# Electronic Recording System Systems Administration Manual

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## Installing ERS:

Place the Electronic Recording System CD into your CD ROM drive. Click on the Windows Start Button. Click on Run.

Enter *CD-ROM drive letter:*setup.exe; (Example: D:setup.exe) and press enter. This will start the installation program as shown;

Setup		×
	Welcome to Electronic Recording System Setup	
	This program will install Electronic Recording System on your computer. It is strongly recommended that you exit all Windows programs before running this Setup program.	
	[ <u>N</u> ext>] Cancel	

Press the <u>Next</u> button to continue or press Cancel to exit.

Pressing Next will allow you to pick where you want the system installed;

Setup 🛛
Choose Destination Select folder where Setup will install files.
Setup will install Electronic Recording System in the following folder.
To install to this folder, click Next. To install to a different folder, click Browse and select another folder.
Destination Folder
C.\\Electronic Recording System Browse
InstallShield
< <u>B</u> ack Cancel

You can change the destination folder but we recommend that you leave it a the default.

Press the <u>N</u>ext button to continue, <u>B</u>ack to go back to the previous screen or Cancel to exit the installation.

Press Next will allow you to choose the type of installation;

Setup	×
Setup Type Choose the setup type that best suits your needs.	1
Click the type of Setup you prefer.	
Full Monitor Server Installation Workstation	<ul> <li>Description</li> <li>This will Install all the files necessary for Server, Workstation and Monitor functions.</li> </ul>
InstallShield	ck <u>N</u> ext≻ Cancel

Full Monitor Server Installation Workstation Installs the ERS database, scanning programs, monitor programs. Only installs the monitor components. Only installs the ERS database. It does not install any programs. Installs the ERS (Scanning program) on a workstation.

Select the type of installation and press the <u>N</u>ext button to continue or <u>B</u>ack to go back to the previous screen or Cancel to exit the installation.

Setup	×
Electronic Recording	
Please specify the path to the Ers database.	
Path	
Install9hield	< <u>B</u> ack <u>N</u> ext > Cancel

Pressing Next will now ask you for the path to the ERS database;

If you are doing a **Full or Server** installation the install program will create the directories and install the database for you.

If you have selected any other type of installation then you must enter a valid path to the ERS database that you previously installed.

Press the <u>Next</u> button to continue, <u>Back</u> to go back to the previous screen or Cancel to exit the installation.

Pressing Next will show you what options you have selected.

Setup	×
Start Copying Files Review settings before copying files.	1
Program Location: C:\Program Files\Digital Solutions, In	c\Electronic Recording System
Current Settings:	
Installation Type: Full Database Path: s:\ers Program Location: C:\Program Files\Digital Solutions, Ir	ic\Electronic Recording System
1	<u>•</u>
InstallShield	
< <u>B</u> a	ick <u>N</u> ext> Cancel

If the options are correct you can press

Press the <u>N</u>ext button to continue, <u>B</u>ack to go back to the previous screen or Cancel to exit the installation.

Pressing <u>Next</u> will start the installation, when finished the following will be displayed.

Setup		
	Setup Complete	
	Setup has finished installing Electronic Recording System on your computer.	
	Click Finish to complete Setup.	
	< Back	

Press Finish and your done.

### Electronic Recording Administration Manual

When you look at your Windows Desktop you will notice that one or more of the following icons have been added;



This is for the scanning of documents

Electronic Recordi...



This program prints copies of the recorded documents, prints the labels and emails the escrow officer when the file has been recorded.



Copy ERS

This program copies the documents to the County Recorders Office and retrieves the recorded documents from the County Recorders Office.

## System Configuration:

The system configuration options are accessible from each module. For this manual we will use the Electronic Recording System scanning program to access the options.

Locate the scanning Icon and double click it to start.

Now enter your user name and password. Note: if you don't have system administration rights you won't be able to look at the system options.

