

Teranet Manitoba

Plan Deposit Submission User Guide



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Purpose

This user guide provides a basic overview of the main functions and features of Plan Deposit Submission (PDS). The PDS online service is your access point for submitting survey plans for deposit and examination.

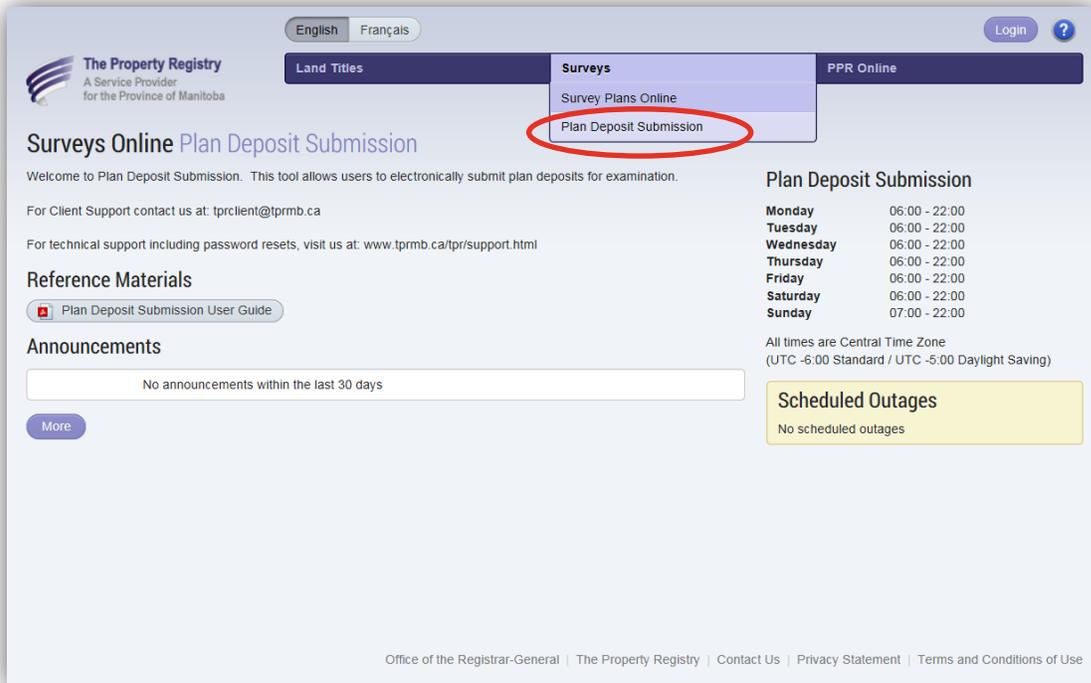
Browser requirements

Please visit our website for the most recent browser requirements.

PDS landing page

- The PDS landing page provides useful information such as:
 - Hours of operation
 - PDS maintains regular hours of operations during statutory holidays
 - Scheduled outages and outage notifications
 - Announcements
- The *Plan Deposit Submission User Guide*
- From the landing page you can navigate between:
 - English and French
 - Land Titles (TOL, Documents Online, eRegistration), Surveys (Plan Deposit Submission and Survey Plans Online), and Personal Property Registry Online
- The bottom of this page (as well as every page of PDS) provides other useful links including:
 - The Office of the Registrar-General
 - Our website
 - Contact information
 - Our privacy statement
 - Terms and conditions of use
- You can view our contact page by selecting the  icon, which is located next to the Login button.
The Login icon is located in the upper right hand corner on the landing page.
Select the  icon to log in to PDS.

Here is an example of the landing page:



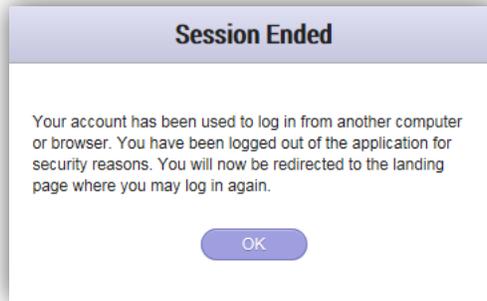
Login

Once you select the Login icon you will be redirected to the Login page. From here you can enter your user ID and password to gain access to PDS. You can also change your password which expires every 90 days. There is no cost to log in to PDS.

The screenshot shows the 'Login' page with a header and three input fields: 'User ID', 'Password', and a 'Forgot Password?' link. Below the input fields are three buttons: 'Cancel', 'Change Password', and 'Login'.

You will use the same user ID and password that you currently use for our other Online Services (Titles Online, Documents Online and Survey Plans Online).

A note about sharing user IDs: If the same user ID is used to log into multiple sessions in PDS the first user's session will be terminated and the following notification will appear:



Remember that there is no cost for individual user IDs with PDS so sharing user IDs is not recommended.

Password reset

If you get locked out of your account or forget your password you can reset your password by selecting the *Forgot Password?* option from the login page:

A login form with two input fields. The first is labeled "User ID" and the second is labeled "Password". To the right of the "Password" field is a blue link that says "Forgot Password?".

