

# Field Data Collection with Pocket TOTAL

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presented by a la mode



## Course Highlights

- Eliminate duplicate data entry and trim valuable minutes from every report
- Tap into your XSite to start new appraisals in the field
- Capture and proof photos on site

# Field Data Collection with Pocket TOTAL

## Introduction to Field Data Collection with Pocket TOTAL

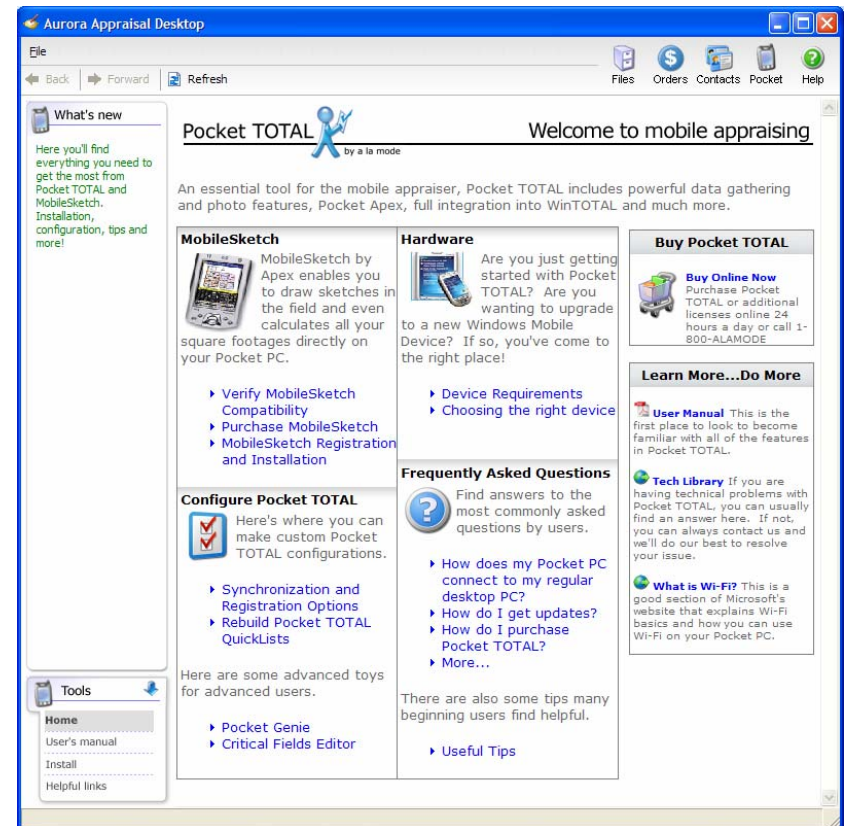
### Introduction to Field Data Collection with Pocket TOTAL

Collecting data in the field is one of the most time consuming tasks faced by appraisers. Often, this is compounded by the need for entering data twice – once on a paper inspection form, then again into a form-filling application. But mobile tools like Pocket TOTAL have eliminated this duplicate data entry and improved the overall process of field inspections. Using Pocket TOTAL, you can complete a property inspection, entering the specific data as you go along. Mobile Sketch allows you to complete the sketch before you leave the property, ensuring that all dimensions have been collected. Arriving back at the office, this data is synchronized with a desktop system where the appraisal report can be completed in record time.

### Hardware Requirements

Pocket TOTAL and Mobile Sketch are developed for the Pocket PC platform running Microsoft's Windows Mobile operating system. At a minimum, your device should have 32MB of memory, though 64MB is recommended to allow ample room for storing reports. Some other options to consider are:

- ❑ Bluetooth technology connects your device with other mobile tools like phones, global positioning systems and Disto laser measuring devices.
- ❑ Wi-Fi technology gives you access to wireless networks and public hot spots.
- ❑ Ruggedized devices are specially built to withstand extremes of temperature, moisture and hard knocks.
- ❑ Transflective displays ensure that you'll be able to use your device in bright sunshine as well as dark hallways.
- ❑ Extra batteries and chargers come in handy when you're trying to squeeze in one more inspection at the end of the day.



