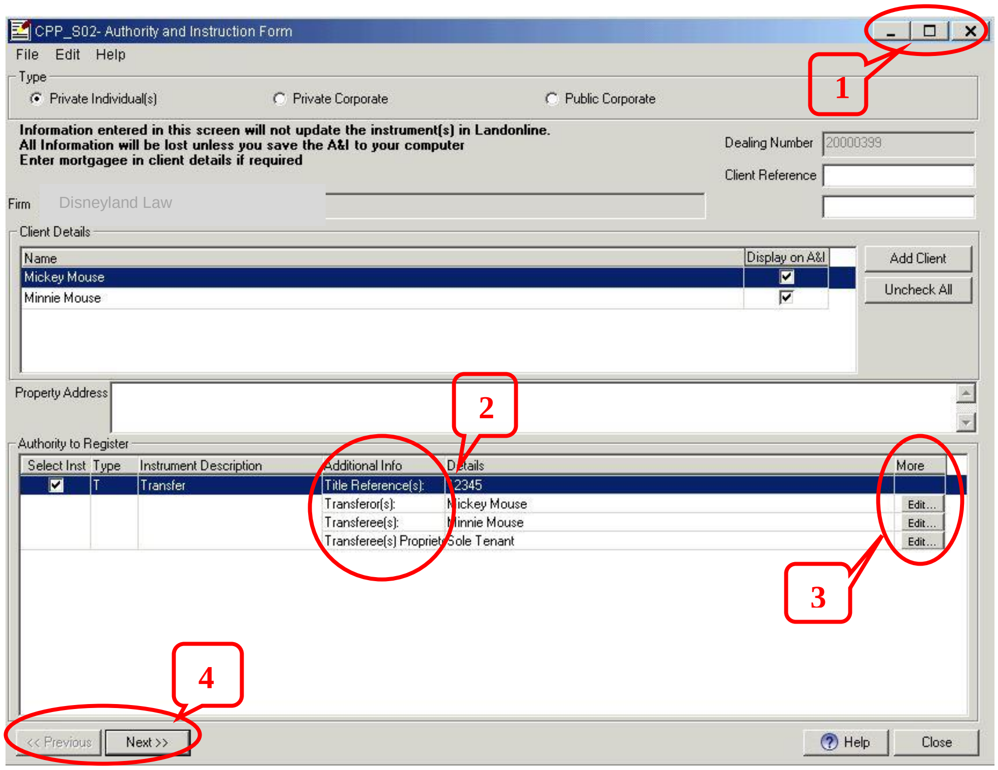
Landonline Release 3.10 update for conveyancers:

New features include**:**

- Submitting firm details updating in a rejected dealing
  Currently editing or adding an instrument to a rejected dealing may cause the submitting firm to change automatically if the submitting firm was not the default submitting firm i.e. the default submitting firm had been manually changed. This enhancement will prevent this from occurring, and the submitting firm can only be changed manually by a user from the firm submitting the dealing.
- A&I Forms - Format and Additional Text & A&I to show whether client is transferee or transferor
  A number of changes have been made to A&I forms to make them easier to edit, as well as automatically populating some fields. Changes also include displaying Transferor/Transferee for transfer instruments, All Obligations/Fixed Sum for mortgage instruments and Grantor and Grantee for easement instruments.
- Release all instruments through a single action
  This enhancement will allow users to release all instruments in a dealing in a single action, either from Workspace or from the Create Dealing screen. Instruments are still able to be released individually from each Prepare screen as per current functionality.
- Improve the management of dealings in the Workspace tree view
  This enhancement will allow users to create customised folders in the workspace tree. It will enable client references as well as dealing numbers to display in the workspace tree and it will enable sorting by dealing number or client reference. There is also provision to enter a settlement date in dealings which appears in the Workspace Summary Views and this and client reference information etc. can be used to Sort Summary views. Note - The settlement date is not passed through to LINZ.
- Transferees with the same name but different people in a Joint Tenancy
  This enhancement will change the Landonline Business rule (T085) that currently prevents signing where people with exactly the same name (e.g. father and son) are created in a Joint Tenancy in a Transfer, Transmission etc.
- Title search by Instrument number
  Currently an instrument number search returns all titles affected by that instrument regardless of whether the searched instrument is a current or historic interest. There is now the option of searching current interests, historic interests or all interests (current and historic).
- Add "care of" to Addresses for Caveat & Notice of Claim
  The current c/o functionality is not intuitive and at times leads to confusion.. This enhancement will help eliminate issues with c/o addresses and make it easier to use.
- New Transmission types to be created under s72 Property Law Act 2007
  Currently Landonline workspace does not support a transmission of survivorship pursuant to s72 Property Law Act 2007 where an 'affected proprietor' is a corporate entity and is in a (joint or combination) tenancy and its interest devolves (i.e. a company that ceases to exist). The transmission must be lodged manually. A new Transmission type 'Survivorships72 Property Law Act 2007' has been created and is able to be submitted by e-dealing.
- Display Micro help on buttons
  Current micro help displays at the bottom left of the window when an object is selected. However for buttons this micro help does not display until after the button has been selected. A small box containing the micro help information will display when buttons are hovered over.
- Add File References in My Messages
  The current 'Reference' column in the 'Message Received' tab under 'My Messages' in workspace has been made into 2 columns – 'Dealing No' and Client Reference.
- Review of screen locking for Landonline
  Previously it was not possible to navigate to other areas of Landonline when a Search window is open (e.g. CDE_S01 Search Title screen). This has now been changed so that users can navigate between other screens and the Search screens. The same applies to the CPP_S08 Insert Names window where users can navigate to other screens e.g. the Search Title screen if they need to.

