Joint Initiative Between

The Association of Canada Lands Surveyors and the Surveyor General Branch
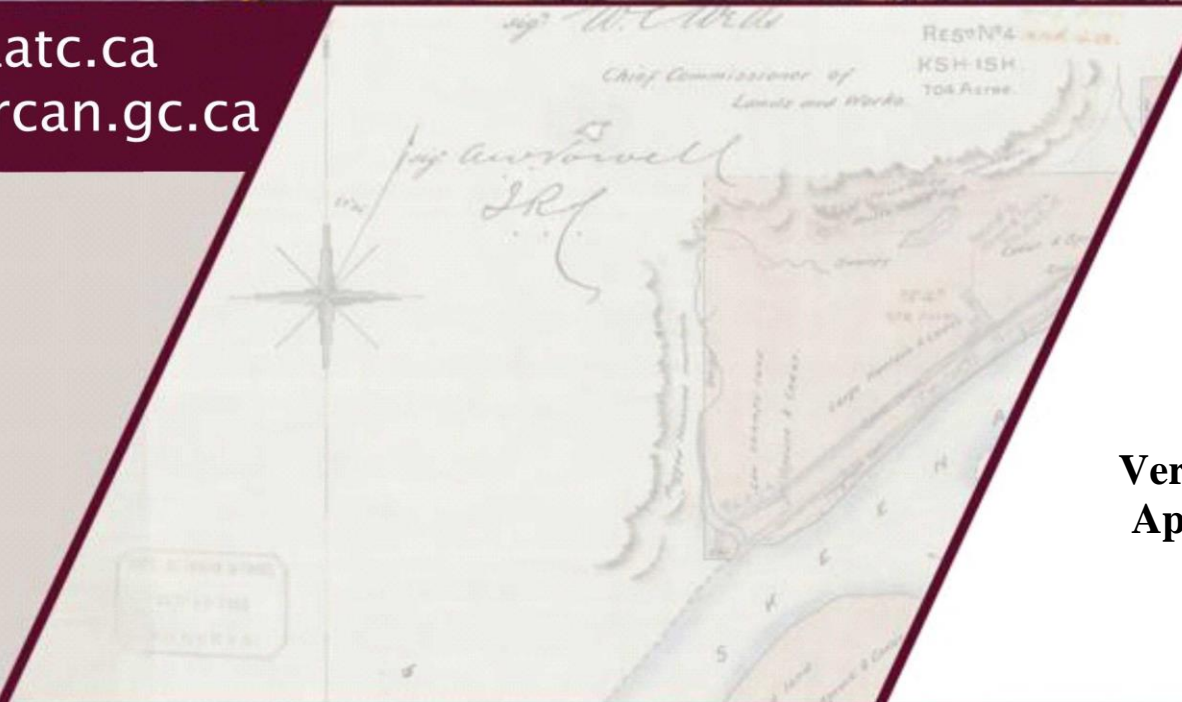
MyCLSS Web Application

User Guide

acls–aatc.ca
sgb.nrcan.gc.ca

Version 2.0
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<table>
<tr><td colspan="3" align="center">**This HELP Document is for MyCLSS Version 2.0**</td></tr>
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List of Acronyms

ACLS   Association of Canada Lands Surveyors

CLS   Canada Lands Surveyor(s)

CLU   Client Liaison Unit (of the Surveyor General Branch)

MyCLSS   My Canada Lands Survey System

SGB   Surveyor General Branch

SI   Survey Instructions

1   OVERVIEW

1.1   General

This User Guide is to serve as an on-line HELP tool that facilitates the use of the *MyCLSS* web system for the processing of survey plans by members of the Association of Canada Lands Surveyors (ACLS). *MyCLSS* is an acronym for "*My Canada Lands Survey System*" and is a collaborative web resource developed between the Association of Canada Lands Surveyors and the Government of Canada represented by the Surveyor General Branch (SGB), Natural Resources Canada (NRCan).   The web site allows surveyors to access relevant on-line information, search existing survey plan and project databases, request survey instructions, complete a customized checklist for most Survey Documents and track the progress of Survey Documents from initiation to acceptance in the Canada Lands Survey Records (CLSR) system. This Version 2 of the User Guide also incorporates changes that have occurred since the development of the first version of MyCLSS that was put to production. The new MyCLSS web site now allows Land Administrators to log in and conduct their approval process. These changes involve new interface looks in some cases, though the processes remain essentially the same.

The site is put in place for the use of Canada Lands Surveyors (CLS), Land Administrators, and other associated entities authorized by them. The general public has access to many of the tools that are referenced on this web site. After they log in a CLS has full access to special services such as requesting survey instructions from the Surveyor General Branch, use of the checklist tools provided by the ACLS and the ability to maintain their profile information for use by both the ACLS and the SGB. Users authorized by a CLS can also access certain information such as Survey Instructions and checklists in a view or print mode for that particular CLS. Likewise, Land Administrators have access for managing the approval process of their areas of jurisdiction. The ACLS is responsible for authorizing and managing login information for Canada Land Surveyors, while the SGB is responsible for managing user profiles for Land Administrators.

This document describes the various menus and processes for users who log on to the application. The user access page is shown in Figure 1 and it contains a menu bar for useful survey-related information, links to the Help and Login pages, and links to Contacts for the management of MyCLSS. An overview of the plan review process that describes the various components, processes and responsibilities of MyCLSS.ca is given in Section 1.2. The usage of the system is described from Section 2 down. The menu bar shown on the main interface contains tools that link to online resources and documentation that may be helpful in conducting surveys and producing survey products. These menus are described at the end of this document.

This version (2.0) of the User Guide is an update of the original version (1.1) and incorporates changes that have occurred since the initial release of MyCLSS. Some of these changes have been due to bug fixes, while others have been due to implementation of either user requirements that could not be completed at the time of the initial release, or modifications that occurred as a result of change management requests. However, the greatest achievement of this version is the

