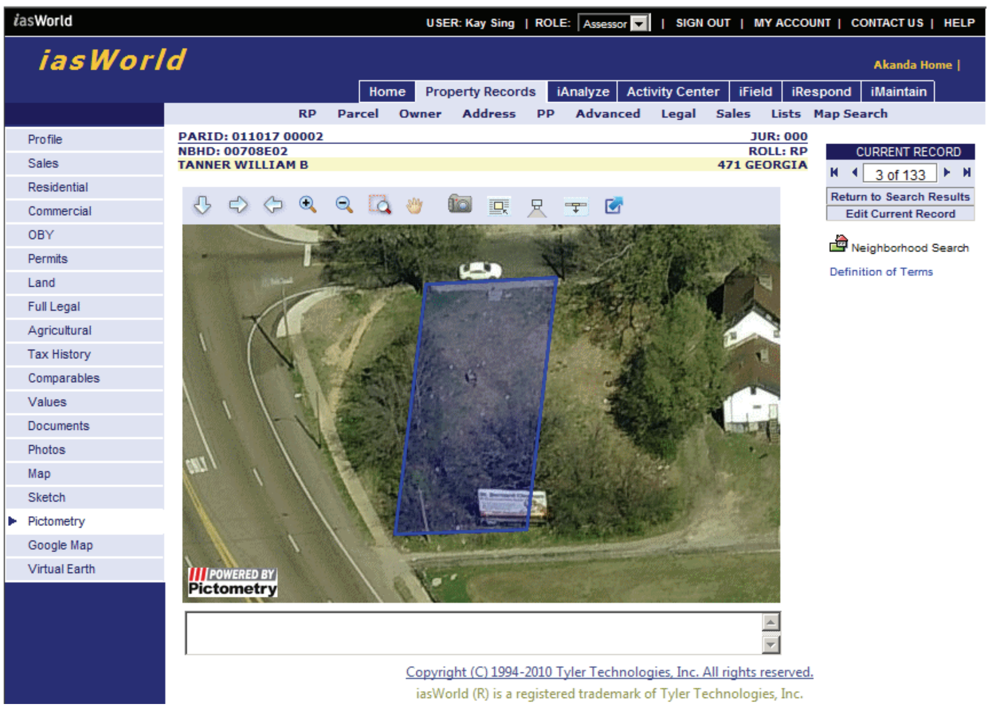
Using NIW Pictometry

Using POL Pictometry

The POL pictometry option is one version of pictometry available with iasWorld. If you do not see the pictometry details shown below, please refer to the next section, Using NIW Pictometry.

POL pictometry provides options to view the subject property record using pictometry images, along with options to navigate and view the area in which the property record is located, measure items, and save any photo views of interest. In addition, you can change the date of the image displayed (if images from alternative dates are available), and view and select parcels on the view.

POL Pictometry view, available on the search details menu



Measure options include measuring lengths, heights, elevations, and areas. Options to view the subject property record in different ways include:

- Change the view angle (oblique vs. orthogonal)
- Rotate the view to view the parcel from different compass directions
- Include or hide the parcel outline

This section includes the following topics:

Pictometry View Options

Capture View

Split-Screen Comparison View

[Parcel Identification and Selection Options](#)

[Measurement Options on the Pictometry View](#)

Pictometry View Options

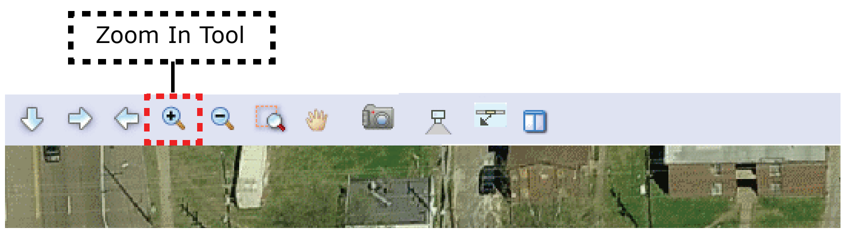
The view options described in this section enable you to change the focus area of the pictometry view, change the angle of the view, change the contents of the view (a smaller area or a larger area), and finally, change the image date (the date on which the pictometry images were captured).

To view a subject property record in the pictometry interface:

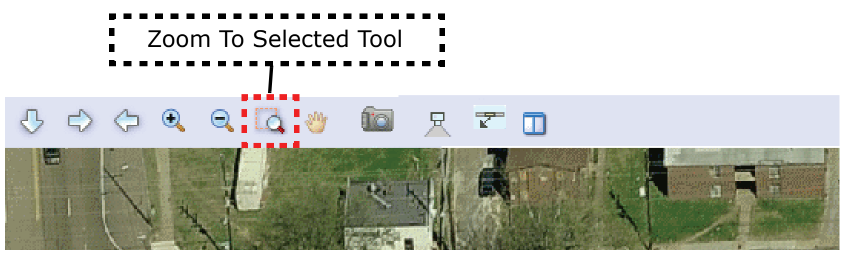
1. After completing a search, click the property record of interest. Details of the selected property record display on the Profile details page.
2. At the left of the page, in the details menu, click the Pictometry option. The pictometry view displays.

Use the navigation options on the pictometry interface to view the subject property record as follows:

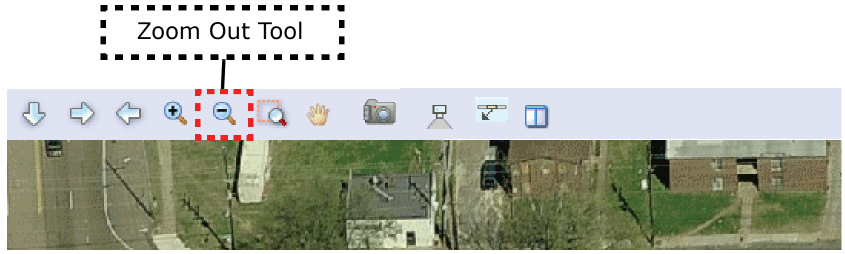
- Zoom In: Click the zoom in tool on the top menu bar. The view zooms into the center point of the displayed area. Note, you can also use your mouse roller (if applicable), to zoom in.



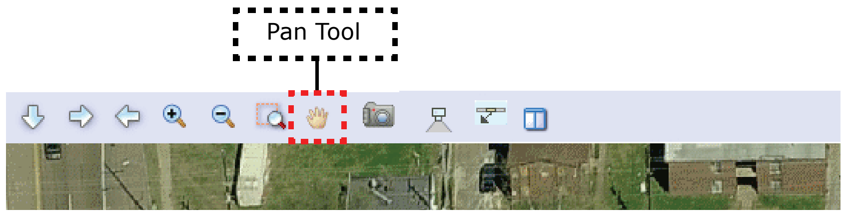
- Zoom To Selected: Click the zoom to selected tool on the top menu bar. The view zooms in to the active property record.



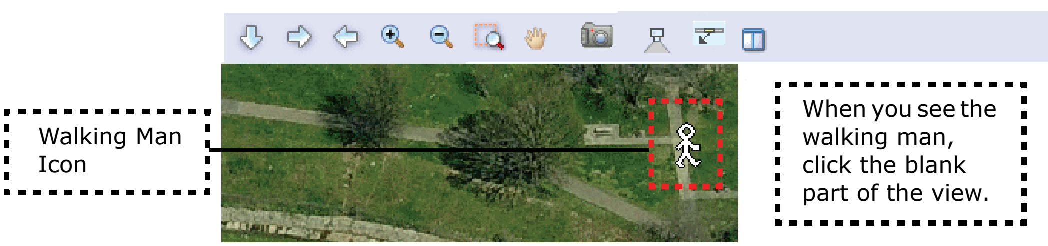
- Zoom Out: Click the zoom out tool on the top menu bar. The view zooms out from the center point on the display by a predetermined percentage. Note, you can also use your mouse roller (if applicable), to zoom out.



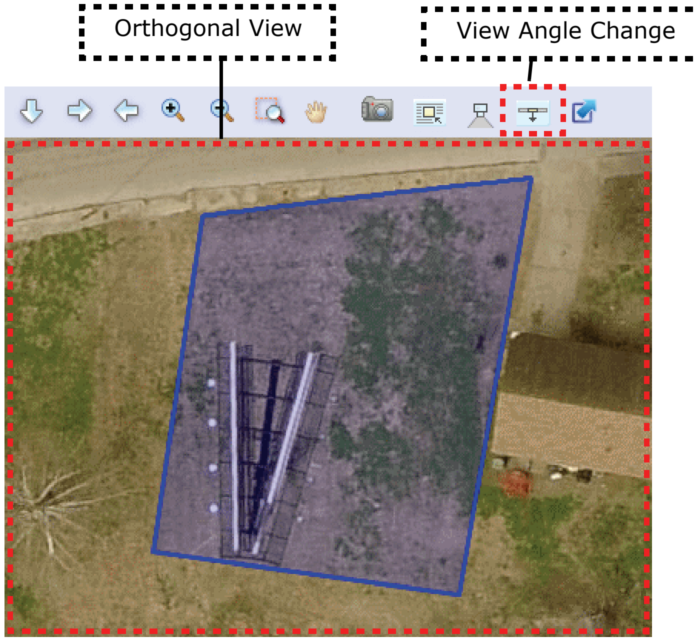
- Pan: Click the pan tool on the top menu bar, then click anywhere on the pictometry display, and, holding down your mouse key, drag the display away from the part of the map you want to display. The map area moves in the direction of your cursor as you drag it.



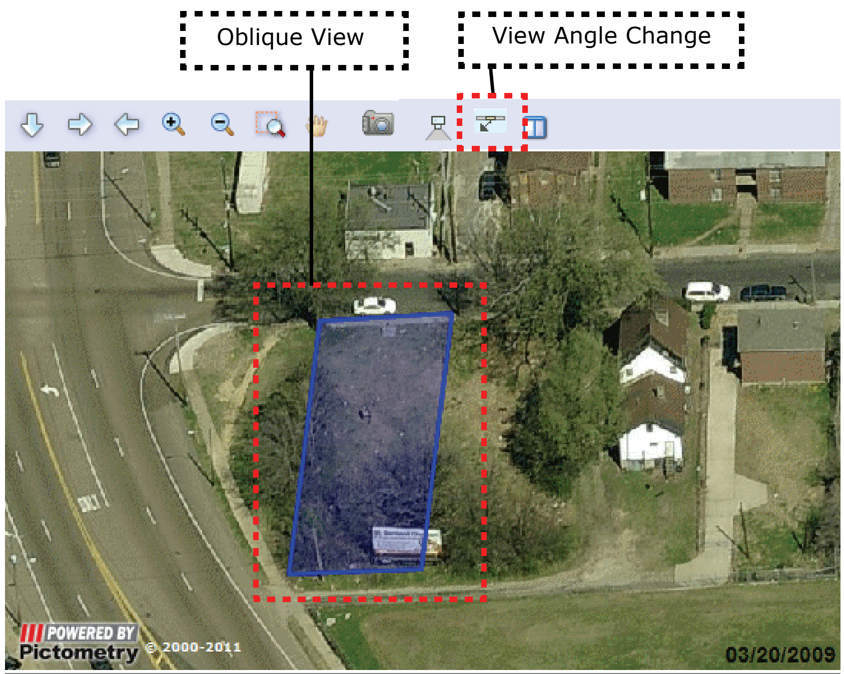
Note: When you use the pan tool, you may occasionally see your cursor change to a 'walking man' icon, and a blank white section on the view. The walking man icon indicates the edge of a pictometry image - simply click the blank part of the view once and the missing portion will be retrieved and displayed.



- View Angle - Orthogonal: Click the oblique/orthogonal tool to change the type of pictometry images that display. The orthogonal view is at a 90 degree angle to the ground, or directly down, (enabling you to see and optionally measure the parcel), as shown. Note, the top of the view is always directly north when the view is orthogonal.



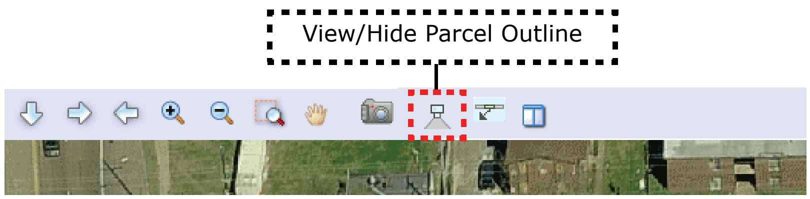
- View Angle - Oblique: Click the oblique/orthogonal tool to change the type of pictometry images that display. The oblique view is at approximately 40 degree angle to the ground, as shown:



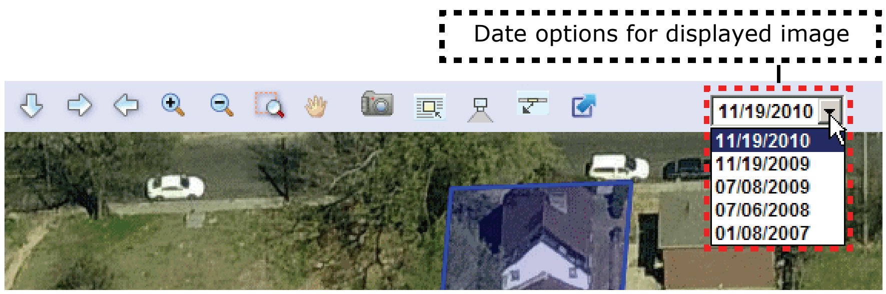
- Rotate Image: The oblique view can be rotated, so you can explore the parcel from different compass points. The image rotation options available are as follows:

Rotate Image Options	
Item	**Details**
	**Rotate the image to view the parcel from above.**
	**Rotate to the right - view the parcel from the compass direction to the left of the current view.**
	**Rotate to the left - view the parcel from the compass direction to the right of the current view.**

- View Contents - Neighborhood/Community: Click the view change tool on the top menu bar. With each click, the view level changes. The neighborhood view shows more area, while the community view shows the immediate area around the subject property record.



