DATATREE

Data Tree For The Desktop

Preface

Welcome to Data Tree for the Desktop. This *Administrator's Guide* will explain how to install Data Tree on local users' desktops, how to configure it for most efficient use, and how to troubleshoot any unexpected system events you may encounter.

This guide is intended for users who serve as system administrators for their companies, either as all or part of their job. It assumes you are familiar with your office's local area network (LAN), and with your company's wide area network (WAN), if you connect to one. In addition, if you use an external title plant provider, this guide assumes that you are familiar with connecting to and configuring that system.

What is Data Tree for the Desktop?

Data Tree for the Desktop delivers public land records to your users' desktops via a connection to the main Data Tree operations center, where the image database is stored. Users may order documents from this database and print or view them on their desktop.

Once the documents are ordered and downloaded, they may be stored locally (either on a local server or right on the workstation), printed, or emailed, as appropriate and necessary.

Data Tree employs "push technology" to ensure that you never have to wait for or manage a software upgrade. When each user connects, Data Tree verifies that the connecting computer has the latest version of the system, and, if not, automatically installs an upgrade.

Note: Each local user must have certain directory permissions to enable this feature. See "Automatic Updates" on page 6 for more information.

As an administrator, you can also add, change, and delete user records to control access to your Data Tree account.

All users can configure and maintain various local settings. Since these settings require some knowledge of computers, networks, and your LAN/WAN configuration, they are covered in detail in this manual. They are also covered in less detail in the *User's Guide.*

See Chapter 2 on page 9 for more information about how Data Tree interacts with your local and wide area networks.

Conventions Used in this Guide

This guide uses the following conventions:

➤ Items in **bold** are menus, commands, or fields most important to performing a step.

➤ Notes indicate supplementary information that may be useful.

➤ Tips are handy shortcuts or other aids that the customer hotline or other users have discovered.

➤ Cautions indicate important information that may affect your data or how you use the system.

Getting Help

Data Tree is committed to providing excellent customer service. We have provided the following methods to assist you:

➤ Online help, Quick Reference cards, a *User's Guide,* and this *Administrator's Guide*

➤ A technical support hotline

Online Help and Guides

Included with your Data Tree System are several friendly guides:

➤ This guide, which provides background on and instructions for using various administrative features such as local settings, etc.

➤ A *User's Guide*, which provides step-by-step instructions for the standard procedures necessary to use Data Tree to order public land records.

➤ An online help file, which provides complete, context-sensitive reference material describing each element of Data

Tree's user interface. Click then click a field to get

help for that field, or press **ALT+F1** to get help for the entire dialog.

➤ A set of Quick Reference cards that make it easy for users to complete day-to-day tasks, such as ordering documents.

Technical Support

Data Tree provides 24/7 access to the operation center so that you can connect and retrieve documents when it's convenient for you.

If you have trouble accessing the database, including difficulties with records not being found, poor-quality documents, or mis-indexed documents, or if you have technical questions or issues with Data Tree itself, call our technical support hotline:

1-800-708-8463

You may also visit our web site at:

www.datatree.com

If you have difficulties establishing an Internet connection, please contact your Internet Service Provider.

For new service and equipment sales, billing and contract questions, to schedule training or find out schedules on new county database availability, contact your Client Services Manager at 1-800-789-7244.

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Chapter 1:
Installing Data Tree for the Desktop

Before you install Data Tree for the Desktop, you should understand the environment within which the application works locally and connects to a larger system.

There are two basic ways to connect to the Data Tree Operations Center, where documents are stored:

➤ Via the Internet using a dial-up or cable modem/DSL connection

➤ Via a direct connection, establishing a WAN node, using a router and standard telecommunications frame relay system

Connecting via the Internet

In this environment, Data Tree provides you with our publicly-available IP address, which you specify in Data Tree Settings:
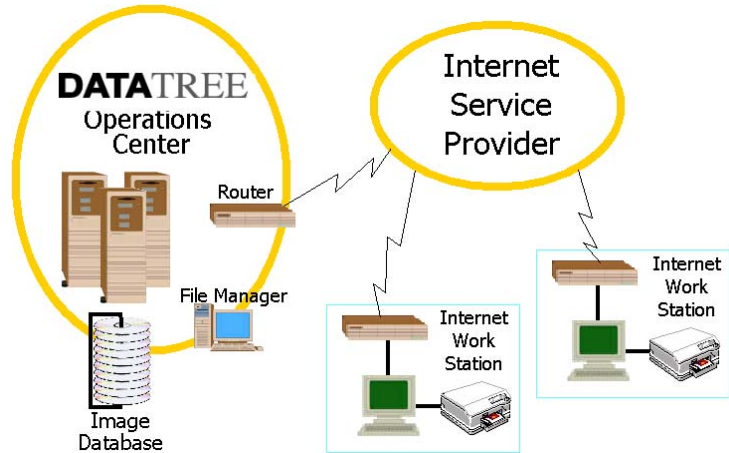
Note: You must have a working/active Internet connection.

Connecting via Direct Access

In this environment, you set up a router to connect to the Data Tree Operations Center, making it a node on your WAN:
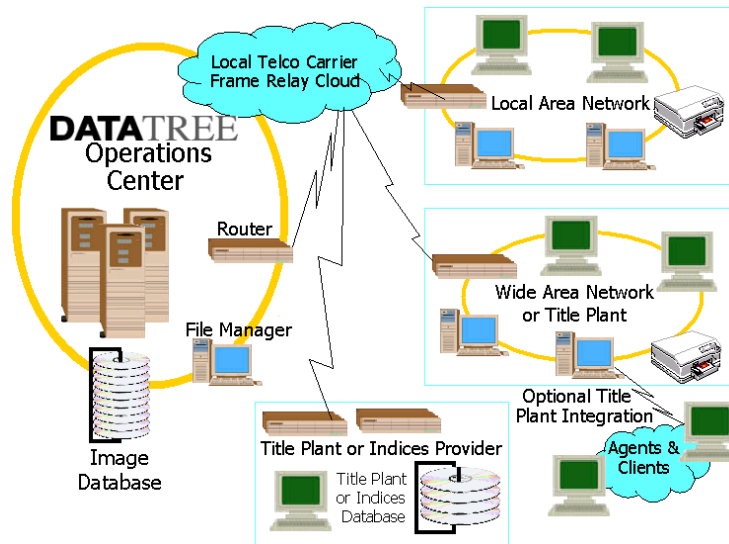
System Requirements

Data Tree has the following requirements.

Desktop Requirements

➤ **Processor:** Pentium 90 or higher minimum, Pentium III recommended

➤ **Operating System (local):** Windows™ 95/98/2000 or Windows NT 4.0 with the current service pack

➤ **Operating System (network):** any that supports TCP/IP minimum, Window NT recommended

➤ **RAM:** 32 MB minimum, 64 MB recommended

➤ **Disk Space:** 250 MB, on top of what Windows needs free to operate

➤ **Peripherals:** CD-ROM drive, 15-inch VGA monitor minimum, 19-inch SVGA recommended, HP Laserjet-compatible printer (Print Control Language [PCL] capabilities recommended)

Connectivity Requirements

The local workstation initiates all communications. This means all sessions can use an established keyword.

