



# Using File Lister

This document provides instructions for using File Lister to quickly view order information for appraisal files at-a-glance.

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# File Lister

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File Lister is a listing of all files created using Report and updated with corresponding orders in Track. File Lister provides a quick and easy way to view the order information for appraisal files. File Lister utilizes canned and user-defined View and Search Schemes to organize the displayed list.

## Integration Options

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Set the Report-to-Track integration options under Environment Options in the Report program. Integration options control updates to the Track database when saving and closing reports.

### Setting Integration Options

1. Open the Report program.
2. Click **Options > Environment > Integration**.

#### ***Database***

##### *Update order database on close*

Selecting this option automatically updates the Track database when closing a report. This option is selected by default.

##### *Only if the report file has been modified*

Selecting this option updates the Track database only when the report has been modified. This option is selected by default.

##### *Always create appraiser if one does not exist*

Selecting this option automatically creates an appraiser record in Track if the appraiser is not found in the database.

**NOTE:** If this option is deselected, the Report program prompts for adding the appraiser to the database when saving and closing reports.

##### *Always create client if one does not exist*

Selecting this option automatically creates a client record in Track if the client is not found in the database.


**NOTE:** If this option is deselected, the Report program prompts for adding the client to the database when saving and closing reports.

**TIP:** Selecting an appraiser and a client when creating the Track Order allows Report and Track to recognize existing appraisers and clients.

3. Click **OK** to exit *Environment Options*.

## Using File Lister in Report


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1. Click **File > File Lister**, or click the **File Lister** icon () , or press **CTRL+SHIFT+O** on the keyboard.
2. Use the *View* and *Search Schemes* to filter the list (optional). Select a report and double-click it to open the file, or click **Close** to exit File Lister without opening a report.


**TIP:** Enter specific criteria, for example *Client File Number*, in the *Find* field to locate a report. The *Find* criteria changes with the selected *View Scheme*

## Opening Orders in Track

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1. Click **File > Open Order** or click the **Open Order** icon () , or press **CTRL+O** on the keyboard.
2. Use the *View* and *Search Schemes* to filter the list (optional).

**TIP:** Enter specific criteria, for example *File Number*, in the *Find* field to locate an order. The *Find* criteria changes with the selected *View Scheme*.

3. Double-click an order or click **Open** icon () .

## Printing from File Lister

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1. Click **File > File Lister**, or click the **File Lister** icon () , or press **CTRL+SHIFT+O** on the keyboard.
2. Select a file and click **Print** () .
3. Select the *Print Option* and click **OK**.

### **Report**

Prints the report file.

### **Order**

Prints the Order only.



### **Invoice**

Prints the Invoice only.

## Copying Files in File Lister

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Use the *Copy* feature in File Lister to copy report files to a specified location.

1. Click **File > File Lister**, or click the **File Lister** icon () , or press **CTRL+SHIFT+O** on the keyboard.
2. Select a file and click **Copy** () .
3. Browse to the destination folder and click **OK**.
4. Click **Yes** to copy the selected file(s), or click **No** to cancel.

## Importing Files in File Lister


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Use the *Import* feature in File Lister to import reports from other locations to the Reports folder. The Track database updates with the imported file.

1. Click **File > File Lister**, or click the **File Lister** icon () , or press **CTRL+SHIFT+O** on the keyboard.
2. Click the **Import** () .
3. Browse to the file, select the file to import, and click **Open**. Track updates and the report imports to the Reports folder.

## Deleting Files in File Lister

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1. Click **File > File Lister**, or click the **File Lister** icon () , or press **CTRL+SHIFT+O** on the keyboard.
2. Select a file and click **Delete** () .

**TIP:** To select multiple records, press the **CTRL** or **SHIFT** key on the keyboard while clicking the files with the mouse.

3. Select the item to delete and click **Yes** to delete the file, or click **No** to move to the next file selected for deletion. Click **Yes All** to delete all files selected for deletion.

### **Track Record**

Deletes the Track record only. The Report file remains.

### **Report File**

Deletes the Report file only. The Track record remains.



### **Both**

Deletes both the Track record and the Report file.

## Sending Reports from File Lister

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Use File Lister to deliver reports to clients via e-mail. MAPI-compliant e-mail program required. ACI supports MAPI-compliant e-mail programs like Microsoft® Outlook and Eudora®.

1. Click **File > File Lister**, or click the **File Lister** icon () , or press **CTRL+SHIFT+O** on the keyboard.
2. Select a file and click **Send** () .
3. Select the *Order*, the *Status*, or the *Report*, and click **OK**.

### **Order**

Sends the Order only.

### **Status**

Sends an update on the Order only. Enter desired text in the subject line and body of the e-mail.

