BC OnLine

Account Management System
User's Guide

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If you have any questions, please contact:

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Table of Contents

Typographic Conventions

Typographic conventions are used with the following meanings:

Screen names and field names are capitalized. For example:
In the Transaction screen, move to the Search field.

Buttons and other "clickable" items appear in bold. For example:
Click **Submit**.

Required input (that you enter exactly as shown) appears in Courier font. For example:
Type: `BC OnLine`

Variable input (that you provide) appears in italic Courier font. For example:
Type your `Password`

System messages (and other screen output) appear in bold Courier font. For example:
PASSWORD CHANGE COMPLETED

Tips, Notes, Important Notes, Cautions, and Warnings appear as shown below:

Tip
A way to make your work easier.

Note
Further information about the current subject.

Important
An emphatic note about the current subject.

Caution
An important point that could prevent an inconvenience.

Warning
An important point that could prevent a financial loss, or loss of data.

Account Management Overview

As a BC OnLine client, it is your responsibility to ensure that your deposit account contains sufficient funds to maintain service. Prime Contacts and Contacts can use the Account Management System to display your account balance, manage your account and userids, and print or download your account statements. Authorized users can send electronic cheques to BC OnLine to update your account balance. All account management functions are grouped together in the Account Management Menu.

Depending on how your account is set up, your Account Management Menu will contain some or all of these selections:

- **Account/Userid Management** lets you display and update information about your BC OnLine deposit account and userids. See Managing Your Deposit Account and Userids on page 6.

- **Print Account Statement** lets you print your statements on your local printer. See Printing Account Statements on page 22.

- **Download CSV File** lets you download your statements as data files. See Downloading Account Statements on page 23.

- **Electronic Cheque** lets you transfer money to your BC OnLine deposit account. See Electronic Cheque on page 15.

- **EFT Payments** lets you review your payment records. See EFT Payments on page 18.

- **Product Delivery Options** lets you specify where each BC OnLine service delivers products such as notifications, search results, tax certificates, assessment reports, etc. See Product Delivery Options on page 19.

- **Change Existing Account** lets you use the Online Change Form wizard to request changes to your BC OnLine account. See Using the Online Change Form on page 14.

- **EFT Information** lets you view your current EFT Agreement. See EFT Information on page 19.

Before using the Account Management System, make sure to review these points:

- Designate Contact Persons for Your Organization (see page 4).
- Display Your Deposit Account Balance (see page 4).
- Staffing Changes (see page 4).

Designate Contact Persons for Your Organization

Management of BC OnLine userids is the responsibility of your organization's Prime Contact or Contact.

If your organization has many userids, please designate at least one person as a Prime Contact who will be able to reset passwords, revoke userids, grant access for userids, and display your deposit account.

Your Prime Contact person will have authority to designate people as Contact users. This allows the Prime Contact to delegate some responsibilities.

If you wish to have the Prime Contact duties re-assigned from one individual to another, please complete the Online Change Form's Reassign Userid section and submit the form to the BC OnLine Administration Office for processing.

Note that the Prime Contact does not necessarily have to be the individual designated as the administrative contact for receiving the BC OnLine statements and other mail. See Types of BC Online Userid on page 5 for an explanation of the three types of userid.

Display Your Deposit Account Balance

It is important that you monitor your account balance to avoid interruption to your business. Your account can be revoked due to lack of funds.

Anyone in your organization with Contact or Prime Contact authority can display the balance of your deposit account. Users with basic userids cannot access your deposit account information.

For more information about how to display your account balance, see Displaying Deposit Account Information on page 7.

Staffing Changes

When someone leaves your organization, a Contact or Prime Contact can reassign their userid to a new employee or keep the userid as a spare for future use. If you run out of userids, the Prime Contact can use the Online Change Form to request more. It can take one or two days to process a new userid request.

Types of BC Online Userid

There are three types of BC OnLine userid: Primary Contact, Contact, and Basic. Each type has its own level of power and authority, as shown in this table.

Primary Contact	Contact	Basic	
✔	✔	✔	Access to on-line searches, registrations, electronic filings, and permits
✔	✔		Access: Grant access to any revoked "Basic" userid (1)
✔			Access: Grant access to a revoked "Contact" userid (1)
			Access: Grant access to a revoked "Primary Contact" userid (2)
✔	✔		Access: Change Name, Set to Spare, or Revoke the access of any "Basic" userid (1)
✔			Access: Change Name, Set to Spare, or Revoke the access of a "Contact" userid (1)
			Access: Revoke the access of a "Primary Contact" userid (2)
✔	✔		Account Information: Display current balance of your account
✔	✔		Account Information: Change or display information about your account
✔	✔		Account Information: Display total of day's debits and credits
✔	✔		Account Information: Print daily, weekly, or monthly statements
✔			Authority: Change a "Basic" userid to a "Contact" userid
✔			Authority: Change a "Contact" userid to a "Basic" userid
			Authority: Change a "Primary Contact" userid to a lower userid (2)
			Authority: Change another userid to a "Primary Contact" userid (2)
✔	✔	✔	Electronic Cheque: Initiate an electronic funds transfer (3)
✔	✔		Low Balance Warning: Add or change the warning amount
✔	✔		Passwords: Reset password for any "Basic" userid (1)
✔			Passwords: Reset password for a "Contact" userid (1)
			Passwords: Reset password for a "Primary Contact" userid (2)
✔	✔	✔	Userid Information: Display your userid, including authority
✔	✔		Userid Information: List the userids attached to your account
✔	✔		Verification Word: Add or change oral password for your account

(1) "Pending" status changes for userids are processed automatically on the hour and every ten minutes thereafter.

(2) Not available as a self-serve feature. BC OnLine staff will do this for you.

(3) Pre-approval is required. BC OnLine recommends that users of this feature have a Primary Contact userid or a Contact userid in order to display account balance.

Managing Your Deposit Account and Userids

When you select Account/Userid Management from the Account Management menu, you will go to the Userid Management screen, where your own userid's information will be displayed. Any user can display his or her own information. Only users with Contact or Prime Contact authority can display and update account information, or display and update another userid's information.

From this screen, you can access the following functions:

- Displaying Deposit Account Information (see page 7).
- Updating Deposit Account Information (see page 8).
- Displaying and Updating Individual Userids (see page 10).
- Listing and Updating all Userids (see page 11).

Note
Some account settings (e.g., change EFT or bank information, add new user, change account name, add products) require completion of the Online Change Form. See Using the Online Change Form on page 14.

Displaying Deposit Account Information

If you have Contact or Prime Contact authority, you may display your Deposit Account screen using either of two methods:

- From the Userid Management screen, click the **Acct. Management** button in the BC OnLine button bar.
- From any Account/Userid Management screen, open the **Action** drop-down selection box near the top of the screen, then click the **Select Account or Userid** option. Enter your BC OnLine *account number* in the Account/Userid field, then click **Submit**.

