

OADI Envelope Uploader User's Guide

(v. 0.9.5.0)

What is the Envelope Uploader?


The OADI Uploader is a utility designed to upload files to AppraisalPort and DataExpress directly from your appraisal form application. In addition, the uploader can filter a custom list of items to exclude from uploading to DataExpress. This gives the appraiser control of the information transmitted to DataExpress.

The screenshot displays the OADI [FNC Envelope Uploader] V. 0.9.5.0 application window. The title bar includes the application name and version. The menu bar contains: Forms, Delete, Save, Filter, Send, Connections, Invoice, PDF, and a help icon. The main content area shows a 'Uniform Residential Appraisal Report' form. The form includes fields for Property Address (1015 Waterwood Pkwy), City (Edmond), State (OK), Zip Code (73034-6327), Borrower (Jones), Owner of Public Record (Smith), County (Oklahoma), Assessor's Parcel # (11350972), Tax Year (2000), R.E. Taxes (\$ 360.35), Neighborhood Name (Park Ridge), Map Reference (MSA 4200), and Census Tract (1082.01). It also features checkboxes for Occupant (Owner, Tenant, Vacant), Property Rights Appraised (Fee Simple, Leasehold, Other), and Assignment Type (Purchase Transaction, Refinance Transaction, Other). A table at the bottom of the form shows Neighborhood Characteristics (Location: Urban, Suburban, Rural) and One-Unit Housing Trends (Property Values: Increasing, Stable, Declining). The status bar at the bottom indicates 'Report.env', 'CAPS', and the date/time '8/14/2009 1:53:53 PM'.


Figure 1

After performing the necessary steps to upload your appraisal report by using your forms software, the FNC Envelope Uploader will be shown containing your report. Figure 1 shows the appearance of the Envelope Uploader presented to the appraiser.

The Forms Button

Click on the **Forms** button  to view other forms that may be included in the document. If there is more than one report included in the document, just click on the report that you want to view and it will be displayed in the previewer.

The Delete Button

The **Delete** button  will remove files from the file list within the uploader. When a form is prepared for uploading from within the appraisal document, many files are loaded into the file list. If the appraiser determines a file does not need to be uploaded, the files can be removed. *NOTE: Because the relationships of these files are established by the appraisal form application, it is recommended that the **Delete** button be used with caution.*

To delete a file, select the file from the file list. Once the file is highlighted, click the **Delete** button. You will be prompted to confirm your selection. Click **OK** and the file will be removed from the file list. The image below is the Confirmation dialog box.

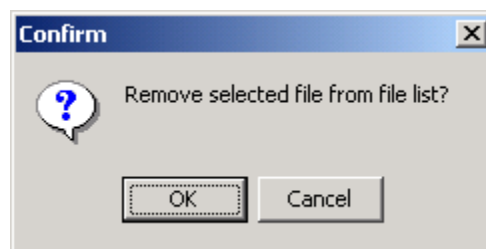



Figure 2

Deleting the file from the file list does not delete the file from your computer. It simply removes the file from list of items to be uploaded.

The Filter Button

The **Filter** button  allows you to create and/or edit a filter for files to send to DataExpress. This filter allows the appraiser to specify exactly what information gets uploaded to the DataExpress database, giving the appraiser control of the information made available to DataExpress.

The Envelope Uploader comes with one filter pre-installed labeled the default. This filter has not been modified but serves as the template from which you will be able to create other filters.

Applying a Filter

Applying a filter only affects data being uploaded to DataExpress. To apply or edit/create a filter, first click on the **Filter** button.

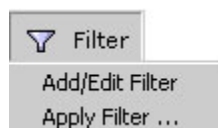


Figure 3

The application comes with one filter pre-installed labeled the Default. This filter has not been modified but serves as the template from which you will be able to create other filters. If you are applying the default filter, select the filter from the window that appears and click the OK button.

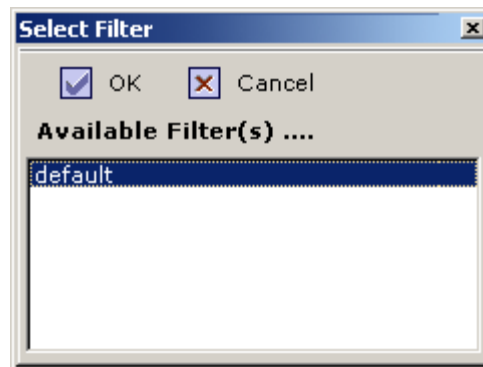


Figure 4

To edit the default filter, edit a filter you have already created, or add a new filter to the filter list, you will first need to click on the Add/Edit Filter button. Clicking this button will bring up the **Select Filter** window (Figure 4), shown below. To edit an existing filter, including the default filter, simply click on the name of that filter and then click **OK**. To add a new filter to the filter list, type a name for that filter in the **Create a new filter** field and then click on the + button that is located at the end of that field. Either of these processes will open the **Edit DataExpress Filter** window.

