



# **Online Submission Tool: Packet Management**

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## Revision History

Version #	Revision Date	Summary of Changes	Pages Changed

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## **Overview**

This module will provide you with information to manage packets including the ability to edit, delete, view, copy, correct, print, submit, and search for packets in the Online Submission Tool.

### ***Objectives***

As a result of this module you will:

- Understand the status of packets.
- Understand the two types of packet lists.
- Be able to search for packets.
- Be able to use the Packet Content List to open a packet for modification and/or submission.
- Be able to re-sequence Transactions within a packet.
- Be able to create and print reports.
- Be able to copy a draft packet.
- Be able to correct a rejected packet.
- Be able to delete packets.
- Understand packet expiry.

## **What Is Packet Management?**

A packet is one or more application submitted in a particular order for registration. Within the Online Submission tool, the Packet Management Tab provides a method for users to retrieve, view, modify, copy, delete, or submit packets that are in “Draft” status. You also have the ability to correct Rejected packets. Packets are displayed in “Packet Lists.” You have the ability to view these lists and check the status of a packet.

## Reference

### *Packet Status*

Every packet in the Online Submission tool has a status. The status indicates the packet's current step in the process. The packet status results display as one of the following:

- Draft - The packet has been created and work is in progress. The packet has not been submitted.
- Being Validated - The packet is in the process of being validated off-line behind the scenes.
- Pending Submit - The packet has been submitted for examination and is in the process of being validated by the OLS system.
- Being Processed - The packet has been successfully validated by the OLS system and placed in the ISC queue to be examined by a Title Processor.
- Registered - The packet has been examined by a Title Processor and successfully registered.
- Rejected - The packet has been examined by a Title Processor and rejected.

### *Packet Lists*

The system provides two options to view listings of your packets. These are the **All Packets** and **Draft Packets** lists. The Draft list is the default view that is presented when the Packet Management tab is clicked. A different view can be selected by clicking the appropriate link available directly beneath the Packet Management tab.

The header bar of both packet lists also provides a count of the number of packets in the view and the actions that can be performed on the packets.

## All Packets List

Information Services Corporation OLS | Online Submission Tool

OLS Home | Packet Mgmt | Transfers | Interests | Transform

View Packet List: All Packets | Draft Packets | My OLS Documents

**All Packets**

Search for Packets by: Packet No.  Client Ref. No.  Search [Advanced Search](#)

All Packets 3 Packet(s) Found View Packet Content Delete Copy Correct Print List

Select All

Packet No.	Reference No.	Description	Packet Type	Submitted	Status	Reason for Rejection
<input type="checkbox"/> 200080437			Title Processing		Draft	
<input type="checkbox"/> 200080448			Title Processing		Draft	
<input type="checkbox"/> 200080459			Title Processing		Draft	

The all packets view provides a listing of all your packets. The all packets view provides the following information:

- Packet No. - This is the packet number generated for this packet.
- Reference No. - This is the reference number entered in the packet header when a new packet is created.
- Description - This is the description entered in the packet header when a packet is created.
- Packet Type - The OLS tool currently only handles “Title Processing” packet types.
- Submitted - This is the date and time the packet was submitted.
- Status - This is the current status of the packet.
- Reason for Rejection - If the packet has been rejected, a link to more details is provided here. Click on the link to see the details for why the packet was rejected.

**Note:** If the listing contains more than a full screen you will have to use the scroll bar and scroll down to see all the packets in the list.

## Draft Packet List

**Draft Packets**

Search for Packets by: Packet No.  Client Ref. No.   [Advanced Search](#)

**Draft Packets** 3 Packet(s) Found

<input type="checkbox"/>	Packet No.	Reference No.	Description	Packet Type	Created On	Last Modified	Expiry Date <sup>?</sup>
<input type="checkbox"/>	200080459			Title Processing	16-Aug-2012	16-Aug-2012	15-Feb-2013
<input type="checkbox"/>	200080448			Title Processing	16-Aug-2012	16-Aug-2012	15-Feb-2013
<input type="checkbox"/>	200080437			Title Processing	16-Aug-2012	16-Aug-2012	15-Feb-2013

The draft packets view provides a listing of your packets with a “Draft” status. This view provides a list of packets that are being worked on and are currently in progress but not yet submitted. The draft packets view provides the following information:

- Packet No. - This is the packet number generated for this packet.
- Reference No. - This is the reference number entered in the packet header when a new packet is created.
- Description - This is the description entered in the packet header when a packet is created.
- Packet Type - The OLS tool currently only handles “Title Processing” packet types.
- Created On - This is the date and time the packet was created.
- Last Modified - This is the date and time the packet was last saved.
- Expiry Date - This is the date and time the packet will expire and be deleted from the system. This will be described in detail later in this Module.

**Note:** If the listing contains more than a full screen you will have to use the scroll bar and scroll down to see all the packets in the list.

### My OLS Documents

The **My OLS Documents** link takes you to the storage area for authorization & attachment documents. See the **Common Elements** module for details.