### Copying the program to your Pocket PC

Since the Pocket TOTAL setup files are copied to your desktop PC at the time WinTOTAL is installed, there's no need for a separate CD. Everything is done through WinTOTAL.

1. On your Pocket PC, close any programs that may currently be running and could interfere with the installation.
2. Connect your Pocket PC to your desktop computer and start the **ActiveSync** utility provided with your device.

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3. Go to WinTOTAL's Appraisal Desktop and click the **Pocket TOTAL shortcut**.
4. Click **Install Pocket TOTAL** from the list of options on the left side of the screen.

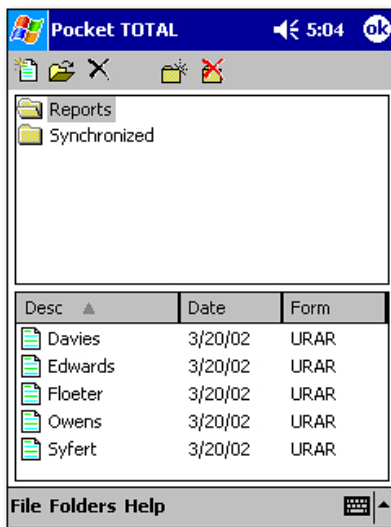
It may take several minutes for the program to be copied to your Pocket PC. Just follow the instructions as they appear on screen to register Pocket TOTAL and Mobile Sketch.

The install program creates an icon for you in your Pocket PCs Start menu. To start Pocket TOTAL, simply tap **Start, Programs**, and then the icon for **Pocket TOTAL**.

## Getting updates to Pocket TOTAL

Updates to Pocket TOTAL are delivered right along with WinTOTAL updates. Just as reports are synchronized, updates will be synchronized as well upon establishing a connection between your Pocket PC and desktop computer.

## Pocket TOTAL Report Manager



By default, the **Pocket TOTAL Report Manager** will be displayed first. The **Report Manager** is your virtual file cabinet for your reports. Just as in WinTOTAL, you should create additional folders to store reports and templates. To create new folders, do the following:

1. Bring up the **Report Manager** window. It loads when you first start the program. It

can also be accessed while in a report by tapping the File menu and choosing Open.

2. Tap the **Folders** menu and choose **New**.
3. Type the name of the new folder, and tap **OK**.

There are several other items you can use in the **Folders** menu to manage your folders. These operations work on the currently selected folder.

- Use the **Rename** option to give a folder a new name.
- The **Delete** function removes a folder and all of its contents.
- The **Refresh** function is supplied for rare situations when a report may be copied into a folder in a background operation like EDI.

## Moving and copying reports

To move or copy a file from one folder to another, do the following:

1. Tap on the file you wish to move or copy.
2. Tap the **File** menu and choose **Move** or **Copy**.
3. Once the **File Move or Copy** dialog appears, select whether you want to move the file or copy it.
4. Then, select the destination folder from the drop-down list.
5. Tap **OK**.

## The "Synchronized" folder

When you installed Pocket TOTAL, a **Synchronized** folder was created in your WinTOTAL File Cabinet and in Pocket TOTAL's Report Manager. Simply move or copy any file you wish to transfer to the other system into the **Synchronized** folder and it will be transferred next time you connect - even if WinTOTAL isn't running.

You can also configure individual folders as the "synch" folder for each user. In the Appraisal Desktop, just right click on the folder and choose the "assign" option.

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## Creating new files

There are several ways to start a new report for Pocket TOTAL.

**Starting files in WinTOTAL.** This is the recommended way since you can clone a template and already have portions of the report pre-filled. Create it just as you would any other request. When you're done, drag the file into the **Synchronized** folder. The next time you connect your Pocket PC to your system, it will be copied to the Pocket PC.