From here you will enter your email address in the box provided and our system will email you a link to reset your password.

A form titled "Online Services Forgot Password". It contains two lines of instructional text: "Please enter the email address associated with your account." and "We will send you an email containing a link and instructions for changing your password." Below the text is an input field labeled "Email Address". At the bottom are two buttons: "Cancel" and "Submit".

You should receive an email with a link to reset your password within five minutes. You won't receive the email if:

- The email address you provided contained a typo.
- The email address you provided does not match the email associated to your profile. For security reasons, we can only send a reset link to the email address you used when you registered your profile.
- The email address you entered is shared with another user. For security reasons, we can only send a reset link to an email address that is unique to your profile.
- The email with the link to reset your password was sent to your junk folder.

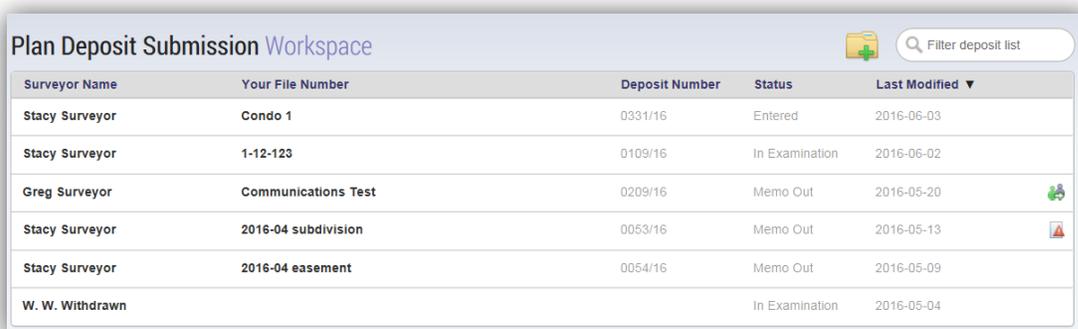
Workspace

Once you have logged on you will arrive at your workspace. The workspace will help you organize your deposits.

Main features

From the workspace you can complete multiple tasks such as:

- Navigate to our other online applications
- Create new deposits
- View previously submitted deposits
- Filter your deposit list to find a certain deposit
- View memorandum status details  (see [memo out](#) for more information)
- View expiration date details  (see [important restrictions](#) for more information)
- View deposit sharing information  (see [manage your deposit after submission](#) for more information)



The screenshot shows the 'Plan Deposit Submission Workspace' interface. At the top right, there is a search bar labeled 'Filter deposit list' with a magnifying glass icon. Below the search bar is a table with the following columns: 'Surveyor Name', 'Your File Number', 'Deposit Number', 'Status', and 'Last Modified'. The table contains six rows of data, each representing a deposit record. The first row is for 'Stacy Surveyor' with file number 'Condo 1', deposit number '0331/16', status 'Entered', and last modified '2016-06-03'. The second row is for 'Stacy Surveyor' with file number '1-12-123', deposit number '0109/16', status 'In Examination', and last modified '2016-06-02'. The third row is for 'Greg Surveyor' with file number 'Communications Test', deposit number '0209/16', status 'Memo Out', last modified '2016-05-20', and a share icon. The fourth row is for 'Stacy Surveyor' with file number '2016-04 subdivision', deposit number '0053/16', status 'Memo Out', last modified '2016-05-13', and a warning icon. The fifth row is for 'Stacy Surveyor' with file number '2016-04 easement', deposit number '0054/16', status 'Memo Out', last modified '2016-05-09', and a warning icon. The sixth row is for 'W. W. Withdrawn' with status 'In Examination' and last modified '2016-05-04'.

Surveyor Name	Your File Number	Deposit Number	Status	Last Modified
Stacy Surveyor	Condo 1	0331/16	Entered	2016-06-03
Stacy Surveyor	1-12-123	0109/16	In Examination	2016-06-02
Greg Surveyor	Communications Test	0209/16	Memo Out	2016-05-20
Stacy Surveyor	2016-04 subdivision	0053/16	Memo Out	2016-05-13
Stacy Surveyor	2016-04 easement	0054/16	Memo Out	2016-05-09
W. W. Withdrawn			In Examination	2016-05-04

Content

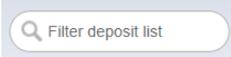
The workspace may contain deposits from the following sources:

1. Deposits that you have submitted.
2. Deposits that your designated staff have submitted on your behalf.
3. Deposits that any other staff member in your firm has shared with you.
4. Deposits where any other staff member in your firm has changed the ownership to you.

Deposit search

The order of the deposit list in the workspace will default to a chronological display with the most recently modified deposit appearing at the top.

To search for a deposit:

- Navigate to the  field and enter any part of the surveyor's name, file number, deposit number, current status or the last modified date of the deposit you are looking for.
- As you enter your search criteria the folder list will automatically filter to show any deposits that match or partially match your search criteria.
- You can select the deposit you are looking for once it becomes visible in the deposit list.

