



Electronic Recording System

Version 4.0.1

User Manual

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Introduction To The Electronic Recording System

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. ERS enables the scanning in of one or more documents that will be sent as a package and recorded at the County Recorder's Office. If appropriate, once a document is scanned, pages can be deleted and rotated. ERS creates useful tracking and other information associated with every document package. These document packages can be easily organized and moved into various queues and are stored there until ready to be sent electronically to the County Recorder's Office. Then, electronically, the County Recorder's Office either sends back the recorded package, or a memo if the package was unable to be recorded. Recorded documents can then be printed.

This manual will explain all of the functionality contained within the ERS application, and discuss how each tool might be used. As each company functions in its own unique way, there are some functions that may not be utilized, but you are encouraged to examine and consider all of them, to ensure you are getting the most out of ERS.

There are a number of configuration options that can affect the functionality of the system. These variations are discussed in the Electronic Recording System Administrator Manual.

General Information And Helpful Hints

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 options 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 when the option does not have a letter underlined.



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.

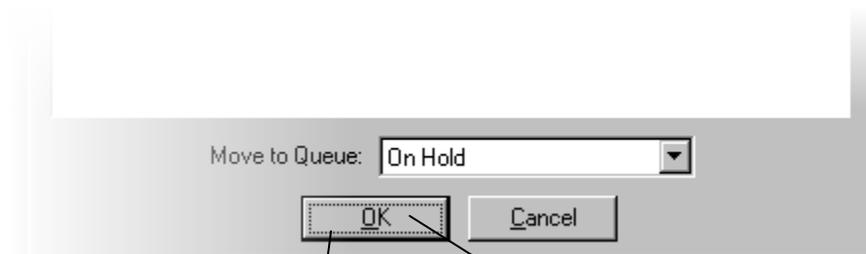
Tab:

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).



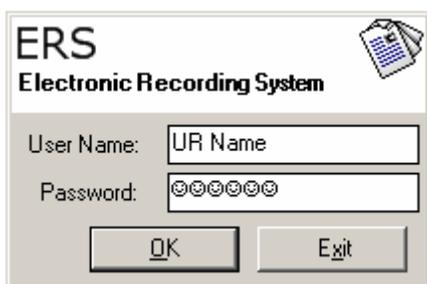
Button with dots on the face

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, the administrator of 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 your access level, not all of the menu options or tool bar icons may be available to you.

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	CTRL+N
	Open Package	CTRL+O
	Options	CTRL+P
	Send to County Recorder	CTRL+E
	Address Book	CTRL+A
	Queues	CTRL+Q
	Reprint Documents	CTRL+R

File Menu

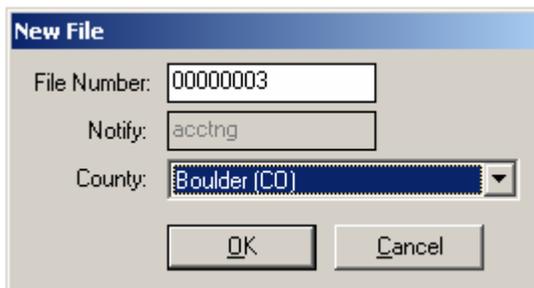
New

There are four (4) ways to create a new ERS file:

- Use the **ALT+F** to activate the drop down menu, then **N** to open the **New File** selection window
- Click on the **File** menu with the mouse, then click on **New**
- Use the shortcut icon on the tool bar (**New File**)
- Use the **CTRL+N** Quick Keys

In the **File Number** field of the **New File** dialogue box, type in an escrow file number, and then press the **TAB** key.

For this **File Number**, ERS will create a unique **Package ID** in the ERS database. Because some counties allow the submittal of more than one (1) “package” for an escrow file, ERS creates this unique **Package ID**, in order to differentiate between these packages, if, at another time, a different package for the same escrow file is submitted to the County Recorder’s Office.



The image shows a 'New File' dialog box with the following fields and values:

- File Number: 00000003
- Notify: acctng
- County: Boulder (CO)

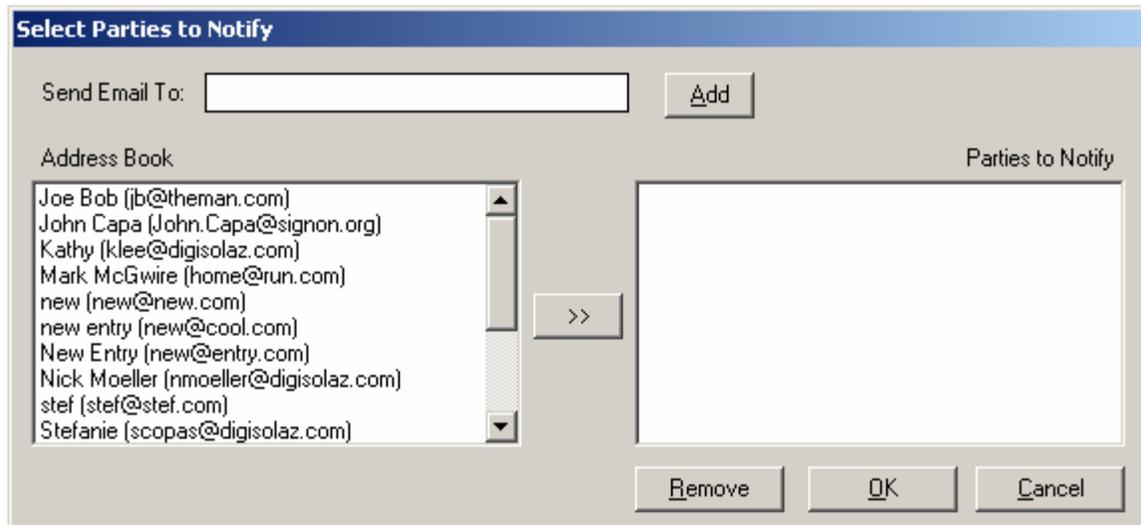
Buttons: OK, Cancel

ERS will verify if an e-mail address exists in the Impact/SQL address book for the escrow officer associated with the escrow file, if your system is configured for integration with Impact/SQL. If the escrow file exists, then the escrow officer name associated with the escrow file will be displayed in the **Notify** field, otherwise the **Notify** field will be blank.

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

Click on the **OK** button to continue to the **Select Parties to Notify** screen, or **Cancel** to exit back to the ERS desktop.

The **Select Parties to Notify** screen will be displayed.



The **Select Parties to Notify** screen enables you to select names that should be notified of the status of the scanned package. If the **New File** dialogue box had the escrow officer name displayed in the **Notify** field, then you can add additional names to notify, if applicable, from this screen. If there was not an escrow officer name displayed in the **Notify** field, then add all names to notify from this screen.

If an appropriate name is listed in the **Address Book** list on the left, highlight the name and then click on the **>>** button in the middle of the screen, to include the name on the **Parties to Notify** list on the right. If applicable, repeat this procedure for any additional name(s) to include.

To remove a name from the **Parties to Notify** list on the right, highlight a name, then click on the **Remove** button.

To cancel without selecting a name in the **Select Parties to Notify** screen, press the **Cancel** button to continue to the screen used for scanning a document. See the **Scan A Document** section below for details.

To use the name(s) listed in the **Parties to Notify** area, click on the **OK** button.

If an appropriate name is not listed in the **Address Book** list on the left, and you wish to add the person to the **Address Book**, enter the appropriate e-mail address in the **Send Email To** field at the top of the screen, and click on the **Add** button. A confirmation dialogue box will pop up. Press **ENTER** or click on **Yes** to add a new entry to the **Address Book**, alternatively, click on **No** to use the e-mail address for only this package and not add it to the **Address Book** list.



If **Yes** was selected, enter the person's name in the **Name** field, and then click on **Ok**.

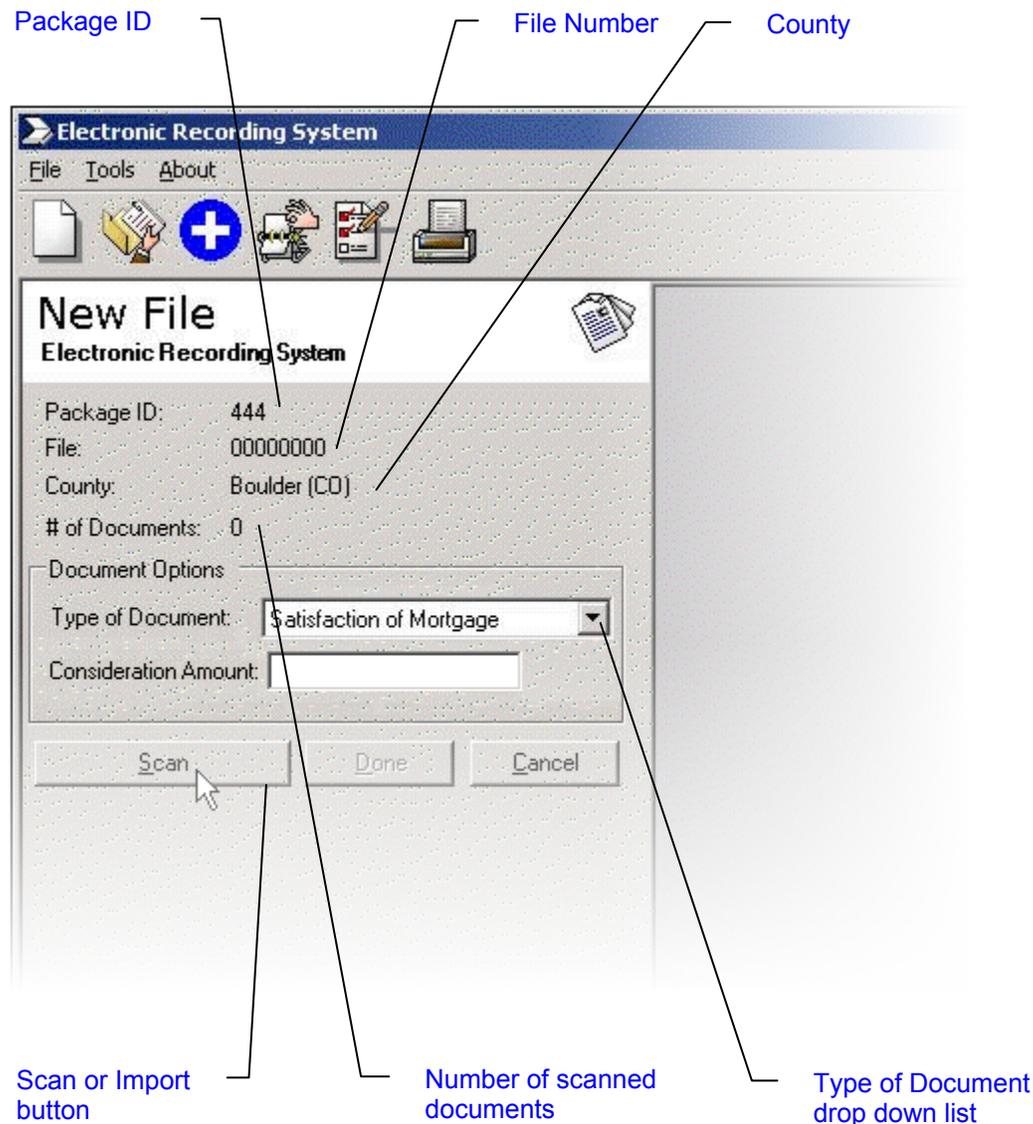


The person's **Name** and **Email Address** will be added to the **Address Book** and the **Parties to Notify** list on the right, but the **Address Book** list on the left side of the screen will not be refreshed with the new entry until later.

Scan A Document

Once the **File Number** and e-mail address (if applicable) information is entered, the **New File** screen is displayed.

On the **New File** screen, depending on system configuration, you will either see the **Scan** button, right below the **Document Options** area of the screen, or you will see the **Import** button. If the **Import** button is displayed, then see the **Import A Document** description in the section below for an explanation of this screen.