- View Image by Date: To change the date of the image that is displaying, click the date drop-down field in the top menu bar, and select the date of the image you want to view:

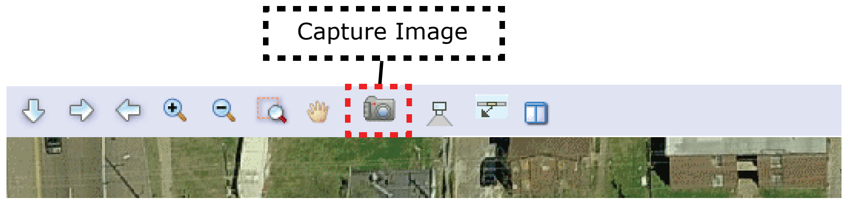


Capture View

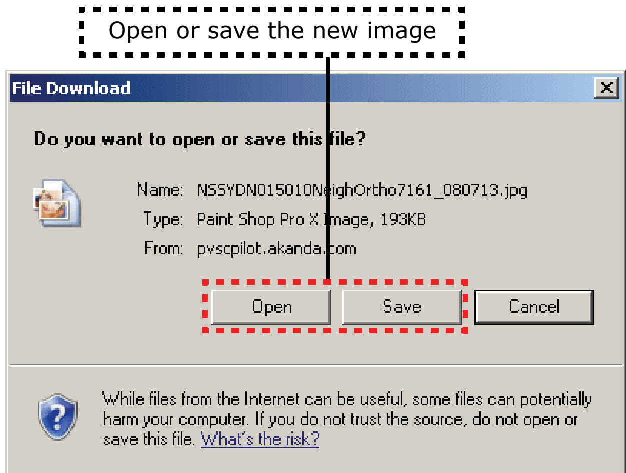
You can capture and save the visible contents of the pictometry view as required. When you use this option a jpg file of the pictometry view is created, and you are given the option to open or simply save the new jpg file.

To capture the pictometry view:

1. At the top of the pictometry view, click the capture image tool. The image is captured.



2. In the File Download dialog box that displays, select Open or Save for the new image.



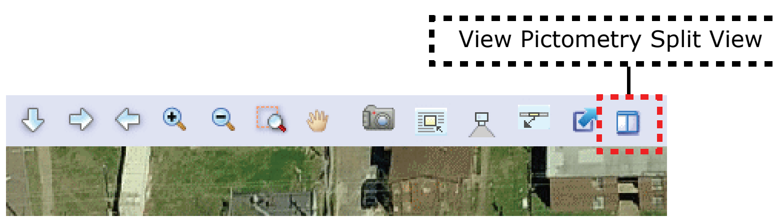
Split-Screen Comparison View

The pictometry view provides the option to display two pictometry images, side by side, in a standalone interface. Both pictometry images provide the complete pictometry menu. They can be moved independently, and you can select a different date for the pictometry view to compare changes over time.

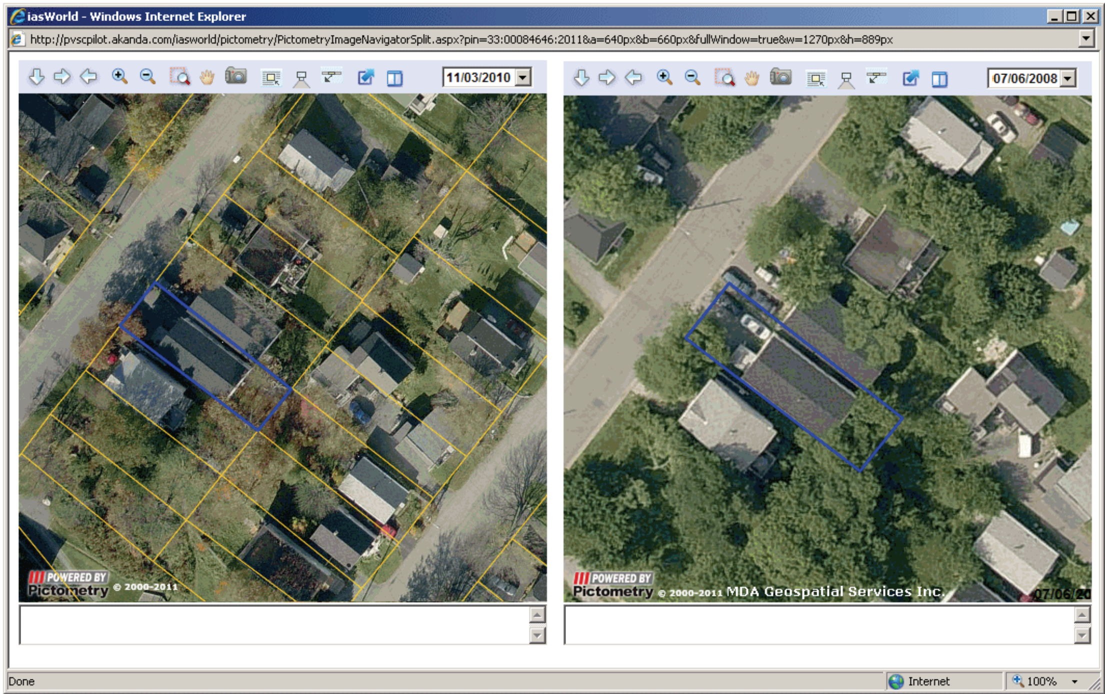
Note: For details about the options for these two pictometry images, see the rest of this section about using the Pictometry view.

To display a split screen comparison view:

1. After opening the pictometry view, on the top tools menu, click the Split tool:



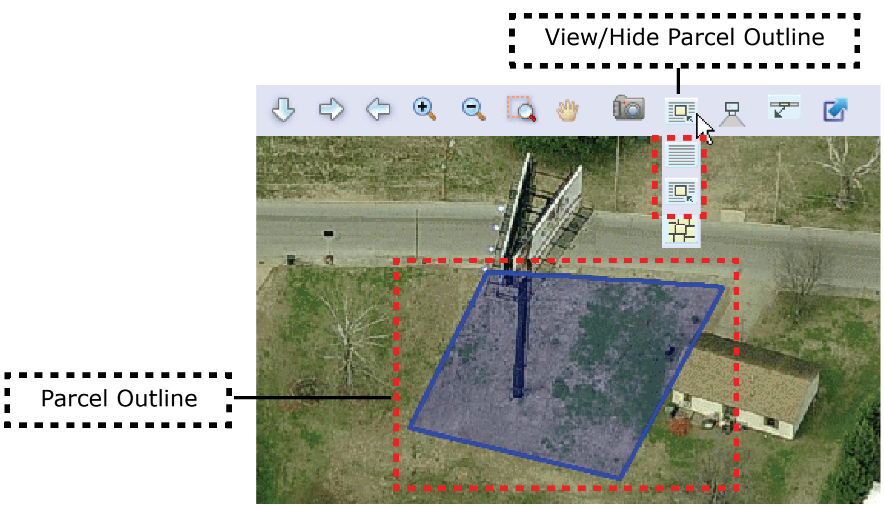
The active contents of the view display, in duplicate, in a new standalone interface.



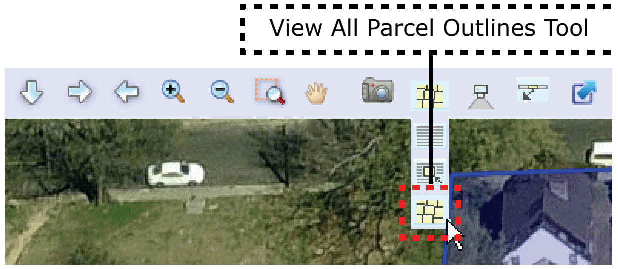
Parcel Identification and Selection Options

The pictometry view provides three options that enable you to view and select parcels. The view/hide parcel outline option enables you to view the pictometry without a parcel outline for the active property record. The view all parcel outlines option, enables you to display outlines for all parcels. The select parcel option enables you to select a parcel on the view, and load, and then review, details for the selected parcel on the details pages.

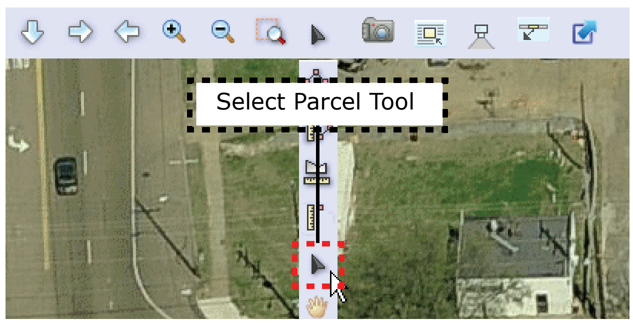
- View/Hide Parcel Outline: Click the Overlay option on the top menu bar, and select either the view parcel outline or hide parcel outline option:



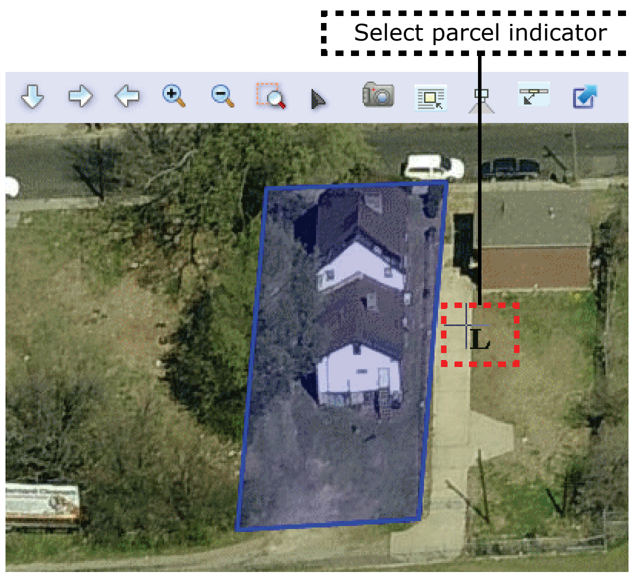
- View All Parcel Outlines: Click the Overlay option on the top menu bar, and select the view all parcel outlines option:



- Select a Parcel: Click the View/Hide tool on the top menu bar, and select the select parcel tool:



- Click the point on the image that is within the parcel outline you want to select:



Measurement Options on the Pictometry View

The pictometry view includes measurement tools which can be used to measure a distance, height, area, or elevation. Both the length and area tools can be used in line mode (which creates straight lines), or freehand (which creates lines that follow the movement of your cursor). The height tool is only available in straight line mode.

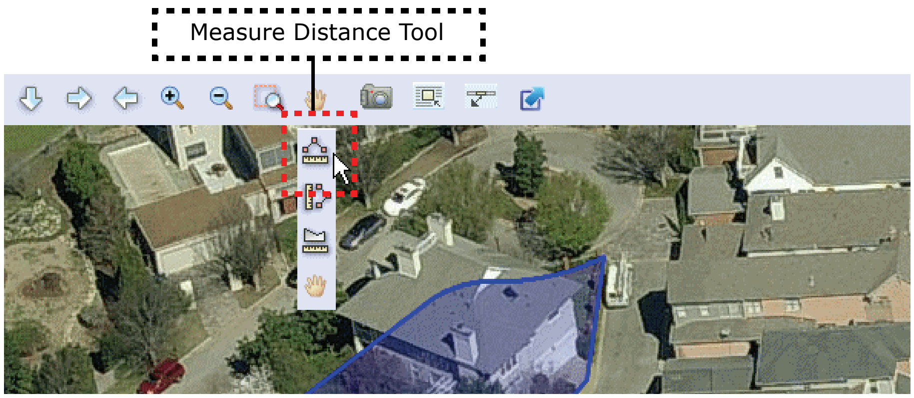
This section includes the following topics:

Measure a Distance

When measuring a distance, you can draw straight lines or free-form lines that are streight or curved. The two options are described separately below. You can combine the two options by starting with straight lines and switching to free-form curved lines, but once you switch to free-form line mode, you cannot switch back to straight lines.

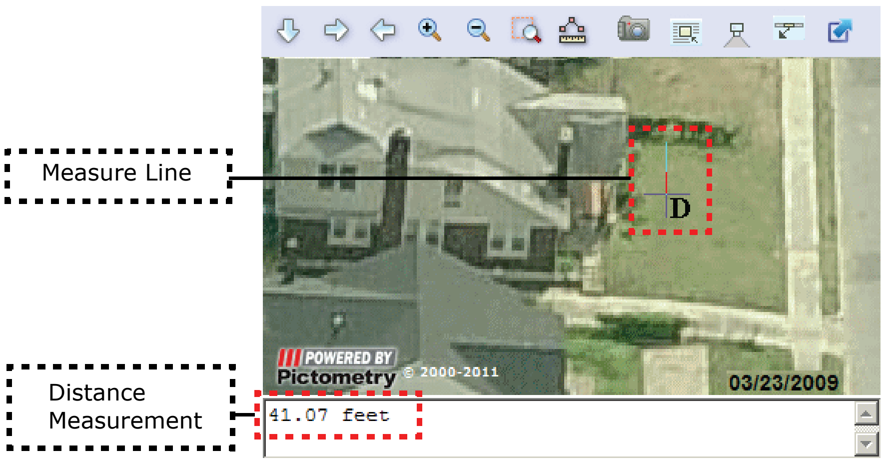
To measure a distance on the pictometry view:

1. After opening the pictometry view, on the top tools menu, click the Pan tool, and on the menu that displays, select the measure distance tool:



- To measure a straight line, click at any point on the pictometry view and, holding your mouse key down, drag the cursor indicator (a small black X) to the end-point of the distance you want to measure. As you drag across the view, a light blue line displays, indicating the line being measured.

