



GETTING STARTED: GENERAL NAVIGATION AND FEATURES

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Overview

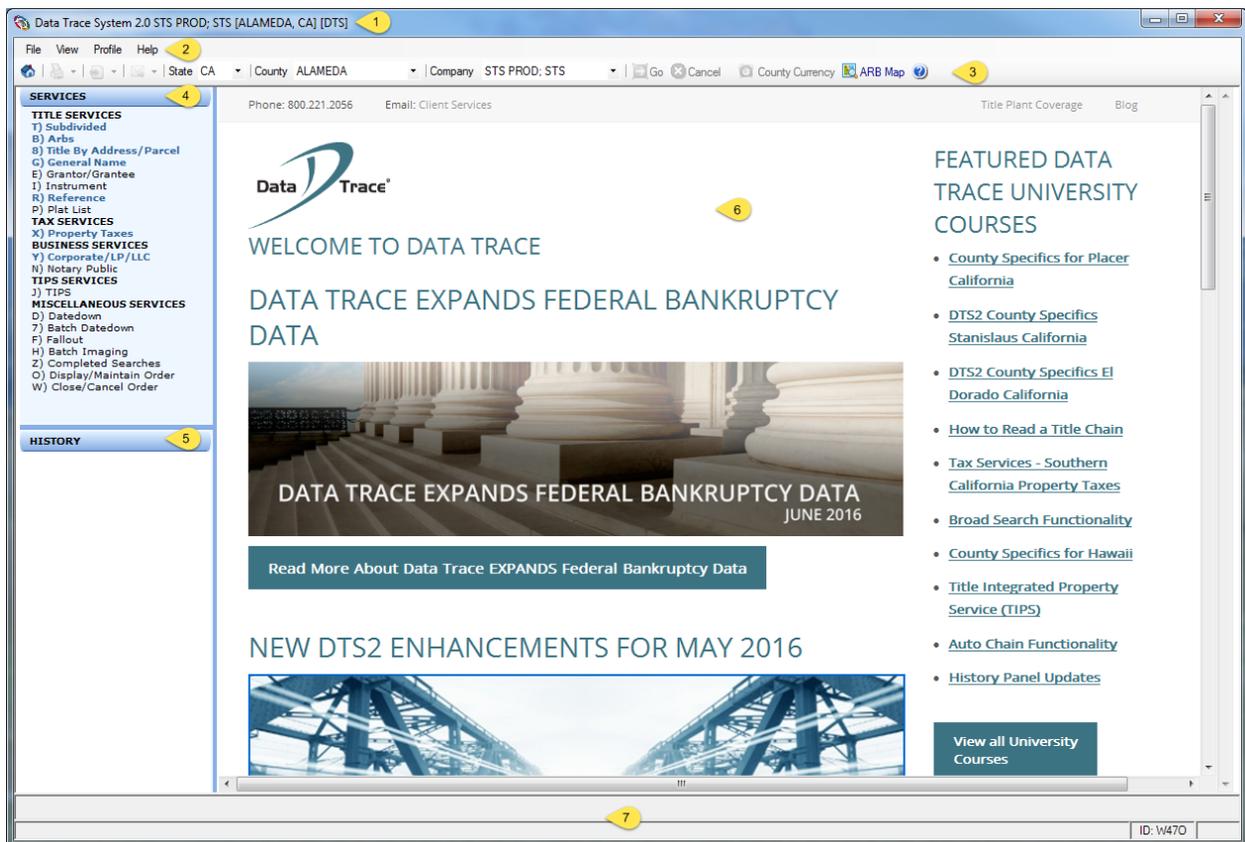
This document will walk you through the DTS2 interface, describing each major section and cover where features and services may be found. The information presented here assumes that you have already installed, registered and logged into DTS2. For information on installing DTS2, please see the [Getting Started: Installing DTS2](#) how-to guide on the DataTrace University home page. Service guides and elearning are also available on the University page.

Additionally, your company may have setup specific settings that will affect how the search and reports function and display. Please check the Profile Menu > User Profile option for information on your company settings

DTS2 is highly customizable and the services and features shown my not directly correspond to your company’s contracted setup.

Application window

The DTS2 application window can be separated into seven areas.



1. Title Bar
2. Menu Bar
3. Tool Bar
4. Services Panel
5. History Panel
6. Multi-function panel
7. Status Bar

Title Bar

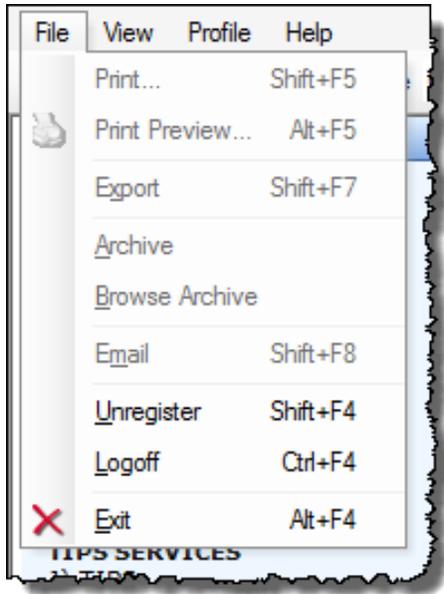
The Title Bar includes the count and state currently selected. Standard Microsoft Windows controls are also included (minimize, maximize, close).



Menu Bar

The menu bar contains four options: File, View, Profile and Help.

File Menu



Print and Print Preview: See below for Print options.

Export: Generates the report or images in PDF or TIF. See below for additional information.

Archive: Allow users to export a report to a central location on DataTrace's servers for later retrieval. This assists Client Services in quick retrieval on behalf of a client.

Browse Archive: No longer used

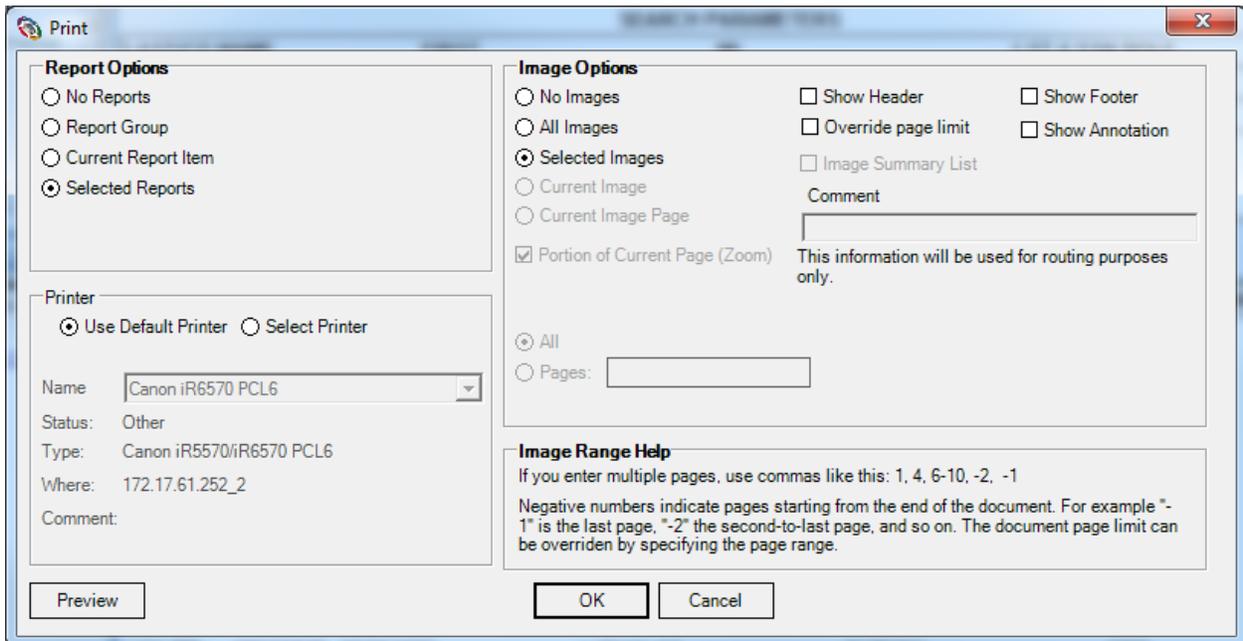
Email: Attaches the reports or images as a PDF to an email. See following screenshots for additional information.

Unregister: Removes the systems' login. Requires a restart.

Exit and Logoff.

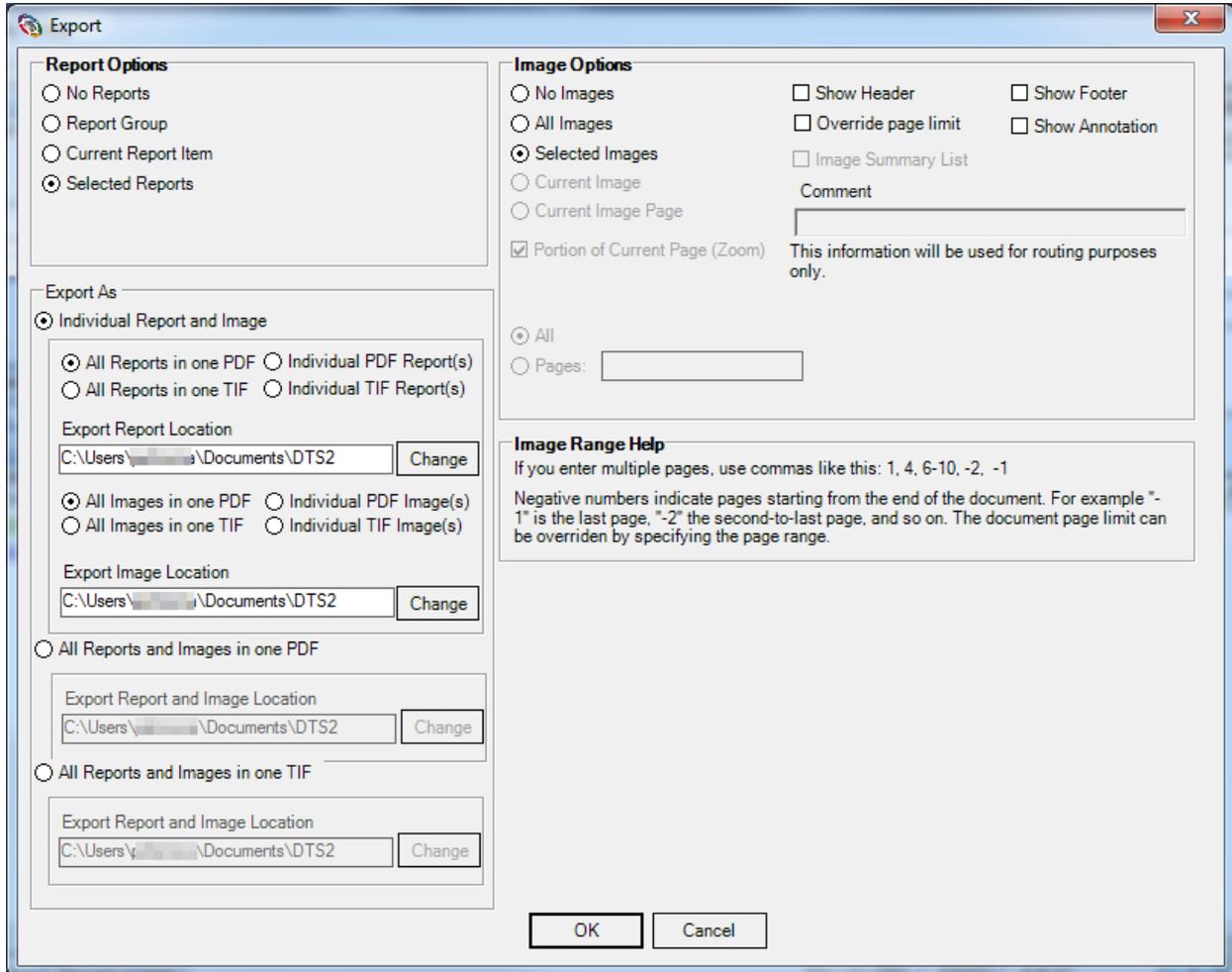
Print Menu Option (File > Print):

There are several additional options that allow you to print one or more reports or documents and provide formatting for the images.



Export Menu Options (File > Export):

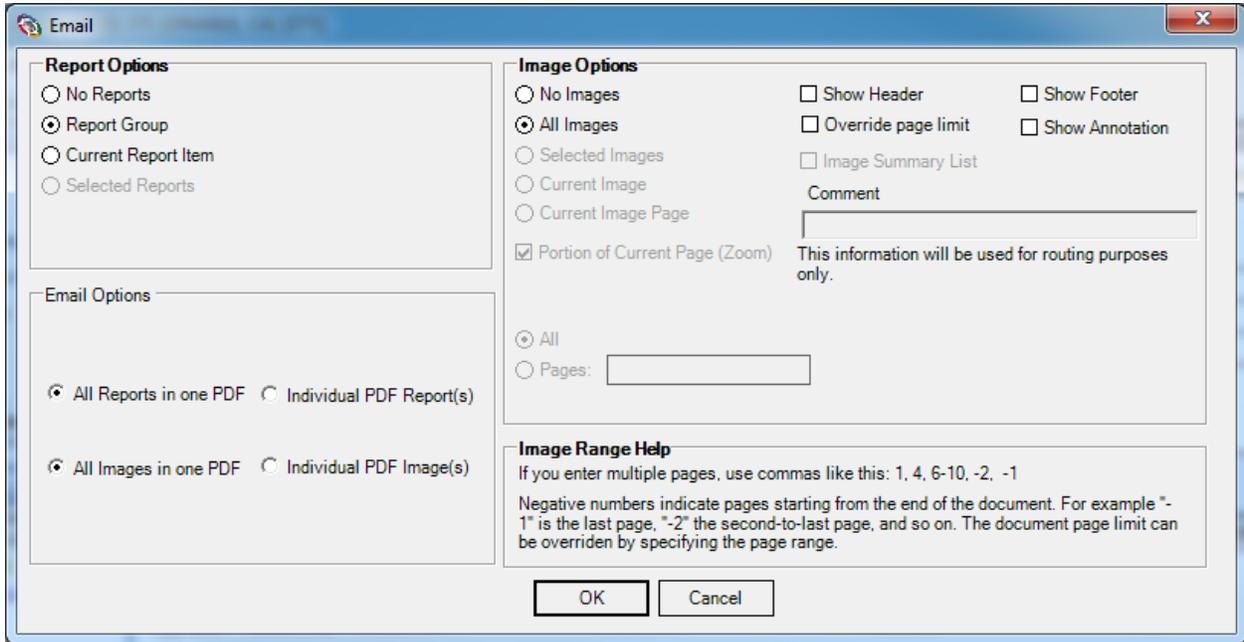
Similar to the Print menu option, the Export option will create PDF or TIF files and allow you to generate one or more reports or documents into specific locations.



This screenshot is an example only. Make sure to contact your IT or Desktop Support team to confirm the default export folder locations.

Email Menu Options (File > Email):

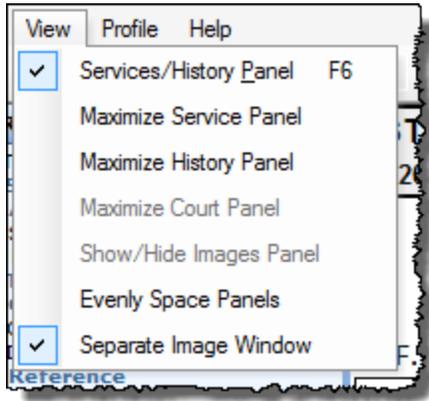
Similar to the Print menu option, select the reports or images to generate as single or multiple PDFs and attach them to an email.



Contact your IT or Desktop Support team for help in configuring DTS2 with your email client.

View Menu

The View Menu deals with resizing or the display of the Services and History Panel, shown at right.



Services/History Panel: Will show or hide the left hand panel of the DTS2 application window. Hiding these panels allows displaying a larger Application Window.

Maximize Service Panel: Extends the Services panel to maximum height and collapses the other panels.

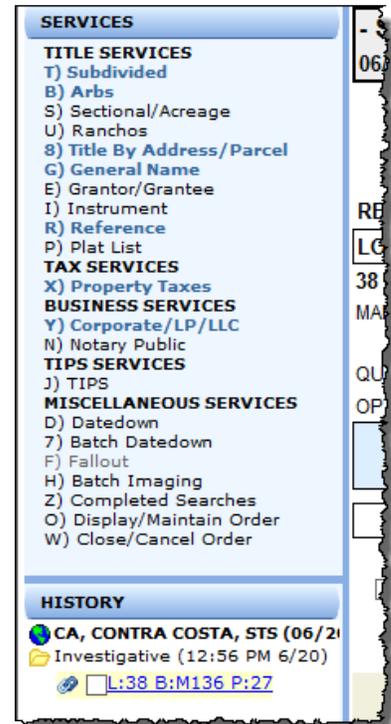
Maximize History Panel: Extends the History panel to maximum height and collapses all other panels.

Maximize Court Panel: Disabled and no longer used

Show/Hide Images Panel: Disabled and no longer used.

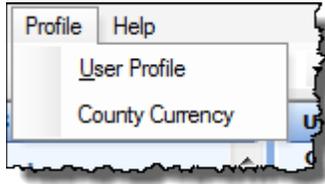
Evenly Space Panels: Just like it sounds.

Separate Image Window: Creates a separate window to display images.



Profile Menu

User Profile



Despite the name, the User Profile shows your company's search defaults for both Investigative and Order Options. **These are your company's' default settings controlling how data is displayed. Change these at your own risk.**

A few additional notes about these setting:

1. Modification to these settings applies only to the immediate search you are running. Changing searches, counties, or logging out of DTS2 will revert the settings back to the company defaults.
2. The settings are county-specific. Not all settings shown apply to every county.

Global Services – Global Options:

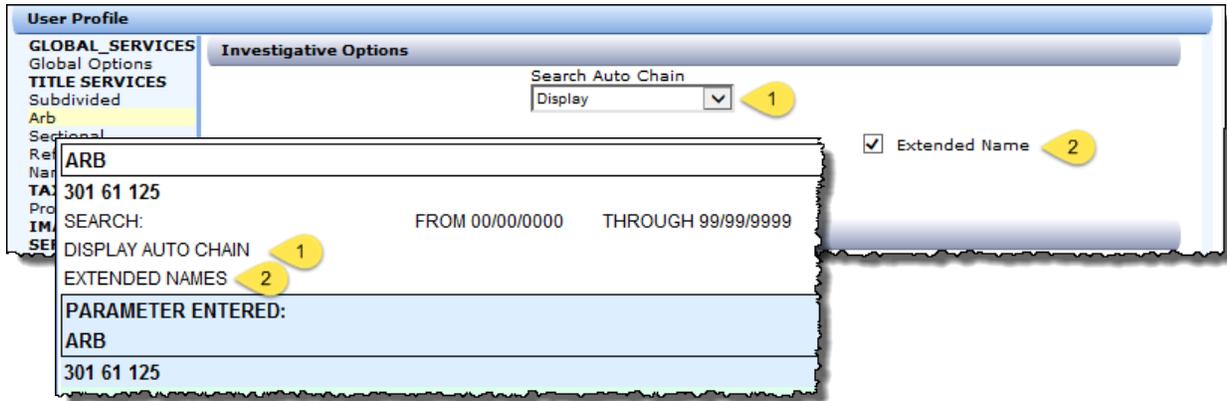


- 1 & 3. Printed Reports and Order Options: These simply control the report format – either Detail or Condensed. The checkbox in the Order Options section allows you to keep orders open past 30 days.
2. Datedown, Fallout, Order History: Controls if Title and/or Tax services are affected by the Datedown and Fallout services.

Title Services:

These settings are county dependent and will not show for all counties. Each Title Service will contain two panels: Investigative Options and Order Options. A summary of the options is followed by screenshots.

Example: The Arb profile settings for a given county also show in the report for the Arb investigative search.



Options Summary:

Investigation Options:

Search Auto Chain:



Options which allow you to run a “genealogical” search of the parcel and include “parent” or “child” parcels of the subject parcel. These options are county-dependent.

Overlapping Property: Checkbox option (yes/no). Includes parcels that may affect the subject parcel.

Extended Name: Checkbox option (yes/no)

Sort: Date order, newest to oldest or the reverse.

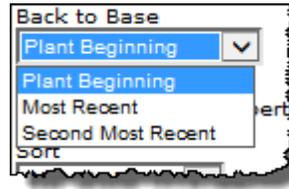
Consolidated Legal: Checkbox option (yes/no). Includes that parcels various recorded legal descriptions from newest to oldest.

All References: Checkbox option (yes/no)

Nickname: Checkbox option (yes/no)

Order Options

Back to Base



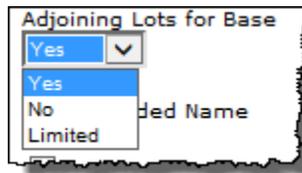
Controls how far back the starter (base) should search.

Search Auto Chain



Options which allow you to run a “genealogical” search of the parcel and include “parent” or “child” parcels of the subject parcel. These options are county-dependent.

Adjoining Lots for Base



Sets the whether or not adjoining lots should be considered in the starter.

Overlapping Property

Checkbox option (yes/no). Includes properties that may affect the subject.

Extended Name

Checkbox option (yes/no)

Sort

Date order, newest to oldest or the reverse.

Consolidated Legal

Checkbox option (yes/no). Includes that parcels various recorded legal descriptions from newest to oldest.

Append Unreleased Encumbrances

Checkbox option (yes/no)

Create a Base

Automatically create a Starter.

Permit Datedown

Checkbox option (yes/no)

Use in Fallout

Checkbox option (yes/no)

All References

Checkbox option (yes/no)

Nickname

Checkbox option (yes/no)

The following screenshots are not representative of your company's defaults. These are for example purposes only. For questions on your company's settings contact your manager.

Title Services – Subdivided:

User Profile

GLOBAL_SERVICES
Global Options

TITLE SERVICES
Subdivided 
Arb
Sectional
Reference
Name

TAX SERVICES
Property Taxes

IMAGING SERVICES
Imaging Options

Investigative Options

Search Auto Chain
Display

Overlapping Property Extended Name

Sort
Oldest to Newest Consolidated Legal

Order Options

Back to Base
Plant Beginning

Search Auto Chain
Display

Adjoining Lots for Base
Yes

Overlapping Property Extended Name

Sort
Oldest to Newest Consolidated Legal Append Unreleased Encumbrances

Create a Base Permit Datedown Use in Fallout

Title Services – Arb:

User Profile

GLOBAL_SERVICES
Global Options

TITLE SERVICES
Subdivided
Arb 
Sectional
Reference
Name

TAX SERVICES
Property Taxes

IMAGING SERVICES
Imaging Options

Investigative Options

Search Auto Chain
Display

Extended Name

Sort
Oldest to Newest Consolidated Legal

Order Options

Back to Base
Plant Beginning

Search Auto Chain
Display

Extended Name

Sort
Oldest to Newest Consolidated Legal Append Unreleased Encumbrances

Create a Base Permit Datedown Use in Fallout

Title Services – Sectional:

User Profile

GLOBAL_SERVICES
Global Options

TITLE SERVICES
Subdivided
Arb
Sectional
Reference
Name

TAX SERVICES
Property Taxes

IMAGING SERVICES
Imaging Options

Investigative Options

Search Auto Chain
Display

Overlapping Property Extended Name

Sort
Oldest to Newest

Order Options

Back to Base
Plant Beginning

Search Auto Chain
Display

Overlapping Property Extended Name

Sort
Oldest to Newest

Create a Base Permit Datedown Use in Fallout

Title Services – Reference:

User Profile

GLOBAL_SERVICES
Global Options

TITLE SERVICES
Subdivided
Arb
Sectional
Reference
Name

TAX SERVICES
Property Taxes

IMAGING SERVICES
Imaging Options

Investigative Options

All References Extended Name

Order Options

All References Extended Name

Permit Datedown Use in Fallout

Title Services – Name:

User Profile

GLOBAL_SERVICES
Global Options

TITLE SERVICES
Subdivided
Arb
Sectional
Reference
Name

TAX SERVICES
Property Taxes

IMAGING SERVICES
Imaging Options

Name Investigative Options

Nickname Sort
Oldest to Newest

Name Order Options

Nickname

Sort
Oldest to Newest

Create a Base Permit Datedown Append Unreleased Encumbrances Use in Fallout

Tax Services – Property Tax

User Profile	
GLOBAL SERVICES Global Options	Investigative Options
TITLE SERVICES Subdivided Arb Sectional Reference Name	<input checked="" type="checkbox"/> Improvements
TAX SERVICES Property Taxes	Order Options
IMAGING SERVICES Imaging Options	<input checked="" type="checkbox"/> Permit Datedown

Imaging Services:

User Profile	
GLOBAL SERVICES Global Options	Imaging Options
IMAGING SERVICES Imaging Options	Image Print Options
	<input type="checkbox"/> Show Header
	<input type="checkbox"/> Show Footer
	<input type="checkbox"/> Include Summary List
	Image Print Order
	Chronological <input type="button" value="v"/>

County Currency:

This feature is also county specific and may not be displayed in all counties.

Profile	Help
User Profile	
County Currency	

County Currency
PRODUCTS
Plant Currency
Tax Currency

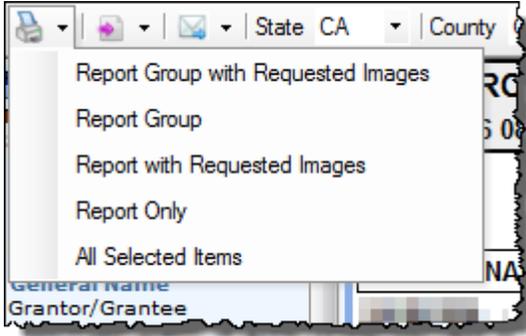
Click on either Plant or Tax Currency to review the thru dates for the county.

County Currency	
PRODUCTS Plant Currency Tax Currency	Plant Currency
Full Through Date:	JUNE 16, 2016
Instrument Through Date:	JUNE 16, 2016 05:00 PM
Instrument Through:	2016- 421757
Court House:	APRIL 02, 2016
Plat List Through:	MAY 04, 2016

Tool Bar

The left hand side of the tool bar contains controls for the following:



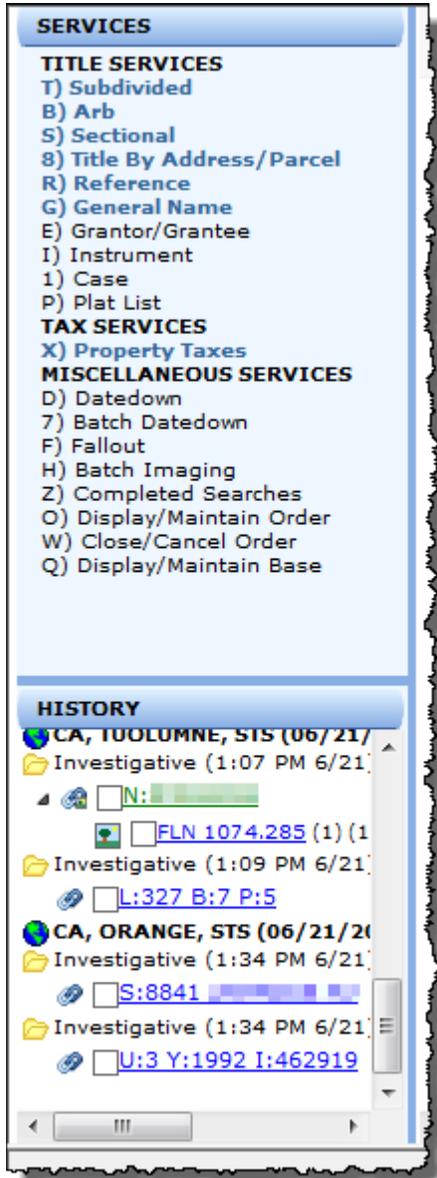
1. Home:	Returns you to the DTS2 home page and clears the search or document from the multi-function panel. It does not clear your history panel (see the History Panel section below for additional information).
2. Print	Print, Create PDF, and Create Email all include the following options:
3. Create PDF	 <p>These options give you the ability to print, create pdfs, or create and email one or several reports with or without the images (or all selected items).</p>
4. Create Email	
5. & 6. State and County Selects	Select your state and then your county in which you need to work. Click "GO" to change to that county (9, below).



8. Your company ID	Your company's name and designated abbreviation.
9. & 10.: Go and Cancel	After selecting a state and county, click "GO" to switch to that county (or Cancel to stay in the existing county)
11. County Currency	This is county specific. Returns the same information shown in the County Currency section , above.
12. ARB Map	Launches the DataTrace Arb Maps website. Once on the page, select the state and county you are researching and enter the Arb information to retrieve the required map.

Services Panel

The available services displayed in the services section will vary by county and your company's contracted services.



To use a service simply click on the service name or, if you like keyboard shortcuts, use hold down the control key (CTRL) and the corresponding letter next to the service name.

CTRL+S will open the Sectional service form while CTRL+X will start the Property Tax service.

For more information on the individual services, please see the How to Guides in DataTrace Title University (<http://www.datatracetitle.com/data-trace-university>).

History Panel

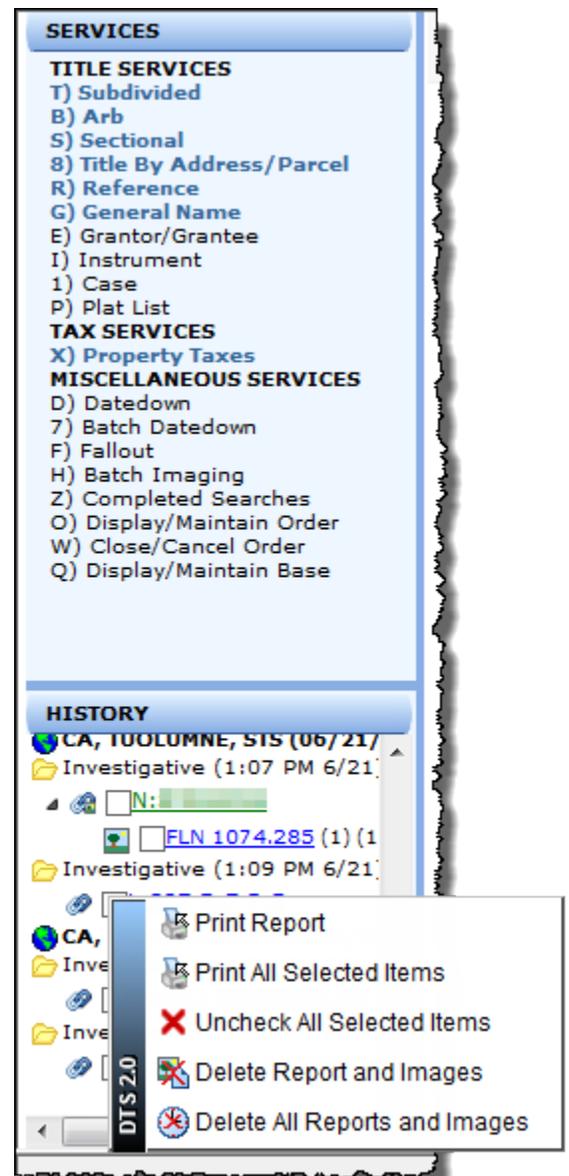
The history section of the panel will list all of your search results, grouped by county.



To return to one of your previous searches, click on that search or document and the item will be reloaded into the multi-function panel.

This panel will be cleared automatically when you end your session or quit the application.

You can also right click on any of the searches or documents and delete or print them.



Multi-Function Panel

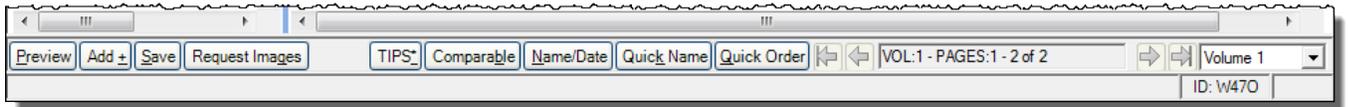
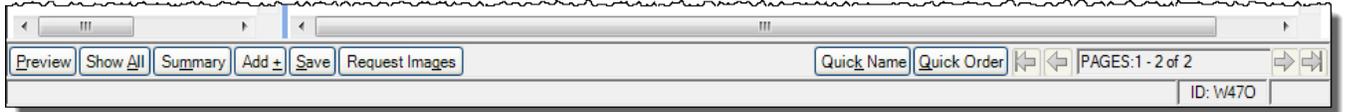
The main area of DTS2 is used to provide various forms for entering search criteria, displaying search results, system updates, and training information, as shown below.

The screenshot displays the Data Trace software interface. The top navigation bar includes 'File', 'View', 'Profile', and 'Help'. The main area shows a 'WELCOME TO DATA TRACE' message and 'DATA TRACE EXPANDS FEDERAL BANKRUPTCY DATA'. A sidebar on the left lists various services under categories like 'TITLE SERVICES', 'TAX SERVICES', and 'MISCELLANEOUS SERVICES'. A search results window is open, showing 'DATA TRACE, ANE, NATL' with 'INVESTIGATIVE SEARCH RESULTS'. The results include a table of 'PARAMETER ENTERED' with columns for LOT, HI LOT, BLOCK, PLAT, SUB LOT, and HI SUB LOT. The search parameters are: JUNE 16, 2016 (Full), PLANT THROUGH INSTRUMENT: 2016 - 421757, and COURT HOUSE: APRIL 02, 2016. The results table shows a match for LOT 107, HI LOT 107, BLOCK 308-21, PLAT 308-21, and SUB LOT 107. The search was successful, displaying 'CROSS REFERENCE SUCCESSFUL' and 'MATCHED CROSS REFERENCE LEGAL'. The interface also shows a 'HISTORY' panel with recent search activities and a bottom toolbar with buttons like 'Preview', 'Show All', 'Summary', 'Add', 'Save', 'Request Images', 'Quick Name', 'Quick Order', and 'PAGES: 1 - 6 of 6'.

