

Quest DataWeb



Title	DataWeb
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N.B. YOUR SYSTEM MAY DIFFER FROM THIS ILLUSTRATION.

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LOGIN MENU

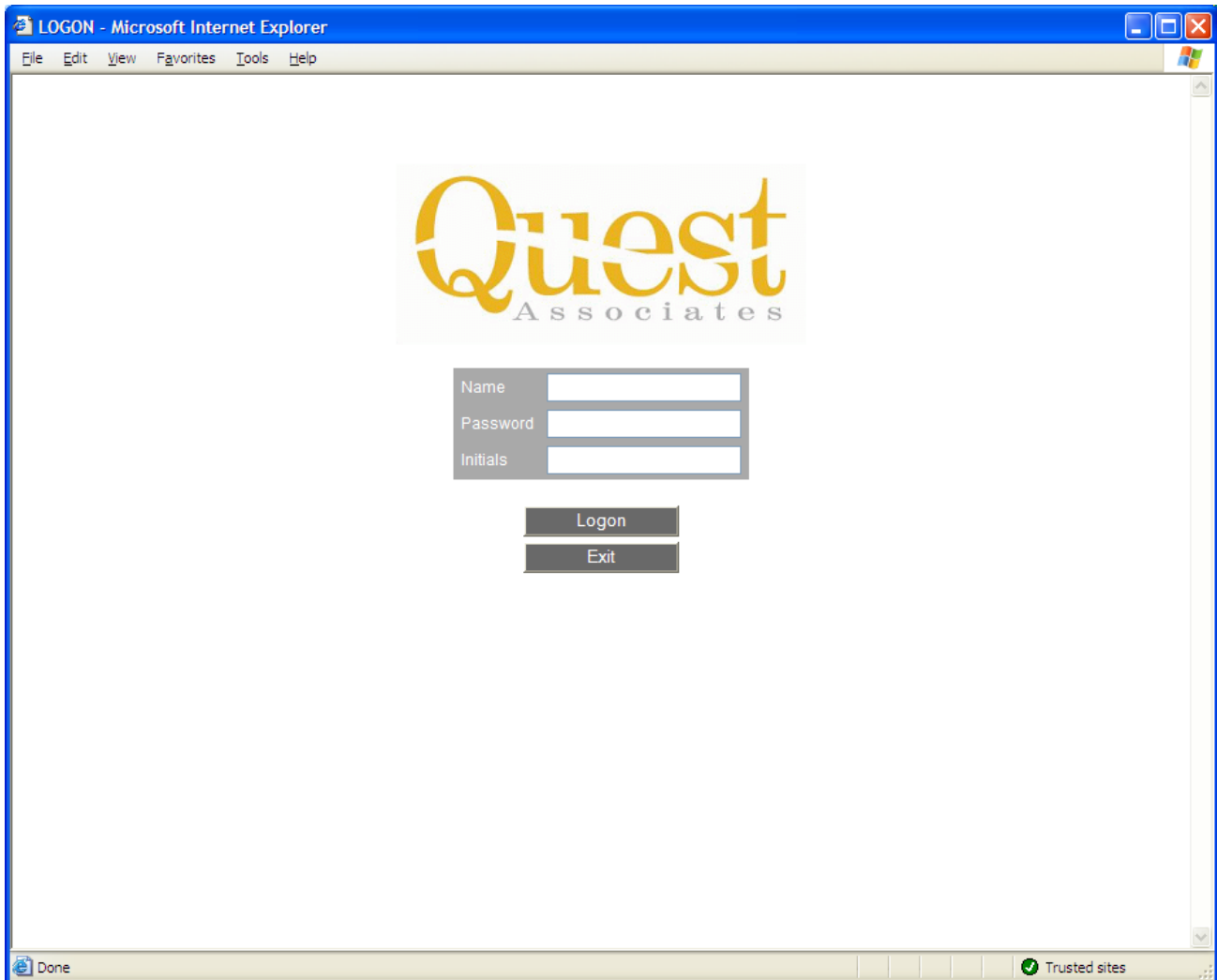


figure 1 Login Screen

This will allow multiple users to login with different user names and passwords. This will also assign a printer that has been selected for the user.

THE DATAWEB MAIN MENU

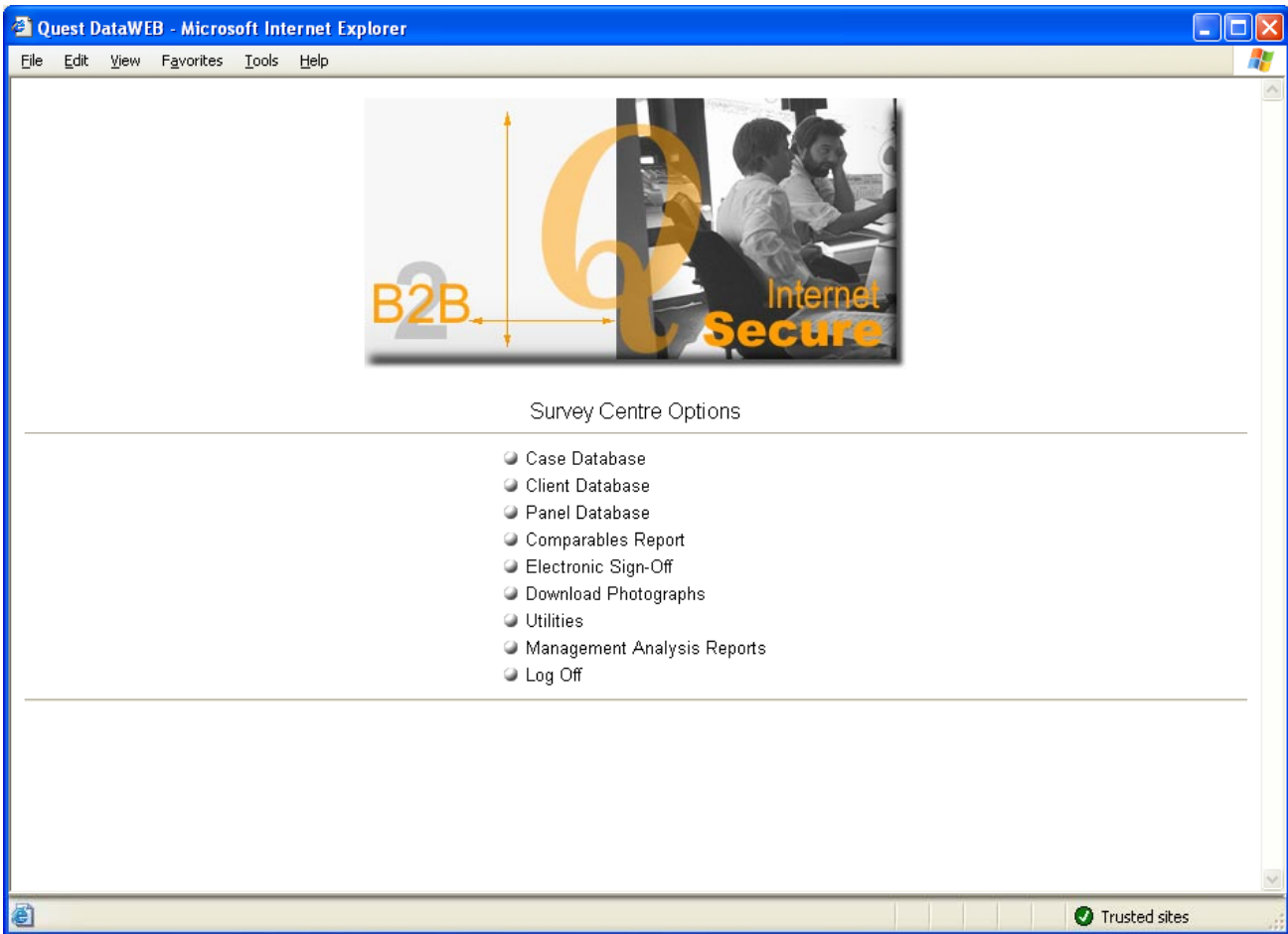


figure 2 DataWeb Menu

Case Database - the main database that contains your surveying jobs;

Client Database - the database of lenders, including branches and fees information;

Panel Database - the database of surveyors, including panel surveyors;

Comparables Report - Search/filter of the case database for comparable purpose;

Electronic Sign-Off - Signing off forms attached to electronic SPN cases;

Download Photographs - downloads photos so that they can be attached to certain forms;

Utilities – sub-menu containing utilities;

Management Analysis Reports - management reports;

Log Off - Closes down any browsers for DataWeb;

N.B. YOUR MENU MAY DIFFER SLIGHTLY FROM THIS ILLUSTRATION.

CASE ENQUIRY

CASE ENQUIRY

Post Code	RG12
Applicant	
Road Name	
Area	
Town	
System Ref	

figure 3 Case Enquiry

This part of the system is a quick search facility for particular criteria without stopping what you are currently working on e.g. typing a form or entering a new record.

In the example above, by entering a postcode of RG12 it will search the database and display the results with records that have a postcode of RG12. You can also access the Record Card results from here as well.

Searched on field 7 (POST CODE) for RG12

Remaining records not displayed
Found more than 25 records, please narrow the search

SysRef	Road	Post Code	Applicant 1	Applicant 2	Entry	Report Date	Address
SP000007	69	RG12	Mr M White		20 SEP 1994	21 SEP 1994	69 Woodcote Close Somewhere Dunnowhere
SP000013	1	RG12	Mr L Brown		20 SEP 1994	20 SEP 1994	1 Anywhere Street Bracknell
??000006	1	RG12	Mr J Bloggs		08 SEP 2003		1 Training Street Bracknell
ZY000026		RG12			04 NOV 2003		
ZY000027		RG12			04 NOV 2003		
ZY000030		RG12			07 NOV 2003	14 NOV 2003	
ZY000036	1	RG12	Mr J Bloggs		10 DEC 2003	10 DEC 2003	1 Training 3 Bracknell
ZY000037	1	RG12	Mr J Bloggs		10 DEC 2003	10 DEC 2003	1 Training 3 Bracknell
ZY000038	1	RG12	Mr J Bloggs		10 DEC 2003	10 DEC 2003	1 Training 3 Bracknell
ZY000041	1	RG12	Mr J Bloggs		10 DEC 2003	10 DEC 2003	1 Training 3 Bracknell
ZY000042	1	RG12	Mr J Bloggs		10 DEC 2003	10 DEC 2003	1 Training 3 Bracknell
ZY000047	1	RG12	Mr J Bloggs		07 JAN 2004	07 JAN 2004	1 Training Street Training
ZY000048	1	RG12	Mr J Bloggs		07 JAN 2004	07 JAN 2004	1 Training Street Training
ZY000049	1	RG12	Mr J Bloggs		07 JAN 2004	07 JAN 2004	1 Training Street Training
ZY000081		RG12			04 MAR 2004		TREVOR BROWN
??000014		RG12 1ER			30 SEP 2003		
ZF000001	1	RG12 1GH	Mr B Green	Ms C Brown	16 NOV 2000		1 Sony Street Bracknell
??000001	15	RG12 1QA	Mr J Smith	Mrs G Smith	02 SEP 2003		15 Training Street Training

figure 4 Case Enquiry Results

CASE DATABASE

Entry	Road Name	RdNo	Town	Applicant1	Co Iden	Introducer	ReptDate	SysRef	VendTelDy	VendTelEv
15 Jul 2005	Training Str	18	Bracknell	Jones	B 007	Kent Relian	16 Jun 2005	ZZ000030	01245 78965	01365 43251
15 Jul 2005	Training Str	18	Bracknell	Jones	B 007	Kent Relian	16 Jun 2005	ZZ000031	01245 78965	01365 43251
5 Aug 2005	Training Street	25	Bracknell	Thompson	B 001	Abbey National Plc	5 Aug 2005	ZZ000032		
16 Aug 2005			Bracknell		B 007	Kent Relian	31 Oct 2005	ZZ000033		
24 Aug 2005					B 007			ZZ000034		
12 Sep 2005	Training Str	25	Bracknell	Thomas	B 001	Kent Relian	12 Sep 2005	ZZ000036		
13 Sep 2005	Training Str	76	Bracknell	Jones	B 001	Kent Relian	13 Sep 2005	ZZ000037		
14 Sep 2005	Training Str	25	Bracknell	Jackson	B 001	Abbey Natio	14 Sep 2005	ZZ000038		
26 Sep 2005	Ellindon	93	Peterboroug		B 007	(Private CI	10 Jan 2006	ZZ000039		
28 Oct 2005	Training Str	28	Bracknell	Thompson	B 007	Abbey Natio	28 Oct 2005	ZZ000040	01344 45612	
28 Oct 2005	Training Str	28	Bracknell	Thompson	B 007	Abbey Natio	28 Oct 2005	ZZ000041	01344 45612	
28 Oct 2005	Training Str	28	Bracknell	Thompson	B 007	Abbey Natio	28 Oct 2005	ZZ000042	01344 45612	
2 Nov 2005	Training Str	52	Bracknell	Thompson	B 001	Kent Relian	2 Nov 2005	ZZ000043		
2 Nov 2005	Training Str	52	Bracknell	Thompson	B 001	Kent Relian	2 Nov 2005	ZZ000044		
2 Nov 2005	Training Str	52	Bracknell	Thompson	+ 001	Kent Relian	2 Nov 2005	ZZ000045		
3 Nov 2005	Training Str	13	Bracknell	Thompson	B 007	(Private CI	3 Nov 2005	ZZ000046		
8 Nov 2005	TRAINING				B 001	Kent Relian	15 Nov 2005	ZZ000047		
9 Jan 2006	Training Str	1	Training		B 007	Ocean Finan	14 Mar 2006	ZZ000048		
14 Mar 2006	Training Str	90	Bracknell	Thompson		Kent Relian		??000001		
14 Mar 2006	Training Str	1	Training		B 007	Ocean Finan	14 Mar 2006	??000003		
14 Mar 2006	Training Str	1	Training		B 007	Ocean Finan	14 Mar 2006	??000002		

figure 5 Case Database

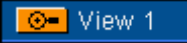
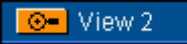
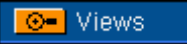
The Database “Tramlines”


When you enter the Case Database, your valuation cases are listed on the screen. This screen display is usually referred to as the Tramlines.


From this Tramlines screen, you can:


Enter a new case record - click  button.

Search for a case - click  button.

Change the Tramlines screen to view different parts of the case records - click the , , or  button;

Access any attachments to the case, such as letters and report forms - click the  box to the left of the case in the Tramlines; (Case Attachments);

Access the reporting menu – click  button;

Display results of previous report run - click  button;

Access the Comparables Report option – click  button;

Exit back to the main menu - click  button.

Use any of the following buttons to move up and down the Tramlines:




Searching for a Case Record

There are two methods of searching for a case in the Tramlines:

Click on the Find button; or

Click on the column heading.

When you click on the  Find button, the top section of the screen will change as shown. Enter the name of the search field and the search criteria, and then click on Find. The Tramlines will display the case records, sorted in order of the search field, with the matching records displayed in the centre of the screen.

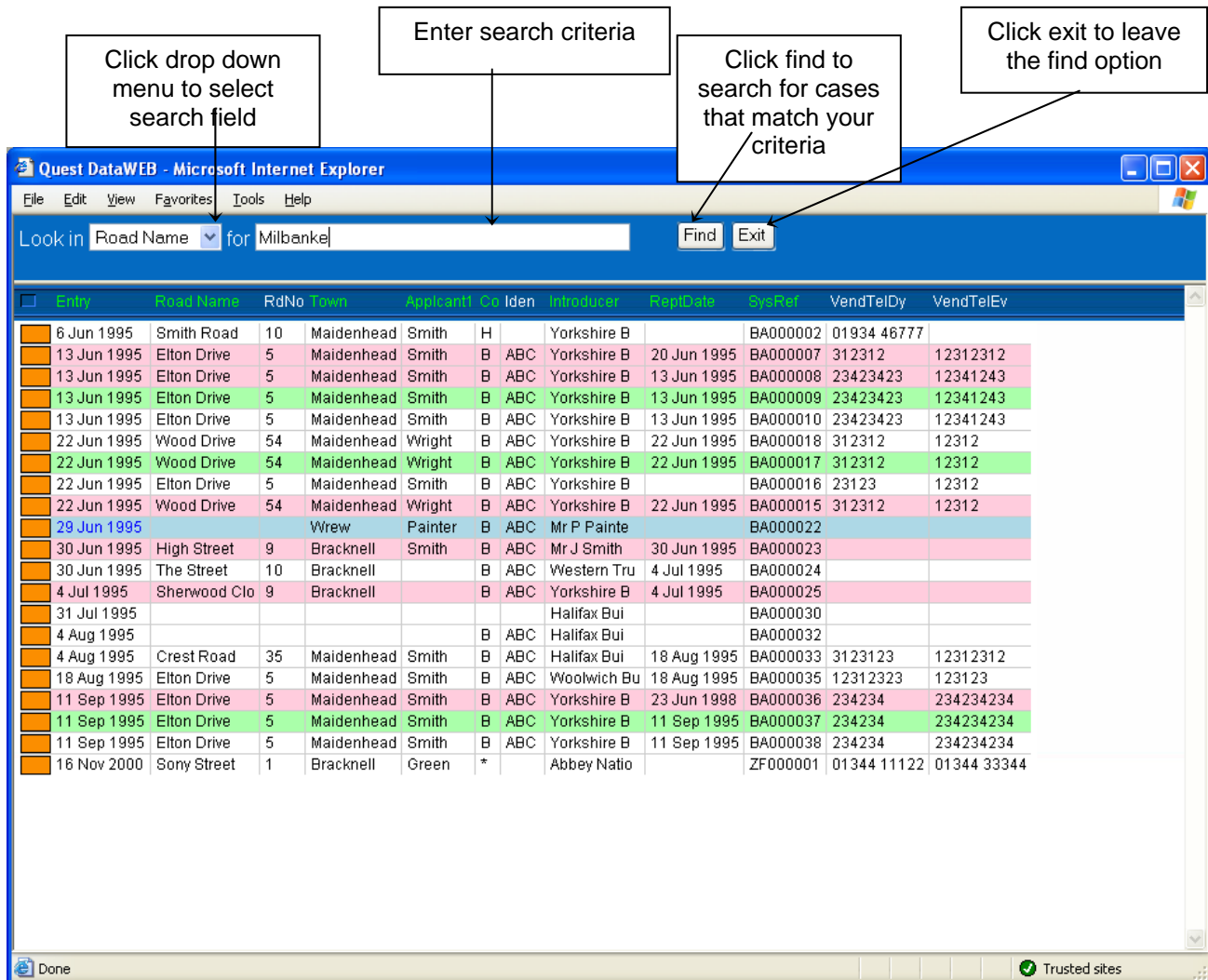


figure 6 Using the Find button to find a record in the Tramlines

For example, to find cases in Milbanke Way, click on the Look in drop down menu and select Road Name, then type Milbanke Way in the For box and click the Find button. The Tramlines will display the cases, sorted into Road Name order, with Milbanke Way in the centre of the screen. If an exact match cannot be found then the nearest match will be displayed.

The second search method works by clicking on the heading of the column containing the criteria by which you wish to search. For example, clicking on the Road Name heading will display a search dialogue box, into which you type the road name.

Click to search by column heading.

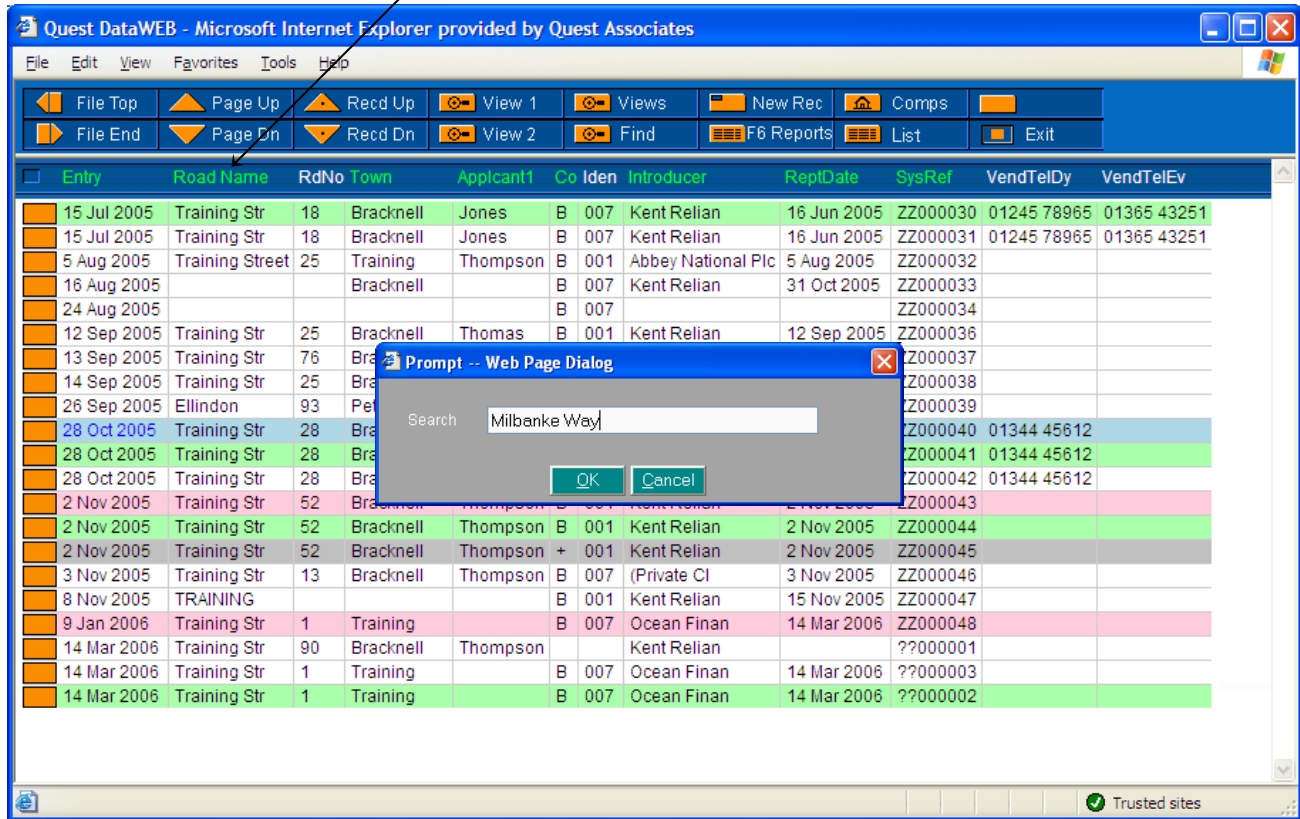


figure 7 Searching by Column Heading

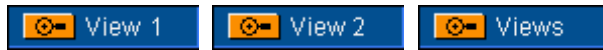
You could search for a road with the name of Milbanke Way by clicking on the Road Name column heading, then entering the name into the search dialogue box.

A quick way to re-sort the tramline display is to click on a column heading then click OK. The display will be re-sorted without needing to enter any search criteria.

IMPORTANT NOTE

YOU CAN ONLY SEARCH ON GREEN COLUMN HEADINGS

Tramline Views



You can change the record fields displayed on the Tramlines by clicking on View 2, and return to the normal fields by clicking on View 1.

You can also specify the fields you wish to view, by clicking on Views and typing in the required field numbers. In the example (Figure 8 Tramline View), the Tramlines are displaying only the Entry date, System Reference, Booking Code and Road Name from each case record.

In order to find the number(s) for the relevant field you wish to view, click on the Fields button

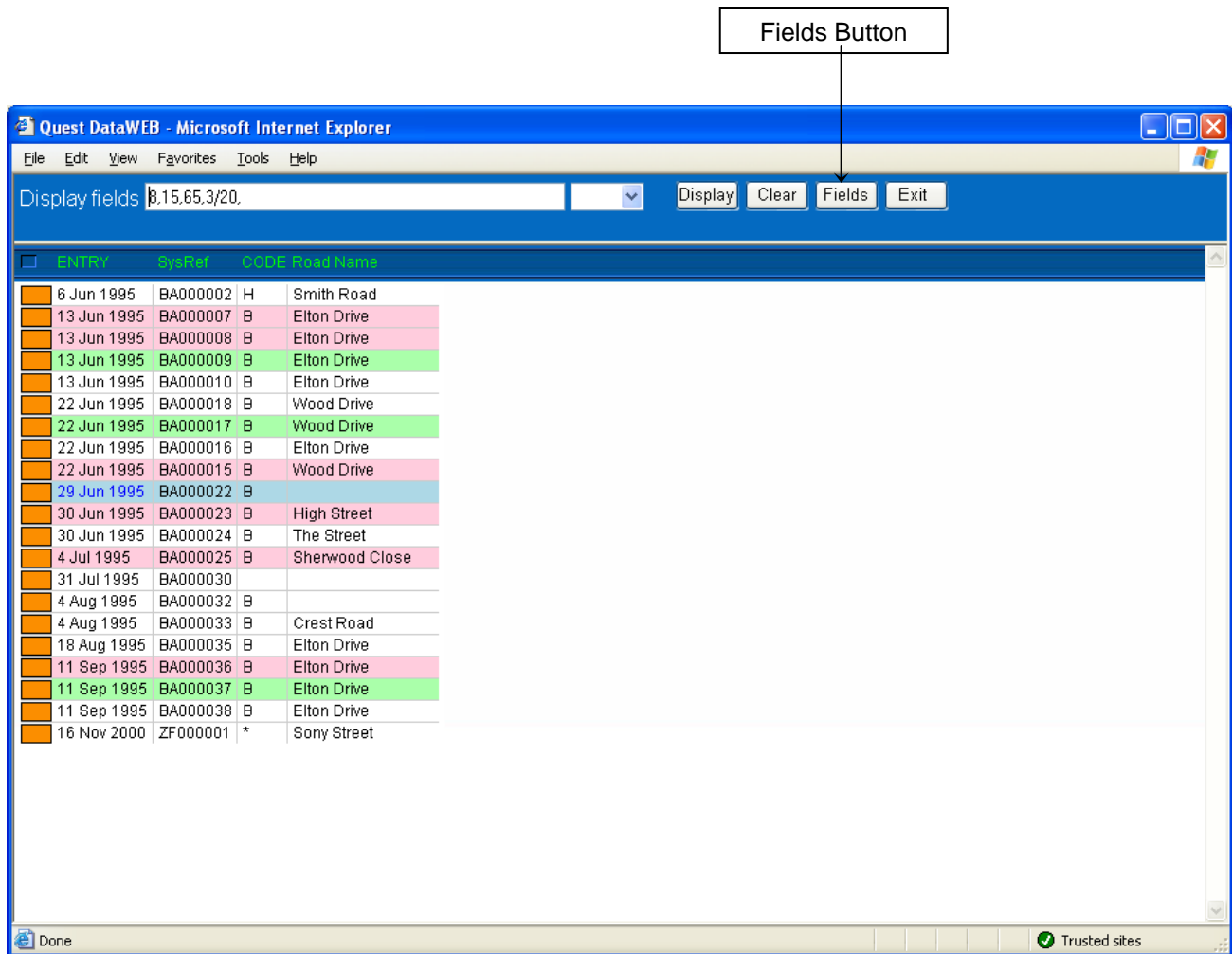


figure 8 Tramline View

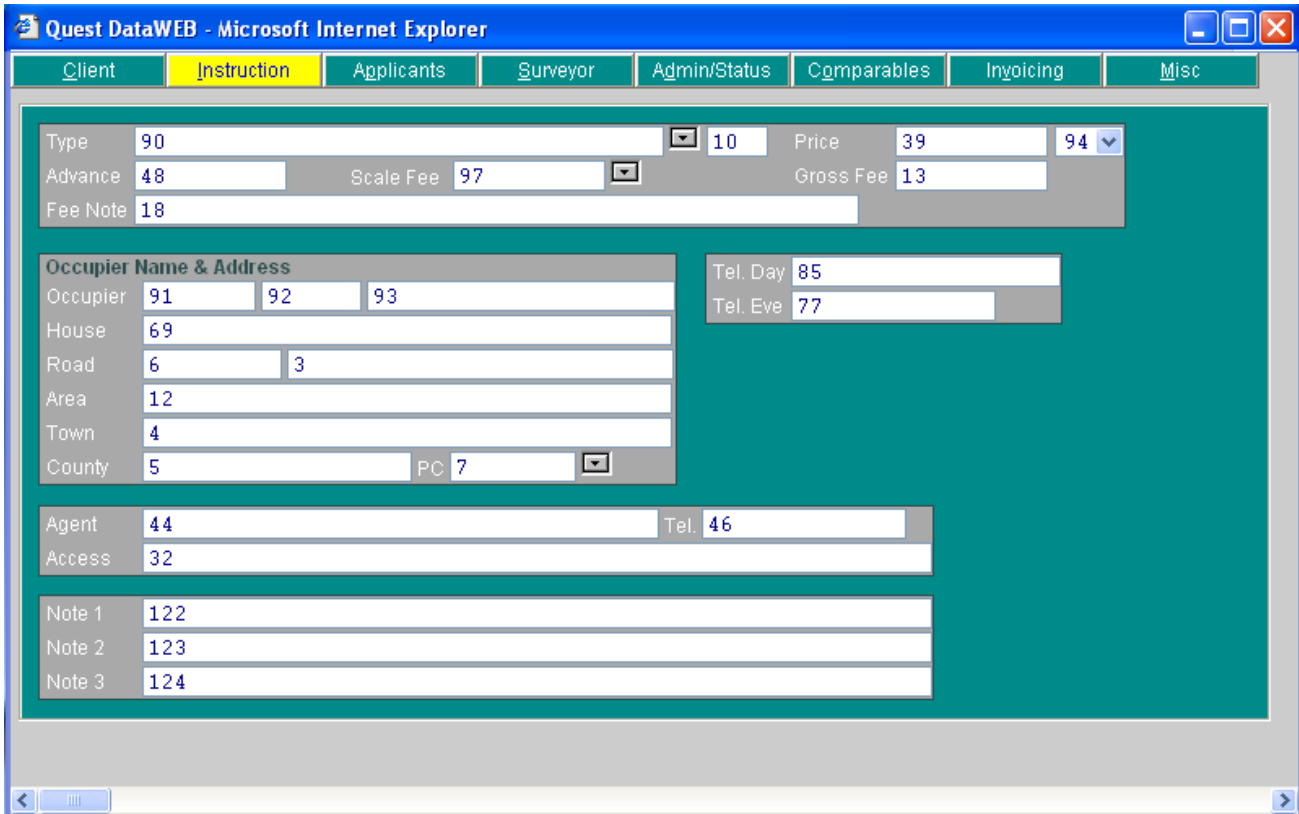
Note that the Tramlines have also been sorted on Entry date, by using the Find option

Field Numbers

There are two ways to find out Field Numbers.

