

**DATA**TREE

Data Tree For The Desktop

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Data Tree for the Desktop V 2.0

# Preface

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Welcome to Data Tree for the Desktop. This guide explains how to use Data Tree to order documents efficiently and maximize your use of the system's workflow benefits.

This guide is intended for users who search for real estate records to complete title examinations, either as all or part of their job. It assumes you are familiar with basic software tasks such as saving, printing, and e-mailing information. It also assumes that you are not the system administrator for your company.

## Conventions Used in this Guide

This guide uses the following conventions:

- Items in **bold** are menu or toolbar selections, or information to be typed in the indicated field.
- Menu selections are separated by a vertical bar (|). For example, **Data Tree | Exit** means select the Data Tree menu, then the Exit option.
- 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, an *Administrator's Guide* and this *User's Guide*
- A technical support hotline

### Online Help and Guides

Included with your Data Tree installation package are several friendly guides:

- This guide, which provides information on using Data Tree's features and tasks.
- An *Administrator's Guide*, which provides background on and instructions for using various administrative features such as local settings, etc.

- 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 you 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**

The Data Tree web site is: [www.datatree.com](http://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:**

## **Getting to Know Data Tree for the Desktop**

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Data Tree for the Desktop electronically captures the same documents you search by hand and delivers them to your desktop. It enables your site to connect to the main Data Tree Operations Center, where the image database is stored. You may then order documents from this database and print them or view them on your desktop. You can also create and manage orders on your network, taking advantage of the workflow benefits inherent in Data Tree.

Once you order and download documents, you may store them locally (either on a local server or right on the workstation), print them, or email them. You are charged only for the documents you receive; the fee is the same regardless of document size. See “Document Status Definitions” on page 19 for more information.


# Starting Data Tree for the Desktop

You must be connected to Data Tree to order documents. Every time you connect to Data Tree, you receive information. Using a username and password protects your company from unauthorized access.

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

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## To Start Data Tree for the Desktop

1. Double-click  on your desktop.
2. Log in.

If your system administrator enabled the **Login at Startup** option, the User Login dialog appears immediately after you open Data Tree:



If this prompt does not appear, click **Connect/Disconnect**  on the Orders toolbar or

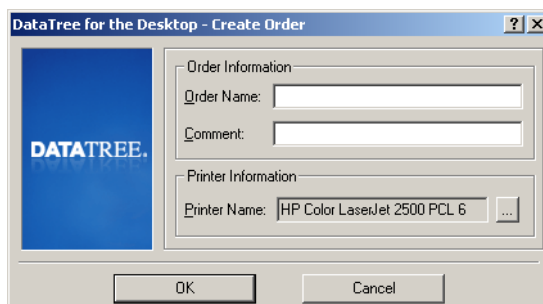
select **Data Tree | Connect to Data Tree**. The User Login dialog appears.

a. Enter your **Username** and **Password**.

**Note:** If you forget your Username or Password, contact your company's local System Administrator. If you do not have a System Administrator, contact the Data Tree help desk. See "Technical Support" on page iii for more information.

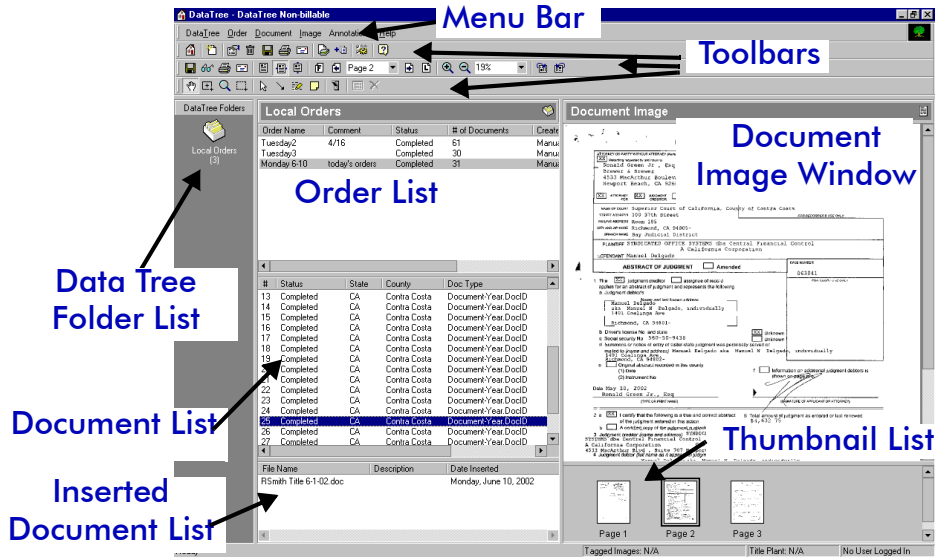
b. Click **Connect**.

You will be prompted to create a new order:



If you want to do this now, see "Creating New Orders" on page 16 for more information. Otherwise, click **Cancel**.

The main Data Tree window appears:



This window is your work space and displays available folders, orders, and documents. Use the menus and toolbars to manage these areas.

## Using Menus and Toolbars

Each menu or toolbar lists distinctive tasks. Many commonly-used tasks are available as either a menu option or toolbar button.

You can also access the menus with your keyboard. One letter in every menu and most menu options is underlined. Press the **Alt** key on your keyboard and the underlined letter to use these shortcuts. For example:

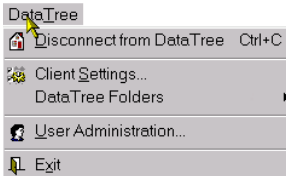
- Press **Alt+DV**: View the selected document.
- Press **Alt+OM**: Modify Order. The Order Entry dialog appears.



**Note:** If you use Windows 2000, press the **Alt** key to make these menu options visible.

## Data Tree Menu

Use the Data Tree Menu to connect or disconnect to Data Tree and to set up your local preferences. The Data Tree Menu provides access to the following features:



- **Connect/Disconnect from Data Tree** connects you to or disconnects you from Data Tree. If you are not connected to Data Tree, this option will read, “Connect to Data Tree.” See “Starting Data Tree for the Desktop” on page 2 for more information.

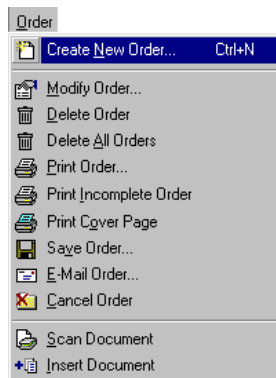
**Note:** You only need to connect to Data Tree if you are ordering documents. Data Tree’s other tasks, such as viewing and emailing documents, are available even if you are disconnected.

- **Client Settings** displays a dialog for you to manage systems settings. See your system administrator for more information. If you are the system administrator, see Chapter 2 in the *Administrator’s Guide* for complete information.
- **Data Tree Folders** displays a dialog where you can create and manage folders. See “Managing Folders” on page 71 for more information.
- **User Administration** displays a dialog where the system administrator can add, edit, or delete your company’s Data Tree user information. If you are not a system administrator, this option is disabled. See your system administrator for more information. If you are the system administrator, see Chapter 3 in the *Administrator’s Guide* for more information.

- **Exit** closes Data Tree and logs you out of the Data Tree image database.

## Order Menu

Use the Order Menu to manage orders. The Order Menu provides the following features:

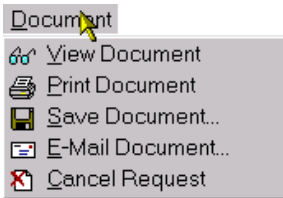


- **Create New Order** displays the Create Order dialog so you can begin the ordering process. See “Creating New Orders” on page 16 for more information.
- **Modify Order** displays the Order Entry dialog so you can adjust the selected order as necessary. This option is only available when you are viewing orders in the Local Orders folder. See “Modifying Orders” on page 33 for more information.
- **Delete Order** deletes the selected order. See “Deleting Orders” on page 34 for more information.
- **Delete All Orders** deletes all completed orders.
- **Print Order** prints the selected order. See “Printing Orders” on page 35 for more information.
- **Print Incomplete Order** prints the selected incomplete order. See “Printing Incomplete Orders” on page 37 for more information.
- **Print Cover Page** prints only the cover page. See “Using Cover Sheets” on page 45 for more information.
- **Save Order** displays save options for the selected order. See “Saving Orders” on page 38 for more information.
- **Email Order** displays a list of the selected order’s documents. You can choose one or more of them to email. See “Emailing Orders” on page 40 for more information.
- **Cancel Order** cancels the selected order. See “Cancelling Orders” on page 30 for more information.

- **Scan Document** displays the Scan Document dialog where you can use a scanner connected to your computer or network to add a document to the selected order. See “Scanning Documents” on page 48 for more information.
- **Insert Document** displays the Insert Document dialog where you can add a saved document to the selected order. See “Inserting Documents” on page 49 for more information.

## Document Menu

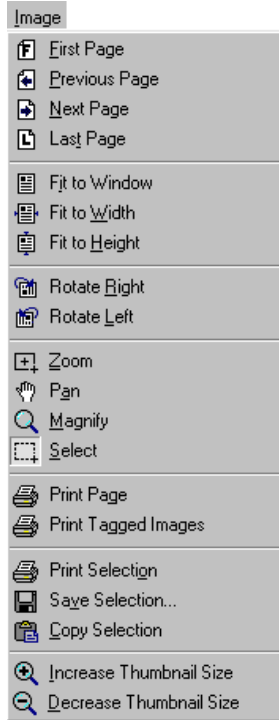
Use the Document Menu to help you manage documents in an order. The Document Menu provides the following features:



- **View Document** shows the selected document in an independent Document View window. See “Viewing Documents” on page 52 for more information.
- **Print Document** prints the selected document. See “Printing Documents and Pages” on page 62 for more information.
- **Save Document** displays save options for a selected document. See “Saving Documents” on page 64 for more information.
- **Email Document** displays the Attachment List so you can choose the format to email your document. See “Emailing Documents” on page 66 for more information.
- **Cancel Request** cancels a request.

