

Carolynne R. Maguire



The More Things Change . . .

Pro-Convey, one module in a suite of Web-based products being developed by The Society of Notaries Public of BC under the banner *Pro-Suite*, was introduced in its design phase last year. (Please see my article in the Summer 2003 issue of *The Scrivener*.) Given that Pro-Convey remains on target to “go live” April 2004—already a big month for BC’s conveyancing industry, with the full rollout of e-filing at the Land Title Office—it seemed ripe for an update.

I recently had the pleasure of previewing the product with system architect Michael Haines, a man who clearly knows his stuff. With over 15 years’ experience in the legal industry and as architect of the popular legal software *EasySuite*—later renamed *CarsWare* when acquired by Carswell Publishing, a wholly owned subsidiary of The Thompson Corporation—he has seen what works and what doesn’t.

Haines explains how *Pro-Suite* has been built as a Win32 Internet Client using cutting-edge Microsoft.NET technology on SQL database, resulting in a robust production system running over the

Internet, as opposed to a browser-based application designed for casual uses such as order entry or forms fill-in. Simply put, the less often traffic is required to pass back and forth over the Internet during a session, the faster the overall process.

Logging-in requires an identity provided by The Society and a password created by the user.

The architecture will be relatively familiar to those with networked database programs such as *CarsWare*. While data entry and some of the basic work is performed on the user’s desktop (at the client), data storage and document production take place at the local server with results retrieved by the client for further manipulation.

Now expand this concept geographically by ramping up the server to be capable of simultaneous access by hundreds of users without perceivable slowdown and relocate it to a professional data centre with guaranteed uninterrupted power, security, fire protection, maintenance, security, backup, temperature control, security, and Class 5 (10 Gig) Internet access through two different suppliers. Voilà—*Pro-Suite!*

Did I mention security? The *Pro-Suite* servers are behind state-of-the-art firewall hardware locked down to allow one specific port to receive Internet packets. These client-server data packets are encrypted at 128 bits, which means that hacking into such a system

would be virtually impossible. In short, this system has the same level of security as banks and other security-minded companies.

The key to *Pro-Suite*’s successful transition from local to remote server comes from in-built economies-of-server access. To keep Internet traffic to a minimum during a session, the new system relies on batch processing; conscious rather than automated decisions to send grouped data to the server. Such conservation is relatively intuitive, however, much like learning to recycle; it just takes some getting used to.

The fun begins with a download from The Society’s Website of a small starter module that checks the user’s system for compatibility. Any shortcomings are identified and those easily remedied will trigger subsequent downloads from Microsoft. Significant incompatibility, however, may require user investment. (The Society Website has a listing of system requirements.) Logging-in requires an identity provided by The Society and a password created by the user. The client software automatically updates from the server and the session is underway—for any authorized user, anywhere in the world, 24/7.

Fundamentally, user sessions will not be unlike those for many existing conveyancing programs. Document files, once generated at the server in either .rtf or .pdf formats, will be retrieved by the client and opened on the user’s desktop in the appropriate application, for the most part MS Word and Adobe Acrobat. To further ease the transition, The Society will assist members to import their years’ worth of

existing *CarsWare* records into the *Pro-Suite* database. Where analysis of the system does get interesting is in its management of the wealth of information maintained in the database resident on The Society's servers.

Data may be classified into one of three access classifications.

- 1 **Global:** available to all authorized users of the system. Will automatically apply to templates and data provided by The Society and to data that users classify as "Global."
- 2 **Local:** only members of the submitting firm can retrieve these customized templates and data.
- 3 **Private:** only the individual author of the data may access it.

The Society, as database administrator, technically has universal access to all records but has self-imposed a privacy policy to assure the public that client information is at least as safe as it would be in a Notary's or lawyer's office. General statistical information may be gathered for use in product improvement, trend analysis, or for other possible interests of The Society's governance.

In discussion last summer with G. Wayne Braid, Secretary/Executive Director of The Society, it was expected that transaction records and/or client-specific data would be available for download from The Society servers to the practitioner's local computer, potentially with the further option of record deletion from The Society servers.

By allowing for decentralization and disseminating client-specific data back to the originating practitioners, The Society's servers will, at any point, mostly contain information already of public record, thus reinforcing The Society's ongoing commitment to ensuring security and privacy.

While none of this functionality has yet been incorporated into the product, it is on the agenda to be addressed in the next few months. Additional demand from the membership and/or public may be required to accelerate this phase of development.

Pro-Suite's development timeline continues to be aggressive, with priority given to integration with BC OnLine search functions, followed by e-filing

document submission. Future modules include trust accounting, multi-unit projects, and direct connectivity with title agents and title insurance providers.

While The Society strongly encourages membership participation in the program, use of *Pro-Suite* is optional. Interested members will pay a small one-time software licence fee to cover training plus costs associated with technical support. In addition, members' ongoing feedback will be requested to shape the product's evolution. In return, smaller firms will have access to large-firm technology and, to some degree, will have outsourced their IT and data storage concerns to The Society. Notaries are embracing change and will have many new solutions from which to choose this Spring! ▲

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