

TOTAL for iPad

Quick Start Guide

Introduction to TOTAL for iPad

TOTAL for iPad is a la mode's revolutionary field data collection and sketching application for the iPad. By combining an appraiser's entire field toolkit including a notepad, GPS device, phone, computer, and Internet connection, TOTAL for iPad eliminates the need for a clunky clipboard. Plus, you get more accurate data since it's entered right in the field and you save time by not having to re-key information.

TOTAL for iPad is similar to other TOTAL for Mobile products, such as TOTAL for iPhone and TOTAL for Android. So, if you've already been using either of those apps, you'll find TOTAL for iPad familiar and easy-to-use.

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How to Get TOTAL for iPad

TOTAL for iPad is available from the iTunes Store at no cost. Like most other apps, you can download it directly to your iPad and begin using it immediately.

Task: Start TOTAL for iPad

On your iPad's Home screen, locate the **TOTAL** icon and tap it. Now, you'll see TOTAL for iPad's **Home screen**. This is where you'll begin all your tasks in TOTAL for iPad.

Getting Started

The **Home screen** is used for creating and opening files, syncing with your desktop PC, and a few other functions.

Syncing and Pairing

To sync TOTAL for iPad with WinTOTAL, TOTAL, or TOTAL for Tablet PC, you'll first need to "pair" the TOTAL for iPad with your desktop software. To do so, first tap **Desktop Sync** on TOTAL for iPad's Home screen. Then, tap **Not Established**, and you'll see a 4-digit number: write it down or keep it on the screen. Then, in WinTOTAL or TOTAL for PC, right-click the folder you want to sync with TOTAL for iPad, and choose **Create TOTAL for Mobile pairing folder**. You'll be prompted to enter the 4-digit code you saw on your iPad. When you do, pairing is established. From here, it's just a matter of syncing the files between your PC and your iPad as needed so you can access the reports in both places. The entire process is done wirelessly over any Internet connection (Wi-Fi or 3G), so you don't need to be near your PC to sync your reports from the field.

For detailed pairing and syncing info, visit <http://bit.ly/iPadSync>.

Creating Files

It's easy to create files in a desktop application like WinTOTAL or in TOTAL and then synchronize them down to your iPad — that way you can merge in templates or start with an old file. However, while in the field, you can also create a new file in TOTAL for iPad.

Task: Create a New File

Open TOTAL for iPad and tap **Create New File**. In the screen that appears, type a **Description** and select a **Layout** from those provided. Once you're done, tap **Create File** to create the file. At this point, the file has been created.

Now you'll see the **Order** screen, where you can enter property and assignment info, as well as instructions from the client.

The way you enter this information is same as with any iPad app: tap the intended field and enter the data using the standard iPad keyboard. However, a more convenient option is to use QuickLists.

Task: Create a QuickList Item

QuickLists can speed up your data entry because you enter data using "picklists" rather than re-typing commonly used text.



The screenshot shows the 'Order' screen in the TOTAL for iPad application. The screen is divided into two main sections. On the left is a 'QuickLists' section with a list of 'Property Type' options: 'Single Family', '2-4 Unit Building', and '5+ Unit Building'. The 'Add' button next to 'Single Family' is highlighted with a red circle. On the right is the 'Property Information' form, which includes fields for 'Address' (11564 NW 5th Street), 'City' (Yukon), 'County' (Oklahoma), 'State' (OK), and 'Zip' (73099). Below this is the 'Map & Geo Data' section with fields for 'Property Type' (Single Family), 'Legal Desc.', 'Lat.', and 'Long.'.

To create a QuickList item, tap any field then tap **Add** in the **QuickLists** section on the left, as shown.

When you do, you'll be prompted to enter the **QuickList Text** (the text that will appear in the field on the report) and a **Short Name** (used to identify this QuickList item in the list.) When you've entered the info, tap **Save** in the upper-right to return to the previous view.

Getting Started (cont'd)

Task: Use a QuickList Item

When you're ready to use a QuickList item to enter text in a field, simply tap the field to view the QuickList items available for that field. When you see the QuickList items for that field, tap the one you want to use. The text will be inserted into the field.

Task: Edit a QuickList Item

To change a QuickList item, tap **Edit** in the QuickList section. Then, tap the QuickList item you want to change. You'll see the same screen you used to create the QuickList item, where you can make any changes. When you're done, tap **Save** in the upper-right.

