

Electronic Recording System User Manual

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Getting Started:

On your windows desktop locate the Icon that looks like this;



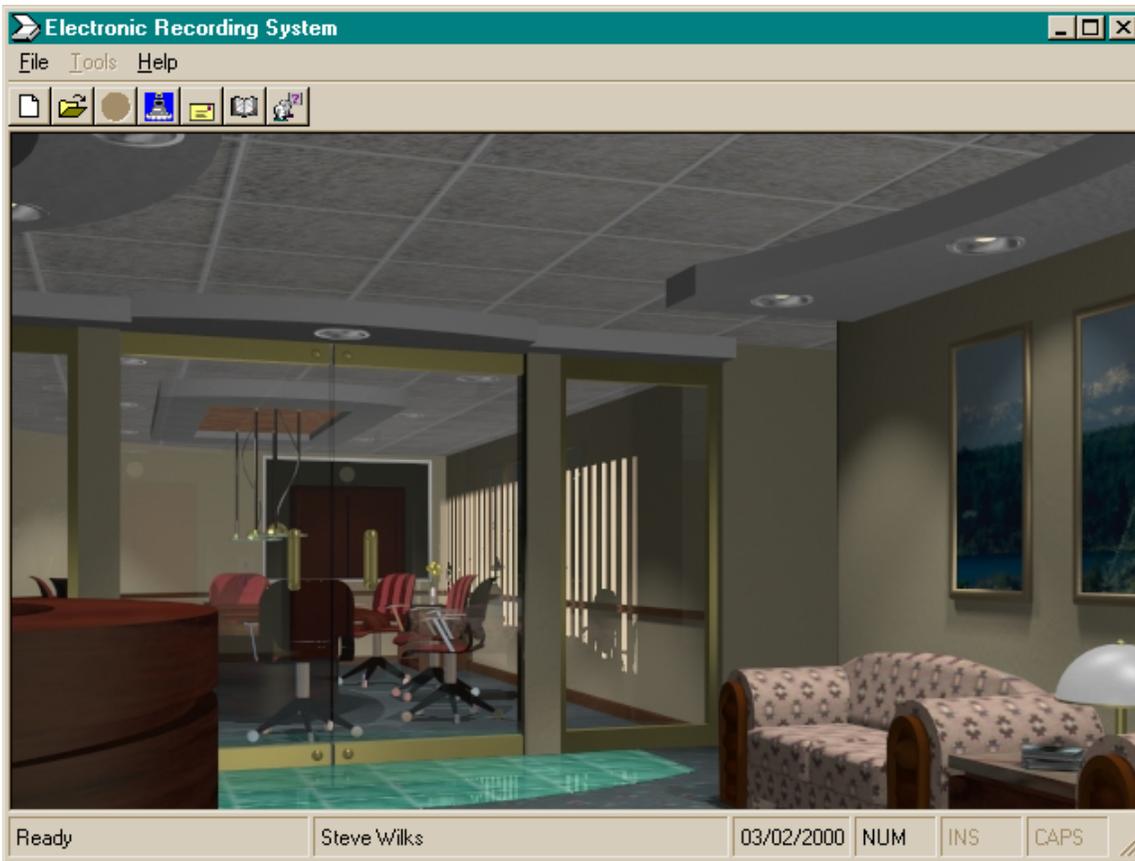
Now double click on it, this will launch the **Electronic Recording System** program;



Enter your name and then press the tab key.
Now enter your password. *Note: as you type you will notice asterisks * appearing instead of the letters you are typing, this is okay.*
Press enter or click on the OK button.

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Once you have successfully signed in you will see ERS Desktop;



Access the queues display

Access the ERS email address book.

Manually send email notifications to escrow.

Opens a new order for scanning documents.

Current Status

Your Name or the persons name who is currently signed on.

Opens an existing file so that you can add documents or rescan all documents.

Sends files to the County Recorders Office

Menu options are as follows;

File:

- New Opens a new file or an existing file for scanning documents
- Open Opens an existing file so you can view the documents that were scanned.
- Exit Exits the ERS program and returns you to your desktop.

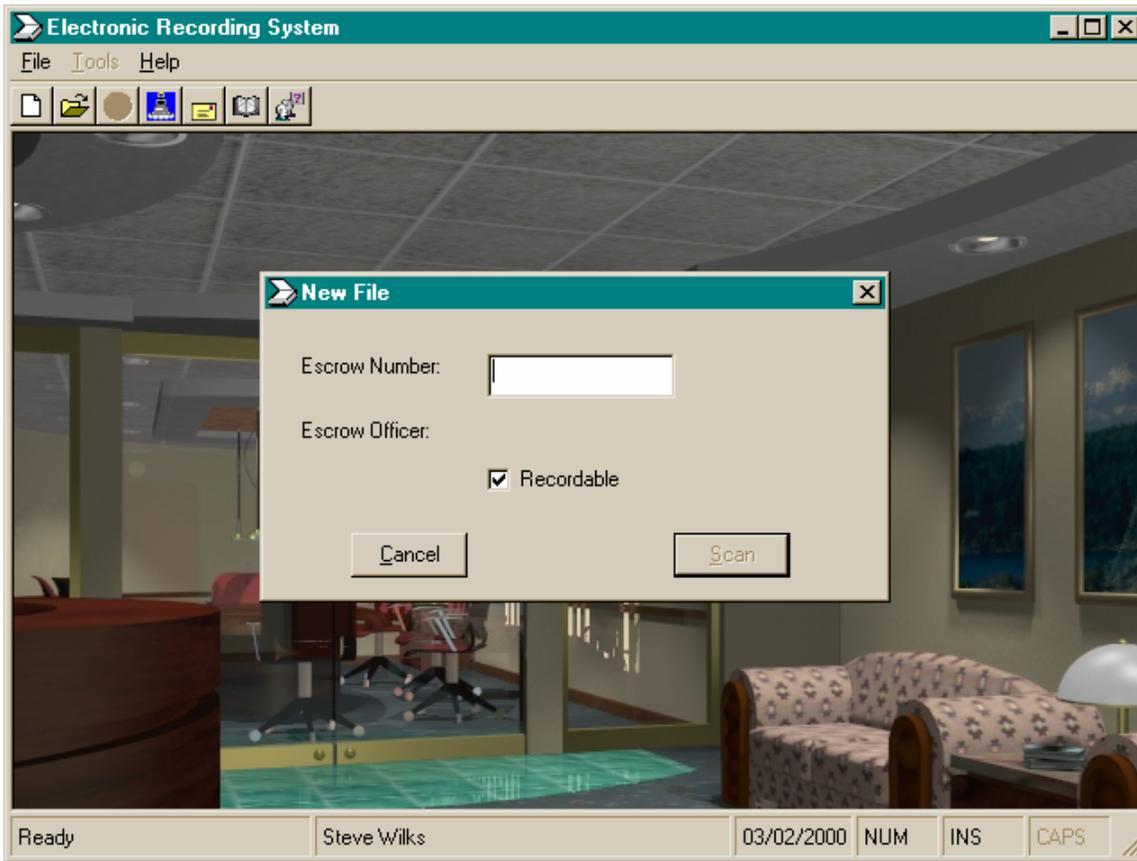
Help:

- About Displays the about screen.

Note: depending on your access level not all of the options explained later may be available to you.

