



# Electronic Recording System

Version 4.0.1

## Administrator Manual

---

<b>General Information And Helpful Hints .....</b>	<b>4</b>
Quick Keys.....	5
ERS Entry Mode .....	6
F4: .....	6
Tab: .....	6
Execute:.....	6
<b>Logon .....</b>	<b>7</b>
<b>The ERS Desktop .....</b>	<b>8</b>
Electronic Recording System Desktop.....	8
Tool Bar .....	9
Tool Bar Icons And Quick Key Alternatives.....	9
<b>File Menu.....</b>	<b>10</b>
New.....	10
Open .....	10
Exit.....	10
<b>Tools Menu .....</b>	<b>11</b>
Show Desktop.....	11
Change Queue.....	11
Document Types.....	12
New .....	12
Modify .....	14
Delete .....	15
Queues .....	16
Counties.....	16
New .....	16
Email Options .....	17
Payment Type .....	18
Print Options.....	18
OK (Save).....	18
Modify .....	19
Delete .....	20
User Management .....	21
New .....	22
Modify .....	23
Delete .....	25
Address Book.....	25
Reprint Documents .....	25
Options .....	26
General Tab.....	26
Configure Interface to County Recorder.....	27
Update ERS Database Connection Info .....	32
Impact Tab.....	33
Storage & Logging Tab.....	34
Maintenance Tab.....	35

---

Send to County Recorder .....	36
Recording Fees.....	36
License Manager .....	36
Purchase .....	37
Add .....	39
Delete .....	40
Modify .....	41
Print .....	42
Scanner Setup .....	43
Change My Password.....	43
Error Log.....	43
<b>About Menu .....</b>	<b>44</b>

# General Information And Helpful Hints

The Electronic Recording System (ERS) application directly interfaces with software at the County Recorder's Office, in order to electronically send documents to be recorded, and also receive recorded documents.

ERS has options for customization and several user access levels. There are a number of configuration options that can affect the functionality of the system, and these are discussed in this manual.

This manual will progress through the functions in the Electronic Recording System (ERS) in the order that they appear on the menus within the application. This will not be how you will work with the product, as that will depend on your responsibilities and the structure of each individual business, as well as the configuration of ERS at each business. Before discussing the system functionality in detail, there are some general features that you should be aware of. These are discussed below.

Some formatting conventions used in this manual are:

- When you need to press the Enter key, you will see **ENTER** in this manual.
- When you see text displayed on a menu or window such as the words "File" or "Cancel", you will see **File** or **Cancel** in this manual.
- **File > Open** means that you select **File** from the main menu and then select **Open** from the next menu.

## Quick Keys

Quick Keys can quickly accomplish tasks by using short cut keys instead of using the mouse to click on selections. Quick Keys are one or more keys you press on the keyboard to complete a task. For example, press and hold the Alt key and also the F key. This **ALT+F** key combination opens the **File** menu, just as clicking on the **File** menu at the top left of the Electronic Recording System (ERS) screen opens the **File** menu.

To determine if a Quick Keys combination is available, press the **ALT** key to have ERS underline the Quick Keys letter in all words that have a Quick Keys combination available. You can use the Quick Keys alternative to using the mouse, for example, use the **ALT+T** Quick Keys to drop down the **Tools** menu because the "**T**" in **T**ools is underlined. Pressing the **ALT** key to display the underlined letter is a visual aide. These Quick Keys can be used at any time, even if the letter is not displayed as underlined on the screen at the time.



ALT+T opens the Tools menu

## ERS Entry Mode

### F4:

You may use the function key **F4** when accessing a drop down list box, or you may click with the mouse on the down arrow.

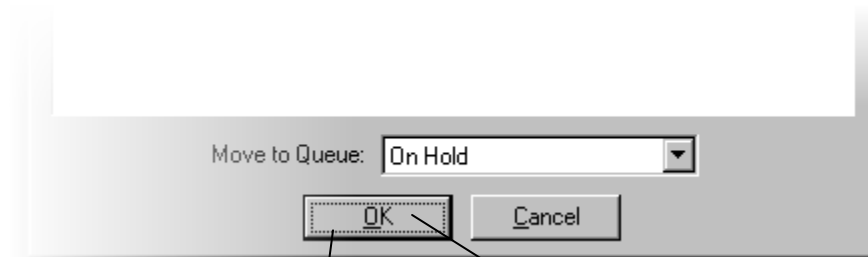
### Tab:

Use **TAB** to move forward from one entry field to the next entry field.

Use **SHIFT+TAB** to move backward from one entry field to the previous entry field.

### Execute:

When you see a button with dots on the face, you can press **ENTER** to execute that command, rather than clicking on it with the mouse, as the button already has “the focus”. Press **TAB** to move the focus to the other button(s).



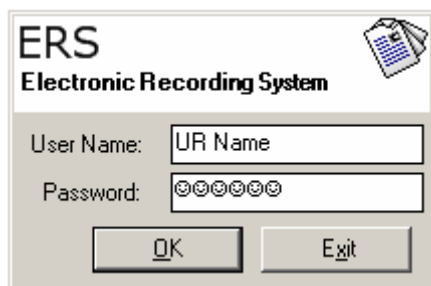
Button with dots on the face

Press ENTER to execute “OK”

# Logon

Access to the Electronic Recording System (ERS) application is controlled by a user-rights table, administered by a limited set of user name's that have sufficient authority granted to them. This is a very important control, and should be carefully managed. Depending on the access level assigned to a user, they will have access to various pieces of the ERS application, but generally not complete access.

ERS will require a user to logon, after the user double-clicks on the ERS icon on their desktop.



Enter your **User Name** in the first field, and then **TAB** to the **Password** field. Enter your password and click **OK**.

Alternatively, if you do not want to use the mouse to click **OK**, you can hit the **TAB** key until **OK** is highlighted, and hit **ENTER**.

**NOTE:** When you enter your password, it will not display on the screen, but will be represented by a series of asterisks "\*" or other special characters.

If you don't want to continue, click on **Cancel** instead. This will cause the Logon dialogue box to close and the ERS application will not be opened.

**KEEP YOUR PASSWORD PRIVATE.** You should not share your password or log on to the system and let someone else then operate under that session. The initials of the user logged on to the system will attach to transactions entered, and you will only want to be responsible for your own activity.

If you forget your password, a user with an **Access Level** of **System Administrator** for the ERS application must assign a new one.

# The ERS Desktop

## Electronic Recording System Desktop

The Electronic Recording System will display a desktop as shown below when a user signs into the ERS application.



**NOTE:** Depending on a user's access level, not all of the menu options or tool bar icons may be available to them. See the **User Management** section below for a comparison of the **Access Level** selections available for each user.

For example, a user with the "Scanning Department" access level enabled, will have access to the **New File**, **Open Package** and **Address Book** tool bar icons, and the **Tools** menu will have available the **Show Desktop**, **Address Book**, **Reprint Documents**, **Change My Password**, and **Error Log** options.

A user with the "Scanning Department" and "Send to County" access levels enabled, for example, will have access to the **New File**, **Open Package**, **Send to County Recorder**, **Address Book**, and **Queues** tool bar icons, and the **Tools** menu will have available the **Show Desktop**, **Change Queue**, **Queues**, **Address Book**, **Reprint Documents**, **Send to County Recorder**, **Recording Fees**, **Change My Password**, and **Error Log** options.








## Tool Bar

The tool bar gives quick access to several commonly used ERS functions. Hold the cursor over a icon on the ERS tool bar to see its description.



## Tool Bar Icons And Quick Key Alternatives

The following table describes each of the tools that can be found on the ERS toolbar; and the Quick Key alternatives – should you not want to use the mouse.

Button	Tool Name	Quick Keys
	New File	<b>CTRL+N</b>
	Open Package	<b>CTRL+O</b>
	Options	<b>CTRL+P</b>
	Send to County Recorder	<b>CTRL+E</b>
	Address Book	<b>CTRL+A</b>
	Queues	<b>CTRL+Q</b>
	Reprint Documents	<b>CTRL+R</b>

# File Menu

## New

This menu item is discussed in the Electronic Recording System v4.0.1 User Manual.

## Open

This menu item is discussed in the Electronic Recording System v4.0.1 User Manual.

## Exit

Select either **Exit** from the **File** menu, or use the **CTRL+X** Quick Keys to close the ERS application and return to the Windows desktop. You should **Exit** out of ERS when you are leaving your desk for an extended period, or are going home for the day. Always **Exit** out of ERS at the end of each day, before logging off of your computer. If you leave your ERS session logged on, others will have access to your “rights”, and this could raise security concerns.

# Tools Menu

## Show Desktop

Select **Show Desktop** from the **Tools** menu to clear the screen and return to the ERS desktop, or use the **CTRL+D** Quick Keys.

## Change Queue

This menu item is discussed in the Electronic Recording System v4.0.1 User Manual.

## Document Types

Select **Document Types** from the **Tools** menu to clear the screen and open the **Counties** dialogue box.