➤ **Connection (if accessing via the Internet):**

Usage volume	Connection choice
50 or fewer documents per day (~1,000 documents per month) per workstation	56.6K modem, standard dial-up telephone line
51–150 documents per day (more than 1,000 documents per month) per workstation	cable modem, DSL, or ISDN service
more than 150 documents per day per workstation	direct networks connection (see next bullet)

➤ **Connection (if accessing via direct network):** based on typical LAN/WAN networking topologies and Telco frame relay circuits from Customer's location to Data Tree's hub location in the state provided by Customer

Usage volume	Bandwidth required
up to 5,000 documents per month	128K
up to 40,000 documents per month	256K
up to 60,000 documents per month	384K
up to 200,000 documents per month	T1

➤ **Email:** SMTP or MAPI4 if users will email documents from within Data Tree. See "Defining Email Settings" on page 19 for more information about these standards.

➤ **Routing:** All workstations must be able to connect to the Internet via the publicly-available IP address provided by Data Tree, using either a static routing or default gateway. In addition, the firewall or router must be configured to support:

- Network Address Translation (NAT)
- Many-to-one translations

➤ **Proxy Server:** Microsoft Proxy Server. May work on other servers, but not tested.

Note: The Data Tree Operations Center IP address should be included with your installation package. If you did not receive this or have questions, contact the Data Tree Technical Help Desk at (800) 708-8463.

Installing Data Tree

Data Tree runs as a local desktop application. You must install it on each machine where it will be used. Data Tree should not be installed on a network server and run as a distributed application.

Note: If you are installing Data Tree on a Windows NT workstation, you must log in with full administrator privileges before installing. For more information, see your Windows documentation.

Tip: As a convenience, you may copy the installation executable from the CD-ROM to your local network server. You can then install it from that central location, instead of having to carry the CD-ROM to each workstation.

Tip: If you need to run Data Tree as a distributed application, you will need to install Data Tree on a Terminal Server such as Citrix Metaframe®. See "Appendix A: Configuring for Terminal Servers" on page 47.

To install Data Tree:

1. Insert the CD-ROM. Data Tree installation CD includes an auto-run that should start automatically:
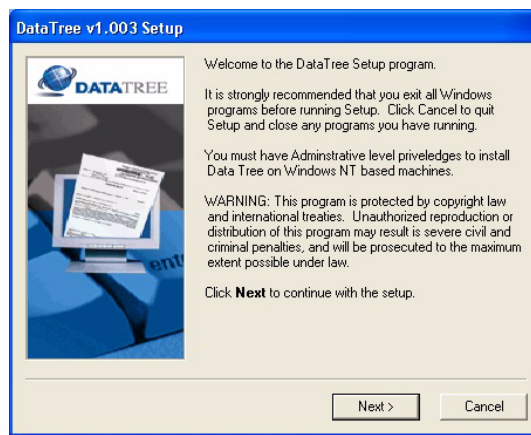
If the setup does not run automatically, or if you are installing from a network drive, open **Start|Run**, browse to the drive, and select DataTreeClientSetup.exe.

2. Follow the instructions on-screen to install Data Tree, and configure the system.

Automatic Updates

Data Tree provides state-of-the-art push technology to ensure local installations are always current. Local users must have the following permissions to the Data Tree Client Directory:

➤ Read

➤ Write

➤ Delete

➤ Create

If the local user does not have these permissions, the automatic updates and upgrades will not take place and the user will not be able to connect.

Electronic File Management (EFM)

EFM is an optional feature that allows you to store orders on a shared network drive. Use this feature to:

➤ Enhance your users' workflow. For example, one division can search for documents and create all the orders on the system, storing the orders on the network. Another division can then access these orders over the network and process the information. Keep others from modifying orders within a folder by assigning "Read Only" access to that folder.

➤ Retain orders permanently, but still purge users' local drive to conserve disk space. Orders that are stored outside of the Local Folder using EFM (whether on local or network drives) do not expire and are not purged from the system.

Either way, users can move the orders back to the Local Folder and add more document requests to that order as necessary, allowing for a richer, more effective life cycle of the order as it moves through processing.

Note: If you do not have this feature or have questions, contact the Data Tree Technical Help Desk at (800) 708-8463.

To set up EFM

1. Contact your Data Tree customer representative and request an EFM license.

2. Set up a share point on your file server (or other shared network resource).

Tip: Make sure all users have at least read, write, and create rights to this share point.

3. (If necessary) Map a drive on each workstation to point to this share point.

Users can then create folders using this resource and store orders. See Chapter 4 in the *User's Guide* for more information on creating and using folders.

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Chapter 2:
Configuring Data Tree for the Desktop

Data Tree Client Settings enable you and your users to configure and control how Data Tree behaves.

Caution: These features are available to all users, regardless of login type.

Defining Application Settings

Application settings include your customer number (preset by Data Tree) and the IP address used to connect to the Data Tree Operations Center.

1. Select **DataTree | Client Settings**:
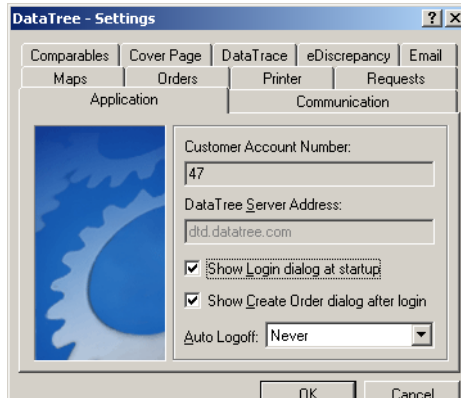
2. Enter the IP address Data Tree provided.

Caution: Only change the IP address at the instruction of a Data Tree customer support representative. If you change this address, you may not be able to connect to the Data Tree Operations Center.

Note: If you are using a dedicated line for connection the line isn't available, you are prompted to connect via an Internet connection. Click **Yes**. The software then connects to the Data Tree network via the Internet. When you are finished, you can log out of Data Tree as usual.

3. Choose the following, as needed:
    *   Check **Show Login dialog at startup** to set Data Tree to prompt users to log in immediately after startup.

- Check **Show Create Order dialog after login** to set Data Tree to prompt users to create a new order immediately after logging in.

- **Auto Logoff** sets Data Tree to automatically log users off after 15, 30, 45, or 60 minutes of inactivity, or to never automatically log users off.

4. Click **OK** to save your changes and return to the main Data Tree window.

Setting Printer Options

Data Tree enables you to customize various printing aspects.

To Set Printer Options

1. Select **DataTree|Client Settings**, if it is not already open.

2. Choose the **Printer** tab:
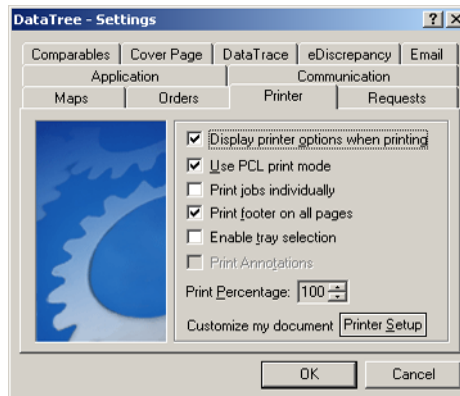
3. Check the following, as needed:

- **Display printer options when printing** sets up Data Tree to show a print dialog each time you print, so you can specify a printer for each print job. Clear this box to use the default printer as set up in Step 5.

