6 REQUESTS

6.1 Overview

A Conveyancing user can create title related requests in Landonline from Workspace and send them to LINZ to process.

The request types available are:

- Titles – Application to Sustain Caveat (S145/A145)
- Titles – Correction
- Titles – Correction Prevents Registration
- Titles – Dealing Correspondence
- Titles – Requisition_Rejection Clarification
- Titles – Requisition_Rejection Review
- Titles – TA Amalgamation Consultation
- Titles – Trustee Change
- Titles – Withdraw Dealing
- Titles – Withdraw Instrument

Note: To send a request to withdraw an *e-dealing* or instrument, you must be allocated the Withdraw Dealing privilege. Your System Manager can assign this privilege to you, if required.

This chapter explains about requests and how to create and send a request. Specifically it describes how to:

- create different types of requests
- perform other actions for a request (eg attach an image, preview, print, edit and delete)
- send a request.

6.1.1 About requests

A Conveyancing user can create a request in Landonline from Workspace and when in the Create Dealing screen. When created from the Create Dealing screen, the dealing number will default to the *e-dealing* you are currently in. You can change this if required.

You normally create a request for an *e-dealing* from the firm you are currently logged on with. Some request types (eg Titles - Application to Sustain Caveat (S145/A145) allow you to reference a dealing from another firm. Landonline displays a warning message to advise you. When the referenced dealing is from another firm, only users in your firm can view the request (ie users from the firm of the referenced dealing cannot view it). A withdrawal type of request must always reference a dealing from your firm.

All uncompleted requests display in the Requests folder in Workspace. If a request is linked to an *e-dealing* it will also display in the Workspace tree under the *e-dealing* at instrument level (until the *e-dealing* has been registered).

If you link an *e-dealing* to a request, the client references entered for the linked *e-dealing* (if any) are automatically transferred to the client reference field(s) in the request. Any changes you make to these client references will not transfer back to the Create Dealing screen.

When you save a request the details that display alongside the request in the Workspace tree depend on the information entered in the Create Request screen. This can be the:

- Dealing Number referenced (eg RQST 50001592)
- Client Reference 1 entered (eg RQST HAL7982)
- User Id of currently logged in user (eg RQST mdobson001) if neither of the above are entered.

You can attach the image of a letter (in a .tif or .pdf file format) to all types of requests except a request to withdraw an *e-dealing* or instrument. Once attached, you can preview the image in the Image Viewer within the Preview Instrument/Request screen.

To send a request to withdraw an *e-dealing* or instrument you must have been assigned the Withdraw Dealing privilege and be from the submitting firm. You cannot withdraw an instrument from an *e-dealing* if it is the last remaining instrument (or the only instrument) in the dealing. In this instance you must withdrawn the dealing.

When there is more than one party to an *e-dealing* with a linked request, you can only view requests created by your firm.

You can edit or delete a request from Workspace at any time before you send the request to LINZ.

When you send the request to LINZ they action it and respond by communicating any changes to you by email. You can also receive an online message when the result of the linked request finalises a *e-dealing*. In some instances Landonline will action the request automatically without intervention from a LINZ staff member. The confirmation you receive for a Withdrawal type of request depends on whether it is automatic or manual:

- For an automatically withdrawn *e-dealing* you receive a message immediately to advise the request is completed. You also receive a Withdrawal from Registration Confirmation notice by your preferred method of delivery.
- For an automatically withdrawn instrument you receive an email with a copy of the instrument attached. You also receive a Withdraw Instrument notice by your preferred method of delivery.
- For a manual withdrawal or any type of manual request, you receive an email from a LINZ staff member and a notice (eg Withdrawal of Dealing notice) if appropriate.

6.1.1.1 Uncompleted requests

All uncompleted requests display in the Requests folder in Workspace until completed. Any request linked to an *e-dealing* will also display in the Workspace tree under the *e-dealing* at instrument level.

When an uncompleted request is linked to a finalised *e-dealing*, the request will remain in the Requests folder in Workspace until completed.

6.1.1.2 Completed requests

Landonline automatically removes a completed request from the Requests folder in Workspace.

When a completed request is linked to an *e-dealing* it will remain in the Workspace tree under the (linked) dealing folder until the *e-dealing* has a final status (eg Registered).

Request to Withdraw a Dealing:

- If the *e-dealing* to be withdrawn is an AUTO REG *e-dealing* which has been submitted and queued, Landonline removes the dealing from the queue and automatically withdraws it.
- If the *e-dealing* to be withdrawn is a LODGE *e-dealing* that has yet to be assigned to an LINZ staff member, Landonline automatically withdraws the *e-dealing*. If already assigned, the request will be processed by a LINZ staff member.
- If the dealing to be withdrawn is a Manual dealing that has yet to be assigned to a LINZ staff member, Landonline automatically withdraws the dealing. If already assigned, the request will be processed by a LINZ staff member.

Request to Withdraw an Instrument:

- If the instrument to be withdrawn is linked to an AUTO REG *e-dealing* which has been submitted and queued, Landonline automatically withdraws (ie removes) the instrument from the *e-dealing*.
  Note: If the following instrument(s) in the *e-dealing* are dependent on the withdrawn instrument(s), this can cause the *e-dealing* to be subsequently rejected.
- If the instrument to be withdrawn is linked to a LODGE *e-dealing* that has yet to be assigned to an LINZ staff member, Landonline automatically withdraws the instrument. If already assigned, the request will be processed by a LINZ staff member.
- If the instrument to be withdrawn is linked to a Manual dealing, the request will always be processed by a LINZ staff member.

Fees for a withdrawn instrument or dealing:

- AUTO REG *e-dealing* (submitted and queued) - fee charges will be automatically credited to you for each withdrawn instrument and charges will be automatically cancelled for a withdrawn *e-dealing*.

- LODGE *e-dealing* - if the request arrives before the linked *e-dealing* has been assigned to a LINZ staff member, fee charges will be automatically credited or cancelled (ie the same as for a submitted and queued AUTO REG *e-dealing*). Once assigned to a LINZ staff member, fee charges will be the same as for a Manual dealing.
- Manual dealing:
  - Fees for a **Withdraw Dealing** request – whether the dealing is automatically withdrawn or a LINZ staff member withdraws it, the fees will automatically update to Cancel.
  - Fees for a **Withdraw Instrument** request - the fees are not automatically credited. The LINZ staff member will manually credit the fees for the instrument to be withdrawn.

6.2 Create and send a request

You can create a request for specific title related matters using the Create Request screen and send for processing.

