Formfilling Shortcuts

presented by a la mode

Course Highlights

- Aurora's new look and feel make navigating your reports much faster
- It's easier to start reports in Aurora
- Forget cloning: SmartMerge is smarter and more efficient
- New QuickNotes are virtual "sticky notes" - great for reviewers!

Formfilling Shortcuts

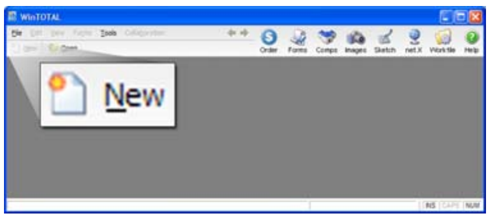
Introduction to Formfilling Shortcuts

Arriving at the value of a property is only one step in the appraisal process. The task of creating the actual report can often consume as much – or more – time from an appraiser's day. There are dozens of tools available to appraisers to help reduce the amount of time spent filling out the appraisal forms. This course shows you how you can trim valuable minutes from every report you create.

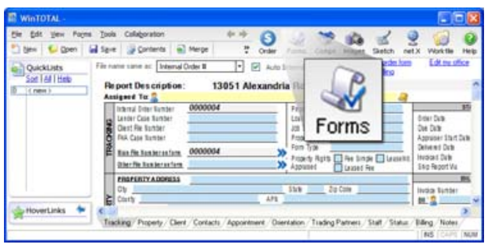
Jump start a new report

WinTOTAL contains a number of features that help you build a report. However, sometimes you just need to get to a URAR or 2055 and start typing. Here's how in three easy steps:

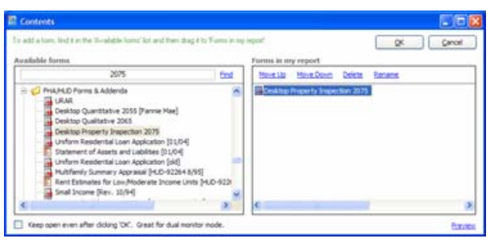
1. In WinTOTAL, click the **New** button on the menu bar.



2. Type a name for your report in the **Report Description** field, then click the **Forms PowerView** button.



3. Double-click the name of the form in the **Available Forms** list on the left to add it to your report, then double-click the form in the window on the right.



That's it!

Start typing your report.

While this "Jump Start" method gets you to the form with minimal hassle, it also skips over some powerful tools that may save you a lot of typing later. Read on for a more deliberate method.

Starting a new report

There are two primary places from which to launch a new report: **Appraisal Desktop** – Select the folder you'd like your new report stored in and click **New** in the menu bar. Or, choose **File, New**. WinTOTAL opens and presents you with a new report order form.

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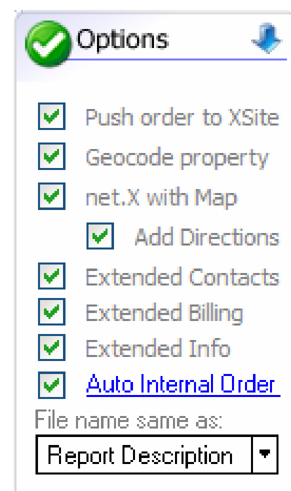
Whichever method you used to create the new report, you're taken to the **Orders PowerView**. This replaces the Requester found in previous versions of WinTOTAL and presents several advantages. Since this is a form, you can build and use QuickLists to assist in filling out the new order request. Also, the order form can be printed just like any other form.