- **Use PCL print mode** sets up Data Tree to send PCL instructions to your printer. See "Setting PCL Print Mode" on page 13 for more information. Clear this box to send unformatted printer data.

- **Print jobs individually** sets up Data Tree to send each document to the printer as an individual print job that can be deleted or paused before printing.

- **Print footer on all pages** sets up Data Tree to include a predefined footer on every page. This footer includes the document number, the type of document, the page count, and the order name and description. Clear this box to print without the footer.

- **Enable tray selection** sets Data Tree up to allow users to specify different trays for cover sheets and documents. Data Tree displays a dialog; read the dialog and click **OK** to accept it and use this feature. Clear this box to prevent users from specifying different trays. See "Setting PCL Print Mode" on page 13 for more information.

- **Print Annotations** sets up Data Tree to print any annotations created on a document. Clear this box to print without annotations. Annotations are not available in PCL Mode.

4. Specify the percentage by which all documents should be reduced to fit on the page.

   This can be helpful if documents are larger than the paper you have loaded in your printer. For example, reducing a legal-size document by 75% enables it to fit on a letter-size sheet of paper.

5. Click **Printer Setup** to choose your printer.

   If you are using PCL Mode, additional settings are available. See "Setting PCL Print Mode" on page 13 for more information.

Note: Data Tree will use the default printer specified for your operating system if you do not choose a printer.

6. Click **OK** to save your changes and return to the main Data Tree window.
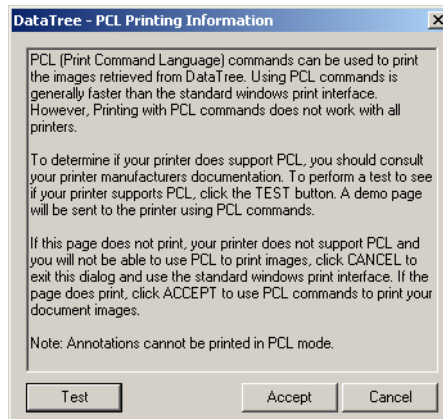
Setting PCL Print Mode

PCL Print Mode enables compatible printers to process the large graphics that comprise a document to print faster. It also allows you to specify different paper bins for your cover sheet (for example, if you want to use colored or specialty paper) and the documents.

To use it, your printer must support PCL (for example, most HP laser printers support PCL). Check your printer's documentation before setting up this option.

1. Select **DataTree|Client Settings**, if it is not already open.

2. Choose the **Printer** tab.

3. Check **PCL print mode**. The PCL Printing Information dialog appears:

> **DataTree - PCL Printing Information**
>
> PCL (Print Command Language) commands can be used to print the images retrieved from DataTree. Using PCL commands is generally faster than the standard windows print interface. However, Printing with PCL commands does not work with all printers.
>
> To determine if your printer does support PCL, you should consult your printer manufacturers documentation. To perform a test to see if your printer supports PCL, click the TEST button. A demo page will be sent to the printer using PCL commands.
>
> If this page does not print, your printer does not support PCL and you will not be able to use PCL to print images, click CANCEL to exit this dialog and use the standard windows print interface. If the page does print, click ACCEPT to use PCL commands to print your document images.
>
> Note: Annotations cannot be printed in PCL mode.
>
> [Test]   [Accept] [Cancel]

4. Read the dialog, then click **Test** to send a test page to your printer.

5. If the test page does not print, click **Cancel** to retain your current printer settings.

or (Optional) If the test page prints, click **Accept** to turn on PCL print mode. The PCL Printer Settings dialog appears:
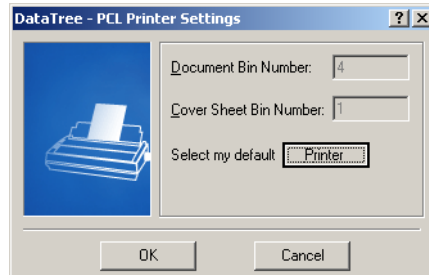
6. Check your printer's documentation to discover the bin identification number for the different paper bins. Use this number to specify which bin to select for cover sheets and for documents.

Note: Disable the bin number edit boxes by turning off tray selection on the Print tab of the setting dialog. See "Setting Printer Options" on page 11 for more information.

7. (Optional) Click **Printer** to choose your printer. For more information on printer settings, see your Windows or printer documentation.

Note: Be sure to select a printer that is PCL-compatible.

8. Click **OK** to save your bin specifications.

9. Click **OK** to save your changes and return to the main Data Tree window.

Including a Cover Page

Data Tree enables you to specify a standard or custom cover page to be included in front of each order. The default cover page is a status report of the documents within an order. For custom cover pages, you must create the cover page in an application that allows you to save your work as a Tagged Image File Format (TIF or TIFF) image, such as PaintShop Pro, Adobe Illustrator, Adobe Photoshop, CorelDRAW!, etc. You can save the image as either a compressed (using only CCITT Group 3 fax, monochrome 200 x 200 dpi) or uncompressed file.

To Include a Cover Page with Documents

1. Select **DataTree|Client Settings**, if it is not already open.

2. Choose the **Cover Page** tab:
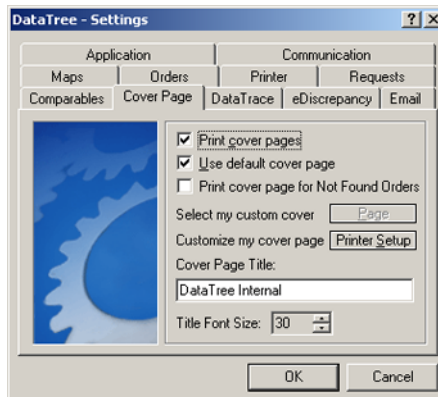
3. Check **Print cover pages** to include a cover page with each order. Clear this box to omit a cover page.

4. Check **Use default cover page** to use the predefined, Data Tree-supplied cover page. If you use the default cover page, you can customize the title (see steps 8 and 9).

or To use a custom page, clear this box. You must specify the custom page (see step 6).

5. (Optional) Check **Print cover page for Not Found Orders** to include whichever cover page you select (default or custom) on Not Found Orders. Clear this box to print Not Found Orders without a cover page.

6. (Optional) Click **Page** to specify a file for the cover page.

Note: You or your users must create one or more cover pages before you can use this option. See Chapter 2 in the *User's Guide* for more information.

7. (Optional) Click **Printer Setup** to specify a printer or additional printer settings.

8. (Optional) If you are using the default cover page, enter a custom title.

9. (Optional) Choose the custom title's font size.