The first one is to click on the Fields button, which will display a Record Card like the one below. You move between pages within the Record Card like normal in order to access the full range of field numbers.

To close this screen after you have found the field number you were looking for click on the X in the top right corner.



The screenshot shows a web browser window titled "Quest DataWEB - Microsoft Internet Explorer". The interface features a navigation bar with tabs: Client, Instruction (highlighted), Applicants, Surveyor, Admin/Status, Comparables, Invoicing, and Misc. Below the navigation bar is a form with several sections:

- Top Section:** Type (90), Price (39), 10, 94, Advance (48), Scale Fee (97), Gross Fee (13), Fee Note (18).
- Occupier Name & Address:** Occupier (91, 92, 93), House (69), Road (6, 3), Area (12), Town (4), County (5), PC (7).
- Telephone:** Tel. Day (85), Tel. Eve (77).
- Agent:** Agent (44), Tel. (46).
- Access:** Access (32).
- Notes:** Note 1 (122), Note 2 (123), Note 3 (124).

figure 9 Field Numbers

The second way is to click in the field in a Record Card for which you want to find the number and then press the F1 key. For example, click in the booking date box and then press F1 and it will display a box like the one below. You can see from this example, the booking date field is number 54.

There is one type of field for which this method will not work. This is a field with a rectangular drop down box as it is a field that brings in information from other places.

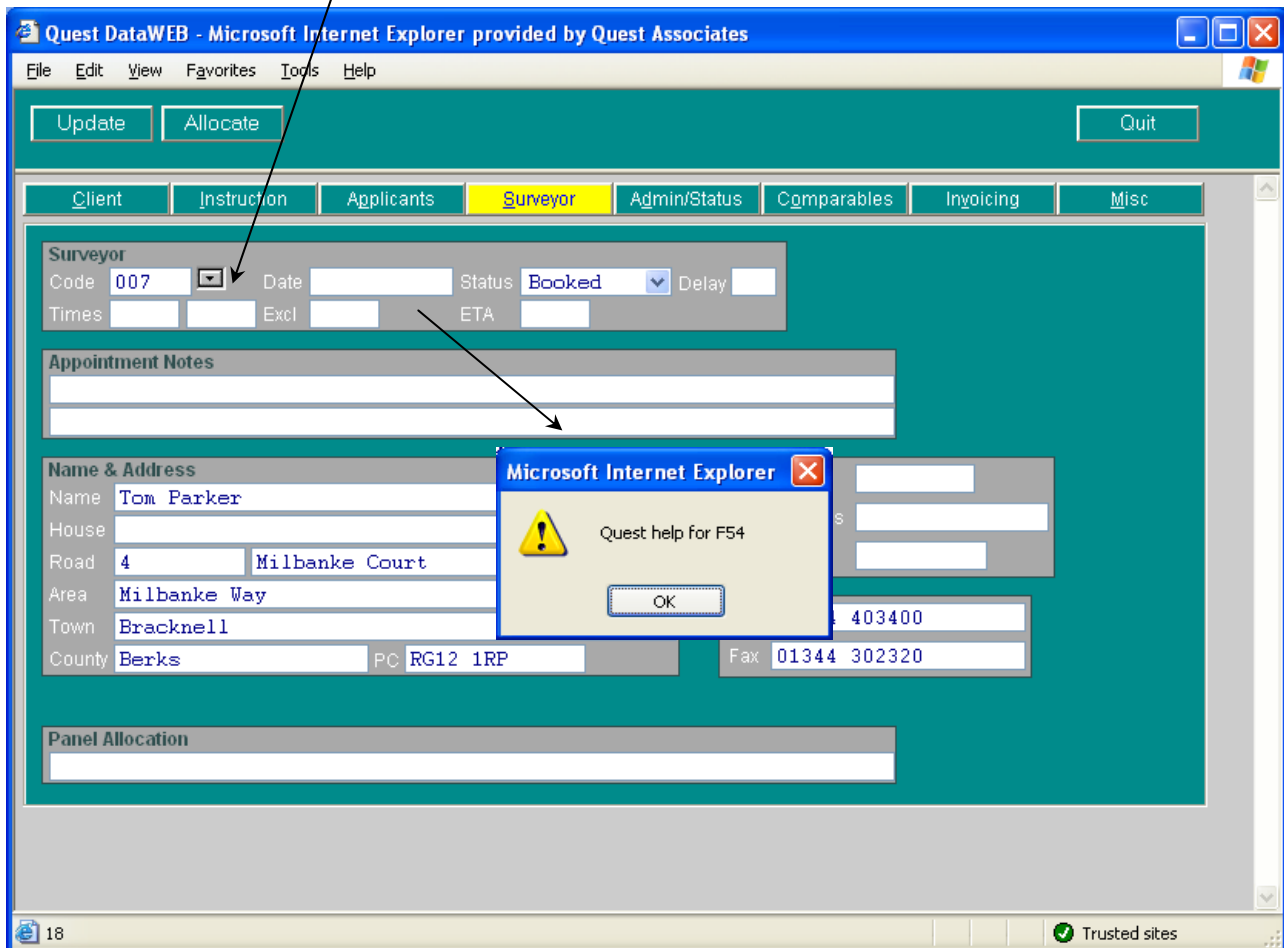


figure 10 Finding Out Field Numbers using the F1 Key

Accessing the 8 Screens in a Case Record

The case record contains 8 pages, which can be accessed directly by clicking on one of the 8 buttons displayed across the top of the screen.

As an alternative to clicking with the mouse, the pages can be accessed through the keyboard by holding down the Alt key and pressing the underlined letter on the button description e.g. Alt S will take you directly to the Surveyor Details screen.

The 8 screens cover the following subjects:

Screen	Contents
<u>C</u> lient	Client details, return address, etc.
<u>I</u> nstruction	Details of the advance, property, access, occupier, etc.
<u>A</u> pplicants	Applicant name and contact information
<u>S</u> urveyor	Access notes, booking details and surveyor identifiers.
<u>A</u> dmin/Status	Administration notes, client requirements and status history of the case
<u>C</u> omparables	Date typed, date inspected, property valuations and comparables data.
<u>I</u> nvoicing	Invoice and payment details, date case completed
<u>M</u> isc	Invoice administration notes and system control information, such as forms tracking.

Table 1 Summary of the 8 Case Record screens

The 3 Control buttons in a Case Record


The control buttons at the top of each page are described in Table 2 - Control Buttons used in a Case record.

Button	Function
Update	Updates and exits the record.
Allocate	Brings up surveyors that cover the postcode on the Instruction page.
Quit	Quits the record, WITHOUT SAVING YOUR CHANGES!

Table 2 Control buttons used in a Case record.

Adding a New Case Record to the Database

The 8 case record screens are illustrated over the following pages

Click on the  button at the top of the Tramlines to create a new case record.

The first part of the process is to select the particular lender by clicking on the drop down box.

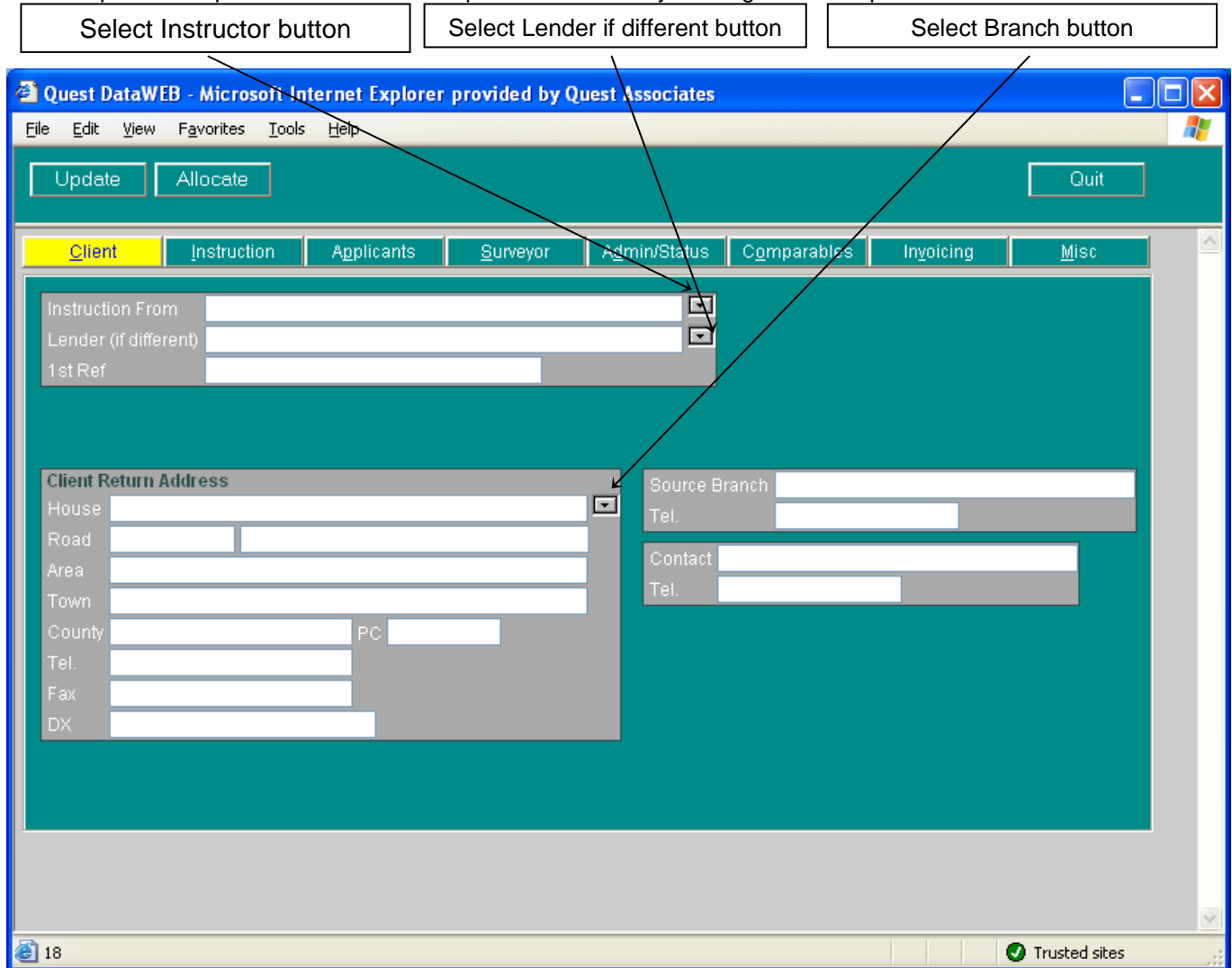


figure 11 Client Page



By selecting the Instruction From button this will produce a drop down box where you can select different lenders. By selecting the Lender if different option this will also produce the same list to select from.

After you have filled in all the relevant details regarding who the lender is, the next stage is to fill in the information about the property that is going to be inspected and what type of inspection that needs to be carried out.

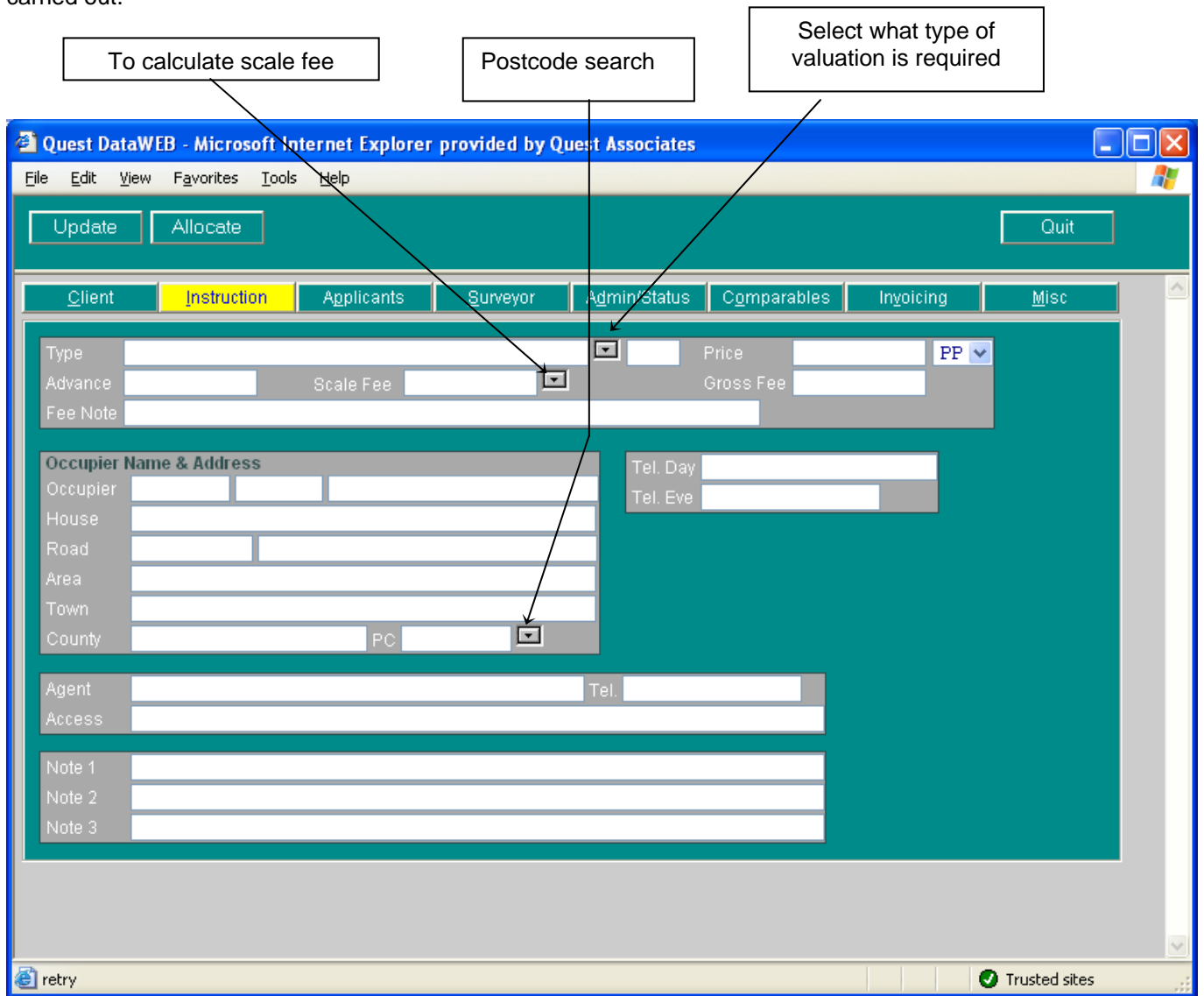
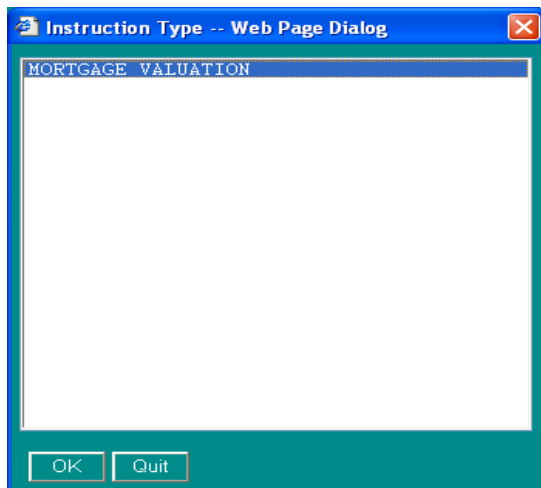


figure 13 Case Record – Instruction Page



By clicking on the Instruction Type box, this will produce a list of what types of valuations are available.

After selecting the type of instruction, next stage is to fill in the Purchase Price (PP). From this you can calculate the scale fee. This will vary depending on the PP of the property and what type of valuation is required. If you find that the scale fee is different from the gross fee, a reason must be entered in the Fee Note

figure 14 Instruction Type

You can also run a post code search of properties that are in the same area so that you can compare if need be. The results of such a search are displayed as below.

SysRef	Entry	S	Address	Applicant	Surve
SP000007	20 SEP	B	69 Woodcote Close RG12	white	21 S
SP000013	20 SEP	B	1 Anywhere Street RG12	Brown	20 S
??000006	08 SEP	B	1 Training Street RG12	Bloggs	
ZY000026	04 NOV	B	RG12		007
ZY000027	04 NOV	B	RG12		007
ZY000030	07 NOV	B	RG12		14 N
ZY000036	10 DEC	B	1 Training 3 RG12	Bloggs	10 D
ZY000037	10 DEC	B	1 Training 3 RG12	Bloggs	10 D
ZY000038	10 DEC	B	1 Training 3 RG12	Bloggs	10 D
ZY000041	10 DEC	B	1 Training 3 RG12	Bloggs	10 D
ZY000042	10 DEC	B	1 Training 3 RG12	Bloggs	10 D
ZY000047	07 JAN	B	1 Training Street RG12	Bloggs	07 J.
ZY000048	07 JAN	B	1 Training Street RG12	Bloggs	07 J.
ZY000049	07 JAN	B	1 Training Street RG12	Bloggs	07 J.
ZY000081	04 MAR	B	TREVOR BROWN RG12		001

figure 15 Post Code Search Results

This page is where the applicants details are filled in.

Quest DataWEB - Microsoft Internet Explorer provided by Quest Associates

File Edit View Favorites Tools Help

Update Allocate Quit

Client Instruction Applicants Surveyor Admin/Status Comparables Invoicing Misc

Names
Title Mr Init T Surname Parker
Title Init Surname

Address
House Quest House
Road 4 Milbanke Court
Area Milbanke Way
Town Bracknell
County Berskhire PC RG12 1RP
Tel. Day 01344 403400
Tel. Eve EMOK

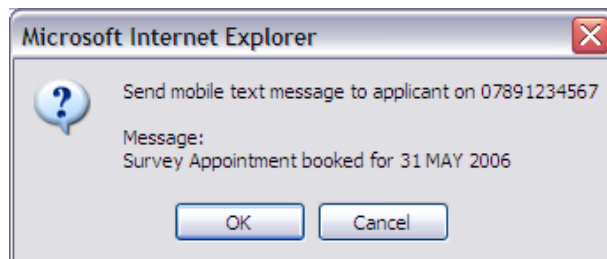
Internet Publishing Password
Applicant

Done Trusted sites

figure 16 Case Record – Applicants Details Page

Homebuyers / Building Survey / Home Condition Report publishing password

The system will send a text message to the applicant if a mobile phone number is filled within the Tel.Day or Tel.Eve field. This function will only apply to Homebuyers (HB), Building Survey (SS) Scheme 2 (S2) and Home Condition Report (HC).



You can stop the publishing from happening by clicking on the Internet Publishing password button. This will put N/A in the box which stops any further information including the signed off report from being published.

This page is where all the booking information is entered for the particular job and also for which surveyor the job has been booked. There are two ways to book a job. You can either click on the Allocate button at any time whilst you are in the record or you can click on the drop down box within the Surveyor page. Both methods will result in the same process happening.

This will bring up a list of surveyors whose postcodes match the property. You can restrict which surveyor covers which postcode range. This is set up in the panel database (see page 50)

Click on drop down arrow or allocate button for booking to a surveyor

Click on drop down arrow to change the status of the case

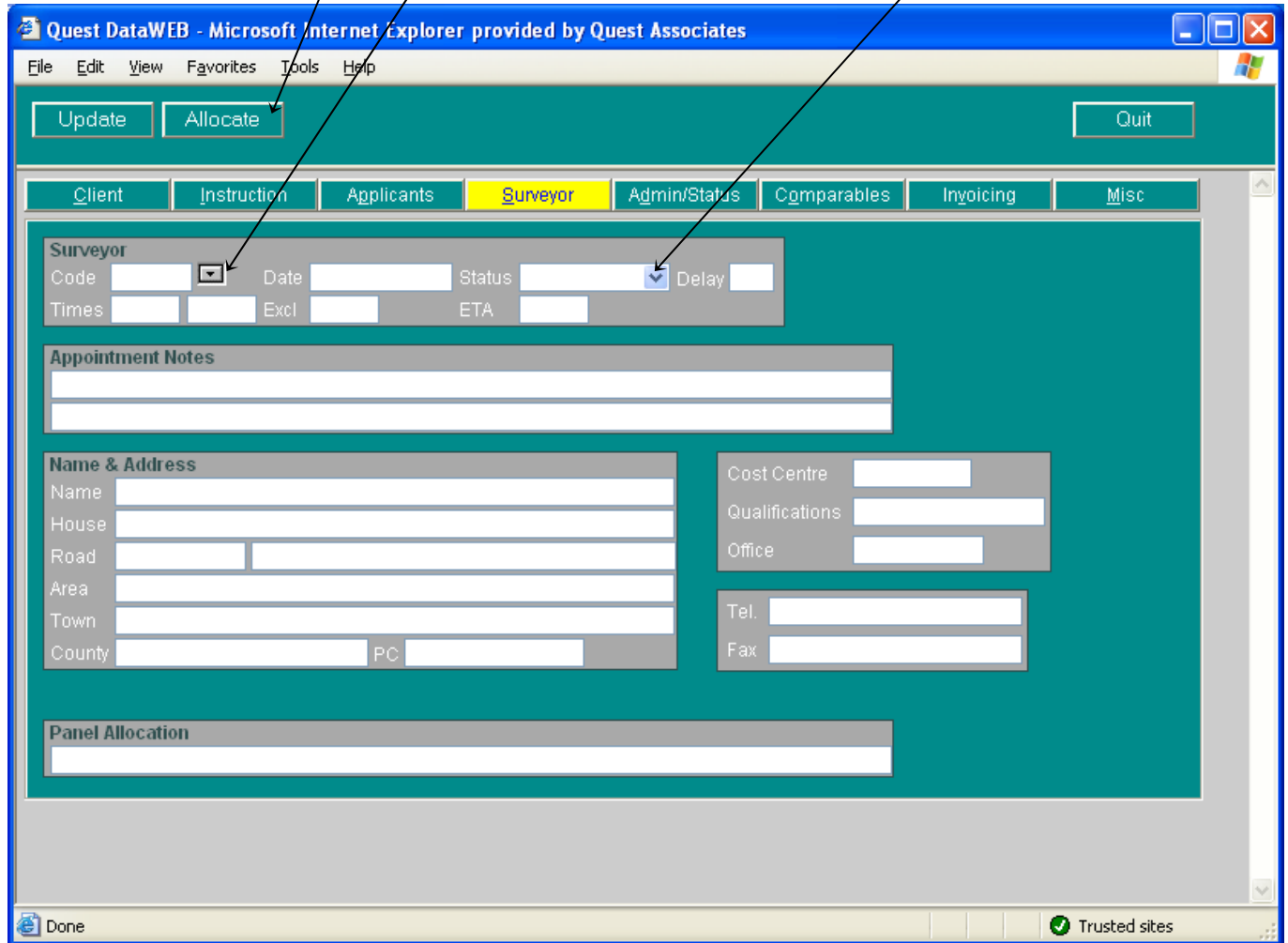
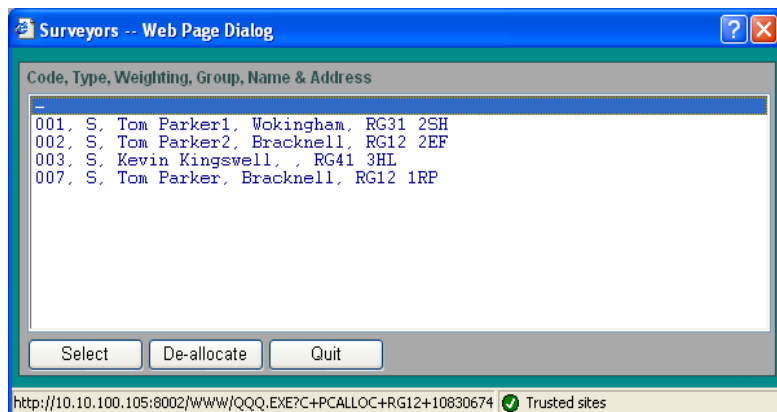


figure 17 Case Record – Surveyor Details Page



After selecting the relevant surveyor, the rest of the details are pulled in automatically.

The Admin/Status page is an up-to-date record of the progress of the case. For example, as you can see below the case has been booked for the 27 APRIL 2004. If at any stage the status of the job changes, again a note of that is recorded in this section.

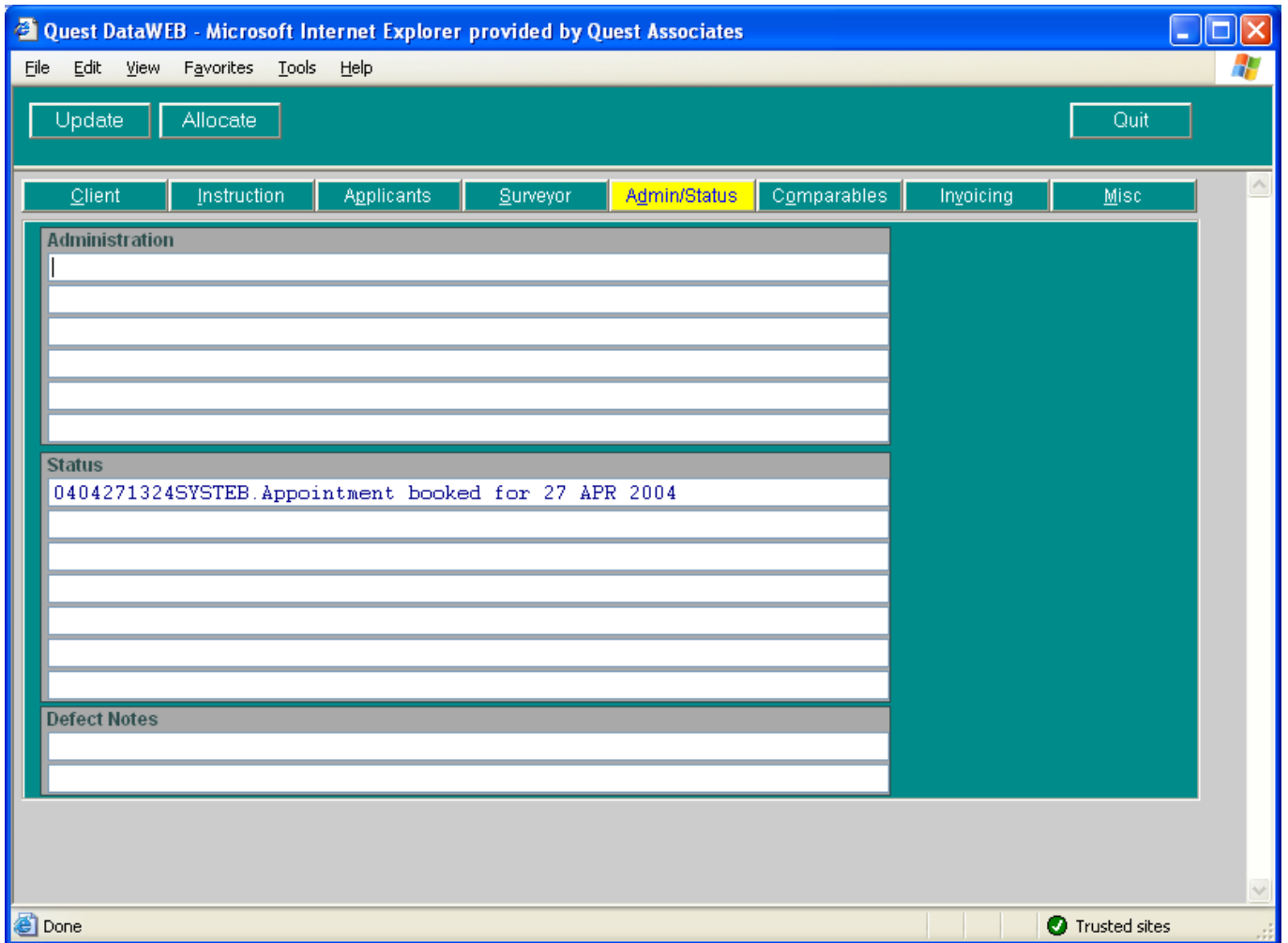


figure 18 Case Record – Admin/Status Page

The Comparables page is where information is kept regarding the property after it has been surveyed. This can be very useful for future reference for properties within the same area.

Quest DataWEB - Microsoft Internet Explorer provided by Quest Associates

File Edit View Favorites Tools Help

Update Allocate Quit

Client Instruction Applicants Surveyor Admin/Status **Comparables** Invoicing Misc

Typed by Report Date Report Time

Prop Type

Tenure Unexp Rent

Year Built Cond Living Beds Baths Conservatory SAP

Floor Area CHeat Cloaks Floors Utility Garage

Val Present Val after Work Inspection Date

Price PSM Building Insur Sale (Y/N)

Notes

Done Trusted sites

figure 19 Case Record – Comparables Page

The Invoice amount is automatically pulled in from the scale fee that has already been calculated. The system will automatically calculate the VAT for you. The invoice address will default to whatever is filled in on the client page. If the invoice address is different, the correct section needs to be completed on the invoice page before the invoice is raised. After the invoice has been completed, the invoice number will be raised when the update button is pressed.