shift from the processing and recording of the traditional mylar survey plans to recording of digital plans that are digitally signed, in what is referred to as e-Recording. The e-Recording process implements the archiving of the digital plans in the new e-Registry, which is also a shift from the traditional physical CLSR archive.
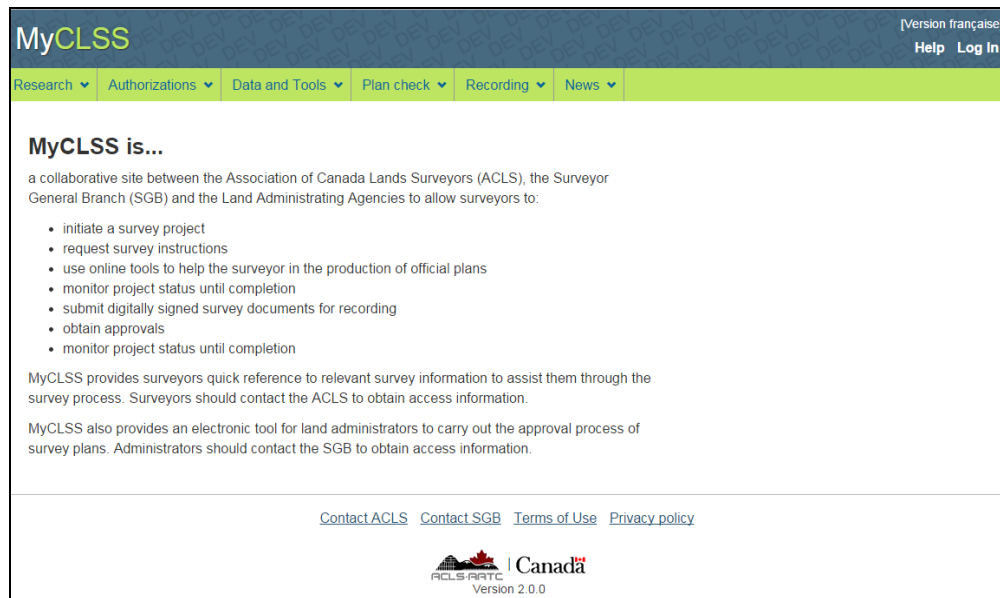

Figure 1: User access page

1.1.1 Supported Browsers

The system has been tested in the browsers listed below. Contact the ACLS or SGB if you have any issues with browser or platform compatibility.

- It works for a wide variety of browsers that support HTML 5 (which include all modern browsers), in terms of interoperability;
- It conforms to WCAG 2.0 level AA, in terms of accessibility; and
  It is mobile friendly in design, meaning:
    o it adapts to differing screen sizes and device capabilities,
    o it has touchscreen support,
    o it is optimized for performance, and
    o it has support for building device-based mobile applications.

1.2 Overview of the Plan Review Process

The detailed processes and responsibilities in the "MyCLSS.ca" and its components are described in the following sub-sections.

1.2.1 Log-In, Validation and User Profile

The Log-In interface is resident in MyCLSS.ca collaborative site. There are two log in tools on this site. The project's surveyor logs in through this interface and his/her login profile is validated by an ACLS process that confirms user's privilege to use the system. In principle, this process enables web communications between MyCLSS.ca and an ACLS server that contains membership data. The Land Administrator's representative logs in to process approval requests.

The SGB is responsible for maintaining the Log-In interface and validation of Land Administrator users, while the ACLS is responsible for the validation of project surveyors. Both types of users can update their profile information by using the **My Profile** tool after a login (this is described later).

1.2.2 eInstructions

The eInstructions user interface also resides on MyCLSS.ca and it interacts with the eInstructions application at the SGB side. The tool enables the surveyor to request survey instructions after the surveyor has selected the region of survey, the location, and type of survey, which are fields provided in MyCLSS.ca and uploaded relevant authorization documents. Survey instructions are then generated and stored in MyCLSS.ca, with a relevant notice by email to the surveyor.

The SGB is responsible for maintaining the eInstructions interface and application, with the relevant web communications. Any information supplied by the CLS in the course of requesting Survey Instructions or amendments thereto is provided to the SGB.

1.2.3 Survey Document

Once survey instructions have been generated, the surveyor can request the creation of a Survey Document under the project. The type of Survey Document determines what checklist (if one is applicable) the system presents to the surveyor. Policies that affect the generation of a checklist have been put in place by the SGB and ACLS. The ACLS is responsible for maintaining the Checklist interface and application, and also the update of the checklist content.

The surveyor performs the survey work and creates the Survey Document he/she wants – Plan of Survey of, Field Notes of Survey of, etc. The system will display a list of possible Survey Document types to choose from. A Survey Document milestone is generated and stored under the project in MyCLSS.ca.

1.2.4 Professional Review portion of Checklist

The Professional Review portion is basically the whole checklist without the approvals portion. This process is to help the surveyor apply greater and more consistent scrutiny to the preparation of the product, based on the relevant portions of the regulations, practice manual, and policies, and to make corrections to the product as may be necessary before finalizing the Survey Document and submitting it to the SGB for review. The answers to checklist items are either "YES", or "N/A" (not applicable) with an option of a comment. It is not provided for to have a "NO" answer.

Completion of the Professional Review automatically triggers the system to generate a checklist number. In the e-Recording era, the surveyor does not upload a PDF file in order to get a checklist number. Instead, submitting the completed checklist leads the surveyor to the ACLS Levy Form page which will have the checklist number displayed, as the next step. However, this does not compel the surveyor to complete the Levy Form right away: he/she can complete this step at another time. The project information is also updated to show the checklist number.

The system will send the checklist number to the SGB but the SGB has no access to the actual responses by a CLS on a checklist. Only the ACLS, the project's surveyor and staff that the surveyor has authorized can view the checklist. The ACLS' interest in the responses to the checklist is for Practice Review purposes.

1.2.5   ACLS Plan and Monument Levy Report Form

The surveyor completes the monument and levy form that is contained within the Checklist interface in MyCLSS.ca. This information is used by the ACLS for invoicing and accounting purposes in accordance with ACLS Bylaws.

1.2.6   Digital Signature on Plan

The surveyor adds his/her digital signature on the digital plan. The process for doing this is described in another document which surveyors will be made aware of. Surveyors are registered with the NRCan's Public Key Infrastructure system that validates their digital signatures. In order to have an archival quality PDF document that maintains the history of the possibly multiple signatures, the version of PDF used for signing is PDF/A-2B.

1.2.7   Final Submission

The CLS' digitally signed plan, the digitally signed survey report, and all other relevant documents are submitted to SGB through an upload page in MyCLSS. If the plan is not digitally signed by the surveyor, the unsigned PDF must be submitted through the upload page and its physically-signed Mylar sent to the SGB by mail.

1.2.8   SGB Plan Reviews

The SGB will review the plan based on a list of critical items and decide if the plan is approved or critical issues are found. In addition, the applicable Land Administrator will review the plan and send approval notification to the SGB, possibly through the newly developed e-Approval side of MyCLSS for those Agencies that sign on to that service. If the plan passes the reviews, it will be digitally signed by the Surveyor General Designate, the CLSR number will be digitally added, and recorded in the CLSR e-Registry. The CLSR number will be displayed in the Survey Document page of the project, giving the CLS access to the accepted Survey Document. The review of Mylar plans will be accommodated until necessary regulations are in place for a total shift to the digital route.

In the case where the plan does not pass the SGB reviews, indicating critical issues have been found, there are two possibilities:

- The surveyor can appeal the SGB decision, and if successful, the notice of critical issues will be withdrawn.
  If corrections to the plan are required the surveyor will amend the Survey Document and complete another checklist.