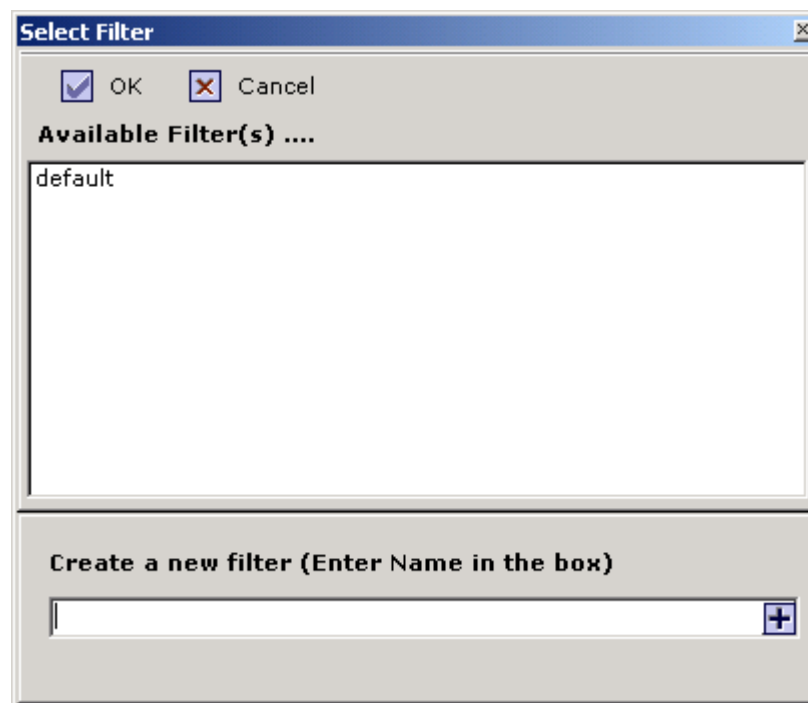


Figure 5

The **Edit DataExpress Filter** window, pictured below, is where you decide what data within your report you do not want to send to DataExpress. To do this, simply scroll through this list of fields that are found in your report and check off the boxes next to those fields of data that you do not want to send by clicking in them.

The small + sign next to the check boxes of certain categories of fields denotes that the category has subfields associated with it. Clicking on the + sign will expand the category, showing exactly which subfields are associated with it, and allowing you to select these fields. Once you have clicked on one of these + signs and expanded the

category, the + sign will change to a - sign, as seen in the image below. Clicking on this - sign will collapse the field. If you check the box of one of the categories that contains subfields, all of the subfields within that category will be automatically selected as well, filtering out the data associated with these subfields.

The first item under Form Info, **_OPTOUT**, allows the appraiser to opt out of allowing your data to be used with any sort of aggregate data. This means that your data will only be used as an appraisal data and will **not** be blended or used in analytics.

