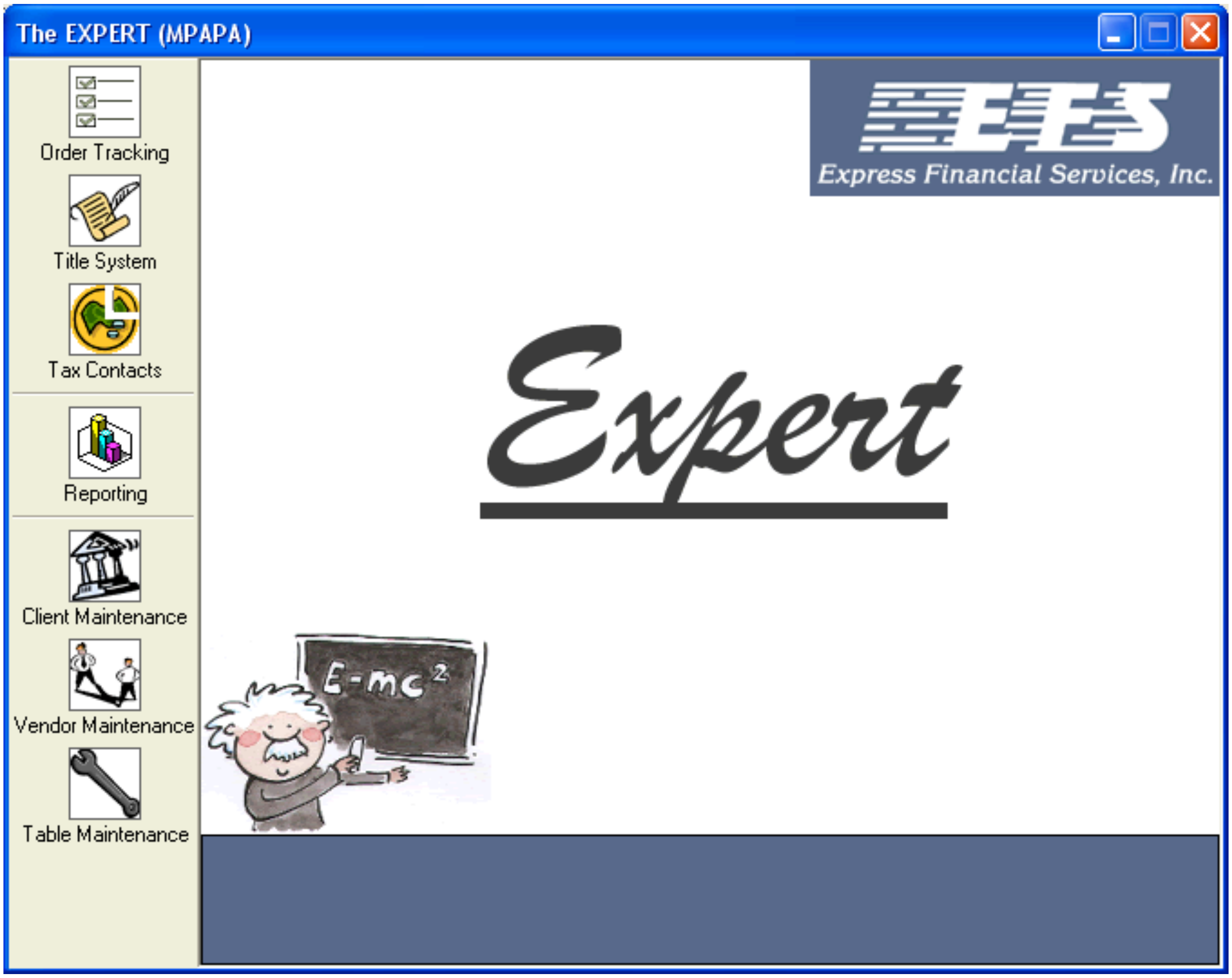


User Guide

Volume Three

Table Maintenance

© 2005 Y-Waite Solutions, LLC

Table of Contents

List of Figures

List of Tables

1 General Information

1.1 Introduction

This manual for the EXPERT system describes the functions that are available in the Table Maintenance module. Table Maintenance is where many default values, system behaviors, and user privileges are set.

1.2 Terms to Know

The following table defines terms that are used throughout this manual.