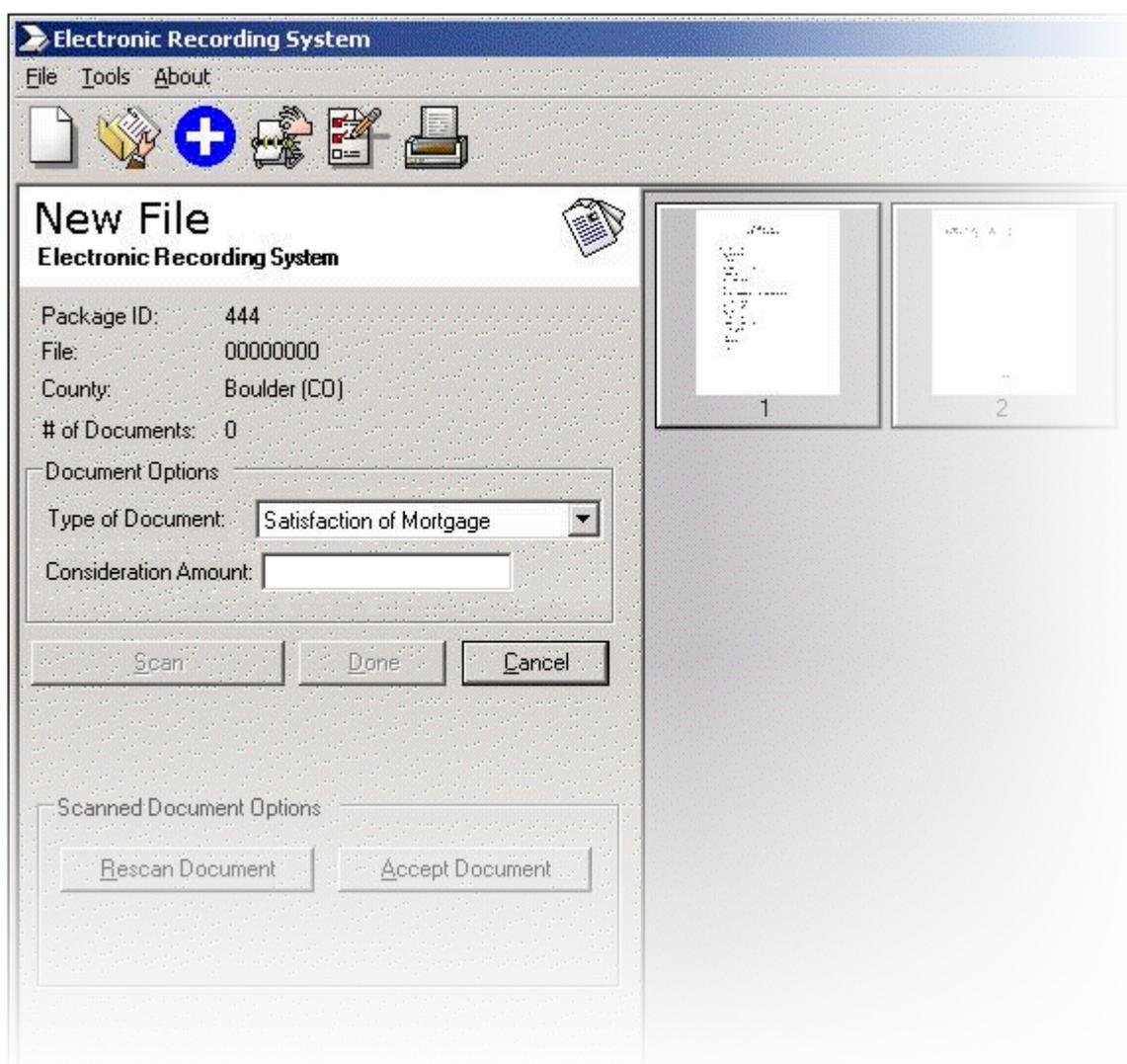


In the **Document Options** area of the screen, click on the **Type of Document** drop down list arrow, or use the down or up arrow keys to make your selection.

After selecting the **Type of Document**, confirm that the document pages are correctly inserted into document scanner.

Click on the **Scan** button to open the TWAIN interface to your scanner's setup page. Refer to the documentation that came with your scanner, for instructions on its use. Select the appropriate options for your scanner if needed, and click on the **Scan** (or similar) button to begin scanning the document pages.

When the scanner has completed scanning the page(s) of the document, the **New File** screen will be displayed again. If more than one (1) page was scanned, then the right side of the screen will show a thumbnail image of each of the pages that were scanned, otherwise the right side of the screen will show a full page view of the single page.



Scanned Document Options

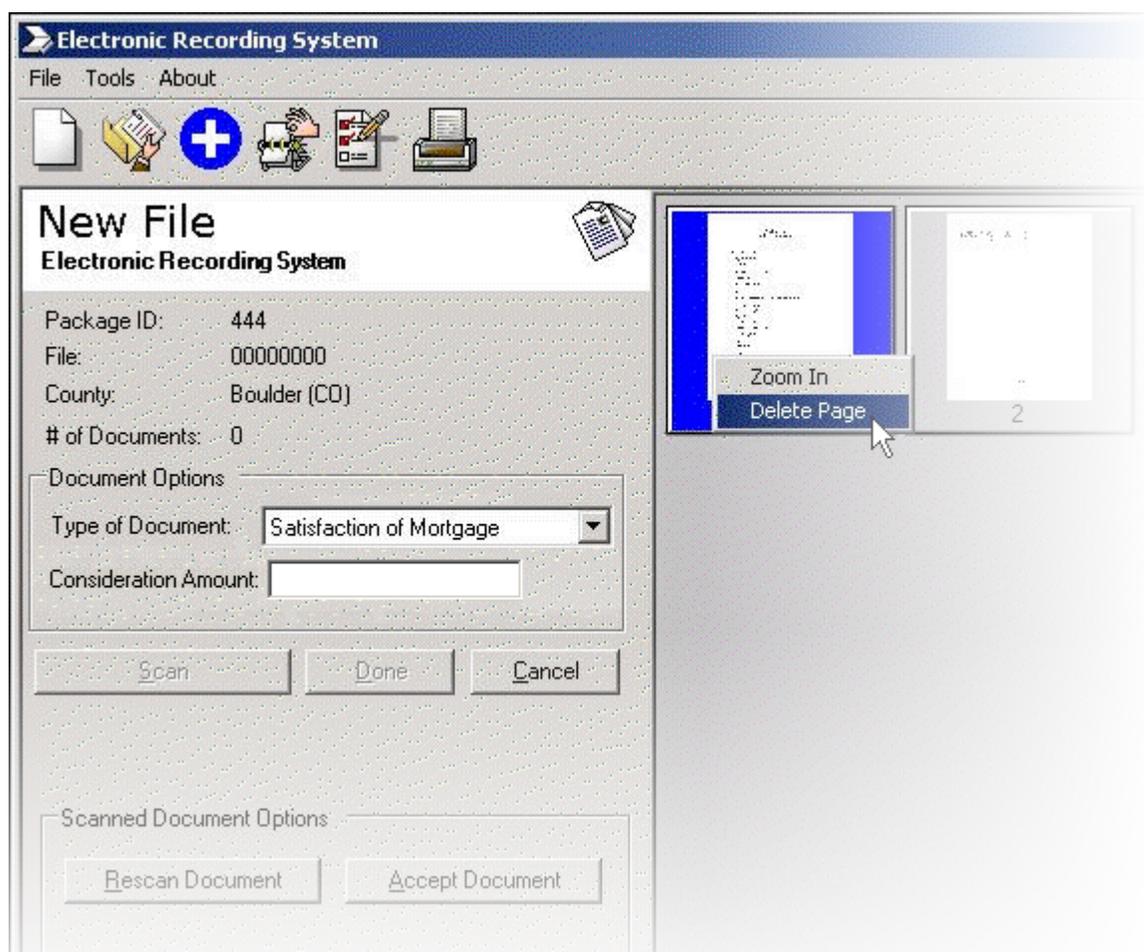
After scanning the document page(s), you can delete, rotate, or view the page(s).

The document can also be rescanned if applicable.

When the document is satisfactorily scanned it can be saved.

Delete a Scanned Page

Click on the image of the page to be deleted, then right-click on the image to display a menu with several options, and then select **Delete Page**.



A confirmation dialogue box will pop up. Press **ENTER** or click on **Yes** to proceed, or click on **No** to return to the screen with the thumbnail images.

To delete a scanned document consisting of only one (1) page, click on **Rescan Document** to replace the existing document by scanning a new document, or

click on **Cancel**. If **Cancel** is selected, a confirmation dialogue box will pop up, then press **ENTER** or click on **Yes** to return to the **New File** dialogue box.

Rotate a Scanned Page

Click on the thumbnail image of the page to be rotated, and then double-click on the image.

When the right area of the screen displays only a single document page, the **Scanned Document Options** area of the screen will display four (4) options. Click on the **Rotate Image** button. Each time that **Rotate Image** is selected, the image of the document page will rotate clockwise an additional 90 degrees.

The screenshot shows the 'New File' dialog box in the Electronic Recording System. The 'Document Options' section includes a dropdown menu for 'Type of Document' set to 'Satisfaction of Mortgage' and an empty text field for 'Consideration Amount'. Below this are 'Scan', 'Done', and 'Cancel' buttons. The 'Scanned Document Options' section includes 'Rescan Document' and 'Accept Document' buttons, a 'Zoom' dropdown menu set to '20%', and a 'Rotate Image' button. A mouse cursor is hovering over the 'Rotate Image' button. Two blue arrows point from labels at the bottom to the 'Zoom' dropdown and the 'Rotate Image' button. The background shows a document page with 'Windsong County' and '10/27/2007 10:51:00 AM' visible.

Zoom drop down list

Rotate Image button

View a Single Scanned Page

Double-click on a thumbnail image of a page to change the display size from a thumbnail view to a full page view. To change the zoom factor (to increase or decrease the size of the image displayed), click on the **Zoom** pull down list arrow in the **Scanned Document Options** area of the screen. If needed, the image can be rotated by following the instructions above. When you are finished viewing the image of the document page, click on the image to return to the thumbnail view.

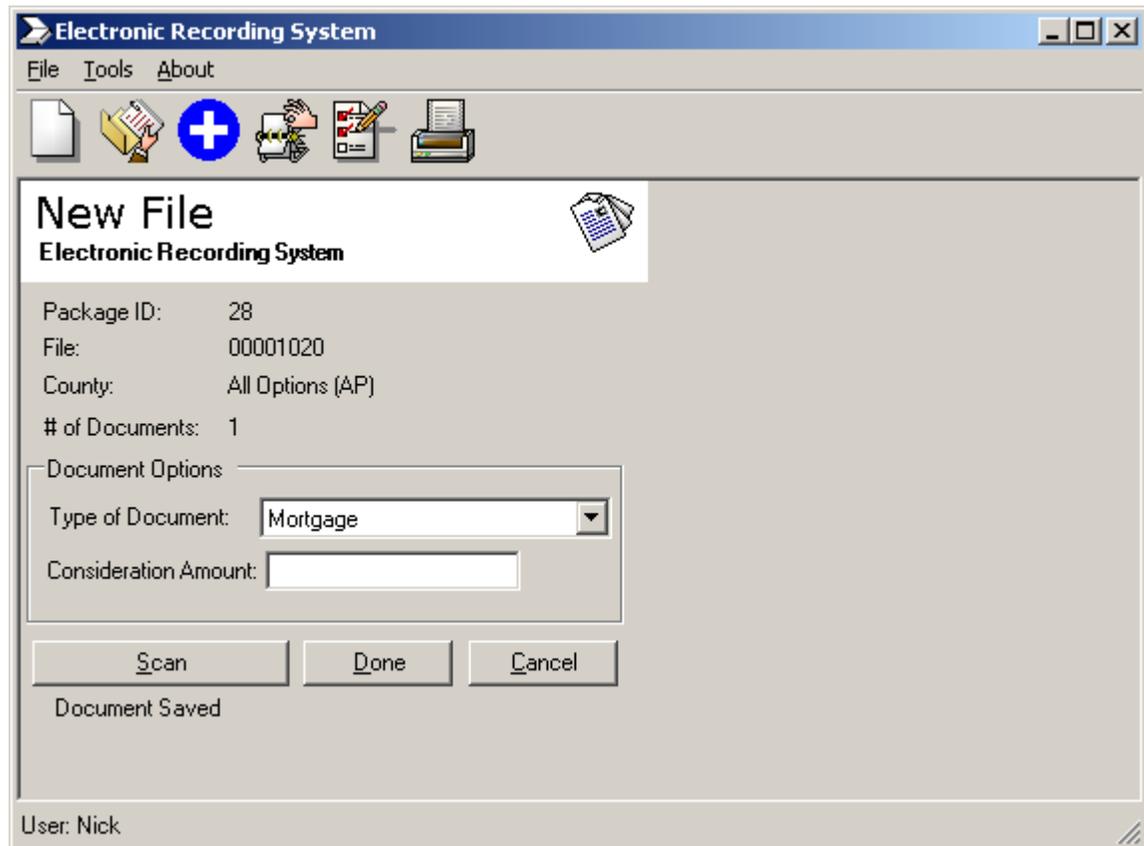
Rescan The Document Page(s)

If the document was scanned unsatisfactorily, and should be rescanned, click on the **Rescan Document** button to rescan the entire document.