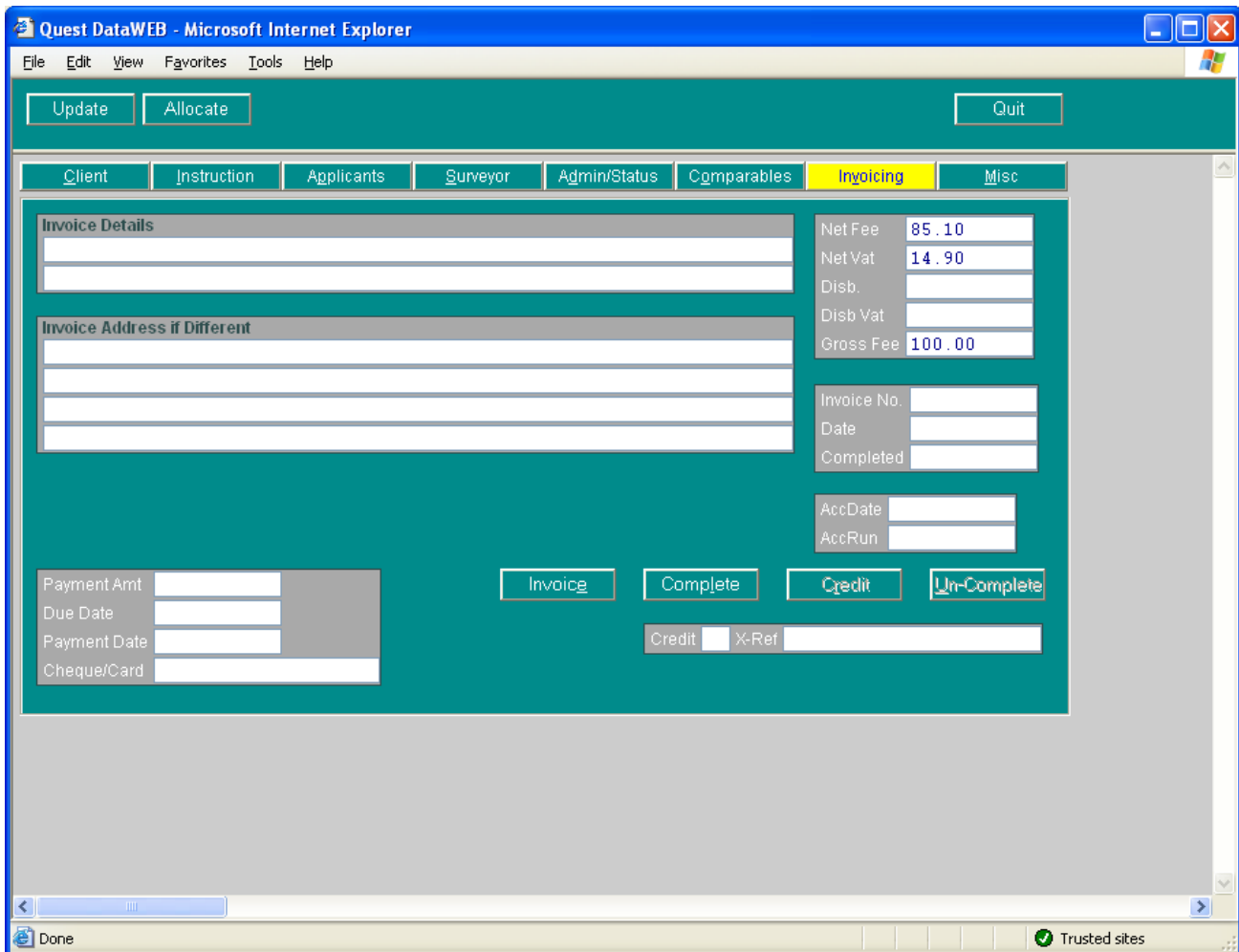


figure 20 Case Record – Invoicing Page

Invoice – Allocate an invoice number.

Complete - Complete a case without invoicing the job.

Credit - Credit a case that has been invoiced

Un-Complete - Remove Completed Date from cases that have NOT been invoiced. Supervisors only have rights to do this.

INVOICING

Within the invoicing page simply click on the invoice button, which will allocate and produce an invoice when you update the case.

To auto calculate, press F5 over the following fields

Net Vat

Disb Vat

Gross Fee

Crediting a Case

After the case has been invoiced, there is a facility to credit the case.

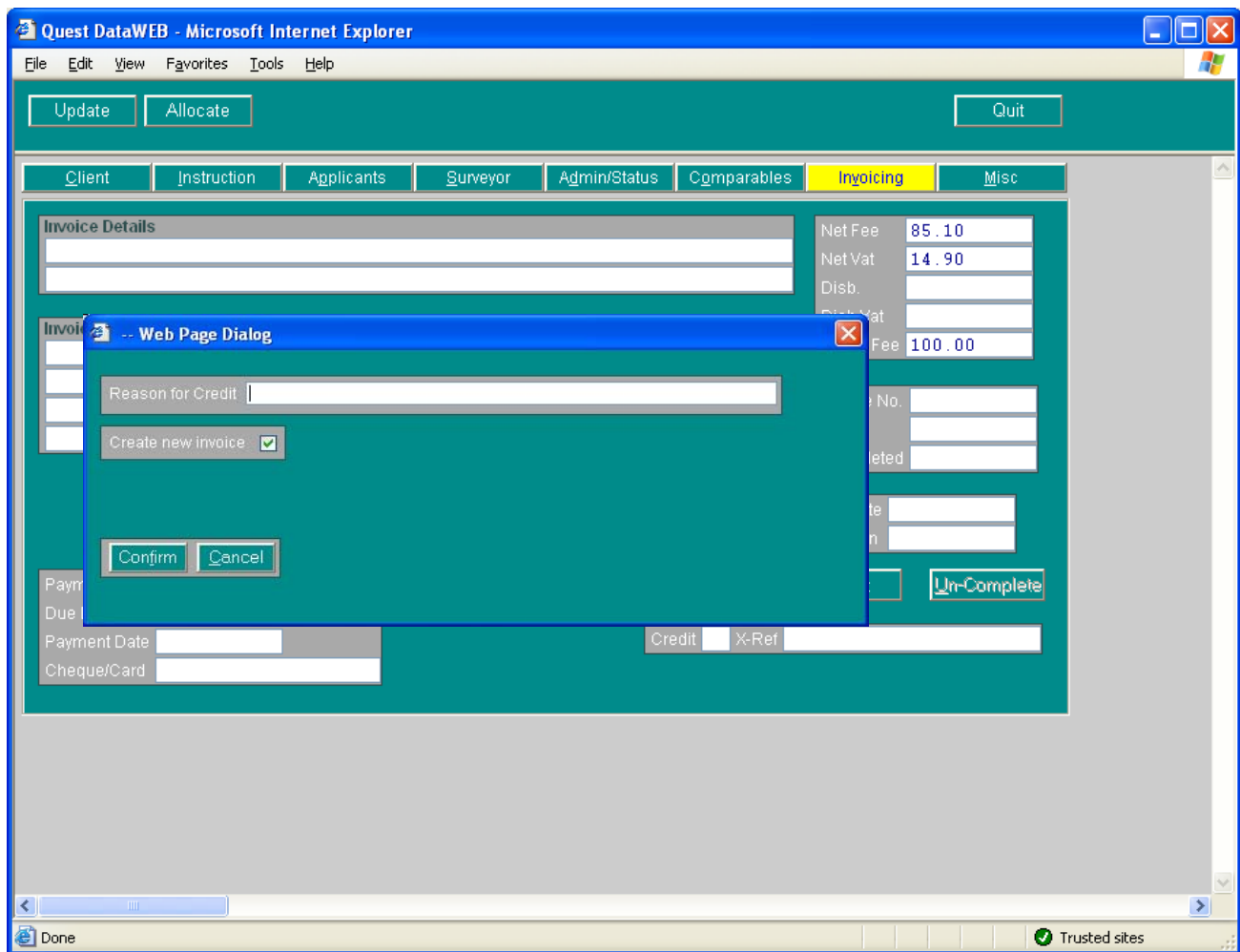


figure 21 Crediting Case

By clicking on the Credit button, a prompt box will appear asking for a reason. It will also give you the option to create a new invoice.

IMPORTANT NOTE

If you remove the tick from CREATE NEW INVOICE it will not create a re-invoiced case

After the credit note and re-invoice have been created you will notice two new records on your system, which are colour coded:

PINK - Original case

GREEN - Credit note

CLEAR - New re-invoiced case

The Miscellaneous page goes into more details regarding the case. On this page it will list any client requirements that have been requested by the lender. The rest of the information is for administrative use only. Please note that no changes can be made on this page.

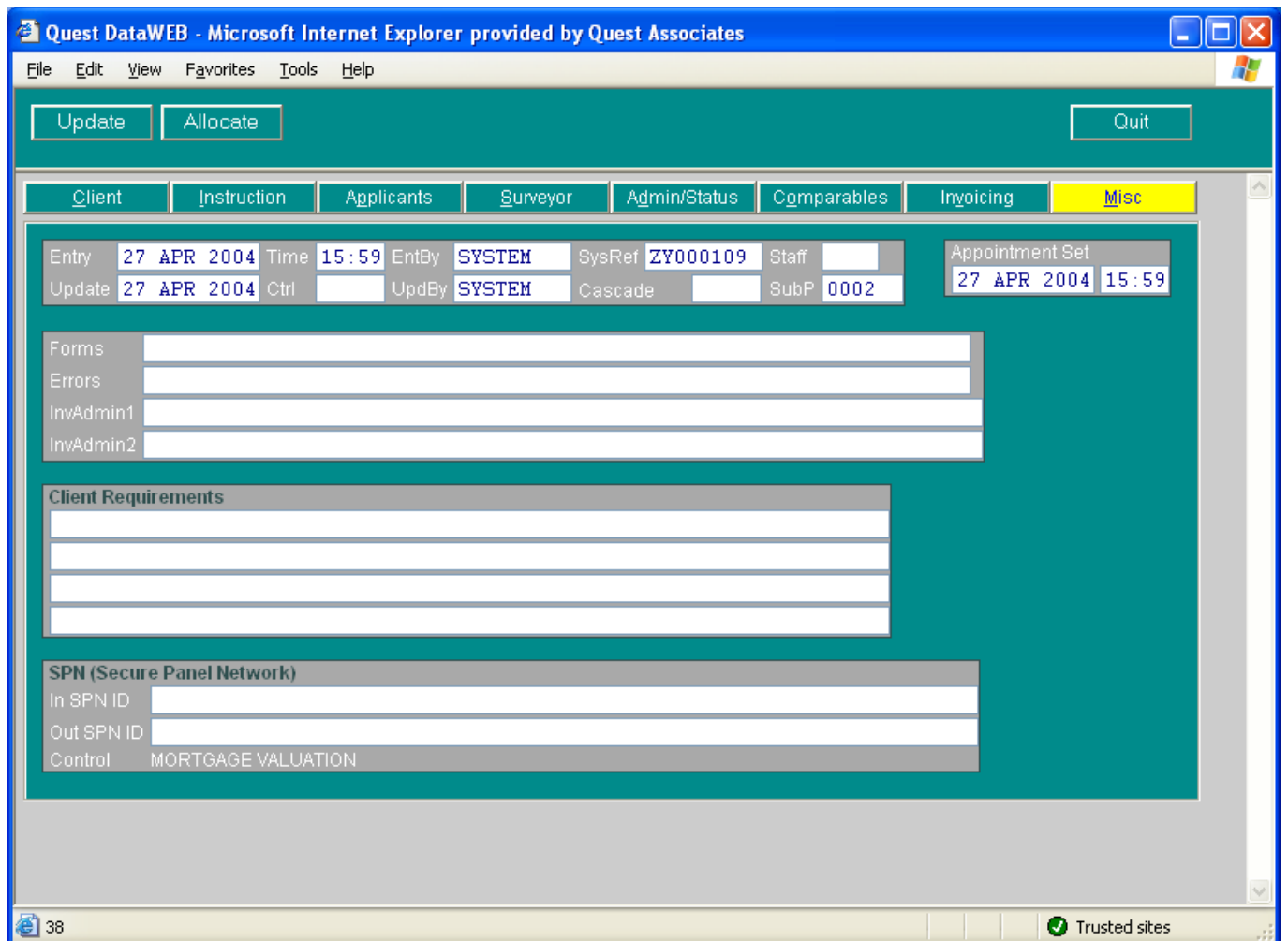


figure 22 Case Record – Miscellaneous Page

UPDATING AN EXISTING CASE RECORD

Cases are accessed from the Tramlines by clicking on the required case.

If the case is not displayed on the Tramlines use the  option

You can move around the screens with either the Tab or Return keys. You can move between screens by use of the Page Up and Page Down keys, or by clicking on the screen name displayed near the top of each screen. The control buttons, at the top of the screen, are used as follows:

The Update button saves your changes and exits the case record;

The Allocate button brings up surveyors that cover the postcode on the Instruction page.

The Quit button exits the case record WITHOUT SAVING YOUR CHANGES;

CASE ATTACHMENTS

All the information relating to a case is entered into the case record on the database, but you will also have documents that relate to the case, such as valuation reports and letters. These items are referred to as Case Attachments.


Select the case record on the Tramlines and click on the square button  on the left of the case to display the Attachments screen.



figure 23 Case Attachments Screen

The example screen (Figure 23 Case Attachments screen) shows that there are two reports. One report is at a status of “Created”. This shows that the form has been created but not completed. “Archived” means the form has not been accessed for 30 days.

Clicking on the Report icon will display the report.

Clicking on the Printer icon will print the report.

ATTACHING PHOTOS

Technical Requirements

The appropriate camera drivers must have been installed on the machine that is going to have a camera attached – and these drivers must provide drive letter access (using the Mass Storage Interface) to the camera's memory card via a USB or other appropriate connection.

The digital camera must have been set up to preferred settings, including size and quality settings for images. NB Image size should ideally be set to 640x480; there is no benefit to using a higher size as the Quest system uses a smaller size in order to keep the data storage requirements to a minimum.

Overview

Photos are taken of one or more properties by a surveyor on a digital camera. The surveyor then returns to the office where these photos are transferred to the computer. These photos are then associated with the correct case in an "image library" – this appears as an entry on the case attachment screen with the extension \$E1.

When a form which is photo enabled is signed off, the image library file (at that point in time) is incorporated into the signed off form (note: images do not have to be included with a photo enabled form – so if there is no image library file then obviously no images are incorporated into the signed off form – this form cannot be modified at a later date to include images as it is signed off and cannot be altered).

Whenever a signed off form is viewed which has photos incorporated within it, these photos are shown as thumbnails at the top of the form, and clicking on the thumbnail opens a window with the full size image. This means that wherever a signed off form which has photos incorporated into is sent it, these photos will be automatically displayed when the form is viewed – this assumes that the recipient system is photo aware which does require a small DataWeb update.

Downloading Photos

1. Connect the digital camera to the computer,
2. On the main page of the Quest DataWeb system there is an option called "Download Photographs", click on this to automatically download all photos that are on the digital camera to the Quest system. If this works, you will see a progress window appear which will show the following sequence of messages:

Firstly it will ask you to select the digital Camera drive, highlight the drive letter then press ok.

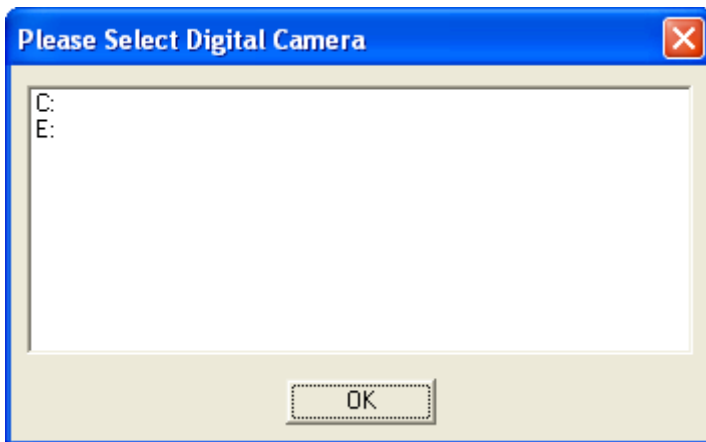


figure 24 Selecting Digital Camera Drive

3. Downloading images from drive 'E', please wait
4. This copies all of the original source images from the digital camera to the Quest system. It does NOT delete the images from the camera, this should be done manually after images have been successfully attached to cases.

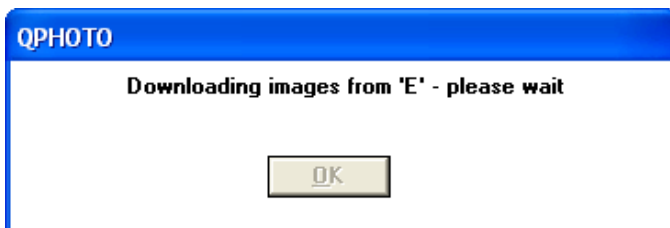


figure 25 Downloading Images

6. Photographs downloaded

This is purely a confirmation that the required number of images have been successfully downloaded and processed and is ready for attaching to case records.



figure 26 Download Confirmation

NB: If the camera is either not connected or has now presented itself as a different drive letter than expected then a message box will appear with the message "Removable drive has not been found. Is it plugged-in and has it been assigned the drive letter."

Maintaining a Case Image Library

- 1) Locate the case that you wish to add the photos to and go to the Attachments screen

- 2) Click on the “Photos” button at the top of the screen (next to the Exit button) in order to invoke the QPhoto application – this may take a few moments to appear and you will also notice that the Quest page changes from the Attachments screen back to the Tramlines screen.

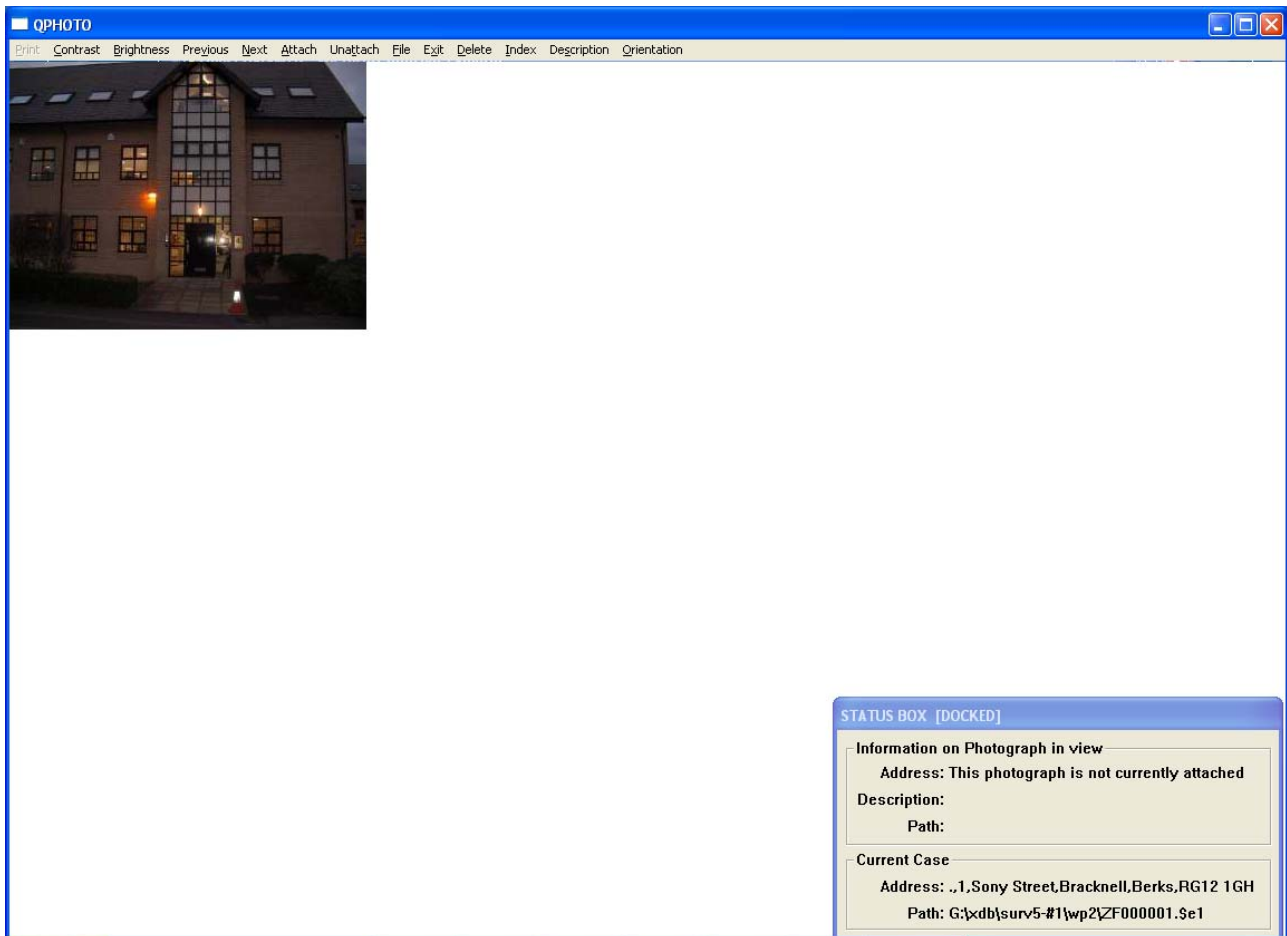


figure 27 Viewing Downloaded Photos

Please note that the images that are displayed within the QPhoto application comprise all the photos that have not yet been assigned to a case and, if photographs have been provisionally assigned to the case but not filed, then these are shown as well. It is the act of filing images that physically adds them to the image library.

3) The QPhoto application display is split up into 3 parts:

a) A menu bar containing the options:

- i) **Print** - prints the current photograph to the default Windows printer
- ii) **Contrast** - allows the alteration of the photograph's brightness range to help enhance the colours by expanding the range – this means that pixel values (which have a range of 0 to 255) are scaled to fit the range specified and then this range is expanded back out to the full range. What this does is darken or lighten an image but keeps the full range of the possible pixel values used, thus enhancing the colour difference that can help bring out visual detail.

A dialog box appears requiring the entry of minimum and maximum values. Using values of 0 and 255 keeps the image the same. To make the image darker you could use values of 128 and 255 or 64 and 255 or to make the image lighter you could use values of 0 and 128 or 0 and 192. Alternatively, you could make the image richer by using the values 64 and 192. Depending on the image, you may need to vary the values and experimentation may be required.

Performing this action again re-applies the contrast to the already contrasted image; it does not apply the new contrast settings to the original image. To undo your change just click the next/previous menu entry and you are prompted with "Do you want to save changes?" Just click "No" if you want to undo your test contrast.

- iii) **Brightness** - similar to contrast but applies a uniform amount of lightening which makes the image brighter but does not enhance the difference between colours so that additional detail is not revealed.

A dialog box appears requiring the entry of the required brightness value. Values between 0 and 255 are allowed, although the normal range of values is likely to be between 10 and 100 (for dark images) as a value of 255 leaves you with a completely white image.

It is recommended that you start with a low value. If this is not enough, you can apply the same low value again to lighten the image even more. If you try out a value and do not like the result then click the next/previous entry menu entry and you are prompted with "Do you want to save changes?". Just click "No" if you want to undo your test brightness.

- iv) **Previous** - changes the image view to the previous image available. If you are already at the first image you are informed of this and the current image remains. If you have made changes to the brightness, contrast or orientation of the image you will be asked "Do you want to save changes?". Click the "Yes" or "No" button as appropriate.
- v) **Next** - changes the image view to the next image available. If you are already at the last image you are informed of this and the current image remains. If you have made changes to the brightness, contrast or orientation of the image you will be asked "Do you want to save changes?", click the "Yes" or "No" button as appropriate.
- vi) **Attach** - If the current photograph is already attached to the case then you are informed of this and nothing happens.

If the current photograph is not attached to the case a dialog appears asking for the Photograph Number, also known as the index position, against which the photograph should be stored within the image library.

Some forms may require that certain pictures of a property be stored in a particular order in the image library (e.g. position1 = front view, 2 = side view, 3 = rear view etc). If this is a requirement you should be informed of this. If you do not know then you can assume that this is not a requirement and you can accept the default value suggested.

If you put an image into the wrong position you can change this using the Index menu option.

After Okaying the Photograph Number dialog, another dialog appears which requires you to enter a description for the photograph (this will also appear on the form beneath the image thumbnail after e-signing). Enter the appropriate description and click the OK button.

You can change this description later by using the Description menu option.

You will notice that the status box is updated to show that the photograph has been attached to the case and what its index position and description are.

- vii) **Unattach** - If the current photograph is not currently attached to the case then you are informed of this and nothing happens.

If the current photograph is attached to the case, then this unattaches it and puts it back in the pool of images that are available for attaching to cases. This is useful if an image has been accidentally attached to the wrong case.

- viii) **File** - If the current photograph is not currently attached to the case then you are informed of this and nothing happens.

If the current photograph has been attached to the case then the image library file is updated.

Note: If you attach several photographs in one go it is easier to click Exit and "File the changes" rather than file each individual photograph as you add it.

- ix) **Exit** - Quits the QPhoto application, if you have attached images to the image library or made changes you are asked whether you "Want to file the changes?". If you choose "No" then the existing changes are remembered for the next time, i.e. any images are provisionally attached to the case but the image library has not yet been created.

If you choose "Yes" then the image library is updated

- x) **Delete** - Will delete the current photograph (after a confirmation dialog) from the Quest system, if the image is currently within the image library it is removed from it. Please note that once you delete an image you cannot recover it. This is useful if you take more photographs of a property than you actually end up using or require.

- xi) **Index** - If the current photograph is not currently attached to the case then you are informed of this and nothing happens.

If the current photograph is attached to the case then the Photograph Number dialog box appears with the existing index position shown which you can change.

- xii) **Description** - If the current photograph is not currently attached to the case then you are informed of this and nothing happens.

If the current photograph is attached to the case then the Description dialog box appears with the existing description in which you can change.

- xiii) **Orientation** - rotates the image anti-clockwise by 90 degrees, if you do this four times you will get back to the original orientation.

- (a) The photograph view area that shows the current photograph with the results of any contrast, brightness or orientation changes that have been made.

- (b) The status box that gives information on the current photograph including whether it has been attached to the case. It also shows the description that has been added (if any).

Attaching Downloaded Photos

After searching through the Qphoto Library and decided what photos to attach, simply click on the Attach option which will prompt you to enter in a photograph number.

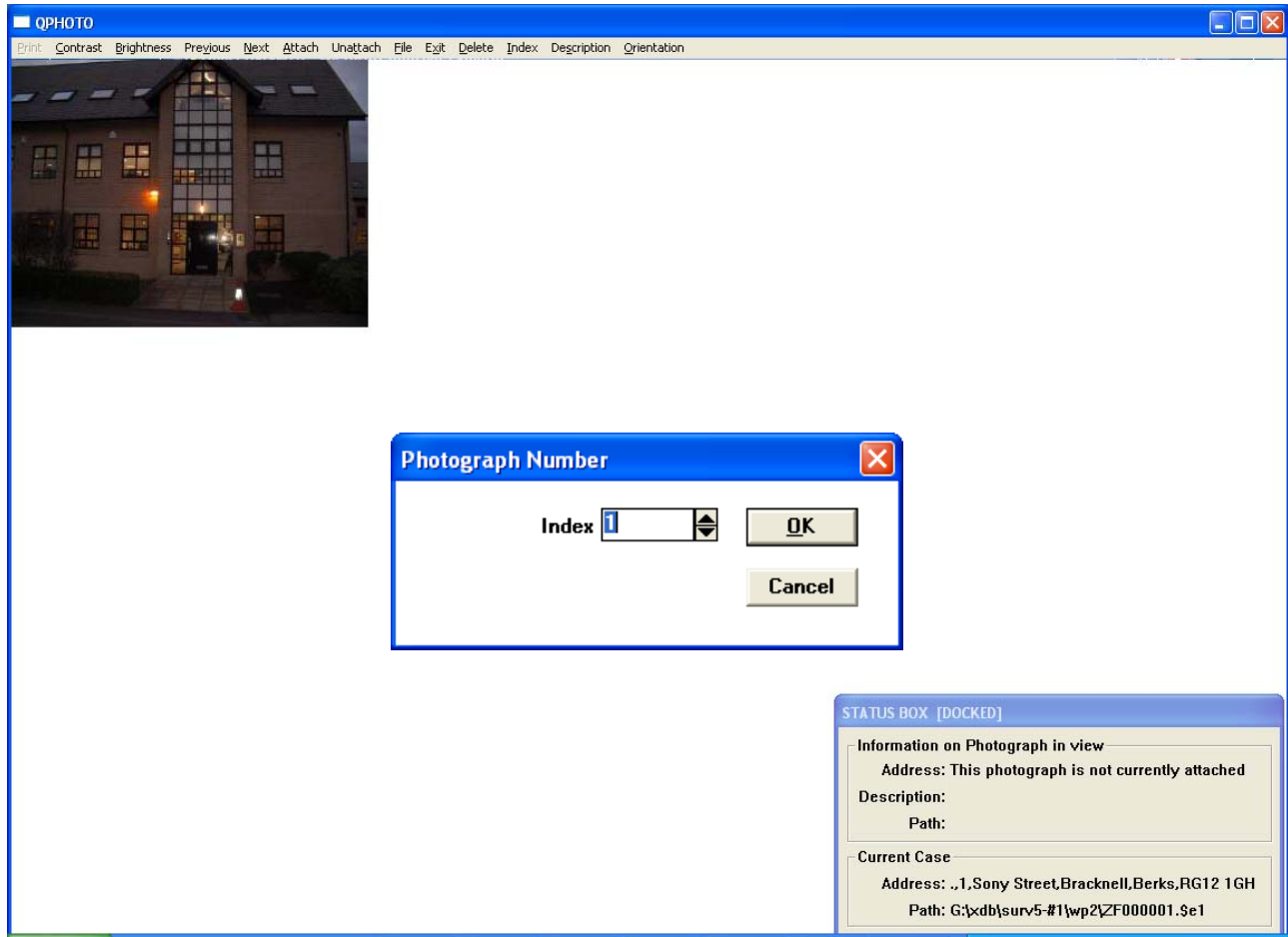
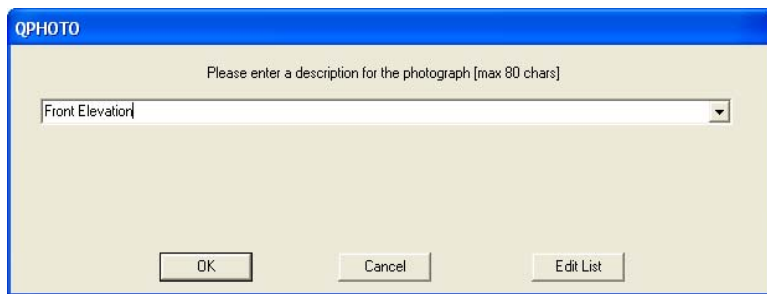


figure 28 Numbering Photos

After specifying the number for that photo it will then ask you for a description of the photo.