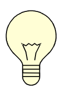
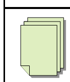
Table 1-1: Common Terms Used in This Manual

Term	Definition
Button	A button is a picture or word you can click on that will perform a certain function, such as saving data, going to a new screen, etc.
Checkbox	A checkbox is a small square box that will alternate between being checked or empty when you click on it.
Icon	Icon is another word for a button that contains a picture rather than text.
Data field	This term refers to any place in the EXPERT program where you can enter information, including search functions.
Default, by default	Many places in the EXPERT system use dropdown menus to present a fixed set of options to the users. In the Table Maintenance utilities, you can set the most-often-used options to appear automatically, or by default, in order to save users time and typing.
Double-click	This term means to press down twice on the left button on the mouse in rapid succession. This action is mainly used to open files and folders on the computer.
Dropdown, dropdown list, or dropdown menu	These three terms all refer to places in the EXPERT program where you can choose information from a pre-selected list, rather than typing it in. A field contains a dropdown menu if there is a small, downward-pointing arrow icon at the end of the data field.
Radio button	A radio button is a small circle that will alternate between being empty or filled in when you click on it. Usually, radio buttons will come in sets of two or more choices, and exactly one choice must be selected.
Right-click	Pressing down on the right mouse button will typically bring up a list of operations you can perform to a file, field, or document. This can be a time-saver. (Most mouse operations use the left button.)
Screen	The screen refers to everything you can see in a particular EXPERT view; it is what appears when you open the EXPERT system or click on a button or a tab. A single EXPERT screen may contain multiple windows (see Window entry in this table).
Scroll bar, scrolling	There are a few places in the EXPERT system where information relevant to a particular screen cannot all be seen on the screen at the same time. Many of these screens will have scroll bars on the right side of the screen which will allow you to move up and down through information by clicking on arrows at the top and bottom of the scroll bar.
Window	Many of the views you will see while working with the EXPERT system contain multiple areas that each have a different heading. Each area is called a window, and there can be more than one window on a screen (see Screen entry in this table).

1.3 Conventions & Graphic Notations Used in this Manual

The following table defines several text formatting conventions and graphics that are used throughout this manual. These formats and graphics should help you quickly identify key pieces of information.

Table 1-2: Formatting Conventions and Graphics Used in This Manual

Convention/Graphic	**Meaning**
Bold Title Case text	Identifies a button on the screen that you can click.
ITALIC CAPITALS text	Identifies operating system or EXPERT application menus; found along the top of the screen or current window.
Regular Title Case text	Identifies the names of the screens and windows used throughout the EXPERT system.
Italic Title Case text	Identifies dropdown menu, checkbox, or radio button names on data entry screens.
Underline Plain text	Identifies other sections of this documentation that may be helpful to a specific topic.
1.2.3 or 2.5 or 5.1.3.4	A sequence of numbers with periods in between them refers to sections of the documentation. For example, this table is in section 1.3.
1-1 or 4-17 or 10-3	Two numbers with a dash in between them refers to a table or figure number. The number before the dash indicates the main section of documentation where the table or figure is located. For example, this table is Table 1-2, which means it is the second table in section 1 of the documentation (General Information).
	Timesaver Tip graphic – alerts you to a keystroke or data entry shortcut. Timesaver tips are usually listed immediately after the action they pertain to.
	Alert graphic – alerts you to important facts about how the system behaves. Heeding these alerts will help you avoid some headaches. Alerts are usually listed immediately after the action they pertain to.
	Note graphic – alerts you to useful information about how the system behaves. Notes are usually listed immediately after the action they pertain to.

1.4 Timesaver Tips

The following table identifies several features of the EXPERT system which can save you time and keystrokes.

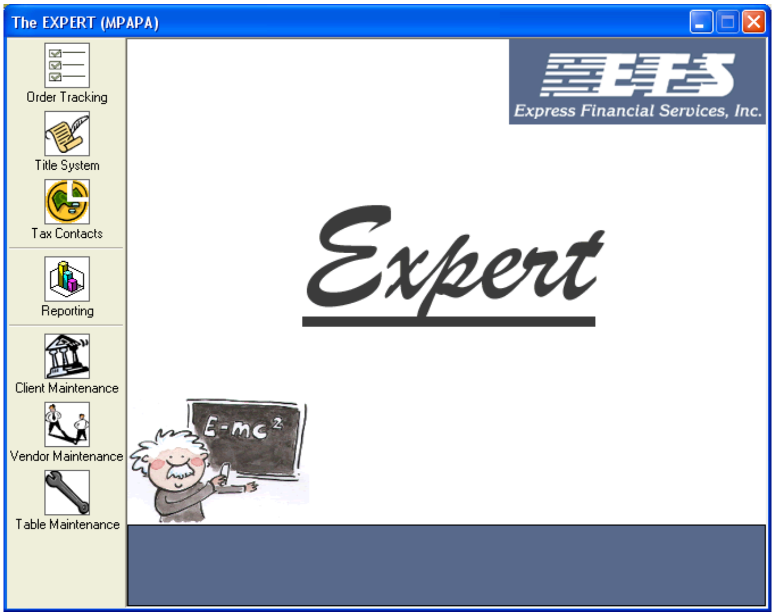
Table 1-3: Time-Saving Features of the EXPERT System