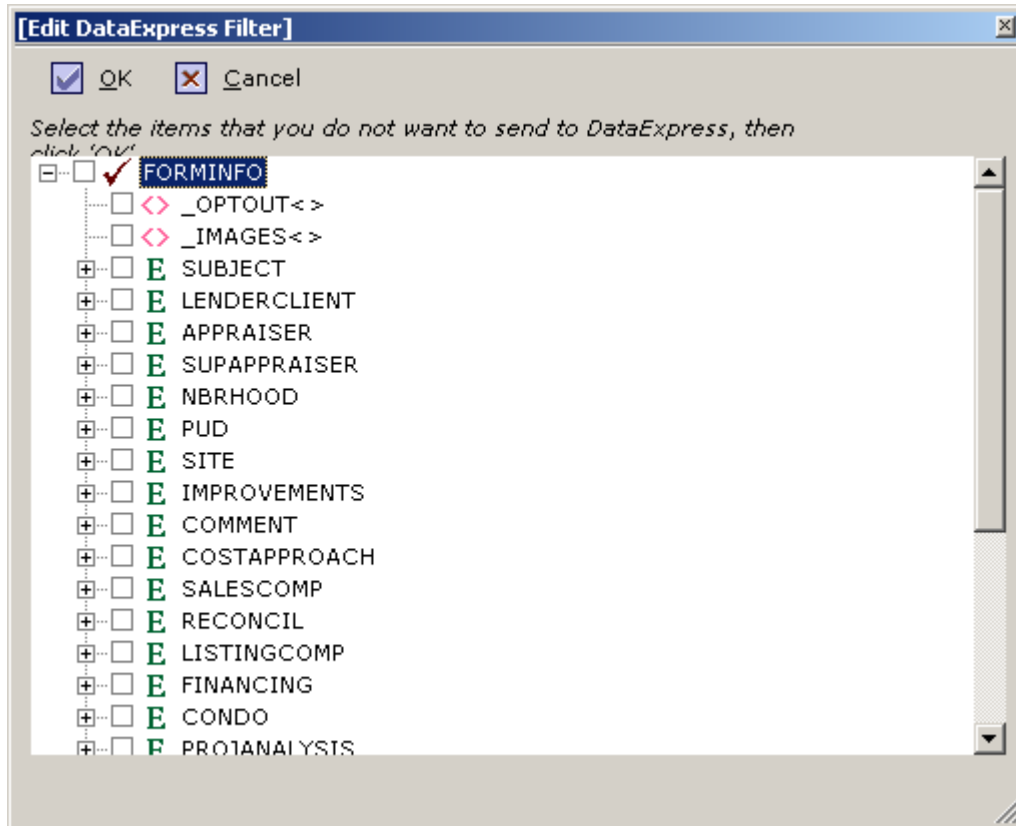


Figure 6

Once the appraiser has selecting all data to be filtered, simply click on the **OK** button to save the filter. Now that you have saved the filter, you would apply the filter in the same way outlined above for applying the default filter, selecting the filter you just edited or created.

The Send Button

The **Send** button allows you to upload to AppraisalPort, DataExpress, InspectionPort or TitlePort. Click on the Send button to view the menu. (Figure 7)

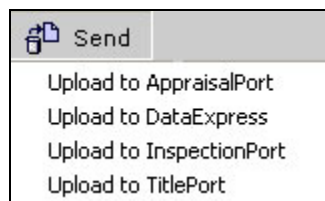

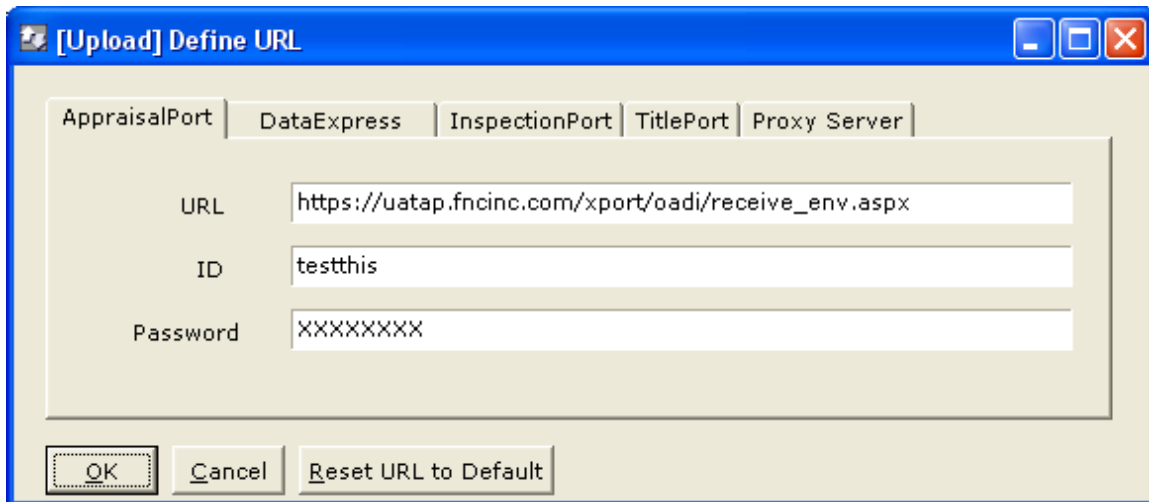


Figure 7

The Connections Button

The **Connections** button  can be used to configure the URLs for uploading to AppraisalPort, DataExpress, InspectionPort and TitlePort. This configuration consists of entering your account information (URL, User ID, and password) for AppraisalPort, DataExpress, InspectionPort, TitlePort, and, if necessary, your proxy server. Clicking on the **Connections** Button will bring up a new window that initially has fields for your AppraisalPort user account (Figure 8).