The Account Management screen will appear. Note the small table in the upper right-hand corner of the Account screen, which looks like this:

Last Balance:	$1000.00
Adjustments:	$0.00
Payments:	$0.00
Debits:	$0.00
Remaining:	$1000.00

Last Balance shows your account balance as calculated at the close of the last BC OnLine business day.

Adjustments shows any credits or data entry corrections made to your account since "Last Balance" was calculated (that is, adjustments made today).

Payments shows any deposits to your account since "Last Balance" was calculated (that is, deposits processed today).

Debits shows the cost of searches, registrations, network charges, and any other requested services performed since the "Last Balance" was calculated (that is, today's charges).

Remaining shows the true balance of your deposit account, although the amount shown in "Debits" will not be deducted from your account until after the close of business that day.

See Updating Deposit Account Information on page 8 for details.

Updating Deposit Account Information

From any Account/Userid Management screen, a Contact or Prime Contact can open the **Action** drop-down selection box near the top of the screen, then click the **Update Account/Userid Information** option. Enter your BC OnLine *account number* in the Account/Userid field, then click **Submit**. The Account Management screen will appear in update mode. You can click on the following updateable fields, or use the Tab key to move from one updateable field to the next.

Address

The address is the street or mailing address for your account. Key in the *P.O. Box Number* or *Suite Number* and the *Unit Number* and *Street Name* that you wish to use.

> **Tip**
> Use the first address line to add a branch or additional title information to your account (if applicable) and enter your address on the second line.

City

The name of the *city* that forms part of your mailing address. Key in the full name (do not abbreviate).

Province

The two-character *province code* that forms part of your mailing address. Key in the official abbreviation of your province (or state).

Country

The name of the *country* that forms part of your mailing address. Key in the full name (do not abbreviate).

Postal Code

The six-letter/number *postal code* that forms part of your mailing address (or up to nine numbers if a zip code). Key in a postal code as A1A 1A1 or a zip code as 22222-3333.

Acct Contact

The *name* of a person that you wish to be your account coordinator. Key in the full name of the person as First Name, Last Name. Note that this person need not be a user on your account.

Fax

The *fax number* is optional and may be changed or removed from your account. Key in the full fax number as (250)888-8888.

Phone

The *phone number* is for your account is usually for the account coordinator or the main company number. Key in the phone number as (250)888-8888.

VWord

The Verification Word for your BC OnLine account. Key in the *verification word* that you want to use. This security word for your authorized users can be used over the

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telephone when requesting that services be charged to your BC OnLine account. The verification word is also used in any password protected documents sent to you by staff at BC OnLine.

Caution
Since the verification word is used by BC OnLine to verify the charging of services to your account, you should take the necessary precautions to ensure that the word you select is not obvious and remains confidential.

Stmt Freq
The Statement Frequency selection box lets you control how frequently your account statement will be generated. Click the box and choose Daily, Weekly, or Monthly.

Warning $$$
A low balance warning level. Key in the *dollar amount* of your choosing with a decimal point (for example, `500.00`). As a BC OnLine subscriber, it is your responsibility to maintain sufficient funds on account to cover all fees and charges your users incur. The low balance warning feature alerts users when the balance in your deposit account drops below a specified amount. Your organization's Contact or Prime Contact can set the warning level to any amount required. This feature helps you avoid the interruption to your business that will occur if your BC OnLine access is revoked because your deposit account has been depleted.

Printer Node
The default printer for dedicated circuit users or terminal emulation users for all userids in your account. If everyone in your account connects to BC OnLine via the Internet, leave this field blank.

After making changes to any of these fields, click **Submit** and the system will confirm that the update has been made.

Tip
To change your company name see Using the Online Change Form on page 14.

Displaying and Updating Individual Userids

When you select Account/Userid Management from the Account Management menu, you will go to the Userid Management screen, where your own userid's information will be displayed. Any user can display his or her own information. Only users with Contact or Prime Contact authority can display or update another userid's information.

Selecting another Userid for Display

From any Account/Userid Management screen, open the **Action** drop-down selection box near the top of the screen, then click the **Select Account or Userid** option. Enter the `userid` that you want to display in the Account/Userid field, then click **Submit**.

Updating Userid Information

From any Account/Userid Management screen, open the **Action** drop-down selection box near the top of the screen, then click the **Update Account/Userid Information** option. Enter the `userid` that you want to update in the Account/Userid field, and click **Submit**.

Click the updateable fields, or Tab from one field to the next. If you are unable to update these settings, please ask a Contact or Prime Contact to submit an Online Change Form on your behalf.

Auth (Authority Level)
This can only be set by the Prime Contact or by the BC OnLine administration office. The BC OnLine administrative office sets one userid in your account to `P` (Prime Contact). The Prime Contact can then set the rest of your account's userids to either `C` (Contact) or blank (basic user). To reassign Prime Contact duties from one individual to another, please use the Online Change Form.

Printer Node
The default printer for dedicated circuit users. If you connect to BC OnLine via the Internet, leave this field blank.

Name
You may reassign a Userid to another person. Please type the first and last names of the new user as: Lastname, Firstname. If you do not want to reassign the Userid, change to a Spare Userid for future use. In the drop down Action: box, select Set Userid to Spare and click submit.

Address, City, Province, Country, Postal Code
If you wish to use the address fields, enter your mailing address in applicable fields.

Phone
If you wish to enter a phone number, please use the format (888)888-8888

After updating any of these fields, click **Submit** and the system will confirm the update.

Listing and Updating all Userids

It is the responsibility of users with Contact or Prime Contact authority to become familiar with the contents of this section, and to provide assistance as required to other BC OnLine users in your organization.

From any Account/Userid Management screen, open the **Action** drop-down selection box near the top of the screen, then click the **List all Userids** option. Enter your BC OnLine *account number* in the Account/Userid field, then click **Submit**.

The Userid Selection List will appear, listing all of the userids in your account. This screen allows the Contact or Prime Contact to revoke or grant access to BC OnLine, reset passwords, and display or update userid information.

In the boxes at the left of the screen, you can key in:

- R (Revoking Userids). See page 12.
- G (Granting a Userid Access). See page 12.
- P (Resetting a Password). See page 13.
- S to Select a userid for display.
- U to Update or reassign a userid.
- X to change a userid to a spare.

The Action column contains input fields so you can enter any of the codes shown above.

The Userid column displays all of the userids in your account.

The Name column displays all of the user names in your account.

The Auth column displays each userid's authority (blank for a normal user, C for Contact, P for Prime Contact).

The EFT column displays C if the user is authorized to sign electronic cheques.

The Status column displays the status of each userid (R for Revoked or G for Granted).

When an update is requested, the change is held in the BC OnLine system until the Userid Update Job runs. This job runs every 10 minutes and does all updates, grants, revokes, and password changes.

Revoking Userids

When someone leaves your organization, the Contact or Prime Contact should revoke their userid so they will have no opportunity to charge searches to your account. In the Userid Selection List:

- Click the **Action** field next to the userid(s) you want to revoke.
- Key in R (for Revoke).
- When you click the **Submit** button, the status in the Pending column will change to **Revoke**.

When the Userid Update Job runs, the userid will no longer have access to BC OnLine. This may take up to 10 minutes.