New Order Options



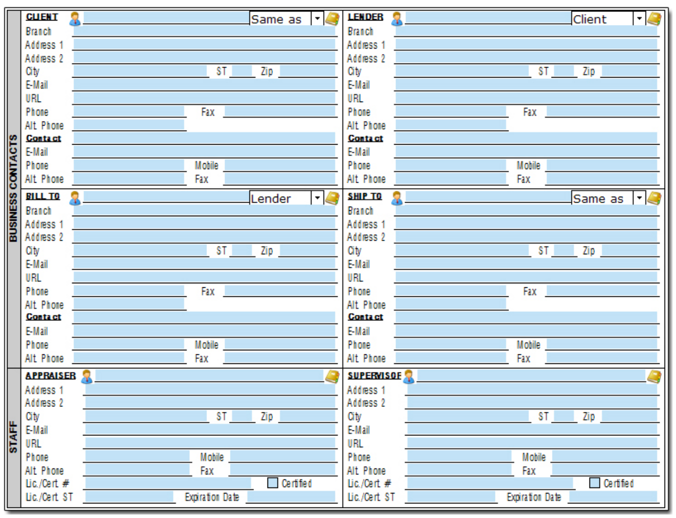
As you fill out the order form, you have the option of allowing WinTOTAL to complete several tasks for you on the fly. These items are controlled from the **Options** menu located in the menu pane on the left side of the Order PowerView.

Geocode property – Your subject property is automatically "geocoded" when you enter the address in the Order form. This is highly recommended, as it then enables some of the proximity features which come in handy when completing the report.

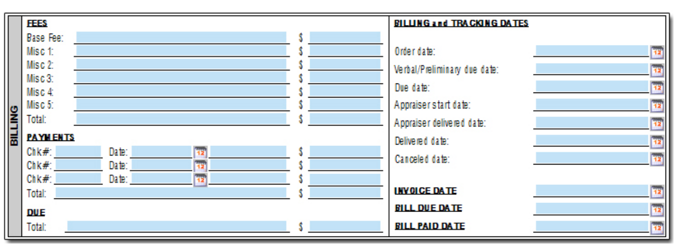
Formfilling Shortcuts

net.x with Map – A preliminary location map is automatically downloaded as soon as you enter the address for the subject property. This map is then displayed on the Order form, for use in locating the property during the inspection. Also, if you select the **Add Directions** option, driving directions from your office to the subject are also inserted on the Order form.

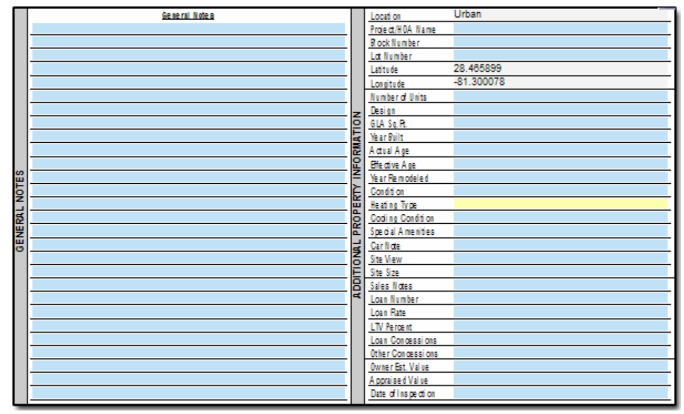
Extended Contacts – New sections containing detailed information for all of the contacts associated with this report are added to the bottom of your Order form.



Extended Billing – A Billing section is added to the end of your Order form to help track the billing and payment for your report.



Extended Info – Another section is added to the Order from allowing you to enter extended notes, as well as a wealth of additional information about the subject property.



Auto Internal Order – WinTOTAL automatically generates an order number for each new report. To specify the format of the numbering, click on the link and set your preferences in the dialog box.

File name same as – Indicates how your files will be named when stored on your hard drive. Of course, using the Appraisal Desktop, you may never see these file names. From the drop-down menu, select the desired option.

Filling Out the Order Form

Some features to note as you complete the order form:

- If you've enabled the **net.X with Map** feature, as soon as you enter the address of the subject property, WinTOTAL contacts our net.X servers over the internet and downloads a location map, census data, FEMA flood zone information and, if desired, driving directions from your home office.
- As you move through the fields in the order form, the field color changes to indicate you've been to this portion of the form.

