# Accessing Canaan Title Plant

Accessing Canaan Title Plant requires three pieces of information; a company identification number, a username, and a password. These three items are provided by Canaan Title Solutions, or your company administrator.

Double click the Canaan Title Plant icon to get the login window - *Example A* to the right.

By selecting "Save Username & Company ID", this information is auto populated the next time the user accesses Canaan Title Plant. The password is never saved and must be entered each time.

Important: A user login cannot be used on more than one station at the same time. If a user attempts to log in with a user that is already in use, *Message B* to the right will appear. Clicking "Yes" will log out the user at the other station. Clicking "No" will close the Canaan Title Plant program on the current station. Note, this function does not exit the Canaan Title Plant program on the other station. If a user attempts to search at that station, *Message C* to the right will appear.

Security: Usernames and Passwords need to be confidential. Passwords should be changed periodically. See *Changing Access Password*.

A

B

C
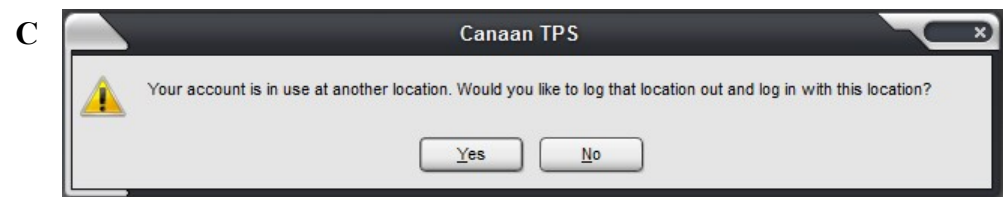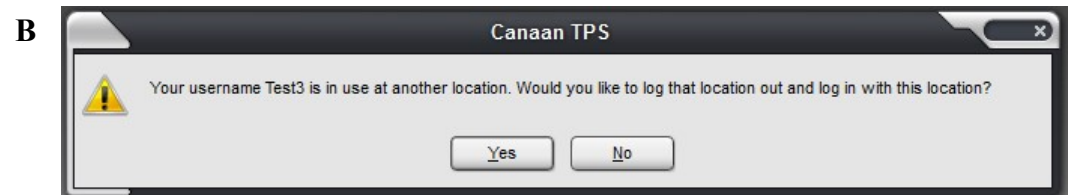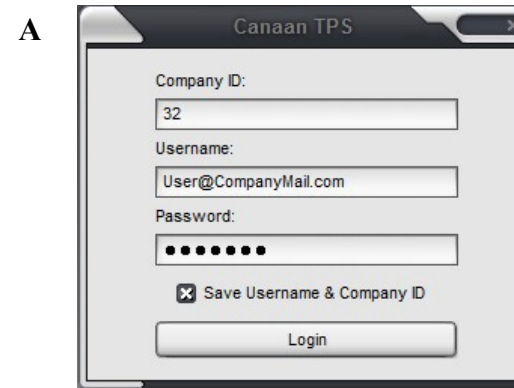
Order Management

Some users have access to the order management window—*Example A*—, which allows them to create orders where they can save searches for later viewing and use.

The list shows orders for the entire company; not just orders created by the current user.

The "Location" list contains the county order databases this user can access. Selecting a new location will refresh the list with orders from the new county.

The New Button pops up the window, *Example B,* so a new order number can be entered. Note, new orders must be unique in a county order database. The user will be warned if an order number is duplicated.

Click on an order number in the list, and press Open to enter that order. Or you can double-click the order number.

A user name in the Locked By field and a check box in the Locked column means this order is locked by another user. This does not mean another user cannot also view the order contents, but they would not be able to perform new searches or refresh old searches.

Unlock Order—from time to time an order will get stuck in a locked state, and the user that locked it is not available to unlock it. A user with 'Admin' rights has the ability to unlock the order with a right click (C) on Order Landing.

A

Location: OK_Washington_Orders ▾			Exit
Orders ▾		Open ▾	Quick ▾

New
Open
Rename
Save Order As
Change Status ▶

	Locked by:	Locked	Last Modified
		☐	10/21/2016 4:11:31 PM
		☐	1/3/2017 2:49:16 AM
		☐	1/19/2017 4:06:12 PM
		☐	12/9/2016 5:51:56 PM
▶ 36254		☐	8/18/2016 4:11:54 PM
25838		☐	8/18/2016 1:07:19 PM
23238		☐	9/7/2016 12:28:30 PM
42134		☐	11/24/2016 9:25:44 PM
42135		☐	9/15/2016 11:27:14 AM
24898		☐	10/4/2016 12:05:23 PM
42136		☐	11/1/2016 9:28:21 AM
37250		☐	9/21/2016 1:52:11 PM
13131		☐	8/22/2016 11:44:06 AM
42137		☐	8/22/2016 1:10:27 PM
42138		☐	8/22/2016 1:52:27 PM
42139		☐	8/22/2016 2:28:16 PM
42140		☐	11/8/2016 1:59:19 PM
42141		☐	8/22/2016 4:49:10 PM

B

Order #

Test-042613-01

Ok   Cancel

C

Edit Order #
Unlock Order
Fallout Results

Order Management—Finding an Order

As the list of orders grows, they will become harder find by scrolling through the list.
The field next to the orders button allows the researcher to search for an order number.

The drop down list (B) will display All, Open, or Closed orders.

A

| Location: | AR_Sharp_Orders | ▼ | | Exit |
| Orders ▾ | | Open ▼ | | Quick ▾ |

B

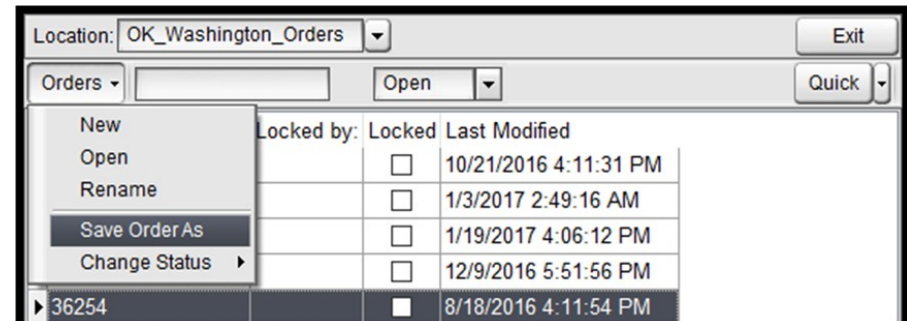| Orders ▾ | | Open ▼ | Quick ▾ |
		Open	
		Closed	
		Deleted	
		All	
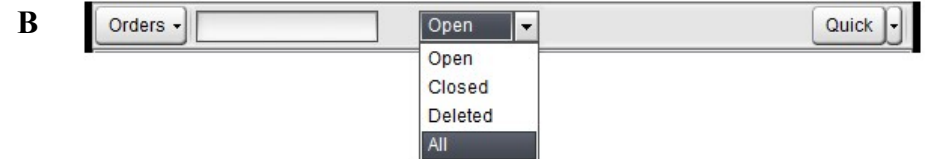
Order Management—Save As

If a previous order is a good start for a new order, the Save As function will allow the researcher to make a copy of the original order with a new order number.
The copy will retain all of the searches, all of the select and strike-through marks from the original order.

Locate the original order. It can be an open, closed or deleted order. Highlight that order in the list and click on the Orders button. Click on Save Order As and the name box (B) will appear. Enter the new order number and click Ok. The copy will be created and displayed. The order will be locked and ready for use.

