KANSAS

Department of Revenue
Property Valuation Division



ORION LIST MANAGER

GUIDE

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LIST MANAGER

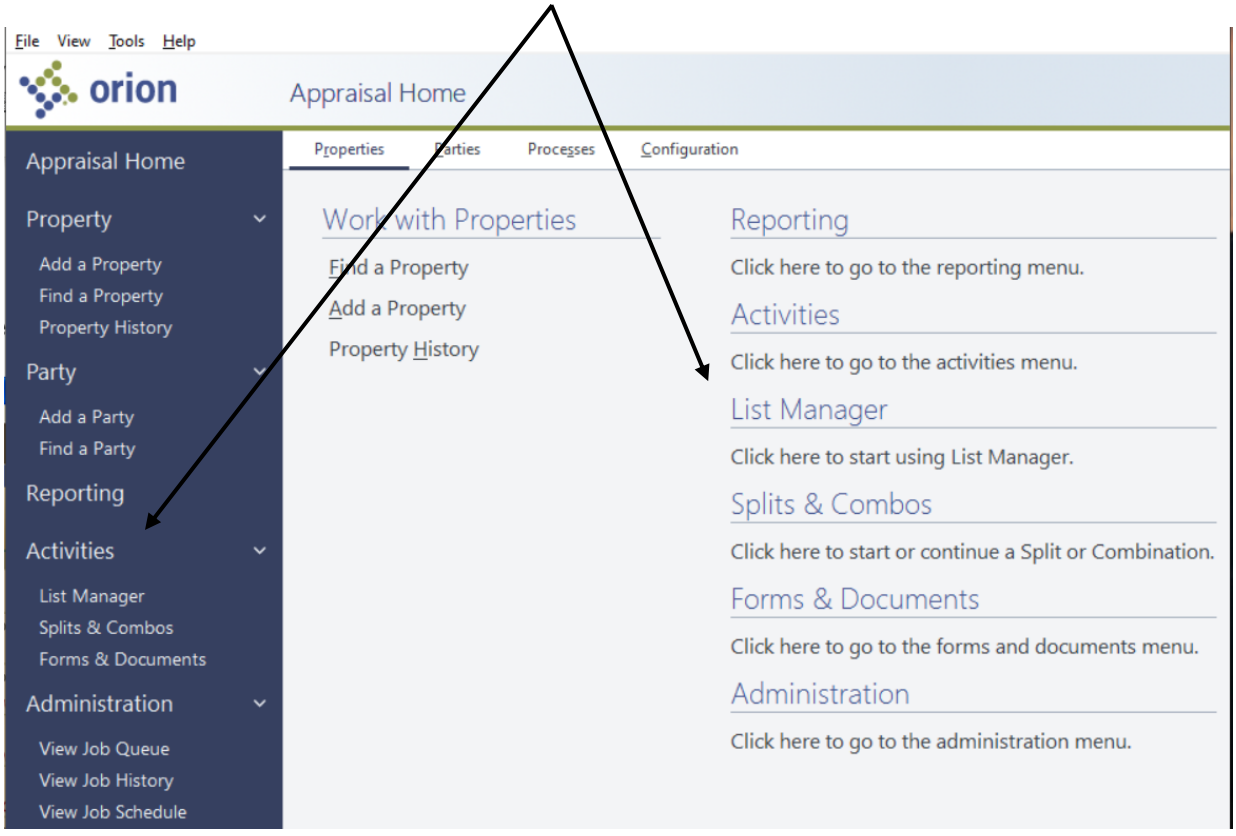
Using List Manager

Using List Manager, you can create, import, save, load, and organize user-defined lists of data records. These lists can be created when you are processing information in Appraisal, or you can create the list yourself using a query or a search function on different data types (i.e., list such as properties, exemptions, notices, and item pages). These options are intended to function as an ad hoc query tool.

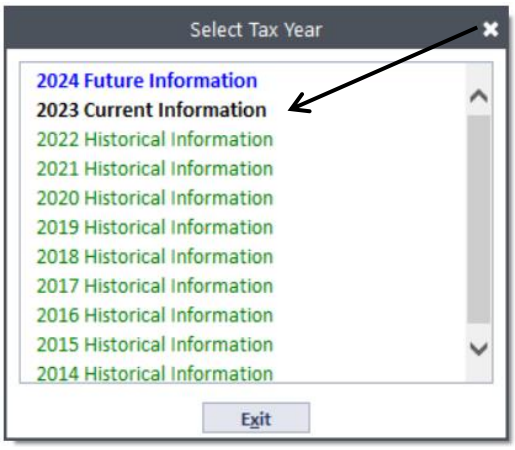
A variety of actions can be run against the list you create, depending on the type of list you choose to make. For example, if you create an **Item Page** type list, the actions you could perform include mass update functions such as updating any data entered fields on any item pages on the Appraisal tab in Orion. If you create a **Property** type list, you can then use this list when generating batch reports, batch calculations, or in other parts of the system.

Accessing List Manager

- Select List Manager from the Appraisal Home page.
- You can also select List Manager from the **Activities** section of the navigation menu.

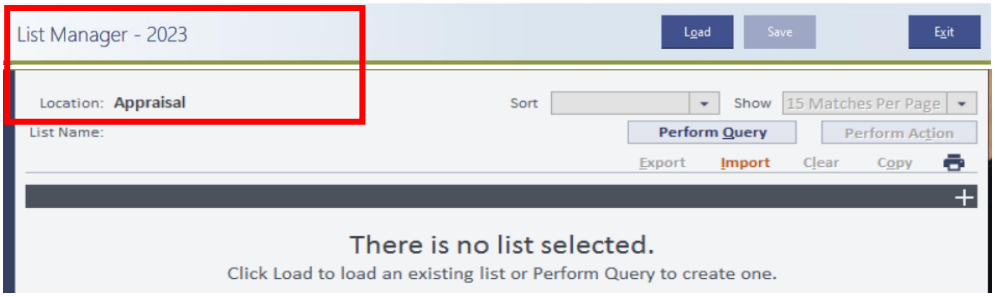


Accessing List Manager (continued)



Select the tax year for the list(s) you want to view, and the List manager page is displayed.
The current tax year will be in bold black lettering.

The top of the List Manager page displays the selected location as well as the tax year.



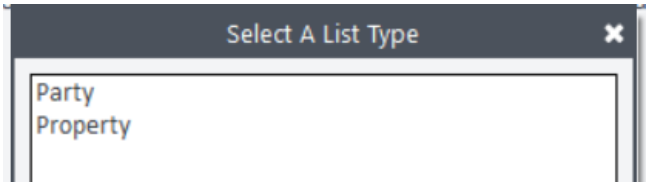
List Manager Options

If no list is displayed on the page, you can use one of the following options to access or create a list:

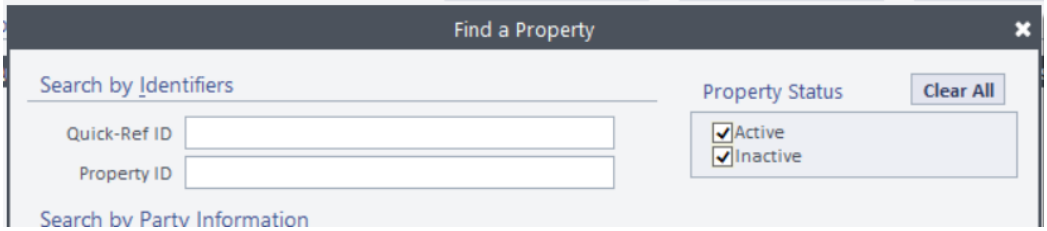
- Create a list
- Load a previously saved list
- Perform a query
- Import a list

Create a List in List Manager

1. Access List Manager.
2. With no list loaded, click + or press ALT+A
3. Use the **Select a List Type** dialog box to select the type of list you want to create (Party or Property). Typically, a Property Type list is created.



4. Use the **Find a Property** dialog box to search for the first property to add to the list.



5. Select the property you want to add to the list to return to the List Manager page.
6. Continue adding properties as necessary.
7. Save the new list so it can be accessed later.

As you add properties to the list, they are automatically sorted according to what is selected in the **Sort** option.

When you are viewing a created list, the following are some of the options available on the page:

- Copy the list
- Save or Delete the list
- Clear the list
- Print the list
- Perform an action
- Add items to the list
- Delete items from the list
- Access item record

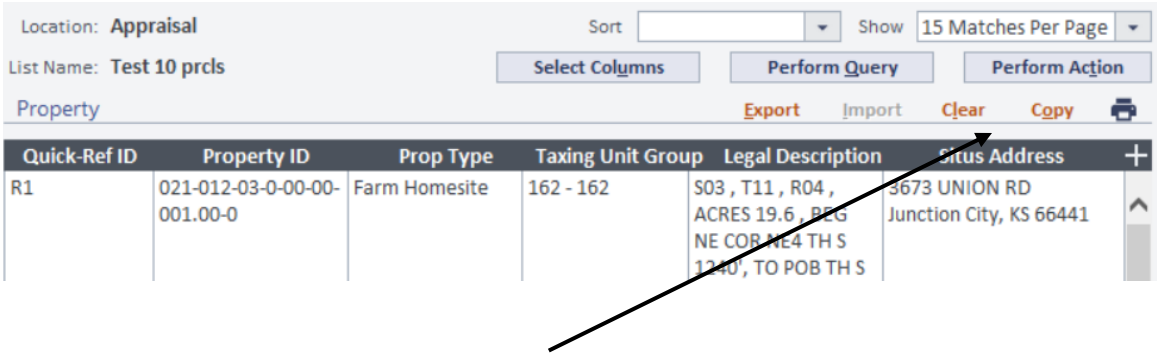
Copy a List in List Manager

When you have a list displayed on the List Manager page, use the **Copy** option to create a new list based off the one currently opened. You can also use this option to copy a list to another user's list of available lists. This is similar to saving a list, but you can choose which users can access the list.

1. Access List Manager
2. Create a list or load an existing list.
3. Click **Copy** (ALT+Y) in the list type header.
4. On the **Copy Current List** dialog box, enter the name that should be assigned to the list.
5. If you have comments regarding the list, enter them in the space provided, or click  if you need additional space to enter comments.
6. Click  next to the **To User(s)** field to select the users who should have a copy of the list available under their user ID. Click **Save** (ALT+S) to store the new list.

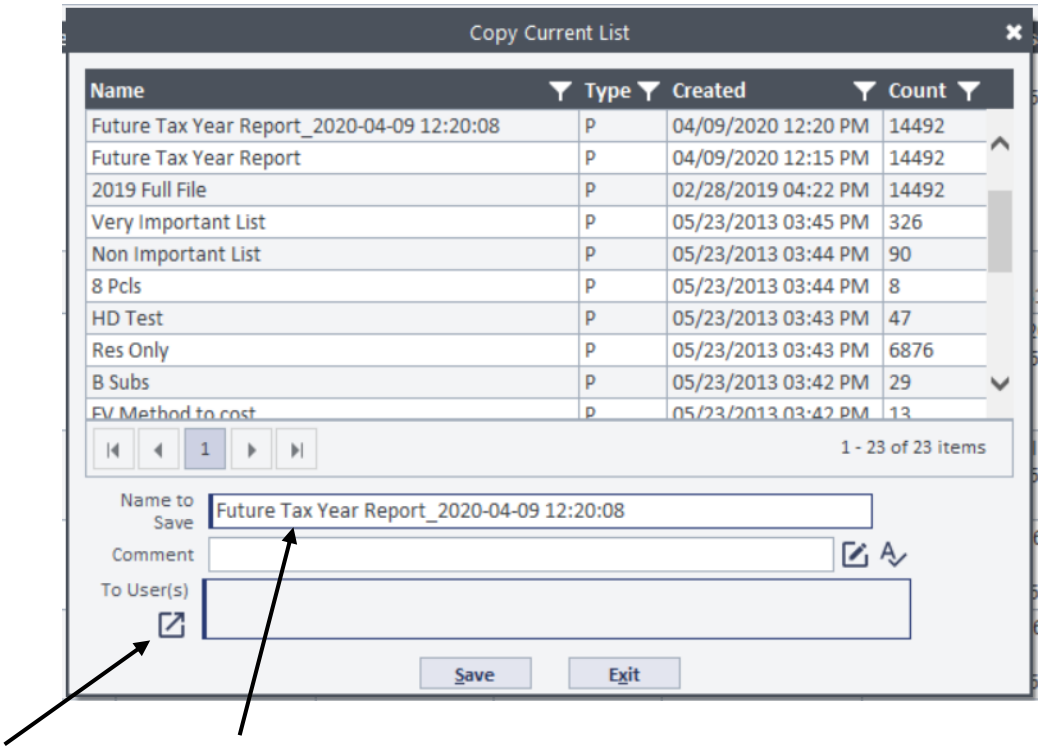
Copy a List in List Manager (continued)

The copied list is now displayed on the **Save Current List** dialog box along with the date and time when the list was saved.



Load any list and click Copy.

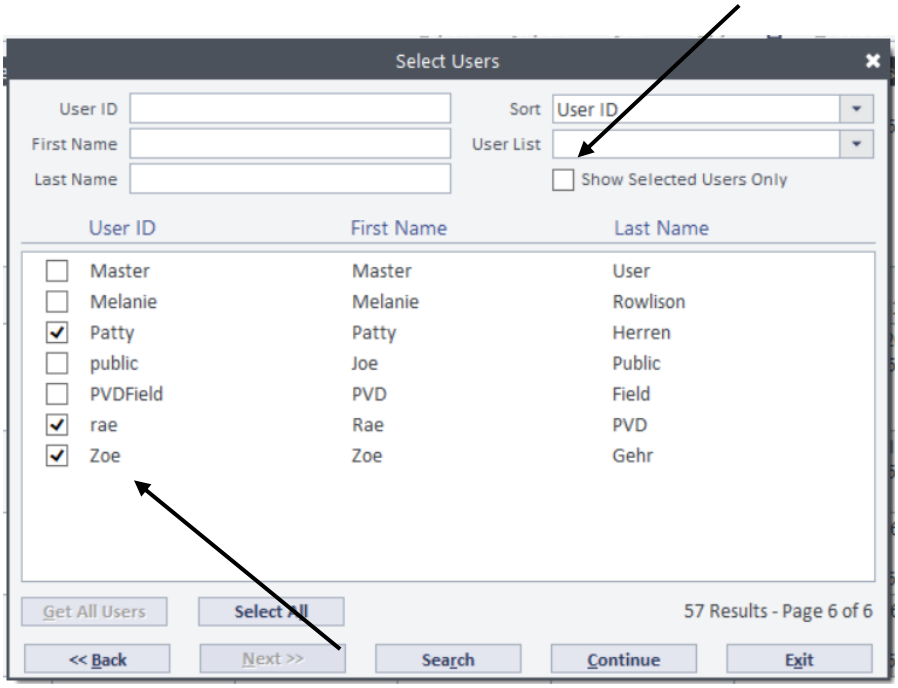
Reminder: A list created by a user can only be accessed by that user unless other users have been granted permission to access that list by using the "Copy" function as described in the following pages.



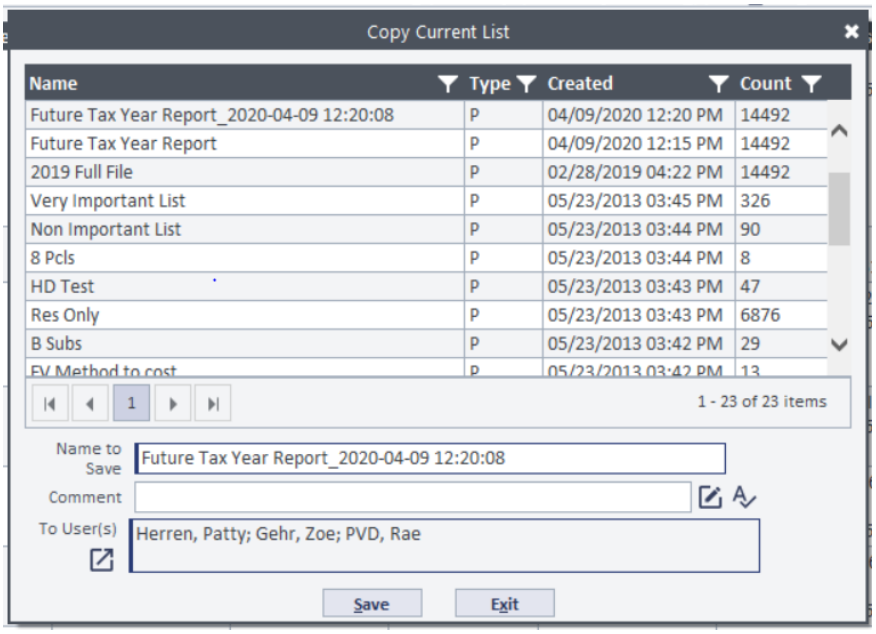
Enter the name of the list to be copied.
Click the icon for "To User(s)"

Copy a List in List Manager (continued)

Be sure that the “Show Selected Users Only” box is unchecked



Check the box(es) next to the user(s) who should be given access to the list.
Click Continue.

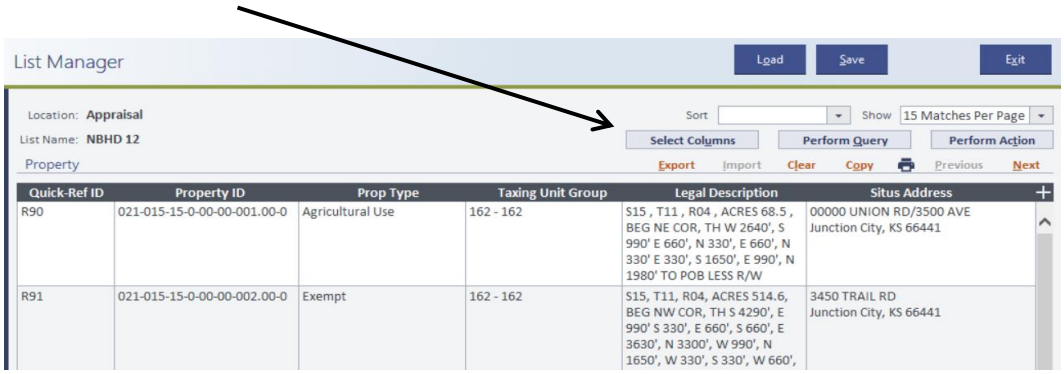


Click Save. The indicated users will now see the list available on their “Load List” dialog.

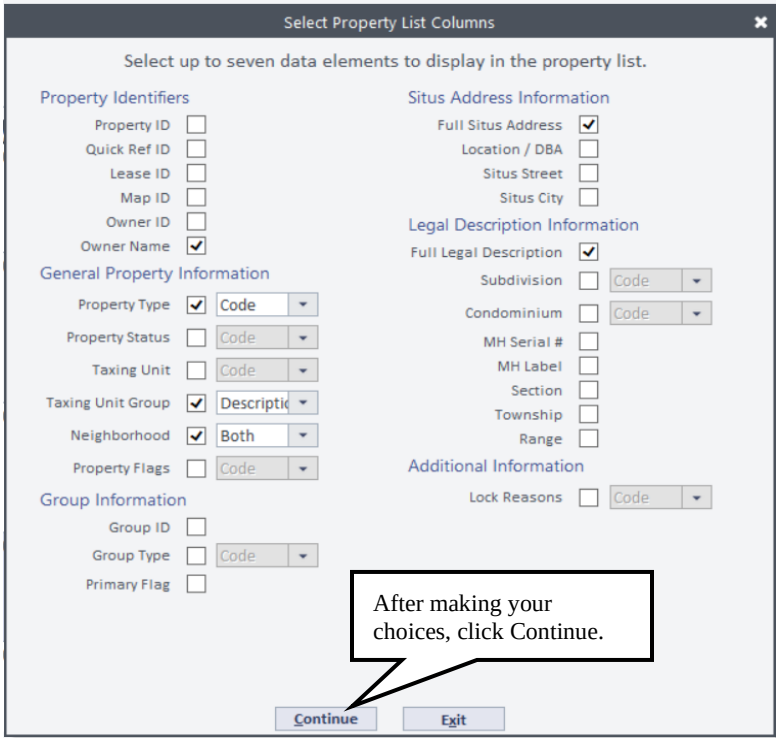
Viewing Lists in List Manager

The information displayed in the list depends on the type of list you are viewing. For example, the quick-ref ID, property ID, property type, taxing unit group, legal description, and situs address are displayed for a property list, but an exemption list shows the exemption type, status, effective and termination dates, owner, and any flags for the exemption.

*For all lists except the Select Notices list, y*ou have the ability to change the default information displayed on the lists with your choice of up to seven items. With a property type list loaded, click on Select Columns.



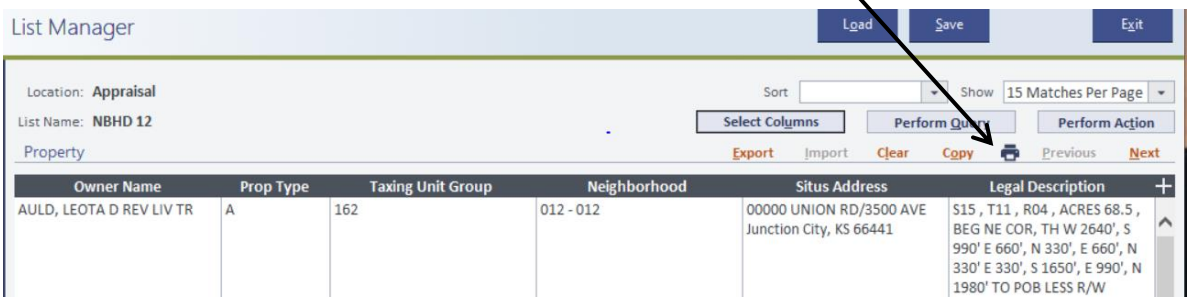
The Select List Columns format box will appear. You can select up to seven columns to replace the default columns. For code file type selections, you can choose to display the Code, the Description, or Both. These will be discussed more in each corresponding section. Below is an example of Property list choices.

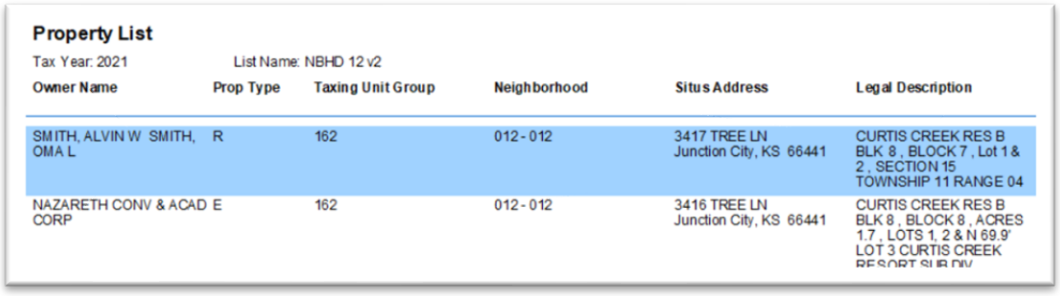


After clicking Continue, the list will now populate with the columns you chose.

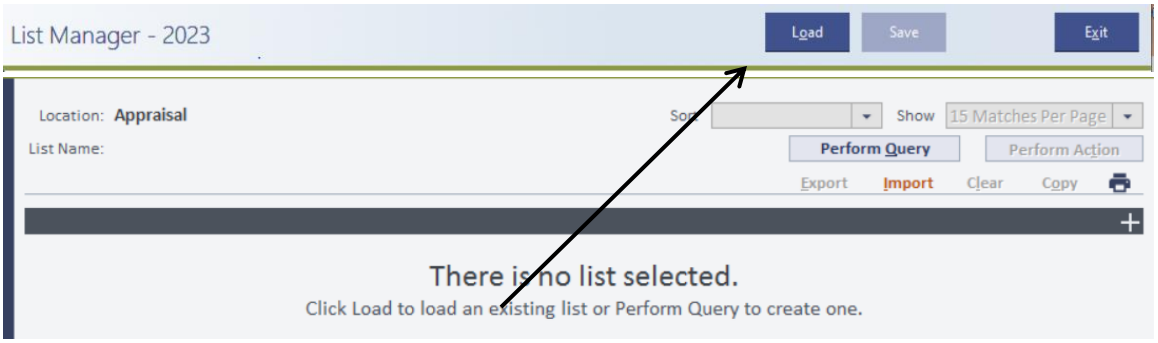
Viewing Lists in List Manager (continued)

Click Save to save this list with the new columns. If you PRINT this list now, the list will print with the new columns that were chosen.