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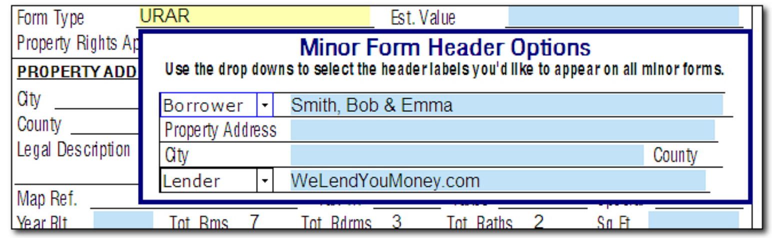
- In any field that contains the or icon, you can select data from or add entries to your **Contacts** database.
- In any field that contains the icon, you can select a date from a pop-up calendar that will appear when you click the icon.
- In any field that contains the icon, click it to insert a location map, flood, and census data into your report. Of course, this data should already be entered, if you chose to have the map downloaded automatically.
- In the appointment field that contains the icon, you can add your appointments to your Outlook or XSites calendar to help you maintain your schedule.
- When the icon appears in a field, click it to designate that the content of that field is the same as either the Internal Order, Lender Case, Client File or FHA/VA case numbers entered in the Tracking section of the Order form.
- Additional fields have a drop-down menu from which you can choose additional **Same as..** data. The items displayed in these menus change depending upon the type of information each field might contain. For example, the **Client** field can be the **Same as** the **Lender**, the **Bill to** or the **Ship to** fields.
- When the icon appears in a field, this indicates the presence of a "recent response" entry. Use your mouse and click the icon to display the list of your most recent entries in that field. Or, press **Alt+Down Arrow** on your keyboard.
- To quickly move around the form, click the section tabs found at the bottom of the form.
- The **Status** pane on the left also integrates with your XSite as it controls the orders status as it applies to your XSite orders.
- When you move into the **Form Type** field in the Order form, you're presented with a dialog box which allows you to change the header labels used on all of the minor forms in your report. Simply click the labels you wish to use in the drop-down menus.



Note: *As you move through the fields in the order form, the field color changes to indicate you've been to this portion of the form.*

Manually Inserting a Map

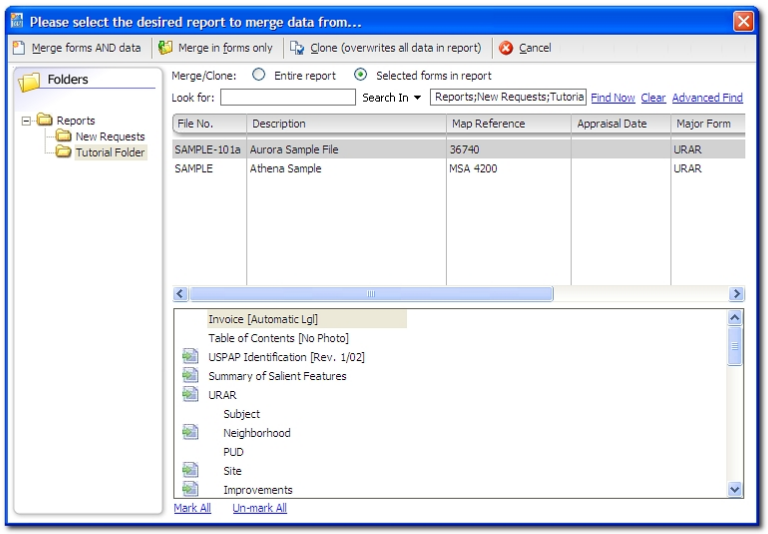
If you decided not to have WinTOTAL automatically download a location map — or if you need to fine-tune the one that was retrieved for you — you should do so manually before you leave the order form. This step is important, as it geocodes your subject property and enables several proximity-oriented features used later in the report.