Description list can be edited at any point through out the attaching process.

figure 29 Description of Photo

Once successfully attached the status within the status box gets filled in stating the path name of where the file has been stored and the description will be filled in.

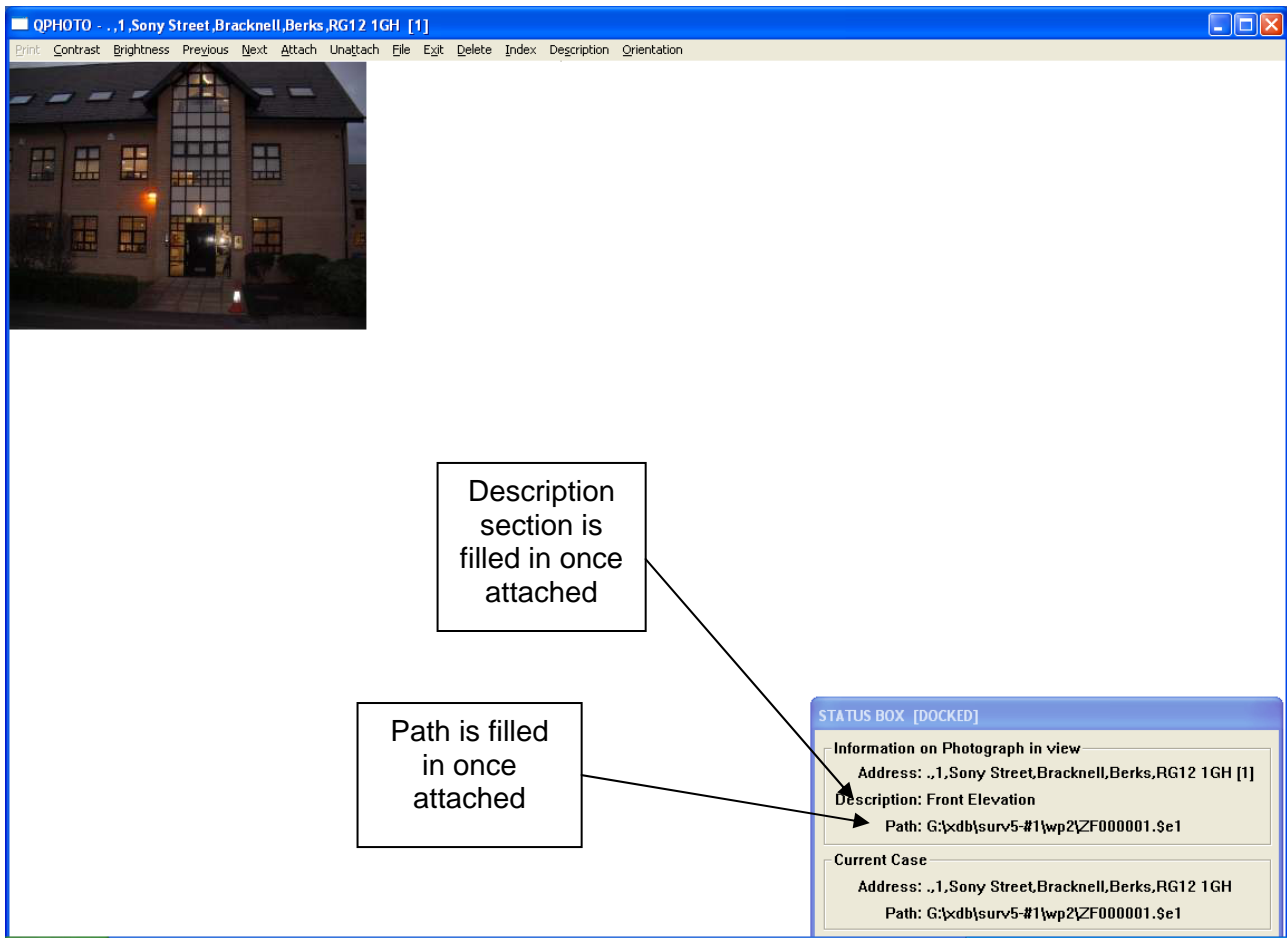


figure 30 Attached Photo

Viewing a Case Image Library

- 1) Locate the case for which you wish to view the image library and go to the attachments screen
- 2) When an image library has been created, it appears on the Attachments screen with a Type button labelled "Photos", a file name of "\$E1" and a description of "Photo Library".

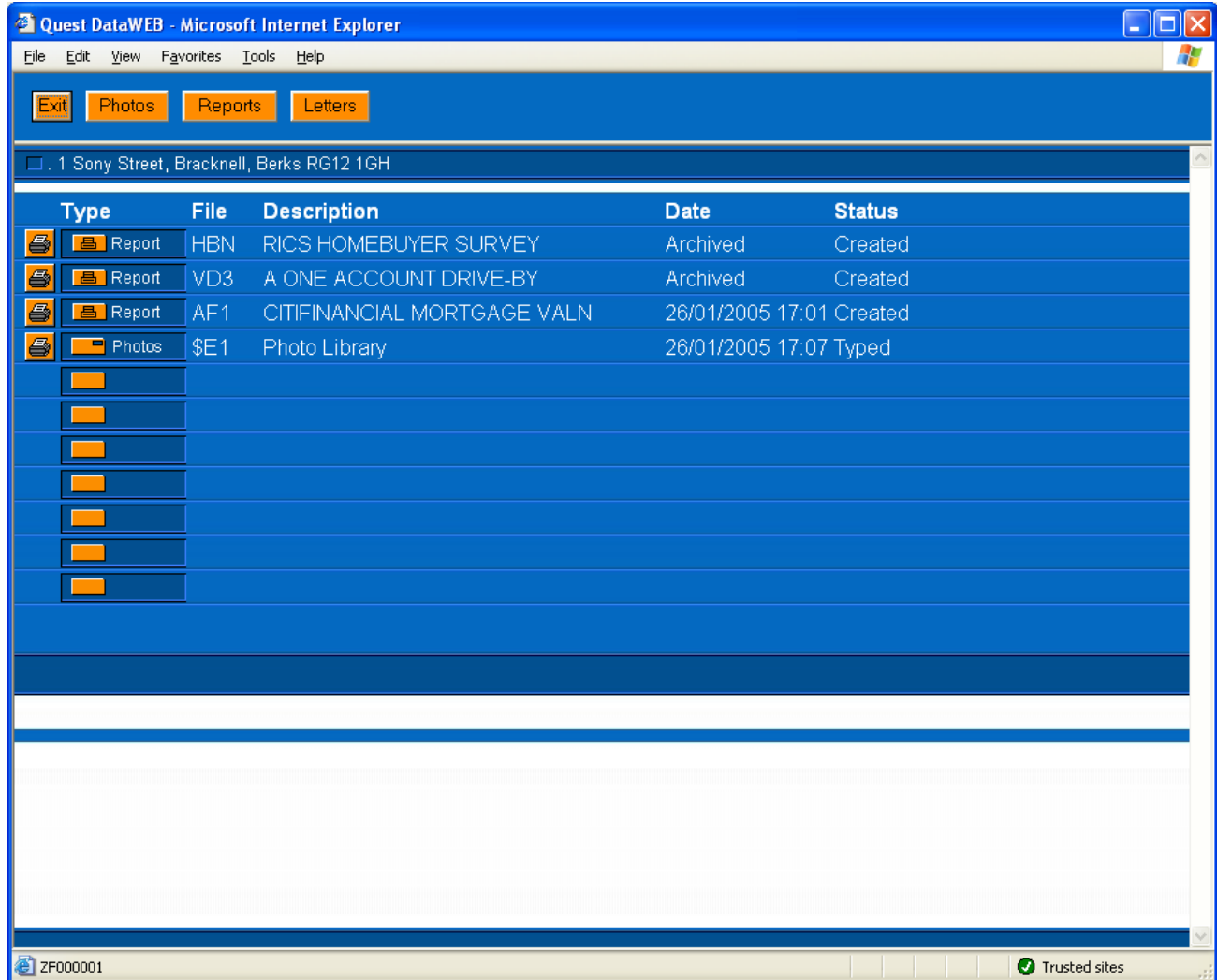


figure 31 Attached Image Library Screen

- 3) Click on the "Photos" button to open up the image library, in view mode, in order to invoke the QPhoto application – this may take a few moments to appear and you will also notice that the Quest page changes from the Attachments screen back to the Tramlines screen.

Please note that the images that are displayed within the QPhoto application comprise of all the photos that are in the image library. In this view mode you are not able to modify the image library. To modify, please refer to section headed Maintaining a Case Image Library.

- a) A menu bar containing the options: (see figure 33)
- (i) **Previous** - changes the image view to the previous image available. If you are already at the first image you are informed of this and the current image remains.
 - (ii) **Next** - changes the image view to the next image available. If you are already at the last image you are informed of this and the current image remains.
 - (iii) **Exit** - Quits the QPhoto application.

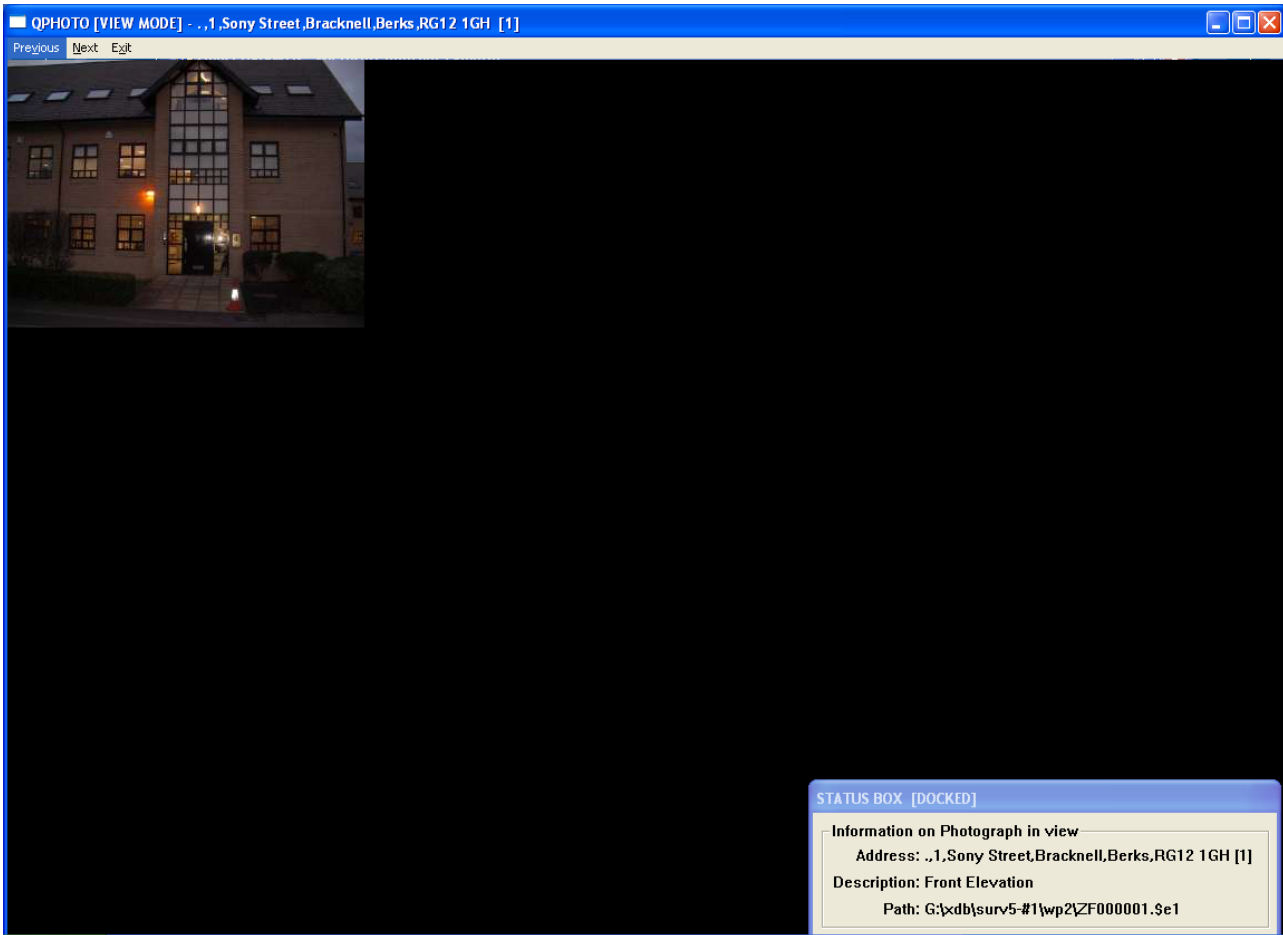


figure 32 Viewing Case Image Library

- b) The photograph view area that shows the current photograph.
- c) The status box which gives information on the current photograph including it's description and index position (this is shown in brackets after the address)

IMPORTANT NOTE

To indicate that you are viewing a case image library please note that the background colour is now black. A white background indicates viewing the Qphoto Library.


E-Signing a Photo-Enabled Form

This is no different from before, and if there is an image library available it is incorporated into the signed off form. No changes can be made to the image library on the signed off form – but changes can still be made to the image library.

When an e-signed form is subsequently viewed, if it is viewed on a photo aware DataWeb system then thumbnails of any images together with descriptions underneath are displayed at the top of the form. Clicking on one of the thumbnails will then display the full-size image in a popup window.

If an e-signed form with incorporated photos is viewed on a non-photo aware DataWeb system, or on a DOS system, the photo information is ignored and the form is displayed with no significant change.

CREATING AND ACCESSING A FORM

Select the case record on the Tramlines and click on the square button  on the left of the case to display the Attachments screen.

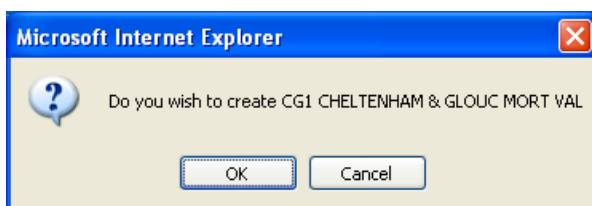
Click on report button to display the list of possible forms



figure 33 Forms Drop Down List


If the instruction was sent electronically then you might have a form brought to the top of the list above the dashed line.

To create a new form, click on the button labelled Reports which then generates the list of available forms. Highlight the form you wish to create from the list and then click on it. This will display a similar message to this.



To create the form click on OK or click on Cancel to reject your choice.

figure 34 Creating a Form

To amend a report that has already been created click on the  button.

To print of an existing report click on the  button.

Filling in a Form

Pressing F1 in a form will display a few short cut keys.



Other key functions within a report -

Home -Takes you to the beginning of the line you are on.

End - Takes you to the end of the line you are on.

Page Up - Scrolls the page up approximately one page at a time.

Page Down - Scrolls the page down approximately one page at a time.

Tab - Moves you down the report one section at a time.

Shift + Tab - Moves you up the report one section at a time.

Ctrl + Right Arrow - Moves you one word to the right.

Ctrl + Left Arrow - Moves you one word to the left.

Ctrl + Up Arrow - Takes you to the beginning of a section.

Ctrl + Down Arrow - Takes you to the end of a section.

Ctrl + C - Copies a highlighted section.

Ctrl + X - Cuts a highlighted section.

Ctrl + V - Pastes a previously cut or copied section.

Ctrl + A - Selects all the text in the section you are in.

Shift + Right Arrow - Highlights a letter at a time.

Shift + Ctrl + Right Arrow - Highlights a word a time.

F5 - Enters date.

BOLD, UNDERLINE, Centre:

To enable bold, underline or centre, use ^B, ^U or ^C. Using the centre command only applies to the line you are on, not the whole section. To disable the previous functions use ^b, ^u or ^c

For example, to produce the phrase: This is an example.

You would type the words "This is an" then press Shift + 6 U (which turns underline ON) then type "example." then press Shift + 6 u (which turns underline OFF again).

On your screen the character produced by the Shift + 6 Key is “^”.

Toolbar within the Form

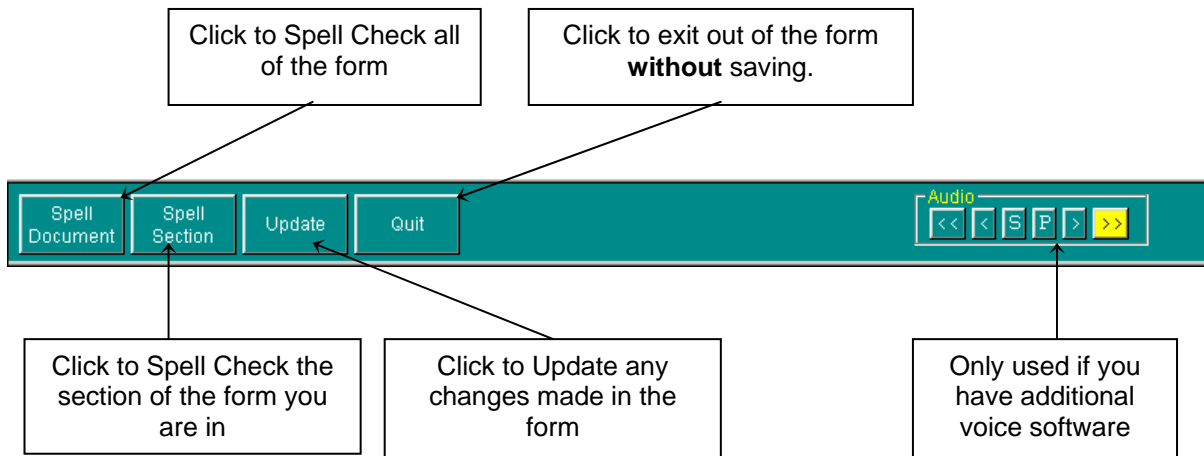


figure 35 Forms Tool Bar

Spell Checker

At any point you can either spell check the whole document or just the section that you are in.

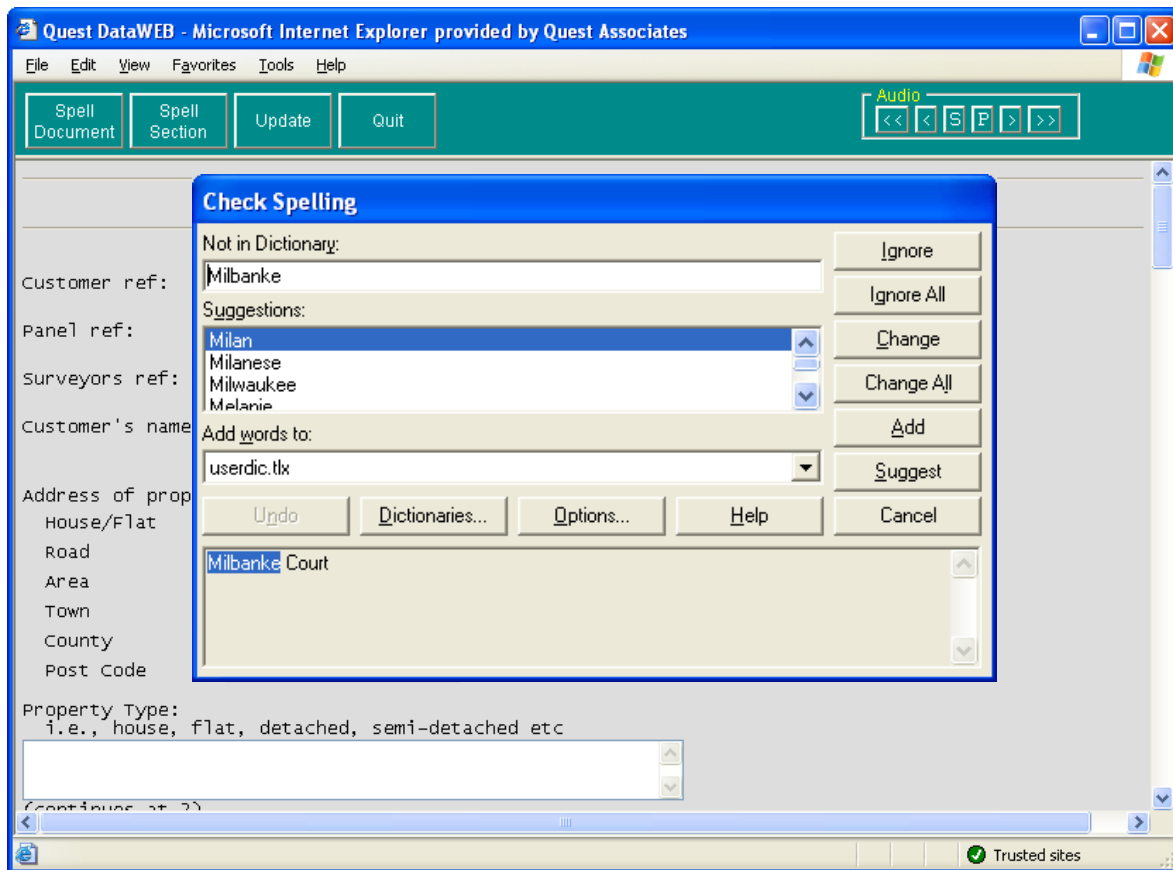


figure 36 Spell Checking a Form

If you click on Options the following box appear whereby you can customise what the spell checker will look for within the form.

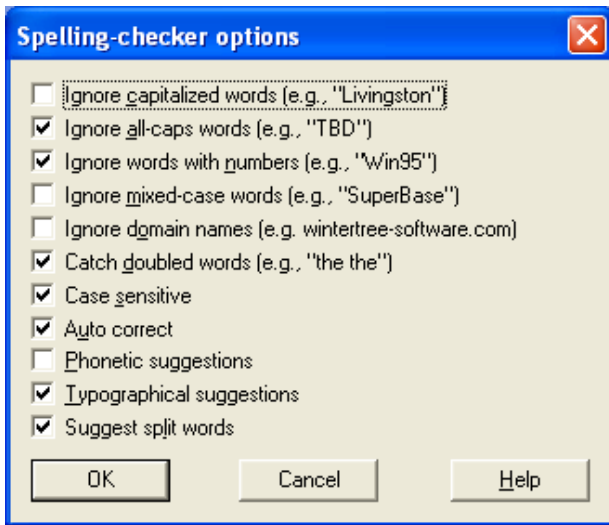


figure 37 Spell Checking Option

Entering Standard Phrases

Please note, when entering information into any form you may make use of "standard phrases". Your surveyor will have been provided with guidelines on certain sections. Instead of dictating the usual words he/she will dictate a paragraph number and phrase letter(s). You can enter just the paragraph number and phrase letter(s) into the computer and the appropriate phrases will be inserted for you. A list of phrases and their numbers are stored on the computer. Using standard phrases ensures the correct words are used in certain sections which in-turn allows information to be extracted from the form automatically.

To pull in a standard paragraph press the = key and you get a screen as below.

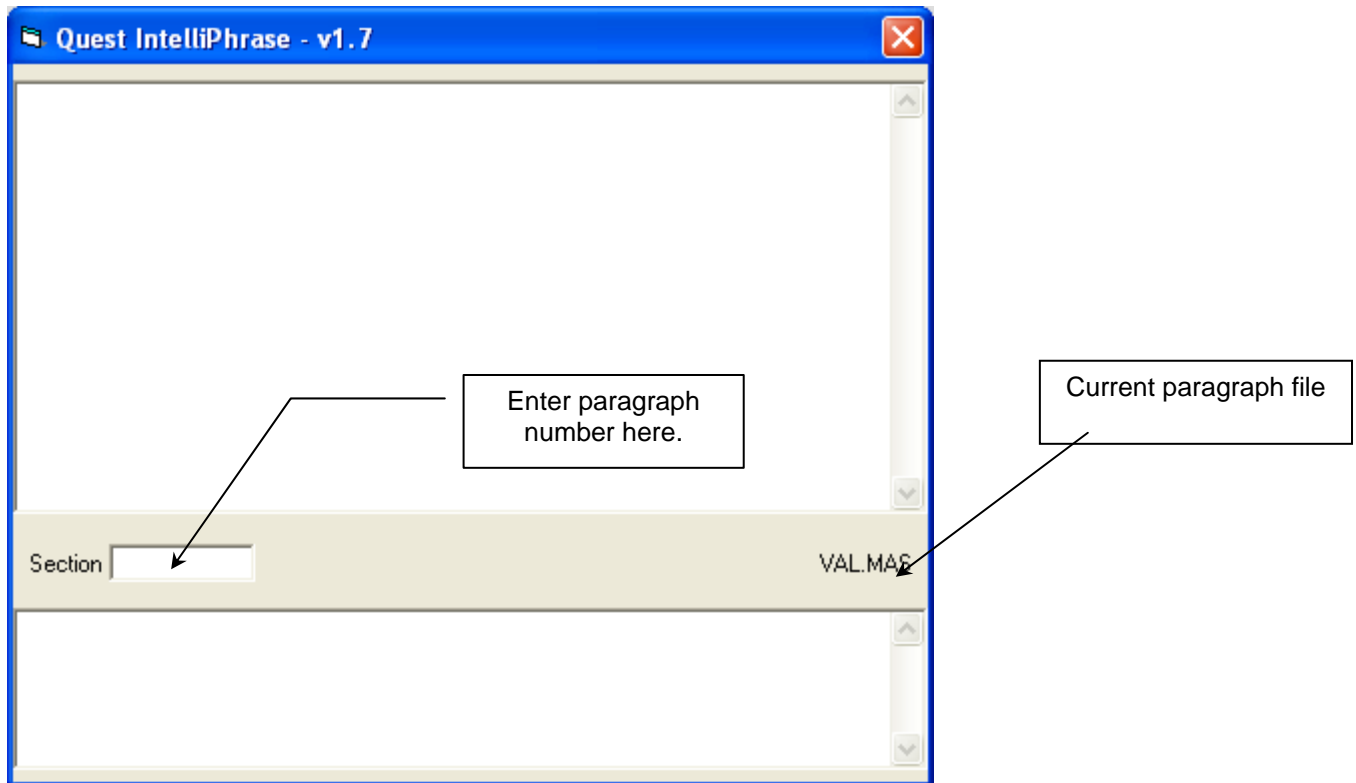
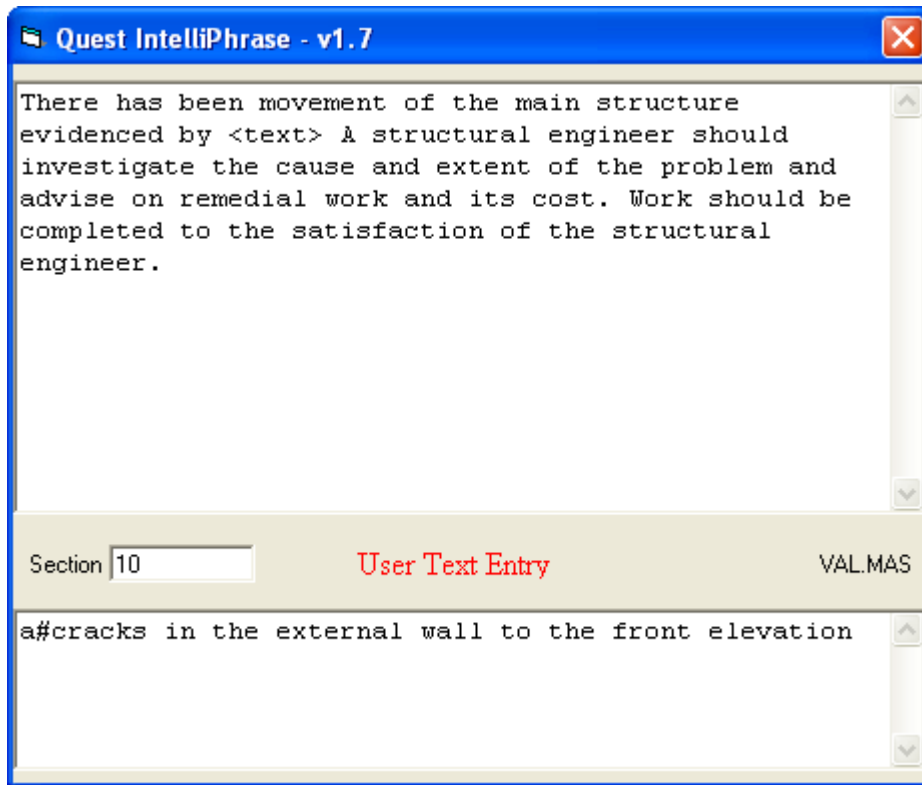


figure 38 Entering Standard Paragraphs

As default the system will always pull in the standard valuation phrase (VAL.MAS) unless there is a specific phrase file set up for that form. e.g. homebuyers will use HBN.MAS.

In some cases you may want to pull in a paragraph from a different phrase file. To do this, in the section box e.g. \HBN\ . This will then change you default phrase file from VAL.MAS to HBN.MAS

In some cases, there may be situations whereby there is a free typing section within a standard paragraph. This is represented by <text>.



The word <text> is replaced by what is filled in between the two # keys. Remember to end the text insert with a # e.g.

#Enter text here#

figure 39 Standard Paragraphs

ACCESSING A LETTER

To access the letters from the system you click on  from your Tramlines. From here you will see the drop down letters list where you can access the letters available to you.

