



# **Data Corrections Interface (DCI) User Guide**

Data Corrections Interface (DCI) User Guide  
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## Introduction to the DCI

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The Data Corrections Interface (DCI) is a Windows-based application that allows the data centers to index official records into ATIDS quickly and efficiently. With the DCI, much of the data entry process is automated by using unique templates based on the TOI and the description depending on the document type. By using OCR (Optical Character Recognition) technology, the appropriate data is extracted from the document image and copied into the fields in the TOI template. The document image is displayed beside the data entry template so the data entry operator can easily compare the data for accuracy and, if necessary, change or enter information.

### Features

The DCI has the following features:

- Click Once technology that initiates automatic updates at the time of starting the application.
- Unique TOI templates based on selected TOI and description.
- Ability for employees with an administrative security profile to access the Document List in order to monitor the work status, select a specific document to work, and/or delete document(s).
- Access to The Fund's Internet Web browser that allows direct access to the county repository for image comparison and data entry.
- Data Entry and Image Viewer together in one application.
- A Notification section that alerts the operator of data entry errors, such as missing or invalid information in the TOI data fields.
- Use of OCR technology that connects you directly to the data in the document image and allows for quick verification/correction rather than pure data entry.
- Striping function that allows you to copy, paste, or append text directly from the image to the data field in the DCI.
- Individual screen customization that is saved by user profile.
- Focus of data fields are automatically highlighted as you tab through the Data Entry panel.
- Ability to print the current view of the DCI.
- Ability to print the contents of the entire document image or print a range of pages.
- Indication when specific fields are required.

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### Questions or Problems

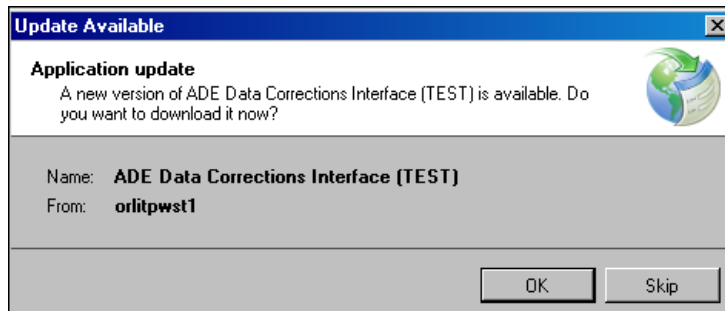
If you have any questions or problems regarding the DCI application, call the Help Desk, 1-800-929-0529, Monday - Friday, 8:00 a.m. to 6:30 p.m.



## Starting the DCI

### Internal Users

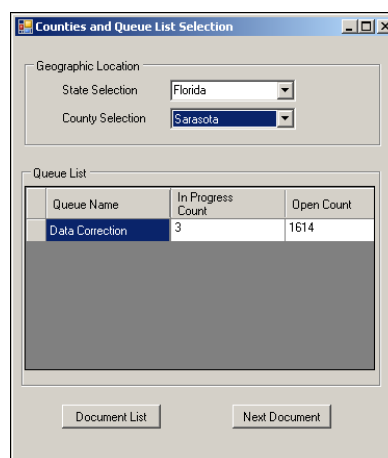
1.  Double-click the **ADE Data Corrections Interface** icon on the Windows desktop. The Counties and Queue List Selection dialog box is displayed.
2. If there is a new version deployed prior to starting the DCI, a message is displayed asking if you want to download it now. Click the **OK** button. The download may take several minutes.



**Note:** If you click the **Skip** button, you will not receive any of the latest functions for the new version.

3. Tab to the County Selection list box, and do one of the following:
  - Begin entering the name of county until the county name you want displays, and then press **Enter**.
  - Enter name of the county, press the **UP or DOWN ARROW** key to go to the specific county in the list, and then press **Enter**.

The next queues available for data entry are listed in the Queue List.




4. Do one of the following:
  - To display the Data Entry and Image Viewer panel of the next document to work in the selected queue, tab to the **Next Document** button, and then press **Enter**.
  - If you have an administrative security profile and want to view available documents in the queue(s), select or delete a document, tab to the **Document List** button, and then press **Enter**.

*Note:* The **Document List** button is only displayed if you have logged on using an administrative security profile. For more information, see [Using the Document List](#) later in this user guide.

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## External Users

1.  Double-click the **ADE Data Corrections Interface** icon on the Windows desktop. The Login to the DCI window is displayed.



2. Tab to the User Name field and enter your five character network user ID.
3. Tab to the Password field and enter your password.
4. Tab to the **Login** button, and then press **Enter**.
5. Continue from step 2 of the Internal Users section above.

## Basic DCI Features

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This section gives an overview of the DCI Window, menu bar options and other important features. It also discusses how to customize the layout of the DCI window.

### Counties and Queue List Selection

The Counties and Queue List Selection displays as a dialog box when you first start the DCI. From here, you select the geographic location, the queue you want to work in, and then go directly to the initial DCI window where you can begin verifying, correcting and/or entering data for the next available document in the selected queue. If you have the administrative security level, you can also access a Document List where you can view, select and/or delete document(s) in the list. For more information, see [Using the Document List](#) section later in this user guide. The same options on the Counties and Queue List Selection dialog box are also available from the Queue Manager. For more information, also see [Queue Manager](#) later in this section.

### Layout of the DCI Window

The DCI window contains four panes: Navigation, Workspace, Browser, and Notification. On the Navigation pane there are two panels for which you can alternate viewing: Data Entry and Queue Manager. On the Workspace pane there are also two panels: the Image Viewer, or if you have an administrative security profile, the Document List. The Browser pane allows you to access The Fund's Internet and the Web directly from the DCI. The Notification pane lists all of the outstanding error conditions related to the documents you are trying to post.

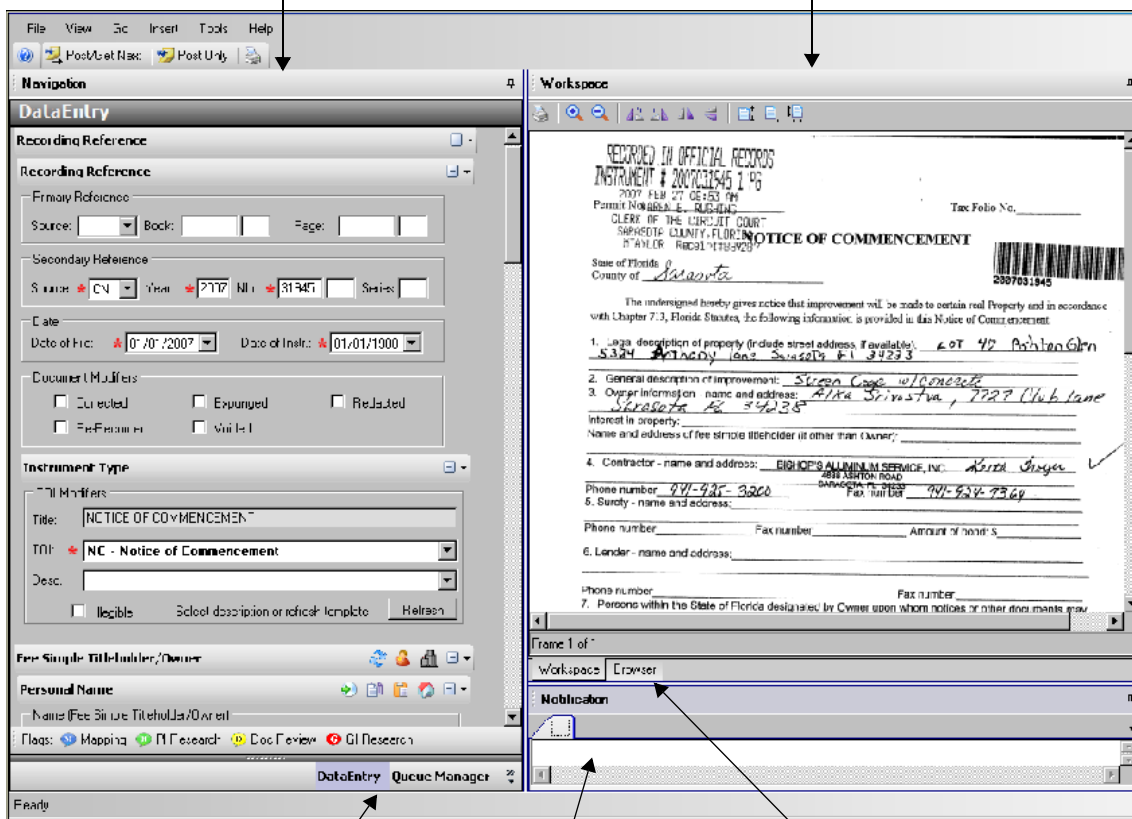
**Note:** The Document List panel is only available to users with an administrative security profile. For more information, see [Using the Document List](#) later in this user guide.

## The Initial DCI Window

This window is displayed when you select the **Next Document** button on the Counties and Queue List Selection dialog box, or on the Queue Manager panel. It has three active panes: Navigation, Workspace and Notification. As the default, the Data Entry panel is displayed as the primary panel in the Navigation pane and the Image Viewer pane is displayed as the default panel in the Workspace pane. For more detailed information, see [Navigation Pane](#) and [Workspace Pane](#) later in this section. From here, you can begin verifying, correcting and/or entering document information.

The Navigation pane displays the Data Entry panel where you verify, correct and/or enter the document information.

The Workspace pane displays the current document image from the Image Viewer.



Press CTRL+1 to switch from the Queue Manager to the Data Entry panel and press CTRL+2 to switch from the Data Entry panel to Queue Manager.