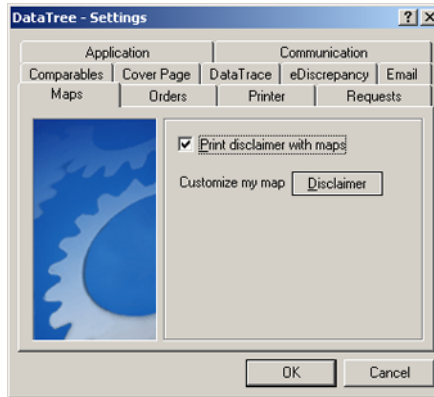10. Click **OK** to save your changes and return to the main Data Tree window.

Configuring Maps

Data Tree enables you to include a disclaimer on each map you print. For example, a disclaimer could indicate that the map is for assessment only, and your company assumes no liability. See "Default Map Disclaimer.tif" installed with product.

For a custom disclaimer, you must create the disclaimer in an application that allows you to save your work as a Tagged Image File Format (TIF or TIFF) image, such as PaintShop Pro, Adobe Illustrator, Adobe Photoshop, CorelDRAW!, etc. You must save the image as 8.5" x 11", CCITT Group 3 fax, monochrome 200 x 200 dpi.

**To Include a
Disclaimer with
Maps**

1. Select **DataTree|Client Settings**, if it is not already open.

2. Choose the **Maps** tab:

3. Check **Print disclaimer with maps** to include a disclaimer on every map you print. You must specify the disclaimer (see the next step). Clear this box to print maps without using a disclaimer.

4. Click **Disclaimer** to choose a TIF file to include as a disclaimer.

5. Click **OK** to save your changes and return to the main Data Tree window.

Configuring Communication

Data Tree can streamline how it passes data across the LAN/ WAN or Internet, depending on how the workstation is set up to connect to the Data Tree Operations Center.

To Specify the Connection Type

1. Select **DataTree|Client Settings**, if it is not already open.

2. Choose the **Communication** tab:
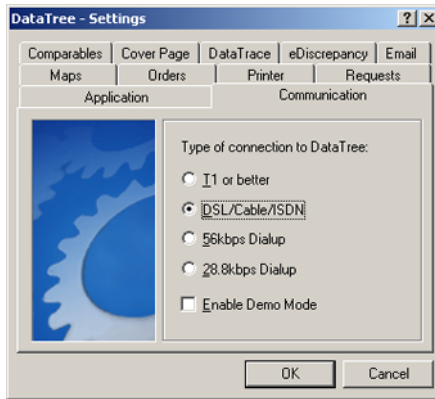
3. Choose the communication type that matches how you connect to Data Tree.

   See "Connectivity Requirements" on page 3 for more information on recommended bandwidth.

4. Click **OK** to save your changes and return to the main Data Tree window.

Defining Email Settings

Data Tree enables you and your users to email documents directly from the system. If your company uses Mail Applications Interface (MAPI)-compliant software (such as Eudora or MS Outlook), Data Tree will pass the document as an attachment to the email software, and users can specify a recipient and send the message directly from a familiar email environment.

If your company uses email software that is not MAPI-compliant (such as Outlook Express), you can set up Data Tree to use its internal custom Simple Mail Transfer Protocol (SMTP)-based email interface to send documents.
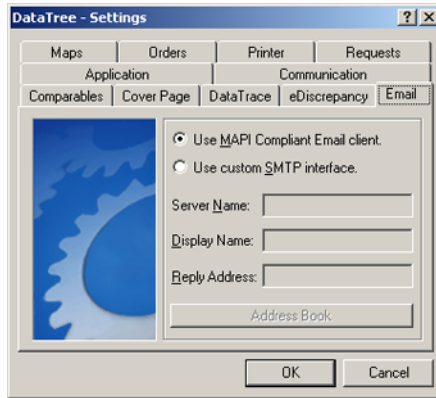
To Set Up a MAPI-based Email Client

1. Select **DataTree|Client Settings**, if it is not already open.

2. Choose the **Email** tab:
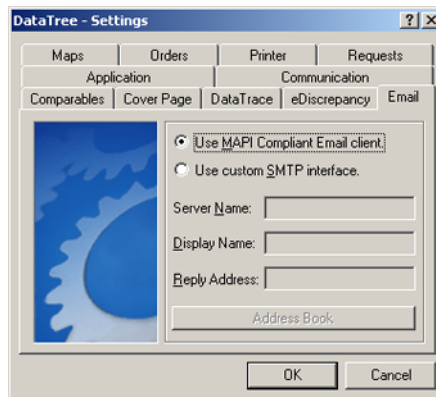
3. Choose **Use MAPI Compliant Email client**.

4. Click **OK** to save your changes and return to the main Data Tree window.

1. Select **DataTree|Client Settings**, if it is not already open.

2. Choose the **Email** tab:

3. Choose **Use custom SMTP interface**.

4. Enter the name of the SMTP server hosting your email.

5. Enter the name that should appear as the source of the email. This can be a name only or it can be a name and email address.

6. Enter the email address that should be used if the recipient wants to reply to the message.

7. (Optional) Click **Address Book** to set up receipient addresses. See "Using the Address Book" on page 21 for more information.

8. Click **OK** to save your changes and return to the main Data Tree window.
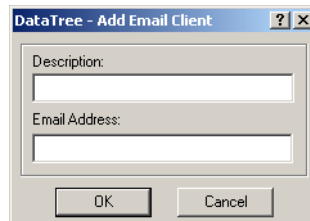
Using the Address Book

If you are using Data Tree internal email interface, you can create and store email addresses for easy reference.

1. Select **DataTree|Client Settings**, if it is not already open.

2. Choose the **Email** tab.

3. Click **Address Book**:
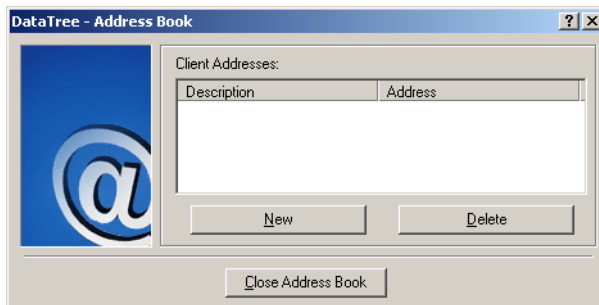
4. Click **New**:

5. Enter a description for the email address. For example, you may want to enter the person's full name.

6. Enter the email address. Be sure to include all necessary punctuation.

7. Click **OK**. If you are done working with the Address Book, click **Close Address Book**.

8. Click **OK** to save your changes and return to the main Data Tree window.

1. Select **DataTree | Client Settings**, if it is not already open.

2. Choose the **Email** tab.

3. Click **Address Book**.

4. Click an email address, then click **Delete**.

5. At the prompt, click **Yes** to delete the email address perma-
   nently or **No** to keep it.

6. If you are done working with the Address Book, click
   Close Address Book.

7. Click **OK** to save your changes and return to the main Data
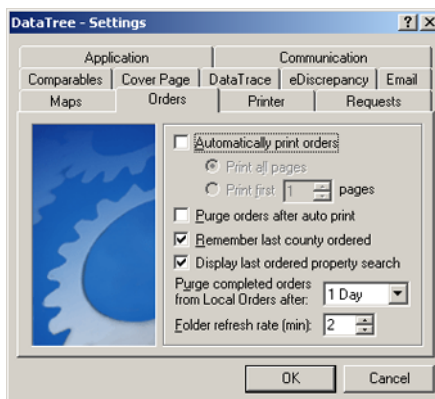   Tree window.

Managing Orders

Data Tree provides you with many options to manage orders.