## Image Menu

Use the Image Menu to view your documents. See “Viewing Documents” on page 52 for more information. The Image Menu provides the following features:

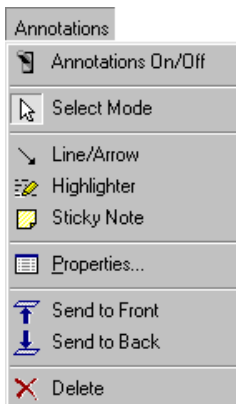


- **First Page** displays the first page of the selected document.
- **Previous Page** displays the previous page of the selected document.
- **Next Page** displays the next page of the selected document.
- **Last Page** displays the last page of the selected document.
- **Fit to Window** fits the document image so the entire image is shown in the Document Image window.
- **Fit to Width** fits the document image to the width of the window.
- **Fit to Height** fits the document image to the height of the window.
- **Rotate Right** rotates the document image clockwise.
- **Rotate Left** rotates the document image counter-clockwise.
- **Zoom** turns your cursor into a cross-hatch. Click and drag to define the area you want to zoom in on.
- **Pan** turns your cursor into a hand. Click and move the document image up and down, sideways, or diagonally.
- **Magnify** turns your cursor into a magnifying glass. Click on an area to magnify it.
- **Select** turns your cursor into a cross-hatch. Click and drag to select an area. See “Selecting Part of an Image” on page 55 for more information.
- **Print Page** prints only the viewed page.

- **Print Tagged Images** prints any images you’ve tagged. See “To Print Several Non-Continuous Pages” on page 64 for more information.
- **Print Selection** prints an area you’ve selected. See “Selecting Part of an Image” on page 55 for more information.
- **Save Selection** saves an area you’ve selected. See “Selecting Part of an Image” on page 55 for more information.
- **Copy Selection** copies an area you’ve selected to the main clipboard. You can then paste it into other applications. See “Selecting Part of an Image” on page 55 for more information.
- **Increase Thumbnail Size** increases the size of the document page thumbnails. See “Using Thumbnails” on page 60 for more information.
- **Decrease Thumbnail Size** decreases the size of the document page thumbnails. See “Using Thumbnails” on page 60 for more information.

## Annotations Menu

Use the Annotations Menu to create notes on your documents. See “Annotating Documents” on page 57 for more information. The Annotations Menu provides the following features:



- **Annotations On/Off** displays or hides annotations.
- **Select Mode** enables you to use your cursor to select an annotation on a document.
- **Line/Arrow** turns your cursor into a drawing tool that creates lines and arrows.
- **Highlighter** turns your cursor into a highlighting pen, which you can use to highlight selected areas of a document.


- **Sticky Note** turns your cursor into a cross-hatch, which you can use to create a visual “post-it” on a document.
- **Properties** displays font and color options for the annotation.
- **Send to Front** places the annotation on top of the document or other objects.
- **Send to Back** places the annotation behind the document or other objects.
- **Delete** removes the annotation from the document.

## Help Menu

Use the Help Menu when you need assistance performing a task or understanding a feature. The Help Menu provides the following features:



- **Contents** displays the Help Table of Contents.
- **Test Connection** enables you to verify you are properly connected to the Data Tree Image Delivery Center.
- **Data Tree Website** opens the Data Tree web site using your default browser.
- **About DataTree** opens a dialog that displays the software version number, copyright, and development information.

**Tip:** Click  then click a field to get help for that field, or press **ALT+F1** to get help for the entire dialog.

## Order Toolbar

Use the Order toolbar for quick access to commonly-used tasks from the Data Tree, Order, and Help menus.

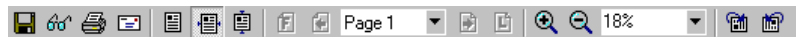


The buttons on the Order toolbar, from left to right, are as follows:

- **Connect/Disconnect** connects or disconnects you from Data Tree.
- **Create New Order** displays the Create Order dialog so you can begin the ordering process.
- **Modify Order** displays the Order Entry dialog for a complete order.
- **Delete Order** deletes a selected order.
- **Save Order** displays the save options for the selected order.
- **Print Order** prints a selected order.
- **Email Order** displays the Attachment List of the selected order's documents that you can email.
- **Scan Document** displays the Scan Document dialog where you can use a scanner connected to your computer or network to add a document to the selected order.
- **Insert Document** displays the Insert Document dialog where you can add a saved document to the selected order.
- **Client Settings** displays the Client Settings menu where you can change your default settings.
- **Help** displays the Help topics.

## Document Toolbar

Use the Document toolbar for quick access to commonly-used tasks from the Document and Image menus. See “Viewing Documents” on page 52 for more information.



The buttons on the Document toolbar, from left to right, are as follows:

- **Save Document** displays save options for a selected document.

- **View Document** shows the selected document in the Document View window.
- **Print Document** prints the selected document.
- **Email Document** displays the Attachment List so you can choose a format in which to email your document.
- **Fit to Window** fits the document image so the entire image is shown in the Document Image window.
- **Fit to Width** fits the document image to the width of the window.
- **Fit to Height** fits the document image to the height of the window.
- **First Page** displays the first page of your selected document.
- **Previous Page** displays the previous page of your selected document.
- **Page Number Dropdown** allows you to select which page of the document you want to view.
- **Next Page** displays the next page of your selected document.
- **Last Page** displays the last page of your selected document.
- **Zoom In** enlarges the document image.
- **Zoom Out** decreases the size of the document image.
- **Document View Size** allows you to select the document's view size percentage.
- **Rotate Right** rotates the document image clockwise.
- **Rotate Left** rotates the document image counter-clockwise.

## Annotations Toolbar

Use the Annotations toolbar for quick access to commonly-used tasks from the Annotations and Image menus. See



“Annotating Documents” on page 57 and “Viewing Documents” on page 52 for more information.



The buttons on the Annotations toolbar, from left to right, are as follows:

- **Pan** turns your cursor into a hand, which you can then use to click and move the document image up and down, side-ways, or diagonally.
- **Zoom** turns your cursor into a cross-hatch, which you can then click and drag to define the area you want to zoom in on.
- **Magnify** turns your cursor into a magnifying glass, which you can use to click on an area to magnify it.
- **Select** turns your cursor into a cross-hatch, which you can then use to select an area.
- **Select Annotation Object** enables you to use your cursor to select an annotation on a document.
- **Line/Arrow** turns your cursor into a drawing tool that creates lines and arrows.
- **Highlighter** turns your cursor into a highlighting pen, which you can use to highlight selected areas of a document.
- **Sticky Note** turns your cursor into a cross-hatch, which you can use to create a visual “post-it” on a document.
- **Turn ON/OFF Annotations** toggles the annotation view on or off.
- **Annotation Properties** displays font and color options for the annotation.
- **Delete Annotation** removes the annotation from the document.



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## **Chapter 2:**

# **Creating and Managing Orders**

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Orders are documents or groups of documents that you download from the Data Tree Operations Center onto your desktop. They appear in the Data Tree window. You can:

- modify existing orders to include additional documents.
- print all or some of the documents in an order,
- e-mail a selection of documents in an order, and you can also
- delete orders to conserve space on your hard disk.

# Creating New Orders

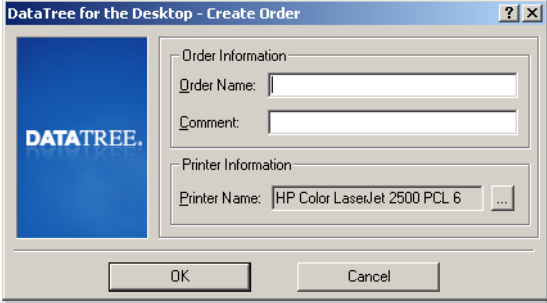
Create a new order to group and store related document requests.

---

## To Create a New Order

1. Click **Create New Order**  on the Order toolbar or select **Order | Create New Order**.


The Create Order dialog appears:



The dialog box is titled "DataTree for the Desktop - Create Order". It features a blue square with the "DATATREE." logo on the left. On the right, there are two sections: "Order Information" with fields for "Order Name:" and "Comment:", and "Printer Information" with a "Printer Name:" field showing "HP Color LaserJet 2500 PCL 6" and a button with three dots. At the bottom are "OK" and "Cancel" buttons.

**Note:** Your system administrator may have set Data Tree to prompt you to begin creating new orders as soon as you log in.

If you aren't logged in when you select **Create New Order**, the system prompts you to log in.

2. Enter a name for your new order. Typically, this name is a standardized number such as a customer ID number.
3. Enter any comments about the order. Typically, the comment will provide additional detail about the order name.
4. The name of the default printer appears in the Printer Name field. Click  to choose a different printer for this order.

5. Click **OK**. The Order Entry dialog appears:

[illegible]

**6.** Select a state and a county.

7. Select a type of document:

- Assessor Map
- Daily Documents
- Parcel Map
- Record Map
- Tract Map
- Starters/Bases

**Note:** Since Data Tree matches the document types available if you were to search these records manually, the document types vary depending on the county you search.

8. Enter the **Document Information**.

**Note:** Since Data Tree matches the document information required if you were to search these records manually, the necessary Document Information varies depending on the type of document.

9. (Optional) Set up this order's printing:

- a. Check the **Auto Print** box.
- b. Check **11 x 17** to print on tabloid size paper if your printer is equipped to do so.
- c. Click **All Pages** to print all the document pages.

**or** Click **Print First** to specify a maximum number of pages to print from each document. Click the up or down arrows to increase or decrease the number of pages.

For example, if you want the first five pages from every document, select or enter **5**. If a document has fewer pages than the number you specify here, the full document will print.

**Note:** If you would like Auto Print to be set up as the default for the system, contact your system administrator. If you are the system administrator, see "Managing Orders" on page 86 or Chapter 2 of the *Administrator's Guide* for more information.

10. Click **Submit Request**. The documents are requested and begin to download.

**Tip:** Check your information carefully before submitting the request. You are charged for documents once they are delivered to your local system (PrintQueued or Completed status; see pages 19 and 20).

