

Online Submission Tool: Common Elements

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Revision History

Version #	Revision Date	Summary of Changes	Pages Changed

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Overview

This module will provide you with a basic understanding of the Online Submission (OLS) tool and provide specific information on elements common to all areas of the tool.

Objectives

As a result of this module you will:

- Understand the technology requirements to use the OLS tool.
- Understand how to sign-in to the OLS tool.
- Have a basic understanding of the Transaction types.
- Understand the elements that are common to all areas of the OLS tool including validation errors, templates, searching for titles, and creating and using client entities.

What Is OLS?

Online Submission (OLS) is a highly efficient and interactive packet preparation alternative to the forms-based method of submitting applications to the Land Registry.

OLS is available to anyone with a LAND System account and provides customers opportunities to reduce the amount of manual data entry, validate information prior to submission, and manage personal workflow.

Note: Packets are still submitted for examination by a title processor, but OLS helps ensure that all the required information is included and valid before the packet is submitted.

OLS

Information that is commonly required is presented along with a link to the full details if that information is necessary.

Interest No.	Holder/Owner	Title No.	Reference Land Description
200018887	T&D Incorporated	200029744	SE 22 62 30 3 Ext 0 As described on Certificate of Title 400001388.
200018898	T&D Incorporated	200029755	SE 22 62 30 3 Ext 0 As described on Certificate of Title 400001388.
200018900	T&D Incorporated	200029766	NE 22 62 30 3 Ext 0 As described on Certificate of Title 400001388.
200018911	T&D Incorporated	200029777	NE 22 62 30 3 Ext 0 As described on Certificate of Title 400001388.

The above is an example of the results screen that the system will display. If you need more information, click on the hyperlink to reveal additional details as illustrated below.

	Land Description Owners Titl		Title	e No.	Shar	e Last Amendment Date	Parcel	Parcel Type	Municipality	
	SE 22 62 30 3 Ext 0 As described on Certificate of Title 400001388.		Tauxalot, Paul	200 \$	029744 🗐	1 / 2	04-Dec-2001 16:02:58.890	100894608	Surface Regular	UNKNOWN
	Ties Validated Ties		Commodity / Unit		Linked To Unit Old Land Description		Title Lock Information			
			Not Applicable	N/A						
	Land Description	1	Owners	Title	e No.	Shar	e Last Amendment Date	Parcel	Parcel Type	Municipality
	Land Description NE 22 62 30 3 Ex described on Cel 400001388.	dt 0 As				Shar 1 / 2		100894619		Municipality UNKNOWN
	NE 22 62 30 3 E described on Ce 400001388.	ct 0 As rtificate of Title		200 \$		1 / 2	04-Dec-2001 16:03:05.903	100894619	Surface Regular	

Benefits and Features of OLS

- Reduced Packet Rejections
 - Real-time feedback on data entered into system.
 Validation of packets before
 - Validation of packets before they are submitted which ensures that all required data (nine digit numbers, etc.) are

•

entered and authorizations and attachments are included in your packet.

Note: This does not ensure that your authorizations and/or attachments are completed accurately.

Save Time	
0	Create customized templates
	for re-use in common
	transactions.
0	Real-time access to
	information to compile your
	transaction.
0	Edit, organize, and store work
	already created within the
	OLS Tool.
0	Upload, fax, or mail
	authorization and attachment
	documents which may be
	stored securely in your
	personal My OLS Documents
	area.
0	Carries forward previously
	entered data so you don't
	have to re-enter it.

Technical Workstation Requirements

You will need the following regardless of your computer's configuration:

- Browser: Internet Explorer 5.5 or higher
- Screen Resolution: 1024x768 or higher
- Additional Software: Adobe Acrobat Reader

The minimum requirements you will need:

- Operating System: Windows 2000, Windows XP (Home or Professional), Windows Vista
- Processor or CPU
 - o Intel: Pentium 2
 - o AMD: K5
- RAM Memory

0	Windows 2000: 128 MB

- o Windows XP: 256 MB
- Windows Vista: 512 MB
- Internet Download and Upload speed of 256 kb/s
- Fax machine to upload Authorizations and Attachments

For optimal performance, you will have following or better:

- Operating System: Windows XP (Home or Professional), Windows Vista
- Processor or CPU

0	Intel: Pentium 4, Celeron,
	Viiv, vPro, Centrino, T, M,
	Duo, Xeon
0	AMD: Athalon, K7, Athalon
	64, Opteron
_	

RAM Memory

Windows 2000: 128
 MB
 Windows XP: 512
 MB

December 2012

• Windows Vista: 1 GB

- Internet Download and Upload speed of 512 kb/s
- Scanner to upload Authorizations and Attachments

Note: Details to identify the properties on your system may be found in the **OLS Technical Requirements Guide** found by clicking the **Help** link at the top of the OLS Home page.

File Uploads

When you submit most packets you also need to include additional documents that may be uploaded to a secure area on ISC's system that is only accessible with your client number and password.

You may add your documents at different points in the process. For example, you may:

- Upload a document from your PC or network any time after creating the packet (the packet must be created before you can add authorizations or attachments to it).
- Fax or Mail in documents using the Fax or Mail-In cover page feature.
- Use the My OLS Documents area to store and retrieve documents that are regularly used across packets.

The following guidelines exist for uploading documents to ISC:

- Maximum file size for an uploaded file will be 8Mb
- Scanned files in black and white files at 200x200 are smaller files than color scanned files that will take longer to upload.
- Valid files that will be accepted:
 - Word (*.doc) Office95, Office97, Office2000, OfficeXP, Office2003
 Acrobat PDF (*.PDF) – 1.0 to 1.4
 Tiff (*.TIFF)

Getting Started

Sign-In and Access

In order to access the Online Submission Tool you must have an existing LAND Application username, password, client number, and account. The user first signs-in to the LAND Application and then clicks the Online Submission link to access the OLS tool.



You may sign-in to the LAND Application by clicking the **Sign-in** area on the right-hand of the screen.

At a minimum, you must enter your user name, password, and client number. If you only have one account tied to this client number, you do not need to enter it as the system will know that is the only account that can be charged. If you have multiple accounts, enter the account number and password you will be charging your work against. These may be changed on individual packets if you wish to charge a packet to a different account.

Accessing OLS

	(IT) Information Services Corporation			Text Size Normal	About ISC	
	Corporation			Search		
	🖌 Forms Help Fe	es Products	Signed In: train50	Client # 400031930 Sign Out My	Account	
	ISC Signed in Home			🚍 Panter Feendy		
	Online Services	Canada's New West Partners	New West Partnership Str Registration Across the W			
	Land Registry Online Submission (QLS)		New West Partnership will streamline t		ist.	
	+ Map Search					
	Quick Search		Annual Contraction of the Contra			
	* Search					
	Grant Search	Trying to stay up to date i	with what's happening at ISC?	Sign up for email update	13. 1	
	General Record Search			18	100	
Contraction of the second	Packet Quick Check	Don't need to see all of th	a name?	Customize your news pa	100	
17 E M.	Packet Detailed Check	ben there to see an or o		Gustomize your news pa		
S. Carl	Image Request Search Survey Plans Plan Search	Land Registry, Onl	ssion enhanced to provide impro- line Submission Sep 28-12		1	
N/1 $+$ $+$ $+$ $+$ $+$ $+$ $+$ $+$ $+$ $+$	Change Order Search	implemented on Sec	nounce that several minor enhancements to stember 27, 2012.	Online Submission (OLS) were	9 C	
COLOR N	Support Document Search		ks to prevent title fraud		13	
	· Field Book Search	Corporate News, L	and Registry Aug 8-12		- M.	
	Request Status Check	Learn how we help p	prevent title fraud and what we can do to fix so	ome of the damages caused by title	fraud.	
	Personal Property Registry SPPR Application	Corporate News	ousiness under the New West Pa Jul 23-12 hig extra-provincial business registration now		- 90	
	Judgement Registry Judgment Search	New money ju	udgment enforcement legislation Inline Submission, Land Registry, Saskat	now in effect	itry	

Once you have successfully signed-in to the LAND Application, a link to **Online Submission (OLS)** is located along the left-hand side of the page. Click this link to access the OLS tool.

If you have successfully signed-in, the system displays the OLS Home page illustrated below.

Inform Service Corpora	ation stion OLS Online	Submission Tool	ISC Home Authorizations Affidavits Legal Help Si
OLS Home	Packet Mgmnt Transfe	rs Interests Transforms	and the second
LS Home			
earch			Hide this section S
earch By	Land Description	Client Reference:	LAND Full Sea
	I (i.e. Section, Township, Range In (i.e. Lot, Block, Plan) combination)) Quarter Legal Sub Division: Quarter Section: Township*: Meridian*:	Legal Sub Division:
indicates a Re	quired field		
Return all ti for more detail Land Descript	ed information about this option	, please click <u>here</u> .	Search
1 3,	Alerts No alerts at this time.		
	OLS News		
	Online Submission enhant ISC is pleased to announce	ced to provide improved online experience that several minor enhancements to Online Submi	ssion (OLS) were implemented on September 27, 2012.
	ISC making changes in re Find out what we are doing t	esponse to new debt enforcement legislation o help support a new provincial act expected to co	me into effect on May 28, 2012.
	Mew Field in OLS As of March 5, you will see a	slight addition to the Interest Registration and Inf	erest Amendment screens in Online Submission.
	Manual Improvements made to c Now you can specify a cond	nline submission method ominium unit number when registering an interest	against a condo title.

Reference

The Online Submission tool is broken down into several components that are accessed through navigational tabs located on each page. A list of the OLS Tabs is as follows:

- OLS Home
- Packet Management
- Transfer
- Interests
- Transforms

Detailed information on packet management and the different transactions is located in separate modules.

This module focuses on a number of elements that are common to all areas of the OLS Tool. It also includes information on general components of the system.

OLS Home Page

The OLS Home page is the first page the system displays when you click on the **Online Submission (OLS)** link. Once you have opened the OLS application, you may also access the home page at any time by clicking the **OLS Home** tab.

Note: If you are working on a transaction, be sure to save your work before clicking on the OLS Home tab to prevent loss of work.

The OLS tool provides a number of functions and features on the Home page as described below.