The Notification pane displays incorrect or missing required data in the Data Entry panel.

Click here to switch from the Workspace to the Browser pane.

## Navigation Pane

The Navigation pane has two panels: Data Entry and Queue Manager. As the default, the Navigation pane displays on the left. To switch from the Data Entry panel to the Queue Manager, press **CTRL+2**, and to switch from the Queue Manager to the Data Entry panel, press **CTRL+1**.

**Note:** The Image Viewer will always display when you switch to the Data Entry panel.

See [The Initial DCI Window](#) on the previous page.

### Data Entry Panel

The Data Entry panel displays a unique TOI template based on the type of document and/or description selected. If data is pre-filled in the template by the OCR engine, the operator will verify the information and, if necessary, correct or enter any missing information. For some documents, the OCR engine may not be able to determine the TOI. In this case, a TOI template is not loaded and you must select the appropriate TOI to generate the correct template. Because different types of information may be required depending on the TOI, the data fields are arranged in containers that are sorted in container groups. For more detailed information, see the [Working in the Data Entry Panel](#) section later in this user guide. For an example of the Data Entry panel, see [The Initial DCI Window](#) on the previous page.

Verify pre-filled data extracted from the OCR engine and correct missing or incorrect data.

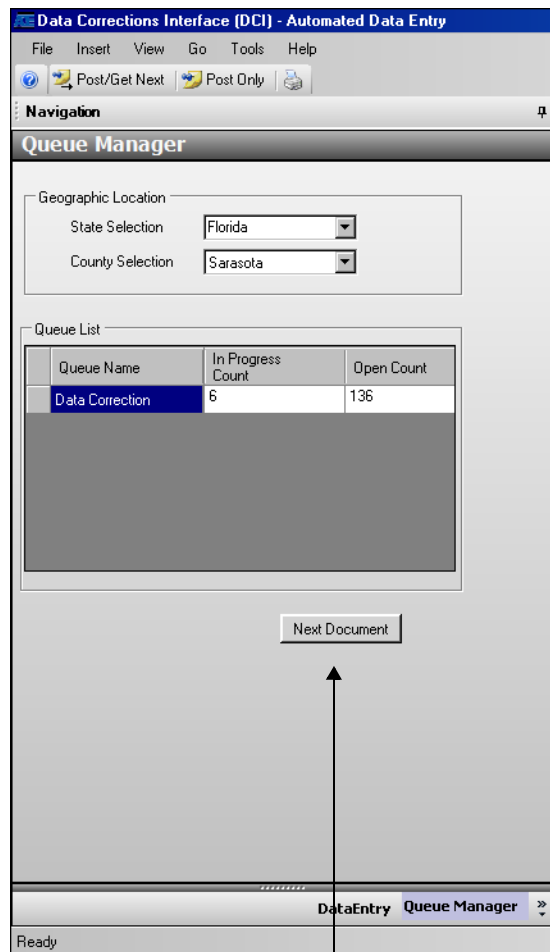
Select a flag when applicable to a document in view. For example, select the Doc Review flag to have the document manually reviewed. For more information, see [Flags](#) in the [Posting Documents with Errors](#) section.

See [Appendix C: Shortcut Keys](#) for a list of Data Entry Panel Navigation Commands to scroll through the container groups.

## Queue Manager

From the Queue Manager panel, you can change the county and tab through to the **Next Document** button to open the next document in the queue. If you have an administrative security profile, the **Document List** button is enabled to access the Document List. For information about the Document List, see [Using the Document List](#) later in this user guide.

The Queue List displays the queue name, the total number of documents in process, and the total number of documents currently available to work in this queue.



Tab here, and then press Enter to go to the next document in the queue.

## Workspace Pane

The default setting for the Workspace pane is to the right of the window and contains one or two panels depending on your security profile: Image Viewer and Document List. Most users will only access the Image Viewer. If you have an administrative security profile, you will also have access to the Document List. For more information about the Document List, see [Using the Document List](#) later in this user guide. You can switch between the Workspace and Browser panes by clicking on the appropriate title bar on the bottom of the pane.

### Image Viewer

The Image Viewer displays the current document image. For more information, see [Working with Documents in the Image Viewer](#) section later in this user guide. For an example of the Image Viewer, see [The Initial DCI window](#) earlier in this section.

### Document List

The Document List is only accessible for operators with an administrative security profile. This list contains the documents for the selected queue. You can view, select, and/or delete a document from the list. For example, if you need to select a specific document to work, double-click the button to the left of the date of file. You can access the Document List from the Counties and Queue List Selection or from the Queue Manager by tabbing to the **Document List** button, and then pressing **Enter**.

**Note:** Always click the **Refresh Document List** button before selecting a document from the list to avoid duplication. For more information, see [Using the Document List](#) section later in this user guide.

Workspace

Selected County:  Refresh Document List

Selected Queue:  Delete Selected Documents

Date Of File	Primary Reference	Secondary Reference	Type Of Instrument	Status	Operator
2/27/2007		CN 2007-31947	NC	Open	ATIF\vmstr
2/27/2007		CN 2007-31959	SM	InProgress	ATIF\vmstr
2/27/2007		CO 2007-31967	JDG	InProgress	ATIF\vmstr
2/27/2007	AM 25-2	CN 2007-31970	M	Open	ATIF\vmstr
2/27/2007		CN 2007-31972	JDG	Open	ATIF\vmstr
2/27/2007		CN 2007-31976	M	Open	ATIF\vmstr
2/27/2007		CN 2007-31980	SM	Open	ATIF\vmstr
2/27/2007		CN 2007-31981	JDG	Open	ATIF\vmstr
2/27/2007		CN 2007-31983	WD	Open	ATIF\vmstr
2/27/2007		CN 2007-31984	JDG	Open	ATIF\vmstr
2/27/2007		CN 2007-31986	JDG	Open	ATIF\vmstr
2/27/2007		CN 2007-31987	JDG	Open	ATIF\kige
2/27/2007		CN 2007-31988	JDG	Open	ATIF\kige
2/27/2007		CN 2007-31993	JDG	Open	ATIF\kige
2/27/2007		CN 2007-31994	SM	Open	ATIF\kige
2/27/2007		CN 2007-31997	JDG	Open	ATIF\cmh
2/27/2007		CN 2007-32000	JDG	Open	ATIF\cmh
2/27/2007		CN 2007-32001	DIV	Open	ATIF\cmh
2/27/2007		CN 2007-32002	JDG	Open	ATIF\cmh
2/27/2007		CN 2007-32006	WD	Open	ATIF\kige

Workspace | Browser

Notification

Double-click the button to the left of the Date of File to select a document from the Document List.

Click here to access the Web Browser.

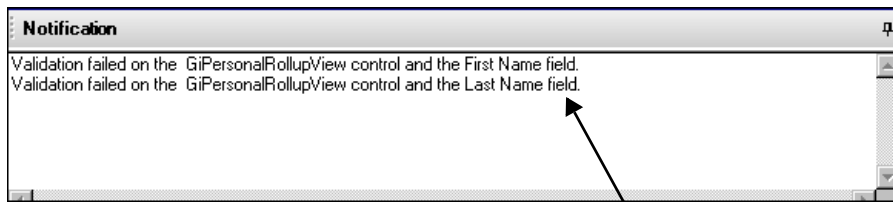
Always click this button prior to selecting a document from the list to make sure you don't send duplicate documents to the title plant.

## Browser Pane

The Browser pane allows you to access The Fund’s Internet and the Web directly from the DCI. From here, you can go to an Official Records website for the county you are working in. At this site, you can retrieve a copy of the document image you are working on to compare and enter data directly from the county image. For more information, see [Using the Browser Pane](#) later in this user guide.

## Notification Pane

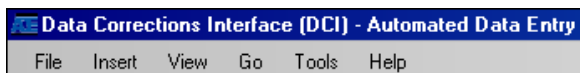
The Notification pane lists all of the outstanding error conditions related to the document you are trying to post. For example, if there is missing or incorrect data in a data field, the error will be listed in the Notification pane. To go directly to the error, double-click the error in the Warning List and your cursor will automatically be placed in the data field for which data needs to be entered or corrected. Once valid data is entered, the errors are removed from the Notification pane. If there is an error that needs to be researched, you can select the Research flag. For more information, see the [Posting Documents with Errors](#) section later in this user guide.



**Double-click the error to place the cursor in the field where you need to correct or enter data.**

## The Menu Bar

The DCI Data Entry window consists of a menu bar (File, Insert, View, etc.), a toolbar, and panes. It is important that you get familiar with the shortcut keys for the most common commands. See [Appendix C: Shortcut Keys](#) for a complete list of shortcut commands.



**Note:** Pressing the **ALT** key reveals the underlined letters you want to press on the menu bar to display each menu.

### **File**

The File menu has four commands: Post/Get Next, Post Only, Print and Exit. To display the File menu, press **ALT+F**.

#### **Post/Get Next (CTRL+N)**

Posts the document after entering all of the required data, and then displays the next document image and the appropriate TOI template for the selected TOI. If you have not entered data in a required field or have entered data incorrectly, a list of error conditions is displayed.

#### **Post Only (CTRL+O)**

Posts the document after entering all of the required data and closes the Data Entry panel. You can choose to return to the Queue Manager for Queue Selection and Next Document Options, or you can exit the application. If you have not entered data in a required field or have entered data incorrectly, a list of error conditions is displayed.

#### **Print**

Prints the current DCI application window. You can also click the **Print** button on the DCI toolbar.

#### **Exit**

Closes the DCI application.  You can also click the **Close** button on the DCI window.