<table>
<tr><td>Title</td><td>Submitting firm details updating in a rejected dealing.</td></tr>
<tr><td>LINZ Ref</td><td>SDM 274436 (JIRA LINZL-64)</td></tr>
<tr><td>Changes made</td><td>Currently editing or adding an instrument in a rejected dealing may cause the submitting firm to change automatically. This enhancement will prevent this from occurring, and the submitting firm can only be changed manually by a user from the firm submitting the dealing.</td></tr>
</table>

<table>
<tr><td>Title</td><td>A&I Forms - Format and Additional Text & A&I to show whether client is transferee or transferor</td></tr>
<tr><td>LINZ Ref</td><td>SDM 274477 & 274457 (JIRA LINZL 84 & 75)</td></tr>
<tr><td>Changes made</td><td>A number of changes have been made to the A&I screens to make them easier to edit, as well as automatically populating some fields. The updated Authority and Instruction screen displays as follows:

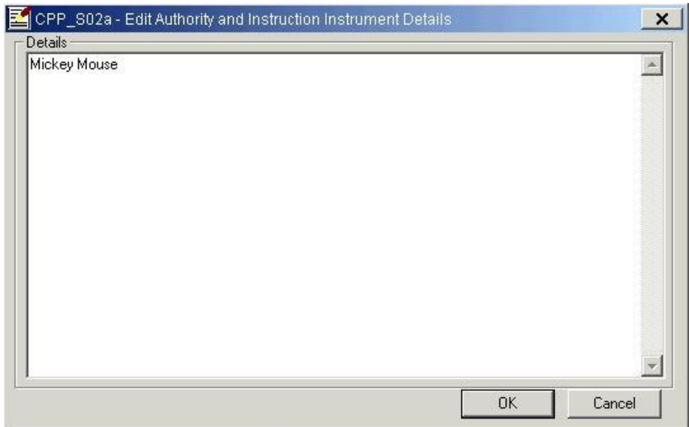


The screen has been reformatted to make better use of the available room and it is also resizable
The additional information area now automatically displays more data from the prepare screens and this flows through to the finished form e.g.

Transferors and Transferees will display for a transfer.
All Obligations/Fixed Sum details will display for a mortgage.
Where a mortgage contains additional clauses these will also display.
Provision for Grantor and Grantee names to be manually entered is provided for easement instruments.

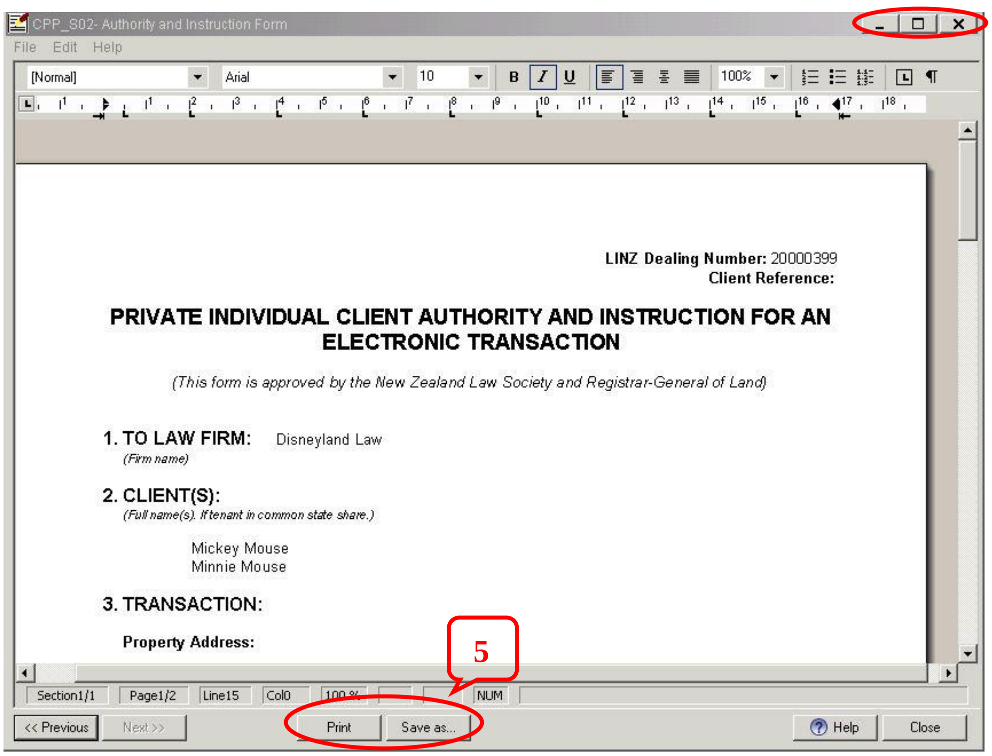
Details in the Authority to Register area can be edited directly, or a new screen can be opened by clicking the Edit button to allow edits to be made more easily e.g. for a mortgage clause.
</td></tr>
</table>

Note – edits made in the A&I screen will NOT result in updates in the Prepare screens and incorrect details should always be corrected in the Prepare screens.



4. New Previous and Next buttons. These buttons move the user between the A&I template and the A&I preview document.

The updated Authority and Instruction screen displays as follows:



The new preview document is now resizable and in an easier to edit Word type format, with editing tools available from the menu. Directly editing the document before it is saved to file is now easier.