Save a Successful Document Scan

When the document is scanned to your satisfaction, click on the **Accept Document** button to save the scanned document page(s), clear the document preview area, and also clear and update the **Scanned Document Options** area of the screen to reflect that the **Document Saved**, and that ERS is ready to scan another document.

Depending on the company's configuration, the **Type of Document** that is selected may require that an amount be entered into the **Consideration Amount** field. 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. Normally, this field 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.

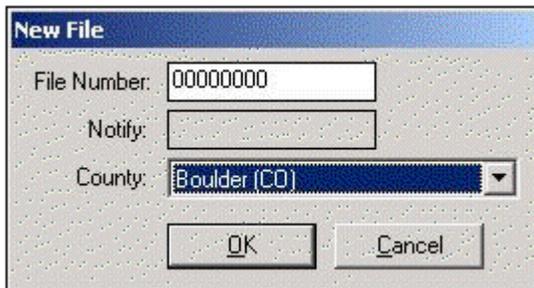


The screenshot shows the 'New File' dialog box in the Electronic Recording System. The window title is 'Electronic Recording System' and it has a menu bar with 'File', 'Tools', and 'About'. Below the menu bar is a toolbar with icons for file operations. The main area of the dialog is titled 'New File' and 'Electronic Recording System'. It contains the following fields and controls:

- Package ID: 28
- File: 00001020
- County: All Options (AP)
- # of Documents: 1
- Document Options section:
 - Type of Document: Mortgage (selected in a dropdown menu)
 - Consideration Amount: (empty text field)
- Buttons: Scan, Done, Cancel
- Status: Document Saved
- User: Nick

If applicable, click on **Scan** to scan more documents for this package.

If you are finished scanning documents for this package, click on the **Done** button. ERS will save all the documents for this package in the database and return to the **New File** dialogue box.



The image shows a 'New File' dialog box with the following fields and controls:

- File Number:** 00000000
- Notify:** (empty text box)
- County:** Boulder (CO) (dropdown menu)
- Buttons:** OK, Cancel

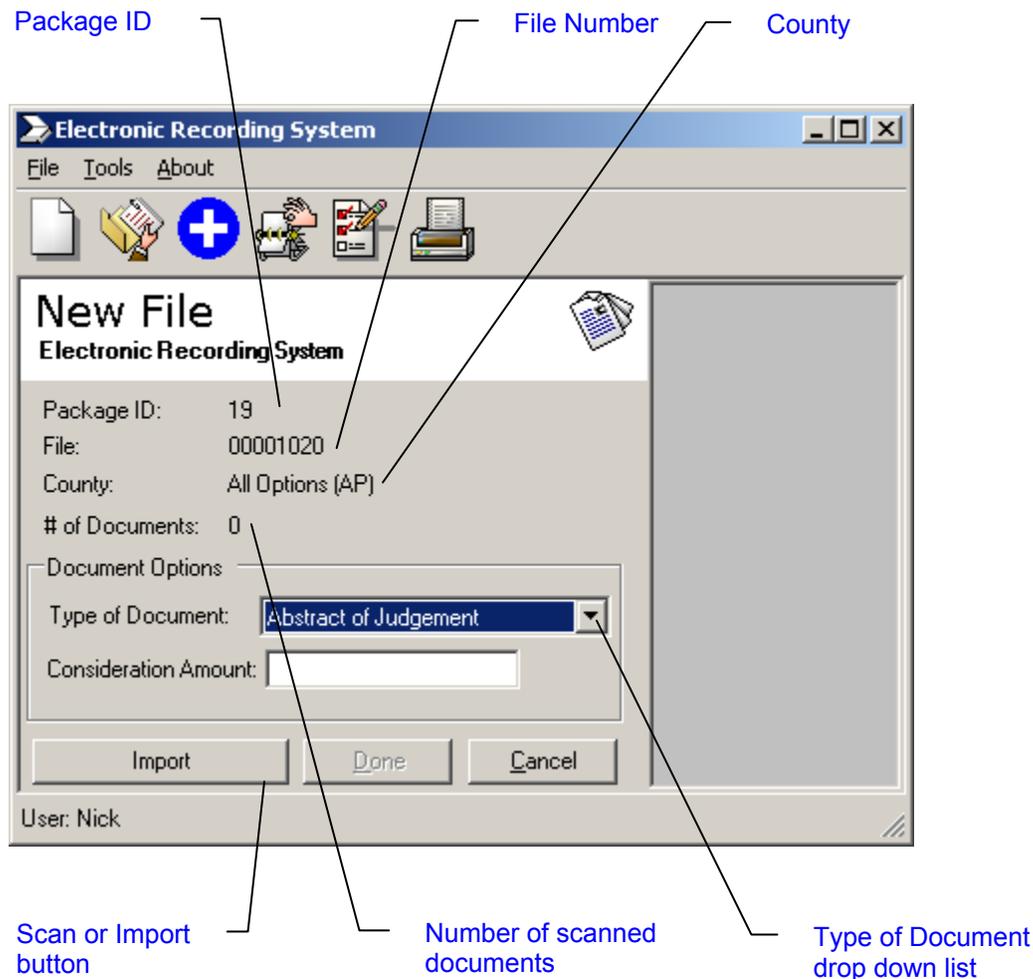
If you click on the **Done** button, and later more documents must be included in the package before it is sent to the county, an entirely new package must be created (**File > New**). Once a new package is **Done**, note its **Package ID**, then go back and delete the incomplete package (it has a different **Package ID**), since it was replaced with the new package.

NOTE: All scanned documents are placed in the **Scanned** queue.

Import A Document

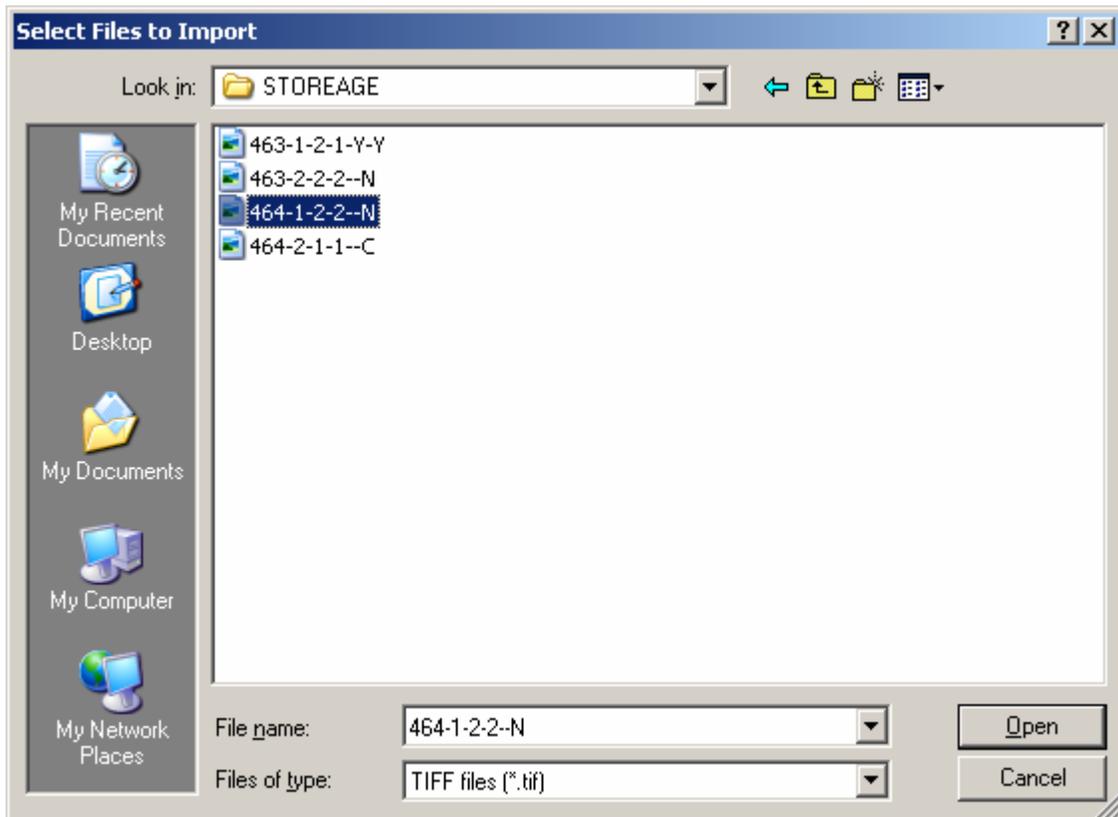
Once the **File Number** and e-mail address (if applicable) information is entered, the **New File** screen is displayed.

On the **New File** screen, depending on system configuration, you will either see the **Scan** button, right below the **Document Options** area of the screen, or you will see the **Import** button. If the **Scan** button is displayed, then see the **Scan A Document** description in the section above for an explanation of this screen.



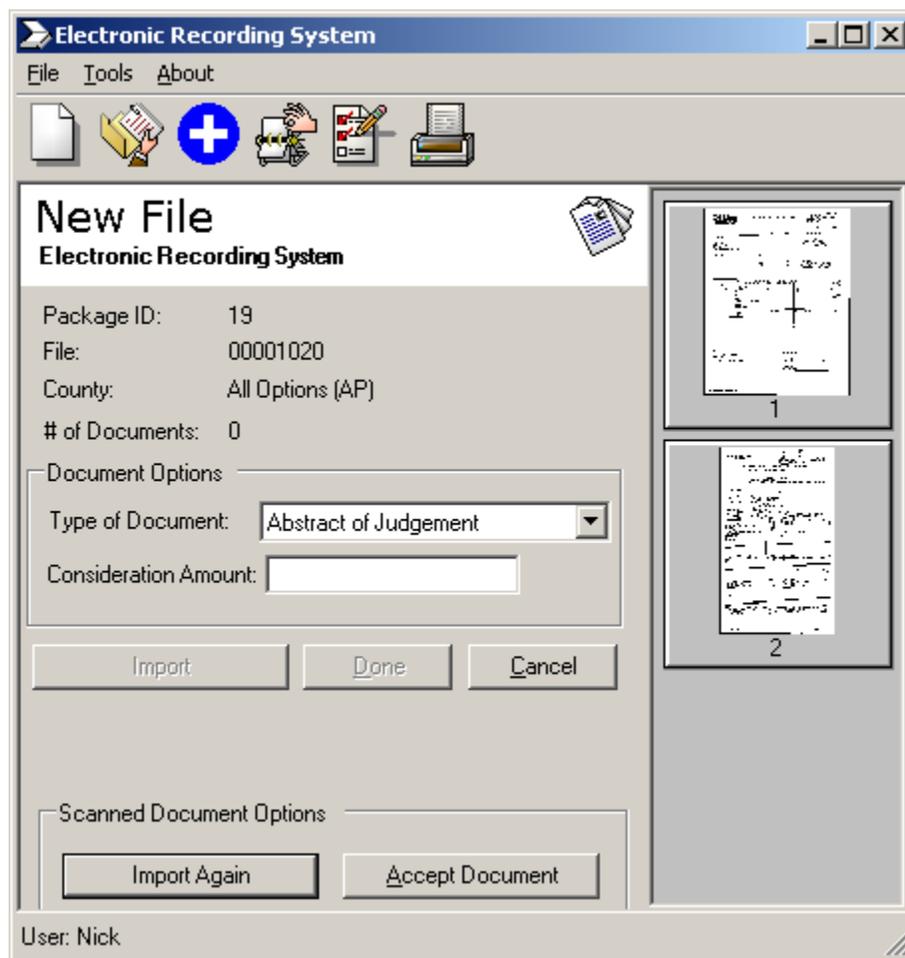
In the **Document Options** area of the screen, click on the **Type of Document** drop down list arrow, or use the down or up arrow keys to make your selection.