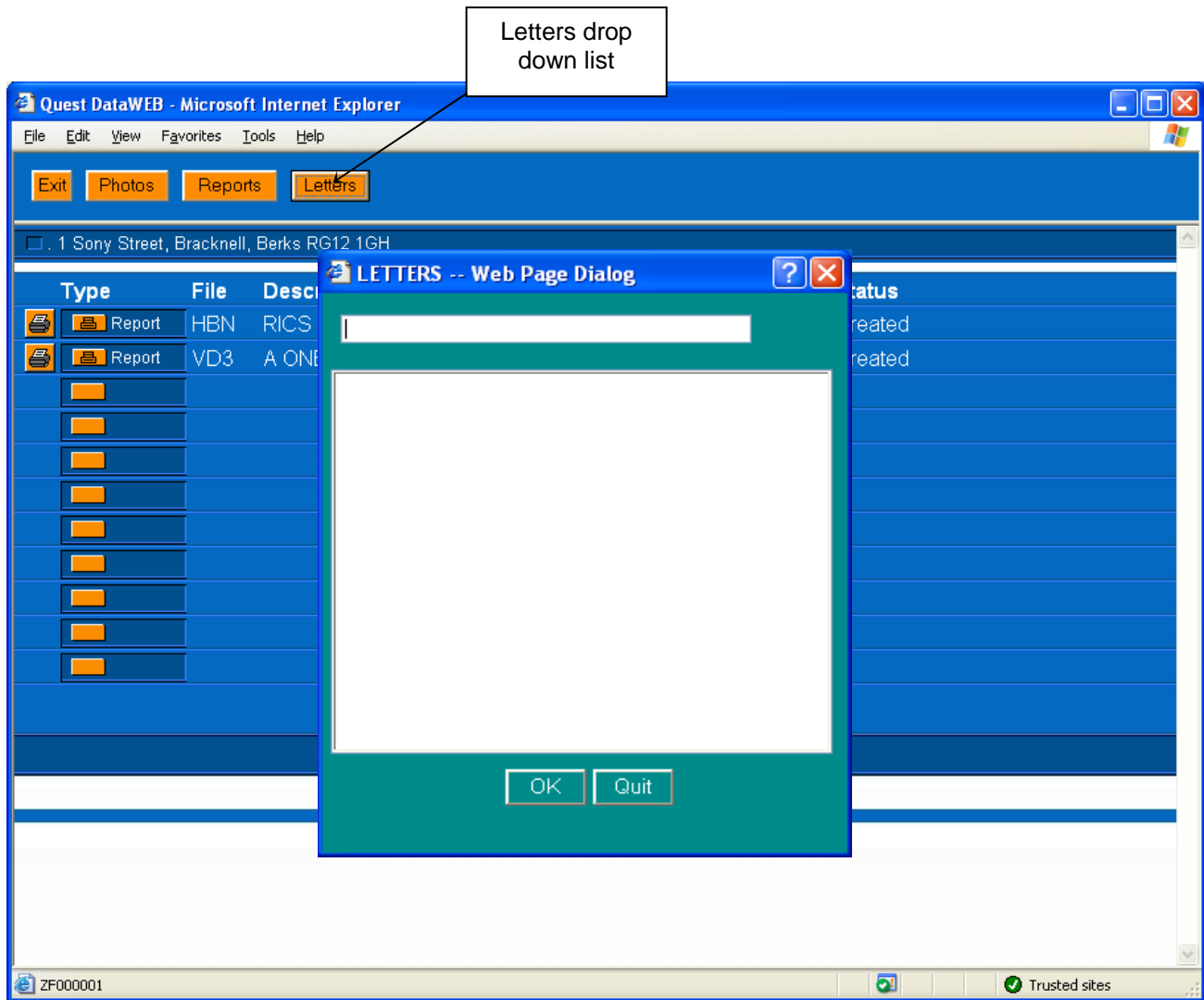


figure 40 Accessing Letters

Please note that if you wish to attach letters to the case then they must be constructed using Word 2000 or above.

CLIENT DATABASE

This option is for maintaining all lender information. The information that is changed within the section will not interfere with any jobs that you receive via the SPN (secure panel network). When clicking on this option it will produce a screen where you have the option to change/add to the lenders, branch and fees information.

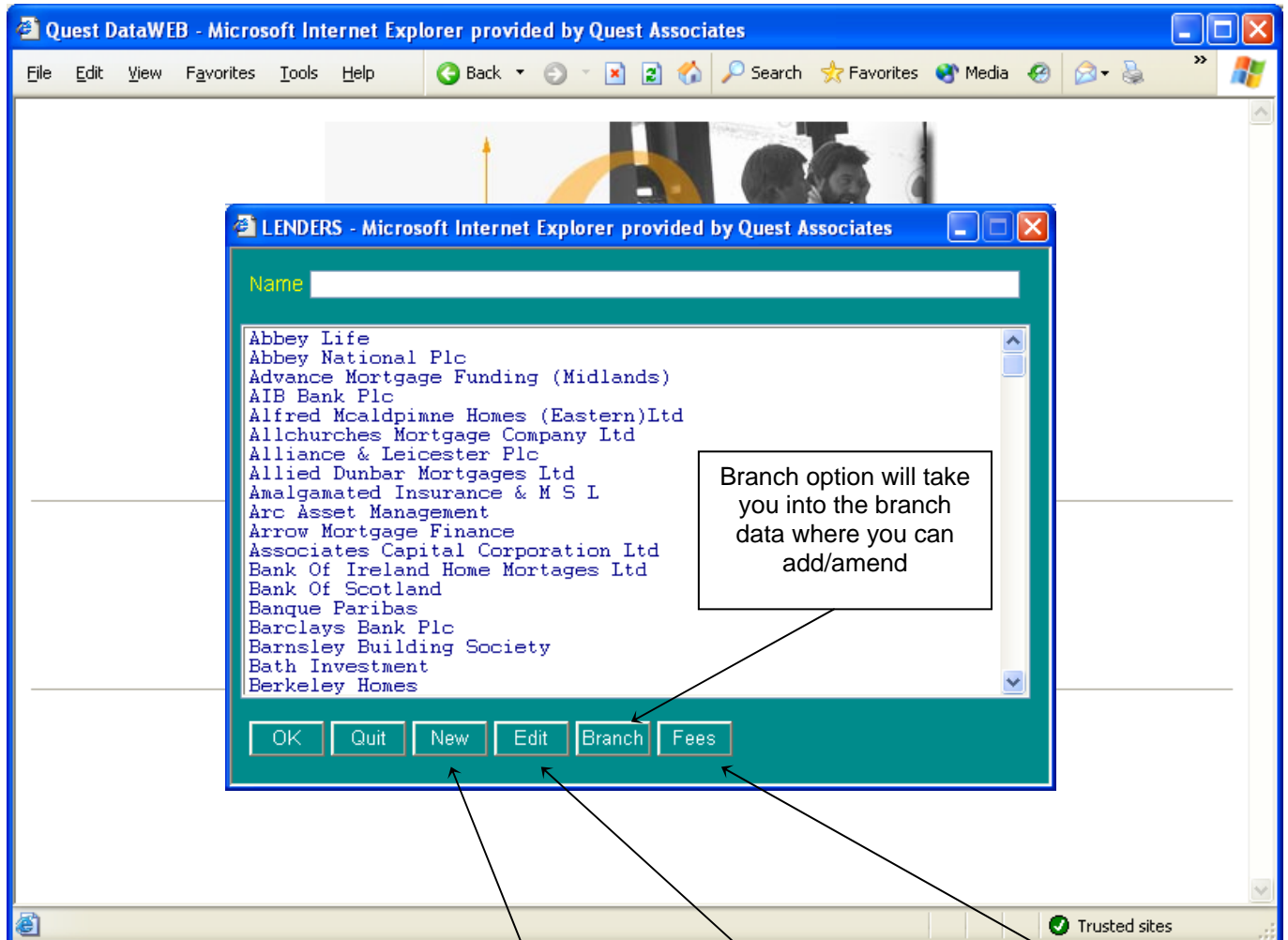


figure 41 Lender Maintenance

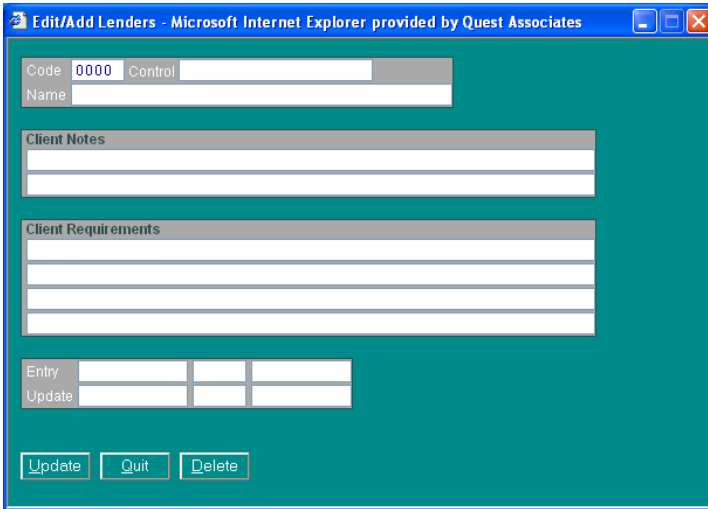
New button will allow you to add new lenders that may not appear in the list

Edit button will allow you to edit existing lenders that are set up

Fees option will take you into the fees data where you can add/amend

Adding a New Lender

To add a new lender is very simple to do. Clicking on New will allow you to add a new lender to your database. This will then allow you to put records on your system for that particular lender.



The screenshot shows a web browser window titled "Edit/Add Lenders - Microsoft Internet Explorer provided by Quest Associates". The page has a teal background. At the top, there are two input fields: "Code" with the value "0000" and "Control". Below these is a "Name" input field. There are two sections with headers and multiple input lines: "Client Notes" and "Client Requirements". Below these is a section with two rows of input fields labeled "Entry" and "Update". At the bottom of the form are three buttons: "Update", "Quit", and "Delete".

figure 42 Lender Details

The code is important; each lender has a different code on your system, you shouldn't have any two lenders with the same code. If there are any requirements that the lender wish for you to carry out then the details are entered on this page. Once you have filled in the details, click on Update to save the changes that you have done.

BRANCH DATABASE

Clicking on the Branch button will take you into the Branch Database for the particular lender that is highlighted at the time.

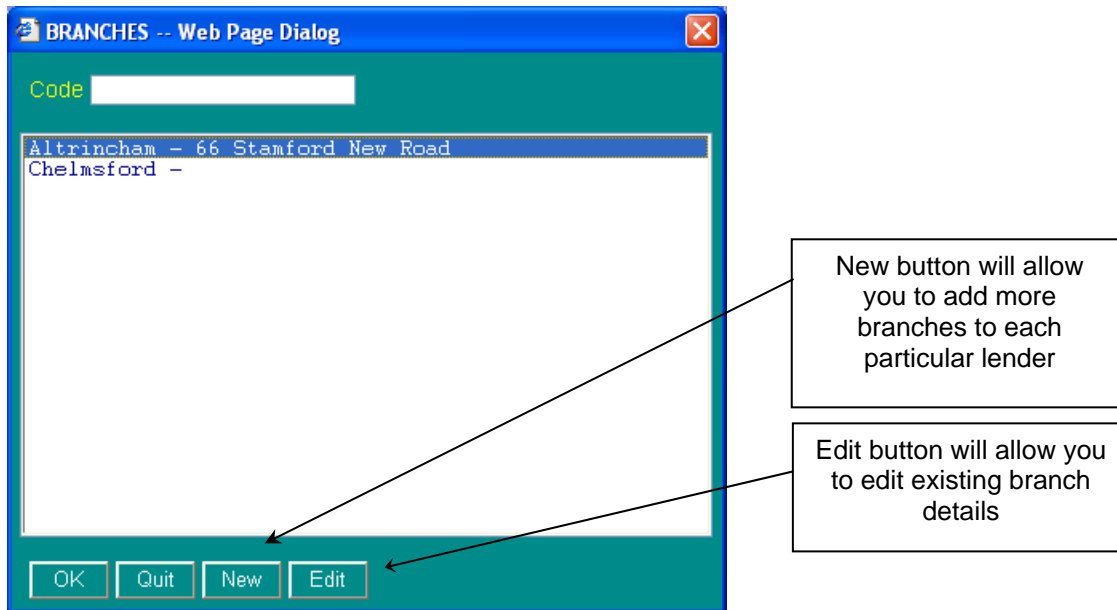


figure 43 Branch Information

Adding a New Branch

Clicking on the New button will allow you to add a new branch to your system.

The screenshot shows a web browser window titled "Edit/Add Branches - Microsoft Internet Explorer provided by Quest Associates". The page contains a form with the following fields: "Name", "House", "Road", "Area", "Town", "County", and "Postcode". Below these are fields for "Tel.", "Fax", and "DX". There is a "Display" dropdown menu. At the bottom, there are three buttons: "Update", "Quit", and "Delete".

Fill out the relevant details for the new branch, and then click on Update to save.

figure 44 Branch Details

FEES DATABASE

Clicking on the Fees button will take you into the Fees Database for the particular lender that is highlighted at the time.

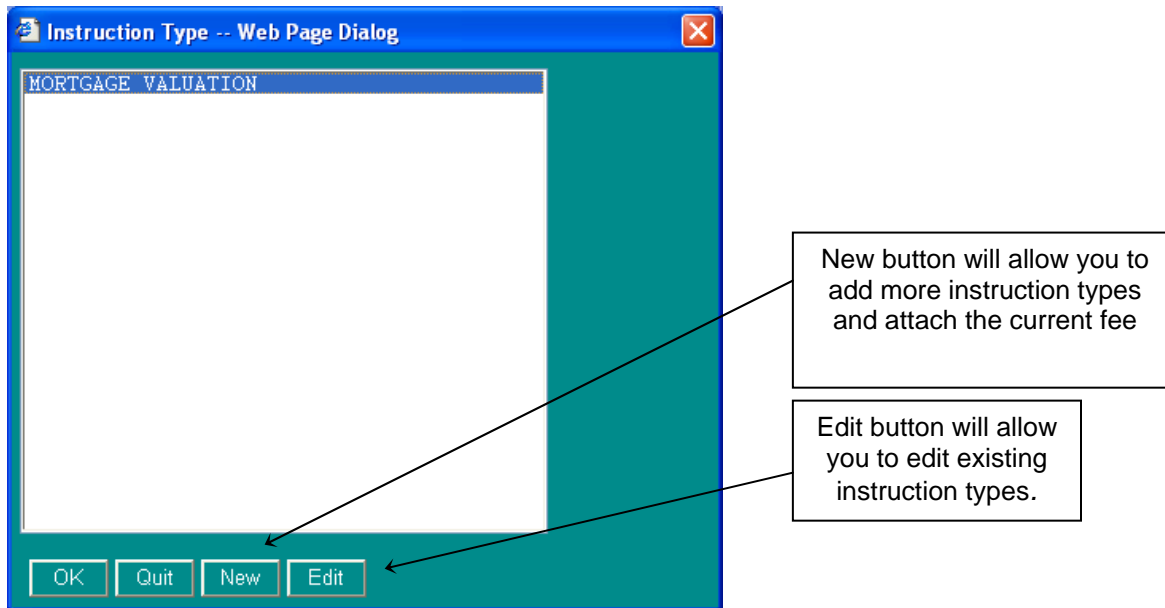


figure 45 Instruction Types

Adding a New Fee

Clicking on the New button will allow you to add different instruction types to your system.

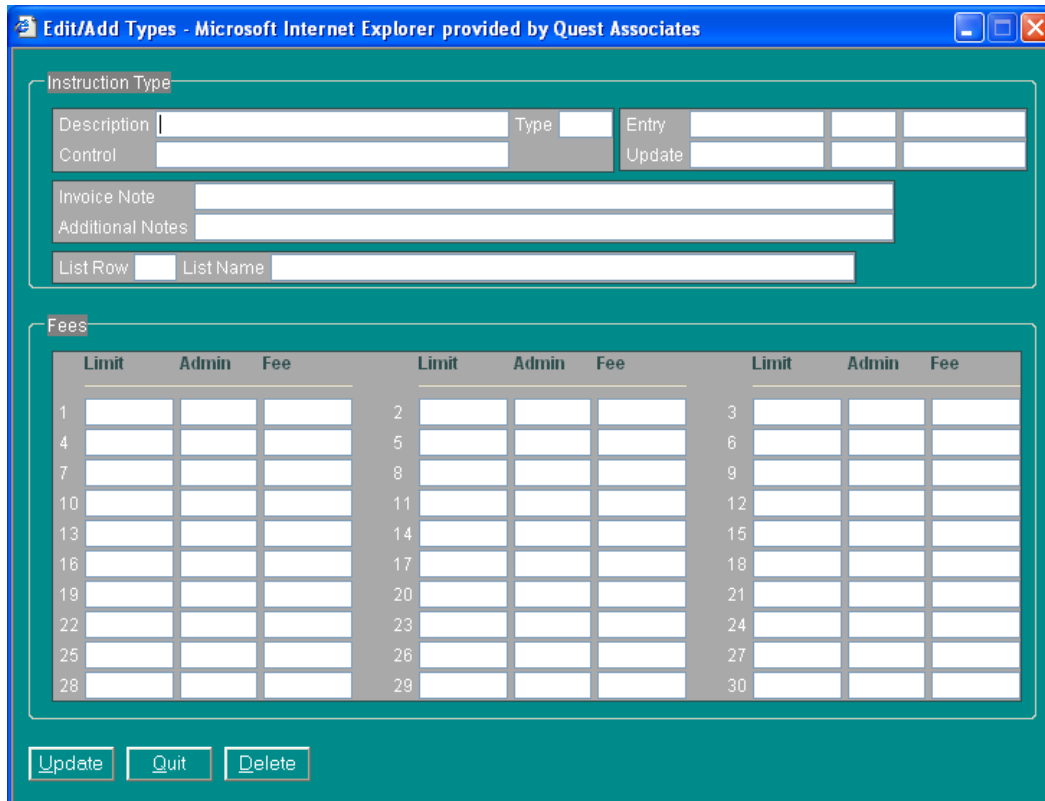


figure 46 Instruction Types/Fees

- 1) **Description** - the type of instruction e.g. Mortgage Valuation
- 2) **Type** - instruction type code that is relevant to the instruction type e.g. MV. The following instruction types are recognized by the SPN.
 - IL (Investment home loan, also known as buy-to-let)
 - MV (Mortgage Valuation)
 - TR (Transcription)
 - SS (Building Survey)
 - RI (Re-Inspection)
 - RV (Re-Valuation)
 - RM (Re-Mortgage)
 - FA (Further Advance)
 - DP (Drive Past)
 - S2 (Scheme 2 – Mortgage Val + Homebuyers)
 - RP (Re-Possession)
 - HB (Homebuyers)
 - SC (Second Charge)
 - RL (Re-Location)
 - DV (Desktop Valuation)
 - PV (Private Valuation)
- 3) **Control** - there are three things that you can specify with this field.
 - a) **FM** = specifies what form you wish the surveyor to use e.g. FM=AB1
 - b) **FS**= if you have more than one instruction type set-up you must distinguish between which set of fee scales the system will use e.g. FS=A FS=B etc.
 - c) **CP**= any requirements that you wish the system to do. Generally you will only use CP=P, this will print a full set of valuations reports off at esign.
- 4) **Invoice Note** - this will hard wire any lender requirements into the invoice page
- 5) **Additional notes** - this will hard wire any lender requirements into the Notes 1 section on the instruction page e.g. Homebuyers report is required.
- 6) **List Name** - this is automatically generate using the information that has already been filled in certain sections
- 7) **Limit** - The maximum purchase price before the fee scale changes
- 8) **Fee** - The amount that will be charged for the survey depending on the purchase price.

PANEL DATABASE

The Panel Database is accessed from the Quest Front Menu.

The Panel Database contains surveyor records, including any panel surveyors. It operates in a similar way to the Case Database, with a Tramlines screen. Click in the Tramlines to display the required surveyor's record.

The first page identifies the surveyor, office address, and the SPN code for panel surveyors, if they are connected to the SPN.

The screenshot shows a web browser window titled "Quest DataWEB - Microsoft Internet Explorer provided by Quest Associates". The browser's menu bar includes "File", "Edit", "View", "Favorites", "Tools", and "Help". The page has a teal header with "Update" and "Quit" buttons. Below the header are tabs for "Detail 1", "Detail 2", "Postcodes A", and "Postcodes B". The main content area is a form with the following fields:

- Code:
- Type: **Panel** (dropdown menu)
- Group:
- EM Office:
- SysRef:
- Name:
- House:
- Road No:
- Area:
- Town:
- County: PC:
- Tel 1:
- Tel 2:
- Fax:
- Cost Cen:
- Qual:
- Num:
- SPN:

At the bottom of the form is an "Entry" section with a "Update" button and several empty input fields. The browser's status bar at the bottom shows "Done" and "Trusted sites".

figure 47 Surveyor Record in the Panel Database

The second page in a Panel Record is used for Panel Management purposes.

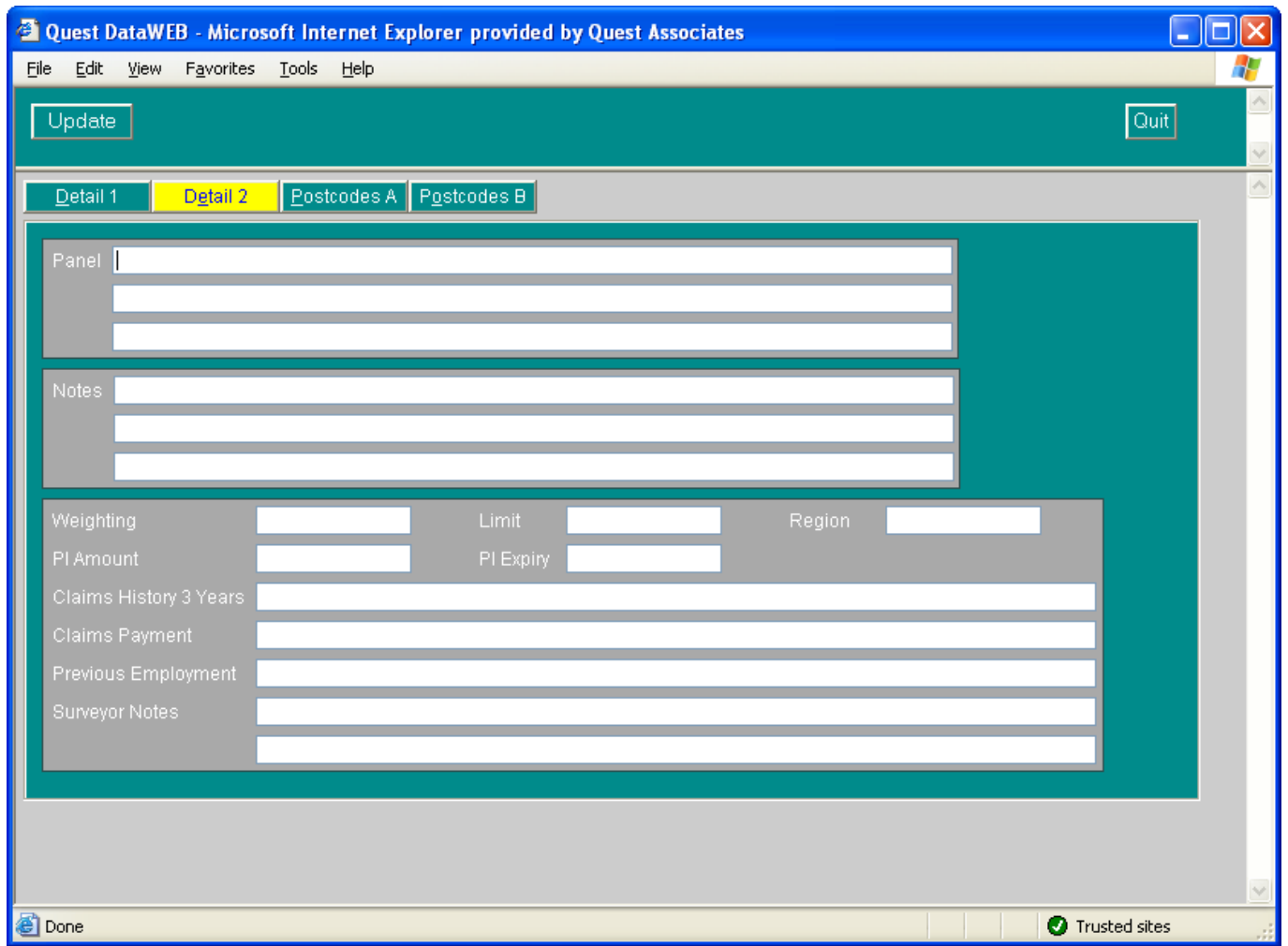


figure 48 Panel Management Details

The third and fourth pages in a Panel Record are used to list the surveyor's postcode areas.

The picture shows the surveyor covering all areas under "RG", plus "SL" areas 1 and 2, 6 to 10.

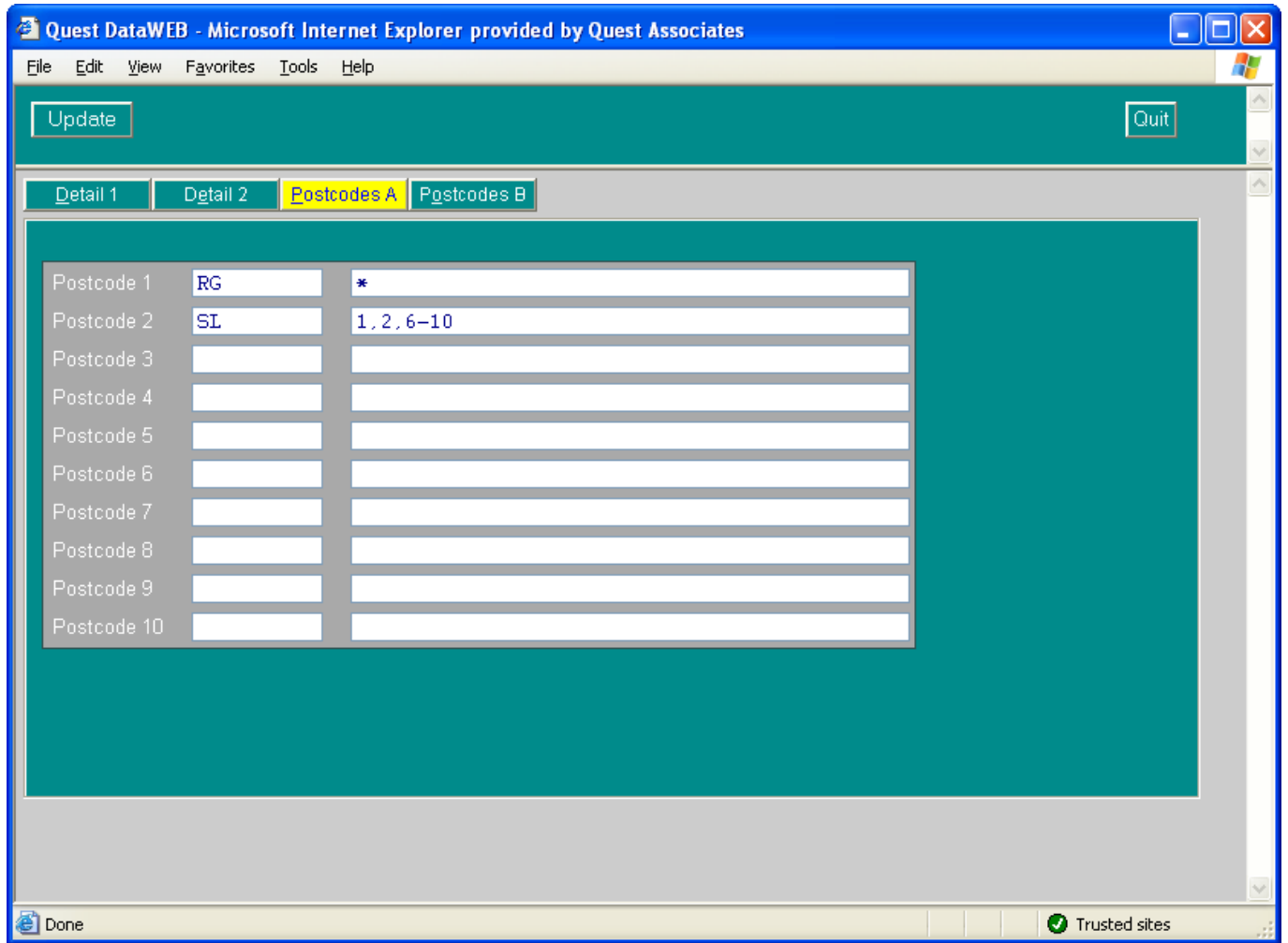


figure 49 Surveyor's Postcode Areas

RUNNING REPORTS FROM QUEST

There are 3 ways that you can run reports from Quest.

Comparables Reports which are accessed from the Quest Front menu

Management Reports which are accessed from the Quest Front Menu

General Reports which are accessed using the reports button within the Case Database Tramlines

Comparables Reports

From the Quest Front Menu by clicking on Comparables Report. This will bring up the Comparable Search Option screen (Figure 48 Comparables Options). From this screen you can select the type of property on which you would like to perform a comparable search and you can also filter your search on certain criteria.

Click in the box to put in or take out the tick

The screenshot shows a web browser window titled "Quest DataWEB - Microsoft Internet Explorer provided by Quest Associates". The browser's menu bar includes "File", "Edit", "View", "Favorites", "Tools", and "Help". The main content area has a teal background and contains two sections: "Search" and "Filter".

The "Search" section includes input fields for Postcode, Type, Style, Beds, Recs, Garage, and Heating. To the right of these fields are checkboxes for "Use Type", "Use Style", "Use Beds", "Use Recs", "Use Garage", and "Use Heating".

The "Filter" section includes input fields for Age (with "To" fields), Price (with "To" fields), Surveyor, and Instruction From. To the right are checkboxes for "Use Age", "Use Price", "Use Surveyor", and "Use Instruction Source".

At the bottom of the form are three buttons: "Run", "Quit", and "Clear".

Annotations with arrows point to the "Use Type" checkbox and the "Run", "Quit", and "Clear" buttons.

figure 50 Comparables Options

Click on Run to run the Comparables Report

Click on Quit to leave Comparables Report

Click on Clear to clear all details of previous search.

Below is an example of how the data found is displayed.