You can save and/or edit the request at any time before sending. Any user in your firm can view details of a request created by you.

Steps:

The high level steps required to create and send a request are:

1. Display the Create Request screen.
2. Record details of a request.
3. Perform other actions for a request.
4. Send the request.

The following headings correspond with these steps and explain them in more detail.

6.2.1 Display the Create Request screen

You create a request using the Create Request screen.

When the Create Request screen displays, the Dealing Number field contains a list of all current dealings created by your firm (ie manual dealings, draft *e-dealings* in Workspace and submitted *e-dealing*) that have yet to be finalised (eg registered). Any Client Reference entered for each *e-dealing* displays next to the dealing number in the drop down list.

Mandatory fields in the Create Request screen are marked with a **red** asterisk (*****) and must be completed before sending.

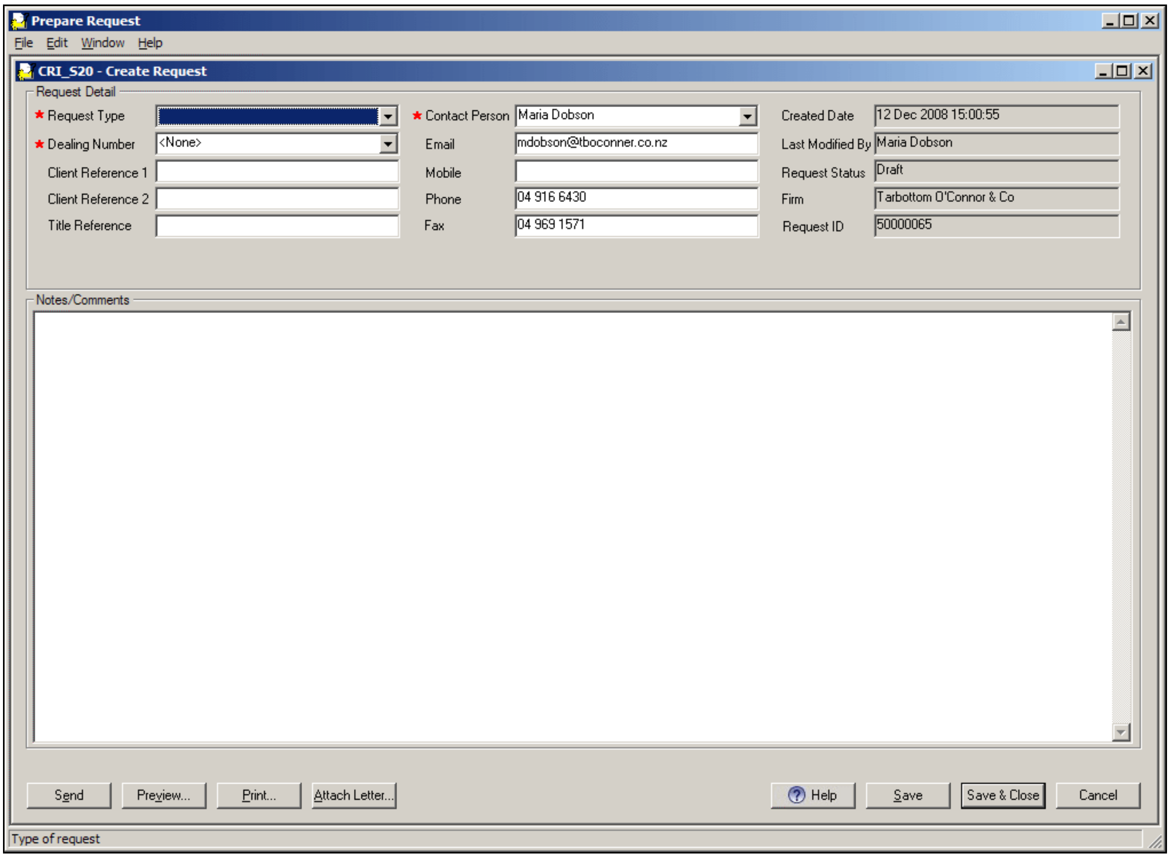
Tasks:

You can:

- Display the Create Request screen from Workspace.
- Display the Create Request screen from the Create Dealing screen.

The following headings correspond with these tasks and explain them in more detail.

6.2.1.1 Display the Create Request screen from Workspace



To create a request in Workspace:

1. Click  (Create Request) to display the Create Request screen.

6.2.1.2 Display the Create Request screen from the Create Dealing screen

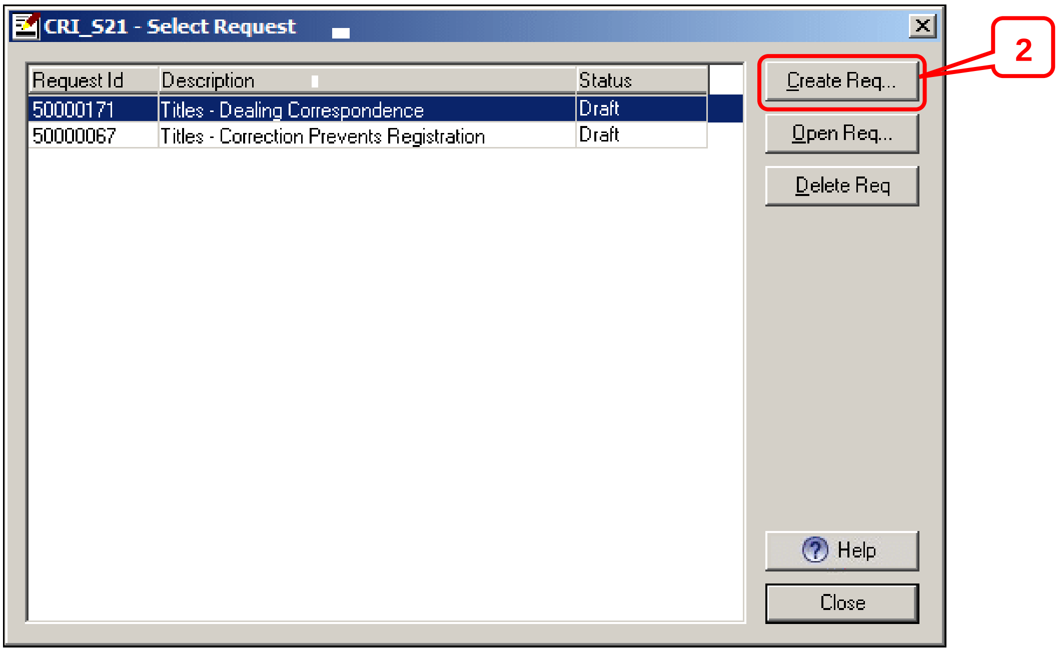
When you create a request while in the Create Dealing screen, the Select Request screen displays to allow you to continue to create the request.