Tip

If you wish to reassign a userid to a new employee, enter U (for Update) in the Action field and click **Submit**. Change the level of authority in the Auth field and the user's name in the Name field.

Granting a Userid Access

Use this feature when a user has been revoked and wants to have his or her access to BC OnLine resumed. In the Userid Selection List:

- Click the **Action** field next to the userid(s) you want to grant.
- Key in G (for Grant).
- When you click the **Submit** button, the status in the Pending column will change to **Grant**.

When the Userid Update Job runs, the userid will have access to BC OnLine. This may take up to 10 minutes.

Resetting a Password

Use this feature when a user forgets his or her password or when you reassign the userid.

This resets an individual's password to the default password for your account. The default password is stated on the Userid Authorization letter you received from BC OnLine. In the Userid Selection List:

- Click the **Action** field next to the userid whose password you want to reset.
- Key in P (for Password).
- Click **Submit** and the Userid Management screen will appear, displaying the userid you selected.
- In the **Action** drop-down selection box, choose Reset Userid to Default Password.
- Click **Submit** to reset the password. The message **Password Will be Reset** will appear.
- Click the **Return** button in the BC OnLine button bar to return to the Userid Selection List.

It may take up to 10 minutes for the password to reset.

Tip
If you do not know your default password, you need to contact the BC OnLine Help Desk and have your six-digit deposit account number handy. When a user's password is reset to the default, they will need to sign on to BC OnLine using the default password, and then change it to a new password.

Using the Online Change Form

Some account settings (e.g., change bank information, add a new user, change mailing address) require the assistance of BC OnLine administration. You can use the Online Change Form to request these changes.

In the Account Management menu, select the Change Existing Account option to start the "Change Form Wizard". The wizard organizes all your changes, then generates a "change form".

Note

There are many changes that you can make to your account without the assistance of BC OnLine administration. See Managing Your Deposit Account and Userids on page 6.

Online Change Form Welcome Screen

BC OnLine *Application Form*

TIPS

✓ **Tip:** Click the Help Button for online assistance.

✓ Administration Centre: (250) 953-8250 1-800-663-6102

Who Are You?

Jan 24, 2009
03:54:33 PM

Help ?

Proceed ▶

Welcome to BC OnLine

Use the online wizard to fill out and print a change form for your BC OnLine account.

Who are you? *(Please select one of the following)*

◉ Commercial or Professional Customer
  • Private Individuals, Contractors, or Agents
  • Small Business or Large Corporations
  • Government (other than BC Provincial)
    ○ Includes Townships, Cities, Districts, Municipalities, and Federal Government

○ BC Provincial Government Ministry/Employee

Proceed ▶

Tip

You can click the Help button at any time on any screen in the Online Change Form for more information.

Electronic Cheque

When you select Electronic Cheque from the Account Management menu, you will go to the Electronic Cheque screen. This allows pre-approved users to transfer funds from your organization's bank account using an Electronic Funds Transfer (EFT) to your BC OnLine account. There is no charge for this service.

> **Note**
> Some banks and financial institutions will not participate in EFT agreements. Please consult with your financial institution prior to initiating an EFT agreement.

When you issue an electronic cheque, funds are immediately applied to your organization's BC OnLine account. The actual withdrawal from your bank account will take place 24 to 48 hours later. Records of these cheques will appear on your BC OnLine statement and your electronic chequebook (found under EFT Payments) as well as on your regular bank statement.

If your organization's financial system requires it, BC OnLine's Electronic Cheque feature can be set up so that two signatures are required for a cheque.

Completing an electronic cheque is a simple process, very much like writing a paper cheque. First, you fill in the amount of the cheque, then you "sign" it by clicking a button.

After signing the cheque, you can either send it to BC OnLine or void it.

From the Electronic Cheque screen, you can access the following functions:
- Writing and Signing an Electronic Cheque. See page 16.
- Sending an Electronic Cheque. See page 17.
- Voiding an Electronic Cheque. See page 17.
- Unsent Cheques. See page 17.
- Cheques Requiring Two Signatures. See page 17.

Writing and Signing an Electronic Cheque

From the Account Management submenu, click the Electronic Cheque radio button, then click **Submit**. A blank electronic cheque will appear.

Double-click the **$** field to highlight the **0.00** amount. This is where you type the *amount* of the cheque.

Note

The amount that you enter must not be larger than the value shown in the **not to exceed** field.

The optional Memo field lets you add a 15-character comment about the electronic cheque. Whatever you type here will appear in your Chequebook (see EFT Payments on page 17). This feature improves the Electronic Cheque and EFT transfer options by allowing you to instantly monitor your deposits to BC OnLine.

When you are finished, click **Update $ Amount**. The system fills out the rest of the cheque and prompts you to sign it.

To sign the cheque, click the **Sign Cheque** button in the BC OnLine button bar. Your BC OnLine userid and name (your "signature") appears in the lower-right hand corner of the cheque.

At this point, you can either send the cheque to BC OnLine or void the cheque. The following page describes sending and voiding cheques in detail.

Sending an Electronic Cheque

Electronic cheques which have been properly signed must be sent to BC OnLine. Once received by BC OnLine, the electronic cheque is immediately applied to your BC OnLine account.

To send the electronic cheque, click the **Send to BC OnLine** button in the BC OnLine button bar.

Each electronic cheque is created with a unique cheque number. You might want to note this number to keep a record of the electronic cheques you have sent to BC OnLine.

Voiding an Electronic Cheque

If, after signing an electronic cheque, you decide it is incorrect, you can void it. Voiding a cheque has the same effect as tearing up a paper cheque.

Click the **VOID Cheque** button in the BC OnLine button bar.

Unsent Cheques

Cheques that have been written and signed, but not sent or voided, will remain on the system for the rest of the day. If you write and sign a cheque, then exit from the system and sign on again the same day, the cheque will be there as you left it, ready to send or void.

At the end of the day, the system automatically voids any cheques which have been written and signed, but not sent to BC OnLine.

Cheques Requiring Two Signatures

Some organizations require that two people electronically sign all cheques. BC OnLine's electronic cheque system can be set up so two people will be required to sign the cheque before it can be sent to BC OnLine.

When two signatures are required, the first person will log on to BC OnLine with their personal userid to write the cheque and sign it. The second person will also have to log on with their personal userid and sign the cheque as well. Once the second person has signed the cheque, it may be sent to BC OnLine.

You can have BC OnLine designate any number of people with authority to send electronic cheques, but it will always require any two of them to sign before the cheque can be sent to BC OnLine.

EFT Payments

The free EFT Payments service displays information about your BC OnLine electronic cheques or automatic Electronic Funds Transfers (EFTs).

The EFT Payments feature is available to anyone who is authorized to write an electronic cheque on your BC OnLine account, as well as to customers with Contact or Prime Contact authority.

From the Account Management submenu, click the EFT Payments radio button, then click **Submit**. The EFT Payments Selection Criteria screen will appear.