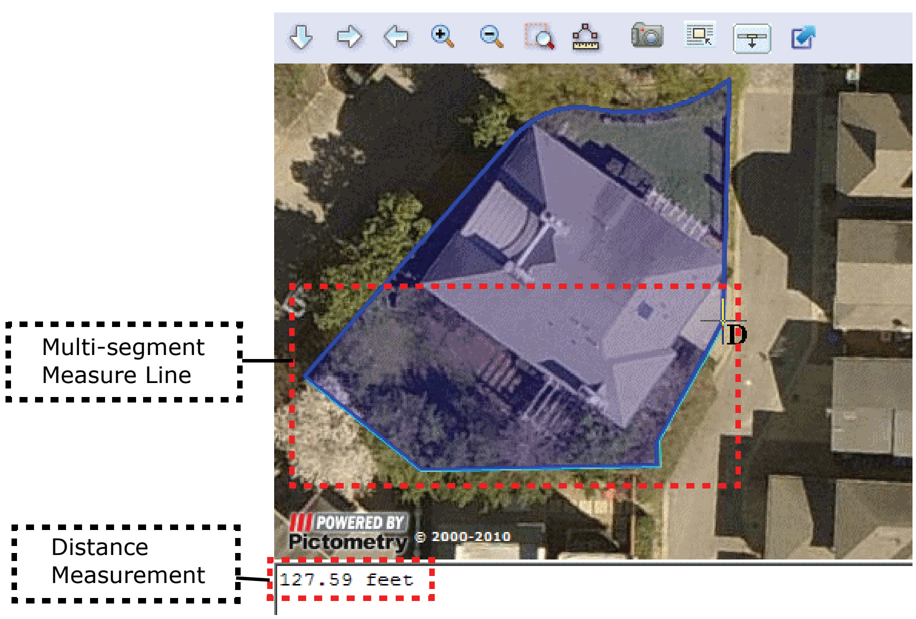
  When you reach the end point of the line you want to measure, release the mouse key. The distance measurement of the final line displays in the field at the bottom of the pictometry view, as shown:



- To measure a straight line with multiple segments, click at any point on the pictometry view, and, holding down your mouse key, drag the cursor indicator (a small black X) to the end of the first segment you want to measure.

  When your cursor indicator is over point at the end of the first segment you want to measure, press the V key on your keyboard. Continue holding down your mouse key and create any other segments as required by pressing the V key on your keyboard at each segment end.

  When you have completed drawing the last segment, release your mouse key. The distance measurement of the entire line (all segments) displays in the field at the bottom of the pictometry view, as shown:



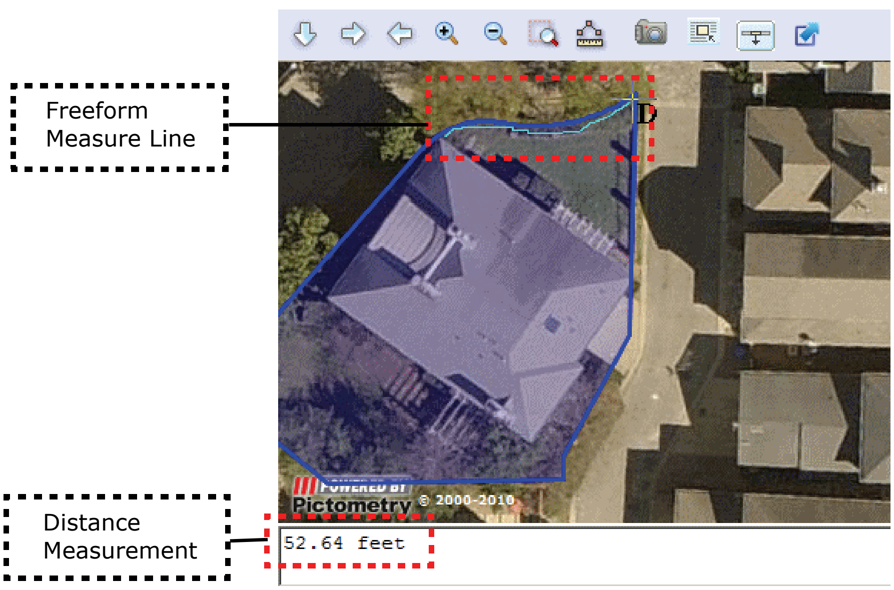
- To measure an interim distance, click at any point on the pictometry view and, holding down your mouse key, drag the cursor indicator (a small black X) to the end of the interim distance you want to measure. As you drag across the view, a light blue line displays, indicating the line being measured.

  When you reach the end point of the interim distance, press the SHIFT key on your keyboard. The distance measurement to the interim point displays in the field at the bottom of the pictometry view.

- To measure a free-form line with the distance tool, click at any point on the pictometry view, and then press the ALT key on your keyboard. The draw mode of the line is switched to free-form.

  Once in free-form mode, drag the cursor indicator (a small black X) along the line you want to measure. As you drag across the view, a light blue line displays, indicating the line being measured.

  When you release your mouse key the distance measurement of the final line displays in the field at the bottom of the pictometry view, as shown:

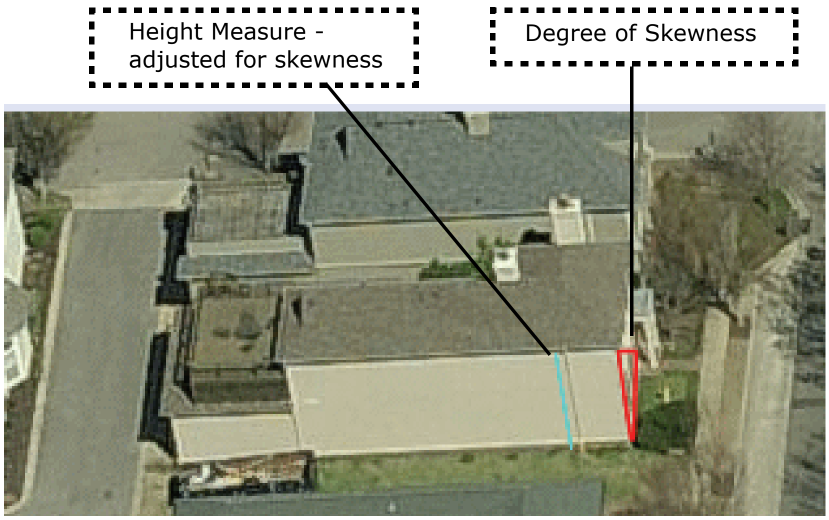


Measure a Height

When measuring a height, you are first identifying the plane on which the measurement will occur, and then identifying a distance on that plane. Because orthogonal images do not contain the perspective necessary to create height measurements, you can only use the height measurement tool while the pictometry view is displaying oblique images.

When you click on the pictometry view to start your height measurement, the point on which you click defines the vertical plane on which the measurement occurs. The line that displays on your view as you drag your cursor is being drawn on the vertical plane above the start point; in other words, while you see a line that is moving across the image space, the software calculates a line at X distance moving vertically.

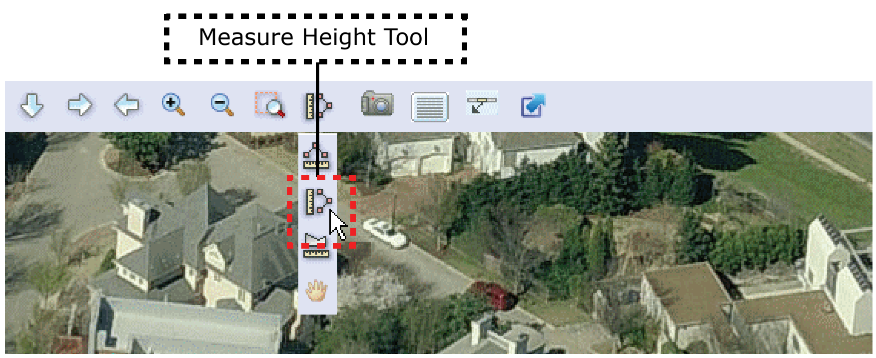
Because oblique images include some skewness (due to the angle at which they are taken), a true vertical may be to the right or left of a plumb line (plumb is when the line appears straight up/down on the pictometry view). When calculating heights, therefore, you may need to adjust the measurement line to the amount of skewness of the object you are measuring. For example, in the screen shot below, the house wall is displaying at approximately 3 degrees of skewness, and the measurement of the height of the wall must take this into account:



Note: Pictometry height measures can be highly accurate, but they are not a substitute for the precise measurements of the actual physical object, as would be created by a surveyor.

To measure a height on the pictometry view:

1. After opening the pictometry view, on the top tools menu, click the Pan tool, and on the menu that displays, select the measure height tool:

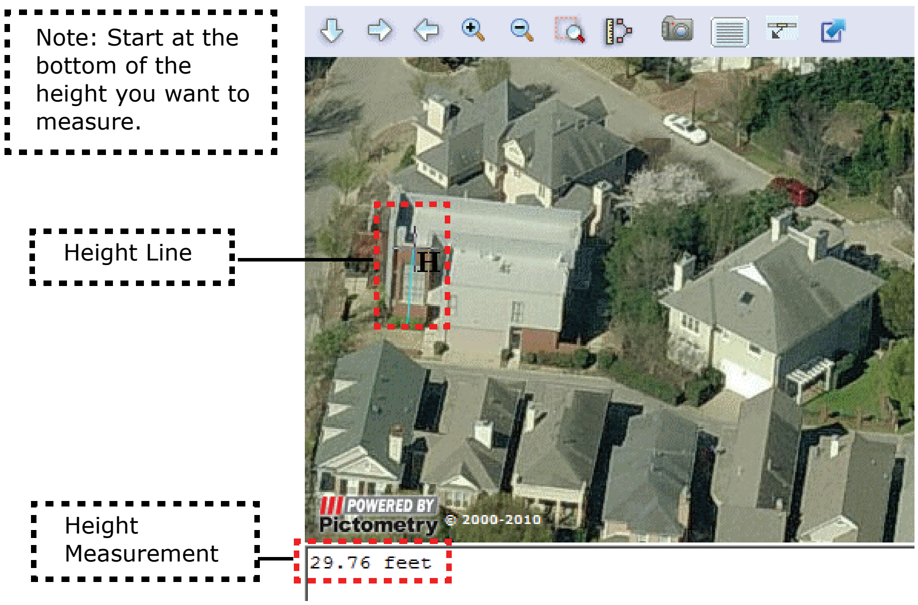


2. Measure a height as follows:

   a. Click on the pictometry view at the base of the height you want to measure.

b. Holding your mouse key down, drag the cursor indicator (a small black X) to the top of the height you want to measure. As you drag across the view, a light blue line displays, indicating the line being measured.

c. When you reach the end point of the height you want to measure, release the mouse key. The distance measurement of the final line displays in the field at the bottom of the pictometry view, as shown:

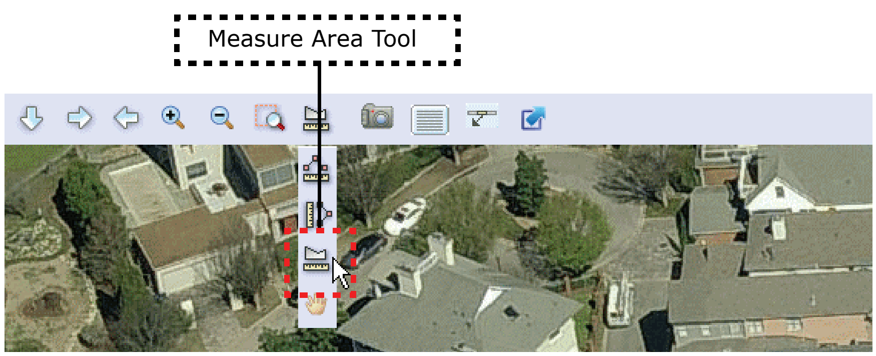


Measure an Area

When measuring an area, you must create a shape on the pictometry view that includes angled segments or curves. The two options are described separately below. You can combine the two options by starting with straight lines and switching to free-form curved lines, but once you switch to free-form line mode, you cannot switch back to straight lines.

To measure an area on the pictometry view:

1. After opening the pictometry view, on the top tools menu, click the Pan tool, and on the menu that displays, select the measure area tool:



2. Draw an area using straight line segments as follows:

a. Click on the pictometry view at the edge of the area you want to measure, and, holding down your mouse key, drag the cursor to the first corner point you need to define.

b. When your cursor is over the first corner point, press the V key on your keyboard. The line is 'anchored', and a new segment begins.

c. Continue holding down your mouse key and drag the line to the next corner point you want to define, and press the V key on your keyboard again, and continue until you have defined the outline of the area with as many corner points as required.

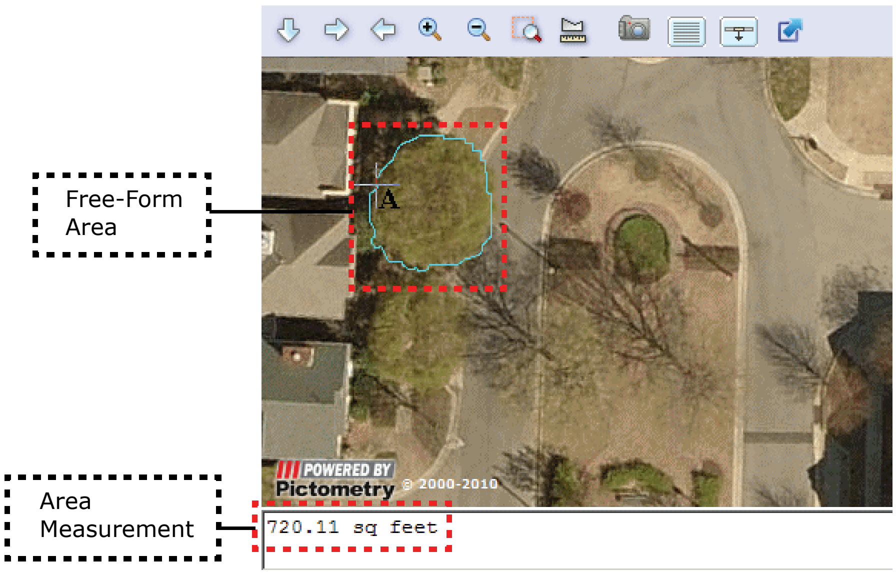
d. At the final point, release your mouse key. The final segment line is automatically created, joining the last corner point to the starting point, and the area measurement displays in the field at the bottom of the pictometry view, as shown:

5. Draw an area using a free-form outline with the following steps:

a. Click on the pictometry view at the edge of the area you want to measure, and, holding down your mouse key, press the ALT key on your keyboard. The measure area tool converts to a free-form drawing pen.

b. Drag the cursor around the edge of the area you want to measure. As you move your cursor across the pictometry view, a blue line appears, indicating the line you are drawing.