Click on the **Import** button to open the **Select Files to Import** screen from which you can browse the network or workstation drives and folders, and then select the appropriate Tagged Image File (TIF) format file to import into ERS. Check with your company on the policy for the TIF file naming conventions and file location(s).



Highlight the appropriate TIF file, then click on **Open**, or simply double-click on the file.

When ERS has completed importing the page(s) of the document, the **New File** screen will be displayed again. If the TIF file contains more than one (1) page, then the right side of the screen will show a thumbnail image of each of the pages, otherwise the right side of the screen will show a full page view of the single page.



Imported Document Options

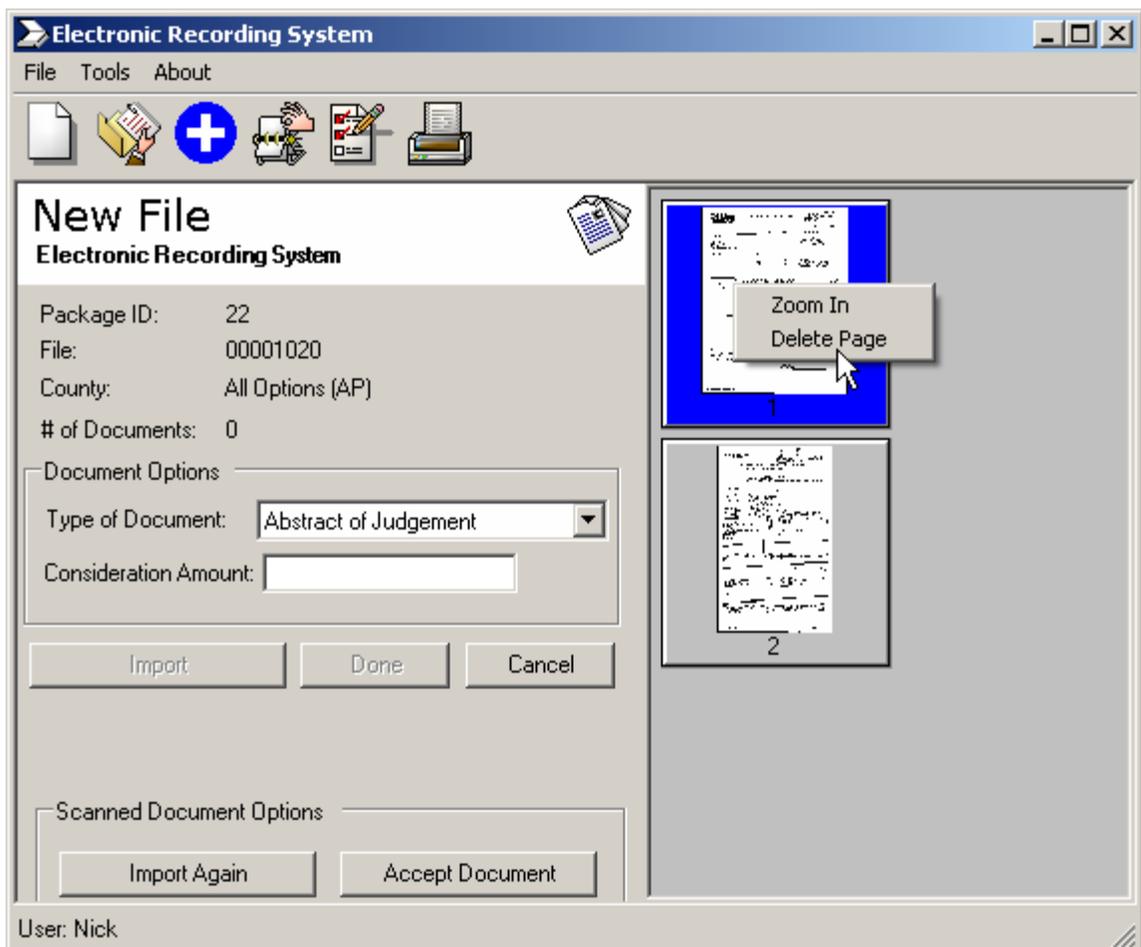
After importing the document page(s) from the Tagged Image File (TIF) format file, you can delete, rotate, or view the page(s).

If an incorrect document was imported, simply click on **Import Again** and select a different TIF file.

After determining that the document is satisfactorily imported, it can then be saved.

Delete An Imported Page

Click on the image of the page to be deleted, then right-click on the image to display a menu with several options, and then select **Delete Page**.



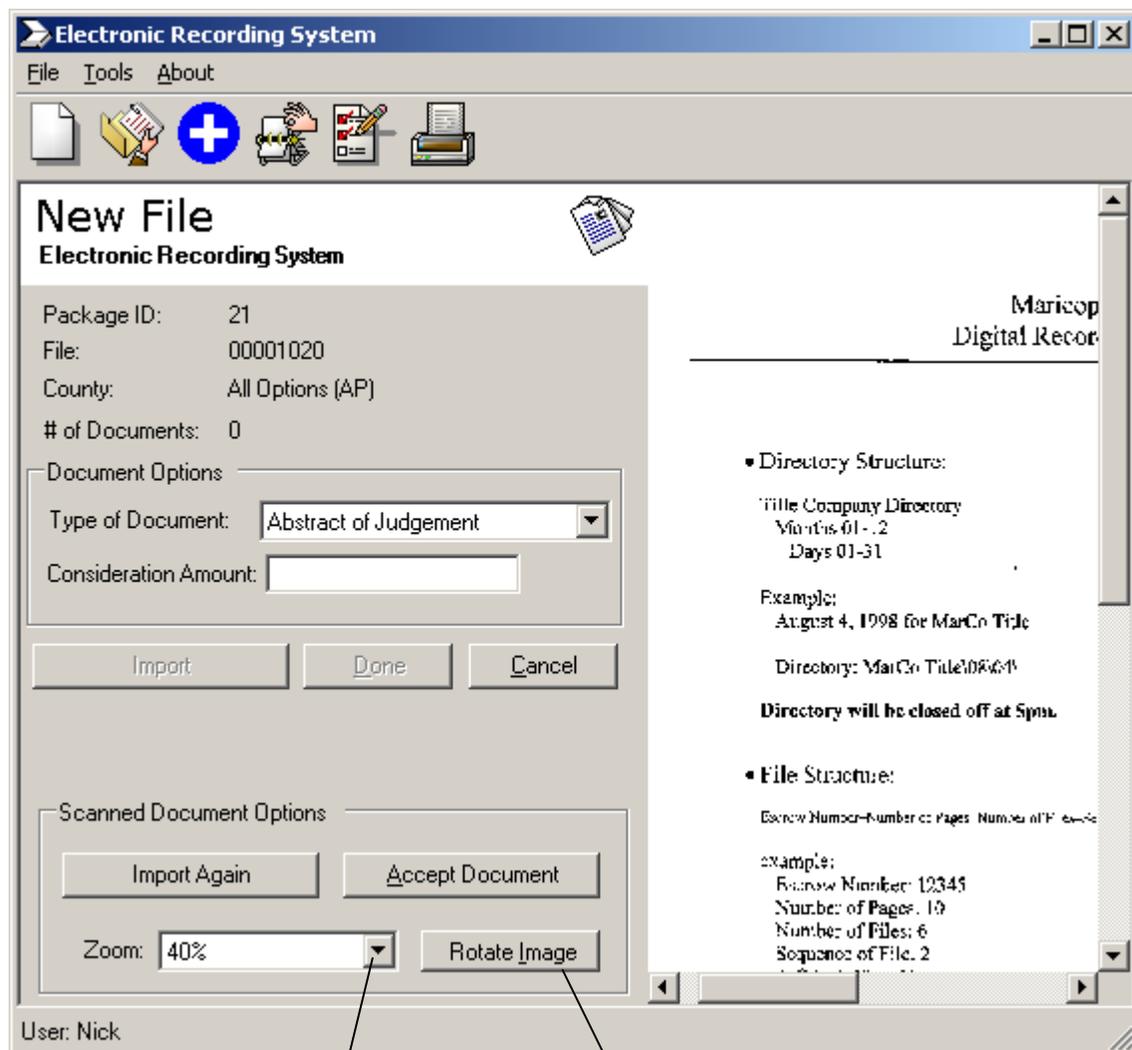
A confirmation dialogue box will pop up. Press **ENTER** or click on **Yes** to proceed, or click on **No** to return to the screen with the thumbnail images.

To delete a imported document consisting of only one (1) page, click on **Import Again** to replace the existing document by importing a new document, or click on **Cancel**. If **Cancel** is selected, a confirmation dialogue box will pop up, then press **ENTER** or click on **Yes** to return to the **New File** dialogue box.

Rotate An Imported Page

Click on the thumbnail image of the page to be rotated, and then double-click on the image.

When the right area of the screen displays only a single document page, the **Scanned Document Options** area of the screen will display four (4) options. Click on the **Rotate Image** button. Each time that **Rotate Image** is selected, the image of the document page will rotate clockwise an additional 90 degrees.



Zoom drop down list

Rotate Image button

View a Single Imported Page

Double-click on a thumbnail image of a page to change the display size from a thumbnail view to a full page view. To change the zoom factor (to increase or decrease the size of the image displayed), click on the **Zoom** pull down list arrow in the **Scanned Document Options** area of the screen. If needed, the image can be rotated by following the instructions above. When you are finished viewing the image of the document page, click on the image to return to the thumbnail view.

Import The Proper Document Page(s)

If an incorrect document was imported, simply click on **Import Again** and select a different TIF file.

Save a Successful Document Import

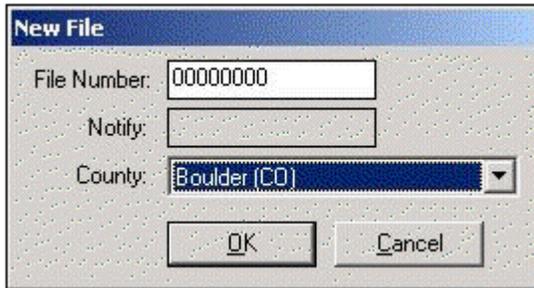
When the document is imported to your satisfaction, click on the **Accept Document** button to save the imported document page(s), clear the document preview area, and also clear and update the **Scanned Document Options** area of the screen to reflect that the **Document Saved**, and that ERS is ready to import another document.

Depending on the company's configuration, the **Type of Document** that is selected may require that an amount be entered into the **Consideration Amount** field. 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. Normally, this field 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 applicable, click on **Import** to import more documents for this package.

If you are finished importing documents for this package, click on the **Done** button. ERS will save all the documents for this package in the database and return to the **New File** dialogue box.



The image shows a 'New File' dialog box with the following fields and options:

- File Number: 00000000
- Notify: (empty)
- County: Boulder (CO)
- Buttons: OK, Cancel

If you click on the **Done** button, and later more documents must be included in the package before it is sent to the county, an entirely new package must be created (**File > New**). Once a new package is **Done**, note its **Package ID**, then go back and delete the incomplete package (it has a different **Package ID**), since it was replaced with the new package.

