Electronic Recording System
# Systems Administration Manual

Table of Contents

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;
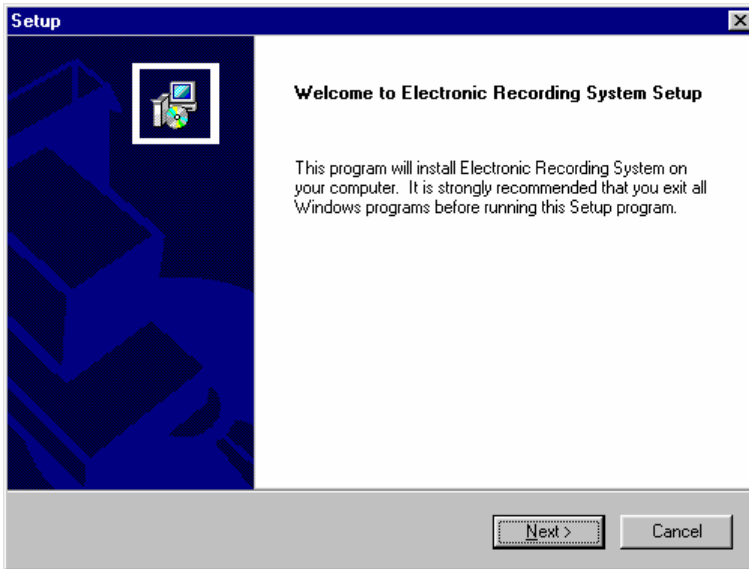
Press the Next button to continue or press Cancel to exit.
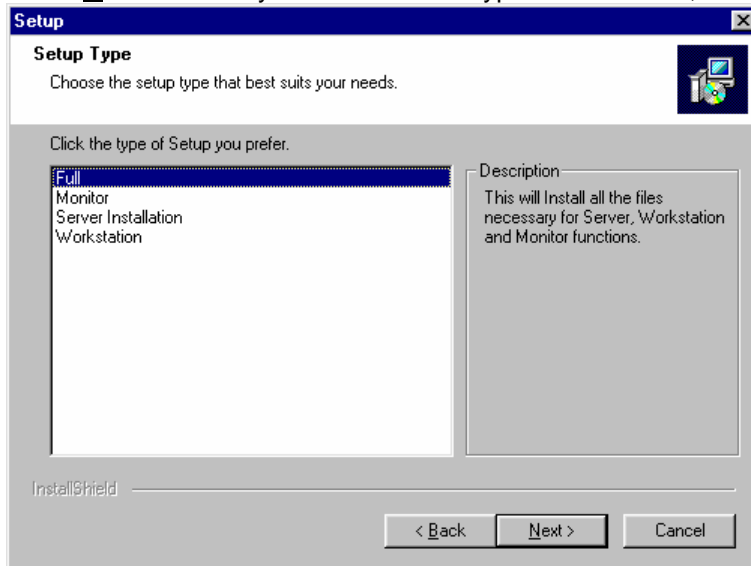
Pressing Next will allow you to pick where you want the system installed;
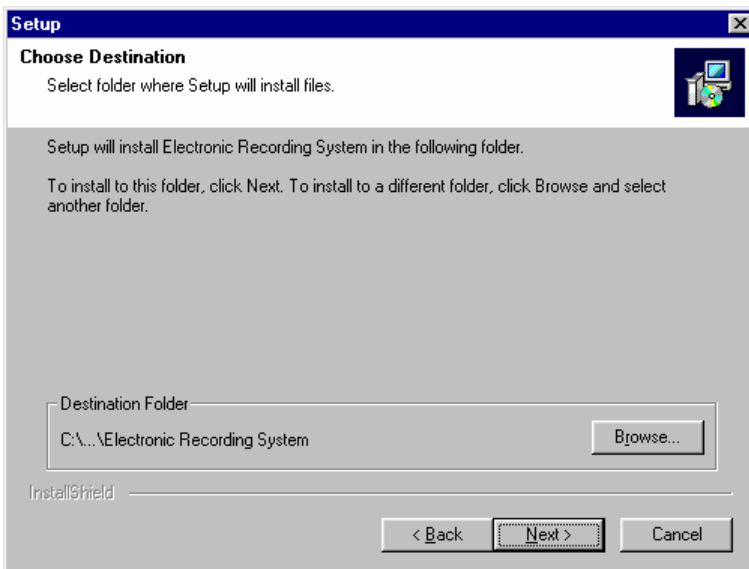
You can change the destination folder but we recommend that you leave it a the default.