Load a Previously Saved List in List Manager

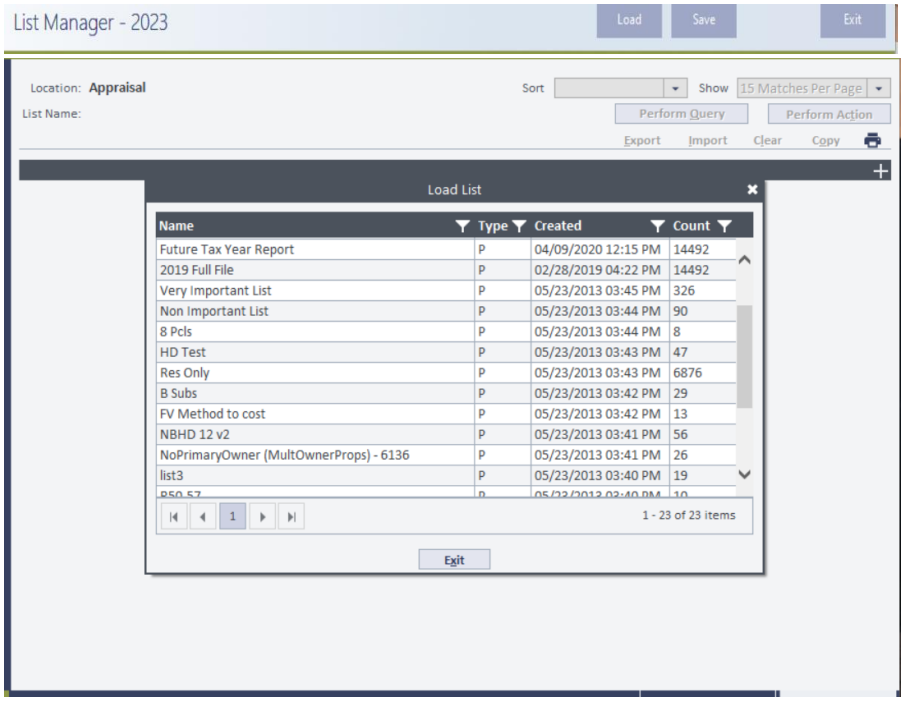


After a list has been saved and you want to view the list at a later time, that list can be loaded to view the items and perform actions. By clicking on **Load**, the **Load List** dialog box will appear which allows the user to retrieve a list previously saved by the same user.

1. Select the List Manager option in the navigation menu.
2. Select the tax year for the list(s) you want to view.
3. Click **Load** (ALT+L) to load a saved list.

4. The **Load List** dialog box contains the List Manager lists that were created previously by the same user. Select the list you want to view.

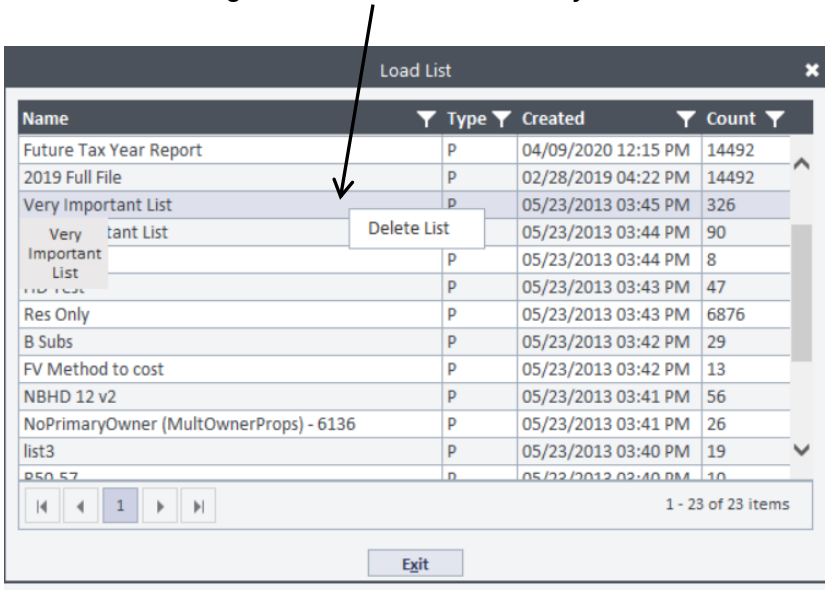
   Click Load, and the Load List dialog box will appear. Click on the list you want to load.



Delete a Saved List in List Manager

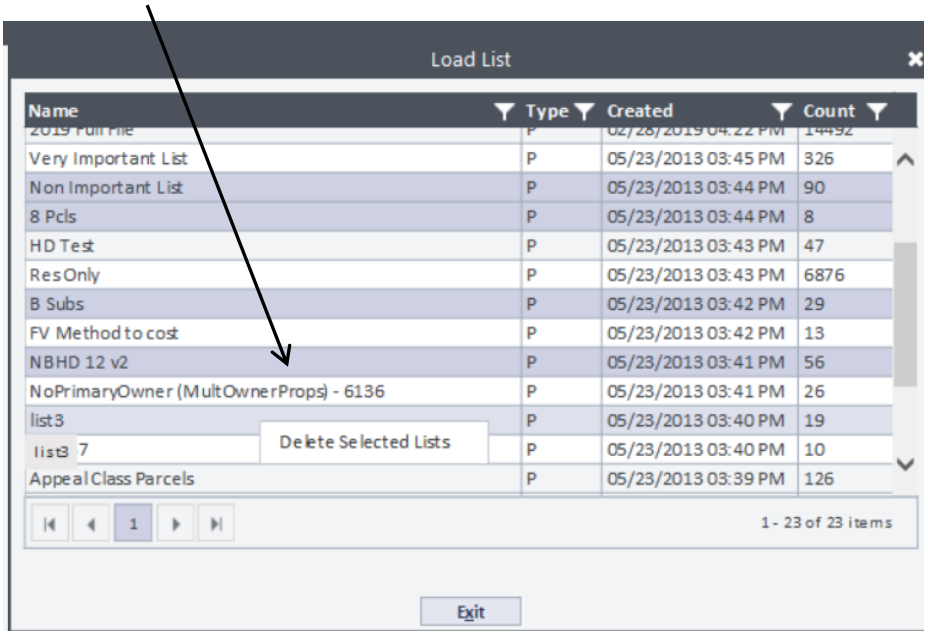
TO DELETE ONE LIST AT A TIME

From the **Load List** dialog box, **RIGHT**-click the list you want to remove and select **Delete List**.



TO DELETE MULTIPLE LISTS AT A TIME

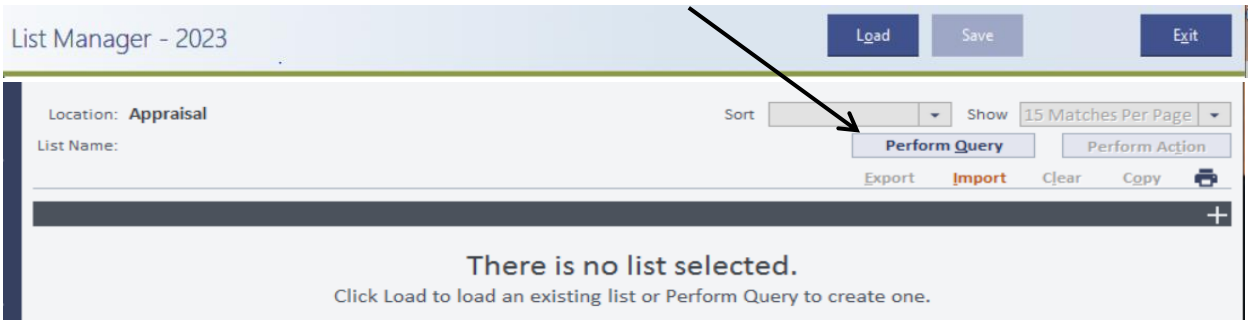
Hold down the ***Control*** button then ***LEFT***-click on each list you wish to delete to highlight them, then ***RIGHT-***click and click on **Delete Selected Lists** to delete all lists chosen.



While you can process options in Appraisal that will generate lists, you can also access List Manager to create a list from scratch.

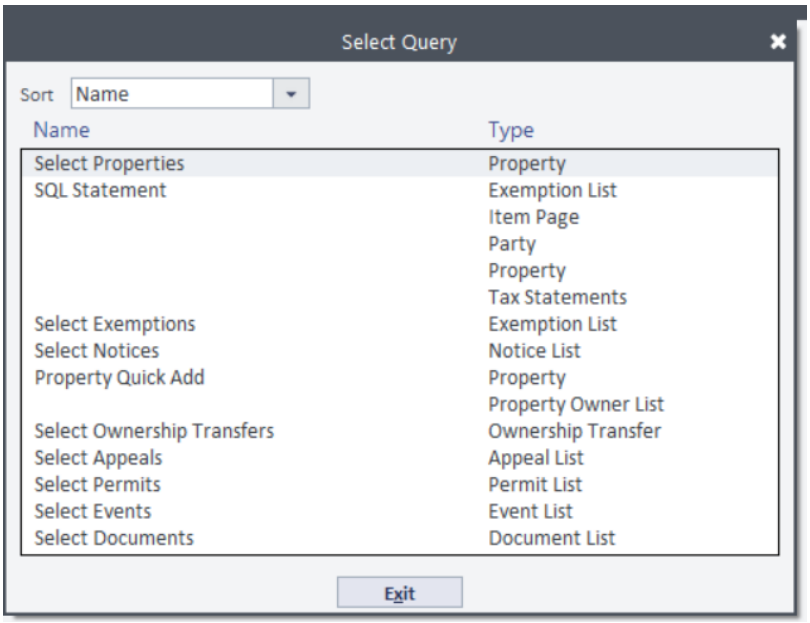
Perform Query to Create a List Manager list

From the List Manager page, click the **Perform Query** button to run an available query and create a list.



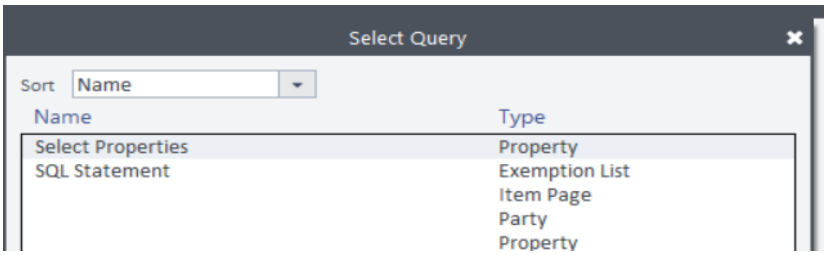
When you click **Perform Query** (ALT+Q), the **Select Query** dialog box is displayed. If a list is currently displayed, you need to indicate whether you want the query to add items to the list (select **Yes**) or to create a new list (select **No**).

All the available query options are displayed on this dialog box, and the type of list that can be created is displayed in the **Type** column. Use the **Sort** option to select how you want the options displayed (i.e., by name or by type). A dialog box will display a number of types of lists that can be created in List Manager. The most common use will probably be "**Select Properties**", to create a Property type list.



Select Property Queries

Choose the **Select Property** option from the **Select Query** dialog box if you want to pull properties that match certain criteria such as property identifiers, general property information, NBHD's, Taxing Unit Groups, situs addresses, and legal descriptions.



When the **Select Properties** option is chosen, the **Select Properties** dialog box is displayed. The tax year selected for List Manager is displayed at the top of the dialog box. Use the following sections to complete the property selection criteria:

- Property Identifiers

Property ID	Use this field to enter the specific property ID to select.
Lease ID	If you have a specific lease ID you want selected, enter that ID in this field.

Map ID	Enter the map ID to include in the property selection.
From Quick-Ref ID	Use this field with the **To Quick-Ref ID** field to enter a range of quick-ref IDs. Enter the first quick-ref ID you want to use for the range in this field. Click to search for the property from the **Find a Property** dialog box.
To Quick-Ref ID	Use this option to complete the range of quick-ref IDs. Enter the last quick-ref ID you want to use for the range in this field. Click to search for the property from the **Find a Property** dialog box.

- General Property Information

Property Type	Indicate the property types to include in the selection criteria. Click or press F4 to choose the appropriate types.
Property Status	Click or press F4 to select the property statuses you want to include in the selection criteria.
Taxing Unit	Use this field to specify which taxing units should be selected. Click or press F4 to choose the appropriate taxing units.
Taxing Unit Group	Use this field to specify which taxing unit groups should be selected. Click or press F4 to choose the appropriate taxing unit groups.
Neighborhood	Click or press F4 to select specific NBHD codes to include in the selection criteria.

- Situs Address Information

Location Name	Enter the location name you want the system to search for when creating the list of properties.
Situs Street	Enter the situs street name to use as selection criteria for the property list.
Situs City	Use this field to enter the city for the situs address you want to include in the selection criteria.

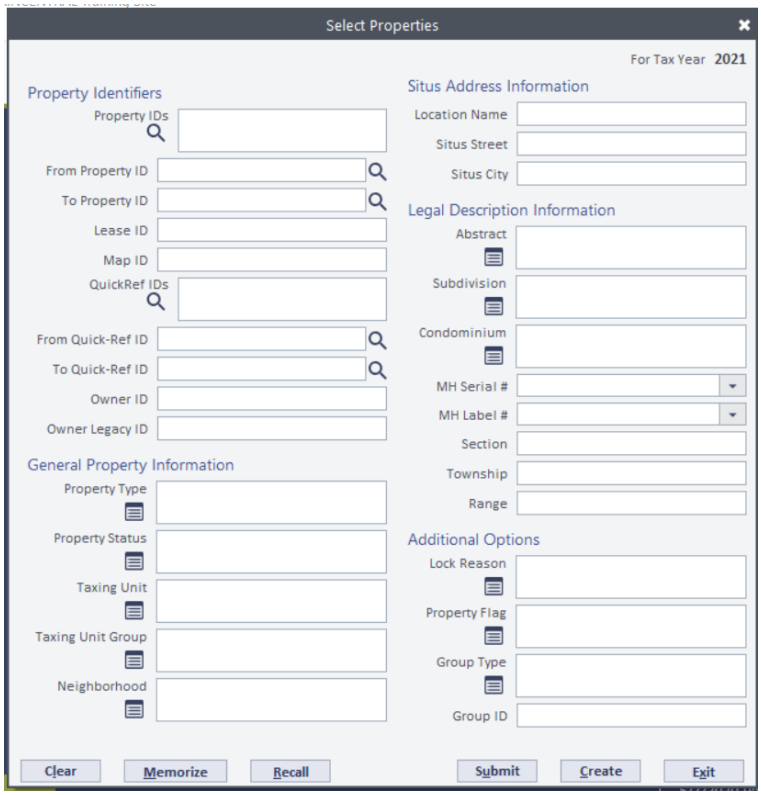
- Legal Description Information

Abstract	Enter the appropriate abstract codes to include in the property list. Click or press F4 to select the appropriate codes.
Subdivision	Use this field to enter the subdivision codes you want to include in the property list. Click or press F4 to select the appropriate codes.
Condominium	Enter the condominium codes to include in the property list. Click or press F4 to select the appropriate codes.

MH Serial #	Indicate whether the manufactured home's serial number should be blank (null) or not to be included in the property list.
MH Label #	Indicate whether the manufactured home's label number should be blank (null) or not to be included in the property list.
Section	Enter the section number to include in the selection criteria for the property list. This number is found in township legal descriptions.
Township	Use this field to enter the township number to include in the property list. This number is found in township legal descriptions.
Range	Enter the range number to include in the selection criteria for the property list. Found in township legal descriptions.

- Additional Options

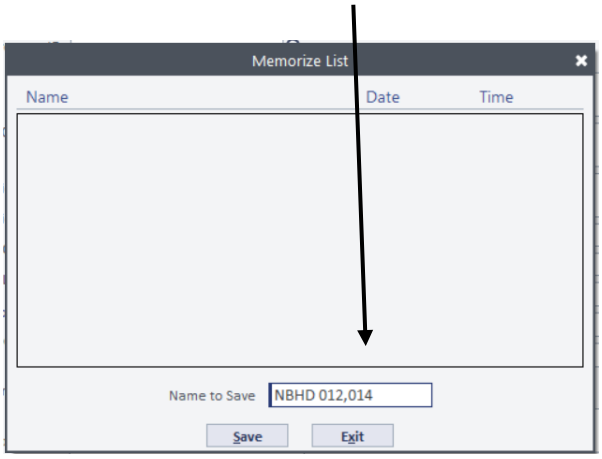
Lock Reason	Use this field to find locked parcels based on lock reasons. Click to select appropriate codes
Property Flag	Use this field to find parcels based on lock reasons. Click to select appropriate codes
Group Type	Use this field to find locked parcels based on lock reasons. Click to select appropriate codes



Once your conditions are set, you have two choices to produce your results.

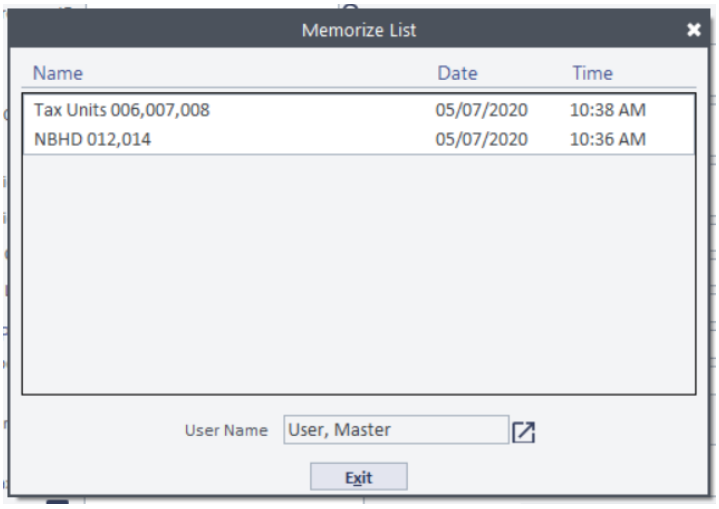
- "**Create"** (ALT+C) button, and the List results are displayed immediately upon the completion of the download.
- **Submit**" (ALT+U) to send the job to the Job Queue to begin running automatically, in the event that you want to save and view the results later.
- **Clear** (ALT+C) to clear all the fields on the dialog box.
- **Memorize** (ALT+M) to save the settings for that query so they can easily be recalled.

The list must be given a name, then click Save.



Recall (ALT+R) can be used to automatically complete some or all the fields on the dialog box by using a format that has already been Memorized.

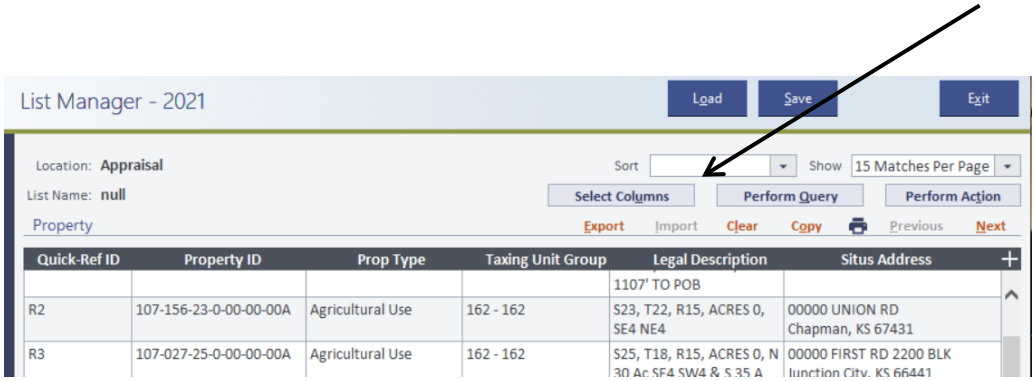
To Recall a list, left click on the list to recall.



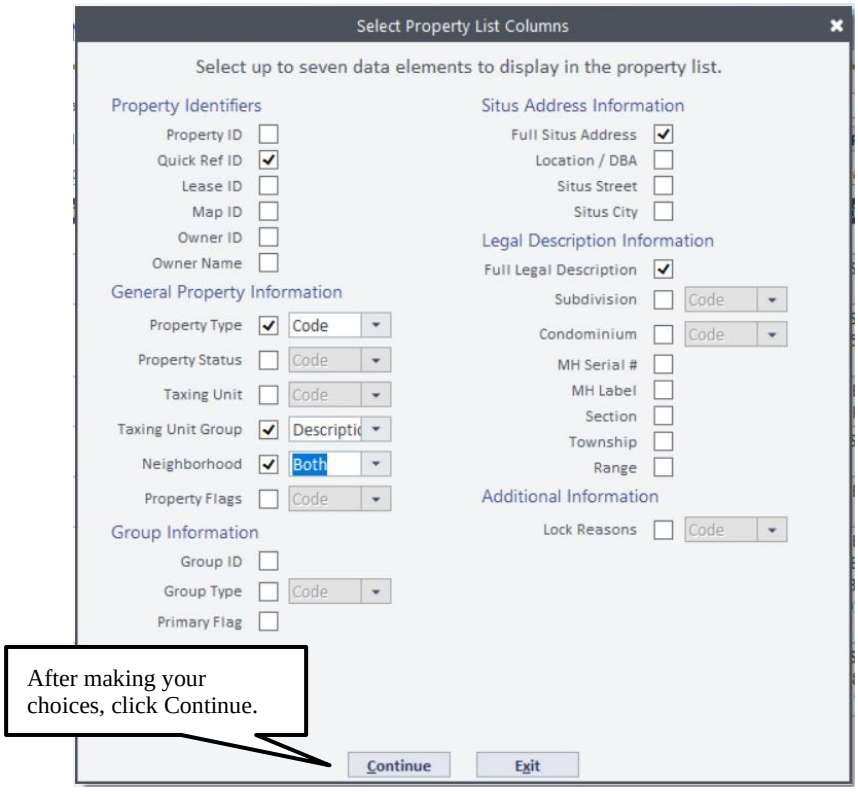
Lists that have been memorized can be deleted or renamed. RIGHT- click on the appropriate list and choose to rename the list or to delete the list.

An example of the List Manager results is shown below. List Manager creates an interactive list that can be used to immediately access the parcels selected. **Click on any row to be taken directly to that parcel record.** If you are in the parcel record and want to go back to the List Manager list, click Exit. Remember to Save this list to access it at a later time or to perform any actions.

When you have a list created you can change the columns that display by clicking on Select Columns.



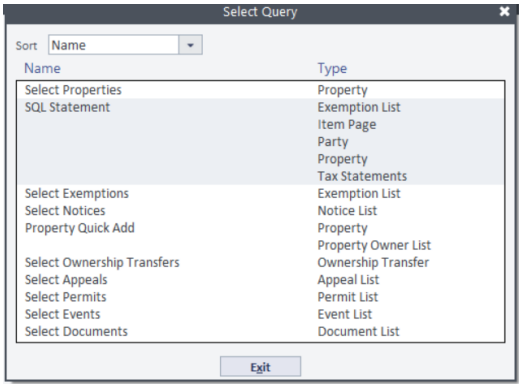
The Select Property List Columns format box will appear. Select up to seven columns to replace the default columns. For code file type selections, you can choose to display the Code, the Description, or Both. Continue



Click Save to save this list with the new columns. If you PRINT this list now, the list will print with the new columns that were chosen.

SQL Statement Queries

A second option of creating a list of properties in List Manager, is selecting the ”**SQL Statement**” as long as you are familiar with writing SQL commands and know that you are needing your list in Property Type format, Party Type format or Item Page Type format



When you choose the **SQL Statement** option, the **Dynamic SQLs** dialog box is displayed. Use the following fields to determine the type of list you are creating. **List Type**	If you are creating a new list, use this field to indicate whether you are creating a property, exemption, notice, or item page list from this query. If you are adding to an existing list, the type of list you are working with is automatically displayed and the field is disabled.
Database	Use this field to determine which database the list is pulled from. Select "Appraisal" to generate the list from the live Appraisal database or choose "Reporting" to create the list using the Odyssey IQ database.