A

| Location: | OK_Washington_Orders | ▾ | | | Exit |

| Orders ▾ | | Open | ▾ | | Quick | ▾ |

		Locked by:	Locked	Last Modified
New			☐	10/21/2016 4:11:31 PM
Open			☐	1/3/2017 2:49:16 AM
Rename			☐	1/19/2017 4:06:12 PM
Save Order As			☐	12/9/2016 5:51:56 PM
Change Status ▸			☐	
▸ 36254			■	8/18/2016 4:11:54 PM

B

Order #: 36254
New Order #

36254-NewName

[Ok]   [Cancel]

Order Management—Close or Delete

Once an order has been completed, it can be closed. An order can also be marked as deleted, but it's not actually removed.

Both closed and deleted orders can be found by switching the drop down list that typically says 'Open' to 'Closed' or 'Deleted'.

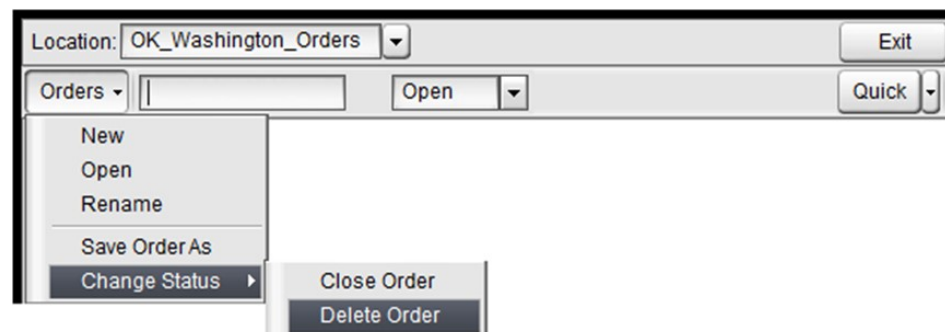Both closed and deleted orders can be restored to 'Open' orders.

To close or delete an order, highlight the order number in the list, click on the Orders button, click on Change Status and select either Close Order or Delete Order (A).

A warning box (B) will appear and the researcher will need to confirm the action by clicking the Yes button.

To reopen a closed or deleted order, find the order number and highlight it. Click on the Orders button and click on Change Status (C). Click on Restore Order, which is the only option. A warning box (D) will appear and the researcher will need to confirm the action by clicking the Yes button.
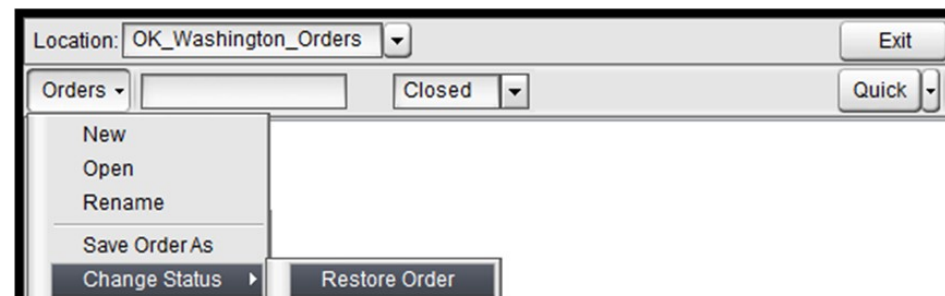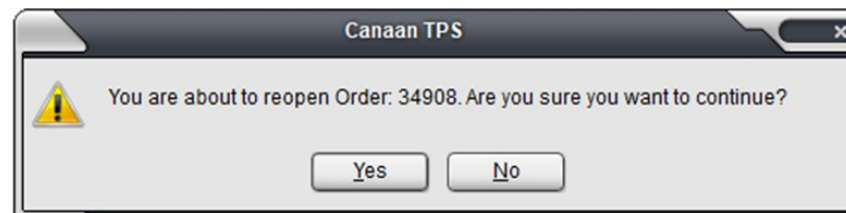
A

Location: OK_Washington_Orders ▾   Exit

Orders ▾ [   ]   Open ▾   Quick ▾

New
Open
Rename
Save Order As
Change Status ▸   Close Order
                    Delete Order

B

Canaan TPS   ✕

⚠ You are about to close Order: 27902. Are you sure you want to continue?

Yes   No

C

Location: OK_Washington_Orders ▾   Exit

Orders ▾ [   ]   Closed ▾   Quick ▾

New
Open
Rename
Save Order As
Change Status ▸   Restore Order

D

Canaan TPS   ✕

⚠ You are about to reopen Order: 34908. Are you sure you want to continue?

Yes   No

Hot Key List

Canaan Title Plant - Searching Hands on Help

Main Screen or Combined Search Window

Key	Action
F2	**Name Search Window or Tab**
F3	**Land Search Window or Tab**
F4	**Address Search Window or Tab**
F5	**Recording Search Window or Tab**
F6	**Other Search Window or Tab**
F7	**Combined Search Window or Tab**
F9	**Opens Print Results Window**
Shift **F9**	**Opens Print Results Window, w/Detail**
F10	**Filter to Not Processed. Ctrl F11 to Clear filter.**

Land Search Window

Key	Action
F8	**Add a second Qtr/Sec to same township**

Other Search Window

Key	Action
Esc	**Clears Doc Type Profile**

Search Window

Key	Action
F7	**Add or Save Record to Search**
Shift **F7**	**Add or Save Record to Name Search - Retain Last Name**

View Document Window

Key	Action
F8	**Request Image for selected row. Opens image window, if necessary.**
Ctrl ↑ ↓	**View Index Document - Up or Down.**
Ctrl ➡ ⬅	**View Index Document - through the pages of an image.**

OCR or Copy Image

Key	Action
Ctrl **Select** **O** **C**	**View Document Window - Hold CTRL button and use mouse to select an area of the image. Ctrl O will OCR that text. Ctrl C will copy that portion of the image. The contents of each are now in the clipboard. Press ESC to reset.**