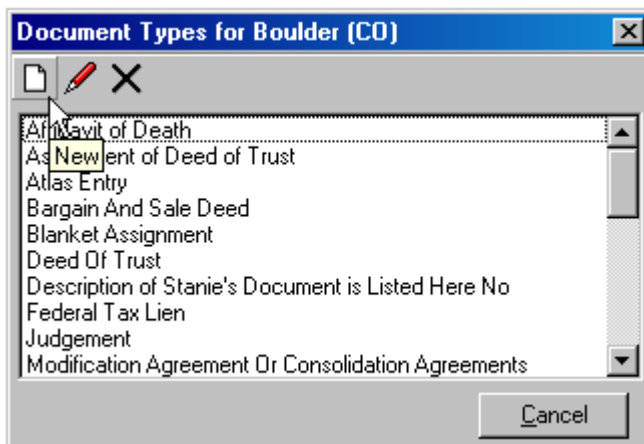
Click on the **County** drop down list arrow to select the correct County Recorder's Office interface, or press **F4** and use the down or up arrow keys.



Click on **OK** to open the **Document Types** screen, or **Cancel** to return to the ERS desktop.

## New

Click on the **New** icon located at the left side of the tool bar to open the **New Document Type** screen.

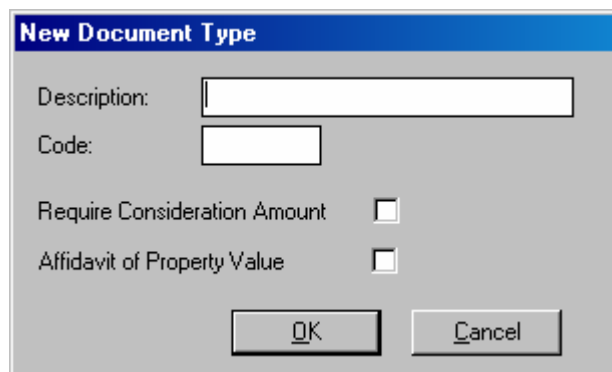


In the **Description** field, enter the description for the **Type of Document**. The description entered here is available on the **Type of Document** drop down list, when scanning or importing a document into ERS at the **New File** screen.

In the **Code** field, enter the appropriate code that is compatible with the County Recorder's Office interface.

If appropriate, click on the check box to the left of **Require Consideration Amount**. Normally, this check box will be left blank, unless ERS interfaces with software at a County Recorder's Office that uses the amount in this field to calculate documentation fees. If **Require Consideration Amount** is selected here, the user is required to enter an amount in the **Consideration Amount** field on the **New File** screen. When the **Accept Document** button is clicked, a red icon will be displayed to the right of the **Consideration Amount** field if it does not contain a valid number.

If appropriate, click on the check box to the left of **Affidavit of Property Value**. A check mark will be displayed in the box if it is selected. To unselect a checked item, click on the checked item again. If **Affidavit of Property Value** is selected here, then **Affidavit of Property Value** and a check box, are displayed below the **Type of Document** drop down list, when scanning or importing a document into ERS at the **New File** screen.

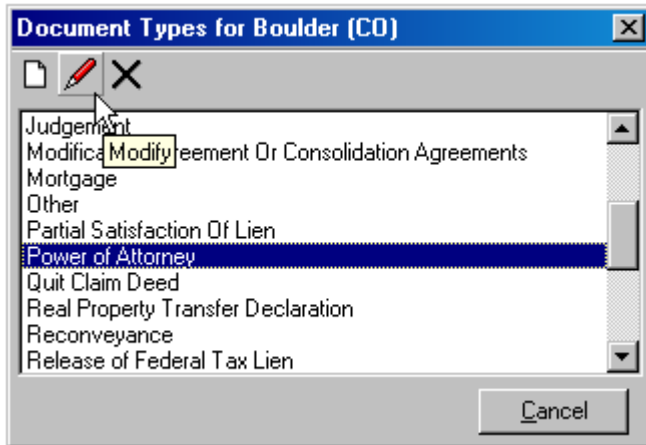


The image shows a dialog box titled "New Document Type". It has a blue header bar with the title. Below the header, there are four rows of input fields. The first row is labeled "Description:" and has a large white text box. The second row is labeled "Code:" and has a smaller white text box. The third row is labeled "Require Consideration Amount" and has an unchecked checkbox. The fourth row is labeled "Affidavit of Property Value" and has an unchecked checkbox. At the bottom of the dialog, there are two buttons: "OK" and "Cancel".

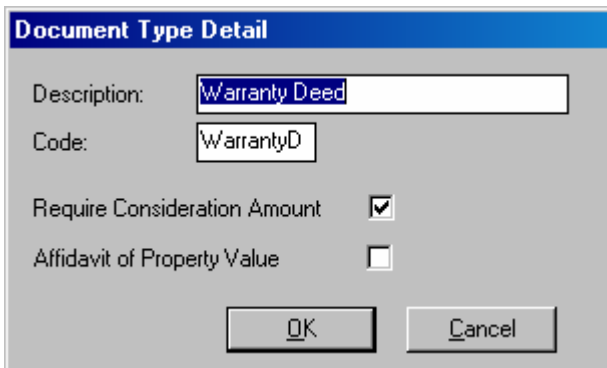
Click on **OK** to save the **New Document Type** entry, or click **Cancel** to abort the entries and return to the **Document Types** screen.

# Modify

To modify a document type entry, highlight a document type on the list, then click on the **Modify** icon located on the tool bar, or just double-click on the document type, to proceed to the **Document Type Detail** screen.



Make the appropriate changes in the **Description** and **Code** fields.



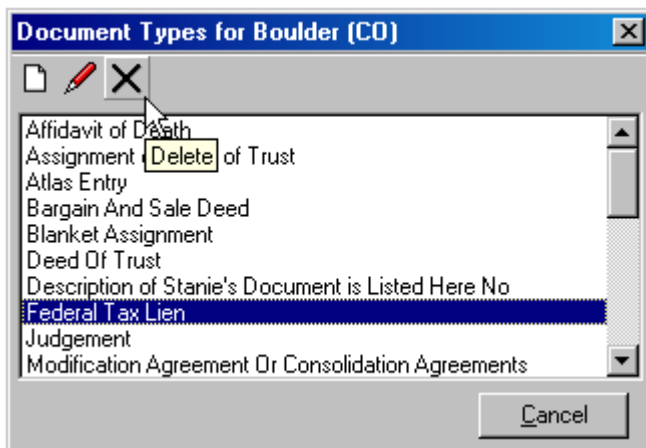
If appropriate, click on the check box to the left of **Require Consideration Amount**. Normally, this check box will be left blank, unless ERS interfaces with software at a County Recorder's Office that uses the amount in this field to calculate documentation fees. If **Require Consideration Amount** is selected here, the user is required to enter an amount in the **Consideration Amount** field on the **New File** screen. When the **Accept Document** button is clicked, a red icon will be displayed to the right of the **Consideration Amount** field if it does not contain a valid number.

If appropriate, click on the check box to the left of **Affidavit of Property Value**. A check mark will be displayed in the box if it is selected. To unselect a checked item, click on the checked item again. If **Affidavit of Property Value** is selected here, then **Affidavit of Property Value** and a check box, are displayed below the **Type of Document** drop down list, when scanning or importing a document into ERS at the **New File** screen.

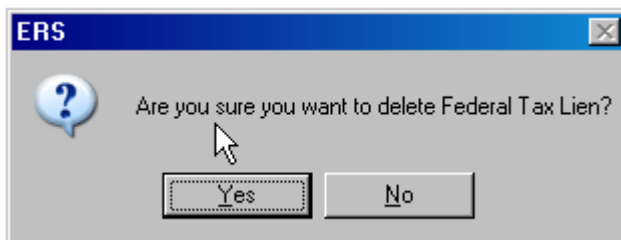
Click on **OK** to save the changes, or click **Cancel** to abort any changes, and return to the **Document Types** screen.

## Delete

To remove an existing document type entry, highlight an document type on the list, then click on the **Delete** icon located on the tool bar.



Click on **Yes** to delete the document type entry, or **No** to keep the document type entry, and return to the **Document Types** screen.



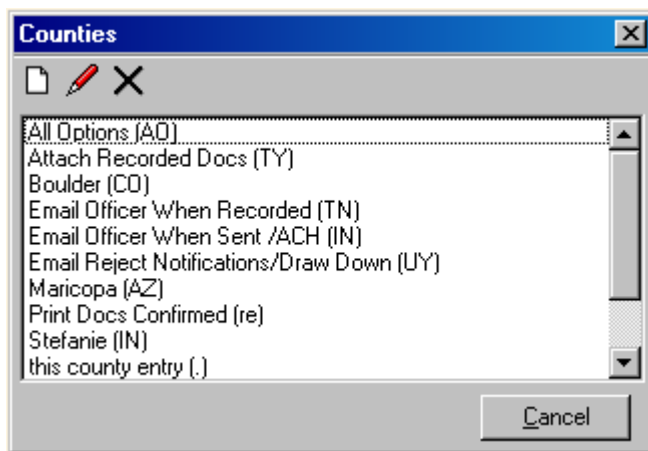
## Queues

This menu item is discussed in the Electronic Recording System v4.0.1 User Manual.