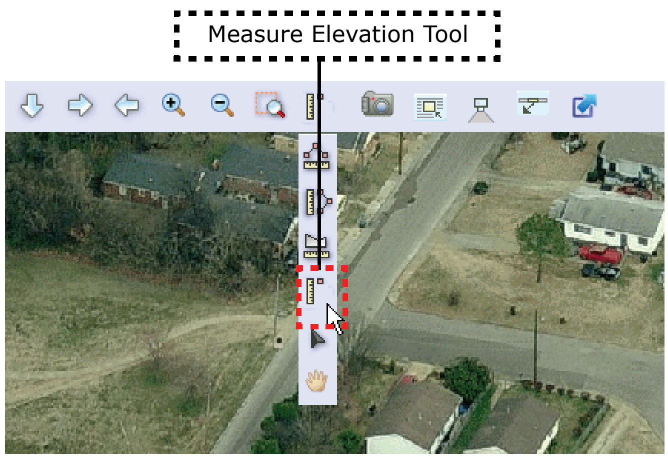
c. Continue holding down your mouse key until you have defined the outline of the area you want to measure, and release your mouse key. The final point of the cursor is automatically joined to the starting point, and the area measurement displays in the field at the bottom of the pictometry view, as shown:



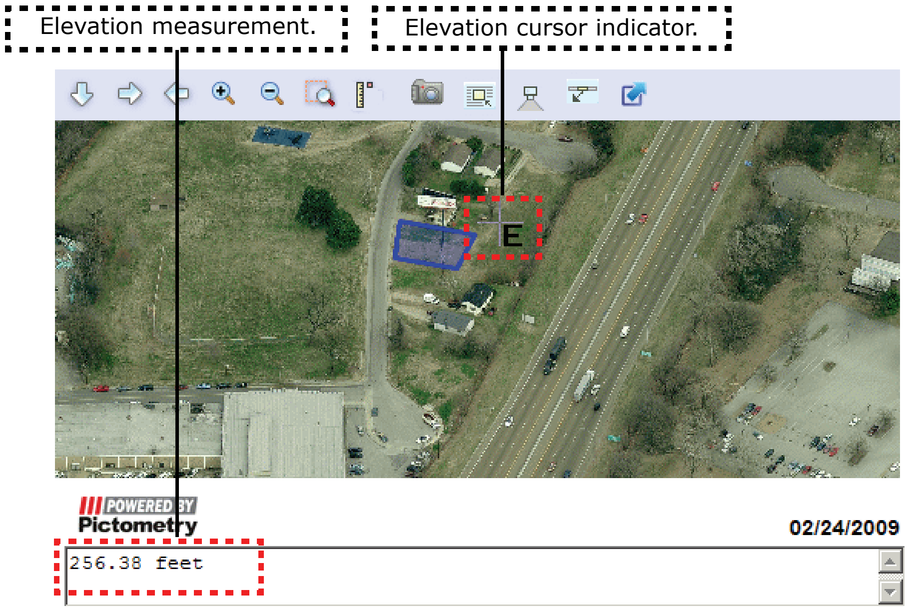
Measure an Elevation

The elevation option provides the elevation of the ground beneath any visible structures. Measure an elevation with the following steps:

1. After opening the pictometry view, on the top tools menu, click the tools option and select the measure elevation tool:



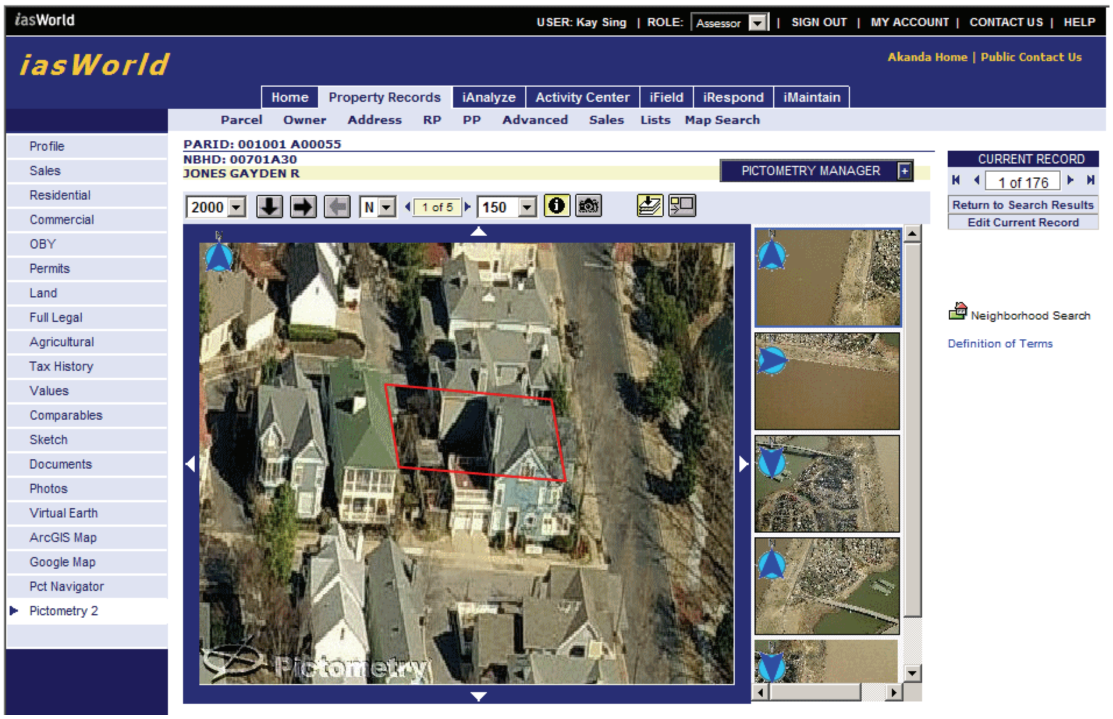
2. Click the point on the image that you want to obtain an elevation measurement for. The elevation displays in the field at the bottom of the pictometry view, as shown:



Using NIW Pictometry

The NIW Pictometry option is one version of pictometry available with iasWorld. If you do not see the pictometry details shown below, please refer to the previous section, Using POL Pictometry. NIW pictometry provides options to view the subject property record using pictometry images, along with options to navigate and view the area in which the property record is located, measure displayed items, and save any photo views of interest.

NIW Pictometry view, available on the search details menu



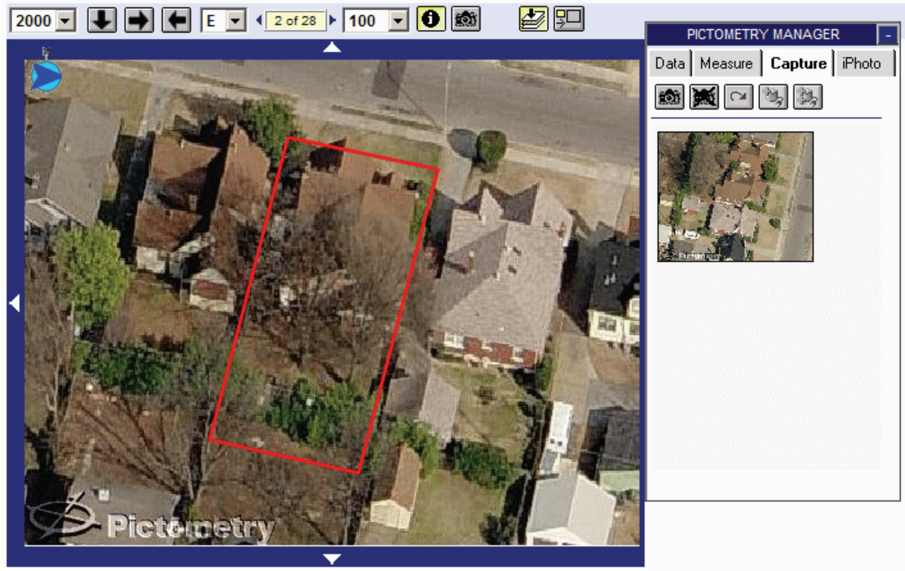
The pictometry view includes a thumbnails ribbon at the right of the main image area. You can click any of the thumbnails to display it in the main image area. Measure options are available as drop-down tools on the top menu of the main image area, along with view options that enable you to change the compass direction of the view, zoom in and out, and display or hide the parcel outline for the selected property record.

The pictometry view also provides a pictometry manager. This pictometry manager provides the following options:

- Data: Provides customized details about the subject property record, which may include items such as ownership and values history along with a sketch.
- Measure: Provides details of measurements taken in the main image area.
- Capture: Shows any captured images of the contents of the main image area. You can use this option to create, store, download, or delete captured images of the contents of the main image area.

- iPhoto: Shows any available photos for the subject property record.

Pictometry Manager, Capture Page Active



This section includes the following topics:

Pictometry View Navigation Options

Pictometry View Parcel Options

Capturing and Using the Active Contents of the Main View

Viewing Data Details in the Pictometry Manager

Pictometry Measurement Options

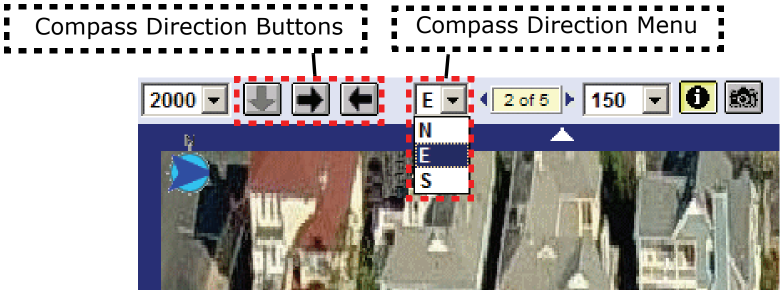
Pictometry View Navigation Options

The Pictometry view provides various navigation options that enable you to locate an area of interest, change the zoom level, and change the compass direction of the view. You can also use the thumbnails at the right of the main view area to select the contents of the main view area. To assist in reviewing pictometry details, you can also optionally expand the main view area.

To view a subject property record in the pictometry interface:

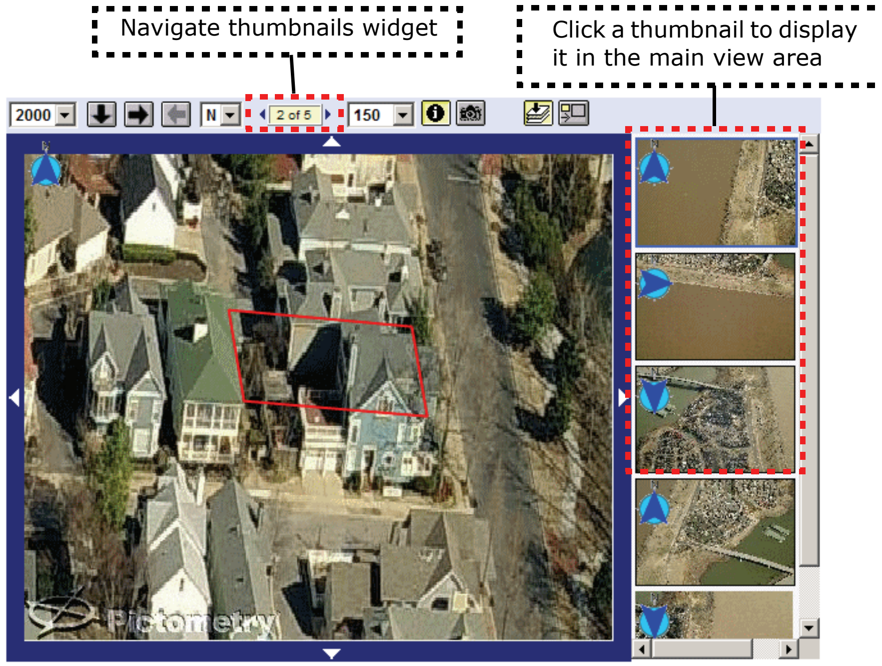
1. After completing a search, click the property record of interest. Details of the selected property record display on the Profile details page.
2. At the left of the page, in the details menu, click the Pictometry option. The pictometry view displays.