2   Log in

While the Website allows the general public to view the information provided by the menu bar, approved users must log in to have the benefit of the functionality of the MyCLSS application. In this manual, Login is described for the CLS user, while Login for the Land Administrator user is described in the *e-Approval User Guide*. To log in, click on the **Log in** hyperlink at the top right corner of the main page. Type your username and password in the corresponding input fields in the **Surveyor's Log in** frame and click on the **SIGN IN** button (Figure 2). The initial username and password are assigned by the ACLS. Users can change their passwords after the first login.   To change password or other membership information use the **My Profile** tool described Section 2.1.

CLS Login information is maintained by the ACLS.

NOTE:
1. *Contact ACLS if you need to obtain username and password, or if you are having any problem signing in with your known login information (see the bottom of Figure 1 for contact link to ACLS).*
2. *CLS needs to log into the system at least once, in order to activate his/her profile in the system.*
3. *There is a session expiry of 60 minutes from the time you log in. The session is timed out when there is no activity for that amount of time. There is a SAVE or UPDATE functionality when providing input data to enable surveyors to continue from where they stopped. Use this tool frequently to avoid data loss.*

Figure 2: Log in page

If user forgot his or her password, the system can reset it. User clicks on "Forgot Your Password". The following screen will appear (Figure 3). Click on the **Reset Password** button.

Figure 3: Forgotten password

The system will bring up a screen that asks for username (Figure 4):

Figure 4: Reset password

The user enters his or her e-mail address and clicks OK. The system will e-mail a new password to the user's e-mail address.

After a successful login, the browser displays a page similar to the example in Figure 5 (or Figure 9) if you already have some active projects) showing the following information:

- **Welcome** to the user, **Log out** and language toggle links at the top right corner of the top pane;
  My Projects, **My Profile** and **Help** links just below the above information;

◻

◻ A menu bar containing **Research**, **Authorizations**, **Data and Tools**, **Plan Check**, **Recording, News, and Search** menus (which are described at the end of this document); **My Projects** pane showing **New Survey Project** and **Archived Projects** buttons, and a table of open (active) projects, if any, belonging to the surveyor. If a surveyor has no active (or open) projects, the My Projects part of the page will be displayed as seen in Figure 5. This is also what surveyors will see at the first login.
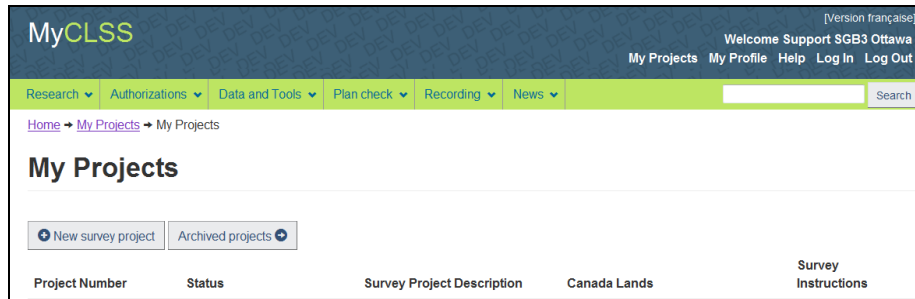
Figure 5: Successful Login

- Click on the language version hyperlink at the top right corner to toggle between French and English version of the application.

2.1 My Profile

My Profile is a tool used to view or update user profile with the ACLS and the SGB. A user can use this tool to change their password, address and contact information.

Click on the My Profile hyperlink to access the tool as shown in **Figure 6**:
- Click the **Change Password** button to change your password. The page displayed in Figure 7 allows you to perform the change. Note: there are no strict standards enforced for passwords within MyCLSS. It is recommended that you choose a password having at least 6 characters and include a variety of letters and numbers in the password to improve its security strength. If you have forgotten your password please use the "Forgot your password" function (see Figure 2), or contact the ACLS to have it reset.
- Click on the **View/Update Profile** button to display or change your contact information. The page shown in Figure 8 is displayed to you.
- To change other membership information CLS need to contact the ACLS.
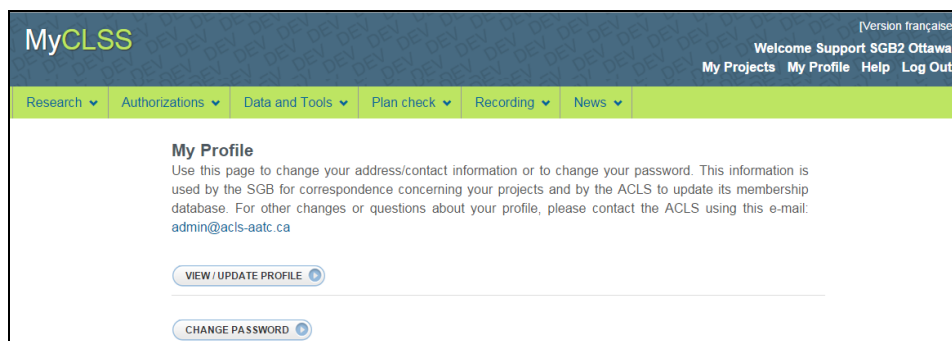
Figure 6: My Profile page

Figure 7: Change Password page

Figure 8: View or Update Profile

2.2 Help

The **Help** tool allows the user to access information that provides understanding of the system and how to use it, for example this User's Guide is accessed through the Help hyperlink.

Other helpful information will be available through this tool, for example:
- The requirements for setting up your system for optimal use of MyCLSS.
- A YouTube video providing an overview of MyCLSS.
- A list of known issues.

2.3 Company Representatives

In some cases 'Company Representatives' may need to access information on the system on behalf of the CLS' company or organization. The CLS will contact the ACLS to set up the company representative's profile. Note: when there is more than one CLS in an organization each CLS may wish to have two user id's – one as a CLS for their own projects and one as a Company Representative so that they have view/print access to the projects that have been created by other CLS' within their organization.

Company representatives can log into the system, and view/print the following information:
- The CLS' projects and project details
- Issued Survey Instructions
- Survey Documents
- Checklists
- Can create a checklist and print out the "Unanswered" version if the CLS has already created the Survey Document.
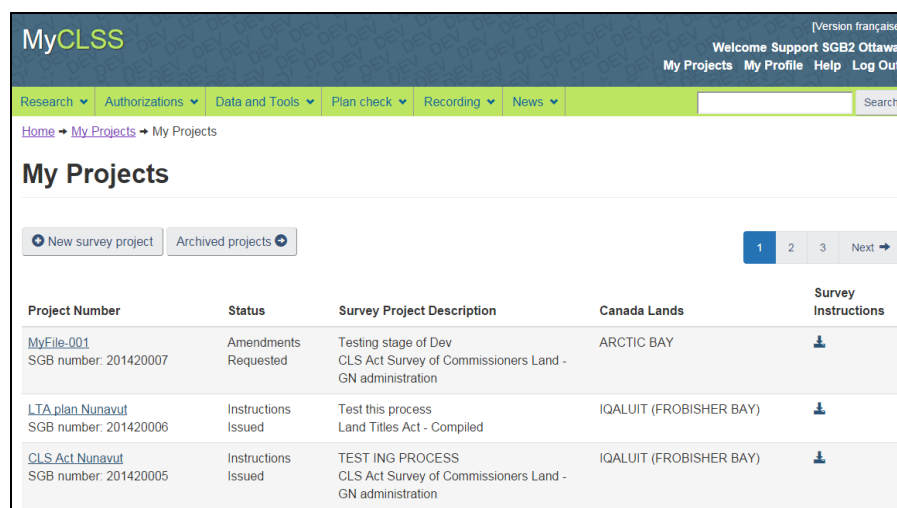
Company representatives cannot:
- Request Survey Instructions
- Create a Survey Document
- Answer checklist items

Note: The Company Representative role is not available for now.