## Counties

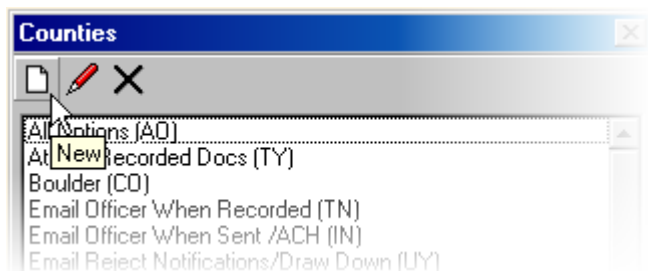
Select **Counties** from the **Tools** menu to clear the screen and open the **Counties** screen.

Currently, ERS can only connect with those systems that use the Eagle County Recorders Interface.



## New

Click on the **New** icon located at the left side of the tool bar to open the **County Details** screen.



Enter the County Recorder's Office name in the **County Name** field, and the two (2) letter state abbreviation in the **State** field.

The **Routing No** and **Account No** fields are reserved for future use.

Enter a UNC printer name in the **Doc Printer** field, or leave the field blank to have ERS use the system's default printer.

Enter a UNC printer name in the **Label Printer** field if using a label printer, or leave the field blank to have ERS use the system's default printer.

Click on the **Interface** drop down list arrow to select the correct County Recorder's Office interface, or press **TAB** to move to the **Interface** drop down list, then press **F4** and use the down or up arrow keys.

**County Details**

County Name:

State:

Routing No:

Account No:

Doc Printer:

Label Printer:

Interface:

Allow Multiple Packages Per File

Payment Type

ACH

Draw Down

None

Email Options

Email Notifications When Sent

Email Notifications When Recorded

Attach Recorded Docs

Email Reject Notifications

Address:

Print Options

Print Hard Copy of Documents Recorded

Print Labels

OK Cancel

## Email Options

Click on the **Email Notifications When Sent** option to enable ERS to send an e-mail to any address selected in the **Select Parties to Notify** screen, when a package is sent to the county Recorder's Office. For details regarding the **Select Parties to Notify** screen, see the **New** section of the **File Menu** section of the Electronic Recording System v4.0.1 User Manual.

Click on the **Email Notifications When Recorded** option to enable ERS to send an e-mail to any address selected in the **Select Parties to Notify** screen, when a package recorded at the county Recorder's Office is returned to ERS.

The **Attach Recorded documents** option will be active (not dimmed-out) when the previous option is enabled. Click on the **Attach Recorded documents** option to have ERS attach the recorded documents to the message that is sent to the e-mail recipient(s).

If the **Email Reject Notifications** option is selected, enter the e-mail address in the **Address** field of the person ERS will notify by e-mail when the County Recorder's Office rejects a document.

## Payment Type

These fields are reserved for future use.

## Print Options

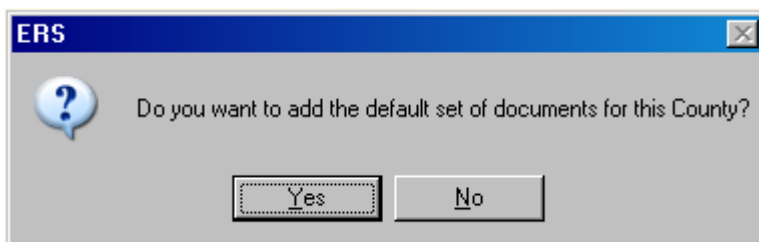
If the **Print Hard Copy of Documents Recorded** option is selected, ERS will automatically print the recorded document to the printer entered in the **Doc Printer** field.

If the **Print Labels** option is selected, ERS will automatically print the recorded document label to the printer entered in the **Label Printer** field.

## OK (Save)

Click on **OK** to save the entries that were established for this county, or **Cancel** to close and return the ERS desktop without saving the entries.

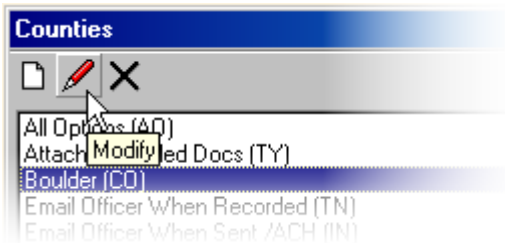
If **OK** is selected, then a dialogue box will pop up. Click on **Yes** to have ERS automatically create the **Document Types** that are compatible with the Eagle County Recorders Interface, or **No** to manually create the **Document Types** later. See the **Document Types** section above for details about manually creating a document type.



## Modify

Select a county name by using the arrow keys and then press **TAB** then **TAB** so the **OK** button has the focus, then **ENTER**, or just double-click on the correct county name and click **OK**.

Double-click on the county name to open the **County Details** screen, or select a county name from the list, then click on the **Modify** icon located at the left side of the tool bar to open the **County Details** screen.



Make the appropriate changes, then click on **OK** to save the changes, or click **Cancel** to abort any changes and return to the **Counties** screen.

**County Details**

County Name:   Allow Multiple Packages Per File

State:

Routing No:

Account No:

Doc Printer:

Label Printer:

Interface:

Payment Type

ACH

Draw Down

None

Email Options

Email Notifications When Sent

Email Notifications When Recorded

Attach Recorded Docs

Email Reject Notifications

Address:

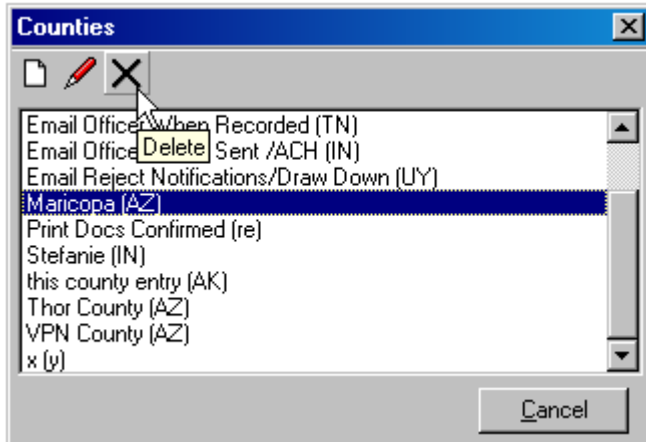
Print Options

Print Hard Copy of Documents Recorded

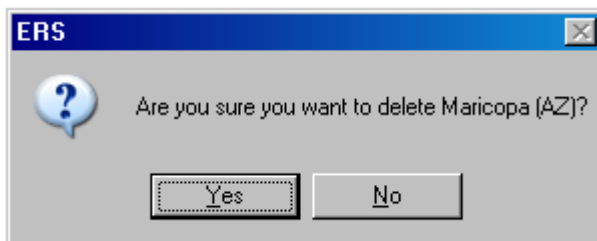
Print Labels

## Delete

Highlight an county name on the list, then click on the **Delete** icon on the **Counties** tool bar, to delete a name from the **Counties** list.



A confirmation dialogue box will pop up. Press **ENTER** or click on **Yes** to proceed.



## User Management

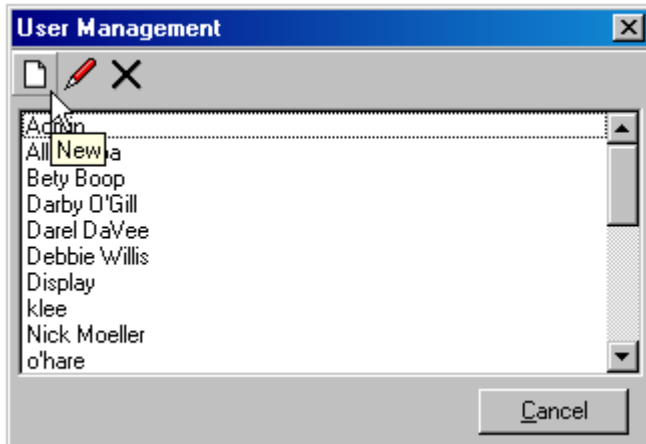
A user with an ERS **Access Level** of **System Administrator** can access all of the ERS options, including the **User Management** option from the **Tools** menu. The **User Management** screen allows for the setup of a **New** user entry, with one or more access levels for the user, and from this screen you can **Modify** user access levels, and **Delete** any user entry.

The following table shows the relationship between **Access Level** and the corresponding access to menu items.

Menu Item	Access Level				
	Display	Recording Department	Scanning Department	Send to County	System Administrator
New		✓	✓		✓
Open	✓	✓	✓		✓
Exit	✓	✓	✓	✓	✓
Show Desktop	✓	✓	✓	✓	✓
Change Queue		✓		✓	✓
Document Types					✓
Queues		✓		✓	✓
Counties					✓
User Management					✓
Address Book		✓	✓	✓	✓
Reprint Documents		✓	✓	✓	✓
Options					✓
Send to County Recorder		✓		✓	✓
Recording Fees		✓		✓	✓
License Manager					✓
Scanner Setup					✓
Change My Password	✓	✓	✓	✓	✓
Error Log	✓	✓	✓	✓	✓
About	✓	✓	✓	✓	✓

## New

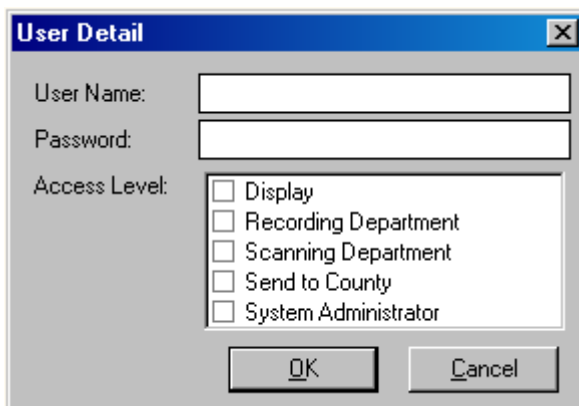
Click on the **New** icon located at the left side of the tool bar to open the **User Detail** screen.