COMPARABLES produced on 28 APR 2004 12:46

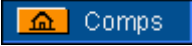
Selection = Postcode: SL6, Type: ALL, Style: ALL, Beds: ALL, Recs: ALL, Garage: ALL, Heating: ALL

%	Ref	Date of Valuation	Post Code	Address	Insp Type	Prop Type	Bed	Rec
98	ZY000024	17 FEB 2004	SL6 6SQ	h, 23, Alwyn Road, Maidenhead, Berk	S2			
96	ZY000025	31 OCT 2003	SL6 7JZ	SL6 7JZ	S2			
95	BA000016	08 SEP 2003	SL6 7NA	Quest House, 5, Elton Drive, Maiden	MV			
52	BA000036	23 JUN 1998	SL6 7NA	Quest House, 5, Elton Drive, Maiden	MV			
30	BA000033	18 AUG 1995	SL6 7NY	The Maltings, 35, Crest Road, Maide	MV	H D	4 2	1949
30	BA000037	11 SEP 1995	SL6 7NA	Quest House, 5, Elton Drive, Maiden	MV		0 0	
30	??000002	18 AUG 1995	SL6 7NY	The Maltings, 35, Crest Road, Maide	MV	H D	4 2	1949
30	BA000035	18 AUG 1995	SL6 7NA	Quest House, 5, Elton Drive, Maiden	MV	H S	3 2	1965
30	??000003	18 AUG 1995	SL6 7NY	The Maltings, 35, Crest Road, Maide	MV	H D	4 2	1949
28	BA000018	22 JUN 1995	SL6 7NA	Wbd House, 54, Wood Drive, Maidenhe	MV		0 0	
28	BA000007	20 JUN 1995	SL6 7NA	Quest House, 5, Elton Drive, Pinkne	MV		0 0	1949
28	BA000008	13 JUN 1995	SL6 7NA	Quest House, 5, Elton Drive, Maiden	MV	H S	5 2	1 1948
28	BA000017	22 JUN 1995	SL6 7NA	Wbd House, 54, Wood Drive, Maidenhe	MV		0 0	
28	BA000010	13 JUN 1995	SL6 7NA	Quest House, 5, Elton Drive, Maiden	MV	H S	5 2	1 1948
28	BA000015	22 JUN 1995	SL6 7NA	Wbd House, 54, Wood Drive, Maidenhe	MV		0 0	
28	BA000009	13 JUN 1995	SL6 7NA	Quest House, 5, Elton Drive, Maiden	MV	H S	5 2	1 1948
25	XX000006	14 FEB 1995	SL6 7NA	Tretet, Terter, Erte, Ert Ert, Ert	MV		0 0	
22	SP000040	28 SEP 1994	SL6	21, Coppetts Road, Southgate, Londo	HB		0 0	
22	XX000007	28 SEP 1994	SL6	21, Coppetts Road, Southgate, Londo	HB		0 0	

Click on the blue circle to take you into the Record Card for that address.

Click on Back to return you to the Comparables option screen.

figure 51 First Way to Display Comparables

From the Case Database Tramlines click on Comps button , will bring up the Comparable Search Option screen (Figure 48 Comparables Options).

Below is an example of how the data found is displayed.

Click in box to put a tick next to any record you want the details to be printed.

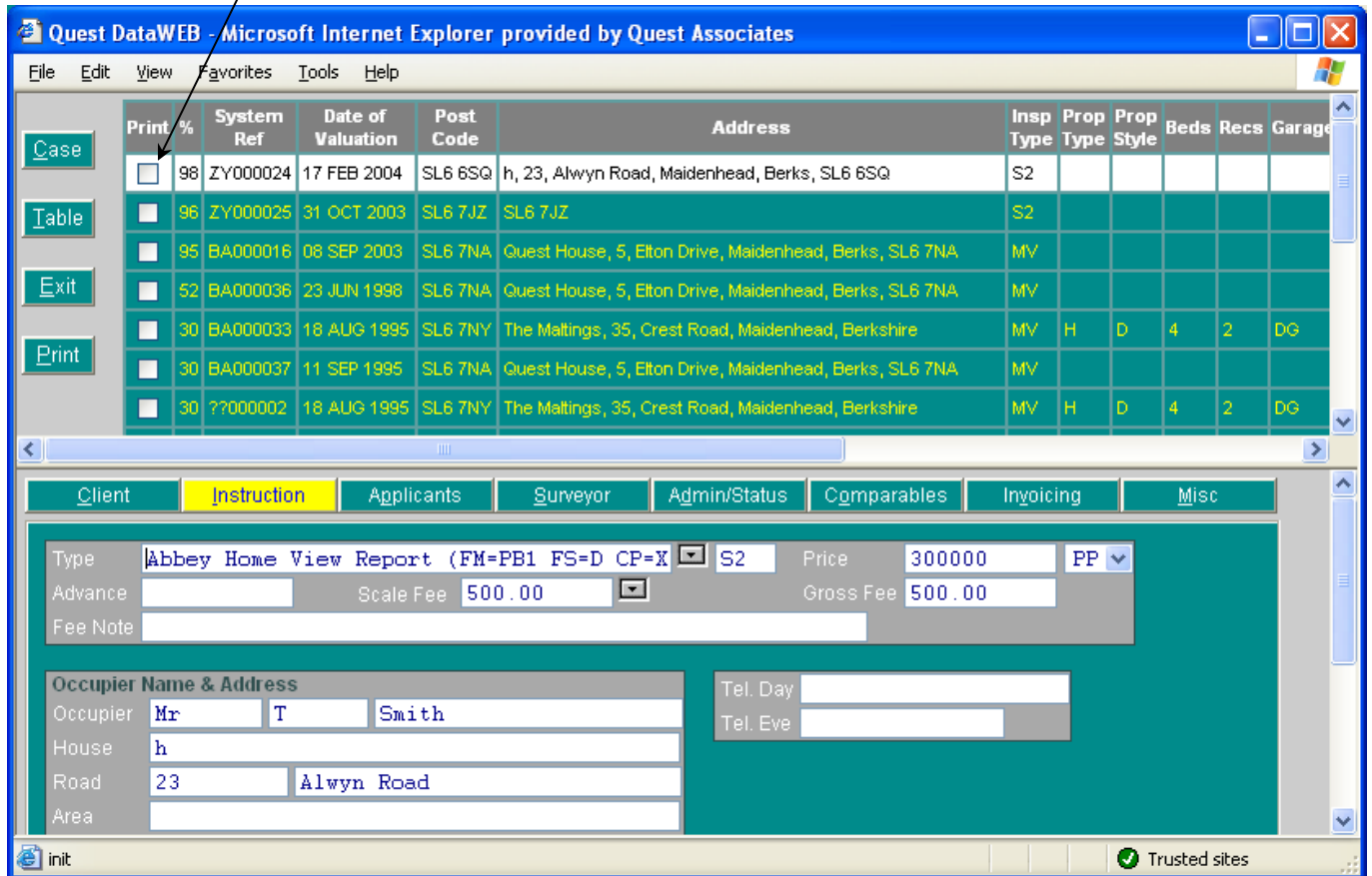


figure 52 Second Way to Display Comparables

The highlighted record is displayed in the lower section. The buttons at the top perform the following functions.

Case - Click to enlarge the Record Card to its full size. To return to initial screen click on Case again.

Table - Click to display just the table of results. To return to initial screen click on Table again.

Exit - Click to return to Comparable Search Option screen (Figure 48 Comparables Options).

Print - Click to print out the comparables for any records with a tick in the print box.

Management Reports

Management Reports – Viewing

Management reports are accessed from the Quest Front Menu by clicking on the option for Management Reports.

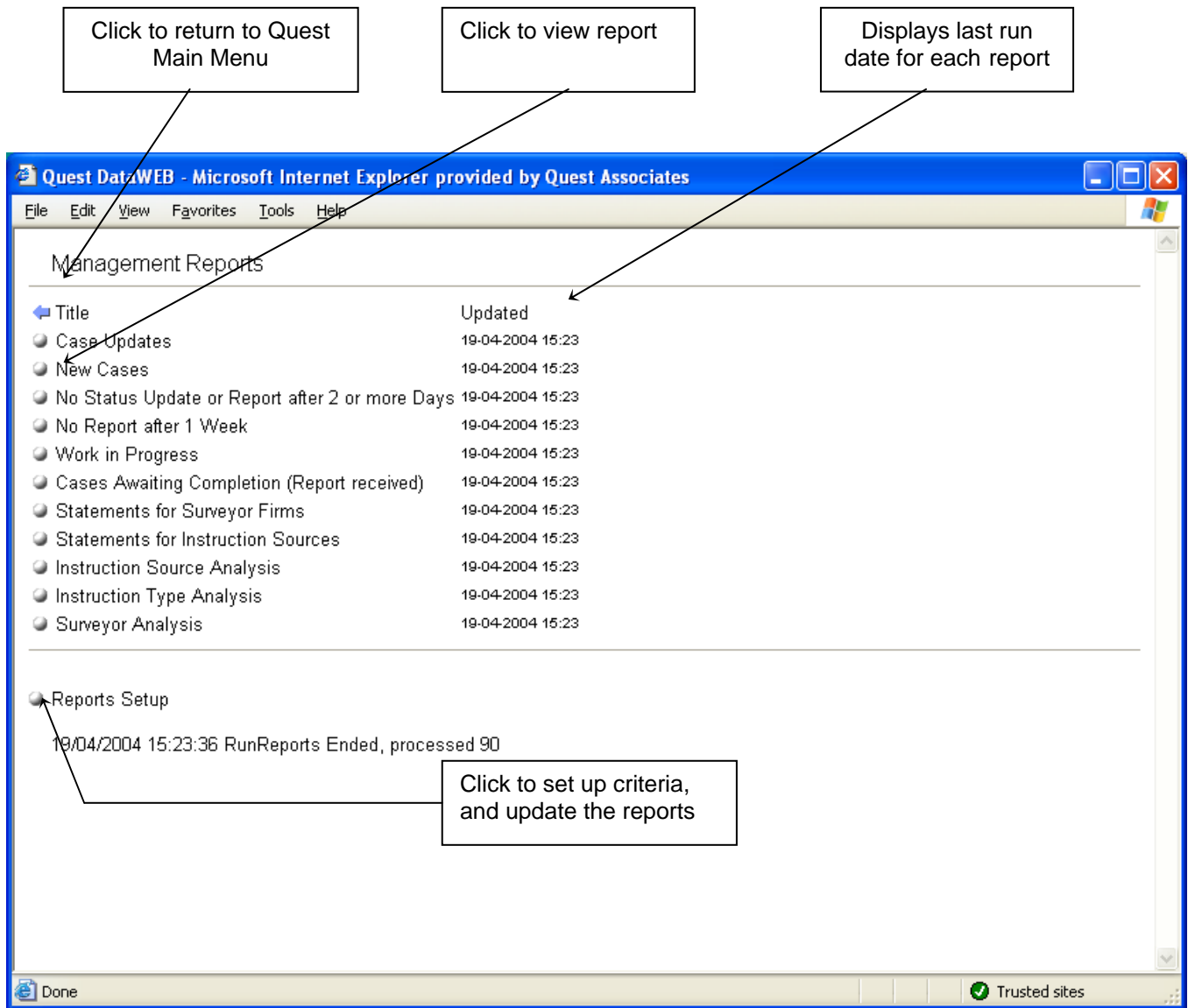


figure 53 Management Reports Menu

Click on the button next to a report title to view the report. If the report has been consolidated, you will be able to click down to a lower level, sometimes referred to as "drill down". If the lower level is listing individual cases, then the drill down will jump you directly to the record in the case database.

Displayed reports can be printed by via the menu options at the top of the screen - File, Print.

Management Reports – Running

From the Management Reports Menu (Figure 51 – Management Reports menu), click on the Report Set Up button. This will display the set up screen (Figure 52 – Management Report Set-up Screen).

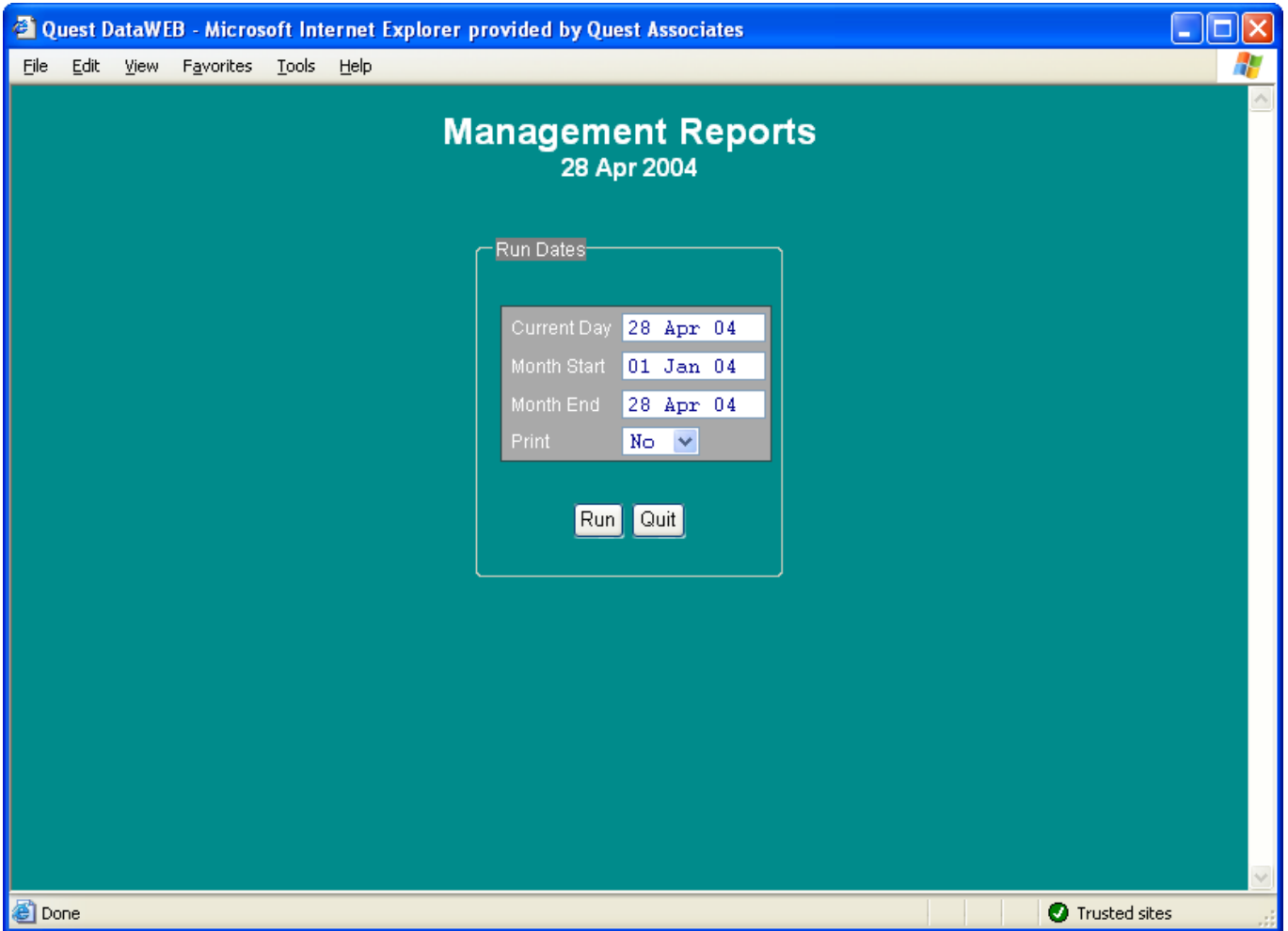


figure 54 Management Report Set-up Screen

Enter dates in the format shown (DD MMM YYYY), for the:

Current Day,

Month Start,

Month End,

Start and end dates are for the reporting period you require. For example, for the month of April 2004, enter – Start Month "01 APR 2004" – End Month "30 APR 2004". The Current day is the date required for monitoring reports, such as new instructions.

General Reports

The last way is to run reports from the Report list. Each database has a set of "standard" report lists attached to it. To access the reports list from the Tramlines screen click on the reports button.

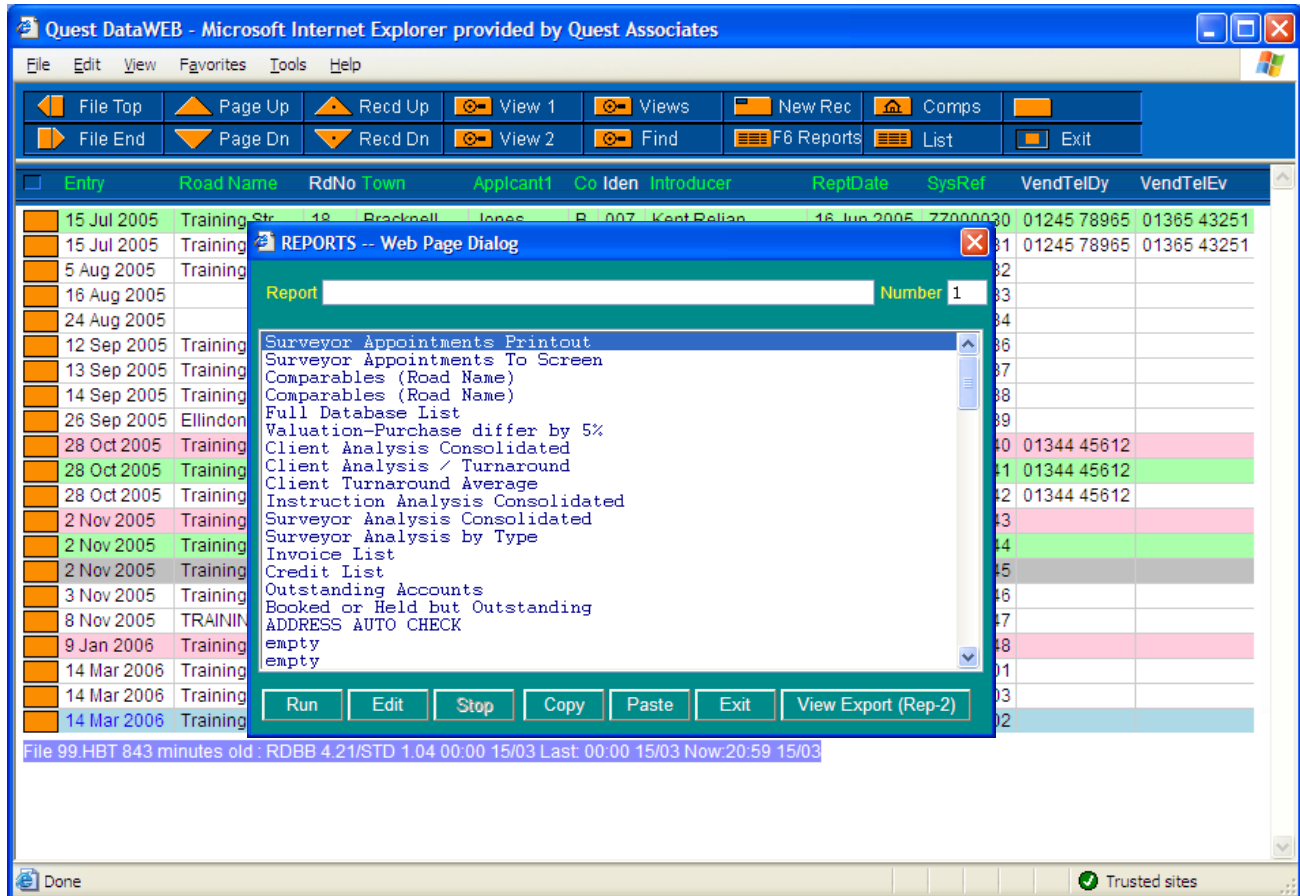
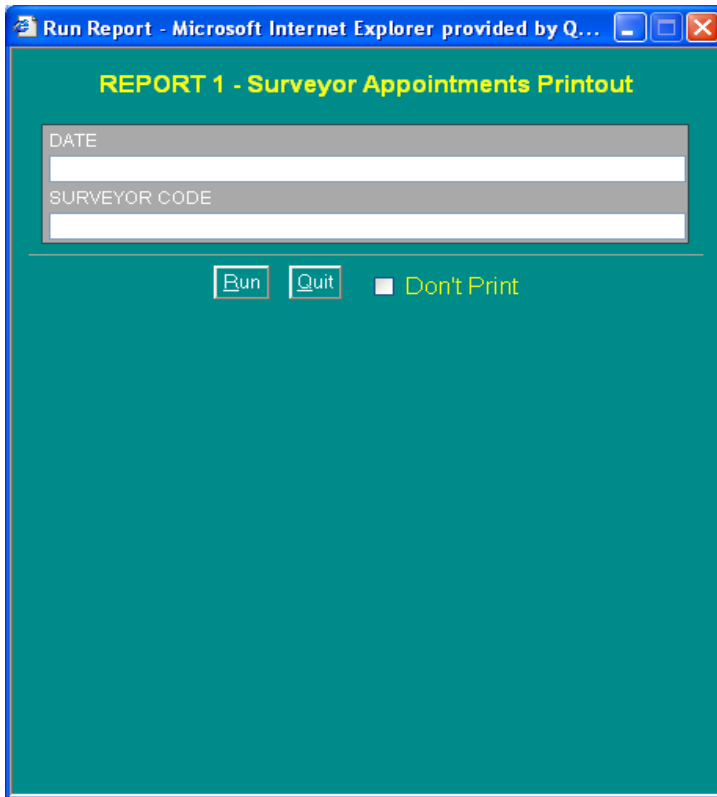


figure 55 Reports List Screen

Running a Report

You will have had some "standard" reports set up for you. The Surveyors Appointment Printout is one of them. To run this report, scroll down the report list to Surveyors Appointment Printout, click on it and then click on run. Enter a date or date range for the report, e.g. 01 JULY 01 > 05 JULY 01 and click on run.



The screenshot shows a web browser window with a teal background. At the top, the title bar reads "Run Report - Microsoft Internet Explorer provided by Q...". Below the title bar, the text "REPORT 1 - Surveyor Appointments Printout" is displayed in yellow. There are two input fields: "DATE" and "SURVEYOR CODE". Below these fields, there are three buttons: "Run", "Quit", and a radio button labeled "Don't Print".

figure 56 Running a Quest Report

Report lists are used to do complicated (or easy) searches of the database and to print out onto paper (or save to file) the results. Each report list requires two main pieces of information - what to search for and how to print it out. Once the report list has been set-up with this information it can be used again and again simply by selecting and "running" that report list. Typically a system would contain several report lists for such things as checking for unpaid accounts, analysing what type of work has been undertaken etc.

Viewing Reports to Screen

After running a report you have the facility to view the report to screen by clicking on the



Quest DataWEB - Microsoft Internet Explorer provided by Quest Associates

File Edit View Favorites Tools Help

File Top Page Up Recd Up View 1 Views New Rec Comps
File End Page Dn Recd Dn View 2 Find Rpt Print Database Exit

Entry	Road Name	RdNo	Town	Applicant1	Co	Iden	Introducer	ReptDate	SysRef	VendTelDy
5 Aug 2005	Training Str	25	Training	Thompson	B	001	Abbey Natio	5 Aug 2005	ZZ000032	
28 Jan 2005	Lindenhill R	4	Bracknell	Thomas	H	001	Allchurches	31 Jan 2005	ZZ000003	01344 457
28 Jan 2005	Honeyhill Road	6	Bracknell	Crossley	B	001	Central Mortgage Administration Ltd	28 Jan 2005	ZZ000004	
1 Feb 2005	Kennel Lane	4	Bracknell	Britten	B	001	Kent Relian	1 Feb 2005	ZZ000007	01344 412
28 Jan 2005	Richley Aven	54	Bracknell	Chamberlain	B	001	Mr H Chambe		ZZ000001	01344 456
1 Feb 2005	Moordale Ave	4	Reading	Tiple	B	001	(Private Cl		ZZ000009	0118 325 :
1 Feb 2005	Shepherds La	4	Bracknell	Harper	B	001	Kent Relian	1 Feb 2005	ZZ000011	01344 124
15 Mar 2005	Training Str	75	Bracknell	Jones	B	001	Mr T Jones	15 Mar 2005	ZZ000018	
1 Feb 2005	Woodland Wal	43	Binfield	Doolittle	B	001	Cheltenham	27 Apr 2005	ZZ000010	01344 456
1 Jun 2005	Woolhampton	43	Bracknell	Little	B	007	Nottingham	1 Jun 2005	ZZ000023	01344 451
5 Jul 2005	Training Str	1	Training	Smith	B	007	(Private Cl	15 Jul 2005	ZZ000028	
12 Sep 2005	Training Str	25	Bracknell	Thomas	B	001	Kent Relian	12 Sep 2005	ZZ000036	
13 Sep 2005	Training Str	76	Bracknell	Jones	B	001	Kent Relian	13 Sep 2005	ZZ000037	
14 Sep 2005	Training Str	25	Bracknell	Jackson	B	001	Abbey Natio	14 Sep 2005	ZZ000038	
24 Aug 2005					B	007			ZZ000034	
13 Jun 2005				Smith	B	007	(Private Cl		ZZ000024	
12 Apr 2005	Training St	5	Bracknell		B	007	(Private Cl		ZZ000020	
13 Jul 2005	Test	123	Test		B	020	cnl - pk -	13 Jul 2005	ZZ000029	
15 Jul 2005	Training Str	18	Bracknell	Jones	B	007	Kent Relian	16 Jun 2005	ZZ000031	01245 789
26 Sep 2005	Ellindon	93	Peterboroug		B	007	(Private Cl	10 Jan 2006	ZZ000039	
16 Aug 2005			Bracknell		B	007	Kent Relian	31 Oct 2005	ZZ000033	

List of 24 records found by report 13 on 16/03/2006 at 12:58:58
File 99.HBT 959 minutes old : RDBB 4.21/STD 1.04 00:00 15/03 Last: 00:00 15/03 Now:20:59 15/03

Trusted sites

figure 57 Report Results to Screen

From here you are able to print the results out by clicking on the



this will give to the option to print at all the results for a certain page range of results.

To return back to usual database viewing, simply click on



button.

CREATING A NEW REPORT

To add a new report to the list - scroll down to an empty line and click on Edit. (See below - "What's in a Report") to find out how to fill it in.

What's in a Report - Setting up reports can be complicated and in some cases can be as involved as computer programming. However, to set up a simple report is reasonably straight forward, especially if you already have some existing reports on your system that you can use as examples. A report list contains four pages of information of which only pages 1 and 3 are normally used: -

PAGE 1 – Criteria

Field	Op	Criteria
54	X	?D DATE
	*	%
66	=	? SURVEYOR CODE
149	?	
10	!=	CO

figure 58 Criteria Page of a Report

At the top you will need to enter a descriptive name for the report e.g. "Surveyor Appointment Printout" where it says Report Name.

In order to find information, you need to tell the computer what to look for. You do this by entering a "field" and what it must equal. For example: if you wish to find all the records in a certain post code then you would set the FIELD to the post code field number, let's say the post code is field 7 - then you would set it to 7, the OP to " = " and the TEXT to the post code you are searching for e.g. SO for Southampton. Of those in Southampton, if you then wish only to find records where a "money" figure exceeded £100,000 you might set the FIELD to the "money" field, say field 35, the OP as " > " (which means greater than (explained next)) and the TEXT as 100000. This would be filled-in on the second line of the search details. When the report was "run" it would find all records that had post codes with "SO" in them that also had a money figure in excess of 100,000. On screen it would look like: -

Field	Op	Text
7	=	SO
35	>	100000

Often, you will not know which field number represents, which field. Click on Show Fields button at the bottom of the screen and a screen displaying field numbers appears. From here you can see the field number you want.

Apart from " = " and " > " there are several other OP's (operators) that you can use: -

Op Means

- = Equal to
- < Less than
- > Greater than
- <= Less than or equal to
- >= Greater than or equal to
- != Not equal to
- <> Within a range (enter a range into Text e.g. 1 > 8)
- X Set as index
- ? Is record field blank
- OR and - in Text allows a second set of conditions
- * and % in Text prevents following search fields to pass a blank
- * and = in Text causes all following "=" to match exactly
- : and a File Name in Text causes a grouping file to be loaded
- * and C in Text will filter a report by a calculation e.g. (* C #54 D #8 > 4)

Above example will find cases whereby the appointment date is greater than 4 working days after the entry date.

You enter the search value or text under the "Text" heading. However, to allow different search text each time the report is used, you can prompt the operator by placing a question mark followed by a space followed by a prompt in the text field e.g. "? NAME".

Use "?D (Your Prompt)" as a special case when handling dates. This tells the computer to check that the date has been entered correctly and thus prevents errors. Use "?K (Your Prompt)" as a special case when handling postcodes, this prevents confusion between 0 and O (letter O and number 0) in postcodes.

If you wish to search over a limited number of records, e.g. only records for last month then, provided the "date field" on the records has been set-up as an index, you can set the first search criteria to date and use an index OP "X". This will greatly speed up the search, as only the relevant records will be checked - especially if you have a large number of records. The index setting is often used with a range

e.g. "1 JAN 91 > 1 MAR 91", the ">" symbol is used to mark the range. On screen it would look like: -

Field	Op	Criteria
20	X	1 JAN 91 > 1 MAR 91

For multiple OR'ing on a Text field search use "/", example: -

22 Surveyor = MD/PH/JL/RV which means find records where the surveyor field is equal to MD or PH or JL or RV.

Grouping files - these allow multiple codes to be combined into one code

e.g. the codes FB, HB, SS could be re-grouped into RP. If relevant, this will have been set-up for you by Quest prior to installation.