Press the Next button to continue, Back 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.

Click the type of Setup you prefer.

Full
Monitor
Server Installation
Workstation

Description

This will Install all the files
necessary for Server, Workstation
and Monitor functions.

InstallShield

< Back   Next >   Cancel

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

Select the type of installation and press the Next button to continue or Back to go back to the previous screen or Cancel to exit the installation.

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

Setup

Electronic Recording

Please specify the path to the Ers database.

Path   [   ]

InstallShield

< Back   Next >   Cancel

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 Next button to continue, Back to go back to the previous screen or Cancel to exit the installation.
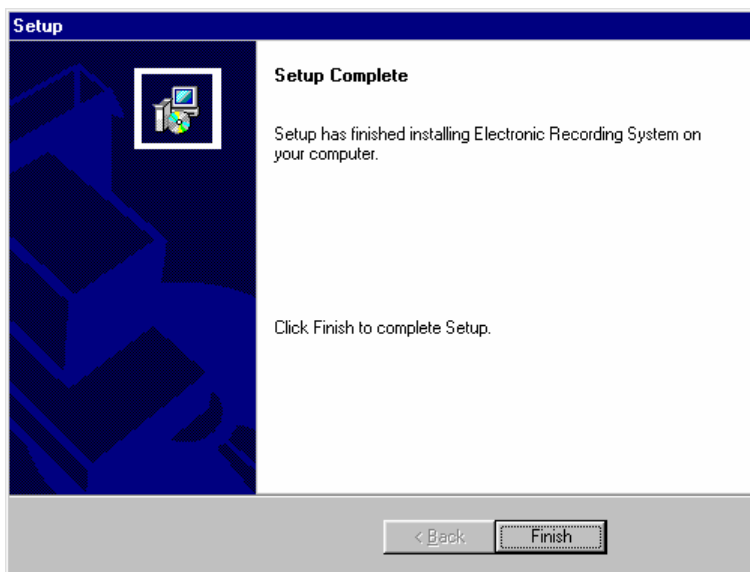
Pressing <u>N</u>ext will show you what options you have selected.
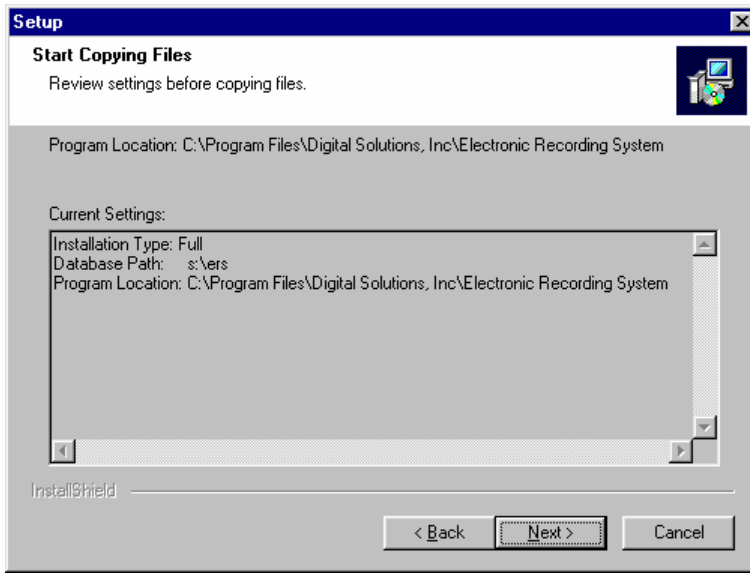
If the options are correct you can press

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>N</u>ext will start the installation, when finished the following will be displayed.

Press Finish and your done.

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

Electronic Recordi...