To Manage
Orders

1. Select **DataTree | Client Settings**, if it is not already open.

2. Choose the **Orders** tab:

3. (Optional) Check **Automatically print orders** to print each order as it reaches PrintQueued status. Clear this box to print orders only when you specify printing.

4. Select **Print all pages** to print all pages in a document

or Select **Print first [#] pages** to specify the maximum number of pages to print from each document. For example, if you want the first five pages from every document, enter **5**. If a document has fewer pages than the number you specify here, the full document will print.

5. Check **Purge orders after auto print** to remove orders from the Local Orders folder immediately after you print them.

6. Select an interval after which all orders stored in the Local Orders folder will be deleted.

Use this option to prevent the local hard disk from filling up with orders that are no longer needed.

Caution: You can choose to never purge document images from the local order folder. Use this option cautiously, as document image files can be large. Too many stored images reduces the amount of hard disk space you have available for new orders and other applications.

Tip: (EFM-licensed users) To retain an order, simply move it to a different folder. Also see "Electronic File Management (EFM)" on page 6 for more suggestions on using folders.

Tip: If the workstation's hard disk drive is smaller than 1GB, set up one or more purge options to prevent the disk from filling up. Since Windows requires a certain amount of free hard disk space to operate, this will prevent system crashes due to insufficient hard disk space.

7. Set the folder refresh rate in minutes.

Use this option if you or other users are moving orders to shared folders to ensure that everyone is viewing the most recent contents of the folder.

Note: You must have an EFM license to use this option.

**Note:** For EFM folders containing many orders, increase the refresh time.

8. Click **OK** to save your changes and return to the main Data Tree window. test

Setting Request Options

Manage how Data Tree processes and handles order requests, including the maximum number of documents that can be included in a single order and other order definition options.

To Set Request Options

1. Select **DataTree | Client Settings**, if it is not already open.

2. Choose the **Requests** tab:
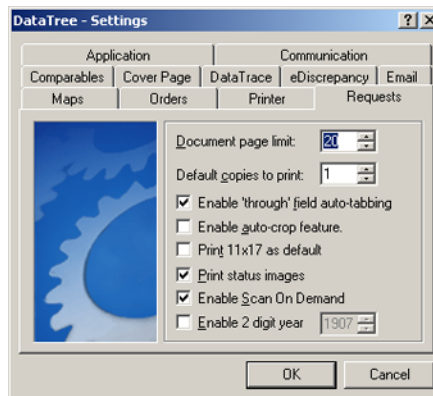
3. Set the maximum number of pages a requested document can contain.

The more pages you include, the longer the request may take to download, the larger the order file will be, and the longer it will take to print.

Note: This sets the default. Users may adjust it per order using the Order Entry dialog.

Set the number of copies of each document the request will include by default when auto printing.

4. Check **Enable 'through' field auto-tabbing** to allow users to tab to the through field when ordering documents. Clear this box to prevent them from tabbing to the field.

    Preventing users from tabbing to the **through** field when ordering documents helps avoid accidentally ordering large ranges of documents. Users can still use the mouse to place the cursor in the field and specify an end-range number.

5. Check **Enable AutoCrop feature** to automatically crop the display of documents to just that area of the page containing information. Empty white space will be trimmed from the display. Clear this box to retrieve the whole page, including the empty white space.

6. Check **Set 11 x 17 as default** to set the default printed page size as tabloid size paper if your printer supports this size.

7. Check **Enable 2 digit year entry** to allow users to type the last two digits of the year (e.g., 00 instead of 2000). Clear this box to require users to type all four digits.

    If you enable this option, you must specify a century point. See the next step for more information.

8. Check **Print status images** to include the placeholder document pages Data Tree creates when requested documents have one of the following statuses: Not Available, Not Online, Best Avail, or Technical Issue. Clear this box to prevent these placeholder pages from printing.

9. Enter a starting year for 1900. Any digits typed that are lower than this number will automatically use the following century.

For example, if you choose 1905 as your starting year for 1900, users can type 01 and the system will understand that to mean 2001. If they type 06, the system will understand that to mean 1906.

10. Click **OK** to save your changes and return to the main Data Tree window.

Setting Up Title Plant Integration Options

The Data Tree system integrates with title plants so users can request documents automatically, tagging them for release to Data Tree. Those documents are then transferred to the user's system at the interval you specify.

Note: The Data Tree license code is preconfigured with your company configuration. This configuration includes whether your workstation has integration access to your title plant.

If you do not see a title plant's tab in the Settings dialog, your company does not have access to this feature. Contact your Data Tree representative at (800) 789-7244.

Tip: Set up Auto Print when using title plants to simplify the ordering process.

1. Select **DataTree | Client Settings**, if it is not already open.

2. Choose the appropriate title plant tab. In this example, the specified title plant is DataTrace. Your tab will specify your company's title plant.
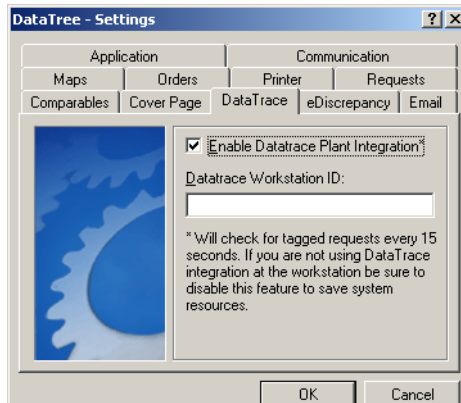
Note: Depending on your title plant, the "Workstation ID" field may not appear on your title plant tab.

3. Check the box to allow this workstation to communicate with the title plant. Clear this box to disable access.

On some title plant tabs, there is an additional field called "Workstation ID." The workstation ID identifies your workstation for the title plant, allowing them to send documents to the workstation that requested them. If you enable title plant integration, you may then be able to edit the "Workstation ID" field.

Caution: Changing your Workstation ID will disable your workstation's access to the title plant. Contact your Data Tree representative at (800) 789-7244 after making any changes to this field. They will update your account information, allowing you to continue tagging documents.The information in this field may vary depending on how your access to Data Tree was set up.

The following table shows what ID you might see in the "Workstation ID" field:

If Data Tree was installed in this way:	You'll see this in the "Workstation ID" field:
You have been tagging documents with Data Tree for a while.	Your login name.
Data Tree just installed the application for the first time.	A three-digit number.
Your company just installed Data Tree for the first time.	Blank.

4. If there is already a workstation ID entered in the field, contact your Data Tree representative after making any changes. They will update your account information.

or If the "Workstation ID" field is blank, enter an ID. You can enter whatever you choose. For example, it may be helpful to enter the machine ID of the computer workstation.

After entering an ID, contact your Data Tree representative to give the ID to them so you can begin tagging documents.

5. Click **OK** to save your changes and return to the main Data Tree window.

Setting Up eDiscrepancy Contact Information

eDisrepancy provides a way for users to report quality concerns by right-clicking on a document. It uses the contact information set up here to ensure that any reply reaches the appropriate person.