The Select Request screen lists all requests linked to the current *e-dealing*. You use the Select Request screen to:

- Create a new request.

- Open an existing request linked to the current *e-dealing*.
- Delete an existing request linked to the current *e-dealing*.

Note: You can only edit or delete a request before it has been sent for processing.



To create a request in the Create Dealing screen:

1. Select Dealing | Requests... to display the Select Request screen.
2. Click Create Req... to display the Create Request screen.

Note: The Dealing Number defaults to the current *e-dealing*. If this is a new request which is not linked to the current *e-dealing*, enter a different dealing number or select the dealing number from the drop down list.

6.2.2 Record details of a request

The details you complete for a request depend on the type of request you select.

Tasks:

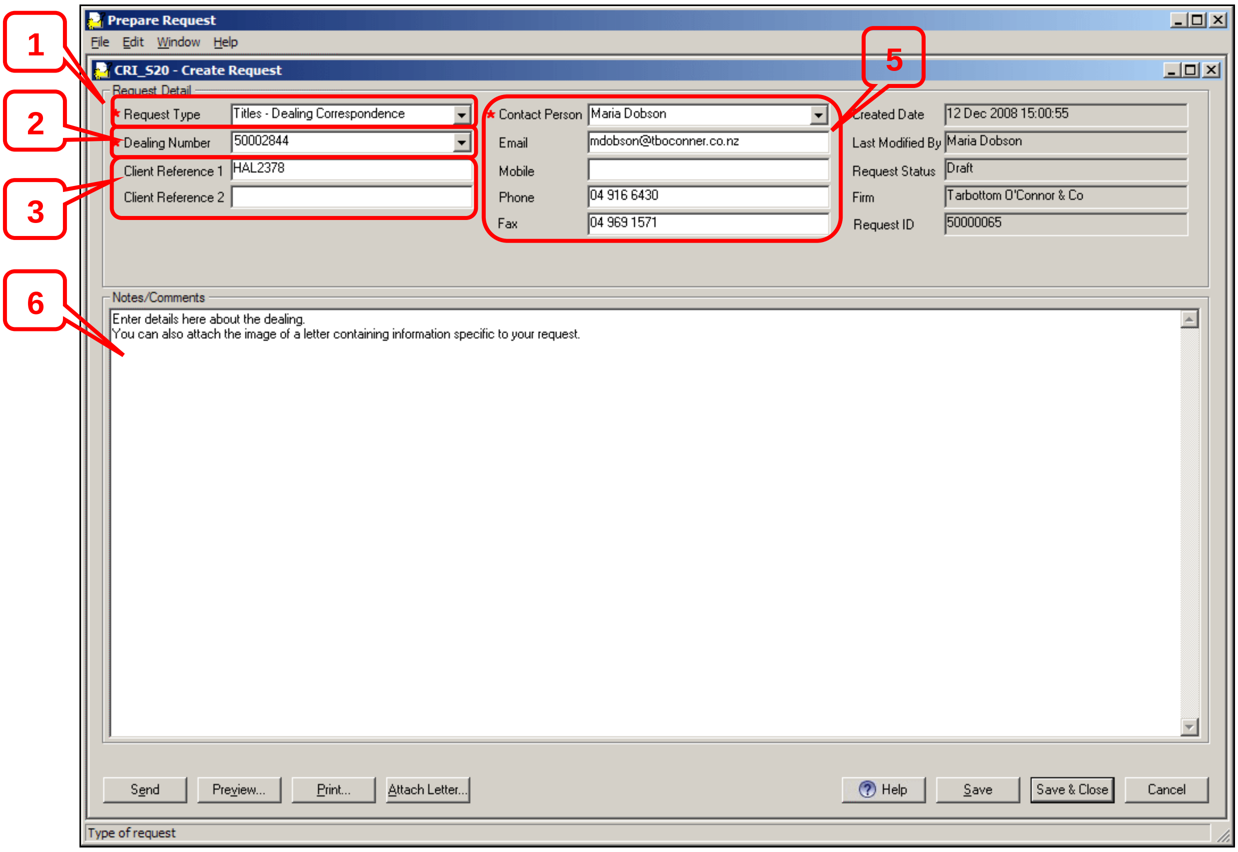
The tasks you can perform to record a request are:

- Record and save the request details.
- Select titles affected by the request (if required).
- Record a title correction request.
- Record a withdrawal request.

The following headings correspond with these tasks and explain them in more detail.

6.2.2.1 Record and save the request details

The type of request you select determines the fields that display in the Create Request screen.



To record details of the request, in the Create Request screen:

1. Select request from the drop down list in the Request Type field. If you select:
   - a title correction request type, see **6.2.2.3 Record a title correction request**.
   - a withdrawal request type, see **6.2.2.4 Record a withdrawal request**.
2. Enter the Dealing Number or select the dealing number from the drop down list (if required). Any client reference entered for a dealing will also display in the drop down list next to the dealing number.
   - If you opened the screen from the Create Dealing screen, the dealing number defaults to the current *e-dealing*. You can change this if required.
3. Enter or change the client reference for the request in the Client Reference fields, if required.
4. Click in or tab to the Title Reference field to display the Enter Titles screen and select the affected titles (if required). See **6.2.2.2 Select titles affected by the request**. This field does not display for a Titles - Dealing Correspondence request.
5. Change the name of the Contact Person (if required) and check the email, Mobile Phone or Fax are correct. These fields default to details recorded in Landonline for the selected contact person and you can change them if required.