Use the middle area of the **Dynamic SQLs** dialog box to enter a SQL statement for the query.
The following buttons are available at the bottom of the **Dynamic SQLs** dialog box to assist you with completing the fields on this dialog box:

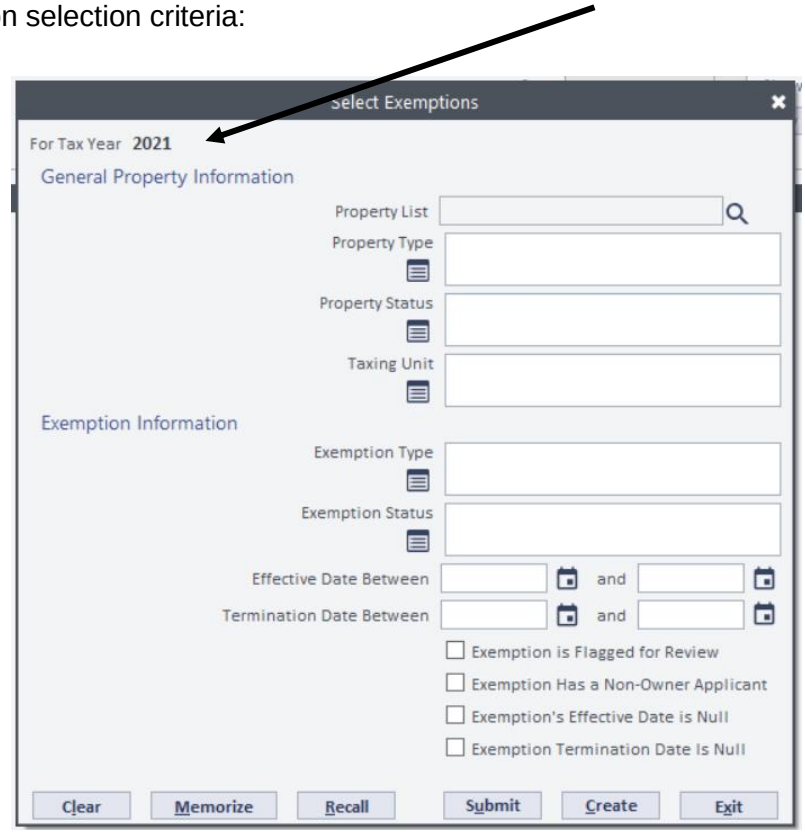
- Click **Clear** (ALT+C) to clear all the fields on the dialog box.
- Use **Memorize** (ALT+M) to save the settings for that query so they can easily be recalled.
- **Recall** (ALT+R) can be used to automatically complete some or all the fields on the dialog box.

When you have completed the fields, click **Create** (ALT+C) to create the list. The system takes the information you entered and creates a list of properties that can be saved in List Manager.
You can also choose to click **Submit** (ALT+U) to send the query through the job processor. When you click **Submit** (ALT+U), the **Save Current List** dialog box is displayed. Enter the name you want assigned to the list and click **Save** (ALT+S) to send the list to the job processor. Depending on your setup, the **Job Queue** page may then be displayed. When the job is complete, the list name you entered is then displayed on the **Load** dialog box. Click the list name to view it.

Select Exemptions Queries

Choose the **Select Exemptions** option from the **Select Query** dialog box to find property exemptions that match certain criteria.

When the **Select Exemptions** option is chosen, the **Select Exemptions** dialog box is displayed. The tax year selected for List Manager is displayed at the top of the dialog box. Use the following sections to complete the exemption selection criteria:



- General Property Information

Property List	Choose a Property Type list that has already been created and saved in List Manger.
Property Type	Indicate the property types to include in the selection criteria. Click or press F4 to choose the appropriate types.
Property Status	Click or press F4 to select the property statuses you want to include in the selection criteria.
Taxing Unit	Use this field to specify which taxing units should be selected. Click or press F4 to choose the appropriate taxing units.

- Exemption Information

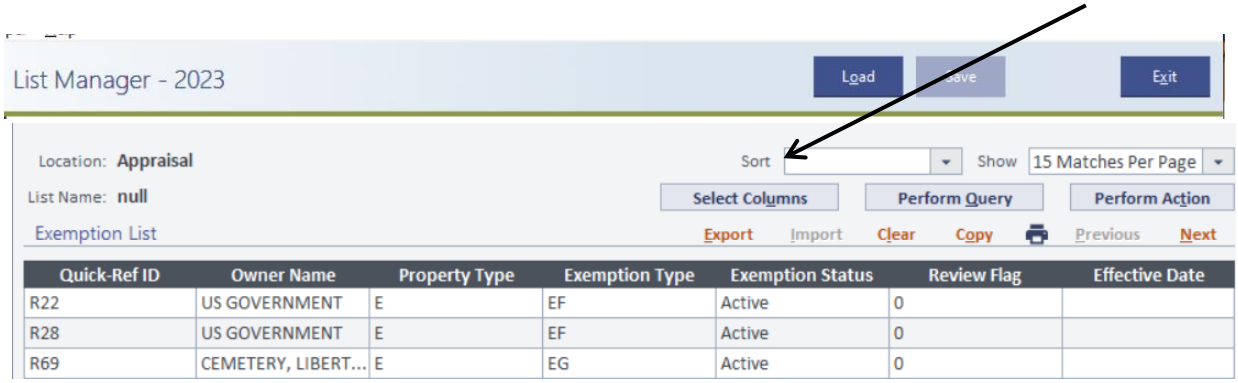
Exemption Type	Click to select the exemption types to include in the list.
Exemption Status	Click to select the current status to include in the list.

Effective Date	Enter the effective date range for the exemptions. Use the first field to enter the beginning date of the range and the second field to enter the last date. Click beside the appropriate field to select each date from a calendar.
Termination Date	Enter the exemption termination date range. Use the first field to enter the beginning date of the range and the second field to enter the last date. Click beside the appropriate field to select each date from a calendar.
Exemption Is Flagged for Review	Select this option if you only want to include exemptions that have been flagged for review.
Exemption Has a Non-Owner Applicant	Use this option if you only want to include exemptions that have non-owner applicants on them.
Exemption's Effective Date Is Null	If you only want the list to contain exemptions with no effective dates, select this option.
Exemption Termination Date Is Null	Select this option if you only want to include exemptions with no termination dates in the list.

Once your conditions are set, you have two choices to produce your results.

- **Create** (ALT+C) button, and the List results are displayed immediately upon the completion of the download.
- **Submit** (ALT+U) to send the job to the Job Queue to begin running automatically, in the event that you want to save and view the results later.

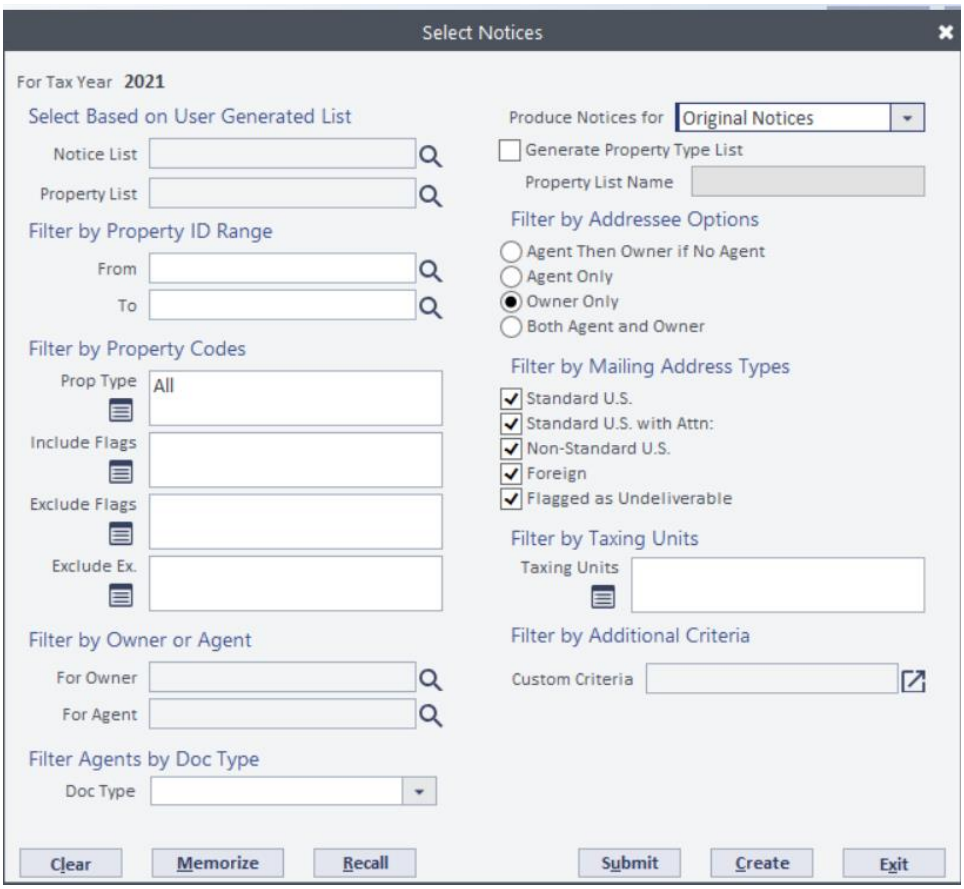
When you have a list created you can change the columns that display by clicking on Select Columns.



Select Notices Queries

The option to “Select Notices” will be used when the county is preparing to mail out CVN’s. This is the first step in that process. When you are processing assessment notices, you need to select the parameters that should be used when selecting which notices to generate. These parameters filter the properties and generate notices only for those matching all the criteria. Either "create" or "submit" the list job, and then "Save" it in order to actually use the new list in the second step of the process, which is found in the "Processes/Assessment Notices" window (if you have the proper security role to perform this process).
Choose the **Select Notices** option from the **Select Query** dialog box to find properties that match specified criteria for the assessment notices.

When the **Select Notices** option is chosen, the **Select Notices** dialog box is displayed. The tax year selected for List Manager is displayed at the top of the dialog box. The **Select Notices dialog box** is divided into several sections. Use these sections to determine how you want the notices to print and which properties and/or parties for which you want to print the notices.



- General Information

Name	Enter the name you want to assign the list of notices that should be generated. This is the list name you need to select from the **Assessment Notices Print Parameters** page.

Produce Notices for	Use this field to select the properties you want to include in the job. The following options are available: • Use the "Original Notices" option if you want to produce notices only for properties without an assessment notice process summary record for the selected tax year. • When you select the "Corrected Notices" option, notices are produced for all properties that match the parameters, and an assessment notice process summary record is added to all properties. If a property has an existing notice process summary record for the selected tax year, a corrected notice record is added to the process summary. Be sure to select the correct option for the job you are running. Changes to the process summary are permanent and cannot be undone.

- Filter by Property ID Range

From	Use this field with the **To** field to enter a range of property IDs. Enter the *first* property ID you want to use for the range in this field. Click to search for the property from the **Find a Property** dialog box. This field is cleared if you enter information in the Query/**List** field.
To	Use this field to complete the range of property IDs. Enter the *last* property ID you want to use for the range in this field. Click to search for the property from the **Find a Property** dialog box. This field is cleared if you enter information in the **Query/List** field.

- Filter by Property Codes

Prop Type	Click to select the appropriate property types to *include* in the job.
Include Flags	Click to select the property flags to *include* in the job.
Exclude Flags	Click to select the property flags to *leave out* of the job.
Exclude Ex.	Click to select the active exemptions to *leave out* of the job.

- Filter by Owner or Agent

For Owner	Click to search for the owner for whom you want to generate notices.
For Agent	Click to search for the agent for whom you want to generate notices.

Select Notice Queries (continued)

- Filter Agents by Doc Type
- Filter by Addressee Options

Agent then Owner if no Agent	If there is an active agent with the correct document type association, the notices are printed for the agent. If there is not an agent, the notices are printed for the owner of the property.
Agent Only	Notices are only printed if there is an agent with the correct document type association.
Owner Only	Notices are only printed for the owner of the property.
Both Agent and Owner	Notices are printed for the owner of the property. If there is an active agent with the correct document type association, notices are also printed for the agent.

- Filter by Mailing Address Types

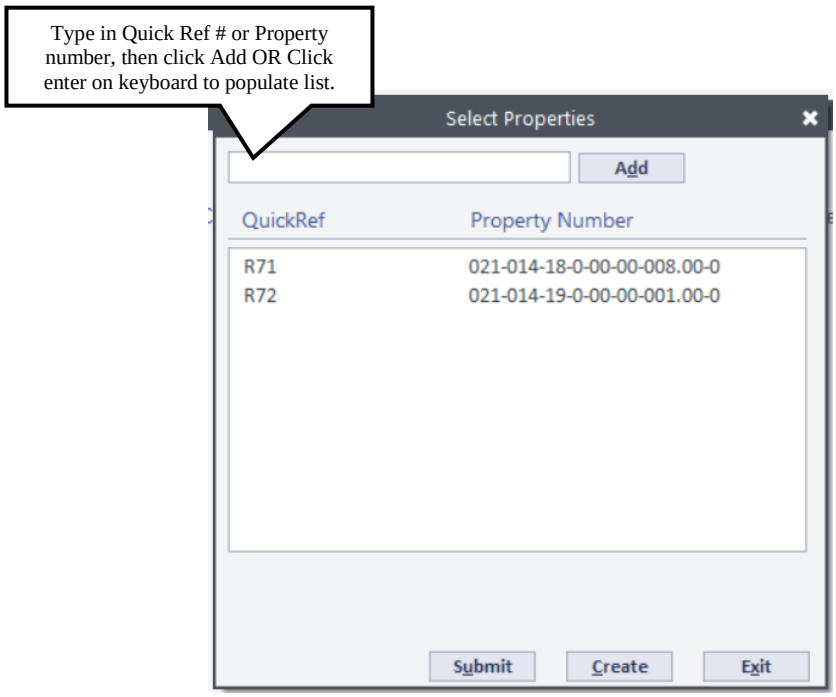
Standard U.S.	This option includes parties that have physical addresses within the United States (e.g., 1212 Main Street).
Standard U.S. with Attn:	This option is similar to the **Standard U.S.** address, but it also includes an **Attn:** line.
Non-Standard U.S.	This option includes U.S. addresses that are not physical addresses (e.g., a P.O. Box or route number).
Foreign	This option includes all addresses that are outside of the United States.
Flagged as Undeliverable	Select this option to print a notice for all parties with undeliverable addresses.

- Filter by Taxing Units
- Filter by Party Flags
- Filter by Additional Criteria

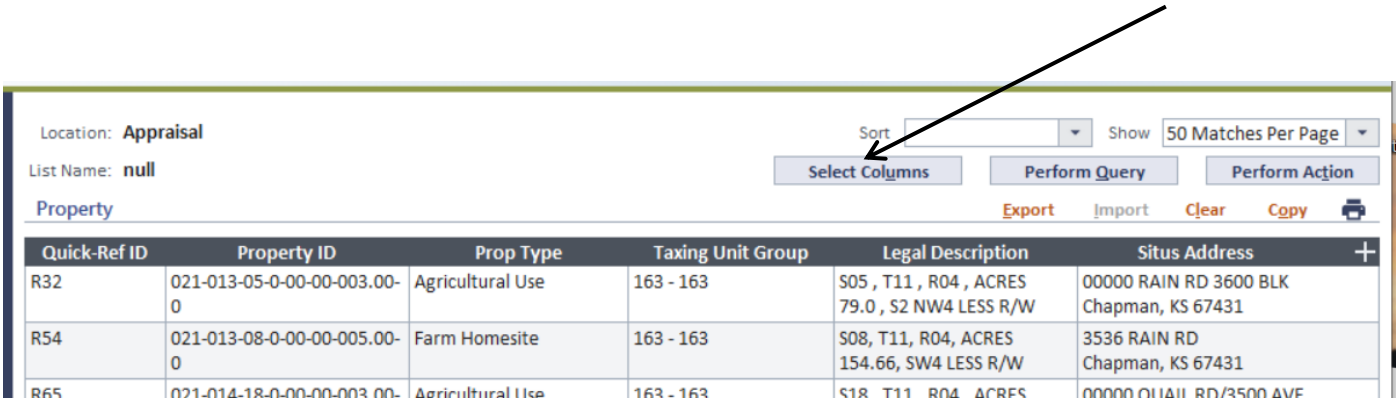
This is the only list that there is not an option to Select Columns and modify the view or print.

Property Quick Add Queries

Another way to manually create a list of properties that can be used in Orion for various batch processes and activities is to use “Property Quick Add”. You can either enter in the QuickRefIDs or the actual property numbers (19-digit PINs) of the records you want to include in your list, and then create and save your results. The Property List you created and saved can be reloaded and used to perform your desired actions on, such as printing PRCs for the list of records or performing batch calculations on each record included. ***<u>This is the quickest, fastest option to create a smaller Property Type list.</u>***

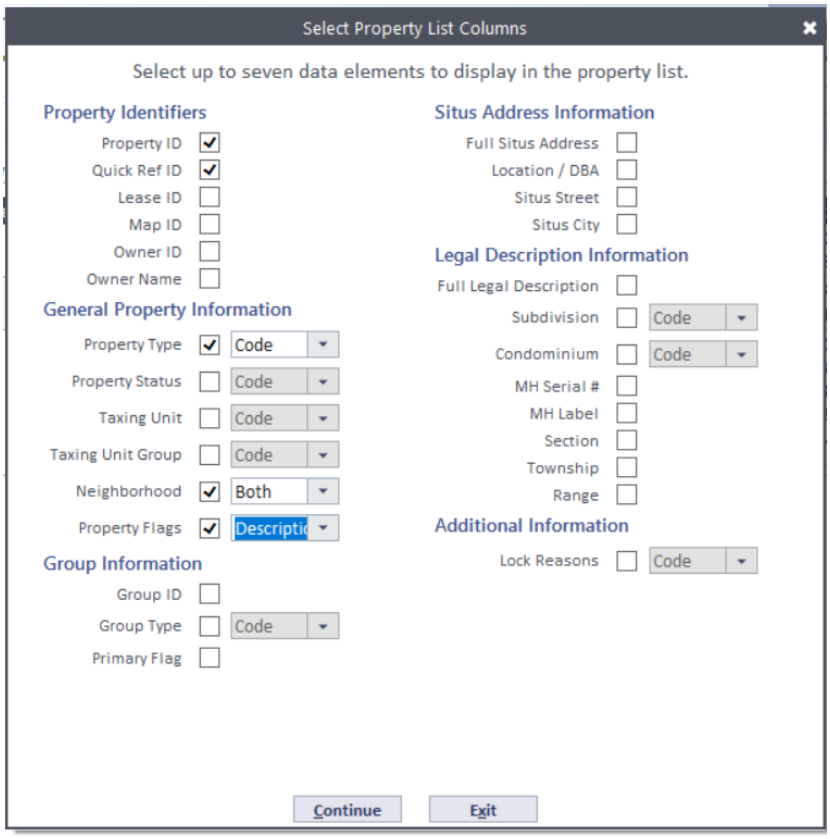


When you have a list created you can change the columns that display by clicking on Select Columns.



Property Quick Add Queries (continued)

Choices for **Property type list**. Select up to seven columns to replace the default columns. For code file type selections, you can choose to display the Code, the Description, or Both.
Continue

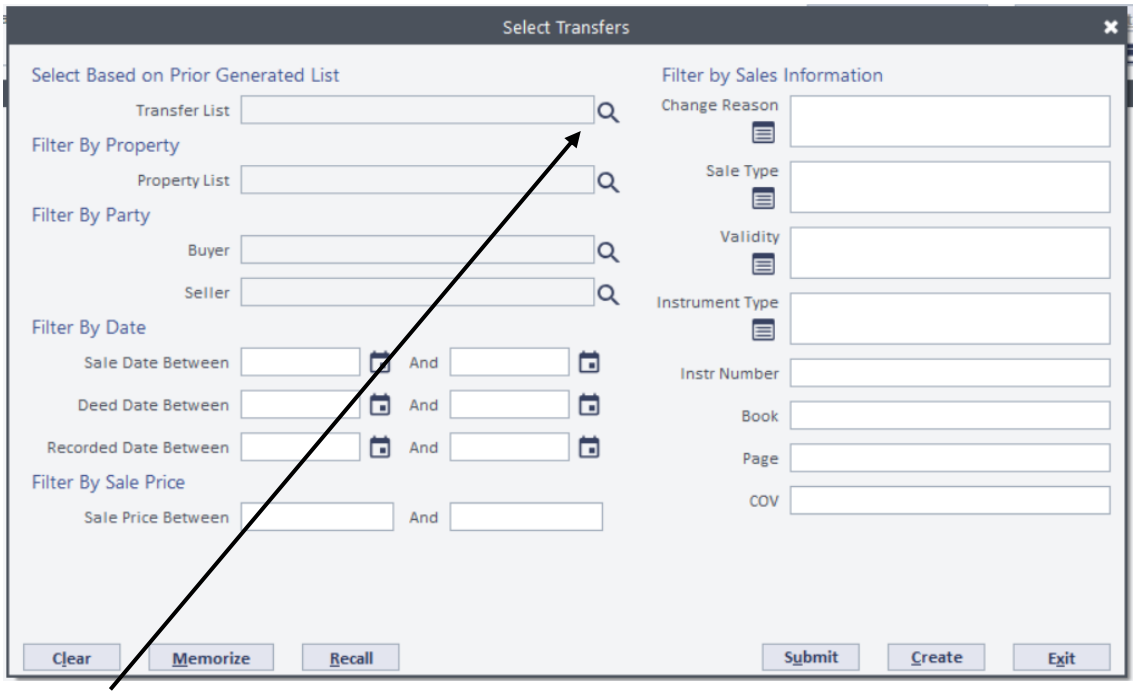


Click Save to save this list with the new columns. If you PRINT this list now, the list will print with the new columns that were chosen.

Select Ownership Transfers Queries

Select Ownership Transfers will allow you to create an Ownership Transfer type list of parcels that have had sales/transfers in a sale date range, deed date range, recorded date range or a sale price range. This function was little use to Kansas until an enhancement in 2019. This is another way to create a list of parcels that have sold. There is only one Action to perform for these lists and that is to print sales forms. The list is interactive and clicking on a sale will take you to the transfer tab in Orion.

The Select Transfers format screen is shown below. Information can be narrowed using the “Filter by” areas.



Transfer List – This option allows the user to use a previously saved Transfer List. Click the search icon next to the Transfer List field, the user will then click the Select an Existing Transfers Type List. A “Load List” dialog box will launch showing Ownership Transfer Lists have been saved for that user. If a list is selected, the list name will display in the field. The report generated will now print a new list of the sales that are in the Transfer List but can be filtered further by sale dates range, deed date range, recorded date range in the Filter By Date section. Further filtering can be made by sale price range in the Filter By Sale Price section. The list can be filtered even further by change reason, sale types, validity code and instrument types populated in the Filter by Sales Information section.

- **Filter by Property** – Property List – This option is similar to the Transfer List option. You can Create a New One-Time List, Create and Save a New List or Select an Existing Property type list.

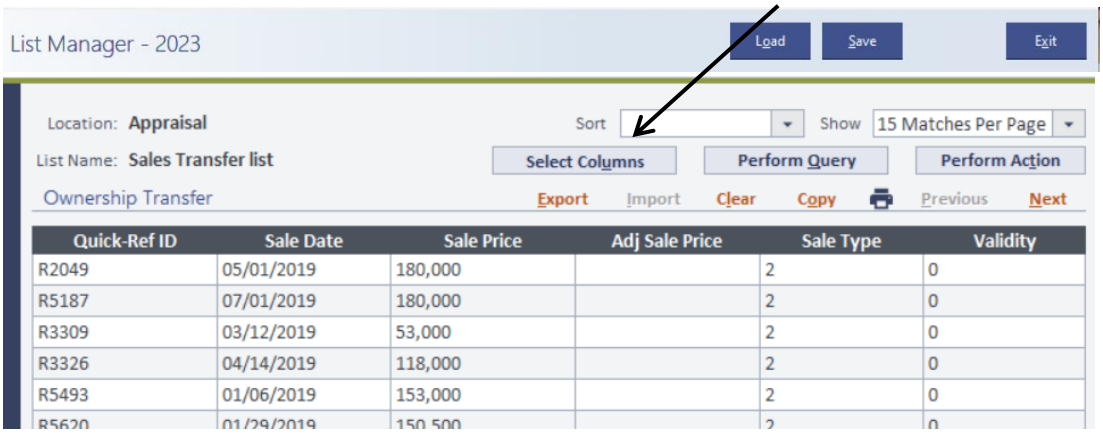
- **Filter by Party** – Can be used to search by Buyer name or by Seller name. These search fields would be to find all properties bought or sold by a single buyer or seller for the ranges specified.

- **Sale Date Between** – Enter the date range. If left blank, the report will look for all sale dates to present.