5. You can save or print the A&I from this screen.

6. Provision has been made in the form in Section 5 for the entry of Secondary Id information (where this is required):

5. CLIENT IDENTIFICATION: *(Tick applicable ID. Person establishing identity to complete.)*

	NZ Driver Licence	Passport	NZ Firearms Licence	Other NZ government-issued photo ID
Dermot Valentine Brennan	_____	_____	_____	_____
Rachel Marie Brennan	_____	_____	_____	_____

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Secondary Identification details (if required): ____

*(**Attach** copy of ID used or details (e.g passport number) where copying not practicable.)*

I certify that:

(a) I have witnessed the client(s) sign this form;

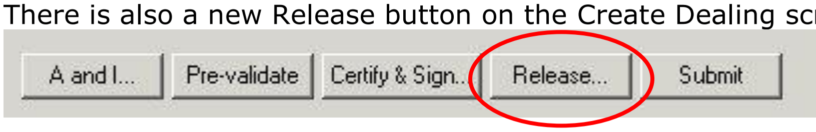
(b) I have sighted the original form(s) of identity ticked above;

Title	**Release all instruments through a single action**
LINZ Ref	SDM 274441 (JIRA LINZL-68)
Changes made	This enhancement will allow users to release all eligible instruments in a single action. Either from the workspace tree or from the Create Dealing screen.

Right clicking on a dealing in workspace will now have a new option of Release All

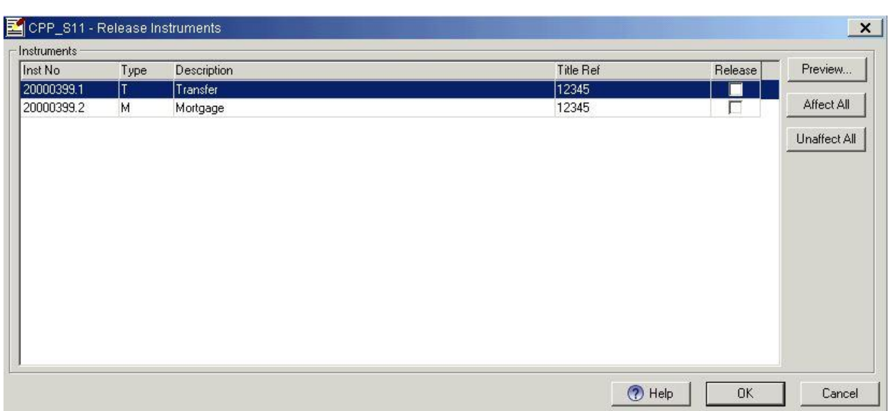
Right clicking on an instrument will also have the option of Release All along with the option to release only the selected instrument

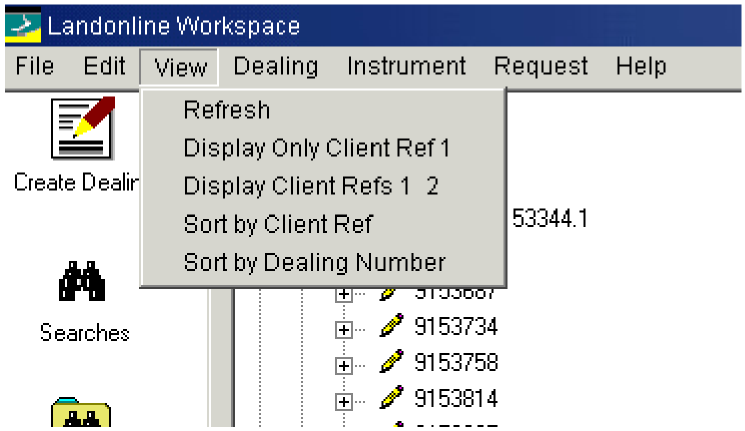
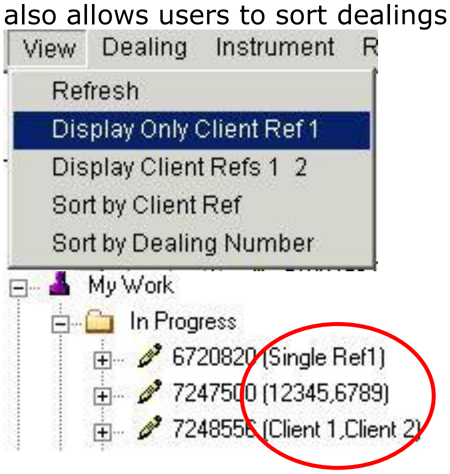
There is also a new Release button on the Create Dealing screen



Any of these options will open a new release instruments window, and allow users to select instruments for release. Only those instruments that are ready for release and that your firm is responsible for will be listed in the window.

There is an 'Affect All' button and an 'Unaffect All' button allowing users to manually select less than all of the listed instruments.



Title	**Improve the management of dealings in the Workspace tree view**
LINZ Ref	SDM 274482 (JIRA LINZL-88)
Changes made	This enhancement will allow users to customise their workspace tree. New features include: 1.The display of client references in the tree. To alter the tree display users need to access the View menu.  The menu has new options to allow users to Display only the first client ref, or both. This menu also allows users to sort dealings by dealing number or client ref.  • View/Display Only Client Ref 1: Only client reference 1 if entered will display as well as the dealing number • View/Display Only Client Refs 1 2: Both client references, or one if only one is entered will display as well as the dealing number • View/Sort by Client Ref: Client reference details will display followed by the dealing number in brackets • View/Sort by Dealing Number: The dealing number will display followed by the Client reference(s) in brackets. The display and sort options selected will affect the display of dealings in all folder Views – My Work, Favourites, All Work etc. The display option is unique for each member of the firm. When viewing dealing order under Supervised Work or All Work you see the order you have set and not the order the other person has set. Where either Client Reference 1 or 2 or both have not been entered the displayed information

will truncate accordingly

The order that dealings will display in folder views based on sorting by Client Reference is:

1. Dealings with no Client Reference 1, followed by
2. Client References starting with a numeric figure, followed by
3. Client References starting with an upper case character, followed by
4. Client References starting with a lower case character

All lists will display the first (or lowest) value at the top in the tree

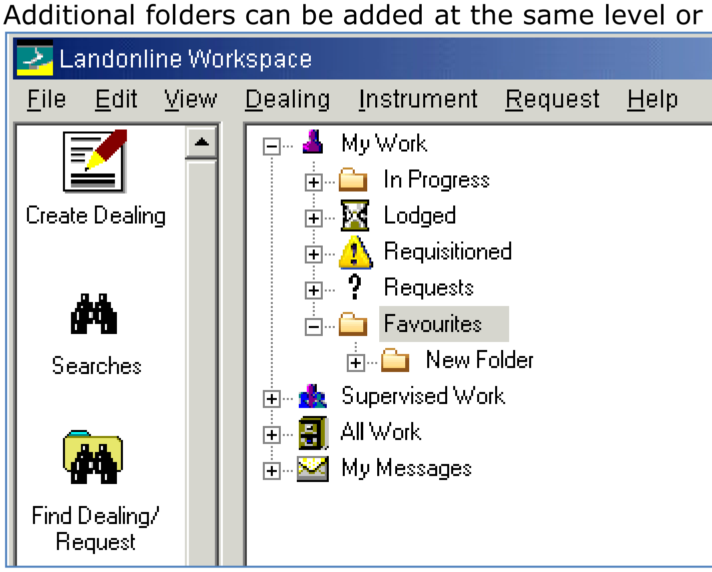
2. The addition of a new Favourites folder in the Workspace tree.
Favourite folders are used to store links to dealings to allow quick access to a dealing or to group dealings together.

You can add dealing links to Favourite folders and then access the dealings from those links.

Favourites display under My Work, Supervised Work and All Work but you can only add to and delete dealing links from Favourite folders under My Work.

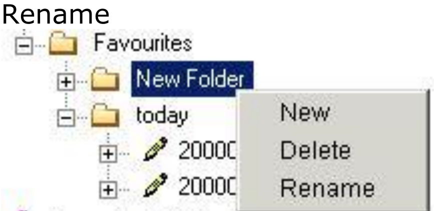
When dealing links are deleted from Favourite folders the original dealing is not affected.

When the Favourites folder is first opened it will display one subfolder called New Folder. Additional folders can be added at the same level or under this and re-named as required.



Up to 5 levels of subfolders can be added under Favourites in any folder, and multiple folders can be added at each level. Multiple dealing links can be added to each folder.

All folders under Favourites can be maintained using the right click folder options:
New
Delete
Rename



The Favourites folder cannot be deleted and only allows for new folders to be created

Folders at the same level cannot share the same name.

Links to dealings can be added to Favourites folders as follows:

- Highlighting one or more dealings
    - In the Tree,
    - In a Summary View or
    - From within the Find Dealings/ Request screen

and dragging and dropping the dealings into an existing Favourites folder

- Right clicking on a dealing
    - In the Tree,
    - In a Summary View or
    - From within the Find Dealings/ Request screen

and adding to Favourites.

Once a link to a dealing is created in a Favourites folder the link can be used to access the dealing by double clicking or by right clicking to open a menu.

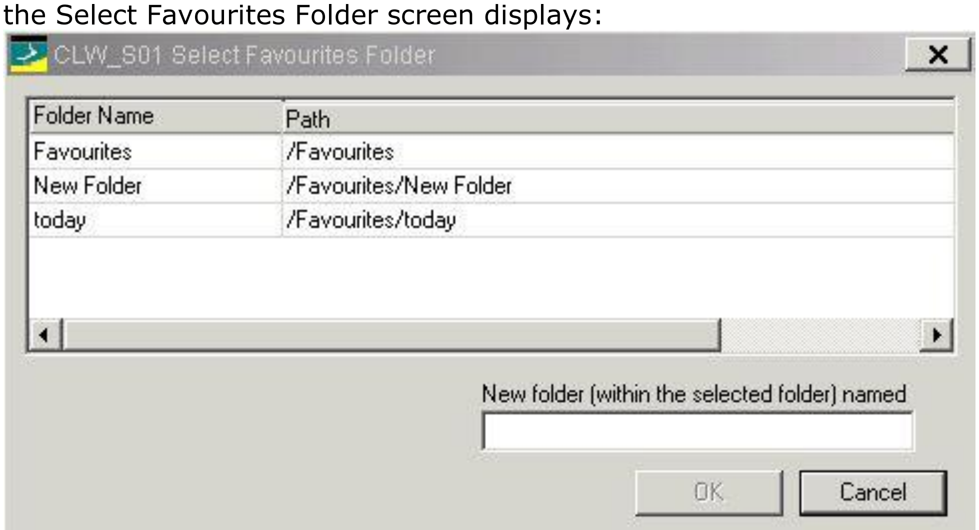
Dealing links can be moved from one Favourites folder to another by dragging and dropping.

Multiple dealing links for the same dealing can be created in different Favourites folders but a dealing link can only appear once in the same Favourites folder

When a dealing is right clicked and Add to Favourites is selected

- in the Tree,
- in a Summary View or
- From the Find Dealing/ Requests screen,

the Select Favourites Folder screen displays:



This allows the user to select the folder to add the dealing link to.