Function	**Timesaving Action**
Right-clicking for Field ID Names	In several of the Table Maintenance utilities (and throughout the remainder of the EXPERT modules), there are dropdown menus whose content you may not change in that module. If you need to change the content of a dropdown menu, right-click on the menu. If a small window called Field ID appears, it will identify the field ID of the menu you clicked on. You may change the contents of that menu by editing the corresponding Field ID in the Combo Box Maintenance utility.
Tabbing between Fields	When entering data, you may hit the Tab key on your keyboard to move the cursor from one data field to the next. If you hold down your Shift key and then hit the Tab key, the cursor will move to the previous field.

1.5 Overview of Opening Screen

When you open the EXPERT program, you will see the screen shown in Figure 1-1.

Figure 1-1: EXPERT Opening Screen



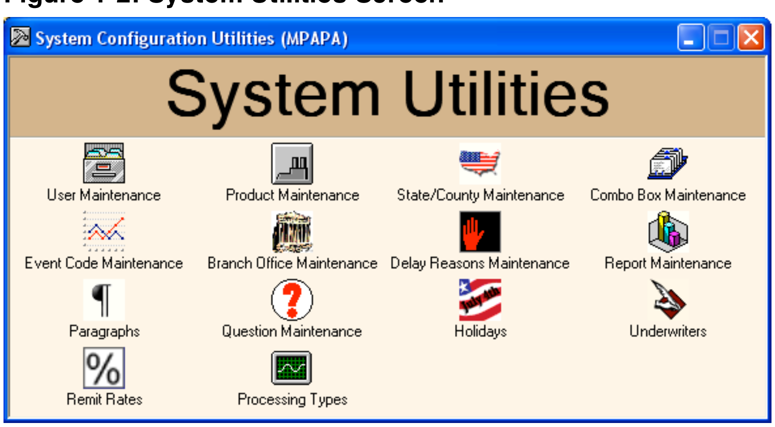
From this screen, you can choose various options by clicking on the appropriate button on the left side of the window. This manual addresses the following choice:

Table maintenance

1.6 Overview of Table Maintenance Areas

When you click on the Table Maintenance button on the EXPERT opening screen, the screen in Figure 1-2 will appear.

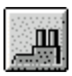
Figure 1-2: System Utilities Screen



From this screen, you may choose any of 14 different utilities. This manual documents 12 of those choices, which are summarized in the table below.

The functionality of some of these utilities depends upon values being entered in other utilities first. See Appendix 1 for a list of the functions that need to be performed in a specific order.

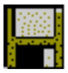
Table 1-4: Description of Buttons on System Utilities Screen

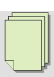
Button icon	Button name	Maintenance area
	User Maintenance	Allows you to define users and set their privileges for different branch offices and EXPERT modules.
	Product Maintenance	Allows you to define products and set default product fees.
	State/County Maintenance	Allows you to set default branch, license, and recording fee information for each state and its counties.
	Combo Box Maintenance	Allows you to define the options that appear in many of the dropdown menus throughout the EXPERT modules.
	Event Code Maintenance	Allows you to define events, set up task lists, and set conditions for automatic completion and delay of events.
	Branch Office Maintenance	Allows you to enter information about your company's branch office locations.
	Delay Reasons Maintenance	Allows you to define and categorize reasons for event delays that appear in the various process tracking screens.
	Paragraphs	Allows you to compose and categorize segments of standard legal text that appear in a variety of legal documents.
	Question Maintenance	Allows you to compose and categorize the questions that are asked as part of a vesting review.
	Holidays	Allows you to define holidays that would affect appraisal, title, and closing functions and appointments.
	Underwriters	Allows you to enter profiles of underwriters.
	Processing Types	Allows you to define different servicing processes.