In the Selection Criteria screen, choose a date range by filling in the From and To fields. In the From field, type the *earliest date* you want the report to include. In the To field, type the *last date* you want the report to include.

In the Output field, select either **Display** or **Print**.

Click **Submit** to produce the report.

The report shows the following information:
- Date that the cheque was written.
- Cheque Number (if a cheque and not an automatic EFT).
- Userid of person who signed the cheque.
- Cheque Amount.
- Bank Account from which the funds were drawn.
- Type of Cheque (Electronic Cheque or Automatic EFT).
- Memo (if any).
- Total amount and number of all cheques and EFTs.

EFT Information

The EFT Information feature is available to users with Prime Contact authority in accounts with a current EFT Agreement.

From the Account Management submenu, click the EFT Information radio button, then click Submit. The EFT Agreement screen will appear.

The details for the current EFT Agreement for your account will display. You will see the bank account information as well as the parameters for your EFT Agreement.

If your EFT agreement includes the Electronic Cheque feature, you will be able to view the list of userids that are currently authorized to write an electronic cheque. From the EFT Agreement screen, click View Cheque Approvers.

If you wish to make any change to your EFT Agreement, click the Charge Account link. This lets you use the Online Change Form wizard to request changes to your EFT Agreement. See Using the Online Change Form on page 14.

Product Delivery Options

In the Account Management menu, select Product Delivery Options. The Product Delivery Options screen lists every product that you can order through BC OnLine, and lets you specify where each one should be sent. By default, everything will go to the User Mailbox of the person who placed the order, but you can change any or all of these options so that a product will go to an email address or to your account mailbox.

You can select *one* delivery option for *each* BC OnLine product.

Click **Submit** to update your delivery options.

Items can be delivered to your:

- Firm's Office **Email** Account
  You can set your delivery options so that items go to an office email account.

  > **Warning**
  > If you choose **Email**, the system will send a test message to the email
  > address that you specify. Note that emails can "go missing" due to internet
  > provider problems and other issues beyond BC OnLine's control. Please
  > check that the test email goes to your email account before you rely on this
  > delivery method.

- Firm's BC OnLine **Account Mailbox**
  Your BC OnLine account has a central "Account Mailbox" which anyone in your
  firm can view. If you set your delivery options so that items go here, anyone in
  your firm can see them.

- Personal BC OnLine **User Mailbox**
  Each user in your BC OnLine account has a "User Mailbox" which only they can
  view. This is the default delivery option.

If you choose **User Mailbox** or **Account Mailbox**, the BC OnLine Mailbox button will
turn yellow to alert you when new items arrive.

If you choose an office **Email** account, the BC OnLine Mailbox button will *not* change
colour. Make sure to check your email inbox frequently for new items.

Important
Whichever option you choose, make sure to check regularly for new items.

- If you select Email, you *must* go to your email inbox to view items.
- If you select Account Mailbox, you *must* go to your Account Mailbox to view
  items .
- If you select User Mailbox, you *must* go to your User Mailbox to view items.

For details on using your BC OnLine Mailbox, see the *BC OnLine Mailbox User's Guide*,
available on the BC OnLine web site.

Printing Account Statements

Your organization's regular BC OnLine statements are sent to your User Mailbox only. Users designated as Contacts and Prime Contacts can use the Print Account Statement feature to print statements. There is no charge to use this feature, and you can re-print statements as often as you like.

The system generates daily, weekly, or monthly statements.

When you select Print Account Statement from the Account Management menu, you will go to the Statement Reprint screen. This screen displays an index of the dates when your account statements were generated.

Up to 32 account statement dates will appear in this index.

- If you have a *daily* statement frequency, the index will cover the last 32 business days.
- If you have a *weekly* statement frequency, the index will cover the last 32 weeks.
- If you have a *monthly* statement frequency, the index will cover the last 32 months, but only those statements less than 12 months old will be available for printing.

A NEW icon indicates statements that you have not yet viewed or printed.

Click the check box beside the statements that you want to print. Click **Submit**, and the system will initiate a print request. Items that you request for printing will be sent to your User Mailbox.

Older Statements

Older statements are kept offline and are not available for printing. We recommend that you print your statements regularly and frequently, before they go offline.

Downloading Account Statements

In addition to printing account statements, BC OnLine customers can also download their account statements and import them into an Excel worksheet or an accounting program. The account statement data is stored in Comma Separated Values (CSV) files (plain text files that use commas to separate data).

The following instructions show how to download your statement and import it into an Excel worksheet. If you use software other than Excel for accounting purposes, please refer to that software's documentation for proper import procedures.

These instructions clearly demonstrate one way of downloading an account statement and importing it into a software package. You may discover other methods to achieve the same purpose. You are encouraged to adapt these procedures for your own environment.

Note
If you have a different version of Excel than the one used for this demonstration, the screens you encounter may be slightly different, but the process is the same.

The steps to import your statement into a software package are:
1. Generate the statement as a CSV file.
2. Email the CSV file to yourself.
3. Open the CSV file with your word processor (such as Word).
4. Save the CSV file as a TXT file.
5. Use your software (in this example Excel) to import the TXT file.

Layout of CSV File

The layout and data type of the CSV file is as follows:

Element	Type	Size	Description
Account Number	Number	6	Your BC OnLine account number
Date	Date	10	Date the transaction was executed in the format yyyy/mm/dd.
Userid	Alpha Numeric	8	Userid of the person who executed the transaction.
Fee Code	Alpha Numeric	8	Fee Code for that Transaction
Folio	Alpha Numeric	30	First 15 characters is the Folio. Next 15 characters is the PPR Registration Reference number.
Form Number	Alpha Numeric	8	Form Number assigned by registry staff for an applied charge.
Rate	Currency	10	The unit cost of the transaction
Quantity	Numeric	10	The number of transactions executed
Total Statutory Fee	Currency	10	The total of the Rate times Quantity
Total Taxes	Currency	10	Total taxes paid
Total Amount	Currency	10	Amount deducted from your account for this transaction.
Remarks	Alpha Numeric	50	General information about this transaction.
Stat Tax Code 1	Alpha Numeric	4	Any tax on the Statutory fee. Normally this is blank.
Tax Code 1 Amount	Currency	10	The amount of Tax 1.
Stat Tax Code 2	Alpha Numeric	4	Any tax on the Statutory fee. Normally this is blank.
Tax Code 2 Amount	Currency	10	The amount of Tax 2.
BC OnLine Fee	Currency	10	The BC OnLine fee for this transaction.
Tax on BCOL Fee	Currency	10	The tax on the BC OnLine fee.
Reserved		10	Reserved for future use.

Note
For currency and numeric values, the last character will be a minus symbol (-) for negative values and blank for positive values.

BC OnLine also makes a fee code file available for download. This allows you to match up a description to each of the fee codes in the CSV file. In addition to the fee code table, the file layout shown on this page is also available for download.

The fee code table and file layout can be downloaded from the CSV Selection List (see page 25).

Generate a CSV File

Generating a CSV file is very similar to generating a standard statement formatted for printing. From the BC OnLine main menu, select Account Management and click **Submit** to go to the Account Management menu.

