



INDEX BATCH IMPORT – Important read me

*Information regarding Index files:

- ✓ You will need to specify a Transaction Code (instrument trans code) for the conversion as a default for the imported images and applicable index data. An example would be 'Conv' for Conversion. This code must also be setup in the Transaction Code table, located in the County Recording Control application.
- ✓ In the index data files, a numerical value is required in the 'Instrument #' field, such as (0, 1, 2...) This field cannot be blank. If the index data includes Old Instrument numbers then it is recommended to place a 0 (zero) in the Instrument # field. The system will not import the 'Instrument #' data if the record in your file contains data in the 'Old Instrument #' field.
- ✓ Index files must have Column headers, separated by a delimiter. Although optional fields can be included as specified at the end of this document, only the fields marked required are mandatory.
- ✓ Date Format should be 00/00/0000. Dashes cannot be used in Date fields.
- ✓ Open new instance of the Image Batch program each time you need to run a new import process.
- ✓ Grantor, Grantee – type field should contain a value of are "R" or "E"

Grantor, Grantee Name field length =50
- ✓ If the records do not contain a valid instrument number then a 'Book and Page' field may contain some identifying data for the record. An example of this would be to include a column identified with a column header of OldInst (or something similar) and data such as "BK1 PG2"
- ✓ Records containing Images with any "old instrument data" (i.e. Book and Page), need to use the Import Images and Recording Index option. Do not use the Import Images only option.
- ✓ If importing images with any "old instrument data" it is required to have a Recording data Index file.
- ✓ After importing the Recording index data and the images, you may import Grantor/Grantee data as a second step.

Recording data Index File - Minimum required fields contained in the index file is an *Instrument Number* field, *Image Name* field all other fields are optional. The data contained in the Image Name field must be the same as the actual Image file name including the extension. Do not include the file path in the name. There is a separate field that may contain the image file path if it is located in a subdirectory. If the Old Instrument field is used then it is recommended that the instrument number field contain a 0 (zero), the Instrument field cannot be blank.

Recording Index File Layout:

Field Name	Field Type	Field Length	Field Description	Required
[INNUMB]	Numeric	7,0	Instrument Number	Y
[INDATE]	Datetime		Instrument Date MM/DD/YYYY	N
[INDELD]	Datetime		Delivered Date MM/DD/YYYY	N
[INFEE]	Numeric	9,2	Instrument Fee	N
[INDLVD]	Char	30	Delivered Name	N
[INDADD]	Char	30	Delivered Address	N
[INDCTY]	Char	25	Delivered City	N
[INDSTA]	Char	2	Delivered State	N
[INDZIP]	Char	10	Delivered Zip	N
[INDES1]	Char	140	Instrument Description	N
[INPAGS]	Numeric	3,0	Number of Pages	N
[ITTSCD]	Char	6	Instrument Type Code	N
[INOLDI]	Char	30	Old Instrument Number (i.e. book and page)	N
[INSEC]	Char	4	Instrument Section	N
[INTWN]	Char	4	Instrument Township	N
[INRNGE]	Char	4	Instrument Range	N
[INQSEC]	Char	2	Instrument Quarter Section	N
[ImagePath]	Char	100	Path to Image (i.e. C:\temp\images\subdir1..)	N
[ImageName]	Char	50	Image File Name with Extension (i.e. 1234.tif)	Y

Grantor/Grantee data Index File - Minimum required fields contained in the index file is an *Instrument Number* field, *Name Type* field and *Full Name* Field. *Old Instrument* is optional. If the Old Instrument field is used then it is recommended that the instrument number field contain a 0 (zero), the Instrument field cannot be blank.

Field Name	Field Type	Field Length	Field Description	Required
[INNUMB]	Numeric	7,0	Instrument Number	Y
[GGNAME]	Char	50	Grantor/Grantee Full Name (Last, Fist Middle)	Y
[GGSTAT]	Char	1	Grantor = "R", or Grantee = "E"	Y
[INOLDI]	Char	30	Old Instrument Number (i.e. book and page)	N

Install:

Run setup.exe file:  setup.exe

Follow the Installer steps.