## Sorting Packet Lists

The screenshot shows the OLS Online Submission Tool interface. At the top, there is a navigation bar with the ITC logo and the text "Information Services Corporation OLS | Online Submission Tool". Below this are several tabs: "OLS Home", "Packet Mgmt", "Transfers", "Interests", and "Transforms". A sub-navigation bar includes "View Packet List" and "All Packets | Draft Packets | My OLS Documents".

The main content area is titled "All Packets" and features a search section with "Search for Packets by: Packet No." and "Client Ref. No." fields, a "Search" button, and a link to "Advanced Search". Below the search section, it indicates "All Packets 3 Packet(s) Found" and provides buttons for "View Packet Content", "Delete", "Copy", "Correct", and "Print List". A "Select All" button is also present.

	Packet No.	Reference No.	Description	Packet Type	Submitted	Status	Reason for Rejection
<input type="checkbox"/>	200080437			Title Processing		Draft	
<input type="checkbox"/>	200080448			Title Processing		Draft	
<input type="checkbox"/>	200080459			Title Processing		Draft	

Clicking on any column heading in a packet list will sort the list by that criterion. When a column heading has been selected, it is greyed out to indicate the currently selected sort criterion.

**Note:** The default sort order for the all packets view is the “Submitted” date and time with most recent first. The default sort order for the draft packets view is the “Last Modified” date and time with most recent first.

## ***Packet Lists Functions***

The packet header bar provides a number of functions that can be performed on a packet:

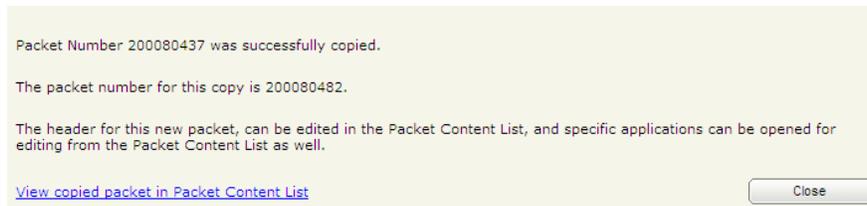
- The **View Packet Content** list function gives you a summary of a “Draft” packet's content. It also provides the ability to open the packet for editing, re-sequencing the transactions within a packet, linking authorization and attachment documents to the transactions in the packet, creating a packet summary report, requesting title prints, and submitting the packet.
- The **Delete** function allows you to delete one or more “Draft,” “Registered” or “Rejected” packets.
- The **Copy** function allows you to copy a “Draft” packets.
- The **Correct** function (which only appears on the all packets list) allows you to create a copy of a “Rejected” packet with a new packet number so you that you may correct the errors and re-submit the packet.
- The **Print List** function allows you print a copy of the packet listing. When you click this button, the system presents the standard **Print Dialog** box to select the desired printer and set any required printer properties.

## ***Copy Packet***

The screenshot shows the OLS Online Submission Tool interface. At the top, there is a navigation bar with tabs for OLS Home, Packet Mgmt, Transfers, Interests, and Transforms. Below this is a search area with fields for Packet No. and Client Ref. No., and buttons for Search and Advanced Search. A table titled "All Packets" displays 3 packets found. The table has columns for Packet No., Reference No., Description, Packet Type, Submitted, Status, and Reason for Rejection. The packets listed are:

Packet No.	Reference No.	Description	Packet Type	Submitted	Status	Reason for Rejection
<input type="checkbox"/> 200080437			Title Processing		Draft	
<input type="checkbox"/> 200080448			Title Processing		Draft	
<input type="checkbox"/> 200080459			Title Processing		Draft	

1. From the all packets or draft packets list, click the check box to the left of the packet you wish to copy.
2. Click **Copy**. The system will display the “Copy Packet – Web Page Dialog” illustrated below. The first line displayed in the dialog box is the packet number of the original packet. The second line displays the packet number of the new packet. The last line is a link that can be clicked to open the new packet in the packet content list.



**Note:** If the copy process is successful, a confirmation message is displayed indicating that a new draft packet has been created and the new packet number is provided. The copied packet will be displayed in the all packets and draft packets lists. If the copy process was not successfully completed, an error message is displayed.

3. Click **Close** if you do not want to view the copied packet at this time.

**Note:** When you open a copy of a “Registered” packet, some of the information will not be displayed. This is because the Titles and Interests referenced in the packet change when the original packet is registered and Titles and Interest numbers may no longer exist.

**Note:** The copied packet will also include any authorization and/or attachment documents that are referenced in a transaction.

## Correct Packet

This function allows you to make corrections to a copy of a “Rejected” packet.

**Note:** The new packet will also include any authorization and/or attachment documents that are referenced in a transaction.

The screenshot shows the OLS Online Submission Tool interface. At the top, there is a navigation bar with links for Home, Authorizations, Affidavits, Legal, Help, and Sign Out. Below this is a menu with options like OLS Home, Packet Mgmt, Transfers, Interests, and Transforms. The main area is titled 'All Packets' and includes search filters for Packet No. and Client Ref. No., along with buttons for Search and Advanced Search. A summary bar indicates 'All Packets' and '3 Packet(s) Found', with buttons for View Packet Content, Delete, Copy, Correct, and Print List. Below this is a table with columns for Packet No., Reference No., Description, Packet Type, Submitted, Status, and Reason for Rejection. The table contains three rows of data, all with a Status of 'Draft'.

