

Report Management, Digital Workfiles and Archiving

presented by a la mode



Course Highlights

- ❑ Aurora's File Cabinet keeps you even more organized, and now has subfolders
- ❑ Going paperless is finally a reality with the new digital Workfile
- ❑ Our DirectFax technology turns your paper Workfile to PDF in a flash
- ❑ Track what's been done to a report, when and by whom, all at a glance

Report Management, Digital Workfiles and Archiving

Introduction to Report Management, Digital Workfiles and Archiving

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USPAP requires that you keep a copy of every report you've done for five years. Fortunately, the AQB has also specified that these reports can be kept electronically, rather than gathering dust in boxes stored in a warehouse. This course teaches you how to create a USPAP-compliant electronic storage file, and then store and manage your files, backing them up on a regular basis to ensure business continuity in case of disaster.

Key features in the WinTOTAL Appraisal Desktop

The Appraisal Desktop's File Cabinet is more than just the place you see your files listed. It is a powerful application that allows you to manage your appraisal files for easy storage and retrieval.

Configuration Options

To get the most out of the Appraisal Desktop, you should customize some of the configuration options to suit the way you work. To begin:

1. From the **Appraisal Desktop** menus, choose **Options, Configure**. The following items are found in the **General** tools pane.

Miscellaneous – This area allows you to set numerous options for how WinTOTAL operates. Specific to the Appraisal Desktop are two items. If you use the Appraisal Desktop to manage your files, you may want it to launch whenever you work in WinTOTAL, and remain available, even after you open a report. To do so, make sure the **Open Appraisal Desktop when WinTOTAL starts** option is checked, and that the **Close Appraisal Desktop when opening a report** is not checked.

File Cabinet status – This setting enables the Appraisal Desktop to automatically track the status of your reports and present them in a simple color-coded "stop-light" view. If you want to manage file

status on your own, select the **Manual Status Only** button. To have WinTOTAL manage the process, click **Automatic Status**, then select from the reporting options presented.

Select a User – This setting allows you to choose the current user in WinTOTAL or manage existing users.

Edit my database paths – This option allows you to change WinTOTAL's default directories for images, report files, and image thumbnails.

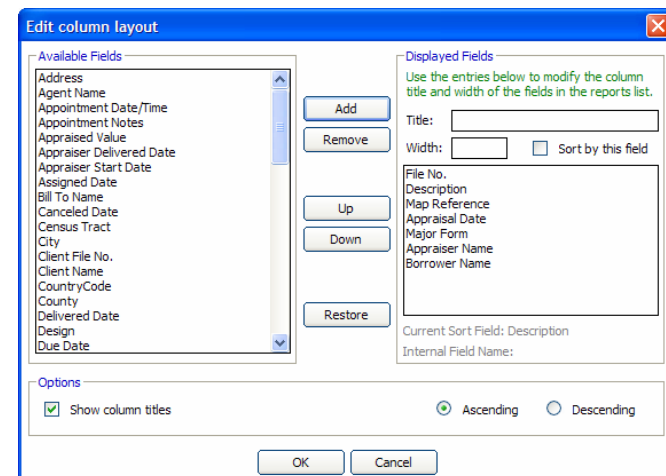
2. Click the **Save** button to retain your new settings.

Viewing your files

Working with the file lists in the Appraisal Desktop is similar to other file lists found in Windows and previous versions of WinTOTAL.