Deposit status

There are several statuses that can be associated to a deposit in PDS. Statuses are covered in more detail in [the memorandum \(memo\) process](#) section of this guide.

Status	Meaning
Entered	We've placed the deposit in the queue for examination.
In examination	The deposit is in the examination process.
Memo out	Means the memo has been sent to the surveyor and: <ul style="list-style-type: none">• review and correction is required (sub status will be "<i>correction required</i>" )or• The memo has been approved for copies. See memo out for more details.
Memo in	Surveyor has replied to our memo out.

Important restrictions

Please keep the following restrictions in mind when managing your deposits:

- There is no maximum to the number of deposits you can have in your workspace at one time.
- If you create a deposit but do not add at least one document to the deposit PDS will not save your work if you navigate away from the page.

- If you create a deposit but do not submit it within the same working day the deposit will be deleted from your workspace overnight.
- Each deposit will remain in the workspace for a maximum of five years starting from the date the deposit was last modified.
 - “Modified” means the date that the deposit was created if there are no comments or the date of the last comment in the memo.
- When a deposit is close to its expiration date, a warning icon () will appear on the deposit.
 - Hover over this warning for more details on the date of expiration.
 - This expiration warning will start to appear one year before the deposit expiration date.

 Deposit must be submitted today or it will be deleted from your workspace at 23:59.

Create and submit a deposit

This section will describe how to create a new deposit and submit it for registration.

Create a new deposit

Follow these steps to create a new deposit:

1. Click on the  icon.
 - A new deposit will open.
2. Enter your file number.
 - This field is searchable in the workspace so you may want to include details in the file number that will help you find the deposit at a later date.
3. Select the deposit surveyor using the following guidelines:
 - If you are registered as a surveyor in our system then the list will default to your name and will not allow changes.
 - No one else will have access to your deposit.
 - If you are not registered as a surveyor in our system then you will be able to select a surveyor name from a list of active surveyors in your firm.
 - PDS will automatically share your deposit with the surveyor you select and they will have full permissions to add documents or comments (see [share deposit](#) for more information).
4. Select the appropriate Land Titles registering office from the drop down list (Brandon, Dauphin, Morden, Neepawa, Portage La Prairie or Winnipeg).

5. Enter a planning file number (optional).

The screenshot shows the 'Create Deposit' form in a workspace. It includes a 'Your File Number' input field with a callout '2', an 'Add Image and Documents' upload box with a callout '3', a 'Surveyor Name' dropdown menu with a callout '4', a 'Registering Office' dropdown menu with a callout '4', a 'Status' field set to 'Not Assigned', and a 'Planning File No.' input field with a callout '5'.

Upload documents

You can now add all documents relevant to the deposit to the upload queue. There is no limit to the total number of documents you can upload per deposit.

6. There are two ways to add a document to the upload queue:
 - a. Selecting the [Add to Upload List](#), or
 - b. Drag and drop documents into upload box.

Note: This action does not upload the documents to the deposit; it only adds them to the upload queue. You must upload at least one document to the deposit for PDS to save your work. If you leave this page before uploading your documents your changes will be lost.

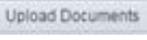
Size restrictions: There is a 500 MB size limit for each uploaded document.

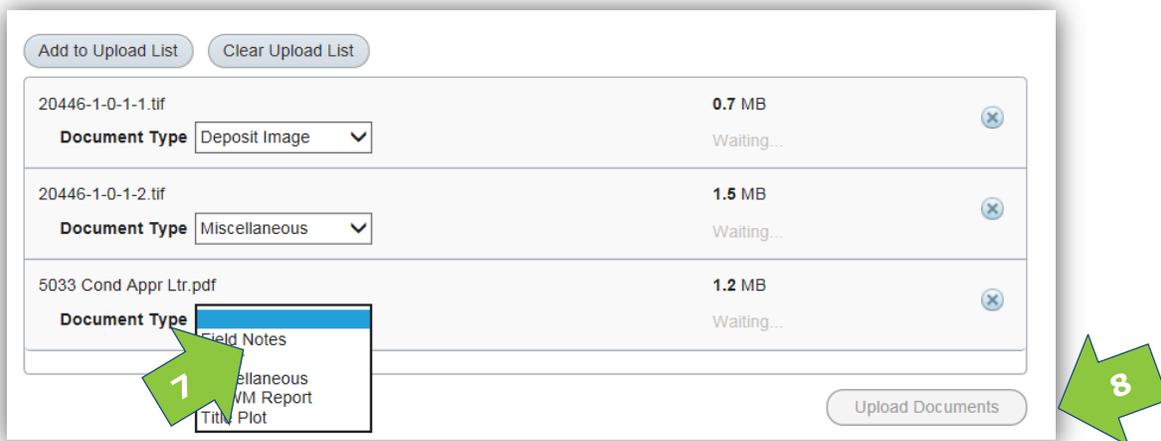
The screenshot shows the document upload queue interface. It features two buttons at the top: 'Add to Upload List' and 'Clear Upload List'. Below these is a large empty box with the text 'Drop documents here to be queued for upload'. At the bottom right, there is an 'Upload Documents' button. Green callouts with the number '6' point to the 'Add to Upload List' button, the drop area, and the 'Upload Documents' button.