### **Report**



Sends the report file.

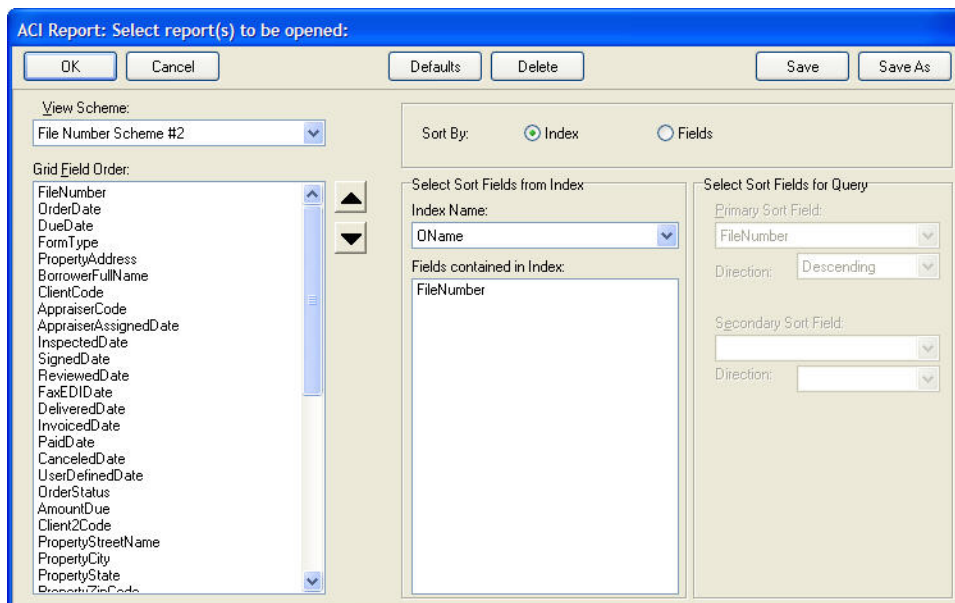
4. Check *Send to Client* or *Send to Other*, and click **Next**.
5. If prompted, select the *Profile* and *Service* and click **Next**.



6. If prompted, enter the e-mail address of the recipient. Enter the desired text in the subject line and body of the e-mail, and click **Send**.
7. A send confirmation is returned. Click **OK**.
8. Click **Send / Receive** in the e-mail program to complete delivery.

## Customizing View Schemes

View Schemes help organize the information in File Lister. Use View Schemes to create custom on-screen displays of fields in a specific order. Creating or modifying a View Scheme sorts the on-screen display without hiding or filtering data. File Lister includes preset View Schemes that can be modified.

1. Click **File > File Lister**, or click the **File Lister** icon () , or press **CTRL+SHIFT+O** on the keyboard.
2. Click the **Setup View Scheme** icon () to the right of the *View* menu.
3. Select a *View Scheme*. By default, the last selected View Scheme is displayed.



4. Arrange fields in the *Grid Field Order* section. Select a field and drag it to the preferred location, or click the **Up** () and **Down** () arrows to move the selected field in the list.
5. Select the *Sort By*: method.

### **Index**

Sorts using a pre-defined indexing method.

### **Fields**

Sorts by selected grid fields.

6. Click action.

**OK**

Applies View Scheme settings immediately (one-time view).

**Cancel**

Returns to the previous screen. Changes are not applied.

**Defaults**

Restores the default settings for the selected View Scheme.

**Delete**

Removes the selected View Scheme.

**Save**

Saves the current settings to the selected View Scheme name.


**Save As**

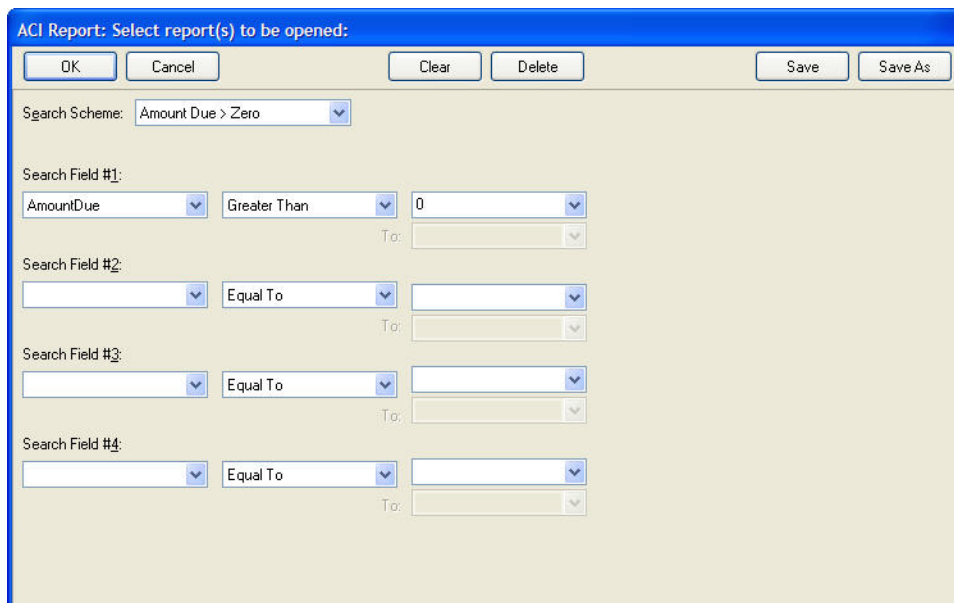
Saves the current settings as a new View Scheme.