1.7 Overview of Table Maintenance Toolbar

The different Table Maintenance screens all have a toolbar, containing a variety of icon buttons, in the upper-left corner of each screen. The following table identifies and describes all the icon buttons that you may see on the Table Maintenance screens.

Table 1-5: Description of Buttons Appearing in the Table Maintenance System

Button icon	Button name	Button function
	Create New Entry	Allows you to create a new entry. Whether you get a menu selection or data fields to edit is determined by the current screen.
	Edit Current Entry	Allows you to edit a current entry.
	Save Changes	Saves any changes you just made to a specific screen. Only available when editing an entry.
	Copy	Copies some information from main address/contact information into current entry. Only available when editing an entry.  Clicking this button while editing a record may replace existing information.
	Undo Current Changes	Reverses any changes you just made to a specific screen. Only available when editing an entry.
	Delete Current Entry	Deletes whatever item/entry you have selected. Asks for confirmation before deleting the item.
	Print Preview	Shows you what the printed report or form will look like.
	Print Current Entry	Prints the current screen.
	Refresh the Screen	Checks the main database for any information that may have been recently changed by others.



*To enter or change information on any screen within the Table Maintenance system, you must click on either the **Create New Entry** or **Edit Current Entry** button. When you have completed your changes, you must click on either the **Save Changes** or **Undo Current Changes** button in order switch to another screen.*

1.8 Quick Guide to Defining Branch Offices, Users, and Teams

While all the utilities documented in this manual are necessary for configuring the EXPERT system, there are certain steps that are required to set up a new branch and define teams. The table below summarizes these steps. Each step is treated in more detail in the utility-specific sections of the manual.

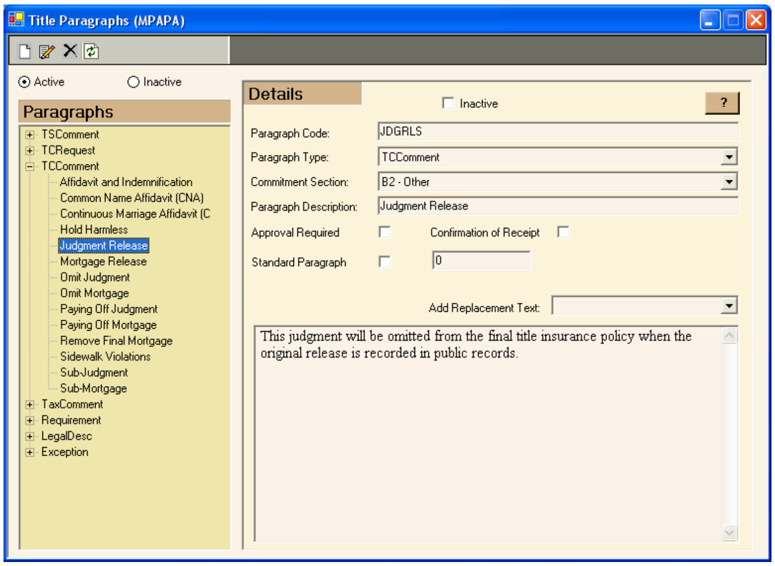
Table 1-6: Summary of Steps for Defining Branch Offices, Users, and Teams

Step	Action	Utility	Reasoning
1	Define branch offices	Branch Office Maint.	
2	Define users	User Maint.	Users must be assigned to one or more specific branches
3	Define servicing processes	Processing Types	
4	Assign servicing processes by state or by client	Branch Office Maint. – Servicing tab	Must define servicing processes before choosing how they are assigned
5	Define teams and assign them to servicing processes	Branch Office Maint. – Teams tab	Teams must be assigned to a branch and a servicing process
6	Assign teams by branch to states	State/Count Maint. – Branch Profile tab	Choices are dependent on branch office, servicing process, and previously-defined teams

9 Paragraphs

The Paragraphs utility allows you to manage the standard paragraphs that are used throughout the EXPERT system and appear in various legal documents. The **Paragraphs** button on the System Utilities screen (Figure 1-2, previously shown) will take you to the Paragraphs screen, shown in Figure 9-1.

Figure 9-1: Paragraphs Screen



There are seven categories of paragraphs listed in the Paragraphs window. The table below identifies where these various categories appear in the EXPERT system.