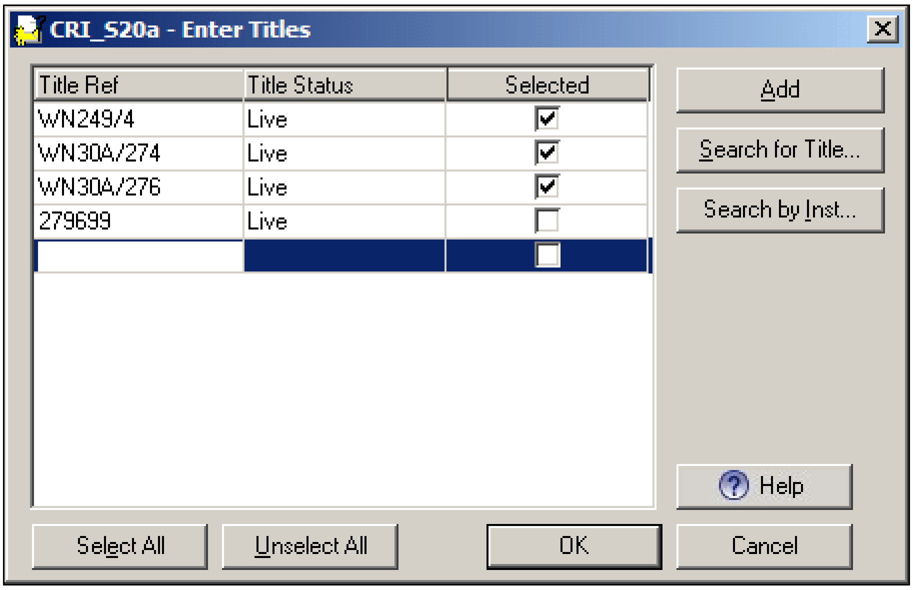
- If the name of the Contact Person does not display in the drop down list, enter the person's name and complete the Email, Mobile Phone or Fax fields as appropriate.

6. Enter details for the request in the Notes/Comments field. You can enter up to 2000 characters in this field.
7. Perform other actions for the request, as required. See **6.2.3 Perform other actions for a request**.
8. Save the request:
   - Click Save to save the request and remain in the screen.
   - Click Save & Close to save the request and return to the previous screen.

6.2.2.2 Select titles affected by the request

The Title Reference field displays in the Create Request screen for most request types. This allows you to add any title(s) affected by the request. You use the Enter Titles screen to select and add the affected title(s) to the Create Request screen.

It is mandatory to enter a title reference for a Titles – Correction request and Titles – Correction Prevents Registration request.



To select titles affected by the request:

1. In the Create Request screen, click the Title Reference field (or Tab to this field) to display the Enter Titles screen.
2. Select or enter the title(s) affected by the request:
   - If the request is linked to a dealing, check the Selected checkbox next to each title affected.
   - If the request is not linked to a dealing, enter the title reference in the Title Ref field and press Tab or click elsewhere in the screen. Landonline checks the Selected checkbox for the title reference.
   - To add another title reference, click Add and enter the Title Ref.

3. To search for the title reference (if necessary):
   - Click Search for Title... to display the Search Title screen (see **5.2.5.3.2 Search for the title reference**) and select the title to add to the Enter Titles screen, or
   - Click Search by Inst... to display the Search Title by Instrument screen (see **5.2.5.3.3 Search by instrument for the title reference**) to select an instrument number and add all titles associated to the instrument to the Enter Titles screen.
4. Check the list of titles to ensure the correct titles are checked as being affected by the request. If required:
   - check or uncheck the Selected checkbox for each title, or
   - click Unselect All Unselect All to uncheck all affected titles then check the Selected checkbox for those titles affected, or
   - click Select All if all titles are affected.
5. Click OK to return to the Create Request screen.

Note:

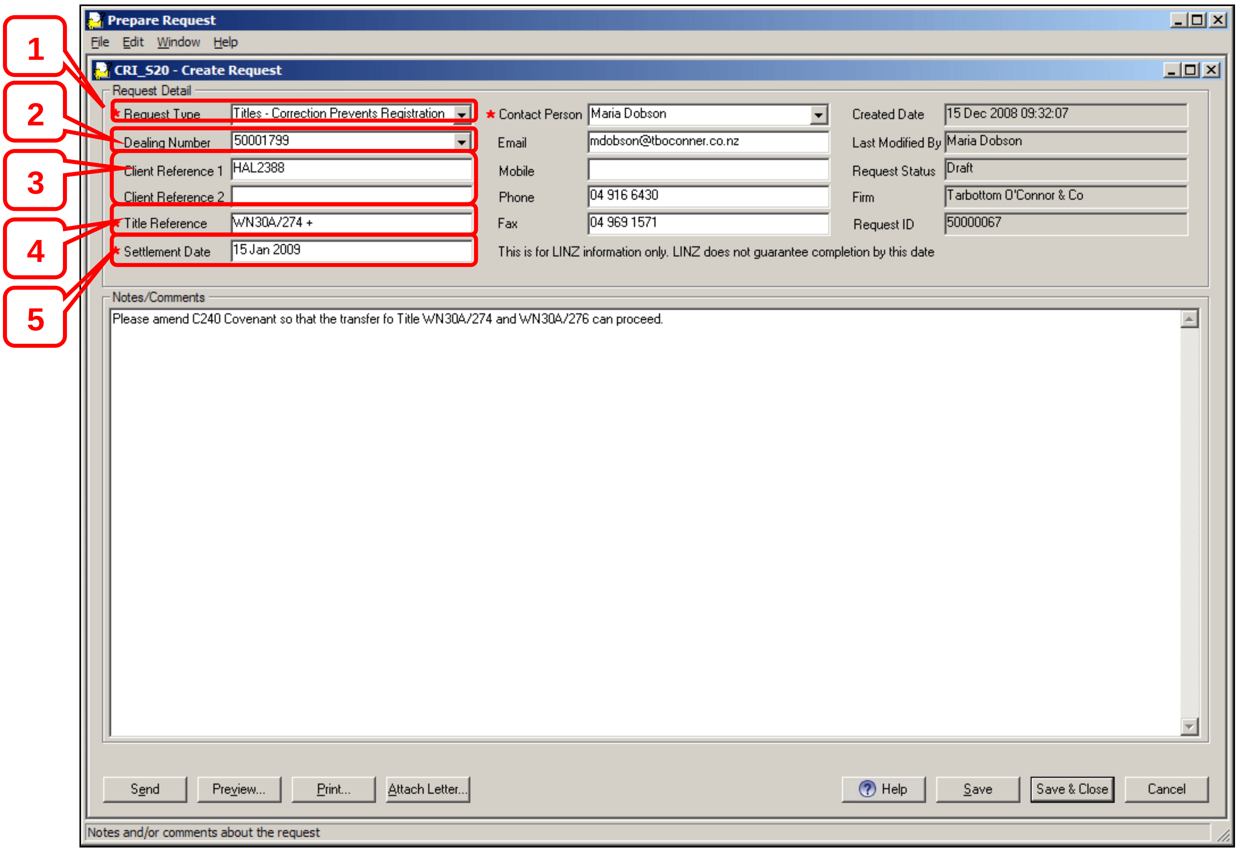
- If the request is linked to a Dealing Number Landonline displays all titles affected by that dealing.
- When more than one title is affected by the request, a plus sign (+) displays after the reference in the Title Reference field in the Create Request screen.