Select Ownership Transfers (continued)

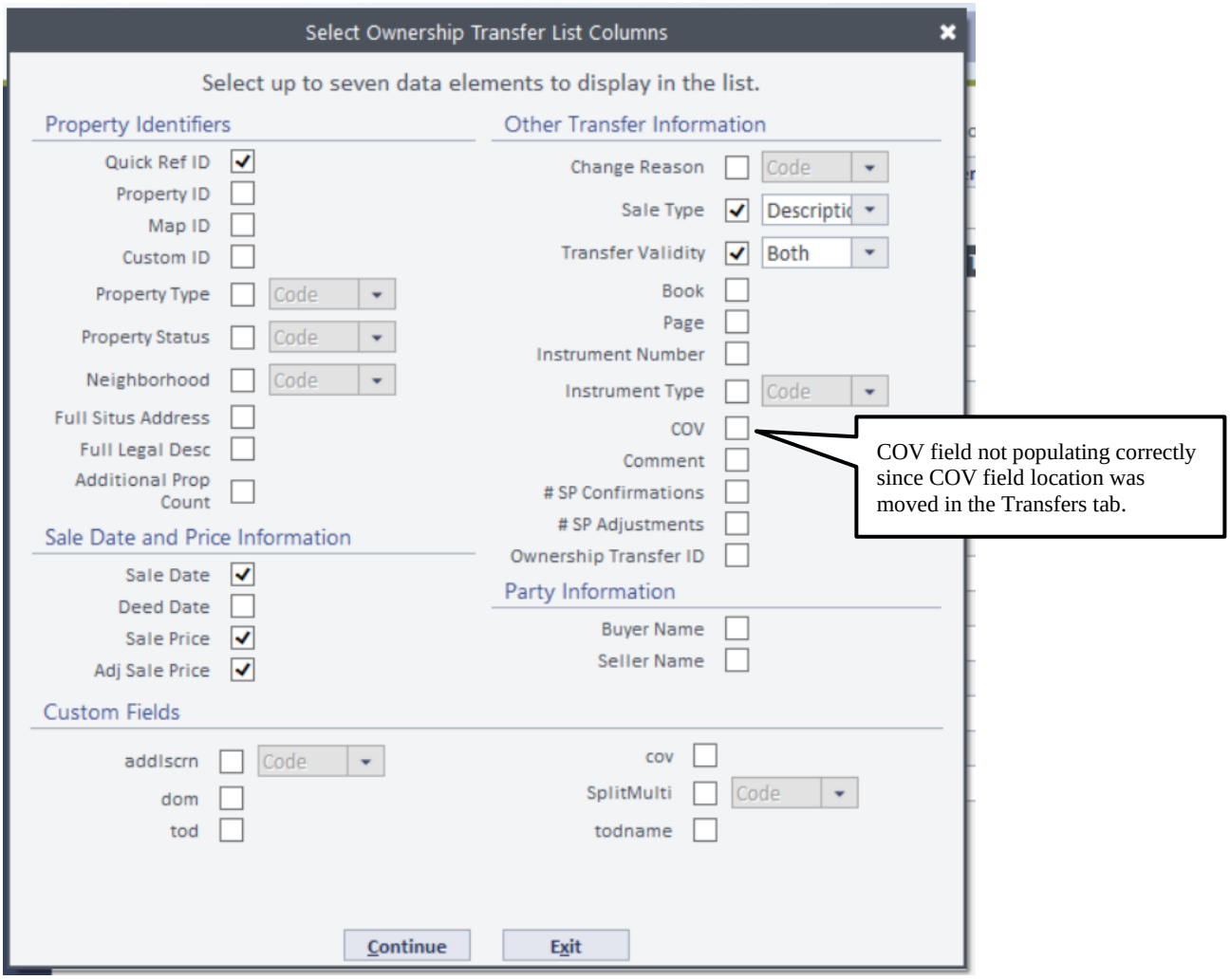
- **Deed Date Between** – Enter the deed date range. If left blank, the report will look for all deed dates to present.
- **Recorded Date Between** – Enter the recorded date range. If left blank, the report will look for all recorded dates to present.
- **Sale Price Between** – Enter the sale price range. If left blank, the report will look for all sale prices.
- **Change Reason** – Enter which reason codes you want in the report. If left blank, all reason codes will be chosen.
- **Sale Type** – Enter which property types you want in the report. If left blank, all property types will be chosen.
- **Validity** - Enter which validity codes you want in the report. If left blank, all validity codes will be chosen.
- **Instrument Type** - Enter which instrument codes you want in the report. If left blank, all instrument codes will be chosen.
- **Instrument Number** – Search by a single instrument number.
- **Book** – Enter book number you want in the report. If left blank, all will be chosen.
- **Page** – Enter book number you want in the report. If left blank, all will be chosen.
- **COV** - Enter book number you want in the report. If left blank, all will be chosen.

When you have a list created you can change the columns that display by clicking on Select Columns.



Quick-Ref ID	Sale Date	Sale Price	Adj Sale Price	Sale Type	Validity
R2049	05/01/2019	180,000		2	0
R5187	07/01/2019	180,000		2	0
R3309	03/12/2019	53,000		2	0
R3326	04/14/2019	118,000		2	0
R5493	01/06/2019	153,000		2	0
R5620	01/29/2019	150,500		2	0

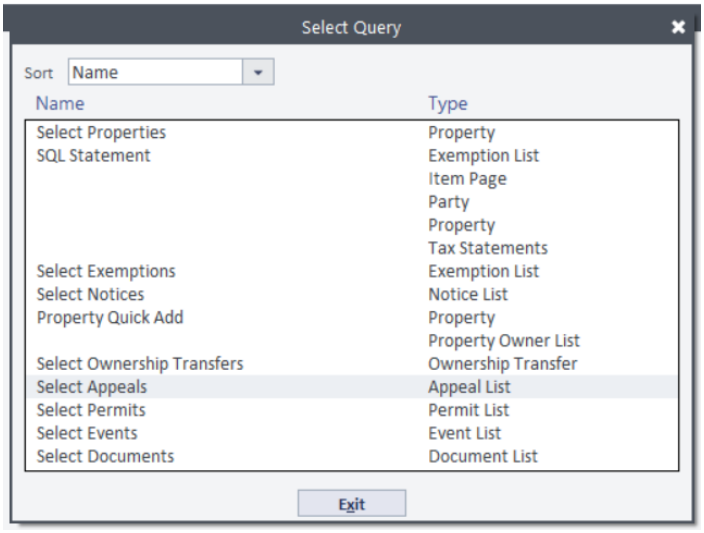
Choices for an **Ownership Transfer type list**. Select up to seven columns to replace the default columns. For code file type selections, you can choose to display the Code, the Description, or Both.
Continue



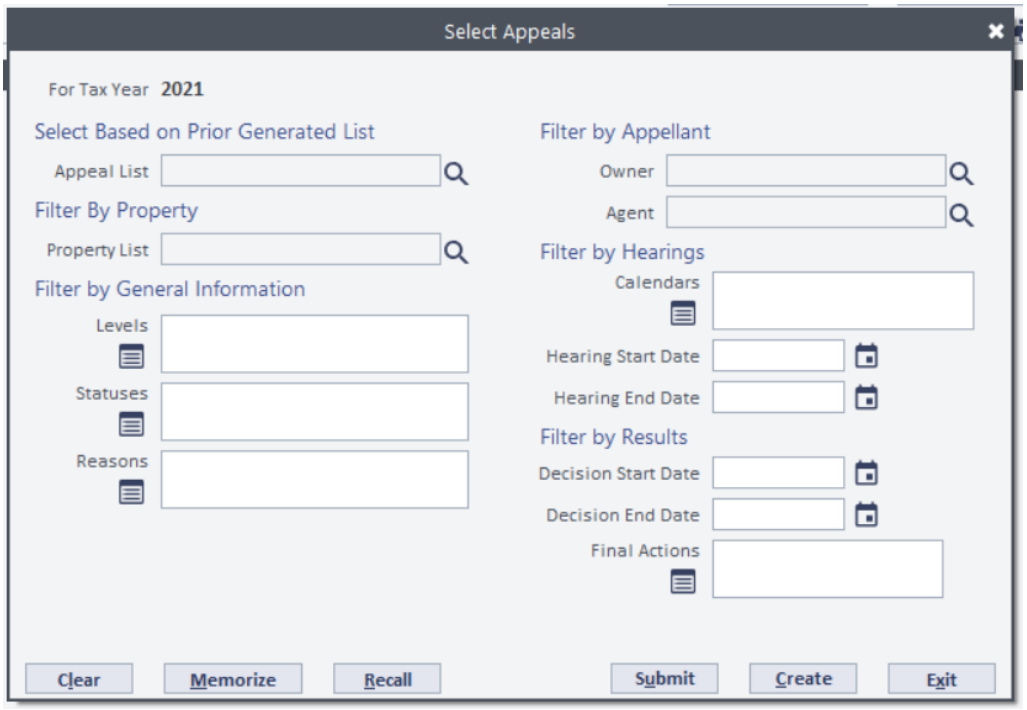
Click Save to save this list with the new columns. If you PRINT this list now, the list will print with the new columns that were chosen.

Select Appeals Queries

Select Appeals is a newer list type and will allow you to create an Appeal type list of parcels that have had appeals in the date range selected in the format screen. This list type was created for the state of Nebraska, but it has some use for users here in Kansas. After creating an Appeal type list, there are several Actions that can be performed. The list is interactive, and clicking on a parcel in the list will take you to the parcel and opens on the Appeals tab.



Note: When querying appeals, your list manager session must be in the year you want the information from. Example: You want to know how many active hearings you have in 2019. You would have to be in the 2019 "Historical information" in List Manager to query the 2019 appeals.



After saving or loading an Appeal type list, by clicking on Perform Actions you can do the following, depending on your security rights:

Print Appeal Forms	Update Appeal Field Check
Print Appeal Notice Forms	Update Appeal Level
Remove Appeals From Schedule	Update Appeal Reason
Update Appeal Appraiser	Update Appeal Results
Update Appeal Custom Fields	Update Appeal Status

In the Select Appeals format screen, as shown on the previous page, start in the filtering the appeals in your report. If no information is filtered, your report will populate with all appeals in the tax year selected.

- **Appeal List** – This option allows the user to use a previously saved Appeal List. The business scenarios where this will be useful are limited. When the user clicks the eyeglass icon next to the Appeal List field, the user clicks the Select an Existing List row, a Load List dialog will launch showing Appeal Lists saved for that user. If a list is selected, the list name will display in the field. The report generated will now print a new list of the appeals that are in the Appeal List but filtered further by any of the other filter properties.

- **Filter by Property** – Property List – This option is the same as the Appeal List option, only uses a previously saved Property type list.

- **Levels** – Choose which Appeal Levels you want for your report. If left blank, the report will look for all levels.

- **Statuses** – Choose which statuses you want for your report. If left blank, the report will look for all statuses.

- **Reasons** – Choose which appeal reason codes you want for your report. If left blank, the report will look for all reason codes.

- **Owner –** Select the eyeglass icon and enter a name. This will create a list of all the appeals listed under that owner.

- **Agent** - Select the eyeglass icon and enter a name. This will create a list of all the appeals listed under that agent.

- **Calendars** – choose which appeal calendars you want the report to pull data for. If left blank, all calendars will be chosen.

- **Hearing Start Date** – enter start date of when hearings were scheduled that you want in your report.

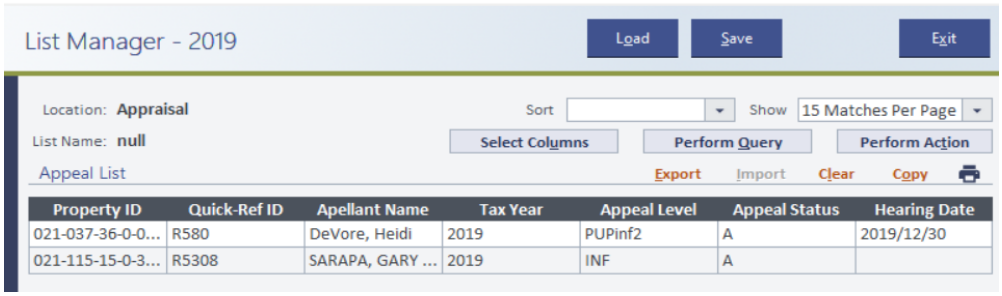
- **Hearing End Date** – enter end date of last hearings that were scheduled that you want in your report. If left blank, the report will look for all hearing dates from the start date to present.

- **Decision Start Date** – enter start date of when decisions were made

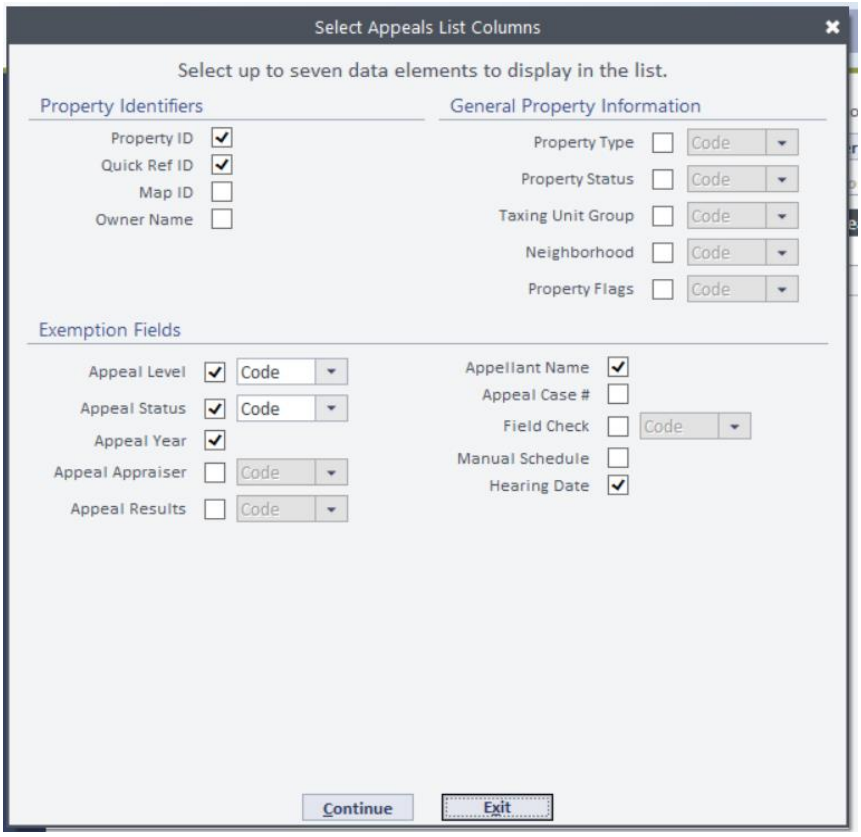
- **Decision End Date** – enter end date of last decision dates. If left blank, the report will look for all decision dates from the start date to present.

- **Final Actions** - enter which final action codes you want in the report. If left blank, all final action codes will be chosen.

When you have a list created you can change the columns that display by clicking on Select Columns.



Select up to seven columns to replace the default columns.



Click Save to save this list with the new columns. If you PRINT this list now, the list will print with the new columns that were chosen.

The Appeal type lists created in List Manager can also be used to print forms for appeals listed using the Group Appeals section, located under Processes – Group Appeals.

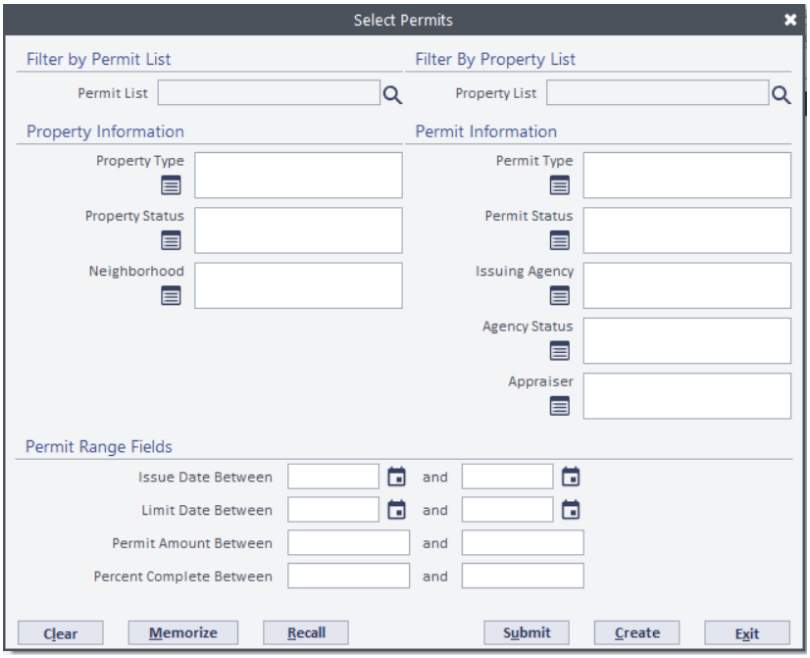
Select Permits Queries

Select Permits is a new list type and will allow you to create a Permit type list of parcels that have had Permits in the date range selected in the format screen. After creating a Permit type list, there are several Actions that can be performed. The list is interactive, and clicking on a parcel in the list will take you to the parcel and opens on the Permits tab.

After saving or loading a Permit type list, by clicking on Perform Actions you can do the following, depending on your security rights:

Print Appraisal Cards
Update Agency Status
Update Appraiser
Update Custom Fields
Update Issue Date
Update Issuing Agency
Update Limit Date
Update Percent Complete
Update Permit Comment
Update Permit Status
Update Permit Type

In the Select Permit format screen as shown below, start by filtering the permits in your report. If no information is filtered, your report will populate with all permits in all tax years.



- **Permit List** – This option allows the user to use a previously saved Permits List. When the user clicks the eyeglass icon next to the Permit List field, the user clicks on Select an Existing List, a Load List dialog will launch showing Permit Lists saved for that user. If a list is selected, the list name will display in the field. The report generated will now display a list of the permits that can be filtered further by using any of the other filter properties.

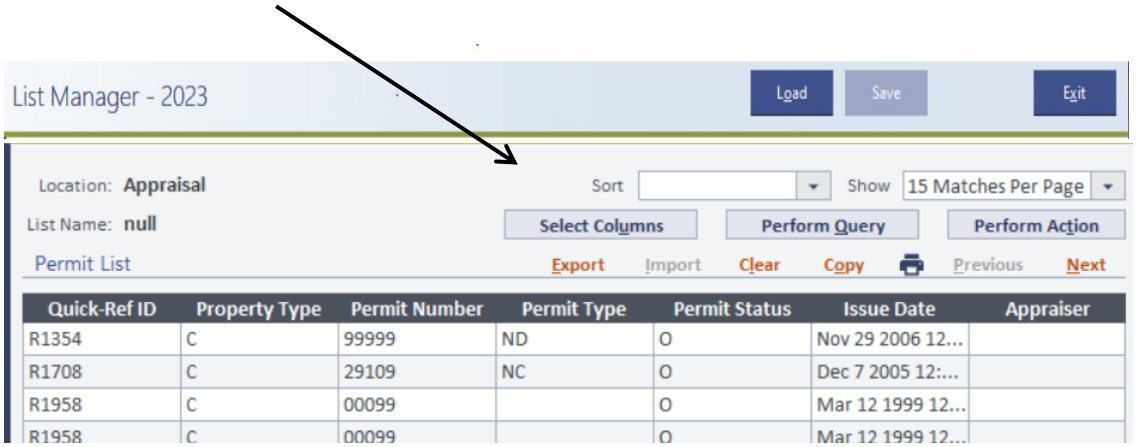
- **Property List** – This option is similar to the Permit List option except that you can also Create a New One-time List, Create and Save a New List or use a previously saved Property type list.

Select Permits (continued)

- **Property Type** – Indicate the property types to include in the selection criteria. If left blank, all types will be chosen.
- **Property Status** - Select the property statuses you want to include in the selection criteria. If left blank, all will be chosen.
- **Neighborhood -** Select specific NBHD codes to include in the selection criteria. If left blank, all neighborhoods will be chosen.
- **Permit Type –** Select the types of permits you want to include in the selection criteria.
- **Permit Status –** Select either open or closed permits to include in the selection criteria.
- **Agency Status** – Select the agencies you want to include in the selection criteria.
- **Appraiser** – enter the appraiser. If left blank, the report will look for all appraisers listed on the permit.
- **Issue Date Between** – Choose an issue date range. If left blank, issue dates will be ignored.
- **Limit Date Between** – Choose a limit date range. If left blank, limit dates will be ignored.
- **Permit Amount Between** – Choose a permit amount range. If left blank, the report will look for all permit amounts.
- **Percent Complete Between** – Choose a percent complete range. If left blank, percent complete will be ignored.

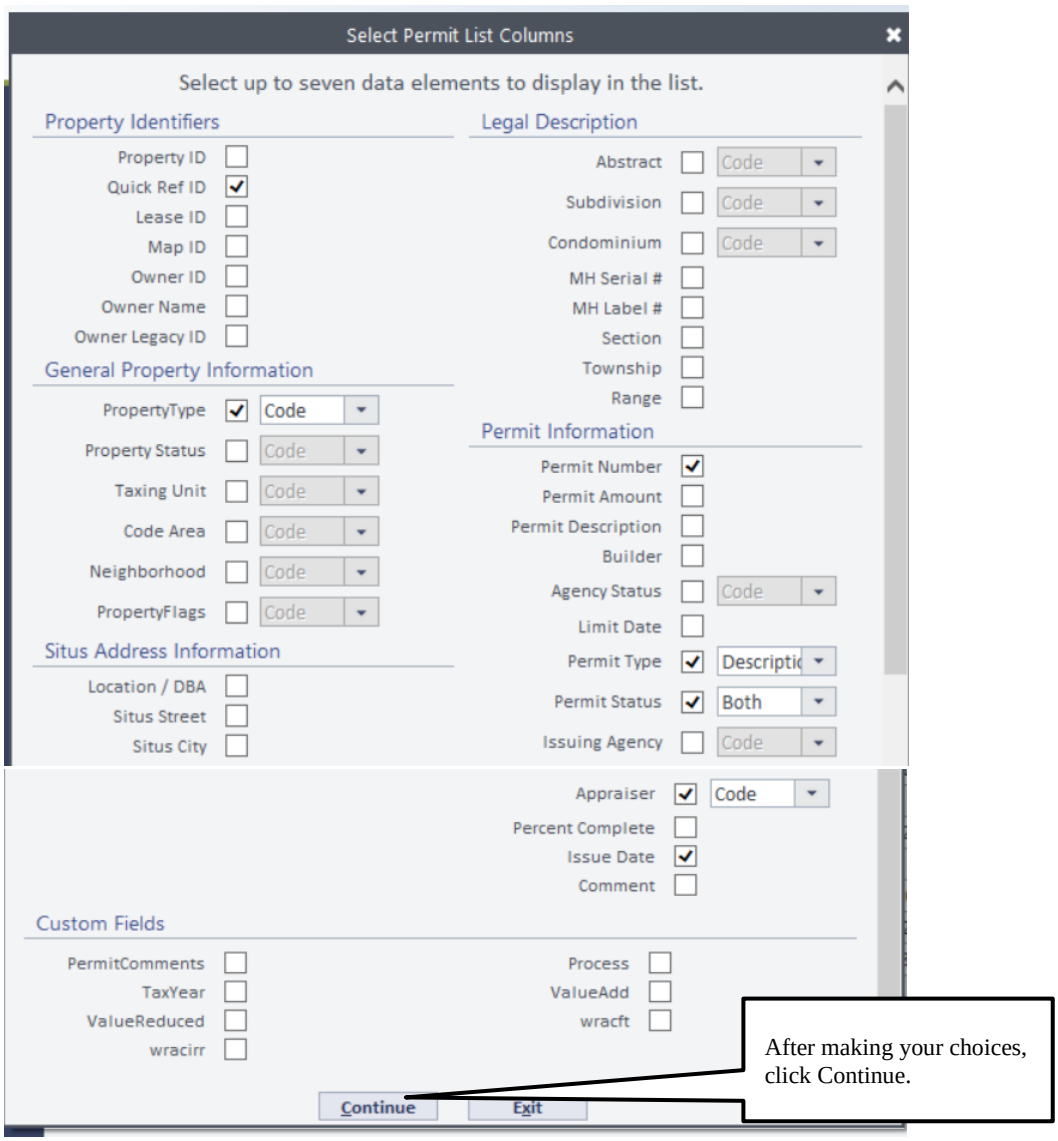
When you have a list created you can change the columns that display by clicking on Select Columns.

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Select Permits (continued)

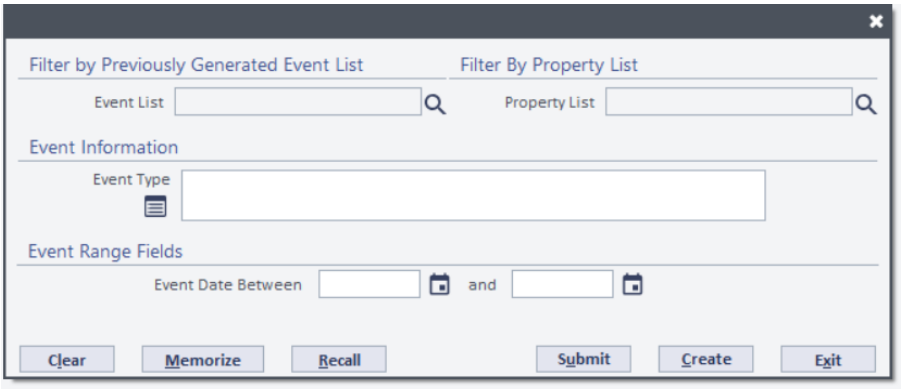
Choices for a **Permits type list**. Select up to seven columns to replace the default columns. For code file type selections, you can choose to display the Code, the Description, or Both.