3 My Projects

The My Projects pane contains a button by which a surveyor can create a new project, and also another button by which the surveyor can display archived projects in the project pane. The pane also displays a summary of all the user's open or active projects (if any), arranging the information by browsing order, with the current page number highlighted in the first row, and columns of **Project Number** (one portion as assigned by the surveyor and the other portion showing the SGB project number), **Status**, **Survey Project Description** (as defined by the surveyor), **Canada Lands** and **Survey Instructions** (Figure 9). If there are no active projects the pane is displayed as in Figure 5 after successful login. The system displays up to twenty projects per page in My Projects pane.

Figure 9: My Projects pane with some active projects

If My Projects pane contains active projects, you can click on a hyperlinked project number to display details of that project (Figure 10). This feature will be explained later, as we proceed with using the tool.

Figure 10: Expandable Project tree

4 Create a New Project and Request Survey Instructions

4.1 Create a New Project

The CLS uses the **New Survey Project** button to create a new project and request survey instructions. The procedure is as follows:

- Click on the **New Survey Project** button in My Projects pane. This will display the New Project page which has the **Project Information** tab highlighted (Figure 11). There are three tabs under the main tab, namely: **1. Survey Information**, **2. Support Documents**, and **3. Request Instructions**. Each of these tabs is highlighted sequentially, to guide the surveyor in completing the creation of the project and requesting instructions.
- Click on the highlighted **Survey Information** and supply the necessary input.

Supply data in the input fields. Some fields take information from drop-down lists. Fields with labels asterisked are mandatory and must have user input for a project to be created. It is recommended that the information be provided in the order shown on the form, from top to bottom.

o The **Surveyor's project number** field allows the surveyor to assign a customized number which is different from the SGB generated project number (the SGB project number is an auto generated number).

o Give a brief title in the **Survey project description** field. This text will be displayed with the project number that will be assigned by the SGB in the My Projects pane. It is suggested that you enter text that would help you to locate the particular project you are looking for on the My Projects page.
o **Permit Holder:** Use the drop down menu if you have one or many permit holders registered with the ACLS. Though not seen as mandatory here, if the project is being set up and the work is to be done through an organization holding a permit then the permit holder needs to be defined.
o Choose your region of survey from the **Region of survey** drop down box (see Figure 12).

New Project

PROJECT INFORMATION	SURVEY DOCUMENTS

❶ SURVEY INFORMATION   ❷ SUPPORT DOCUMENTS   ❸ REQUEST INSTRUCTIONS

* Surveyor's project number   User-File-01

* Survey project description   Test project

Permit holder   N/A

* Region of survey   ONTARIO

* Location of survey   AKWESASNE RESERVE

* Type of survey
○ Air Space Survey
○ Building Unit Survey
○ Compiled Plan
○ Explanatory Plan
○ Field Notes of Reestablishment and/or Restoration of Monuments (LS56)
○ Field Notes of Survey - Only
○ First Nation Land Management (FNLM) Land Description
○ Highway / Railway and Similar Right-of-Way Survey
○ Jurisdictional Boundary Survey
◉ Parcel Survey

* Denotes Required Field

Next

Figure 11: The Create a New Project page

o **Location of survey** will start displaying some search results as soon as two or more alphabets are typed (see Figure 13). To refine the list of locations to be displayed, the user needs to input at least two characters in this field for a search to be performed for locations containing those characters. Then select the location from the displayed list. This tool makes the information access fast by not displaying too many items on the page at one time. For example, typing "ak" in the input field displays the search results as in Figure 13. Click on the desired location name in the list, or refine the search by changing or typing more characters. The chosen user input can be seen in Figure 11.
o Choose your type of survey from the **Type of survey** radio buttons. When a location has been chosen, options are immediately displayed for the types of

survey that are available in the chosen region and the selected Canada Lands. Click on the desired option, e.g., "Parcel Survey" (Figure 11).

Figure 12: Selecting Region of Survey

Figure 13: Search Location of Survey

Note:
For Location of Survey searches involving Grid Areas, use the instruction given near the input field. This means:

- Type dash (-) instead of Degree (°) in Grid Area search; e.g., to search "GRID AREA 60°20'N" type "GRID AREA 60-20'N" or simply "60-20'N"

- After supplying all inputs under the Survey Information tab, click on the NEXT button at the bottom of the page to go to the document upload page.

4.2   Upload Support Documents

Once the project information has been supplied in section 4.1, the Support Documents tab is enabled, while the file upload tool is displayed (Figure 14). The page also shows that an SGB project number has been created. In the example screenshot below, the documentation required comprises of a) Approval documents received, and b) Survey sketch. You may also choose to upload a file containing additional information, though this is not a requirement here.

(Please note: The project number or user supplied data you see in a screen shot may not consistently appear in other screen shots. This is because screen shots were captured at various times.)

Figure 14: Upload Supporting Documentation

- Browse to your file location and input the documentation. **Documentation must be in PDF format.** Check the corresponding documentation checkbox. You can upload one file or any number of files for the documentation; check all boxes that are covered by the upload. File upload can be done in multiple sessions, allowing for updates of the upload, prior to submitting the request for instructions.
- Click on the **Upload** button to submit your file.
- A page is displayed enabling the **Request Instructions** tab (Figure 15).

4.3   Request Survey Instructions

Figure 15: Ready to submit request for Survey Instructions

- Click on the **Request survey instructions** button to send your request to the SGB.
- After the request has been sent, a response will be displayed showing the completion of the request for survey instructions and also the project number (Figure 16). There two project numbers: the surveyor's project number or reference, and the SGB's project number.
- At this point, you can click on the highlighted Project Information to view the project details and status, or click on My Projects on the menu bar to go to that page, or simply log out and wait for instructions to be issued.

Figure 16: System response to submitted request for Survey Instructions

4.4   Instructions Requested and Instructions Issued

After the request for instructions has been sent the surveyor can go to their My Projects pane to view the status of the new project.

- Sign in (if you have logged out) and click on My Projects to view active projects.
- If as a result of having many active projects the project you want to access is not seen on the display, you can either browse to the project or perform a search using the Search tool on the menu bar as shown in Figure 18.
- If specific survey instructions have not been issued, you will see that the status of your new project reads "Instructions Requested" (Figure 17) under the second column of the project listing.