Table 9-1: Locations of Standard Paragraphs in EXPERT System

Paragraph Category	Location of Paragraph Category in EXPERT System
TSComment	Title System - Main screen - **Comments** sub-tab on the **Main**, **Taxes**, **Deeds**, **Mtgs**, and **Liens** tabs
TCRequest	Title System - Title Clearance screen - **Requests** tab
TCComment	Title System - Title Clearance screen - **Details** tab
TaxComment	Title System - Tax Manager screen
Requirement	Title System - Main screen - **Reqs** tab
LegalDesc	Title System - Main screen - **Legal** tab
Exception	Title System - Main screen - **Excepts** tab

9.1 Creating a New Paragraph

You may add new paragraphs to the existing categories of paragraphs shown in the Paragraphs window. You may not add a new paragraph category. Requirement and exception paragraphs have some features which the other types of paragraphs listed in Table 9-1 do not have, and so are discussed separately.

9.1.1 Creating a New Requirement or Exception Paragraph

1. Click on the **Create New Entry** button. The fields in the Details window will become editable.
2. Enter a *Paragraph Code*. The paragraph code can have a maximum of eight characters and should not include any spaces or punctuation.
3. Select either Requirement or Exception from the *Paragraph Type* dropdown menu.
4. Select the location where you want the text to appear from the *Commitment Section* dropdown menu.
5. Enter the *Paragraph Description*. This text will appear as an option in the dropdown menu for the chosen paragraph category.
6. For Requirement paragraphs only, check the *Approval Required* and/or *Confirmation of Receipt* checkboxes if you want to ensure the requirement is met prior to completion of the title clearance process.

> *Checking* Approval Required *will require that an employee with management or legal status clear the requirement.*
>
> *Checking* Confirmation of Receipt *will require that data be entered to prove the requirement was met before it can be cleared.*

7. Check the *Standard Paragraph* checkbox if you want the paragraph to be included by default. A user can always remove it at a later point.
8. If you have checked the paragraph as standard, enter the sequence number of the paragraph in the field to the right of the *Standard Paragraph* checkbox.

> *The number entered into this field will determine the order the standard paragraphs appear in the Requirements/Exceptions list.*

9. Enter the paragraph text in the large blank field in the bottom half of the Details window. This text is what will appear in the legal document.
10. If you want to include any order-specific information in the paragraph, choose the appropriate fields from the *Add Replacement Text* dropdown menu.

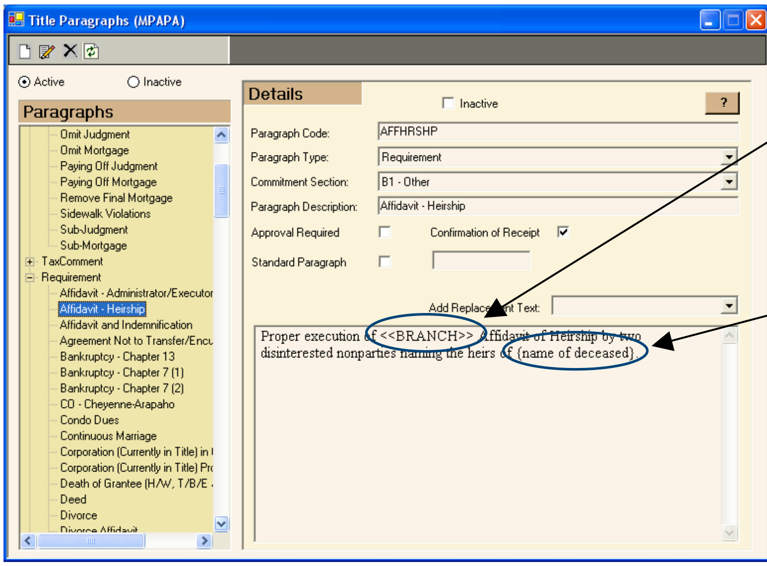
> *Replacement text is automatically replaced by the system with the specific data for each order. Replacement text is indicated in the paragraph text by double angle brackets (see Figure 9-2 for an example).*

> *To see a list of the different replacement text variables and where they are located in the system, click on the* ***question mark*** *button in the top-right corner of the Details window.*

11. Click on the **Save Changes** button, or click the **Undo Current Changes** button to cancel.

In addition to replacement text (field names that are automatically filled with data for a specific order), paragraphs can also contain placeholder text (data for an order that must be filled in by the employee). Replacement text is shown in upper-case and is bounded by double angle brackets. Placeholder text is bounded by curly brackets. Figure 9-2 shows an example of each.