Packet No.	Reference No.	Description	Packet Type	Submitted	Status	Reason for Rejection
<input type="checkbox"/> 200080437			Title Processing		Draft	
<input type="checkbox"/> 200080448			Title Processing		Draft	
<input type="checkbox"/> 200080459			Title Processing		Draft	

1. From the “All Packets” list, click the check box to the left of the “Rejected” Packet you wish to correct.
2. Click **Correct**. The system will display the “Copy Packet – Web Page Dialog” illustrated below. The first line displayed in the dialog box is the packet number of the original packet. The second line displays the packet number of the new packet. The last line is a link that can be clicked to open the new packet in the packet content list.

The screenshot shows a confirmation dialog box with a light green background. It contains the following text: 'Packet Number 200080437 was successfully copied.', 'The packet number for this copy is 200080482.', and 'The header for this new packet, can be edited in the Packet Content List, and specific applications can be opened for editing from the Packet Content List as well.' At the bottom, there is a blue link that says 'View copied packet in Packet Content List' and a 'Close' button.

**Note:** If the copy process is successful, a confirmation message is displayed indicating that a new draft packet has been created and the new packet number is provided. The copied packet will be displayed in the all packets and draft packets lists. If the copy process was not successfully completed, an error message is displayed.

3. Click **Close** if you do not want to view the copied packet at this time.

**Note:** The new packet will also include any authorization and/or attachment documents that are referenced in a transaction.

### ***Search for Packets***

The OLS system provides a number of features to assist you in finding your packets. Rather than scrolling through the list to find a packet, the search function may provide a quicker way to locate the desired packet.

The search area is located directly above the packet list header bar. The system provides a “Basic Search” and an “Advanced Search.” The right side of the search area includes a link that can be clicked to toggle between the two search types. The search area is illustrated below.

### **Basic Packet Search**

The Basic Search allows the user to search by Packet Number or Client Reference Number.

The screenshot shows the OLS Online Submission Tool interface. At the top, there is a navigation bar with links for 'ISC Home', 'Authorizations', 'Affidavits', 'Legal', 'Help', and 'Sign Out'. Below this is a header for 'OLS | Online Submission Tool' with sub-headers for 'OLS Home', 'Packet Mgmt', 'Transfers', 'Interests', and 'Transforms'. A search bar is present with fields for 'Packet No.' and 'Client Ref. No.', and a 'Search' button. Below the search bar, it indicates 'All Packets' and '6 Packet(s) Found'. A table of search results is displayed with columns for Packet No., Reference No., Description, Packet Type, Submitted, Status, and Reason for Rejection. The table contains 6 rows of data, all with 'Draft' status and 'Title Processing' as the packet type.

Packet No.	Reference No.	Description	Packet Type	Submitted	Status	Reason for Rejection
<input type="checkbox"/> 200080437			Title Processing		Draft	
<input type="checkbox"/> 200080448			Title Processing		Draft	
<input type="checkbox"/> 200080459			Title Processing		Draft	
<input type="checkbox"/> 200080460			Title Processing		Draft	
<input type="checkbox"/> 200080471			Title Processing		Draft	
<input type="checkbox"/> 200080482			Title Processing		Draft	

1. Input a packet number into the "Packet Number" field or Input a client reference number into the **Client Reference Number** field.
2. Click **Search**.

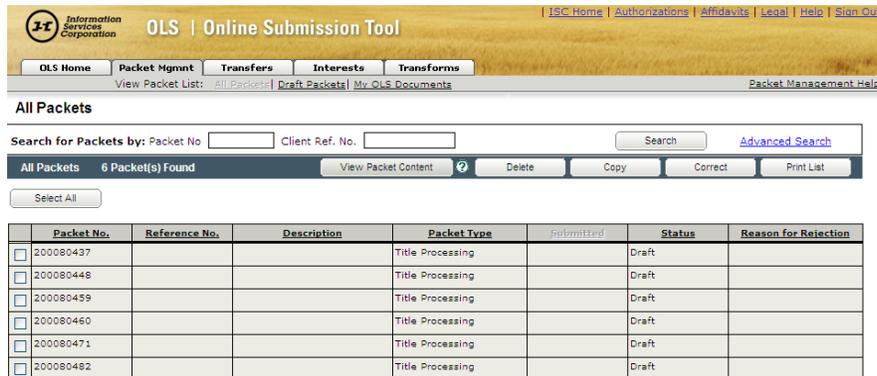


- The results are illustrated in the **Packet Search Results List** with a count of the number of Packets found.

**Note:** The basic packet search can be performed from either the All Packets screen or the Draft Packets screen.

### Advanced Packet Search

The Advanced Search allows the user to search by “Packet Description” and/or “Date Range” (creation date, modified date, or submit date). The fields may be combined to help narrow down the search results.



- Click the **Advanced Search** link to activate the new search fields.