In the **User Name** field, enter a name.

In the **Password** field, enter a password of a least six (6) characters.

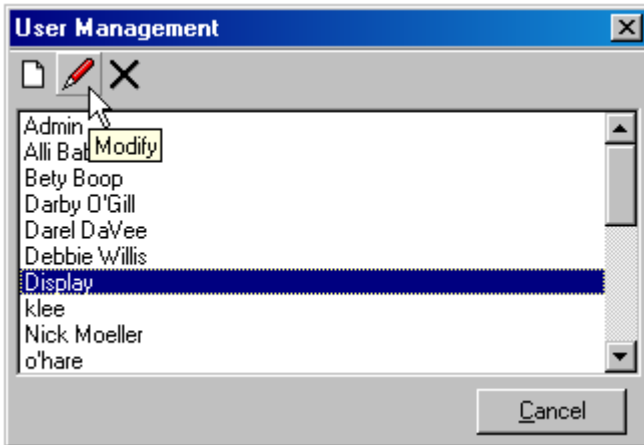
In the **Access Level** area of the screen, click on one or more access levels to assign to the user. A check mark will be displayed to the left of each **Access Level** selected. To unselect a checked item, click on the checked item again.



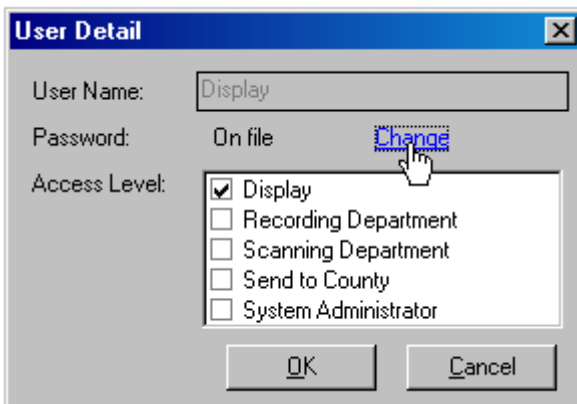
Click on **OK** to save the new user entry, or click **Cancel** to abort the entries, and return to the **User Management** screen.

# Modify

To modify an existing user entry, highlight a user name on the list, then click on the **Modify** icon located on the tool bar, or just double-click on the user name, to proceed to the **User Detail** screen.



To change the user's **Password**, click on **Change**.

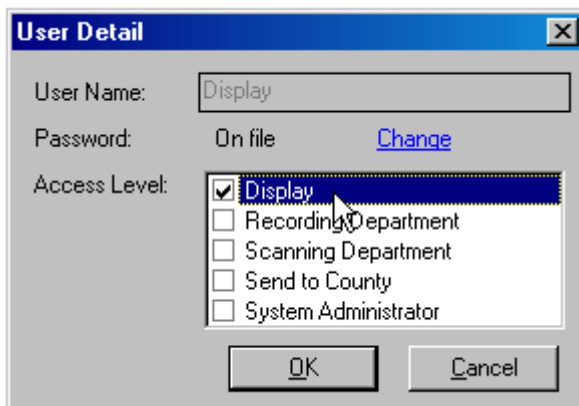


Enter the new password of a least six (6) characters in the **Enter Password** field, then enter the password again in the **Confirm Password** field. Click on **OK** to save the new password, or click **Cancel** to abort the entries, and return to the **User Detail** screen.



The image shows a dialog box titled "User Password". It contains two text input fields: "Enter Password:" and "Confirm Password:". Below the fields are two buttons: "OK" and "Cancel".

In the **Access Level** area of the screen, click on one or more access levels to assign to the user. A check mark will be displayed to the left of each **Access Level** selected. To unselect a checked item, click on the checked item again.



The image shows a dialog box titled "User Detail". It contains the following fields and controls:

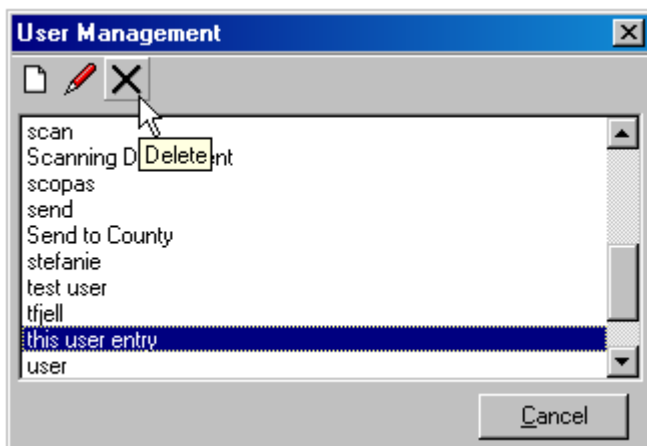
- User Name: Display
- Password: On file [Change](#)
- Access Level: A list box with the following items:
  - Display
  - Recording Department
  - Scanning Department
  - Send to County
  - System Administrator

At the bottom of the dialog box are two buttons: "OK" and "Cancel".

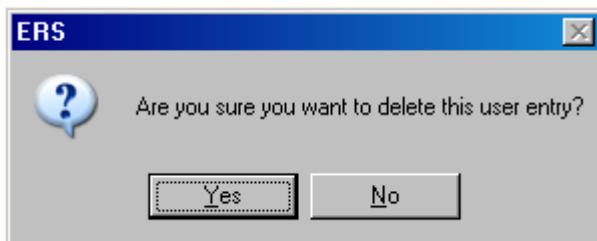
Click on **OK** to save the changes, or click **Cancel** to abort the entries, and return to the **User Management** screen.

## Delete

To remove an existing user entry, highlight a user name on the list, then click on the **Delete** icon located on the tool bar.



Click on **Yes** to delete the user entry, or **No** to keep the user entry, and return to the **User Management** screen.



## Address Book

This menu item is discussed in the Electronic Recording System v4.0.1 User Manual.

## Reprint Documents

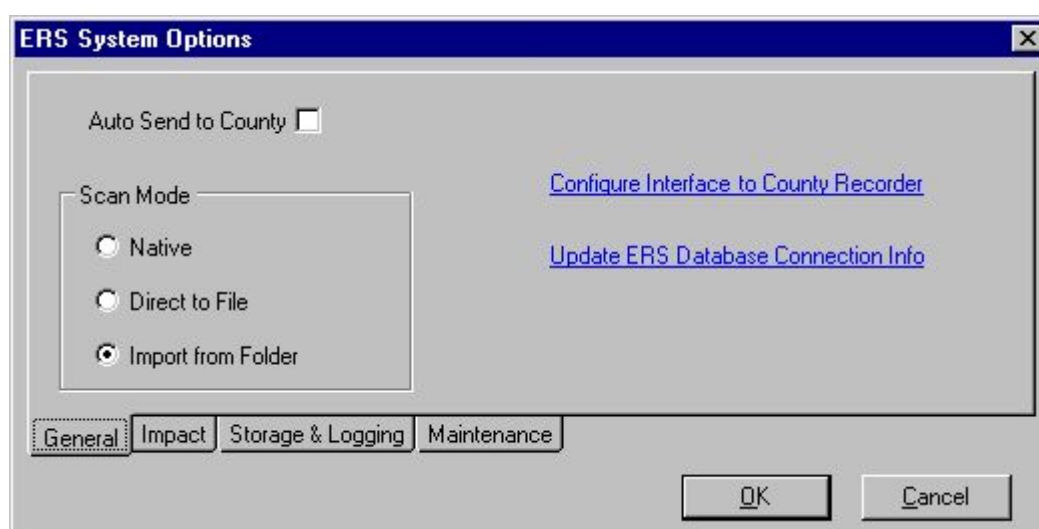
This menu item is discussed in the Electronic Recording System v4.0.1 User Manual.

## Options

Select either **Options** from the **Tools** menu, or use the **CTRL+P** Quick Keys to open the **ERS System Options** screen. There are five (5) tabs at the bottom of the screen. The **General** tab is selected by default when **Options** is selected from the **Tools** menu. Click on any tab to change to that screen.

## General Tab

The **General** tab is selected by default when **Options** is selected from the **Tools** menu.



Click on the box to the right of **Auto Send to County** to enable or disable this option. A check mark will be displayed in this box when this option is enabled. To disable the **Auto Send to County** option, click on the checked box again to remove the check mark.

**NOTE:** If the ERS system option **Auto Send to County** is enabled, then the **Send to County Recorder** icon will not be displayed on the tool bar, and the **To Be Sent to County** queue will never have a plus sign to the left of it as all files put into the queue will be promptly sent.