1. Select **DataTree | Client Settings**, if it is not already open.

2. Choose the **eDiscrepancy** tab:

3. Enter your company name.

4. Enter the name of a person to be contacted in the event a discrepancy is found.

5. Enter that person's phone number, including extension (if necessary).

6. Enter the number of the fax machine closest to that person's desk. If you choose Email as the contact method, you may leave this field blank.

7. Enter that person's email address, including any pucntuation. If you choose Fax as the contact method, you may leave this field blank.

8. Choose a contact method.

9. Click **OK** to save your changes and return to the main Data Tree window.

Defining Options for a Comparables Report

The Data Tree system integrates with a comparables system so users can order comparables reports. Comparables reports allow users to compare a particular home to others that match certain characteristics. This setting enables users to define default parameters for comparables reports. Users can adjust these defaults each time they order a comparable report, if necessary.

Note: The Data Tree license code is preconfigured with your company configuration. This configuration includes whether your workstation has integration access to the comparables report provider.

If you do not see the Comparables tab in the Settings dialog, your company does not have access to this feature. Contact your Data Tree representative at (800) 789-7244.

1. Select **DataTree | Client Settings**, if it is not already open.

2. Choose the **Comparables** tab:
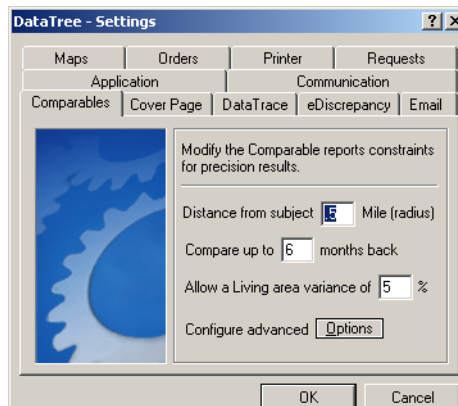
3. Set a radius distance from the target property (in miles).

4. Set the maximum time frame for comparison (in months).

5. Set the living area variance (as a percentage).

   For example, you can exclude properties where the total living area (in square feet) is no more or less than 5% of the target property. If the target property is 3000 sq ft, only properties with living areas totaling 2700 sq ft through 3300 sq ft would appear in the report.

   This enables you to more closely match the comparable properties to the target property, giving you a more accurate comparison.

6. (Optional) Click **Options** to configure more options:

7. (Optional) Specify a range of sales prices to include.

8. (Optional) Specify a range of bedrooms or bathrooms to include.

Tip: Round up partial baths to the next whole number. For example, if you want to include 1.5 baths, enter **2**.

9. (Optional) Specify a range of lot sizes to include.

10. (Optional) Specify any geographic constraints in addition to the radius (such as same city, same zip code, etc.).

11. (Optional) Specify whether to include or exclude properties with pools.

12. Click **OK** to save your changes and return to the main Settings dialog.

13. Click **OK** to save your changes and return to the main Data Tree window.

Chapter 3:
Data Tree for the Desktop
System Security

Data Tree provides a security method so you can control access to the system. These user records enable you to specify a log in name and password for everyone authorized to order documents.

System security is based in part upon your license limit. Data Tree will only allow as many users as you have licenses to be logged in at one time. However, you may create as many user records as you need.
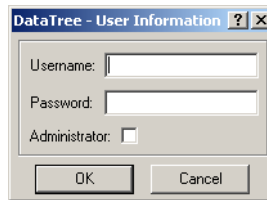
To manage user records, choose **DataTree|User Administration**:
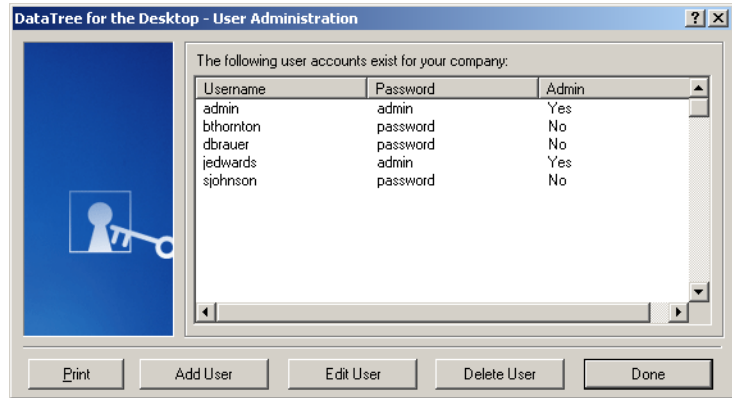
This dialog lists the users you have currently defined.

To Add a User Record

1. Open the User Administration dialog.

2. Click **Add User**:

3. Enter a **Username** and **Password**.

   You can use letters, numbers, or other characters in both the Username and Password fields. System security is case-sensitive.

Tip: Consider using the same username for both the Windows login and the Data Tree login. This makes it much easier for users to track their login information.

Tip: When deciding on passwords, remember that if the password is too easy to remember, it may be very easy for unauthorized persons to guess. If the password is too secure, users may not remember it. Passwords should be at least five characters long. Consider including both numbers and letters, to make it harder to guess.

4. (Optional) If this user should be allowed to manage user records, check **Administrator**. In addition to being able to add, update, and delete users, administrators can see all the users in the system and their passwords. Non-administrators cannot access the User Administration dialog.

5. Click **OK**. The user record appears in the list in alphabetical order.

6. (Optional) Click **Done** to exit User Administration.

To Change a User Record

1. Open the User Administration dialog.

2. Click a user in the list.

3. Click **Edit User**.

4. Make any necessary changes.

5. Click **OK**.

6. (Optional) Click **Done** to exit User Administration.

To Delete a User Record

1. Open the User Administration dialog.

2. Click a user in the list.

3. Click **Delete User**.

4. At the prompt, click **Yes** to delete the user record permanently or **No** to keep it.

5. (Optional) Click **Done** to exit User Administration.

To Print a List of Users

1. Open the User Administration dialog.

2. Click **Print**. A standard Windows print dialog appears.

3. Make changes as required and click **OK**.

Chapter 4:
Troubleshooting Data Tree

This chapter includes some of the situations you or your users may encounter while using Data Tree. Each issue is phrased as a question. Look for the question corresponding to your situation, then read the causes and solutions table for further help.

If your situation does not appear in this chapter, or if none of the solutions repair the problem, contact the Data Tree technical support hotline. See "Technical Support" on page iv for more information.

This chapter discusses troubleshooting documents that may be flagged as different statuses. See the *User's Guide* for a more detailed description of Data Tree statuses.

Program Messages

Why did I get a "New Version" message?

Data Tree has made it easy for you to have the most recent version of Data Tree. Each time you log on, the Data Tree Operations Center checks to see what version of the system you are running. If there is a more recent version available, the system pushes that new version to your system.