- To change the compass direction of the view of the subject property record, click the direction arrow you want to view the property record from, or, click the compass direction drop-down field, and select the compass direction you want to view the property record from:

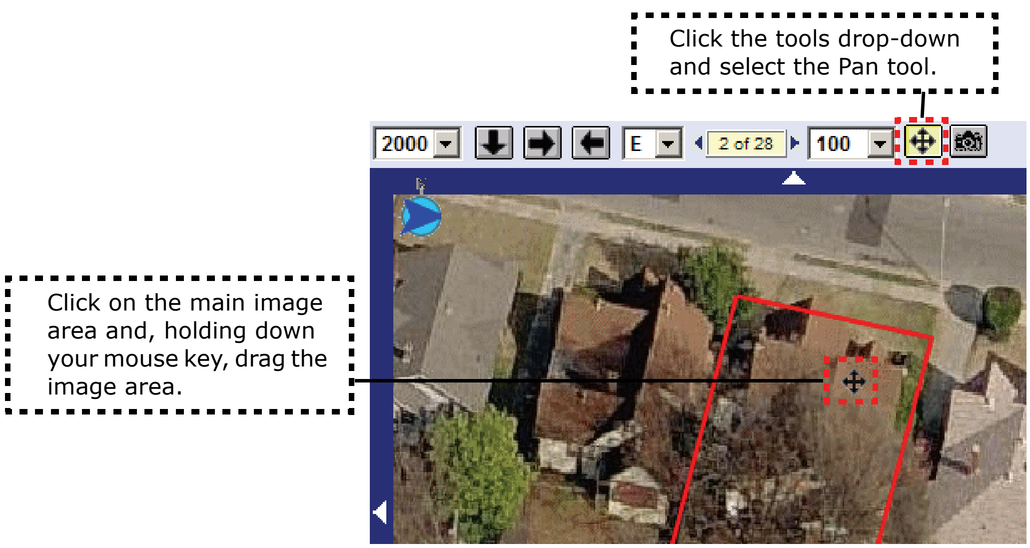


- To change the zoom level of the view of the property record, click the zoom level drop-down field, and select the zoom you want to view the image at. The zoom levels represent the radius of the view, in feet.

- To move from one thumbnail to another, either click the thumbnail of interest in the ribbon at the right of the main view area, or click the previous or next button in the navigation widget in the top menu of the main view area:



- The pan tool enables you to click on the main image area and drag the contents of the image area in any desired direction. As you drag the image area, hidden content is displayed. To use the pan tool, click the tools drop-down menu button and select the Pan tool. Then, with the pan tool selected, click on the main image area and, holding down your mouse key, drag the image in the desired direction:

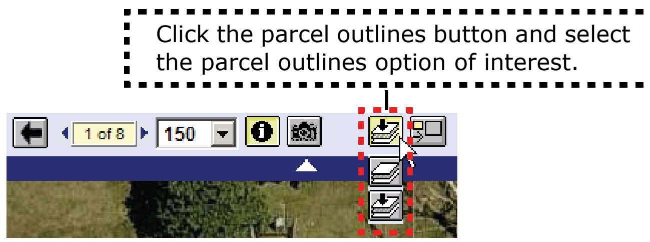


- To expand the area of the main image area, click the image size button on the top menu of the main view area. To shrink the main view area back to standard size, click the image size button again:

Pictometry View Parcel Options

The Pictometry view includes two options to provide more or less information about parcels. These options allow you to dsplay or hide parcel outlines, and view additional details about a parcel.

The view/hide parcel options are available in a drop-down menu on the top menu bar of the main view area. This menu provides the two parcel outline options; view no outline, or view the outline of the selected parcel. To select either of these options, click the parcel outlines button, and select the option of interest:

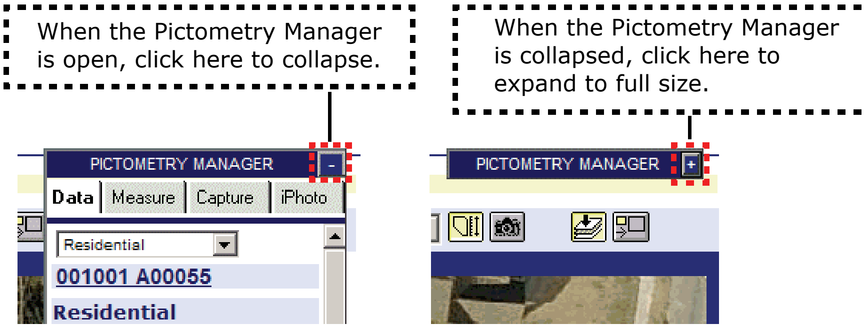


Note: Not all organizations provide details for other parcels on the pictometry view; if you do not see additional parcel outlines, they are not configured.

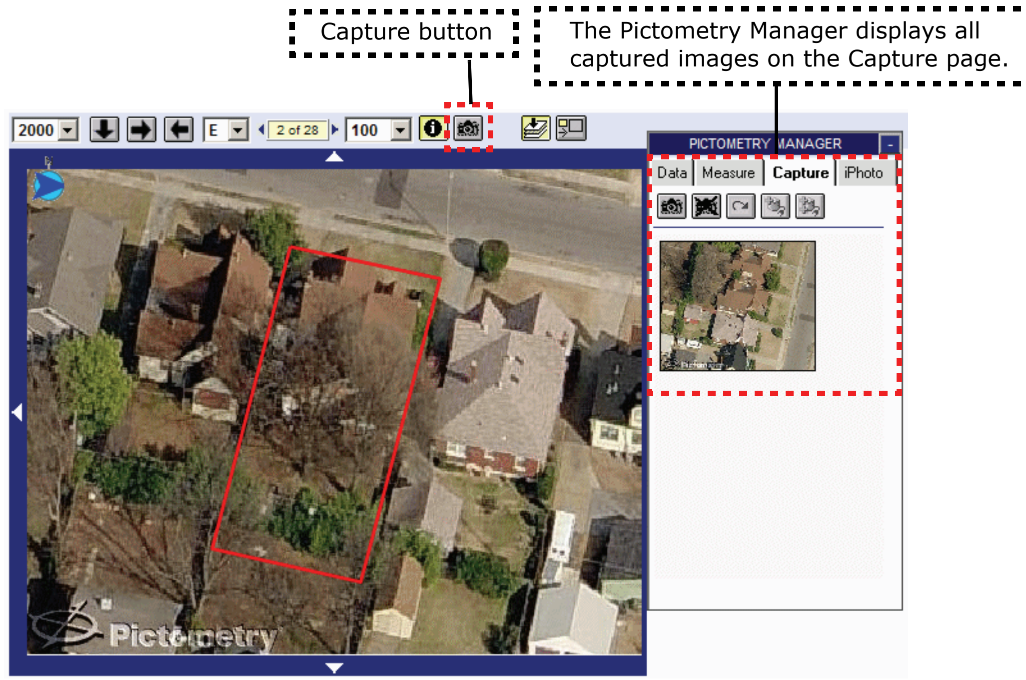
Capturing and Using the Active Contents of the Main View

After changing the contents of the main view area using the navigation and zoom options, you can capture the contents that display, and then store or download what you have captured. When you store the captured image, it becomes available for all users who have access to the property record.

The Pictometry Manager can be minimized or expanded. If you need to collapse the Pictometry Manager, click the minimize button at the top right of the panel. If you need to expand the collapsed panel, click the maximize button at the top right of the collapsed head-bar:

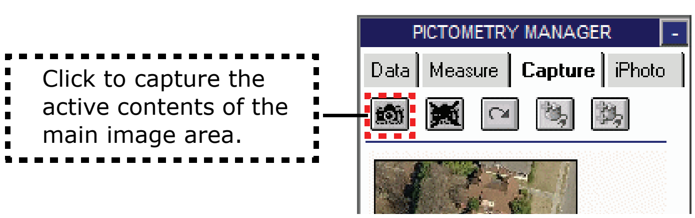


To capture the visible content of the main image area, click the capture button on the top menu. The Pictometry Manager displays the image on the Capture page:

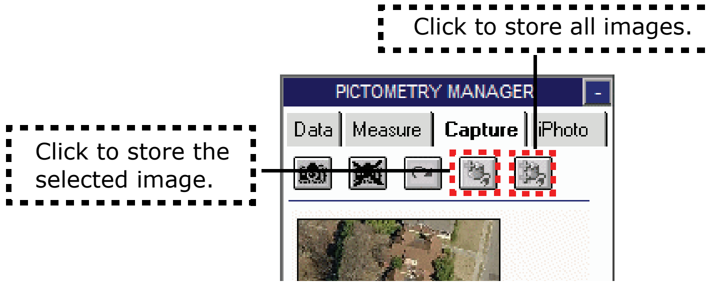


After capturing an image, you can optionally store it in the iPhoto (where it is available to other users), download it, or delete it.

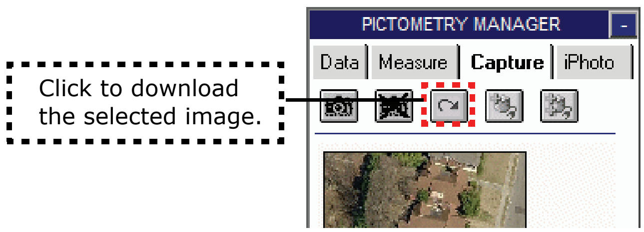
- **Capture an Image Using the Pictometry Manager**: When the Pictometry Manager is open, you can capture additional images as required. To capture an image using the Pictometry Manager, display the Capture page and click the capture button:



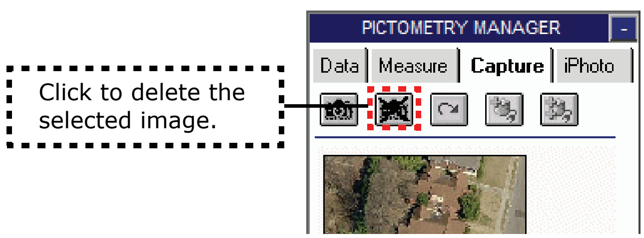
- **Store an Image**: After capturing an image, you can load it into iPhoto. To store an image, click the Load Image into iPhoto button, or click the Load All Images into iPhoto button:



- **Download an Image**: After capturing an image, you can download it to the location of your choice. To download an image, select the image and click the Download button. Note, the image type is .jpg, and the application you have associated with images of this type will be used to display it when you click the Download button:



- **Delete an Image**: All images you have captured during your current session (since you logged into iasWorld) are displayed on the Capture page. If required, you can delete any of these images. To delete an image, select the image and click the Delete button:

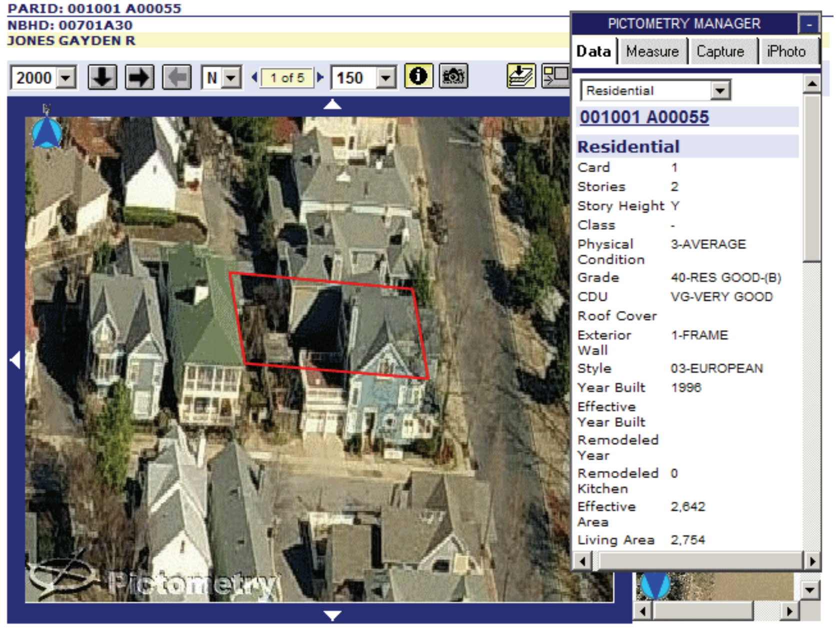


Viewing Data Details in the Pictometry Manager

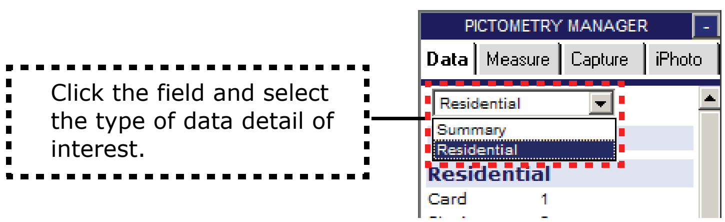
The pictometry manager provides a Data page, which presents more comprehensive details about the selected property record. The details that display are created by your iasWorld administrator, so they are unique to your organization. This data page shows details of the active property record, but you can also view details of other parcels using the Info tool.

Note: Not all organizations provide details for other parcels on the pictometry view; if you do not see additional parcel outlines, they are not configured.

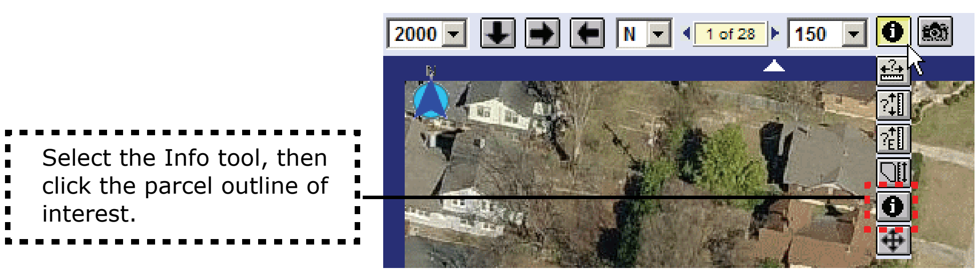
When you first open the Pictometry Manager, the Data tab is active.



To change the type of detail displaying on the Data page, click the drop-down field at the top, and select the type of detail of interest:



To view data details for another parcel on the pictometry view, click the Info button (located on the top menu of the main image area), and click the outline of interest:



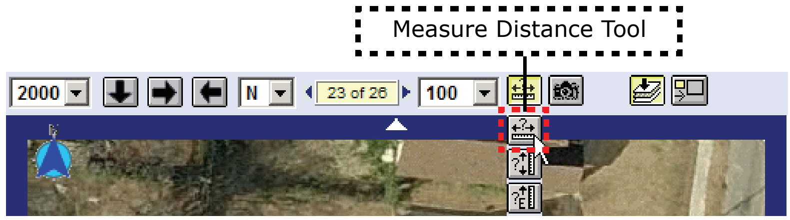
Pictometry Measurement Options

The pictometry feature provides multiple measurement options, which enable you to measure distances, heights, elevations, and retrieve the existing parcel measurements. All measurement options are located on the tools drop-down menu option. When you use any of the measurement tools, the results display on the

Measure page in the Pictometry Manager. Note, two measurement options described in this section, Measure Height and Measure Elevation, are only available with NIW version 2.