Select a path that will be accessible by all users running the Index Import.

If installing on a server or common drive, select to install for *Everyone*.



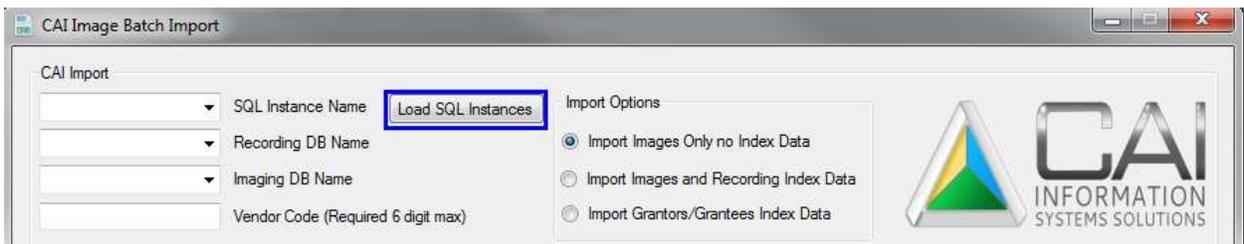
Running Software:

-  Database Permissions – The user running the Index Import must have the necessary user rights and permissions to Read/Write to the existing SQL database and create a SQL database table, and Backup the database.

Import Options:

- **Import Images Only no Index Data** – For importing images only, the Image file name must be the Instrument number. Example: (1234.tif where 1234 is the Instrument Number)
Do not use this option if you wish to import images that have an Old Instrument no. (Book and Page no.)
If the instrument no. exists in Recording, it will import the image to that instrument or append to existing images on that instrument. If the instrument number does not exist, it will create a new instrument with that number and add the image to the instrument.
- **Import Images and Recording Index Data** -Use this option to import Recording Index data and Images.
This does not import Grantor/Grantee fields that is step 2 or the option to import Grantors/Grantees Index Data.
This option should be used when you have index data that you wish to create with the new instrument numbers such as images with any “old instrument number” data. If there is an Old Instrument number specified, the import will create a new automatic Instrument number and add the “Old Instrument” number data to it along with any other index data specified per the file specifications. In the case where an instrument number already exists in the Recording system, no index data will be imported just the actual image file will be imported and appended to the record.
- **Import Grantors/Grantees Index Data**-Use this option to import data only of Grantor/Grantee's. This step may be done to import additional grantors/grantees to existing instrument numbers or as a second step to the import recording index data option. The instrument numbers must already exist in the Recording system. If the instrument number or “Old Instrument Number” if specified do not exist the index record will be logged and skipped.

Open CAI INDEX IMPORT
Complete Fields:

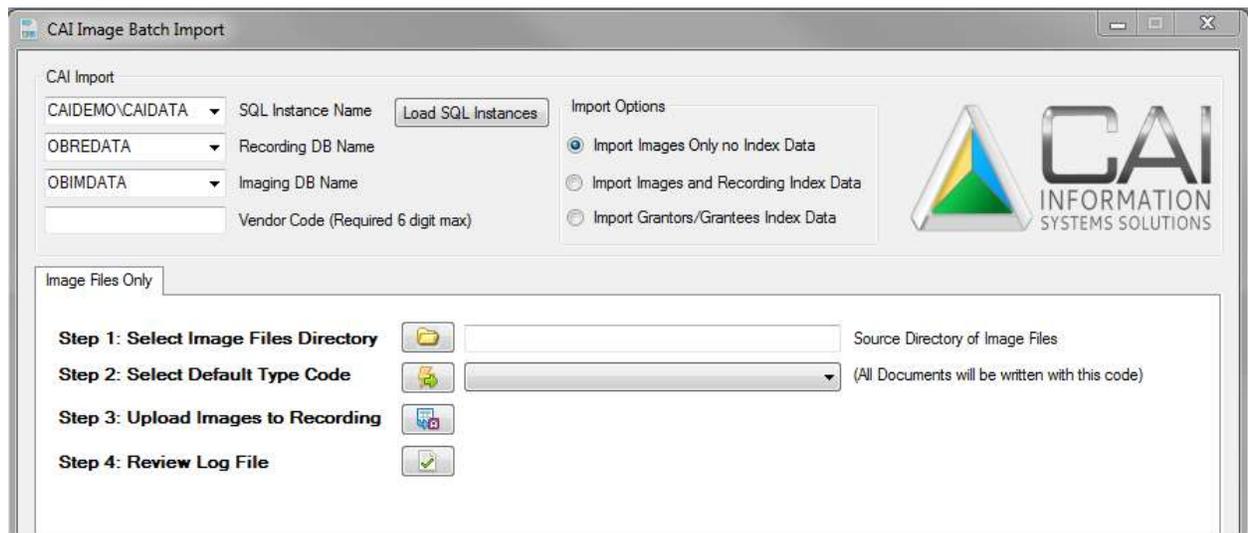


- 1] Select [**Load SQL Instances**] button: This searches this computer for all SQL databases
- 2] **SQL Instance Name** - SQL server name\CAIDATA
- 3] **Recording DB Name** – SQL database where CAI Recording database is (*obredata*), where you will import.
- 4] **Imaging DB Name** – SQL database where CAI Imaging database is (*obimdata*).
- 5] **Vendor Code** – Input a code the represents the vendor doing the Import. (Limit 6 characters)
 (This appears as the 'Operator ID' in the instrument.)

Import Options: select

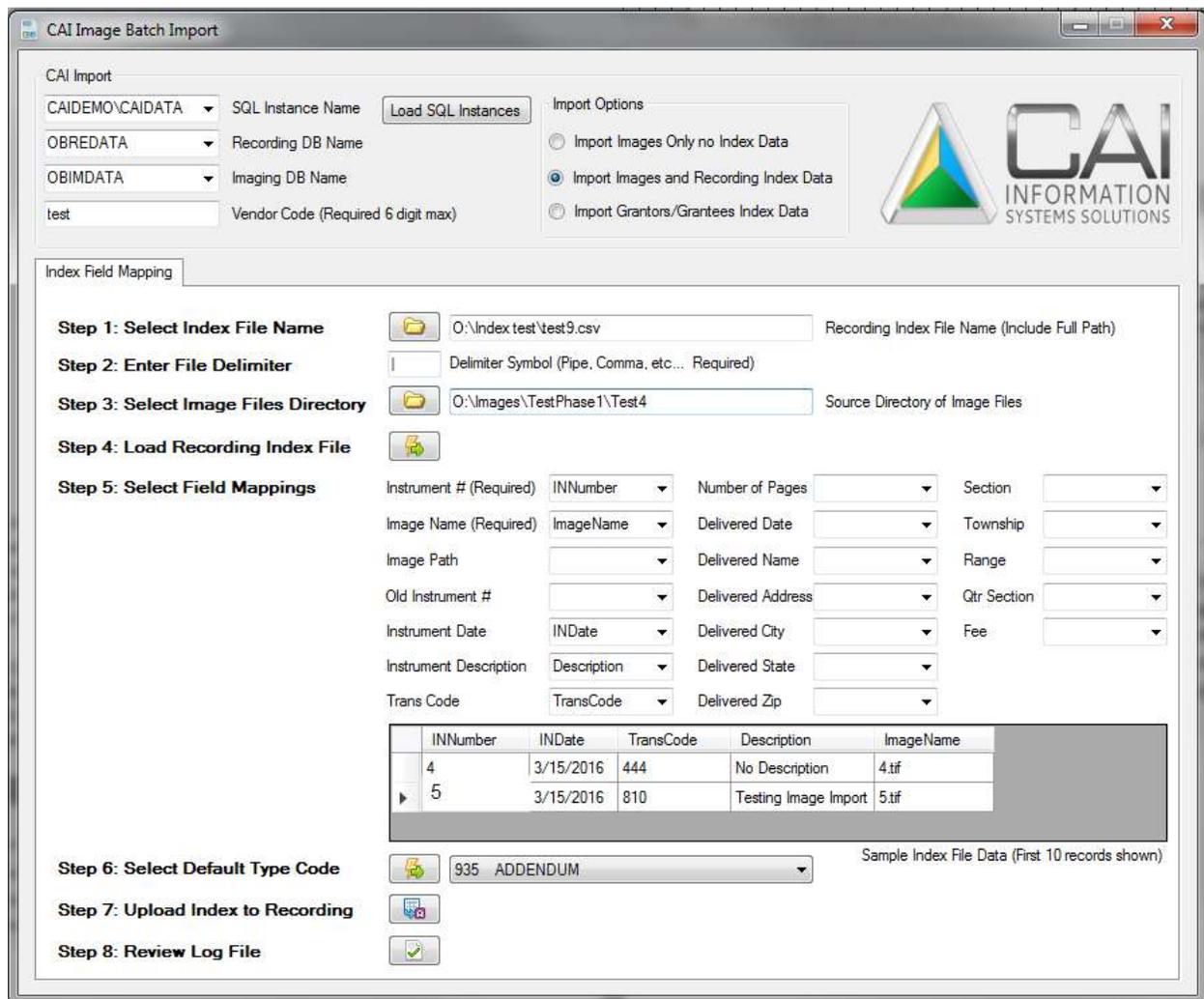
Import Images Only or) *Import Images and Recording Index Data* or) *Import Grantors/Grantees Index Data*