1. Once your order form is complete, choose **Tools**, **net.X Wizard**, then **Maps and Data** from the menus.
2. The net.X wizard appears with your subject property listed. Verify the address and click **Next**.
3. A map is downloaded showing the subject property. Confirm the placement on the map, or click the balloon, then grab the square box at the point and drag it to fine tune the location.
4. If desired, click the **Get Directions** button in the **Driving** tab of the **Location Map Options** menu pane to generate driving directions from your office to the subject property. Click the **Print Directions** button to send them to your printer.
5. Click **Finish** to accept the subject's location. A location map is placed in the order form, as are the driving directions, if any.

Formfilling Shortcuts

SmartMerge forms and data (formerly Cloning)

Now that the order form is complete and your subject property is properly located, you can merge data and forms in from an existing report or template. Aurora's SmartMerge function takes the place of "cloning" in older versions of WinTOTAL, but is actually much more powerful. WinTOTAL now allows you to merge data from individual sections of forms, as well as the whole form or the whole report. Also, you can merge data into your report at any time from within WinTOTAL. See the section "Merging Data" below for more information.



1. Click the **Merge** button at the top of the **Order PowerView**.
2. If necessary, use the **Look for** field to locate an appropriate older appraisal. Or, click on your templates folder in the **Folders** pane and select the desired template.
3. To merge in the **Entire report** click that radio button then move on to step 5 belos.
4. Or, choose the **Selected forms in report** option. The forms contained in the selected report are displayed below the file list. Double-click each form in this box to select or deselect it for inclusion in your new report.

Hint: *In Aurora, you can merge sections of a form in addition to the whole form itself. For example, if you just wanted to merge the* ***Neighborhood*** *section of the URAR into your report, you should just double-click the* ***Neighborhoods*** *section in the list.*

5. Finally, click one of the available buttons at the top of the screen to complete the data merge. You have three options:

- Use **Merge in forms AND data** to bring over the older report's forms, as well as the data in them. Any fields you've already completed in the order form will be retained in the new merged report.
- If all you want is the forms from the older report, but no data, choose the **Merge in forms only** button.
- The **Clone** option allows you to make an exact duplicate of the older report. Any information you entered in the order form is overwritten with the data from the older report.

Selecting Forms

If you use the merge feature, your report may already include all of the necessary forms. If not, or if you want to add additional forms:

1. Click **Contents** in the menu bar.
2. From the Contents window, use the **Find** feature to locate the desired form. Or, scroll through the available forms in the window on the left side. Forms are grouped into folders by type. Double-click any folder to expand it and show the available forms.
3. At the top of the list is the **Custom Forms** folder. This holds the forms you use most often. Its contents can be customized by clicking the **Click to customize** link.
4. When you locate the desired form, double-click it to add it to your report, or click and drag it across.

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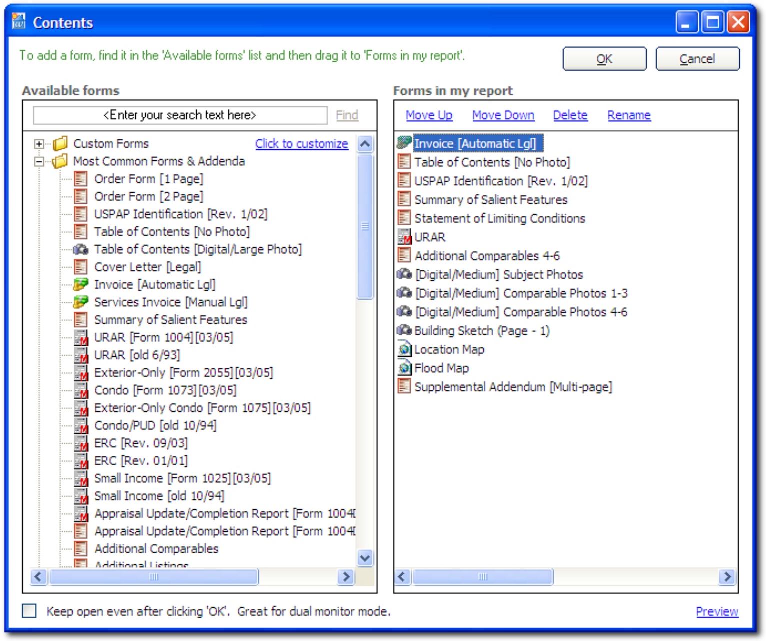