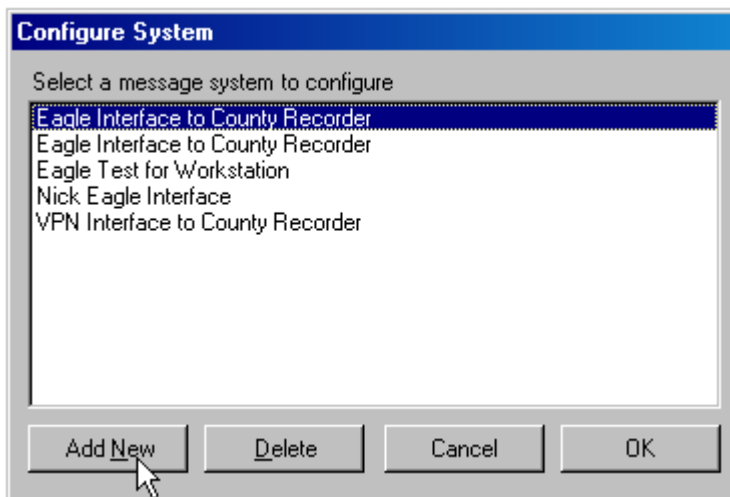
If the ERS system option **Auto Send to County** is enabled, and a **File Number** is moved from any queue to the **To Be Sent to County** queue, a confirmation dialogue box will pop up. If **Yes** is selected, ERS will proceed to promptly send the file to the County Recorder's Office.

In the **Scan Mode** area of the screen, the **Native** radio button option is selected by default. If the document scanning function isn't working correctly, try selecting the **Direct to File** radio button option instead. Select the **Import from Folder** radio button if scanning will not be performed at this workstation, for example, a network scanner is used to scan the documents to a 200 DPI Tagged Image File (TIF) format, and then they are saved in a shared network drive or folder. Check with your company on the policy for the TIF file naming conventions and file location(s).

**NOTE:** All documents must be scanned at a 200 DPI resolution and saved in a multi-page Tagged Image File (TIF) format.

## Configure Interface to County Recorder

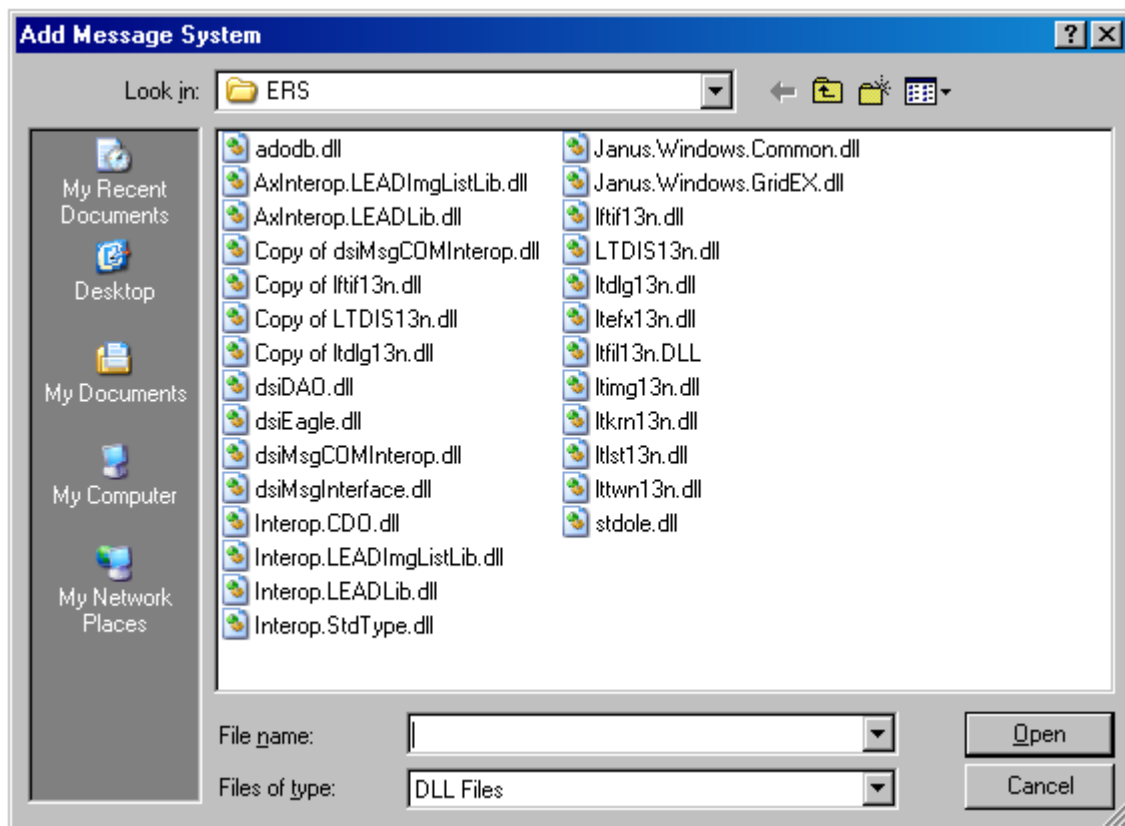
Click on **Configure Interface to County Recorder** to open the **Configure System** screen.



## Add New

Click on the **Add New** button at the lower left corner of the screen to add a new message system.

Clicking on the **Add New** button at the lower left corner of the will display an open file dialogue screen from which you can browse and select the appropriate DLL file for the message system, for example, C:\Program Files\USA DSI\ERS\dsiEagle.dll may be the needed file.



When the appropriate DLL file is selected, click on **Open** to proceed to the **Configure Eagle System** screen.

The selected file name and location is displayed in the **Assembly Name** field.

Type in an appropriate description in the **System Name** field. The **System Type** and **Save Response** fields may remain at the default settings.

**Configure Eagle System**

System Name: Eagle Interface to County Recor OK

System Type: ERS Cancel

Save Response To: None

Assembly Name: C:\Program Files\USA Digital Solutions\D

Account Settings

Web Service URL: http://hal.tyler-eagle.com:8080/quickdocs/s

User Name:

Password:

Email Error Notifications

Error Email To:

SMTP Server:

SMTP UserID:  Test Email...

SMTP Password:

In the **Account Settings** area of the screen, enter the URL to the County Recorder's Office interface in the **Web Service URL** field, the Company's assigned user name in the **User Name** field, and the appropriate password in the **Password** field.

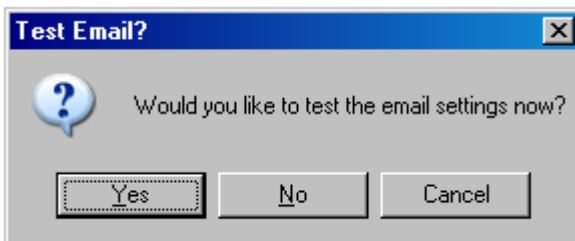
In the **Email Error Notifications** area of the screen, enter a properly formatted e-mail address in the **Error Email To** field, the email server that will send the message in the **SMTP Server** field, and in the next two fields, if required by the **SMTP Server**, enter **SMTP UserID** and **SMTP Password** information. Click on **Test Email** to have ERS attempt to send an e-mail message to the recipient.

If the **Test Email** message was sent successfully, click on the **OK** button of the **Email Sent** pop up alert box, to return to the **ERS System Options** screen. This **Test Email** message will be received by the recipient's e-mail application like any other e-mail message received.



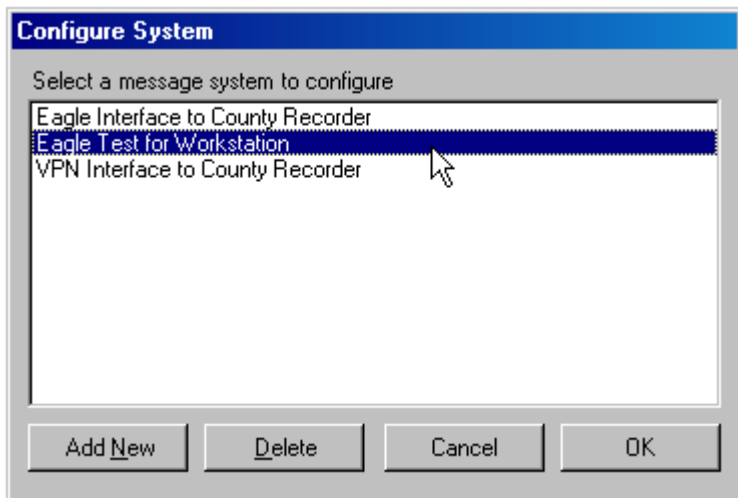
If the test email was not sent successfully, click on the **OK** button of the pop up **Email not sent** alert box, to return to the **Configure System** screen and make the necessary changes to the fields in the **Email Error Notifications** area of the screen.

After making the appropriate entries on the **Configure Eagle System** screen, click **OK** to save the information, or **Cancel** to exit without saving, and return to the **ERS System Options** screen. If you did not click on **Test Email** after entering data in the **Email Error Notifications** area of the screen, a pop up dialogue box will ask if you want to send an e-mail message to the recipient. Click on **Yes** to have ERS attempt to send the e-mail, **No** to return to the **ERS System Options** screen, or **Cancel** to return back to the **Configure Eagle System** screen.



## Delete

Highlight a message system name on the list, then click on the **Delete** button to delete the message system configuration from the **Configure System** screen.



