

# NJPA REAL ESTATE JOURNAL

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COVERING THE STATES OF NEW JERSEY AND PENNSYLVANIA

By Nancy Hendrickson, free-lance writer

## DataTree, LLC allows end-users to order and manage land records from their desktop

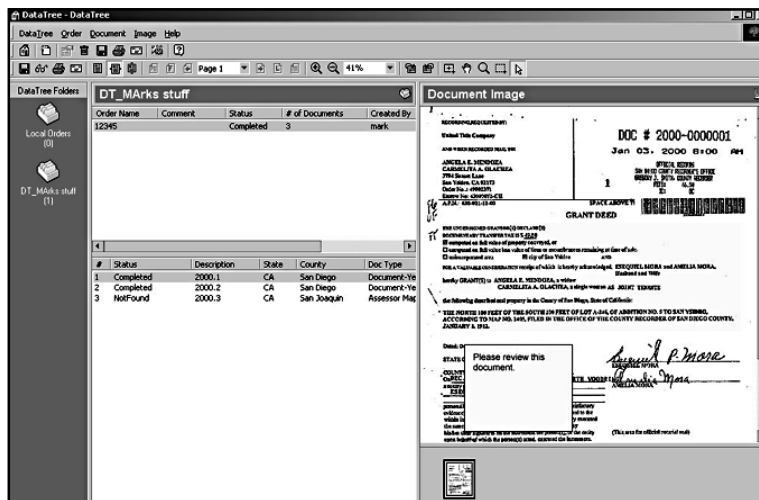
Land record research and retrieval—known as the most tedious and time-consuming task in real estate transfer and financing—has slowly made its way into the digital age.

Not so many years ago, the best technology had to offer was the transfer of paper documents to microfilm. Later, records made their way to CD-ROM. Although both methods were a step-up from on-site courthouse research, neither addressed two of the greatest needs in the industry: Time and efficiency.

Today, real estate professionals can either retrieve records at a local courthouse, or build a film library. The first option involves standing in a long line, then waiting while a clerk retrieves the microfilm, puts it in a reader/printer, adjusts the clarity, then prints the document. The second option is more convenient, but requires an investment in film, storage, equipment and man-hours.

In an industry in which time really is money, another option is clearly required. Recently, I had the chance to try out a solution-based software package which appears to address both industry concerns and industry needs.

Called DataTree for the Desktop, this document retrieval—and work flow—package was developed by DataTree, LLC, a San Diego, California-based corporation. Introduced in 2001, the software allows end-users to order and manage land records from their desktop computers. Currently, the database contains 1.3 billion documents and represents 10-20 years worth of records from 190



U.S. counties. Records are updated daily, and users can access the system 24/7.

### Out-of-the-Box Ease

DataTree can be run on most versions of the Windows Operating System, including 98, NT, ME, 2000 and XP. By design, it has the look and feel of other Windows-based software. If a client is familiar with Microsoft Word, Outlook, or Excel they'll find navigating the program a breeze.

Although many industry-specific software programs have a steep learning curve, within a half-hour of installation, I was ordering and retrieving documents.

For a feature-rich product to have such an intuitive design and user-friendly interface is unusual. While some data retrieval packages force users to move back and forth between several layers of windows, as soon as you log onto DataTree you can jump right into the ordering process. And, once your

documents have been retrieved, everything is displayed on a single screen.

Connection choices include a dedicated high speed line (WAN/LAN), the Internet or a company intranet.

### One-Click Shopping

DataTree for the Desktop really is a one-click document retrieval system. Once you log on, you can accept the default settings and go straight to the order form. Within seconds documents will be transferred from the database to your computer. From there, you can manipulate the size and orientation of each page, as well as print, save, and e-mail entire documents or single pages.

Built into the software are several "smart" features. For example, you can search by property's street address, owner's name, assessor's parcel number or recorded instrument number to locate documents. It also displays how current the database is for a specific record

type. That way, if a user is checking to see if there's a lien against a property, they won't have to guess how up-to-date the data is.

How fast is document retrieval? In my own test, I logged onto the Internet via a cable modem and ordered 25 documents containing a total of 230 pages. The entire order was sitting on my computer in less than 3 minutes—which calculates to less than 1 second per page.