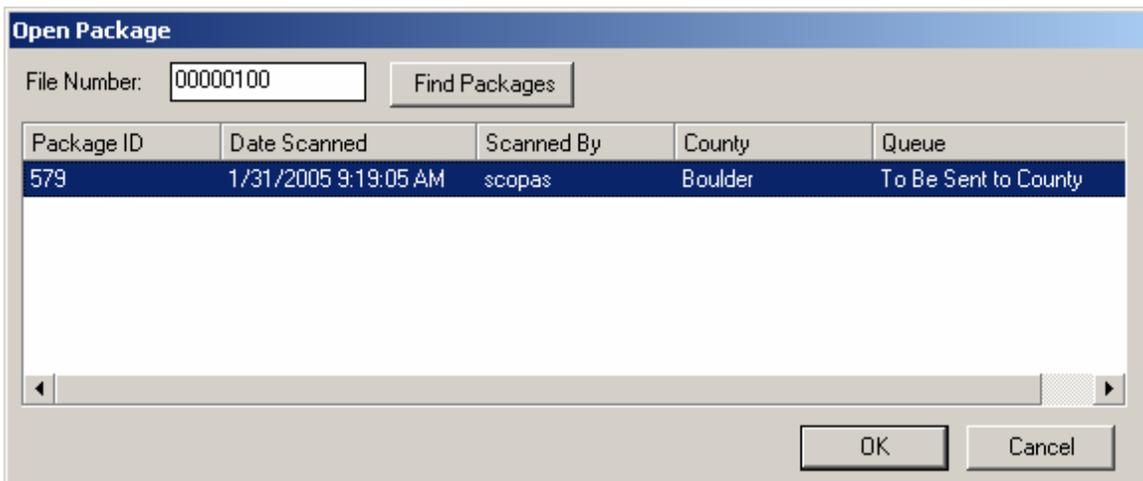
NOTE: All imported documents are placed in the **Scanned** queue.

Open

To access a package that has been scanned but not yet sent to the County Recorder's Office, select either **File > Open**, click on the **Open Package** icon on the toolbar, or use the **CTRL+O** Quick Keys.

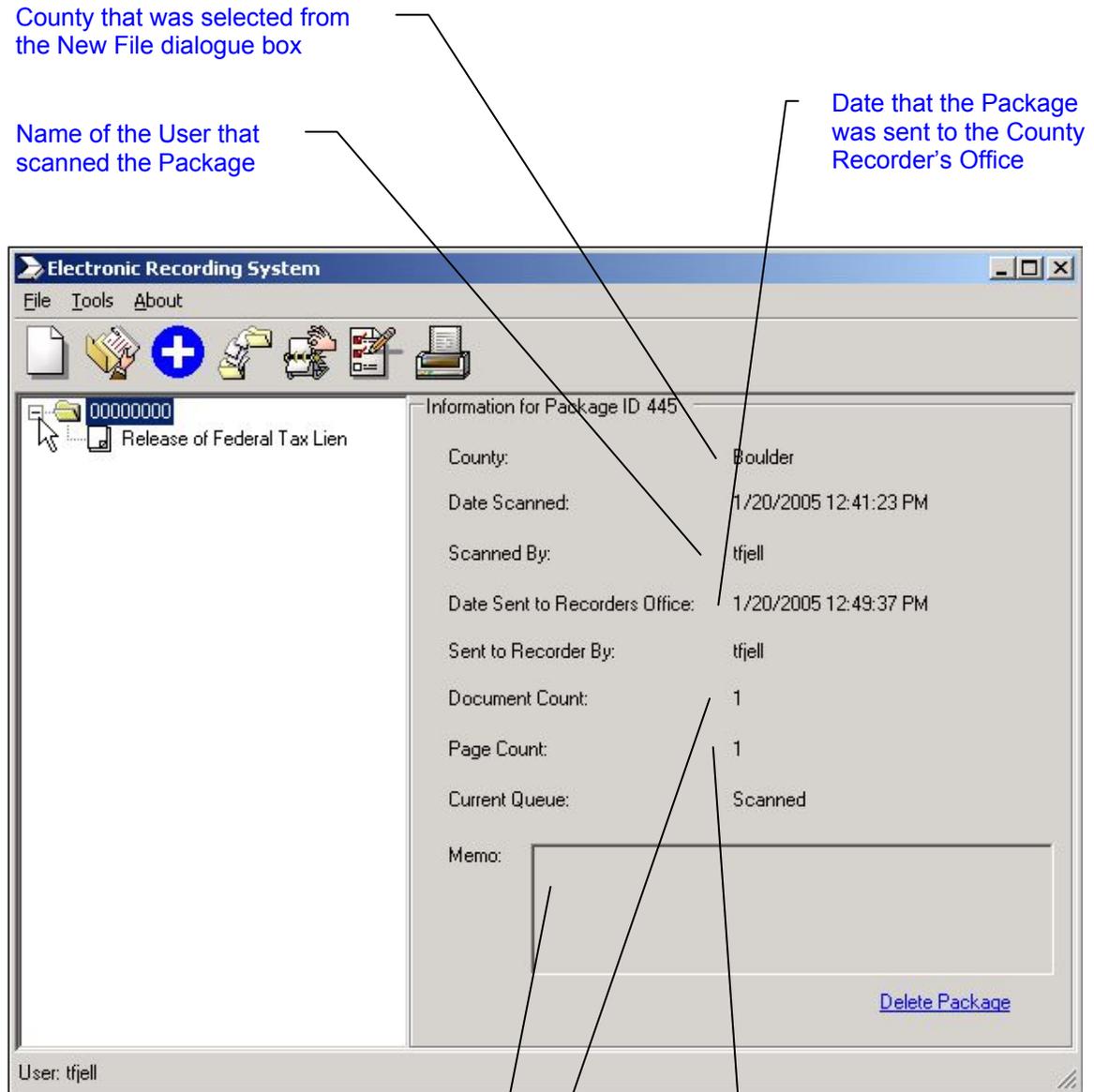


Enter a number in the **File Number** field and press **TAB** then **ENTER**, or click on the **Find Packages** button. More than one (1) package may exist for this **File Number**; highlight the correct **Package ID** and then click on **OK**, or just double-click on the **Package ID** number.



Click on the plus sign or double-click on the **File Number**, to expand the listing to show the names of the scanned documents directly below.

The right side of the screen will display various **Information for Package No** associated with the **File Number**.



County that was selected from the New File dialogue box

Name of the User that scanned the Package

Date that the Package was sent to the County Recorder's Office

If the Package is in the Rejected queue, then any memo from the County Recorder's Office will be here

Total Number of pages scanned for all of the documents

Number of documents scanned

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.

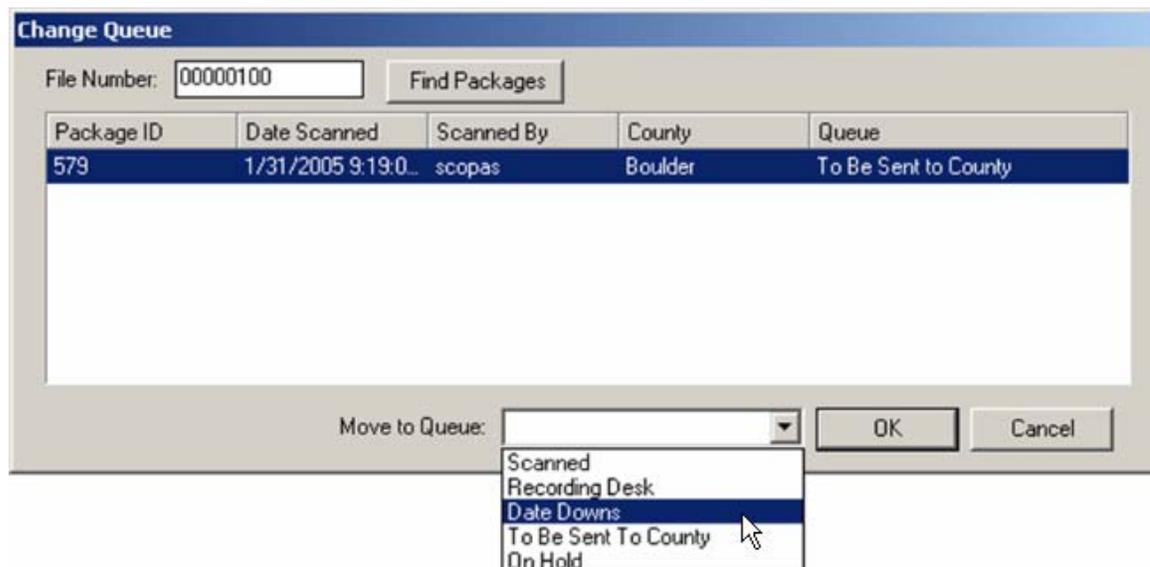
Change Queue

Select either **Change Queue** from the **Tools** menu or use the **CTRL+C** Quick Keys to view the **Change Queue** screen.

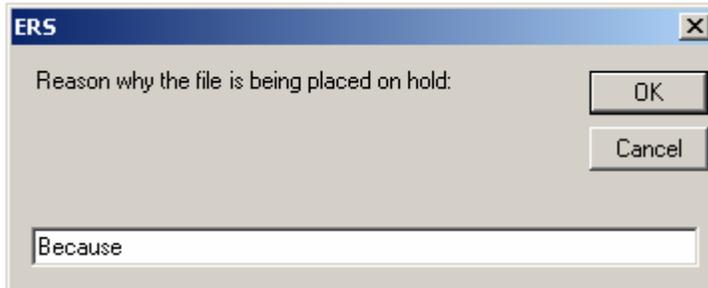
All scanned document packages are placed in the **Scanned** queue. To move a **Package** to another queue, use the **Change Queue** option as an alternative to the **Queues** option. The **Change Queue** option is especially useful if a file number has several packages that may not be located in the same queue, since the **Change Queue** screen lists the queue in which each package is located.

To move a package to another queue, enter a file number in the **File Number** field and then click on **Find Packages**.

Highlight the correct package from the resulting list displayed below the **File Number** field. Click on the **Move to Queue** drop down list arrow to select the correct destination queue, or press **TAB** to move to the **Move to Queue** drop down list, then press **F4** and use the down or up arrow keys. Click on the **OK** button to move the package to the destination queue, or **Cancel** to exit back to the ERS desktop. ERS will immediately update the list to reflect the new status of the moved package. If appropriate, repeat this step for any listed package.



If the destination of the package is the **Hold** queue, a reason for placing the package on hold must be entered in the text entry field of the pop up dialogue box. Press **ENTER** or click on **OK** to continue, alternatively, click on **Cancel** to exit back to the queues screen.



If **Cancel** is clicked or the text entry field is left blank, ERS will display an **Action cancelled** alert box.

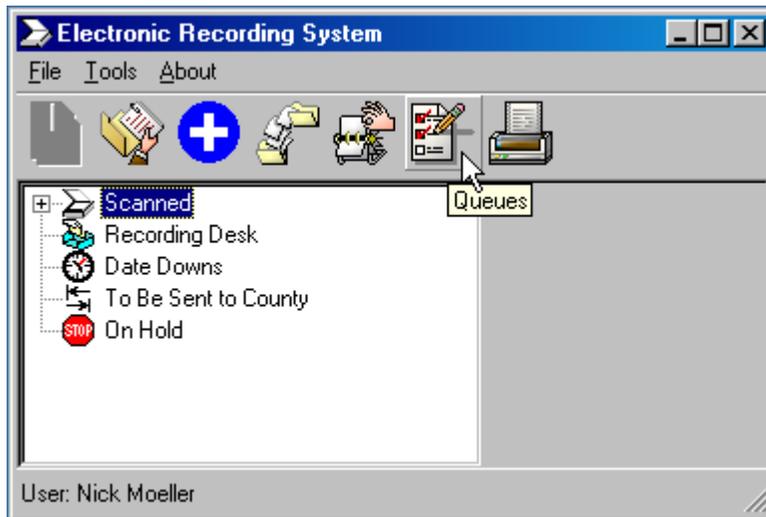
If a **File Number** is moved from any queue to the **To Be Sent to County** queue, these documents must then be reviewed and approved by a designated person before ERS will send them to the County Recorder's Office. See the **Send Files To County Recorder** section below for details.