From the desktop you call either select <u>T</u>ools,<u>O</u>ptions or you can click on the 😍 button on the tool bar. This will display the options screen as follows;

🛨 Options		×
Company Code:		Options
County Share Name:	s:	🔽 Email EO When Sent
County User Name:		Email EO When Recorded
County Password:		<ul> <li>Attach Recorded Docs</li> <li>Email Error Notifications</li> </ul>
Temporary Directory:	F:\scanning\temporary\	Email Addresses:
Impact Directory:		
Send Drive:	f:	
Sleep Interval (Secs)	10	Move Recorded Docs to Storage
Log File Location:	f:\scanning	🔽 Email Reject Notifications
Scan Images as:	CCITT Group4_2d_fax	☑ Print Hard Copy of Docs Confirmed
Confirmation Path:	s:\scanning\confirmation\	✓ Print Labels
Error Path:	s:\scanning\	In Directory Names for Months zero fill
Doc Storage Path:	s:\scanning\storage\	☑ In Directory Names for Days zero fill
Reject Path:	s:\scanning\rejects\	Purge Recorded documents from ERS
Compact Database at:	12:22 PM	Cancel <u>O</u> K

Each of the above options is explained below;

Company Code	This is the name that the County Recorders Office has given you. If you don't know what it is please contact the county recorders office.
County Share Name	This can be either the full server name of the Counties server, example: \\MaricopyCounty.gov or it is a drive letter that you have already mapped to the County Recorders Office. We recommend that you use mapped drives rather than the server name.
County User Name	If you are using the server name above, then you need to specify your user name. This is the name that the County Recorders Office has given you.

Electronic Recording Administration Manual			
County Password	This is the password to the County Recorders Office.		
Temporary Directory	This is a directory that is used by the ERS modules for temporary storage. We recommend leaving at its default location.		
Impact Directory	If you are integrating with Impact the this is the full path name to the Impact data folder on the Impact server. If you are not integrating with Impact this <b>must</b> be left blank.		
Send Drive			
Sleep Interval	This is the number of seconds that the Monitor and Copy programs are to be idle before checking for additional items. This should nominally be between 300 to 3000 (5 minutes to 10 minutes).		
Log file location	This is where the ERS programs will keep their log files. It is recommended that you leave it at the default.		
Scan images as	This specifies what type of resolution is to be done the scanned images. Currently Maricopa County Recorders Office is using the CCITT Group4_2d_Fax. Do not change this unless told to do so by the County Recorders Office. Changing this could result in your documents being rejected.		
Confirmation Path	This is the location where the recorded documents will be put until they are printed by the Monitor Program. We recommend that you leave this at the default.		
Error Path	This is the location that the ERS programs will use for their error logs. It is recommended that you leave this at the default location.		
Doc Storage path	This is the location that the ERS will store the recorded documents in. You can make this what ever location you wish so long as the Monitor Program can access it.		
Reject Path	This is the location where the Copy ERS program will place any files rejected by the County Recorders Office. <i>Note: if the system is configured to email reject notifications once the email has been sent the file is deleted from this folder.</i>		
Compact Database at	This is the time when the system can do database maintenance. This time should be set to be outside of normal business hours. <i>Note: do not leave this blank, doing so will disable the database maintenance and could result in the database becoming corrupted or of running out of storage space.</i>		
Move recorded docs t	Move recorded docs to storage Check this if you wish to retain the recorded documents for use in an imaging system		
Print hard copy of do	<b>cs confirmed</b> Check this to have the system automatically print copies of the recorded documents.		
Print Labels	Check this to have the system print labels. <i>Note: you must have a dot matrix printer attached to computer running the monitor program.</i> The printer should be called "Labels".		
In directory names fo	r months zero fill		

In directory names for months zero fill In directory names for days zero fill

## Electronic Recording Administration Manual

## DO NOT CHANGE THE ABOVE TWO OPTIONS.

## **Purge Recorded Documents from ERS**

Check this to have the system delete documents from the ERS database when they are recorded. This is recommended to keep the database of a manageable size.

The following options concern email functions, if you do not have email do NOT check any of the options.

Email EO when sent	Check this If you would like to have the system notify the escrow officer when their file has been sent to the Recorders office.
Email EO when recorded	Check this if you would like to have the system notify the escrow officer when their file has recorded.
Attach recorded docs	If you have checked the Email EO when recorded option you can have this option of attaching the actual recorded documents to their email. ( <i>Note: in order for the escrow officer to be able to see or print a recorded</i> <i>document they must have Windows imaging installed on their system.</i> )
Email error notifications	Check this to have the system to notify you when an error has occurred in the Copy ERS or Monitor ERS functions. If you checked this than you can supply up to two email addresses to have the notifications sent to.
Email Reject notifications	Check this to have the system email the person who scanned the document when the county has rejected it.