### **View**

The View menu has four commands: Toolbars, Status Bar, Hide All Views, and Show All Views. Use the View menu to change the display of the Data Entry panel. To display the View menu, press **ALT+V**.

#### **Navigation Pane (ALT+F1)**

Automatically hides the Navigation pane until you are ready to use it. For more information, see [Customizing the DCI Window](#) later in this section.

### **Notification Pane**

Automatically hides the Notification pane until you are ready to use it. For more information, see [Customizing the DCI Window](#) later in this section.

### **Toolbars**

Displays an option to show or hide the standard toolbar.

### **Status Bar**

Displays an option to show or hide the status bar at the bottom of the DCI window.

### **Hide All Views (SHIFT+CTRL+A)**

Displays only the container group headings in the Data Entry panel.

### **Show All Views (SHIFT+CTRL+V)**

Expands the view to show all containers and container groups in the Data Entry panel.

---

## **Go**

The Go menu has two commands: Data Entry and Queue Manager. Use the Go menu to switch between the Data Entry panel and the Queue Manager panel on the Navigation pane. To display the Go menu, press **ALT+G**.

### **Data Entry (CTRL+1)**

Switches to the Data Entry panel from the Queue Manager panel.

### **Queue Manager (CTRL+2)**

Switches to the Queue Manager panel from the Data Entry panel.

---

## **Insert**

The Insert menu has five command categories: Name, Misc, Reference, Address and Legal. Use the Insert menu to add container groups and containers to the Data Entry panel. See [Appendix C: Shortcut Keys](#) for a complete list of shortcut commands. To display the Insert menu, press **ALT+I**.

### **Name (ALT+P) (ALT+C)**

Displays options to add container groups for Contractor, First Party, GI Names, Lender, Scrivener, and Second Party. You may then narrow your selection further to select either personal or commercial name containers in each container group.

### **Misc**

Displays options to add container groups and/or containers for Comments, Amount, Mortgage ID Number (MIN), Mortgage Type, Tax ID, and UCO Type.

**Reference (ALT+R) (ALT+S)**

Displays options to add containers for primary and/or secondary source references. Press **ALT+R** to add a primary reference container.

**Address**

Displays an option to add a Property Address container.

**Legal (CTRL+L)**

Displays options to add a Textual Legal or Legal Sub/Condo container.

---

**Tools**

The Tools menu has two commands: Options and Settings. To display the Tools menu, press **ALT+T**.

**Options**

Displays an option to change the highlight color on the image viewer corresponding to the selected data in the Data Entry panel. It also displays an option to turn the Scrolling Tooltip on and off.

**Settings**

Allows you to reset customized window settings back to the default settings.

---

**Help**

The Help menu has two commands: Shortcut Keys and About Automated Data Entry. To display the Help menu, press **ALT+H**.

**DCI User Guide (F1)**

Displays the DCI User Guide.

**Shortcut Keys (CTRL+F1)**

Displays a list of the DCI Shortcut Keys. See [Appendix C: Shortcut Keys](#) for a complete list of shortcut commands.

**About Data Corrections Interface (DCI)**

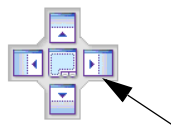
Displays the version number, date created, a brief description of the DCI, and the current user.

## Customizing the DCI Window

You can customize the DCI window to your viewing preference by moving the panes and docking them to more convenient locations in the DCI window. If you decide that you want the panes back to their the original location, just reset the window back to the default settings. You can position any of the panes and panels available from the DCI window (Image Viewer, Browser, Document List or Notification) to the top, bottom, right, or to the left position of the DCI window and even hide them from view until needed. For example, you may want the Browser pane out of view, but also directly accessible so you can quickly retrieve document images from the county websites for quick comparison to the document displayed in the Image Viewer. This way, you can easily get back to the Data Entry panel to make the necessary corrections.

**Moving a pane** To move a pane to a new location on the DCI window, do the following:

1. Click and drag the title bar for the pane (Workspace, Browser, or Notification) to the location where you want to dock the pane. The navigation compass is displayed.



Dragging the pane over the right compass point arrow will dock the pane to the right of the window.


2. Drag the pane over the compass point arrow for the direction where you want to dock the pane. The location where the pane will be placed is shaded.
3. Release the mouse.

---

## Hiding a pane

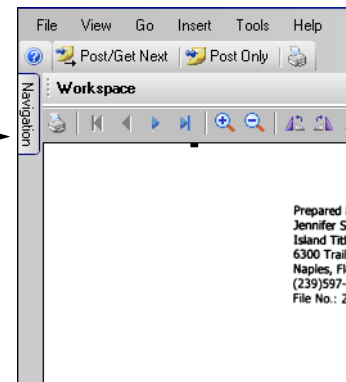
Once you dock a pane, you can hide it until you are ready to use it, allowing you to have additional space for the data entry in the DCI window.

To set a pane to Auto Hide, do the following:

1.  Click the **Auto Hide** pushpin on the upper right corner of the pane's title bar so that the pin is pointing to the left. The window will hide when it's not being used. A tab with the name of the pane will display on the side of the window where the pane is hidden.

- To display the pane again, move the mouse over the tab for the hidden pane.

Move your mouse over the tab to redisplay the hidden pane.



**Note:** To hide the Navigation pane, press **ALT+F1**. For all other panes, use the Auto Hide pushpin. See [Appendix C: Shortcut Keys](#) for a complete list of shortcut commands.


### Resetting panes to their original setting

If you decide to change your window settings, it's often faster to return to the original DCI window setup rather than rearranging the panes again.

- To reset the DCI Window to the default settings, select **Tools > Settings > Reset to Default** from the menu bar.

### Printing the current DCI window

Do one of the following:

- Select **File > Print** from the menu bar, and then click the **OK** button.
-  Click the **Print Current View** button from the top toolbar. An image of the current DCI window is printed.



## Working in the Data Entry Panel

---

This section provides a detailed description on how to use and navigate through the Data Entry panel. It also explains the terminology used in the DCI's Data Entry panel.

The Data Entry panel is a versatile template that changes according to the TOI and Description. Although in most cases the TOI is selected by the OCR engine with the appropriate data fields already populated, there will be some decisions you must make as an operator regarding the type of information you verify, correct, and/or enter. Container groups help you do just that, quickly and efficiently by allowing you to add groups of related data fields to the TOI template as necessary.









### Container Groups, Containers, and Container Fields




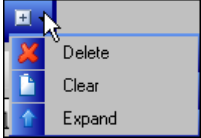
The fields in the Data Entry panel are arranged by container groups. A container group is the main label that is displayed based on the selected TOI and Description. Within each container group, there is another sub-label called a container that describes the type of container fields it holds. Container groups may consist of one or more containers. Container fields are the actual data fields within the containers. For example, under the GI Names container group label, GI Personal would be the container, and container fields are the data fields for GI personal names. For some container categories, the container group, container, and sometimes the container field(s) share the same name.



## Container Buttons

The Title Bars for the container groups and containers display various buttons. To select a button, click it from the container group or container. However, we recommend using shortcut keys for these functions, if available. See [Appendix C: Shortcut Keys](#) or select **Help > Shortcut Keys** from the main menu for the list of shortcut commands.

Button	Name	Description
	Switch Parties (CTRL+SHIFT+S)	Switches the first party name information with the second party information.
	Add Personal Name (ALT+P)	Adds a Personal Name container.
	Add Commercial Name (ALT+C)	Adds a Commercial Name container.
	Switch Name Type (CTRL+W)	Switches a Personal Name container to a Commercial Name container or a Commercial Name container to a Personal Name container. <b>Note:</b> You need to reenter the data not retained after switching the name type.
	Copy (CTRL+C)	Copies text from one container to be pasted to another container in the Data Entry panel.
	Paste (CTRL+V)	Pastes text from a copied container to another container in the Data Entry panel.
	Add an Address	Adds an Address container.
	Add Other Containers	Adds the specific container based on the container group. For example, if you click this button on the Tax ID container group, the Tax ID container will be added.

Button	Name	Description
	Collapse Section	<p>Displays a drop-down menu when you click the <b>drop-down arrow</b>. From here, you can clear the fields in a container or container group or collapse the container or container group. If it is an additional container or container group, a Delete option will also display.</p> 
	Expand Section	<p>Displays a drop-down menu when you click the <b>drop-down arrow</b>. From here, you can clear the fields in a container or container group or collapse the container or container group. If it is an additional container or container group, the Delete option will also display.</p> 

### **Navigating through the Data Entry panel**

As you tab through the Data Entry panel, any text pre-filled by the OCR engine is highlighted and centered in the document image to help you easily locate where the information was extracted.

Also, the Image Viewer scrolls simultaneously with the Data Entry panel so that your location in the Data Entry panel always matches the specific text in the document.

The default background color for all container groups, with the exception of GI Names, is blue. GI Names defaults to gray. If you change the default windows color scheme, the background color of your DCI containers may change.

To navigate through the Data Entry panel, do one of the following:

- To tab from field to field, press the **TAB** key.
- To back tab from field to field, press **SHIFT+TAB**.
- To move to the next container group, press **CTRL+PAGE DOWN**.
- To move to the previous container group, press **CTRL+PAGE UP**.

---

### **Inserting a new container group**

You can add additional containers and container groups to a TOI template as necessary. However, you can only add one UCO Type, Mortgage Type, and Scrivener, and Amount container. You can add additional amount containers when the TOI is DM or WDM.

To add a container group, do one of the following:

- Press the appropriate shortcut keys to add the specific container group/container you want. See [Appendix C: Shortcut Keys](#) for a complete list of shortcut commands.
- On the Insert menu, click the type of container (Name, Misc, Reference, Address, or Legal), and then the click the specific container.