Name Look-up Window

Key	Action
Ctrl **A**	**Selects all of the names in the list**

Results Grid

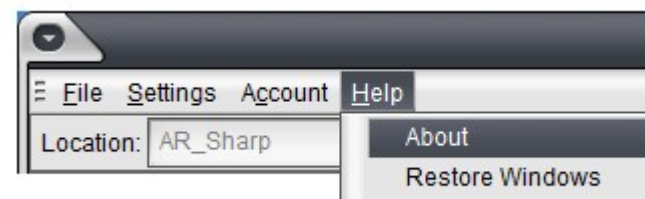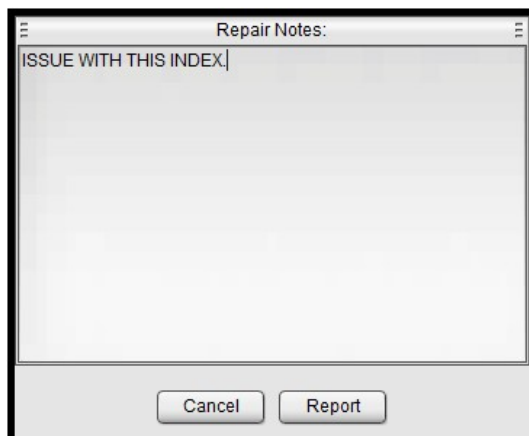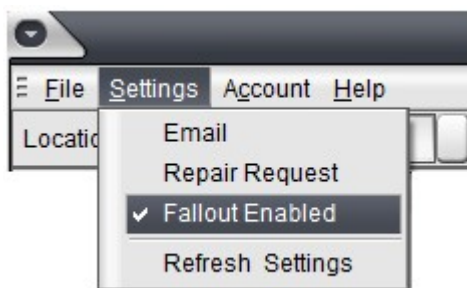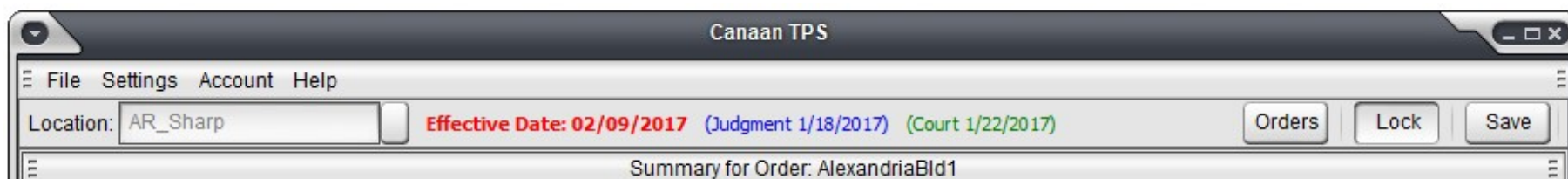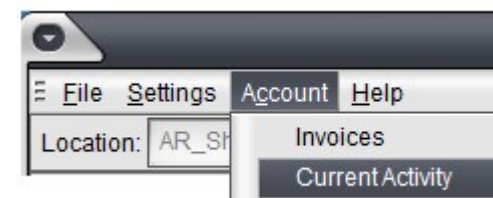| Key	Action
Double Left Click	**A Grantor or Grantee and it will initiate a name search with that name populated. (This only happens with a full Canaan database.)**
Ctrl **Space**	**Checks the Select box of the highlighted row. Single row only**
Ctrl **S**	**Strike-Through the highlighted rows. Multiple rows acceptable.**
Ctrl **N**	**Add Note to the highlighted rows. Multiple rows acceptable.**

Menu Bar

Settings-
1. The email setting is described on its own page.
2. Repair Request is used by researchers to send messages to the users that maintain the plant. The box to the right appears and allows the researchers to describe the issue. This is not available to online users.
3. Fallout Enabled is described in a different user guide.
4. Refresh Settings will refresh the effective date and the QuickList without having to exit program or switch counties.
5. Two additional dates have been added to go with Effective Date, if the company decides to use either one or both. If they use the additional dates, they will appear as shown. The name of the date and use of the date can be decided by the company.

Help-The About window has the build number of the software.
Restore Windows will move the image window to the left side of the main monitor.

Account-This menu item is used by the online users only to track their activity and download their invoices.

Email Setup

A user can email images from the Document Viewer in Canaan Title Plant. There are three ways to connect Canaan Title Plant to the user's email system.

Example A—This method uses the standard Mapi system that connects most programs to Microsoft Outlook. It is on by default, and there is no further setup required.

Example B—This method is for users with gmail accounts or for companies that allow Google to host their company email. The user needs to press the Authorize button and a Google wizard will take them through the rest of the process. The user will enter their email address and password and answer a couple of questions.

Example C—This method uses the basic "Simple Mail Transfer Protocol", and some additional information will be needed on a per-company basis. Talk to a Canaan Title Solutions representative for help using this method. When used a "Send To:" field will appear for the user to type an email address.

Security: The email and password are encrypted in the stored location to protect them from being discovered and used by others.

A

Email Settings:
- Default: Use this setting if you have a default Windows email program configured such as Outlook.
- Gmail IMAP: Use this if you use Gmail in a web browser.
- SMTP: Send mail by connecting to an SMTP server.

Ok   Cancel

B

Email Settings:
- Default: Use this setting if you have a default Windows email program configured such
- Gmail API: Use this if you use Gmail or GApps Mail.
- SMTP: Send mail by connecting to an SMTP server.

Authorize

Ok   Cancel

C

Email Settings:
- Default: Use this setting if you have a default Windows email program configured such as Outlook.
- Gmail IMAP: Use this if you use Gmail in a web browser.
- SMTP: Send mail by connecting to an SMTP server.

Email Address: SMTP Address:

EmailName!@CompanyEmail.com   SMTP Address

Password: SMTP Port:

••••••••   465

Test Connection

Ok   Cancel

Changing Access Password

Each user has the ability to change his/her own password.

Click on File and Change Password, and the Change Password window will appear—*Example A* to the right.

The user must enter their current password, their new password, and confirm by entering the new password again.

Note: At this time, Canaan Title Plant does not require strong, complicated passwords. Although, they can be used, if desired. However, a password must be used; the password cannot be left blank.

Security: Usernames and Passwords need to be confidential. Passwords should be changed periodically.

A

Searching—Name

Name Search—F2 quick key to launch window.

Type in a name, last name, then a comma, and then the first name. (example: Fox, Pam). Press the Add button or an F7. (Shift F7 to retain the last name for an additional search.)

The name must be in the Full Name grid to be search, so the researcher must hit Add or F7 on each name to be searched. The researcher can search several names at one time.

Both, Grantor, Grantee—Both will search the grantor field and grantee field. The other two will only search its specific field.

All, Name, Legal—All will search for document with legal descriptions and without. Name will only return documents without legal descriptions. Legal will only return documents with legal descriptions.

Other, Buyer, Seller is a feature that does not affect searches.

Nicknames uses a table in the database that contains typical nicknames. The nickname label is a hyperlink. If pressed it will display the nicknames that will be searched for the first name in the Name field.

There is a Soundex value for first names and for last names. If the researchers uses a wildcard (%) in either part of the name, Soundex will be disabled for that part.

Initial Matching will look for names keyed with initials that match the researchers search criteria, i.e. Matthews, Brett would return Matthews, B.

Blank First Name will return results where the last name matches, but there is nothing in the first name field.

Note, if you click on an item in the grid, it will be put in edit mode. Press the Save button before searching.

All Name searches first show a Name Look-Up window to select names. Ctrl + A will select all of the names in the list.

A

Searching—Name Refresh

When you refresh a name search, the researcher will see the names that were found in the original search, and the names that were selected originally will be selected again. A name that is displayed in red is a name that has new index recorded since last search, or a record with that name has been edited since the last search.
For accuracy, it's still the liability of the researcher to check all of the names in the list.

This function is not available on the Combined Search Refresh. The Name Look Up on a refreshed Combined Search will not show names in red.

A

Names:	Results:
● HAWN, JUDITH	☐ HAM, J L
	☒ HAWN, JUDITH
	☒ HAWN, JUDITH A
	HAWN, JUDITH ALICE
	☐ HAMM, JUDY A
	☐ HAWN, JUDY
	☐ HAWN, JUDY A
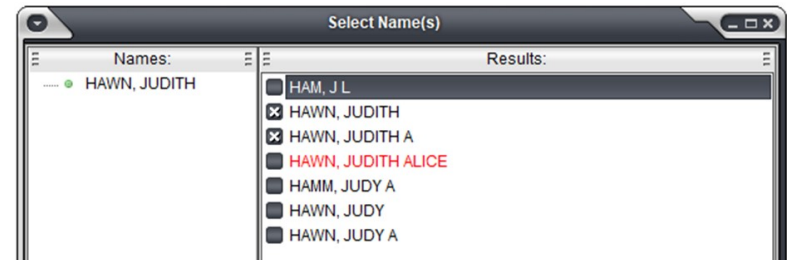
Searching—Legal

Legal Search—F3 quick key to launch window.

Type in land description into proper fields. Press the Add button or an F7.

The legal must be in the Full Legal grid to be search, so the researcher must hit Add or F7 on each legal to be searched.