Figure 9-2: Paragraphs Screen – Example of Replacement Text and Placeholder Text



Replacement text is shown in upper-case and bounded by angle brackets. You can select it from the *Replacement Text* dropdown menu, and it is automatically replaced by the system for each order.

Placeholder text is bounded by curly brackets. Where it appears, the actual data for the specific order must be entered by the employee.

9.1.2 Creating a New Paragraph (other than a Requirement or Exception)

1. Click on the **Create New Entry** button. The fields in the Details window will become editable.
2. Enter a *Paragraph Code*. The paragraph code can have a maximum of eight characters and should not include any spaces or punctuation.
3. Select the category of the new paragraph from the *Paragraph Type* dropdown menu.
4. Enter the *Paragraph Description*. This text will appear as an option in the dropdown menu for the chosen paragraph category.
5. Enter the paragraph text in the large blank field in the bottom half of the Details window. This text is what will appear on the legal document.
6. If you want to include any order-specific information in the paragraph, choose the appropriate fields from the *Add Replacement Text* dropdown menu.

Replacement text is automatically replaced by the system with the specific data for each order. Replacement text is indicated in the paragraph text by double angle brackets (see Figure 9-2 (previously shown) for an example).

*To see a list of the different replacement text variables and where they are located in the system, click on the **question mark** button in the top-right corner of the Details window.*

7. Click on the **Save Changes** button, or click the **Undo Current Changes** button to cancel.

In addition to replacement text (field names that are automatically filled with data for a specific order), paragraphs can also contain placeholder text (data for an order that must be filled in by the employee). Replacement text is shown in upper-case and is bounded by double angle brackets. Placeholder text is bounded by curly brackets. Figure 9-2 (previously shown) shows an example of each.

9.2 Editing a Paragraph

1. Select the paragraph you wish to edit from the Paragraphs window.
2. Click on the **Edit Current Entry** button.
3. Make any necessary changes. See the previous section, 9.1 Creating a New Paragraph, for more details on what the various fields represent.
4. Click on the **Save Changes** button, or click the **Undo Current Changes** button to cancel.

9.3 Deleting or Inactivating a Paragraph

You may delete or inactivate individual paragraphs shown in the Paragraphs window. You may not delete any of the paragraphs categories. Deleting a paragraph will remove it from the system entirely. Inactivating a paragraph will keep it listed in the Paragraphs utility, but will cause it to not appear on any of the dropdown menus throughout the other EXPERT modules.

9.3.1 Deleting a Paragraph

Deleting a paragraph will remove it from the system entirely. Requirements and Exceptions paragraphs which have been used in an order cannot be deleted.

1. Select the paragraph you wish to delete from the Paragraphs window.

Be sure that you have selected a paragraph, not a paragraph category, to delete from the Paragraphs window. Clicking the delete button with a paragraph category selected will not delete anything.

2. Click on the **Delete Current Entry** button.

You may not delete a paragraph from either the Requirements or Exceptions categories if the paragraph has already been used in an order. If you attempt to do so, you will see an error message. Instead, you may inactivate the paragraph (see the next section, 9.3.2 Inactivating a Paragraph for more information).

You can delete paragraphs in other categories, regardless of whether they have been used, without affecting existing orders.

3. Confirm the deletion.

9.3.2 Inactivating a Paragraph

Inactivating a paragraph will keep it listed in the Paragraphs utility, but will cause it to not appear on any of the dropdown menus throughout the other EXPERT modules. This is a useful feature for Requirements and Exceptions paragraphs which may not be deleted if they have ever been used.

1. Select the paragraph you wish to inactivate from the Paragraphs window.
2. Click on the **Edit Current Entry** button.
3. Check the *Inactive* checkbox in the Details window.
4. Click on the **Save Changes** button, or click the **Undo Current Changes** button to cancel.

9.4 Reactivating a Paragraph

Inactive paragraphs may be reactivated, which will cause them to be selections on dropdown menus for future orders.

1. Select the *Inactive* radio button above the Paragraphs window. The list of inactive paragraphs will appear in the window.
2. Select the paragraph you wish to reactivate from the Paragraphs window.
3. Click on the **Edit Current Entry** button.
4. Uncheck the *Inactive* checkbox in the Details window.
5. Click on the **Save Changes** button, or click the **Undo Current Changes** button to cancel.