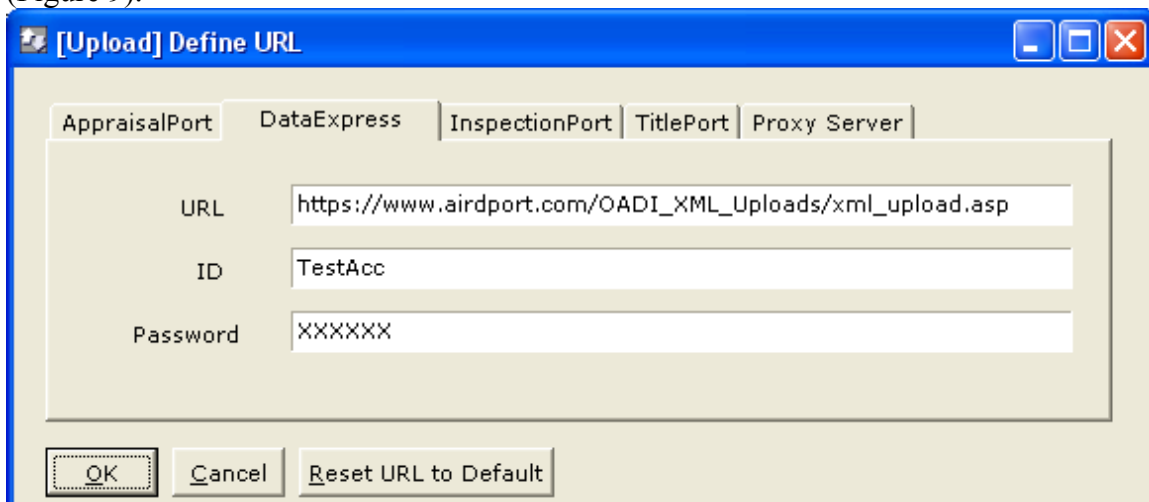


The screenshot shows a dialog box titled "[Upload] Define URL" with a blue title bar and standard window controls. It features five tabs: "AppraisalPort", "DataExpress", "InspectionPort", "TitlePort", and "Proxy Server". The "AppraisalPort" tab is selected. The dialog contains three text input fields: "URL" with the value "https://uatap.fncinc.com/xport/oadi/receive_env.aspx", "ID" with the value "testthis", and "Password" with the value "XXXXXXXX". At the bottom, there are three buttons: "OK", "Cancel", and "Reset URL to Default".

Figure 8

The URL in Figure 8 is an example URL for uploading files to AppraisalPort. The appropriate URLs are made available to the forms vendors for automatic insertion into the URL text entry. *If the URL is blank, please contact the appraisal form vendor or FNC for this URL.* Next, the appraisal needs to insert his/her AppraisalPort ID and Password. Please verify that these are correct.

Afterwards, click on the DataExpress Tab for the DataExpress configuration fields (Figure 9).



The screenshot shows the same "[Upload] Define URL" dialog box, but with the "DataExpress" tab selected. The "URL" field now contains "https://www.airdport.com/OADI_XML_Uploads/xml_upload.asp", the "ID" field contains "TestAcc", and the "Password" field contains "XXXXXX". The "OK", "Cancel", and "Reset URL to Default" buttons remain at the bottom.

Figure 9

As with the AppraisalPort tab, the appraiser should complete the URL, ID and Password entries for their DataExpress account. Figure 9 shows an example DataExpress entry.

If the appraiser's computer is on a secure network, a proxy server entry may be required. By clicking on the **Proxy Server** tab (Figure 10), a dialog box will appear with similar

configuration fields as shown with AppraisalPort and DataExpress. If you are not using a proxy server, simply click on the OK button to save all the connection information. *If you are unsure of if you are using a proxy server, either leave this information blank or contact your local network administrator.*