## License Manager:

To access the License Manger so that you can add additional workstations login to the ERS scanning program and select <u>T</u>ools; <u>L</u>icense Manager. *Note: you must be login in to ERS with administrator access.* 

🔒 End User Licen	se Manager		×
Company Informatio	n		License Information:
Name:	Digital Solutions, Inc.		Serial Number:
Contact Name:	Darel DaVee		Number of Users: 1
Address #1:			Purchase Date: 10/25/1998
Address #2:			
City, State and Zip:			Purchase
Phone Number:			
	cation		
Workgroup	Workstation		Workgroup:
DSIPHX	DARELDAV	Add	
		<u>D</u> elete	Workstation:
		<u>M</u> odify	<u>C</u> ancel <u>O</u> K
P	lint		<u>C</u> ancel <u>D</u> K

Your company information should have been filled out when the ERS system was first installed but now is a good time to check it and make any corrections needed.

If you have already setup the number of workstations that you are licensed for then you will need to purchase additional licenses. To do this Press the <u>P</u>urchase button and this will display the following;

🛄 End User License Manager	×
Digital Solutions, Inc. 440 S. Williams Blvd. Tucson, AZ 85711	Phone: 520-747-2277 Fax: 520-747-0774 Email: support@digisolaz.com
Phone: 520-747-2277 Fax: 520-747-0774 Email: support@digisolaz.com	
In order to use the software, you must: 1. Enter the total number of user-author 2. Provide Digital Solutions with the 'se 3. Enter the Encryption Code after obter	eed' value shown below.
Total Number of User-authorizations	Eroceed
Seed Value En	cryption Code E <u>x</u> it

Next enter the number of User-Authorizations you would like and press TAB.

Now you will need to call Digital Solutions at the number listed on the screen and tell them you need to get licenses for ERS, they will ask you for the Seed Value which is the number in the lower left hand corner of the screen. DSI will then give you an Encryption Code, enter it in the Encryption Code field, make sure that you enter it exactly has they have given it to you. Now press <u>P</u>roceed. The system will then added the requested number of User-Authorizations to your total license count so you can now add new stations.

For each station that you will be adding you will do the following steps;

- Press the <u>A</u>dd button.
- Enter the workgroup name (If you have workgroups setup on your network you MUST enter the workgroup name)
- Enter the workstation name, this is the name of the computer which is defined under the control panel; network; identification.
- Now press <u>O</u>K. You will notice that the name now appears on the left hand side under the workstation identification section.

Once you have entered all the stations then you can press the <u>O</u>K button at the lower right of the screen.

#### Password Maintenance:

Login to the ERS scanning program and select <u>T</u>ools; <u>P</u>asswords. *Note: you must be logged in to ERS with administrator access.* 

💾 Passwords	×
Darel DaVee Debbie Willis Steve Wilks	<u>C</u> ancel <u>N</u> ew <u>M</u> odify
	<u>P</u> rint Delete

You have the following options;

- **Cancel** Cancels the password screen and returns you to the desktop
- New Setup a new user
- Modify Modify the selected user
- Print Print a listing of all the users.
- Delete Delete the selected user.

#### Adding a new user:

Press the <u>New button</u>, this will display the Password Edit screen;

Passwor	d Edit 🔀
User name: Password:	
Access Level	Display Recording Department Scanning Department Send to County System Administrator
<u>_</u>	Cancel <u>O</u> K

Enter the user name.

Enter the Password.

Next select their access level, to give them access click once on an access level and a check mark will appear to the left of it, *Note: you can select more than one access level.* 

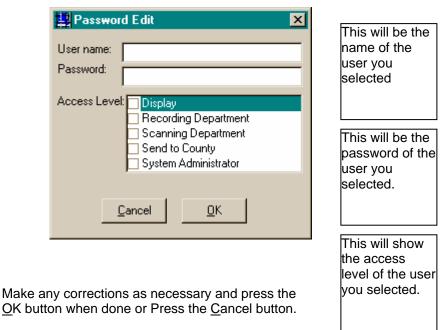
Press OK to save your new user or press Cancel to exit without adding.