## Document Status Definitions

Status	Definition	Necessary Action
Requesting	Data Tree for the Desktop is sending the request to the Operations Center.	Wait a few minutes for the request and download to complete. You may cancel a request in this status without being charged.
Requested	The image database has received the request and the documents are downloading.	Wait a few minutes for download to complete. You may cancel a request in this status without being charged.
Completed	The documents are downloaded (and printed, if you are set up to automatically print orders).	To print or view, click <b>Close Order</b> . See “Managing and Viewing Documents” on page 51 for more information. <i>Once a document reaches this status, you are charged for it.</i>
Not Found	A document with the information you specified could not be found.	Modify the Document Information and click <b>Submit Request</b> . You will not be charged for a request in this status, but you cannot cancel it.
Page Limit	<p>The requested document has more pages than the page limit allows.</p> <p><b>Tip:</b> In the Order Entry dialog, right-click on the request. A shortcut menu appears. Select <b>Resend with no page limit</b>.</p>	<p>Check the Page Count column. This tells how many 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 <b>Submit Request</b>. You may cancel a request in this status without being charged.</p> <p><b>Note:</b> The Page Limit has been set by the system administrator, but can be changed for individual orders using the Order Entry dialog. If the Page Limit is consistently too low, see your system administrator. If you are the system administrator, see Chapter 2 of the <i>Administrator’s Guide</i> for more information.</p>

Status	Definition	Necessary Action
Cancelled	The order or request was cancelled.	If the order or request was cancelled in error, recreate the request. See “Creating New Orders” on page 16 for more information. If the order or request was not cancelled in error, this shows that the order or request cancelled correctly.
Page # of #	Pages # out of # have been downloaded, but not the entire document.	Wait a few minutes for the download to complete. You may cancel a request in this status without being charged.
PrintQueued	The order or document is waiting to print.	Close the Order Entry dialog if it isn’t already closed. Wait a few minutes for the document or order to print. <i>Once a document reaches this status, you are charged for it.</i>

**Note:** See your system administrator for more information on status problems. If you are the system administrator, see Chapter 4 in the *Administrator’s Guide* for more information.

You may cancel any submitted request. If the document has reached PrintQueued or Completed status, you will be charged for it, even if you cancel. See “Cancelling Requests” on page 31 for more information.

Once you have submitted a request, you can close the Order Entry dialog, even if the documents are not fully downloaded. The main Data Tree window will continue to track and display status information. You can cancel an entire order from the main window. See below for more information.

**Caution:** If you accidentally entered the wrong document information, cancel your order **before closing the Order Entry dialog**. You may not be able to cancel the order



from the main window fast enough to avoid being charged.

When you have created a new order, it appears in the Order List window.

## Using a Title Plant to Create Orders

If your company uses a title plant, that plant may be integrated with Data Tree. If it is, you may use the title plant to create and place orders via Data Tree. See your system administrator for more information on integrating title plants and Data Tree for the Desktop. If you are the system administrator, see Chapter 2 in the *Administrator's Guide* for more information.

**Note:** You must have both Data Tree for the Desktop and the title plant software open to receive and view orders placed with a title plant.

Generally, your system will be configured to automatically print orders retrieved using a title plant.

You may always use Data Tree for the Desktop to view completed orders at any time after placing orders, whether they were placed using a title plant or directly through Data Tree.

## Searching for Documents

You can search the Data Tree document image repository for documents using a property street address, a property owner name, or an Assessor Parcel Number (APN). After you retrieve property information relevant to your search, you can select which documents to include in your order.

You can search for a particular property, or documents about a particular property, anytime you create or work with an order.

- The Order Entry dialog appears:

2. Click **Property Search** to search for documents.

The General Property Search dialog appears:

From here, you can search by street address, property owner name, or APN. Keep the following in mind as you search:

- None of the search fields are case-sensitive. That means you can enter **street**, **Street**, or **STREET** and you'd receive the same results.
- Data Tree can return up to 20 properties matching your search criteria. If your search returns 20 records, and none of them are the property you are looking for, enter additional criteria to narrow your search.

---

### To Search by Street Address

1. From the General Property Search dialog, select **Street Address** if it's not already selected.

Enter as much information about the property as you know in the dialog's fields.

**Note:** All the fields are required, except the Pre Dir, Post Dir, and Unit number fields. You must enter either a Zip Code *or* a city and state.

2. Enter a house number.

**Tip:** Use a dash (-) to search a range of house numbers. That way, you could find several properties on the same street. For example, if to find all properties with street numbers between 800 and 2900, enter **800-2900**.

**Note:** You can only enter numbers in this field.

3. Select a compass direction from the **Pre Dir:** drop down list if there is a direction that *precedes* the street name. For example, if the street address was 550 West Front Street, select **W**.

4. Enter the street address.

**Tip:** If you don't know the complete street name, use an asterisk (\*) as a "wild card". For example, if you know the street name starts with Rock, enter **Rock\***. Data Tree will retrieve properties with street names like Rockwell or Rockwood.

5. Enter the street's suffix.

**Note:** Use the following suffix abbreviations:

Use this abbreviation:	For this suffix:	Use this abbreviation:	For this suffix:
ALY	Alley	LN	Lane
ARC	Arcade	LOOP	Loop
AVE	Avenue	MALL	Mall
BLVD	Boulevard	MNR	Manor
BR	Branch	OVAL	Oval
BRG	Bridge	PARK	Park

Use this abbreviation:	For this suffix:	Use this abbreviation:	For this suffix:
BY	Bypass	PASS	Pass
CYN	Canyon	PATH	Path
CSWY	Causeway	PIKE	Pike
CTR	Center	PKY	Parkway
CIR	Circle	PL	Place
CT	Court	PLZ	Plaza
CV	Cove	RD	Road
CRES	Crescent	ROW	Row
XING	Crossing	SQ	Square
EXPY	Expressway	ST	Street
EXT	Extension	TER	Terrace
FWY	Freeway	TUNL	Tunnel
GDNS	Gardens	TPKE	Turnpike
HTS	Height	VIS	Vista
HWY	Highway	WALK	Walk
ISS	Island	WAY	Way
KNLS	Knoll		

6. Select a compass direction from the **Post Dir:** drop down list if there is a direction that *follows* the street name. For example, if the street address was 550 Front Street West, select **W**.

7. Enter the unit number.

**Note:** You can only enter numbers in this field.

8. Enter the name of the city.
9. Enter or select a state.
10. Enter a Zip Code.

**Note:** If the city and state do not match the Zip Code, Data Tree will only search by the Zip Code.

11. Click **Search**. Data Tree searches its repository of documents, and displays those that match the street address in the lower portion of the General Property Search dialog:

APN	Owner ...	Address
71-391-24-1	RASH ...	2914 ROCKWELL

Select	Document Type	Recording Date	Seller	Buyer
<input type="checkbox"/>	REFINANCE	2002-02-12		
<input checked="" type="checkbox"/>	GRANT DEED	2000-11-20	RASH KEVIN ...	RASH K...
<input type="checkbox"/>	GRANT DEED	2000-05-11	WILDHORSE ...	RASH K...

12. Select the documents you want to order by clicking the checkbox.
13. Click **Order** to order the selected documents, or **Exit** to close the dialog. Work with the ordered documents as you do normally.

## To Search by Owner Name

1. From the General Property Search dialog, select **Owner Name**.

The screenshot shows the 'DataTree for the Desktop - Property Search' dialog box. It has three tabs: 'Street Address', 'Owner Name' (which is selected), and 'Assessors Parcel Number'. Under the 'Owner Name' tab, there are fields for 'Owner Last Name' and 'Owner First Name'. Below these are 'State' (a dropdown menu showing 'CA') and 'County (available from: 1/1/1997)' (a dropdown menu showing 'San Diego'). To the right of these is a 'Zip Code' field and a 'Search' button. Below the search fields is a table with columns 'APN', 'Owner Name', and 'Address'. Underneath the table is a 'Property Documents' section with a table that has columns 'Select', 'Docu...', 'Recording Date', 'Seller', and 'Buyer'. Below this table is an 'Order Transaction History' button. At the bottom is a 'Property Reports' section with three checkboxes: 'Legal and Vesting Report', 'Comparables Report', and 'Subject Report'. Each checkbox has a 'View' button next to it. At the very bottom of the dialog are 'Order' and 'Exit' buttons.

Enter as much information about the owner as you know in the dialog's fields.

**Note:** All the fields are required, except the Owner First Name field. You must enter either a Zip Code *or* a city and state.

2. Enter the property owner's last name.

**Tip:** If you don't remember the owner's complete last name, use an asterisk (\*) as a "wild card". For example, if you know the name starts with Jon, enter **Jon\***. Data Tree will retrieve owner names like Jonson or Jones.

3. Enter the owner's first name.
4. Enter or select a state.

5. Select a county.
6. Enter a Zip Code.

**Note:** If the city and state do not match the Zip Code, Data Tree will only search by the Zip Code.

7. Click **Search**. Data Tree searches its repository of documents, and displays those that match the owner's name in the lower portion of the General Property Search dialog:

APN	Owner ...	Address
71-391-24-1	RASH ...	2914 ROCKWELL

Select	Document Type	Recording Date	Seller	Buyer
<input type="checkbox"/>	REFINANCE	2002-02-12		
<input checked="" type="checkbox"/>	GRANT DEED	2000-11-20	RASH KEVIN ...	RASH K...
<input type="checkbox"/>	GRANT DEED	2000-05-11	WILDHORSE ...	RASH K...

Order Exit

8. Select the documents you want to order by clicking the checkbox.
9. Click **Order** to order the selected documents, or **Exit** to close the dialog. Work with the ordered documents as you do normally.



## To Search by Assessor's Parcel Number (APN)

1. From the General Property Search dialog, select **Assessors Parcel Number**.

Enter as much information about the APN as you know in the dialog's fields.

2. Enter the APN.

**Note:** Enter a partial APN to retrieve all APNs that begin with those numbers. For example, enter **71-39** to retrieve APNs 71-391-24 and 71-392.

3. Enter or select the state.
4. Select a county.
5. Enter a Zip Code.

**Note:** If the city and state do not match the Zip Code, Data Tree will only search by the Zip Code.

6. Click **Search**. Data Tree searches its repository of documents, and displays the properties that match your search, and the documents available for those properties, in the lower portion of the General Property Search dialog:

APN	Owner ...	Address
71-391-24-1	RASH ...	2914 ROCKWELL

Select	Document Type	Recording Date	Seller	Buyer
<input type="checkbox"/>	REFINANCE	2002-02-12		
<input checked="" type="checkbox"/>	GRANT DEED	2000-11-20	RASH KEVIN ...	RASH K...
<input type="checkbox"/>	GRANT DEED	2000-05-11	WILDHORSE ...	RASH K...

Order Exit

7. Select the documents you want to order by clicking the checkbox.
8. Click **Order** to order the selected documents, or **Exit** to close the dialog. Work with the ordered documents as you do normally.

## Cancelling Orders

You can cancel an entire order, which will cancel all the document requests within it, at any time until the order is in Completed status.