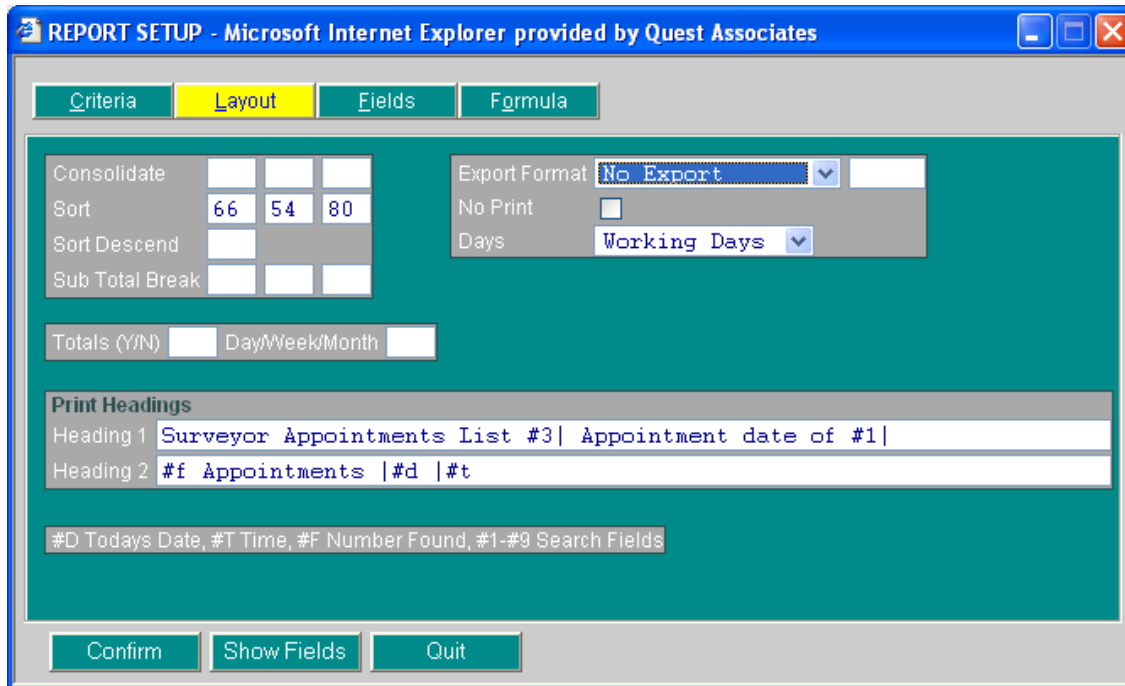


figure 59 Layout Page of a Report

This page allows you to control how the results of the search (from the previous page) are processed. Only enter information on this page if you wish to process the information. Most of these options only make sense in certain types of report, for example, you would not normally use sub-totalling in a report that had no number or money figures in it, as there would be nothing to do a sub-total of. Note that as on Page 1, when entering field numbers you can click on Show Fields if you are not sure what the field number is for a particular field e.g. Name might be field number 30. Beginners can largely ignore this page.

- 1) **Consolidation fields (up to three)** - you may enter up to 3 field numbers for consolidation. If you consolidate on a field then the computer will automatically merge all the records with the same field value into one entry, e.g. if several records are found, 4 of which have a name of SMITH and 5 of which have a name of JONES then, if you consolidated on name, instead of printing 9 entries the computer will only print 2 i.e. 1 for SMITH and 1 for JONES.
- 2) **Sort fields (up to three)** - Allows you to set up to 3 fields on which the computer will sort the results of a search prior to printing. For example, you may wish to have the results of a search printed out sorted alphabetically by name. To do this you would set the first field to the name field.
- 3) **Sort Descend** - Ascending is the default, enter Y for descending order e.g. if you sort on a money field and wanted the results printed starting with the largest amount first then you would enter Y for Yes to descending order.
- 4) **Sub total break on** - This tells the computer to print a sub-total each time the sub-total field changes. For example, if printing out records by name where there are only 3 or 4 names on say 30 records, sub-totalling would print all the records for the first name, then a sub-total, then all the records for the second name, then a sub total etc.
- 5) **Do Totals** - Perform totalling on numeric fields at the end of the printout.
- 6) **Daily Weekly Monthly Quarterly Yearly** - This only has effect if you have consolidated on a date field. Instead of consolidating on a daily basis, setting weekly, monthly etc. causes the computer to consolidate on a weekly, monthly etc. basis.

7) **Print Heading** - You can enter up to two lines of text to appear on the printout as a heading. The following can form part of the text:

- i) **#D** Today's date - and thus allows date stamping of report list
- ii) **#T** Current time
- iii) **#F** Number of records found - usefully placed at the top of a report list
- iv) **#1 to #9** the text search lines from page 1 - it is a good idea to print out the criteria the report list was based upon, especially where the text search field was prompted for.

Note: When using the enhanced print options you may put titles into separate boxes by using the " | " as a separator e.g. main heading | sub heading 1 | sub heading 2 | sub heading 3 | sub heading 4.

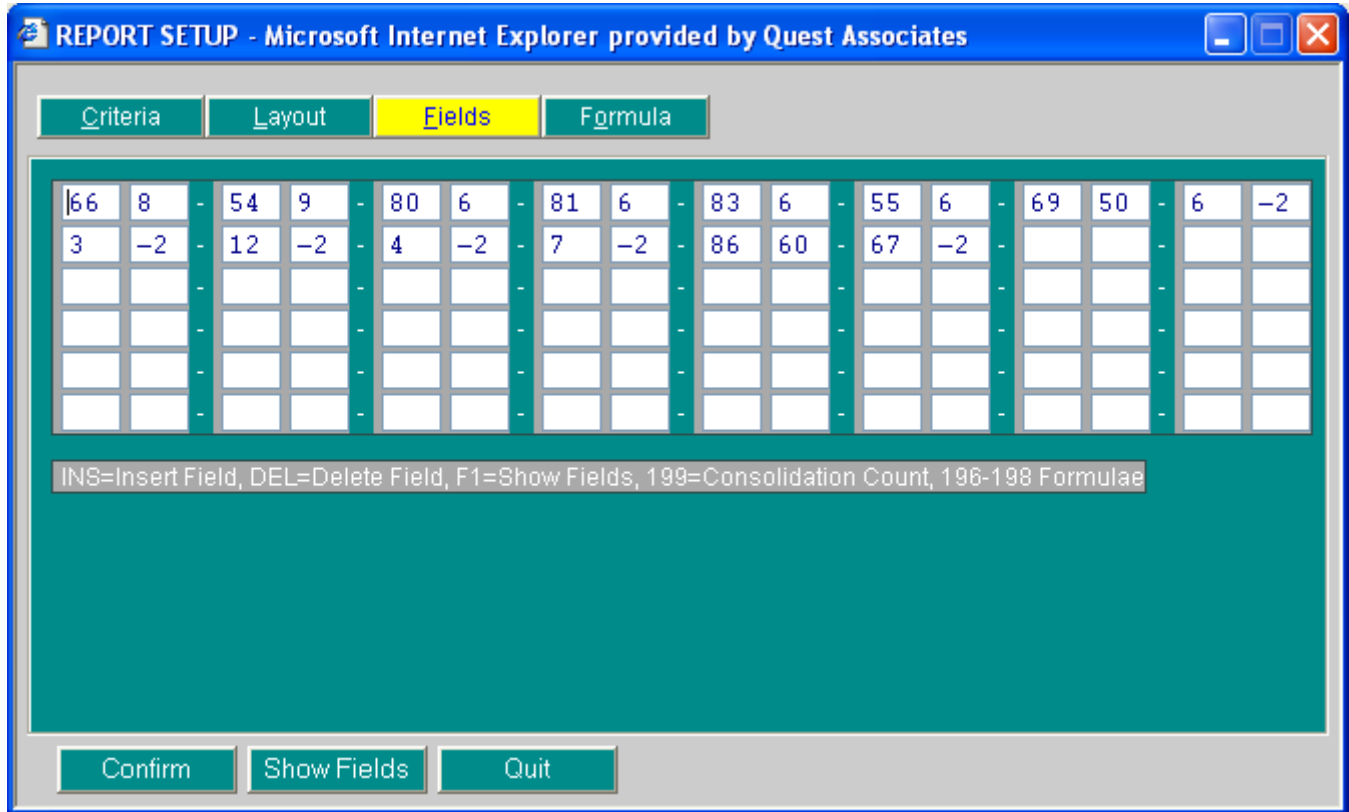


figure 60 Fields Page of a Report

This screen controls the information that is printed out. It is probably the screen you are most likely to change if you are a beginner. For each entry enter a field number (Click on Show Fields to display numbers available) and column width (e.g. 10). For each field number you enter, a column will appear on the printout, the width of the column in characters will be set to the width you enter here. Note - do not set too wide a width on too many columns, as you will go off the side of the paper! When experimenting it is best to set-up the columns and widths roughly right, click on confirm to exit, click on run to run the report and see how it looks.

Special field numbers - You may enter "special" field numbers: 199 return the consolidation count (when consolidation is used from page 2). 198 to 196 provide calculation results from formulae set on page 4.

PAGE 4 – Formula

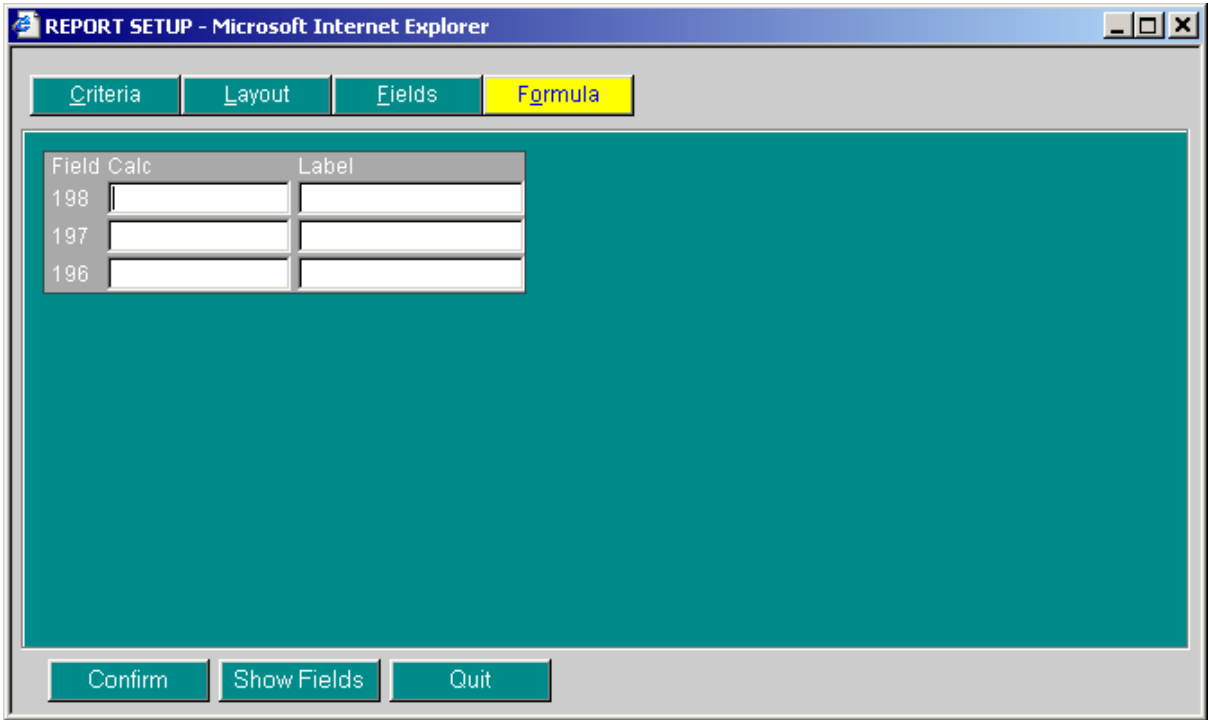


figure 61 Formula Page of a Report

Formulae fields - these allow you to perform simple calculations:-

(#+field number) (operator) (#+field number OR value)

Example:

Field	Calc	Label
198	#22*0.175	VAT CALC
197		
196		

Operators are:

- * multiply
- / divide
- + add
- subtract
- % percentage
- D date subtraction in days

NOTE: Place a "@" after the formulae if using * or / or % and consolidating the fields. This causes Q-File to perform the calculation on the sub-totals of consolidated fields rather than individual record fields, which would (normally) be erroneous.

ELECTRONIC SIGN OFF

So that the forms are sent back to the lender electronically via the SPN, the particular surveyor who undertook the survey must sign off the form.

How do I set up my E-Sign Password?

Log on to Quest DataWeb and select the option for Electronic Sign-Off.

Speak to a dedicated Quest Electronic Sign-Off operator on 01344 403400 option 5. They will talk you through the procedure.

How do I change my E-Sign Password?

Select the Electronic Sign Off option from the front Menu

Type in your Surveyor Code (i.e. 001)

In Password box type old password followed by = followed by your new password twice e.g. oldpassword=newpassword=newpassword

Click on OK to save and your new password will be confirmed.

How do I E-Sign a Valuation Report?

Ensure that your Surveyor Code has been entered in the Surveyor section of the Instruction and that the report is at stage Typed.

Select Electronic Sign-Off from the Option Menu

Enter your Surveyor Code and Password. Click OK

Your screen will now be titled Document Security Sign For: your name

Print	Edit	Code	Errors	Type	Address	Form
		<input type="text"/>	-	E-Sign	45 Bradbourne Park Road Easthampste	ZZ000016 : 2RO2
		<input type="text"/>	-	Manual	5 Training St Bracknell Berkshire R	ZZ000020 : 2HBN
		<input type="text"/>	-	Manual	75 Training Street Bracknell Berksh	ZZ000018 : 2HBN
		<input type="text"/>	-	Manual	75 Training Street Bracknell Berksh	ZZ000018 : 2VD1

Password

figure 62 Electronic Sign Off Screen

To complete the sign off for a **manual report**, you are required to put an asterisk (*) within the code box.

To complete the sign off for an **electronic report**, the code box requires the latest security print code.

To obtain this code click on the edit button and you will be taken to the report.

A Web Dialogue Box will appear, click OK.

Without making any changes to the Report, press F2 to take a copy the 'security print code'.

Click QUIT to go back to the screen titled Document Security Sign For: your name. Make sure your cursor is in the CODE box

Press F2 to paste the 'security print code' into the Code box.

With your cursor in the PASSWORD box, type in your E-Sign password and click OK

Your screen will now be titled Sign-Off Complete. Click OK and you will return to the Option Menu.

Why am I unable to E-Sign my Valuation Report?

Error - Name Invalid

The name on the report does not match the name set up for E-Sign.

The name must not contain full stops or commas.

Qualifications must be separated from the name with a comma. (i.e. A B Brown, FRICS) For any of the previous, correct the report and save the changes, then obtain the new Security Print Code.

No Forms Found for 001

Your Surveyor Code has not been entered in the booking screen of the Instruction, or

Your Valuation Report is not at stage Typed. i.e. has not been completed.

How can I E-Sign another Surveyor's Report?

It is part of the integrity of electronic sign-off that the signatory's name appears on the face of the report.

IMPORTANT NOTE

It is a matter for your own organisation to decide whether to adopt this "on behalf of" method.

The surveyor who carries out the following procedure may be assuming responsibility for the contents of the report.

Change the surveyor's name on the face of the report to the name of the person who is about to sign. This is the only change required prior to entering the "Electronic Sign Off" menu option.

Note 1: The sign-off software verifies the name on the report against the name of the password holder, but this verification checks the name only as far as any punctuation marks. Therefore, you have the opportunity to amend the report to read "new surveyor, on behalf of old surveyor", then the sign-off software will read only "new surveyor", which is prior to the comma.

Note 2: The surveyor's code on the Record Card should be left as the old surveyor.

You are now ready to enter the "Electronic Sign Off" option from the menu. Append your surveyor code with a forward slash followed by the code of the old surveyor, e.g. If surveyor 010 is signing a report on a case handled by the surveyor 020. Then surveyor 010 enters 010/020. Then enter the E-Sign password for 010.

The software will then search the database for cases belonging to the old surveyor (020) and list any reports for sign off. If any of the listed reports has a surveyor name that differs from the signing surveyor (010) then the words "Invalid Name" will appear next to it on the list.

IMPORTANT NOTICE

Lending organisations instruct a professionally qualified surveyor, and require that the surveyor vouch for the contents of the report. It is through the application of a sign off password that surveyors professionally guarantee their report.

There is sometimes a temptation for surveyors to ask their secretary to "sign" on their behalf, but pursuing this course of action is effectively forgery. Use of another person's sign-off password may constitute a criminal offence under the Computer Misuse Act and other legislation rendering you liable to criminal prosecution. It may also constitute a serious breach of your obligations of employment rendering you liable to dismissal or other disciplinary action - even if the other person gives the password to you. If you become aware of another person's password then you must immediately inform the person concerned and your head office so that the necessary steps may be taken to change the password.

UTILITIES

The Utilities option is a sub menu that gives you more options within Quest.

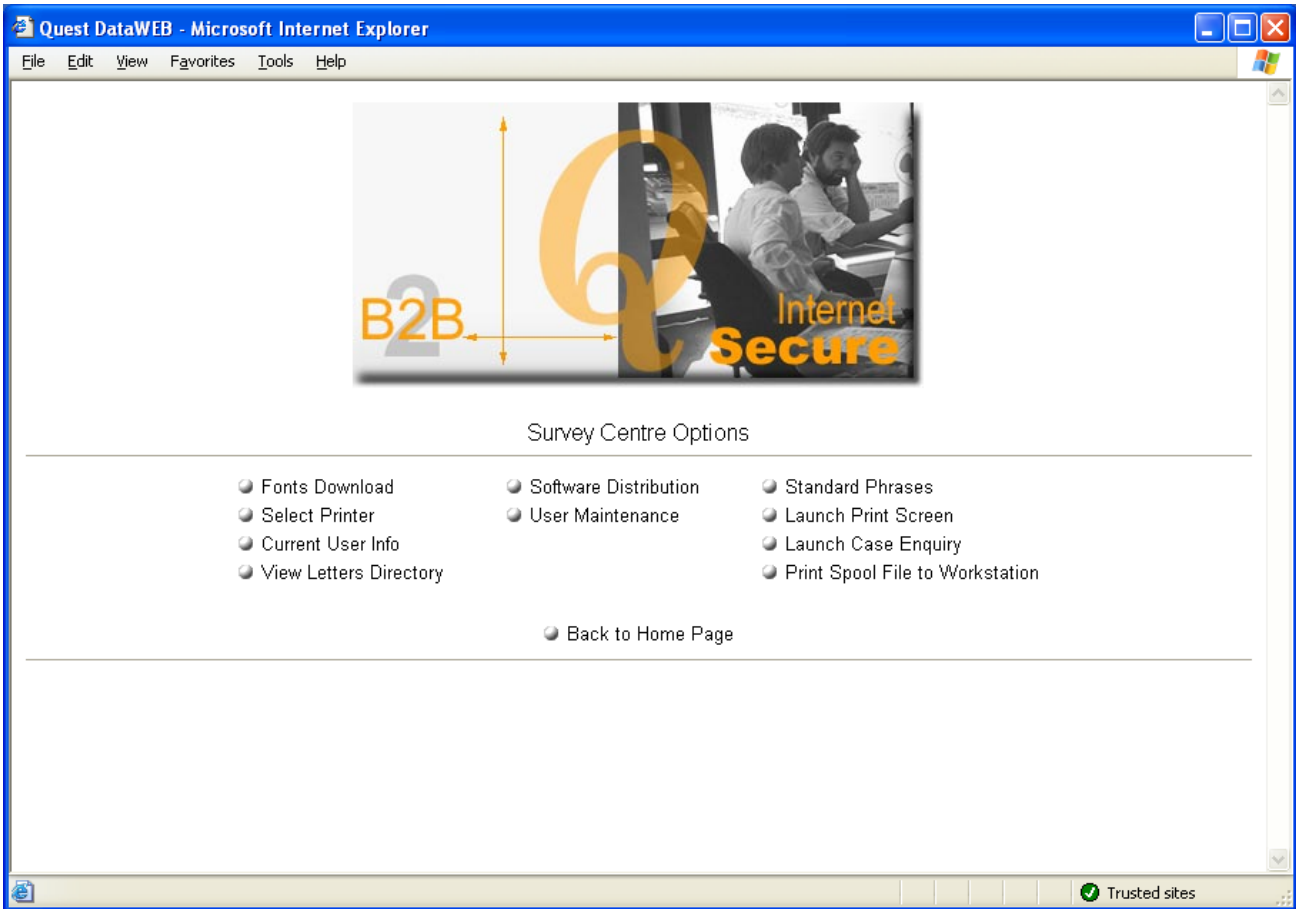


figure 63 Utilities Menu

Fonts Download

Accurate printing of lenders' report forms is a prime function of Quest Dataweb, and this is achieved, in part, by controlling the printer fonts.

Clicking on the Fonts Download button will load your printer with the correct fonts, which will stay in the printer's memory until it is switched off. Therefore, you need only download fonts once, after switching on your printer.

After the fonts have been loaded into the printer, the utility will print two alignment test sheets. If the alignment sheets show a problem, contact the support team for assistance.

IMPORTANT NOTE

IF THE PRINTER IS OUT OF ALIGNMENT, THE LENDERS REPORTS FORMS MAY NOT PRINT CORRECTLY

Select Printer

This option will allow you to select any printer that is installed on the main Quest server machine. In doing this it will remember which user prints to which printer.



figure 64 Selecting a Printer

Current Info

This displays useful information for the user and for the Quest support team

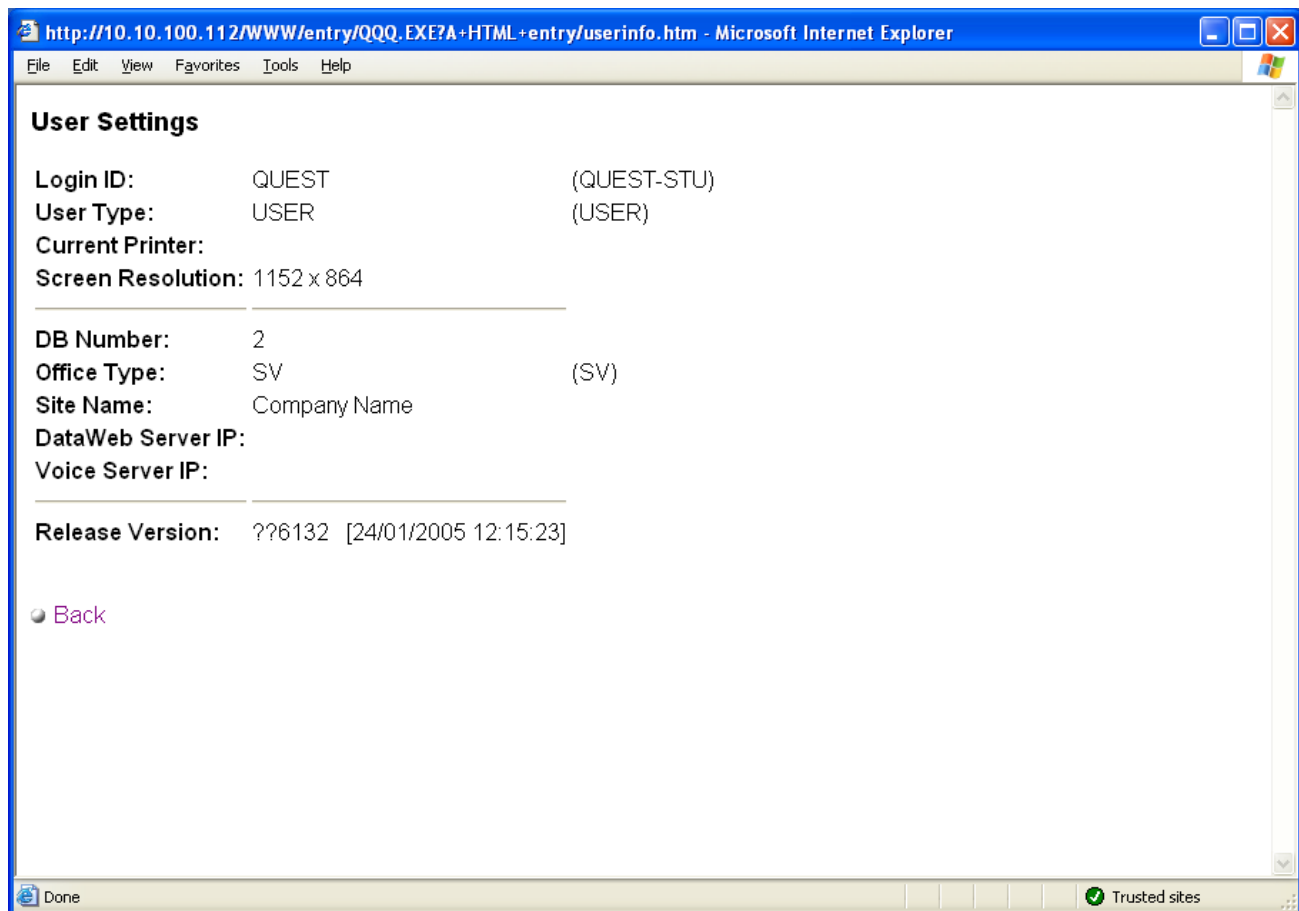


figure 65 Current Info

View Letters Directory

This will allow you to view, amend or add letters that are available to you on the system.

Software Distribution

If your system is due a software update, Quest will ask you to click on Software Distribution. This will automatically dial in to one of Quest's central systems and collect your designated updates. The updates will be installed and a memo is printed to describe the changes you have received. The most common update is to receive the latest versions of lenders report forms.

User Maintenance

User Maintenance can only be accessed by a Supervisor and is accessed from the Utilities menu. The screen you get when you click on User Maintenance is like the one below.

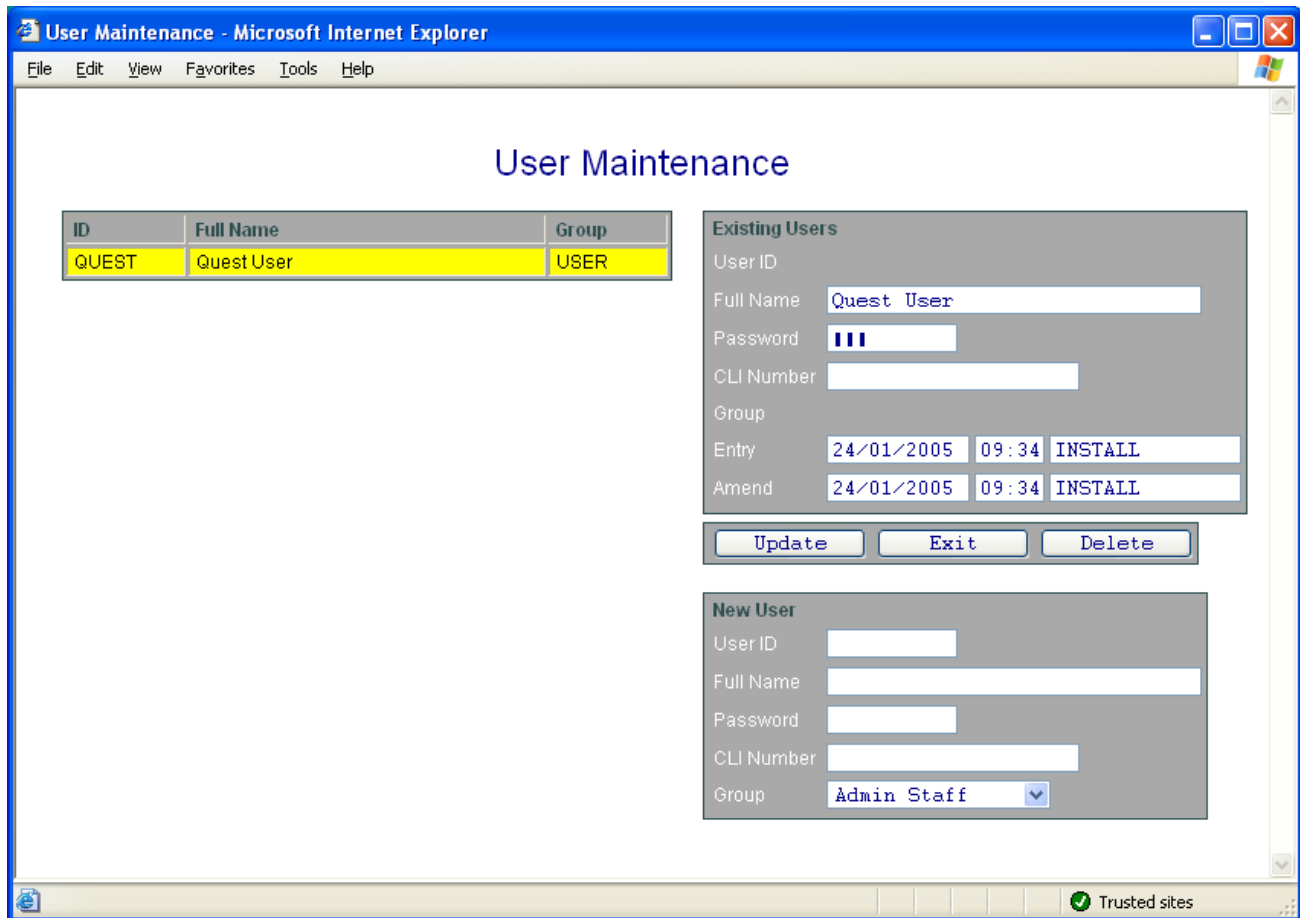


figure 66 User Maintenance

Adding a new user is very simple. Click on USERID in New section, then fill in user details, leaving the password and click add to save.

There are various groups that can be set up in User Maintenance. They are:

- 1) Admin Staff
- 2) Supervisor
- 3) Surveyor
- 4) Senior Surveyor
- 5) Read Only User

Each of the groups has different access rights to the system.

You have the option to delete users as and when is necessary.