To measure a distance on the pictometry view:

1. After opening the pictometry view, on the top tools menu, click the tools option and select the measure distance tool:

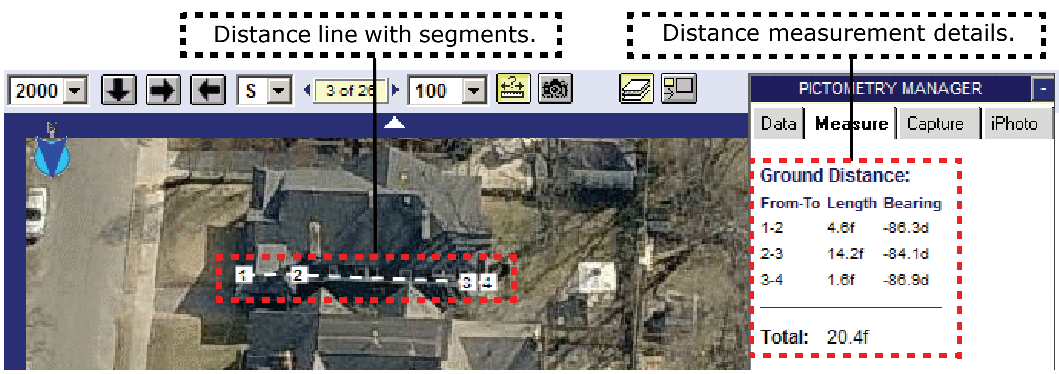


a. Click once on the pictometry view at the start of the distance you want to measure.

b. Move your cursor to the end of the distance you want to measure. As you move your cursor, a white dashed line appears.

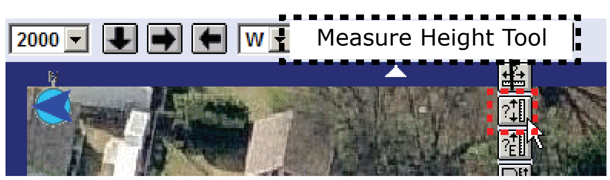
c. If you want to measure a distance in several segments, click again on the pictometry view at the end of each segment you want to measure.

d. At the end of the distance you want to measure, double-click on the pictometry view. The distance of each segment, and the entire length of the line, display on the Measure page in the Pictometry Manager:



To measure a height on the pictometry view:

1. After opening the pictometry view, on the top tools menu, click the tools option and select the measure height tool:



Note: The height measure tool is only available with NIW version 2. If you do not see this option, your system may be using NIW version 1.

a. Click once on the pictometry view at the bottom of the height you want to measure.

b. Move your cursor to the end of the height you want to measure. As you move your cursor, a white dashed line appears.

c. If you want to measure a height in several segments, click again on the pictometry view at the end of each segment you want to measure.

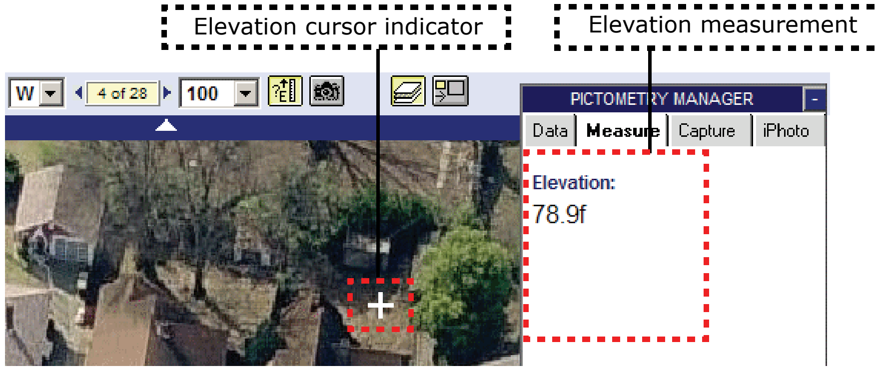
d. At the top of the height you want to measure, double-click on the pictometry view. The height of each segment, and the entire length of the line, display on the Measure page in the Pictometry Manager:

To measure an elevation on the pictometry view:

1. After opening the pictometry view, on the top tools menu, click the tools option and select the measure elevation tool:

Note: The elevation measure tool is only available with NIW version 2. If you do not see this option, your system may be using NIW version 1.

2. Click the point on the image for which you want to obtain an elevation measurement. The elevation of the selected point displays on the Measure page of the Pictometry Manager:



8 Using Lists

Lists can support consistency in the property assessment process, enabling you to quickly retrieve the same set of iasWorld property records to work with each time you need them, and to share the same property records with other users. Using the Property Records feature, you can locate property records for a list using any of the pre-determined data criteria, designed specifically to meet assessment industry requirements. Some of the many data criteria you can use include legal address, land use code, tax district, and sales value history.

Lists are built using property record IDs, and each time you retrieve the list the most recent details about each property record is retrieved. This means that, as the stored data values change, the list continues to provide the current values - so you are always working with accurate, up-to-date information.

You can also use the map feature to select property records for a list by geographic area, or by proximity to a selected property record or property records. Map overlays enable you to review property records in relation to geographic features such as water bodies and elevations. When you select property records for a list with the map feature, you can systematically explore the variances in property values by location, and create lists that help you evaluate this slightly intangible factor.

When creating a list, you start by selecting property records from the results of one search. Subsequently, you can append additional property records from the results of other searches, until you have the entire group of property records that you want to use in your list. You can also import property ID's from a .txt file, and append those property records to a list. Each list is also associated with a list category, and is assigned several attributes automatically, including a unique list id, a date stamp indicating when it was created, and an owner name (your login name).

A list can be private, or shared. Private lists are only visible to you, while shared lists are visible to the other users or user roles you select when you share the list. A list owner is the only one who can unshare a list, update its property records, or delete it. When you create a copy of a shared list, you become its owner, and you can then update or delete it as required.

In organizations that include multiple jurisdictions, your access to data may be restricted to particular jurisdictions. These jurisdiction restrictions are created for users

- different users have access to different jurisdictions. When you create a list, your property record selections are all identified with particular jurisdictions - the jurisdictions you have permission to use.

When you share a list with other users, it is possible that they do not have access to some of the jurisdictions you have access to. Any property records in a list associated with jurisdictions that other users do not have permission to use disappear from a list you have created when those users view it. However, the property records are not deleted from the list - and they will display for users with permission to use the jurisdiction.

For details about using the features described in this introduction, see the following topics:

Creating a New List with a Property Record Search

Selecting Property Records for a List from Search Results

Creating a Neighborhood Sales List

Buffer Search a New List

Creating a New List from Selections on a Map

Removing Property Records from a List

Appending Property Records to a List

Copying an Existing List

Sharing and Unsharing a List

Changing List Properties

Exporting a List

Importing a List

Deleting a List

Creating a New List with a Property Record Search

A new list can be created from the results of a property record search using data details, or using the map display search option. The data details search is the most powerful and flexible option for selecting property records by particular attributes: you can use the details stored in the iasWorld database to locate property records to include on a list. For example, if your iasWorld database includes school district or grade as an attribute, you can use either attribute to select property records for your list.

The group of property records you find with a search display in a results table, which includes details such as address, property ID and owner name. You can go through the results table and select property records individually for your list. Property records can also be selected for a list recursively; you can search for property records with one attribute and use them as the basis of a list, then search for more property records with another attribute, and append the results of the second search to the list you have already created. You can also use the Import feature to append additional property records to a list. For details, see Importing a List.

For complete details about using the Property Record search feature, see Text Search for Property Records.

Selecting Property Records for a List from Search Results

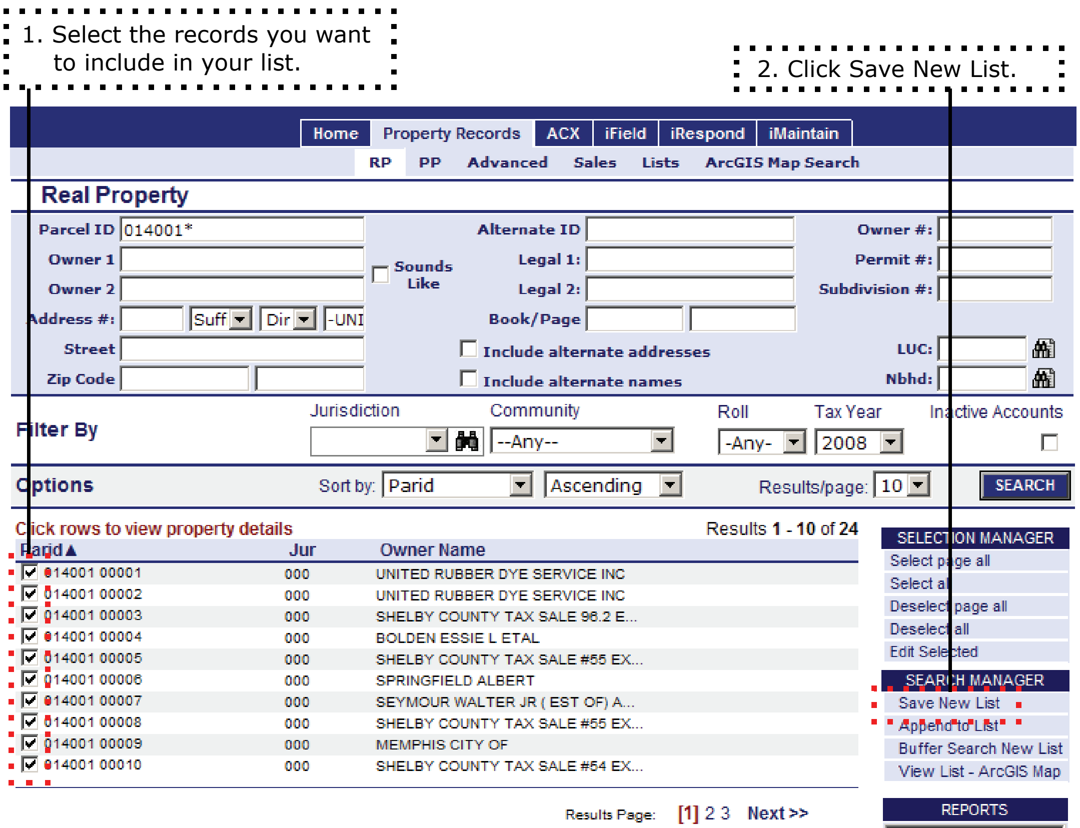
After you have located a property record or property records with the Property Records options, there are three ways you can use the results to create a list. The simplest option is to manually choose individual property records on the results list for a new list. The second option is to conduct a neighborhood search (which locates the property sales in the same area as any selected property record(s) in the results list). For details, see Creating a Neighborhood Sales List. The third option is to conduct a buffer search (which locates all property records within a specified distance of any selected property record(s) in the results list). For details, see Buffer Search a New List.

To select property records for a list from the results table:

1. In search results table, enable the select box beside each property record you want to include in your list. When selected, a check mark displays.

Note: You can use the Selection Manager options at the right of the results table to select all property records on a page, or all property records in the results table.

2. In the Search Manager options at the right of the results table, click Save New List. The Save New List pane displays.



3. Click the Name box, and enter a name for your new list.

4. In the Select Type pull-down list, select the type of list you want to create. When selected the type name displays.

Note: Types are created by your administrator for your organization. If you need details about any available types, please contact your iasWorld administrator.

5. Select a category for your new list. When selected, the category name displays.

Note: Categories are created by your administrator for your organization. If you need details about any available categories, please contact your iasWorld administrator.

6. Click Save. You new list is saved, and displays throughout iasWorld.

Creating a Neighborhood Sales List

The neighborhood sales search option is a very specialized search that enables you to locate property sales in an area. Because a neighborhood is quite large in some instances, this option is useful if you need to start with a broad search that you can subsequently refine and save in a list. You can select property records individually in the search results table for a new list after locating all sales that might be of interest to you.

Only property records with a sales record in a pre-determined time period (typically 18 months from the current date) are available for this search. Neighborhood sales searching is available in the search results list, on the Details page, and on the map display, depending on what your administrator has configured for your organization and/or the role you are using.

1. In the results table, select the property record(s) you want to use as the basis of your neighborhood search.
2. In results table, click the Neighborhood search icon: . The neighborhood search page displays details of the selected property record.
3. If required, select a value in any available filters to narrow the search results. Only property records with the values selected in filters display in your search results.
4. Click SEARCH. Any property records that match your search criteria and filter selections display in the search results table.

- OR -

1. Display a property record on any of the details pages, and, at the right of the page, click the Neighborhood link. The neighborhood search page displays details of the selected property record.
2. If required, select a value in any available filters to narrow the search results. Only property records with the values selected in filters display in your search results.
3. Click SEARCH. Any property records that match your search criteria and filter selections display in the search results table.

To use the property records you have located in a new list:

1. In the neighborhood search results table, enable the select box beside each property record you want to include in your list. When selected, a check mark displays.

   Note: You can use the Selection Manager options at the right of the results table to select all property records on a page, or all property records in the results table.

2. In the Search Manager options at the right of the results table, click Save New List. The Save New List pane displays.

3. Click the Name box, and enter a name for your new list.
4. Select a category for your new list. This category displays throughout iasWorld to identify the list, and can be used to sort the list in any list tables.
5. Click Save. Your new list is saved, and displays throughout iasWorld.

Buffer Search a New List

The Buffer Search New List option is a quick and convenient option for creating a new list. It enables you to select a property record, or several property records, enter a buffer distance, and send the results directly to a list. This feature is particularly helpful if you want to locate all property records in a geographic area that could be comparable with a target property record or property records.