**NOTE:** A message system configuration cannot be deleted if it is already in use.

## Cancel

Click on **Cancel** to return to the **ERS System Options** screen.

## OK (Modify)

To modify an existing entry, highlight a message system name on the list, then click on the **OK** button at the lower right corner of the screen, or just double-click on the message system name, to proceed to the **Configure Eagle System** screen. See the **Add New** section above for details on filling out the fields on this screen.

## Update ERS Database Connection Info

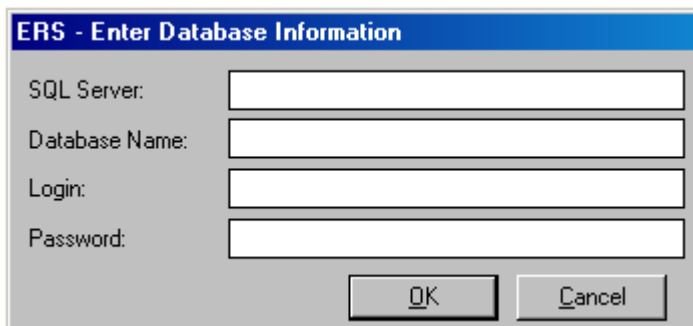
Click on **Update ERS Database Connection Info** to open the **Enter Database Information** screen.

Enter the name of the computer that is running the SQL server in the **SQL Server** field.

Enter the name of the database that was setup by USA Digital Solutions for electronic recording, in the **Database Name** field.

Enter login name for the ERS user to access the electronic recording database in the **Login** field.

Enter the login password in the **Password** field.



The image shows a dialog box titled "ERS - Enter Database Information". It has a blue header bar with the title in white. The main area is grey and contains four text input fields, each with a label to its left: "SQL Server:", "Database Name:", "Login:", and "Password:". At the bottom right of the dialog, there are two buttons: "OK" and "Cancel".

Click on **OK** to save the entries, or **Cancel** to abort the entries; either will return to the **ERS System Options** screen. Upon successful completion, this will also create the ERSDB.ENC file in the ERS working folder.

## Impact Tab

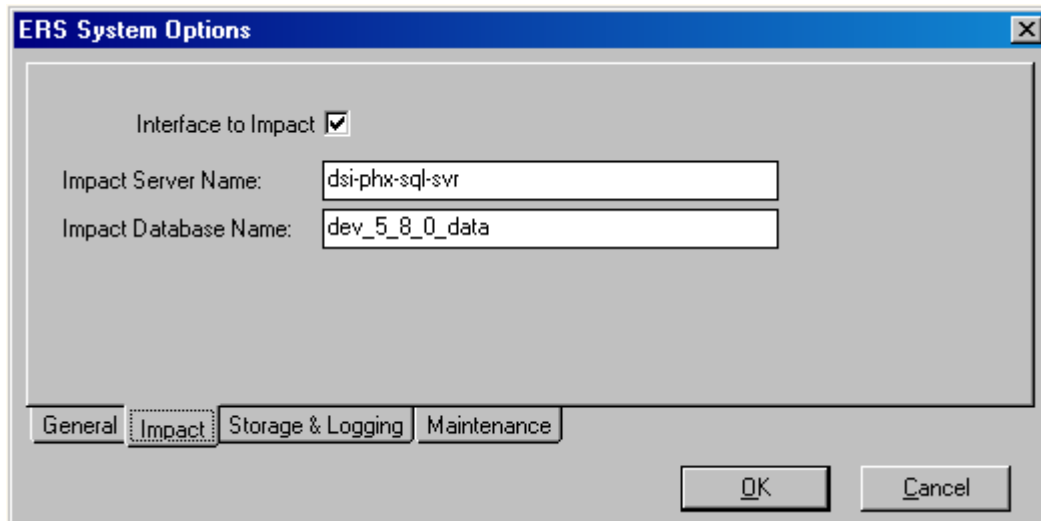
Select either **Options** from the **Tools** menu, or use the **CTRL+P** Quick Keys to open the **ERS System Options** screen. There are five (5) tabs at the bottom of the screen. The **General** tab is selected by default when **Options** is selected from the **Tools** menu. Click on the **Impact** tab at the bottom of the **ERS System Options** screen.

If your firm is running the Impact module, ERS can interface and get various information from Impact, for example, the escrow officer name, escrow officer e-mail address, and ERS can verify that an escrow file number exists.

Click on the box to the right of **Interface to Impact** to enable or disable this option. A check mark will be displayed in this box when this option is enabled. To disable the **Interface to Impact** option, click on the checked box again to remove the check mark.

Enter the name of the computer that is running the Impact database server in the **Impact Server Name** field.

Enter the name of the Impact database in the **Impact Database Name** field.



The screenshot shows the "ERS System Options" dialog box with the "Impact" tab selected. The "Interface to Impact" checkbox is checked. The "Impact Server Name" field contains "dsi-phx-sql-svr" and the "Impact Database Name" field contains "dev\_5\_8\_0\_data". At the bottom, there are four tabs: "General", "Impact", "Storage & Logging", and "Maintenance". The "Impact" tab is currently active. There are "OK" and "Cancel" buttons at the bottom right.

Click on **OK** to save the entries, or **Cancel** to abort the entries; either will return to the ERS desktop.

## Storage & Logging Tab

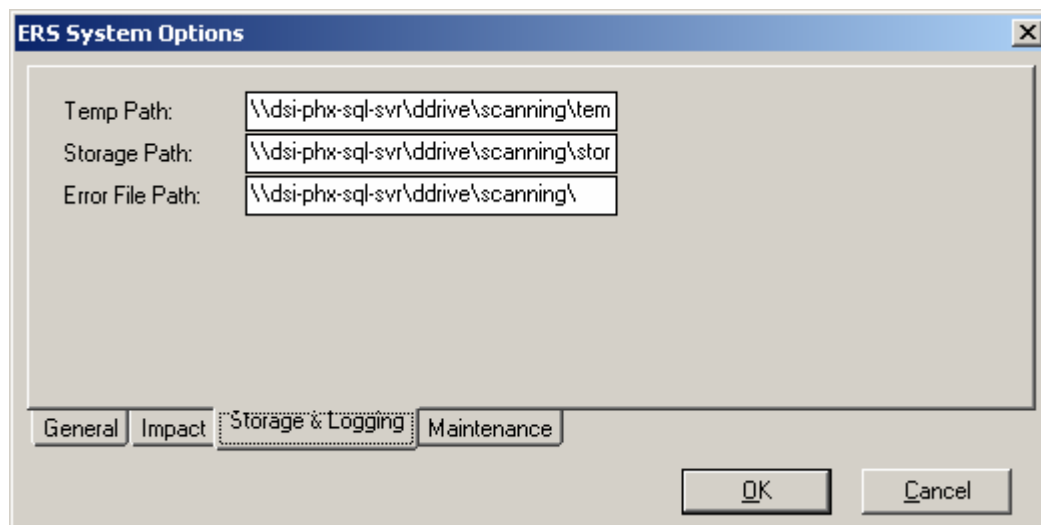
Select either **Options** from the **Tools** menu, or use the **CTRL+P** Quick Keys to open the **ERS System Options** screen. There are five (5) tabs at the bottom of the screen. The **General** tab is selected by default when **Options** is selected from the **Tools** menu. Click on the **Storage & Logging** tab at the bottom of the **ERS System Options** screen.

In the **Temp Path** field, enter the path to the location for temporary files created by ERS while scanning documents.

**NOTE:** The path entry in the **Temp Path** field must be unique for every ERS installation that uses a scanner. The path to the location for temporary files created by ERS while scanning documents cannot be shared with any other computer.

In the **Storage Path** field, enter the UNC path to the location for files that store the scanned files, recorded documents and labels.

In the **Error File Path** field, enter the path to the location of the **Error Log** file.



Click on **OK** to save the entries, or **Cancel** to abort the entries; either will return to the ERS desktop.

## Maintenance Tab

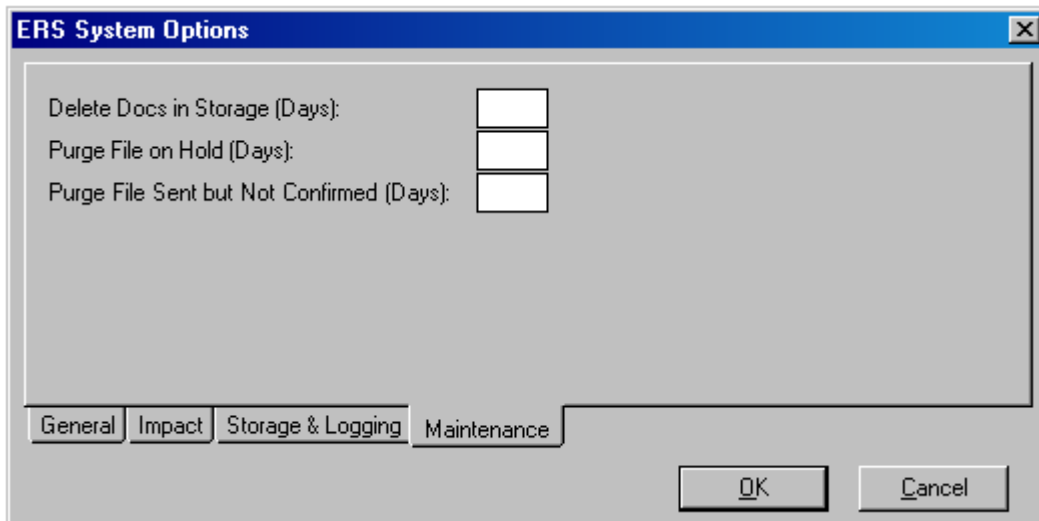
Select either **Options** from the **Tools** menu, or use the **CTRL+P** Quick Keys to open the **ERS System Options** screen. There are five (5) tabs at the bottom of the screen. The **General** tab is selected by default when **Options** is selected from the **Tools** menu. Click on the **Maintenance** tab at the bottom of the **ERS System Options** screen.