There are two possible messages you will see:

➤ One requires you to download the most recent version:
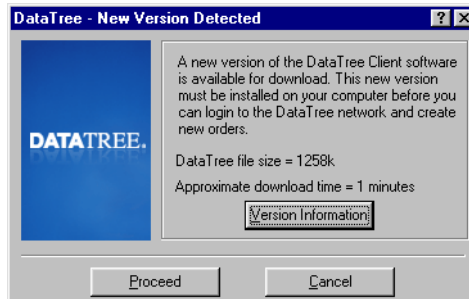
When you see this message, it means there is a more recent version than the one you are currently running. Click **Proceed** and Data Tree will automatically update your local installation.

Caution: If you click **Cancel**, you will not be able to connect to Data Tree. You must have the most current version to connect.

➤ The other message informs you there is a newer version available, but you are not required to download it to proceed:
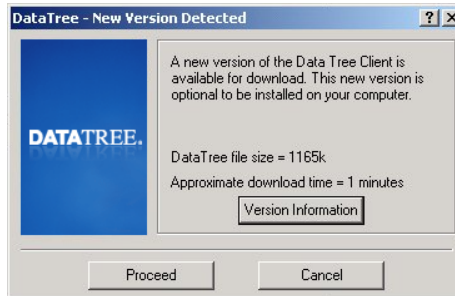
Click **Proceed** to automatically update your system.

or Click **Cancel** to continue using the previous version of Data Tree.

Note: Although you do not have to update your system to proceed, we recommend you do so to ensure you are running Data Tree at the best possible performance.

Status Messages

I disabled the title plant integration. Why does the title plant name still show up in the status bar?

Not all users want or need to tag title plant software to locate documents. Since Data Tree tracks title plant usage by company, the system's status bar will still identify the title plant connection, even if you disable the option.

Why is a document stuck in "Requesting"?

Possible Causes	Possible Solutions
You may have lost the connection to the Data Tree Operations Center.	Wait a few minutes. If the problem persists, contact your system administrator. If you are the system administrator, check the LAN/WAN connectivity.
The Document Server may be down.	Wait a few minutes. Data Tree Service is repairing the server. If this continues longer than 20 minutes, contact the Data Tree technical support hotline to check the server.

Why is a document stuck in "Requested"?

Possible Causes	Possible Solutions
Large documents may take additional time to download.	Wait a little longer. Typical requests take a few minutes, and should take no more than 15 minutes.
You may have lost the connection to the Data Tree Operations Center.	Wait a few minutes. If the problem persists, contact your system administrator. If you are the system administrator, check the LAN/WAN connectivity.
The Document Server may be down.	Wait a few minutes. Data Tree Service is repairing the server. If this continues longer than 20 minutes, contact the Data Tree technical support hotline to check the server.

Why is a document "Not Available"?

Possible Causes	Possible Solutions
The server does not recognize the document number you entered.	Re-type the document number carefully and submit the request again. If the problem persists, the document is not recognized in the image database. Contact the Data Tree technical support hotline.
The document number you entered is newer/older than the date range covered in the database.	Verify the document number and contact the Data Tree technical support hotline. **Note:** The date range on the Order Entry dialog will show the most current document for most document types.
The document is missing from the database and/or from the film inventory at the Scan-On-Demand facility.	Contact the Data Tree technical support hotline.

Why is a document "Not Online"?

Possible Causes	Possible Solutions
The document is missing from the database. The document might be available on film media.	Request the document using eDiscrepancy.

Why is a document "Scan On Demand"?

Possible Causes	Possible Solutions
The document is missing from the database and a request has been forwarded automatically to the Scan-On-Demand facility.	No further action required, unless status changes to "Not Online" (see above).

What does "Technical Delay" Mean?

Possible Causes	Possible Solutions
Data Tree is experiencing a technical problem retrieving the document. **Note:** A message is automatically sent to the Data Tree technical staff, who will investigate and resolve the problem.	No further action, unless the status persists. In the event that is does, contact the Data Tree technical support hotline.

What does "Technical Issue" Mean?

Possible Causes	Possible Solutions
Data Tree is experiencing an unrecoverable technical problem retrieving the document. That is, the document will not appear in your Order folder automatically after the problem is resolved. You will need to order the document again. **Note:** A message is automatically sent to the Data Tree technical staff, who will investigate and resolve the problem.	Contact the Data Tree technical support hotline for information on when you may submit the request again.

Why is a document "Best Available"?

Possible Causes	Possible Solutions
Data Tree's database contains a document image, but that image does not meet Data Tree's image standards (although it may still be readable).	No further action. You are not charged for the document.

Why is a document stuck in "Page Limit"?

Possible Causes	Possible Solutions
The document requested has more pages than specified in the Page Limit default.	Look at the Page Count column to see how many total pages the document has. Adjust the Page Limit on the Order Entry dialog for one more than the document's pages (for example, if the document is 25 pages, set the page limit to 26). Click **Submit Request.** Or, in the Order Entry dialog, right-click on the request. A shortcut menu appears. Select **Resend with no page limit.** See "Setting Request Options" on page 24 of this book or Chapter 2 of the *User's Guide* for more information on page limits.

Why is a document stuck in "PrintQueued"?

Possible Causes	Possible Solutions
You have a printer error.	Check the print spooler or printer for stuck print jobs and clear them. See your printer's documentation for more information.
Data Tree lost connection with the printer.	Right-click on the order and choose **Print Order**. If the problem continues, contact the Data Tree technical support hotline.

Why does a document read "Completed" but nothing prints?

Possible Causes	Possible Solutions
You have turned off automatic printing.	1. Open **DataTree|Client Settings** and choose the **Printer** tab. 2. Check **Automatically Print Orders.** 3. Click **OK**.
There may be print jobs stuck in the spooler or in the printer.	Check the print spooler for stuck or paused jobs and clear them. Check the printer for online status, sufficient paper, etc. See your printer's documentation for more details.
Your print server may be down.	See your systems administrator.
The printer may be turned off.	Turn it on.

Why does a document read "Print Denied"?

Possible Causes	Possible Solutions
There was an error writing to the printer (possibly the document is corrupted or was not completely transferred).	Reorder the document. If the problem continues, contact the Data Tree technical support hotline.

Printing Issues

Why does it take a long time to print documents?

Each document is a scanned image that prints as a full-page graphic. Some printers can take a long time to process large images like this. If your printer supports it, you can change to PCL Print Mode to speed up printing. See "Setting Printer Options" on page 11 for more information.

I am using a Title Plant. I requested documents but nothing printed. Why?

Possible Causes	Possible Solutions
The title plant application is open, but Data Tree is not.	Start Data Tree and connect to the Data Tree Operations Center.
The integration settings between the title plant and Data Tree may be incorrect.	Contact your title plant or Data Tree technical support representative.
There may be a data connection problem between the title plant and Data Tree.	Contact your title plant or Data Tree technical support representative.

Emailing Issues

Why does it take a long time to email a document or order?

Possible Causes	Possible Solutions
Document or order size is very large.	Wait a few minutes.
	Tip: Verify whether your email provider or your recipient's email provider sets a size limit on outgoing messages.
The computer is running slowly.	Close any other applications besides your email client and Data Tree.
The network is busy.	Wait a few minutes. Or send the email at a time when fewer people are using the network.
The email client has ceased responding.	Wait a few minutes to make sure it's not just responding slowly. Then contact your system administrator for more information. If you are the system administrator, make sure users aren't using Outlook Express as it is not MAPI-compliant.

