

DEX User Guide

How DEX files are created

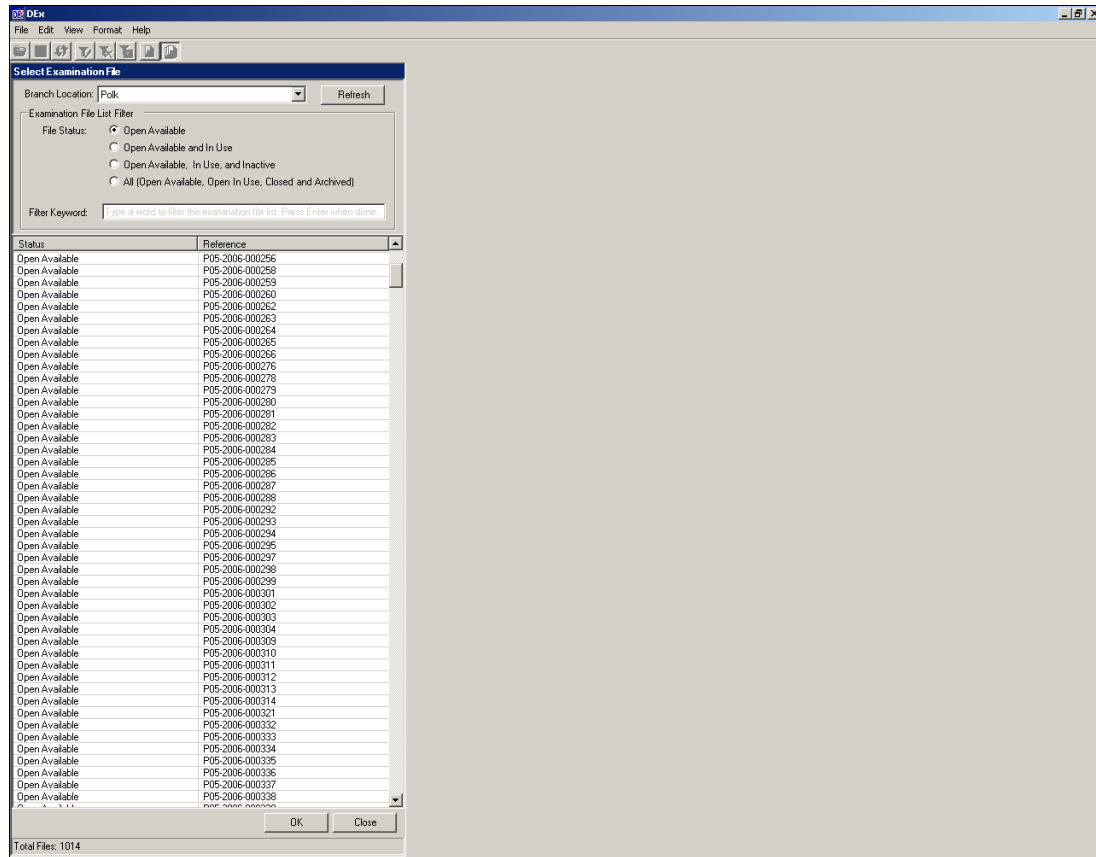
Order data is received at a branch and entered into WIP by an order specialist. The order is released and search results are sent to DEX. DEX accepts the search results and creates a DEX file. If additional searches are required for title examination, the DEX1 transaction can be used to add searches to a file.

Layout of the DEX window

The DEX window consists of a menu bar (File, Edit, View, etc.), one toolbar with various buttons, and several panes. The panes displayed depend on whether you are looking at a file overview or search details.

Initial DEX window

The window displayed when you first access DEX has one active pane, Select Examination File. From here, you can open a file to examine. An example is shown below.