In the **Delete Docs in Storage** field, enter the number of days to keep the files stored at the path entered within the **Storage Path** field, before deletion from ERS and the computer.

In the **Purge File on Hold** field, enter the number of days to keep the files that are placed in the **On Hold** queue before deletion from ERS and the computer.

In the **Purge File Sent but Not Confirmed** field, enter the number of days to keep the files that have been sent to the County Recorder's Office for which ERS has not yet received a confirmation of receipt, before deletion from ERS and the computer.

To disable any of these options, leave the field blank.



The screenshot shows a dialog box titled "ERS System Options" with a close button (X) in the top right corner. The dialog box contains three input fields for days, each with a label and a text box:

- Delete Docs in Storage (Days):
- Purge File on Hold (Days):
- Purge File Sent but Not Confirmed (Days):

At the bottom of the dialog box, there are four tabs: "General", "Impact", "Storage & Logging", and "Maintenance". The "Maintenance" tab is currently selected. Below the tabs are two buttons: "OK" and "Cancel".

Click on **OK** to save the entries, or **Cancel** to abort the entries; either will return to the ERS desktop.

## Send to County Recorder

This menu item is discussed in the Electronic Recording System v4.0.1 User Manual.

## Recording Fees

This menu item is discussed in the Electronic Recording System v4.0.1 User Manual.

## License Manager

Select **License Manager** from the **Tools** menu to open the **End User License Manager** screen.

The ERS **System Administrator** keeps track of all of the workstations that have ERS installed on them, from the **End User License Manager** screen.

On this screen the ERS **System Administrator** can see general information about the licensee (the company) in the upper left quarter; the number of users authorized, in the **License Information** area in the upper right quarter; and, the specific workstations identified as the users of the licenses, in the lower left corner. The **Workgroup** field can be used to group workstations by location or server, for example, **TS** can be used for **Terminal Sever**.

**End User License Manager**

**Company Information**

Name: asdf  
 Contact Name: asdf  
 Address #1: asdf  
 Address #2: asdf  
 City, State and Zip: asdf  
 Phone Number:

**License Information:**

Serial Number:  
 Number of Users: 10  
 Purchase Date: 01/25/2005  
 Purchase

**Workstation Identification**

Workgroup	Workstation
DSI	ADMINISTRATOR
DSI	DDAVEE
DSI	KLEE
DSI	LALLEN
DSI	NMOELLER

Add  
 Delete  
 Modify

Workgroup:  
 Workstation:  
 Cancel OK

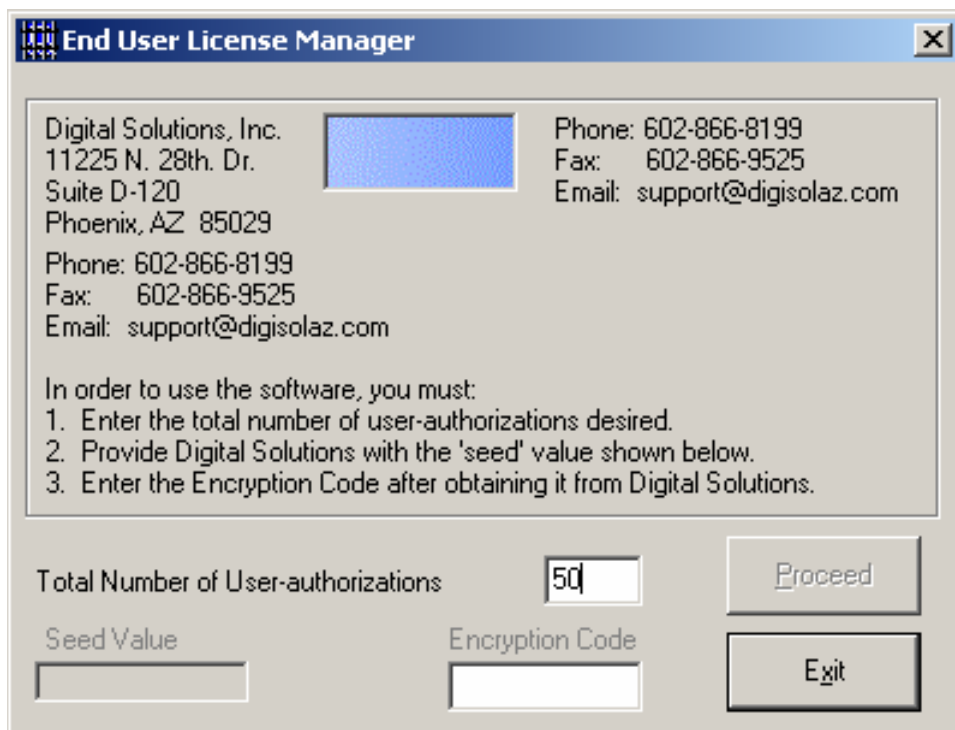
Print  
 Cancel OK

## Purchase

Companies may purchase additional licenses as needed. Before assuming a new license is needed, review the existing **Workstation Identification** information – you may find workstations that can be deleted.

When a new license is required, the company's system administrator should call USA Digital Solutions at (602) 866-8199.

Click on the **Purchase** button in the **License Information** area in the upper right quarter of the screen, to open this screen.



The screenshot shows a dialog box titled "End User License Manager". It contains contact information for Digital Solutions, Inc. and instructions for software use. The "Total Number of User-authorizations" field is set to 50. There are "Proceed" and "Exit" buttons.

Digital Solutions, Inc.  
11225 N. 28th. Dr.  
Suite D-120  
Phoenix, AZ 85029  
Phone: 602-866-8199  
Fax: 602-866-9525  
Email: support@digisolaz.com

Phone: 602-866-8199  
Fax: 602-866-9525  
Email: support@digisolaz.com

In order to use the software, you must:

1. Enter the total number of user-authorizations desired.
2. Provide Digital Solutions with the 'seed' value shown below.
3. Enter the Encryption Code after obtaining it from Digital Solutions.

Total Number of User-authorizations:

Seed Value:

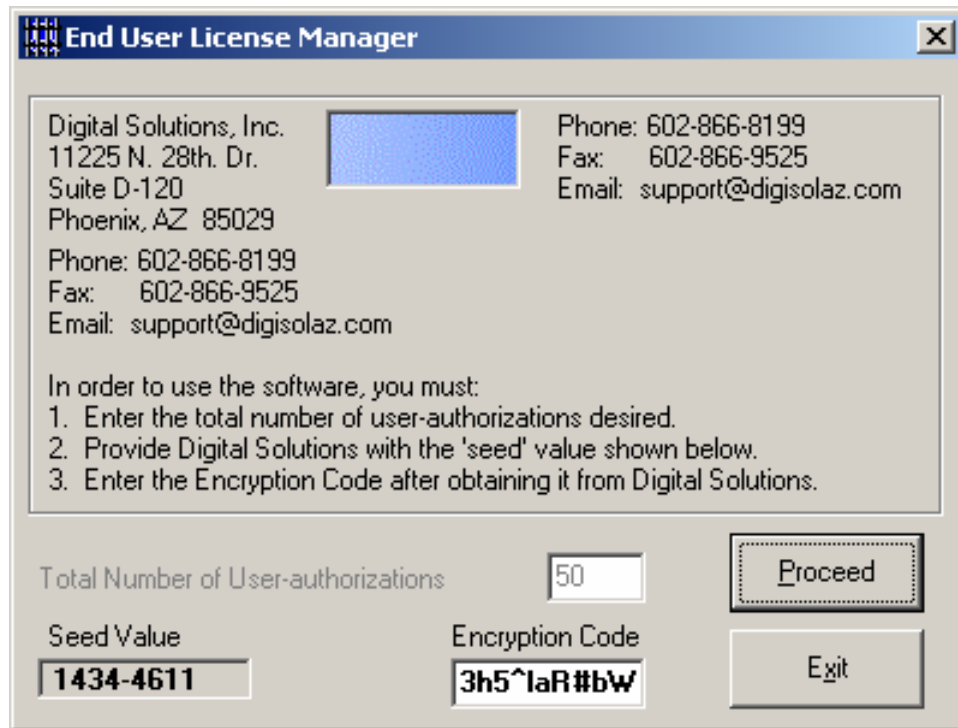
Encryption Code:

Buttons: Proceed, Exit

Enter the number of **ADDITIONAL** licenses required into the field labeled **Total Number of User-authorizations**.

A pair of numbers will appear in the **Seed Value** field (lower left corner).