Information Services Corporation

(J.T) Informa Services Corporati		Submission T	ool	<u>ISC Home</u> <u>Authorizations</u>	<u>Affidavits Legal</u> <u>Help</u> <u>Sic</u>
OLS Home	Packet Mgmnt Transf	ers Interests	Transforms	and made the Constant of the second of the	a shake was the state
LS Home					
earch					Hide this section 🛛
earch By	Land Description	Client Referer	nce:]	LAND Full Sear
	(i.e. Section, Township, Ran	ge) Quarter Legal Sub (Division:	Legal Sub Division:	
Other (any co	n (i.e. Lot, Block, Plan)	Quarter Section:		Section*:	
Jother (any of	ombination)	Township*:		Range*:	
		Meridian*:		Extension:	
indicates a Rec	quired field				
Land Descriptio	Alerts				Search
	OLS News				
	Online Submission enha ISC is pleased to announc	nced to provide improv e that several minor enl	<u>ed online experience</u> nancements to Online Sub	mission (OLS) were implemented o	on September 27, 2012.
	ISC making changes in Find out what we are doing	response to new debt e to help support a new	nforcement legislation provincial act expected to	come into effect on May 28, 2012.	
	Mew Field in OLS As of March 5, you will see	a slight addition to the	Interest Registration and	Interest Amendment screens in Or	line Submission.
	Mow you can specify a con	online submission meth dominium unit number	n <u>od</u> when registering an intere	st against a condo title.	

- There are links to the ISC Home page, Authorizations and Affidavits, Legal, Help, and a link to Sign Out.
- There are Tabs to create or continue working on title transfer transactions, interest transactions, and transform transactions.
- The ability to perform a title quick search.
- There are sections that provide Alerts, OLS News, and OLS Notifications.

Each section will be described in more detail later in this module.

Home Page Links

The top right-hard corner of the Home page contains five hyperlinks. These links are used to provide information.

| ISC Home | Authorizations | Affidavits | Legal | Help | Sign Out

- The ISC Home link will take you to the ISC Signed-In Home page.
- The Authorizations and Affidavits links will take you to the page that houses all the necessary authorization and affidavit documentation you will require for your transactions.
- The Legal link will take you to the page that houses information as to the policies and practices ISC follows to manage your personal information.
- The Help link will take you to the page that houses Online Submission help. This is described in more detail later in this module.
- The Sign Out link will take you out of the OLS system and back to the Sign-In Home page.

Alerts

This area provides information on system downtimes or upcoming system changes. The area will be blank if there are no alerts.



OLS News

This area provides News about software or functional changes to the OLS system. The area will be blank if there is no news.

News items appear in this area as "briefs." To see the detail on any News item, click the hyperlink and it will appear in a new window.



OLS News

ISC making changes in response to new debt enforcement legislation Find out what we are doing to help support a new provincial act expected to come into effect on May 28, 2012.
Hew Field in OLS As of March 5, you will see a slight addition to the Interest Registration and Interest Amendment screens in Online Submission.
Improvements made to online submission method Now you can specify a condominium unit number when registering an interest against a condo title.
More Improvements Made to OLS Find out how recent changes to OLS will help reduce packet submission errors.
Upgrades to <u>OLS Should Result in Fewer Packet Errors</u> Learn about how we are improving OLS to better meet your needs.
Important Update on Printing Issues ISC is aware that customers are experiencing issues with printing search results from Land Registry. Writ Registry and Survey Plans searches. We are working hard to resolve this issue fully, and in the meantime have posted a temporary "Alternate Print" link to affected pages that will allow you to successfully print your results. Read on for step-by-step instructions.
Wrongfully <u>Rejected Packets Will Now Get Top Priority</u> Learn what changes are in store for dealing with packets that were rejected in error.
System outage scheduled for April 30 Find out what's happening to improve ISC's online presence.
In the second

OLS Notifications

This area provides information about work in progress. Certain functions in the OLS system are performed in the background. When the function has completed, the system notifies you in this area.

The list of possible notification messages is as follows:

- Authorization and/or Attachment documents sent to ISC via Fax or Mail have been received and are ready to use.
- Authorization and/or Attachment documents sent to ISC via Fax or Mail that cannot be attached to the packet.
- An uploaded Authorization or Attachment document contained a virus.
- A Submitted packet passed or failed submit validation.
- A Draft packet will expire soon.
- The Summary Report or Packet Print Request that you created is ready to view.

_	Notifications ⑦	Details	Delete
		Text Packet 200080471 has failed validation:	s.

The notification can be opened to see more detail. In some cases, the detailed notification includes a hyperlink that opens the packet associated with the notification.

To see more detail for a notification:

- Click the check box to the left of the notification you want to view.
- Click **Details**. The notification details display in a new window.

Notifications will automatically expire and be deleted after one month or you may delete them by clicking the check box to the left of the notification(s) and then clicking **Delete**.

Note: If ISC has an email address on file for the client number you used to sign in, a copy of each notification will also be sent to that email address.

Email Notification System

You may also receive notification of changes to the OLS Tool using ISC's Email Notification System (ENS). There are several options that allow you to tailor the emails so that you only receive information on your areas of interest. See the ISC website and sign up today.

Online Help

There are four ways you can get help within the OLS tool:

- General Help which is available by clicking the **Help** link at the top of every page.
- Transaction Specific Help which will take you to a contextually specific area within the help files based on the page you are on at the time.
- Field Level Help which can be accessed by clicking on the question mark icon to find out more information on a particular field or task button.
- Error messages that will be returned to you after clicking Validate or Submit if you have provided data that is either inaccurate or that does not exist in the database.

OLS General Help

| ISC Home | Authorizations | Affidavits | Legal | Help | Sign Out

Clicking on the **Help** link will open the top level Help page. Help information is presented in a hierarchical fashion and provides the ability to click on links and "drill down" to get more detail. The lefthand side of the screen includes links for other Land Registry areas. The top right-hand corner of the screen includes a printer-friendly link to **Print** current pages.

Application Specific Help

Application specific help is available for packet management, transfers, interests, and transforms. Click the link located on the right-hand side of each Tab Header Bar to access application specific help.

Information Services Corporation OLS Online S	Submission Tool	ISC Home Authorizations Affidavi	<u>is Legal Help Sign Oc</u>
OLS Home Packet Mgmnt Transfer	s Interests Transforms	Carden all and a server and a	and the second states of the
			Transfers Hel
Transfers - Change of Ownership			
Search			Hide this section 🖬
Search By Land Description	Client Reference:		LAND Full Search
• Typical Rural (i.e. Section, Township, Range)	Quarter Legal Sub Division:	Legal Sub Division:	_
O Typical Urban (i.e. Lot, Block, Plan) O Other (any combination)	Quarter Section:	Section*:	
	Township*:	Range*:	
	Meridian*:	Extension:	
* indicates a Required field			
Return all titles			
For more detailed information about this option,	please click <u>here</u> .		
Land Description Help ⑦		Search	

The Help Content is specific to each Tab. Help information is presented in a hierarchical fashion and provides the ability to click on links and "drill down" to get more detail. The left-hand side of the screen includes links to other areas of the system.

Field Level Help

Throughout the OLS tool you will see a question mark icon. This indicates there is help information available for that specific field.

Select the question mark help icon to view instructions or descriptions that will assist you in completing your transaction. For example:



ISC Support - Add to My OLS Docs

Add to My OLS Docs

"My OLS Docs" is a storage area that allows the user to store and use documents previously used in another packet as an authorization or attachment for the packet or application that they are currently working on.

It is similar to a "favourites list" for documents that will be re-used as an authorization or attachment for more than one packet.

To add a document to "My OLS Docs", simply upload the document in question to the current application or packet and select the appropriate document by checking the "check box" and clicking "Add to My OLS Docs".

A confirmation message stating the following will ensure that your document was successfully added to "My OLS Docs":

"Informational: The File "Insert Filename" has been added to your My OLS Documents list successfully."

Error Messages Help

The OLS tool provides the ability to validate information once it has been entered into a transaction. When **Validate** is clicked, the system goes through a series of checks. If errors or warnings are encountered the system will provide a message that includes information on how to resolve the error.

e-Learning Tutorials

The e-Learning tutorials consist of 13 web-based modules that show you how to use the Online Submission (OLS) tool. When you are signed into the ISC website, these tutorials are located under the Training section of the Help tab. Click the **Online Submission** link (it is the last link found under the Online Submission Help heading. This site also provides you with a **User's Manual** link that houses step-by-step learning modules in PDF format that you may view, print and save to your hard drive if you choose. You may want to print this module to use as a resource while taking the e-Learning tutorials. Note: The eLearning tutorials may also be accessed using the following path: Forms > Training Registration > training opportunities.

Transaction Tabs

The various transactions that the OLS Tool allows you to perform are found under the Transaction Tabs. Refer to the corresponding module for details on conducting these transactions.

OLS Home	Packet Mgmnt	Transfers	Interests	Transforms	
	- (
•	Transfers				
		o Ti	o Title Transfer		
		o Tr	Transfer to Surviving Joint		
		Te	Tenant		
		o Tr	Transmission		
		0 M	Mineral Commodity Split		
		o Al	Alternate Authority		
•	Interests	rests			
		o In	terest Registra	tion	
		o In	terest Discharg	e	
		o In	terest Amendn	nent	
		o In	terest Assignm	ent	
		o Ju	Judgement Registration		
•	Transfor	ms			
		o Su	rface		
		0 M	ineral		

Note: Condo Transforms cannot be handled in OLS at this time.

Search Section

The Search section is accessible from the OLS Home page, Transfers tab, Interests tab, and Transforms tab and allows you to locate current title information.

Note: The Search criteria defaults to "Land Description," however, you may also search by "Owner Name," "Parcel Number" or "Title Number."

Search by Land Description

The OLS tool provides the ability to search for titles by Land Description for Typical Rural, Typical Urban, or Other which is any combination of the fields.

Note: When searching by Land Description "Typical Rural" or "Other," you can retrieve all parcels related to the land description, such as Legal Subdivisions and Blocks/Parcels on Plan, by checking the "Return all titles" check box.

Typical Rural

Search			Hide this section 💌
Search By Land Description	Client Reference:		LAND Full Search
 O Typical Rural (i.e. Section, Township, Range) O Typical Urban (i.e. Lot, Block, Plan) O Other (any combination) 	Quarter Legal Sub Division: Quarter Section: Township*: Meridian*:	Legal Sub Division: Section*: Range*: Extension:	
* indicates a Required field			
Return all titles For more detailed information about this option, Land Description Help ⑦	please click <u>here</u> .		Search

- 1. Select Land Description from the **Search By** drop down box.
- 2. Click the **Typical Rural** radio button.
- 3. Enter the relevant land description information into the appropriate fields. The required fields are indicated.
- 4. Click **Search**. The **Search Results** will be displayed.