- If specific survey instructions have been issued, the Status column will contain "Instructions Issued". Additionally, a hyperlinked icon will be shown under the Survey Instructions column, the last column in the project listing. Click on that link to view the issued instructions.

Figure 17: Status of requested survey instructions in My Projects pane

Figure 18: Searching in My Projects

Comment:
Please note that the Instructions Issued status may take some time to happen, as it depends on action by SGB staff, which in turn depends on the day and time of your requesting survey instructions, and whether there are issues surrounding your request, which may necessitate additional SGB follow ups with you.

5 Create a New Survey Document and Add Checklists

After survey instructions have been issued, this tool is enabled to allow a surveyor to create a new Survey Document. A Survey Document can be a survey plan or another item such as field notes. All Survey Documents will be tracked using the MyCLSS application, but only certain types of Survey Documents require a checklist and are subject to a fee from the ACLS. A list of

available Survey Documents for the selected Survey type is presented to choose from, e.g.: Parcel Survey, Jurisdictional Boundary Survey, etc. A project may have more than one Survey Document.

- Click on the hyperlinked project number (see Figure 18) to proceed with creating a survey document. The project information page is displayed, with the Survey Documents tab enabled (Figure 19). Below the tab, the input fields for the name and type of the survey document are presented, and at the bottom of the page, all uploaded project documents are listed.
- Fill in the input fields on the page that is displayed (Figure 20). Supply a name with which you can easily recognize your survey document.

Figure 19: Creating a new Survey Document

Survey Document Type: Select from the drop-down list (Figure 20). This list is generated based on certain information provided when requesting survey instructions. If appropriate, the CLS can prepare more than one Survey Document for a specific project. If an expected Survey Document type is not found in the dropdown list then there may be a conflict with the information used to request survey instructions. In that case the CLS should contact the SGB Contact to discuss it.

Figure 20: Survey Document inputs

- Click the **Next** button to proceed. A page is displayed showing the inputted Survey Document name assigned to a document tab. It also shows that Checklist name is not yet assigned (Figure 21). Since multiple survey documents are allowed, you may continue creating more survey documents without necessarily completing the checklists for prior ones. The "+" symbol is used to expand to show other survey document names if they exist. (Creating additional survey document will be discussed in a later section.)

Figure 21: Survey Document created

- Click the **Next** button to continue. The **Create Checklist** page is displayed (Figure 22).

Figure 22: Add a Checklist

- Fill in the input fields:
  o Supply a name in the Checklist Name field.
  o If the survey includes a natural boundary, click on the Checkbox.
  o Georeferencing is automatically included in this version of the Checklist, which is a change from the optional choice in the previous version.

- Click on the **Create Checklist** button to proceed, or **Cancel** if you have changed your mind.
- The created Checklist shows the Checklist categories to be completed before ACLS issues a checklist number (Figure 23). Completion of these categories in the **View / Update Checklist** page is described in the next section.

6 View/Update Checklist

The CLS user or the company representative can always view their checklists. Before the final submission of a checklist, CLS can update, reset or delete the checklist. Checklists cannot be edited or deleted after submission. Figure 24 shows an example of a successfully created checklist which is ready to be populated and updated.

Notes:
The user can print any page of a checklist or any page in the system by using the Browser's Print functionality.

Users must disable pop-up blockers in their browsers as some of the functions of this application use pop-ups.

The **Update Checklist** button saves the answers to checklist categories and items.
The **Save Checklist** button saves all changes to checklist input including the checklist name and the checkboxes.

Figure 23: View and Update Checklist

6.1 Checklist Categories and Items

A checklist is comprised of categories, each of which has a list of items to be responded to. Clicking on a category hyperlink takes you to the list of items that corresponds to that category, as shown below for Plan Title (Figure 24).

Figure 24: Unanswered Checklist items

- All checklist items must be answered. You can click on "Yes" or "N/A" and supply comments using the "Comments…" input field. Comments are voluntary. Adding a comment, particularly if "N/A" is chosen, is meant to be used as a tool for the CLS to document their rationale.

Note: You will not see the "Check All" hyperlink shown in the above screen shot. This is only used during the development and testing of the application.

- You can save your responses in a category at any point by clicking **Update**. You can then come back to the same category at a later date or time to complete the responses. Checklists continue to be editable until they are submitted. **Allow time for the View/Update page to automatically refresh.**
- To go back to the list of categories, click the **Update and Close** button.

MOUSE-OVER Tool

Holding the mouse over the rectangular icon by the checklist item displays some relevant information, with corresponding reference to the National Survey Standards, as well as the ACLS practice manual and other references, that helps the user to understand the item. An example is given in Figure 25. The mouse-over text shows in blue, in a rectangular box. Move the mouse away (or click in a blank area of the page) for the text to disappear. The mouse-overs are meant as a quick and easy reference for you. If you want to print the mouse over text you can note what sections of the Standards are being referred to and then access the details through a link on the Project Details page or through a link on the green menu bar.

Figure 25: Mouse-over on Checklist item

- The progress of checklist answers is indicated by the number of items completed for each category (Figure 26). These counters are refreshed each time the **Update and Close** button is selected.

Figure 26: Progress of checklist answers

6.2 View/Print Checklist

This allows the user to view or print completed and uncompleted checklists. Both the CLS and the company representative can view and print checklists.

- You can always use the hyperlinked Checklist Name or Number under the Survey Document tab to go to the View/Update Checklist page at any time during the process. Note that if your project has been closed you will need to view your archived projects.
- You can view each category by clicking on the hyperlinked name (Figure 26).
- The View/Print tool renders the checklist in its current state into a PDF that can be viewed using a PDF viewer such as Adobe Reader, then once the PDF is open, it can be printed (there is no direct Print function).
- The **View/Print Extended Checklist** button is used to access a more detailed version of the checklist, while the View/Print Checklist gives a short version.

6.3 Reset Checklist

Click the **Reset Checklist** button to reset a partly completed checklist (or a completed checklist that has not been submitted; there isn't a checklist number yet) for editing. This tool is not available after submitting the checklist, but it is a useful tool if the user, for some reason, wants to reset all responses back to "Unanswered". A pop-up will ask for your confirmation (Figure 27).

Figure 27: Reset a Checklist

6.4 Delete Checklist

Click this button to delete a checklist that has not been submitted. Only the project's CLS can delete a checklist. **Completed checklists cannot be deleted**. A confirmation screen will pop up for the CLS to confirm delete (Figure 28).

Figure 28: Delete a Checklist

6.5 Save Checklist

Click the **Save Checklist** button to save the checklist. You can save and come back to it later to edit, providing the submission has not been done. **Checklists that have been submitted cannot be edited,** but can be viewed at any time.