Entering a New File:

Click on the toolbar button  or do File; New, the following will be displayed.

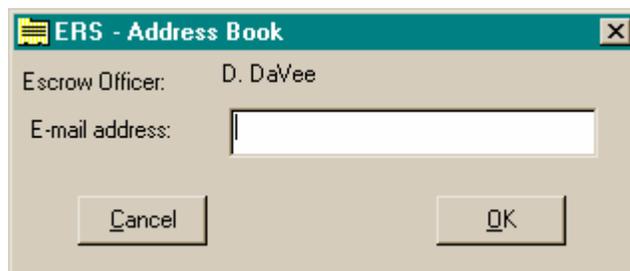


Now enter your file number and press the TAB key;

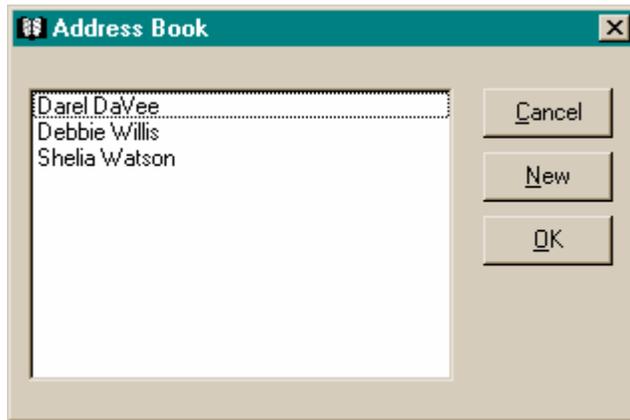
If your system is configured for integration with Impact/32© then the escrow officer name will be displayed otherwise the escrow officer name will be blank.

Now press the scan button.

If your system is configured for integration with Impact/32© the system will verify if an email address exists in the address book for the escrow officer. If the address does not exist the address book will be displayed allowing you to enter the email address.

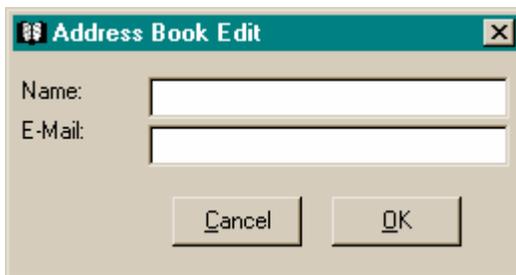


If your system is not configured for integration with Impact/32© then the address book will be displayed so that you can pick a name.



Shows all the names in the address book.

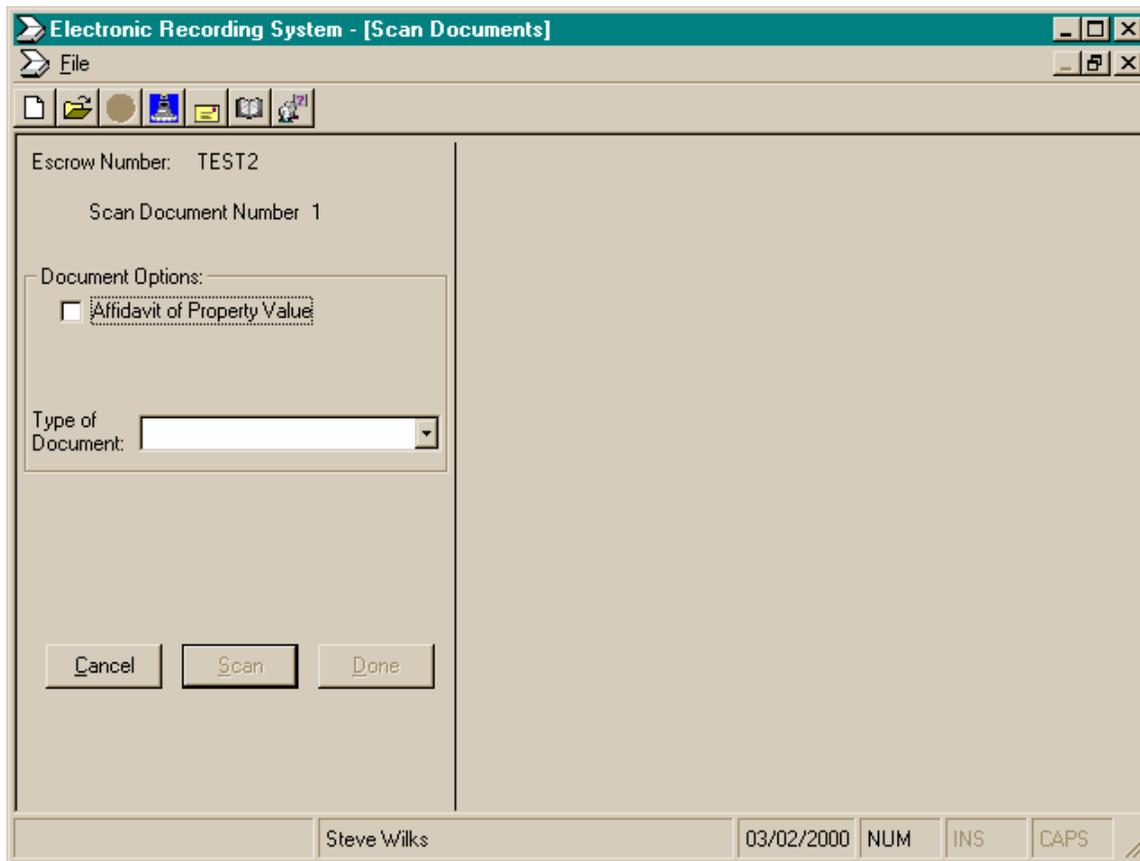
Select a name and press the OK button.
To cancel without selecting a name press the Cancel button. The system will ask you if you wish to exit.
To add a new name to the list then press the New button;



Enter the name and e-mail address and press OK when done.

Scanning a document:

Once you have entered your file number and setup the email address if needed the scanning screen is displayed;



Select the document options. If the document is an affidavit of Property Value you can check the Affidavit of Property Value box which will automatically set the type of document to Affidavit of Property Value.

You can select the type of document by clicking on the type of document pull down or you can simply type the description or title of the document in the type of document pull down.

When you have entered the type of document you can press the Scan button, this will display your scanners setup page; select you options and press the Scan button, this will begin the scanning.

When the scanner has scanned all the pages of the document you will be returned to the Scan Documents Screen. The right side of the screen will show you thumbnail shots of each of the pages you have scanned.

Now that the document has been scanned you have several options;

Deleting a page:

First click on the page to be deleted and then do a right mouse click, this will display the options menu, now select Delete. You will be asked to confirm the deletion of this page. Press Yes to delete it or Press No to return to the thumbnail view.

Rotating a page:

First click on the page to be rotated, then do a right mouse click or press the rotate button; each time you select rotate, the document page is rotated 90 degrees.

Viewing a single page:

Left click on the page you want to view, this will change the display from thumbnail to page view. If you need to change the zoom factor (to increase or decrease the size of the image) click on the Zoom Factor pull down at the top of the page. You can also rotate the page by following the **Rotating a page_** instructions above. When you are through simply left click on the page and you will be returned to the thumbnail view.