The researcher can search several legals at one time.

A range is designated by two dashes (--) in the range fields, such as Lot, Block, Arb, Unit.

A comma is used between criteria that is not consecutive in the range fields.

Checking Null Arbs, when the Arb field is being used, will search for records matching the rest of the search criteria, but doesn't have anything in the arb field. Same for Null Blocks.

Search criteria can contain a date range of either filed date or instrument date. Mark the proper radio button to select the desired date.

Assignment and Releases. This function locates documents joined together by the related fields.

Disabled turns this function off. This means the Related button on the results screen will not link related documents together.

Include turns this function on.

Include Filter by Legal turns the function on, but only returns related documents that match the search criteria or have no land descriptions keyed.

Note, if you click on an item in the grid, it will be put in edit mode. Press the Save button before searching.

A

Searching—Legal—Land Validation

Some counties have access to a land validation database. For the indexer of the plant, it helps keep the indexing consistent and accurate.

The researchers now have access to it through the Lookup button, if the county being searched has this land validation database.

The researcher will enter a portion or the entire legal description they will search and click the Lookup button (A). The legal lookup box (B) will appear. It shows all of the land validation entries found per the search. The researcher can move through the pages of results using the record bar at the bottom of the screen.

The user can double click the Notes box and it will pop out into a new window (C) for easier reading. Double click to exit that pop up box.

This feature is informational only. Using the Lookup does not affect the search. It merely allows the researcher to check the legal against the land validation database, and possibly adjust their search, or gather information from the notes.

This feature is not available in all counties or with all license types.

A

B

C

Searching—Address

Address Search—F4 quick key to launch window. Type in address into proper fields. Press the Add button or an F7.

The address must be in the Full Address grid to be search, so the researcher must hit Add or F7 on each address to be searched. The researcher can search several addresses at one time.

Note, title plant often do not have any addresses keyed or these fields are used very sparsely.

Note, if you click on an item in the grid, it will be put in edit mode. Press the Save button before searching.

A

Searching—Recording

Recording Search—F5 quick key to launch window.

Type in document number, or book and page into proper fields. Press the Add button or an F7.

The recording information must be in the Full Recording grid to be search, so the researcher must hit Add or F7 on each recording to be searched. The researcher can search several recordings at one time.

The F7 will return to the cursor to where the user started. If Doc # it will stay in Doc #. If in Book No, it will return from Page # back to Book #.

The search window covers two types of searches. Exact match recording searches, and related searches.

When the Recording radio button is marked, the search will return the exact results.

When the Related radio button is marked, the search will determine if any document has been related to that recording information.

The search grid allows for one or more Recording searches with one or more Related searches.

Note, if you click on an item in the grid, it will be put in edit mode. Press the Save button before searching.

A

Searching—Other

Other Search—F6 quick key to launch window. Select criteria from the proper fields. Press the Add button or an F7.

The "other" information must be in the Full Other grid to be search, so the researcher must hit Add or F7 on each "other" information to be searched. The researcher can search several "other" type searches at one time.

Multiple items can be selected in the Instrument and Market Source boxes.

Note, if you click on an item in the grid, it will be put in edit mode. Press the Save button before searching.

Note, all of the other searches have a check box called Include Other. It enables this window as a tab on those searches. It can be used to refine the results of those searches.

Document Type Profile, if set up, will allow the user to limit results based on excluding or including document types.

Date only search can be performed in this search. Without having to select or enter additional criteria, enter a date range, press Add and Search.

A

Searching—Combined

Combined Search—F7 quick key to launch window.

This window contains tabs for all of the search types previously discussed. The F-key that launches the particular search window, also switches to that tab.

The purpose of this search is to create a very refined search, such as searching for a particular name in a particular addition.

Information added on a particular tab will be considered 'or' searches. Information between tabs will be considered 'and' searches. For example, a search could be, Smith, John OR Jones, Davey AND Lot 3, Blk 5, Lakeview Addition OR SWNE Sec 30, Twn 12, Rng 5.

Type search information into the proper fields. Press the Add button or an F7. Shift-F7 can be used on the Name tab to retain last name.

The combined information must be in the Full Combined grid to be search, so the researcher must hit Add or F7 on each combined information to be searched in each tab. The researcher can search several combined type searches at one time.

Note, if you click on an item in the grid, it will be put in edit mode. Press the Save button before searching.

A

Orders—Search Tree

The top part of the Canaan Title Plant searching module displays searches that have been performed.

The search tree, *Example A*, has one major header, All, and six sub-headers, Name, Legal, Address, Recording, Combined and Other, which represent the various searches that can be performed.
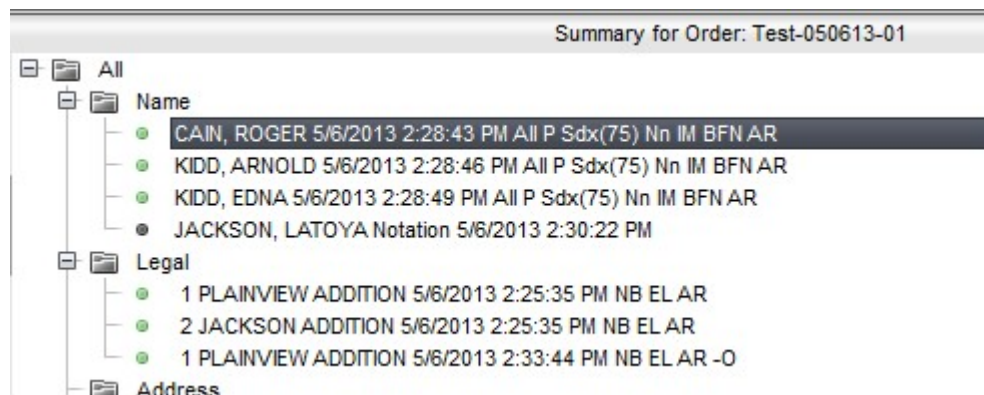
Under each sub-header are the individual searches. Clicking on a search will load the results into the results grid, not shown.

There is a dot next to each search. A yellow dot represents a search in process, and a green dot represents a completed search. A black dot represents a name that was searched, but did not have names that pertained to this order. See Name Look Up for more information.

Example B displays detailed information about the criteria and options used in that search.

Note: if the effective date has changed since the search was performed, the search in the tree will be displayed in a blue font. Its purpose is to let the researcher know this search has not been refreshed.

A

Summary for Order: Test-050613-01

All
  Name
    CAIN, ROGER 5/6/2013 2:28:43 PM All P Sdx(75) Nn IM BFN AR
    KIDD, ARNOLD 5/6/2013 2:28:46 PM All P Sdx(75) Nn IM BFN AR
    KIDD, EDNA 5/6/2013 2:28:49 PM All P Sdx(75) Nn IM BFN AR
    JACKSON, LATOYA Notation 5/6/2013 2:30:22 PM
  Legal
    1 PLAINVIEW ADDITION 5/6/2013 2:25:35 PM NB EL AR
    2 JACKSON ADDITION 5/6/2013 2:25:35 PM NB EL AR
    1 PLAINVIEW ADDITION 5/6/2013 2:33:44 PM NB EL AR -O
  Address

B

Searched Name:
  CAIN, ROGER
Selected Names:
  CAIN, ROGER
Name Type:
  Grantor & Grantee
Search Options:
  Soundex: (75)
  Nickname
  Initial Matching
  Blank First Name
  Include Assignments and Releases

Sorting, Grouping, and Filtering the Results

Sorting: Click on a column header to sort by that column. It will sort ascending. Click on that column again and it will change the sort to descending. To sort by multiple columns, click the primary sort column first. Then, hold down the shift key and click the secondary sort column.