Standard Phrases

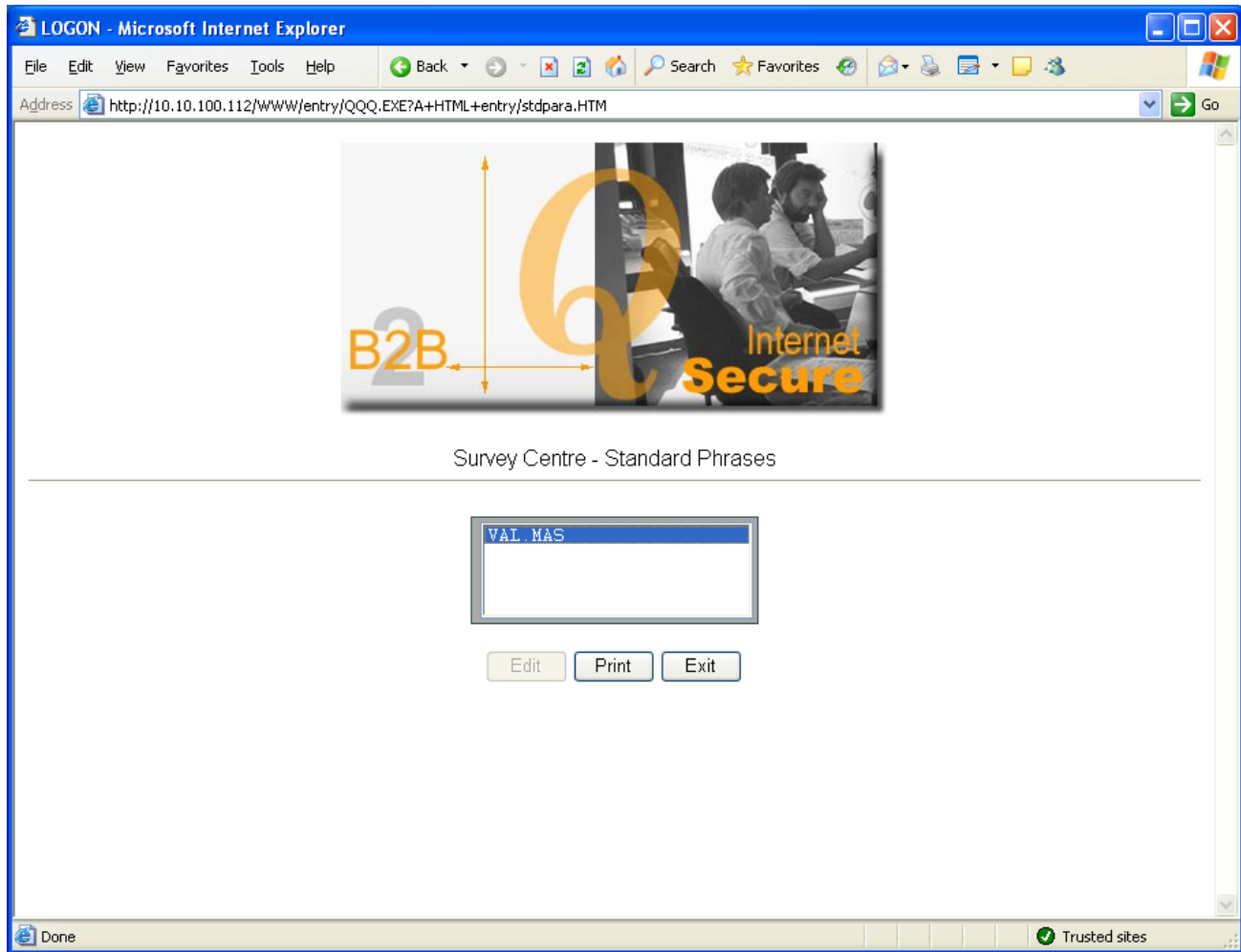


figure 67 Standard Phrases Menu

Editing Phrases

IMPORTANT NOTE

You can only edit the phrase files if you are logged in as a supervisor

To edit your paragraphs, from the Quest Front Menu select Utilities, Standard Phrases, select either Edit or Print:-

When editing phrases do not put any blank lines within a section i.e. between the A to Z phrases. Any phrases after a blank line will be ignored. However, each paragraph section must be separated by one or more blank lines, e.g.:-

- =121 [A] Typical condition for age and type, no repairs considered necessary for lending purposes.
[B] Typical condition for age and type, some repairs required <text>
[C] Typical condition for age and type, however repair is considered essential for lending purposes.
[D] This is a new property of the <text> type.
- =122 [A] these items have been reflected in the valuation provided, but the difference may not represent the true costs involved. The applicants should therefore be advised to obtain their own estimates/reports on the above prior to a legal commitment to purchase.

[B] These items have been reflected in the valuation provided, but the difference may not be represent the true costs involved. The applicants should therefore be advised to obtain their own estimates/reports on the above prior to the lender granting an advance.


Note that there are no blank lines between section 121, phrases A and B but that there is a blank line between section 121 and section 122.

Launch Case Enquiry

This will launch the Case Enquiry option that is available on the system. Using the Case Enquiry is explained on page 7.

Launch Print Screen

This option will launch a print screen option whereby you are able to take a capture of the screen that you are currently using. Once launched this option will stay available whilst the computer is still running. To use this

facility you will have a  (nut & bolt) icon that you can find in your system tray by the time. Clicking this icon will print your screen.

Print Spool File to Workstation

If at any point you have printed a document to file, this option will allow you to print that file out.

Internet Publishing

This feature allows you to publish your Homebuyers, Building Survey and Home Condition Reports to your own branded website hosted by Quest. When the instruction has been created the system will publish the initial instruction and the booking updates so that the applicant can track the progress on their report. Once the form has been electronically esigned the progress messages will disappear and the report will be display in an Adobe format on screen.

The applicant is then able to save and or print a copy of the report.

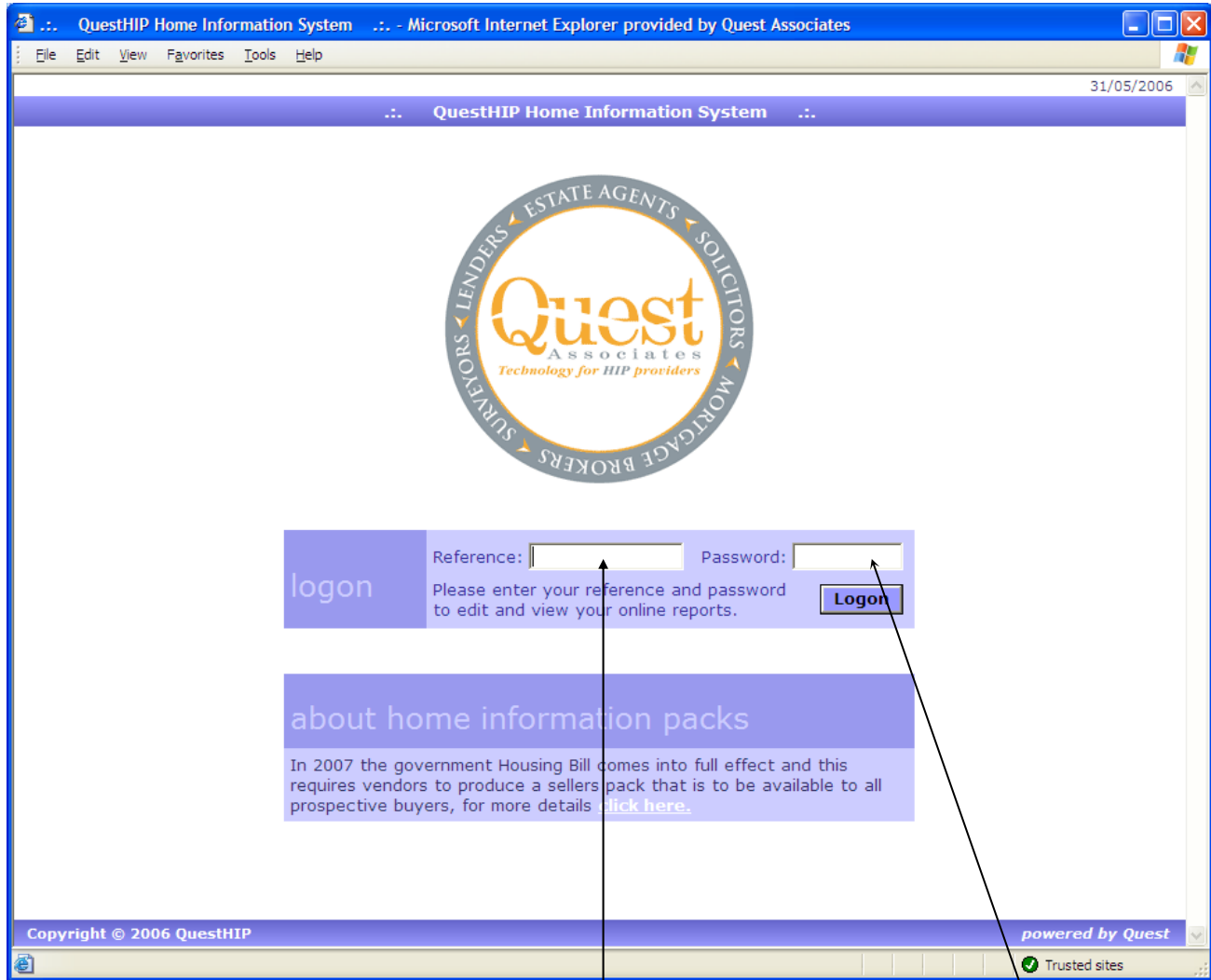


figure 68 Publishing Logon Screen

System Reference number

Unique publishing password

IMPORTANT NOTE

If a duplicate Homebuyer Report is required, you will need to re-enter a separate case on the database and re-type the Homebuyer Report.

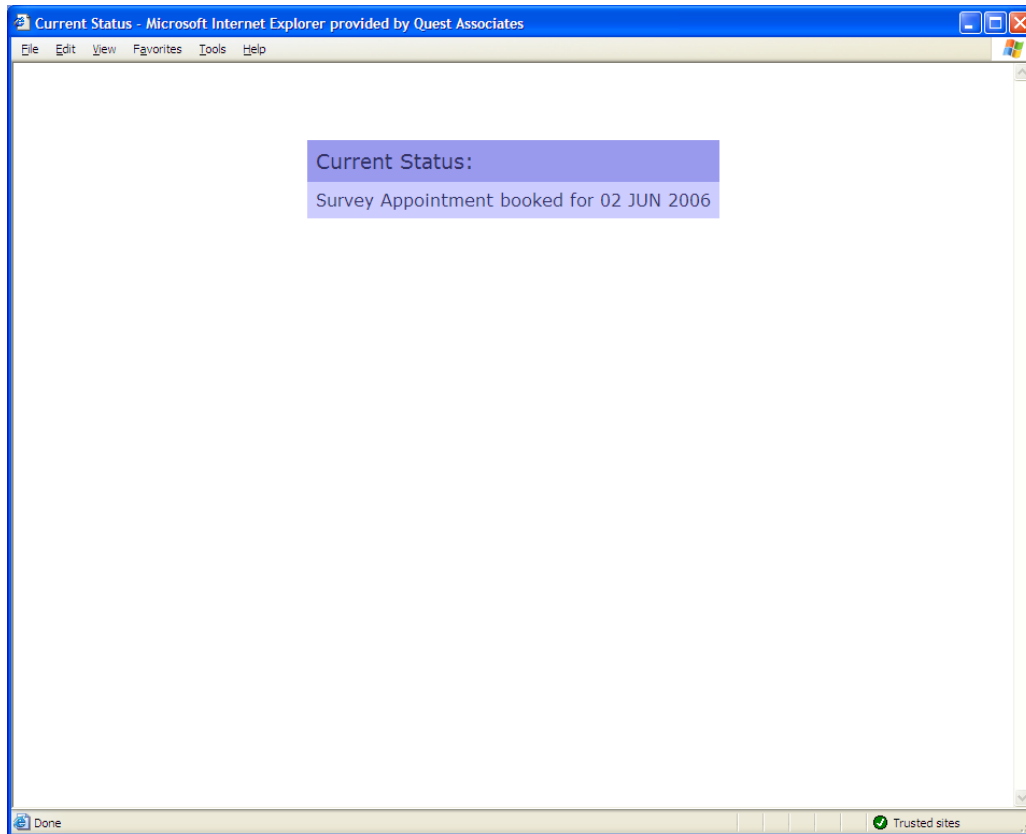


figure 69 Published Booking Status

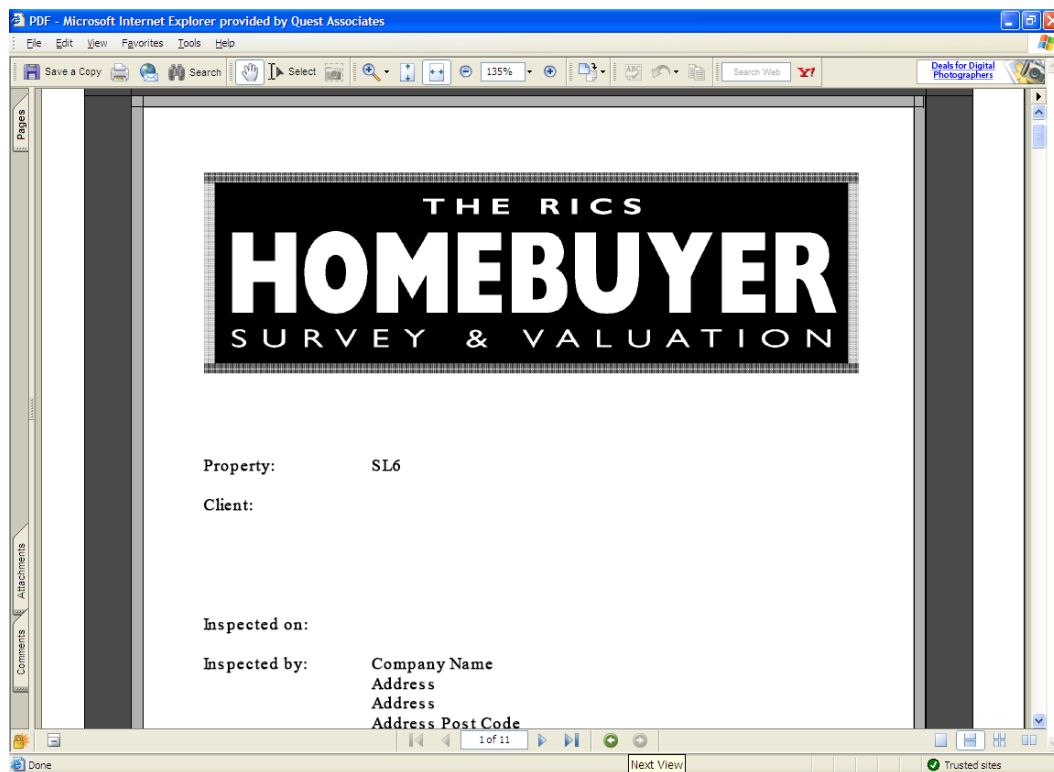
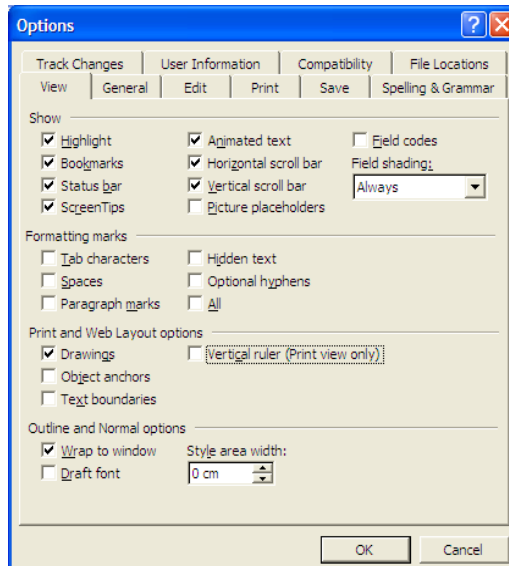


figure 70 Published Homebuyer Report

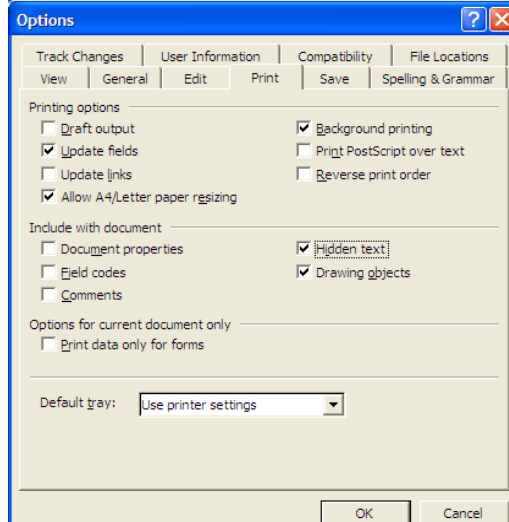
HOW TO CREATE MS WORD AUTO-FILL LETTERS

The following steps need to be carried out on each workstation within MS Word before you try to use or create letters in Quest.

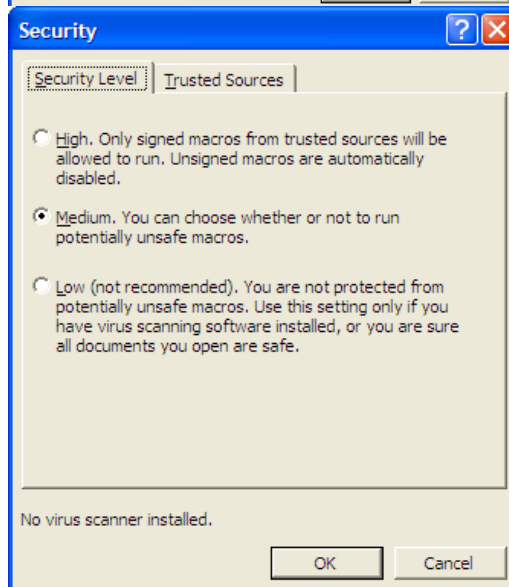
1. Open Ms Word, then click on **Tools** and select **Options...** then within the options window you need to ensure that under the view tab that show Bookmarks is ticked.



2. You will also need to ensure that under the Print Tab, you select Update Fields and Hidden Text shown in the picture to the right. Click OK.




3. Click on **Tools** then come down to Macro, across and down to security. The window on the right will then appear. You will then need to change the Security Level to Medium, then click OK

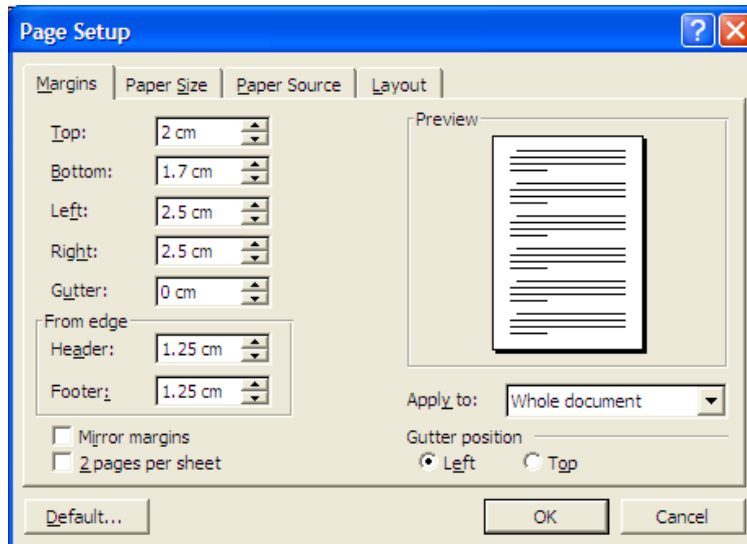


How to create a New Document Template

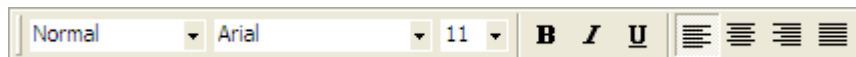
1) Click on **File** then select **New... Ctrl+N**. Another window will then appear.

2) Select **Create New** Document **Template** and then double click on  **Blank Document**

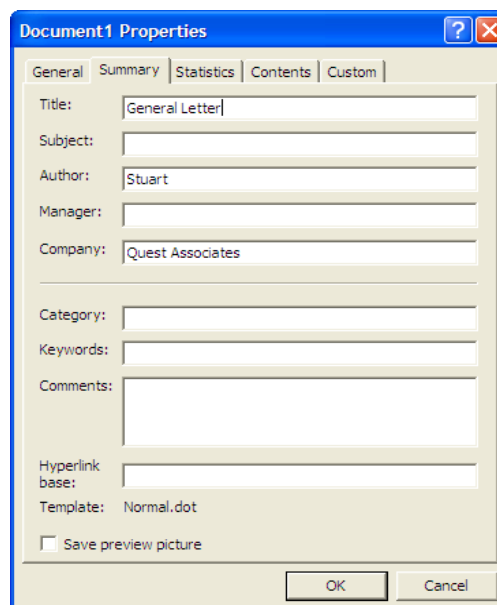
You now need to set the margins by clicking on **File** and then **Page Setup...**. The following window will then appear



3) You now need to select the font and page format in which you wish to type the letter.



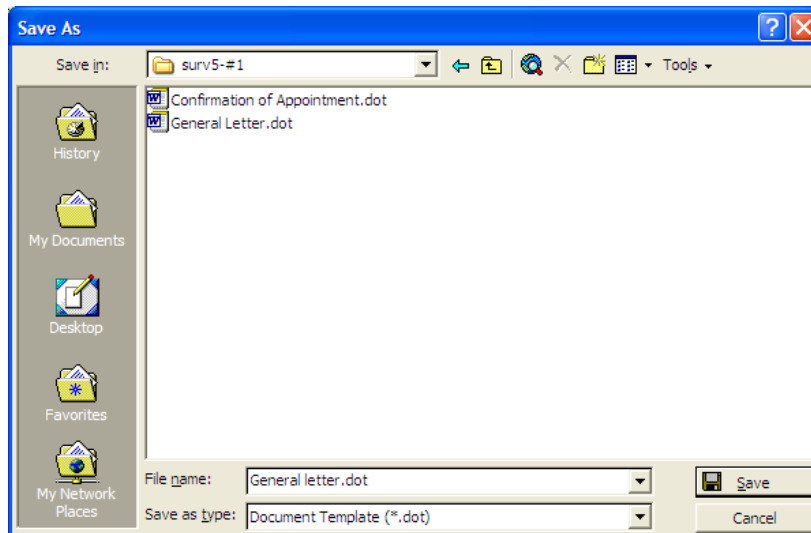
4) Once the Page layout has been set up you need to give the letter a title. To do this you must click on **File** and then **Properties** then the following window will appear.



In the box labelled Title: change the text to the title of the letter e.g. General Letter.

- 5) Next type the letter template how you want it to print. Any sections that require data to be pulled in from a Quest record will require a bookmark to be inserted in its place.
- 6) To find a list of the bookmarks that pull the data from the Quest Record Card you will need to refer to the section in this document headed Quest Bookmarks. This will help you to find the relevant field number for the information that you wish to pull in.

- 7) Once you have typed the document template, click on **File** then **Save As...** and the following window will appear



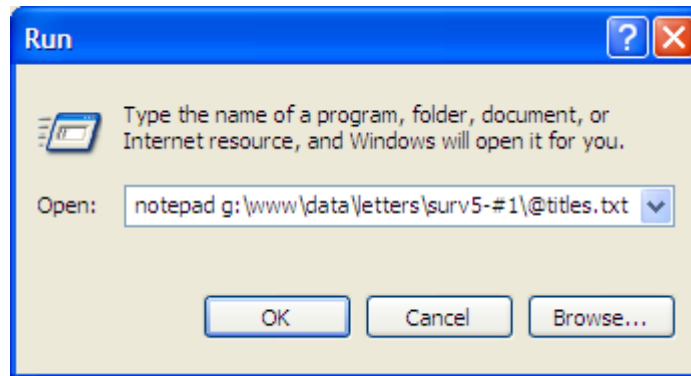
- 8) Then select Document Template in the Save as type box. Then in the Save in box select the following Folder G:\www\data\letters\surv5-#1. In the File name box type the Title of the document e.g. General Letter. Then click **Save**

Adding the Letter Title into Quest

1) To add the title of your letter into Quest you will need to edit the @titles.txt file.

2) To edit this file click on  then select  and in the window that appears you will need to type: -

Notepad G:\www\data\letters\surv5-#1\@titles.txt.



3) Then select .

4) You will then have another window appear which will contain a list of the letters that are currently set up on the system. Go to the first blank line available and type in the title of your letter, exactly as you saved it but without the file extension. e.g. General letter to Applicant.DOT will be typed as General letter to Applicant. Once you have finished adding the title click Save and close the notepad document.

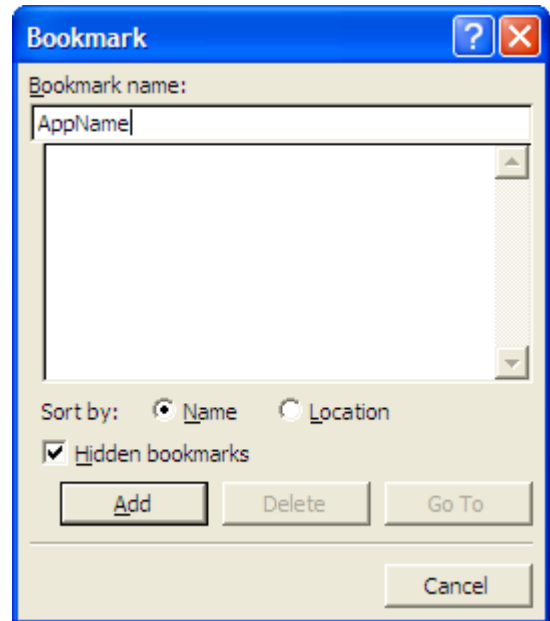
How to insert a Bookmark

1) Get to the position on the page within the Template that you wish to enter the bookmark.

2) Click on **Insert** then scroll down and click on **Bookmark...**

3) The window on the right will then appear. Within this window in the top text box you will have a cursor flashing. Type the bookmark name that you require e.g. AppName for the applicant's name.

Then click **Add**.



4) The bookmark will then appear in the document as **I**.

5) If you wish to use the same bookmark again you will need to insert Z followed by a number when adding the bookmark. e.g. AppNameZ1.

LIST OF QUEST BOOKMARKS

Record Card Position

Current Date

CurrentDate

Book Marks For Record Card Client Page

Instruction From

F113

Lender (If Different)

F75

1st Ref

F27

Client Return Address

You can use the bookmark as follows or you can use the fields below: -

This Bookmark displays the address on 5 lines: -

RetAddr1

This Bookmark displays the address in a single line: -

RetAddr2

House

F102

Road No.

F103

Road Name

F104

Area

F105

Town

F106

County

F107

Postcode

F108

Tel

F109

Fax

F110

DX

F111

Source Branch

F70

Tel

F73

Contact

F186

Tel

F187

Book Marks For Record Card Instruction Page

Type	F10
Price	F39
PP/EV	F94
Advance	F48
Scale Fee	F97
Gross Fee	F13
Fee Note	F18

Occupier Name & Address can use the bookmark as follows or you can use the fields below: -

This Bookmark displays the address on 5 lines: - **PropAddr1**

This Bookmark displays the address in a single line: - **PropAddr2**

Occupier	Title	F91
Occupier	Init	F92
Occupier	Surname	F93
House		F69
Road Number		F6
Road Name		F3
Area		F12
Town		F4
County		F5
Postcode		F7
Tel Day		F85
Tel Eve		F77
Agent		F44
Tel		F46
Access		F32
Note 1		F122
Note 2		F123
Note 3		F124

Book Marks For Record Card Applicant Page

You can use the bookmark as follows or you can use the fields below: -

Applicant Title 1	AppName
Applicant Init 1	F37
Applicant Surname	F38
Applicant Title 2	F100
Applicant Init 2	F57
Applicant Surname 2	F58
Internet Publishing Password	F101
	F11

You can use the bookmark as follows or you can use the fields below: -

This Bookmark displays the address on 5 lines: - AppAddr1

This Bookmark displays the address in a single line: - AppAddr2

House	F20
Road Number	F21
Road Name	F22
Area	F23
Town	F24
County	F25
Postcode	F26
Tel Day	F74
Tel Eve	F79
EMOK	F189

Book Marks For Record Card Surveyors Page

Surveyors Code	F66
Appointment Date	F54
Status	F65
Delay	F84
Time 1	F80
Time 2	F81
Excluding	F83
ETA	F55
Appointment Note 1	F86
Appointment Note 2	F67
Surveyors Name	F130
House	F131
Road Number	F132
Road Name	F133
Area	F134
Town	F135
County	F136
Postcode	F137
Tel	F138
Fax	F139
Cost Centre	F141
Surveyors Qualifications	F142
Office Code	F140
Panel Allocation	F179

Book Marks For Record Card Admin/Status Page

Administration Note 1	F148
Administration Note 2	F31
Administration Note 3	F33
Administration Note 4	F35
Administration Note 5	F36
Administration Note 6	F169
Status Note 1	F165
Status Note 2	F166
Status Note 3	F167
Status Note 4	F168
Status Note 5	F117
Status Note 6	F118
Status Note 7	F119
Defect Notes 1	F115
Defect Notes 2	F116

Book Marks For Record Card Comparables Page

Typed By	F19
Report Date	F120
Report Time	F121
Property Type 1	F34
Property Type 2	F76
Tenure	F43
Unexp	F29
Rent	F30
Year Built	F49
Condition	F68
Living	F52
Beds	F51
Baths	F56
Conservatory	F47
SAP	F188
Floor Area	F82
Central Heating	F95
Cloak Rooms	F87
Floors	F71
Utility	F53
Garage	F72
Val Present	F125
Val After Work	F127
Inspection Date	F41
Price PSM	F128
Building Insurance	F126
Sale (Y/N)	F64
Notes 1	F60
Notes 2	F61
Notes 3	F62
Notes 4	F63

Book Marks For Record Card Invoicing Page

Invoice Details 1	F16
Invoice Details 2	F17
Invoice Address 1	F192
Invoice Address 2	F193
Invoice Address 3	F194
Invoice Address 4	F195
Payment Amount	F170
Due Date	F129
Payment Date	F176
Cheque/Card No.	F172
Net Fee	F96
Net Vat	F88
Disb	F154
Disb Vat	F159
Gross Fee	F13
Invoice Number	F145
Invoice Date	F146
Completed Date	F14
Credit	F149
X-Ref	F147

Book Marks For Record Card Miscellaneous Page

Entry Date	F8
Entry Time	F2
Entry By	F162
SysRef	F15
Staff	F40
Update Date	F9
Ctrl	F99
Update By	F163
Cascade	F50
Sub Panel Code	F98
Appointment Set 1	F150
Appointment Set 2	F151
Forms	F78
Errors	F42
InvAdmin1	F112
InvAdmin2	F114
Client Requirements 1	F155
Client Requirements 2	F156
Client Requirements 3	F157
Client Requirements 4	F158
In SPN ID	F28
Out SPN ID	F178
Control	F90
Site Address – Quest.ini	SiteAddr
Site Name – Quest.ini	SiteName