### Document Management

Once the download was complete, I could view my order, thumbnail images of each page, and the electronic folders which contain my orders—all on a single screen. For quick tasks like zooming, rotating and resizing an image, just click the icons which are located on a standard Windows-like toolbar running across the top of the page.

If you need to print an entire document, just click the print icon. However DataTree is designed so users can print selected pages, or even a small, user-defined, section of a page. Why waste resources printing an entire document when only a legal description and front page of a Deed of Trust is required.

Documents can also be easily e-mailed or saved. When e-mailing, users can select whether to send the entire document as a .PDF (Adobe Reader) or TIFF (graphic format) file, or single pages can be sent as a TIFF.

### Workflow wonders

Although the speed of document retrieval and manage-

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ment is impressive. DataTree's ability to enhance workflow sets it apart from every other retrieval package.

In the real estate industry, workflow is constantly interrupted as the title document file folder is passed from person to person. Unfortunately, it's not unusual for time to be lost searching through a file cabinet or a colleague's desk for the folder. In addition, more time is wasted trying to decipher a hurriedly scribbled note tossed into the file.

With DataTree's ability to create a complete digital file, workflow is never interrupted as the file makes its way through each work station. Here's why.

Creating electronic folders makes it possible—and easy—for everyone using a local area network (LAN) to share the same documents. Instead of making paper copies of the file, the folder is put on a shared network so anyone in the department can use it. This means one team member can e-mail the file at the same time another member is printing a single page to fax to a client.

In addition, everyone working on the file can access the same documents, even those which are not DataTree generated. That's because the program allows users to scan or move non-DataTree records into the electronic file folder.

For example, a tax report, credit report, information a real estate agent sent to the escrow officer, an Excel spreadsheet, or an estimation of escrow costs can all go into the same electronic folder.

The external documents which are not in electronic form can easily be scanned with the TWAIN compliant feature built into the software. A single click will automatically pop-up whatever scanning software is on the user's system, to instantly scan and import related documents.

Enhancing the workflow even more is the ability to electronically annotate documents. Using this feature, which is exclusive to DataTree, users can highlight any section of the document, or attach an electronic 'sticky note'. Sticky notes replace the handwritten memos like: "this is the legal description, use this", or "take a look at this signature." The annotations alert other team members to anything that needs attention, and unlike handwritten notes, they'll never fall out of the folder.

Clearly, the workflow features of DataTree change how companies can manage their staff, as well as how they can save time and money in the physical transfer of documents. Instead of sending a courier to another office or across town, all or part of the electronic folder can simply be

e-mailed. Or, if needed, specific pages can be printed and faxed. Once a project is completed, the entire folder can be stored on the user's system for future reference.

### Have it your way

Although I ran DataTree for the Desktop straight out of the box using the system defaults, I ended up customizing the user settings. With past industry-specific software, I've steered away from trying to change too much for fear of crashing an over-sensitive program. However, I changed nearly every default DataTree setting without a single hitch.

For example, one of the defaults is a boilerplate disclaimer which is automatically printed on each map. Using a bitmap editing program, I designed a customized disclaimer which includes a company logo and my own text. I also created a customized cover page.

In essence, users can set up many of their own defaults. For instance, you can choose whether or not you want to automatically print each order. Or, select the PCL (print command language) commands option for faster printing. You can even choose whether to print footers on each page, or if you want each job printed individually—a choice you may make if you have several people placing orders.

If you want, you can purge

orders from your local order folder after a specified number of days.

For users on a local area network, it's critical that each person working on the folder has the same version of the document, including any new annotations or scanned in additions. This can be done by selecting a low number of minutes as a default before folders are refreshed.

### My Take

I ordered and downloaded dozens of documents using DataTree for the Desktop, and not once did I encounter a technical problem. I also found the user customization feature packed with the bells and whistles one would expect in a mainline program—not an industry-specific package.

However, as responsive and intuitive as the program is, I found its deeper value in the way it addresses a larger need—that of creating and maintaining an electronic document repository which facilitates workflow in the real estate industry. The instant document delivery, selective printing and e-mail capabilities are icing on the cake.

As Tanya Conger, production manager, said "I'm truly impressed with how far you've taken the technology in this industry."

My thoughts exactly.

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