**Creating new files in Pocket TOTAL.** Once you have started Pocket TOTAL, simply tap **File** and then **New** to start a new report. Or, tap the new document icon in Pocket TOTAL's toolbar. You will be prompted for the report name, the form type and folder for the report. When this report gets back to the desktop, you will need to add the rest of the supporting forms.

**Copying existing Pocket TOTAL files.** You can copy an existing Pocket TOTAL report by highlighting it and using the **Copy** command from the Report Manager's **File** menu. This is handy if you have templates stored on the Pocket PC.

**Exporting a report from your XSite.** Access your XSite through your hand-held device. While viewing the **Order Details**, you can click the **Pocket TOTAL** link and the order information is sent directly to a new Pocket TOTAL file.

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**Note:** WinTOTAL and Pocket TOTAL will always synchronize files that are stored in either system's **Synchronized** folder.

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## Loading an existing file

1. If the **Report Manager** is not currently in view, tap **File**, then **Open**.
2. To get to the correct folder, simply tap it with the stylus.
3. Double tap the file you want to load.

## Shortcuts in the Report Manager

Here are some shortcuts to make easier work of functions in the Report Manager.

- ❑ The **File** menu contains a **Most Recently Used** list of the last four files used. This is a quick way to get to a current project.
- ❑ To delete a file, tap it once. Then click the **X** button in the toolbar.
- ❑ To delete a folder, highlight it and then either go to the **Folder** menu, and click **Delete** or click the folder with the red **X** button in the toolbar.

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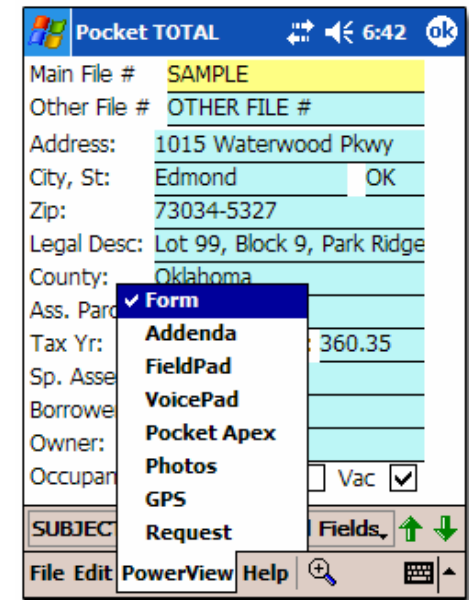
**Note:** The "reports" and the "synchronize" folders can not be deleted.

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- ❑ If double-tapping is awkward, you can open a report by tapping it once and then tapping the icon resembling an open folder.

## Data entry

The Pocket TOTAL data entry environment is segmented into PowerViews. Each PowerView contains functions related to a particular portion of the report. To activate a particular PowerView, just tap once on the **PowerView** menu, and tap the PowerView of your choice. Certain functions such as: **New, Open, Save, Options** and **Help** are available regardless of the currently active PowerView.



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## Typing into fields

Typing in Pocket TOTAL primarily takes place in the **Form PowerView**.

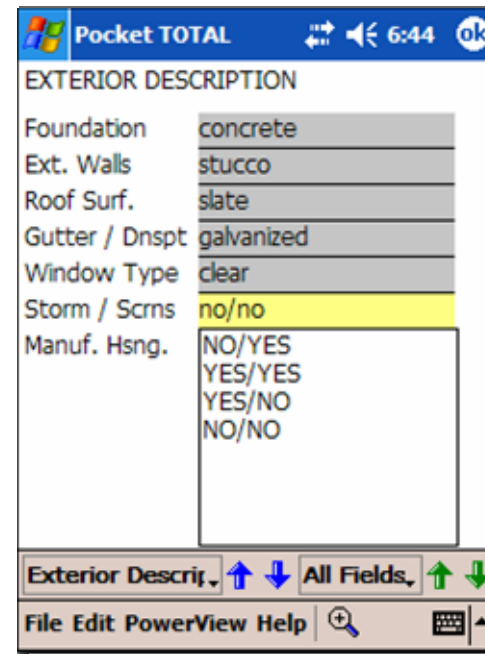
There are several different ways to “type” information that isn’t already in a QuickList: **Character recognizer** (recommended), **Block recognizer** (old Palm-style), **Transcriber** (takes practice), and **Keyboard** (slow, but reliable).