- 1. Select Land Description from the "Search By" drop down box.
- 2. Click the Typical Urban radio button.
- 3. Enter the relevant land description information into the appropriate fields. The required fields are indicated.
- 4. Click **Search**. The **Search Results** will be displayed.

Other

Search			Hide this section 🔽
Search By Land Description	Client Reference:		LAND Full Search
 ○ Typical Rural (i.e. Section, Township, Range) ○ Typical Urban (i.e. Lot, Block, Plan) ○ Other (any combination) 	Quarter Legal Sub Division: Quarter Section: Township*: Meridian*: River Lot: Street / Lane: Lot: Block: Plan *:	Legal Sub Division: Section*: Range*: Extension: Road Allowance: Unit No:	(Condominiums Only)
* indicates a Required field			
Return all titles For more detailed information about this option, Land Description Help ②	please click <u>here</u> .		Search

- 1. Select Land Description from the "Search By" drop down box.
- 2. Click the Other radio button.
- Enter the relevant land description information into the appropriate fields. The required fields are indicated.
- Click Search. The Search Results will be displayed.

Search by Owner Name

This search allows you to search for titles by the Owner Name. This could be a family name or a corporation name. You may also search for names that are similar in spelling. This search provides an intermediate step. The first results list returned is a listing of names that match the entered criteria. From this list you may select the correct individual or corporation and view all titles for that entity.

Search	Hide this section 😾
Search By Owner Name 💌 Client Reference:	LAND Full Search
O Company Name*:	
• Family Name*: Include names that are similar in spelling	
Given Name:	
* indicates a Required field	
Search Advanced Search	

- 1. Select Owner Name from the "Search By" drop down box.
- 2. Click the radio button for the type of name you wish to search for.
- Enter the name in the appropriate field. Select the "Include names that are similar in spelling" check box if applicable.
- 4. Click Search.

Search	1					H	lide this section 🖬		
Search	h By Owner Name 💌	Client Refe	erence:				LAND Full Searc		
O Company Name*:									
⊙ Family Name*: tauxalot ✓ Include names that are similar in spelling									
Giv	ven Name:								
indica	ates a Required field		Search A	dvanced Searc	n				
							_		
		View All Titles	Prin						
Sear	rch Results 4 Record(s) Found	VIEW AIT THES		1	Close				
Sear		VIEW ALTERS		1	Close		_		
Sear	Owner Name	Client Number		Mailing Add					
Sear				Mailing Add	ess	le, Saskatchewan, Canada	-		
	Owner Name	Client Number	Client Type	Mailing Adds	ess ring Lane, Smallvi	le, Saskatchewan, Canada le, Saskatchewan, Canada			

- 5. The name search results display. Use the scroll bar to see all the results.
- 6. Click the radio button beside the appropriate name.
- Click View All Titles. The Search Results will be displayed.

NOTE: An advanced search option is also available when searching by Owner Name. Click on the link and the system displays the screen illustrated below. Entering information into the Advance Search fields further limits the search results. Enter information into any or all of the fields and click **Search**. You will need to make sure that the information that you are entering in the Advanced Search field is accurate; otherwise you may end up with no (or incorrect) results.

(FT) Information Services OLS Online Submission Tool	ISC Home Authorizations Affidavits Legal Help Sign Ol
OLS Home Packet Mgmnt Transfers Interests Transforms	and a state of the second s
OLS Home	
Search	Hide this section 🗖
Search By Owner Name 💌 Client Reference:	LAND Full Search
Company Name*: Family Name*: Given Name: indicates a Required field	
Advanced Search	
If you would like to further limit your search, please provide any of the following additional	values:
Phone Number Area Code Number e.g. 5551234	
Mailing Address	
P.O. Box / Street:	
City:	
Province:	
Country:	
Deceased / Bankrupt:	
Search	Basic Search

Search by Parcel Number



- 1. Select Parcel Number from the "Search By" drop down box.
- 2. Enter the **Parcel Number**.
- 3. Click **Search**. The **Search Results** will be displayed.

Search by Title Number

 Search
 Hide this section I

 Search By
 Title Number

 Title Number
 Search

- 1. Select Title Number from the "Search By" drop down box.
- 2. Enter the **Title Number**.
- 3. Click **Search**. The **Search Results** will be displayed.

Title Search Results

Se	earch Results - T	itle Information	2 Record(s) Found	Use	Selection in Trans	fer	Use Selection in Interest	Print	Close	
	Land Descriptio	n	Owners	Tit	le No.	Share	Last Amendment Date	Parcel	Parcel Type	Municipality
-	SE 22 62 30 3 E described on Ce 400001388.		Tauxalot, Paul	20 (\$	0029744 🗐	1/2	04-Dec-2001 16:02:58.890	100894608	Surface Regular	UNKNOWN
	Ties	Validated Ties	Commodity / Unit		Linked To Unit	C	Id Land Description	Title Lock In	formation	
			Not Applicable		N/A					
	Land Descriptio	n	Owners	Tit	le No.	Share	Last Amendment Date	Parcel	Parcel Type	Municipality
	NE 22 62 30 3 E described on Ce 400001388.		Tauxalot, Paul	20 \$	0029766 🗐	1/2	04-Dec-2001 16:03:05.903	100894619	Surface Regular	UNKNOWN
	Ties	Validated Ties	Commodity / Unit		Linked To Unit	C	ld Land Description	Title Lock In	formation	
			Not Applicable		N/A					

- 1. Click the check box next to the desired title.
- 2. Click one of the action buttons:
 - The Use Selection in Transfer 0 button moves you to the Transfers Transaction tab and populates the Titles to Transfer section with the selected search results. The Use Selection in Interest 0 button moves you to the Interests Transaction tab and populates the Attach Interest to section of an interest registration with the selected search results. The Print button prints a 0 copy of the search results on your printer. The **Close** button removes 0 the search results from the screen.

Note: If the count shows "0 Record(s) Found," it indicates that there are no title results that match the entered search criteria.

Note: It is important to ensure your browser print setting is set to "Print background colors and images." If these settings are not selected, portions of the screen will not print correctly. To locate this setting in the Internet Explorer browser, select the **Internet Options** item under the **Tools** menu. When the Internet Options

screen appears, click the **Advanced** tab and scroll down to the **Printing** item, click the "Print background colors and images" **check box**, and then click **OK**. You will also need to ensure that your print settings are set to "Landscape" mode or else the report will not print properly.

The Title No. field includes two icons that are hyperlinks. Click the document icon to view the title details. Standard fees apply to access title details. Click the dollar icon to see the fees for viewing title details.

Note: When conducting a title search on the OLS Home page or on the Transfer, Interest, or Transform Tabs of the OLS Tool, you can print the search results grid.

Common Components

Templates

Templates are a convenient tool that assist in completing applications that contain the same or similar information. When you use a template you do not have to enter all of the information in the application each time. A template can include information from any or all the relevant fields. Once a template has been applied to an application, any of the information in that application (except Interest Type in an Interest Registration) may be changed or updated. The updated information can be saved back to the template by replacing the existing template or saving it as a new template.

Templates can save time by allowing you to fill in the appropriate fields and use the information in multiple setups. If you need to setup the same or similar title setup information on multiple items you may use a template. Templates may also be used in other packets.

Note: Each template you create is unique to the client number that you sign in with.

Note: The list of templates displayed is specific to the transaction that you are currently performing.

The system provides the ability to build templates for the following applications:

- Title Transfer setup details
- Interest Registration details
- Interest Assignment details
- Transform setup details

The specific fields that form a template differ between each application type. Any or all of the fields can be included in the template. A description of the fields for each application type is as follows:

- Title Transfer and Transform Setup
 - o Ownership Structure
 - Fractional Title Share
 - o New Title Value
 - o New Owner information (only
 - if an existing ISC client
 - number is used)
 - Conditions of Registration
- Interest Registration

0

- o Interest Type
- Holder's Mortgage or Interest Reference Number
- o Interest Value
- Feature Number
- o Scheduled Expiry Date
- o Description of Interest
- o Conditions
- o Interest Holder Setup

information including:

- Number of
 Shares
- o Fractional Share
- Holder
 information
 (only if an
 existing ISC
 client number is
 used)
- Interest Assignment

0

Interest Holder Setup

- information including:
 - Number of
 Shares
 - o Fractional Share
 - o Holder
 - information
 - (only if an
 - existing ISC

client number is

used)

The four functions that may be performed with templates are:

- Create a New Template
- Apply an Existing Template to an Application
- Replace an Existing Template
- Delete an Existing Template

Create a New Template

This function allows you to save the application information entered into the OLS tool as a template.

Transfer Template

Select Setup Source: Surrendered item 1 - Parcel 1009	03407 💌	Delete Setups	for Selected SourceTitles
Source Title(s) for these setups:			
Title No. Owner(s) Parcel No.			
200040578 Tauxalot, Paul 100903407			
Apply Template/Copy From Previous Setup:		*	Apply
Save Setup Data As Template: 🕐			
Replace existing Template:		~	Delete Template
O Save as new template:			Save Template

- 1. Work through the setup and fill in the fields that will make up the template.
- 2. Scroll back up to the **Template** section.
- 3. Click the "Save as new template" radio button.
- 4. Enter a unique template name.
- 5. Click **Save Template**.

Interest Registration Template

New Interest Setup		Hide all sections 🔽
Apply Template:	×	Apply
Save Interest Registration Data As Template 🕐		
O Replace Existing Template:	▼	Delete Template
○ Save as new template:		Save Template

- 1. Work through the setup and fill in the fields that will make up the template.
- 2. Scroll back up to the **Template** section.
- 3. Click the "Save as new template" radio button.
- 4. Enter a unique template name.
- 5. Click **Save Template**.

Interest Assignment Template

	Interest Number	Attached To	Share Number	Fractiona Shares	Interest Share Holders	
Interests for this setup:	200028934	Title: 200043661	200030184	1/1	EyeSpy Developments	
	200028945	Title: 200043672	200030195	1/1	EyeSpy Developments	
	200028956	Title: 200043683	200030207	1/1	EyeSpy Developments	
	200028967	Title: 200043694	200030218	1/1	EyeSpy Developments	
	200028978	Title: 200043706	200030229	1/1	EyeSpy Developments	
Apply Template:				~		Apply
Save Assignment Data As Temp	ate 🕐					
O Replace Existing Template:				~		Delete Template
O Save as new template:						Save Template

- 1. Work through the setup and fill in the fields that will make up the template.
- 2. Scroll back up to the **Template** section.
- 3. Click the "Save as new template" radio button.
- 4. Enter a unique template name.
- 5. Click **Save Template**.