7. Select each document's type from the drop down list associated to each document:

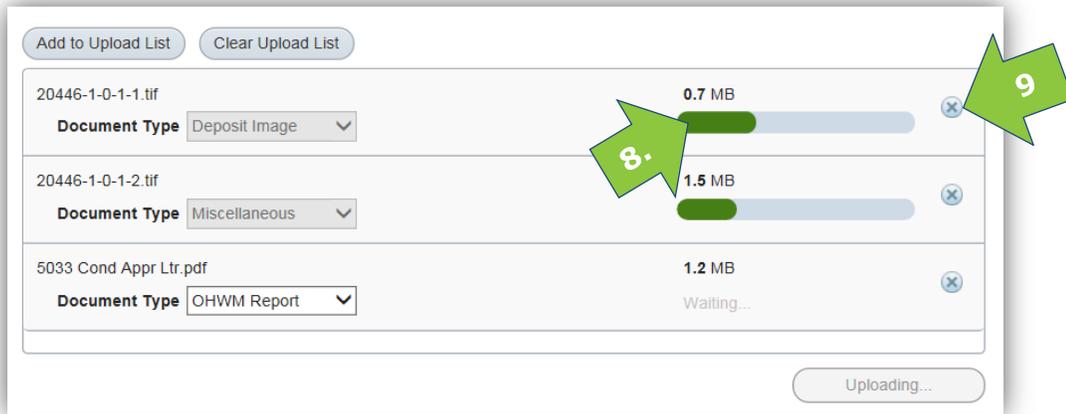
Document type	Required document	Limit per submission	Required file type
condominium sheet	optional	Unlimited (must be submitted with at least one deposit image)	TIF/TIFF
deposit image	mandatory	max one per submission*	TIF/TIFF
field notes	optional	unlimited	PDF
letter	optional	unlimited	PDF
miscellaneous	optional	unlimited	PDF/JPEG/TIFF/DWG
monument restoration (sketch)	mandatory	max one per submission	TIF/TIFF
monument restoration (report)	optional	unlimited	PDF
Ordinary High Water Mark (OHWM) report	optional	max one per submission	PDF
title plot	optional	max one per submission	PDF

* PDS is designed to accept one plan deposit image per deposit submission. For example, if you are submitting a plan of subdivision and a related plan of easement you will need to submit them as two separate deposits with the same file number.

8. Click on the  icon to begin uploading.



9. You can cancel an individual document upload by selecting the  icon next to the document you wish to delete.



Upload status	Indicator
Not uploaded	
Uploading	

10. You can also abort and delete the entire deposit before submitting by selecting the  icon directly underneath the file number field.



Submission and payment

Use this process when you are ready to submit your deposit for examination.

1. Select which online deposit account you want to use for this submission from the drop down list.
 - You can save your selection for future transactions if you have multiple accounts.
 Use this account for payment on future submissions
 - The fee amount will be displayed to the right of the deposit account drop down list.
 - No fee will be charged if you indicate that this deposit submission is a Monument Restoration sketch or a Plan Perpetuating Monuments.
2. Agree to the *Terms and Conditions*.
3. Submit deposit for examination.

Plan Deposit Submission Create Deposit [Workspace](#)

Your File Number
16-4-7

⚠ Deposit must be submitted today or it will be deleted from your Workspace at 23:59.

Filter document list

- Test Tiff Sample.tif
2016-11-15
Deposit Image
- TIFF Sample 2.tif
2016-11-15
Title Plot

Submission and Payment

The deposit owner is required to make the payment for the plan deposit submission.
Prepared under the authority of Stacy Surveyor, MLS.

Charge to Account

Deposit Account: 42 (\$902,127.00) A \$ examination fee will be charged.

Use this account for payment on future submissions

This is a Monument Restoration sketch or a plan Perpetuating Monuments.

I have read and agree to the terms and non-distribution clauses in the [Terms and Conditions](#).

Submit

Office of the Registrar-General | The Property Registry | Contact Us | Privacy Statement | Terms and Conditions of Use

You will be able to view, print or save a confirmation notice which includes the new deposit number upon submission:

Confirmation 3105 Print

 **The deposit has been submitted to The Property Registry on 2016-11-15 at 14:18.**
Deposit number **0616/16** has been assigned to this submission.
A plan examination fee of \$ (CAD) was withdrawn from your deposit account.
Please print or save a copy of this confirmation for your records.



A confirmation email will also be sent to your account administrator for each deposit.