Task: Delete a QuickList Item

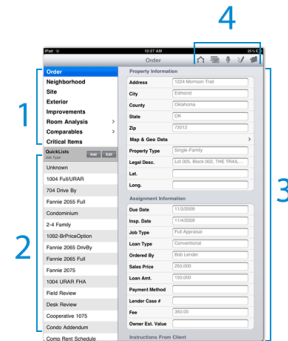
To delete any QuickList item, tap Edit in the QuickList section. When you do, you'll see a **red circle** to the left of each item. Tap the circle to the left of the QuickList item you want to delete, then tap the **Delete** button that appears to the right of the item.

The process for creating, editing, deleting, and using a QuickList item is the same throughout TOTAL for iPad.

Data Gathering

TOTAL for iPad lets you gather most of your report data in the field using the Data Gathering screen, which has four main parts:

1. **Navigation**
2. **QuickLists**
3. **Data Entry**
4. **Toolbar**



Task: Enter Some Data

Tap **Neighborhood** in the navigation in the upper-left, and you'll see fields on the right that can be used to enter the data for the neighborhood. As before, you can enter data using the keyboard, QuickLists, and sometimes checkboxes. Continue through each section of the report until you've gathered all the intended data.

Map and Geo Data

When entering **Map and Geo Data**, TOTAL for iPad will use the iPad's GPS to geocode the address at your current location. You can also use the exact latitude and longitude instead of the geocoded address. This saves time and makes sure you get accurate location information for your report.

Room Analysis

In the Room Analysis section, you can add rooms or view those already in the report. When there are rooms in the report, you can add details for each of them – including photos. For now, don't add a room here because your rooms will be added for you automatically as you sketch them.

Task: Enter a Comparable

Select the **Comparables** section on the left to add a comparable to the report. When you do, you'll see the **Add Comp** button, which you'll tap to add a comparable to the report. After you've added the comp, tap the name of the comp to enter all the details about the comp, including photos from your iPad's Photo Albums or photos taken using your iPad's camera (if available).

Sketching

To work in a sketch, tap the **Sketch** button on the toolbar at the top-right of an open report.



When working in a sketch, there are 4 basic modes that can be selected using the buttons at the top-left of the sketch view:



Draw Exterior Walls



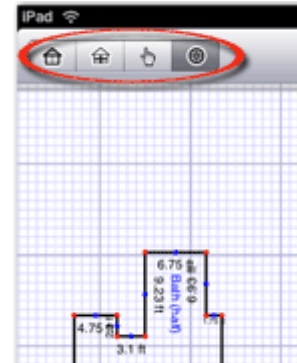
Draw Interior Walls



Modify Sketch



Place Cursor



Sketching (cont'd)

Task: Place Cursor

Tap the **Place Cursor icon** at the top-left of the screen. Now, you can place your cursor in one of three ways:

- **Tap** anywhere on the canvas to move your cursor to that spot instantly, then use the arrow keys to nudge it to exactly the right spot.
- **Tap and hold** to magnify for more accurate placement.
- **Enter a number** on the sketch keypad at the bottom of the screen, and **swipe your finger** in any direction.

Task: Draw an Exterior Wall

Tap the **Draw Exterior Walls icon** in the upper-left. If the sketch keypad is not displayed, simply tap the canvas to show it. Then, **enter the length** of the wall (let's say 100, for now) and **swipe your finger** in the direction the wall should extend. When the wall appears, **enter the "rise"** of the wall and swipe in any direction to create an angle, if needed. When you're finished drawing the wall, tap the **sketch canvas** or **tap enter** to complete it, and the line will turn from green to black. At this point, you can add an adjacent exterior wall by entering a number and swiping in the direction the wall should extend. Keep in mind: drawing interior walls works the same way.

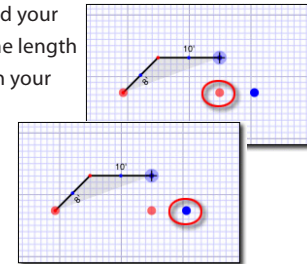
Pop Points

After you've drawn two or more walls, a couple of different "dots" will appear around your sketch. **Red dots** help you match a related wall's measurements, while **blue dots** help you create matching angles. When you tap these dots while drawing a wall, your wall will extend to the dot's location, which makes it much easier to "square off" your sketch.

Task: Use a Pop Point

Once you've drawn two or more walls, try the following:

- Tap any **red dot** to extend your wall so that it matches the length of another wall already in your sketch.
- Tap any **blue dot** to extend your wall so it matches another angle already in your sketch.



Another type of pop point appears at the end of a wall or at the intersection of two walls. Tap the **Place Cursor icon** then tap any of these dots to accurately place your cursor.