Rescanning the document:

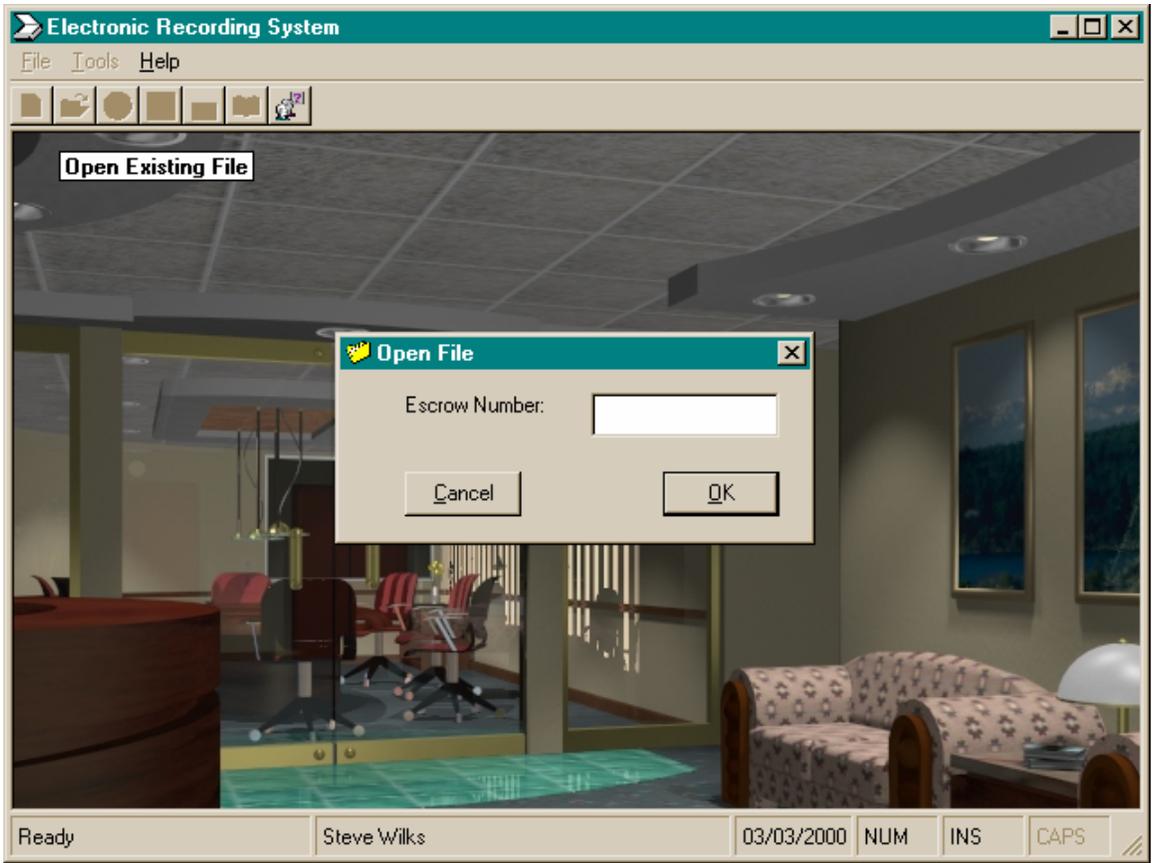
If you need to rescan the document, you can press the Rescan button.

If the document is scanned to your satisfaction press the OK button, this will save the scanned document and allow you to scan another document on the current file. If you are through scanning for this file press the Done button. This will save all the documents on this file in the database and return you the file selection screen.

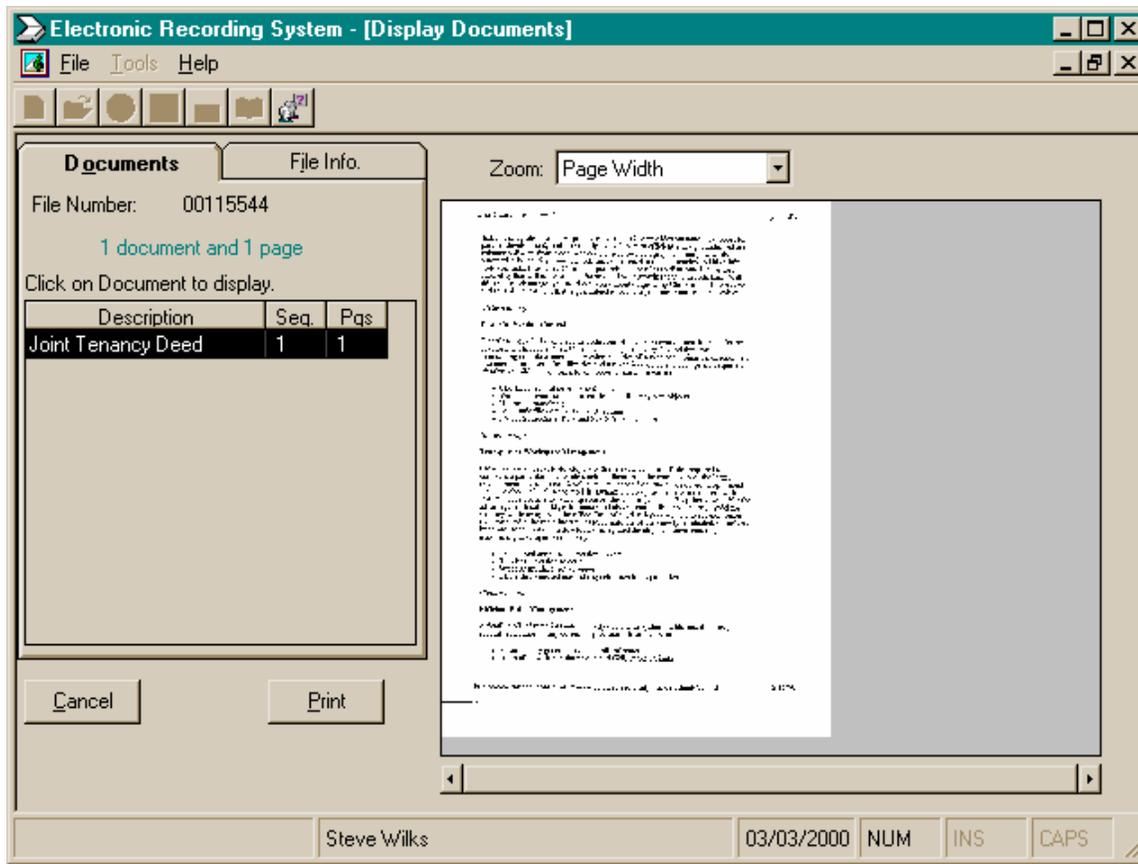
Note: All scanned documents are placed in the scanned queue. These documents will then need to be reviewed and when approved they need to be moved to the Send to County folder before they will be sent to the County Recorders Office.

Opening an existing file:

To access a file that has been scanned but not yet recorded by the County Recorders Office, you need to return to the desktop and select either File; Open or click on the  button on the toolbar.



Enter the escrow number and press enter or click on OK.
This will display the Display Documents screen;



Allows you to change the display size of the document.