- ❑ **Moving through fields** - Use the blue arrows to move between sections. Tap on the down green arrow to move to the next field. Tap on the up green arrow to move to the previous field.
- ❑ **Jump to sections** - Below the main form to the left of the blue arrows is a drop-down menu which takes you quickly to any section of the form. This is the fastest way to get around.
- ❑ **Visible fields list** - Tap this drop-down (located between the blue and green arrows) to filter your list of fields to cause the green arrows to move through **All Fields** available in the form, all **Critical Fields** which you must get while on site or the **Empty Critical Fields** only. You can even customize the field list to show as many or few items while in the field. This is described in the “Custom Critical Fields” section below.

## QuickList comments

QuickLists are the key to the effective use of Pocket TOTAL. Using them, you can quickly move through the form without having to type data. Simply pick the items from drop-down lists that appear when you move into a field.

Pocket TOTAL’s QuickLists work in a manner similar to the way they work in WinTOTAL. When the program is installed, your comments are transferred over automatically. When you get to a field where QuickLists are defined, you’ll see them in a pop-up window, or you’ll see a button indicating the QuickList is there. Simply tap an entry to use it.



To choose whether the QuickLists show up as a button or a list:

1. Tap **File**, then **Options**. The options dialog will open.
2. At the bottom of the dialog, tap the radio button for **Show Button** or **Show List**, then tap **OK**.

You may add QuickList entries on your Pocket PC by using your stylus

to tap and hold a text entry. When the window pops up on your screen, simply tap QuickList + to add the text entry to your QuickList.

## Cut, Copy and Paste

The ability to **Cut**, **Copy** and **Paste** is provided in the **Edit** menu to speed your data entry. You may also access these functions by using your stylus to tap and hold the text (or the empty field) you’d like to **Cut**, **Copy** or **Paste** into. When the window pops up on your screen, tap the appropriate function, and it will be performed. The **Cut** tool is handy for clearing an entire field.

## Checkboxes and picklists

Data may be entered into checkboxes by simply tapping in the data entry field. For an example of a checkbox field, try the **Predominant Occupancy** fields in the **Neighborhood** section. Certain fields have predefined picklists, such as the **Marketing Time** field.

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## Critical fields

The idea behind Pocket TOTAL is to not only save you time, but also make sure your data entry is accurate and complete. Critical fields facilitate that goal by visually indicating fields that haven't yet been completed.

- ❑ Instead of clicking in a field to enter data, the green arrows at the lower right of the screen will skip you to the next critical field.
- ❑ The **Critical** drop-down configures how those green arrows operate. Your options are: **All Fields**, **Critical Fields**, and **Empty Critical Fields**.

Critical fields may be customized through an application on your desktop. Further, entire forms can be customized to fit your workflow with our Pocket Genie utility.

## Digital Photos on a Pocket PC

Pocket TOTAL has the ability for you to read images from a Pocket PC camera or your card's internal memory. This feature is useful in situations where you are out of memory on your card or if remembering which property went with each photo is an issue. In order to use this feature, you must have the following:

- ❑ A camera that stores images on media compatible with your

Pocket PC, such as a Compact Flash (CF) or Secure Digital (SD) card.

- ❑ The camera should be configured to save images in the JPEG format.
- ❑ Finally, you'll need a Pocket PC with a CF, SD or some other slot that reads what your camera takes. You may need to purchase an inexpensive adapter for your camera's memory card in case the slot on your Pocket PC is for a different type of media.

## Reading images from the memory card

The Pocket PC operating system has a built-in understanding of memory cards. It uses them in much the same way your desktop PC uses floppy disks. In fact, the same memory cards sold for digital cameras are also sold as external storage for many Pocket PCs.