5. On right side, the forms currently in your report are displayed. You can change the order of these forms by dragging them up or down the list. Or, use the **Move Up** and **Move Down** links.

6. To remove a form from your report, select the form and click **Delete**.

***Note**: Do not double-click the form, as that switches WinTOTAL to the **Forms PowerView** with that report open.*

7. If desired, you can change the name of a form for the current report. Select the form and click the **Rename** link. Type a new name and click **OK**. Renaming the form here does not affect the default form name, but it will be reflected in any future reports you may create using this report in the Merge process.

8. At the bottom of the window is the option to keep the contents window open even after you click OK. If you have dual monitors or a particularly large display area, you may want to select this option.

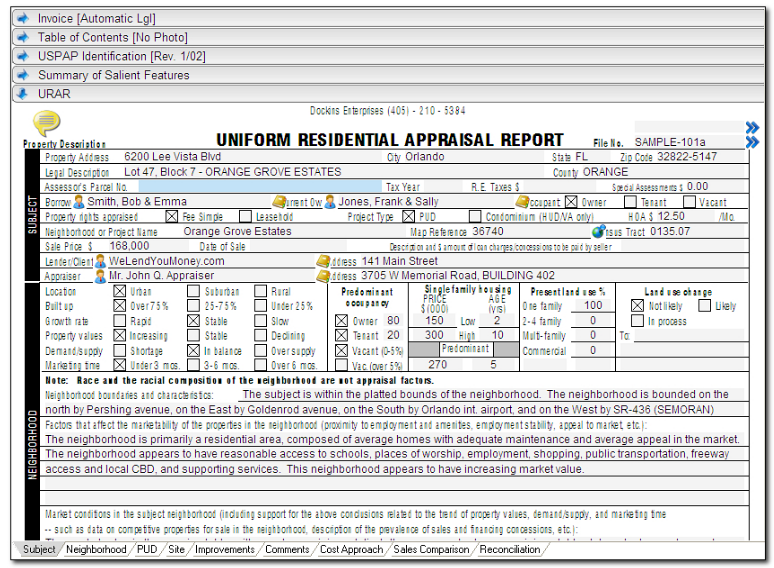
9. Click **OK** to return to the Order form.

Formfilling Concepts

At this point, your report is ready to go. Click the **Save** button to keep your changes, then click the **Forms PowerView** button to begin completing your report.

Navigating forms

By default, all of the forms in your report are displayed in the **Forms PowerView**, scrollable from top to bottom.



To quickly access a particular form:

1. Click the **Collapse All Forms** button to reduce the forms to headers.

2. Click the header of the form you want to edit to expand it. Click the header again to collapse it.
3. Click the Expand All Forms button to expand all of the forms at once.
4. If you prefer, you can use **Jump to forms** button to quickly get to any form.

Merging Data

You saw when you created a form how to merge forms and data from one report into your new one. But while you're filling out a form, the **SmartMerge** feature is also available to bring data in from a single section of a form into the current report. To do so:

1. From the menus, select Forms, Merge Form data from existing report.
2. Select a report from your folders, then click the **Un-mark All** link.
3. Now, double-click just the section of the form you want to merge from the list box.
4. Finally, click the **Merge in forms and data** button to merge in your data.