6.2.2.3 Record a title correction request

When you notice there is an error on one or more titles you can create a Title Correction request in the Create Request screen. There are two title correction request types:

- Titles – Correction
  Use this type of request when the correction is not urgent. It is optional to link this request to an *e-dealing*, but it must be linked to a title.
- Titles – Correction Prevents Registration
  Use this type of request when an error will prevent settlement or prevent registration of the *e-dealing*. It is optional to link this request to an *e-dealing*, but you must enter a title reference and settlement date.

Mandatory fields in the Create Request screen are marked with a **red** asterisk (*****) and must be completed before sending.



To complete details of a title correction request type, in the Create Request screen:

1. Select the type of title correction in Request Type field drop down list (ie Titles – Correction Prevents Registration or Titles – Correction).
2. Enter the Dealing Number or select the dealing number from the drop down list (if appropriate).
3. Enter or change the client reference for the request in the Client Reference fields, if required. (Any client references previously entered for the selected *e-dealing* display here.)
4. Click in or tab to the Title Reference field to display the Enter Titles screen and select the affected titles (if required). See **6.2.2.2 Select titles affected by the request**.
5. Enter the date of settlement for the *e-dealing* in the Settlement Date field. This field only displays for a Titles – Correction Prevents Registration request type.
6. Follow steps 5 to 8 in **6.2.2.1 Record and save the request details** to complete your request.

Note: The Settlement Date is a guideline for LINZ only and does not guarantee that the request will be completed by this date. The date entered cannot be more than 60 days in the future.

6.2.2.4 Record a withdrawal request

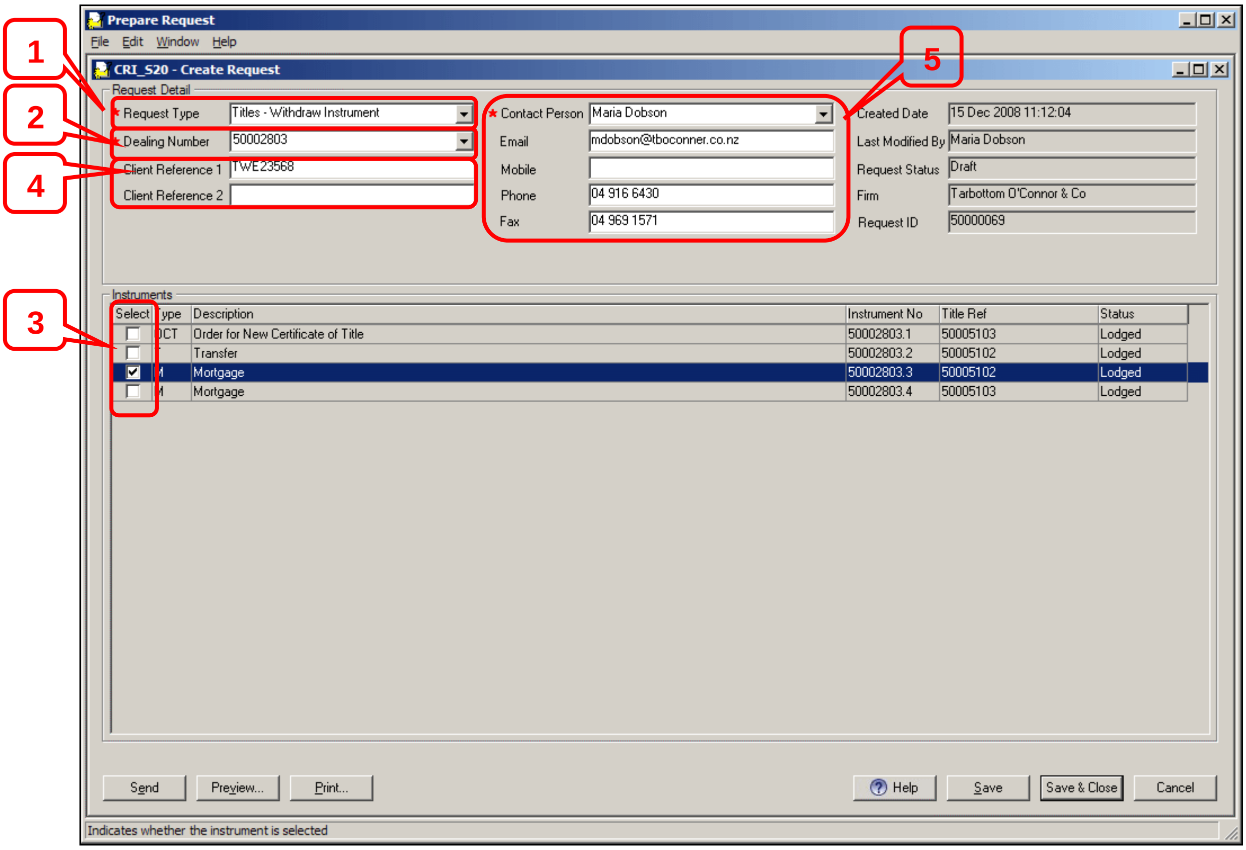
There are two types of withdrawal request you can create in the Create Request screen:

- Titles –Withdraw Instrument
- Titles –Withdraw Dealing

You must have the Withdraw Dealing privilege assigned to you to send these request types. Your System Manager can assign this to you if required.

You can only request to withdraw an *e-dealing* or instrument that is from your firm and only before the dealing reaches a final status (eg Registered, Requisitioned, etc).

Mandatory fields in the Create Request screen are marked with a **red** asterisk (*****) and must be completed before sending.



To complete details of a withdrawal request type, in the Create Request screen:

1. Select the type of withdraw in the Request Type field drop down list (ie titles – Withdraw Instrument or Titles – Withdraw Dealing).
2. Enter the Dealing Number or select the dealing number from the drop down list (if appropriate). Landonline displays a list of all instruments for the selected dealing in the Instruments area.
3. Check the Select checkbox in the Instruments area for each instrument you want to withdraw from the *e-dealing* for a Titles – Withdraw Instrument request.

- All instruments default to checked for a Titles – Withdraw Dealing request and cannot be unchecked.

4. Enter or change the reference for the request in the Client Reference fields (as required).
5. Change the name of the Contact Person (if required) and check the Email, Mobile Phone or Fax are correct. These fields default to details recorded in Landonline for the selected contact person and you can change them if required.
   - If the name of the Contact Person does not display in the drop down list, enter the person's name and complete the Email, Mobile Phone or Fax fields as appropriate.
6. Follow steps 7 and 8 in **6.2.2.1 Record and save the request details** to complete your request.