6.6 Submit Checklist to ACLS

When all the categories have been fully responded to, the **Submit Your Checklist to ACLS** button becomes enabled; before then it is not enabled (Figure 29).

Note: Please notice the change from the previous version of MyCLSS: here, there is only one button instead of two buttons on the Checklist page. There is no upload of the plan document at this time. The Document Submission tool will be presented after completing the ACLS Levy Form.

Also, the **View Notice of Fees** and **View Practice Review** buttons at the top of the page are disabled at this point as those records have not been created yet.

Figure 29: Submit Checklist to ACLS

- Click on the **Submit Checklist to ACLS** button to proceed. This will obtain a Checklist Number from the ACLS.
- A page – **ACLS Levy Form** is displayed (Figure 30). The Checklist Name and Number are displayed on the top of the page.
- Complete the Form and click on the **Submit Levy Form** button to proceed.

Figure 30: ACLS Levy Form

- Wait for the page to refresh.
- The system displays the Submissions Upload page as seen in Figure 33. To view your checklist, click on the hyperlinked checklist on that page to access the View/Update Checklist page which shows the Checklist number and date issued (Figure 31). There is no more editable field, so the checklist cannot be updated again.
- To go from the View/Update Checklist page back to the Survey Documents page, click on the BACK TO PROJECT button.

Note: At this point, you can only view checklist answers; the checklist cannot be updated again. Example, clicking on the Plan Title category hyperlink will display the non-editable checklist as in Figure 32.

Figure 31: Professional Review Completed

Figure 32: Non-editable checklist

7   Final Submissions

7.1   Prepare Documents for Submission

With the implementation of the e-Recording initiative, there is a significant change in the submission process. All documents, including the digital survey plan, survey report, digital spatial file and others are uploaded through MyCLSS. Ideally, the digital survey plan will be produced in the PDF/A-2B format and digitally signed by the surveyor. This is the format that is suitable for digital archiving and long-term preservation. The procedure for creating the required format and securely signing it digitally is described in another documentation that will be made available to surveyors. Surveyors are required to register into the NRCan myKEY infrastructure.

In cases where Mylar submissions are allowed, surveyors will still need to upload the PDF survey plans with other digital documents through MyCLSS. The PDF plans are needed as a condition attached to completing a checklist, and will be used by the ACLS Practice Review.

The following steps describe the process for submitting digitally-signed survey plans:

- Add the Checklist Number to the plan, below the SGB Project Number and the SGB File Number (usually at the bottom right of the plan).
- Create a PDF/A-2B version of the survey plan.
- Place your digital signature and seal in the Surveyor's endorsement block. After this, you should not make any changes to the digitally signed plan.
- Prepare the digital spatial file, survey report, and any other documents for upload.

7.2   Document Upload and Submission

The next logical step after completing a checklist is to upload documents and complete the submissions. The Upload tool is shown in Figure 33.

It is mandatory to upload a survey plan and a digital spatial file before the submission is enabled. All uploaded documents are shown in the **Project Documents** section, and can be removed prior to click the **Submit for Recording** button. The uploaded document used for requesting survey instructions is also shown in the **Project documents** section, but cannot be removed.

Figure 33: Submissions - Upload Tool

- You first need to select if your submission is one with or without a digital signature using Entrust. Beside **Submission Type**, you need to choose the type of submission you will use. Select **Physical (mylar or paper)** if you want to upload a survey plan which is not digitally signed or select **Digitally signed using Entrust** if you want to upload a digital survey plan containing a digital signature. Either way, the uploaded survey plan is shared with the ACLS for practice review purpose. If you upload a survey plan which does not contain your digital signature, you must send the mylar plan by mail to the SGB for your submission to be complete.
- Beside **Survey Plan**, browse to the file location and select the PDF file of your survey plan.
- You can click the **Upload** button for each input to upload, or choose multiple inputs before clicking the **Upload** button. Figure 34 shows the case where a digitally signed survey plan is uploaded.
- Supply all other files (Digital Spatial file, Survey Report, etc.).
- Click the **Upload** button.
- The selected files are uploaded, and the **Remove** button is enabled in the **Project documents** section. The **Submit for Recording** button is also enabled.

Figure 34: Submission - Uploaded Files

- For every uploaded document, the status "Uploaded" is shown against it in the survey document pane.
- If you are satisfied with your upload, click the **Submit for Recording** button.
- After submission, the **Submission complete** acknowledgment is displayed and the progress status for the current survey document is shown in Figure 35. Also, the **Remove** buttons are disabled in the **Project documents** section.

Figure 35: Submission Complete

- You can use the hyperlinked **ACLS Checklist Name** or **ACLS Checklist Number** (circled by a red line) to access your checklist.
- Notice the *Complete* status for **CLS Professional Review**, **ACLS Levy Form** and **Finalization and Submission**. **SGB Final Submission Review** now has *In Progress* status.
- Wait for next response or update of the project status from SGB.
- If you have uploaded a survey plan that was not digitally signed, the status of the project will be *SGB Awaiting Mylar* as seen in Figure 36. In that case, send your completed mylar plan by mail to the SGB.

Figure 36: Submission of Non-digitally Signed Plan

8 Plan Review

After a final submission is received at SGB, SGB staff will start the process of critical plan review. The staff works with the appropriate Land Administration agencies in getting the plan reviewed and approved. The result of a review can lead to either a successful plan approval or unsuccessful approval. If any critical issues are encountered the plan is not approved, and the critical issue solution, described later, will be invoked.

8.1 Successful Final Plan Review

- If the plan review is successful (plan is approved by SGB), the result from SGB will automatically update the project in MyCLSS by changing the status to **Complete** for **SGB Final Submission Review** (Figure 36).
- When a CLSR Number is assigned in the SGB plan recording system (SRIS), MyCLSS is updated with the CLSR Number recorded against the **CLSR Number** label in the Survey Documents pane. Once an image of the Survey Document has been created and attached to the SRIS record, the CLSR Number will be shown as a hyperlink and by clicking on this number you will be able to access a digital image of the Survey Document for viewing or downloading.
- The procedure for unsuccessful final plan review is described in Section 8.3.

Figure 36: Plan is approved and recorded

8.2 Project Information

Clicking on the hyperlinked **Project Information** tab displays the details of project-level information. This page enables the user to view survey instructions and request amendments (Figure 37 and Figure 38). It also displays project summary, Endorsement blocks, Reference and support documents (a hyperlink to the National Standards of the Survey of Canada Lands), and uploaded project documents.

- Click on the hyperlinked date under the Survey Instructions section to open or save the PDF version of the Survey Instructions that were issued for this project. You can print the file after opening or saving it.
- Click on the **Request Amendments** button if you need the Survey Instructions amended (this is fully described in the next section).

Figure 37: Project Information

Figure 38: Project Information (continued)

8.3 Critical Issues - Unsuccessful Plan Review

The SGB Plan Review process goes through a Critical Issues list. If there is one or more critical issue, the Survey Document being reviewed is placed under the Critical Issues notification, and Surveyor's action will be required for the plan to be approved.