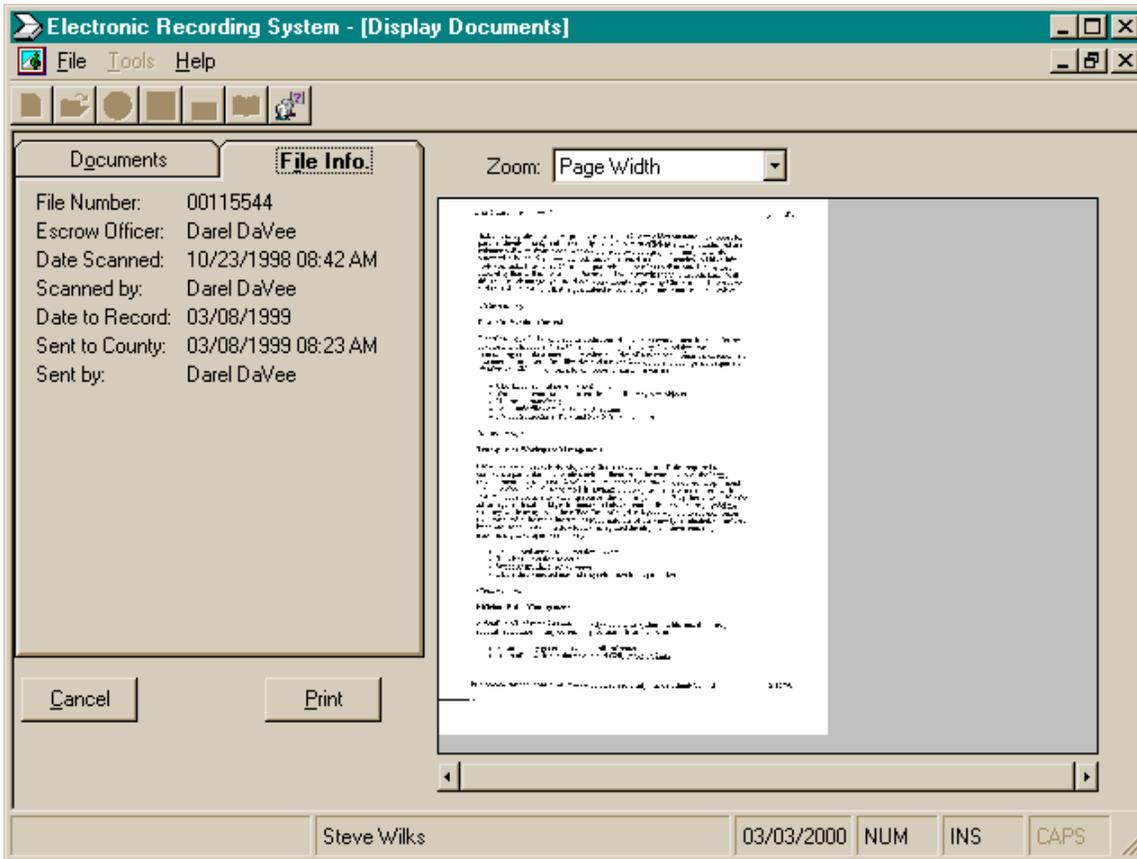
This displays either a thumbnail view or a single page.

Returns you to the desktop.

List of all the documents scanned on this file.

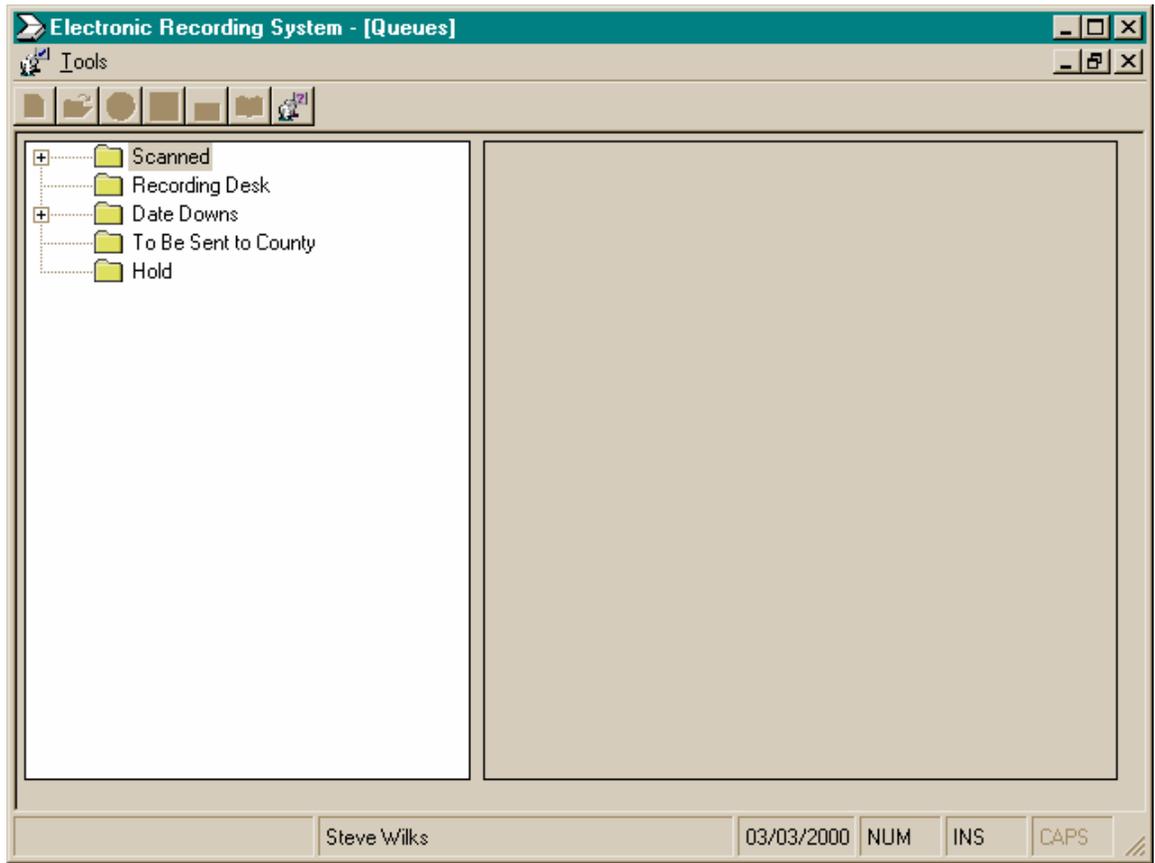
Prints the selected document.

To see additional information about the file you can click on the File Info tab.