Click Save to save this list with the new columns. If you PRINT this list now, the list will print with the new columns that were chosen.

Select Events Queries

Select Events list type will allow you to create an Events type list of parcels. After creating an Event type list, there is only one Action that can be performed and that is to DELETE Events. The list is interactive, and clicking on a parcel in the list will take you to the selected parcel and opens on the Events tab.



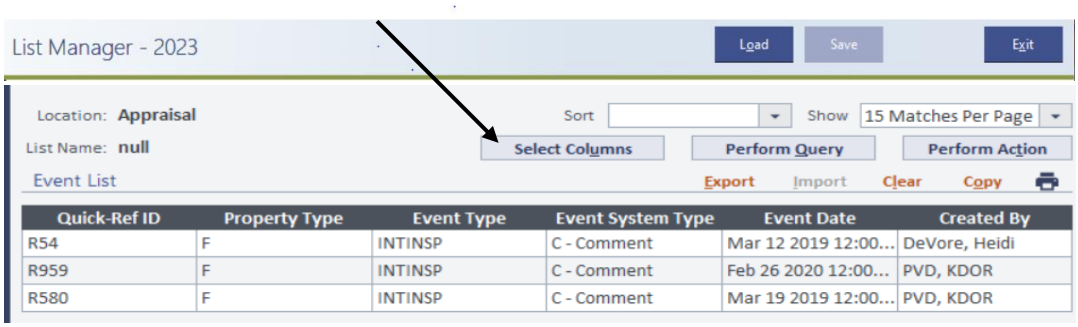
- **Event List** – This option allows the user to use a previously saved Events List. When the user clicks the search icon next to the Event List field, the user then clicks on Select an Existing List, a Load List dialog will launch showing Event Lists saved for that user. If a list is selected, the list name will display in the field. The report generated will now display a list of the events that can be filtered further by using any of the other filter properties.

- **Property List** – This option is similar to the Permit List option that you can Create a New One-time List, Create and Save a New List or use a previously saved Property type list.

- **Event Type** – Indicate the event types to include in the selection criteria. If left blank, all types will be chosen.

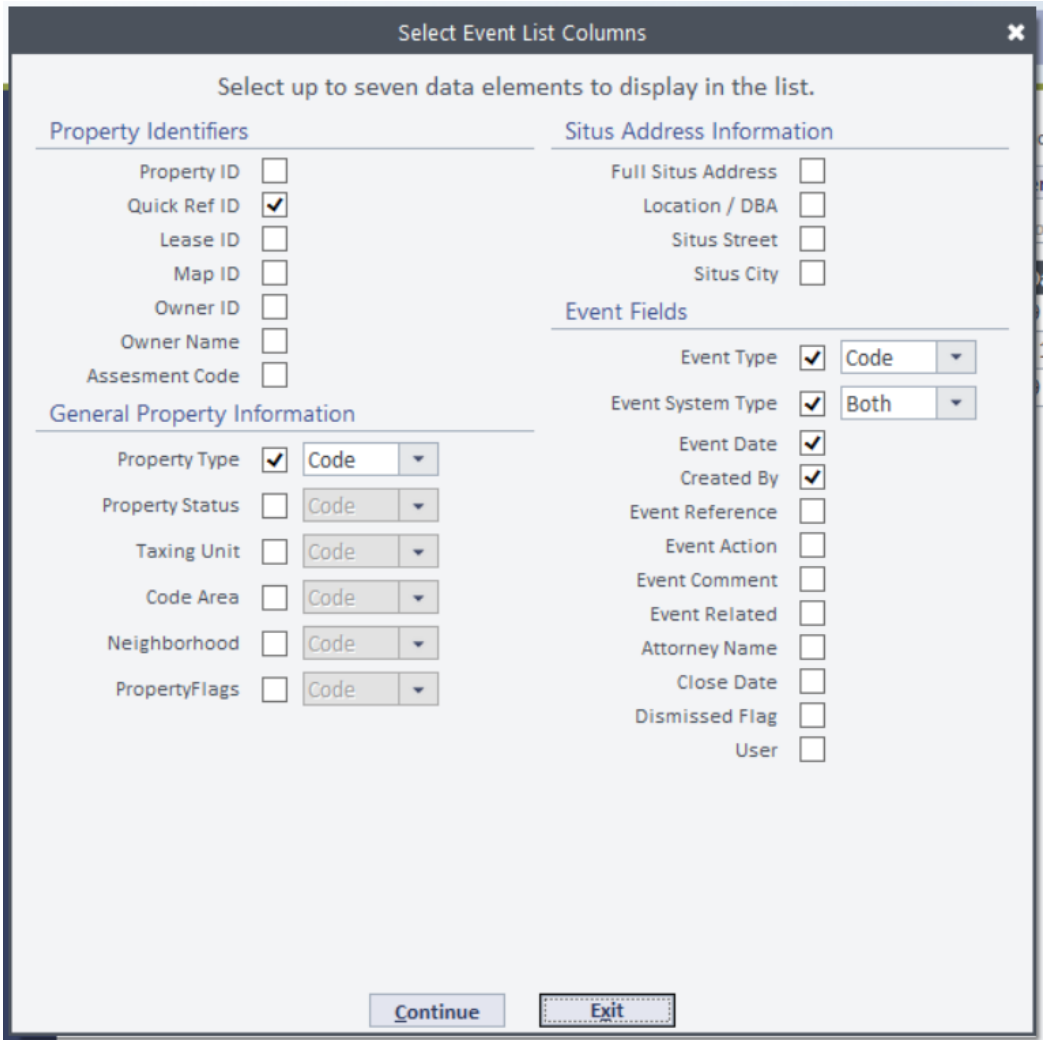
- **Event Date Between** – Choose an event date range. If left blank, event dates will be ignored.

When you have a list created you can change the columns that display by clicking on Select Columns.



Select Events (continued)

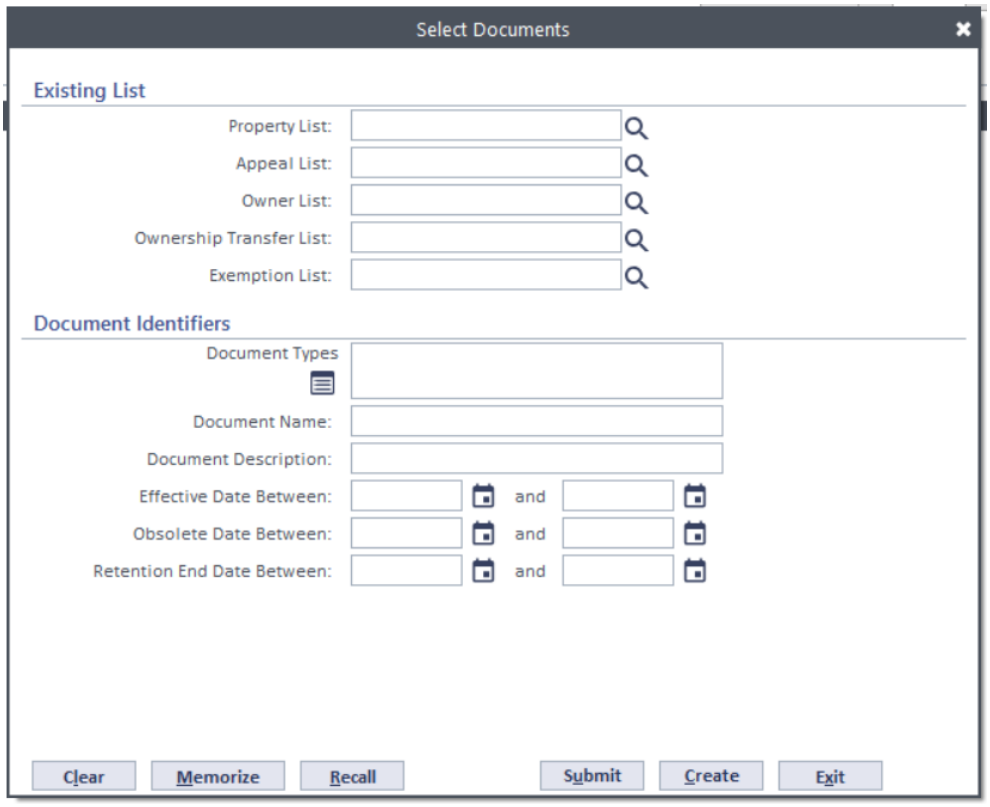
Choices for an **Events type list**. Select up to seven columns to replace the default columns. For code file type selections, you can choose to display the Code, the Description, or Both.



Click Save to save this list with the new columns. If you PRINT this list now, the list will print with the new columns that were chosen.

Select Documents Queries

Select Documents is a new list type and will allow you to create a Documents Type list of parcels. There are no Actions that can be performed. The list can only be exported as a text file which can be imported to an excel workbook. The list is interactive, and clicking on a parcel in the list will take you to the selected parcel and opens in the Documents tab. This Query was made for another jurisdiction. It has limited use for Kansas.



- **Property List** – This option allows the user to use a previously saved Property List. When the user clicks the search icon next to the Property List field, the user clicks on Select an Existing List, a Load List dialog will launch showing Property Type Lists saved for that user. If a list is selected, the list name will display in the field. The report generated will display a list of the properties that can be filtered further by using any of the other filter properties.

- **Appeal List** –This option gives the user the ability to Create a New One-time List, Create and Save a New List or Select an existing appeals type list.

- **Owner List** –This option gives the user the ability to Create a New One-time List, Create and Save a New List or Select an existing Property Owners type list.

- **Ownership Transfer List** – This option gives the user the ability to Create a New One-time List, Create and Save a New List or Select an existing Ownership Transfers type list.

- **Exemption List** – This option gives the user the ability to Create a New One-time List, Create and Save a New List or Select an existing Property Owners type list.

Select Documents (continued)

- **Document Types -** Select the icon next to the field and choose which document types are to be displayed in the results.

- **Document Name –** If the document has a specific name, this can be added to the criteria to narrow the search and results produced.

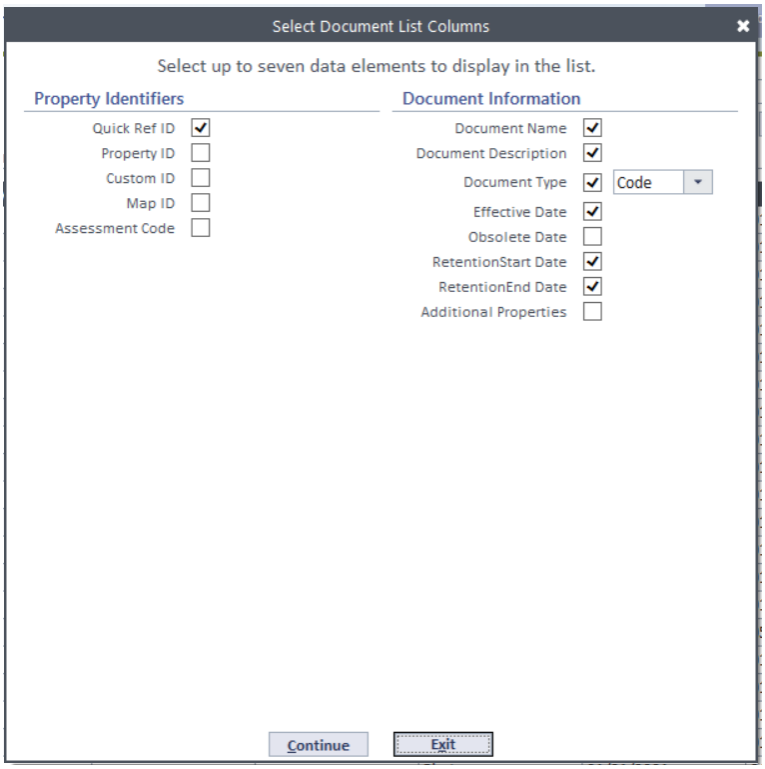
- **Document Description –** Select a description of the document to include in the selection criteria. Caution should be used when adding this to the criteria. If the document does not have a description or the description does not match, then it will be omitted from the results.

- **Effective Date Between** – Choose an effective date range. If left blank, effective dates will be ignored.

- **Obsolete Date Between** – Choose an obsolete date range. If left blank, obsolete dates will be ignored.

- **Retention End Date Between** – Choose a retention date range. If left blank, retention dates will be ignored.

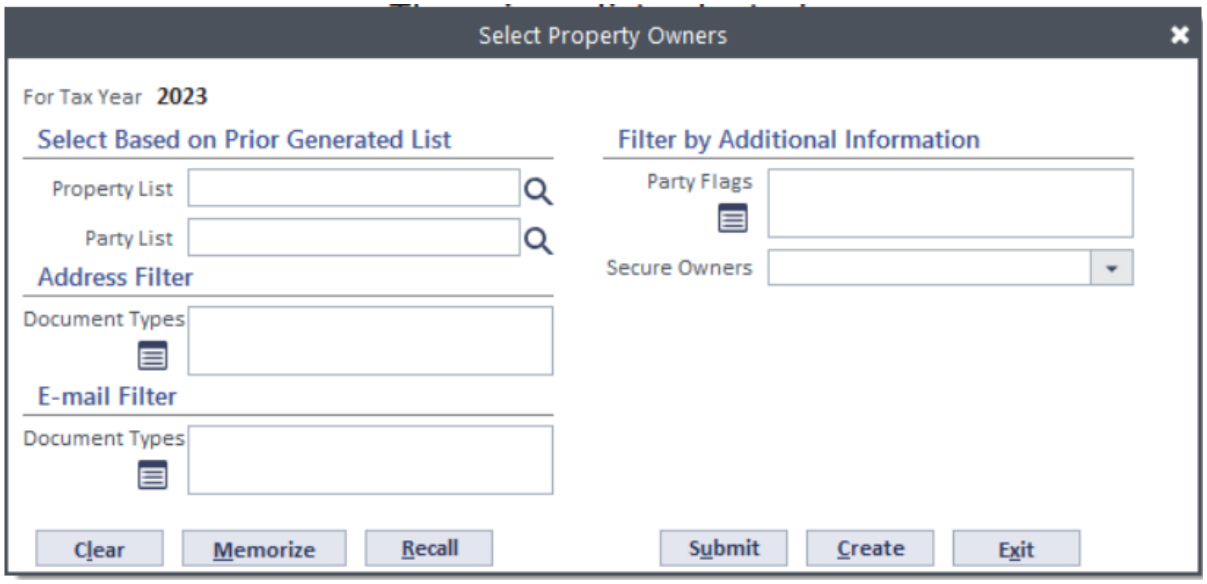
Choices for a **Documents type list**. Select up to seven columns to replace the default columns. For code file type selections, you can choose to display the Code, the Description, or Both.



Click “Save” to save this list with the new columns. If you PRINT this list now, the list will print with the new columns that were chosen.

Select Property Owners Queries

Select Property Owners is a new list type and will allow you to create a Property Owner Type list of parcels. There are no Actions that can be performed. The list can only be exported as a text file which can be imported to an excel workbook. The list is not interactive as other list types. This Query was made for another jurisdiction. There are no Actions that can be performed. The list can be exported as a text file and then imported into Excel.



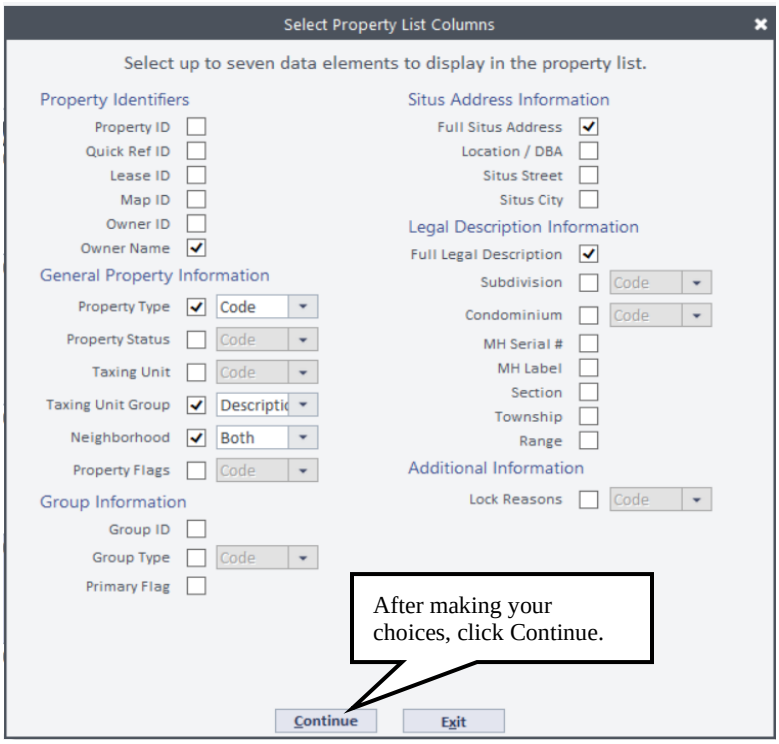
- **Property List** – This option allows the user to use a previously saved Property List. When the user clicks the search icon next to the Property List field, the user can then Select an Existing List, a Load List dialog will launch showing Property Type Lists saved for that user. If a list is selected, the list name will display in the field. The user can also choose to Create a New One-Time List or Create and Save a New List. The report generated will display a list of the properties that can be filtered further by using any of the other filter properties.

- **Party List** –This option gives the user the ability to Create a New One-time List, Create and Save a New List or Select an existing party type list.

- **Document Types –** This is listed under both Address filter and E-mail Filter sections. Select the icon next to the field and choose which document types are to be displayed in the results. This does not seem to function currently in Kansas.

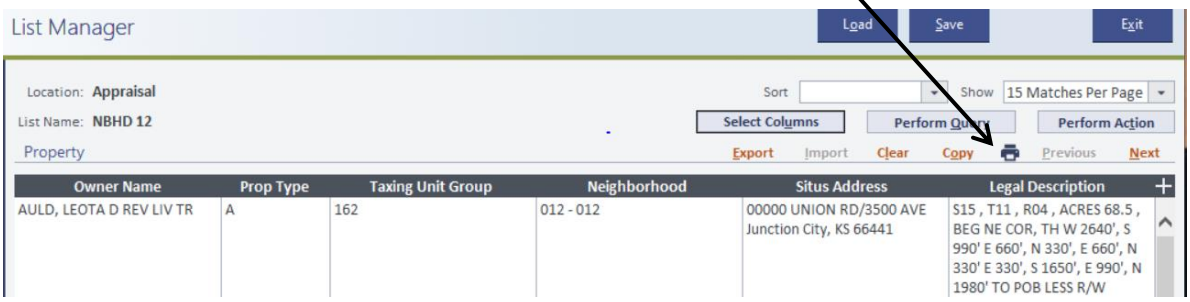
- **Party Flags –** This option filters Party flag codes that have been entered into your county site. Selections may vary.

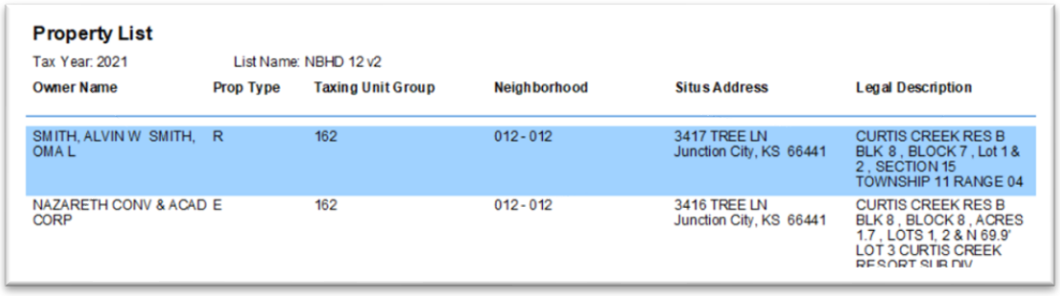
- **Secure Owners –** This option filters the list down to either Secured or Unsecured Owners. If left blank both secured and unsecured owners will be included in the list.



After clicking Continue, the list will now populate with the columns you chose.

Click Save to save this list with the new columns. If you PRINT this list now, the list will print with the new columns that were chosen.





Import a List into List Manager

Use the "**Import"** button to retrieve a **comma-separated values (.csv)** file created with a CRS reporting tool such as the CRS QUERY TOOL program or from queries developed using Access to report data from your CRS database. Important to note is that you will ***NOT*** use the entire query results to import with, no matter what program you use for your query. *List Manager is designed to accept or Import a **single** column of data*, either the PropertyID **OR** QuickRefID for a "Property" type list, the InstanceID of the table or field you are going to mass change for an "Item Page" type list, the AppealID for an "Appeal" type list, the PartyID for a "Party" type list, or the ExemptionID for an "Exemption" type list. To import the file into List Manager, you first have to remove any header row, then save the query or spreadsheet list as a .csv file. List Manager will not allow a list to be imported if there are any duplications in numbers, regardless of which type of list is being created.

If the import fails - Review your list for duplications. Check the first row of the list to make sure there is not a header row. Check to be sure the list was saved as a CSV (comma separated value) type file. Sometimes, doing the "Save As" a second time has worked. Also, make sure the CSV file you saved is CLOSED. You cannot have the file open on your desktop when you try to import it (will get spinning clock).

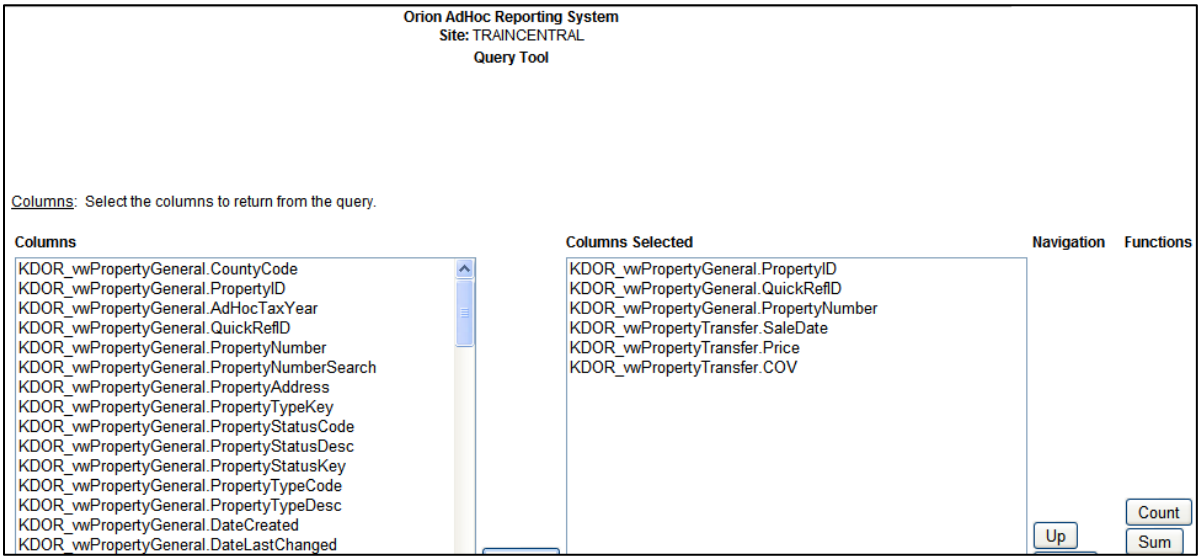
What Column of Data is needed for CSV Import File per List Type?

List Type	**Column Needed for CSV Import File**
Property	PropertyID **OR** QuickRefID
Item Page	InstanceID (from item page that changes are being made)
Appeal	AppealID
Exemption	ExemptionID
Party	PartyID
Permit	PermitID
Events	EventID
Ownership Transfers	OwnershipTransferID
Property Owner	PropertyOwnerID

How to Create a List from the CRS Query Tool and Import into List Manager

Create a Property Type List using the Query Tool

We are wanting to create a Property Type list in List Manager to print batch PRC's. The following is an example of a query ran to identify a list of parcels that recently sold (COV range 014001 thru 014023) so we can print PRC's to take to the field to review the sales.



Where Conditions: Tests to perform in data selection.