**Caution:** You will be charged for orders that reach Print-Queued or Completed status. You must cancel orders in Requested or Requesting status to avoid being charged.

---

### To Cancel an Order

1. Click **Cancel Order** on the Order Entry dialog.
2. At the prompt, click **Yes**.

Or, if you already closed the order and the documents are still in Requested or Requesting status, select **Order | Cancel Order**. If this menu option is grayed out, you may not cancel the order.

The status of a canceled order is Complete, but the status of all of its documents is Cancelled.

## Cancelling Requests

Cancelling a request cancels one document instead of the entire order. A request must be in Requested, Requesting or PrintQueued status to be canceled.

---

### To Cancel a Request

1. Select a document in the Order Entry dialog.

**Caution:** Documents cannot be canceled after they reach Completed status.

2. Click **Cancel Request**.

Or, if you already closed the order and the documents are still in Requested or Requesting status, select **Document | Cancel Request**. If this menu option is grayed out, you may not cancel the request.

The status of that document will be Cancelled.

# Using the Order List Window

The Order List window lists all of the orders within the selected folder. See “Chapter 4: Managing Folders” on page 71 for more information on folders.

**Tip:** Right-click in the Order List window to display a short-cut menu specific to this area.

To change the way the order information is displayed, you can:

- Sort the display by clicking on the Name, Comment, Status, # of Documents, Created By, and Created bars. Click once to sort ascending (A–Z, 1–9), click again to sort descending (Z–A, 9–1).

**Note:** Unless you specify a different sort display, the orders in the Order List window are sorted by order date.

- Use the horizontal scroll bar at the bottom of the window to see more columns.
- Resize the columns by moving your mouse over the divider between the columns until you see parallel bars with arrows on either side. Click and drag the divider to expand or contract the column.
- Resize the Order List window by moving your mouse over the divider between it and the Document window until you see parallel bars with arrows on either side. Click and drag the divider to expand or contract the Order List window.


# Modifying Orders

After you have created an order, you may want to change it. Perhaps you want to request a document be added to an already-existing order.

**Tip:** You can only modify orders in the Local Orders folder. If the order is in a different folder, first move it to the Local Orders folder. See “Chapter 4: Managing Folders” on page 71 for more information.

---

## To Modify an Order

1. Select an order.
2. Click **Modify Order**  on the Order toolbar or select **Order | Modify Order**. (If this menu option is grayed out, you may not modify the order.) The Order Entry dialog appears.

Instead of a blank document list (which you see when you create a new order), the documents included in your original order appear.

3. Modify the order in any of the following ways:
  - Check the **Auto Print** box to print an order that is not yet Completed. See “Creating New Orders” on page 16 for more information.
  - Add requests to the order. See “Creating New Orders” on page 16 for more information.
  - Cancel requests that are not yet Completed. See “Cancelling Requests” on page 31 for more information.
4. Click **Close Order** when finished.

# Deleting Orders

Because the documents you download take up space on your hard drive, you may want to conserve disk space by deleting orders when you no longer need them.


Before you delete orders, consider the following:

- Should documents be saved for a certain amount of time?
- Can you delete immediately after the titles have been sent to the customer?
- Does your company have an Electronic File Management (EFM) license? If so, you can move orders to a common storage area. See “Managing Folders” on page 71 for more information.

**Caution:** Whole orders are deleted, not individual documents. Once an order is deleted, it and the documents it contained cannot be recovered. If they were deleted in error, you must recreate the order.

---

## To Delete an Order

1. Select an order.
2. Click **Delete Order**  on the Order toolbar or select **Order | Delete Order**.
3. At the prompt, click **Yes**.

---

## To Delete all Completed Orders

1. Select **Order | Delete All Orders**.
2. At the prompt, click **Yes**.

**Note:** If you have an EFM license, this only deletes the orders within the selected folder. See “Managing Folders” on page 71 for more information.

## Using Auto Purge

Your system administrator may have set up Data Tree to delete orders after they are printed, or simply to delete all orders after a certain amount of time. Contact your system administrator for more information. If you are the system administrator, see Chapter 2 of the *Administrator's Guide* for more information.

## Printing Orders

Data Tree enables you to print documents in an order by automatically printing all documents within an order or by choosing them individually.

You may want to print by individual selection if you are more likely to email an order or document than to print one. In this case, using Auto Print would generate unnecessary print jobs, tying up your printer and wasting paper.


If you don't want all of your orders to print automatically, you can specify individual orders to print automatically.

You must close the Order Entry dialog before an order or document prints, whether you are printing by individual selection or with Auto Print. If you chose the Auto Print option, your Completed orders and documents won't go to the print queue until the Order Entry dialog is closed.

**Note:** See Chapter 4 in the *Administrator's Guide* for more information.

---

### To Print an Order

1. Select an order.
2. Click **Print Order**  on the Order toolbar or select **Order | Print Order**.

3. (If your system administrator set up this feature) A Windows print dialog appears. Select your options and click **OK**.

### To Print All Orders Automatically

To automatically print all of your orders, see “Managing Orders” on page 86 for more information. Or, if you are the system administrator, see Chapter 2 in the *Administrator’s Guide* for more information.

### To Print the Current Order Automatically

1. Create a new order. See “Creating New Orders” on page 16 for more information.
2. Check the **Auto Print** box.

**DataTree - Order Entry**

Order Name: Monday 6-10      Comment: today's orders

State: AZ      County: Apache      Type: Affidavit documents      Save Default

Document Information - Range: up to 2002.3915

Year:      Docid:      Through:      Submit Request

**Printing Information:**

☒ Auto Print      Copies: 1      ☐ 11x17      Page Limit: 20      Cancel Request

☒ All Pages      ☐ Print first 1 pages      Cancel Order      Close Order

#	Status	State	County	Doc Type	Desc
1	Completed	CA	Contra Costa	Document-Year.DocID	2002
2	Completed	CA	Contra Costa	Document-Year.DocID	2002
3	Completed	CA	Contra Costa	Document-Year.DocID	2002
4	Completed	CA	Contra Costa	Document-Year.DocID	2002
5	Completed	CA	Contra Costa	Document-Year.DocID	2002
6	Completed	CA	Contra Costa	Document-Year.DocID	2002
7	Completed	CA	Contra Costa	Document-Year.DocID	2002
8	Completed	CA	Contra Costa	Document-Year.DocID	2002
9	Completed	CA	Contra Costa	Document-Year.DocID	2002

3. Select the number of copies to print.
4. (Optional) If your printer is capable of printing 11 x 17 paper and you want to print that size (i.e., parcel maps), check the **11 x 17** box.



5. (Optional) If the document contains more than one page, select a number of pages to print (**All Pages** or specify a maximum page count). See step 9 in “To Create a New Order” on page 16 for more information on printing options.
6. (Optional) Increase the number of pages that will be downloaded for each document. This will affect how many pages are available for printing. See your system administrator for more information. If you are the system administrator, see Chapter 2 of the *Administrator's Guide* for more information.

When this order is PrintQueued and the Order Entry dialog is closed, all of the documents within that order will print automatically.

## Using PCL Settings

Using Print Control Language (PCL) mode to print may help you to print faster. Your orders are made up of images, which can take longer to print than ordinary text. See your system administrator for more information. If you are the system administrator, see Chapter 2 of the *Administrator's Guide* for more information.

**Note:** Document annotations do not print if you are using PCL mode. For more information on annotations, see “Annotating Documents” on page 57.

## Printing Incomplete Orders

You may print an order that is partially filled while waiting for the remaining requests to be filled. This is particularly useful if you are requesting a large number of documents and want to print individual documents before the order is complete.

When one of the documents in an order has not yet downloaded, you can still print the completed documents in

that order. Select **Order | Print Incomplete Order**. The completed documents will now print.

**Note:** This option is only available when you have Auto Print turned on for your orders. See “To Print All Orders Automatically” on page 36 or “To Print the Current Order Automatically” on page 36 for more information.

## Saving Orders

Save your orders on a local or network hard drive to avoid the order being purged automatically. The order will still be purged from Data Tree, but you will be able to open in it any graphics viewer (such as Acrobat Reader, PhotoShop, Paint Shop Pro, or the Image viewer that comes with Windows) from its stored location.


**Note:** If you have an EFM license, use it to avoid document purges. See “Managing Folders” on page 71 for more information.

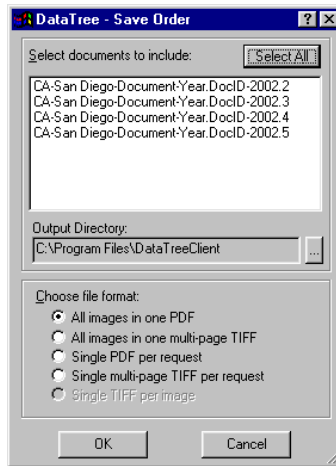
You can also archive orders in different folders on your hard drive. See “Chapter 4: Managing Folders” on page 71 for more information.

---

### To Save an Order

1. Select an order.

2. Click **Save**  on the Order toolbar or select **Order | Save**. The Save Order dialog appears:




3. Click each file you want to save.

**or** Click **Select All** to select all files listed.

**Note:** Any inserted or scanned documents attached to the order are not saved with the order.

4. Select a file format for the documents in the order:

- **All images in one PDF** combines the documents you select into a single, large, multi-page PDF file.
- **All images in one multi-page TIFF** combines the documents you select into a single, large, multi-page TIFF, or image file.
- **Single PDF per request** creates one, possibly multi-page PDF file per document.
- **Single multi-page TIFF** creates one, possibly multi-page TIFF, or image file.

- **Single TIFF per image** creates one TIFF, or image file, per image page in the document.
5. (Optional) Click  under the Output Directory to change where the file is saved.
  6. Click **OK**. The order is saved in the Output Directory.

## Emailing Orders

Data Tree enables you to email orders to selected recipients. Emailing orders can save on paper and postage costs, and can improve the speed at which you can deliver needed information to your clients.

**Tip:** Because image files can be large, verify whether your email provider or your recipient's email provider sets a size limit on incoming or outgoing messages.

Data Tree supports two methods for emailing, depending on the email application you use:

- Mail Application Interface (MAPI), which allows you to use the email tool you use every day (such as Eudora or MS Outlook).
- Simple Mail Transfer Protocol (SMTP), which uses an internal, customer mail package, if your email application does not support MAPI (for example, MS Outlook Express).