	Selected	Pages	Grantor	Grantee	Filed Date	Book - Pag △	Instr Type	Legal	RBook - RPage #
▶	☐	6	BURNETT, MARY	FOCUS BANK	12/17/2012	835 - 193	MODIFICATION	Lot: 2 Blk: 1 Add: VANDIVORTS	789 - 385
	☐	6	BURNETT, MARY	FOCUS BANK	12/17/2012	835 - 193	MODIFICATION	Lot: 5 Blk: 7 Add: VANDIVORTS	789 - 385

Drag a column header here to group by that column

Grouping: Left click and hold on a column that will be grouped and push it up into the gray area. Once the column is released, it will group the records by that column. More than one column can be pushed into the gray area that will create sub-groups.

Book - Page #   △

	Selected	Pages	Grantor	Grantee	Filed Date	Instr Type	Legal	RBook - RPage #
▶	**Book - Page # : 835 - 193**							
	☐	6	BURNETT, MARY	FOCUS BANK	12/17/2012	MODIFICATION	Lot: 2 Blk: 1 Add: VANDIVORTS	789 - 385
	☐						Lot: 5 Blk: 7 Add: VANDIVORTS	

Filter: Hovering over any column header, the user will see an arrow in a box. Click on the arrow and a list will appear. (All) will show all records. (Custom…) will popup a filter wizard. Also, a distinct list of the data in the column will be shown with a check box. Checking a box or boxes will limit the results to those selections. In the example below, checking 'True' will limit the results to only the indexes selected. Clicking on the search in the search tree will reset the list back to (All).

Drag a column header here to group by that column

| Select ▽	Pages	Grantor	Grantee	Filed Date	Book - Pag △	Instr Type	Legal	RBook - RPage #
(All)	6	BURNETT, MARY		8/25/1983	406 - 687	MISC	Lot: 13 Blk: 23 Sub: CARUTHERSVILLE	
(Custom…)	4	BURNETT, MINNIE	UNITED STATES OF AMERICA	9/4/1990	464 - 401	DEED OF TRUST	Lot: 16 Blk: 6 Add: MENZIES	
☐ False	4	BURNETT, MARY	BANK OF HAYTI	9/11/1990	464 - 437	DEED OF TRUST	Qtr: SESE; Sec: 36 Twns: 18 Rng: 11	
☐ True	2	HOWELL, MARY	BURNETT, MARY	8/9/1991	470 - 481	WARRANTY DEED	Lot: 2 Blk: 1 Add: VANDIVORTS	

Button Bar—1
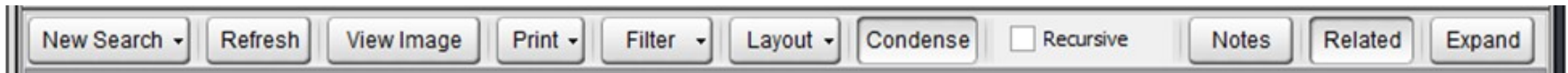
The **Button Bar** is used by the researcher to start new or refresh searches, to launch the View Document window, print or export the results, save the layout, condense (or uncondensed) the results, display notes on the grid, and display the related document links.
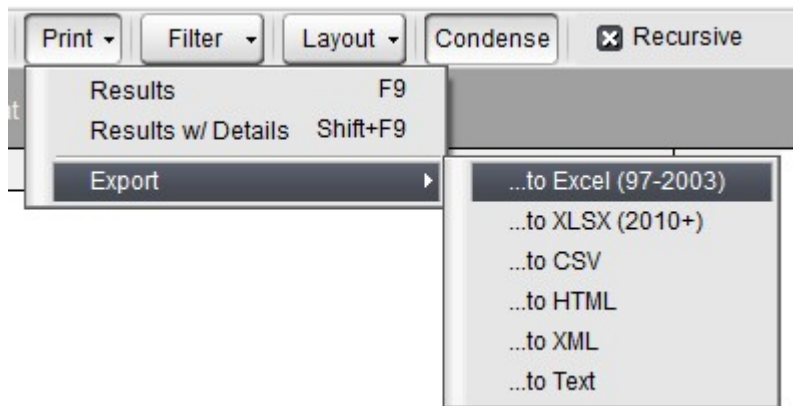
To print the results grid, click Print and Print Results or press F9 and a new window to print the results will appear.
In the previous version, when exiting the print results a message appears to print the search detail. In this version, there is a company setting now to choose to do that or not. If the company chooses not to have that message, they can still get the message by using the 'Results w/ Details' menu item.
The Export function is located under print, as well.
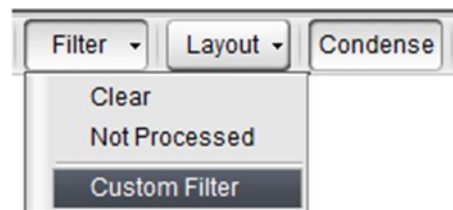
Filter—To see any rows in the search results that have not been selected or struck out, the researcher can click on Filter and Not Processed to remove the selected and strike rows from the view.
The user can click on Filter and Clear to make the select and strike rows reappear.
The filter will not hold when moving between searches.
Warning, if something is selected or struck while filtered, that row will be removed and the remaining results reset to top. It will not hold its spot.
This function is not available under the All, Name, Legal, etc. tree header results.

Button Bar—2
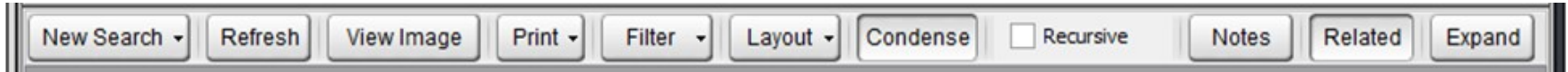
New Search ▾ | Refresh | View Image | Print ▾ | Filter ▾ | Layout ▾ | Condense | ☐ Recursive | Notes | Related | Expand

The **Button Bar** is used by the researcher to start new or refresh searches, to launch the View Document window, print or export the results, save the layout, condense (or uncondensed) the results, display notes on the grid, and display the related document links.

Saving the Layout. There is a layout for each of the search types, legal, name, etc, along with the All results. This means each search will need it's layout setup. If a change is made to the name layout, it will not affect any other layout. Ability to export and import layouts to use in other counties or to share with other users.

Layout:

- ☒ Selected
- ☐ Changed
- ☐ iRecID
- ☒ Pages
- ☒ Grantor
- ☒ Grantee
- ☒ Doc #
- ☒ Book-Page
- ☒ Filed Date
- ☒ Doc Type
- ☒ Consideration

OK
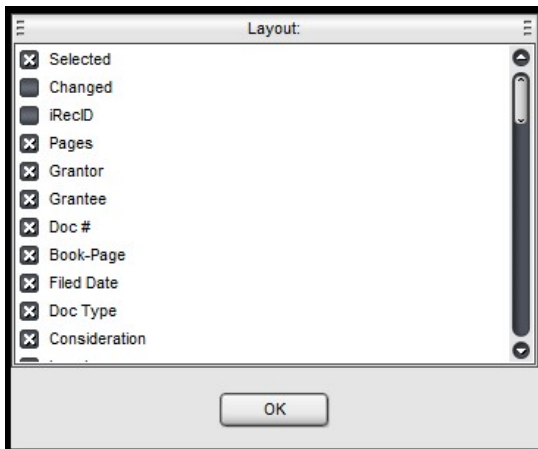
The **Show Layout** displays the fields the user has chosen to be on the results grid. The results grid will only display fields that have data in them. This is to save space by not having empty columns. The Show Layout allows the user to see the fields that have chosen for the results grid.
It will show the layout for the type of search currently loaded.

Searching—Useful Features

Lock an Order: When returning to an order, the user must press the Lock button to be able to perform new searches, or edit and refresh old searches. The user does not have to Lock the order to view searches or images, or print results or images. The order will unlock itself when the user exits or returns to the order management window.
—There is now an Admin function to unlock without needing to have the 'lock' users name and password.

Refresh a Search: To see if new results will be added to a search days or weeks later, press the Refresh button. Name and Combined searches will popup the Name Look Up window so the user can determine if new names should be checked. All other searches will just be initiated. If the Refresh search finds additional entries, a new results column will be added and a red dot will signify a new entry.

Edit Criteria: To edit the criteria of a previous search, right click on that search in the search tree and select Edit Criteria. It will reopen the search window with the previous criteria already populated. Make edits and click the Save button or press F7.

Remove Search: To remove a previous search, right click on that search in the search tree and select Remove Search. It will popup a warning message. Click Yes to remove and No to cancel.

Save a Search: Searches are automatically saved after the new results are displayed the first time. However, a user can hit the Save button to manually save the search.

Showing Related Link: Related records, i.e. the release of a mortgage, can be displayed in two manners. First, the related record will be present in the results, if the search criteria matched the information on the related index, or if the research set Include A&R on the search. The full record of the related index will appear in the results just like the rest of the documents. If the user presses the Related button, a short version the Related record will appear under it's original document. It will be noted by a plus sign (+) that the user can press to see the related record, or the user can hit the Expand button to show them all. The Related and/or the Expand button have to be pushed each time the search is loaded.

Condense the Results: The results will show multiple rows for a single document because of multiple grantors, grantees, legal descriptions, addresses, and/or related recordings. The Condense button will remove all of the rows except one, and retain the row that matches the search criteria. The Condense button has to be pushed each time the search is loaded.

Add/Display Notes: The researcher can add notes to an index and they will display on the results grid and at the top of the View Document Window. These notes only appear on this index in this order. The note button will turn blue when the order has notes.

Information Bar

A   [progress bar image]   Documents: 44   C

All Results

B   Search saved successfully   Tester Three   D

E   Location: ST_County_Orders   Effective Date: 05-16-2013   F
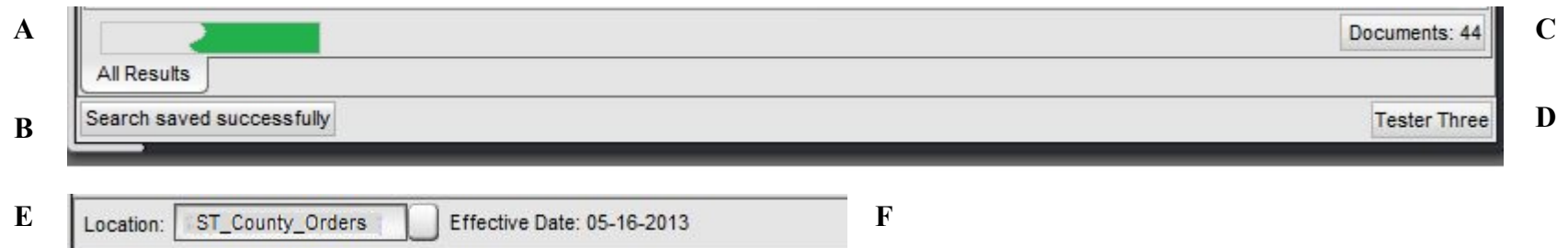
A - Progress Bar: The progress bar is shown anytime a result set is being loaded in the viewer area.

B - Auto Save Message: Searches are saved after the user views the result set and moves on to another action, such as viewing another result set, searching, or exiting. The message appears after this action. Even if the message doesn't appear, it doesn't mean the search wasn't saved.

C - Document Count: This number reflects the number of documents shown in a result set. It does not show how many rows of information has been found.

D - User Logged In: This is the users full name as entered into security. It is not the name the researcher uses to login to Canaan Title Plant.

E - Location: This box shows the current location the researcher is accessing. For the non-order management user, they will switch locations with this box.

F - Effective Date: If the host/owner of the data is maintaining the effective date of their plant, then it will be shown here. It will also print on the reports. If the function is setup, the effective date will appear in bold red when the effective date is currently older than a set number of days.

Print Results
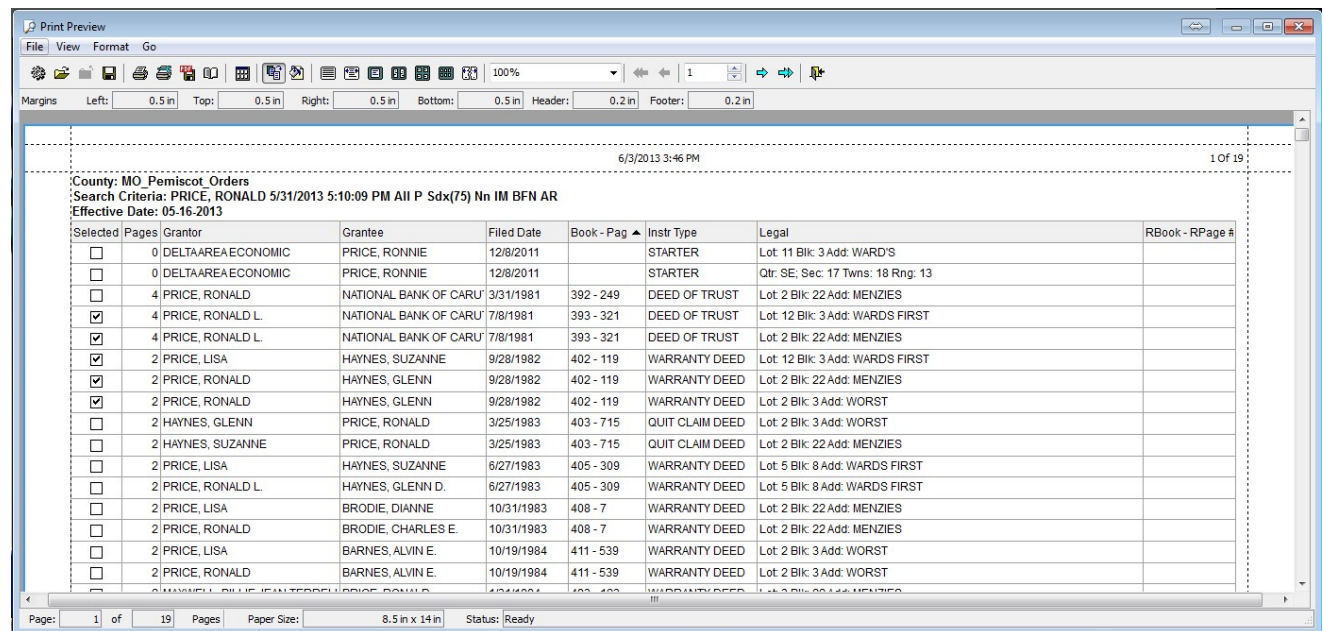
The window above appears when the user clicks the Print\All button above the results area.

The first printer button on this window prints immediately to the researchers default printer. The second printer button pops up a dialog box that allows the researcher to choose the printer and printer settings. The icon that looks like a floppy disk with PDF written above it will save the report as pdf. The researcher does not need an external pdf writer for this function to work. The icon that looks like an open book pops up a window to change page setup.