Transform Template

ect New Parcel:	100900268 Lot 15-BI	k/Par 31-Plan 3	300000058 Ext 0 F	Parcel (Generic) 💌	Delete Setups for Selected Parcel	
urce Title(s) for t	this setup:					
	Parcel: 100900224	Title No.	Owner(s)	Parcel Class Code	Reference Land Description	
		200048251	Blanket, Hank	Parcel (Generic)	Lot 15-Blk/Par 31-Plan 300000047 Ext 0	
	Parcel: 100900257	Title No.	Owner(s)	Parcel Class Code	Reference Land Description	
		200048284	Blanket, Hank	Road Allowance	ORA 124-17 19 2 Ext 0 DESCRIPTION 5	
ply Template/C	opy From Previous	Setup:	[Apply
	As Template: ⑦	Setup:	[×	Apply
	As Template: ⑦	Setup:			×	Apply Delete Template

- Work through the setup and fill in the fields that will make up the template.
- 2. Scroll back up to the **Template** section.
- 3. Click the "Save as new template" radio button.
- 4. Enter a unique template name.
- 5. Click Save Template.
Apply an Existing Template to an Application

This function allows you to use a previously saved template to populate the application setup fields. Once the template has been applied, any information in any application field (except interest type) can be changed or updated.

Transfer Template

surrendered items		Hide this section
Select Setup Source: Surrendered item 1 - Parcel 100903407	Delete Se	etups for Selected SourceTitles
Source Title(s) for these setups:		
Title No. Owner(s) Parcel No.		
200040578 Tauxalot, Paul 100903407		
Apply Template/Copy From Previous Setup:	•	Apply
Save Setup Data As Template: ③		
O Replace existing Template:	v	Delete Template
O Save as new template:		Save Template

- 1. Select the template name from the "Apply Template" drop down box
- 2. Click **Apply**.
- Update or modify any of the information populated from the template and enter any missing information.

Interest Registration Template

New Interest Setup		Hide all sections 🔽
Apply Template:	×	Apply
Save Interest Registration Data As Template G)	
O Replace Existing Template:	×	Delete Template
O Save as new template:		Save Template

- 1. Select the template name from the "Apply Template" drop down box
- 2. Click **Apply**.
- Update or modify any of the information populated from the template and enter any missing information.

Interest Assignment Template

	Interest Number	Attached To	Share Number	Fractiona Shares	Interest Share Holders	
	200028934	Title: 200043661	200030184	1/1	EyeSpy Developments	
Interests for this setup:	200028945	Title: 200043672	200030195	1/1	EyeSpy Developments	
interests for this setup:	200028956	Title: 200043683	200030207	1/1	EyeSpy Developments	
	200028967	Title: 200043694	200030218	1/1	EyeSpy Developments	
	200028978	Title: 200043706	200030229	1/1	EyeSpy Developments	
Apply Template:				~		Apply
Save Assignment Data As Templa	ate 🕐					
Replace Existing Template:				~		Delete Template

- 1. Select the template name from the "Apply Template" drop down box
- 2. Click **Apply**.
- Update or modify any of the information populated from the template and enter any missing information.

Transform Template

						Hide this section
Select New Parcel:	100900268 Lot 15-Bi	k/Par 31-Plan 3	00000058 Ext 0 F	Parcel (Generic) 💌	Delete Setups for Selected Parcel	
Source Title(s) for	this setup:					
	Parcel: 100900224	Title No.	Owner(s)	Parcel Class Code	Reference Land Description	
		200048251	Blanket, Hank	Parcel (Generic)	Lot 15-Blk/Par 31-Plan 300000047 Ext 0	
	Parcel: 100900257	Title No.	Owner(s)	Parcel Class Code	Reference Land Description	
		200048284	Blanket, Hank	Road Allowance	ORA 124-17 19 2 Ext 0 DESCRIPTION 5	
Apply Template/C	Copy From Previous	Setup:	[×	Apply

- 1. Select the template name from the "Apply Template" drop down box
- 2. Click **Apply**.
- Update or modify any of the information populated from the template and enter any missing information.

Replace an Existing Template

This function allows you to replace information previously saved in a template with updated information.

Transfer Template

Surrenuereu nema				moe diis section
Select Setup Source: Surrendered item 1 - Parcel 10090344 Source Title(s) for these setups:	07 💌	Delete Setups for S	Selected SourceTitles	
Title No. Owner(s) Parcel No. 200040578 Tauxalot. Paul 100903407 Apply Template/Copy From Previous Setup:		×	Apply	
Save Setup Data As Template: ⑦ ○ Replace existing Template: ○ Save as new template:		v	Delete Template Save Template	

- 1. Edit any details that you want changed.
- 2. Scroll back up to the **Template** section.
- 3. Click the "Replace Existing Template" radio button.
- 4. Select the template you wish to replace from the drop down box.
- 5. Click **Save Template**.

Interest Registration Template

New Interest Setup		Hide all sections 🔽
Apply Template:	×	Apply
Save Interest Registration Data As Template 🕐		
O Replace Existing Template:	▼	Delete Template
○ Save as new template:		Save Template

- 1. Edit any details that you want changed.
- 2. Scroll back up to the **Template** section.
- 3. Click the "Replace Existing Template" radio button.
- 4. Select the template you wish to replace from the drop down box.
- 5. Click Save Template.

Interest Assignment Template

	Dek	ete				
	Interest Number	Attached To	Share Number	Fractiona Shares	Interest Share Holders	
	200028934	Title: 200043661	200030184	1/1	EyeSpy Developments	
Interests for this setup:	200028945	Title: 200043672	200030195	1/1	EyeSpy Developments	
interests for this setup.	200028956	Title: 200043683	200030207	1/1	EyeSpy Developments	
	200028967	Title: 200043694	200030218	1/1	EyeSpy Developments	
	200028978	Title: 200043706	200030229	1/1	EyeSpy Developments	
Apply Template:				~		Apply
Save Assignment Data As Templ	ate 🕐					
O Replace Existing Template:				~		Delete Template
O Save as new template:						Save Template

- 1. Edit any details that you want changed.
- 2. Scroll back up to the **Template** section.
- 3. Click the "Replace Existing Template" radio button.
- 4. Select the template you wish to replace from the drop down box.
- 5. Click Save Template.

Transform Template

						Hide dils sec
ect New Parcel:	100900268 Lot 15-BI	k/Par 31-Plan 3	300000058 Ext 0 F	Parcel (Generic) 🔽	Delete Setups for Selected Parcel	
rce Title(s) for t	this setup:					
I	Parcel: 100900224	Title No.	Owner(s)	Parcel Class Code	Reference Land Description	
		200048251	Blanket, Hank	Parcel (Generic)	Lot 15-Blk/Par 31-Plan 300000047 Ext 0	
	Parcel: 100900257	Title No.	Owner(s)	Parcel Class Code	Reference Land Description	
		200048284	Blanket, Hank	Road Allowance	ORA 124-17 19 2 Ext 0 DESCRIPTION 5	
oly Template/C	opy From Previous	Setup:	[×	Apply
	opy From Previous	Setup:	[×	Apply
	As Template: ⑦	Setup:	[M	Apply Delete Template

- 1. Edit any details that you want changed.
- 2. Scroll back up to the **Template** section.
- 3. Click the "Replace Existing Template" radio button.
- 4. Select the template you wish to replace from the drop down box.
- 5. Click Save Template.

Delete an Existing Template

This function allows you to remove a template from the system.

Transfer Template

Select Setup Source: Surrendered item 1 - Parcel 100903407 M Delete Setups for Selected SourceTitles Source Title(s) for these setups: Title No. Owner(s) Parcel No. 200040758 [Tauxalot. Paul 100903402] Apply Template/Copy From Previous Setup: M Apply	
Title No. Owner(s) Parcel No. 200040578 Tauxalot. Paul 100902407	
200040578 Tauxalot. Paul 100903407	
Apply Template/Copy From Previous Setup:	
Save Setup Data As Template: 🔞	
O Replace existing Template: Delete Template	
O Save as new template:	

- 1. Click the "Replace Existing Template" radio button.
- 2. Select the template name from the "Replace Existing Template" drop down box.
- 3. Click **Delete Template**. The system displays a pop-up window to confirm your deletion.

Interest Registration Template

New Interest Setup		Hide all se	ctions 🔽
Apply Template:	×	Apply	
Save Interest Registration Data As Template 🕐			
O Replace Existing Template:	×	Delete Template	
O Save as new template:		Save Template	

- 1. Click the "Replace Existing Template" radio button.
- 2. Select the template name from the "Replace Existing Template" drop down box.
- Click Delete Template. The system displays a pop-up window to confirm your deletion.

Interest Assignment Template

	Interest Number	Attached To	Share Number	Fractiona Shares	Interest Share Holders	
	200028934	Title: 200043661	200030184		EyeSpy Developments	
	200028945	Title: 200043672	200030195	1/1	EyeSpy Developments	
Interests for this setup:	200028956	Title: 200043683	200030207	1/1	EyeSpy Developments	
	200028967	Title: 200043694	200030218	1/1	EyeSpy Developments	
	200028978	Title: 200043706	200030229	1/1	EyeSpy Developments	
Apply Template:				*		Apply
Save Assignment Data As Temp	Ø					
bave Assignment Data As Temp						

- 1. Click the "Replace Existing Template" radio button.
- 2. Select the template name from the "Replace Existing Template" drop down box.
- 3. Click **Delete Template**. The system displays a pop-up window to confirm your deletion.

Transform Template

						Hide this section
Select New Parcel	: 100900268 Lot 15-BI	k/Par 31-Plan 3	300000058 Ext 0 F	Parcel (Generic) 🔽	Delete Setups for Selected Parcel	
ource Title(s) for	this setup:					
	Parcel: 100900224	Title No.	Owner(s)	Parcel Class Code	Reference Land Description	
		200048251	Blanket, Hank	Parcel (Generic)	Lot 15-Blk/Par 31-Plan 300000047 Ext 0	
	Parcel: 100900257	Title No.	Owner(s)	Parcel Class Code	Reference Land Description	
		200048284	Blanket, Hank	Road Allowance	ORA 124-17 19 2 Ext 0 DESCRIPTION 5	
opply Template/	Copy From Previous	Setup:	[M	Apply

- 1. Click the "Replace Existing Template" radio button.
- 2. Select the template name from the "Replace Existing Template" drop down box.
- 3. Click **Delete Template**. The system displays a pop-up window to confirm your deletion.