If there is a **pulsating dot** at the end of a wall, it indicates the wall is still “open” so you can enter a length and swipe to continue drawing another wall at that point.

Go ahead and complete a rectangular or square area using exterior walls at least 50 feet long.

Zoom and Pan

To make your sketch easier to see and work with, you can zoom and pan much like you would with any other iPad app.

Task: Zoom In and Out

Place two fingers on the screen, then spread them apart to zoom in or pinch them together to zoom out.

Task: Autofit Your Sketch

Double-tap any blank area of the sketch canvas to fit the entire sketch in the visible area. This is the easiest way to get a “bird’s eye” view of your sketch.

Task: Pan Your Sketch

Place two fingers on the screen and hold. Then, move both of your fingers in the direction you need to pan the sketch.


Task: Draw Interior Walls

Tap the **Place Cursor** icon and use a pop point to place your cursor at the corner of your sketch. Then, tap the **Draw Interior Walls** icon and use what you’ve learned so far to draw a room in your sketch.

Modifying Walls

There are several things you can do with a wall that you’ve already drawn. These modifications can be performed on exterior or interior walls.

Task: Delete a Wall

Tap the **Modify Sketch** icon then tap any wall to select it, which will turn the line green. Now, on the sketch keypad at the bottom of the screen, tap the **delete button**.  This will delete the wall.

Task: Undo an Action

Since you just deleted a wall, tap the undo button on the sketch keypad, then tap **Undo Remove Line**. The line you deleted will be restored. You can use the **undo** button at any time to undo the last item, and you can undo multiple items by repeatedly tapping undo.

Sketching (cont'd)

Task: Change a Wall Length and Angle

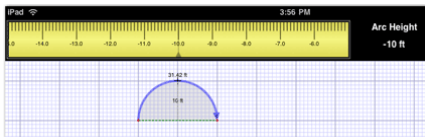
Tap the **Modify Sketch icon**. Tap the beginning of any line in your sketch and the line will turn green with an arrow indicating the direction of your adjustments. At the same time, the angle and length adjustment controls will appear at the top of the screen, as shown.



Use the controls to adjust the length and/or angle of the wall, then tap anywhere on the canvas to “lock” the changes.

Task: Draw an Arc


Tap the **Modify Sketch icon**. Then tap the blue dot that appears at the mid-point of any of the walls in your sketch. The **Arc Height** control will appear at the top of the screen, as shown. Use the controls to adjust the height of the arc, then tap anywhere on the canvas to complete the changes.



Managing Areas

You may have noticed that the first time you drew an area that was completely closed by exterior walls, TOTAL assigned an **area type**. If this was the first area you completed in this sketch, TOTAL will assume this is the first floor, and applies that label. However, you may need to change the area type for any part of your sketch.

Task: Change an Area Type

Tap the **Modify Sketch icon**. Now, tap inside any area that is completely closed by exterior walls. The selected area will turn yellow. Tap the **Area icon**  at the top-right of the screen to display the **Area Type** window, where you can tap any area that appears in the list. When you do, a checkmark will appear next to the selected area. Now, tap anywhere on the canvas to close that window, return to the sketch, and see the change you just made. You can also use the Area Type window to change how any area is calculated for living area: simply tap any calculation type at the bottom of the Area Type window.

Cutting Out an Area

There are several ways to create an area that subtracts from the calculated living area, and you've already seen some of the tools used to do so. For flexibility, we'll look at yet another method. For an example, we'll create a garage that cuts out of the first floor.

Task: Draw the Garage

To the side of the area you've already drawn, draw a garage-sized area with exterior walls. After you complete the area, you'll automatically enter **Modify Sketch** mode. So, tap inside the garage area to select it, which will highlight the area in yellow. Tap the **Area icon** in the top-right, and select some type of attached garage from the list. Now you've drawn the garage and determined how it will be calculated in the area.

Task: Move the Garage

While still in **Modify Sketch** mode, tap and hold inside the garage. When it becomes highlighted with a darker color, drag your finger to move the garage to reflect its location on the property. Once you've moved it to its approximate location, you can let go. The highlight will change back to yellow. At this point, you can fine-tune the garage's location by tapping the arrow keys on the sketch keypad.

Task: Draw a Concrete Patio

Place your cursor along any exterior wall, preferably using pop points to increase accuracy. When you've placed your cursor on the exterior wall, you'll automatically enter **Draw Exterior Walls** mode. So, draw a patio-sized area that extends outside the existing area. When you close the area, you'll notice that TOTAL has automatically defined the area as a "Concrete Patio." Of course, if you need to change the area type, you can do so now using the methods previously discussed.