From the Account Management menu, select Download CSV File and click **Submit** to go to the CSV Selection List (shown below).

You can click **CSV File Layout** to view a PDF file explaining the file's layout, or **BC OnLine Fee Codes** to download all of BC OnLine's fee codes.

Select one statement CSV file from the list, then click **Submit**. Within a few minutes, your statement CSV file will be generated and delivered to your User Mailbox.

Open the CSV File

After you generate a CSV file and e-mail it to yourself, the file will appear in your e-mail in-basket as an attachment. The picture below shows an e-mail in basket containing a BC OnLine e-mail with a CSV file attached.
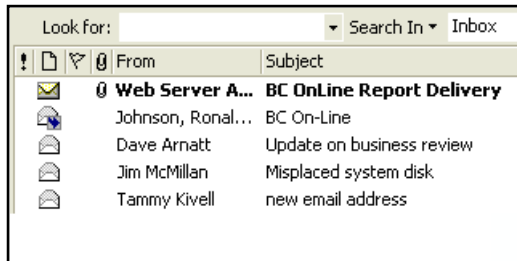
Open the e-mail as you normally would. The picture below shows a BC OnLine e-mail with CSV file attached.
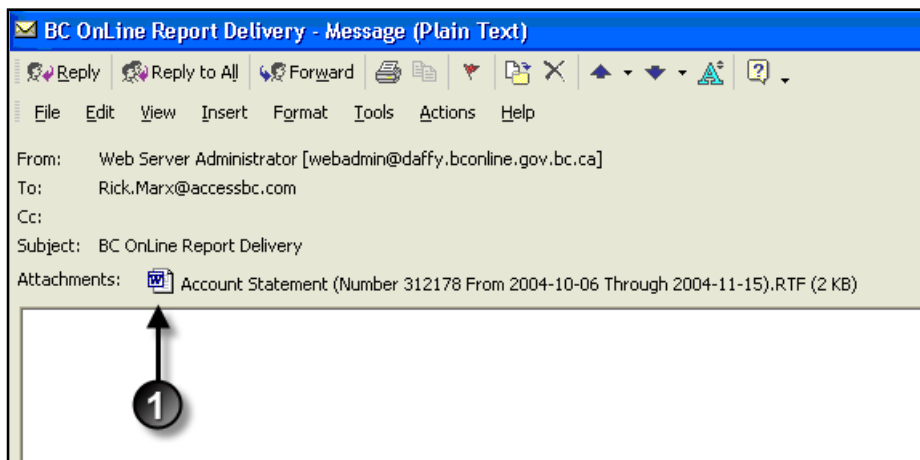

Double-click the attachment icon ❶ to open it. Normally, your word processor (such as Microsoft Word) is set up to open this type of attachment. If it is not, consult with your systems support staff to set up a word processor to open CSV attachments.

The Open Mail Attachment dialogue box will appear.

Do not save this file to disk at this time. Select **Open It** ❶ and click **OK**. The File Conversion dialogue box will appear (shown below).
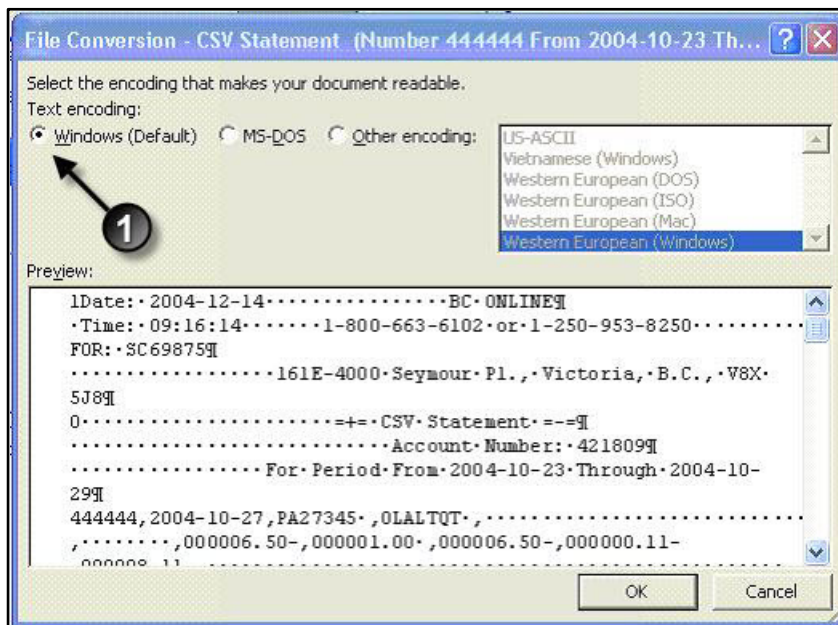
Accept Windows (Default) ❶ as the Text encoding and click **OK**.

The picture below shows a Microsoft Word view of a CSV file.
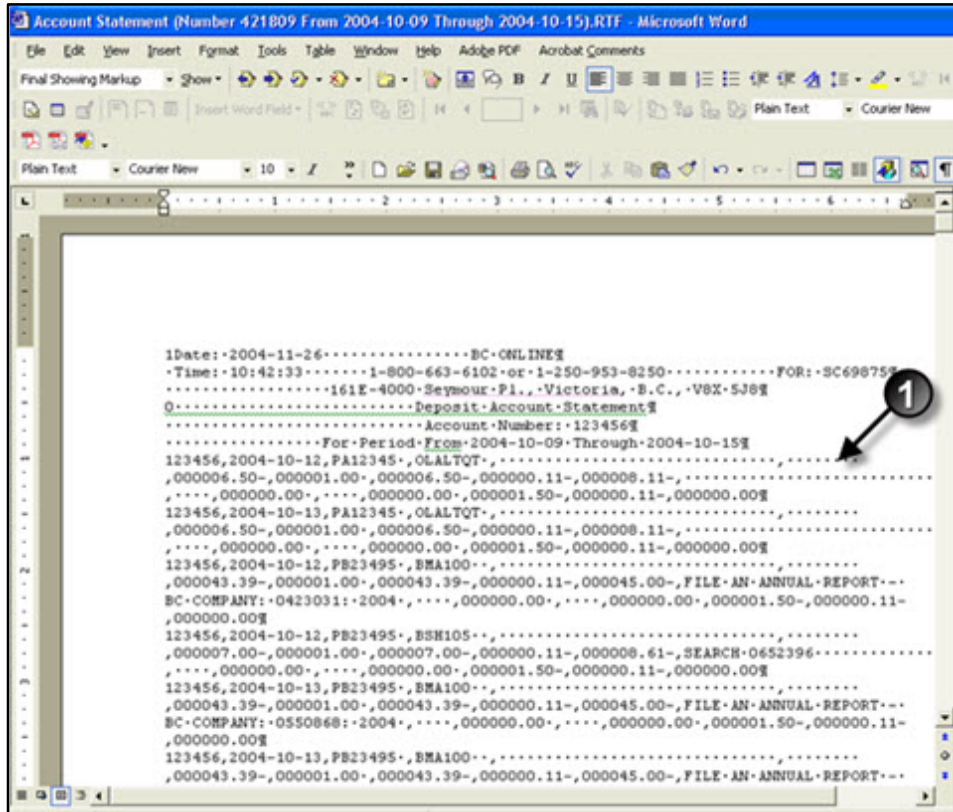
Your CSV file may look different depending on the font and type size that you normally use. If you see the hidden symbols for spaces (dots) and end of paragraph (¶) markers ❶, it means that Word's Show/Hide button is set to ON. This will not affect the data.