This is for the scanning of documents

Monitor ERS

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 Tools,Options or you can click on the ⊕ button on the tool bar. This will display the options screen as follows;
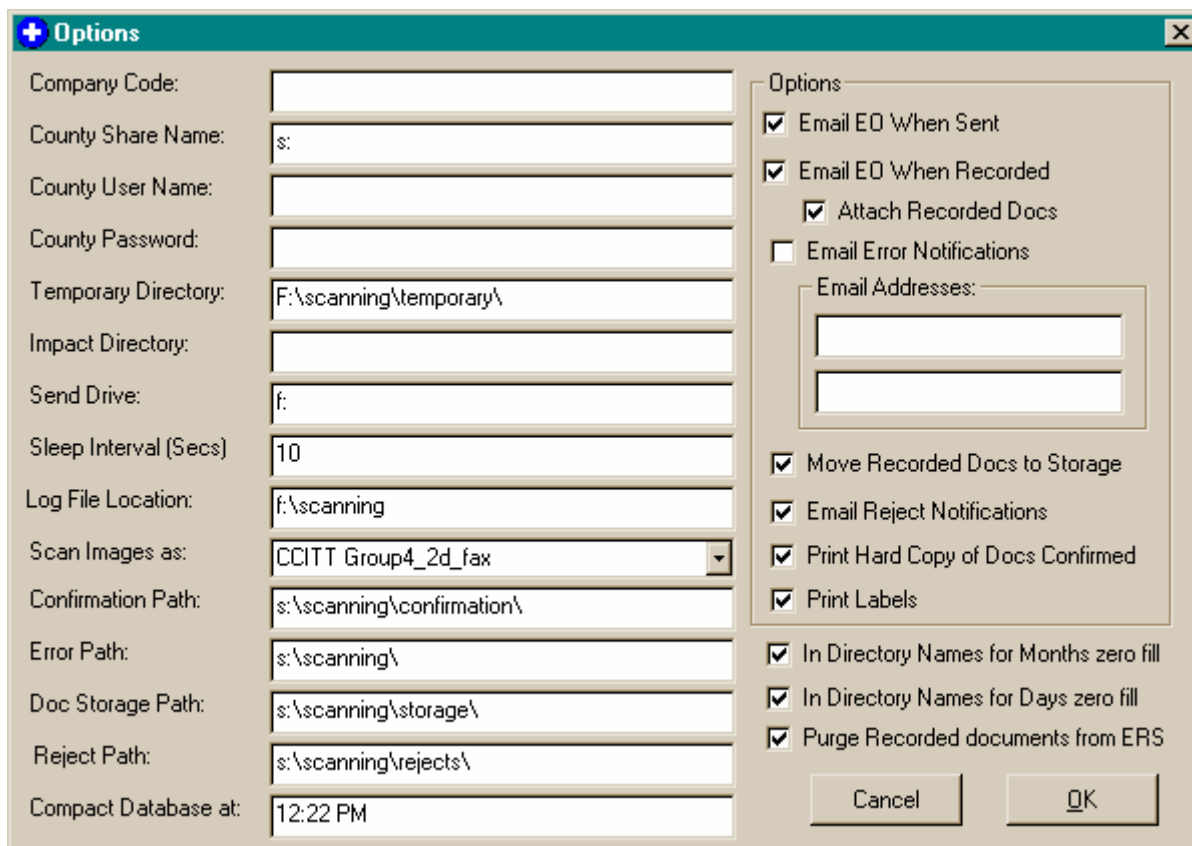
Each of the above options is explained below;

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.

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 **must** 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. *Note: if the system is configured to email reject notifications once the email has been sent the file is deleted from this folder.*
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. *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.*

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 docs confirmed
> Check this to have the system automatically print copies of the recorded documents.

Print Labels	Check this to have the system print labels. *Note: you must have a dot matrix printer attached to computer running the monitor program. The printer should be called "Labels".*

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

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. (*Note: in order for the escrow officer to be able to see or print a recorded document they must have Windows imaging installed on their system.*)

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 Tools; License Manager. *Note: you must be login in to ERS with administrator access.*
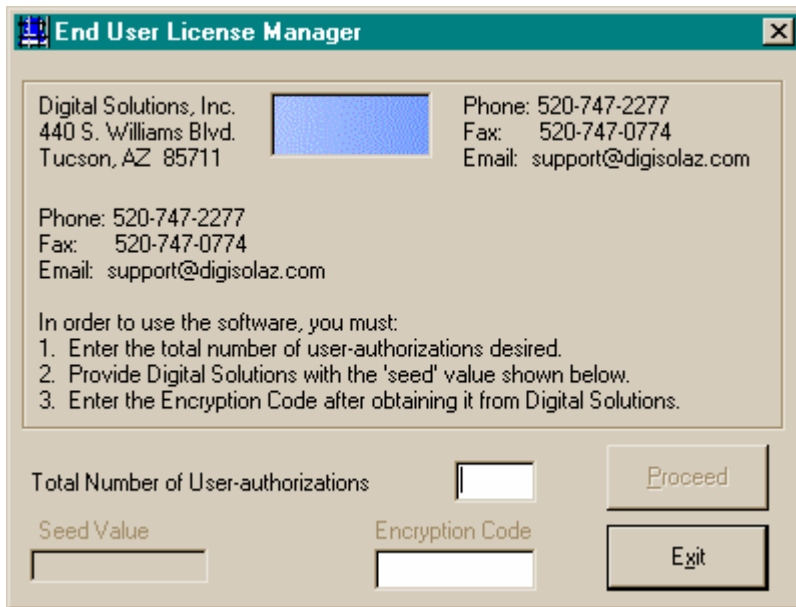