Queues:

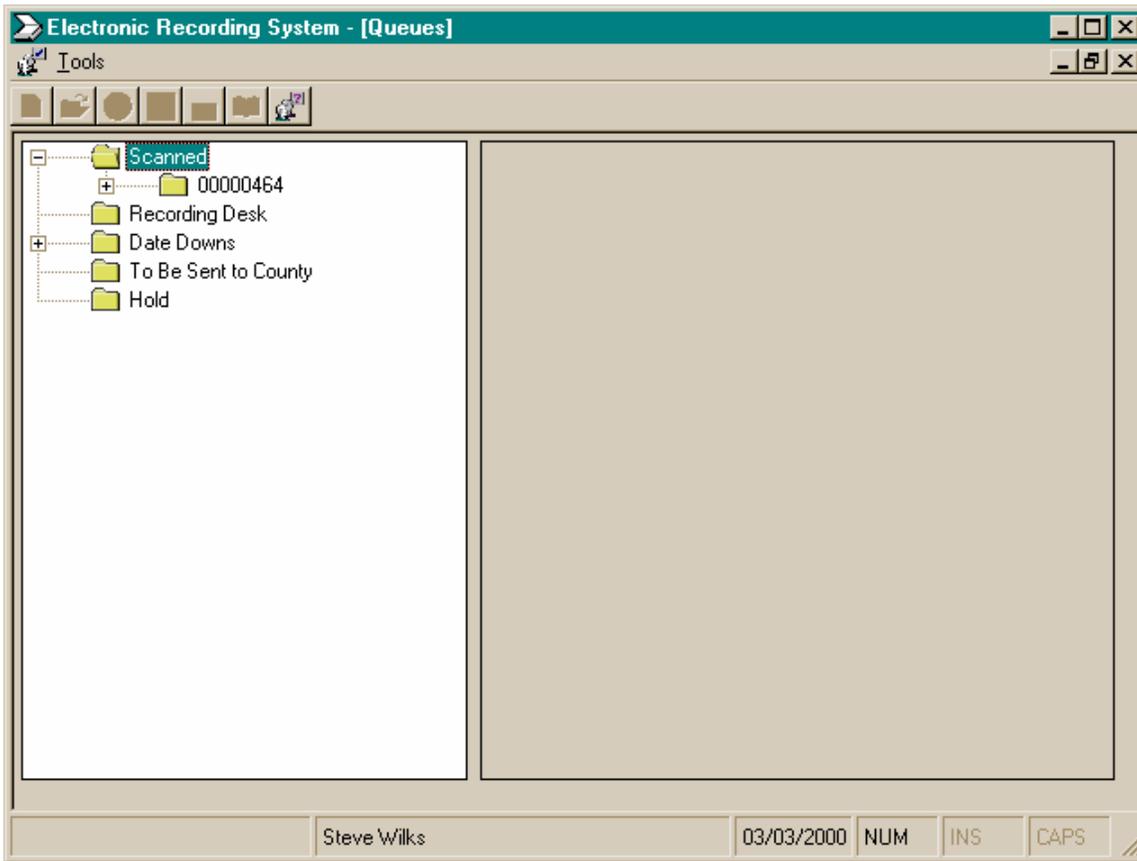
To see the queues make sure that you are at the ERS desktop and click the  button on the toolbar.



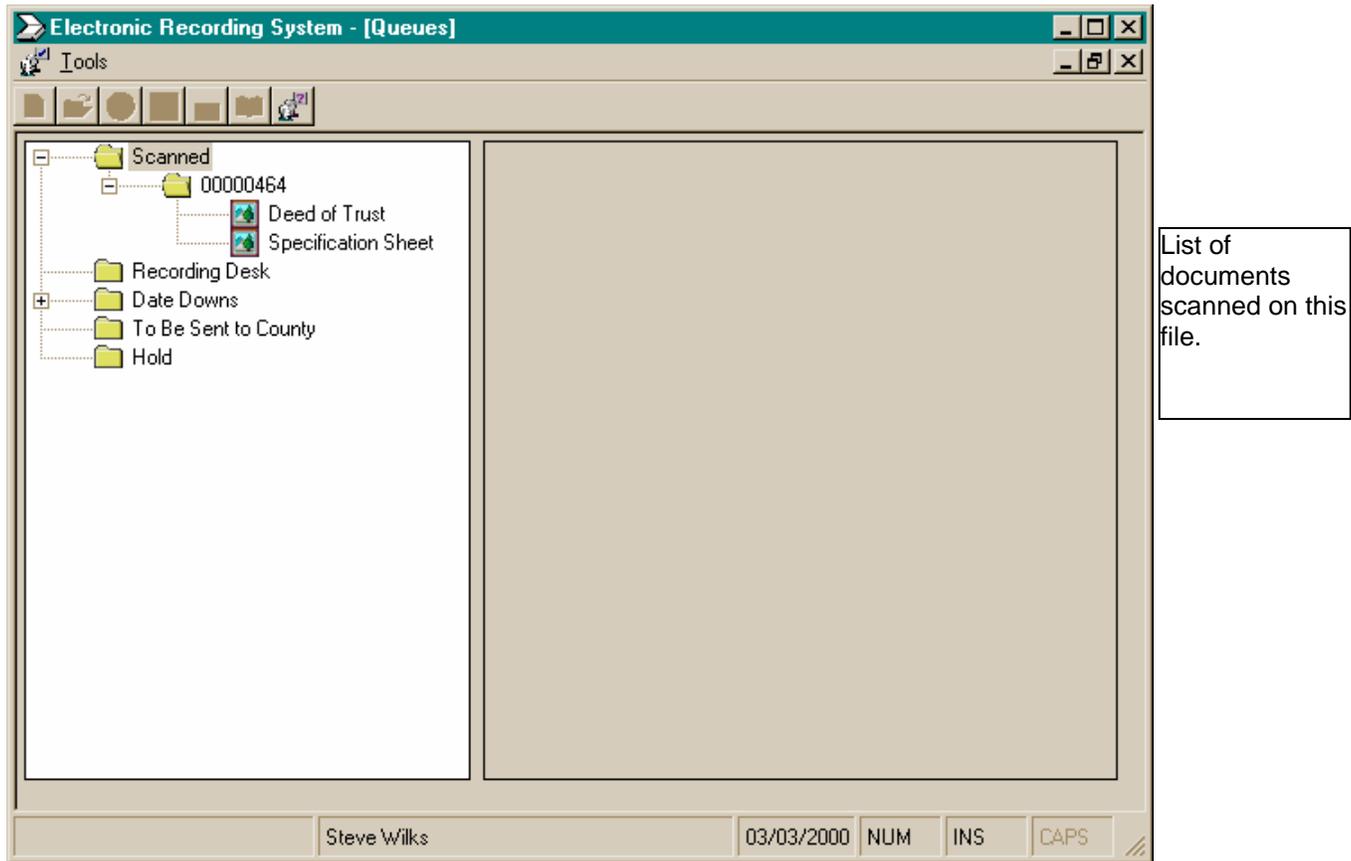
This is a list of the queues.

This displays additional information.

If a plus sign (+) is next to the name of a queue you can click on the + and that queue will be expanded to show you what files are in the queue. In the above example if we click on the + next to Scanned this is what we see;