Working with files

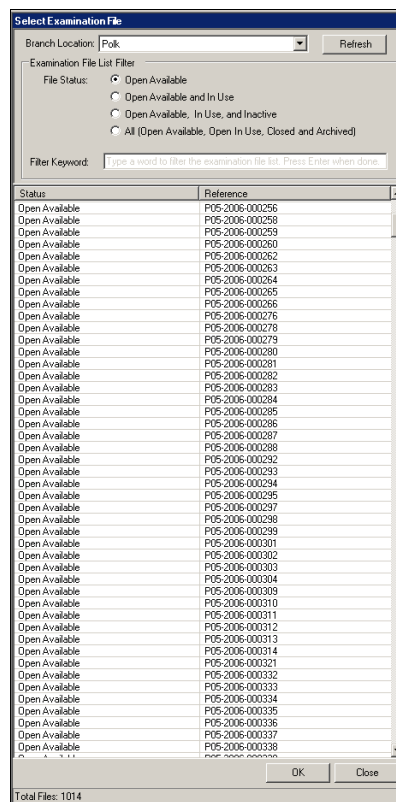
Open file

To open a file, access the Select Examination File pane. This pane is displayed when you first access DEx.

If you are working on a file and wish to open a different one, you must access the Select Examination File pane again. Do one of the following:

- Select **File**, then **Open**.
- Click the **Open File** button on the toolbar.

The Select Examination File pane is shown below.



Verify that the correct branch is displayed in the Branch Location box. Select a different branch if necessary.

1. File filters can be used to reduce the number of files displayed for selection. For example, using Open Available will show the fewest number of files, while using All will show all files in DEx. Select one of the following file filters under the Filter By Status section:
 - **Open Available**
 - **Open Available and in Use**
 - **Open Available, in Use, and Inactive**
 - **All (Open Available, Open in Use, Closed and Archived)**

2. Do one of the following:
 - Double-click the file. File information is displayed.
 - Click the file, then click the **OK** button. File information is displayed.
-

Keyword filter the displayed files

To reduce the number of files displayed for selection, type a whole or partial file name in the Filter Keyword field, and then press Enter. Only those files containing the character string you specify are displayed.

To go back to the full display, delete the data in the Filter Keyword field and press Enter.

Refresh the file display

Click the **Refresh** button to redisplay the latest files in DEx. This is useful when you are waiting for a file that you know has been sent.

Close/open the file display

Click the **Close** button to close the Select Examination File pane. To open the file display back up, do one of the following:

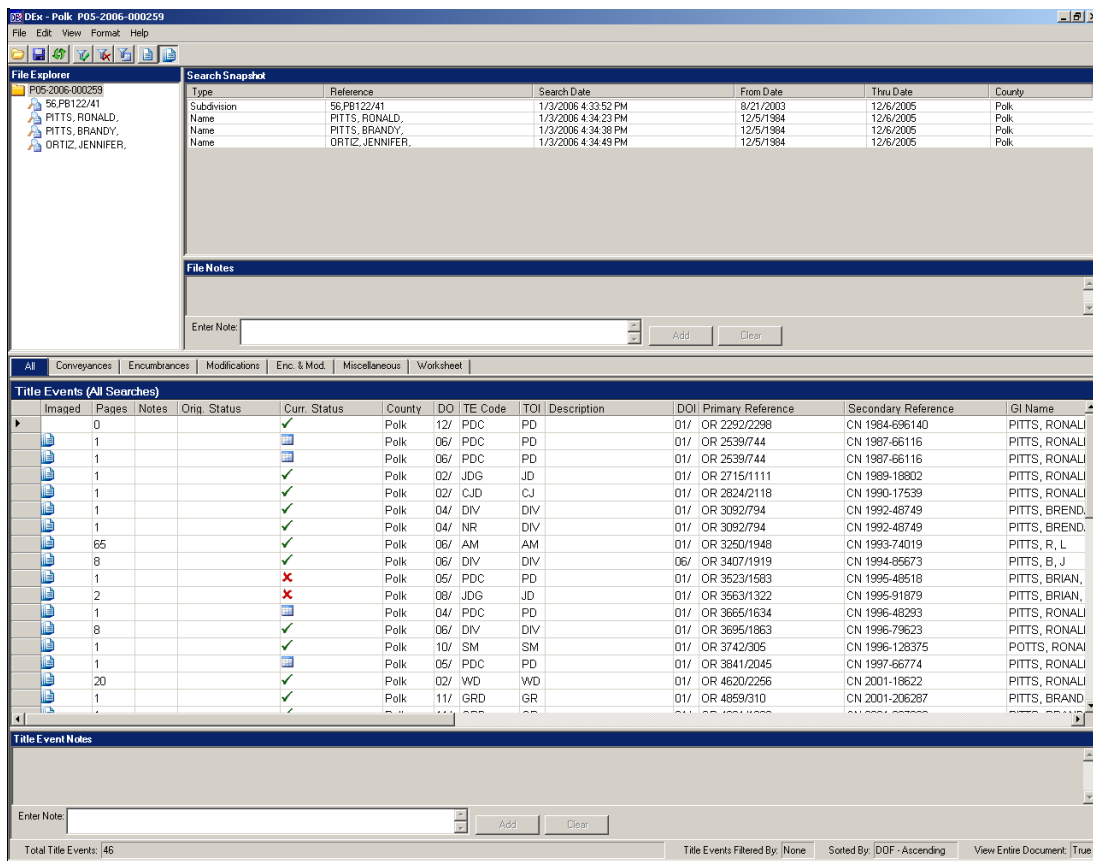
- Click the **Open File** button on the toolbar.
- Select **File**, then **Open**.