Your company information should have been filled out when the ERS system was first installed but now is a good time to check it and make any corrections needed.

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 Purchase button and this will display the following;

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 Proceed. 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 Add 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 OK. 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 OK button at the lower right of the screen.

Password Maintenance:

Login to the ERS scanning program and select Tools; Passwords. *Note: you must be logged in to ERS with administrator access.*
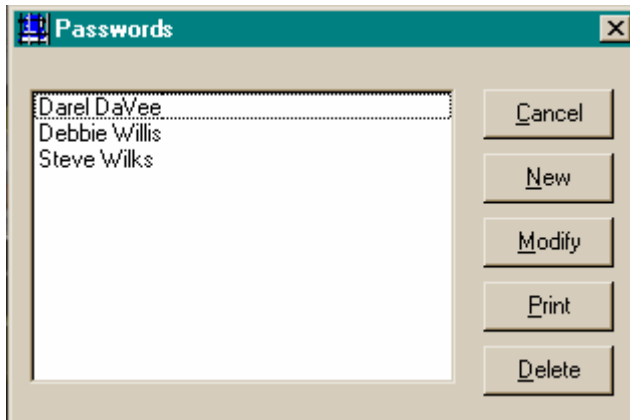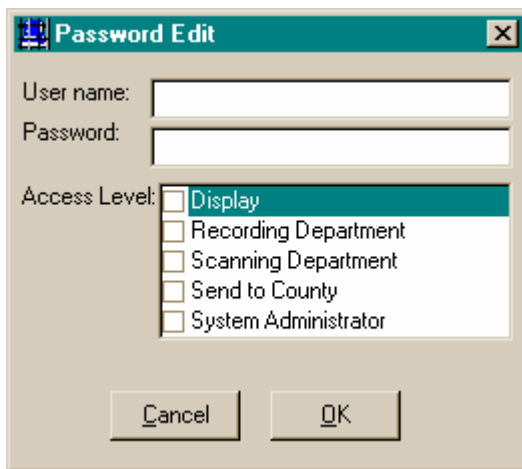

You have the following options;

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 New button, this will display the Password Edit screen;

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.

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 Modify button, this will display the Password Edit screen;

This will be the name of the user you selected

This will be the password of the user you selected.

This will show the access level of the user you selected.

Make any corrections as necessary and press the OK button when done or Press the Cancel button.

Deleting A User:

From the Passwords screen select a the user you wish to delete, then press the Delete button.
You will be asked to confirm whether you wish to delete this user. Press Yes to delete them or press No to not delete them.

Printing the Passwords:

From the Passwords screen press the Print Button, this will display a Crystal Reports© Print preview window as follows;
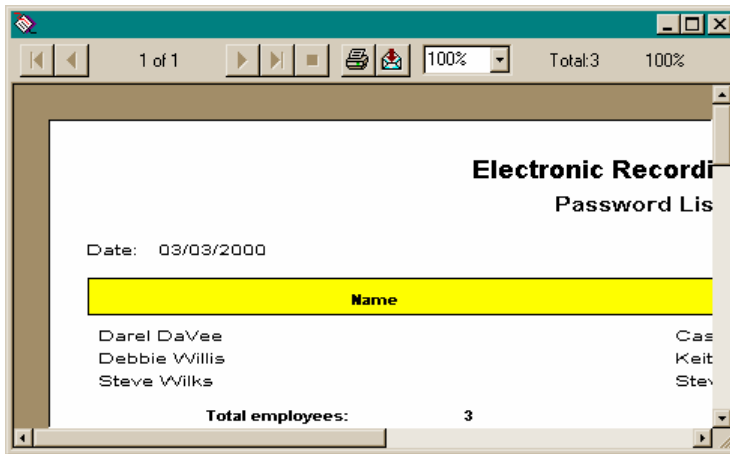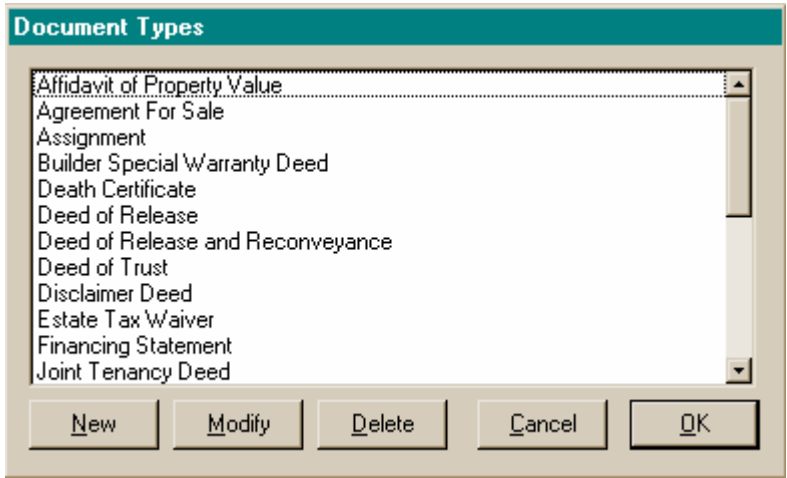

To print the report press the 🖨 icon.
To maximize the preview window click on the Maximize ☐ button.

Document Types Maintenance

The document types are displayed in the Document Type pull down on the scanning screen.
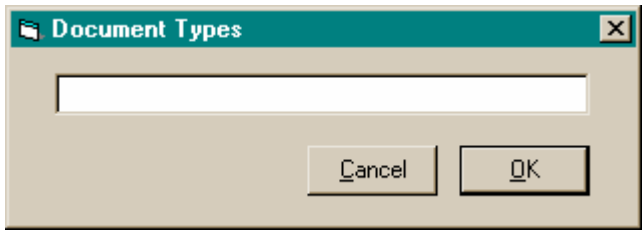
From the Desktop select <u>T</u>ools; <u>D</u>ocument Types. The following will be displayed.

Shows all the document types currently available.

Adding a New Document Type:
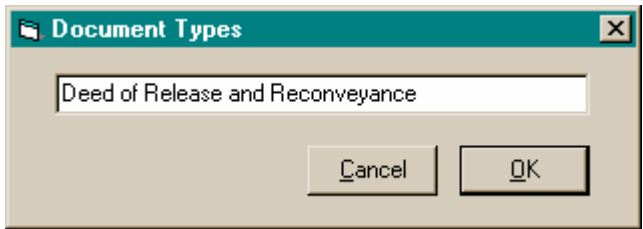
To add a New document select <u>N</u>ew;

Enter the document description and press <u>O</u>K to add it to the list or press <u>C</u>ancel 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;
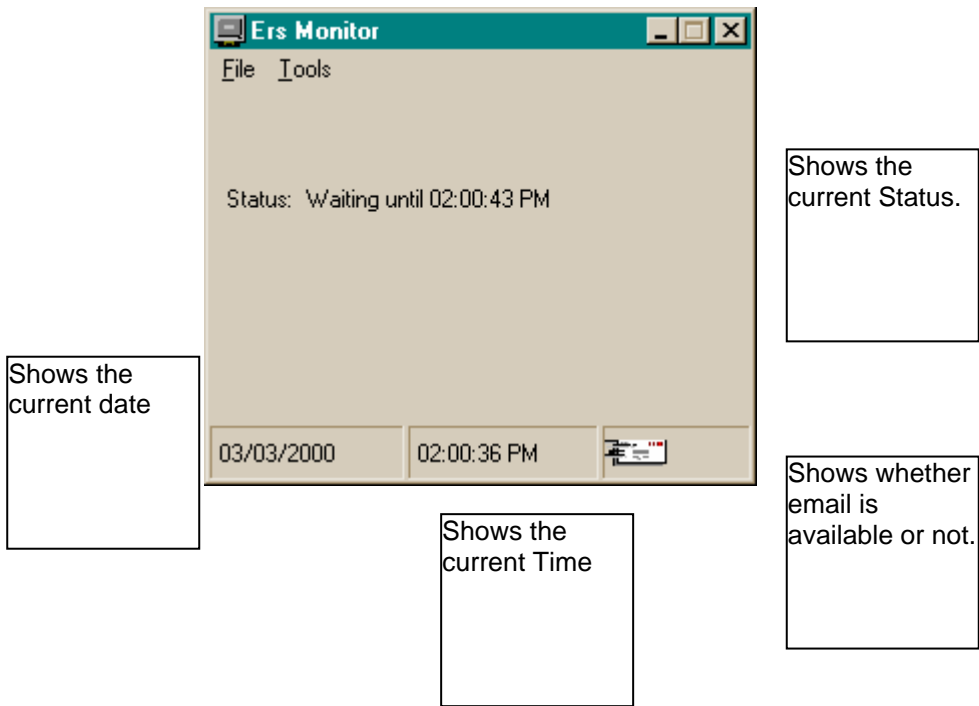

