

AIM for Windows[®]

Management Console Setup

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propertyinfo

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Management Console Setup

Access to the Setup screen is controlled by an AIM job title. Only employees with the job title Mgmt Console Setup can Setup.

Setting Up Management Console Options

Before you begin using the Management Console, complete the following setup tasks.

The screenshot shows the 'Setup' window with the following sections and fields:

- Options:** Refresh Minutes (5), Directing Customer (1), Hide Empty Detail Columns (checked), Files By Status Tab Enabled (checked), Reports (Date Range) Tab Enabled (checked), Reports (Analysis) Tab Enabled (checked).
- Licensed Counties:** Hamis, Midland. Buttons: Add, Del.
- Today's Activity Tab:** Excluded Order Types, Excluded Transaction Types. Buttons: Add, Del.
- Premium HUD Lines:** 1104, 1109, 1110. Buttons: Add, Del.
- Files By Status Tab/New Files:** Excluded Order Types (Base File, Escrow Only, Test/Training File), Excluded Transaction Types (Non-Policy, Subdivision Base), Cutoff Days (90). Buttons: Add, Del. Include All Counties (checkbox).
- Files By Status Tab/Pending Files:** Excluded Order Types (Base File, Report Only, Test/Training File, Title Only), Excluded Transaction Types (Subdivision Base), Cutoff Days (365). Buttons: Add, Del. Include All Counties (checkbox).
- Files By Status Tab/Closed Files:** Excluded Order Types (Base File, Escrow Only, Report Only, Test/Training File), Excluded Transaction Types (Non-Policy, Subdivision Base), Cutoff Days (120). Buttons: Add, Del. Include All Counties (checkbox).
- Turntime:** Business Hours Per Day (9), Title Rpt Name (Title Report), Cutoff Days - Title Rpt/Cmt (45), Title Rpt Form (HUD Signature Adder), Cutoff Days - Policy (120), Commitment Form (Comm Sch C). Checkboxes: Use Title Rpts, Filter 'A' Files, Filter Out-of-County Files, Filter HOI Files, Use TVI Filter, Filter Non-Subdivided Files.
- Hidden Escrow Units:** Empty list. Buttons: Add, Del.
- Prep By RPC:** Title Report, Commitment, Policy (checkboxes).
- Included Prop Types:** Multi-Unit Dwelling 2-4 Units, Single Family Dwelling. Buttons: Add, Del.
- Included Trans Types:** Empty list. Buttons: Add, Del.

Steps

1. In the **Options** section, complete the applicable fields:

Refresh Minutes—Type the number of minutes after which the Today's Activity tab will refresh. The minimum value is 3.

Directing Customer—Type the record number of the directing customer entry on the Customer tab in AIM Order Entry. This entry is used by Directing and Emerging Customer reports on the Reports (Analysis) tab.

Hide Empty Detail Columns—When selected, detail screens automatically drop columns that do not contain any data.

Files By Status Tab Enabled—Clear to disable the Files By Status tab.

Reports (Date Range) Tab Enabled—Clear to disable the Reports (Date Range) tab.

Reports (Analysis) Tab Enabled—Clear to disable the Reports (Analysis) tab.

2. In the **Licensed Counties** section, create a list of counties in which the title agent is licensed:

Use the **Add** and **Delete** buttons to create a list of counties in which the title agent is licensed. This list is used by the Files By Status tab to filter out orders that are not in licensed counties.

Tip: You can also disable this feature by selecting the **Include All Counties** option.

3. In the **Hidden Escrow Units** section, edit the Escrow Unit list:

Use the **Add** and **Delete** buttons to edit the list. Escrow Units appearing in this list are hidden on the **Today's Activity** tab.

4. In the **Prep By RPC** section, select the applicable options:

Select the applicable items that are prepared by an Regional Production Center (RPC) in a separate AIM database. When you select an option, the applicable Files By Status and Turntime reports are disabled.

5. In the **Premium HUD Lines** section, create a list of HUD lines:

Use the **Add** and **Delete** buttons to create a list of HUD lines used for the collection of title insurance premiums. These entries are used to determine if a file has funded.

6. In the **Turntime** section, complete the applicable fields:

Business Hours Per Day—Type a numeric value (a decimal is permitted).

Cutoff Days – Title Rpt/Cmt—Type the number of days after which a file will be filtered out of Title Report and Commitment turntime reports.

Cutoff Days - Policy—Type the number of days after which a file will be filtered out of Policy turntime reports.

Title Rpt Name—Type the display name for Title Reports (or the equivalent form).

Title Rpt Form—From the list, select the form to be used for tracking turntime for Title Reports.

Commitment Form—From the list, select the form to be used for tracking turntime for Commitments.

Use Title Rpts—Clear if Title Reports (or an equivalent form) are not used.

Filter A Files—When selected, **A** files are not be included in turntime reports. An **A** file is a sub-file, which has a corresponding file without the letter **A** appended.

Filter Out-Of-County Files—When selected, turntime reports do not include files that are not entirely within licensed counties.

Filter HOI Files—When selected, policy turntime reports do not include Home Office Issue files.

Use TVI Filter—When selected, date/time stamps for Title Report and Policy production are discarded if the multiline element **Title Vested In** is not populated. This can help prevent inaccurate turntime calculations resulting from erroneous production of incomplete documents.

Filter Non-Subdivided Files—When selected, turntime reports do not include files that have legal description entries on the Abstract or Township tabs in AIM Order Entry.

Included Prop Types—Use the **Add** and **Delete** buttons to create a list of Property Types to be included in turntime reports.

Included Trans Types—Use the **Add** and **Delete** buttons to create a list of Transaction Types to be included in turntime reports.

Note: If this list is left blank, all Resale Transaction Types are included.

7. In the **Today's Activity Tab**, complete the applicable fields:

Excluded Order Types—Files with Order Types appearing in this list are excluded from the **Today's Activity Tab**.

Excluded Transaction Types—Files with Transaction Types appearing in this list are excluded from the **Today's Activity Tab**.

8. In the **Files By Status Tab**, complete the applicable fields:

Excluded Order Types—Files with Order Types appearing in this list are excluded from the **Files By Status Tab**.

Excluded Transaction Types—Files with Transaction Types appearing in this list are excluded from the **Files By Status Tab**.

Cutoff Days—Type the number of days after which a file will be filtered out of the applicable Files By Status report.

Include All Counties—When selected, the applicable **Files By Status Tab** do not filter files in unlicensed counties.