The screenshot shows the 'All Packets' search interface. At the top, there are navigation tabs: OLS Home, Packet Mgmt, Transfers, Interests, and Transforms. Below these are links for 'View Packet List' (All Packets, Draft Packets, My OLS Documents) and 'Packet Management Help'. The search area includes fields for 'Packet No.', 'Client Ref. No.', and a 'Search' button. A 'Description' field is also present. The 'Date Range' section has a dropdown menu set to 'Packet Create Date' and two date input fields labeled 'From Date' and 'To Date', both with '(DD-MMM-YYYY)' format guides. Below the search area, a summary bar indicates 'All Packets 6 Packet(s) Found' and includes buttons for 'View Packet Content', 'Delete', 'Copy', 'Correct', and 'Print List'. A 'Select All' button is also visible. The results table below has the following data:

Packet No.	Reference No.	Description	Packet Type	Submitted	Status	Reason for Rejection
<input type="checkbox"/> 200080437			Title Processing		Draft	
<input type="checkbox"/> 200080448			Title Processing		Draft	
<input type="checkbox"/> 200080459			Title Processing		Draft	
<input type="checkbox"/> 200080460			Title Processing		Draft	
<input type="checkbox"/> 200080471			Title Processing		Draft	
<input type="checkbox"/> 200080482			Title Processing		Draft	

2. Enter a packet description into the **Packet Description** field or enter a date range based on the **Packet Creation Date**, **Packet Modified Date**, or **Packet Submitted Date** by selecting the appropriate search option from the Date Range drop down box.
3. Click **Search**. The results are illustrated in the **Packet Search Results List** with a count of the number of packets found.

## ***View Packet Contents***

The **Packet Content List** is only available for “Draft” packets and provides you with a listing of all the transactions (broken out as applications) that comprise a specific packet. This view allows you to review all the applications created for a packet and also provides the opportunity to:

- Print the Packet Header and Application List
- Edit the Packet Header
- Add a Transaction to the Packet
- Edit an Application within a Packet
- Remove Applications
- Request Title Prints
- Manage Authorizations and Attachments
- Submit the Packet
- Print a detailed Summary Report
- Re-sequence the Transactions
- Open or Delete individual Applications

The screenshot shows the OLS Online Submission Tool interface. At the top, there is a navigation bar with the Information Services Corporation logo and the text 'OLS | Online Submission Tool'. Below this are several tabs: 'OLS Home', 'Packet Mgmt', 'Transfers', 'Interests', and 'Transforms'. A search bar is present with 'Search for Packets by: Packet No.' and 'Client Ref. No.' fields, and a 'Search' button. Below the search bar, there is a 'View Packet List:' section with links for 'All Packets', 'Draft Packets', and 'My OLS Documents'. A 'Packet Management Help' link is also visible. The main content area is titled 'All Packets' and contains a table with the following data:

Packet No.	Reference No.	Description	Packet Type	Submitted	Status	Reason for Rejection
<input type="checkbox"/> 200088446			Title Processing		Draft	
<input checked="" type="checkbox"/> 200088457			Title Processing		Draft	
<input type="checkbox"/> 200088514			Title Processing		Draft	

1. Click the check box next to the packet you would like to view.
2. Click **View Packet Content**. The system displays the **Packet Content List**.

Packet Content Edit Header Submit Packet

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**Packet Header Info**

<b>Packet Information</b> Submitting Party: Train50 Client No: 400031930 Client Ref. No: Packet Description: Status: Draft	10 Research Dr, Regina, Saskatchewan, Canada Packet Type: Title Processing Packet No: 200088457 Expiry Date: 10-Apr-2013	<b>Account Information</b> Account Number: <input type="text" value="000001082"/>
-------------------------------------------------------------------------------------------------------------------------------------------	-----------------------------------------------------------------------------------------------------------------------------------	--------------------------------------------------------------------------------------

Add:  Transform  Interest  Transfer Add Resequence ?

---

**Title Transfer** Application Group #1 Hide this section

Applications Open Delete

App #	Application Type	Holder/Owner	Ref. Land Description	Parcel Class Code	Authorizations
<input type="radio"/> 1	Surrender	Willis, Demi	NE 20 21 12 3 Ext 0 As described on Certificate of Title 52NP55544.	Mineral	1
<input type="radio"/> 2	Setup	Train50	NE 20 21 12 3 Ext 0 As described on Certificate of Title 52NP55544.	Mineral	

The **Packet Content List** displays the packet header information and the transactions and associated applications in the packet.

**Note:** For interest discharges and interest registrations, an application and transaction are the same thing.

**Note:** For transfers and transforms, the surrender and each setup are individual applications. This group of applications makes up the transaction.

The transaction and application details presented in the **Packet Content List** are different for each individual application type. The information for each application type is as follows:

- Transfers - Application Sequence Number, Application Type, Owner Name, Reference Land Description, Parcel Class Code, and a count of the number of Authorization and/or Attachment documents associated with that Transaction.
- Interest Discharges- Application Sequence Number, Interest Register Number or Previous Application Sequence Number, Holder/Owner Name, Discharge Type, and a count of the number of Authorization and/or Attachment documents associated with that Transaction.
- Interest Registration (Setup) - Application Sequence Number, Interest Type, Attached To, Holder Name, and a count of the number of

Authorization and/or Attachment documents associated with that Transaction.