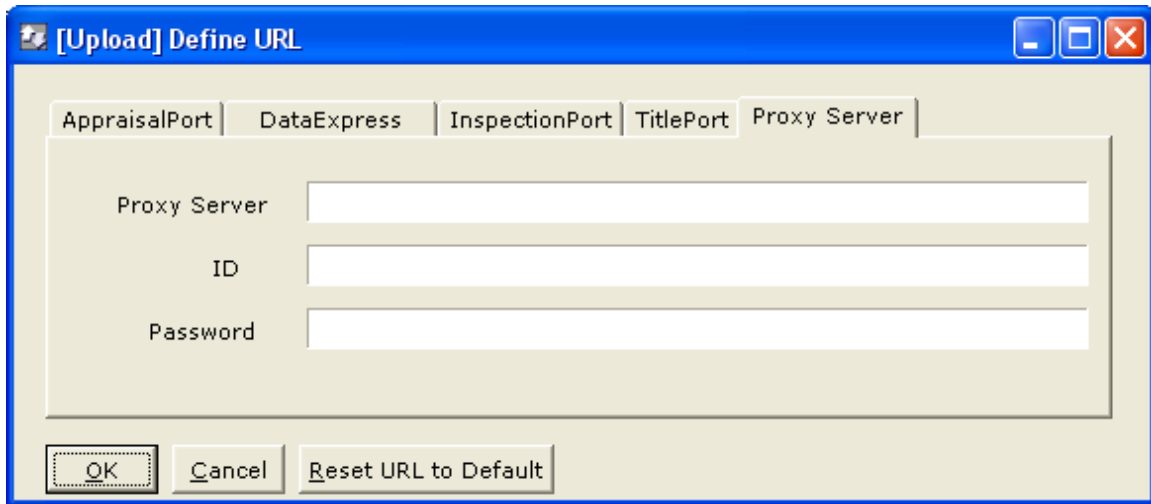




Figure 10

The Invoice Button

The **Invoice** button  allows you to create and attach an invoice to be sent with your AIReady report, if an invoice has not already been included. You can verify whether your AIReady report contains an Invoice, by clicking the **Forms** button. If an invoice needs to be created and attached, click on **Invoice** and select **New**. You will receive a message providing instructions for attaching the invoice once you have finished creating it. Click **OK** on this message and you should see the AIReady invoice. Fill all required and any desired fields in the invoice. Now that the invoice has been created, you must attach this invoice to your report. To do so, click the **Invoice** button again, and this time, select **Attach to Report**. You will receive a message confirming that your invoice has been attached, and instructions for viewing your newly created and attached invoice.

The PDF Button

The **PDF** button  is provided to you as a convenience in generating your AI Ready report into the PDF format. This PDF will mirror the PDF viewed from the AI Ready ENV by your client.

After reviewing your report in the uploader, click on the **PDF** button. A pop up (Figure 11) will show letting you know you are about to create your PDF. Click **OK**. In the uploader window (Figure 12) click on **Display your AI Ready PDF** and your report will open up as a PDF document. You will also find in this window (Figure 12) other links for additional AI Ready information.

