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UAD Workflow: Did your vendor get it right?

We've had our UAD compliant solutions for WinTOTAL Aurora and TOTAL 2011 out for a while now, but realized we never took the time to explain why we designed our solution to work like it does. Now that other formfillers are starting to put out more information about their unreleased solutions, we wanted to show you exactly why you're going to like UAD formfilling better with our products.

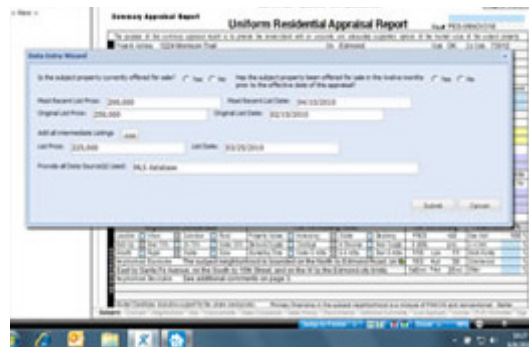
When we started working on the UAD project last year, we developed several prototypes. As we evaluated each one, our goal was simple: minimize the impact that the UAD would have on your data entry workflow. We obsessed over every mouse click, keystroke, and eye movement. And we're glad we did. Our solution is better, faster, and less intrusive than what we see others doing. Here is a look at some of the models we evaluated, and why we decided some of them weren't great for appraisers.

1. A side panel — In this model, all the new UAD data collection fields are housed in a docked side panel to either side of the form. This is the model that SFREP (and thus WCA-Inc.) chose to go with*. During our evaluation, however, we realized that there is too much mouse and eye movement due to the location of the UAD fields. It caused us to slow down because every time a UAD affected field is encountered, we had to take our hands off the keyboard, grab the mouse, point to the panel, complete the required data entry fields, save them, then move the cursor back to the form and continue filling out the report. And that's the best case scenario. For the new UAD fields where additional data is required (condition, for example) there was vertical scrolling. All in all, the data entry workflow was far too inefficient in the side panel method.



The side-panel UAD formfilling method proves cumbersome and time consuming by taking you out of the form itself.

2. Windows dialog screens — This method is a popular choice among other software vendors, with both ACI and Bradford adopting it*. A Windows dialog screen is a popup window that requires some type of input. You see them in other programs all the time where you have to click "OK", "Cancel", or "Close" to get the window to go away.

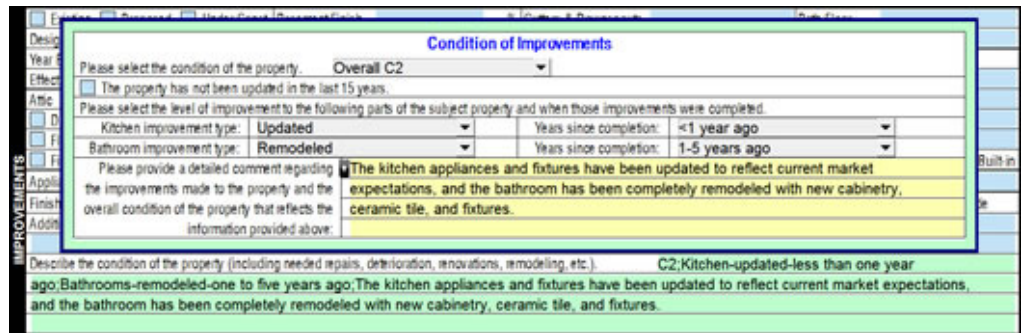


Although a simpler implementation for most vendors, the Windows dialog box is more disruptive to appraisers' workflow, involving unnecessary extra clicks.

With dialog screens you'll have several fields to fill out, followed by an "OK" or "Cancel" button to close. In our experience, all the additional clicking made it more time consuming to fill out forms. We rejected it immediately even though it was a much simpler approach and would have saved us months of development time. But our goal wasn't to get it done easily. We wanted you to be able to complete your reports using the workflow that you're accustomed to. Which leads us to the solution we chose...

3. Form popups — Although this was the most time consuming and difficult method to implement, we chose it because it's the most natural way to fill out the additional data fields for UAD. Because these new form popups are an extension of the form itself, navigation and data entry are smooth and fluid. Like any other form field in TOTAL or Aurora, you can simply "Tab" or "Enter" in AND out of them without ever having to click "OK" or move your mouse to a side panel.





We decided on form pop-ups because they are non-disruptive and easy to adapt to. When you're done with a field, simply tab or enter to the next field like you normally would.

Since all the new UAD fields are built directly into the form itself, there's never a need for you to "turn on" or "turn off" UAD features. Just use the UAD-compliant or non-UAD-compliant version of the form (there's a new category of forms in your Contents View called "Uniform Appraisal Dataset Compliant") as needed. And if you need to change, you simply swap forms. It couldn't be easier. Plus, you can merge old non-UAD compliant reports into new UAD-compliant reports in the same way you always have, and our real-time validation engine will tell you which fields are out of compliance.

And last, but certainly not least, by building these popups directly into the form, you can continue to use TOTAL and Aurora's great time-saving features like recent responses and QuickLists in many of these new UAD-required fields.

We've done the hard work to ensure that our customers have the fastest, easiest, and most comprehensive UAD solution available. If you're using either WinTOTAL Aurora or TOTAL 2011 you can download these new features now from our labs site at www.alamode.com/labs and see for yourself how easy this is going to be.

If you're using another formfiller, it's time to pick up the phone and ask how they're going to handle UAD formfilling. Until recently, they've been mostly silent on their plans. That's a dangerous approach, indeed. One of the reasons we chose to get our solution out first is so we'd have ample time to improve our products based on appraisers' feedback. We've got two updates planned as a result. Unfortunately, other vendors won't have much time, if any, to get their feedback and make improvements.

These changes to your workflow aren't trivial. Regardless of which system you choose, there will be a learning curve to completing your reports the new way. And if your vendor doesn't handle UAD the right way, it may just be easier to switch formfillers altogether. If you're curious, feel free to call us at 1-800-ALAMODE to get your free, UAD-compliant trial.

— Paul Stansberry, Product Manager
For more information, visit www.alamode.com/labs.

** This is all based on the screenshots that we've seen so far. Since the products haven't been publicly released, we can only assume that they'll take these paths.*