Note:

- You cannot add comments and notes or attach an image to a withdrawal request.
- For a Titles – Withdraw Instrument request, ensure that the remaining instruments in the *e-dealing* are not dependent on the instrument(s) selected to be withdrawn.

6.2.3 Perform other actions for a request

Tasks:

The tasks you can perform to record a request are:

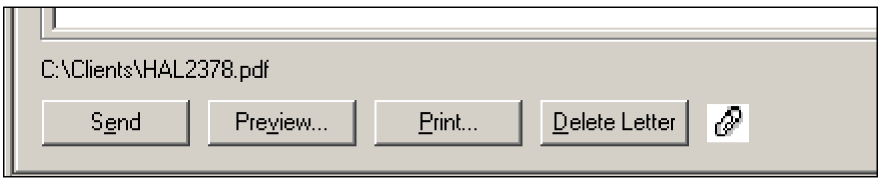
- Attach an image to a request.
- Preview a request.
- Preview a request with an image attached.
- Print a request.
- Edit request details.
- Delete a request.

The following headings correspond with these tasks and explain them in more detail.

6.2.3.1 Attach an image to a request

When creating a request in the Create Request screen, you can attach one scanned image (in a .tif or .pdf format). When you select a .pdf file to attach, Landonline converts it to .tif format before attaching it.

You can attach an image to all request types except for Titles – Withdraw Dealing and Titles – Withdraw Instrument requests.



To attach an image to a request, in the Create Request screen:

1. Click Attach Letter... to display the Select File screen.
2. Select the image file to attach.
3. Click Open to attach and generate the image and return to the Create Request screen.

Note: When you attach an image to a request Attach Letter... label changes to Delete Letter and (paper clip) displays next to the button to indicate there is an image attached. The filename and path display above Send.

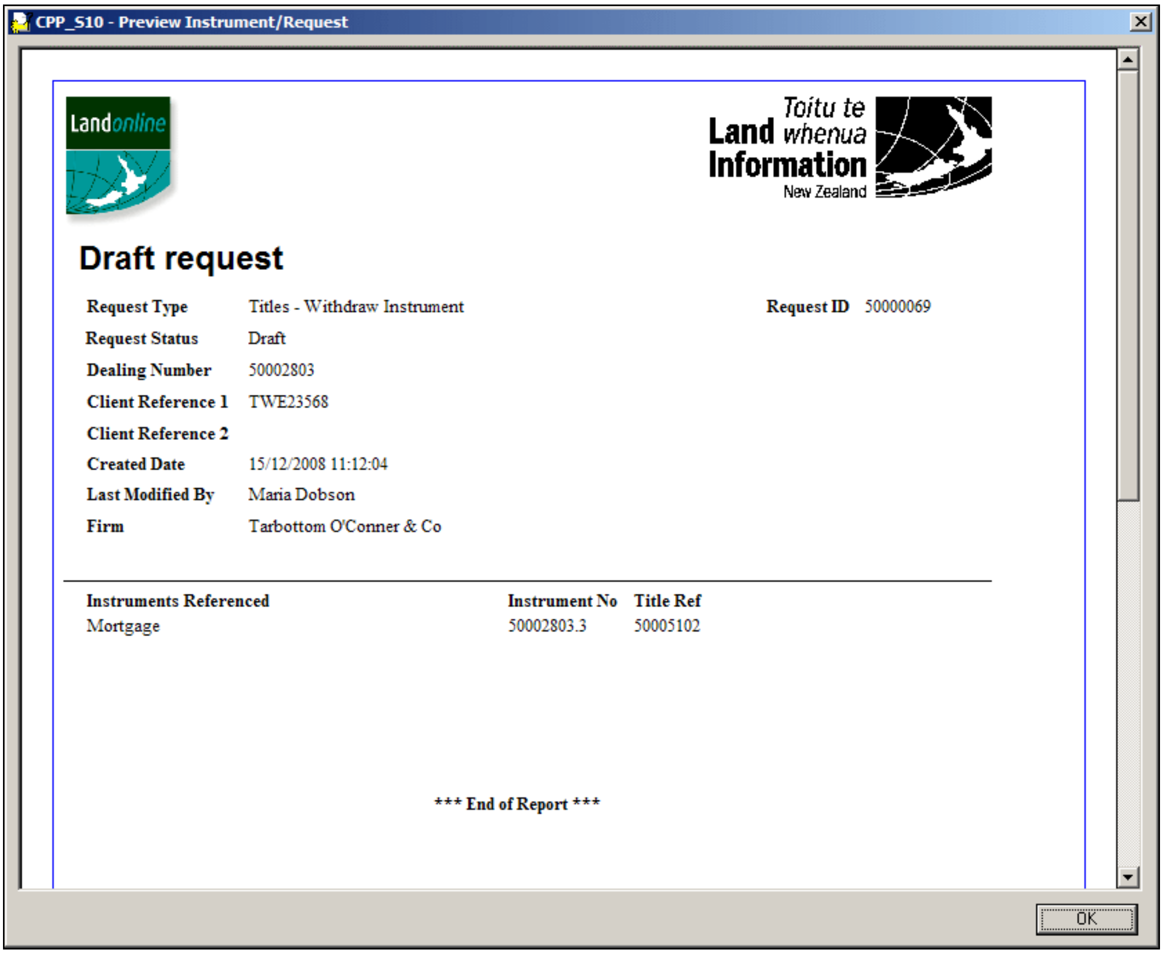
To delete an image attached to a request, in the Create Request screen:

1. Click Delete Letter. A message displays asking you to confirm.
2. Click No to cancel deletion, or click Yes to remove the attached letter image.

Note: Once you delete an attached image from a request, Landonline removes (paper clip) next to Delete Letter and changes the button label back to Attach Letter....

6.2.3.2 Preview a request

You can preview a request while preparing the request in the Create Request screen using the Preview Instrument/Request screen. You can also preview a sent request as long as it displays in Workspace.



To preview a request, in the Create Request screen:

1. Click Preview... to display the Preview Instrument/Request screen.
2. Scroll to view all details, if required.
3. Click OK to return to the Create request screen.