### Adding another container to an existing container group

To add another container to an existing container group, do one of the following:

- Click the appropriate button on the top right corner of the container group header bar. See [Container Buttons](#) earlier in this user guide for a complete list of container buttons.
- Press the appropriate shortcut keys to add the specific container or container group you want. See [Appendix C: Shortcut Keys](#) for a complete list of shortcut commands.
- On the Insert menu, click the type of container, and then click the specific container.

### Reordering first and second party name containers

You can easily sort the first and second party name containers to match the order they are displayed on the document image.

To reorder first and second party name containers, do one of the following:

- To move a name container up, press **CTRL+ARROW UP**.
- To move a name container down, press **CTRL+ARROW DOWN**.

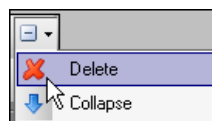
*Note:* When you use the shortcut key method, the cursor must be in the data field of the container you want to move.

### Deleting a container or container group

You can only delete additional containers or container groups that you have added to the original template created for the TOI and/or description. If the container includes required field(s), you must have at least one container remaining.

To delete a container or container group, do one of the following:

- Press **CTRL+DELETE**.
- Click the **drop-down arrow** on the top right corner of the container group or container header bar, and then select **Delete**.



- Right-click on the container header bar, then select **Delete**.

*Note:* When you use the shortcut key method, the cursor must be in one of the data fields of the container you want to delete.

**Entering data in required container fields**

Most required data fields can be bypassed by typing the (I) Dupe key in the field. You can also "dupe all" required fields within a container by pressing **CTRL+U**. See [Appendix C: Shortcut Keys](#) for a complete list of shortcut key commands. When you skip a required field, an invalid field indicator is displayed to the right of the field, but you can still tab to the next field. When you try to post a document for which a required field is invalid or blank, a Warning List is displayed that allows you to try to fix the error or send the document for review. For more information, see the [Posting Documents with Errors](#) section later in this user guide.

**Invalid Field Indicators display when required fields are skipped**



## Entering Specific Data

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This section provides step-by-step instructions for how to enter and post specific document information using the DCI. During the OCR process the TOI is identified and the data is automatically extracted from the document image and inserted into the appropriate required fields.

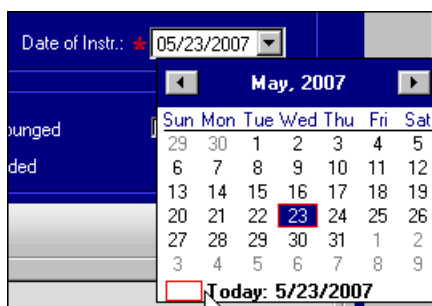
**Note:** Required fields are marked with a red asterisk. Any pre-filled data is highlighted on the document image as you tab through the data fields in the Data Entry panel.

### Recording Reference

The Recording Reference container contains fields for the Primary Reference, Secondary Reference, Date of File, Date of Instrument, Document Modifiers and Instrument Type. The Primary Reference, Secondary Reference, and Date of File information is extracted from the document image files by the Media Processing Center. This information is loaded to the DCI along with the document images. You will need to do the following:

- Verify/correct the Primary Reference, Secondary Reference, Date of File and Date of Instrument.

**Note:** The default date for the Date of Instrument is 01/01/1900.



If the date is not pre-filled for you with the correct date, you can enter or select the correct date. To select a date from the calendar, click the **drop-down arrow** next to the Date of File field, select the Today's date check box, or the specific date.

- If applicable to the document in view, select from the available Document Modifiers. They include: Corrected, Expunged, Redacted, Re-recorded, and Voided.

## Entering Data When a TOI is Identified

When a TOI is identified for a document, a unique template with pre-filled data, captured by the OCR engine, is displayed in the Data Entry panel. Verify that the data is correct and, if necessary, correct and/or enter any missing information.

## Entering Data When a TOI is not Identified

If the TOI cannot be identified, no TOI template will be displayed and you must select the correct TOI. If you select a TOI only, click the **Refresh** button to generate the template. If you select a TOI and Description, the template will automatically generate. Continue to tab to each field within the containers and enter all required fields marked with a red asterisk (\*).

**Note:** Click the Illegible check box located in the Instrument Type container if a portion of the document is illegible.

## Entering Names

Based on the TOI, the DCI provides you with containers with the appropriate data fields for the following types of personal and commercial names: Contractor, First Party, GI Names, Lender, Scrivener, and Second Party.

The Personal and Commercial Name fields are the same for Contractor, First Party, Lender, and Second Party containers. The fields in the GI and Scrivener containers are slightly different. To add another personal or commercial name, click the appropriate button on the Container group header. For a list of container buttons and their descriptions, see [Container Buttons](#) earlier in this user guide. First and Second Party containers can also be reordered to match how the names and addresses display on the document. See [Appendix C: Shortcut Keys](#) for a complete list of shortcut commands. A document can contain only one Scrivener container.

### Personal Names

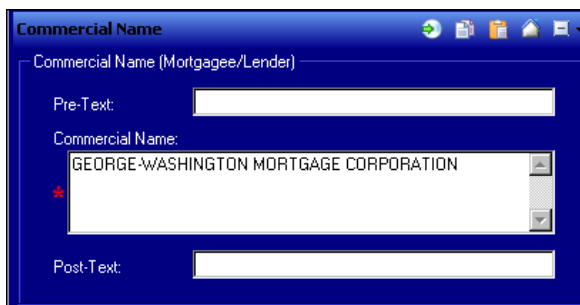
1. Verify/Correct/Enter the full name of the party as specified by the fields displayed, tabbing to each field. The first and last name fields are always required. All other fields (i.e. Pre-Text, Middle Name, Lineage, Status, and Post-Text) are optional.
2. Select the status. To select a status, tab to the Status field, begin keying the appropriate status until the status you want is displayed, and then press **Enter**.

The screenshot shows a software window titled "Contractor" with a sub-header "Personal Name". The form contains the following fields:

- Name (Contractor): [Empty]
- Pre-Text: [Empty]
- First Name: \* JAMES
- Middle Name: R
- Last Name: \* JOHNSON
- Lineage: [Empty]
- Status: WIDOWER (selected from a dropdown menu)
- Post-Text: [Empty]

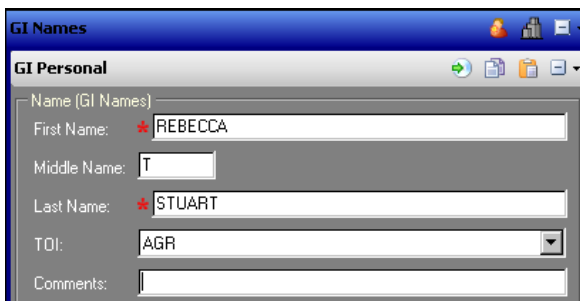
**Commercial Names**

Verify/Correct/Enter the full business name and address in the Commercial Name data field. The Commercial Name field is always required. The Pre-Text field is required for Combo TOIs only. The Post-Text field is optional.



**GI/Personal Names**

Verify/Correct/Enter the name of the party as specified by the fields displayed, tabbing to each field. The first and last name fields are always required. The Comments field is required for some TOIs. All other fields are optional.



**GI/Commercial Names**

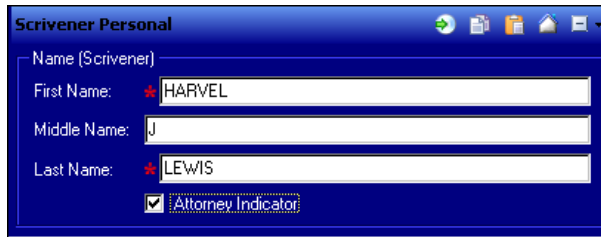
Verify/Correct/Enter the full business name in the Commercial Name data field. The Commercial Name is always required. The TOI field is optional. The Comments field is required for some TOIs.



**Note:** The default background color of a GI Personal and GI Commercial container is grey to allow you to easily distinguish it from a PI name container. If you change the default windows color scheme, the background color of your DCI containers may change.

**Scrivener/  
Personal Name**

Verify/Correct/Enter the first and last name of the scrivener specified by the fields displayed. The Middle Name field is optional. If the Scrivener is an attorney, click the **Attorney Indicator** check box to select it.



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**Scrivener/  
Commercial Name**

Verify/Correct/Enter the business name of the scrivener in the Commercial Name data field. If the Scrivener is a law firm, click the **Law Firm Indicator** check box to select it.



**Note:** Only one container group and container can be added to a TOI template for Scrivener Personal or Commercial Names. If both a personal and a commercial scrivener name appears on the a document image, enter the commercial name only.

See the *Data Center Training Manual* for more information on the Data Center business rules for entering names.

## Entering Miscellaneous Information

Miscellaneous information refers to other container groups or containers for which the data needed to enter depends on the TOI. Comments, Amount, MIN, Mortgage Type, Tax ID, and UCO Type all vary depending on the type of document.

### Comments

To add a Comment container, select Insert > Misc > Comments from the menu bar. If comments are required for a TOI, the Comment container will display in the TOI template.

When entering comments, follow the current data entry standards.

The Comment container has an optional checklist of the most common attachments, document information, and comments. To select an attachment, click the check box for any attachments relevant to the document.

### Amount

All TOIs except DM and WDM will allow you to enter only one Amount container. DM and WDM TOI will allow you to enter two Amount containers (Mortgage and Doc Stamp).

1. Verify/Correct/Enter the amount in the Amount data field, and then press the **TAB** key.
2. Select the amount type from the drop-down list. Enter the first letter of the Amount Type, press the **UP** or **DOWN ARROW** key to go to the specific type in the list, and then press **Enter**.