Editing Columns – To change the items displayed in the file list:

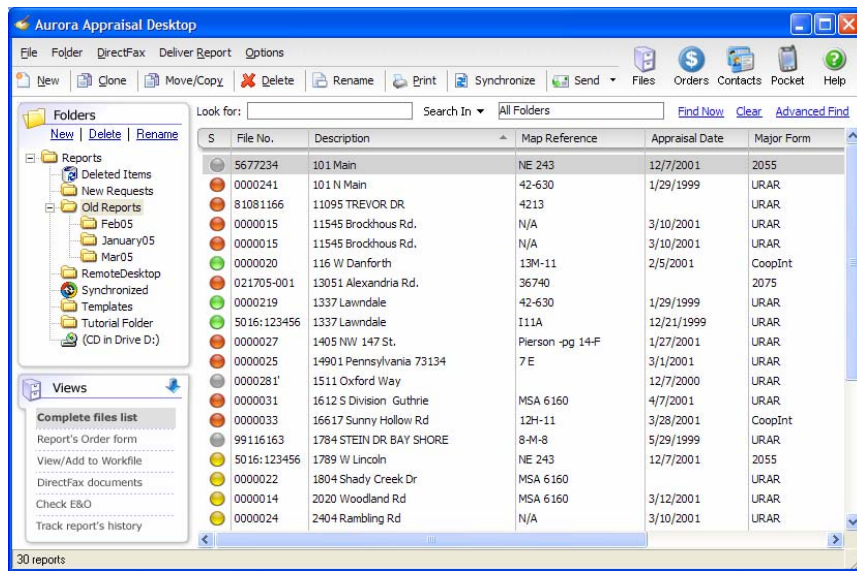
1. Right-click anywhere in the file list and choose **Edit column layout**.
2. Select the desired information from the **Available Fields** panel on the left. Double-click the item to add it to the **Displayed Fields** list, or choose **Add**.



Report Management, Digital Workfiles and Archiving

3. To remove a field, double-click it in the **Displayed Fields** list, or select it and choose **Remove**.
4. Use the **Up** and **Down** buttons to position the field in the list.
5. If desired, enter a new title for this item in the **Title** text box.
6. Set the initial width of the column by adjusting the number in the **Width** field.
7. Click **Sort by this field** if this is the field you'd like your reports initially sorted by.
8. Set initial sort direction to ascending or descending by selecting the appropriate radio button.
9. Click **OK** to save your settings.

Once your column layout is set, you can modify the column order and width by clicking and dragging the title header of the column. Likewise, you can resort the list by clicking the title header of any column.



Status Lights – The status of each of your reports is displayed in easy to read red, yellow, green or grey (no status) “stop lights.” The definition of each color can be adjusted in the Configuration Options outlined above.

To change the status of one or more reports:

1. Select the desired report. To select more than one, hold down the **Shift** or **Ctrl** key on the keyboard.
2. Right-click the report and choose **Status**, then select the desired status color, or clear.

Sub Folders – This newest version of the Appraisal Desktop allows you to create folders within folders. Simply select an existing folder, right-click and choose New. Or, select **New** from the **Folder** menu.

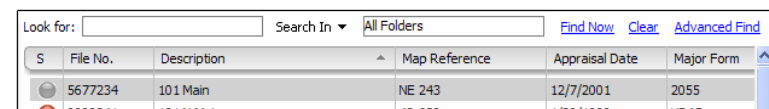
Searching for Files

Simple Find – This quick search feature is intended to give you a quick way to locate reports by searching through your files for information contained in one of the columns displayed.

Note: To use the Simple Find too, the data you're looking for must be in one of the fields displayed in the file list. For example, if you want to search by state name, you must have the **State** column displayed.

To execute a search:

1. Enter your search criteria in the **Look for** field above the file list.
2. Select the folders you'd like to look in from the **Search In** drop-down list.
3. Click **Find Now** to display the results.
4. Click the **Clear** link to reset your search criteria and display all of your files.



Report Management, Digital Workfiles and Archiving

Advanced Find – If you need to search on more than one field or look in fields not displayed in the file list, you need to use the **Advanced Find** tool.

1. Click **Advanced Find** then enter data in as many fields as desired.
2. To expand your search beyond the currently selected folder, click the **Search all folders** check box.
3. If you're going to perform multiple searches, you may keep the **Advanced Find** dialog box open even after you execute one search. Click the labeled check box at the top of the screen.
4. To limit your search to only those reports with a certain status, click the **Filter by** status check box, then select the desired status.
5. When your criteria have been entered, click the **Find** button in the menu bar.
6. If no reports are found that match your criteria, you're prompted and the **Advanced Find** box remains open to allow you to adjust your criteria.