QuickLists

One of the most powerful features in WinTOTAL is also one of the least understood. QuickLists eliminate repetitive typing. They allow you to complete entire fields with a single keystroke. Or you can complete entire sections of a report with a simple double-click. And since QuickLists are field-specific, you don't have to scroll through long lists to find the appropriate comments.

To create a QuickList entry:

1. Place your cursor in the field you wish to create a QuickList for and type the comment.
2. Double-click **New** in the **QuickList** pane or press **Atl-0**.
3. Type a name for this entry and click **OK**.

Your comment is added to the QuickList for this field. Now, whenever you enter this field, the comment you saved appears. Just double-click the comment in the **QuickLists** pane to insert the text in the field.

Multi-field QuickLists

QuickLists are a great tool for quickly entering a comment into any field. But you can also create a QuickList entry that inserts data into several fields at once. These fields can be an entire section of a report, or several, non-contiguous fields throughout the form. To do so:

1. Hold down the **Ctrl** key and click on the first field for your selection. This is the field you will be in when you use the QuickList entry in the future, though it does not have to be the first field in the form.
2. Now, if you want to select an entire section, hold down the **Shift** key and click in the last field of the section. Or, hold down the **Ctrl** key, and continue to click in all of the additional non-contiguous fields.
3. Double-click **New** in **QuickList** pane or press **Alt-0**.
4. Type a name for this entry and click **OK**.

Use this new QuickList entry just as you would any other.

Hint: *When you create a multi-field QuickList item, WinTOTAL is smart enough to know which fields your using, and where those fields are in different forms. So, if you create a QuickList item in one form, then use it in another, the data is still inserted in the proper fields, even if they're not in the same place!*

Adding files to your report

To add a file to your report:

1. With a report open in WinTOTAL, click the down arrow by the **Add** button. Files can be added to the Workfile using one of four methods:

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Document from clipboard copies the image currently in the Windows clipboard into your report file. When you use this option to add a document to your report, WinTOTAL will automatically pull the latest image you've added to the Windows clipboard into your report. In addition to the other options outlined below, you can indicate whether you'd like to send the image to the image optimizer before adding it to your report.

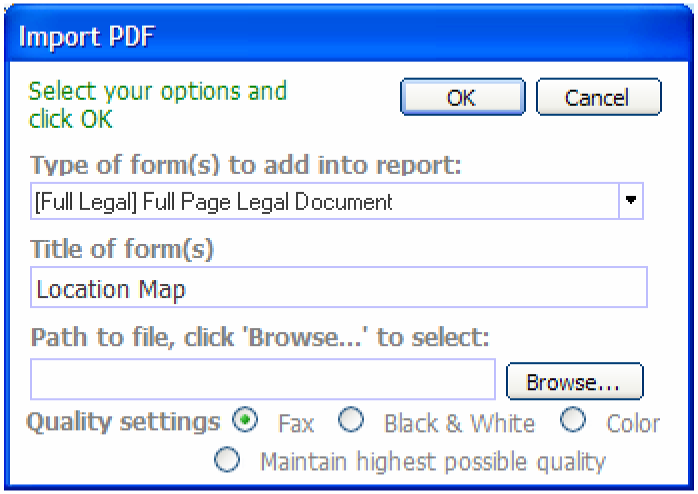
Note: *If you have not copied an image to the Windows clipboard, this option will generate an error when you choose it.*

Document from file allows you to browse your computer for the file that you want to add. When you use this option to add a document to your report, WinTOTAL prompts you to browse for the file you wish to add.

Document from scanner launches your scanner software to bring in a hard copy of a document.

Document from PDF imports any PDF file directly into your report.

2. Click the option that corresponds with the source of the file you want to import.



3. WinTOTAL prompts you to select the type of form you'd like to use to import this data. Choose a form type that suits your preference and then type a title that reflects the file you're importing.
4. Finally, choose an appropriate image quality using the Quality settings radio buttons and then click **OK** to import your file.