Task: Draw an "Open to Below" Area

Place your cursor anywhere inside your existing sketch. Then, using **Draw Exterior Walls** draw an area inside the sketch. You'll see that TOTAL automatically makes the area **Open to Below** along with the proper area calculation. Again, this automation is simply for convenience, and you can modify the area type, if needed.


Labels and Symbols

TOTAL for iPad lets you place labels and symbols on your sketch in the field. You can select from the existing library of symbols and labels, and you can even add your own labels to the available list.


Task: Place a Label

Tap the **Labels icon**  in the toolbar, which will open the **Labels window**. Select any label from the list (for instance, the name of the room you drew using interior walls earlier) and the Labels window will close. Now, tap the sketch inside the room at the label's intended location, and the label will appear.

Task: Create a New Label

Tap the **Labels icon**  to display the **Labels window**. Then, tap the **plus sign** in the upper-right of the Labels window. You'll be prompted for a label name, which you can enter using the iPad keyboard. When you're done, tap the **Labels** button in the upper-left corner of the Labels window to return to the list of labels, where you can use your newly-created label.

Task: Edit or Delete a Label

Tap the **Labels icon**  to display the **Labels window**. Then, in the upper-left corner of the Labels window, tap **Edit**. Now in Edit mode, you can tap any label to edit it, or tap the red circle to the left of the label to delete it. When you're finished, tap **Done** in the upper left corner of the Labels window.

Task: Move a Label

In **Modify Sketch** mode, tap and hold any label on your sketch. When you do, the magnifying glass will appear, and you can drag the label to its intended location. When you release the label, you'll see that it's still selected (indicated by a yellow highlight.) While the label is selected, you can fine-tune its position by tapping the arrow keys on the sketch keyboard.


Remember Room Analysis?

As mentioned earlier, TOTAL for iPad will automatically add rooms to the Room Analysis section of the report as you sketch and label them. So, since you added a room to your sketch (using interior walls and a label) you can now add details for that room in the Room Analysis section.

Task: Add Info to the Room Analysis

In your sketch, double-tap any room label that you applied. For instance, if you applied a label of "Bedroom" to a room drawn with interior walls, you would double-tap the "Bedroom" label. This will display the properties for the room, where you can enter detailed information, including photos.

Task: Place a Symbol

Tap the **Symbols icon**  in the upper-left of the screen to display the **Symbols window**. Select any symbol category in the list, then tap any symbol in the chosen category. This will return you to your sketch, where you can tap to place the symbol in its intended location.

Task: Move a Symbol

Once you've placed a symbol on the sketch, you'll automatically be in **Modify Sketch** mode. In this mode, you can either **tap and hold** a symbol to drag it to its intended location, or, with the symbol selected, tap the arrow keys on the sketch keypad to fine-tune the symbol's location.


Task: Rotate and Scale Symbol

After you've placed a symbol on the sketch, you'll be in **Modify Sketch** mode and the symbol's **rotation and scale controls** will be displayed at the top of the screen. Use these controls to adjust the size and orientation of the symbol. Of course, you can make these adjustments for any symbol by tapping the symbol while in Modify Sketch mode.

Favorite Symbols


Since the symbol library is quite large, you can mark your most frequently symbols to make them more easily accessible.

Task: Mark a Symbol as a Favorite

Tap the **Symbols icon**  to display the **Symbols window**. Tap the category of the symbol you want to mark, and scroll so you can see the symbol in the list. Then, tap the star to the right of the symbol to mark it, which will turn the star yellow, as shown.




Task: Use a Favorite Symbol

Tap the **Symbols icon**  to display the **Symbols window**. Then, tap the **Favorites** category at the top of the list to see all the symbols you've marked as favorites. Tap any of them to return to the sketch, where you can tap to place the symbol.

Photos

Whether your iPad has a camera or not, you can use TOTAL for iPad to add photos to your report data. Of course, if your iPad does have a camera, you'll be able to take photos in the field and include them in your report.

Task: Add a Subject Photo

Tap the **Photos icon**  at the top-right of the screen to view the photos in the report, if there are any. Then, tap the **camera icon** at the top-left of the screen. If your iPad has a camera, you'll be prompted whether to **Take Photo** or **Choose Existing**.