Save the CSV as TXT

With the CSV file displayed, use Word to save the file as a TXT file.

In Word's **File** menu, choose **Save As**. The Save As dialogue box will appear.
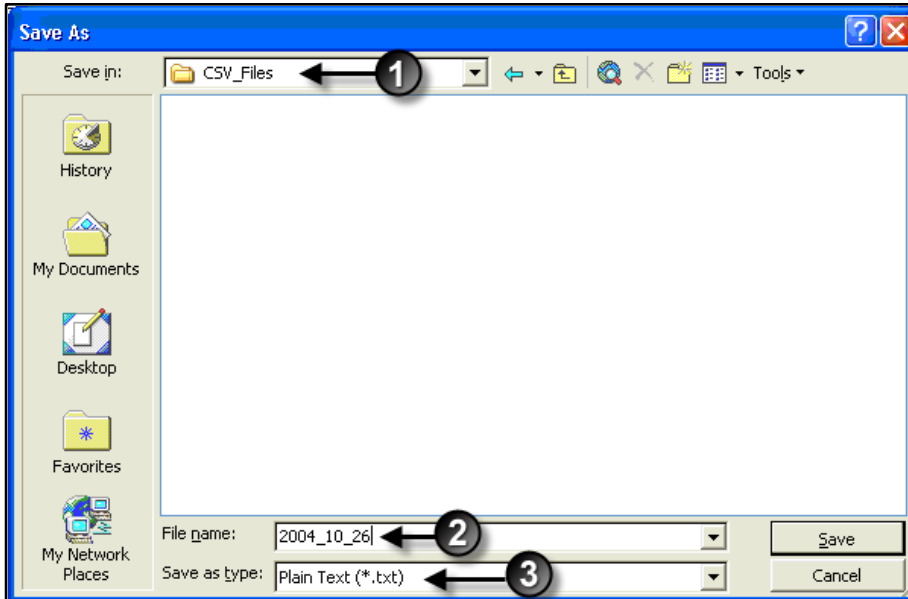
Save the file in an appropriate location ❶ and give it a name ❷ that identifies the information. We recommend the date range the file covers. Select the Plain Text (*.txt) ❸ option in the Save as Type field, and click **Save**. The File Conversion dialogue box will appear.
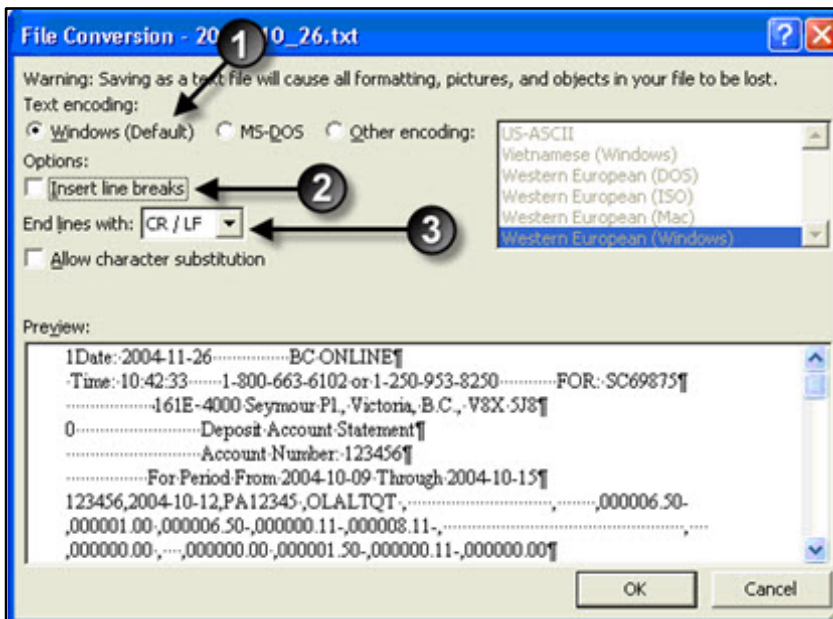
In the File Conversion window, leave "Text encoding" set to "Windows (Default)" ❶. In the Options section, make sure that "Insert line breaks" is *not* selected ❷, and that lines end with CR/LF ❸.
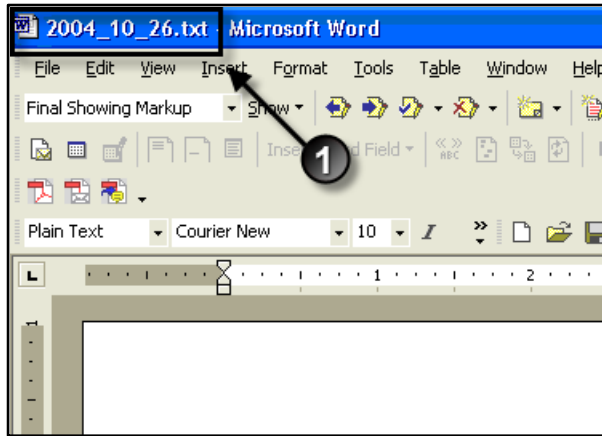
Warning
Inserting line breaks or changing the "End lines with" field will corrupt the data.

Click **OK** to save the file as a TXT file.

The filename ❶ ends with "TXT". Close the TXT file so you can begin the import process.

Import the TXT File

These instructions show how to import the TXT file into an Excel worksheet. To import files to other software, please refer to that software's instructions.

To begin, start Excel. In the File menu, select **Open**. The Microsoft Excel File Open dialogue box will appear.
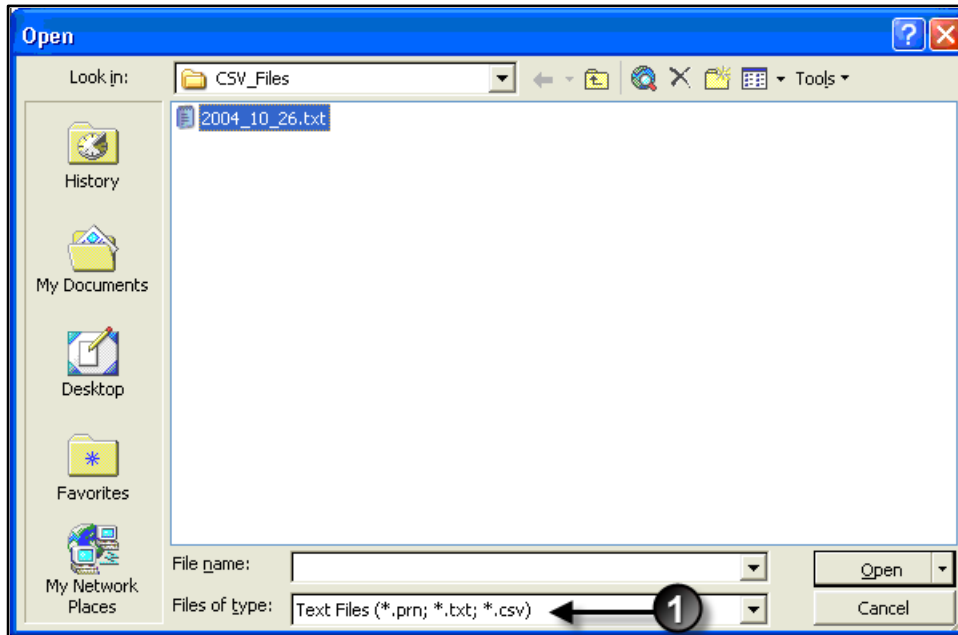