File view window

After you open a file, the following panes are displayed:

- **File Explorer** displays the file name and related searches.
- **Search Snapshot** displays a brief summary of the searches related to the file and some search parameters.
- **File Notes** displays any notes added at the file level.
- **Title Events** displays returned documents found in all of the related searches.
- **Title Event Notes** displays any notes added at the title event level.

An example is shown below.

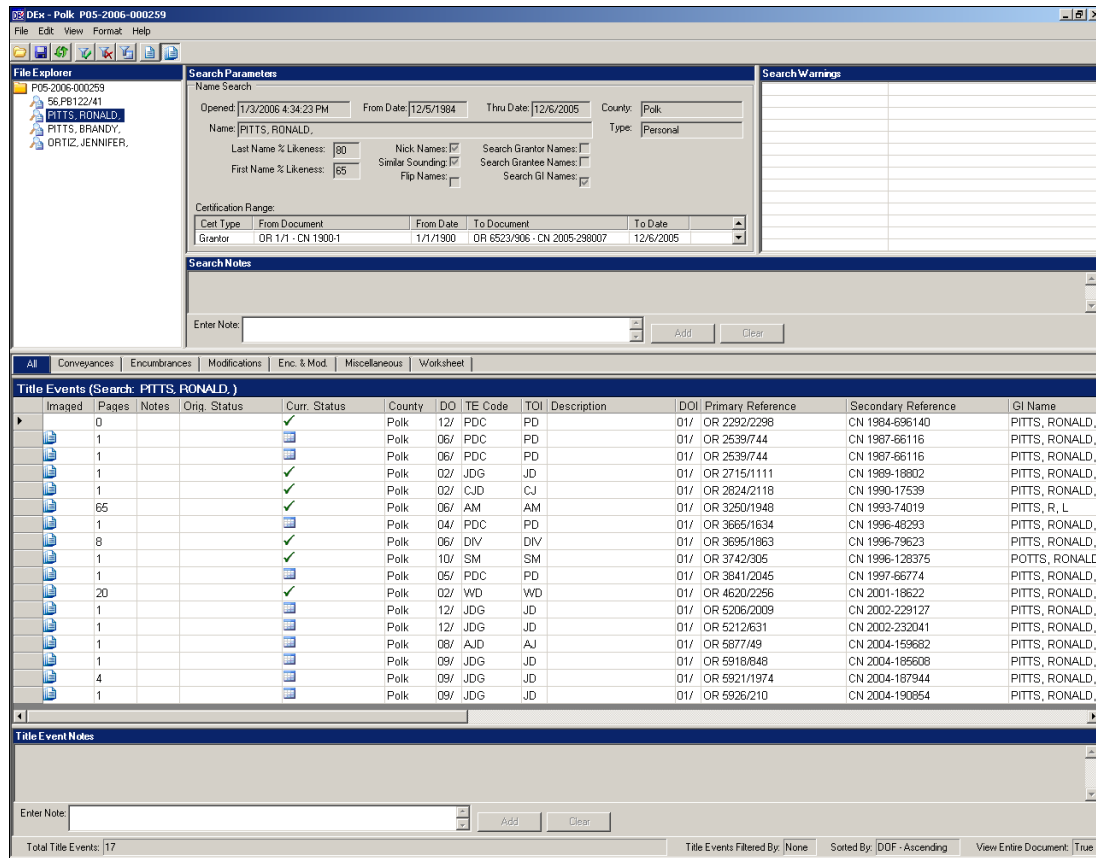


Search details window

After you click on a search under the File Explorer pane, the following panes are displayed:

- **Search Parameters** displays the data used in the search.
- **Search Warnings** displays any warnings regarding the search. For example, you may be instructed to call Legal at Fund Headquarters.
- **Search Notes** displays any notes added at the search level.
- **Title Events** displays the title events that apply to the search. Title events are defined in the *Working with title events* section.
- **Title Event Notes** displays any notes added at the title event level.

An example is shown below.



Change pane dimensions

You can change the dimensions of any pane on your screen. Click and hold the edge of a pane and drag it to the desired position, then release the mouse button.

Working with title events

Documents returned as search results may represent more than one event that impacts the chain of title. For example, a TOI such as WDM (Warranty Deed Mortgage) represents both a deed and a mortgage. To allow for separate examination statuses in these situations, DEx creates separate title events. For a WDM, there would be separate title events listed for the deed and mortgage.

Documents with multiple name-level TOIs in addition to the document-level TOI are represented by multiple title events. Example: A DIV (Divorce) document includes a name restoration for one of the parties. The document-level TOI is DIV, but there is also a name-level TOI of NR (Name Restoration) for one of the parties.

DEx also creates title events for Red Alert and Patriot Name warnings. This makes it easy to see that special action must be taken.

You can modify many things about the way data is displayed in the Title Events pane. Any changes you make (except increased row height) are saved from session to session, as long as you access DEx on the same PC where you made changes.

- Change the display to full screen.
- Increase row height.
- Increase/decrease text size.
- Adjust column width.
- Move columns.
- Turn column display on/off.
- Change the sort order.
- View title event details.

Change the display to full screen

Do one of the following:

- Double-click the Title Events title bar. (Repeat this action to return to the previous view.)
 - Select **View**, then **Search Information**. (Repeat this action to return to the previous view.)
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Increase row height

You can increase the space below the text in the rows under Title Events. Do one of the following:

- Right-click the Title Events pane, select **Title Event View**, and then select **Expanded Row Height**. (Repeat this action to return to the previous view.)
- Select **Format**, then **Title Event View**, and then **Expanded Row Height**. (Repeat this action to return to the previous view.)

The increase applies to all of the tabs under Title Events, including Worksheet.

**Increase/
decrease text
size**

You can increase or decrease the size of the text in the rows under Title Events. Do one of the following:

- Right-click the Title Events pane, select **Text Size**, and then select one of the following: **Smallest**, **Smaller**, **Medium**, **Larger**, or **Largest**.
- Select **View**, then **Text Size**, and then select one of the following: **Smallest**, **Smaller**, **Medium**, **Larger**, or **Largest**.

The increase or decrease applies to all of the tabs under Title Events, including Worksheet.

**Adjust column
width**

You can adjust the width of the columns displayed under Title Events. Move the cursor over the edge of a column heading until you see a double vertical bar with left and right arrows. Click and hold the edge of the column heading, then drag it left or right to adjust the width.

The adjustments you make apply to all tabs except Worksheet. Any adjustments you make to the Worksheet tab will not apply to the other tabs.

Move columns

You can re-arrange the columns displayed under Title Events by moving them around. Click and hold the middle of a column heading, then drag it left or right to the desired position. Release the mouse button.

The adjustments you make apply to all tabs except Worksheet. Any adjustments you make to the Worksheet tab will not apply to the other tabs.

**Turn column
display on/off**

You can modify which columns are displayed under Title Events. Do the following:

- Right-click any column heading under Title Events. A pop-up window displays the list of column names sorted alphabetically. A checkmark displayed to the left of the name indicates the column is currently displayed.
- To turn off a column display, click the name of the column. The checkmark is no longer displayed. To turn on a column display, click the name of the column again.

The adjustments you make apply to all tabs except Worksheet. Any adjustments you make to the Worksheet tab will not apply to the other tabs.