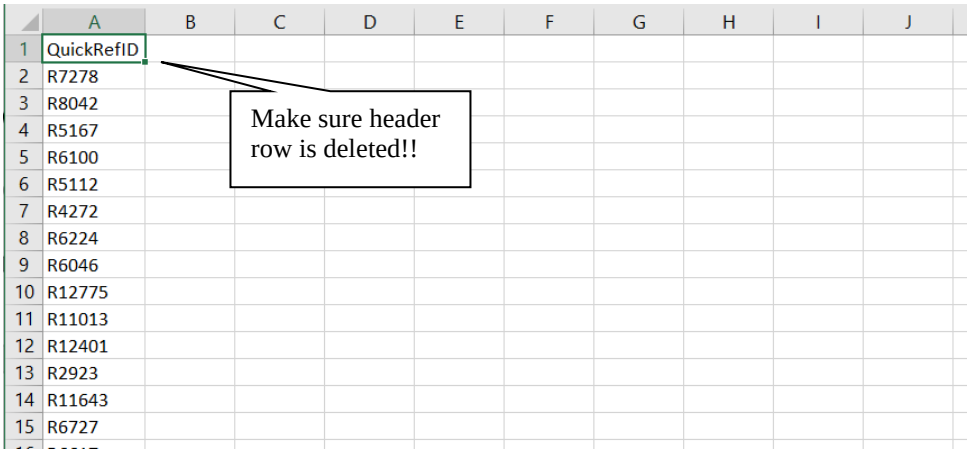
Column	Test	Value	And/Or	Edit	Delete
KDOR_vwPropertyGeneral.AdHocTaxYear	Equals	2021	And	Edit	Delete
KDOR_vwPropertyTransfer.COV	Between	014001,014023	And	Edit	Delete
KDOR_vwPropertyGeneral.AdHocTaxYear	☐ Not Equals		☐ Column And	Add	

With the conditions set, run the query and see if the spreadsheet results look appropriate and correct

	A	B	C	D	E	F
1	PropertyID	QuickRefID	PropertyNumber	SaleDate	Price	COV
2	7278	R7278	021-117-25-0-00-00-001.01-0	11/1/2007 0:00	250000	14001
3	8042	R8042	021-126-23-0-10-01-001.14-1	11/1/2007 0:00	83000	14002
4	5167	R5167	021-114-20-0-20-03-003.00-0	11/1/2007 0:00	6000	14003
5	6100	R6100	021-115-16-0-30-08-010.00-0	11/1/2007 0:00	165000	14004
6	5112	R5112	021-114-20-0-10-01-010.01-0	11/1/2007 0:00	12000	14005
7	4272	R4272	021-112-10-0-00-00-009.01-0	11/1/2007 0:00	500	14006
8	6224	R6224	021-115-16-0-30-21-010.00-0	11/1/2007 0:00	125000	14007
9	6046	R6046	021-115-16-0-30-02-010.00-0	10/1/2007 0:00	14000	14008
10	12775	R12775	021-261-12-0-40-07-001.01-0	11/1/2007 0:00	130000	14009
11	11013	R11013	021-251-02-0-20-06-001.00-0	11/1/2007 0:00	19000	14010
12	12401	R12401	021-261-12-0-30-23-002.00-0	11/1/2007 0:00	37000	14011
13	2923	R2923	021-099-31-0-00-00-004.00-0	11/1/2007 0:00	172000	14012
14	11643	R11643	021-261-11-0-30-04-013.00-0	11/1/2007 0:00	29000	14013

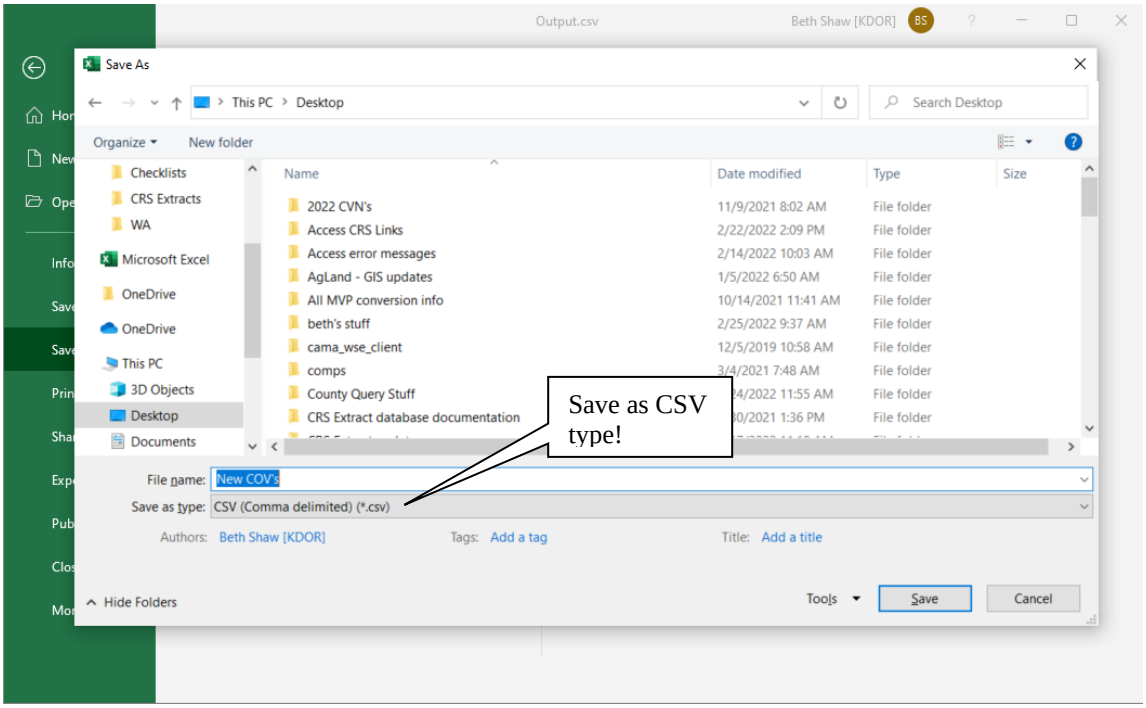
Create a Property Type List using the Query Tool (continued)

Next, delete all the columns except the PropertyID OR QuickRefID. We will use QuickRefID in this example. Remove the header row as well and filter out duplicate numbers.



	A	B	C	D	E	F	G	H	I	J
1	QuickRefID									
2	R7278									
3	R8042									
4	R5167									
5	R6100									
6	R5112									
7	R4272									
8	R6224									
9	R6046									
10	R12775									
11	R11013									
12	R12401									
13	R2923									
14	R11643									
15	R6727									

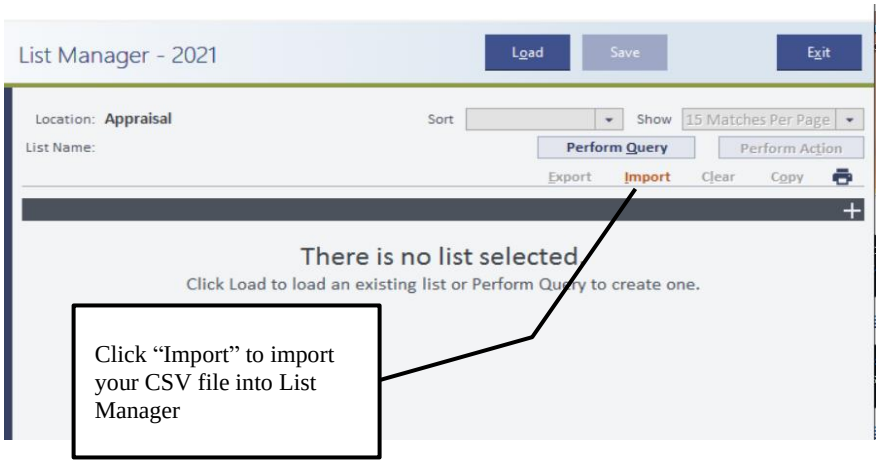
When you have your list filtered, you will perform a “Save As” and ensure your list is in CSV (Comma Delimited) format.



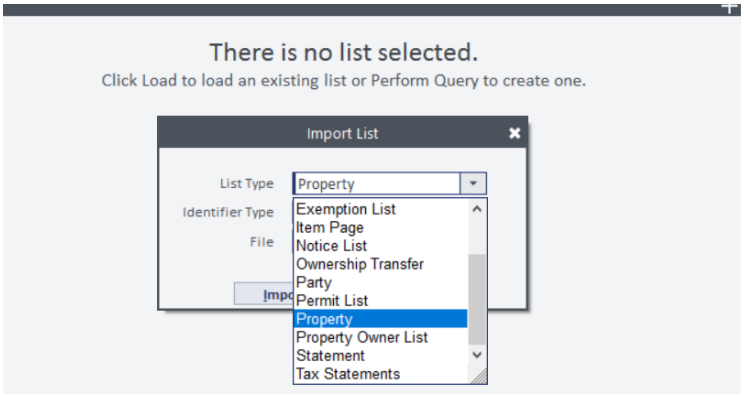
Close this CSV Import file.

Create a Property Type List using the Query Tool (continued)

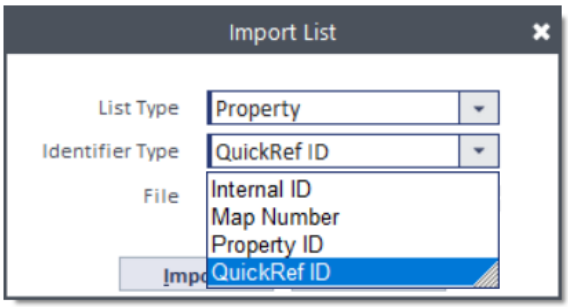
Now you are ready to open List Manager and select “Import”.



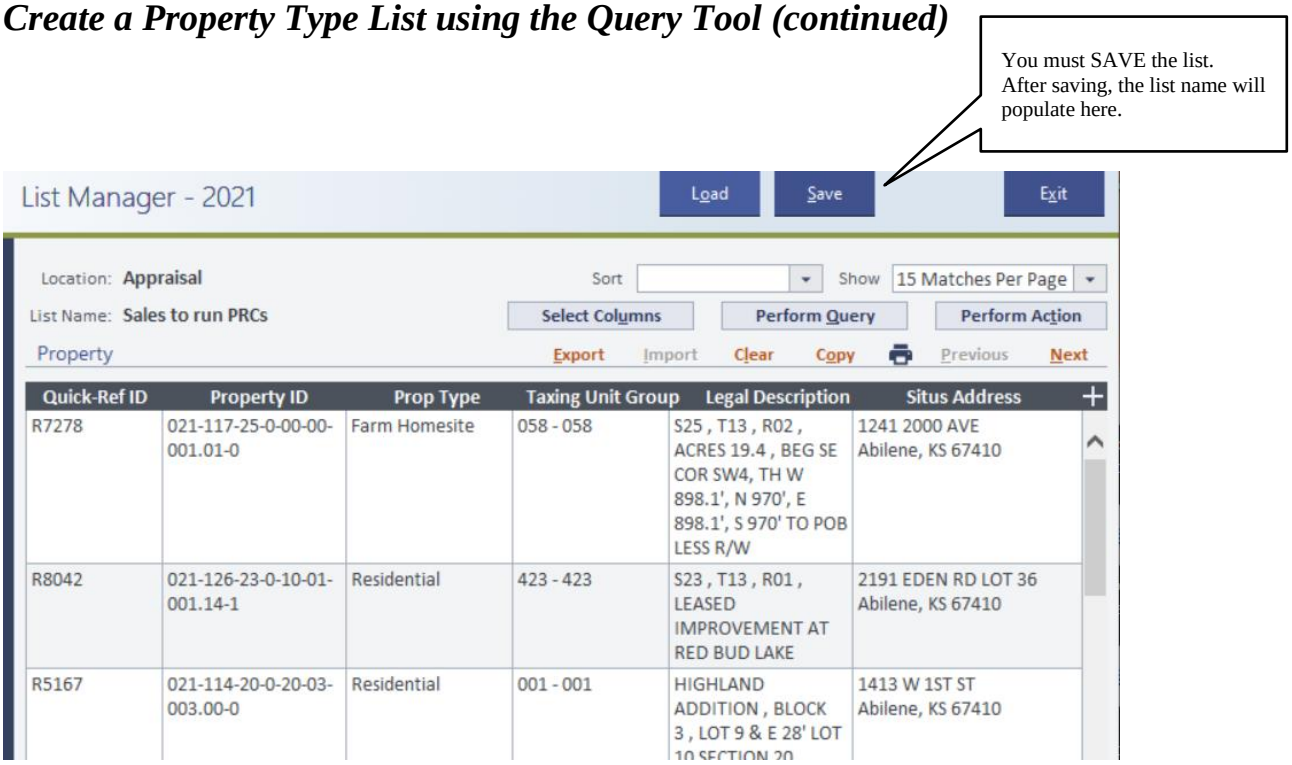
In our example, we want “Property” as List Type.



The Identifier Type, for a Property Type list only, you will have four choices, InternalID, Map Number, Property ID, or QuickRefID. For this example, click on “QuickRefID” as that is the column, we saved in our import file. If you save the PropertyID column instead, then choose “InternalID” as your Identifier Type as Property ID does not function. For File, select the search icon to browse the user’s PC for the CSV file just saved. Once selected, click Import, and the list will begin to load. Once loaded the list must be saved.



Create a Property Type List using the Query Tool (continued)

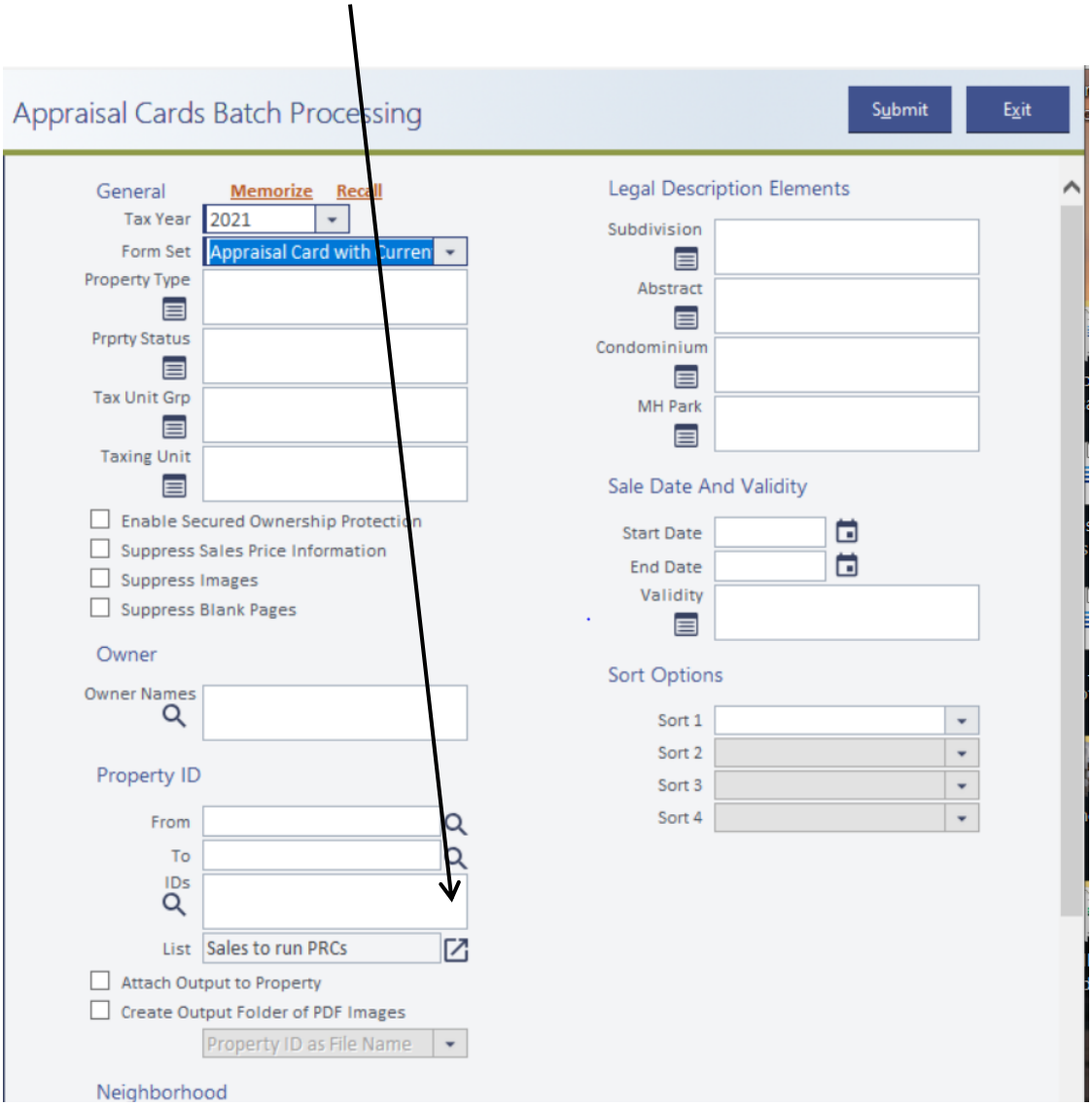


You have now imported and saved your Property Type list. We are now ready to use this list to run batch PRC's. Exit out of List Manager.

Run Appraisal Cards using the Property Type List created using the Query Tool

Click on Activities in the menu bar. Then select Run Appraisal Cards.

Select Tax Year and Form Set (required fields).
Under the PropertyID header is a field called “List”. Click on the browse button to the right of this field and select the list you just created in List Manager (the list you just created should be on top).

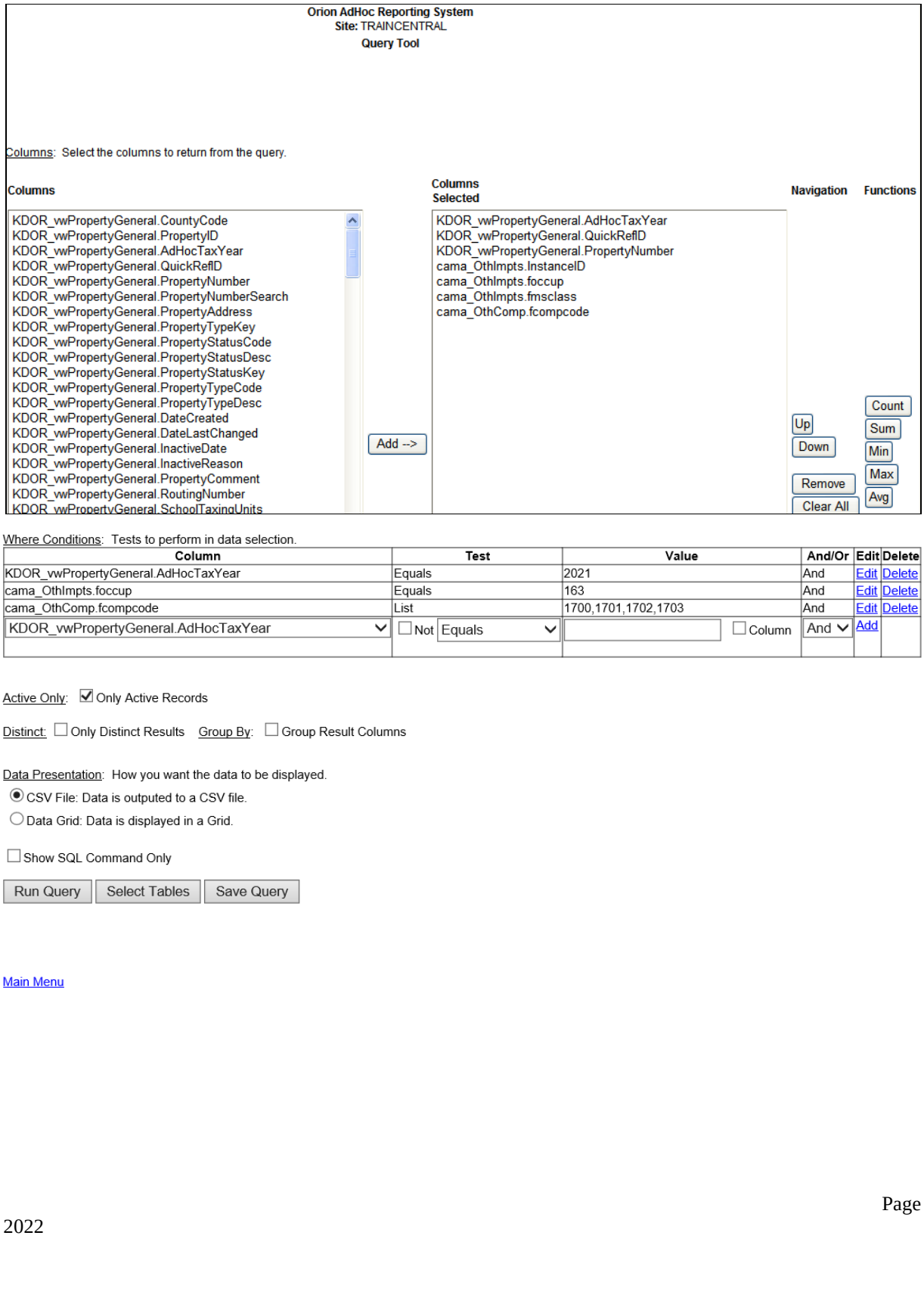


Click Submit. This will now go to the job queue, and after it is done running, open the job in job history, and you will be able to save/print the PRC’s for all the parcels in the list you created in List Manager.

As the list you created is a Property Type list, you can use this same list for many different things, such as running a batch calculation job, running Comp Sheets, running Cost Reports, etc.

Create an Item Page type List using the Query Tool

The following is an example of a query ran to identify a list of Other Improvements with an occupancy code of 163 which included steel grain bin components. In this example, we want to include the Other Improvements InstanceID as one of the columns selected since we are changing the Marshall Swift construction class to an “S” for all parcels that have grain bin components.



Orion AdHoc Reporting System
Site: TRAINCENTRAL
Query Tool

Columns: Select the columns to return from the query.

Columns		Columns Selected	Navigation	Functions
KDOR_vwPropertyGeneral.CountyCode KDOR_vwPropertyGeneral.PropertyID KDOR_vwPropertyGeneral.AdHocTaxYear KDOR_vwPropertyGeneral.QuickRefID KDOR_vwPropertyGeneral.PropertyNumber KDOR_vwPropertyGeneral.PropertyNumberSearch KDOR_vwPropertyGeneral.PropertyAddress KDOR_vwPropertyGeneral.PropertyTypeKey KDOR_vwPropertyGeneral.PropertyStatusCode KDOR_vwPropertyGeneral.PropertyStatusDesc KDOR_vwPropertyGeneral.PropertyStatusKey KDOR_vwPropertyGeneral.PropertyTypeCode KDOR_vwPropertyGeneral.PropertyTypeDesc KDOR_vwPropertyGeneral.DateCreated KDOR_vwPropertyGeneral.DateLastChanged KDOR_vwPropertyGeneral.InactiveDate KDOR_vwPropertyGeneral.InactiveReason KDOR_vwPropertyGeneral.PropertyComment KDOR_vwPropertyGeneral.RoutingNumber KDOR_vwPropertyGeneral.SchoolTaxingUnits	Add -->	KDOR_vwPropertyGeneral.AdHocTaxYear KDOR_vwPropertyGeneral.QuickRefID KDOR_vwPropertyGeneral.PropertyNumber cama_OthImpts.InstanceID cama_OthImpts.foccup cama_OthImpts.fmsclass cama_OthComp.fcompcode	Up Down Remove Clear All	Count Sum Min Max Avg

Where Conditions: Tests to perform in data selection.

Column	Test	Value	And/Or	Edit	Delete
KDOR_vwPropertyGeneral.AdHocTaxYear	Equals	2021	And	Edit	Delete
cama_OthImpts.foccup	Equals	163	And	Edit	Delete
cama_OthComp.fcompcode	List	1700,1701,1702,1703	And	Edit	Delete
KDOR_vwPropertyGeneral.AdHocTaxYear	Not Equals	Column	And	Add	

Active Only: Only Active Records

Distinct: Only Distinct Results Group By: Group Result Columns

Data Presentation: How you want the data to be displayed.

CSV File: Data is outputed to a CSV file.

Data Grid: Data is displayed in a Grid.