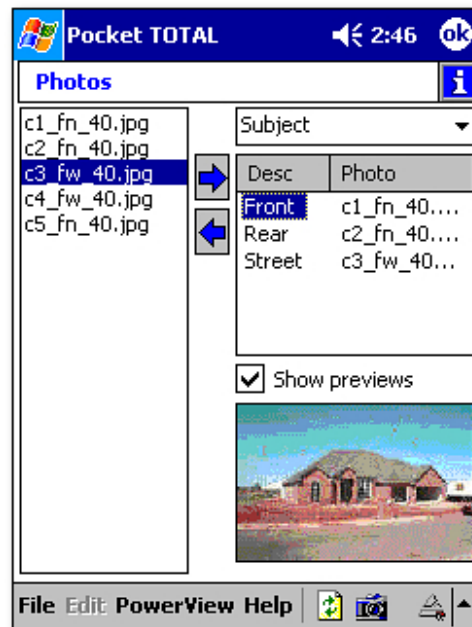
When you switch to the **Photos PowerView**, the **Image Folder** label displays the last used image directory.

- ❑ On the left side of the screen the image files in that directory are displayed. If the **Image Folder** is not correct or no image files are in the directory, click the camera icon, choose **Folder/Card** and select the correct folder.
- ❑ You may find that you need to back up several levels to get to the additional drive representing your memory card. To do so, click the plus (+) sign to expand the folder list.
- ❑ Many digital cameras store digital photos in directories on the card. For example, the Kodak digital cameras allow you to create photo albums and subsequently put each photo in the album in a separate directory.

## Previewing and placing photos

Pocket TOTAL gives you the ability to preview photos stored on a memory card or on your Pocket PC before placing them in a report.

While in the **Photos PowerView**, tap the image and make sure **Show Preview** is marked. Double-tapping the preview opens up the image in



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the Pocket PC's browser, so you can see it in more detail. Just close the browser when you are through viewing the image.

To place an image in your report, click the drop-down and choose the page, then click the image from the list and then click the arrow.

## Synchronizing images embedded in Pocket TOTAL files

When images are used in a Pocket TOTAL report, they will only be synchronized one time - inserted into appropriate photo pages in the report.

Additionally, the images on the Pocket PC take precedence over any images already in the report. After the file is copied to your desktop system, the images are removed from the file on the Pocket PC.

**Note:** For your convenience, all photos are automatically added to your photos database.

## Freeform Notes and Drawings

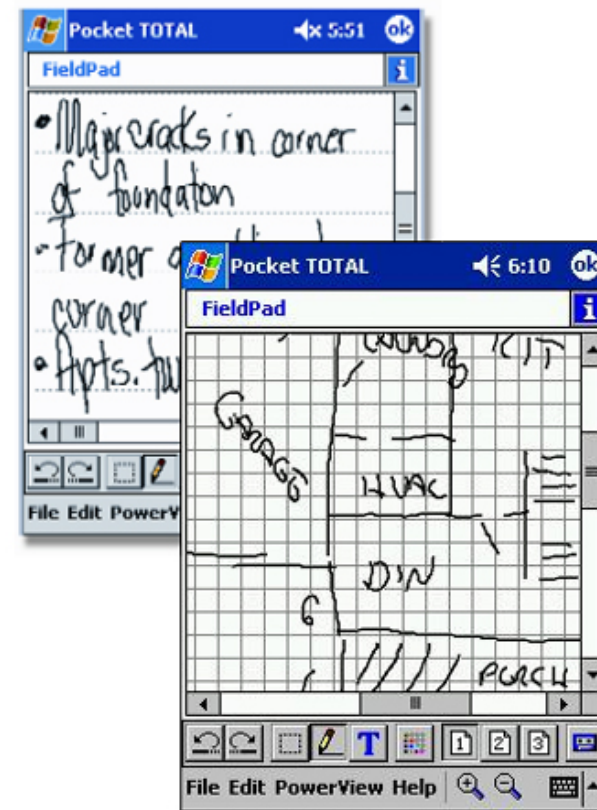
Use Pocket TOTAL's **FieldPad PowerView** to do quick free-form sketches of the inside walls of a property, special buildings on the land or other items you'd like to make quick drawings of to use later. There are several ways to use the FieldPad:

**Standard text/keyboard entry** - Tap the blue **T** to move into standard text/keyboard entry mode. Then, tap the bottom right arrow to choose your method of text entry. Once you have finished entering your text, click the pencil icon to return to drawing mode.