Plan Deposit Submission Confirmation

The Property Registry
276 Portage Avenue
Winnipeg, Manitoba R3C 0B6
Telephone: (204) 945-2042
Toll-free: 1 (888) 877-3067
Email: tprcient@tprmb.ca

Plan Examination Fee: \$130.00 **Submitted By:** Stacy Assistant
Deposit Account: 40 PDS UAT Firm 5
Receipt Number: 840027260254 649 St. Mary Avenue
Winnipeg, Manitoba R3R 1B8
Canada

Surveyor Name: Stacy Surveyor
Deposit Number: 0337/16
Your File Number: 16-2-1
Submitted Date: 2016-06-03 11:32:33

Documents Submitted

Type	Document Name
Miscellaneous	20446-1-0-1-2.tif
Deposit Image	20446-1-0-1-1.tif
OHWM Report	5033 Cond Appr Ltr.pdf

The memorandum (memo) process

Once a deposit has been submitted it will be assigned a deposit number and will be placed in the queue for examination. This section will provide an overview of the various steps a deposit may follow as it is examined.

Status: entered

Entered status means that the deposit has been submitted for examination and has been placed in the examination queue. At this point our survey examiners have not viewed the deposit yet but a deposit number has been assigned.

The screenshot displays the 'Plan Deposit Submission Deposit Details' interface. The main area is titled 'Memorandum' and contains the following information:

Examination of	Unknown	Status	Entered
Appraiser Name	Stacy Surveyor	Planning File No.	2016-01-02
Portage	Portage	Examiner	

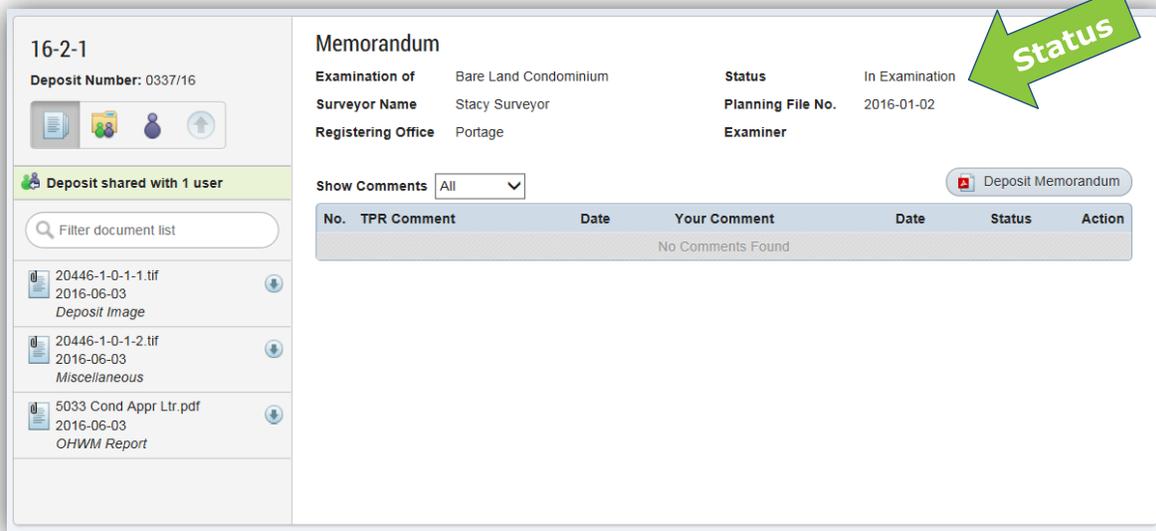
The sidebar on the left shows a list of documents:

- 20446-1-0-1-1.tif (2016-06-03) - Deposit Image
- 20446-1-0-1-2.tif (2016-06-03) - Miscellaneous
- 5033 Cond Appr Ltr.pdf (2016-06-03) - OHWM Report

Two green arrows are overlaid on the image: one labeled 'NEW Deposit' pointing to the 'Deposit Number: 0337/16' field, and another labeled 'Status' pointing to the 'Status: Entered' field.

Status: in examination

In examination status means that the deposit has been taken from the queue for the initial examination process. The deposit is opened as soon as possible to confirm the DGS and other data for indexing purposes. As a result there may be a small lag from the time the deposit switches to in examination and the time that a survey examiner begins the examination process.



16-2-1
Deposit Number: 0337/16

Examination of Bare Land Condominium Status In Examination
Surveyor Name Stacy Surveyor Planning File No. 2016-01-02
Registering Office Portage Examiner

Deposit shared with 1 user

Show Comments All

No.	TPR Comment	Date	Your Comment	Date	Status	Action
No Comments Found						

Deposit Memorandum

Filter document list

- 20446-1-0-1-1.tif
2016-06-03
Deposit Image
- 20446-1-0-1-2.tif
2016-06-03
Miscellaneous
- 5033 Cond Appr Ltr.pdf
2016-06-03
OHWM Report

Status: memo out

Memo out status indicates that a survey examiner has examined the deposit and is either requesting more information or is approving the deposit for copies. A request for correction may include requesting more information, a correction, a clarification or additional documentation. This is also where we'll indicate if a re-examination fee will be required. At this point the examiner assigned to the file will be added to the memo.

The screenshot shows a 'Memorandum' page for deposit 16-2-1. The status is 'Memo Out Clarification Required'. The examiner is Stacy Gosman. A comment from 2016-06-03 says 'please check closure'. A 'Re-examination' message at the bottom states: 'A new Deposit Image is required. A \$130.00 re-examination fee will be charged.' Callouts point to the status line, the examiner's name, a comment, and the re-examination message.