7. Click the **Clear** link at the top of the list to reset the search criteria and display all reports.

Location Search – In addition to the usual criteria, you can also search for reports on properties within a certain proximity to a certain report. The reports must be "geo-coded" for this feature to work. This process of corresponding a physical location for an address happens automatically when you retrieve a map into a report.

1. Select the desired file in the list.
2. Right-click and choose Search within ½, 1, or 5 miles.

Report's Order Form

The Appraisal Desktop gives you direct access to the order form for any report without having to open the report.

1. Select the desired report in the files list using any of the search features listed above.
2. Click the **Report's Order Form** button in the **Views** menu pane on the left.
3. Click the **Edit** button in the menu bar to make changes to the order, then click **Save**.
4. Click the **Print** button in the lower menu bar to send a copy of the order form to your printer.

View/Add to Workfile

You can view your report's digital Workfile or add additional items from the Appraisal Desktop without opening the file. Select the desired file and click the **View/Add to Workfile** button in the **Views** menu pane on the left. Double-click any Workfile item to open it in its native application.

Report Management, Digital Workfiles and Archiving

DirectFax documents

If you've used the DirectFax function to include copies of physical documents with your report, you can view these in the Appraisal Desktop as well. Select the desired file and click the **DirectFax documents** button in the **Views** menu pane. Click the **Sync** or **Sync All** button to retrieve any newly-faxed documents. Refer to the section "USPAP-Compliant Digital Workfiles" below to learn more.

Check E&O

If you've used the Errors and Omissions tool in WinTOTAL, you can view the results from the Appraisal Desktop.

1. Select the desired report in the files list using any of the search features listed above.
2. Click the **Check E&O** button on the **Views** menu pane. A new pane opens to display the results of the last E&O check performed on that document.

Track Report's History

Whether you're the only appraiser working on a report, or several colleagues have assisted you, it can be a great benefit to track when each change was made, and by whom. This is particularly useful for review appraisers.

1. Select the desired report in the files list using any of the search features listed above.
2. Click the **Track report's history** button on the **Views** menu pane. A new pane opens showing each of the changes made to this report, when it was made and by which WinTOTAL user.

USPAP Compliant Digital Workfiles

One of the most useful tools in WinTOTAL, the digital Workfile not only allows you to comply with USPAP guidelines, but it helps you retain all of the supporting documentation used to create the report in an easy-to-

find electronic format. On top of that, archiving your reports electronically can save you money and free up space in your office for actual work!

You can add and view Workfile attachments directly in the Appraisal Desktop, but most appraisers will create their Workfile while working on the report itself.

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

Drag & Drop – Open the Windows Explorer window and drag any electronic files into the Workfile window. This method is particularly handy, since you can select several files at once and drag them over together.


Browse – Click the **Browse** icon and use the standard Windows **Open** dialog box to navigate your system, select a file and click **Open**. Note that you can only attach one file at a time using this method.

DirectFax – A powerful new service offered by a la mode. Click **Create** to print a custom fax cover sheet for this report. Any documents faxed to the toll-free number printed on the cover sheet are attached to the report's digital Workfile.

Scan – Use this option to use your attached scanner to scan any document directly into the digital Workfile.

Preview Files

Once you have files in your Workfile, click on the desired Workfile document and WinTOTAL will attempt to display it in the view pane. Most common Windows document types display properly. If not, use the **Click here to open the document** link in the **File details** pane to open the file with its native application.

 **Note:** *The application must be properly installed on your system for the file to load properly.*

Report Management, Digital Workfiles and Archiving

Vault and Exact


Sending your Workfile to the Vault

Once your Workfile is complete, you can send the entire file directly to your online Vault storage account. Click the **Vault** button on the Workfile toolbar to upload the file. You can then choose to send it immediately or mark it to send later. See the "Vault and Exact" section below for more information.