You may have to set "Files of type" to Text Files ❶ to see the file you want to open. Select the TXT file you want to import, then click **Open**. The first of three Text Import Wizard screens will appear.
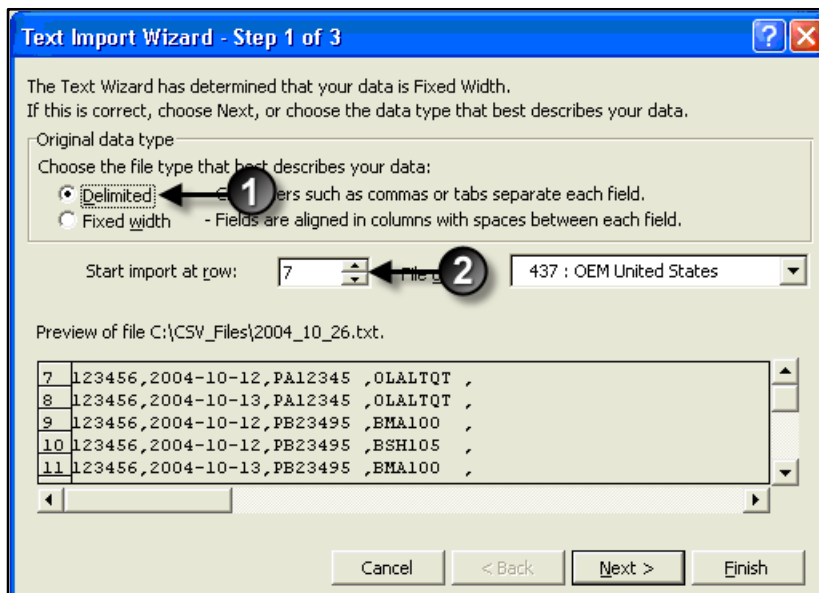

Because these files are both delimited and fixed-width, you will find them easier to import if you select **Delimited** as the original data type ❶. Each file has six lines of header

information that you will probably want to skip. You can set the **Start import at row** field to 7 to skip this header information ❷. Click **Next** when you have set Delimited and Start import at row 7.
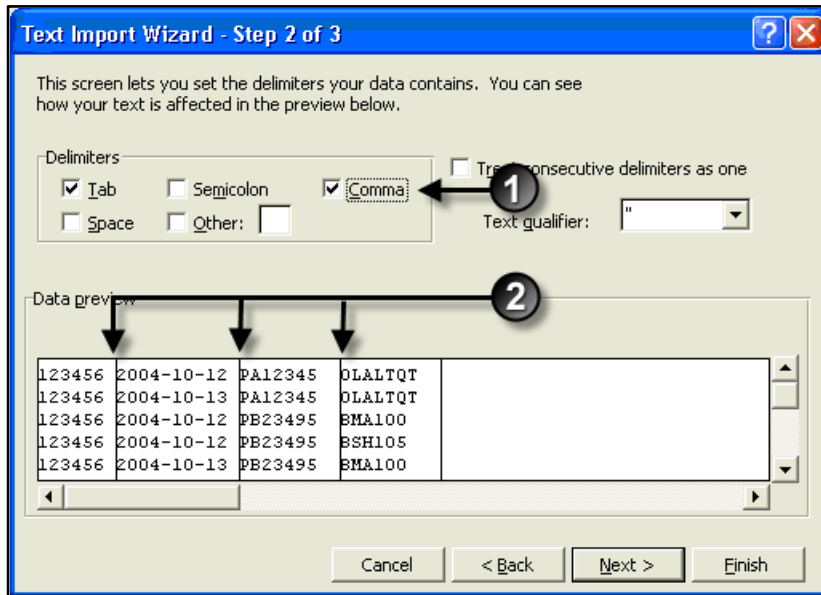

Check the Comma box ❶ as one of the Delimiters. Once you check the Comma box, you will see the vertical separator lines ❷ appear in the Data preview window. Click **Next.**
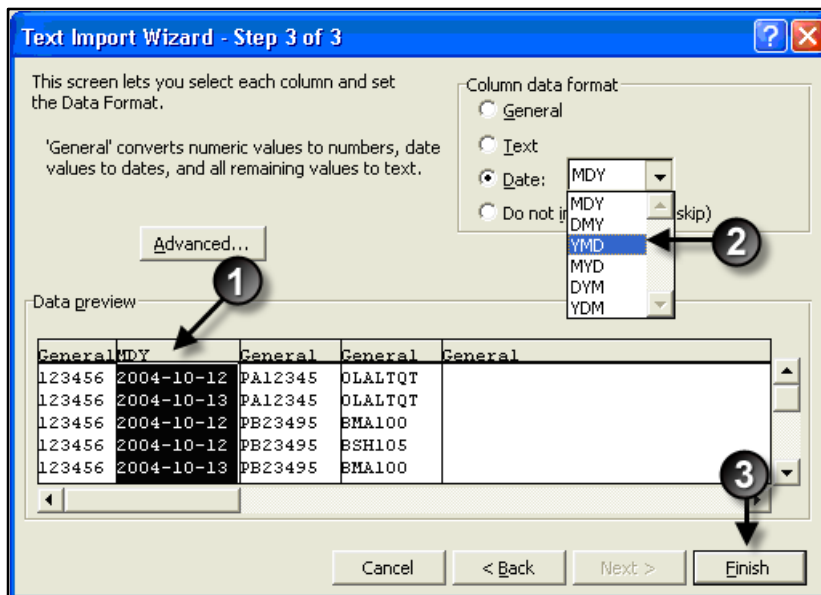
On this screen, only the second field (the Date field) needs to be defined during the import phase. For Excel to properly display the date, it needs to know the format is Year, Month, and then Day (YMD).