**Mortgage ID Number (MIN)**

A MIN is often given when Mortgage Electronic Registration Systems, Inc. (MERS) is involved in the transaction. MIN is optional for all mortgage related documents.

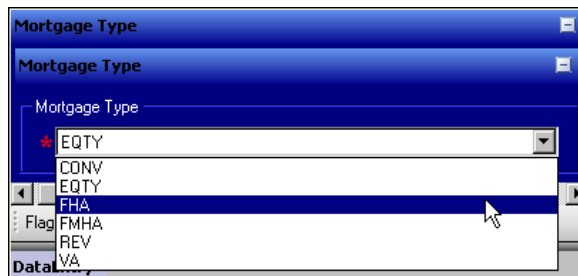
Enter the complete MIN number in the MIN data field, excluding any hyphens shown in the document.



*Note:* The Mortgage Identification Number is limited to eighteen digits. Once you enter the eighteenth digit, your cursor will automatically move to the first data field in the next container.

**Mortgage Type**

Select the mortgage type from the drop-down list. Enter the first letter of the mortgage type, press the **UP** or **DOWN ARROW** key to go to the specific type of mortgage in the list, and then press **Enter**. Only one Mortgage type container can be added.



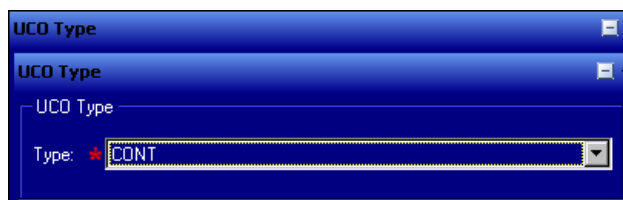
**Tax ID**

Enter the tax identification number or tax parcel ID number on the deed. You can add more tax IDs as needed.



**UCO Type**

Enter the first letter of the UCO type you want, press the **UP** or **DOWN ARROW** key to go to the specific type of mortgage in the list, and then press **Enter**. Only one UCO Type container can be added.

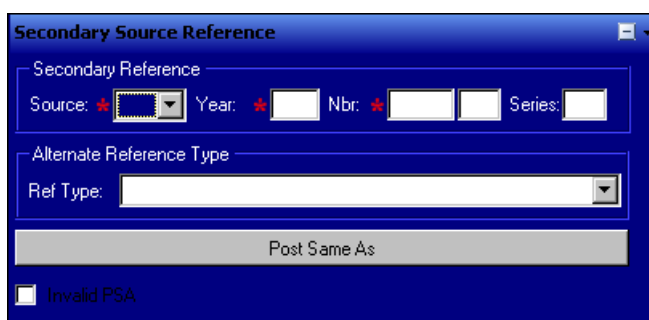
**Entering Reference Information**

You can enter multiple reference information for previously filed documents and identify the type of reference entered (i.e. Tax ID, Re-record, Corrective, and Lis Pendens) by inserting additional primary or secondary reference containers.

**Primary or Secondary Source Information**

1. Enter the Source code, and then press **Enter**.
2. Enter the primary source (book, and page number), or secondary source (year, number, and series) information.
3. If applicable, enter the suffix in the field to the right of the Book and Page fields in the Primary Reference container or to the right of the Nbr field in the Secondary Reference container.

If applicable, select the **Alternate Reference Type** from the drop-down list. Enter the reference type, and then press **Enter**.



**Note:** For more detailed information about PSA, see the [Post Same As \(PSA\)](#) section later in this user guide.

## Entering Address Information

You can add one address per name for name containers, first party, second party, and contractor/lender containers. First and second party containers allow you to enter more than one address container for multiple names.

### Property Address

Enter the address of the property as specified by the data fields displayed, tabbing to each field. The City, State, and Country fields automatically populate after you type the zip code in the ZIP field, and then press the **TAB** key.

Use the Addr2 data field for any additional address information that comes after the street address, such as a suite number.



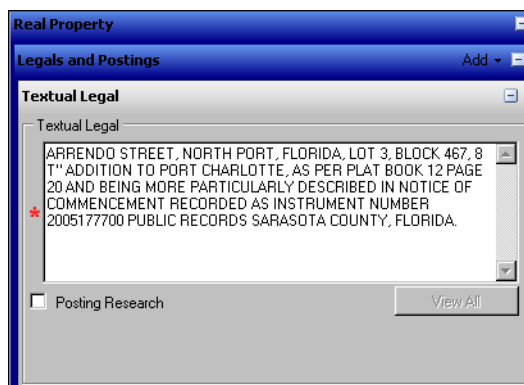
The screenshot shows a window titled "Property Address" with a sub-section "Address". It contains several input fields: "Addr1" with the value "2200 LEE AVENUE", "Addr2" with "SUITE 330", "ZIP" with "32828", "City" with a dropdown menu showing "ORLANDO", "State" with "FL", and "Country" with "USA". There are red star icons next to the Addr1 and City fields.

## Entering Legal Information

### Textual Legal

For most documents, the textual legal is extracted from the document image and entered in the Textual Legal field. The DCI allows you to have multiple textual legals. When a Textual Legal posting container is added, the container is automatically grouped with any existing textual legal containers. If the field length is exceeded, an error message is displayed alerting you to verify that all important legal descriptions have been added.

Verify the legal description is the same as it is shown on the document. If not, correct and/or enter the correct legal description.



The screenshot shows a window titled "Real Property" with a sub-section "Legals and Postings". It contains a "Textual Legal" field with a long, multi-line legal description: "ARRENDO STREET, NORTH PORT, FLORIDA, LOT 3, BLOCK 467, 8 T" ADDITION TO PORT CHARLOTTE, AS PER PLAT BOOK 12 PAGE 20 AND BEING MORE PARTICULARLY DESCRIBED IN NOTICE OF COMMENCEMENT RECORDED AS INSTRUMENT NUMBER 2005177700 PUBLIC RECORDS SARASOTA COUNTY, FLORIDA." There is a red star icon next to the first line of the text. Below the field is a checkbox for "Posting Research" and a "View All" button.

## Legal Sub Condo

The DCI allows you to have multiple Legal Sub/Condo postings. For most documents, the Source of Plat is extracted from the document image and entered in the Source of Plat field.

1. Verify/Correct/Enter the Source of Plat, Book/Yr, Page/No and suffix, if necessary.
2. Tab to the **Go** button, and press **Enter**. The Subdivision Master Detail is displayed.

**Note:** If the Subdivision Master Detail does not display, select the PI Research flag to show on the appropriate reports.

3. Verify that the Subdivision Master Detail information matches the legal description on the document image.
4. Enter all applicable posting level(s).

**Legal Sub/Condo**

Source of Plat  
 Source: PB Book/Yr: 2 Page/No: 4 Go

Subdivision Master Detail  
 Source: PB Book/Yr: 2 Page/No: 4  
 VERSAILLES

L1 L2 L3 / L1 L2 L3 / L1 L2 L3  
   /    /

Date of Plat: 8/17/1925

Summary | Detail

	Level 1	Level 2	Level 3	FT	Replat	Unauthorized Legal
	1	A		F	<input type="checkbox"/>	<input type="checkbox"/>
	5	A			<input type="checkbox"/>	<input type="checkbox"/>

Add Posting Expand From/To Summary

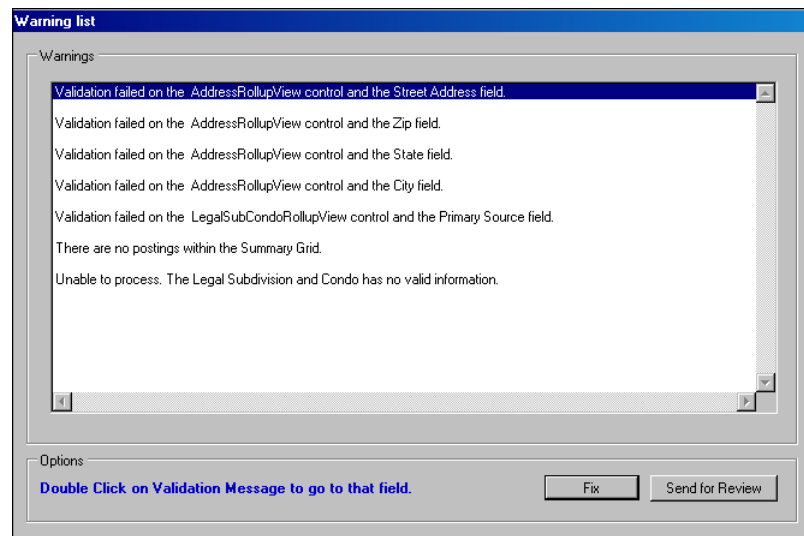
**Note:** To enter a consecutive range of legals, enter the first level and type an “F” in the FT field. To enter the last legal in the range, type a “T” in the FT field. For an expanded view of all legals typed, click the **Expand From/To Summary** button. To add another posting row, press **CTRL+TAB**.



## Posting Documents with Errors

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This section explains what you can do if you receive posting validation errors. If you try to post a document and have entered invalid data, skipped a required field, or failed a validation edit, a Warning List is displayed that lists all of the posting validation errors that need to be corrected before a document can be posted.



## How to Fix Errors in the Data Entry Panel

If you try to post a document and have entered invalid data or skipped a field, the Warning List is displayed with any errors or missing data from the Data Entry panel fields.

1. Do one of the following:
  - Tab to the **Fix** button, and then press **Enter** on the Warning List to return to the first field error in the Data Entry panel.
  - Double-click a specific error validation message on the Warning List to move the insertion point to that particular field in the Data Entry panel.