- Tap **Take Photo** to snap a new photo with your iPad's camera. After you do, tap **Use** to accept that photo or **Retake** to take a different photo.
- Tap **Choose Existing** to select an existing image in your iPad's photo album. If your iPad doesn't have a camera, this selection is already made for you. Browse your photo albums and tap the intended photo.

After you've taken a new photo or chosen an existing one, you'll see the **Edit Photo Info** dialog where you can choose the type of photo you're adding (Front, Rear, Street, or Interior) as well as the **Address** and **Description**. Note that after you select the **Type** of photo, the subject's address will automatically be entered, but can be edited by tapping the field in the Edit Photo Info window. When you're satisfied with the information you've entered for the photo, tap **Save** in the upper-right corner.


Task: Edit or Delete a Photo

While viewing the photos in the report, tap any photo to view it in full screen. Then, tap **Edit** in the upper-right of the screen. In the **Edit Photo Info** window that appears, you can change any information that you entered for the photo. You can also remove this photo from the report by tapping **Delete Photo**. If you've changed any of the photo's information, tap **Save** in the upper-right of the Edit Photo Info window.


Pages

If you're sketching a multi-level property, or just a particularly complex sketch, you might need to use multiple pages for an accurate depiction.

Task: Create a New Sketch Page

Tap the **Pages icon**  at the top of the screen. When the **Pages window** appears, tap <New Page> to add a new, blank page to your sketch.


Task: Navigate the Pages in Your Sketch

Tap the **Pages icon**  then, in the **Pages window** tap the page you would like to view.

Voice Recorder


Using the iPad's built-in mic, you can record voice notes in the field to be used or transcribed later.

Task: Record a Voice Note

Tap the **Voice Recorder icon**  in the toolbar, which will open the **Voice Recorder window**. Tap the **Record button** to begin recording. You can tap the **Pause button** to momentarily stop recording, then tap it again to resume recording in the same file. When you are completely done recording, tap the **Stop button**.

When you do, you'll see a new voice recording appear in the list at the bottom of the Voice Recorder window. The name of the recording will reflect the section of the report you were working in when you began recording.


Task: Delete a Voice Recording

Tap the **Voice Recorder icon**  to display the Voice Recorder window. In the list of recordings at the bottom of that window, **swipe left** on any recording to display the **Delete button**. Tap the Delete Button to confirm deletion of the recording.

FieldPad

Using the FieldPad, you can create a sketch much as you would with a notepad and pencil, but using your finger and the iPad's screen instead.


Task: Create a FieldPad Sketch

Tap the **FieldPad icon**  in the toolbar, which will display the FieldPad in full screen. You can immediately begin sketching by drawing on the iPad's screen with your finger.

Task: Undo Drawing

When sketching in FieldPad, tap the **Undo** button at the top of the screen to **undo the last stroke** of your drawing. A prompt will confirm that you want to undo. You can undo multiple strokes by tapping the Undo button multiple times.

Task: Create and Navigate Multiple FieldPad Pages

When sketching in FieldPad, tap the **plus sign** at the top of the screen to add a new, blank FieldPad page. Then, to navigate the pages that you've created, tap the **forward and backward buttons**  at the top of the screen.


Task: Delete a FieldPad Page

While working in a FieldPad page, tap the **Trashcan icon** at the top of the screen to delete the page you are currently viewing, then confirm the deletion. Tap **Close** in the upper-right when you are done.


File Management

When you're ready to save, close, or e-mail a file, you'll use the **File view** to do so.


Task: Save and Close Your Report

Tap the **File icon**  at the top-right of the screen, then tap **Save & Close**. Your file will be saved, and you'll be returned to TOTAL's Launch screen. On that screen, the report you just saved will be listed under **Recent Files**, where you can tap to open it once again.


Task: Save a Copy of Your Report

Tap the **File icon**  at the top-right of the screen then tap **Save As Copy...** You'll be prompted to **Save As Filename** — so just enter a name you want to use for the copy of your report. When you've typed the name, tap **OK**. The file will be saved, and your report will stay open.

Task: E-Mail Your Report

Tap the **File icon**,  then tap **E-mail File To...** Choose whether to send the file in **PDF Format** or **XAP Format**. When you do, TOTAL will go to work creating the file, and when it's done, the iPad's e-mail app will open with the file attached, ready to be addressed and sent. Of course, your iPad will need a network connection to send the message.

Task: Discard Your Changes and Close the Report

Tap the **File icon**,  then tap **Discard Changes & Close**. After you tap to confirm that you want to discard your changes and close, any changes made since you started or saved the file will be discarded, and the report will be closed. You will be taken back to TOTAL's Home screen.