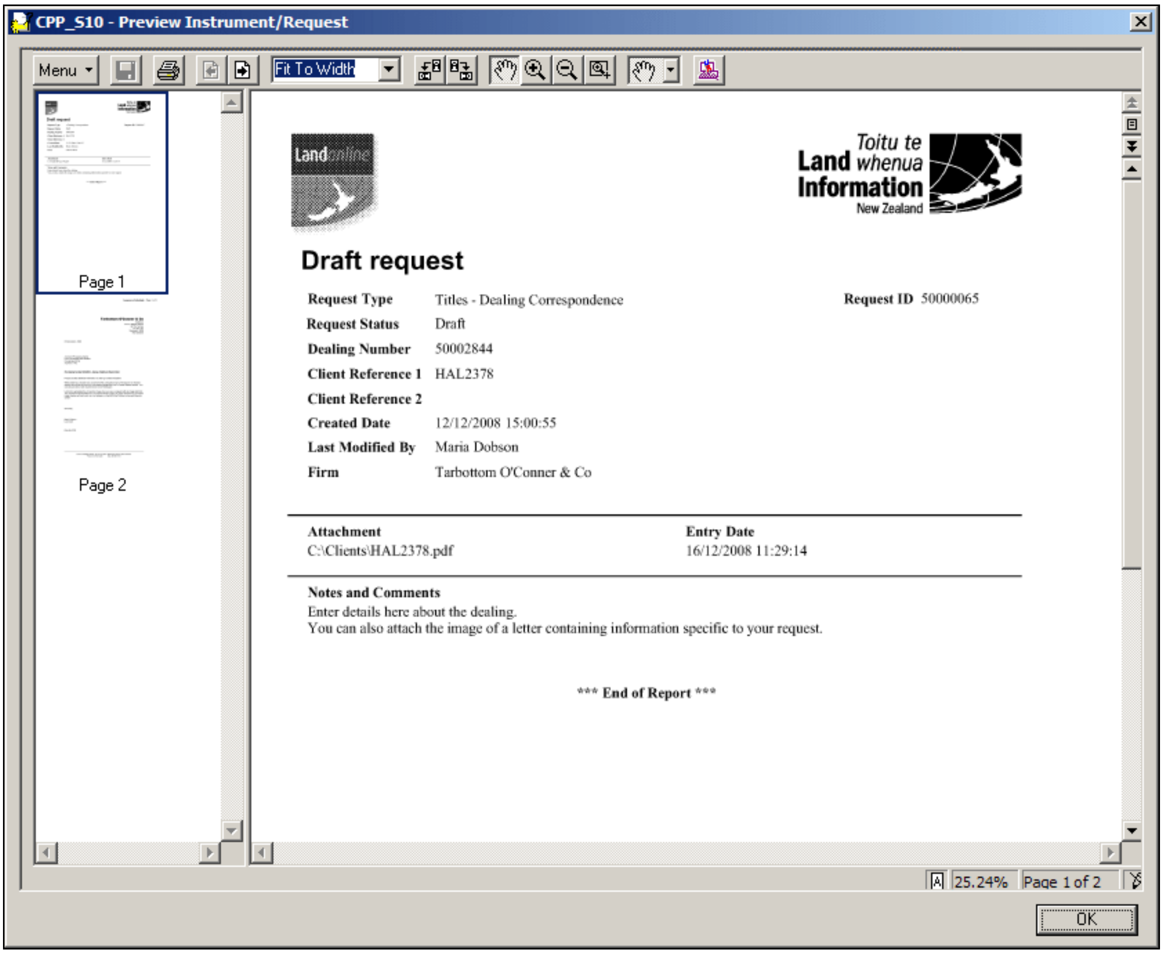
6.2.3.3 Preview a request with an image attached

While preparing a request you can preview the composite image of the request (ie request structured text view plus the attached image file) from a Create Request screen. The preview displays in the Image Viewer within the Preview Instrument/Request screen.

Landonline generates the composite image when you save a request with an image attached. The previewed request defaults to the request header page. All pages that form the composite image display as thumbnails (ie small images) on the left of the Preview Instrument/Request screen.

The composite image of the request will regenerate each time you preview the request. It is not saved in Landonline.

You can also preview a sent request with an image attached as long as it displays in Workspace.



To preview a request with an image attached, in the Create Request screen:

1. Click Preview... . Landonline generates the composite image and displays it in the Image Viewer within the Preview Instrument/Request screen.
2. To view another page, double click the page in the thumbnail panel to display it in the main panel.
   - Alternatively, click (Next page) and (Previous Page) to move between pages.
3. Click OK to return to the Create request screen.

Note:

- The total number of pages in a composite image displays in the bottom right of the Preview Instrument/Request screen.
- For more information about the functions available when viewing an image, refer to the ***e-search* User Guide**.

6.2.3.4 Print a request

You can print the structured text view of a request from the Create Request screen.

When you select a request with an image attached, it generates and displays a preview of the composite image (ie request detailed structured text view plus the attached image file) in the Image Viewer within the Preview Instrument/Request screen. You then print the request (including the attached image) from this screen.

You can also print a request without opening the Create Request screen using the right mouse menu in the Workspace tree. For more information, see **Appendix I: Menu options**.

To print a request in the Create Request screen (no image attached):

1. Click Print
2. Select File | Print... to continue to the UniPrint Preview screen (if this option is selected in your UniPrint settings).
   - The UniPrint Preview screen displays with a preview of the highlighted Print Job (or page).
3. Click Print.
4. Click Print to display the Print screen (if this option is selected in your UniPrint settings).
5. Select your print options.
6. Click Print.

To print a request with an image attached, in the Create Request screen:

1. Click Print. Landonline generates the composite image and displays it in the Image Viewer within the Preview Instrument/Request screen.
2. Click (Print) in the Image Viewer.
3. Select File | Print... to continue to the UniPrint Preview screen (if this option is selected in your UniPrint settings).
   - The UniPrint Preview screen displays with a preview of the highlighted Print Job (or page).
4. Click Print.
5. Click Print to display the Print screen (if this option is selected in your UniPrint settings).
6. Select your print options.
7. Click Print.

Note: You can set your computer to preview items in UniPrint or Acrobat Reader. The steps above are for UniPrint. To print from Acrobat Reader, select File | Print… For more information, go to the e-search area of the Landonline website and select Printing, using the spatial window and viewing images FAQs and tips.

6.2.3.5 Edit request details

You can edit the saved details of a saved request at any time before you send it for processing. You can edit a request from:

- Workspace, or
- the Create Dealing screen.

To edit a request in Workspace:

1. Select the request in the Workspace tree (expand Requests sub-folder or a Dealing sub-folder, if required).
2. Select Request | Open... to display the Create Request screen.
3. Edit the request details as required. For more information, see **6.2.2 Record details of a request**.
4. Click Save to save the request or click Send to send the request.