NOTE: 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. Press **ENTER** or click on **Yes** to proceed.



Queues

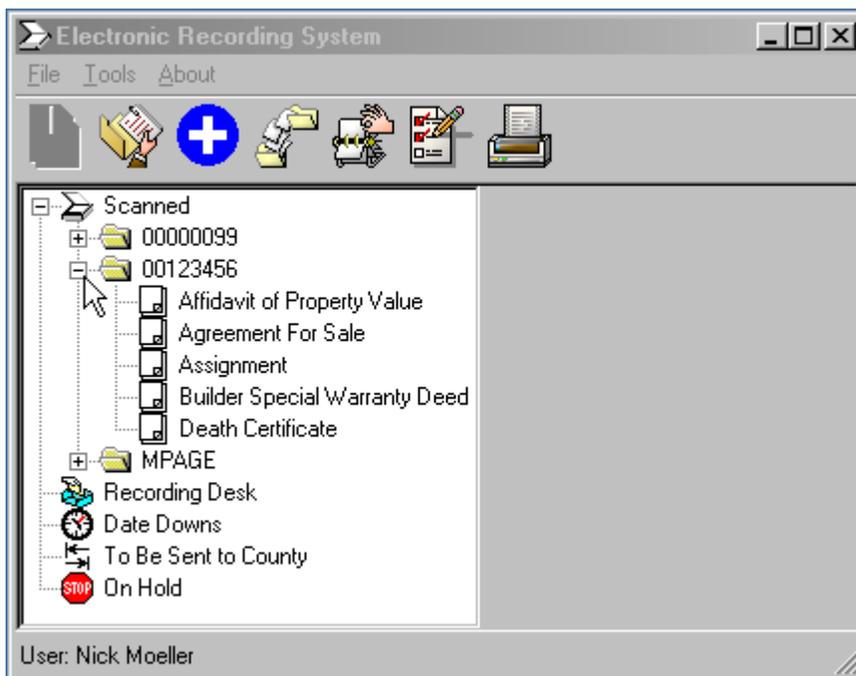
Select either **Queues** from the **Tools** menu, the **Queues** icon on the tool bar, or use the **CTRL+Q** Quick Keys to view the queues screen.



If a plus sign (+) is to the left of a queue name, click on the plus sign to expand the queue listing to show the **File Numbers** within that queue, for example, if the **Scanned** queue has a plus sign to the left of it, click on the plus sign to reveal any **File Numbers** listed in the **Scanned** queue.

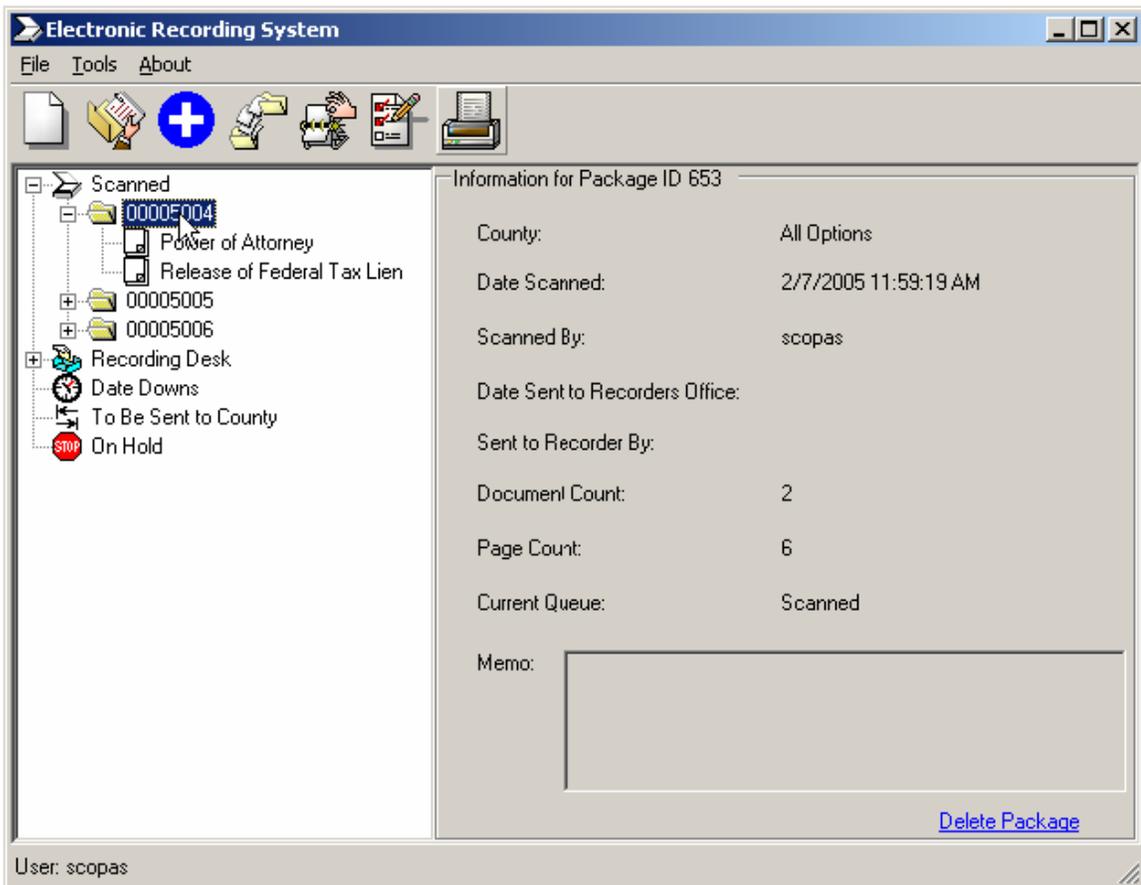


The queue listing shows the **File Numbers** within that queue. Click on the plus sign to the left of a **File Number**, to list the scanned document(s), for example, if **00123456** has a plus sign to the left of it, click on the plus sign to reveal any scanned document files listed for the **00123456 File Number**. If any **File Numbers** are listed more than once, then remember that each has its own unique **Package ID**.



View File Number Information

To view information related to a **File Number**, click on the number to display this information on the right side of the screen. ERS automatically assigns a **Package ID** number that groups the scanned documents into a package that will be sent to the County Recorder's Office as a unit (package).

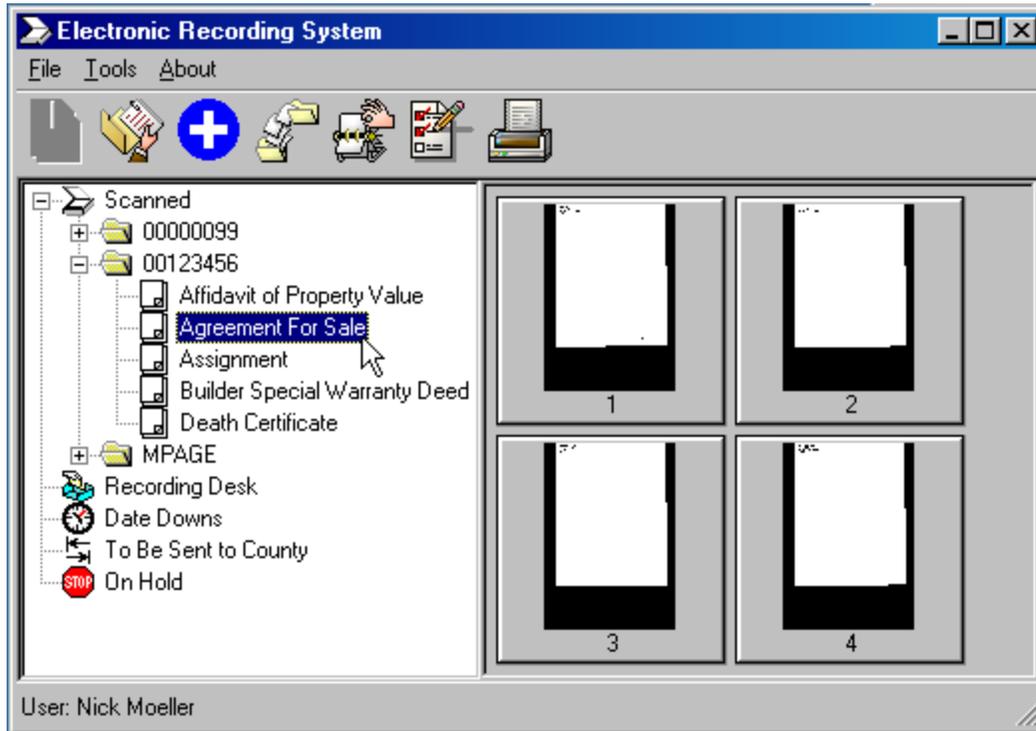


Delete A Package

Click on **Delete Package** on the lower right corner of the screen to delete the package. A confirmation dialogue box will pop up. Press **ENTER** or click on **Yes** to proceed.

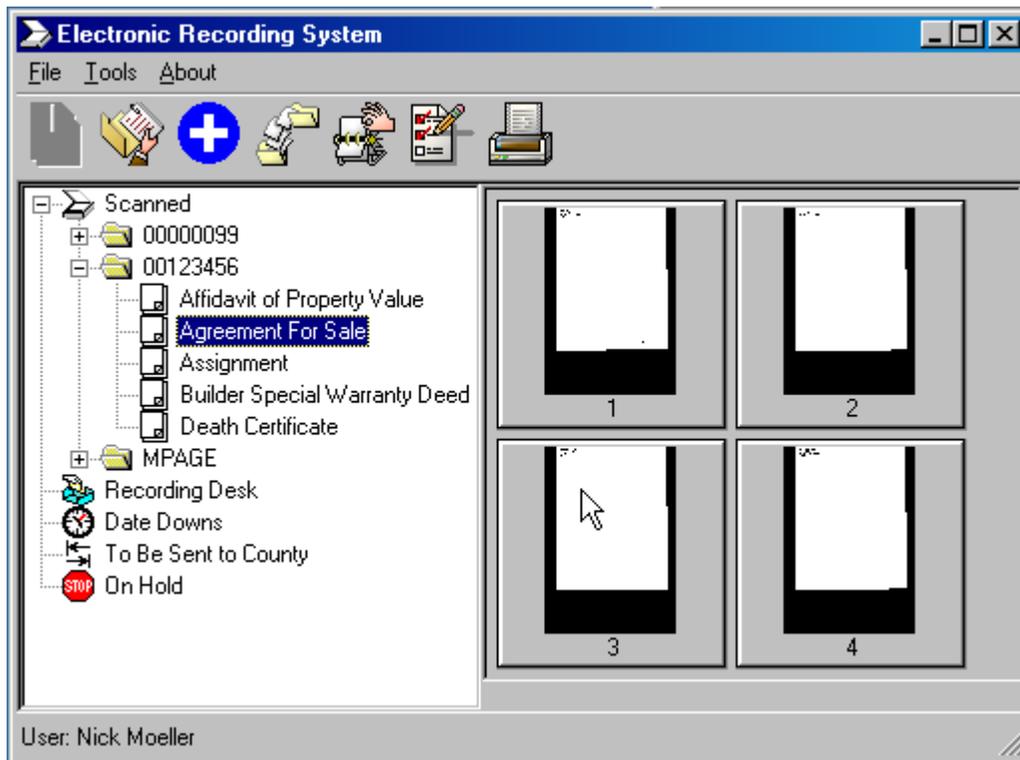
View Thumbnail Image(s) Of Document

To view a document file that was scanned, click on the title of the document, for example, click on **Agreement For Sale** to display the thumbnail images of each document page scanned to the **Agreement For Sale** document file.