Highlight the second column ❶, select "Date" as the Column data format. Select "YMD" from the drop-down list ❷. Click **Finish** ❸. The picture below shows Excel with a text file imported and properly separated into columns.
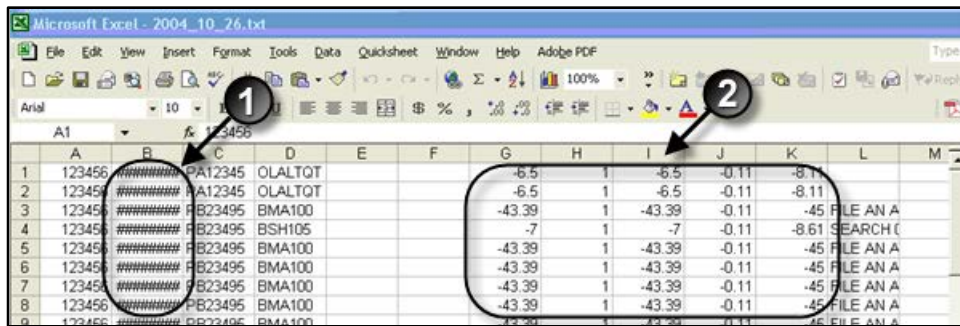
The data will load into Excel. You may need to expand the width of some columns in order to see all the information. Hash marks ❶ indicate that the column width needs to be expanded. You may want to apply proper formatting for currency columns ❷.

Other software packages might not need this explicit instruction, but if you find that the dates are not displayed properly, try modifying the date format to Year, Month, Day.

As a last step you may want to include a row of headers that name each column. For column header information, see Layout of CSV File on page 24.

At this point you can manipulate the file as you would any standard Excel worksheet.

Account Management Trouble Shooting

Error messages are displayed when the computer detects an error or requires you to resolve a problem. System messages are displayed to prompt you to take some action, or to confirm that an action has taken place. The following is a list of error messages and system messages for the Account Management System, with explanations.

ACCOUNT DOES NOT EXIST

(Error) The account number you typed in the Account/Userid field is not your account number. Correct the number and try again.

ACCOUNT INFORMATION RETRIEVED

(System) Your account information has been retrieved and is displayed on your screen.

ACCOUNT UPDATED SUCCESSFULLY

(System) The changes you made to the Account screen have been accepted and changed.

ACCOUNTS DO NOT USE PASSWORDS

(Error) You tried to use Mode P with your account number in the Account/Userid field. You can not reset the password for an account. Either change your key to a userid to reset the password, or change your Mode.

AUTH MUST BE BLANK, "P", OR "C"

(Error) The Auth field on the Account screen can only be blank, P, or C. Any other value will produce this error. Correct the Auth field.

ID NOT FOUND

(Error) The userid you entered in the Account/Userid field does not exist. Correct the key. If the userid is correct and you continue to get this message, contact the BC OnLine Administration Office.

INSUFFICIENT AUTHORITY

(Error) You are attempting to perform an action for which you are not authorized. Your Contact or Prime Contact person should be able to assist you. If not, contact the BC OnLine Administration Office.

INSUFFICIENT AUTHORITY TO GRANT THIS LEVEL

(Error) You are not authorized to change the Auth field for a userid to the level you want. Contact the BC OnLine Administration Office for assistance.

INSUFFICIENT AUTHORITY TO GRANT/REVOKE ENTIRE ACCOUNTS

(Error) You can not use modes G or R against an account. If you want to grant or revoke a userid, change your key to the userid.

INVALID MODE

(Error) The mode you typed in the M field is not valid. Valid modes are C (Cancel), G (Grant), L (List), P (Password), R (Revoke), S (Select), and U (Update). Correct your mode.

INVALID VALUE

(Error) The value you typed in the Warning field of your Account screen is not valid. You must type numbers only and the number must be between 1 and 99999. Correct the entry.

PASSWORD WILL BE RESET

(System) The password reset you issued will be processed when the Userid Update Job runs. This will happen within 10 minutes.

PRINTER XXXXNNNN IS NOT VALID

(Error) The printer node you entered in the Printer Node field of the Account screen is not a valid printer. Correct the printer name, or contact the BC OnLine Administration Office if the printer name is correct.

USER DATA RETRIEVED

(System) The information on the userid you entered in the Account/Userid field is displayed.

USER UPDATED SUCCESSFULLY

(System) The changes you made to the Userid screen have been accepted and changed.

USERID GRANTED SUCCESSFULLY

(System) The Grant command for the userid has been accepted and will be processed the next time the Userid Update Job runs. This will happen within 10 minutes.

USERID PENDING ACTIONS SUCCESSFULLY CANCELLED

(System) Any Grant, Revoke, or Password actions pending against a userid have been cancelled. You should confirm this by viewing the Userid screen.

USERID REVOKED SUCCESSFULLY

(System) The Revoke command for the userid has been accepted and will be processed the next time the Userid Update Job runs. This will happen within 10 minutes.

YOU ARE NOT AUTHORIZED FOR THIS MODE

(Error) You are not authorized to use the mode you typed in the M field. Valid modes for Contact and Prime Contact are C (Cancel), G (Grant), L (List), P (Password), R (Revoke), S (Select), and U (Update). Correct the mode.

YOU ARE REVOKED - YOU CAN ONLY READ CLIENT DATA

(System) Your userid has been revoked. You may view your account to see if your balance has been depleted. When an account balance has been depleted, all userids are automatically revoked. If your account has sufficient funds, consult your organization's Contact or Prime Contact. You may also contact the BC OnLine Administration Office.

YOU CANNOT GRANT OR REVOKE YOURSELF

(Error) If you are a Contact or Prime Contact, you can not grant or revoke your own userid. You must contact the BC OnLine Administration Office to grant or revoke your userid.

Glossary of Terms

Some of the special terms used in the BC OnLine Account Management System are explained here.

Contact

A user to whom the Prime Contact has delegated some special authorization.

Default Password

The original password assigned to your organization. If a password is reset by the Prime Contact, or by BC OnLine, it is reset to this default. The default password is stated on the Userid Authorization letter your organization received from BC OnLine.

Deposit Account

This is your account with BC OnLine from which statutory fees and network usage charges are deducted. Clients who access information from BC OnLine must maintain sufficient funds in their deposit account.

Grant Access

This process allows a userid access to the BC OnLine system and to all services your organization has contracted for.

Pending

Changes to a userid which have been submitted, but have not yet been processed are said to be pending. Changes are pending until the Userid Update Job runs (every 10 minutes).

Prime Contact

The Prime Contact is the one user in an organization who has special powers to manage deposit account and user information. The Prime Contact also has the ability to grant, revoke, and reset the password for other users.

Reset Passwords

If a user forgets his or her password, or if the password has expired after six months, the password must be reset to a known value. The user must change it immediately before signing on.

Revoke Access

This process denies a user access to the BC OnLine system.

Update

The ability to change information on a computer system. BC OnLine users have the ability to update some information about their account and userids.

Userid Update Job

This is a computer batch job which automatically processes accumulated changes to userids. This job runs every 10 minutes.

Users

Individuals, or employees of organizations under contract with BC OnLine, who have access to government registries information.

Verification Word

This is a security word your authorized users can use over the telephone when requesting that services be charged to your BC OnLine account. This is also used to password-protect emailed information sent to you by BC OnLine staff.

Index