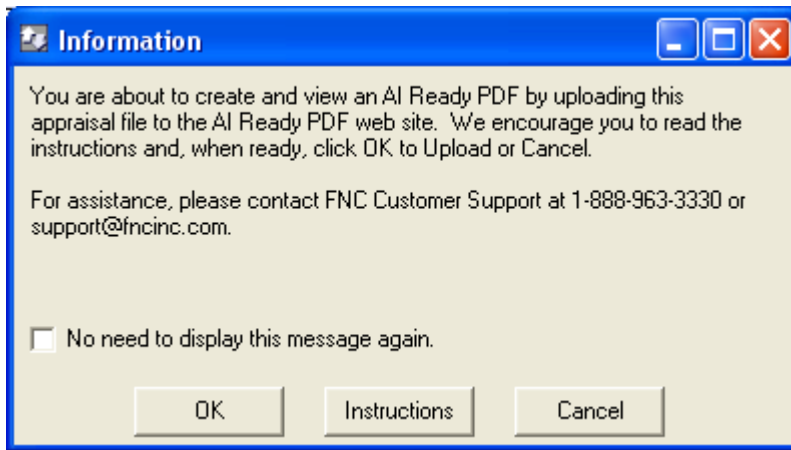


Figure 11

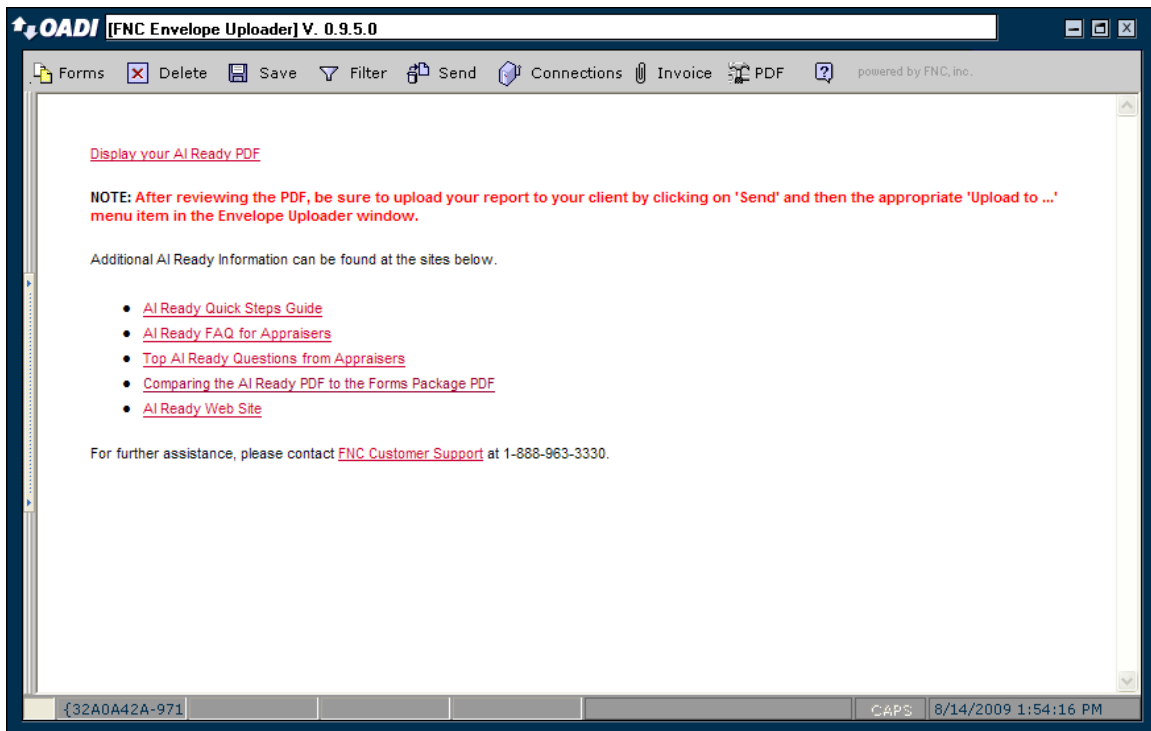


Figure 12

Once you have the PDF open, you can either print it out as a hard copy and/or save the PDF to your computer. After reviewing the PDF, be sure to upload your report to your client by clicking on **Send** and then the appropriate 'Upload to ...' menu item in the Envelope Uploader window.

The Help Button


The **Help** button  contains Online Help and the Submit Trouble Ticket tool. These features are designed to provide detailed information about AIReady and using the Envelope Uploader.

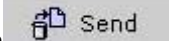


Figure 13

The 'Submit Trouble Ticket' tool, allows you to send questions regarding any Uploader issues, directly to the AppraisalPort Customer Support team. Using this tool ensures the Support team has the information necessary to provide a speedy and accurate response to your inquiry.

Uploading to AppraisalPort

Uploading to AppraisalPort has never been easier. The first step in this process is to verify the Connections information contains the correct URLs, IDs and Passwords as outlined in the Connections section of this document. Fortunately, the connection information is saved between sessions so the appraiser should only complete the task once.

Next, click the **Send** button . Figure 14 shows the resulting drop-down menu presented to the appraiser.

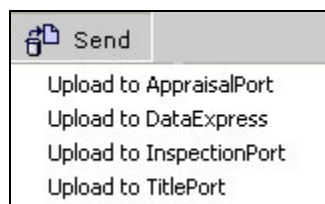


Figure 14

Within this menu you will want to select **Upload to AppraisalPort**. Once selected, the AppraisalPort Query window will appear (Figure 15). This window will list the jobs for an appraiser on AppraisalPort. If you would like to refresh this list, or if your job list does not automatically load, simply click on the **Get Job List** button. Once an appraiser has found the correct job order associated with the appraisal report, select it by clicking on it. When the correct job is selected, click **OK**. A confirmation box (Figure 16) will pop up for you to make sure you selected the correct order. Click **OK** to begin uploading the appraisal report and all associated images.



