

# Workfile PowerView

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## Workfile PowerView

One of the most useful tools in WinTOTAL, the digital workfile not only helps you retain all of the supporting documentation used to create the report in an easy-to-find electronic format, but it also allows you to comply with USPAP guidelines for storage of your appraisals. On top of that, archiving your reports electronically can save you money and free up space in your office for actual work!

The documents that make up your workfile are the same as those that once took up space in your paper files: MLS sheets, plat maps, title info, site sketches, field notes. These documents can be other electronic files, like MS Word or Excel documents, extra electronic photos, or even PDF “printouts” of web search results. But your workfile can also contain digitized copies of your paper documents – easily converted using a scanner or our innovative DirectFax service.

You can add and view workfile attachments directly in the Appraisal Desktop or through the **Workfile** PowerView in WinTOTAL. See the [Workfile View](#) section in the [Appraisal Desktop](#) chapter of this user guide for more details.

## Add Files

To add a file to the workfile from the **Workfile** PowerView...

1. From the Workfile PowerView, add the files you need to store for USPAP compliance directly into the workfile. There are several ways you can add files into your workfile.



**Browse** – Click **Browse** in the toolbar and use the standard Windows **Open** screen to navigate your system, select a file and click **Open**. Keep in mind that you can only attach one file at a time using this method.



**Scan** – This option uses your attached scanner to scan any document directly into the digital Workfile. When you click **Scan** in the toolbar, WinTOTAL presents you a list of the installed scanners. Select the desired device from the list and click **Select**. Your scanner software launches and guides you through the scanning process. At the end, the resulting document is inserted directly into your report’s workfile. For help with your scanner software, please consult the documentation that came with your device.



**DirectFax** – A powerful new service offered by a la mode. Click **Create** in the toolbar to print a custom fax cover sheet for this report. Any documents faxed to a la mode using this special cover sheet are automatically attached to your report’s digital workfile. See the [DirectFax](#) section of this user guide for more information.

2. Once you’ve added all the files you need into your workfile, remember to click **Save** to save your workfile.

## Manage Files

Once your files are added to the workfile, they appear in the file list. As with all WinTOTAL file lists, clicking any of the

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headers sorts it by that item, allowing you to quickly find any document in your workfile. To manage the documents in your workfile, [visit the workfile](#) and use one of the following options.

- **Opening and viewing documents** - To view any of your workfile documents, double-click it, or select it and click the **Click here to open document** link in the **File Details** pane on the left. WinTOTAL attempts to open whatever application created the original file. Thus, if it is a MS Excel file, WinTOTAL loads Excel and opens the document. Likewise, if it is a PDF file, WinTOTAL opens Adobe's Acrobat Reader.
- **Handling unknown document types** - If WinTOTAL cannot automatically find the application that created your workfile document, it notifies you and gives you the opportunity to select an application from your system.
- **Adding comments** - Since file names can often be brief and difficult to decipher, you can also add comments to each of your documents. Click any file and then type your notes into the **Comments** field in the **File Details** pane on the left side of the screen. These comments are then stored with your workfile and displayed whenever you click the file in the list.
- **Restoring files** – Certain file types stored in your workfile are actually items from your report. For example, whenever you change major forms in your report, a copy of the old form is automatically placed in the workfile. If you decide you need to return to the original form, you can quickly restore the old report. Likewise, if you delete a comparable from your report, you're given the opportunity to store that comp in the workfile. If you need to add additional comps to your report following a review, you can quickly re-add these

deleted comps to the report. To do so, just select the item in the list and then click **Restore** in the toolbar.



**Note:** If you restore a copy of your report with an old form, the new form is removed, along with any changes you may have made. At the same time, this form is also stored in your workfile.

## 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. To use DirectFax...

1. Gather up all of the supporting documents related to the current report.
2. Then, in the [Workfile PowerView](#), click **Fax a document** in the **DirectFax** pane on the left.
3. Click **DirectFax** in toolbar to create and print a customized cover sheet for this report.



**Hint:** 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.

4. Fax all of your documents, with the cover sheet on top, to the toll-free number provided on the cover sheet.

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5. Once the fax has been sent, click **Sync** in the toolbar to retrieve any faxed docs and add them to the list of workfile documents.
6. Double-click any DirectFax document to open it in the Acrobat Reader application.



**Note:** All documents that are faxed at one time are converted into one PDF file. Even though you may have different kinds of documents, they're all stored in one file. If you'd like to have them stored separately, use the same cover sheet, but fax them a few minutes apart.

## Send Reports to Vault

Once your workfile is complete, you can send the entire report directly to your online Vault storage account. To do so...

1. In the [Workfile PowerView](#), click **Vault** in the toolbar to upload the file.
2. Click **Send Now** to immediately send the file to the Vault or click **Send Later** to add it the [net.X queue](#) to go out to the Vault the next time you synchronize WinTOTAL with your Internet products.



**Note:** Whenever you send a file to the Vault, it is marked with a Vault icon in the **Vault** column of the File Cabinet to keep you informed about which files you've sent to the Vault and which remain to be sent.