- Transforms - Application Sequence Number, Application Type, TAC Number, Holder Name, Reference Land Description, Parcel Class Code, and a count of the number of Authorization and/or Attachment documents associated with that Transaction.

**Note:** If the plus (+) icon appears in the holder/owner column, it indicates that there are multiple holders/owners. Only the first holder/owner is displayed.

## Packet Reports

The OLS system provides a number of options to produce reports that can be printed, and in some cases saved to your PC.

The **Print Header Bar** is located near the top of the **Packet Content List**. The section is open by default when you select to view the content of a packet and allows you to perform the following:

- **Header Print** - Allows you to print the Packet Header Information
- **Header and Application List Print** - Allows you to print the Packet Header Information and the list of Transactions/Applications.

**Note:** It is important to ensure that your browser print settings are set to “Print background colors and images.” If these settings are not selected, portions of the screen will not print correctly. To locate this setting in the Internet Explorer browser, select the **Internet Options** item under the **Tools** menu. When the Internet Options screen appears, Click the **Advanced** tab and scroll down to the Printing item. Click the “Print background colors and images” check box, and then click **OK**.

## Header Print

The screenshot shows a web interface for printing reports. At the top, there's a 'Print' header with a 'Hide this section' button. Below it are two links: 'Header Print' and 'Header & Application List Print'. The main area is titled 'Packet Report' and contains a dropdown menu for 'Select all Applications', an 'Include' section with checkboxes for 'Authorization(s)' and 'Attachment(s)', and 'Add' and 'Remove' buttons. Below this is a table with columns 'Application Type', 'Description', 'Print Authorization', and 'Print Attachment'. At the bottom right, there is a 'Create Summary Report' button.

1. Click the **Header Print** link. The report opens in a new window.

Remember to Print as Landscape and make sure "Print background colors and images" is enabled for your browser.

**Packet Header**

**Packet Header Info**

<b>Packet Information</b> Submitting Party: Train50 Client No: 400031930 Client Ref. No: Packet Description: Status: Draft	10 Research Dr, Regina, Saskatchewan, Canada Packet Type: Title Processing Packet No: 200088457 Expiry Date: 10-Apr-2013	<b>Account Information</b> Account Number: 500001082
-------------------------------------------------------------------------------------------------------------------------------------------	-----------------------------------------------------------------------------------------------------------------------------------	---------------------------------------------------------

[Print](#)

2. Click **Print**.

**Note:** You will need to ensure that your print settings are set to "Landscape" mode or the report will not print properly.

## Header and Application List Print

**Print** Hide this section

[Header Print](#) ?

[Header & Application List Print](#) ?

Packet Report ?

Select all Applications  Include  Authorization(s)  
 Attachment(s)

[Add](#) [Remove](#)

Application Type	Description	Print Authorization	Print Attachment
------------------	-------------	---------------------	------------------

[Create Summary Report](#) ?

1. Click on the **Header & Application List Print** link.  
The report opens in a new window.

Remember to Print as Landscape and make sure "Print background colors and images" is enabled for your browser.

Packet Header

**Packet Header Info**

<p><b>Packet Information</b>                  Submitting Party: Train50      10 Research Dr, egina, Saskatchewan, Canada                  Client No: 400031930      Packet Type: Title Processing                  Client Ref. No:      Packet No: 200088457                  Packet Description:                  Status: Draft      Expiry Date: 10-Apr-2013</p>	<p><b>Account Information</b>                  Account Number: 500001082</p>
----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	----------------------------------------------------------------------------------

Application List

Title Transfer      Transaction Number 1      Hide this section

App #	Application Type	Holder/Owner	Ref. Land Description	Parcel Class Code	Authorizations
1	Surrender	Willis, Demi	NE 20 21 12 3 Ext 0 As described on Certificate of Title 52NP55544.	Mineral	1
2	Setup	Train50	NE 20 21 12 3 Ext 0 As described on Certificate of Title 52NP55544.	Mineral	

Print

2. Click **Print**.

**Note:** You will need to ensure that your print settings are set to "Landscape" mode or the report will not print properly.

**Packet Report (Summary Report)**

This option will allow you to generate a comprehensive packet report. The resulting report is a PDF file that can be printed or saved to your PC.

This option allows you to select the applications in the packet that should be included in the report. You may also specify if the authorization and/or attachments documents should be included on an application by application basis.

Print      Hide this section

Header Print

Header & Application List Print

Packet Report

Select all Applications

Application Group #1 - Title Transfer - Application #1 - Title Surrender  
 Application Group #1 - Title Transfer - Application #2 - Transfer Title Setup  
 Select all Applications

Include  Authorization(s)  Attachment(s)

Add Remove

Application Type	Description	Print Authorization	Print Attachment
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Create Summary Report

1. Select the applications from the **drop down** box.

**Note:** If you choose “Select all Applications,” the list will include all applications in the packet.

2. Click the check boxes to include the attachments and authorizations if required.
3. Click **Add**. The system adds the selected items to the list.

**Note:** As items appear in the list, the **Remove** button is enabled. If you wish to remove items from the list, click the check box to the left of the item and then click **Remove**.