Client Entities

Throughout the OLS tool you will need to specify new title owners, interest holders, or title print recipients. These are known as client entities in ISC's systems.

The OLS tool provides a number of options to specify these entities:

- Submitting Party is the client number used when you logged in to the system or entered as the submitting party when you created the packet. In most cases, this selection is only used for Title Print Requests.
- Create New Client Entity allows you to create a new Client Entity in the LAND System. For Title Transfers and Transforms, the entity <u>MUST</u> be a person rather than a corporation. For Interest Registrations or Title Print Requests, the entity can be either.
- Select from Packet allows you to select Clients previously used in this packet.
- Search for Client allows you to search for a corporation with a COBRA-related client number by either the Corporation Name or the Corporation Number.

Note: You may also search for individual entities.

• Quick Add allows you to enter the client number of an existing client entity.

Note: Not all options are available for all transactions types. For example, you cannot create a new corporate entity as the owner of a title. The corporation must already exist and have an active Corporations Branch (COBRA) number and an ISC COBRA-related client number.

Submitting Party Request Title Prints Hide this section 💌 Select application for Title Print Request: Application #2 - Transfer Title Setup Recipient(s): Send 1 copy(ies) of the Title Print to: Client #: 400031930 Selection Change Options Train50 10 Research Dr egina, Saskatchewan Canada Submitting Party ? Create New 0 Select from Packet 0 Search for Client ? Quick Selection by Client Numbe Client Number: ______ Quick Add Select All Preferred Delivery Method(s): Delivery Method Details Grouping Email train.train@isc.ca Preferred

 Click Submitting Party. The system populates the Recipient(s) field with the necessary information.

NOTE: The **Submitting Party** button <u>only</u> appears when you are requesting title prints. See the Title Prints section of this module for details on completing this step.

Information Services Corporation

Create New Client Entity

Selection Change Options	
Create New	?
Select from Packet	0
Search for Client	0
Quick Selection by Client Client Number:	
Quick	Add

1. Click Create New. The system displays the Create Client entry screen.

Create Client	
Client Type	
• Person ?	
Last Name*:	
First Name*: Second Name: Third Name:	
Generation:	
Non-Person 2	
* indicates a Required field	
Mailing Address	
Attention:	
Address 1*:	
Address 2:	
City*: Province/State: SK	
Postal Code:	
Zip Code / Other:	
Country: Canada 💌	
* indicates a Required field	
Other Contact Information	
Email Address:	
Fax Number: (
Phone Number: ()	
Preferred Method of Delivery $? $	
Email 🛛 Fax 🗹 Mail (Paper) 🔲 Mail (CD-ROM)	
Save Done Cancel	

- 2. Select the Client Type by clicking the "Person" or "Non-Person" radio button.
 - If Person is selected, enter the Last Name and Given Name. You may also enter the Second Name, Third Name, and Generation, although these fields are not required.

• If "Non-Person" is selected, enter the **Corporation Name**.

- 3. Enter the **Mailing Address** information. The system indicates the required fields.
- Optionally enter the Other Contact Information.
 Certain fields are required based on your selection of Preferred Delivery Method.
- 5. Select the Preferred Method of Delivery for notifications.
- Click Save. The system returns to the Recipient(s) section which is now populated with the necessary information.

Select From Packet



1. Click Select from Packet. The system displays the Select from Packet entry screen.

Search	Search Results 1 Record(s) Found				
	Client Number	Name	Address		
۲	400031930	Train50	10 Research Dr, egina, Saskatchewan, Canada		
	•				
				ОК	Cancel

- 2. Click the radio button beside the Client you wish to select.
- Click **OK**. The system returns to the Recipient(s) section which is now populated with the necessary information.

Search for Client

Selection Change Options	
Create New	?
Select from Packet	?
Search for Client	?
Quick Selection by Client Client Number:	Number
Quick	Add

1. Click Search for Client. The system displays the Search for Client entry screen.

Search for Client	
Search By: Corporation Name	
Corporation Name:	
	Find
	OK Cancel

- 2. Select an option from the "Search By:" drop down box.
- Enter the name or number. If you select name you may also click the check box to "Include names that are similar in spelling."
- 4. Click **Find**. The system returns a list of entities that match the search criteria.
- 5. Click the radio button beside the correct entity.
- Click **OK**. The system returns to the Recipient(s) section which is now populated with the necessary information.

Existing Client

Selection Change Op	tions
Create Nev	v 🕐 🕐
Select from Pa	cket
Search for Cli	ient 🕐
Quick Selection b Client Number:	y Client Number
	Quick Add

 Enter the Client Number and click Quick Add. The system returns to the Recipient(s) section which is now populated with the necessary information.

Entering Packets Into the System

In order for ISC to process your work in OLS, you must enter a packet into the system. You have two options to do this:

- Create a new packet.
- Select an existing packet.

Create A New Packet

To create a new packet in the OLS system:

Select or Create Packet Hide this section
Create in a New Packet
Add to Existing Packet

 To create a new packet, select the "Create in a New Packet" radio button. The system will open the Select or Create Packet screen.

Select or Create Packet		Hide this section 🖬
Create in a New Packet Packet Header Info		
Packet Header Info		
Packet Informatio	n	Account Information
Submitting Party:	Train50 10 Research Dr, egina, Saskatchewan, Canada	Account Number: 300001082
Client No:	400031930 Find Packet Type: Title Processing	New Account Password:
Client Ref. No:	Packet No:	
	6	
Packet Description:		
]
		Save Continue Clear
○ Add to Existing Packet		

- If the packet is to be submitted under a different client number, enter the new Client No: and click the Find link. The system will display the name and address of the new submitting party.
- The account information can be changed if this packet is to be charged to a different account.
 Enter the Account Number and Account
 Password for that account.
- Enter an optional Packet Description to help you identify the packet in the Packets List.

 Click Save or Continue. The system will generate a packet number and refresh the screen allowing you to carry on with the transaction.

NOTE: If you entered a Client Reference during login, it is carried forward to this field. You can change or remove it if required. This number is for your information and is another way to distinguish this packet from others. The Client Ref. No. will appear on your ISC invoice for this packet.

Select an Existing Packet

To add to a packet that you have already entered into the OLS system:

Select or Create Packet	Hide this section 💌
○ Create in a New Packet	
○ Add to Existing Packet	

 Click the "Add to Existing Packet" radio button. The screen expands.

Select or Create Packet		Hide this section 🔽
🔿 Create in a New Packet		
Add to Existing Packet		
Select Existing Packet: Packet No: Description:		Select
Search for Packets by: Packet No	Client Ref. No.	Search Advanced Search

There are several options to retrieve an existing packet in order to add additional applications.

Select Existing Packet

Select or Create Packet		Hide this section 🔽
🔿 Create in a New Packet		
Add to Existing Packet		
Select Existing Packet: Packet No: Description:		Select
Search for Packets by: Packet No	Client Ref. No.	Search Advanced Search

- 1. Enter the **Packet Number** or select a **Packet Description** from the drop down.
- Click Select. The system will open the packet and allow you to add additional applications.

Search for Packet

Select or Create Packet	Hide this section 🔽
🔿 Create in a New Packet	
Add to Existing Packet	
Select Existing Packet: Packet No: Description:	Select
Search for Packets by: Packet No Clie	nt Ref. No Search Advanced Search

- 1. Enter the **Packet Number** or **Client Ref. No.** into the corresponding field.
- 2. Click **Search**. The system will display a list of packets that match the search criteria.

elect or Create Packet						Hide this section 💌
🔿 Create in a New Packet						
Add to Existing Packet						
Select Existing Packet: Pa	acket No: escription:		•	Select		
Search for Packets by: P	acket No 200080	0549 Client Ref. No.			Search	Advanced Search
Search Results 1	1 Packet(s) Foun	đ				Ø
Packet No. Re	eference No.	Description	Packet Type	Submitted	Status	Reason for Rejection
200080549			Title Processing		Draft	
Select						

- 3. Select the check box for the appropriate Packet.
- 4. Click **Select**. The system will open the packet and allow you to add additional applications.

Advanced Search for Packet

Select or Create Packet	Hide this section 🔽
○ Create in a New Packet	
Add to Existing Packet	
Select Existing Packet: Packet No: Description:	Select
Search for Packets by: Packet No Client Ref. No.	Search Advanced Search

 Click the Advanced Search link. This will then give you the ability to search for an existing packet by packet description and/or the date range the packet was created or last modified.

Se	lect or Create Pac	ket		Hide this section	
(🔵 Create in a N	ew Packet			
(Add to Existing	1g Packet			
	Select Existing	J Packet: Packet No: Description:		Select	
	Search for Pa	ckets by: Packet No	Client Ref. No.	Search Basic Search	
	Description				
	Date Range	Packet Create Date	From Date	To Date	

- Enter any or all of the Packet Description <u>and/or</u> select the date range criteria from the drop down and enter or select the From Date and To Date.
- 3. Click **Search**. The system will open the packet and allow you to add additional applications.

Request Title Print

Note: Requesting a title print is optional.

The title print request list is displayed by clicking the **Twisty** or the **Show this section** link. Title print requests must be added to the list before they will appear in the list.

Request Title Prints						Hidet	his section 💌
Select application for Title Print Requ	uest: Application #2 - Transfer	Title Setu					
Summary of Title Requests 🔞				Add	Edit	Remove	
Application for Title Requested	Recipient	# Of Copies	Email	Fax		Delivery Method	

1. Click Add. The Request Title Prints section opens with the submitting party receiving one copy by default.

Request Title	Prints			Hide this section 💌
Select applic Recipient(s): Send 1	ation for Title Print Request: Application #2 - Transfer	nie Setup 💌		
Train5 10 Res	earch Dr Saskatchewan		Sel Sel Se	Change Options Jomitting Party ⑦ Create New ⑦ ect from Packet ⑦ arch for Client ⑦ election by Client Number umber: Quick Add
Delivery Met				Select All Preferred
	Delivery Method	Details		Grouping
	Email	train.train@isc.ca		Preferred
				End Edit

- 2. If more than 1 copy is required, enter the number of copies in the **Send** field.
- You may change the Title Print recipient in the Selection Change Options area on the right hand side. The options are:
 - Submitting Party The Client Number used to sign in to the OLS application or entered as the submitting party in the Packet Header.

Create New - Allows you to 0 create a new Client entity in the Land System. Select from Packet – Allows 0 you to select a Client referenced in this packet. Search for Client – Allows Ο you to search for a corporate client number (Cobra related client number) or an individual client number. Quick Add with Client 0 Number – Allows you to enter an existing Client number.