DirectFax

The DirectFax system works in tandem with your Enterprise Appraiser XSite to convert all your paper Workfile documents into one electronic file. Anybody can fax a document to special toll-free number using a custom cover sheet. You can fax supporting documents to yourself, or have your clients fax important supporting documents to you. These documents are converted to electronic files, and then attached directly to your report.

1. Gather up all of the supporting documents related to the current report.
3. Click the **Fax a document** button in the **DirectFax** menu pane.
4. Click the **Create** button in the toolbar to create and print a customized cover sheet for this report. Note that you can use a tool like Adobe Acrobat to create an electronic version of the cover sheet, which you can then e-mail to your clients.
5. Now fax all of your documents, with the cover sheet on top, to the toll-free number provided.
6. Once the fax has been sent, click the **Sync** button in the menu bar to retrieve any faxed docs.

 **Note:** You can configure WinTOTAL to automatically check for DirectFax documents and synchronize them with reports.

Vault and Exact

The Vault is a secure, online storage closet for your appraisal reports. It beats traditional paper-based archiving in so many ways: it takes up less space, it can be searched electronically and it is often less expensive, over the course of five years.

Configure

When you purchase a Vault account, you're sent a simple desktop application to install. Or, if you own an Appraiser XSite, click **Vault** from the **My Office** screen. Then, click the **Install** option. Once that's done, use these steps to configure your Vault account:

1. From the Windows Start menu, choose a la mode Vault, Configure Vault
2. First, select your connection method (dial up or LAN) and click Next.
3. Enter the Username and Password supplied with your account.
4. Enter an e-mail address for confirmation e-mails. Every time a file is sent to or retrieved from the Vault, you're notified for added security. Click Next to continue.
5. Select file types you wish to archive. Note that you can use the Vault to store reports not created by WinTOTAL. Click Next.
6. Now, decide whether the Vault should "watch" certain folders on your system. Reports stored in these folders are automatically sent to the Vault any time they change. Choose Yes and click Next.
7. Choose which folders will be "Watched." You can quickly find your appraisal report folders by clicking the Find Folders button. The Vault searches your system for appraisal files, then displays the results. Or, use the Browse button to find the files yourself. Click Next to continue.

Report Management, Digital Workfiles and Archiving

Saving and retrieving files

- The next screen allows you to enable automatic scheduling, so you don't even have to remember to upload your changed files. Click Yes, then Next.
- Select the radio button corresponding to how often you want the archiving to occur: daily, weekly or monthly.
- Enter a date and time for your archiving to occur, or click the Get Time button to have the system randomly generate one for you. Click Next.
- If you're using a slow internet connection, or have a huge number of files to send to the Vault at once, you might want to enable the file limitation setting. This prevents more than the number of files you specify to be loaded at one time. Click Next.

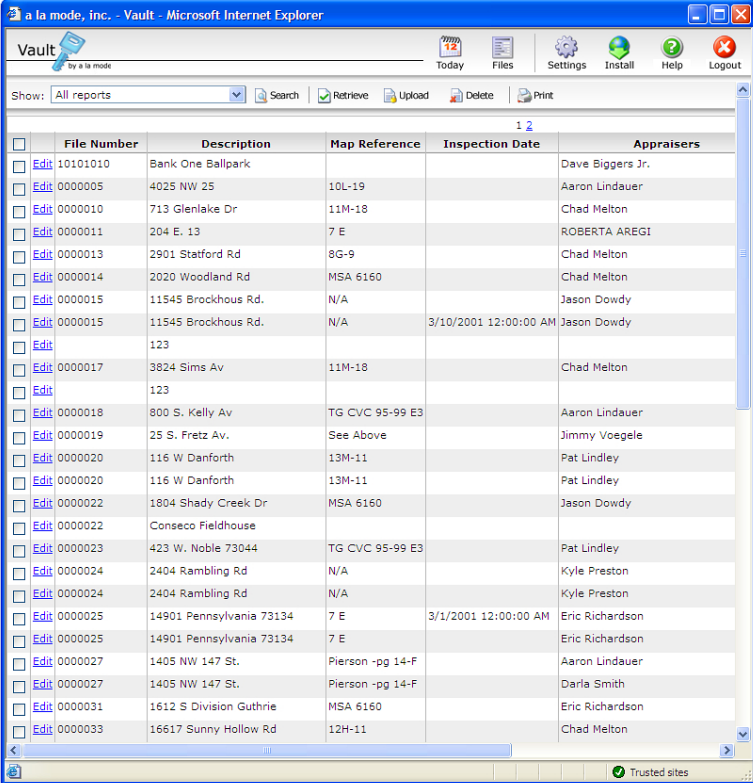
Note: *If you do set a limit, and there are too many files scheduled to be sent at one time, the rest of the files will be sent the next time you send files to the Vault.*