4. Click **Create Summary Report**. An informational message will appear advising you the report has been queued. The report will be created behind the scenes. When it is ready you will be notified in the **OLS Notification** area on the Home page.



Print

Header Print

Header & Application List Print

Packet Report

Select all Applications

Include  Authorization(s)  
 Attachment(s)

Add Remove

Application Type	Description	Print Authorization	Print Attachment
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Create Summary Report

Informational:

- Packet print request has been successfully queued at 5/6/2008 12:03:45 PM. Please check the OLS notifications area on the OLS homepage to view details.

**Note:** The summary report generated when you click **Create Summary Report** will be for the current application only. To create a summary report for the entire packet, ensure that you create the report from the Packet Content List.

**Note:** The OLS Notification will include a link to the report. View the Notification Details and click the report link. The system will open a dialog box with options to **Save** or **Open** the report. Select an option. If you select **Open**, the report will open in a new window. From this point you may **Save** or **Print** the report.

## Edit Packet Header

The screenshot shows the 'Edit Packet Header' screen. At the top, there are buttons for 'Edit Header' and 'Submit Packet'. Below is the 'Packet Header Info' section, which is divided into two columns: 'Packet Information' and 'Account Information'. The 'Packet Information' column contains fields for 'Submitting Party: Train50', 'Client No: 400031930', 'Client Ref. No:', 'Packet Description: Status: Draft', '10 Research Dr, Regina, Saskatchewan, Canada', 'Packet Type: Title Processing', and 'Packet No: 200088457'. The 'Account Information' column contains 'Account Number: 300001082'. At the bottom, there are radio buttons for 'Transform', 'Interest', and 'Transfer', followed by an 'Add' button and a 'Resequence' button with a help icon.

1. Click **Edit Header** on the **Packet Content List** screen. A number of the fields in the **Packet Header Info** area will change so you can edit the information.

This screenshot shows the 'Edit Packet Header' screen with the 'Packet Header Info' section expanded into a form. The 'Packet Information' section includes 'Submitting Party: Train50', 'Client No: 400031930' (with a 'Find' link), 'Client Ref. No:', 'Packet Description:' (with a text area), '10 Research Dr, Regina, Saskatchewan, Canada', 'Packet Type: Title Processing' (with a dropdown arrow), and 'Packet No: 200088457'. The 'Account Information' section includes 'Account Number: 300001082' and 'New Account Password: \*\*\*\*\*'. At the bottom, there are 'Save', 'Continue', and 'Cancel' buttons.

2. Make any necessary changes.
3. Click **Save**.

## Add Transactions to Packet

There are a few ways to add a transaction to a packet.

One way is adding a “like”/or same-type transaction to an existing packet. If you have created a transfer (or an interest) application within the existing packet, the system provides the ability to add another transfer (or interest) application within the same packet. This function is located at the bottom of the application screen.



1. Once you have saved and validated your work, click **Add Transfer** (if you are completing a transfer transaction) or **Add Interest** (if you are completing an interest transaction).

The screenshot shows the 'Packet Content' interface. At the top right, there are buttons for 'Edit Header' and 'Submit Packet'. Below this is the 'Packet Header Info' section, which is divided into two columns. The left column, 'Packet Information', contains: Submitting Party: Train50, Client No: 400031930, Packet Description: Status: Draft, 10 Research Dr, Regina, Saskatchewan, Canada, Packet Type: Title Processing, Packet No: 200088457, and Expiry Date: 10-Apr-2013. The right column, 'Account Information', contains: Account Number: 00001082.

2. The screen will refresh and take you back to the **Packet Header Info** screen found under the **Select or Create Packet** header.

The screenshot shows the 'Select or Create Transaction for Packet 200088457' interface. It has a 'New Transfer Transaction:' section with radio buttons for 'Title Transfer' (selected), 'Transfer to Surviving Joint Tenant', 'Transmission', 'Mineral Commodity Split', and 'Alternate Authority'. A 'Create' button is below. Below that is a 'Select Existing Transfer Transaction:' section with a dropdown menu and a 'Select' button.

3. From here you may select or create the (new) transaction, still within the original packet.

As long as you are adding similar/same transactions within the packet you can use the **Add Transfer** (or **Add Interest**) button at the bottom of the application screen.

**Note:** A further choice to adding another and/or different application within the same packet is to use the **View Packet Content** button.



Once this button is pressed, the screen refreshes and places you in the **Packet Content** screen. Just below the **Packet Header Info** is a window where you can add a different type of transaction to your already existing packet.

This screenshot is similar to the first one, showing the 'Packet Content' interface with 'Packet Header Info' and 'Account Information'. At the bottom of the screen, there is a new window with radio buttons for 'Add: Transform', 'Interest', and 'Transfer', followed by an 'Add' button and a 'Resequencing' button with a help icon.

1. Select the radio button in front of the transaction type you wish to add.
2. Click **Add**. The system opens the selected transaction tab.

**Note:** You may also add a transaction to an existing from the packet content list, however the packet you are adding to must be in draft. The system will only allow you to view the packet contents of a draft packet.