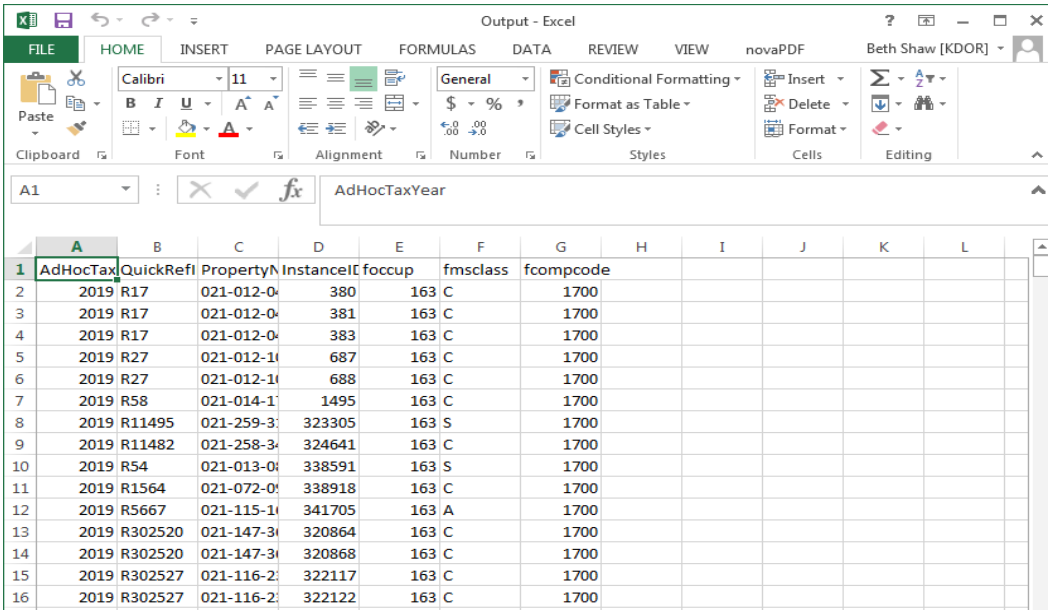
Show SQL Command Only

Run Query | Select Tables | Save Query

Main Menu

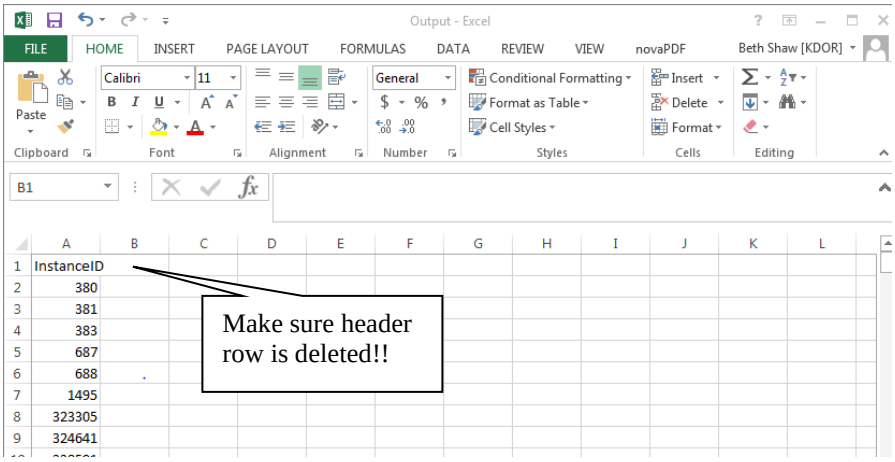
Create an Item Page List using the Query Tool (continued)

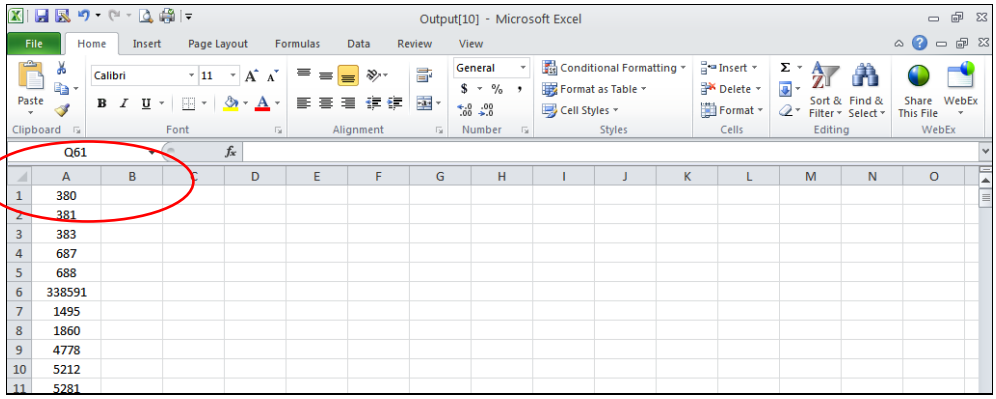
With the conditions set, run the query and see if the spreadsheet results look appropriate and correct.



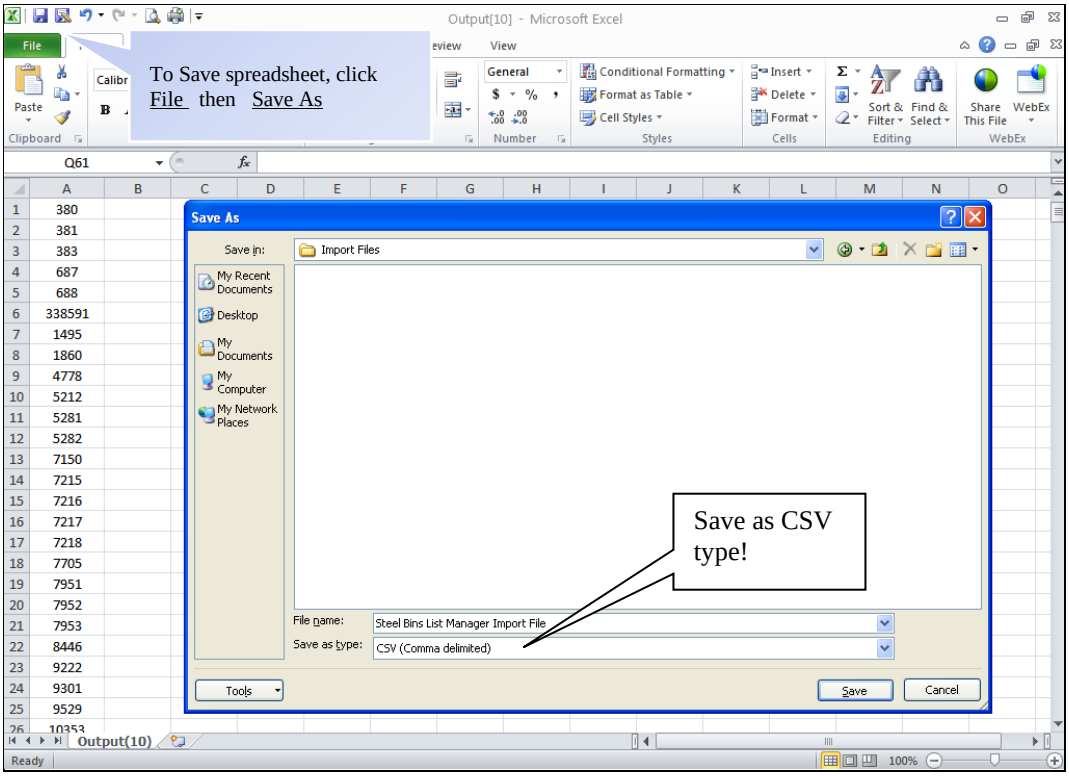
	A	B	C	D	E	F	G
1	AdHocTax	QuickRefI	PropertyN	InstanceID	foccup	fmsclass	fcompcode
2	2019	R17	021-012-0	380	163	C	1700
3	2019	R17	021-012-0	381	163	C	1700
4	2019	R17	021-012-0	383	163	C	1700
5	2019	R27	021-012-1	687	163	C	1700
6	2019	R27	021-012-1	688	163	C	1700
7	2019	R58	021-014-1	1495	163	C	1700
8	2019	R11495	021-259-3	323305	163	S	1700
9	2019	R11482	021-258-3	324641	163	C	1700
10	2019	R54	021-013-0	338591	163	S	1700
11	2019	R1564	021-072-0	338918	163	C	1700
12	2019	R5667	021-115-1	341705	163	A	1700
13	2019	R302520	021-147-3	320864	163	C	1700
14	2019	R302520	021-147-3	320868	163	C	1700
15	2019	R302527	021-116-2	322117	163	C	1700
16	2019	R302527	021-116-2	322122	163	C	1700

Delete all the columns except the InstanceID column. Remove the header row and filter out duplicate numbers.





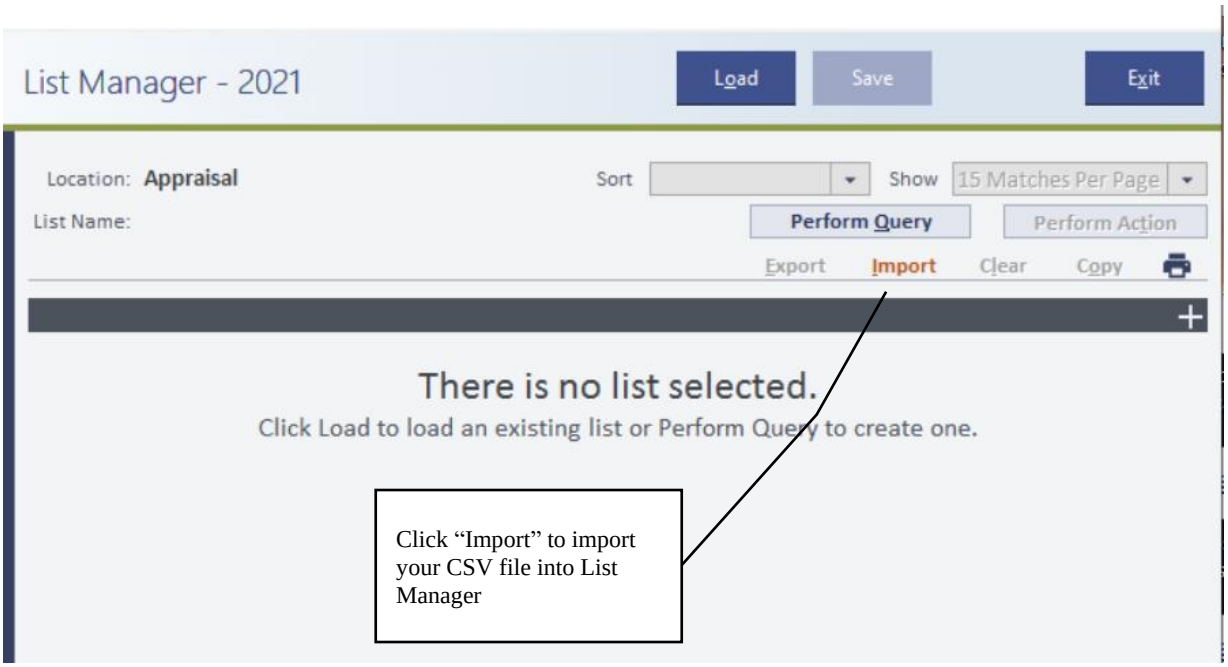
Create an Item Page List using the Query Tool (continued)



When you have your list filtered, you will perform a “Save As” and ensure your list is saved as a CSV (Comma Delimited) type file.

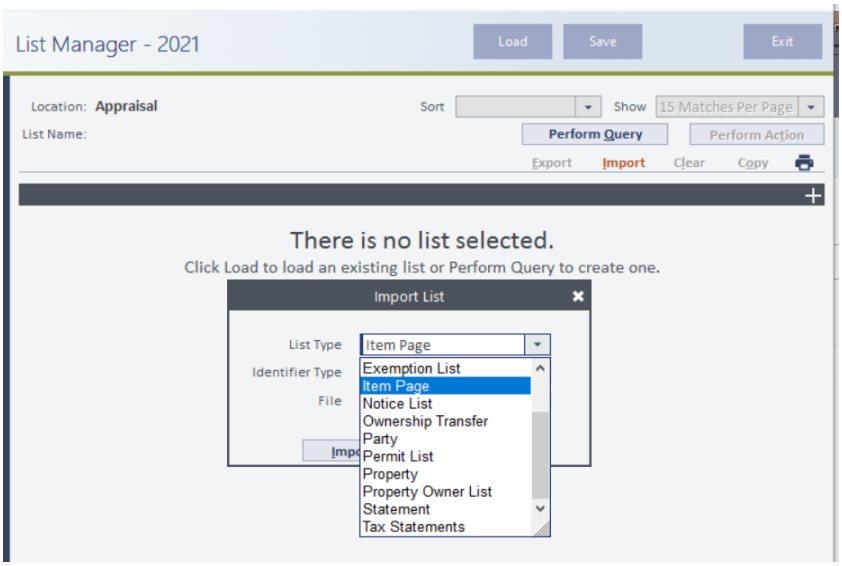
Close the CSV Import file.

Now you are ready to open List Manager and select “Import”.

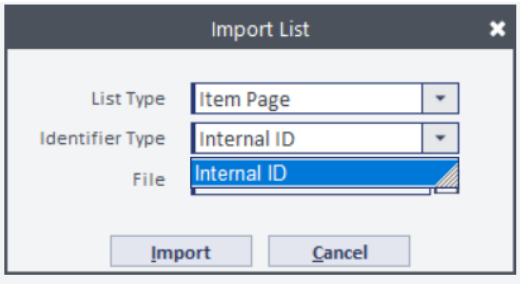


Create an Item Page List using the Query Tool (continued)

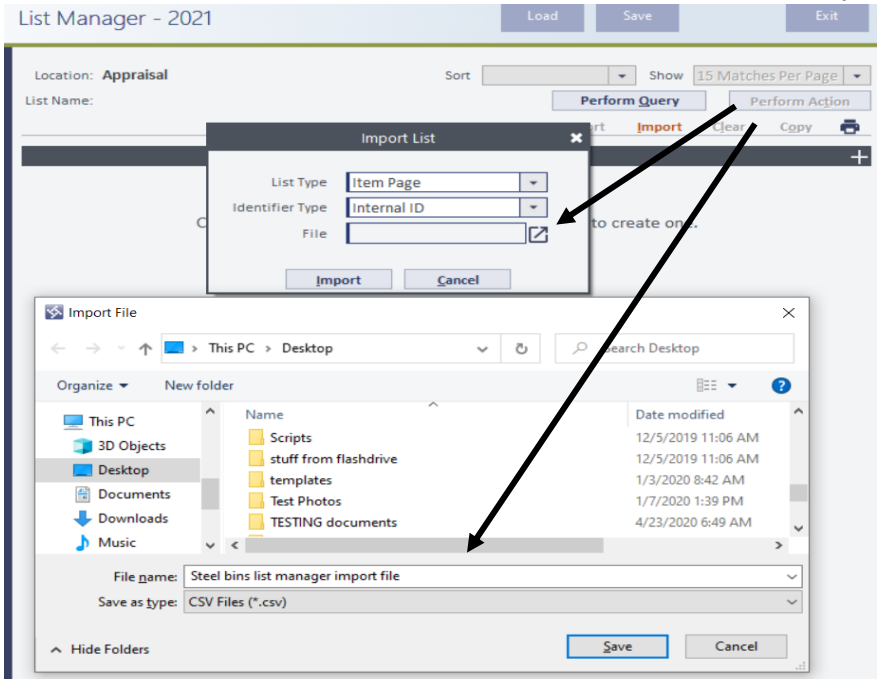
In our example, we want “Item Page” as List Type, since we are using Item Page InstanceID’s, and we want to make a mass update change to our Orion data.



For the Identifier Type, click on “InternalID” (only choice).

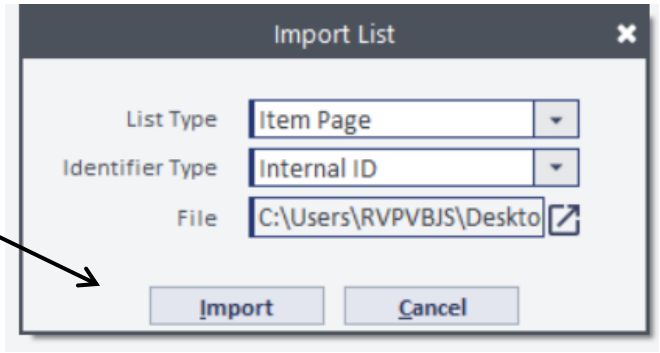


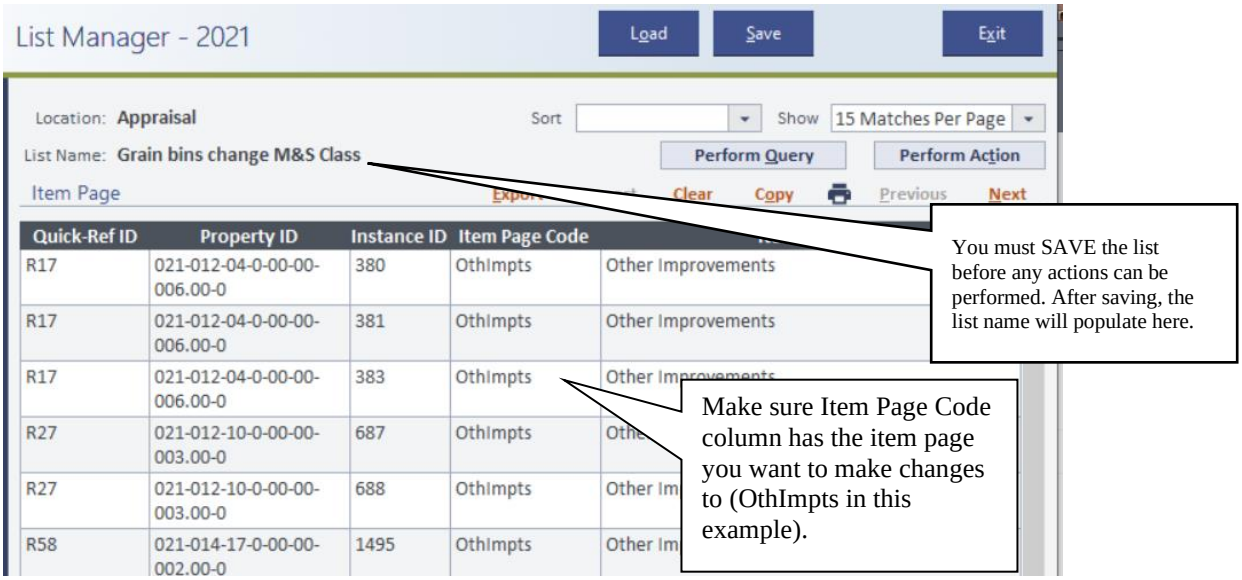
For File, select the search icon to browse the user’s PC for the CSV file you just saved.



Create an Item Page List using the Query Tool (continued)

Once selected, click Import, and the list will begin to load

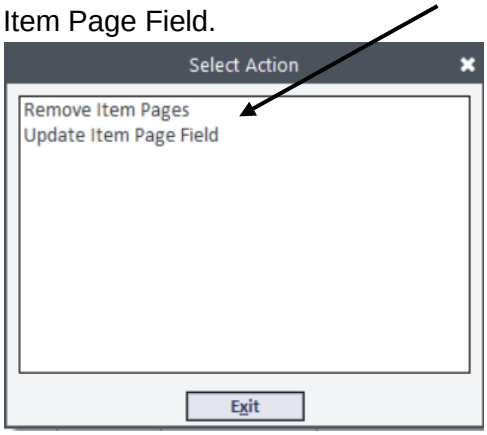




Once loaded, the list will appear as above. After saving the list, we can perform the mass updates to the CAMA fields.

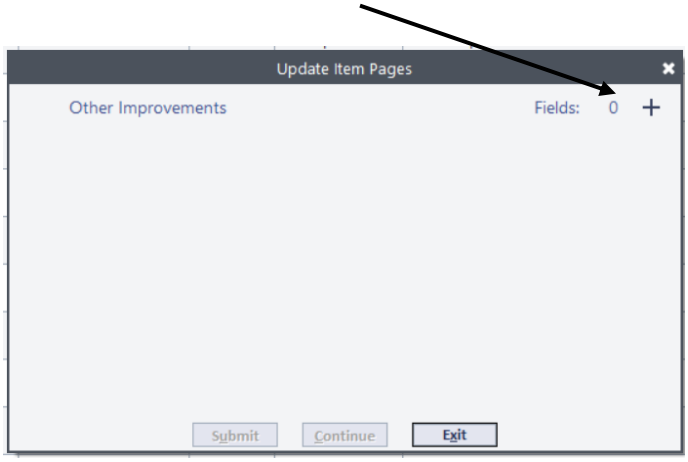
Update Item Page fields using an Item Page Type List ***created using the Query Tool***

Click Perform Action - then Update Item Page Field.

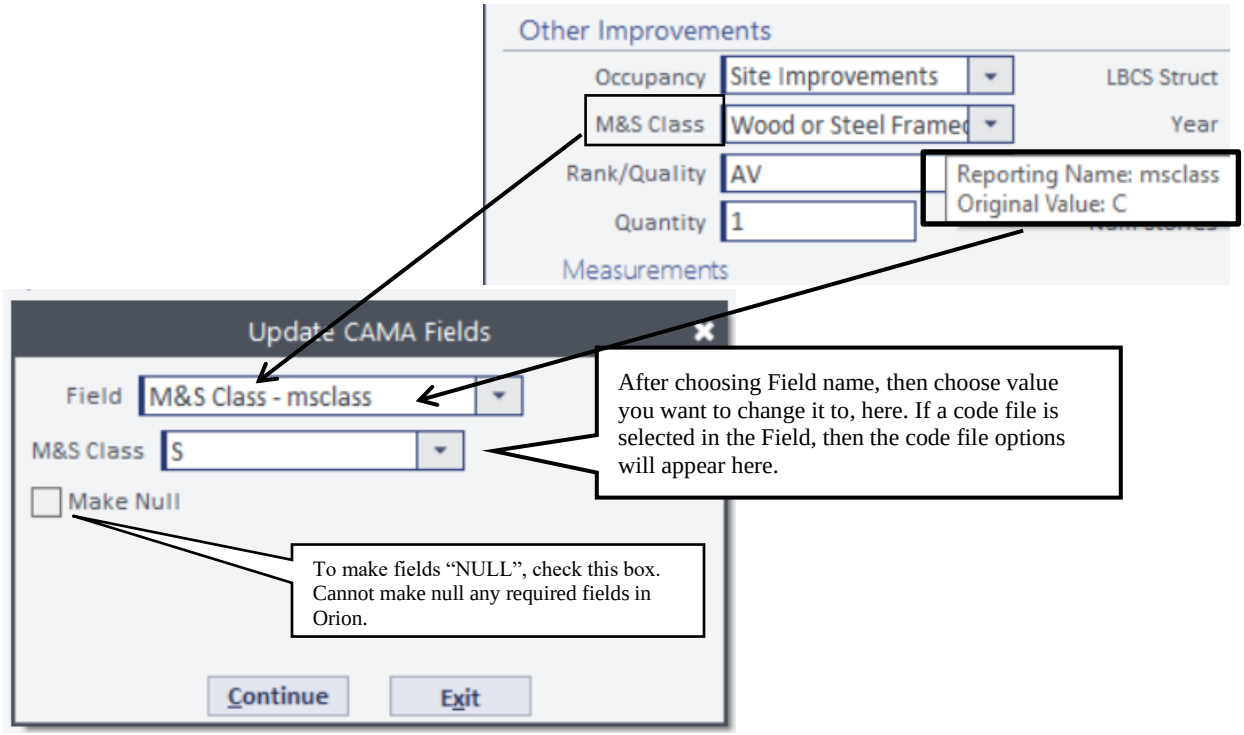


Update Item Page fields with Item Page Type List created using the Query Tool (continued)

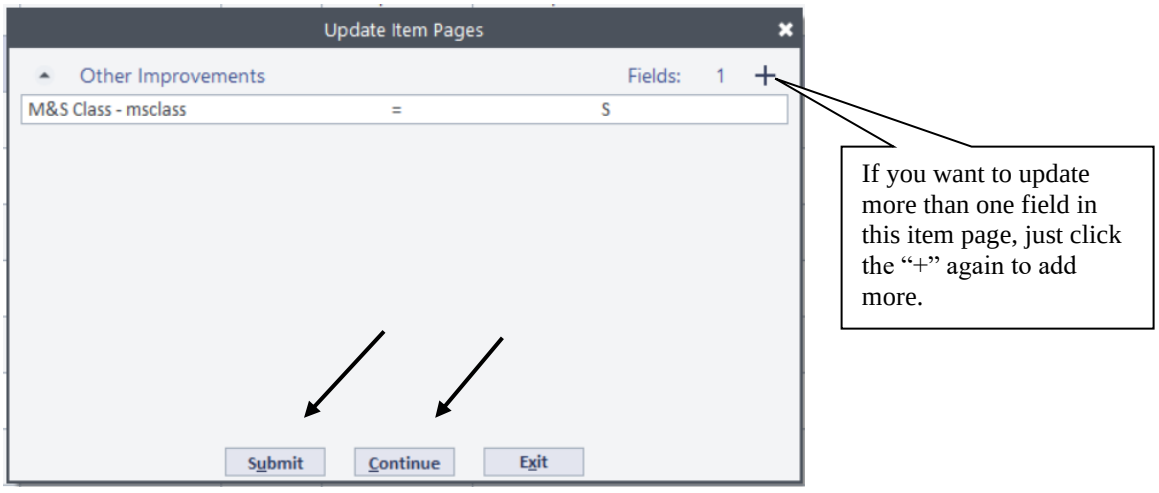
Next click the plus sign (+) to add a new field to update.