The buffer search new list is an option that your administrator can make available in the Search Manager, which can be included on the Search Results page, the details pages, or the Map display page.

To use the buffer option to create a list:

1. In the results table, enable the select box beside each property record you want to use as the basis of a buffer list. When selected, a check mark displays.

- OR -

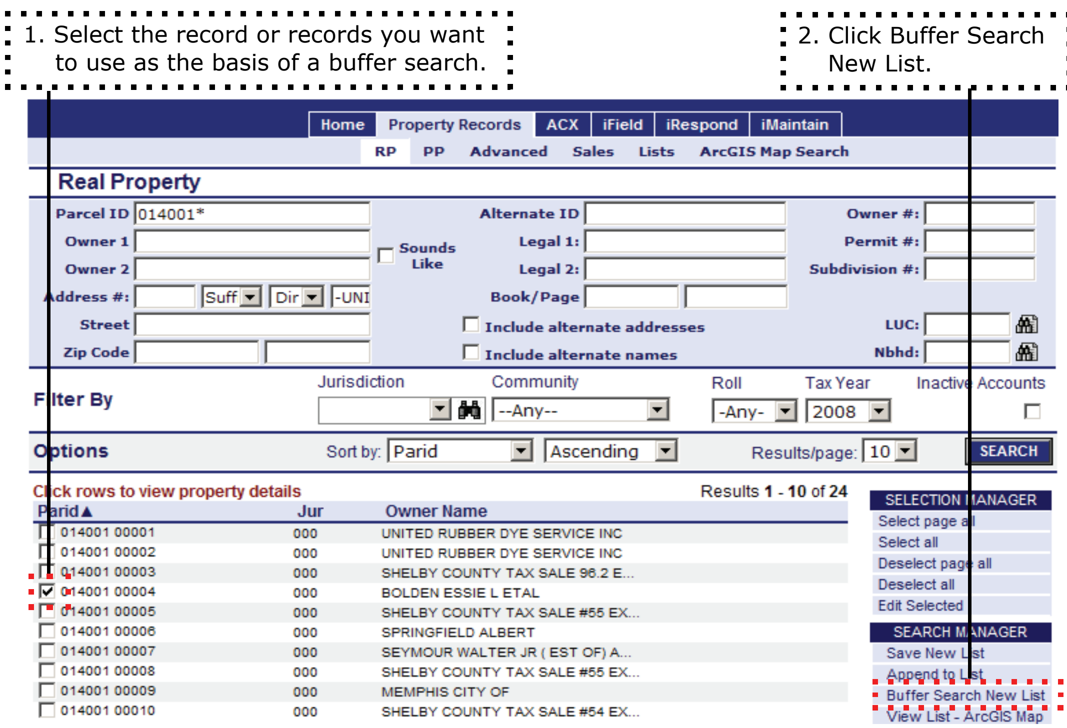
1. In the results table, click the property record you want to use as the basis of a buffer search. The selected property record displays on the profile details page.

- OR -

1. On the map display, select the property record or property records you want to use as the basis of a buffer search.

- THEN -

2. At the right of the page, in the Search Manager box, click Buffer Search New List. The Buffer Search New List pane displays.



3. As required, for the Include currently selected record(s) in list options, select Yes or No. When selected, the option radio button displays a dark centre.
4. From the Category pull-down list, select the category you wish to use for your new list. When selected, the category name displays.

Note: Categories are created by your administrator for your organization. If you need details about any available categories, please contact your iasWorld administrator.

5. In the Save New List field, enter the name you want to use for your new list.
6. In the Buffer Search Distance field, enter the buffer distance from the selected property record(s) you want to use to select property records for your new list.
7. Click SEARCH. All property records within the buffer distance from your selected property record(s) are selected and saved in your new list.

Creating a New List from Selections on a Map

The map feature enables you to select property records for a list visually, by choosing them on a map display, or in a buffer zone. The map selection option is a standard feature, while the buffer select option is a custom feature that may be available in your organization.

This section includes the following details:

- **Saving Map Selections in a New List, or Appending them to an Existing List**: After selecting property records on the Map Display, you can use them to create a new list, or append them to an existing list. For details, see Saving Map Selections in a New List, or Appending them to an Existing List.
- **Using the Buffer Selection Feature**: After selecting one or several property records on the map display, the buffer selection feature enables you to enter a proximity measurement and select all property records that are within that proximity to the selected property record(s), and save the results directly to a new list. For details, see Creating a List with the Buffer Feature.
- **Selecting Property Records in the Map Search Results List**: After selecting property records with the Map Display, you can view them in a search results table, and select them to create a new list, or append them to an existing list. For details, see Selecting Property Records in the Map Search Results List.

Locating and Selecting Property Records on the Map Display

When the Map Search page first opens, the map that displays is at the highest level available. Map display options that you can use to locate a property record include:

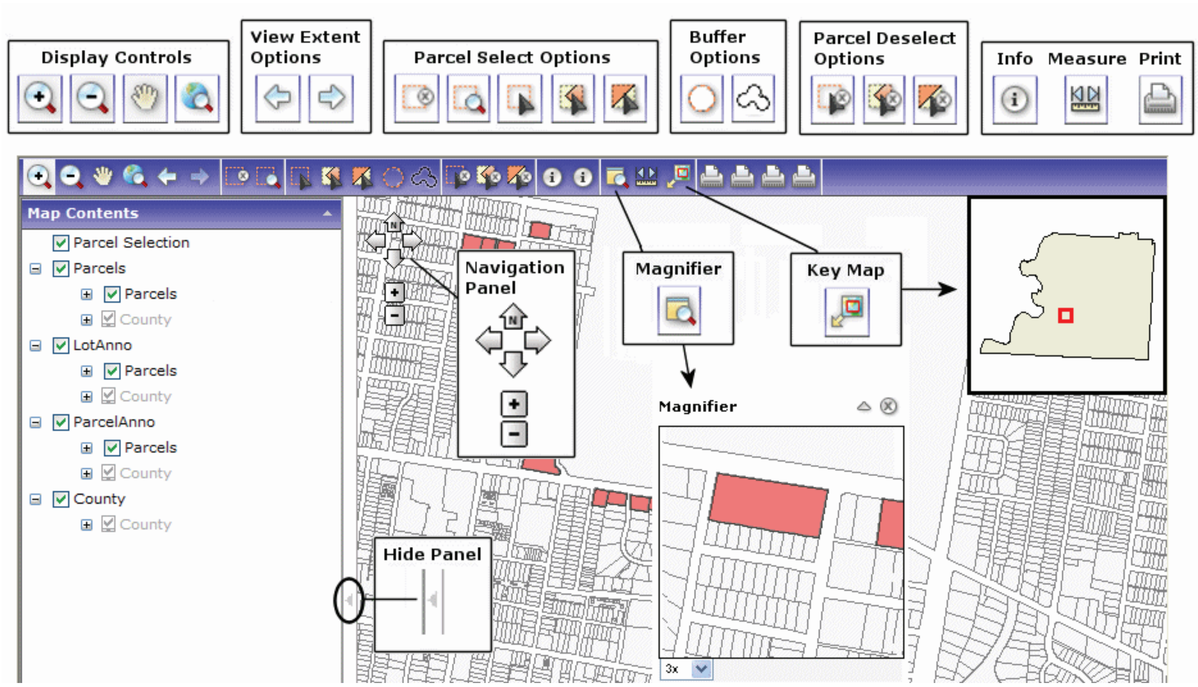
- **Zoom Options**: There are several options available on the map display that you can use to zoom in or zoom out:
  - The **Zoom In** tool enables you to draw the area you want to zoom in on. After the area is drawn, the map re-displays only the selected area.
  - The **Zoom to Selected** tool enables you to zoom in to any selected property records. If you have selected several property records, the area that displays is scaled to display all selected property records.
  - The **Overview panel** includes a red visible box. You can click the bottom right corner of this red box and resize the main map area - to either zoom in, or zoom out.
  - If you are using a mouse with a wheel, the wheel will zoom in or out, at the scale set for your computer mouse configuration.
  - The **Zoom Out** tool enables you to click on the map display and zoom out by a predetermined percentage (for example, 50%).
- **Magnify Box**: The magnify box is a special feature, developed for iasWorld customers, that enables you to position a small window on the main map, and have

this area magnified. The magnify box can be moved around the map display, as needed, to highlight different areas. The magnify box provides different zoom scales - from 2x to 10x, which you can select and change as needed.

- **Map Navigation**: The Overview panel displays at the right of the map, with a view magnification of approximately 20% of the main map. The red visible box indicates the section of the map that is visible on the main map. You can click and drag the red visible box to any other area in the Overview panel, to view that area on the main map. The pan tool converts the pointer into a drag-and-move tool. You can use the pan tool to drag the contents of the main map around, to reveal sections that are currently hidden.
- **Display Details**: The Map Contents panel provides layers options, which enable you to add additional details to the map display, such as sub-division lines and parcel ID numbers. The layers that are available depend on your organization and the choices of your administrator. You can also move or hide the Overview and Map Contents panels.
- **Selected Parcel ID Listing**: This list box displays the Parcel ID's of all property records selected on the map display.
- **Selection/Deselection Tools**: The selection tools enable you draw areas, shapes or lines on the map display to select property records. The deselection tools enable you to draw areas, shapes or lines on the map display to deselect property records.

Note: Jurisdiction data restrictions are applied to the map display. If you do not have access to property records in a jurisdiction, you will see the property record outlines on the map, but will be unable to select or use them in any way.

The following illustration shows the features described above:



Note: For complete details about using the map display to select property records, see Map Search for Property Records.

Saving Map Selections in a New List, or Appending them to an Existing List

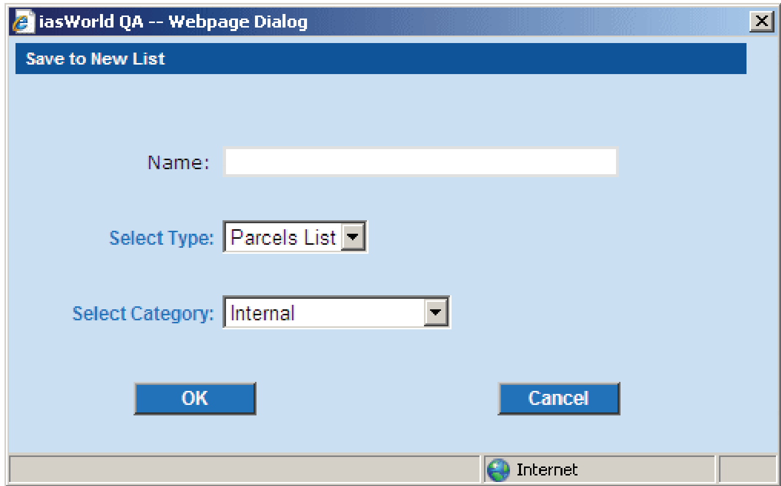
After making selections on the map display, you can use your selections to create a new list, or append them to an existing list. The Search Manager at the right of the main map display provides these options, if they have been enabled for you by your iasWorld administrator.

To save your property record selections on the map display to a new list, or append them to an existing list:

1. Select the property records on the map display that you want to save in a new list or append to an existing list.

2. Save your selections in a new list with the following steps:

   a. At the right of the main map display, in the Search Manager, click ‘Save New List’. The Save New List dialog box displays:



b. In the Name field, enter a name for your new list.

c. From the Select Type pull-down list, select the type of list you want to create. When selected, the type name displays.

Note: Types are created by your administrator for your organization. If you need details about any available types, please contact your iasWorld administrator.

d. From the Select Category pull-down list, select the category for the list you want to create. When selected, the category name displays.

Note: Categories are created by your administrator for your organization. If you need details about any available categories, please contact your iasWorld administrator.

e. Click OK. The new list is created.

3. Append your selections to an existing list with the following steps:

a. At the right of the main map display, in the Search Manager, click ‘Append to List’. The lists that you can append the selected property records to displays in the Lists dialog box.

b. Click the list to which you want to append the selected property records. The list name is highlighted.

c. Click Append. The selected property records are appended to the selected list.

Selecting Property Records in the Map Search Results List

You can view details of the property records selected in the map display in a search results table, and from this list, you can select individual property records to include in a new list. You can also use this option to select property records to append to an existing list.

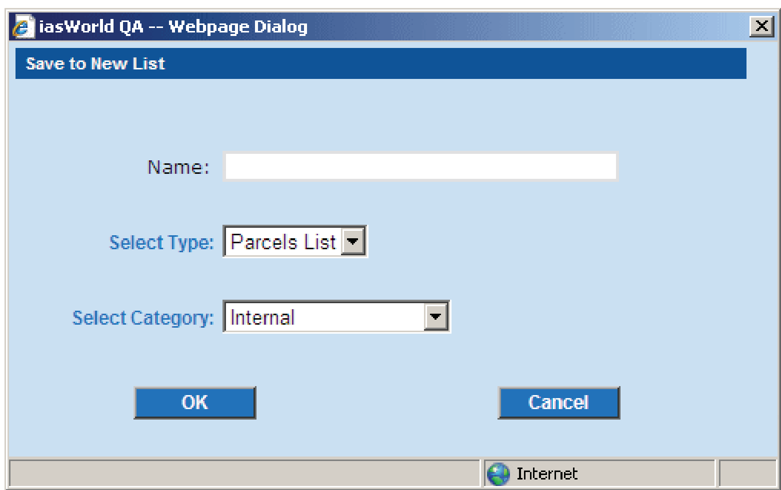
To view property records selected on the map display in a search results list, and select them for a new list or append them to an existing list:

1. Use the map options to locate and select the property records you want to use as the basis of your new list.
2. In the Search Manager options at the right of the map display, click View Current List. The current list table displays the selected property records.
3. At the right of each property record you want to save to a new list, or append to an existing list, enable the check box. When enabled, a check mark displays.

   Note: You can use the Selection Manager options at the right of the results table to select all property records on a page, or all property records in the results table.