No.	TPR Comment	Date	Your Comment	Date	Status
1	please check closure	2016-06-03			Open

Where to find status details

The status will update in real time as the examiner finishes the examination process. There are two places you will be able to view the details of the status of your memo:

1. Workspace – each deposit will have a status listed in the Workspace. For all deposits listed as "memo out" and require a correction, an additional icon will provide this information. Hover over the icon to view this message.

The screenshot shows a table with columns: Surveyor Name, Your File Number, Deposit Number, Status, and Last Modified. The 'Status' column for the first row is circled in red. An icon in the 'Last Modified' column of the first row is also circled in red.

Surveyor Name	Your File Number	Deposit Number	Status	Last Modified
Stacy Surveyor	16-2-1	0337/16	Memo Out	2016-06-03
Stacy Surveyor	Condo 1	0331/16	Entered	2016-06-03
Stacy Surveyor	1-12-123	0109/16	In Examination	2016-06-02

2. Deposit details – within the details of the deposit the status and sub-status will also be available.

Memorandum

Add the deposit image and any supporting documents from your computer to the upload list below.

Examination of	Bare Land Condominium	Status	Memo Out Clarification Required
Surveyor Name	Stacy Surveyor	Planning File No.	2016-01-02
Registering Office	Portage	Examiner	Stacy Gosman

Sub-status definitions

<u>Sub-status</u>	<u>Action required</u>
<ul style="list-style-type: none"> • OK for copies • Correction required • Tentatively accepted and OK for copies • Tentatively accepted and OK for copies subject to corrections • OK for copies subject to correction 	<ul style="list-style-type: none"> Ready to register View memo details for the required correction

Comments in general

The comment section has been designed to replace the memorandum that our employees and surveyors currently use to communicate with each other about a deposit.

No.	TPR Comment	Date	Your Comment	Date	Status	Action
1	please check your closure	2016-05-25	corrected	2016-05-25	In Review	
2	closure is still off. refer to plan...	2016-05-25			Open	

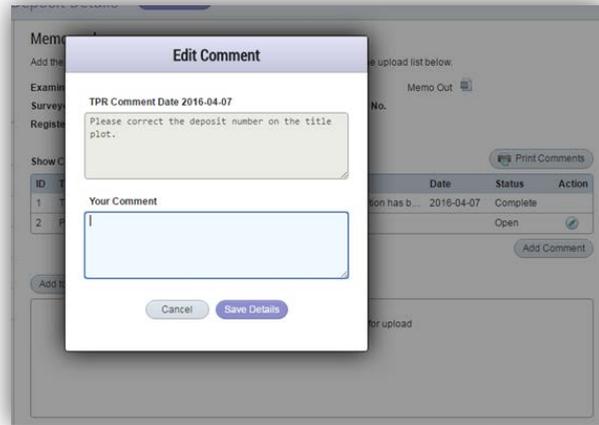
[Add Comment](#)

Heading	What it means
No.	Each comment is assigned an identification number
TPR Comment	The comment that has been provided by a survey examiner
Date	The date the comment was posted
Your comment	The comment that you have provided
Date	The date your comment was posted
Status	The status of the comment
	<p>Open – Assigned to a comment that has been and is awaiting surveyor response</p> <p>In review – Assigned to a comment that has been provided by the surveyor and is awaiting our response</p> <p>Complete – Assigned to a comment that we've reviewed and approved</p>
Action	Use the Action icon to edit your comment (Deposit status must be memo out and comment status must be in open for surveyor to edit)

Add/view comments

To view a comment in its entirety or reply to a comment you can expand any comment by selecting it. Once you select a comment a box will open to show the expanded details and allow editing. Once you are finished adding your comment,

select **Save Details** to save your changes. Your memo comments will remain in your memo while you work on it. It is important to note that if we leave a comment you **must reply** before you can re-submit your deposit. There is no longer a need to physically sign the memo.



Note: While your deposit is in the memo out stage you are also able to initiate a new comment by selecting the **Add Comment** located directly below the full comment list.

Filter and print comments

The comments will be sorted by the comment entry date from the oldest comment to newest. If you would like to narrow down the list you can do so by filtering the comment list by status. The drop down list allows you to select from all, open, in review, and complete. The default selection is all.

To view or print a PDF copy of the comments simply select the **Deposit Memorandum** icon. This option will print all available comments unless you have filtered the list before selecting this option. For example, if you only want to print the open comments you would first filter the list to show comments with an open status and then print the comments.

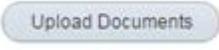
No.	TPR Comment	Date	Your Comment	Date	Status	Action
1	A TPR Comment.	2016-05-16	A reply. Now it will be in Memo In.	2016-05-16	In Review	
2	A new TPR Comment, sendin...	2016-05-18			Open	

Upload additional documents

If you need to upload new documents as part of responding to our comment you can do so here. The process is similar to the initial upload of documents prior to submission. An overview of the steps to add additional documents is listed below. For more detailed information on uploading documents in general, please see the [upload documents](#) section.