Change the sort order

Documents returned under Title Events are displayed in ascending order according to the DOFs as a default setting. To change the order, click any of the column headings under Title Events; the order will change from ascending to descending or vice versa based on the data in the selected column.

This works on any tab except Worksheet.

There is a Sorted By field at the bottom of the screen that shows how data is currently sorted.

View title event details

You can view title event details in a pop-up window, where details are displayed in a portrait format.

Do one of the following to view title event details:

- Double-click any column of the title event except the Image column.
- Right-click the title event, then select **Title Event Details**.
- Click the title event. Select **View**, then **Title Event Details**.

Viewing documents in files

You can set the default to view all pages of a document or only the first and last pages. *For faster results, view first and last pages only.*

Set document display default

You can set the default between viewing all pages and viewing only the first and last pages by doing one of the following:

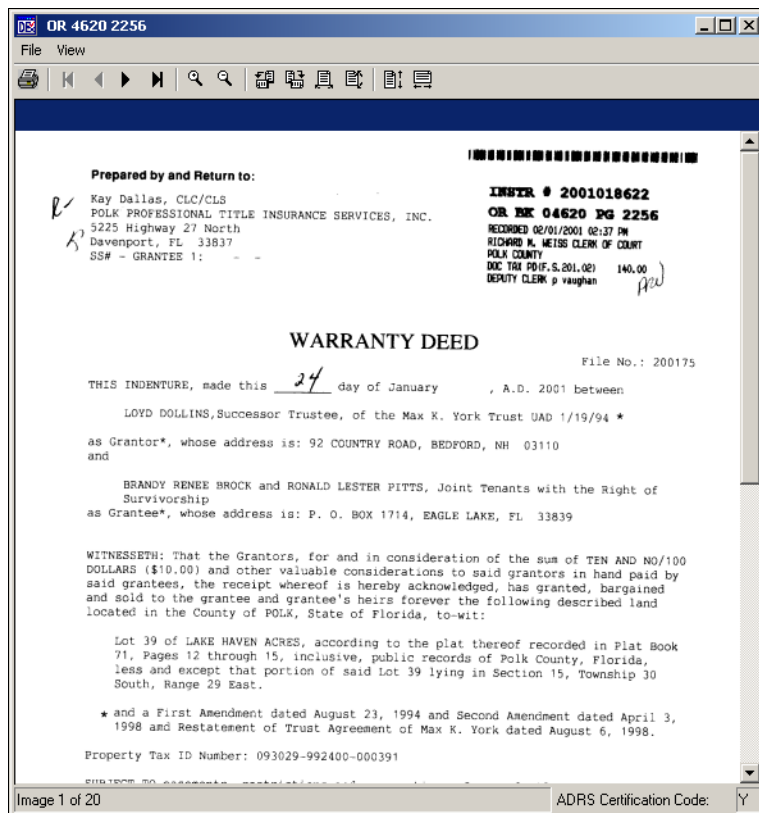
- Click either the **View First And Last Page** or **View Entire Document** button on the toolbar.
- Select **View**, then **Document Option**, and then either **First And Last Page** or **Entire Document**.

After you set the default, look at the bottom right of the screen. You will see either **View Entire Document: True** or **View Entire Document: False**.

View a document Do one of the following:

- Double-click the document icon in the Image column. The document display setting in the bottom right corner of the screen indicates whether you see all pages or only the first and last pages.
- Right-click the document and select **View Entire Document** or **View First and Last Page**. The available selection is the opposite of the document display setting.

The document you selected is displayed in a window like the one shown below.



Print a document Select **File**, then **Print**, and then select one of the following:

- **Print All**
- **Print Current Page**
- **Print First And Last Page**

Switch between view modes If you choose to view all pages, you can switch to viewing only the first and last page, and vice versa. Select **View**, then select either **Entire Document** or **First and Last Page**.

Adjusting the view of documents

You can page through, 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:

- To increase magnification, click the **Zoom In** button.
- To decrease magnification, click the **Zoom Out** button.

For greater magnification, press the *Zoom* button multiple times.

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.
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Flip document horizontal/ vertical

Do one of the following:

- To flip the document horizontally, click the **Flip Horizontal** button. This is the same as rotating the document 180 degrees.
 - To flip the document vertically, click the **Flip Vertical** button. This turns over the document and gives you a reverse image.
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Fit document to height/width

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.