Let's say there is a Survey Document named *SD-Test2* with Checklist Number 160. The Surveyor has completed final submissions to SGB, and SGB Final Submission Review is *In*

Progress (Figure 39). If there is a critical issue, the project is put in the Critical Issues notification mode. A Critical Issue Alert will be shown against the project on My Projects page (see the alert triangle marked red in Figure 40).

Figure 39: Project Status before Critical Issues

Figure 40: Critical Issue Alert on My Projects page

- Click on the hyperlinked Project Number to open the project workflow.
- The Survey Document workflow shows the Critical Issue notice and Resolution Options (Figure 41). Surveyor can choose Option 1 and amend the checklist, or Option 2 to appeal the critical issue assignment.
- **Option 2:** The surveyor appeals the critical issue decision. This appeal would be that the surveyor contacts SGB and convinces SGB that it is not a case of critical issues. The SGB will then remove the critical issue message and approve the plan. The **SGB Final Submission Review** status will then change to COMPLETE.

The following steps describe **Option 1**:

Figure 41: Critical Issues options

- Click on the Amend Checklist button in Option 1 to go to the Checklist page.
- Give a Checklist Name (Figure 42).
- Check the box for Copy Previously Completed Checklist to retain your previous answers.
- Click on the Create Checklist button, and submit your checklist to the ACLS.

Figure 42: Create a new Checklist for Critical Issues

- The new Checklist Name and Number will be shown at the top of the Levy Form (Figure 43). When a Checklist is amended, the new number will consist of the old number and a letter added to that number.
- Complete the Levy Form.
- If new monuments were placed, please indicate the number else indicate "0" in the "# New Monuments Placed" box; click on the Calculate Fees button.

Figure 43: Levy Form after Critical Issues

- Click on the Submit Levy Form button, to send the form to the ACLS.
- Upload and submit final documents in the Submissions page (Figure 44).

Figure 44: Submission after Critical Issues

After the new submission is done, the Critical Issue notification/alert is removed from the workflow, and the status goes back to *In Progress* for SGB Final Submission Review (Figure 45).

Figure 45: Final Submission completed after Critical Issues

9   Request Amendment

A CLS can request amendments to a project (Survey Instructions) after surveying instructions have already been issued, or a checklist has already been completed. If amended survey instructions affect a Survey Document that the CLS has already completed a checklist for, the CLS will have to redo the checklist. In this case a checklist number already exists for the affected Survey Document, and the CLS has the choice of starting a fresh checklist or starting from a copy of the previous checklist that was associated with the Survey Document being amended.

9.1   Amendment Request not affecting Existing Checklist

Let's assume that an amendment to the Survey Instructions is needed for a project. The following steps describe the process:

- Click on the hyperlinked Project Number in the My Projects page.
- Click on the Project Information tab to display the Project Details page (Figure 46).
- Click on the **Request Amendments** button in the Survey Instructions section to display the Amendment Request page (Figure 47).

NOTE: In this example, no checklist exists, so there is none to amend.

Figure 46: Project Information - Request Amendment

Figure 47: Amendment Request input

- Click the **Next** button to continue.

An optional document Upload section is displayed to allow you to upload an additional file if so desired (Figure 48).

- Click on the **Submit Amendment** button to send your request. An acknowledgment of the request is displayed (Figure 49).

Figure 48: Submit Amendment Request

Figure 49: Amendment Request Acknowledged

- Wait for Amended Survey Instructions from the SGB. At this point, you will not be able to carry out any action on the project.

When the new Survey Instructions are issued, the Project Information is automatically updated: the date of the Amended Instructions is added as a hyperlink in the Survey Instructions section, and the original Survey Instructions is placed in the **Previously issued** sub-section (Figure 50).

- Continue with the survey process as previously described.

Figure 50: Amended Survey Instructions issued

9.2   Amendment Request affecting Existing Checklist

By the business rule, if a checklist has already been submitted to the ACLS, that is, a Checklist Number exists, amending the survey instructions will require a new checklist to be completed, and a new Levy Form also completed.

As an example: In this example we have one Survey Document - *SD-Test* (Figure 51) for which a Checklist (Number 207) has been completed. So Amendment Request will affect this survey document and an amended checklist needs to be completed for it.

Figure 51: Survey Document affected by Amendment Request

- Click on the **Request Amendments** button in the Project Information page. An input page will be displayed.
- Check the checkbox for SD-Test if not already checked, the Survey Document affected by the Amendment Request (Figure 52).
- Supply a description of the request in the input box.
- Click on the **Next** button to save your input. An optional document **Upload** and **Submit Amendment** section is then displayed (as seen in Figure 48).
- Click Submit Amendment to send your request.

Figure 52: Request Amendment with Amend Checklist

After amended instructions have been issued the project's Survey Document will show that the new status is to "Amend Checklist" against ACLS Checklist Name (Figure 53).

Figure 53: Amend Checklist tool

- Click the Next button to go to the Checklist page to amend it.
- Supply a Checklist Name.
- Click on the box for *Copy Previously Completed Checklist*, if you want to retain your answers to the previous checklist (so that you don't have to go over all the questions again) (Figure 54).
- Click on the Create Checklist button.

Figure 54: Creating Amended Checklist

- Complete the new checklist and click on the Submit Your Checklist to ACLS button to proceed (Figure 55).

Figure 55: Copied Checklist

The Levy Form is displayed showing the new Checklist Name and Checklist Number (Figure 56). The Check number is the previous number plus the letter "A" added to it. The alphabetic character will be incremented as more amendments are made to the survey document.

ACLS Levy Form

Checklist Name: Test-CL-2
Checklist Number: 207A

☐ Add your checklist number on the plan

Billing Address   615 Booth Street, Ottawa, ON, K1A0E9 ▾

\# New Monuments Placed: [＿＿＿]   (CALCULATE FEES ▶)

PLAN FEE:	0.00
MONUMENT FEE:	0.00
Total:	0.00

NOTE: You are at the final stage of the plan submission process. After clicking on " **Submit** ", please send your final hard copy package as required by your specific survey instructions.

(CANCEL ▶)   (SUBMIT LEVY FORM ▶)

Figure 56: Levy Form and New Checklist Number

- Complete the Levy Form and submit. Remember to type in the number of new monuments placed ("0" if no new monument is placed), and click on the Calculate Fees button. ***The Submit Levy Form button is not enabled until all fields have been completed***.
- After the Levy Form has been submitted, the process brings up the Submissions Upload page (Figure 57). This page shows the Amended Checklist Number (the letter "A" added to the first number that was amended).
- Complete the upload and submission as described before.

Figure 57: Submission for Amended Checklist

After the upload and submission, the SGB Plan Review will continue normally, as described for successful reviews prior.