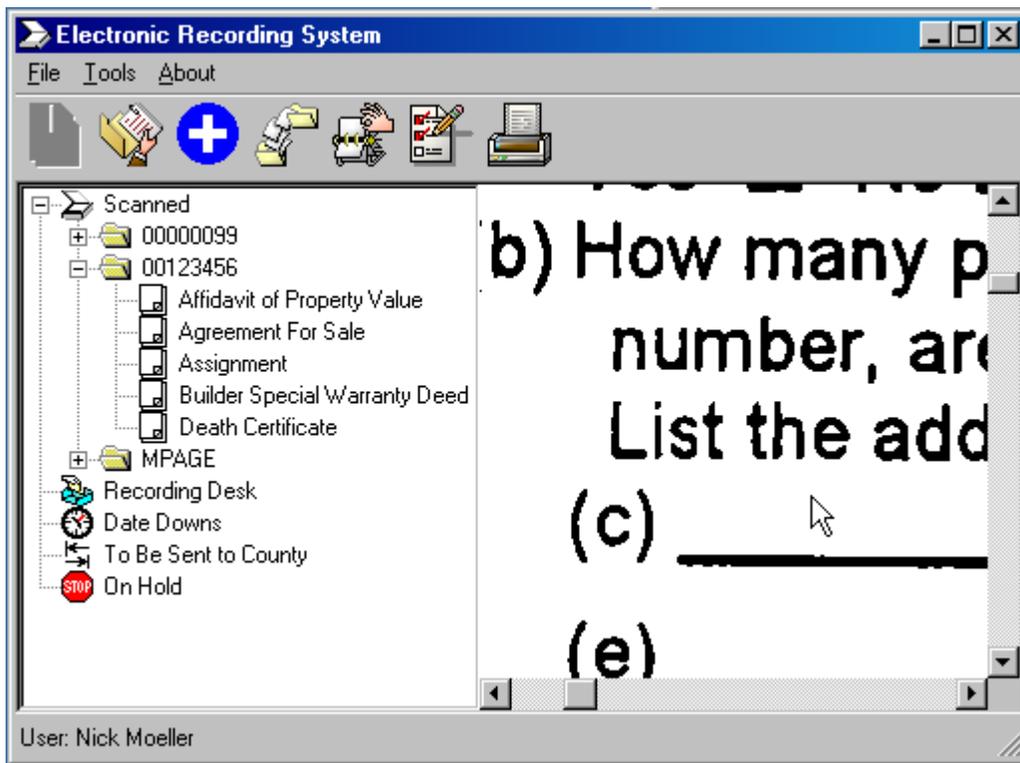


View Enlarged Thumbnail Image

To view an enlarged version of a thumbnail image, click on a thumbnail image of a document page.

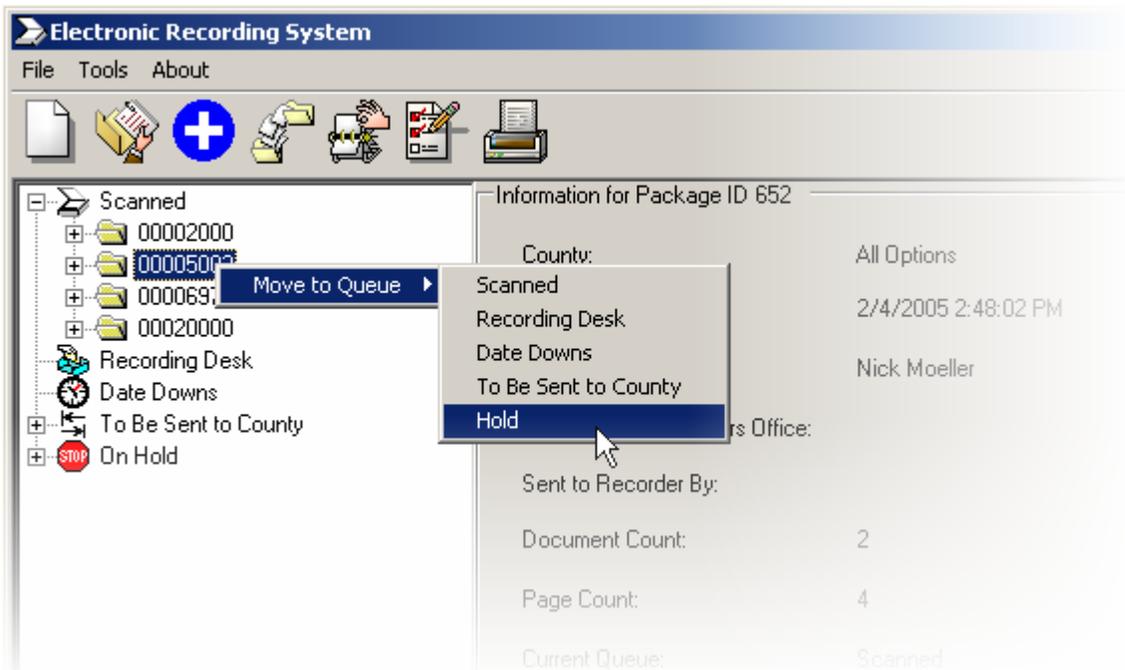


To return to the thumbnail view of a enlarged image, click on the enlarged image.

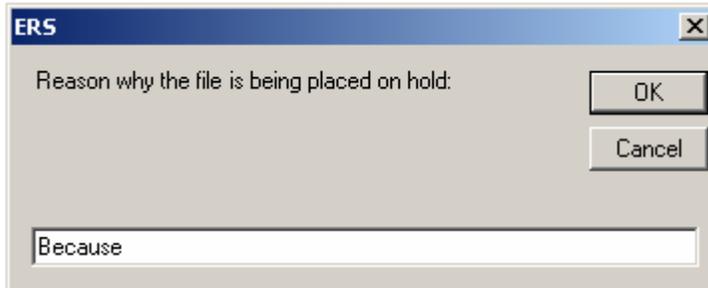


Move Document To Queue

All scanned document packages are placed in the **Scanned** queue. To move a **File Number** to another queue, right-click on the **File Number**, click on **Move to Queue**, and then click on the destination queue. For example, a **File Number** can be moved to the **Recording Desk** or **Date Downs** queue if the Recording Desk or Date Downs department is still working on the escrow file. Also, a **File Number** can be moved to the **Hold** queue if the escrow is placed on hold for any reason. The **File Number** will remain in that queue until moved by a designated person to the **To Be Sent to County** queue. Check with your company on the policy for queue assignment.



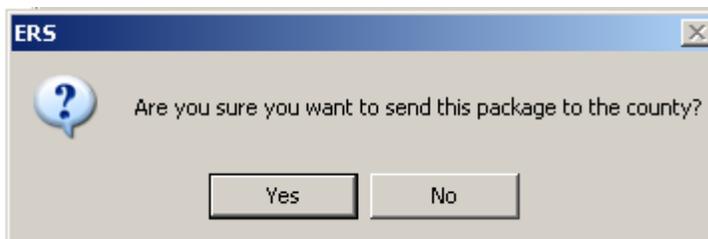
If the destination of the package is the **Hold** queue, a reason for placing the package on hold must be entered in the text entry field of the pop up dialogue box. Press **ENTER** or click on **OK** to continue, alternatively, click on **Cancel** to exit back to the queues screen.



If **Cancel** is clicked or the text entry field is left blank, ERS will display an **Action cancelled** alert box.

If a **File Number** is moved from any queue to the **To Be Sent to County** queue, these documents must then be reviewed and approved by a designated person before ERS will send them to the County Recorder's Office. See the **Send Files To County Recorder** section below for details.

NOTE: 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. Press **ENTER** or click on **Yes** to proceed.

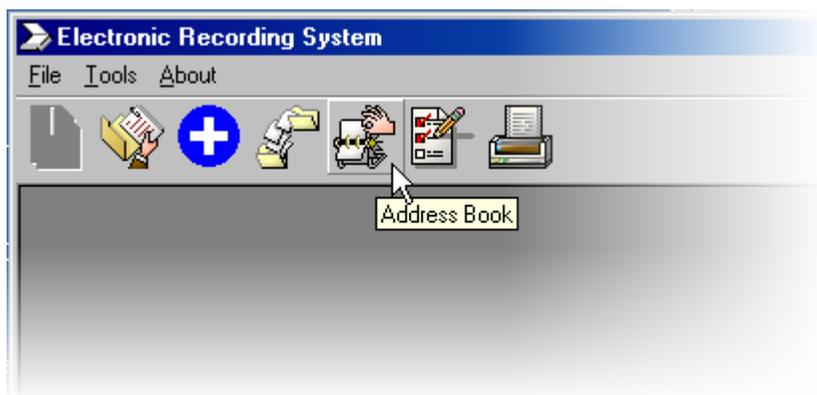


Refresh The Queues Screen

The queue screen can be refreshed manually by pressing the **F5** key.

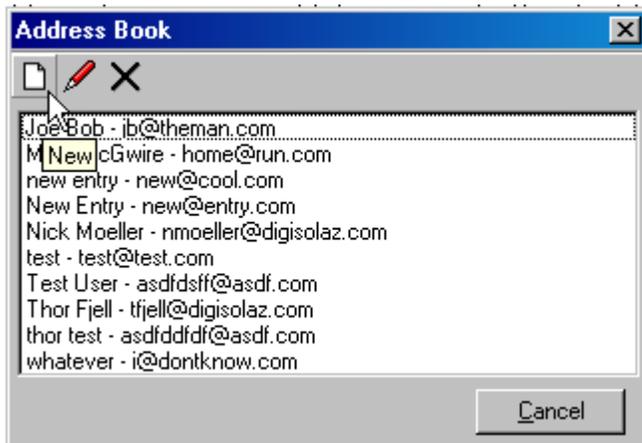
Address Book

To access the address book, click on the **Address Book** icon on the tool bar, or use the **CTRL+A** Quick Keys.

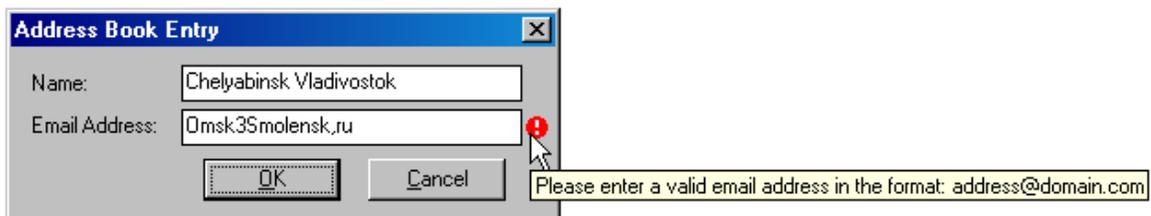


New

Click on the **New** icon on the **Address Book** tool bar, to add a new name and an e-mail address.

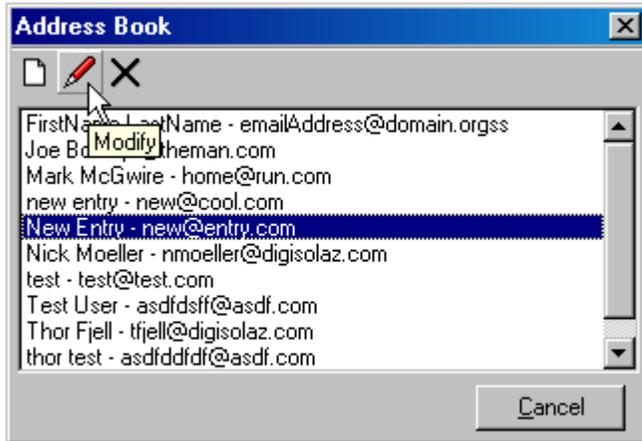


Enter a name in the **Name** field and a properly formatted e-mail address in the **Email Address** field, then either click on **OK** to add the name to the **Address Book**, or **Cancel** to cancel the entry. If an e-mail address is entered using an incorrect format, a red icon will be displayed to the right of the **Email Address** field.



Modify

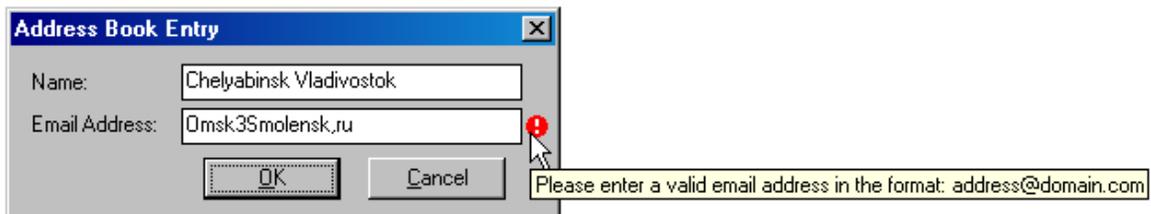
Highlight an name on the list, then click on the **Modify** icon on the **Address Book** tool bar, to change a name and/or email address.