Note: *If you're importing an PDF file, in addition to the standard fax, black & white, and color quality settings in the other options, you have the choice to maintain the highest possible quality during the process of converting the PDF into an image file.*

QuickNotes

One of the advantages to a printed form is that you can attach a paper note to it if you want to convey some information about the report for another appraiser. Often, review appraisers attach enough of these messages that it's hard to see the report behind the notes. WinTOTAL now lets you leave electronic "sticky notes" anywhere on any form. These notes display on screen, but do not show up on the printed copies. They make a great teaching tool, as mentors and reviewers can point out minor items, as well as critical errors.

QuickNotes are available in three levels

Standard (Yellow)

Needs Review (Red)

Reviewed (Green)

To create a QuickNote:

1. Click the note icon of choice (Yellow, Red, Green).
2. Click the area of the form where you want note to appear.
3. Type your comments in the text box which appears.
4. Click the **X** in upper right corner of the window to close and save your note.

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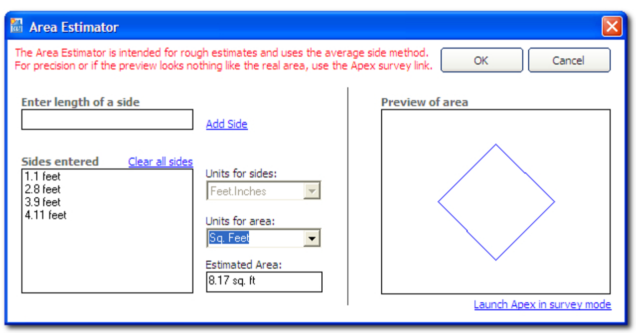
The note is placed in your document shown as a semi-transparent balloon.

- If you need to reposition the note, just click and drag the balloon to another location.
- To read a note, double-click the balloon.
- To change the type of note, right-click on the balloon, then choose **QuickNote Type** and select the desired note type.
- To remove a note from your report, right-click the balloon and choose **Delete**.
- To choose how QuickNotes are displayed in the report, click the **Show QuickNotes** icon and select whether to **Hide all QuickNotes**, display only those of one kind, **Open all QuickNotes** in the document, or **Close all QuickNotes**.

Area Estimator

Calculating the area of an irregular lot can prove a challenge for even the most geometrically-gifted appraiser. WinTOTAL provides a simple utility to estimate areas using the "average side" method.

1. Click a field in which you'd like to include your area estimation.
2. Then, from the menus, select **Tools**, **Area Estimator**.
3. Select the desired units (Feet/inches, meters, miles) from the Units for sides drop-down menu.



4. Select the units for the result (Sq feet, Acres, Sq meters, Sq miles, Sq kilometers) from the Units for area drop-down menu.
5. Enter the first measurement in the text box and press Enter or click Add Side.
6. Continue entering additional sides until all dimensions have been entered. The **Estimated Area** is calculated as you add sides and displayed in the **Estimated Area** text box.
7. If you make an error in one of the dimensions, click the **Clear all sides** link to start over.
8. At any time, you can select different **Units for area**.
9. For a more accurate calculation, click the **Launch Apex in survey mode** link.
10. To use the results in your report, simply click **OK** and they will automatically be inserted into the field you chose.

E&O Reviewer

Once your report is complete, click on the **E&O Check** button in the **Report** pane. This executes the built-in Errors and Omissions tool and displays the results in a window below your forms. Scroll through this list to review the results.

- Click the **Add to Addendum** check box to include this report as part of your addendum. Choose the **Error & Omissions Results** form in the **Jump to Forms** drop-down menu to display and annotate this report.
- Select the **E&O warnings** radio button to display the specific warnings grouped by report section. Double-clicking any warning will display that section of the report in the form window.
- Click the **Options** link to set certain threshold values for the E&O checker to use.

Formfilling Shortcuts

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