Assigning status to documents

You can assign any of the following statuses to a document:

- No Status - Use to remove the status from a document.
- Cleared by Examiner - Select this status if the document applies to the subject of the search, but is not required for the final product.
- Electronic Worksheet - Select this status to assign the document to the electronic worksheet. This is for documents required for the final product.
- Excluded by Examiner - Select this status if the document does not apply to the subject of the search.

Assign status

1. Right-click the document.
2. Select one of the following:
 - **No Status**
 - **Cleared by Examiner**
 - **Electronic Worksheet**
 - **Excluded by Examiner**

The appropriate icon is displayed in the Cur. Status column or the existing icon is removed.

Filter documents by status

You can display documents according to the status assigned to them.

Click one of the following icons on the toolbar:

- **Filter By Cleared By Examiner**
- **Filter By Worksheet**
- **Filter By Excluded by Examiner**

There is a Title Events Filtered By field at the bottom of the screen that shows the filter being used.

Save changes

Click the **Save** button on the toolbar. Or select **File**, then **Save**.

Marking title events viewed/not viewed

After you view a document by double-clicking the document icon in the Image column, a red check mark icon is displayed on top of the document icon. The red check mark is also displayed on all other title events with the same primary or secondary reference to indicate that the title event has been viewed. You can remove the check mark to show that the title event (and title events with the same primary or secondary reference) has not been viewed. You can also mark title events as viewed without actually viewing the document in the Image column.

Any changes you make are saved from session to session, as long as you access DEx on the same PC where you made changes.

Mark title event as not viewed

Do one of the following:

- Right-click the title event, then select **Mark Title Event As Not Viewed**.
- Click the title event, select **Edit**, and then select **Mark Title Event As Not Viewed**.

The red check mark icon is removed from the document icon on the selected title event. It is also removed from any title events with the same primary or secondary reference.

Mark title event as viewed

Do one of the following:

- Right-click the title event, then select **Mark Title Event As Viewed**.
- Click the title event, select **Edit**, and then select **Mark Title Event As Viewed**.

The red check mark icon is displayed on the document icon on the selected title event. It is also displayed on any title events with the same primary or secondary reference.

Adding notes

You can add notes to files (file notes), searches (search notes), and title events (title event notes). These notes will only be displayed in DEx.

Add note to file

1. Click the file under the File Explorer pane.
 2. Type the note in the **Enter Note** field under the File Notes pane.
 3. Click the **Add** button. The note is displayed at the top of the File Notes pane.
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Add note to search

1. Click the search under the File Explorer pane.
 2. Type the note in the Enter Note field under the Search Notes pane.
 3. Click the **Add** button. The note is displayed at the top of the Search Notes pane and a Note icon is displayed to the left of the search under the File Explorer pane.
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Add note to title event

1. Click the title event under the Title Events pane.
 2. Type the note in the Enter Note field under the Title Event Notes pane.
 3. Click the **Add** button. The note is displayed at the top of the Title Event Notes pane and a Note icon is displayed in the Notes column.
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Display existing note

Click any title event that has a Note icon displayed in the Notes column to see the note that has been added.

Saved notes

Once you save a note, it cannot be deleted.

Working with the electronic worksheet

After you have completed examining the title events in a file, click the Worksheet tab. All of the title events for the product are gathered in the Worksheet, which works in a fashion similar to the Manual Change Sheet. You can change the order of the title events and then send them to ProPel. All of the work you perform in the Worksheet is automatically saved with the file.

Change title event order

Click the title event you want to move on the gray box to the far left of the Title Events pane. Hold down the mouse button and move the title event up or down until it is in the desired position. Release the mouse button.

The title events are sent to ProPel in the same order they are listed.

Move columns

You can re-arrange the columns displayed under the Worksheet by moving them around. Click and hold the middle of a column heading, then drag it left or right to the desired position. Release the mouse button.

Any adjustments you make to the Worksheet tab will not apply to the other tabs.

Send title events to ProPel

1. Right-click all of the title events you want to send to ProPel. (You can select multiple title events. In general, you will select all of the title events.)
2. Select **Send to**, then **ProPel**. The title events are sent to ProPel.