Enter a name in the **Name** field and a properly formatted e-mail address in the **Email Address** field, then either click on **OK** to save these changes to the **Address Book**, or **Cancel** to cancel the entry.

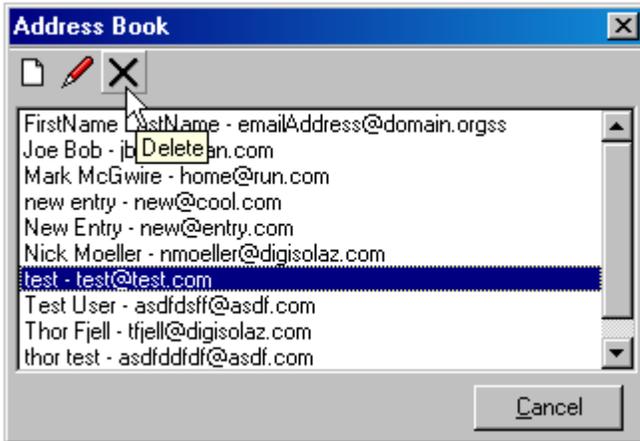


If an e-mail address is entered using an incorrect format, a red icon will be displayed to the right of the **Email Address** field.

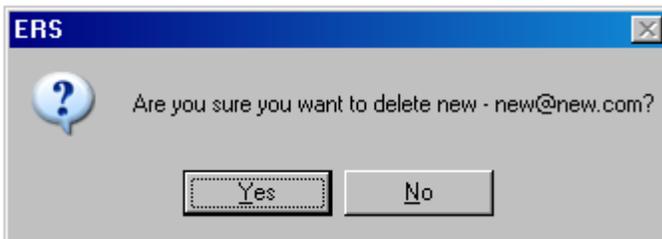


Delete

Highlight a name on the list, then click on the **Delete** icon on the **Address Book** tool bar, to delete a name from the **Address Book**.



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

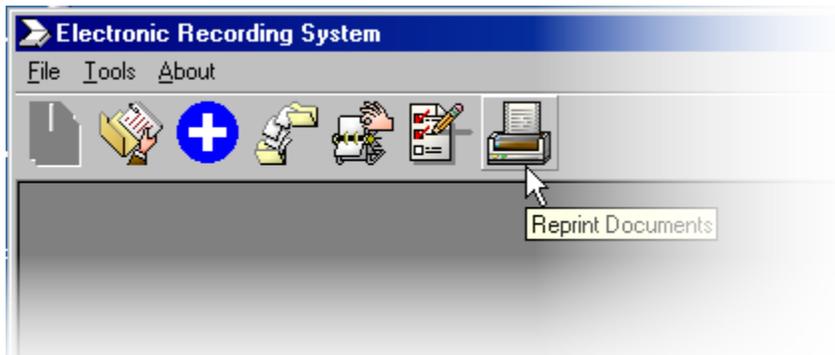


Cancel

Click on the **Cancel** button at the lower left corner of the **Address Book** to return to the ERS desktop.

Reprint Documents

To reprint a recorded document, click on the **Reprint Documents** icon on the tool bar, or use the **CTRL+R** Quick Keys.

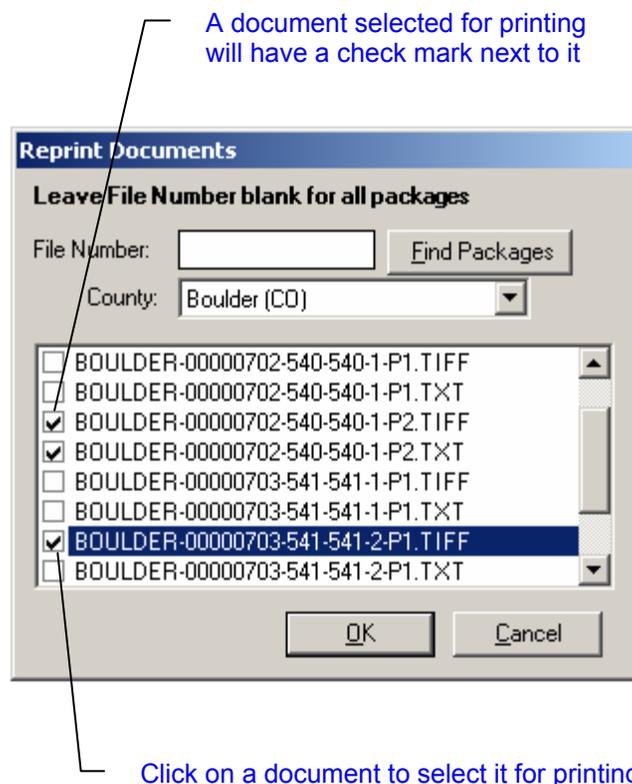


To display a list of packages for a specific **File Number**, enter the number in the **File Number** field, otherwise leave the field blank to retrieve a list of all packages.

Click on the **County** drop down list arrow to make your selection, or press **TAB** and then **F4**, then use the down or up arrow keys to make your selection.

Press **TAB** to have the documents listed below the **County** field.

Click on each document to be printed. A check mark will be displayed to the left of each item selected. To unselect a checked item, click on the checked item again.



The document name consists of the name of the county, a dash (-), the **File Number**, a dash (-), the **Package ID**, a dash (-), and various other numbers used by ERS.

Click on the **OK** button to print the selected documents.

Send To County Recorder

To send any ERS file which is listed in the **To Be Sent to County** queue, click on the **Send to County Recorder** icon on the tool bar, or use the **CTRL+E** Quick Keys.

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.



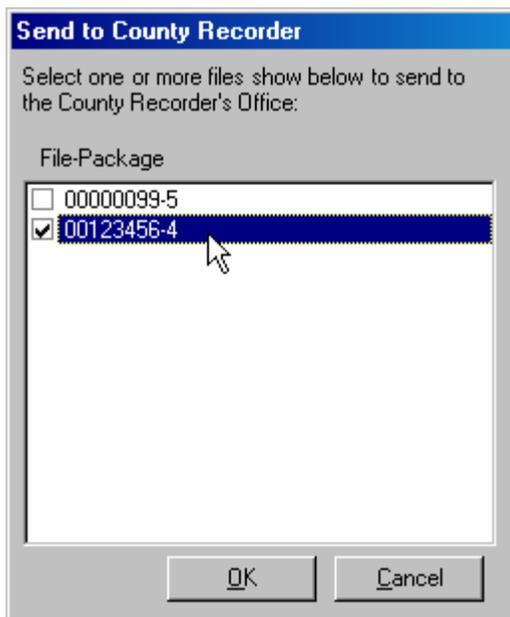
Click on the **County** drop down list arrow to select the correct County Recorder's Office, or press **F4** and use the down or up arrow keys.



Click on **OK** to continue to the **Send to County Recorder** screen. To cancel click on **Cancel**, and then at the blank **Send to County Recorder** screen, click on **Cancel** again.

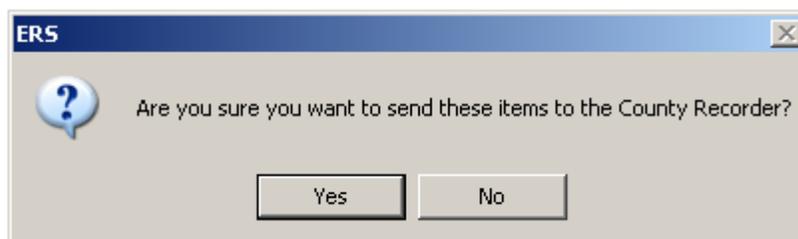
To select an ERS file on the **Send to County Recorder** screen, click on the file number in the **File-Package** area of the screen. Because ERS automatically assigns an ERS internal **Package No** identification number in order to group the scanned documents into one package, the ERS file is listed on the screen below, as the file number, a dash (-), and the **Package No**, for example, ERS file number 00123456 with **Package No** 4 assigned to the ERS file will be listed as 00123456-4.

Click on each file to be sent to the County Recorder's Office. A check mark will be displayed to the left of each item selected. To unselect a checked item, click on the checked item again.



Click on the **OK** button to send the selected files, or **Cancel** to return to the ERS desktop.

A confirmation dialogue box will pop up. Press **ENTER** or click on **Yes** to send the selected files, alternatively, click on **No** to return to the **Send to County Recorder** screen.



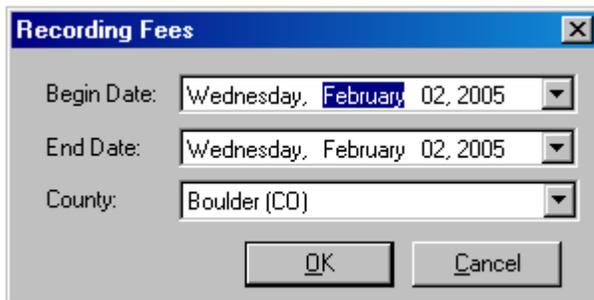
After a few minutes, depending on the number of files being sent, the system will send a notification to the e-mail addresses selected in the **Select Parties to Notify** dialogue box. See the **New** description in the **File Menu** section above for details about the **Select Parties to Notify** dialogue box.

To check on the status of any package, select **File > Open**, then type in the escrow number in the **File Number** field, press **TAB**, double-click on the **Package ID**, and then view the **Information for Package** on the right side of the screen. See the **Open** description in the **File Menu** section above for details about the **Information for Package No** area of the screen.

Recording Fees

Select **Recording Fees** to create a report that lists the County Recorder's Office fees that have been incurred for the recording of submitted documents, based on the date range selected (including both dates) for the selected county.

To change the date in the **Begin Date** field, either click on the drop down list arrow to display the calendar tool and then click on the desired date, or alternatively, use the up and down arrow keys to increase or decrease the highlighted month, date, or year value. Use the right and left arrow keys to move between the month, date, and year areas of the **Begin Date** field.



If appropriate, change the date in the **End Date** field in the same manner as in the previous step.

Depending on company configuration, the **County** field may be pre-filled with a default **County** name and be deactivated (dimmed out). If not deactivated, to select a **County** name use the function key **F4** for accessing the drop down list box, or you may click with the mouse on the down arrow.

NOTE: The only counties shown on the drop down list are those with **ACH** or **Draw Down** selected as the **Payment Type** on the **County Details** screen. See the **Counties** section in the Electronic Recording System Administrator Manual for details.

Click on **OK** to print, or **Cancel** to abort any changes and 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.



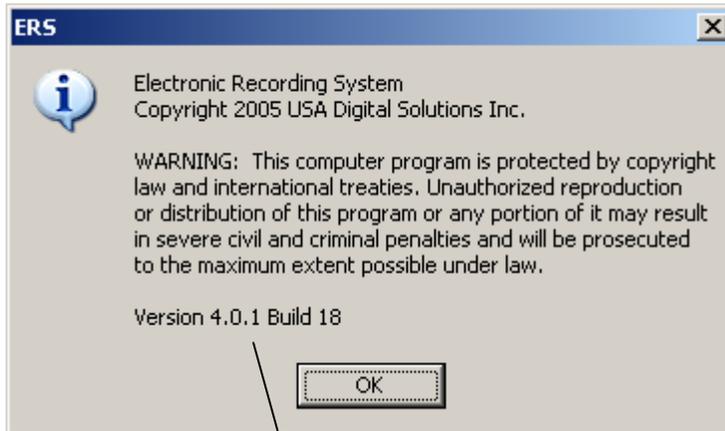
The image shows a standard Windows-style dialog box titled "Change My Password". It contains two text input fields, one labeled "Enter Password:" and another labeled "Confirm Password:". Below these fields are two buttons: "OK" and "Cancel". The dialog box has a blue title bar and a gray background.

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.