### Re-sequence Transactions

The re-sequence function allows the user to change the order of the transactions or applications in the packet currently being viewed. Only packets with a status of “Draft” can be re-sequenced.

The **Resequence** button can only be accessed from the **View Packet Contents** button located from either the **Packet Mgmt** tab

The screenshot shows the 'Draft Packets' section of the OLS Online Submission Tool. It features a search bar with fields for 'Packet No.' and 'Client Ref. No.', and a 'Search' button. Below the search bar, there are three draft packets listed in a table. The table has columns for Packet No., Reference No., Description, Packet Type, Created On, Last Modified, and Expiry Date. The first packet is selected with a checkbox.

Packet No.	Reference No.	Description	Packet Type	Created On	Last Modified	Expiry Date
200088514			Title Processing	15-Oct-2012	15-Oct-2012	16-Apr-2013
<input checked="" type="checkbox"/> 200088457			Title Processing	09-Oct-2012	09-Oct-2012	10-Apr-2013
<input type="checkbox"/> 200088446			Title Processing	09-Oct-2012	09-Oct-2012	10-Apr-2013

or at the bottom of the screen within the application currently being viewed.

A row of five buttons: 'View Packet Content', 'Create Summary Report', 'Add Transfer', 'Submit Packet', and 'Cancel Packet'.

1. Click **View Packet Content**. The **Packet Content** screen will display.

The screenshot shows the 'Packet Content' screen. It has a 'Packet Header Info' section with the following details: Submitting Party: Train50, Client No: 400031930, Packet Type: Title Processing, Status: Draft, and Expiry Date: 10-Apr-2013. The 'Account Information' section shows Account Number: 00001082. At the bottom, there are radio buttons for 'Add' (Transform, Interest, Transfer) and a 'Resequence' button.

2. Click the **Resequence** button. A new window will open showing a list of applications which can be re-sequenced in the order that you choose.

Packet Number: 200088457

Packet Description:

1. Select Transaction(s) to move:

- Application Group # 1 - Title Transfer - no description
- Application Group # 2 - Title Transfer - no description

(SHIFT + click to select multiple transactions)

2. Select New Location:

Move before transaction no:

Move after transaction no:

Move

OK Cancel

**Note:** Each transaction in the list on the left side of the screen includes a Sequence number.

3. Select the transaction or sequence group of transactions (by using the mouse to highlight or **SHIFT-Click**) to be re-sequenced.
4. Determine if you want to move the transaction(s) before or after another transaction in the packet and click the appropriate radio button.
5. Enter where in the sequence you want the selected transaction to be moved to, either before or after a specific transaction number.
6. Click **Move**. Repeat these steps if other transactions are to be re-sequenced.
7. Click **OK** to save the new sequence or **Cancel** to return the transactions to their original sequence. The system will return you to the **Packet Content List** and show the transactions in the new sequence.

## Edit Transactions/Applications

Packet Content Edit Header Submit Packet

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**Packet Header Info**

<p><b>Packet Information</b>                  Submitting Party: Train30 10 Research Dr, Regina, Saskatchewan                  Client No: 400031930 Packet Type: Title Processing                  Client Ref. No: Packet No: 200054551                  Packet Description: willis interests                  Status: Draft Expiry Date: 14-Nov-2008</p>	<p><b>Account Information</b>                  Account Number: <input type="text" value="00001052"/></p>
------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--------------------------------------------------------------------------------------------------------------

Add:  Transform  Interest  Transfer

---

**Title Transfer** Application Group #1 Hide this section

Applications Open Delete

App #	Application Type	Holder/Owner	Ref. Land Description	Parcel Class Code	Authorizations
<input type="radio"/> 1	Surrender	Willis, Cemi	1E 20 21 12 3 Ext 0 As described on Certificate of Title 52N955544.	Unknown	1
<input type="radio"/> 2	Setup	Train30	1E 20 21 12 3 Ext 0 As described on Certificate of Title 52N955544.	Unknown	
<input type="radio"/> 3	Setup	Train30	SE 20 21 12 3 Ext 0 As described on Certificate of Title 52N955544.	Unknown	
<input type="radio"/> 4	Setup	Train30	1E 20 21 12 3 Ext 0 As described on Certificate of Title 52N955544.	Unknown	
<input type="radio"/> 5	Setup	Train30	SE 20 21 12 3 Ext 0 As described on Certificate of Title 52N955544.	Unknown	

1. Click the radio button to the left of the Application you wish to edit and click the **Open** button. The system will open the appropriate Transaction tab and the application information will be displayed.
2. Make the necessary changes.
3. Click **Save** at the bottom of the screen to save the changes.

**Note:** For details on editing or changing the transaction/application information, see the appropriate module for that transaction type.