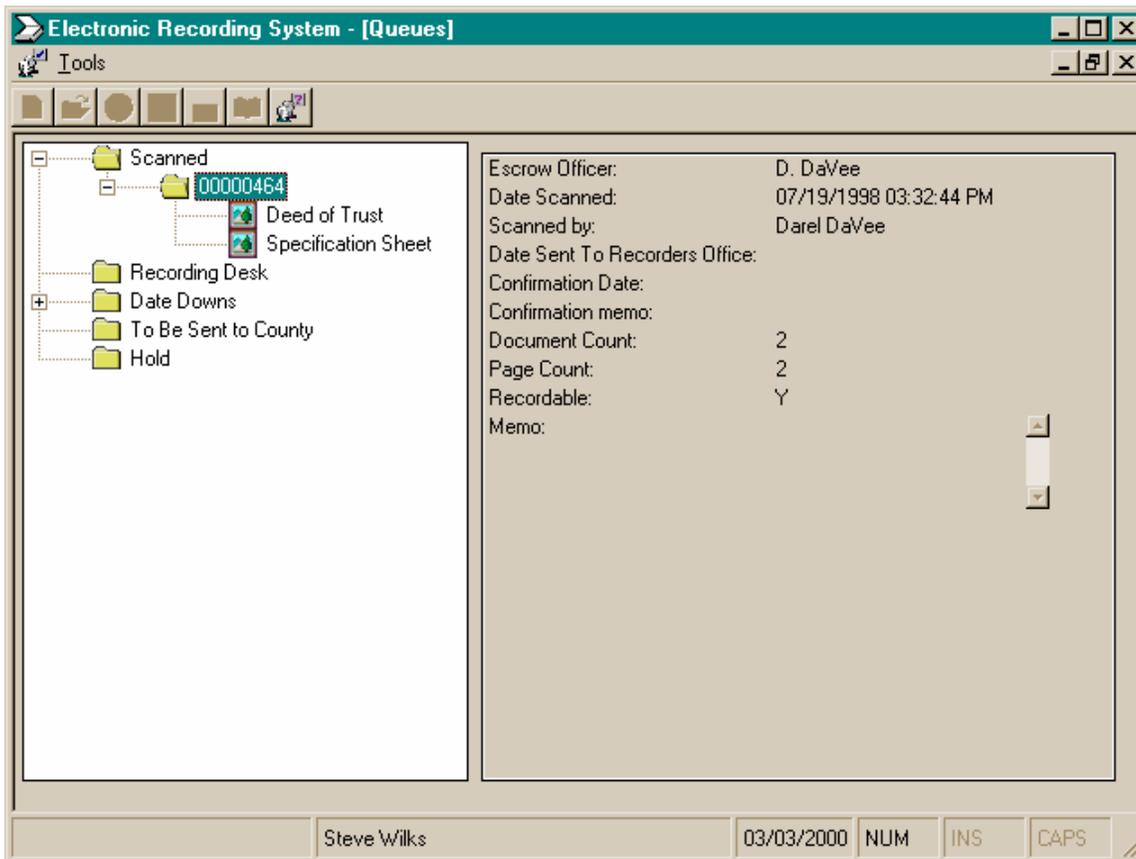


Now it shows us that file number 00000404 has been scanned. Note that there is plus (+) sign next to 00000404, if we click on the plus sign we will see a list of the documents that have been scanned on this file;

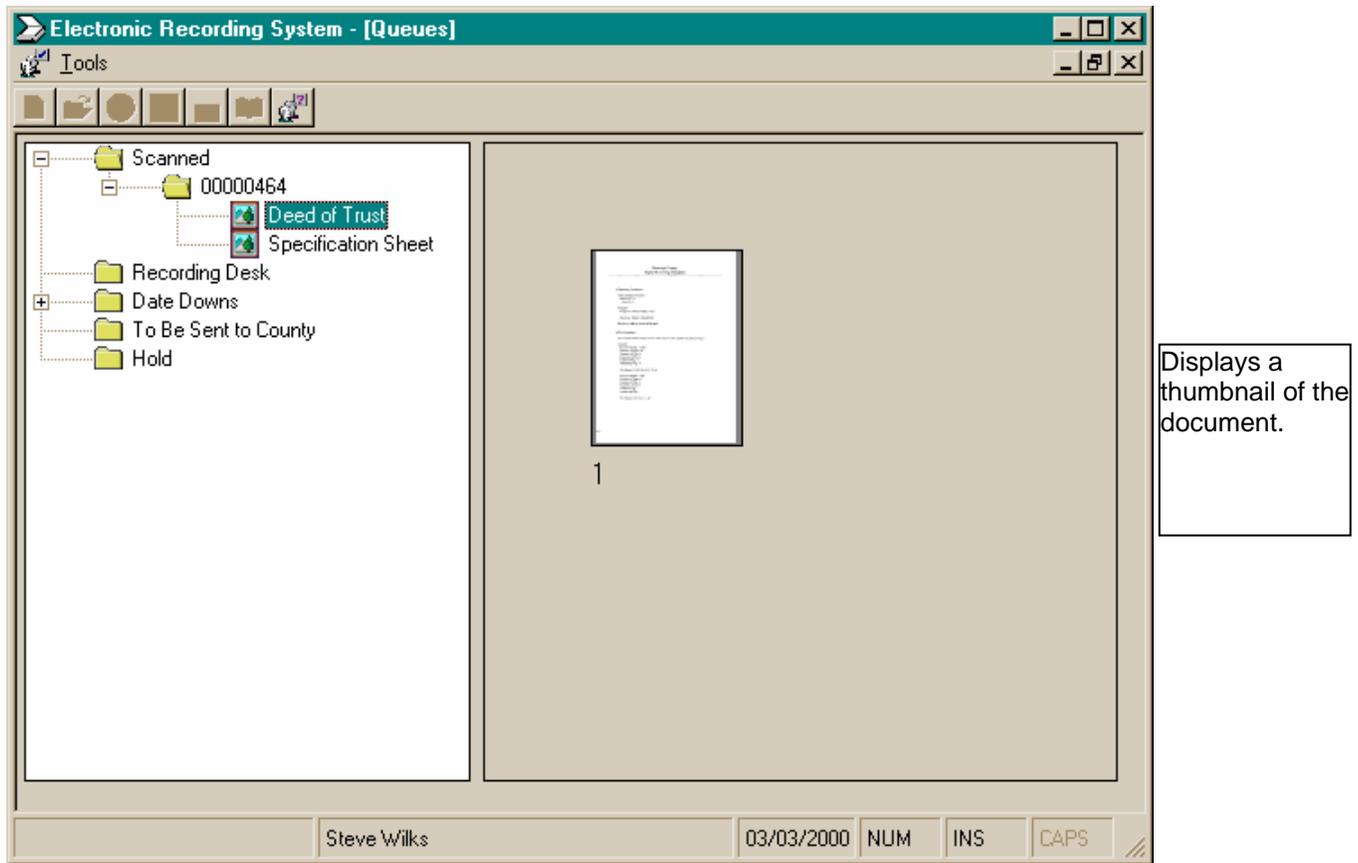


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If we want to see information on the file itself we can left mouse click on the folder titled 00000464 and the information will be displayed;