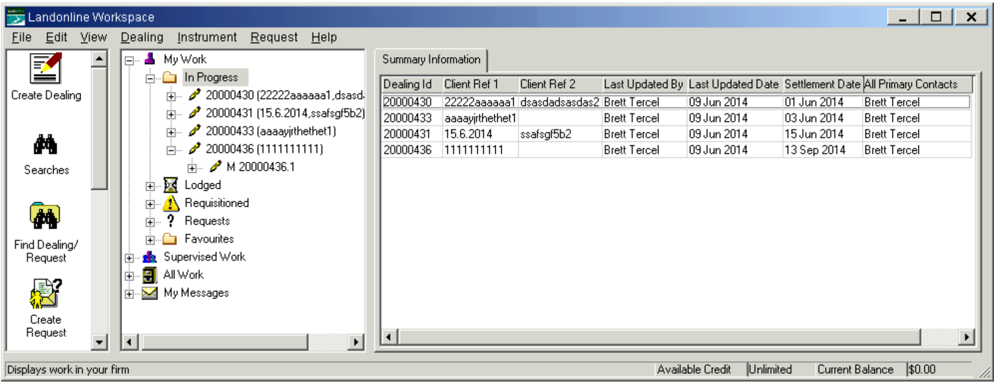
Alternately you can create a new sub folder under the selected folder and type the name of the new sub folder the dealing link is to be created in.

3. Settlement Date - The Prepare Dealing screen has a new field to allow for the recording of a settlement date. (Note that this is for information purposes only and is not passed to LINZ).

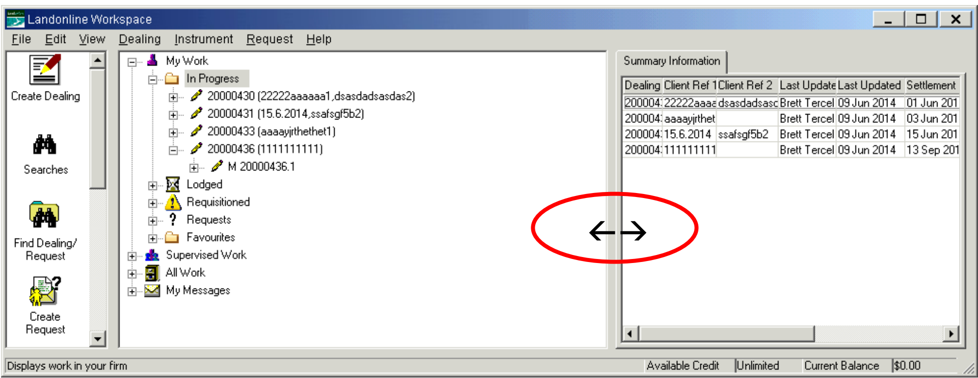
Settlement Dates entered in dealings display in Workspace Summary Views, along with Client

Reference information etc.

4. Columns in all the Summary Information windows are now sortable by clicking on the column name. This includes the Settlement Date and Client Reference columns.



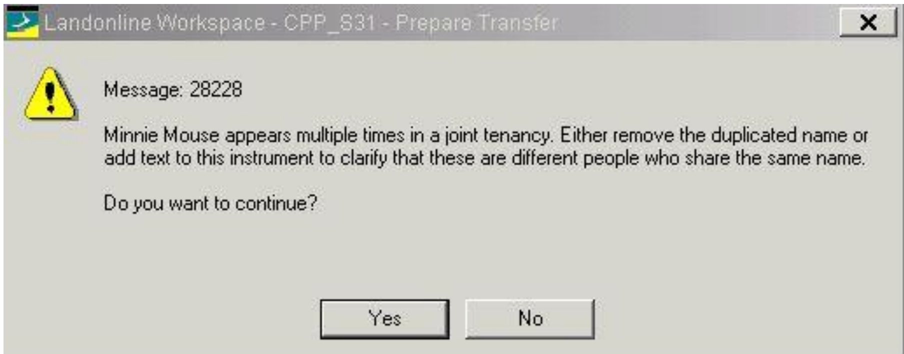
5. The width of the Tree can now be resized by hovering over the divide between the Tree area and the Detail area, then clicking and dragging the column border to the desired position.



Landonline remembers this placement for the next session.

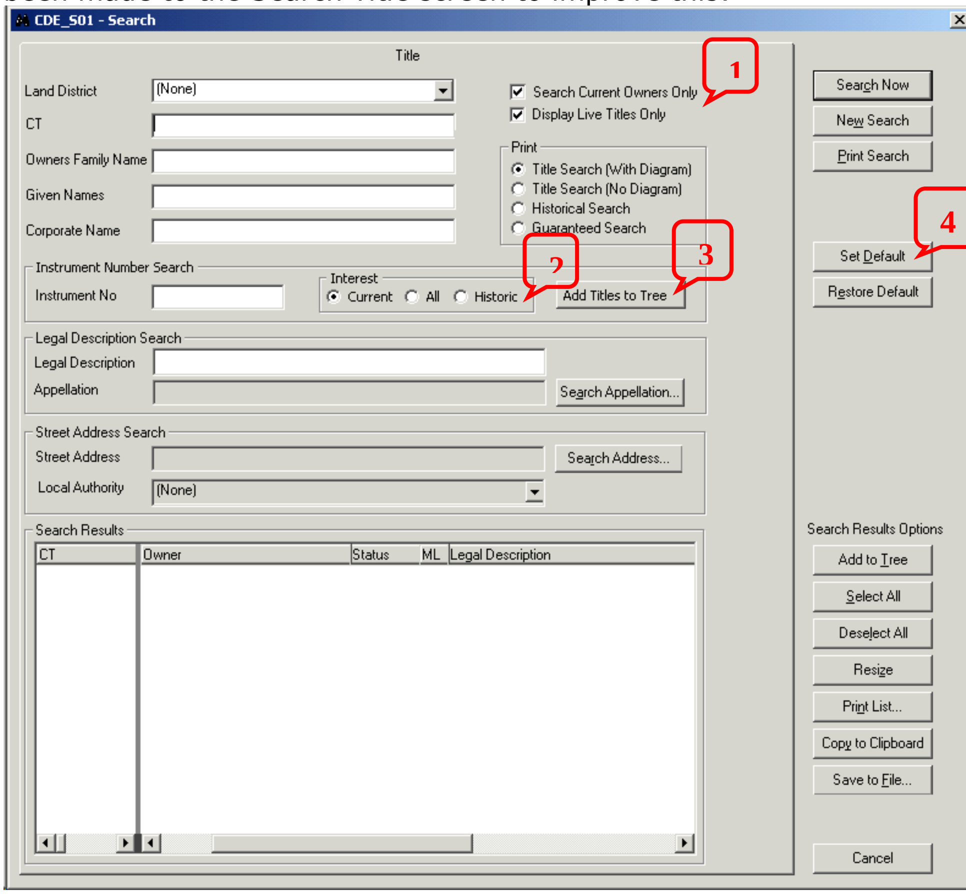
<table>
<tr><td>Title</td><td>Transferees with the same name but different people in a Joint Tenancy</td></tr>
<tr><td>LINZ Ref</td><td>SDM 274511 (JIRA LINZL-91)</td></tr>
<tr><td>Changes made</td><td>Currently an e-instrument can’t be signed where there are transferees in a joint tenancy with the same name, and the dealing has to be lodged manually.