**Tip:** Data Tree includes an address book with the SMTP e-mail tool. See “Using the Address Book” on page 84 for more information.

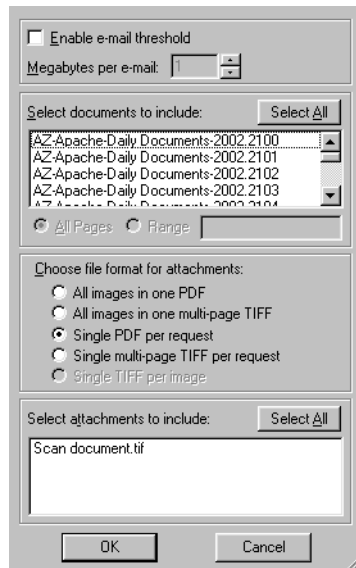
Your system administrator has set up the type of email you can use. Contact your system administrator if you have

questions. If you are the system administrator, see Chapter 2 of the *Administrator's Guide* for more information.

---

### To Email an Order Using Your Email Tool

1. Select an order from the Order List.
2. Click **Email Order**  on the Order toolbar or select **Order | Email Order**. The Attachment dialog appears:



3. (Optional) Check **Enable email threshold** to set a file size limit if you or the receiver has an email size limitation.
4. Click each document or attachment you want to send.  
**or** Click **Select All** to select all of the files listed.
5. Select a file format for attachments:
  - **All images in one PDF** combines all the documents you choose to send into a single PDF file.

- **All images in one multi-page TIFF** combines all the documents you choose to send into a single TIFF file.
  - **Single PDF per request** creates a separate PDF file for each document.
  - **Single multi-page TIFF per request** creates a separate TIFF file for each document.
6. Click **OK**. This creates a new message in your email program. Your standard email window appears with the files attached.


**Note:** Depending on the size of your attachments, it may take a little while for your email window to appear.

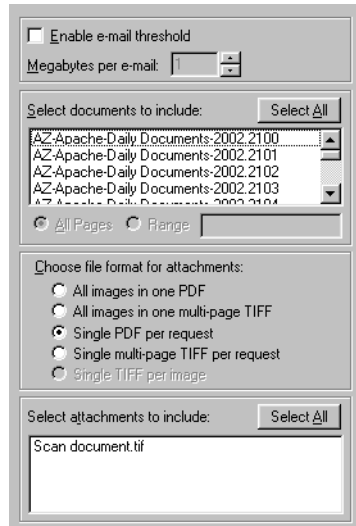
7. Enter the email address, subject matter, and message in the appropriate areas, as you would for any other email.
8. Send the email.

The order has been sent via email.

---

## To Email an Order Using Data Tree's Internal Email Tool

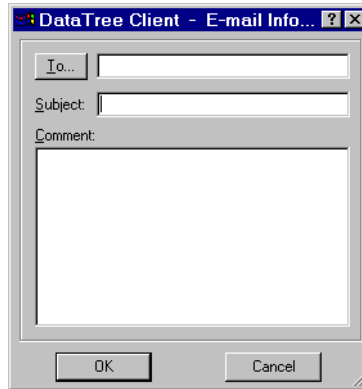
1. Select an order from the Order List.
2. Click **Email Order**  on the Order toolbar or select **Order | Email Order**. The Attachment dialog appears:



3. (Optional) Check **Enable email threshold** to set a file size limit if you or the receiver has an email size limitation.
  4. Click each document or attachment you want to send.
- or** Click **Select All** to select all of the files listed.
5. Select a file format for attachments:
    - **All images in one PDF** combines all the documents you choose to send into a single PDF file.
    - **All images in one multi-page TIFF** combines all the documents you choose to send into a single TIFF file.
    - **Single PDF per request** creates a separate PDF file for each document.

- **Single multi-page TIFF per request** creates a separate TIFF file for each document.

6. Click **OK**. This opens the Email Information dialog:



7. Type the recipient's email address.

**or** Click **To...** to select from the address book:



- Select a recipient from the list.
- Click **Add**.
- Repeat until you are finished selecting recipients.
- Click **OK**.



8. Click **OK**.

Your order has been sent via email.

## **Using the Email Address Book**

If you use the internal email tool, you may use the email address book within Data Tree to store commonly-used addresses. See “Using the Address Book” on page 84.

# **Using Cover Sheets**

Printing cover sheets with your orders and documents can help you and your customers understand the information included in an order or document. If you use a cover sheet, it is the first page printed with every order or document.

## **Using the Default Cover Sheet**

Data Tree has a default cover sheet you can print with your orders. It includes the order name, comments, date and time the order was placed, and a list of the included documents. If you would like to use the default cover sheet, see your system administrator. If you are the system administrator, see Chapter 2 of the *Administrator's Guide* for more information.

**Tip:** You can't modify the default cover sheet, but you can create a customized cover sheet to use. See “Using a Customized Cover Sheet” below for more information.

## **Using a Customized Cover Sheet**

To add to the aesthetics of your printed orders and documents or to ensure that specific data you require is included with each order, you can design a customized cover sheet to print with your orders and documents. For example, you could include your company logo or artwork.

---

### To Create a Custom Cover Page

1. Design a cover page in your favorite bitmap editor.
2. Save it as a TIFF file. It must be 8.5" x 11" (letter-size paper), CCITT Group 3 fax, monochrome 200 x 200 dpi.
3. Tell your system administrator that you want to use a customized cover page. Tell them the name of the TIFF file and where it is located on your hard drive.

If you are the system administrator, see Chapter 2 in the *Administrator's Guide* for more information.

### Printing a Test Cover Sheet

You may want to print only the cover sheet to see how useful the default or customized cover sheet is or to ensure that the correct cover sheet is specified for your desktop.

---

### To Print a Test Cover Page

1. Select an order.
2. Select **Order | Print Cover Page**. A standard Windows print dialog appears.
3. Click **OK**.

A test cover page will print.

## Using Disclaimers

Data Tree enables you to include a disclaimer on each map you print. For example, this disclaimer could indicate that the map is for assessment only, and that the title company assumes no liability for any changes to the map. Data Tree supplies a default disclaimer file. If you would like to use the default disclaimer, see your system administrator. If you are the system administrator, see Chapter 2 of the *Administrator's Guide* for more information.

## Using a Customized Disclaimer

To add to the aesthetics of your printed orders and documents or to ensure that specific data you require is included in the disclaimer, you can design a customized disclaimer to print with your maps. For example, you could include your company logo or artwork or you could change the disclaimer text.

---

### To Create a Custom Disclaimer

1. Design a disclaimer in your favorite bitmap editor.
2. Save it as a TIFF file. It must be 8.5" x 11" (letter-size), CCITT Group 3 fax, monochrome 200 x 200 dpi.
3. Tell your system administrator that you want to use a customized disclaimer. Tell them the name of the TIFF file and where it is located on your hard drive.

If you are the system administrator, see Chapter 2 of the *Administrator's Guide* for more information.

# Adding Documents to an Order


Data Tree enables you to add existing documents not received from Data Tree to orders you have in the system. You can add hard copy documents by scanning them and placing them in the order or you can insert a file into the order. This way, you can add your company's own documents to your Data Tree order.

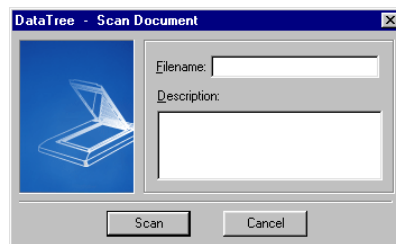
## Scanning Documents

You can add hard copy documents to you Data Tree orders by using a scanner to copy the image of the document.

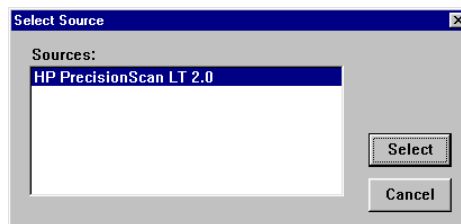
---

### To Scan a Document

1. Click **Scan Document**  on the Order toolbar or select **Order | Scan Document**. The Scan Document dialog appears:



2. Enter a name for the new document.
3. Enter a description of the document.
4. Click **Scan**. This opens the Select Source dialog:



Your scanner software should appear in the list. If it does not, contact your System Administrator.

5. Select the scanner source and click **Scan**. This opens your scanner software.
6. Proceed with scanning the document according to your scanner software.

When the scan is complete, the new document appears in the Data Tree Main window, in a new document list.


## Inserting Documents

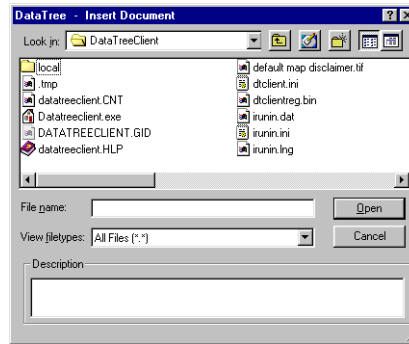
You can add other electronic documents to your Data Tree orders by simply inserting them into the order. This way, your existing document files on your hard drive or network are added to your existing Data Tree orders.

**Note:** An inserted document can be in any file format, but you won't be able to view it in the Data Tree window. To view an inserted document, double-click the document name and Windows opens it in its default program. For example, if you insert a Word .doc file, double-clicking the file name opens the document in Word.

---

## To Insert a Document

1. Click **Insert Document**  on the Order toolbar or select **Order | Insert Document**. The Insert Document dialog appears:



2. If it's not already selected, select the location of the document.
- or** Type the file name.
3. (Optional) Enter a Description for the document.
4. Click **Open**. The new document appears in the Data Tree Main window, in a new document list.

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## **Chapter 3:**

# **Managing and Viewing Documents**

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Once you have placed an order and closed the Order Entry dialog, you can view and work with documents.

# Viewing Documents

Click on a Completed document to see it in the Document Image window. Double-click to see it in a new window (the Document View window), which you can resize as needed. The Document View window contains all the tools available in the Document menu and toolbar, but presents the document in an independent window. Since you can open more than one Document View window, you can use this feature to look at more than one document at the same time.

## Using the Document List Window

The Document List window lists all of the documents within a selected order.

**Tip:** Right-click in the Document List window to display a shortcut menu specific to this area.

To change the way the document information is displayed, you can:

- Sort the display by clicking on #, State, County, Doc Type, Description, and Page Count bars. Click once to sort ascending (A–Z, 1–9), click again to sort descending (Z–A, 9–1).