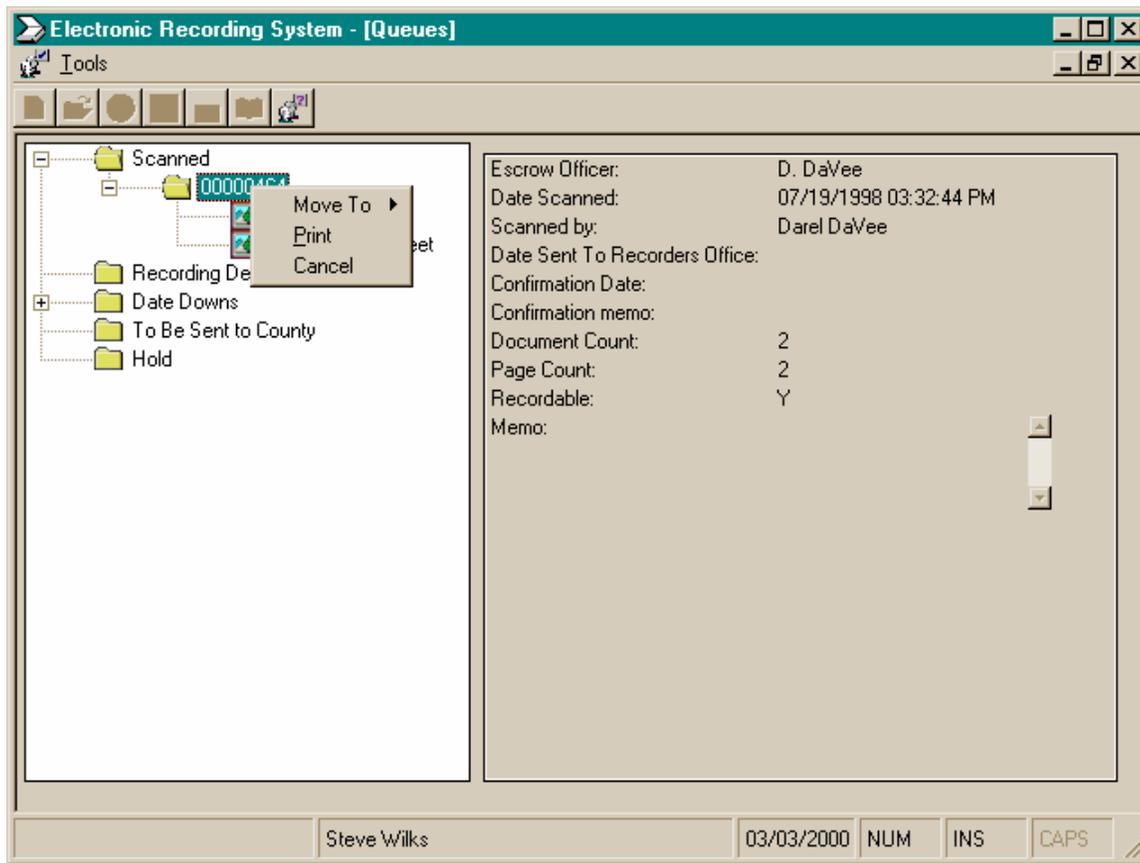
If we want to see a document that has been scanned we can click on the title of the document;



If the you want to view a single page simply left click on the page and it will be enlarged, to return to the thumbnail view click on the page.

Moving a File to another Queue:

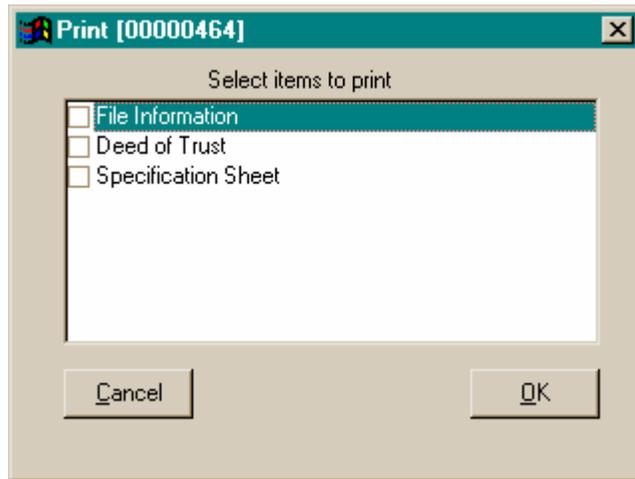
If you would like to move a file to another queue simply right click on the file number and the options menu will be displayed;



Select Move To, then click on the queue you wish to move the file to. If you select the Hold queue you will be asked to supply a reason that the file is being placed on hold.

Printing a file:

If you wish to print right click on the file number and select print this will display the following;



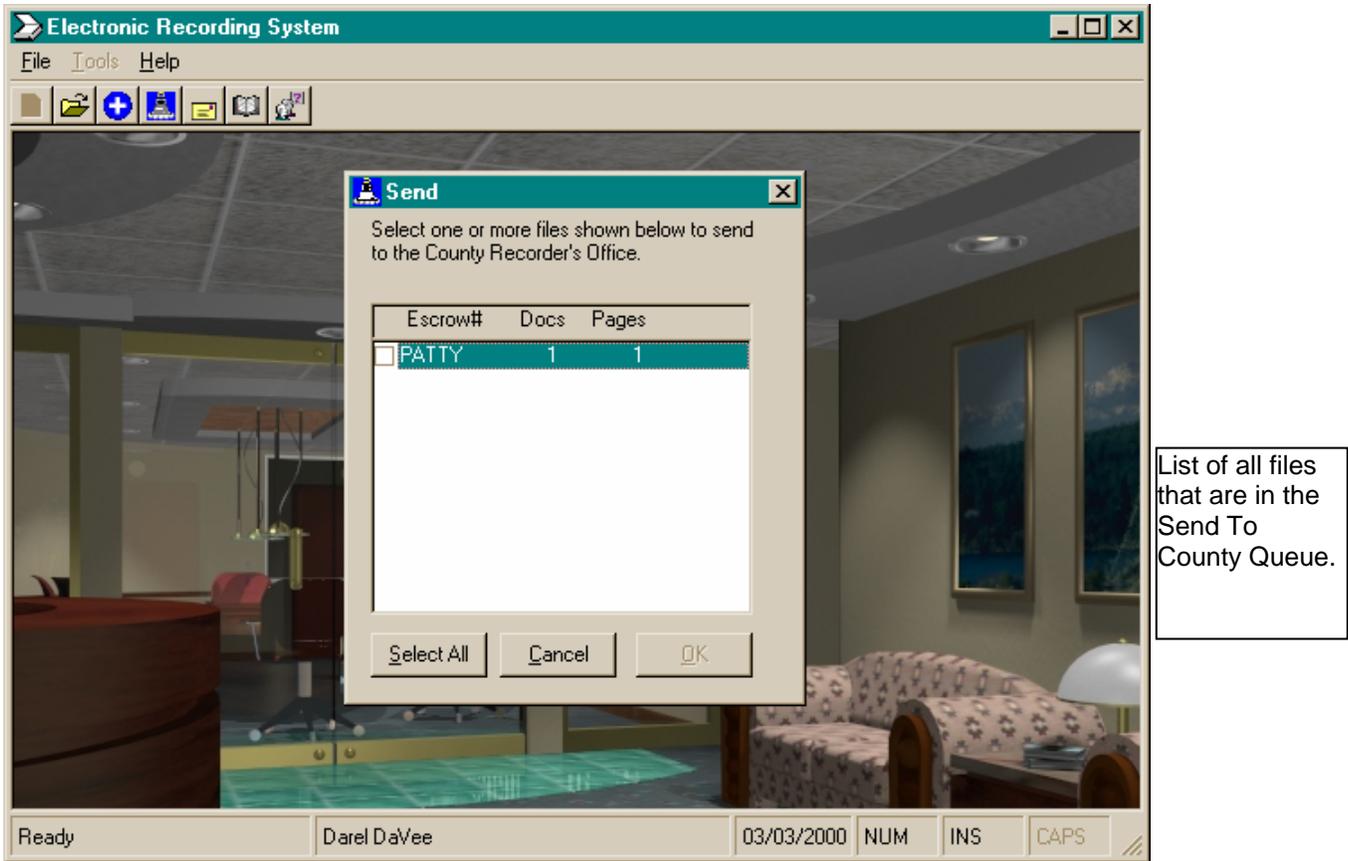
Left click on each item you wish to print and then press the OK button.