The relevant business rule has been changed and will now display a new message if there are joint tenants with the same name in a transfer.



If text is then added to clarify, the dealing will step down for LINZ staff to process. If no text is added the e-dealing will reject.</td></tr>
</table>

<table>
<tr><td>Title</td><td>Title search by Instrument number</td></tr>
<tr><td>LINZ Ref</td><td>SDM 273428 (JIRA LINZL-52)</td></tr>
<tr><td>Changes made</td><td>Currently an instrument number search returns all titles affected by that instrument regardless of whether the searched instrument is a current or historic interest. A number of changes have been made to the Search Title screen to improve this:



1. ‘The Search Current Owners Only’ and ‘Display Live Titles Only’ boxes have been moved to the top of the screen above the Print options to better align the screen

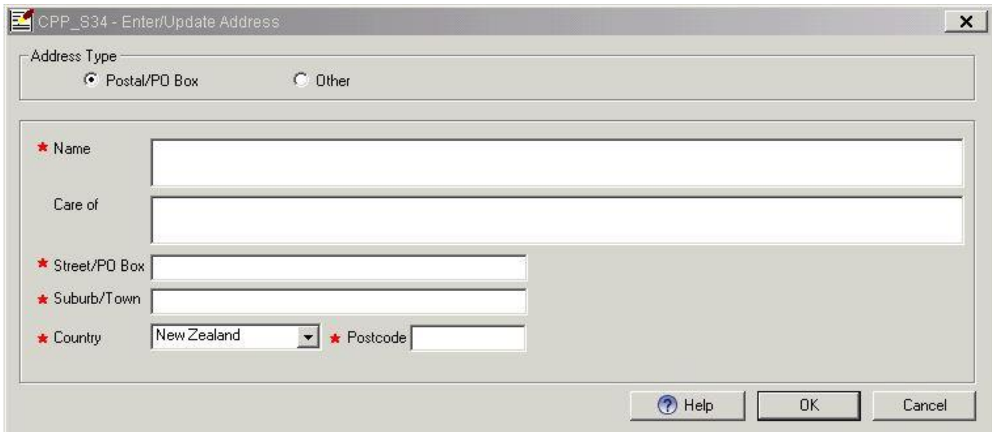
2. Three new radio buttons have been added to allow users to filter searches for titles based on instrument numbers, by the instrument status:
• Current Interests – ‘Current’
• Historic Interests – ‘Historic’
• Both Current or Historic Interests – ‘All’

3. The “View Instrument” button has been relabelled “Add Titles to Tree”

4. Users are able to set their preferences (including the instrument radio button options) as a default search setting.</td></tr>
</table>

<table>
<tr><td>Title</td><td>Add “care of” to Addresses for Caveat & Notice of Claim</td></tr>
<tr><td>LINZ Ref</td><td>SDM 272388 (JIRA LINZL-34)</td></tr>
</table>

<table>
<tr>
<td>Changes made</td>
<td>
The current c/o functionality is not intuitive and at times leads to confusion when addresses are created in Caveats and Notices of Claim. This enhancement will help eliminate issues with c/o addresses and make it easier to use. The Enter/Update Address screen has had the “Name/Care of” field renamed as “Name” and a new “Care of” field created.

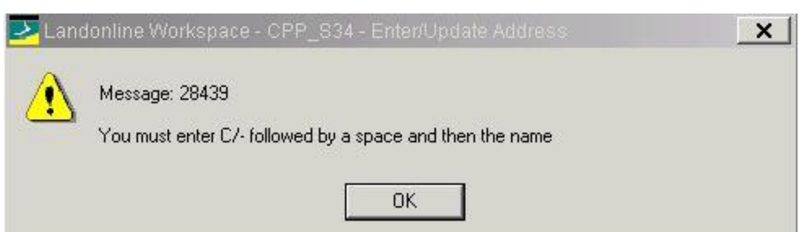


Both these fields will wrap over two lines and have a character limit of approximately 250. (Note that the display of the address that is returned to the Prepare Caveat or Prepare Notice of Claim screen will truncate to approximately 150 characters, however full details can still be viewed in the this screen and in the instrument preview).

If the mode is changed between Postal/PO Box and Other modes, the name and C/- data will transfer to the new mode.