**Note:** The Document List window automatically sorts documents according to the order in which the document was requested.





- Use the horizontal scroll bar at the bottom of the window to see more columns.
- Resize the columns by moving your mouse over the divider between the columns until you see parallel bars with arrows on either side. Click and drag this divider to expand or contract the column.



- Resize the Document List window by moving your mouse over the divider between it and the Document window until you see parallel bars with arrows on either side. Click and drag this divider to expand or contract the Document List window.



## Using Document View Tools



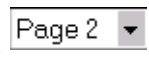
Document view tools allow you to change the way a document is positioned in the Document Image window. The Document View tools are:

- **View Document**  shows the selected document in a Document View window.
- **Fit to Window**  fits the document image so the entire image is shown in the Document Image window.
- **Fit to Width**  fits the document image to the width of the window.
- **Fit to Height**  fits the document image to the height of the window.

## Using Page Number Tools



Page number tools allow you to select which page number within a multi-page document you want to see. These tools are inactive if the document contains only a single page. The page number tools are:

- **First Page**  displays the first page of the selected document. This tool is inactive if you are looking at the first page of the document.
- **Previous Page**  displays the previous page of the selected document. This tool is inactive if you are looking at the first page of the document.

- **Next Page**  displays the next page of the selected document. This tool is inactive if you are looking at the last page of the document.
- **Last Page**  displays the last page of the selected document. This tool is inactive if you are looking at the last page of the document.
- **Page Number Dropbox**  allows you to select which page of the document you want to view.



If you double-click a document and are viewing it in the Document View Window, you have two additional tools available. These tools enable you to view the previously and next requested documents in the order. These tools are only available in the Document View Window.


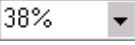





The requested document view tools are:

- **Previous Request**  displays the previous requested document in the order.
- **Next Request**  displays the next requested document in the order.

## Using Image View Tools

Image view tools allow you to view each document page in different ways. The image view tools are:

- **Zoom In**  enlarges the entire document image by 5%.
- **Zoom Out**  decreases the size of the entire document image by 5%.

- **Zoom**  turns your cursor into a cross-hatch, which you can click and drag to define the specific area you want to enlarge.
- **Document View Size**  allows you to select a specific view size percentage.
- **Rotate Right**  rotates the document image clockwise.
- **Rotate Left**  rotates the document image counter-clockwise.
- **Pan**  turns your cursor into a hand, which you can then use to click and move the document image up and down, sideways, or diagonally. This changes the portion of the document shown in the Image window.
- **Magnify**  turns your cursor into a magnifying glass that you can then use to click on an area to magnify it for as long as you hold down the mouse button. You can also hold the mouse button down and drag the magnify cursor over any part of the document. Anything under the cursor is magnified.
- **Select**  turns your cursor into a cross-hatch, which you can then use to select an area. See “Selecting Part of an Image” below for more information.

## Selecting Part of an Image

Data Tree includes a Select tool for when you want to use only part of a document.

### To Select an Area

1. Click **Select**  on the Document toolbar or select **Image | Select**.

When you move it over the Document Image window, your cursor turns into a crosshatch.

2. Click and drag over the area you want to select. A box will form surrounding the area where you dragged your cursor. This is the selected area.

Once you've selected an area, you can save, copy, or print that selection.

---

### **To Save a Selected Area**

This is useful when you want to save only part of a document, or email the selection.

1. Select **Image | Save Selection**. The standard Windows save dialog appears.
2. Choose a location for the selection.
3. Type a name for the selection. It is saved as a TIFF file.
4. Click **OK**.

---

### **To Copy a Selection**

1. Select **Image | Copy Selection**. The selection is copied to the Windows clipboard.
2. Paste the selection into another application.

---







### **To Print a Selection**


1. Select **Image | Print Selection**. The standard Windows print dialog appears.
2. Select your preferences.
3. (If your system administrator set up this feature) The standard Windows print dialog appears. Select your options and click **OK**.

**Note:** If your defaults include printing a cover page or disclaimer, that will also print with your selection. See “Using Cover Sheets” on page 45 or “Using Disclaimers” on page 46 for more information.



## Annotating Documents

Annotation tools allow you to create notes and other mark-ups on your documents in the Data Tree window. This enables you to share comments and information with other users of the system. You can draw attention to something in a document. The annotation tools are:

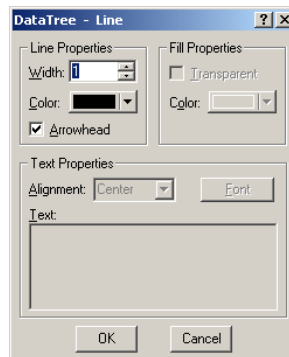
- **Annotations ON/OFF**  displays or hides annotations on a document.
- **Select Annotation**  enables you to use your cursor to select an annotation on a document.
- **Line/Arrow**  turns your cursor into a drawing tool that creates lines and arrows.
- **Highlighter**  turns your cursor into a highlighting pen, which you can use to highlight selected areas of a document.
- **Sticky Note**  turns your cursor into a cross-hatch, which you can use to create a visual “post-it” on a document.
- **Annotation Properties**  displays font and color options for the annotation.
- **Send to Front** places the annotation on top of the document or other objects.

- **Send to Back** places the annotation behind the document or other objects.
- **Delete**  removes the annotation from the document.

## To Draw Lines and Arrows on a Document

1. Click Line/Arrow  or select **Annotations | Line/Arrow**. Your cursor changes to cross-hairs when you scroll over the document.
2. Click on the starting point for the line or arrow and drag to the ending point. A line appears on the document.
3. (Optional) Click Properties  or select **Annotations | Properties** to change the width or color of the line. You can also use Properties to change a line to an arrow or change an arrow to a line.

The Annotation Properties for Line/Arrow dialog appears:





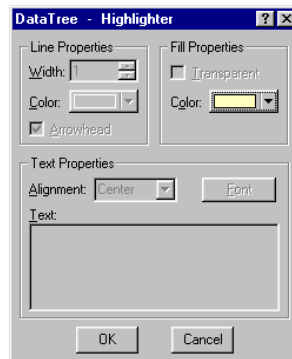
- a. Change the Width of the line or arrow by typing the width or clicking the arrows to increase or decrease the width.
- b. Click Color to select a different color for the line or arrow.

- c. Check Arrowhead to make the line an arrow.
- d. Click **OK**.

---

### To Highlight a Document


1. Click **Highlighter**  or select **Annotations | Highlighter**. Your cursor changes to cross-hairs when you scroll over the document.
2. Click on the starting point for the highlighter marking and drag to the ending point. The highlight appears on the document.
3. (Optional) Click **Properties**  or select **Annotations | Properties** to change the color of the highlight. The Annotation Properties for Highlighter dialog appears.



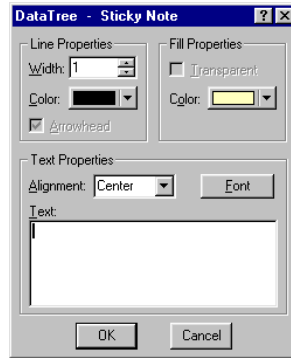
- a. Click Color.
- b. Select a color. The highlight changes to the color you selected.
- c. Click **OK**.

---

### To Place a Note on a Document

1. Click **Sticky Note**  or select **Annotations | Sticky Note**. Your cursor changes to cross-hairs when you scroll over the document.

2. Click on the starting corner point for the note and drag to the opposite corner. The Annotation Properties for Sticky Note dialog appears:



3. (Optional) Change the **Line Properties** of the border surrounding the note.
4. (Optional) Change the **Fill Color** of the background of the note.
5. Type your note Text in **Text Properties**.
6. (Optional) Change the other Text Properties for alignment or font.
7. Click **OK**. The Sticky Note appears with your text on the document.

## Using Thumbnails

Thumbnails are small icons of each page in a document. Each thumbnail is a miniaturized image of each document page. This makes it easy to navigate through a document because you may recognize which page has the information you need.



## Viewing Thumbnails

You can change the size of your thumbnails depending on your preferences. For large documents, you may want small thumbnails so you can see all the thumbnails in the document. Or you may prefer larger thumbnails so you can see the page images better.

**Tip:** Right-click in the Thumbnail area to display a shortcut menu specific to this area. Do not right-click directly on a thumbnail. See “To Print Several Non-Continuous Pages” on page 64 for more information.

---

### To Increase Thumbnail Size

1. Select a document from the document list in the Main Window.
2. Select **Image | Increase Thumbnail Size**.
3. Repeat as necessary to get the size you want.

**Note:** These options are not available in the Document View window.

---

### To Decrease Thumbnail Size

1. Select a document from the document list.
2. Select **Image | Decrease Thumbnail Size**.
3. Repeat as necessary to get the size you want.

---

### To View a Document Using Thumbnails


1. Select a document from the document list.
  2. Click a thumbnail image to view that page in the Document Image window.
- or** Double-click a thumbnail image to open the page in a new Document View window. See “Viewing Documents” on page 52 for more information on using this window.

# Printing Documents and Pages

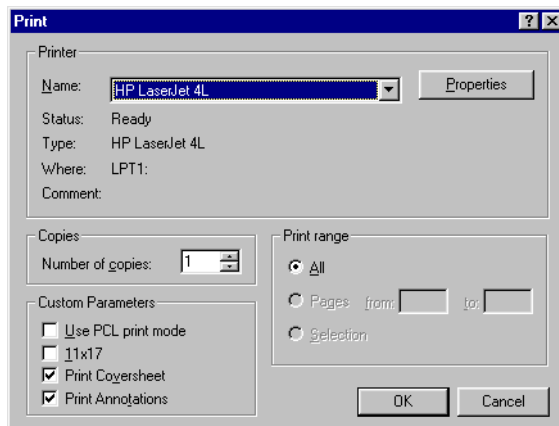
Print a document when you don't want to print an entire order or when you only need the information on a few pages within the document. You can also re-print documents without having to re-order it. Be sure to save the document or order if you plan on going back to print at a later time. See “Saving Documents” on page 64 and “Saving Orders” on page 38 for more information.

---

## To Print a Document

1. Select a document from the document list.
2. Click **Print Document**  on the Document toolbar or select **Document | Print Document**.