- 4. Select the preferred delivery method(s) for the displayed client.
- Click End Edit to save your selection. The system displays an updated list of the requested title prints that includes:

0	The application to which the
	title print request applies.
0	The name of the recipient
	with delivery information.
0	The number of copies.
0	The method of delivery.

NOTE: To request additional title prints, click **Add** and repeat the above steps.

F	leques	t Title Prints						Hide t	this section 🗖
Select application for Title Print Request: Application #2 - Transfer Title Setup 💌									
	Summa	ary of Title Requests 🕐				Add	Edit	Remove	
		Application for Title Requested		# Of Copies	Email	Fax	Address	Delivery Method	
		Transfer Title Setup	Train50	1	train.train@isc.ca		10 Research Dr, egina, Saskatchewan, Canada		

- To edit or remove a title print request, click the check box in front of the request and click Edit or Remove.
- If the list of title print request(s) is correct, click
 Save at the bottom of the screen.

Managing Authorizations and Attachments

Authorizations and attachments are documents that form part of the packet and are added to the packet prior to submission. The OLS Tool has the ability to upload documents as well as store and retrieve documents for future use.

Many applications require authorization and/or attachment documents to confirm the signatory has authority to approve the transaction or to provide additional information about the transaction. These documents are kept on file at ISC. The same business rules and requirements for authorization and attachments continue to apply as in the past.

Authorizations vs. Attachments

Authorization(s) must accompany every application except an interest registration. Authorizations allow ISC examiners to confirm the signatory has the authority to approve the transaction. *The Land Titles Act, 2000* prescribes the proper execution of certain Authorizations. Also, various other Acts have specific prescribed forms of Authorization or additional requirements that relate to the particular Act. In these cases, the specific Act should be consulted.

Attachments are documents that provide additional disclosure to the application. ISC does not examine attachments for validity. In the context of an interest registration, an attachment constitutes notice to third parties. Customers should be aware that they are only protected against third parties for what they disclose.

Within the Online Submission tool, documents must be in electronic format. The OLS system provides the ability to fax and mail paper based documents to ISC for users without a scanner to create an electronic copy of the file for use.

Once the document is in the OLS system, its use must be indicated as either an authorization or attachment for the relevant application.

A number of functions are available to manage documents. These include the ability to upload, rename, view, or remove documents.

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Copies of documents can also be stored in the *My OLS Documents* area where they are accessible for use in other packets.

Managing Authorizations and Attachments – The Basics

To manage authorizations and attachments:

- 1. Add Authorizations or Attachments to Applications in the Packet
 - Upload, fax, or mail documents, or move documents from the *My OLS Documents* storage area to the packet within the OLS system.
 Use DSL.
- 2. Identify Documents as Authorizations or Attachments
 - 0
- Add the document(s) to the appropriate transaction(s) within the packet and identify as an Authorization or Attachment.

Step-By-Step Reference

The following provides detailed instructions that will guide you through successfully managing your authorizations and attachments.

Step 1: Add Authorizations or Attachments to Applications in the Packet

These steps may be performed from within a transaction or from the *Packet Content List* screen. The *Manage Authorizations & Attachments* screen in the *Packet Content List* is similar to the screen in the transaction tabs except it also includes a **drop down** box to indicate the appropriate application in the packet. Locate the *Manage Authorizations & Attachments* header on the *Packet Content List* screen and expand the section by clicking the **Twisty** or **Show this section** link. The header is found near the bottom of the screen. You may need to scroll down to find it.

Upload Documents to Packet

lanage Authorizations & A	ttachments			Hide this section 🔽
acket List (Uploaded do	cuments associated with thi	s packet)		
Select All 📀	Show Packet Docs 🔾 Show	Application Docs View Doc	Rename Remove	Add to My OLS Docs
Uploaded Document	DSL Number	Attached to Application As	Virus Detected?	File Type File Size
			New Upload	Add From OLS Docs
Add DSL Item To Pack	et			
DSL#	Add To Packet	Search DSL		
ownload Cover Page				
Submission Method	• Fax (Fax-In Cover	Page)		
	O Mail (Mail-In Cover	Page)		Download Cover

1. Click **New Upload**. The upload screen will appear.

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Select Files to Upload	
	Browse Upload
Select All	Delete
Uploaded Document List	

Upload Progress:

I 0.00%

ĺ	Done	Cancel	
	nts uploaded and ur packet if you	l listed above will click Cancel.	not be

2. Click **Browse** to display the **Choose File** screen to access files saved on your PC or network.



Browse to locate the file. Double click on the file name or Single click on the file name and click
 Open. The system places the location and name of the file in the "Select Files to Upload" field.

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Select Files to Upload		
\\ltfsprd02\CGbekorb\$\Authorization.doc	Browse	Upload
Select All		Delete
Uploaded Document List		

Upload Progress:

25.90%

Done	Cancel	
nts uploaded and our packet if you c	listed above will not lick Cancel.	be

4. Click **Upload**. The system displays a progress metre with the estimated time remaining and uploads the file. Once the file has finished uploading it will appear in the list of uploaded documents. Continue to browse and upload files until all documents are uploaded.

Sele	lect Files to Upload		
		Browse	Upload
	Select All		Delete
	Uploaded Document List		
	Authorization.doc		

Upload Progress:

	Done	Cancel	
	nts uploaded and ur packet if you c		will not be

5. When all documents have been uploaded, click
 Done. The system returns to the Manage
 Authorization and Attachment screen.

Select All Oploaded docume	ents associated with this r Packet Docs 🔿 Show A		/iew Doc Re	ename Remove	Add to	My OLS Docs
Uploaded Document	DSL Number	Attached to Appli	cation As	Virus Detected?	File Type	File Size
Interest Authorization.pdf	n/a	Authorization	Attachment	No	PDF	70000 Bytes
dd DSL Item To Packet SL# ownload Cover Page	Add To Packet	Search DSL		New Upload	Add Fro	m OLS Docs
SL#	Add To Packet))		New Upload	Add Fro	m OLS Docs

6. The uploaded documents will appear in the list.

Fax or Mail Documents to Packet

If you do not have electronic copies of your documents or you prefer to submit paper copies, you will need to print a cover page for each set of documents. Do <u>NOT</u> photocopy the cover page since the bar codes may not be readable.

acket List (Uploaded do	cuments associated with this	s packet)		
Select All 📀	Show Packet Docs 🔿 Show .	Application Docs View Doc	Rename Remove	Add to My OLS Docs
Uploaded Document	DSL Number	Attached to Application As	Virus Detected?	File Type File Size
			New Upload	Add From OLS Docs
			New Upload	Add From OLS Docs
dd DSL Item To Pack			New Upload	Add From OLS Docs
	et Add To Packet	Search DSL	New Upload	Add From OLS Docs
SL#		Search DSL	New Upload	Add From OLS Docs
dd DSL Item To Pack SL# ownload Cover Page ubmission Method			New Upload	Add From OLS Docs

- 1. Click the radio button for Fax or Mail cover page.
- 2. Click **Download Cover**.



3. A **File Download** dialog box opens and provides options to **Open** or **Save** the file.

NOTE: If you select **Open**, the cover page opens in a new window. If you select **Save**, the file can be saved on your PC and opened later. Click **Open** unless you want to save a copy to your PC.



200080561



Online

Submission Authorization & Attachment Fax Cover Page

> Fax your package to: 306-798-1525

- If submitting multiple applications in one Packet and you want the authorizations and/or attachments separated by applications, print a copy of the fax cover page (FCP) to place before each application.
- If you want all documentation in an application attached as a single upload and linked to the same application, place one FCP before all of the documentation.
- If you want all authorizations and/or attachments in an application to remain as separate attachments, print a copy of the FCP to place between each authorization and/or attachment.

This fax cover page can only be used for this packet. Please print copies as needed.

Additional questions? Call us at 1-866-275-4721 or e-mail ask@isc.ca

- 4. The Fax Cover Page you download will look as illustrated above. Print a copy of the cover page for <u>each</u> document to be submitted. Do <u>not</u> photocopy the cover page as the bar code may not be readable. It is also important to set the "Printer Properties" on your PC to "Best Quality" or "High Quality." This will help to ensure that the bar codes are readable.
 - The first bar code identifies this as a document that will be attached to an OLS packet. The second bar code is the unique packet number.

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Note: You may receive two dialog boxes when you click **Download Cover**. If you receive the second dialog box, it is caused by a security setting in your browser and is normal.

- 5. Assemble the documents with a cover page in front of each set of documents.
 - If you are submitting by fax, the entire package of documents is faxed together. Fax the package to 306-798-1525. Do <u>NOT</u> fax this package to any other ISC fax number. It is very important your fax is set to the highest resolution available. The setting may be "Very Fine" or "Extra Fine." If you do not use this setting, the bar codes may not be readable.

Note: If the documents are submitted by fax, they should be ready for use in 10 to 15 minutes. This time frame may be longer if there is a backlog on the fax server. If the documents are submitted by mail, it could take a couple of days before they are ready for use.

Note: If the bar codes on the cover page are not readable, the documents will not be added for use in the packet. If this happens, you will receive a notification letter by fax indicating that the bar codes were unreadable. The letter will also provide details on the steps you should take to help ensure that the bar codes are readable. You will need to re-fax the documents.

 If you are submitting by mail, only send <u>copies</u> of your original documents with each mail cover page, as ISC does not return these documents. Send the entire package to:

Information Services Corporation 1301 – 1st Avenue Regina, Saskatchewan S4P 3V7

Manage Authorizations & Att	achments					Hide this secti	on 📼
Select application to view up	loaded documents: Applic	ation #1 - Title Surrender [~				
Packet List (Uploaded doc	uments associated with this	packet)					
Select All O S	how Packet Docs 🔿 Show A	pplication Docs	riew Doc CR	ename Remove	Add to	My OLS Docs	0
Uploaded Document	DSL Number	Attached to Appli	cation As	Virus Detected?	File Type	File Size	
Interest Authorization.p	df n/a	Authorization	Attachment	No	PDF	70000 Bytes	5
Add DSI Item To Packet				New Upload	Add Fro	om OLS Docs	
DSL#	Add To Packet	Search DSL					
Download Cover Page							
Submission Method	💿 Fax (Fax-In Cover P	age)					
	O Mail (Mail-In Cover F	Page)			0	ownload Cover	?
						Save	

6. When the document is ready for use, it will appear in the list of uploaded documents for the packet and you will receive a notification for each document on the OLS Home page in the OLS Notification area.