Now you can change the description, when finished press <u>O</u>K to save your changes and return you to the document type list or press <u>C</u>ancel to not make a change and return you to the list.

Deleting a Document Type:

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

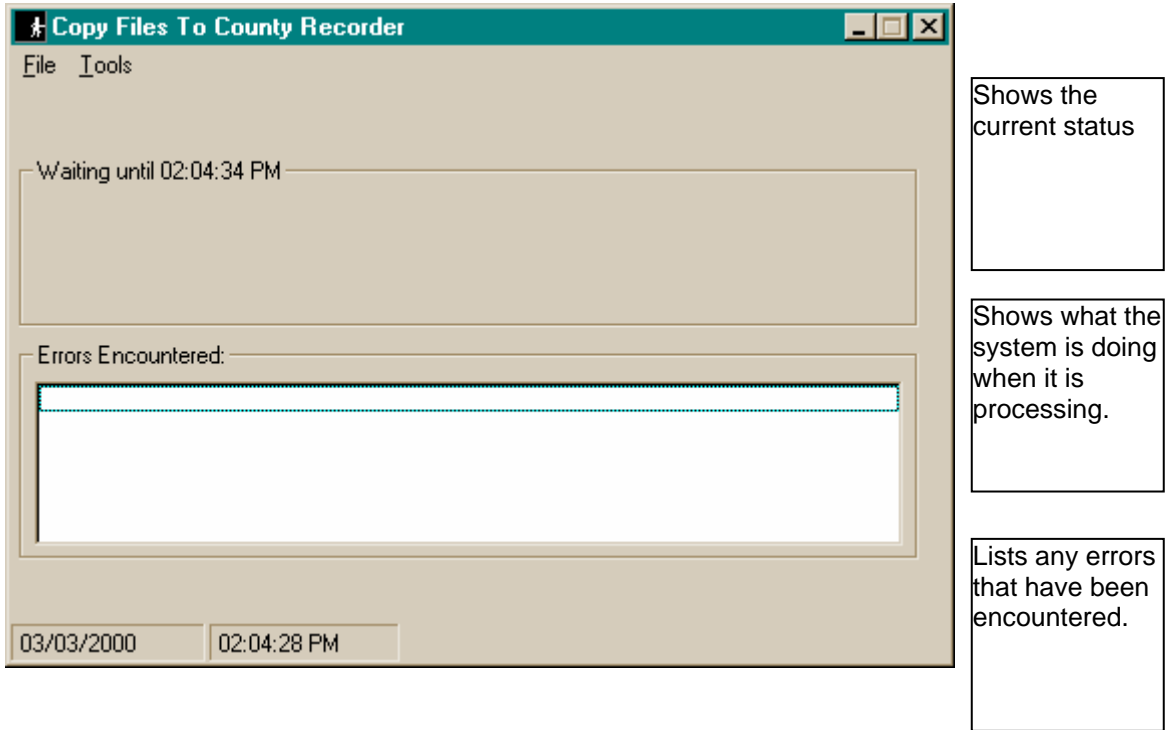When maximized the Monitor module looks like this;

Shows the
current Status.

Shows the
current date

Shows whether
email is
available or not.

Shows the
current Time

You have the following options;

File   Has only one option under it called Exit.
Tools Has only one option under it called Options which allows you to configure the system.
          (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;

Shows the current status

Shows what the system is doing when it is processing.

Lists any errors that have been encountered.

You have the following options;

File   Has only one option under it called Exit.
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*)