(If your system administrator set up this feature) The standard Windows print dialog appears.



3. Select your options.

**Note:** If your defaults include using in PCL mode, using 11 x 17 paper, printing cover pages, or annotations, the option(s) are checked in *Custom Parameters* to print with your document. If your defaults are not set to print these

items, you can select them here for printing. For more information, see “Setting Printer Options” on page 78 or “Creating New Orders” on page 16.

4. Click **OK**.

---

### **To Print the Current Page of a Document**

1. Select **Image | Print Page**.
2. (If your system administrator set up this feature) The standard Windows print dialog appears, set to print only the selected page. Select your options and click **OK**.

**Note:** If your defaults include printing a cover page or disclaimer, that will also print with your page. See “Using Cover Sheets” on page 45 or “Using Disclaimers” on page 46 for more information.

---

### **To Print Multiple Pages**

1. Create a new order.
2. In Printing Information on the Order Entry dialog, check **Auto Print**.
3. Select **Print first x pages**.
4. Click the up or down arrows to increase or decrease the number of pages, or enter the total number of pages you want to print. For example, if you want to print pages 1 through 10, enter 10.
5. Continue entering information as required for the order.
6. Click **Submit Request**. The specified pages will automatically print to your default printer.

**Note:** You can only print the first multiple pages to print when you are using auto print during the order download

---

### To Print Several Non-Continuous Pages

1. Right-click on a document thumbnail at the bottom of the Data Tree window.

A red border appears around the thumbnail. It is now a tagged image. Right-click all the document thumbnails that you want to print.

To clear the tag, right-click on the thumbnail again. The red border disappears.

2. Select **Image | Print Tagged Images**.

The tagged images will print in sequential order.

**Note:** If your defaults include printing a cover page or disclaimer, that will also print with your selection. See “Using Cover Sheets” on page 45 or “Using Disclaimers” on page 46 for more information.


## Saving Documents

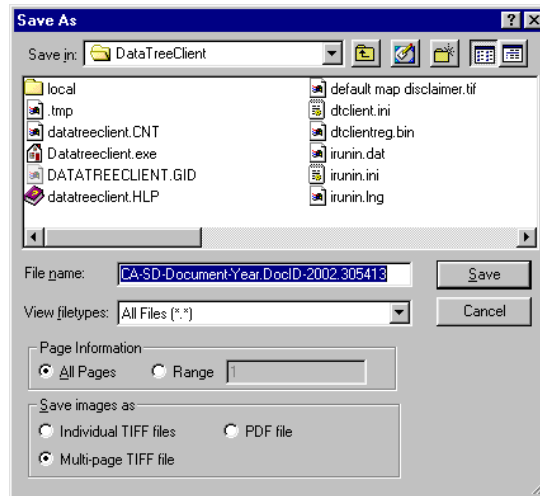
Save your documents on a local or network hard drive to avoid a document being purged automatically. The document will still be purged from Data Tree, but you will be able to open it in any graphics viewer (such as PhotoShop, Paint Shop Pro, or the Image viewer that comes with Windows) from its stored location.

---

### To Save a Document

1. Select a document.

2. Click **Save**  on the Document toolbar or select **Document | Save**. This opens the Save As dialog:



3. Choose a location for the document.
4. (Optional) Type a name for the document. Data Tree automatically uses the document name for the file name; skip this step to keep the default name.
5. Choose a storage format:
  - **Multiple TIFF files** creates one TIFF, or image file, per image page in the document. Each will have the name you specified in step 4, with the page number added to the end of the file name.
  - **Multi-page TIFF file** combines the document pages you selected into a single, large, multi-page TIFF, or image file.
  - **PDF file** combines the document pages into a single, large, multi-page PDF file.
6. Click **OK**.

# Emailing Documents

Data Tree enables you to email individual documents to recipients. Emailing documents can save on paper and postage costs, and can improve the speed at which you can deliver needed information to your clients.

**Tip:** Because image files can be large, verify whether your email provider or your recipient's email provider sets a size limit on incoming or outgoing messages.

Data Tree supports two methods for emailing, depending on the email application you use:

- Mail Application Interface (MAPI), which allows you to use the email tool you use every day (such as Eudora or MS Outlook).
- Simple Mail Transfer Protocol (SMTP), which uses an internal, customer mail package, if your email application does not support MAPI (for example, MS Outlook Express).

**Tip:** Data Tree includes an address book with this email tool. See “Using the Address Book” on page 84 for more information.

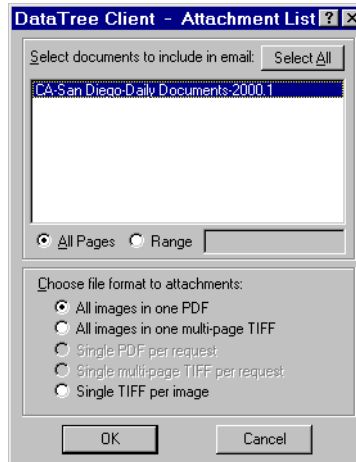
Your system administrator has set up the type of email you can use. Contact your system administrator if you have questions. If you are the system administrator, see Chapter 2 of the *Administrator's Guide* for more information.

---

## To Email a Document Using Your Email Tool

1. Select a document from the Document List.

2. Click **Email Document**  on the Document toolbar or select **Document | Email Document**. The Attachment dialog appears



3. Click each file you want to send.
- or Click **Select All** to select all of the files listed.
4. Select a file format for attachments:
  - **All images in one PDF** combines the documents you select into a single, large, multi-page PDF file.
  - **All images in one multi-page TIFF** combines the documents you select into a single, large, multi-page TIFF, or image file.
  - **Single TIFF per image creates one TIFF**, or image file, per image page in the document.
5. Click **OK**. This creates a new message in your email program. Your standard email window appears with the files attached.


**Note:** Depending on the size of your attachments, it may take a little while for your email window to appear.

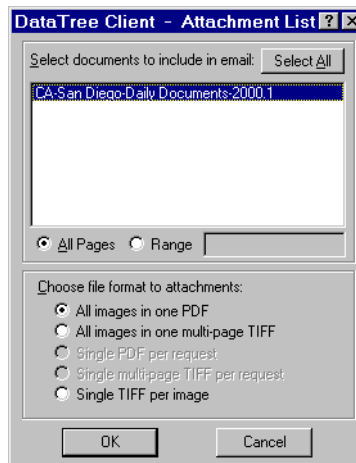
6. Enter the email address, subject matter, and message in the appropriate areas, as you would for any other email.
7. Send the email.

Your document has been sent via email.

---

### To Email a Document Using Data Tree's Internal Email Tool

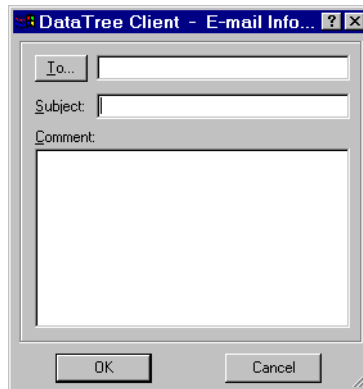
1. Select a document from the Document List.
2. Click **Email Document**  on the Document toolbar or select **Document | Email Document**. The Attachment dialog appears:



3. Click each file you want to send.
- or** Click **Select All** to select all of the files listed.



4. Select a file format for attachments:
  - **All images in one PDF** creates one PDF file out of all the documents you choose to send.
  - **All images in one multi-page TIFF** creates one TIFF, or image file, out of the documents you choose to send.
  - **Single TIFF per image** creates one TIFF, or image file, per image page in the document.
5. Click **OK**. This opens the Email Information dialog:



6. Type the recipient's email address.

or Click **To...** to select from the address book:



- a. Select a recipient from the list.
- b. Click **Add**.
- c. Repeat until you are finished selecting recipients.
- d. Click **OK**.

7. Click **OK**.

Your document has been sent via email.

## Using the Email Address Book

If you use the internal email tool, you may use the email address book within Data Tree to store commonly used addresses. See “Using the Address Book” on page 84.

*In this chapter:*

- *Creating a New Folder* ..... 72
- *Viewing Folder Contents* ..... 73
- *Moving Orders to Folders* ..... 73
- *Searching for Orders in Folders*..... 74
- *Removing Data Tree Folders* ..... 76

## Chapter 4: Managing Folders

---

Data Tree allows you to set up folders so you can view and manage orders and documents. This supports a more efficient workflow by allowing you to share orders and documents across a Local Area Network (LAN).

**Note:** Folder management options are available only if you have an EFM license. See your system administrator for more information. If you are the system administrator, see Chapter 1 in the *Administrator's Guide* for more information.

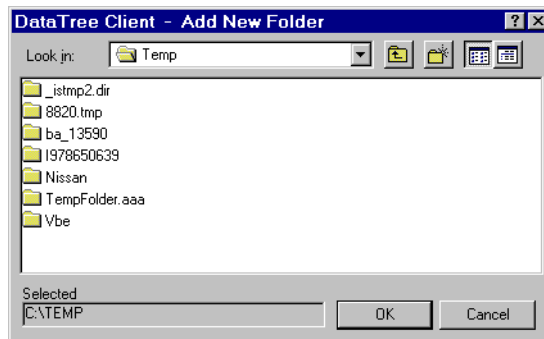
# Creating a New Folder

Create a new folder to store your orders and documents where they can be shared (if you use a network drive) and where they won't be Auto Purged. When you create a new folder in Data Tree, it creates a folder on the local hard drive or network directory.

---


## To Create a New Folder

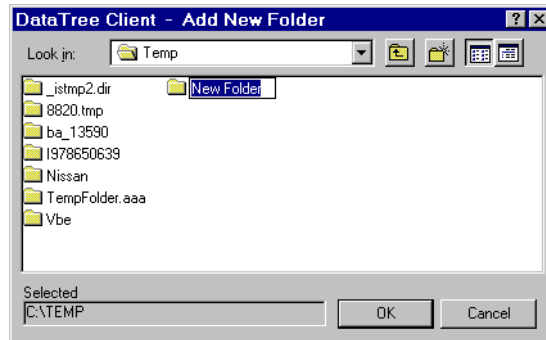
1. Select **Data Tree | Data Tree Folders | New Folder**. The standard Windows Add New Folder dialog appears:



2. Navigate through the directory to specify the location for the new folder.

**Note:** If you are moving orders because you want to have more space on your local hard drive, select a different drive for the new folder.