- The system will save your settings then prompt you with any files that need to be sent based on the new settings. Click **Continue** to send these files immediately, or click **Finish** to complete your configuration. The marked files will be sent the next time your automated upload executes.

Saving and retrieving files

If you've configured **Watched Folders** and **Automatic Scheduling**, your files are sent to the Vault automatically without any intervention on your part. If, however, you prefer to manage your files manually, you can send files to the Vault using these simple steps:

- From Appraisal Desktop's file list, select one or several files.
- Right-click and choose **Send to Vault**, or select **File, Send to Vault** from the menus.
- Click **Send Now** to upload your files.



The screenshot shows the Vault web application interface in a Microsoft Internet Explorer browser window. The page title is "Vault" and the URL is "a la mode, inc. - Vault". The interface includes a navigation bar with "Today", "Files", "Settings", "Install", "Help", and "Logout" buttons. Below the navigation bar is a search and action bar with "Show: All reports", "Search", "Retrieve", "Upload", "Delete", and "Print" options. The main content area displays a table of reports with columns for "File Number", "Description", "Map Reference", "Inspection Date", and "Appraisers".

	File Number	Description	Map Reference	Inspection Date	Appraisers
<input type="checkbox"/>	10101010	Bank One Ballpark			Dave Biggers Jr.
<input type="checkbox"/>	0000005	4025 NW 25	10L-19		Aaron Lindauer
<input type="checkbox"/>	0000010	713 Glenlake Dr	11M-18		Chad Melton
<input type="checkbox"/>	0000011	204 E. 13	7 E		ROBERTA AREGI
<input type="checkbox"/>	0000013	2901 Statford Rd	8G-9		Chad Melton
<input type="checkbox"/>	0000014	2020 Woodland Rd	MSA 6160		Chad Melton
<input type="checkbox"/>	0000015	11545 Brockhous Rd.	N/A		Jason Dowdy
<input type="checkbox"/>	0000015	11545 Brockhous Rd.	N/A	3/10/2001 12:00:00 AM	Jason Dowdy
<input type="checkbox"/>	123				
<input type="checkbox"/>	0000017	3824 Sims Av	11M-18		Chad Melton
<input type="checkbox"/>	123				
<input type="checkbox"/>	0000018	800 S. Kelly Av	TG CVC 95-99 E3		Aaron Lindauer
<input type="checkbox"/>	0000019	25 S. Fretz Av.	See Above		Jimmy Voegelé
<input type="checkbox"/>	0000020	116 W Danforth	13M-11		Pat Lindley
<input type="checkbox"/>	0000020	116 W Danforth	13M-11		Pat Lindley
<input type="checkbox"/>	0000022	1804 Shady Creek Dr	MSA 6160		Jason Dowdy
<input type="checkbox"/>	0000022	Conseco Fieldhouse			
<input type="checkbox"/>	0000023	423 W. Noble 73044	TG CVC 95-99 E3		Pat Lindley
<input type="checkbox"/>	0000024	2404 Rambling Rd	N/A		Kyle Preston
<input type="checkbox"/>	0000024	2404 Rambling Rd	N/A		Kyle Preston
<input type="checkbox"/>	0000025	14901 Pennsylvania 73134	7 E	3/1/2001 12:00:00 AM	Eric Richardson
<input type="checkbox"/>	0000025	14901 Pennsylvania 73134	7 E		Eric Richardson
<input type="checkbox"/>	0000027	1405 NW 147 St.	Pierson -pg 14-F		Aaron Lindauer
<input type="checkbox"/>	0000027	1405 NW 147 St.	Pierson -pg 14-F		Darla Smith
<input type="checkbox"/>	0000031	1612 S Division Guthrie	MSA 6160		Eric Richardson
<input type="checkbox"/>	0000033	16617 Sunny Hollow Rd	12H-11		Chad Melton