Repeat this step for all error conditions listed.

**Note:** Any remaining error(s) will continue to display in the Notification pane until it is corrected. To return to the specific field with the posting validation error, tab to the error fields in the Data Entry panel or double-click the specific validation message in the Notification pane.

2. Correct/enter all information in the required fields.
3. Do one of the following:
  - Press **CTRL+N**.
  - Press **CTRL+O**.

**Note:** If the Warning List is displayed again and you are unable to correct the error condition, tab to **Send for Review** button, and press **Enter**. For more information, see the [Posting Documents with Errors](#) section later in this user guide.

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## How to Send a Document for Review

When you send a document for review, it goes to the data center and appears on the appropriate report.

### To send a document for review:

Tab to the **Send for Review** button, and then press **Enter**.

One of the following will occur:

- If there are posting error and other errors in the Warning List the Document Review flag is automatically set and the document is displayed on the daily Workflow Report.
- If there are only posting errors in the Warning List, the document is displayed in the Unauthorized Legal list.

**Note:** The Document Review flag is not automatically set if there are only posting errors in the Warning List. The Unauthorized Legal flag will remain set and the document is displayed on various reports.

## Flags

If you are unable to complete a document in the DCI, the system may automatically set or you can click the appropriate button to set one or more of the flags listed below. Document Flag buttons are located at the bottom of the Data Entry panel.

Type of Flag	Description
Mapping	<p>If the OCR engine identifies a document for mapping based on defined acreage rules, the Mapping flag is automatically set.</p> <p>You can click the Mapping button to select this flag if it is not already set by the system for the following conditions:</p> <ul style="list-style-type: none"> <li>• Both Sub/Condo and Acreage legals are on the document.</li> <li>• Subdivided metes and bounds (e.g., commence at, start at, etc.).</li> <li>• A portion of the street or vacated alley is referenced as part of the parcel.</li> <li>• “Together with” appears in the legal description and is acreage or the portion of a street or vacated alley.</li> <li>• “Vacated alley” appears in the legal description and the flag.</li> <li>• Mapping conditions not automatically flagged by the OCR engine.</li> </ul> <p>You can deselect this flag if direct posting is possible and the TOI is DOC, DOC AMD, R, R AMD, PLT, E, ORD, or RSN.</p>
PI Research	<p>You can click the PI Research button to set this flag if any posting related research items need to be resolved by the data centers on a PI document. For example, research needed to find an associated Lis Pendens reference or to determine the correct case number for a PI document.</p>

Type of Flag	Description
Document Review	<p>The system automatically sets this flag when the TOI is JUN and a legal description or GI Names are present.</p> <p>You can click the Document Review button to set this flag for the following conditions:</p> <ul style="list-style-type: none"> <li>• A manual audit of the document is needed.</li> <li>• You are unable to complete required (or optional) fields.</li> <li>• You cannot determine the document type, or it's a document type for which no TOI template has been created.</li> <li>• Training situations.</li> </ul>
GI Research	<p>The system automatically sets this flag when the TOI is ANE, ANL, BNK, CAV, COM, CON, DC, DIV, DKT, ECL, ETL, FDS, FN, FTL, GRD, ICM, INC, NR, NTC, NTL, PA, PRO, RET, RFT, RIC, RNA, RNE, RPA, SEP, TAG, TAP, TR, VLN, VML, or WIL and there are no GI Names added to the DCI. Also, when the TOI is AFF and the description is other than cont/marr, status, or identity.</p> <p>You can click the GI Research button to set this flag for the following conditions:</p> <ul style="list-style-type: none"> <li>• You have an illegible GI name.</li> <li>• You have an illegible case number in a GI name container.</li> <li>• You are unable to enter required or optional files on a GI document.</li> </ul>
Incomplete Legal	<p>This flag is automatically set by the DCI when the OCR engine determines that a legal description is appearing on multiple pages of a document. You cannot manually set the Incomplete Legal flag. However, if necessary, you can deselect the Incomplete Legal check box in the Textual Legal container after verifying the textual legal is complete.</p>

<b>Type of Flag</b>	<b>Description</b>
Low Confidence Legal	This flag is automatically set when the OCR engine recognizes a textual legal key word indicator outside the parameters of the legal description in the image. You cannot manually set the Low Confidence Legal flag. However, if necessary, you can deselect the Low Confidence Legal check box in the Textual Legal container after verifying the textual legal has been entered correctly.
Replat	This flag is automatically set when validated levels for a Sub/Condo posting are checked against the replat tables and replats are found. This flag is located in the Legal/Sub Condo container and can only be selected/deselected by the DCI.
Unauthorized Legal	This flag is automatically set when validated levels for Sub/Condo postings are checked against the Subdivision Master Record and no match is found. This flag is located in the Legal/Sub Condo container and can only be selected/deselected by the DCI.

Type of Flag	Description
Posting Research	<p>You can select this flag or it is automatically set by the DCI.</p> <p>You can select the Posting Research check box in the Textual Legal container to set the flag if further posting research is required for conditions other than those described for setting the Mapping flag (see information for the <a href="#">Mapping flag</a>).</p> <p>Some of the conditions that may set this flag automatically by the DCI are as follows:</p> <ul style="list-style-type: none"> <li>• There is a textual legal, but no sub condo rows (levels) and/or no acreage rows (levels);</li> <li>• No legal is present for the following TOIs: AA, AD, ADD, AFF, ALS, AM, ANE, ANR, CA, CHA, CIT, CL, CS, CT, CTF, D, DIS, DM, DOC, E, EXD, FA, FSD, GD, JND, LN, LP, LS, LT, M, MMA, MOD, NC, OOT, OPT, ORD, PAL, PAT, PFB, PLT, PR, PRD, PRM, QCD, R, RE, RL, RNE, RSN, RSV, SA, SAL, SD, SL, SLL, SM, STK, SUB, SWD, TRD, TXD, UCC, UCO, UT, VLN, VWL, WD, and WDM.</li> </ul> <p>When necessary, you can deselect the Posting Research check box in the Textual Legal container if it is automatically set by the DCI.</p>

## Post Same As (PSA)

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The Post Same As (PSA) function is often used for property documents that reference a previously recorded document. It allows you to quickly find the previously filed document and copy the legal pointers, party names and/or legal description.

### How to use the Post Same As function

1. Enter the Secondary or Primary Reference information, if the OCR engine did not already pre-fill these fields.

2. Select the Alternate Reference Type, if applicable.

**Note:** If there are one or more references that must be entered on a document, you can add the appropriate Reference containers for which to enter the information. Press **ALT+R** to add a primary reference, or press **ALT+S** to add a secondary reference. See the [Appendix C: Shortcut Keys](#) for a complete list of shortcut commands.

3. Do one of the following:
  - Press **CTRL+J**.
  - Tab to the **Post Same As** button, and press **Enter**.

The Post Same As window is displayed with the previously filed document information.

4. Do one or more of the following:

- Deselect the **PSA** check box if you do not want to copy the current legal postings. This also disables the options to copy the Legal Description, First Party and Second Party. You can click the **OK** button to return to the Data Entry panel.
- Click the **OK** button to copy the posting level information from the previously filed document. The posting level(s) summary information is added to the Summary tab in the Legal Sub/Condo container.
- Select the **Legal Description** check box to append the legal information from the previously filed document. The legal description for the previously filed document is added to the Real Property container group and appended to all existing legals.



- Select the **First Party** check box to replace the DCI's first party information from the previously filed document. The first party name(s) are added from the previously filed document to the First Party container group, replacing any/all existing first party data.
- Select the **Second Party** check box to replace the DCI's second party information from the previously filed document. The second party name(s) from the previously filed document is added to the Second Party container group, replacing any/all existing second party data.
- Select the **Next Ref** button to copy the posting level information from the previously filed document. If multiple references exist, the previously filed document information is displayed in the PSA window. Repeat this step until you have completed posting all of the references. This button is only enabled if more references exist.

**Note:** If there are no more references to view, the Next Reference button is disabled. Tab to the **OK** button, and press **Enter** to return to the Data Entry panel.

5. If the PSA transaction fails, a PSA error message is displayed and you can do one of the following:
  - Repeat the steps above, correcting the reference information, select the **Alternate Reference Type**, if applicable for steps 1 and 2.
  - Click the **Invalid PSA** check box to select it.

**Note:** You can also select the Invalid PSA check box if the source reference is invalid.

6. Do one of the following

-  Tab to the **Post/GetNext** button, and press **Enter**, or press **CTRL+N**.
-  Tab to the **Post Only** button, and press **Enter**, or press **CTRL+O**.

**Note:** If replats are detected, the Replat flag will be automatically set on the Summary tab. If unauthorized textual legal(s) are detected, the Unauthorized Legal flag is automatically set on the Summary tab.



## Working with Documents in the Image Viewer

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The Image Viewer allows you to perform the following functions:

- Print the current view of the document image.
- View the document image alongside the Data Entry panel as you are entering data.
- Ability to automatically scroll through the document image simultaneously as you tab through the Data Entry panel.
- View where the pre-filled data from the Data Entry panel is located on the document. The text is highlighted and centered on the document image.
- Adjust the view of documents.
- Select and copy text directly from the document image to the required fields.

### Image Viewer Toolbar


The Image Viewer toolbar has ten buttons displayed at the top of the Image Viewer in the Workspace pane: Print, Zoom In, Zoom Out, Rotate Left, Rotate Right, Flip Horizontal, Flip Vertical, Fit to Height, Fit to Width, and Fit to Window.



### Printing a Document Image

You can print a document image that is displayed in the Image Viewer.