9.3   Creating Additional Survey Document

You can create additional Survey Documents in a project, as the system allows for multiple Survey Documents. Each Survey Document has its own separate workflow and Checklist. If creating a new survey document in a project changes the context of the Specific Survey Instructions, it may be necessary to first request amended survey instructions to enable its creation. For example, an amendment request would be done in creating a new survey document, to enable a plan with additional lots.

Use the following steps to add another survey document:

- Click on the Survey Documents tab.
- Click on the addition symbol [ ] and supply the new inputs (Figure 58).
- Click **Next** to create the document and add the new workflow.
- The milestone status of the new Survey Document is shown in Figure 59.
- Complete a Checklist and continue with the project as already described before.

Figure 58: Create Additional Survey Document

Figure 59: Additional Survey Document Checklist

10 View Checklist Report and Invoice

You can view and print Checklists and Invoices.

- Click on the hyperlinked Checklist Number in the Survey Documents page to bring up the View/Update Checklist page (Figure 60).

Figure 60: View Checklist Report

- Click on the **View/Print Checklist** button to display the checklist report in PDF format, part of which is seen below (Figure 61). This figure shows a report which has four pages. Note that the time stamp is based on Pacific Time.

Figure 61: Example of Checklist report

You can also view a fully detailed Checklist report by clicking on the **View/Print Extended Checklist** button.

Clicking on the **Notice of Fees** button from the **View/Update Checklist** page will display the invoice as seen here (Figure 62).

Figure 62: View Invoice

11 Project Closed

Projects are closed by SGB. When a project is closed, it will no longer appear in the surveyor's active projects page rather, it will be moved to Archived Projects.

- From My Projects page, click on the Archived Projects button to view closed project (Figure 63). Toggle back and forth between Active and Archived projects.

Note:
Once a project is closed the information about it becomes Read-Only, therefore no actions such as Requesting Amended Instructions or initiating new Survey Documents can occur. If these actions are needed then the CLS should consult with the SGB.

Figure 63: Closed projects archived

12 MyCLSS Menu Bar

Figure 64: MyCLSS menu bar

The MyCLSS menu bar (Figure 64) consists of the following items:

- Research
- Authorizations
- Data and Tools
- Plan Check
- Recording
  News
  A Search box (when logged in)

These menus are used to help surveyors perform related online research, have access to survey records and databases, computational tools, regulations, and process documentation. Each one is described below.

12.1 Research Menu

Use the research menu to look for information at various online locations that are shown in **Figure 65.**
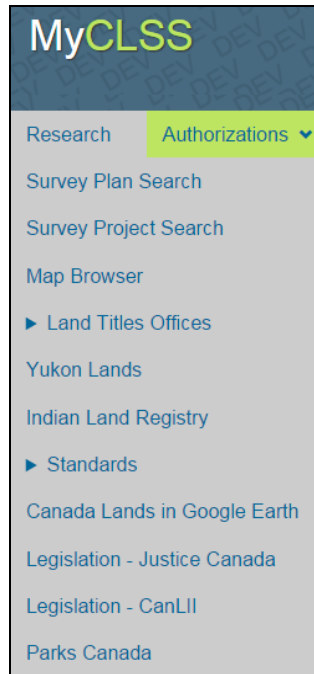
Figure 65: Research menu

You can search survey plans and survey projects; browse maps; access information on Yukon, Nunavut and Northwest Territories Land Title information; and see other information contained in the hyperlinked menu elements. More information can be accessed through the sub menu items, for example **Standards**, as shown in Figure 66.
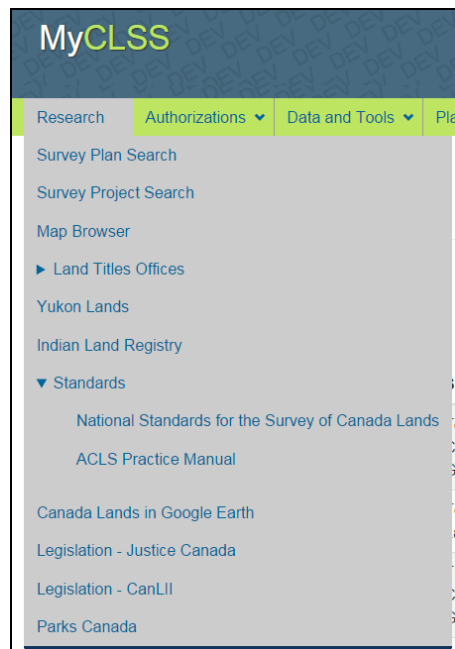

Figure 66: Example of sub menu items

12.2 Authorizations Menu

This menu can be used to access information concerning the requirements to obtain permission to do a survey, requesting survey instructions, and others, that are involved before field work, and also showing what is involved after field work (Figure 67).
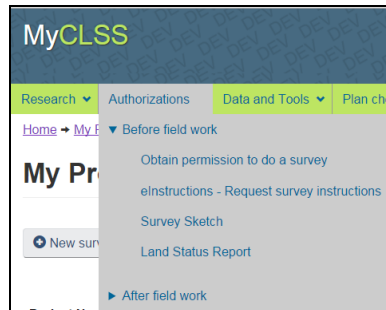

Figure 67: Authorization menu

12.3 Data and Tools Menu

This menu is used to access online geospatial tools and databases that are shown below (Figure 68). The menu items are hyperlinks to the respective web sites and data repositories.

Figure 68: Data and Tools menu

12.4 Plan Check Menu

The Plan Check menu (Figure 69) contains a hyperlink that leads to a short overview of the Checklist process.
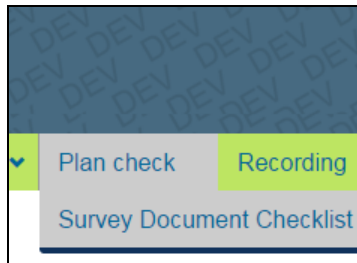
Figure 69: Plan Check menu

12.5 Recording Menu

The Recording menu (Figure 70) contains the Recording hyperlink to the description of the plan recording process, and also eRecording hyperlink to future development of electronic recording of plans.
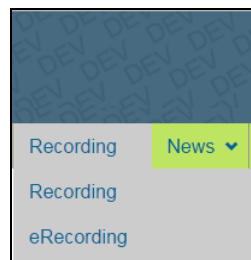

Figure 70: Recording menu

12.6 News Menu

The News menu is used to view current and archived news that may be supplied or placed by SGB and ACLS (Figure 71).
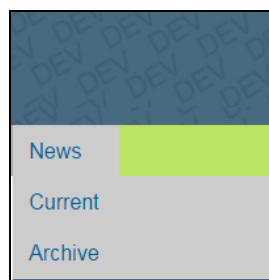

Figure 71: News menu

12.7 Search Tool

The Search menu is a very useful tool to search on keywords in the Project Number, Status, Survey Project Description, and Canada Lands fields (Figure 72). It is a quick way to access a project instead of browsing through many projects.

Figure 72: Search menu