## Customizing Search Schemes

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Search Schemes filter information in File Lister. Use Search Schemes to query the data, and File Lister displays the records that match the search criteria.

1. Click **File > File Lister**, or click the **File Lister** icon () , or press **CTRL+SHIFT+O** on the keyboard.
2. Click the **Setup Search Scheme** icon () to the right of the *Search* menu.



ACI Report: Select report(s) to be opened:

OK Cancel Clear Delete Save Save As

Search Scheme: Amount Due > Zero

Search Field #1:  
AmountDue Greater Than 0  
To:

Search Field #2:  
Equal To  
To:

Search Field #3:  
Equal To  
To:

Search Field #4:  
Equal To  
To:

3. Enter up to four search parameters. Select the *Field*, the *Condition*, and the *Criteria*.

**Field**

Select the field to search e.g., File Number, Property Address, Due Date.

**Condition**

Select the condition for finding the criteria e.g., Equal To, Less Than or Equal To, Greater Than.

**Criteria**

Enter the criteria for the search e.g., 87270008, 123 Main Street, 7/25/2008. The *To:* field is enabled when the selected Condition is *From*.

4. Click action.

**OK**

Applies the Search Scheme settings immediately (one-time search).

**Cancel**

Returns to the previous screen.

**Clear**

Clears the current Search Scheme settings.

**Delete**

Removes the selected Search Scheme from the Search Scheme list.

**Save**

Saves the current settings to the selected Search Scheme name.

**Save As**

Saves the current settings as a new Search Scheme.

## Database Archiving

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The Archive feature is used to move records from the main Order database to the Archive database. Archive can be used to move closed files (billing completed) and older files out of the main database to increase response time in a large database. Archived orders are searchable and viewable in the Archive database. If an archived order is needed, the UnArchive feature copies the archived file back to the main Order database.


### Archiving Records

1. Click **File > File Lister**, or click the **File Lister** icon () , or press **CTRL+SHIFT+O** on the keyboard.
2. Select the order to archive.

**TIP:** To select multiple records, press the **CTRL** key on the keyboard while clicking the orders with the mouse.

3. Click **Tools > Archive > Database**. Files are archived.

### Viewing Archived Records

1. Click **File > File Lister**, or click the **File Lister** icon () , or press **CTRL+SHIFT+O** on the keyboard.
2. Click **Tools > UnArchive > Database**.
3. Use the *View* and *Search* schemes to filter the list (optional).

**TIP:** Enter the specified criteria, for example FileNumber, in the *Find* field to locate an order. For additional information see *Customizing View Schemes* and *Customizing Search Schemes*.

### Unarchiving Records

1. Click **File > File Lister**, or click the **File Lister** icon () , or press **CTRL+SHIFT+O** on the keyboard.
2. Click **Tools > UnArchive > Database**.

3. Select the order to unarchive.

**TIP:** To select multiple records, press the **CTRL** key on the keyboard while clicking the orders with the mouse.

4. Click OK to unarchive, or click Cancel to return to the previous screen.

**NOTE:** An archived copy of the record remains in the Archive database after the file is unarchived.

## Track File Lister Options

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1. Click **Setup > Options > FileLister**.
2. Select preferences and click **OK**.

### ***Use Stand Alone File Lister***

When selected, File Lister runs as a separate application when accessed from Track. File Lister remains open after each action i.e., open order, order search. This feature increases response time in large databases.

### ***Enable Report Lock File Checking***

When selected, report files in use are highlighted on the File Lister screen providing a quick visual as to which files are open on the network. This feature decreases response time in large databases.

### ***Display File Size with Filename***

When selected, file size displays with the filename in the *DOS Filename* field in File Lister. This feature decreases response time in large databases.

**NOTE:** ACI recommends deselecting this option on large databases to increase response time.