To edit a request in the Create Dealing screen:

1. Select Dealing | Requests... to display the Select Request screen.
2. Select the request.
3. Click Open Req... to display the Create Request screen with details of the request.
4. Edit the request details as required. For more information, see **6.2.2 Record details of a request**.
5. Click Save to save the request or click Send to send the request.

Note: For more information about the Select Request screen, see **6.2.1.2 Display the Create Request screen from the Create Dealing screen.**

6.2.3.6 Delete a request

You can delete a request any time before is has been sent for processing.

When you delete a request that is linked to an *e-dealing*, Landonline removes it from the *e-dealing* folder and from the Requests folder.

To edit a request in Workspace:

1. Select the request in the Workspace tree (expand Requests sub-folder or a Dealing sub-folder, if required).
2. Select Request | Delete. Landonline displays a message.
3. Click Yes to confirm deletion of the request, or No to cancel deletion.

To delete a request in the Create Dealing screen:

1. Select Dealing | Requests... to display the Select Request screen.
2. Select the request.

3. Click Delete Req. Landonline displays a message.
4. Click Yes to confirm deletion of the request, or No to cancel deletion.

Note: For more information about the Select Request screen, see **6.2.1.2 Display the Create Request screen from the Create Dealing screen.**

6.2.4 Send a request

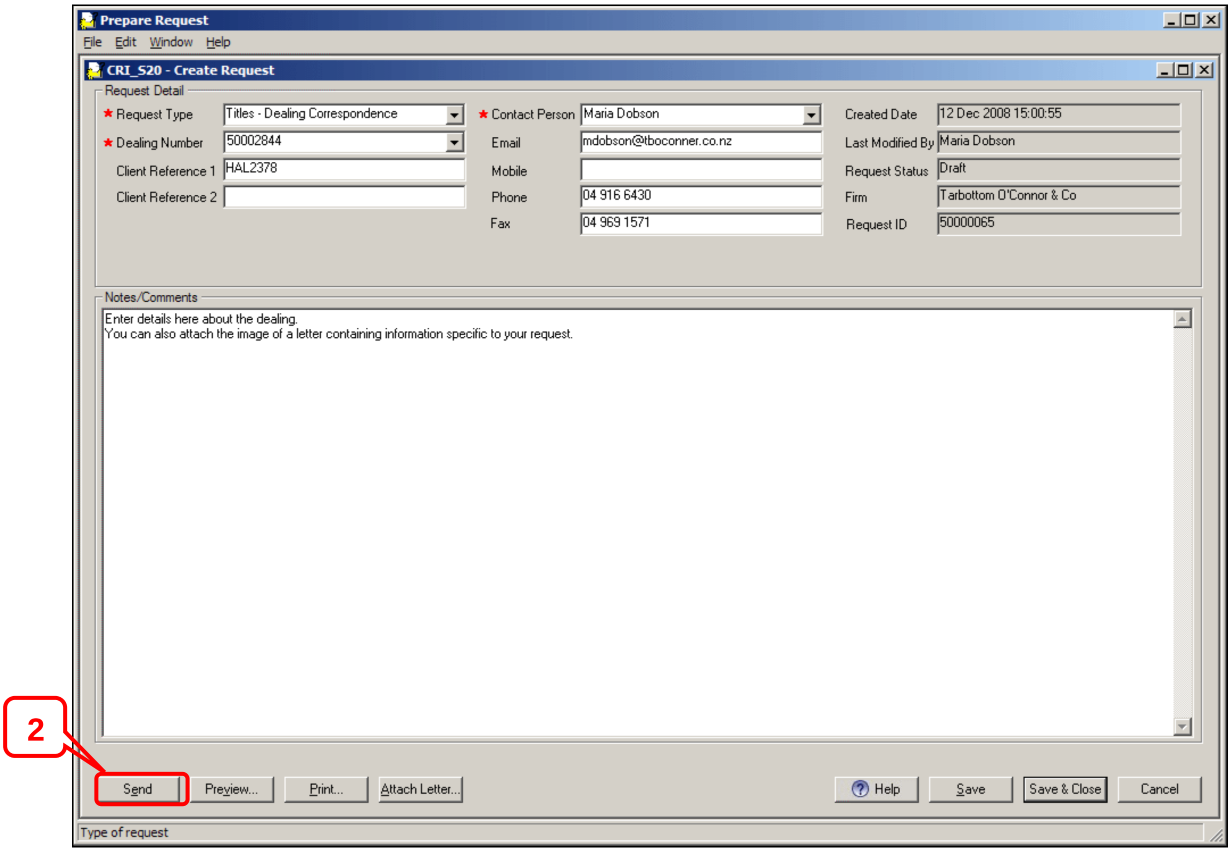
Once all details of your request have been entered and any image file attached (if appropriate) you can send it for processing.

Whether your request will be processed by a LINZ Internal user or automatically by Landonline depends on the details of the request (eg type of request, status of the linked *e-dealing*, etc).

When Landonline automatically actions a request successfully (ie withdraw dealing or instrument) the status automatically changes to Complete. Landonline removes the request from all folders in Workspace unless it is linked to an *e-dealing* that has yet to be finalised. For more information, see **6.1.1 About requests**.

After sending a request to withdraw an instrument or dealing, the confirmation you receive depends on the type of withdrawal and whether is automatic or manual:

- For an automatically withdrawn *e-dealing* you receive a message immediately to advise the request is completed. You also receive a Notice of Withdrawal in My Messages in Workspace.
- For an automatically withdrawn instrument you receive an email with a copy of the instrument attached.
- For a manual withdrawal or any type of manual request, you receive an email from a LINZ staff member and a notice (eg Withdrawal of Dealing notice) if appropriate.



To send a request, in the Create Request screen:

1. Check the details of the request are complete.
2. Click Send. A message displays asking for confirmation.
3. Click Yes to send.
   - If the request is to withdraw an instrument or *e-dealing* and the request can be actioned automatically by Landonline, a second message displays to advise (eg Dealing 50000020 has been withdrawn). Click OK to close the message.

Note: You can send a request from Workspace without opening the Create Request screen by selecting the request and using the Request | Send menu option, or using the Send option in the right mouse menu.

6.2.5 Create and save request Toolkit

Table 6-1 lists other tools that assist with creating and sending requests.

Tool	Description
Quick Reference Cards	Section: Workspace Topic: Requests

Table 6-1 Create and send request Toolkit resources