Note that the font size of report is determined by the amount of columns used in the report. If the report font is too small, the researcher may need to consider removing less useful columns, or possible grouping the results by one or two columns to shrink the width. When the user closes the print screen (X), the message below appears. This allows the user to print the search detail from the main screen. If the "Include Empty Searches?" is not checked any tree header search that doesn't have any selects will not print the search detail.
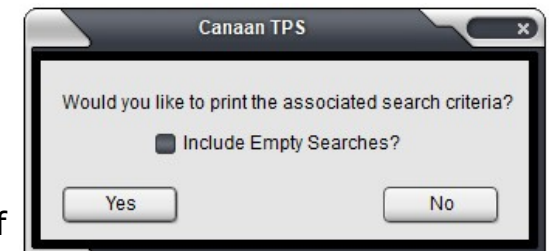
Print Details-If the company chooses not to have that message, they can still get the message by using the 'Results w/ Details' menu item.

View Document Window

View Document Window—F8 quick key to launch window. Ctrl F8 quick key to launch window, but only selected results.

This window has two parts. The left side shows all of the indexing that was keyed to this document, and allows the user to move through documents. The right side shows the document images and allows the user to manipulate it.

There are two buttons Fit Page and Fit Width. Canaan Title Plant will remember the last choice the user made.

There is an OCR and Copy Image function. See next page for instructions.
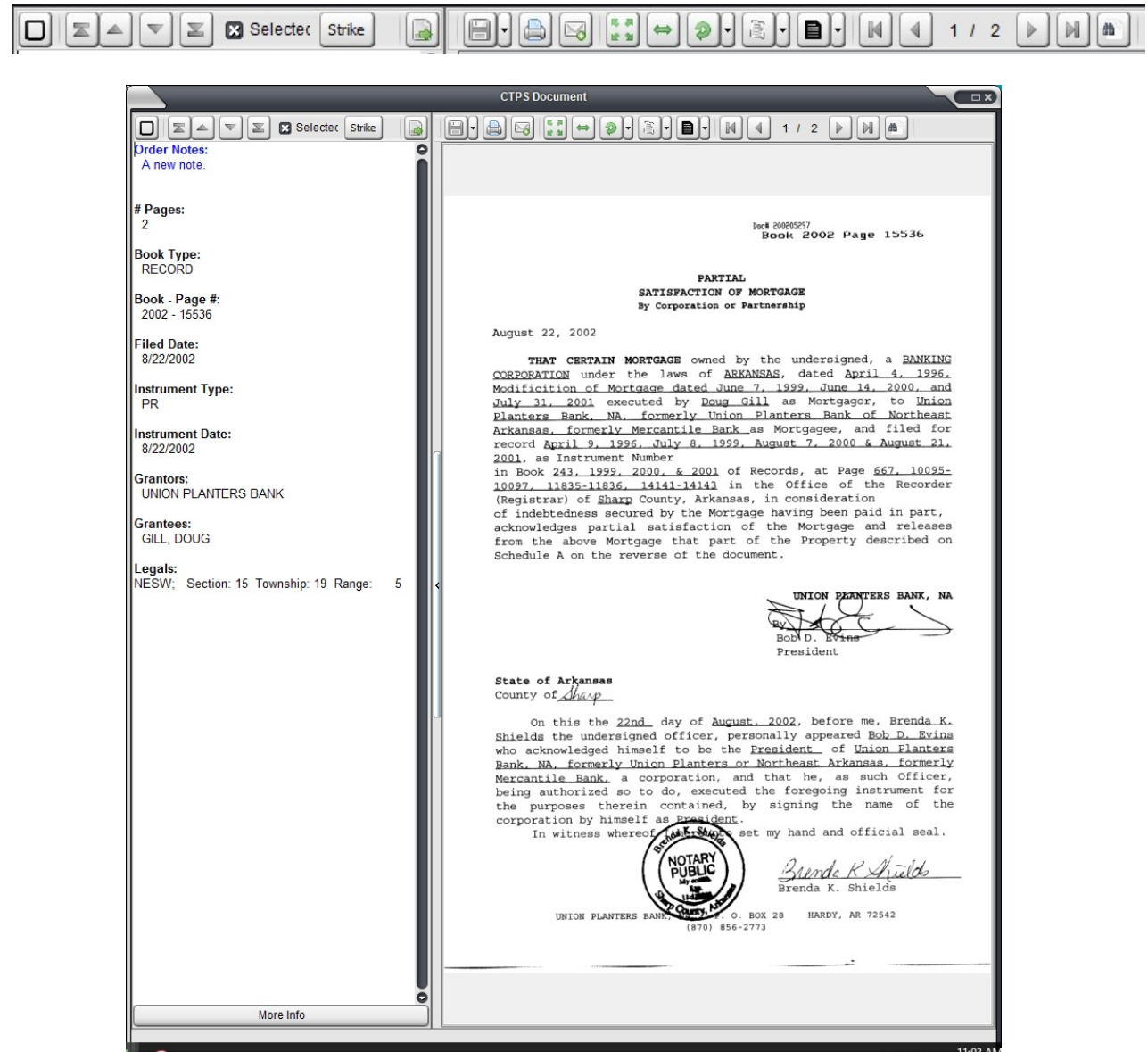
OCR or Copy Image

View Document Window—F8 quick key to launch window. Ctrl F8 quick key to launch window, but only selected results.

To use the OCR or Copy Image function, the user will click on the image window to give it focus, press and release the Ctrl key and use the mouse to 'cut' a selection of the image. If the selection is not exactly what was needed, the user can hold the Ctrl key down and use the circles on the selection box to reform that selection.

To OCR:
The user can either press O to OCR or press the first button on the 'new' menu bar. A message will state the Selection OCR'd to Clipboard.

To Copy the Image:
The user can either press C to Copy the Image or press the second button on the 'new' menu bar. A message will state the Image Selection copied to Clipboard.

With the OCR or Copy in the clipboard, the user can Paste into another program, such as Word or Paint.

Pressing ESC key will clear the selection.

View Document Window

View Document Window—Left Side—The first button controls whether the user will see all of the records, or if they will see only selected items. The two screenshots show the difference in the status of the first button. Then next four buttons move "all the way up", "up one document", "down one document", and "all the way down" through the documents. Clicking the Select box will put an x in the box, and also a check on the corresponding record in the results view.

View Document Window—Right Side—The first button saves the image to a location on your computer. It can save as a tiff file or a pdf file. The user makes that choice by clicking on the arrow next to the first button. The second button is the printer button. Instructions or on a separate page. The third button is the email button. The fourth button is the fit page button. The fifth button is the fit width button. The sixth button is the rotate image button. Each click rotates the image clockwise 90 degrees. The seventh button is the deskew image button. It will attempt to straighten a crooked image. The eighth button is the invert image button. It switches a black page with white letters to white page with black letters, and vice versa. There is an arrow next to buttons six, seven and eight that allows the action of the button to happen to the page show or to all pages in the document. Also, this action is temporary. The next time this document is requested it will revert back to previous settings. Buttons nine through thirteen move through the pages of the document. Button nine move to page one, button ten moves one back, button eleven moves one forward, button twelve moves to the last page, and button thirteen allows the user to choose the page to go to in the document.

Print, Email or Save Multiple Documents

Note, this function is only available with a full Canaan database. This right click function will not appear in a non-Canaan database system.

Using the Click-Shift-Click, or Click-Ctrl-Click, or a combination of both, highlight the records to be saved, printed, or emailed.