Click on the drop-down box to find the field to update.
***NOTE**: The fields to choose in the drop-down box will be populated with either **Display** or **Label** name **AND ALSO,** the **Field or Reporting Name**.*

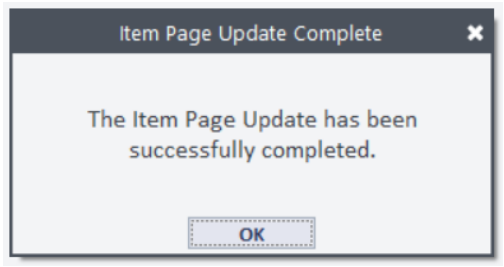


Update Item Page fields with Item Page Type List created using the Query Tool (continued)



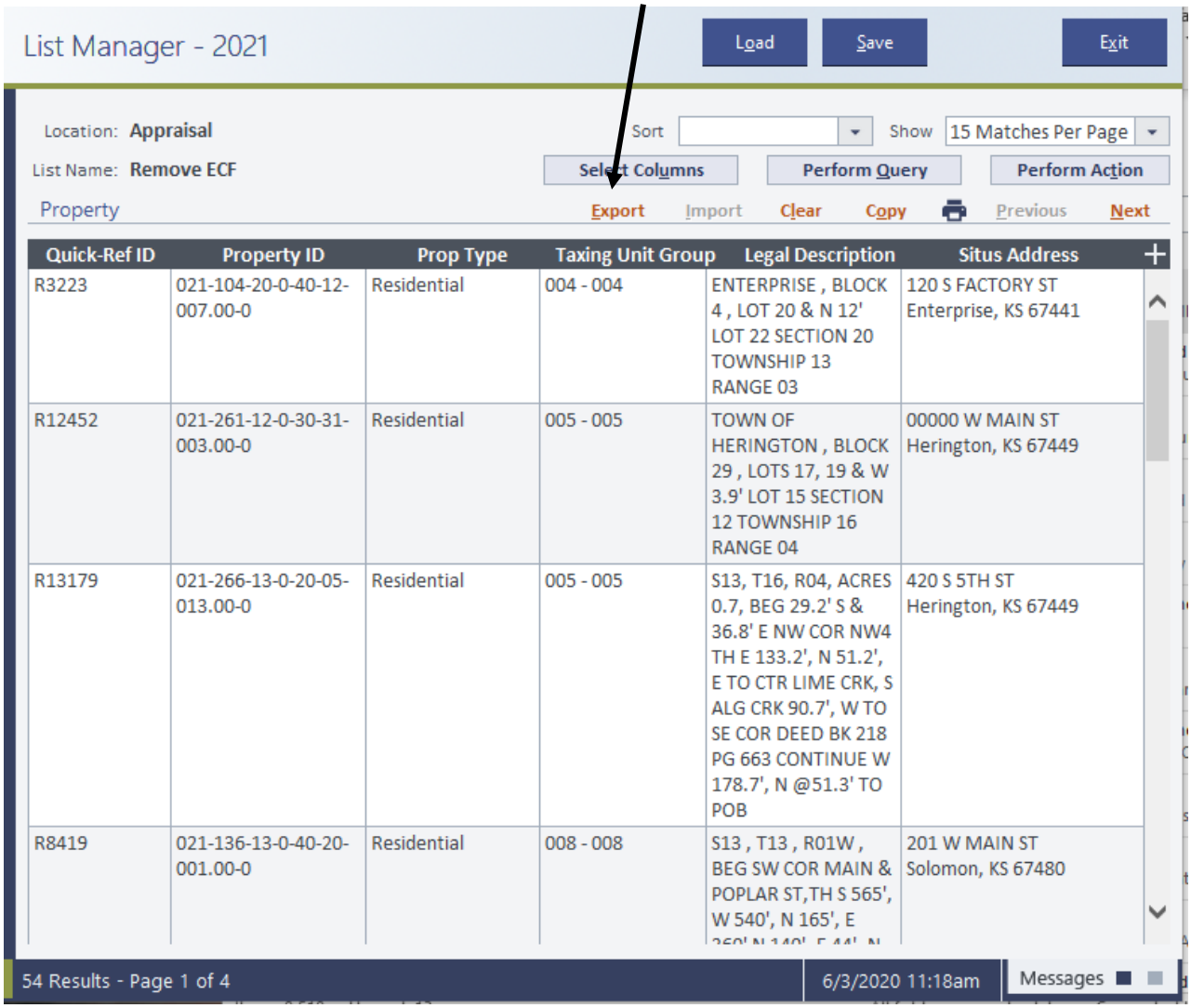
Choose **Submit** to take it to the Job Queue or **Continue** to make the change immediately.

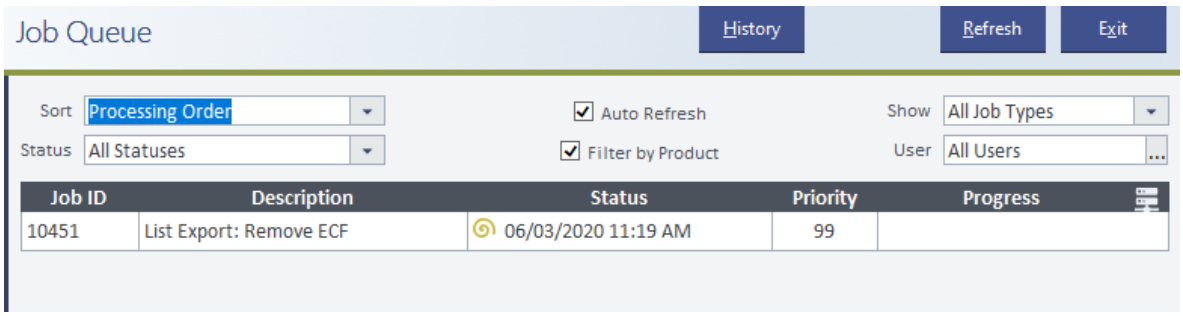
When selecting "Continue", after the fields have been changed, a message will pop up stating the changes have been successfully completed.



Exporting Lists

You can export any list in List Manager as a **comma-separated values** (.csv) or **text** (.txt) file. With the saved list loaded, simply click the orange shaded "**Export" option** (or ALT+E) at the top of the list to automatically send the list to the Job Queue.

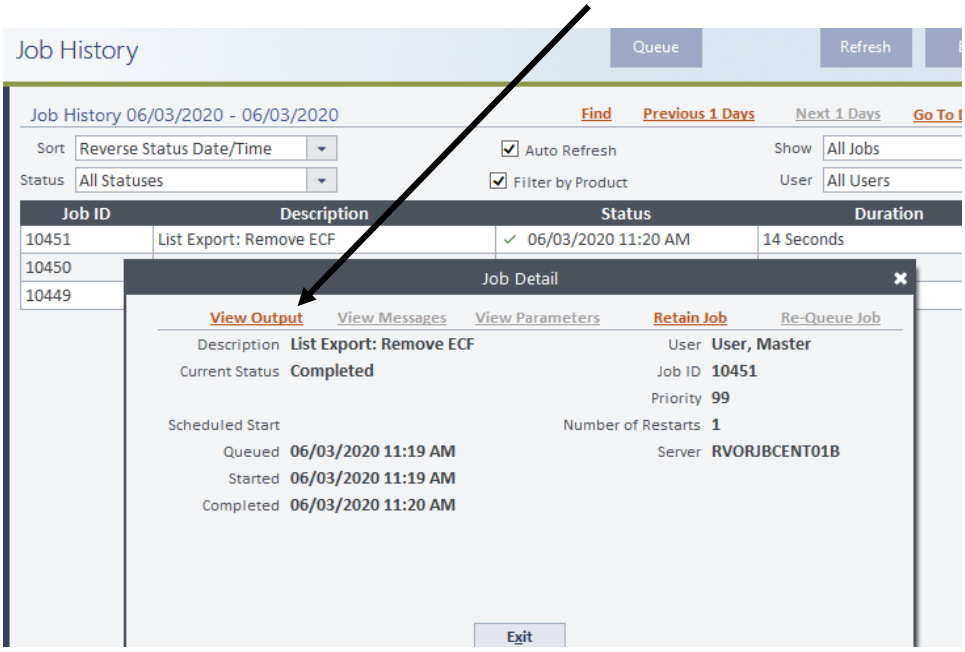




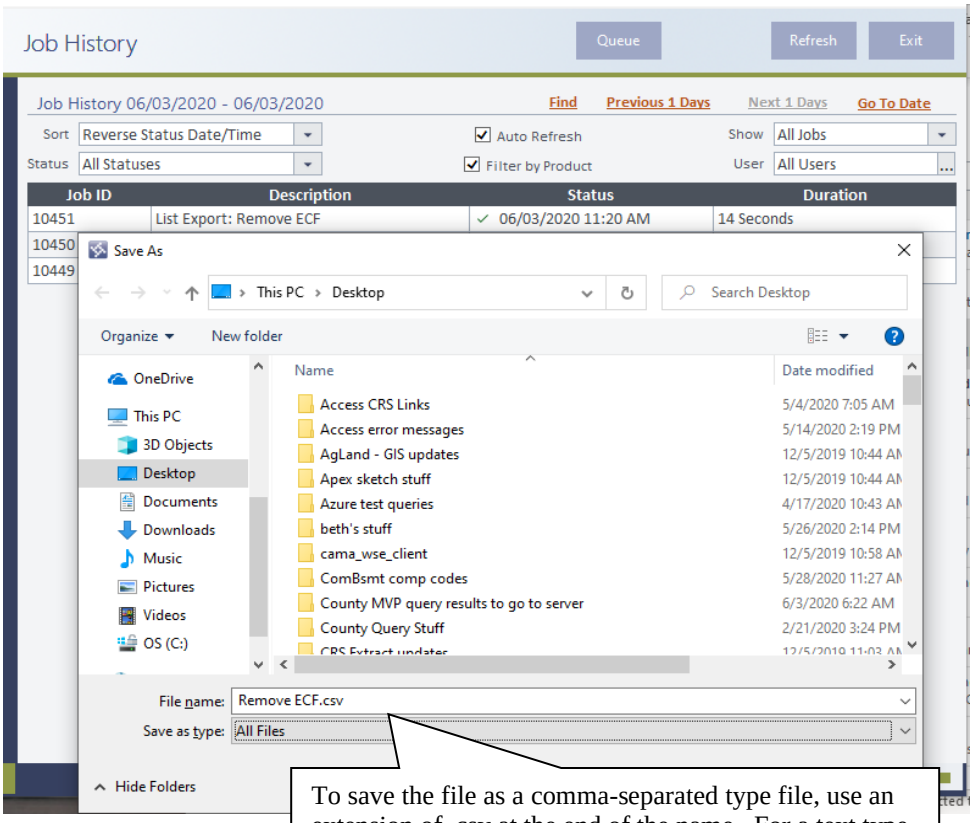
When it has finished processing, you can access the **Job History** page and save the exported list.

Exporting Lists (continued)

Click on the job. The Job Detail box will pop up. Select View Output.



To save the exported list as a comma-separated values (.csv) file, when naming the export file simply give the file name an extension of ".csv". To save the exported list as a text (.txt) file, give the file name an extension of ".txt". The "Save as type" can stay with the default value for either (.csv or .txt) types of files.



Performing Actions in List Manager

When working with list Manager, you must create and Save a list of properties before performing the available actions. Once a list of properties has been loaded or created, click **Perform Action** to access the **Select Action** dialog box. If there is only one action associated with the list type, List Manager automatically performs the associated action. If there is more than one action associated with the list type in the **Select Action** dialog box, and you need to choose which action to perform.

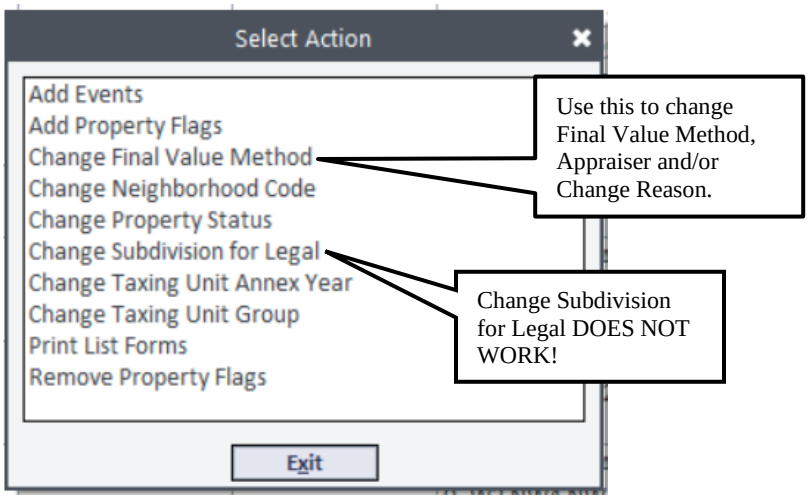
The actions you can perform depend on the list type you are viewing. As was previously mentioned, if you create an **Item Page** type list, the actions you could take include mass update functions such as updating any data entered field on item pages in the Appraisal tab Orion. If you create a **Property** type list, the actions you can perform include changing NBHD codes, changing final value methods, appraiser and/or change reasons, and adding/removing Property Flags. If you create an **Appeal** type list, you can make mass updates to appeals, or use this same list to run group appeal reports.

When you submit an action through List Manager, a successful message is displayed if the action completed without errors. However, if the action could not be completed, an **Incomplete [Action]** dialog box is displayed. This dialog box lists the items for which the action could not be completed. Click **Print** (ALT+P) to print this list for reference.

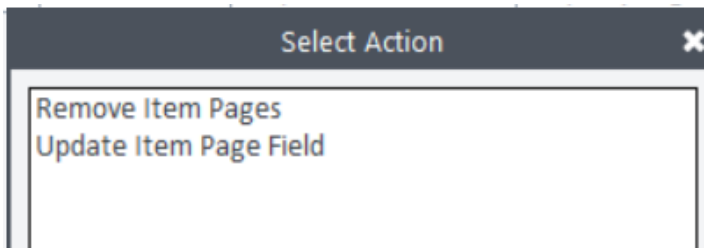
If you submit an action through the job processor, you need to access that job in the Job History to view any errors that occurred.

Examples of Actions that can be Performed by List Type

Property list



Item Page list



Remove Item Pages

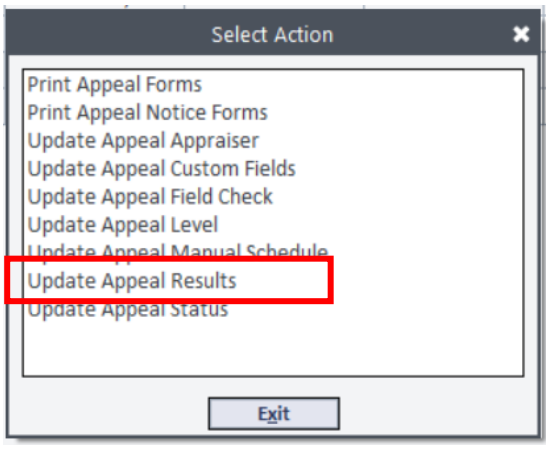
Use same procedure as below, only select **Remove Item Pages.** This will delete all item pages in the list, including all "child" records of that item page if any.

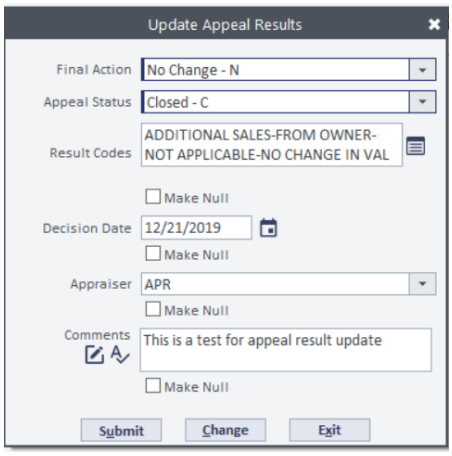
Update Item Page Fields

From the List Manager page, click **Perform Action** (ALT+T) while viewing an Item Page type list. When you click this button, a dialog box appears asking to select an Action, either to **Remove Item Pages** or **Update Item Page Field**. After choosing **Update Item Page Field**, the **Update Item Pages** dialog box appears. Click the "+" sign to open the **Update CAMA Fields** dialog box and select the **Field** (will display the label name, not actual CRS field name) in the item page you want to update. After you add a field, the field name as well as the information you are updating is now displayed under the appropriate header on the **Update Item Pages** dialog box. Continue adding field information as necessary by clicking the "+" sign. When you are ready to update the item page fields, click **Continue** (ALT+C) to automatically update the fields through List Manager, or click **Submit** (ALT+U) to send the update through the job processor.

Different options are available for every item page. Basically, you can update any data-entered field from any item page on the Appraisal tab.

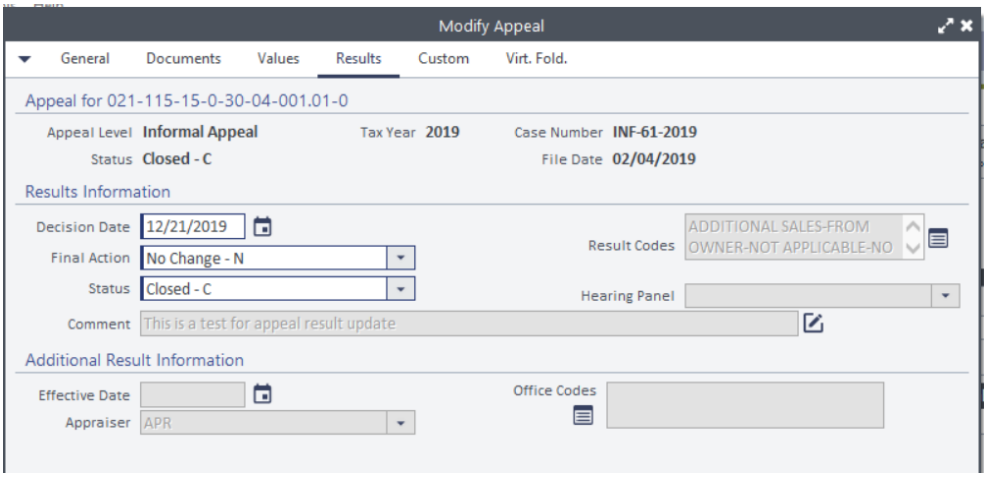
Appeals





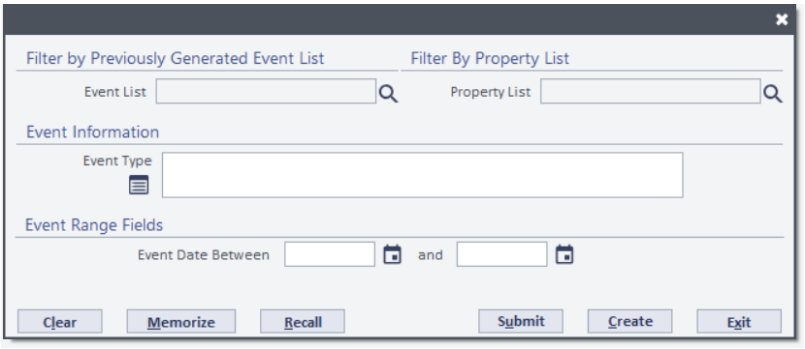
Examples of Actions that can be Performed by List Type (continued)

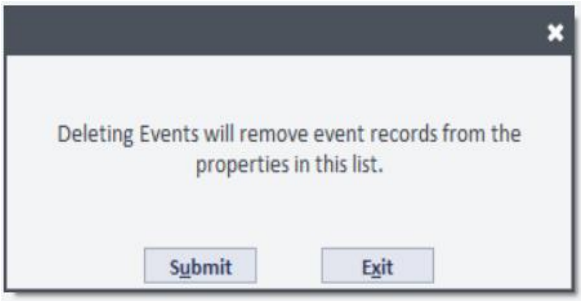
The ability to update appeal results was changed as of 2019. There are more areas that can be updated as well as the ability to clear fields by using any or all of the “Make Null” check boxes.



Example of updated information on an appeal after running using Update Appeals Results

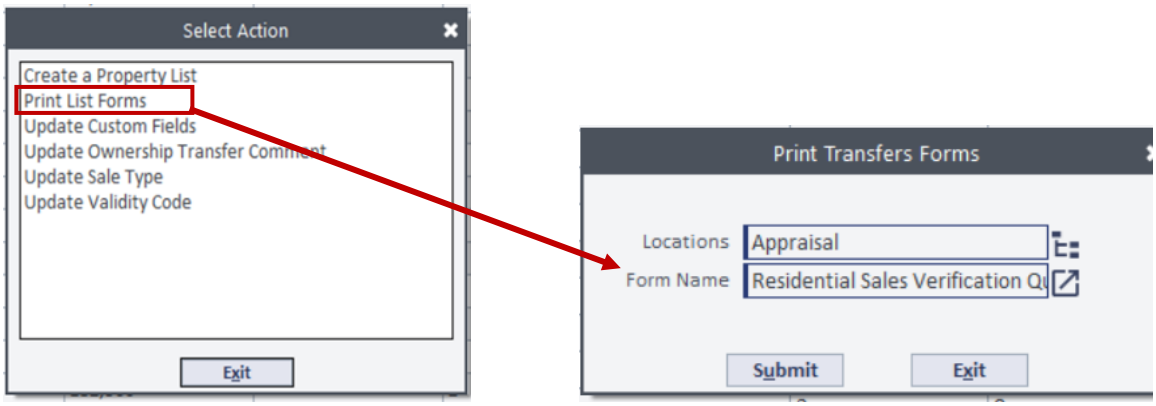
Events



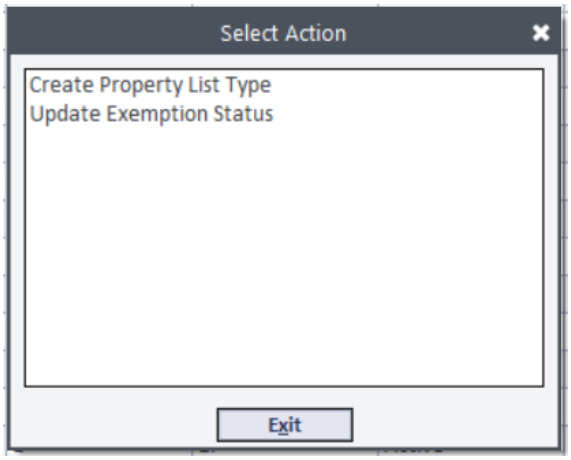


Select Events will allow you to create an Events type list of parcels. After creating an Event type list, there is only one Action that can be performed and that is to DELETE Events. The list is interactive, and clicking on a parcel in the list will take you to the parcel and opens on the Events tab.

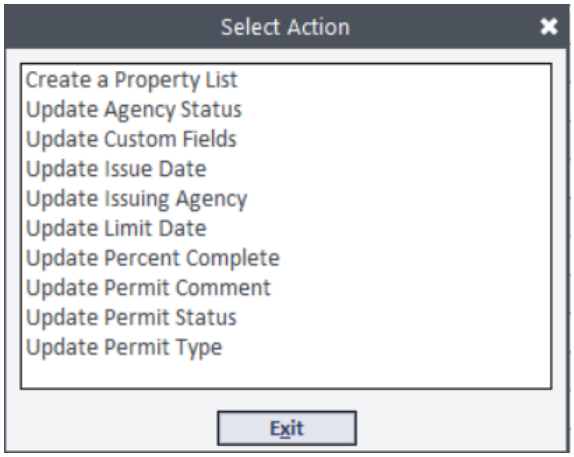
Ownership Transfers



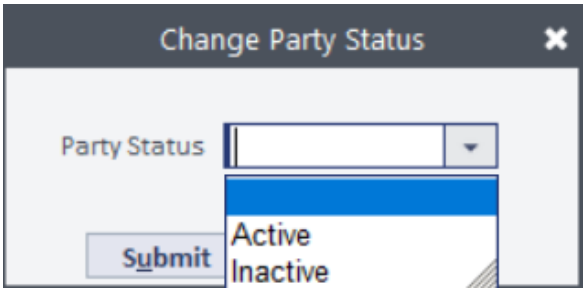
Exemptions



Permits



Party list



Use Party type list to change the Owner's status to Active or Inactive. The list would be created using the Party Reports from the Reporting section in the Menu.