NOTE: It is recommended that you view each document submitted by fax or mail to ensure that it is complete and that all pages included are submitted. To view the notification details, click the check box in the left column and then click **Details**. The notification details appear in a pop up window.

Note: The system generates a unique name for each document submitted by fax or mail. You may want to rename each document to something that is easy to identify.

Add Documents to Packet from My OLS Documents

The **My OLS Documents** storage area is used to store documents that can be accessed from any of your packets. Documents can be uploaded to this area, added from this area to a packet, and added from a packet to this area.



 From the Manage Authorizations and Attachments screen, click Add From OLS Docs. The system opens the My OLS Documents screen.

My	OLS Do	II New Upload View Doc F	Rename Remove	Add to Packet List
		Uploaded Document List	File Type	File Size
E		Interest Authorization.pdf	PDF	70000 Bytes

Done	

2. Click the check box to the left of the document(s) you want to move.

Note: More than one document may be selected at once.

- 3. Click Add to Packet List.
- 4. Click **Done**.



5. The system closes the **My OLS Documents** screen and the document(s) is added to the uploaded document list.

Add Standard Mortgage Documents from Document Submission Library

Select All 💽	Show Packet Docs 🔿 Show	Application Docs View Doc	Rename Remove	Add to My OLS Docs
Uploaded Document	DSL Number	Attached to Application As	Virus Detected?	File Type File Size
			New Upload	Add From OLS Docs
dd DSL Item To Packe	t			
dd DSL Item To Packe	Add To Packet	Search DSL		
SL#	Add To Packet			
	Add to Packet			
SL#	• Fax (Fax-In Cover	Page)		

- If you know the DSL#, you may enter it. If you do not know the DSL#, you may search for it by clicking Search DSL. This will launch the DSL application and allow you to identify the number.
- Click Add to Packet. The standard document will be added.

Step 2: Identify Documents as Authorizations or Attachments

Once documents have been uploaded to the OLS system, they must be identified as an Authorization or Attachment for the respective transaction. This step can be accomplished in the *Manage Authorizations & Attachments* screen in either the transaction tab or the *Packet Content List*.

Note: There are also radio buttons to indicate if you want to view all documents in the packet or only those associated with the selected transaction. Click on the "Show Packet Docs" radio button to see a list of documents uploaded to the packet. Click on the "Show Application Docs" radio button to see documents that are <u>only</u> associated with the current application.



- 1. Click the check box for the Uploaded Document.
- 2. Click either the "Authorization" or "Attachment" check box as appropriate.
 - Repeat steps 1 and 2 for each uploaded document.
- 3. Click **Save**.

NOTE: The packet list displays all of the documents uploaded to the packet. The "Select Application to view uploaded documents:" drop down allows you to view the specific documents "Attached to Application As" associated with the selected application. If you have two applications listed under the drop down, for example, one application may only have an authorization while the second may have both an authorization and an attachment (see below for details).

Packet List (Uploaded d	ocumenta associa	ted with this packet)				
Select All	Show Packet Do	cs O Shew Application	Docs Vev Dec	Rename	Remove:] [A	ad to My OLS Doce
Uploaded	d Document A	ttached to Applicatio	on As	Virus Detected?	File Type	File Stre
Authorizat		Authorization	Attachment	Pet	POP	70000 Bytes
				These success	- ANTON	OLB Dece
Add DSL Item To Pecket				Ten: Sylved	(and Free	OLB Dese

Details for Application #1

Information Services Corporation

		ciated with this packet	1				_
Select All		Docs O Show Applicat		Rename	Ranove)(dd lo Ny OLS Doce	
	Uploaded Document	Attached to Applica	tion As	Virus Detected?	File Type	File Size	
	Attachment.pdf	Authorization	Attachment	No	POP	70000 Bytes	
D	Authorization.pdf	Authorization	Attachment	No	POF	70000 Bytes	
dd DSL Item				New Upped) (n OLS Dece	

Details for Application #2

Manage Authorization and Attachment Documents

The OLS system provides a number of functions to assist in managing authorization and attachment documents. Uploaded documents can be viewed, renamed, removed, and moved to the **My OLS Documents** storage area. These actions are performed from the **Manage Authorizations and Attachments** screen in either the transaction tab or the **Packet Content List**.

These functions are also available for documents stored in the **My OLS Documents** area from the **My OLS Documents** screen.

View Uploaded Documents

The OLS system provides the ability to view documents uploaded to the packet. It is recommended that you view each document you upload to ensure the upload succeeded and the document is complete.

Select All 💿 SI	elect All OShow Packet Docs OShow Application Docs View Doc				nove Ad	e Add to My OLS Docs	
Uploaded Document	DSL Number	Attached to Applie	ation As	Virus Detected?	File Type	File Size	
Authorization.doc	n/a	Authorization	Attachment	No	DOC	6903808 Bytes	
				New Upload	Ad	d From OLS Docs	
dd DSL Item To Packet				New Upload	Ad	d From OLS Docs	
	Add To Packet	Search DSL		New Upload	Ad	d From OLS Docs	
)SL#	Add To Packet	Search DSL		New Upload	Ad	d From OLS Docs	
Add DSL Item To Packet DSL# Iownload Cover Page	Add To Packet			New Upload	Ad	d From OLS Docs	

- 1. Click the check box to the left of the document you wish to view.
- 2. Click **View Doc**. A **File Download** dialog box opens and provides options to open or save the file. Select an option.

Note: If you select **Open,** the document opens in the appropriate application. For example, if the document is a .DOC file, it opens in Microsoft Word. If you select **Save**, the file can be saved on your PC and opened later. Click **Open** unless you want to save a copy to your computer or network.
Rename Uploaded Documents

The OLS system provides the ability to rename documents uploaded to the packet. This function is especially useful for documents sent in by fax or mail, as they are stored with unique system generated file names.

Manage Authorizations and	d Attachments					Hide this section
Packet List (Uploaded d	ocuments associated with thi					
Select All	O Show Packet Docs ○ Show	w Application Docs	View Doc	Rename	Remove A	dd to My OLS Docs 🛛 🤇
Uploaded Docume	nt DSL Number	Attached to Appli	cation As	Virus Detected	? File Type	File Size
Authorization.doc	n/a	Authorization	Attachment	No	DOC	6903808 Bytes
				New Up		dd From OLS Docs
				New up		dd From OLS Docs
Add DSL Item To Pac	ket Add To Packet	Search DSL				
DSL#	Add To Packet					
Download Cover Page						
Submission Method	Fax (Fax-In Cover	r Page)				
	🔿 Mail (Mail-In Cove	er Page)				Download Cover

1. Click the check box to the left of the document you wish to rename.

2. Click **Rename**.

Current Document Name:	Authorization		
New Document Name:			

- 3. A **Rename** dialog box opens and provides a field to enter the **New Document Name**.
- 4. Enter the new name.
- 5. Click **OK**.

Remove Uploaded Documents

The OLS system provides the ability to remove documents uploaded to the packet. Once documents are removed, they are no longer available for use.

anage Authorizations and A	ttachments						Hide this sec	ion
acket List (Uploaded doo								
	Show Packet Docs 🔿 Sh		View Doc	Rename	Remove		d to My OLS Docs	
Uploaded Document	DSL Number	Attached to Applie	ation As	Virus Detecter	d? File	Туре	File Size	
Authorization.doc	n/a	Authorization	Attachment	No	DOC	2	6903808 Bytes	
Add DSL Item To Packe		Count DS		New U	lpload	Ad	d From OLS Docs	
DSL#	t Add To Packet	Search DSL		New U	lpload	Ad	d From OLS Docs	
Add DSL Item To Packe DSL# Download Cover Page Submission Method				New U	ipload	Adi	d From OLS Docs	

 Click the check box to the left of the document(s) you want to remove.

NOTE: More than one document may be selected at once.

 Click **Remove**. The document(s) is removed from the system and the list of uploaded documents is updated.

Note: The system does <u>not</u> provide a dialog box to confirm the files are to be removed. The documents are removed as soon as **Remove** is clicked.

Validation, Errors, Create Summary Report and Submit Packet

The OLS tool provides a function to validate the information entered into a transaction. Three levels of validation take place in the system. The levels are:

- Field level
- Transaction level
- Packet level

Field Level Validations

Field level validations are performed on certain fields as information is entered into the system. For example, title numbers, interest numbers, client numbers, and transform approval certificate (TAC) numbers are validated as they are entered. If the number is invalid or does not exist, the system provides the appropriate error message.

Transaction Level Validations

Transaction level validations are performed when **Validate** is clicked on one of the Transaction tabs. The system goes through a series of checks to ensure that all the information entered in the transaction is correct. When the validation is completed the system displays a message box indicating whether or not any errors or warnings were encountered during validation.

All transaction screens have the following buttons at the bottom of the screen:



- The **Save** button saves the data, as entered, to the database without business rule validations.
- The **Validate** button saves the data to the database, as entered, and runs through a series of validations for the transaction.
- The **Cancel Transaction** button cancels changes made on the screen and reverts the data back to its last saved state. If the transaction is new and has not been saved, the transaction portion of the screen disappears.
- The **Delete** button deletes the current transaction. A message box displays to confirm you want to delete the transaction. If the transaction is new, the button behaves the same as the **Cancel Transaction** button.

It is a good idea to save your work frequently throughout the packet building process.

You should **Validate** your application when you are satisfied that all required elements are correct. If errors are encountered during the validation, a pop-up message box will be displayed and the screen will be repositioned to the **Validation Errors** section.

NOTE: If you have multiple applications in your packet, validate each application prior to submitting the packet.

If the transaction validates successfully, the following message is displayed.



If an error or warning is encountered during validation, the following message is displayed.

Message	e from webpage 🛛 🛛 🔀
⚠	Errors or warnings encountered during validation.
	ОК

If errors or warnings are encountered the system repositions the screen to the Error section when **OK** is clicked. The Error section provides a list of the errors or warnings. Errors appear in <u>red</u> and warnings appear in <u>vellow</u>. Informational messages appear in <u>blue</u>. The message also provides information on the action you need to take to resolve the error. An example of an error message is provided below.



Correct the error(s) and click **Validate** again. Repeat this process until all errors are resolved.

Warning messages are for informational purposes. An example of a warning message may pertain to Locks on Titles. You may need to take action before submitting the packet.

Packet Level Validations

Packet level validations are performed when you **Submit** the packet. The system goes through a series of checks to ensure that the information entered in each transaction is correct and that transactions within the packet do not conflict with one another. For example, a packet cannot contain transactions for both a Transform and a Transfer.