Steps to upload additional documents:

1. Add new documents to upload list.
2. Select the document type from the drop down list.
 - Although there is a limit of one deposit image and one OHWM Report per deposit, you are able to upload one additional document of each of these types upon resubmission. This allows you to upload a replacement document if required. Adding a secondary document does not delete the previous version from the deposit. All documents remain in the deposit.

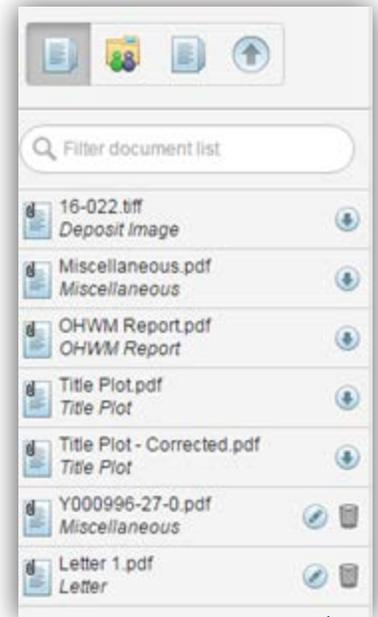
3. Select the  icon to start upload process.

Once the documents finish uploading they will be adding to the deposit's full document list located on the left hand side of the workspace.

Note: In the example on the right you will notice that only the last two documents were added after the initial submission of the deposit.

- These are the only two documents that the surveyor can edit or delete.
- New documents can only be modified while the deposit is in the memo out status.

4. Select the  icon to re-submit the deposit.
 - If no re-examination fee is required, you will only have to accept the terms and conditions in order to resubmit the deposit.
 - If a re-examination fee is required, you will need to provide payment details in addition to accepting the terms and conditions in order to continue.
5. The deposit status will now change to memo in.



Status: memo in

Memo in status indicates that the surveyor has responded to our questions or requests and is waiting for the Survey examiners to either approval the changes/updates made to the deposit and or respond further. While the deposit is in the memo in status, **no edits** can be made by the surveyor.

Manage your deposit after submission

There are several icons that will help you manage your deposits:



Will allow you to view and search a list of the deposit's contents.



Will allow you to share a deposit.



Will allow you to change ownership of a deposit.



Will allow you to re-submit your deposit for examination.
See [Upload Additional Documents](#) for more information.

Share deposit

You can share your deposit with any user with approved access to PDS. Sharing a deposit is a useful feature when more than one person will need to have access to the contents of a deposit.

The screenshot shows the 'Plan Deposit Submission Deposit Details' interface. The 'Share Deposit' section is highlighted with a yellow box and contains the text 'Deposit has not been shared yet'. Below this, there is a 'Share with users' section with a table listing users and their permissions. The table has columns for 'User ID', 'User Name and Firm', 'Add Documents', and 'Add Comments'. One user, 'PDS5ASTSG' (Stacy Assistant - PDS UAT Firm 5), is listed with checkboxes for 'Add Documents' and 'Add Comments'. There is also a 'Share with comments' section with a text area and a 'Share deposit from' section with a 'Starting Date' dropdown set to '2016-06-03' and radio buttons for 'for [] days' and 'Indefinitely'. A checkbox at the bottom indicates 'I have reviewed all entered users. They are the persons I intend to share the deposit with.' and a 'Share Deposit' button is at the bottom right.

User ID	User Name and Firm	Add Documents	Add Comments
PDS5ASTSG	Stacy Assistant - PDS UAT Firm 5	<input type="checkbox"/>	<input type="checkbox"/>

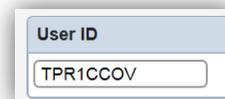
Please note: If you are registered in PDS as any user other than a surveyor, your deposit will automatically be shared with the surveyor you selected from the drop down list when creating the deposit.

To manually share a deposit:

1. Navigate to the deposit you would like to share from your workspace.

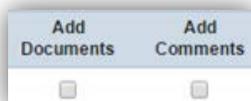
2. Select the Share Deposit  icon.

3. Enter the user name of the user you would like to share this deposit with.



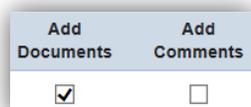
User ID
TPR1CCOV

4. You can limit the access of the user you are sharing the deposit with:



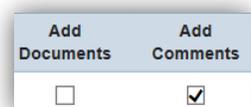
Add Documents	Add Comments
<input type="checkbox"/>	<input type="checkbox"/>

Indicates that the additional user has a view only level of access.



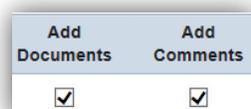
Add Documents	Add Comments
<input checked="" type="checkbox"/>	<input type="checkbox"/>

Indicates that the additional user has the ability to add new documents to the deposit only.



Add Documents	Add Comments
<input type="checkbox"/>	<input checked="" type="checkbox"/>

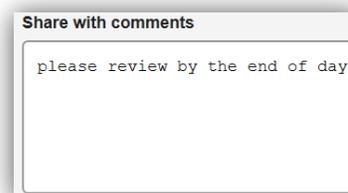
Indicates that the additional user has the ability to add new comments to the deposit only.