Figure 15

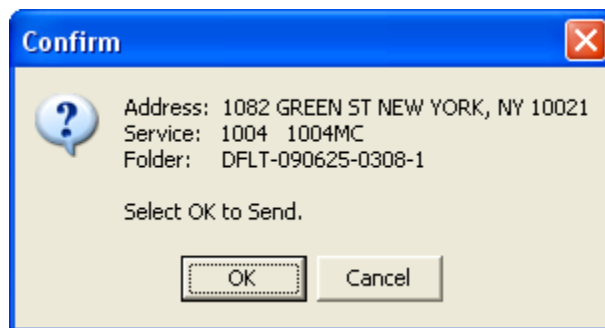


Figure 16

When the upload has begun, a progress bar will appear. When the upload is complete, the progress bar will disappear and a **Verify/Upload File** screen will appear within the Envelope Uploader window (Figure 17). The **Verify/Upload File** screen contains the folder number for the job, the receiving client, and the name of the file that was sent. This screen acts as your confirmation that your file has been successfully uploaded. You can print this screen out by right clicking on it and selecting print from the menu that appears.

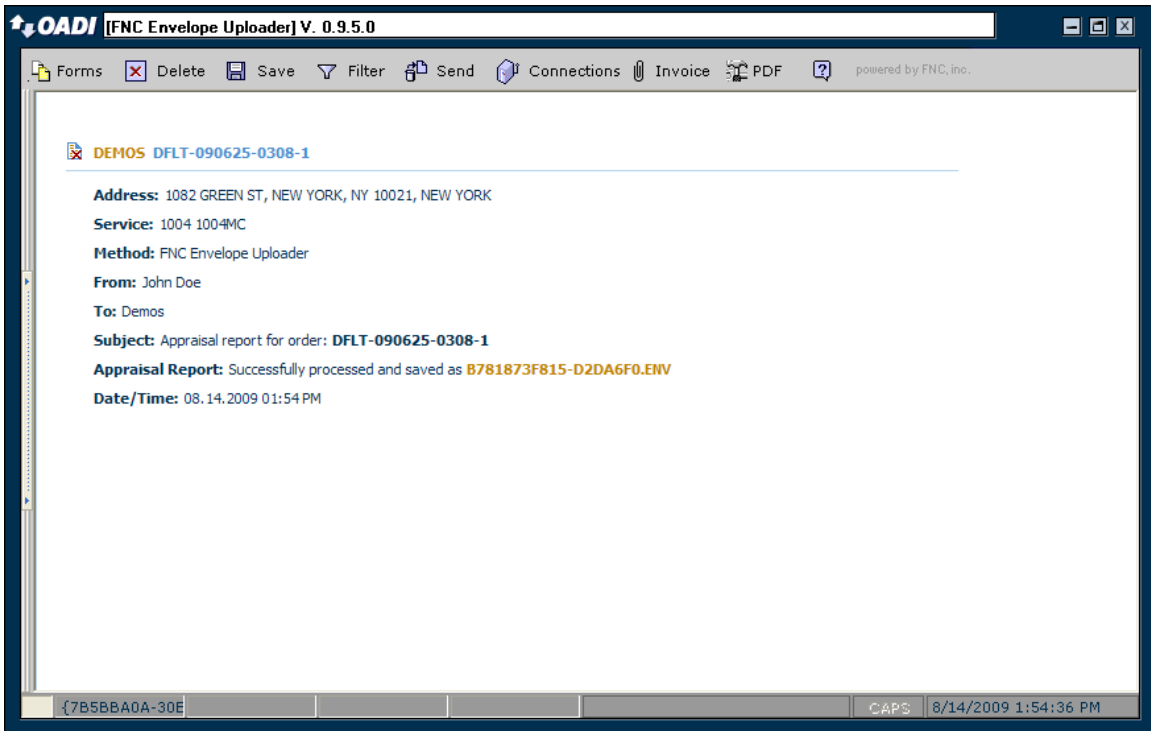



Figure 17

Uploading to DataExpress

The Envelope Uploader allows you to upload to DataExpress directly from your forms application. As with AppraisalPort uploads, confirm the AIRD and Proxy connections are correct to ensure the upload can occur.

First, the appraiser can choose to apply a filter for the data to upload. This is done with the **Filter** button  as discussed above the Filter section of this document.

Next, click the down arrow on the **Send** button (Figure 18) and select **Upload to DataExpress**.