Retrieving files from the Vault is just as simple:

- From the Windows Start menu, choose a la mode Vault, Vault on the Web.
- Enter your username and password, then click Log in.
- From the Vault's Today page, click the Files icon.
- Use the drop-down menu to show All Reports or to narrow the display to the most recently uploaded files.

Report Management, Digital Workfiles and Archiving

5. Click the Search button to open a search window similar to that found in the Appraisal Desktop. Enter your search criteria and click OK.
6. Once the desired files are displayed, click the check box to the left of the report(s) and click the Retrieve button.
7. Specify folder you'd like your reports saved in and click OK.

Saving and retrieving settings

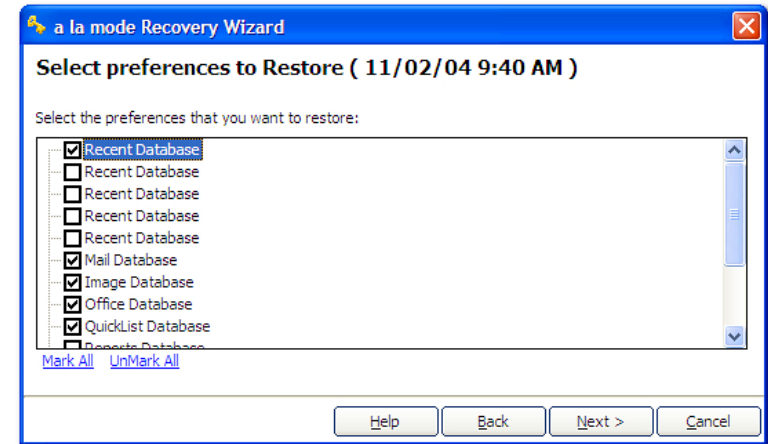
While the Vault protects your files, its companion program, Exact, protects your WinTOTAL configuration settings as well. If you move to a new computer, Exact can copy the environment from your current system to the new one, keeping you from having to recreate everything from scratch. Environment settings saved by Exact include:

- QuickLists
- Printer Settings
- Passwords
- Fonts and background color settings
- Comps database
- Digital signatures

Configuring Exact is similar to the Vault. Run the configuration utility from the Windows Start menu and follow the prompts. To retrieve your settings to a new system:

1. First, install WinTOTAL and the Vault applications to the new computer.
2. From the Windows Start menu, choose a la mode Vault, then Recover your Preferences.
3. Click **Next** to start the **Recovery Wizard**.
4. Select the appropriate internet connection type (LAN or dial-up) and click **Next**.

5. Enter your a la mode **Username** and **Password**, then click **Next**.
6. To recover all of your preferences, click **Easy Recover**. Or, if you'd like more control over what gets retrieved to the new system, choose **Advanced Recover**. Click **Next** to continue.



7. Select the date of the recovery file you wish to use, then click **Next**.
8. From the list of options, check the box next to those items which you'd like to restore, then click **Next**.
9. The Wizard completes the download and informs you when it is complete. Click **Finish**.

NOTES:
