



Resolution³ - Indexing

Webinar Training Series

Webinar Series: Indexing

1. Indexing – Tips & Tricks

Date

March 8, 10 am

Topics

Shortcut keys

- Ctrl keys
- Moving through tabs without using the mouse

Manipulating Names and Property Entries

- Reordering without deleting work already completed
- Modifying without deleting work already completed
- Copying from previously indexed instruments

The Originals Tab

- Discuss the difference between the FIND, ADD, VIEW buttons
- Explain the option boxes in Original Tab

Difference between Load Pre-Assigned and Load Workgroup

Viewing records already indexed and verified

Key from Image Functions

- Warning messages when accessing a group of work – what do they mean?
- How to copy data from an image without typing

2. Indexing – Administrative Functions (pt. 1)

Dates

March 15, 10 am

Topics

Online Corrections vs. View Records

Unlocking Records/Workgroups

Managerial Modification

Workgroup Locator

Rejecting Documents

Review Existing Options Available

- Proof/Correct vs. Key Verify
- Workgroups vs. Document Control
- Key Data from Image
- Auto Indexing
- Requiring Kind Entry
- Locking File Date
- Auto Selecting Workgroups

Indexing Documents with over 100 Names

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3. Indexing – Administrative Functions (pt. 2)

Date

March 22, 10 am

Topics

Subdivisions/Condominiums

- Adding/Modifying entries in table
- Consolidating entries in table

Name Codes - Adding/Modifying Entries in Table

Adding Frequently Used Addresses for Mailing Labels

Kind Codes

- Discussion on grouping/titles of kinds – how does this affect searching records?
- Consolidating kinds
- Securing certain kinds of records

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4. Indexing – Reports

Dates

March 29, 10 am

Topics

Productivity Report

Correction Report

Instrument Status Listing

Key Verify Statistics

Daily Register Report

Document Flow

Firm Occurs Report

Filing Statistics

Index Print

Instrument Occurs Report

Post Cards by Kind of Document

Basic eSearch

Dates

March 13, 10 am

March 27, 10 am

Topics

Search general overview

Using wildcards to find best results

How to sort results

Printing search criteria, search results and images

View selected images – navigating through images Husband/Wife search

Searching names that may have different spacing and special characters

Webinar Topics

Tips & Fees
March 8

*Administrative
Functions (pt 1)*
March 15

*Administrative
Functions (pt 2)*
March 22

Indexing
March 29

Basic eSearch
March 13
March 27



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