Clicking in the “Care of” field will cause it to display “C/- ” (note there are 4 characters including a “space”). If the user exits the field without making any edits, the “C/- ” will be removed.

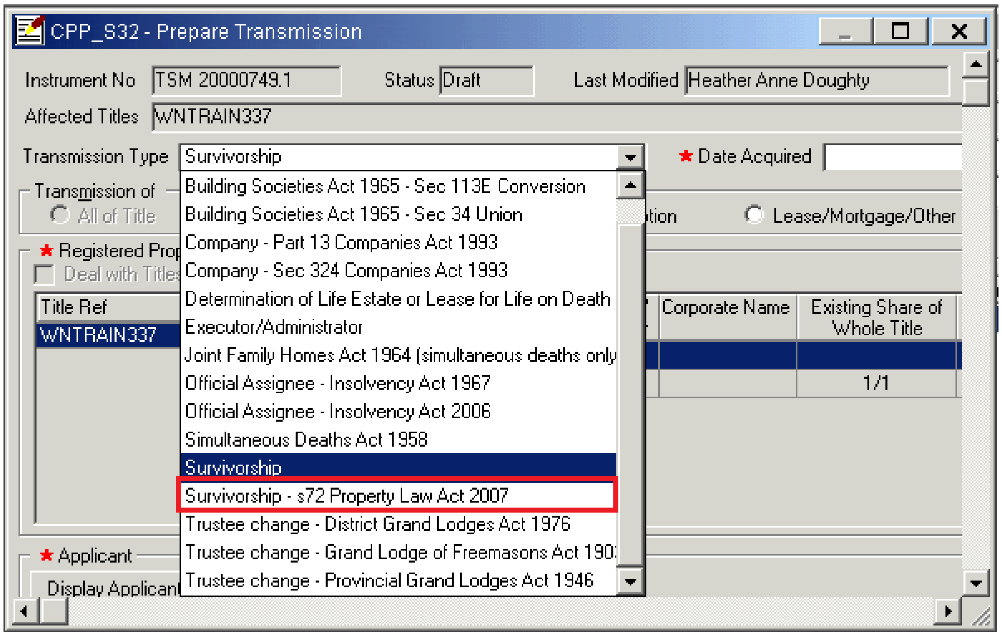
Additionally if the Care of field is edited the data will be validated on clicking OK and if the first four characters are not “C/- ”, an error message will appear.



</td>
</tr>
</table>

<table>
<tr><td>Title</td><td>New Transmission types to be created under s72 Property Law Act 2007</td></tr>
<tr><td>LINZ Ref</td><td>SDM 274516 (JIRA LINZL-96)</td></tr>
<tr><td>Changes made</td><td>

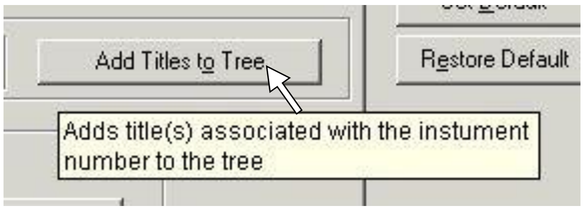
A new Transmission type ‘Survivorship – s72 Property Law Act 2007’ will be available in the drop down list in the Prepare Transmission screen for those situations where a corporate entity is in (joint or combination) tenancy and it’s interest devolves as defined in s72 Property Law Act 2007. The new type will display directly under the ‘Survivorship’ type.



When the new Transmission type is selected the screen works in a similar mode to the existing Survivorship Transmission i.e. the Affected Company is selected and the Display applicant button is used to populate the survivors.

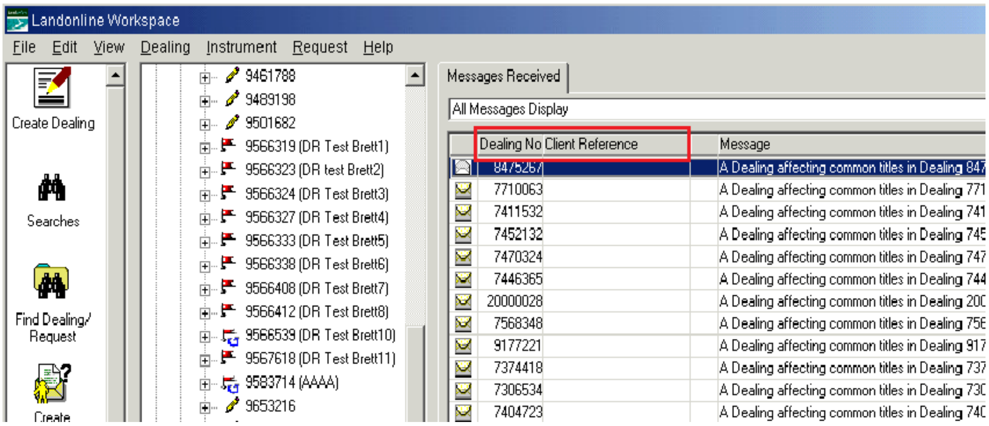
Business rules have been updated for this Transmission type to ensure that transmissions of individuals are not processed..

</td></tr>
</table>

Title	**Display Microhelp on buttons.**
LINZ Ref	SDM 284136 (JIRA LINZL-343)
Changes made	Current micro help displays at the bottom left of the window when an object is selected. However for buttons, micro help does not display until after the button has been selected. A small box containing the micro help information will display when buttons are hovered over. 