## Electronic Recording Administration Manual Definition of Access Levels:

Access Level	Scan	Open	Queues	Send to County	Email Notifications	Address Book	Options
Display		✓					
Recording	✓	✓	✓	✓	✓	✓	
Scanning	✓	✓				✓	
Send to County			✓	✓	✓	✓	
System Admin	✓	✓	✓	✓	✓	✓	✓

## Modifying a User:

From the Passwords screen select a user to modify, then press the <u>M</u>odify button, this will display the Password Edit screen;

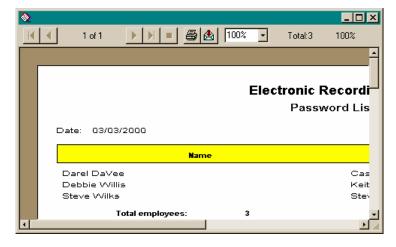


## Deleting A User:

From the Passwords screen select a the user you wish to delete, then press the <u>D</u>elete button. You will be asked to confirm whether you wish to delete this user. Press <u>Y</u>es to delete them or press <u>N</u>o to not delete them.

## Printing the Passwords:

From the Passwords screen press the  $\underline{P}$ rint Button, this will display a Crystal Reports $\odot$  Print preview window as follows;



To print the report press the report icon.

To maximize the preview window click on the Maximize  $\Box$  button.

### **Document Types Maintenance**

The document types are displayed in the Document Type pull down on the scanning screen.

From the Desktop select <u>Tools;</u> <u>D</u>ocument Types. The following will be displayed.

Document Types	
Affidavit of Property Value Agreement For Sale Assignment Builder Special Warranty Deed Death Certificate Deed of Release Deed of Release and Reconveyance Deed of Trust Disclaimer Deed Estate Tax Waiver Financing Statement	Shows all the document types currently available.
Joint Tenancy Deed	
<u>N</u> ew <u>M</u> odify <u>D</u> elete <u>C</u> ancel <u>D</u> K	

## Adding a New Document Type:

To add a New document select New;

🖏 Document Types			×
			1
1			
	<u>C</u> ancel	<u>0</u> K	
			•

Enter the document description and press <u>O</u>K to add it to the list or press <u>Cancel</u> to cancel and return to the list.

## Modifying a Document Type:

To Modify a document type first select or highlight the document type you wish to modify then select <u>M</u>odify;

🛢 Document Types			×
Deed of Release and Rec	onveyance		
	<u>C</u> ancel	<u>0</u> K	1

Now you can change the description, when finished press <u>O</u>K to save your changes and return you to the document type list or press <u>C</u>ancel to not make a change and return you to the list.

To Delete a document type first select or highlight the document type you wish to delete then select <u>D</u>elete; You will be asked to confirm the delete, press <u>Y</u>es to delete the item or press <u>N</u>o to not delete it. You will be returned to the list.

## **Electronic Recording System Monitor Module**

When maximized the Monitor module looks like this;

	🔲 Ers Monitor		_ 🗆 🗵	
	<u>F</u> ile <u>T</u> ools			Shows the
	Status: Waiting un	itil 02:00:43 PM		current Status.
Shows the current date				
	03/03/2000	02:00:36 PM		Shows whether
		Shows the current Time		email is available or not.

You have the following options;

- $\begin{array}{ll} \mbox{File} & \mbox{Has only one option under it called } E\underline{x}it. \\ \mbox{Tools} & \mbox{Has only one option under it called } \underline{O}ptions which allows you to configure the system. \\ \end{array}$ (See the section titled System Configuration for more information)

## Electronic Recording System Copy ERS Module

When the Copy ERS module is maximized it looks like this;

Copy Files To County Recorder	
<u>F</u> ile <u>T</u> ools	Shows the current status
Waiting until 02:04:34 PM	Shows what the system is doing when it is processing.
03/03/2000 02:04:28 PM	Lists any errors that have been encountered.

You have the following options;

- **File** Has only one option under it called E<u>x</u>it.
- Tools Has two options;

**Options** Which allows you to configure the system setup options. (*Note: for more information see the section title "System Configuration"*)

Log File This allows you to view the error log file. (*Note: this opens the error log file in Notepad*)