Results of the packet level validation are returned to the OLS Notification area. If the packet is successfully validated, the system provides a message indicating this and then places the packet into the queue for examination by a title processor.

If errors are encountered, the OLS Notification indicates this and provides a hyperlink to view the packet in the Packet Content List. The Packet Content List includes an Error section that lists all the errors. The Error section also provides hyperlinks to open the appropriate transactions to fix the errors. An example of the Error section is included below.

Validation Errors	Hide this section 💌
Application #1 - Title Surrender Errors:	
Authorization missing and required	
Application #2 - Transfer Title Setup	

Validation

All transaction screens have the following buttons at the bottom of the screen:



- The **Save** button saves the data (as entered) to the database without business rule validations.
- The Validate button saves the data (as entered) to the database and runs a series of validations for the transactions.
- The Cancel Transaction button cancels changes made on the screen and reverts the data back to its last saved state. If the transaction is new and has not been saved, the transaction portion of the screen disappears.

• The **Delete** button deletes the current transaction. A message box displays to confirm if you want to delete the transaction. If the transaction is new, the button behaves the same as the **Cancel Transaction** button.

Note: It is a good idea to save your work frequently throughout the packet building process.

You should **Validate** your application when you are satisfied that all required elements are correct. If errors are encountered during the validation, a pop-up message box will be displayed and the screen will be repositioned to the Validation Errors section.

Note: If you have multiple applications in your packet, validate each application prior to submitting the packet.

The **Validate** button is used to validate each application. The process only validates the application that you are in or that is being worked on at the moment.

The following buttons are found at the bottom of the screen:



- The **Submit Packet** button allows you to submit the packet.
- The Cancel Packet button cancels changes made on the screen and reverts the data back to its last saved state. If the transaction is new and has not been saved, the transaction portion of the screen disappears.

View Packet Content	Create Summary Report	Add Transfer	Submit Packet	Cancel Packet

Clicking the **View Packet Content** button allows you to see the contents of your "draft" packet.

View Packet		
Search for Packets by: Packet No	Client Ref. No.	Search Advanced Search
Packet Error List		Show this section D
Print		Hide this section 🖬
Header Print ②		
Header & Application List Print		
Packet Report		
Select all Applications V Include Authorization() Attachment(s) Add	e) Remove	
Application Type	Description	Print Print Authorization Attachment
Packet Content Packet Header Info		Create Summary Report ⑦
Packet Information Submitting Party: Train50 Client No: 400031930 Client Ref. No: Packet Description: Status: Draft	10 Research Dr., egina, Saskatchewan, Canada Packet Type: Title Processing Packet No: 200088446 Expiry Date: 10-Apr-2013	Account Information Account Number: 500001082
	Add: O Transform O Intere	
Request Title Prints		Show this section 🚺
Manage Authorizations & Attachments		Show this section D
		Validate Packet Submit Packet

1. Click Validate Packet. The system will display the following dialogue box:



Note: The **Validate Packet** button will move your packet offline where the OLS system performs an automated check of the assembly of each application within your packet to ensure that all requirements of ISC's business rules are met. Once the offline validation has been completed, notification of success or failure will be sent to your OLS Notifications section on the OLS Homepage and the packet will return to "Draft" status. The notification will indicate if any validation errors were found and include a link to open the packet (which is in the Packet Content List page). Errors will be listed in the Validation Errors section of the packet.

2. Click **OK** to validate the packet or **Cancel** if you do not want to validate the packet at this time.

Note: You will not be able to open or work on the packet until the validation has completed.

Note: If you exceed the maximum number of applications within your packet or if your transaction contains more than the system allotted attached items, validation will take place off-line. The maximum number of items in an OLS application group before validation is done offline is:

Application Type	Maximum	Item Type
Title Transfer	15	Applications
Transform	100	Applications
Interest Registration	100	Interests
Interest Discharge	15	Interests
Transmission	15	Titles
Surviving Joint Tenant	15	Titles
Alternate Authority	15	Titles/Interests
Commodity Split	100	Applications
Interest Assignment	100	New Shares
Interest Amendment	100	New Interests
Judgment Registration	101	Interests

3. When the off-line validation is complete, the packet status will return to "Draft" and you will receive a notification in the **OLS Notification** area on the Home page. The notification will indicate if validation errors were encountered and include a link to open the packet in the **Packet Content List** page. Validation errors will be listed in the **Validation Errors** section of the page.

Create Summary Report

Once you have saved and validated your application within your packet, you should create a summary report.

Note: The summary report generated will be for the current application only.



Click the check the box in front of the Packet
 Print Request that you need and click **Details.**



 The View Notification – Webpage Dialog window will open. The OLS Notification will include a link to the report. View the Notification Details and click the report link.

File Dow	rnload 🛛 🔀
Do you	want to open or save this file?
	Name: 375fee75-2033-4aa7-82c4-da3a51329686.PDF Type: Adobe Acrobat Document From: training.isc.ca
0	While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. <u>What's the risk?</u>

5. The system will open a dialog box with options to Save or Open the report. Select an option. If you select Open, the report will open in a new window. From this point you may Save or Print the report.

If you have more than one (1) application within your packet and you wish to create a summary report for each application, you will need to create the report from the packet content list. This option allows you to select the Applications in the packet that should be included in the report. You may also specify if the Authorization and/or Attachments documents should be included on an Application by Application basis.

nt		Hide this section
ader Print ②		
ader & Application List Print		
icket Report 🕐		
elect all Applications	Include Authorization(s)	
	Attachment(s)	
	Add Remove	
Application Type	Description	Print Print
		Authorization Attachment

1. Select the applications from the drop down box.

Note: If you choose "Select all Applications," the list will include all applications in the packet.

- 2. Click the check boxes to include the attachments and authorizations if required.
- 3. Click **Add**. The system adds the selected items to the list.

NOTE: As items appear in the list, the **Remove** button is enabled. If you wish to remove items from the list, click the check box to the left of the item and then click **Remove**.

Print			t.	Hide this section 💌
<u>Header</u>	Print ②			
Header	& Application List Print			
Packet	Report 🕐			
Select a	I Applications V Include Authorization(s)			
	Attachment(s)			
	Add	Remove		
	Application Type			Print Attachment
	Application # 1 - Title Surrender		Yes	Yes
	Application # 2 - Transfer Title Setup		Yes	Yes
	Application # 3 - Title Surrender		Yes	Yes
			Create Su	ummary Report

Click Create Summary Report. An informational message will appear advising you the report has been queued. The report will be created behind the scenes. When it is ready you will be notified in the OLS Notification area on the Home page. The report is also accessed from this section.

Submit Packet

View Packet Content	Create Summary Report Add Interest Submit Packet Cancel Packet
1.	Click Submit Packet. The system will display the
	following confirmation screen. This page
	contains information from the packet header, a
	packet confirmation date, and an estimate of

the fees for this packet.

Packet Header Info		
Packet Information		Account Information
Submitting Party: Some G		Account 123456789
Client No: 9876543	21 Packet Type: Title Processing	Numberi
Client Ref. No:	Packet No: 200048756	
Packet Description: Some Ti		
Status: Draft	Expiry Date: 23-Oct-2008	
Confirmation Date: Wednesday, April	ave continued submission of this packet by clicking on the ' 23, 2008 10:20:42 AM	
stimated Fees:		
	t registration, this is an estimate only.)	
otal estimated fees for the packet an	e: \$200.00	

Once you have verified the accuracy of the information, click OK to submit the packet. The system takes you to the All Packets view of the Packet Management tab. The packet status will change from "Draft" to "Pending Submit."

Note: If you are unable to submit at this time or feel you would like to wait and review your application packet before submitting, you would click **Cancel**. This button will only cancel the submission of your packet (at this time) and leave your packet in draft status until you decide to submit. Your packet can be found in the Packet Management tab under either the Draft packet list or All packet list.

Note: If you want a copy of this validation, print from here.

Notables

- It is important to ensure your browser print setting is set to "Print background colors and images." If these settings are not selected, portions of the screen will not print correctly. To locate this setting in the Internet Explorer browser, select the Internet Options item under the Tools menu. When the Internet Options screen appears, click the Advanced tab and scroll down to the Printing item. Click the "Print background colors and images" check box and then click OK. Ensure that your print settings are set to landscape mode or the report will not print properly.
- Although the OLS Tool ensures that all required data (nine digit numbers, etc.) are entered and authorizations and attachments are included in your packet, it does not ensure that your authorizations and/or attachments are completed accurately.
- If you are working on a transaction, be sure to save your work before clicking on the **OLS Home** tab to prevent loss of work.
- If ISC has an email address on file for the client number you used to sign in, a copy of each notification will also be sent to that email address.
- Condo transforms cannot be handled in OLS at this time.
- When conducting a title search on the OLS Home page or on the Transfer, Interest, or Transform Tabs of the OLS Tool, you can print the search results grid.
- Each template you create is unique to the client number that you sign in with.
- The list of templates displayed is specific to the transaction that you are currently performing.

- You may receive two dialog boxes when you click **Download Cover**. If you receive the second dialog box, it is caused by a security setting in your browser and is normal.
- If the documents are submitted by fax, they should be ready for use in 10 to 15 minutes. This time frame may be longer if there is a backlog on the fax server. If the documents are submitted by mail, it could take a couple of days before they are ready for use.
- If the bar codes on the fax cover page are not readable, the documents will not be added for use in the packet. If this happens, you will receive a notification letter by fax indicating that the bar codes were unreadable. The letter will also provide details on the steps you should take to help ensure that the bar codes are readable. You will need to re-fax the documents.
- It is recommended that you view each document submitted by fax or mail to ensure that it is complete and that all pages included are submitted. To view the notification details, click the check box in the left column and then click **Details**. The notification details appear in a pop up window.
- The system generates a unique name for each document submitted by fax or mail. You may want to "rename" each document to something that is easy to identify.
- The **Packet List** displays all of the documents uploaded to the packet. The "Select Application to view uploaded documents:" drop down allows you to view the specific documents "Attached to Application As" associated with the selected application. If you have two applications listed under the drop down, for example, one application may only have an

authorization while the second may have both an authorization and an attachment.

- The system does <u>not</u> provide a dialog box to confirm the files are to be removed. The documents are removed as soon as **Remove** is clicked.
- If you have multiple applications in your packet, validate each application prior to submitting the packet.
- You will not be able to open or work on the packet until the validation has completed.
- The summary report generated when you click Create Summary Report will be for the current application only. To create a summary report for the entire packet, ensure that you create the report from the Packet Content List.