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Appendix A:
Configuring for Terminal Servers

Depending on your network setup, you may need to configure Data Tree for the Desktop with terminal server environments such as Citrix Metaframe®.

Data Tree for the Desktop operates on a terminal server environment differently than other common applications such as Microsoft Word. Data Tree for the Desktop can access many files at one time and queries the DTD File Management folders for new DTD orders that may have been added by different users. In a Terminal Server environment users are virtually operating on the same machine. Paying careful attention to configuration will prevent file locking and permission errors.

The DTD client stores user specific information into either:

➤ the registry (in an unrestricted environment; see "Basic Terminal Server Environments" on page 50 for more information)

➤ an INI configuration file (in a restricted environment; see "Restrictive Terminal Server Environments" on page 52 for more information)

The Data Tree application files can be installed on the Terminal Server using the standard Data Tree for the Desktop Setup application. Once you have installed Data Tree for the Desktop on the Terminal Server, users will be able to access the application from a desktop shortcut or default start menu.

Configuring Terminal Server Environments

Configure a terminal server environment in one of two ways:

➤ "Basic Terminal Server" provides an environment with no special user restrictions and permissions.

➤ "Restrictive Terminal Server" provides an environment with special user restrictions and permissions within the HKEY_CURRENT_USER hive.

Users logging into the Terminal Server must:

➤ have a unique NT Authenticated Login for the Terminal Server

➤ have a Data Tree Login for the DTD client.

➤ have a personal directory located on the Terminal Server.

These configuration instructions assume that there is only one location for the DTD executable.

Registry Settings for Terminal Servers

Configure all registry keys from the perspective of the client workstation, not the perspective of the Terminal Server. The following registry settings are enabled in the HKEY_LOCAL_MACHINE\SOFTWARE\DATATREE\ SETTINGS hive.

Value Name	Type	Description
Application Directory	STRING	Points to the application directory of the DTD client. This key must be from the perspective of the client.
Enable Terminal Server Options	DWORD	Set to 1 to enable; 0 to disable. This setting provides extended Terminal Server options as well as disabling the check for new version functionality.
Terminal Client Home Directory	STRING	Points to the users home directory, usually mapped as 'C:'. Creates the Local order folder for each user in the path 'X;\Datatree\Local.
User Ini File	DWORD	Set to 1 to enable; 0 to disable. Creates an ini file for each unique user within the Terminal Client Home directory for all settings that are usually stored in HKEY_CURRENT_USER in the unrestricted (Basic) environment

Required Keys Whether you create a basic or restricted environment, you must configure the following HKEY_LOCAL_MACHINE\ SOFTWARE\DATATREE\SETTINGS\ keys:

Key	Setting
Enable Terminal Server Options	1
Application Directory	[the directory where Data Tree for the Desktop files reside]
Terminal Client Home Directory	[the directory where the Local Orders folder resides]

Configuration Example

For example, you can configure the Terminal Server to display to the Terminal Server user the Data Tree Client Application folder as P:\Program Files\Datatree\Client. You can map the User home directory to the C:\ drive as the virtual C: drive.

In this example, set the HKEY_LOCAL_MACHINE\ SOFTWARE\DATATREE\SETTINGS\ hive keys as follows:

Key	Setting
Enable Terminal Server Options	1
Application Directory	P:\Program Files\Datatree\Client
Terminal Client Home Directory	C:

These registry keys store the user's local orders within the C:\Datatree\Local directory. If this directory does not exist, it will be created. The User application will access the global.ini file information (such as Company Account numbers and Key Code) from the P:\Program Files\Datatree\Client directory.

Basic Terminal Server Environments

Basic Terminal Server environments do not include special user restrictions and permissions. They can use either a single account ID or multiple account IDs.

Using a Single Account ID

If the workstation uses a single account ID, the workstation client's customized settings are stored in the HKEY_CURRENT_USER key under that workstation's own unique Hive. No registry keys other than the standard required ones (see "Required Keys" on page 49) are required.

Using Multiple Account IDs

In addition to the required registry keys (see "Required Keys" on page 49):

1. Add the following registry setting to the HKEY_LOCAL_MACHINE\SOFTWARE\ DATATREE\CLIENT\SETTINGS hive:

Key Name	Key Value	Value Data
User Defined Company	DWORD	1

2. Add the following registry setting in the HKEY_CURRENT_USER\SOFTWARE\ DATATREE\CLIENT\SETTINGS hive

Key Name	Key Value	Value Data
Company Key Append	STRING	[string]

Whatever you enter as the string, DTD will search in the DTCLIENT.INI file for account information that begins with this string and use the account information it finds to log the user in.

Repeat these steps for **each user** who has a unique ID.

For example, suppose you are setting up a user from the Monarch Title Co. office to access DTD via this client. By entering **MonarchTitle** as the string to the Company Key Append key, you instruct DTD to:

➤ search the DTCLIENT.INI for account information starting with **MonarchTitle**

➤ use the account information it finds to log this user in under the Monarch Title account.

The ini file in this case would contain the following:

MonarchTitle-Company Name=Monarch Title Company
MonarchTitle-Key Code=12081778-5552187
MonarchTitle-Account ID=31900D10D9
MonarchTitle-InternetServerAddress=dtd.datatree.com
MonarchTitle-Last Value=1B0000001B
MonarchTitle-Connection Speed=0000000000
MonarchTitle-EFM Timer=C0D4210085

Consider placing a dash after the string to make the ini file easier to read. If you are setting up DTD users from multiple Account IDs, you can copy and paste all of the company code information into the main DTCLIENT.INI file. The workstation client's Customized DTD settings are stored in the HKEY_CURRENT_USER under their own unique Hive.

Restrictive Terminal Server Environments

Restrictive Terminal Server environments include special user restrictions and permissions within the HKEY_CURRENT_USER hive. These environments can use either a single account ID or multiple account IDs.

Using a Single Account ID

In addition to the required registry keys (see "Required Keys" on page 49), add the following registry setting to the HKEY_LOCAL_MACHINE\SOFTWARE\DATATREE\SETTINGS\ hive:

Key	Setting
User Ini File	1

When you enable this key, the workstation client's customized settings are stored in the C:\Datatree\dtclientlocal.ini file. This file contains the same information that is stored in the Registry in the Basic configuration.

Using Multiple Account IDs

In addition to the required registry keys (see "Required Keys" on page 49):

1. Add the following registry settings in the HKEY_LOCAL_MACHINE\SOFTWARE\ DATATREE\CLIENT\SETTINGS hive:

Key Name	Key Value	Value Data
User Defined Company	DWORD	1
User Ini File	DWORD	1

2. Add the following setting in the DTCLIENTLOCAL.INI file located in the user's Terminal Client Home Directory:

[Settings]
Company Key Append = "(string)"

Repeat step 2 for **each user** who has a unique account ID.

Much like the Company Key Append registry key under a basic terminal server environment, DTD will search in the DTCLIENT.INI file for account information that begins with this string and use this account information to log the user in.

Since you enabled the user ini file registry key, the workstation client's customized settings will be stored in DTCLIENTLOCAL.INI file. This file will contain the same information that would have been stored in the Registry.

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