<table>
<tr><td>Title</td><td>Add File References in My Messages</td></tr>
<tr><td>LINZ Ref</td><td>LINZL-71</td></tr>
<tr><td>Changes made</td><td>

The current ‘Reference’ column in the ‘Message Received’ tab under ‘My Messages’ in workspace has been replaced with 2 columns – ‘Dealing No’ and Client Reference. (JIRA LINZL – 71)

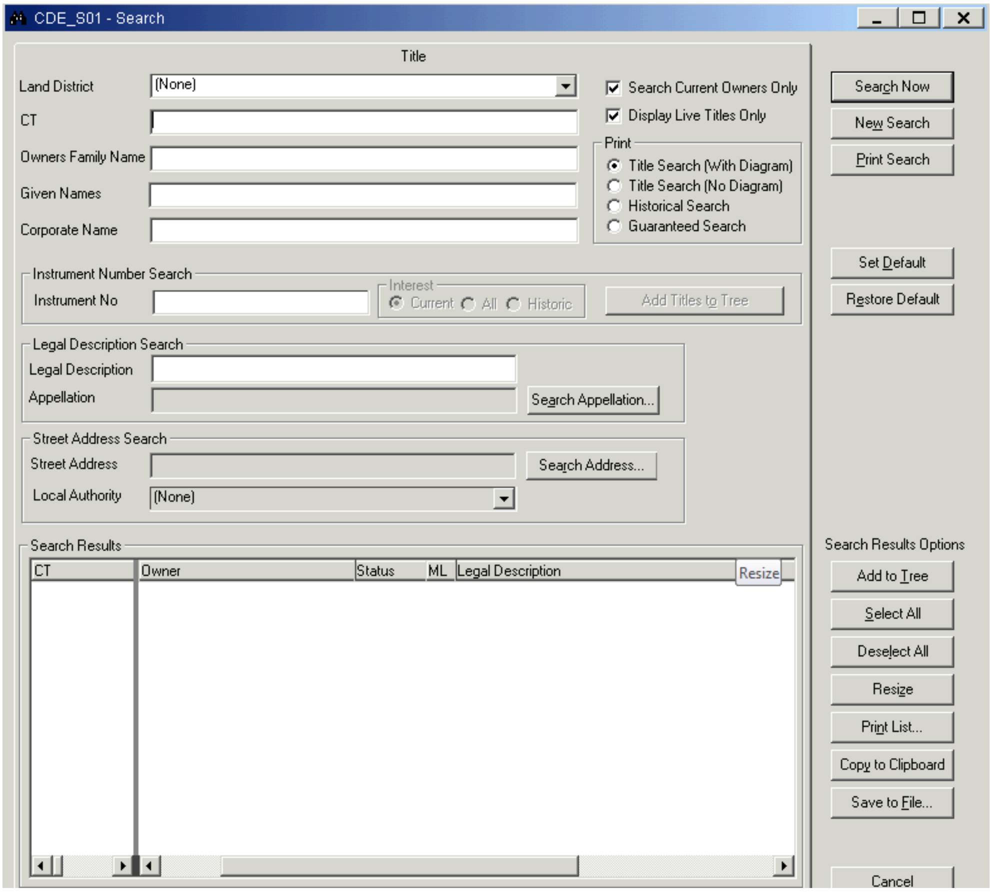


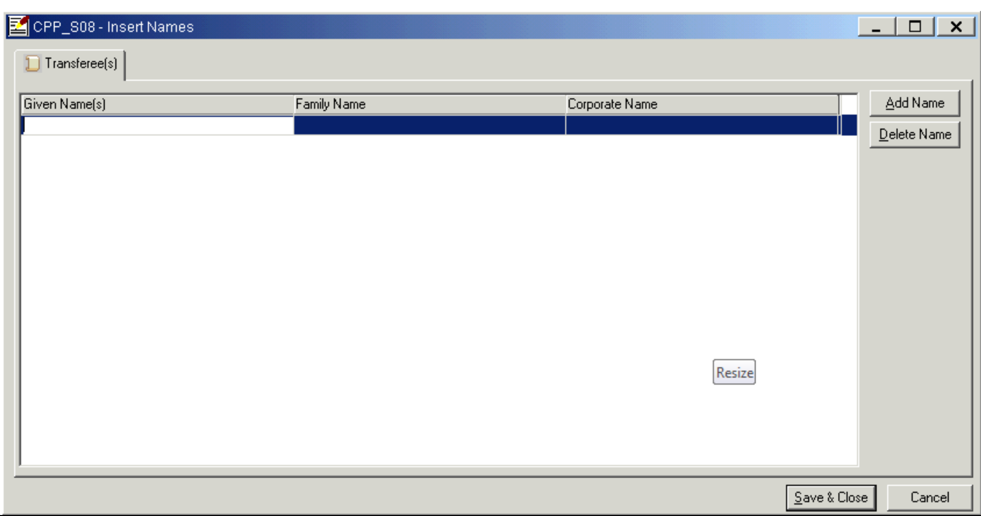
These columns are able to be sorted by clicking on the column name.

Note – There are times when the 2 fields are blank. This will occur when no client ref has been entered for a dealing. Also rows relating to notices do not contain the dealing number. When either column is used to sort the contents of the ‘Messages Received’ section the blanks will all either appear at the top, or when the column is clicked again, the client ref blanks will be listed at the top and the notice blanks will be listed at the bottom.

</td></tr>
</table>

Title	**Review of screen locking for Landonline**
LINZ Ref	SDM 274476 (JIRA LINZL-83)
Changes made	Some Landonline screens when opened act as locks and prevent access to other screens until those screens are closed. To improve usability changes have been made to allow wider access to multiple screens at the same time. Its now possible to navigate to other windows in Workspace when either the CDE_S01 Search window the CPP_S08 Insert Names window open are open (examples follow):





	Note: Some users may find that when signing, the Unlock Certificate File window used to enter the passphrase may now

appear at the top left of the monitor, rather than in the centre.