3. Click **New Folder** . A new folder appears in the Add New Folder dialog:



4. Type a name for the new folder.
5. Double-click the folder to select it.
6. Click **OK**. The folder is added to both your hard drive and the Data Tree folder list.

## Viewing Folder Contents

To see the orders within a folder, click the folder icon. Its contents appear in the Order List window.

**Tip:** Right-click in the folder list area to display a shortcut menu specific to this area.

## Moving Orders to Folders

Use folders to share documents within a work team or save them to a network for archiving. Using folders can save space on the local workstation hard disk drive. In addition, moving an order to a folder protects it from being automatically purged.

**Note:** After you move an order out of Local Orders, it will not be automatically purged even if you move it back.

---

### To Move an Order to a Folder

1. Select an order.
2. Hold down the mouse button and drag the cursor over the folder icon. The cursor changes to a page icon.
3. When the page icon cursor is over the folder, release the mouse button.

**Note:** Orders can only be modified while in the Local Orders folder. If you've moved an order into another Data Tree folder, you must move it back to Local Orders before modifying it.

## Searching for Orders in Folders

You can search for a specific order, without knowing which folder it is in. This way, you find an order even if you don't know exactly where it is. You can look for orders based on the order name, description, document number, or any combination of those parameters.

---

### To Search for an Order

1. Right-click in the Folder List. A context menu appears.

2. Select **Search Folders**. The Search for Order dialog appears:



3. Select a *Search By* parameter:
  - Order Name
  - Comment
  - Document
4. Enter the Order Name, Comment, or Document you are searching for.
5. Click **Search**. DataTree searches for the requested orders and displays all matching orders in the list.
6. (Optional) Highlight an order in the list and click **Open Selected Order** to view the order in the Data Tree window.
7. Click **Close**.

# Removing Data Tree Folders

Data Tree allows you to remove folders you no longer use from the folder list.

**Note:** Removing a folder from the folder list does not delete it or its contents from the hard drive. Use the Windows file management tools to delete the folder and its contents from the hard drive.

---

## To Remove a Folder from the Folder List

1. Select the folder to remove.
2. Select **Data Tree | Data Tree Folders | Remove Folder**.
3. Click **Yes**.

The folder has been removed.



*In this chapter:*

- *Defining Application Settings* ..... 78
- *Setting Printer Options*..... 78
- *Including a Cover Page*..... 81
- *Configuring Maps* ..... 83
- *Configuring Communication*..... 84
- *Defining Email Settings*..... 84
- *Managing Orders* ..... 86
- *Setting Request Options*..... 88
- *Setting Up Title Plant Integration Options*..... 89

## Chapter 5: Configuring Data Tree for the Desktop

---

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

**Caution:** These features are available to all users, regardless of login type. Only make changes to the settings described here since other settings define communication with Data Tree and other vital system settings. You could lose important data. To make changes to any other settings contact your system administrator or Data Tree Technical Support.

# Defining Application Settings

Change the options on this tab only at the direct instruction of your system administrator or Data Tree Technical Support. See Chapter 2 in the *Administrator's Guide* for more information.

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

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

## Setting Printer Options

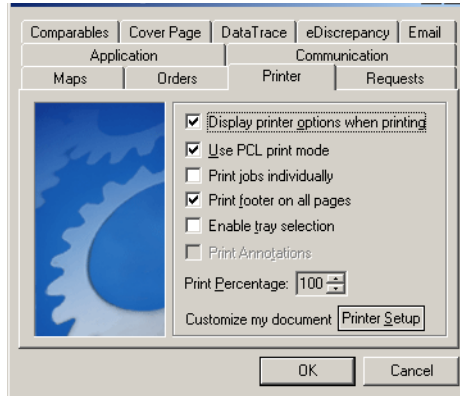
Data Tree enables you to customize various aspects of printing.

---

### 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 the Windows print dialog each time you print. This enables you to 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 81 of the *Administrator’s Guide* for more information. Clear this box to send unformatted printer data.
- **Print jobs individually** sets up Data Tree to print each document in the order separately. This sends 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 the 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 81 for more information.
  - **Print Annotations** sets up Data Tree to print any lines, arrows, highlights, or sticky notes created on a document. These items will print as they appear on the document. Clear this box to print documents without any annotations.
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. For more information on printer settings, see your Windows or printer documentation.

If you are using PCL Mode, additional settings are available. See “Setting PCL Print Mode” on page 81 of the *Administrator's Guide* 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

Change the print mode only at the direct instruction of your system administrator or Data Tree Technical Support. See Chapter 2 in the *Administrator's Guide* for more information.

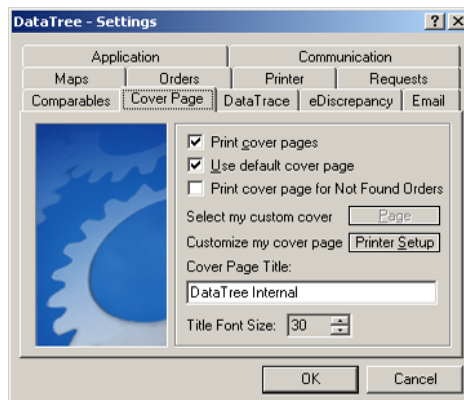
## Including a Cover Page

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. See “Using Cover Sheets” on page 45 for more information.

---

### 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 if you do not want to print 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 the next step).
5. (Optional) Click **Page** to specify a TIF file for the cover page.

**Note:** You must create a cover page before you can use this option. See “Using Cover Sheets” on page 45 for more information.

6. (Optional) Check **Print Cover Page for Not Found Orders** to print a cover page for all orders whether they were found or not.
7. (Optional) Click **Printer Setup** to specify a printer or additional printer settings.

If you are set up to use PCL print mode, you can specify the tray containing the paper you want to use for the cover page. See your system administrator for more information. If you are the system administrator, see Chapter 2 of the *Administrator's Guide* for more information.
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.

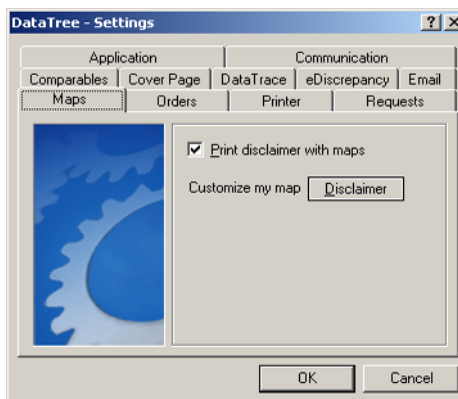
# Configuring Maps

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

Change the options on this tab only at the direct instruction of your system administrator or Data Tree Technical Support. See Chapter 2 in the *Administrator's Guide* for more information.

## Defining Email Settings

Change the options on this tab only at the direct instruction of your system administrator or Data Tree Technical Support. See Chapter 2 in the *Administrator's Guide* for more information.

### Using the Address Book

If you are using Data Tree internal email interface, you can create and store email addresses to make it easier to send documents.

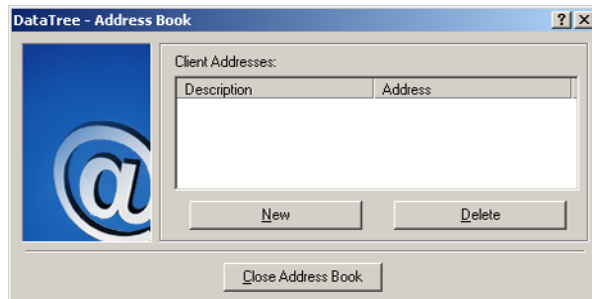
---

#### To Add an E-mail Address

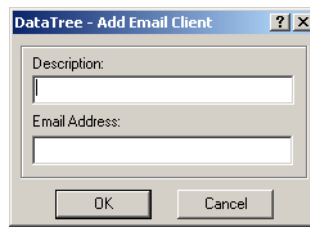
1. Select **DataTree | Client Settings**, if it is not already open.
2. Choose the **Email** tab.



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.

---

### To Delete an E-mail Address

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 permanently 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.

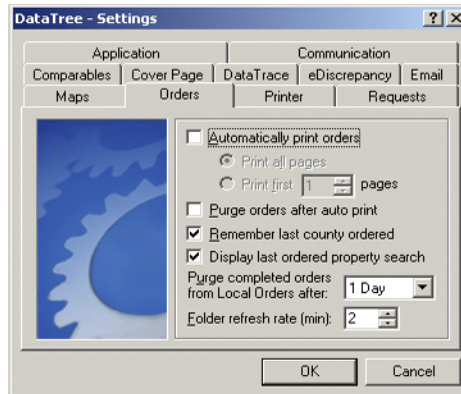
## Managing Orders

Change the options on this tab only at the direct instruction of your system administrator or Data Tree Technical Support. See Chapter 2 in the *Administrator's Guide* for more information. However, you can use this tab to specify your orders to print automatically.

---

## To Automatically Print Orders

1. Select **DataTree | Client Settings**, if it is not already open.
2. Choose the **Orders** tab:



3. 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 “number” 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.

**Caution:** The rest of the information on this tab should only be modified at the instruction of your system administrator or Data Tree Technical Support. See Chapter 2 in the *Administrator's Guide* for more information.

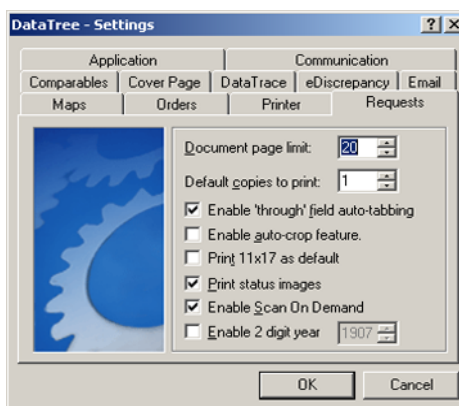
5. Click **OK** to save your changes and return to the main Data Tree window. test

# 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.

4. Set the number of copies of each document the request will include by default when auto printing. See your system administrator for more information. If you are the system administrator, see Chapter 2 of the *Administrator's Guide* for more information.

You or other users can always request additional copies when you define the order.

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 is equipped to do so.
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. 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.

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

## Setting Up Title Plant Integration Options

Change the options on this tab only at the direct instruction of your system administrator or Data Tree Technical Support. See Chapter 2 in the *Administrator's Guide* for more information.



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