Button Bar and Status Bar

The bottom of the DTS2 application window will change depending upon what service you ran, providing additional functionality and allowing you to jump to Tax, Title, preview documents, or navigate through pages.

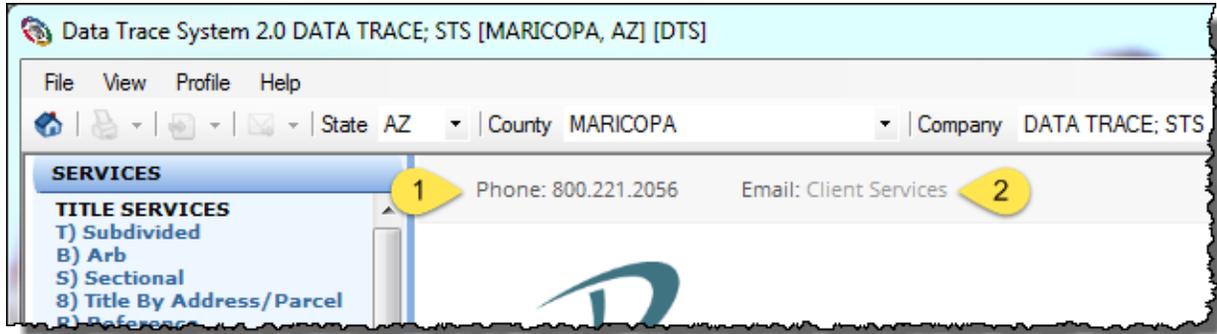
These features will be explained in the Services How To Guides as required.



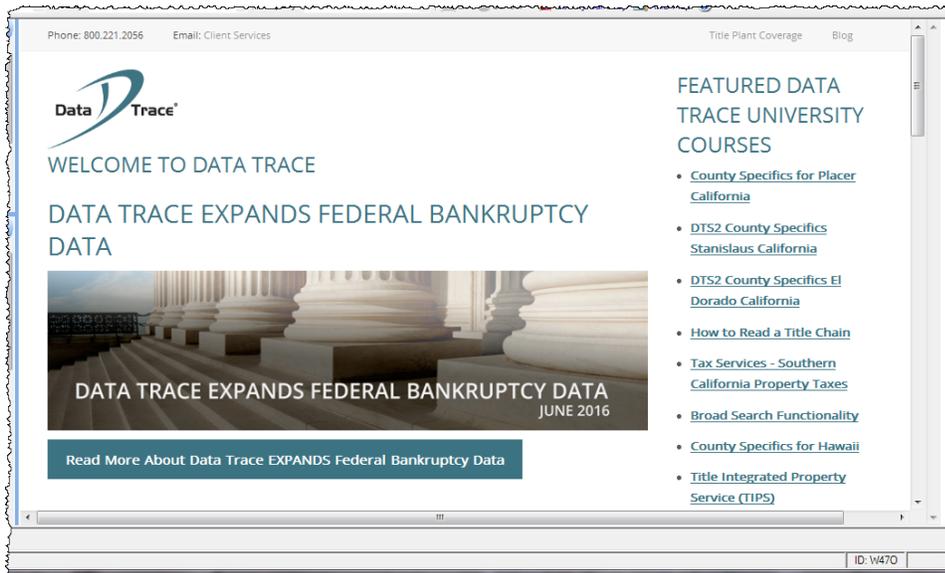
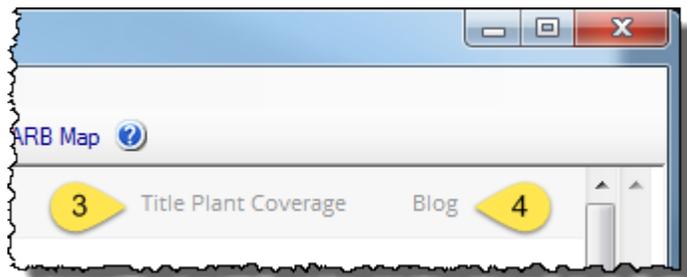
Getting Help

There are several ways to get assistance in DTS2.

The Client Services phone number and email link are always at the top of the DTS2 home page:



Plant Coverage information and Blog topics are included at the top right hand corner of the application window:



Finally, the multi-function panel includes the latest updates as well as links to elearning content.