#### Print a document image



1.  Click the **Print** button on the Image Viewer toolbar. The Print dialog box displays.
2. Select the Printer for which you want to print from the Name drop-down list, if it is not already selected.
3. Select a print range option.
4. Click the **OK** button.

## Adjusting the View of Documents

You can change the magnification level, rotate left/right, flip horizontal/vertical, and fit to height/width of a document.

### Increase/ Decrease magnification

Do one of the following:



-  **CTRL+PLUS SIGN (+)**  
To increase magnification, click the **Zoom In** button.
-  **CTRL+MINUS SIGN (-)**  
To decrease magnification, click the **Zoom Out** button.

For greater or lesser magnification, press the appropriate button or shortcut keys multiple times.

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### Rotate document left/right

Do one of the following:

-  To rotate the document 90 degrees left (counterclockwise), click the **Rotate Left** button.
  -  To rotate the document 90 degrees right (clockwise), click the **Rotate Right** button.
- 




### Flip document horizontal/ vertical

Do one of the following:

-  To flip the document horizontally, click the **Flip Horizontal** button. Clicking this button changes the image to a mirror image.
  -  To flip the document vertically, click the **Flip Vertical** button. Clicking this button gives you an upside-down image.
- 

### Fit document to height/width window

Do one of the following:

-  To fit the document to the height of the window, click the **Fit To Height** button.
-  To fit the document to the width of the window, click the **Fit To Width** button.
-  To fit the document to the window, click the **Fit To Window** button.

## Striping Text From the Document Image

You can greatly reduce the time it takes to enter information in many of the data fields on the Data Entry Panel by using the DCI's striping feature. Because the documents have been scanned during the OCR process, much of the data is available for striping. Striping is the technique used to copy the scanned information from the document image to a specific field in the Data Entry panel. There are four striping features that you can use to copy and paste text into the Data Entry panel.

**Note:** Documents or portions of documents that have not scanned clearly cannot be striped. Issues could occur during the OCR process or the document could be unreadable by the OCR engine causing the striping to fail. OCR cannot be performed on hand written documents.

### Using the wrap around text striping

Wrap around text striping is the most commonly used striping feature. Use this feature when you want to copy a block of text in the same line.

#### To use the wrap around text striping:

1. Click or tab in the data field in the Data Entry panel where you want to copy and paste the text.
2. Hold down the left mouse button as you drag it over the text to highlight it in the Image Viewer, and then release the mouse button. The text is copied and separated into the appropriate data fields.

### Using the controlled text striping

Controlled text striping is when you stripe a smaller, more detailed area of a document image.

#### To use the controlled text striping:

1. Click or tab in the Data Entry panel data field where you want to paste the text.
2. Hold down the **CTRL key + the left mouse button** and draw a box around the desired block of text you want to copy and paste in the Image Viewer, and then release the mouse button. The text is copied and separated into the appropriate data fields in the Data Entry panel.

### Using the append text striping

Append striping is primarily used to attach lengthy textual legal descriptions into the Data Entry panel. OCR technology does not have the ability to scan textual legals that appear on multiple pages within a document.

#### To use the append text striping:

1. Click or tab in the Data Entry panel data field where you want to paste the legal description.
  2. Click the end of the textual legal description you want to append.
  3. Hold down the **SHIFT key + the left mouse** button as you drag it over the text to highlight it in the Image Viewer.
  4. Release the **SHIFT key + the left mouse** button. The text is automatically copied and attached into the appropriate data field in the Data Entry panel.
- 

### Using single word striping

You will find using the Single Word Striping feature to be the quickest way to copy and paste a single word into a data field in the Data Entry panel.

#### To use single word striping:

1. Click or tab in the Data Entry panel data field where you want to paste a single word.
2. Double-click on the single word in the document image you want to copy and release the left mouse button. The text is automatically pasted into the appropriate data field.

## Using the Browser Pane

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The Browser Pane can be used as a tool for quick access to The Fund's Intranet and the Web. The Intranet has many helpful resources and links that can help you do the necessary research you need to enter documents correctly. For example, some of the resources the Intranet provides are:

- Access to County Web Sites
- Documentation and Training Manuals
- Field by Field Business Rules
- TOI Guide
- ADRS Image Certification Dates

### Toolbar functions

The type of document you open from an Intranet link determines the toolbar that displays for you. For example, if the document is a Word document, you will see the Microsoft Word toolbar displayed. For information on how to use any of the tools for other applications, please see the appropriate online Help for that application.

*Note:* Depending on the application, some of the toolbar buttons may not be valid in the DCI.

### Common Uses for the Browser

The main use for the Browser in the DCI is to save you time to search a county website when checking the quality of a document. At times documents are not scanned clearly and you can find a better quality document directly from the county website without having to leave the DCI to go to the Internet.



## Using the Document List

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If you have an administrative security profile, you will have access to the most current documents on the Document List for which you have access. If you have this authority, you will also have the ability to perform the following functions within these queues:

- Refresh the list to see the current status of the documents
- Select a specific document from the list for which to work
- Delete a single or multiple documents from the list to delete
- Sort the document in various order depending how you want to view them in the list.

The Document List contains the Date of File, Primary Reference, Secondary Reference, Type of Instrument, Status, and Operator ID for all documents in the queue. Two asterisks (\*\*) in the Type of Instrument column indicates that the text could not be extracted from the document image and a TOI template could not be generated for the Data Entry panel.

---

### Viewing the Document List

1. From the County Selection and Queue List or Queue Manager panel, Tab to the **Document List** button, and press **Enter**. The Document list is displayed.
2. Click the **Refresh Document List** button to make sure you are viewing the current status.

*Note:* It may take a few moments for the Document List to display while the document data and image are being retrieved.

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### Sorting the Document List

Click the column header for the column you want to sort by (for example, Date Of File, Primary Reference, Secondary Reference, Type of Instrument, Status, Operator).

---

### Selecting a document to work in a queue

Double-click the button to the left of the row for the document you want to select. The entire row is highlighted, and one of the following is displayed:

- A TOI template will display for you to verify the information.
- A blank template with (\*\*) two asterisks in the TOI field is displayed.

*Note:* For more information, see the [Entering Specific Data](#) section earlier in this user guide.

**Deleting a single document**

1. Click the button to the left of the row for the document you want to select. The entire row is highlighted.
  2. Click the **Delete Selected Documents** button. The document is deleted from the DCI and you must notify the Media Processing Center. For more information, refer to the current data entry standards.
- 

**Selecting and deleting multiple nonconsecutive documents**

1. Press and hold the **CTRL** key, and click the buttons to the left of the rows for the specific documents you want to select.
  2. Click the **Delete Selected Documents** button. The documents you selected are deleted from the DCI and you must notify the Media Processing Center. For more information, refer to the current data entry standards.
- 

**Deleting consecutive documents**

1. Hold down the **SHIFT** key, and click the first document you want to select, and then the last consecutive document. The consecutive range of documents in the list are highlighted.
  2. Click the **Delete Selected Documents** button. The consecutive range of documents you selected are deleted.
- 

**Deleting all documents**

1. Click the top left button. The documents in the list are highlighted.
2. Click the **Delete Selected Documents** button. The documents you selected are deleted from the DCI and you must notify the Media Processing Center. For more information, refer to the current data entry standards.

## Appendix A: Windows and DCI Standards

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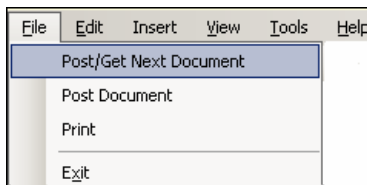
For easy reference, this appendix lists some of the standard Windows and DCI terms alphabetically, along with their descriptions and how they are used in the DCI application. If there is a shortcut key combination that allows you to use the keyboard without using the mouse, only that method is explained.

### ALT key

**The ALT key can be used in combination with other keys to perform shortcuts for specific functions.**

Press the **ALT** key together with the specified character key. For a list of shortcut key commands, select Help > Shortcut Keys from the menu bar or see the [Appendix C: Shortcut Keys](#).

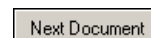
For example, to open the File menu, press **ALT+F**.



### Button

**A graphic element located on a window that performs a specific function when activated.**

For example, when starting and selecting the county, tab to the **Next Document** button and press **Enter** to go directly to the next document in the queue.



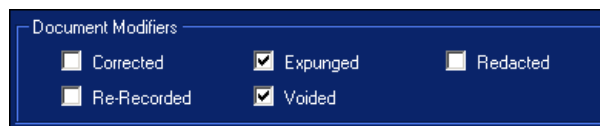
### Check box

**Interactive boxes you select or clear to turn options on or off.**

For example, if a document contains the word “Voided,” the operator selects the “Voided” check box from the Document Modifiers section of the container group.

When you select a check box, a check mark is displayed in the box. When you de-select a check box, the check mark is removed.

To select or deselect a check box, press the **space bar**.



**Note:** Some check boxes automatically add and move the cursor’s focus to the relevant container group when selected.

**Container group** The main heading used for one or more containers and associated data fields.

---

**CTRL key** **The CTRL key can be used in combination with other keys to perform shortcuts for specific functions.**

Press the **CTRL** key together with the specified character key. For a list of shortcut key commands, select **Help > Shortcut Keys** from the menu bar or see the [Appendix C: Shortcut Keys](#) section.

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**Dialog box** **A window containing buttons and options used to carry out a particular command or task.**

The DCI window allows you to enter information by typing in the boxes, clicking buttons, or selecting options and check boxes.