Add Documents	Add Comments
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Indicates that the additional user has the ability to add new documents to the deposit as well as add comments.

5. You have the option to include comments with the deposit you are sharing. These comments are for internal use only. We don't see these comments.

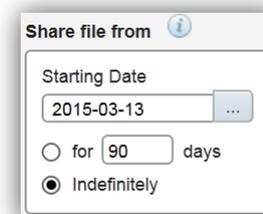


Share with comments

please review by the end of day

6. You also have the option to delay the sharing date or define how long you would like to share deposit. This option applies to all of the people you are sharing the deposit with.

start
the

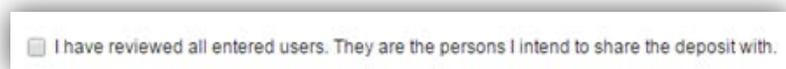


Share file from 

Starting Date
2015-03-13 ...

for 90 days
 Indefinitely

7. You will have to confirm that the information that you entered is correct before you will be able to share the deposit.



I have reviewed all entered users. They are the persons I intend to share the deposit with.

8. Once the deposit has been shared successfully the following notifications will be visible:



Will be placed on the deposit details page.



Will be placed on the deposit being shared in the workspace.

The  icon will also be visible in the workspace of the person you have shared your deposit with, to notify them that a deposit has been shared with them.

You are able to manage the users you are sharing with:

- You can delete any user by selecting the trash bin located beside the user information before sharing the deposit. This will stop sharing the deposit with that user and you have the option to re-share with them at a later date.
- You can stop sharing the deposit at any time by using the same trash can icon to remove one or all users and selecting the Share Deposit icon again to update this information.

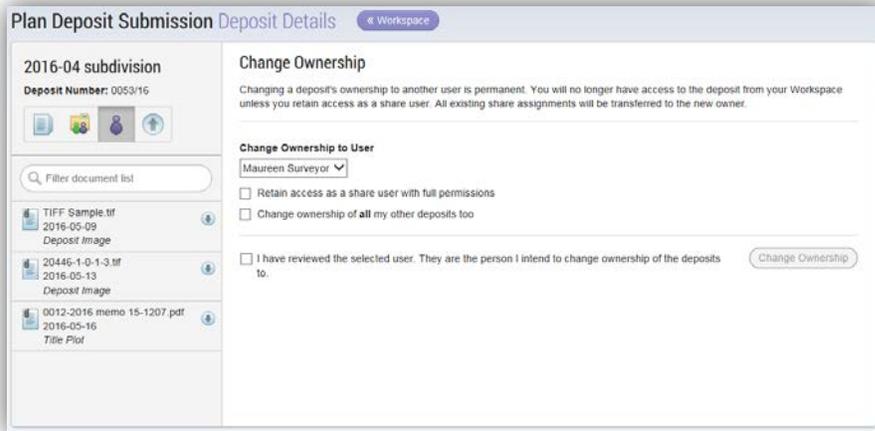
Security with sharing

We have provided all the tools you need to actively manage your deposits within your office environment. Here are a few tips on how you may want to use the features to ensure the appropriate staff member is completing specific duties in PDS:

1. All deposits created by anyone other than a MLS will automatically be shared with the surveyor assigned to the deposit (at the time the deposit was created) with full permissions for all parties.
2. If the MLS creates the deposit it will not be shared with anyone automatically. The surveyor would have to specifically set up the sharing feature and PDS allows you to define permissions at that time.

Change ownership

This option is similar to sharing a deposit. The key difference is that you would use the change ownership option if you want to reassign a deposit permanently and you no longer want to be the person in charge of the deposit. The owner you change a deposit to will take it over as if they were the one who originally created the deposit. This does not change the name of the surveyor assigned to the deposit. If you want to change the surveyor on the deposit, you will need to contact us.



To change the owner of a deposit permanently:

1. Navigate to the deposit you would like to change from your workspace.
2. Select the Change Ownership  icon.
3. Select the name of the user you would like to reassign this deposit to from the drop down list.
 - You are only able to change the ownership of your deposit to one user.
 - You are only able to select from approved PDS users within your own firm.
4. While changing ownership of the deposit you can decide what level of access you want to retain:
 - Selecting the option below indicates that you want to retain full access to the deposit once reassigned as a secondary user.

Retain access as a share user with full permissions

- If you do not select this option you will no longer have any access to the deposit once reassigned.
5. You will have to confirm that the information that you entered is correct before you will be able to reassign the deposit.

6. Once the deposit has been reassigned successfully the following notifications will be displayed:



Note: Once the ownership of a deposit has changed you will not be able to cancel the change even if you retain access. To reverse the change of ownership you must have the owner you changed your deposit to change the ownership back to you.

Delete your deposit

You can't delete a deposit once it has been submitted for examination. If you would like to withdraw your deposit you must contact the Examiner of Surveys or Deputy Examiner of Surveys.