4. Save your selections in a new list with the following steps:

   a. At the right of the main map display, in the Search Manager, click ‘Save New List’. The Save New List dialog box displays:



   b. In the Name field, enter a name for your new list.

   c. From the Select Type pull-down list, select the type of list you want to create. When selected, the type name displays.

   Note: Types are created by your administrator for your organization. If you need details about any available types, please contact your iasWorld administrator.

   d. From the Select Category pull-down list, select the category for the list you want to create. When selected, the category name displays.

   Note: Categories are created by your administrator for your organization. If you need details about any available categories, please contact your iasWorld administrator.

e. Click OK. The new list is created.

3. Append your selections to an existing list with the following steps:

   a. At the right of the main map display, in the Search Manager, click ‘Append to List’. The lists that you can append the selected property records to displays in the Lists dialog box.

   b. Click the list to which you want to append the selected property records. The list name is highlighted.

   c. Click Append. The selected property records are appended to the selected list.

Creating a List with the Buffer Feature

The Buffer feature enables you to select a group of property records for a list by their proximity to one or more property records you select on the map. You define the buffer zone in feet and inches or meters each time you use the Buffer Search option.

Note: This feature is an option that can be enabled by your system administrator. You may not see the buffer icon at the right of the map display or on the map tools menu at the top of the map.

To select property records for a list with a buffer search:

1. Use the map options to locate and select the property record(s) you want to use as the basis of your buffer list.
2. At the right of the map display, click the Buffer icon: . The Buffer Search page displays.
3. As required, for the Include currently selected record(s) in list options, select Yes or No. When selected, the option radio button displays a dark centre.
4. Click the Buffer Search Distance field, enter the distance from the selected property record(s) you want to use to select additional property records for your new list.
5. Click Search. All property records within the buffer distance you entered are selected, and display in a search results list.

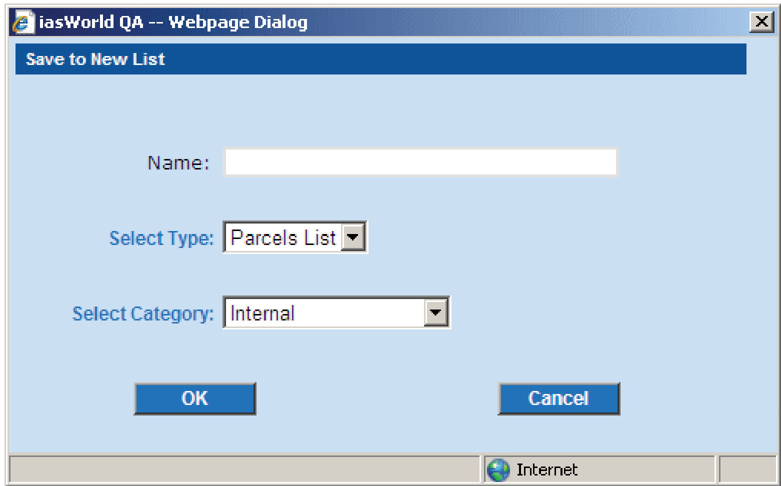
To use the property records you have located in a new list, or append them to an existing list:

1. In the buffer search results table, at the right of each property record you want to save to a new list, or append to an existing list, enable the check box. When enabled, a check mark displays.

   Note: You can use the Selection Manager options at the right of the results table to select all property records on a page, or all property records in the results table.

2. Save your selections in a new list with the following steps:

a. At the right of the main map display, in the Search Manager, click ‘Save New List’. The Save New List dialog box displays:



b. In the Name field, enter a name for your new list.

c. From the Select Type pull-down list, select the type of list you want to create. When selected, the type name displays.

Note: Types are created by your administrator for your organization. If you need details about any available types, please contact your iasWorld administrator.

d. From the Select Category pull-down list, select the category for the list you want to create. When selected, the category name displays.

Note: Categories are created by your administrator for your organization. If you need details about any available categories, please contact your iasWorld administrator.

e. Click OK. The new list is created.

3. Append your selections to an existing list with the following steps:

a. At the right of the main map display, in the Search Manager, click ‘Append to List’. The lists that you can append the selected property records to displays in the Lists dialog box.

b. Click the list to which you want to append the selected property records. The list name is highlighted.

c. Click Append. The selected property records are appended to the selected list.

Removing Property Records from a List

The Delete option removes a list permanently. You can only delete a list that you own.

To delete a list:

1. Select the list you want to delete, and click **Delete**. A dialog box displays, asking if you want to delete the selected list.

2. Click **OK**. The selected list is permanently deleted.

Appending Property Records to a List

The Append feature in the List Management options enables you to add additional property records to a list as required. Appended property records are sorted into an existing list, rather than being specially identified as appended. You can only append property records to a list which you own. If you want to append property records to a list that you do not own, you must make a copy first. For details, see Copying an Existing List.

To append new property records to a list:

1. Use the Property Records options or the map options to locate the additional property records you want to append to your list.
2. In the table of property records found by your category or map search, select each property record you want to append to your list. When selected, a check mark displays.

   Note: You can use the Selection Manager options at the right of the results table to select all property records on a page, or all property records in the results table.

3. In the Search Manager options at the right of the results table, click Append to List. The Append to List pane displays.
4. Click the list to which you want to append your selected property records. (Note, only lists you own display in this list.)
5. Click Append. The selected property records are added to the list, and the search page re-displays.

Copying an Existing List

The Copy option duplicates any existing list and its filters, and simultaneously transfers ownership of the list to you, if it is shared to you by another user. For details about changing attributes of a list as the list owner, see Sharing and Unsharing a List and Changing List Properties.

To copy a list:

1. Select the list you want to copy, and click Copy. The Copy List options display.

1. Enter a new name for the list, and click Copy. Your list copy is created, and displays in the lists table.

2. Click Cancel to re-display the list management options.

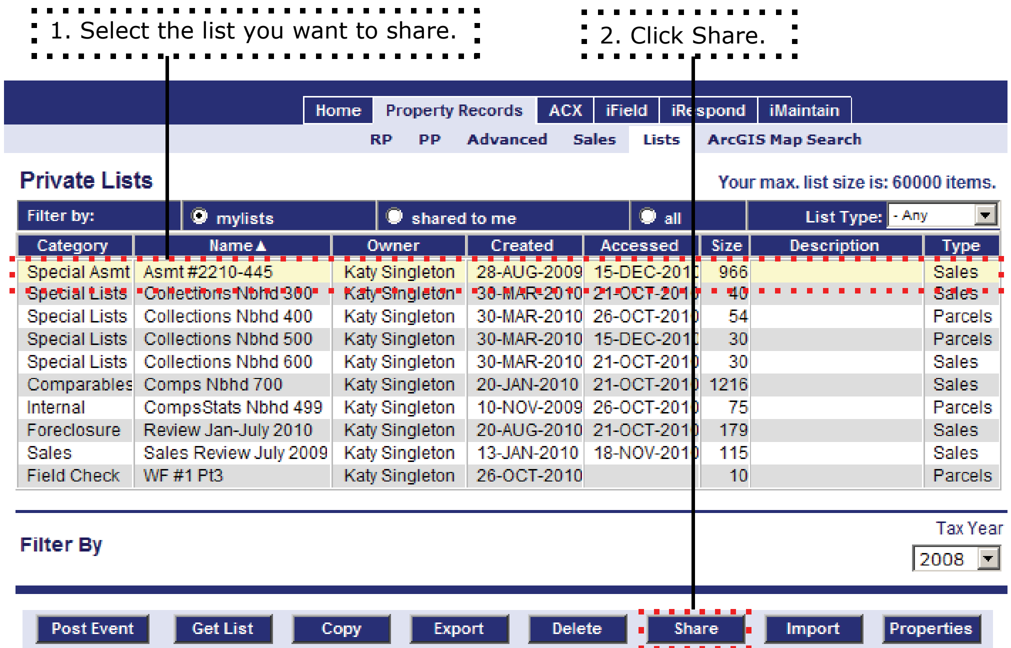
Sharing and Unsharing a List

As the owner of a list, you can share it with other iasWorld users. Other users cannot make changes to a list you have shared to them, but they may make a copy for their personal use. To unshare a shared list, you must remove all users allowed to share the list.

Note: For some organizations, data is organized into different jurisdictions. If you create a list that includes data in jurisdictions that other users do not have permission to use, the applicable property records will not display.

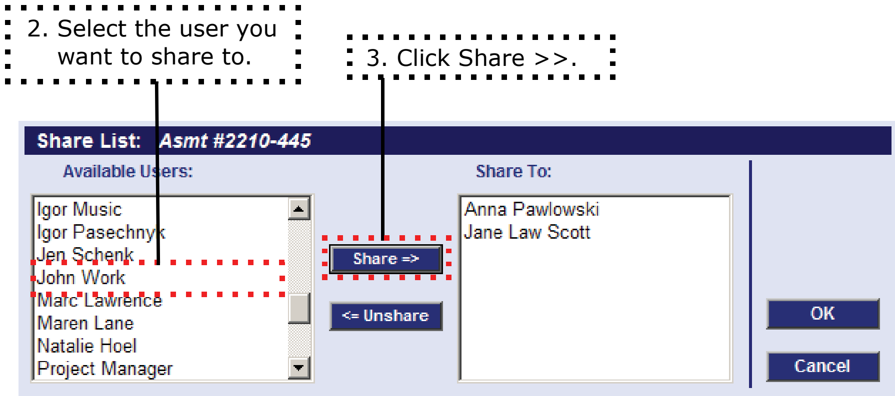
To share a list:

1. Select the list you want to share, and, at the bottom of the Lists table, click **Share**. The Share List options display.



2. In the list of available Users, select the user name with which you want to share the list. When selected, the name is highlighted. Note, you may only select one name at a time.

3. Click **Share =>**. The user is moved to the included list.



4. Repeat steps 2 and 3 as required.

5. Click **OK** to re-display the list management options.

To unshare a list:

1. Select the list you want to unshare, and click **Share =>**. The Share List options display.

2. In the list of shared to users, select the user name with whom the list is shared. When selected, the name is highlighted.

   Note: You may only select one name at a time.

3. Click **<= Unshare**. The user is moved to the available list.

4. Repeat steps 3 and 4 as required, until the shared to list is empty.

5. Click **OK** to re-display the list management options.

Changing List Properties

The List Properties option enables you to change the list name, list category selection, and to attach a text description to the list. Changes made in the list properties display throughout iasWorld, and display for all users and groups sharing the list. You may only change properties of lists you own. If you want to change the properties of a list that you do not own, you must make a copy first. For details, see Copying an Existing List.

To change list properties:

1. Select the list for which you want to change properties, and click Properties. The Properties options display.
2. Click the Name field and enter a new list name, as required.
3. Select a new list category, as required.
4. Click the Description field and enter a list description, as required.
5. Click Apply. Your list property changes are saved.
6. Click OK to re-display the list management options.

Exporting a List

The Export option creates a file listing of all property id's from the selected list. Only the key data elements for each record in a list (parcel ID or parcel ID and jurisdiction) are exported.

When you export a list, you can either open the resulting file, or save it to a specified location. If you have an export type associated with an application (for example, comma-delimited lists associated with Excel), the list will automatically open in the appropriate application.

To export a list:

1. Select the list you want to export, and click Export. The Export options display.
2. From the File Type pull-down list, select the format you want to export the list as. When selected, the format name displays.
3. Click a radio button to select the export contents you want. When selected, the radio button displays with a black centre.
4. Click Export. The File Download dialog box displays.
5. Make your selections, as required. The list is exported to the location you select.

Importing a List

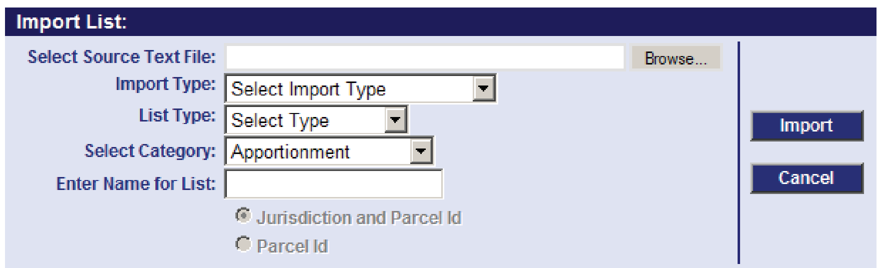
The Import List option retrieves property ID's (and optionally jurisdiction codes) from a file and either appends the property records to an existing list, or creates a new list that includes those property records. There are a selection of import file type options, including comma delimited and XML. If you need to confirm the structure or values that need to be present in an import file, simply export an existing list in the format you want to use and duplicate that format in the import file.

During import, the property ID's in the import file are checked against the property ID's in your iasWorld database. If no match is found, that property record is discarded - it will not be appended, or included in the new list.

To import a list:

1. On the Lists pane, click 

. The Import List options display.



Options for importing a list are as follows:

Map Tools	
Option	**Details**
Select Source Text	Enter the directory path and file name of the file you want to import, or click Browse to locate and select the file.
Import Type	Select the file format you want to import. When selected, the format type displays
List Type	Select the type of iasWorld list you want to append records to, or the type of iasWorld list you want to create. When selected, the list type name displays
Select Category	Select a Category for the imported list. When selected, the category name displays.
Enter Name for List	Either enter a name for a new list, or if you want to append the imported property records to an existing list, enter the name of the existing list. Note, you must own a list in order to append additional property records.

2. Click Import. The property ID's in the selected list are imported, and either added to a new list, or appended to the existing list you entered.
3. Any property ID's in the imported file that do not have a matching property ID in your iasWorld database are discarded.
4. Click OK to re-display the list management options.

Deleting a List

The Delete option removes a list permanently. You can only delete a list that you own.

To delete a list:

1. Select the list you want to delete, and click **Delete**. A dialog box displays, asking if you want to delete the selected list.

2. Click **OK**. The selected list is permanently deleted.

9 Index

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