Right-click in the highlighted area to view choices.
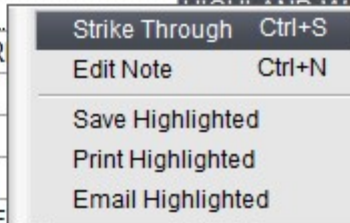
Save will open a Save As dialogue window.

Print will open a Print dialogue window.

Email will attach your documents to a email for you to send. See page 3 for email setup.

Select or Strike Through a Record

Note, this function is only available with a full Canaan database. This right click function will not appear in a non-Canaan database system.

If a document pertains to the researchers order, the user can Select a record by checking the box in the Selected column. The user can then use the All, Name, Legal, Recording, etc. folders in the search tree to see just the selected results. There is also a Selected check box on the View Document window.

If a document does not pertain to the researchers order, the user can click and then right-click on that document and click on Strike Through in the list. This will cross out the words in the results grid. This function will help a user keep track of which documents have been viewed.
Using the Click-Shift-Click, or Click-Ctrl-Click, or a combination of both, highlight the records to be strike through. Right click in the highlighted area to click on Strike Through. This function allows the user to strike through several documents, at one time. There is also a Strike Through button on the View Document Window.

A record cannot have a Selected and Strike Through status at the same time.

Document Notes

Note, this function is only available with a full Canaan database. This right click function will not appear in a non-Canaan database system.

Document Notes allows a researcher to add a note to each or any index contained in the order. The note will only appear for this index in this order.

The note will appear in two places. It will always appear at the top of the View Document Window. If the Notes button is pressed, it'll appear under the index in a blue font.

To create, add to, or edit a note, the researcher will right click on the index that needs a note and click on Edit Note. A box will appear. Once the note has been entered, click Save.

Order Notes Tab

Note, this function is only available with a full Canaan database. This right click function will not appear in a non-Canaan database system.


The Order Notes Tab allows a researcher to see all of the document notes in one location, and see the recording information for each note. This is informational only. The researcher can edit the note from here, nor can this window take the user to the search with this note.

On the left side, the researcher can type a note that isn't document specific, but is about the order itself.

The Print button prints the notes on this tab.

Print Document

The window above appears when the user clicks the print button on the View Document window. Here the user will choose whether to print All of the pages of the document, Selected pages, the Current Page: As Shown, or the Current Page: Unaltered.
Current Page: As Shown prints the image as it displayed in the window, and Current Page: Unaltered prints the entire, regularly, regardless of how it's displayed.
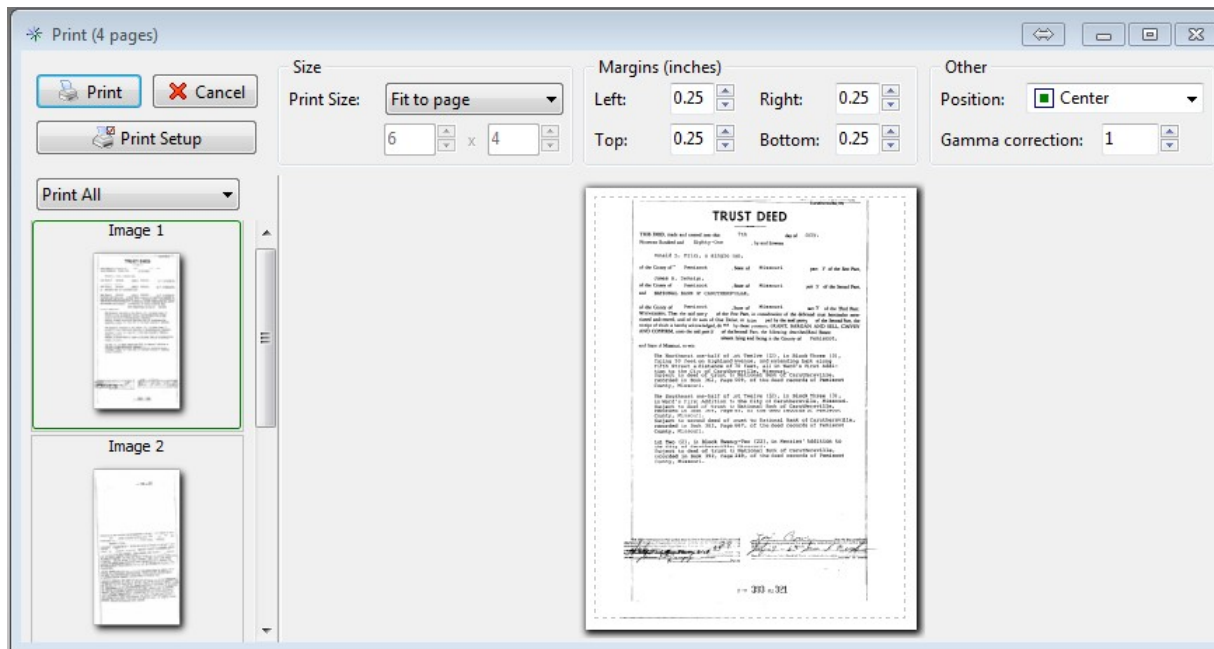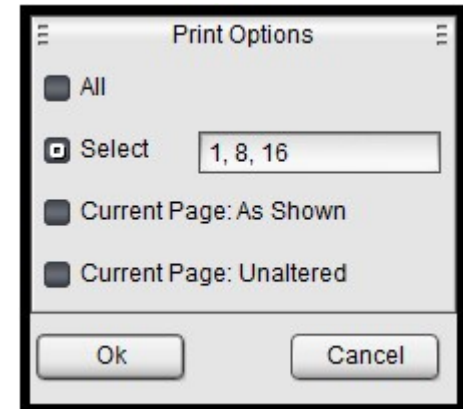

The window above appears when the user clicks the Ok button the Print Options box.
The Print Setup button allows the researcher to select the printer, and setting specific to the printer.
All images will be printed by default, but the researcher can use the Ctrl Click function on the image icons to select only the pages they want printed, then select Print Select from the list that defaults to Print All.

Troubleshooting

The document window or main window doesn't appear on the screen.

The user sees the icon in the taskbar for the main window or the document window, but the window(s) do not show on the user's monitor. For the main window, click on the icon in the taskbar to give the window focus and press the following keys: CTRL + ALT and press Z. The window should appear on the user's main window.

If the Document Window does not appear, then click on the main to give it focus and press the following keys: CTRL + ALT and press X. The document window should appear on the user's main screen or the user can click Help (on the menu bar) and Restore Windows. The image will move to the main window.
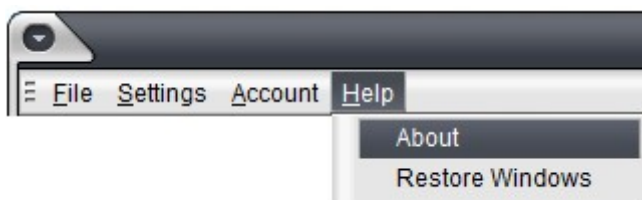
CanaanTPS or CanaanTPM is locked up.

If the program is locked up and will not let the user exit, and the user can't get to task manager to end the program, the user can hold CTRL + SHIFT and press DEL to exit the program. It is like task manager, so no data will be saved prior to closing.

Fallout

Canaan Title Plant has a feature called 'Fallout' for watching searches as batches are posted. This feature is not addressed in this guide. It has a separate guide.

Disclaimer

The function that creates the "red dot" on refreshed search results, and the "red name" on the refresh name look up could be affected if the data server and the user's station are in different time zones, or if one of the clocks time is off.