**Free-form drawing** - Use your stylus as a pen to begin drawing in the FieldPad. You may change the width and color of the lines you draw by tapping the color button just to the right of the **T** icon.

**Selecting, moving and resizing drawings** - You can select or "highlight" your drawing by tapping the icon that looks like a dotted square (the third icon from the left). Once selected, your drawing will be surrounded a box made up of squares and circles. These are called "handles." Tap and hold one of the square handles on the corner of the

drawing, and then drag your cursor across the screen to rescale your drawing. Tap and hold one of the circle handles and then drag your cursor across the screen to resize the drawing from that side only. (In this case, the drawing will not be rescaled but will be resized disproportionately.) To move the drawing, tap once in the center of the "highlighted" drawing, and drag your cursor.



**Undo and redo** - You can use the icon on the far left to undo your previously drawn lines. Each time you tap it, it will undo one line. Use the icon to its right to redo your previously drawn lines. Each time you

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tap this icon, it will redo one line. Consider this function when drawing and raise your stylus often to give you more undo/redo options.

**Zoom in and zoom out** – Just tap the magnifying glasses at the bottom of the screen. Tap the icon with the plus (+) sign to zoom in. Tap the icon with the minus (-) sign to zoom out.

## Capture Voice Notes

Pocket TOTAL uses audio capabilities native to the Pocket PC to record WAV files right into your report. The benefit is that you can have your live voice embedded in the report for dictation or for recall if you need to open the report for review sometime in the future.

- ❑ Multiple files may be recorded into the same inspection.
- ❑ The WAV files are only voice quality, so several hours, if needed, may be recorded.
- ❑ To save space, the audio files are removed from the PPC after the file is copied over to the desktop.
- ❑ The audio files are playable through WinTOTAL's Workfile.

## Making an audio recording

Here is how you record voice notes in the field:

1. Tap **PowerView** on the Pocket PC and select **VoicePad**.
2. Tap the red **Record** button.
3. Speak into your PPC's built in microphone.
4. Tap **Stop**.
5. Preview the recording by tapping the **Play** button.

## Mobile Sketch

A great benefit to data entry in the field is being able to sketch your floor plan and calculate areas right on site using our exclusive partnership with Apex.

Mobile Sketch works much the same as Apex IV Windows, and once you've synced with your desktop PC, the sketches you create with it will be fully editable so you can add finishing touches back at the office.

- ❑ Use the **Define** function to start new perimeters.
- ❑ Raise and lower the pen with the **ENTER** key.
- ❑ Lines are drawn by typing the dimension and direction and then tapping **Enter**.
- ❑ Arc capabilities are accessed by tapping **O**.
- ❑ Remove and retrace lines via **DEL** and **INS**.
- ❑ Auto-close areas using the **Close** item.
- ❑ Pop to walls and corners using the **CTRL** function.
- ❑ Zoom in and out using the +/- keys.
- ❑ Use the **Objects** item from the **Draw** menu for predefined circles, boxes, etc.
- ❑ Add up to five pages per sketch to fit in all areas of the floor plan.
- ❑ Change the appearance of the dimensions, line width and color of objects you've drawn by selecting them and choosing **Object Properties**.

## Synchronizing with Your Desktop PC

Any new QuickList items that have been added to WinTOTAL since the last time you connected will be transferred to your Pocket PC automatically.

Before connecting your Pocket PC back to your computer, make sure the file you wish to synchronize is moved to your **Synchronized** folder on the Pocket PC.

1. Tap **File**, and select the **Move or Copy** function. This will open the **File Move or Copy** dialog.