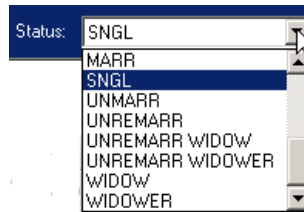
---

**Data field** Any field or space on the Data Entry panel for entering information.

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**List box** **A text box with an attached list.**

The DCI list boxes allow you to enter the first letter of a selection or use the Up and Down arrows to navigate through the list.

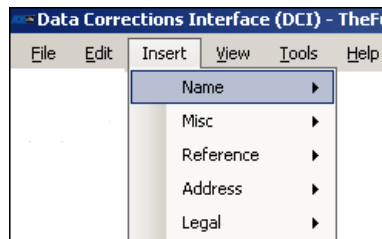


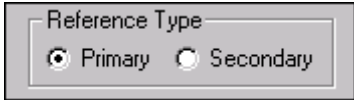
To select an item from the list box, type the first character or digit to display the first match. If there are additional items that begin with the same character or digit, press the **DOWN ARROW** key to navigate through the box to the correct item.

---

**Menu bar** **A row of menu options displayed across the top of a window.**

Open a drop-down list of menu commands by using shortcut keys. For example, to open the Insert menu, press **ALT+I**.



<b>Option button</b>	<p><b>Also known as a radio button. Two or more round buttons you can use to select one option.</b></p> <p>You can select only one option button at a time. Generally, one of the options will be set as the default option.</p> <p>For example, in the Post Same As Reference window, the Primary option button is the default.</p>
	
	<p>To select an option button, tab to the option button you want, then press the appropriate <b>ARROW</b> key (<b>UP, DOWN, LEFT OR RIGHT</b>) to select the desired option button.</p>
<b>Pane</b>	<hr/> <p>The separate areas of a window. For example, the DCI contains four panes: Navigation, Workspace, Browser, and Notification. For a detailed description of these panes, see the <a href="#">Basic DCI Features</a> section.</p>
<b>Panel</b>	<hr/> <p>The separate areas of a pane. For example, the Navigation pane has two panels: the Data Entry panel and the Queue Manager panel. For a more detailed description of these panels, see the <a href="#">Basic DCI Features</a> section.</p>
<b>Scroll bar</b>	<hr/> <p><b>A box or bar located on the side of a window or pane that you can move up or down to change your position on the window.</b></p> <p>For example, you can use the scroll bar on the right side of the Data Entry panel to view boxes that do not fit on your screen.</p> <p>To use the scroll bar, click it with the mouse to select it, then press the <b>UP</b> or <b>DOWN ARROW</b> keys to move up or down.</p>
<b>SHIFT+TAB</b>	<hr/> <p><b>Press SHIFT+TAB to move the cursor to the previous box or button on a window.</b></p> <p>When your cursor is in a specific box or window, the box or window is enabled. Also referred to as Back-Tab.</p>
<b>Shortcut key(s)</b>	<hr/> <p><b>A key or combination of keys that perform a command without clicking the mouse button.</b></p> <p>For example, to zoom in on an image in the Workspace pane, press <b>CTRL+Z</b>.</p>

**TAB key**

**Press the TAB key to move your cursor to the next available field or button on a window.**

When your cursor is in a field or window, the field or window is enabled.

## Appendix B: Glossary

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This appendix defines various Data Center terms used throughout the DCI and when entering documents.

### **1st Party**

The person(s) or business initiating an action on a document. For example, on a deed, the grantor gives away the ownership of a piece of property; on a mortgage, a mortgagor gives an encumbrance on a piece of property to receive a loan or mortgage.

### **2nd Party**

The recipient of an action created by a document. For example, a grantee is the recipient on a deed; a mortgagee is the recipient of an encumbrance on a property.

### **Automated Data Entry (ADE)**

A project focused to re-engineer The Fund's end-to-end data entry process and tools as necessary in order to reduce the time and cost to enter and certify public record data into the title plant.

### **Automated Document Retrieval System (ADRS)**

A document image storage and retrieval system that contains document images as received from the counties.

### **Automated Title Information Data System (ATIDS)**

The Fund's computer system and the information it contains. ATIDS is Florida's largest title computer database, allowing our customers to have instant access to title information. ATIDS can virtually convert a subscriber's office into a title facility with the ability to perform an immediate title search. Rather than having to travel to county courthouses and do manual research, our agents can conduct an immediate search of county records without leaving their offices.

### **Conventional (CONV)**

The mortgage type used when no other mortgage type is applicable.

### **Clerk Number (CN)**

A source code used in ATIDS.

### **Data Correction Interface (DCI)**

Data Correction Interface is the user interface used by ADE for data entry.

### **Data Validation**

The process of determining if the quality of a specific data element meets the expected content given appropriate edits and formatting.

### **Data Verification**

The process of evaluating the completeness, correctness, and conformance/compliance of a specific data element or data set against the business, procedural, or contractual requirements.

### **Date of File (DOF)**

The month, day, and year a document was filed in the public records.

### **Date of Instrument (DOI)**

The month, day, and year the document was executed.

### **General Index (GI)**

An ATIDS file that contains documents/entries indexed by name. These are documents that may affect a person's obligation or right to convey property, but do not affect a specific piece of property.

### **Instrument**

A legal document.

### **Intelligent Title Plant (ITP)**

A project designed to update the Title Plant to support the Fund's goal of providing a highly functional examination product to the end user.

### **Mortgage Identification Number (MIN)**

The Mortgage Identification Number assigned by MERS.

### **Mortgage Electronic Registration Systems, Inc. (MERS)**

A company that registers and tracks mortgages and mortgage related documentation.

### **Optical Character Recognition (OCR)**

A type of computer software used by the ADE system to translate document images of handwritten or typewritten text into text that can be edited.

### **Official Records (OR)**

A source code used in ATIDS. For title purposes, Official Records pertain to the set of index books as defined by the legislature, which the Clerk of Circuit Court must maintain, and which takes the place of deed books, mortgage books, etc., so that one set of books simplifies the records.

### **Property Index (PI)**

An ATIDS file that contains documents/entries indexed by property. These are documents that directly affect property.

**Primary Reference (PR)**

The number taken from the county stamp on a document. In most cases, it consists of a book number (up to seven digits, including a hyphen and a suffix) and a page number (up to nine digits including a hyphen and a suffix).

**Reference or Reference Number**

Sometimes used interchangeably. Represents the location of Official Records documents (book and page number) or a clerk number stamped on the document by the county agency.

**Secondary Reference (SR)**

The number taken from the county stamp on a document. In most cases, it consists of a source code, a four-digit year and a number (up to nine digits).



## Appendix C: Shortcut Keys

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Use this table as a quick reference to the DCI shortcut keys. A list of shortcut keys is also available from the Help menu.

<b>Data Entry Panel Commands</b>	
<b>To do this:</b>	<b>Press:</b>
Add all containers required to make document template a PI document template	CTRL+P
Add cent sign	CTRL+4
Add Commercial Name	ALT+C
Add Legal Sub Condo container group	CTRL+L
Add Personal Name	ALT+P
Add posting row	CTRL+TAB
Add Primary Reference	ALT+R
Add Secondary Reference	ALT+S
Add word “None” to field	F7
Clear all contents within a container	ALT+DELETE
Copy	CTRL+C
Delete a container	CTRL+D
Delete a container group	CTRL+DELETE
Dupe all required fields within a container	CTRL+U
Get next document	CTRL+N
Post Only	CTRL+O
Paste	CTRL+V
Post Same As (PSA) a previously recorded document	CTRL+J
Retrieve Source of Plat	CTRL+R
Swap 1st party and 2nd party names	SHIFT+CTRL+S
Switch name type	CTRL+W

<b>Data Entry Panel Navigation Commands</b>	
<b>To do this:</b>	<b>Press:</b>
Jump to previous container	CTRL+SHIFT+TAB
Jump to previous container group	CTRL+PAGE UP
Move to bottom of the Data Entry panel	ALT+CTRL+PAGE DOWN
Move to top of the Data Entry panel	ALT+CTRL+PAGE UP
Skip to next container	CTRL+ALT+TAB
Skip to next container group	CTRL+PAGE DOWN
<b>Data Entry Panel View Commands</b>	
<b>To do this:</b>	<b>Press:</b>
Hide all container Views	SHIFT+CTRL+A
Hide current container	SHIFT+CTRL+H
Move current container down	CTRL+DOWN ARROW
Move current container up	CTRL+UP ARROW
Show all views	SHIFT+CTRL+V
Show current container	SHIFT+CTRL+C
<b>Document Image Navigation Commands</b>	
<b>To do this:</b>	<b>Press:</b>
Move to first page	CTRL+HOME
Move to last page	CTRL+END
Move to next page	ALT+PAGE DOWN
Move to previous page	ALT+PAGE UP
Scroll down on image	ALT+DOWN ARROW
Scroll left on image	ALT+LEFT ARROW
Scroll right on image	ALT+RIGHT ARROW
Scroll up on image	ALT+UP ARROW
Zoom in on image	CTRL+PLUS SIGN (+)
Zoom out on image	CTRL+MINUS SIGN (-)

<b>Menu Navigation Commands</b>	
<b>To do this:</b>	<b>Press:</b>
Display the File menu	ALT+F
Display the View menu	ALT+V
Display the Go menu	ALT+G
Display the Insert menu	ALT+I
Display the Tools menu	ALT+T
Display the Help menu	ALT+H
Exit the DCI	ALT+F, then X
<b>Miscellaneous Commands</b>	
<b>To do this:</b>	<b>Press:</b>
Switch to Data Entry panel from QueManager	CTRL+1
Switch to QueManager from Data Entry panel	CTRL+2
Hide the Navigation Pane	ALT+F1
Display the Shortcut Keys	CTRL+F1
Display the DCI User Guide (DCI Help)	F1