- **Import Images Only no Index Data option**



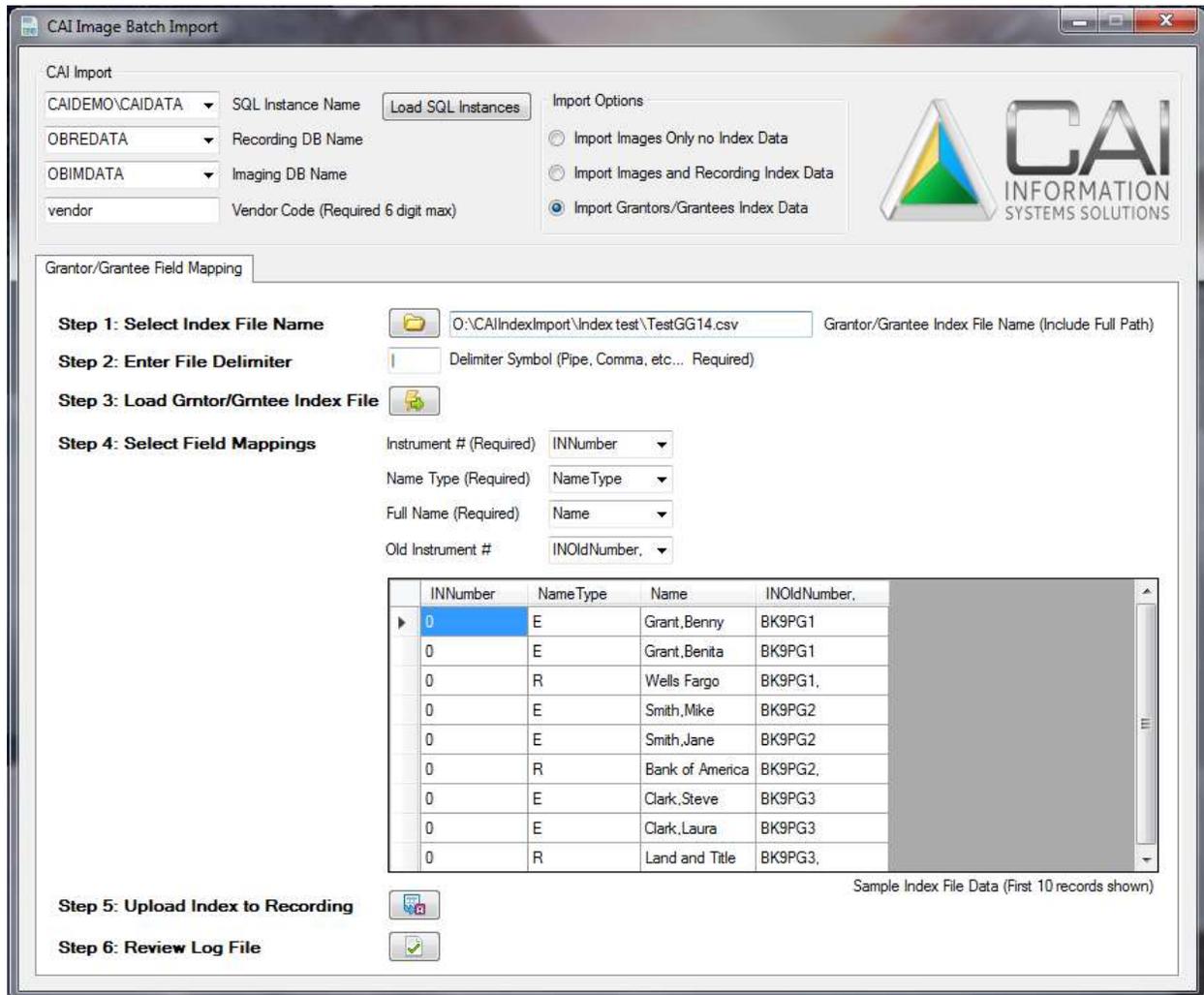
- Step 1: Select Image File Directory** Browse for directory folder containing the Images to be imported.
- Step 2: Select Default Type Code** Default Transaction Code. Select button to view list of available codes in the Recording System. This will be used as a default for all imported images.
- Step 3: Upload Images to Recording** Process uploads images to Recording.
- Step 4: Review Log File** Displays Log file. If errors occur, review errors.