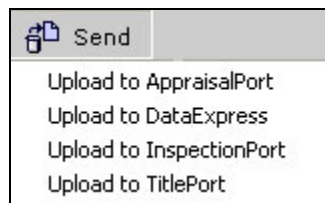


Figure 18

If you have not chosen to apply any filter to your appraisal report, the dialog box shown in Figure 19 will be displayed, stating that the default filter will be applied. If this is ok, simply click on the **OK** button and the upload will begin. If you would like to apply a different filter, however, simply click on the **Cancel** button and use the **Filter** button to create a new filter.

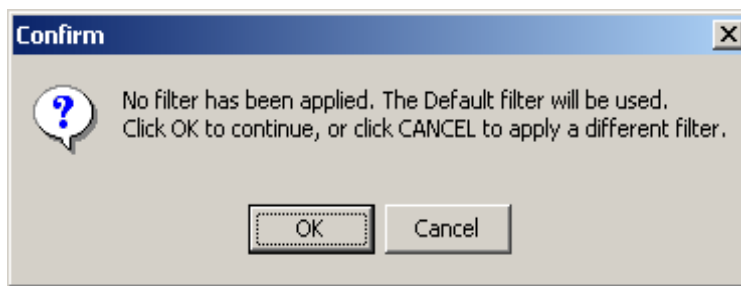


Figure 19

When the upload has begun, a progress bar will appear. When the upload is complete, the progress bar will disappear and a screen will be displayed informing you that the upload was sent (Figure 20). This screen acts as your confirmation that your file has been successfully uploaded. The appraiser can print this screen out by right clicking on it and selecting print from the menu that appears.

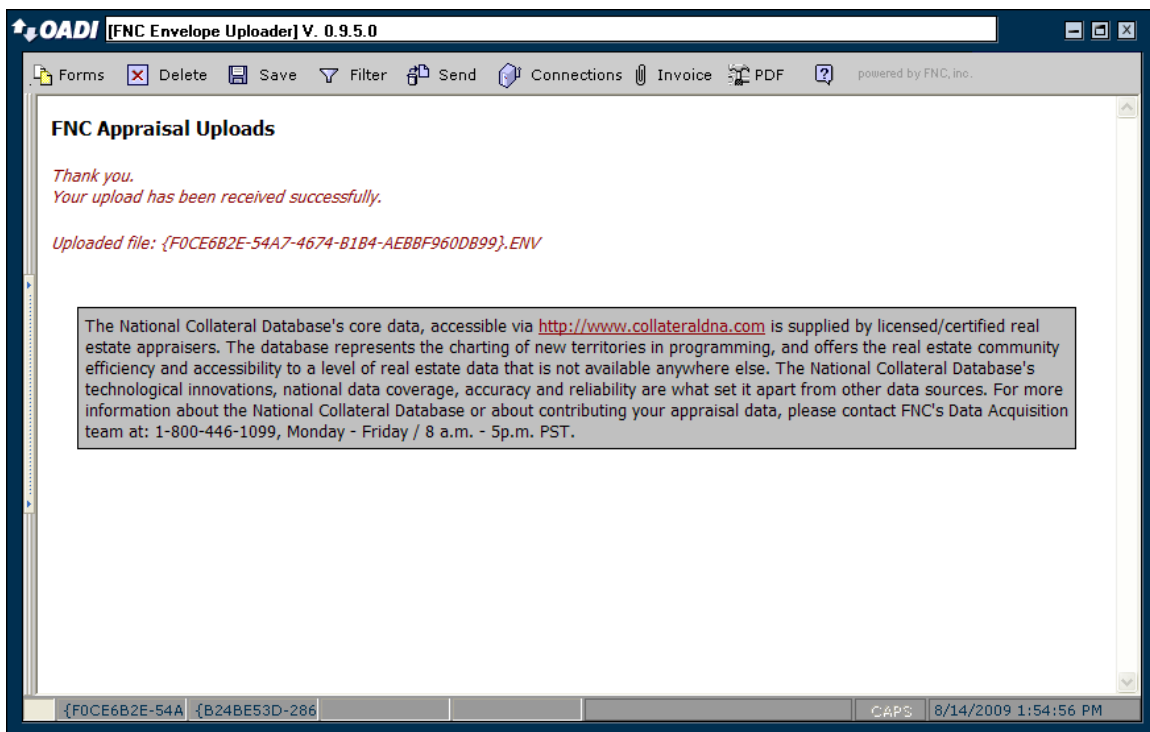


Figure 20