Refreshing the queues:

The queue display is refreshed automatically at 1 minute intervals however you can press the F5 key to refresh the display at any time.

Sending files to the County Recorders Office:

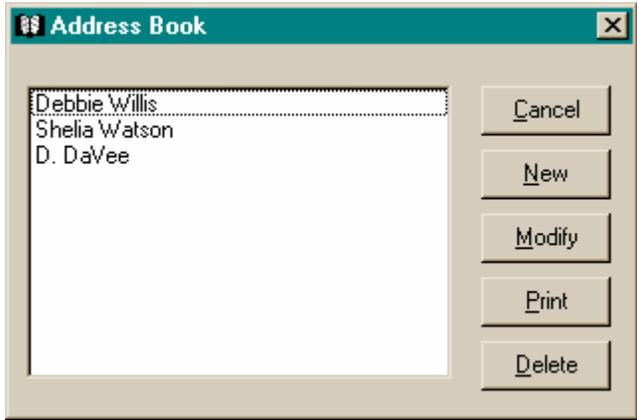
When you are ready to send the files that are in the "To be sent to County" queue then click on the  button on the toolbar, this will display the Send screen as follows;



To select a file simply left click on the file number, to not select a file left click again. To select all the files press the Select All button. When you have selected the files to send press the OK button. After a few minutes depending on the number of files being sent the system will display "Send Complete", press OK and you will be returned to the desktop.

Address Book:

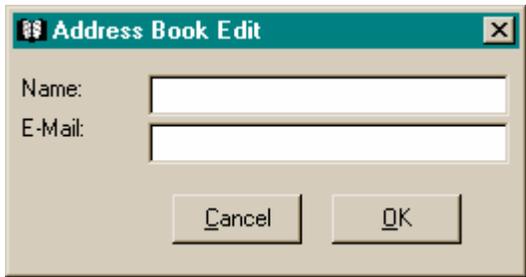
To access the address book click on the  button on the tool bar, this will display the address book.



- Cancel** Returns you to the desktop.
- New** Allows you to enter new names and email addresses.
- Modify** Allows you to modify the selected name entry.
- Print** Prints the address book.
- Delete** Deletes the selected name.

Adding a new name:

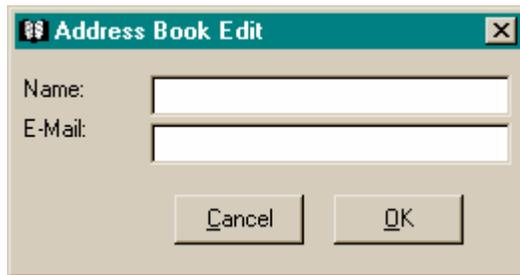
To add a new name press the New button, this will display the following;



Enter the name and e-mail address then press OK to add the name or Cancel to cancel the entry. You will be returned to the address book screen.

Modifying a Name:

To modify a name first select it by clicking on the name then press the Modify button, this will display the following screen;



This will be the name you selected.

This will be the email address of the name you selected.

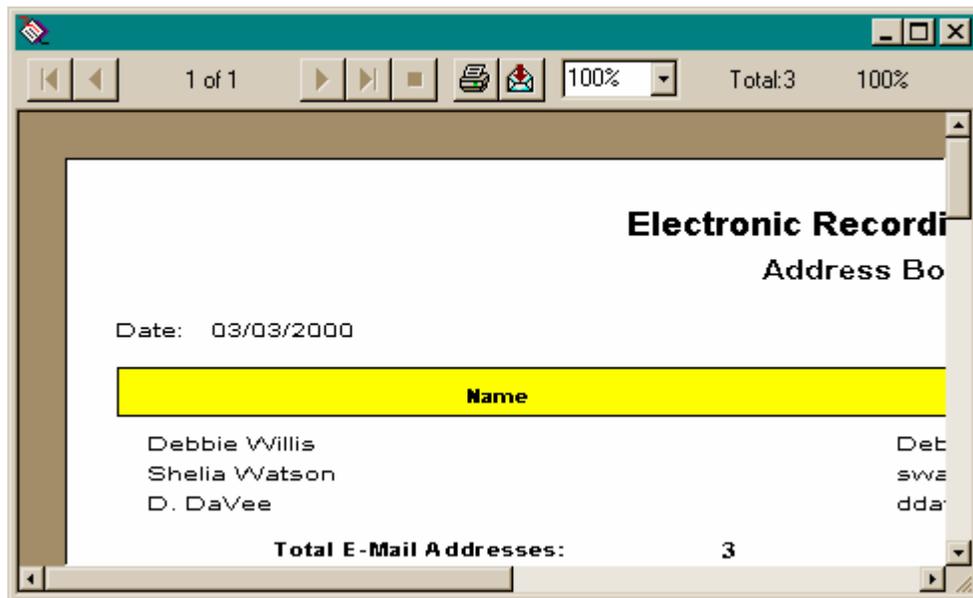
Make your changes then press OK to save them or press Cancel to cancel you changes. You will be returned to the address book screen.

Deleting a Name:

To delete a name first select the name, then press the Delete button. You will then be asked to confirm the delete, press Yes to delete it or press No to cancel the delete. You will be returned to the address book screen.

Printing the Address Book:

From the Address book screen press the Print button, this will display a Crystal Reports © print preview window as shown below;

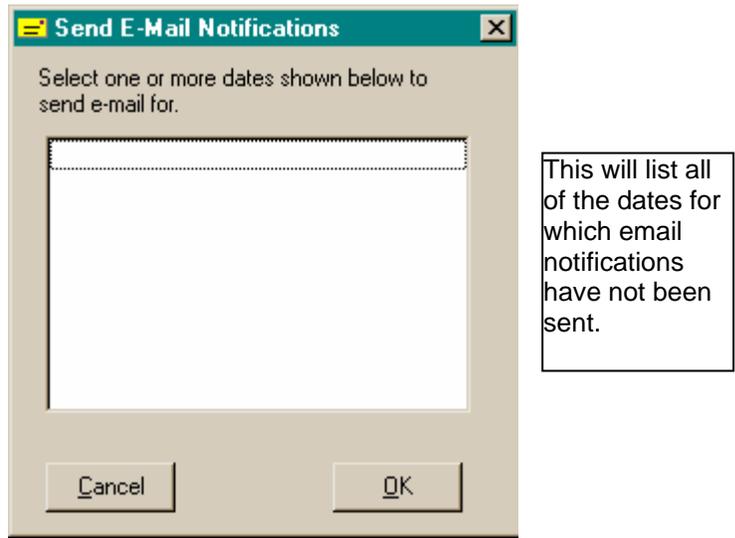


To print the report press the  icon.
To maximize the preview window click on the Maximize  button.

Sending Email Notifications:

If ERS has been configured to send email notifications to the escrow officers when the files are sent to the County Recorders Office then you don't need to use this function, it is done for you automatically.

If you wish to use this function then press  on the toolbar, this will display the following screen;



Select the dates by clicking on the date and press OK when you are done. Press Cancel to return to the desktop.