○ **Import Images and Recording Index Data *option***



- Step 1: Select Index File Name** Browse for the Recording Index data File
- Step 2: Enter File Delimiter** '|' (*Delimiter used to separate data fields in file.*)
- Step 3: Select Image Files Directory** Browse for directory folder containing Images to be imported.
- Step 4: Load Recording Index File** Opens and loads Index data file. If errors occur, review errors. See [Review Log File](#).
- Step 5: Select Field Mappings** Map the field names contained in your index data file to the Recording System data fields. Verify 'Required' fields.
Note: **Image Path** field is used only for specifying a Sub-directory, (within the directory specified in the Image File Name or Index File Directory.) If you are using a sub-directory an example of the data in this field would be (C:\images\subdir1\subdir2... a slash (\) should not be included the end.
- Step 6: Select Default Type Code** This will be the default Transaction Code to be applied to instruments that do not have a *Trans Code* specified in index data. Select button to view list of available codes.
- Step 7: Upload Index to Recording** Process uploads Index File into Recording with corresponding Images.
- Step 8: Review Log File** Displays Log file. If errors occur, review errors.

○ **Import Grantors/Grantees Index Data option**



- Step 1: Select Index File Name** Browse for Grantor/Grantee Index Data File.
- Step 2: Enter File Delimiter** '|' (Delimiter used to separate data fields in file.)
- Step 3: Load Grntor/Grntee Index File** Opens and loads Grantor/Grantee Index data file.
If errors occur, review errors. See [Review Log File](#).
- Step 4: Select Field Mappings** Map the fields shown in your index data file to the Recording system data fields. Verify 'Required' fields.
- Step 7: Upload Index to Recording** Process uploads Grantor/Grantee Index File into Recording to corresponding images.
- Step 8: Review Log File** Displays Log file. If errors occur, review errors.