USA Digital Solutions, Inc. (DSI), when called, will ask for this number. DSI will enter the values into a program and generate an **Encryption Code**, which will be give to the system administrator, who will enter it in the field of that name on the same screen.



The screenshot shows a Windows-style dialog box titled "End User License Manager". It contains contact information for Digital Solutions, Inc. (DSI) and instructions for software use. The dialog includes input fields for "Total Number of User-authorizations" (set to 50), "Seed Value" (1434-4611), and "Encryption Code" (3h5^!aR#bW). There are "Proceed" and "Exit" buttons.

Digital Solutions, Inc.  
11225 N. 28th. Dr.  
Suite D-120  
Phoenix, AZ 85029  
Phone: 602-866-8199  
Fax: 602-866-9525  
Email: support@digisolaz.com

Phone: 602-866-8199  
Fax: 602-866-9525  
Email: support@digisolaz.com

In order to use the software, you must:

1. Enter the total number of user-authorizations desired.
2. Provide Digital Solutions with the 'seed' value shown below.
3. Enter the Encryption Code after obtaining it from Digital Solutions.

Total Number of User-authorizations: 50

Seed Value: 1434-4611

Encryption Code: 3h5^!aR#bW

Buttons: Proceed, Exit

Once the code has been entered, the system administrator will be allowed to enter additional workstations on the **End User License Manager** screen.

The licensee (the company) will be billed for all licenses.

## Add

If a **Workstation** user identification has changed, highlight a **Workstation** user identification in the **Workstation Identification** area of the screen, and then click on the **Modify** button in the center of the screen, to correct it. To add a workstation, if less than the limit have been entered, click on the **Add** button.

The screenshot shows the 'End User License Manager' dialog box. It has a title bar with a close button. The main area is divided into four sections:

- Company Information:** Fields for Name, Contact Name, Address #1, Address #2, City, State and Zip, and Phone Number, all containing 'asdf'.
- License Information:** Fields for Serial Number, Number of Users (set to 10), and Purchase Date (set to 01/25/2005). A 'Purchase' button is located below these fields.
- Workstation Identification:** A table with two columns: 'Workgroup' and 'Workstation'. The table contains five rows of data:
 

Workgroup	Workstation
DSI	LALLEN
DSI	NMOELLER
DSI	SCOPAS
DSI	TFJELL
DSI	VREFRE

 To the right of the table are three buttons: 'Add', 'Delete', and 'Modify'.
- Lower Right Section:** Fields for 'Workgroup' and 'Workstation', and buttons for 'Cancel' and 'OK'.

At the bottom of the dialog are three buttons: 'Print', 'Cancel', and 'OK'.

The area in the lower right quarter of the screen is used to enter or modify information.

This close-up view shows the 'Workgroup' field with the text 'DSI' and the 'Workstation' field with the text 'NMOELLER'. Below these fields are 'Cancel' and 'OK' buttons. To the left, the 'Add', 'Delete', and 'Modify' buttons are visible.

Make the appropriate additions in the **Workgroup** and **Workstation** fields, then directly below the **Workstation** field, click on **OK** to save the entries.

## Delete

If a **Workstation** user identification has been eliminated, highlight a **Workstation** user identification in the **Workstation Identification** area of the screen, and then click on the **Delete** button in the center of the screen, to remove it.

**End User License Manager**

**Company Information:**

Name: asdf  
 Contact Name: asdf  
 Address #1: asdf  
 Address #2: asdf  
 City, State and Zip: asdf  
 Phone Number:

**License Information:**

Serial Number:  
 Number of Users: 10  
 Purchase Date: 01/25/2005  
 Purchase

**Workstation Identification:**

Workgroup	Workstation
DSI	LALLEN
DSI	NMDELLER
DSI	SCOPAS
DSI	TFJELL
DSI	VREFRE

Add  
 Delete  
 Modify

Workgroup:  
 Workstation:  
 Cancel OK

Print Cancel OK

Press **ENTER** or click on **Yes** to remove the **Workstation** user identification, alternatively, click on **No** to leave it as is.

**Delete Workstation**

Delete the following ?  
 Workgroup: DSI  
 Workstation: TFJELL

Yes No

# Modify

If a **Workstation** user identification has changed, highlight a **Workstation** user identification in the **Workstation Identification** area of the screen, and then click on the **Modify** button in the center of the screen, to correct it. To add a workstation, if less than the limit have been entered, click on the **Add** button. The area in the lower right quarter of the screen is used to enter or modify information.

The screenshot shows the 'End User License Manager' dialog box. It is divided into three main sections:

- Company Information:** Contains text boxes for Name, Contact Name, Address #1, Address #2, City, State and Zip, and Phone Number. All fields currently contain 'asdf'.
- License Information:** Contains text boxes for Serial Number, Number of Users (set to 10), and Purchase Date (set to 01/25/2005). A 'Purchase' button is located below these fields.
- Workstation Identification:** Contains a table with two columns: 'Workgroup' and 'Workstation'. The table lists five entries: (DSI, ADMINISTRATOR), (DSI, KLEE), (DSI, LALLEN), (DSI, NMOELLER), and (DSI, SCOPAS). To the right of the table are 'Add', 'Delete', and 'Modify' buttons. Below the table is a 'Print' button. To the right of the table is a form with 'Workgroup' (DSI) and 'Workstation' (DDAVEE) text boxes, and 'Cancel' and 'OK' buttons.

At the bottom of the dialog box, there are 'Cancel' and 'OK' buttons.

Make the appropriate modifications in the **Workgroup** and **Workstation** fields, then directly below the **Workstation** field, click on **OK** to save the changes.

# Print

To see a complete listing on paper of all the **Workstation Identification** information, click on the **Print** button located at the lower left corner of the screen.

**End User License Manager**

**Company Information:**

Name: asdf  
Contact Name: asdf  
Address #1: asdf  
Address #2: asdf  
City, State and Zip: asdf  
Phone Number:

**License Information:**

Serial Number:  
Number of Users: 10  
Purchase Date: 01/25/2005  
Purchase

**Workstation Identification:**

Workgroup	Workstation
DSI	ADMINISTRATOR
DSI	DDAVEE
DSI	KLEE
DSI	LALLEN
DSI	NMOELLER

Add  
Delete  
Modify

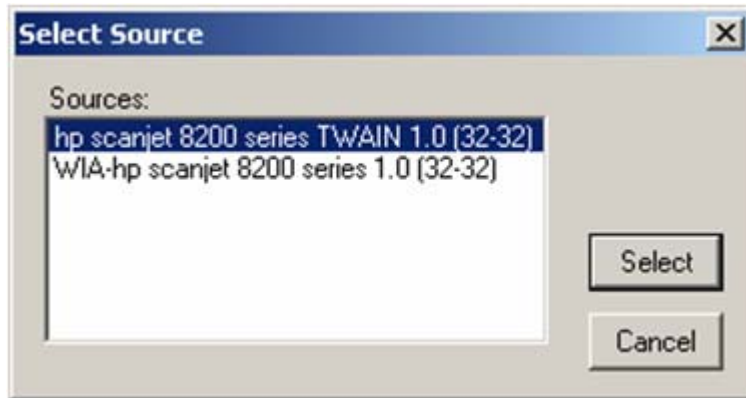
Workgroup:  
Workstation:  
Cancel OK

Print  
Cancel OK

## Scanner Setup

The **Select Source** dialogue box lists the scanners for which their respective scanning software has been installed on the computer.

Highlight the appropriate scanner, click on **Select** to have ERS use that scanner as the device for scanning documents into ERS, or click on **Cancel** to return to the ERS desktop.



## Change My Password

To change your password, type in a new password containing a least six (6) characters in the **Enter Password** field. Retype the new password in the **Confirm Password** field.

Click on the **OK** button to accept your new ERS password, or **Cancel** to abort the password change.

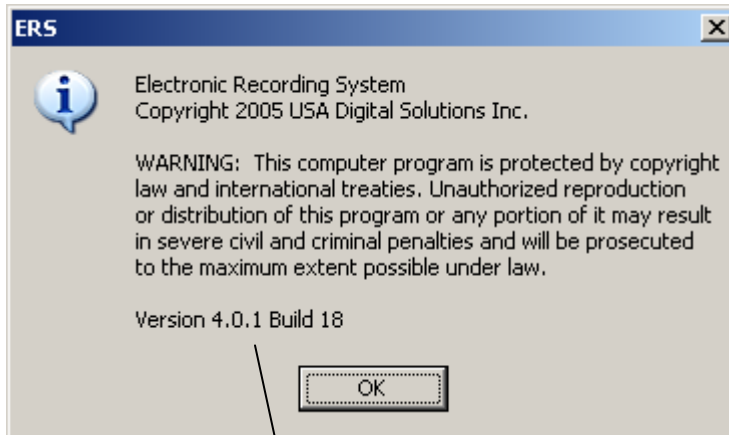


## Error Log

The **Error Log** opens a screen with a listing of critical errors that have occurred in the ERS.

# About Menu

To determine the ERS application version and build number, select this menu option. Please have this version number information available when calling the Help Desk for assistance.



Version number information

**NOTE:** The version and build number for each USA Digital Solutions product may be unique, for example, the Escrow module may not be the same version as the ERS application.