## Delete Transactions

Packet Content Edit Header Submit Packet

**Packet Header Info**

<b>Packet Information</b>	10 Research Dr, Regina, Saskatchewan	<b>Account Information</b>
Submitting Party: Train30	Packet Type: Title Processing	Account Number: 00001082
Client No: 400031930	Packet No: 200054551	
Client Ref. No:	Expiry Date: 14-Nov-2008	
Packet Description: Willis interests		
Status: Draft		

Add:  Transform  Interest  Transfer Add Resequence

**Title Transfer** Application Group #1 Hide this section

Applications Open Delete

App. #	Application Type	Holder/Owner	Ref. Land Description	Parcel Class Code	Authorizations
<input type="radio"/> 1	Surrender	Willis, Demi	1E 20 21 12 3 Ext 0 As described on Certificate of Title 520P55544.	Unknown	1
<input type="radio"/> 2	Setup	Train30	1E 20 21 12 3 Ext 0 As described on Certificate of Title 520P55544.	Unknown	
<input type="radio"/> 3	Setup	Train30	SE 20 21 12 3 Ext 0 As described on Certificate of Title 520P55544.	Unknown	
<input type="radio"/> 4	Setup	Train30	1E 20 21 12 3 Ext 0 As described on Certificate of Title 520P55544.	Unknown	
<input type="radio"/> 5	Setup	Train30	SE 20 21 12 3 Ext 0 As described on Certificate of Title 520P55544.	Unknown	

1. Select one or more packets.
2. Click **Delete**. The system will display a confirmation message.



3. Click **OK**. The system deletes the packet(s) and all associated.

## Create a Packet

Select or Create Packet Hide this section

Create in a New Packet

Add to Existing Packet

1. To create a new packet, select the "Create in a New Packet" **radio button**. The system will open the **Select or Create Packet** screen.

2. If the packet is to be submitted under a different client number, enter the new Client No: and click the **Find** link. The system will display the name and address of the new submitting party.
3. The account information can be changed if this packet is to be charged to a different account. Enter the **Account Number** and **Account Password** for that account.
4. Enter an optional **Packet Description** to help you identify the packet in the **Packets List**.
5. Click **Save** or **Continue**. The system will generate a packet number and refresh the screen allowing you to carry on with the transaction.

**Note:** If you entered a Client Reference during login, it is carried forward to this field. You can change or remove it if required. This number is for your information and is another way to distinguish this packet from others. The Client Ref. No. will appear on your ISC invoice for this packet.

## Validate Packet

You should validate your application when you are satisfied that all required elements are correct. If errors are encountered during the validation, a pop-up message box will be displayed and the screen will be repositioned to the **Validation Errors** section.

**Note:** If you have multiple applications in your packet, validate each application prior to submitting the packet.

Each transaction type has a specific number of applications that will determine whether a packet will be validated online. Generally, application validation will take a couple of minutes, however it could take longer for packets with a very large number of applications, setups or interests affecting a large number of titles. The Packet Status will change to “Being Validated” while validation is being performed. You will not be able to open or work on the packet until the offline validation has completed.

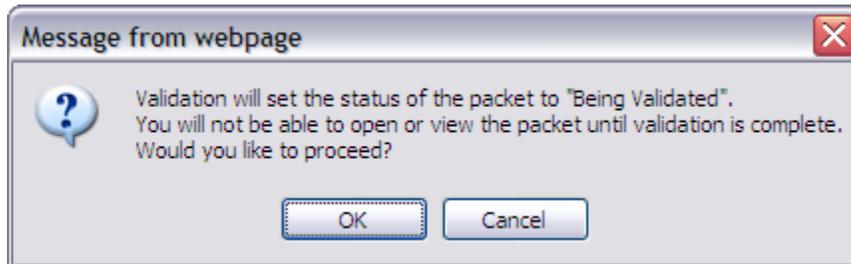
**Note:** If you exceed the maximum number of applications within your packet or if your transaction contains more than the system allotted attached items, validation will take place off-line. The maximum number of items in an OLS application group before validation is done offline is:

<i>Application Type</i>	<i>Maximum</i>	<i>Item Type</i>
Title Transfer	15	Applications
Transform	100	Applications
Interest Registration	100	Interests
Interest Discharge	15	Interests
Transmission	15	Titles
Surviving Joint Tenant	15	Titles
Alternate Authority	15	Titles/Interests
Commodity Split	100	Applications
Interest Assignment	100	New Shares
Interest Amendment	100	New Interests
Judgment Registration	101	Interests

Within the **View Packet** portion of the **Packet Management** screen the **Validate Packet** button is located on the bottom right hand corner of the screen, just below the **Manage Authorizations & Attachments** section.



When you click **Validate Packet** the system will display the following dialog box:



Click **OK** to validate the packet offline. Click **Cancel** if you do not want to validate the packet at this time.

**Note:** If you click **OK** to validate the packet offline, you will not be able to open or work on the packet until the validation has completed.

When the off-line validation is complete, the packet status will return to "Draft" and you will receive a notification in the **OLS Notification** area on the Home page. The notification will indicate if validation errors were encountered and include a link to open the packet in the **Packet Content List** page. Validation errors will be listed in the **Validation Errors** section of the page.

## Submit Packet

The screenshot shows a web interface titled "Manage Authorizations and Attachments". At the top, there is a "Packet List" section with a sub-header "Uploaded documents associated with this packet". Below this are several buttons: "Select All", "Show Packet Docs" (selected), "Show Application Docs", "View Doc", "Rename", "Remove", and "Add to My OLS Docs". A table with columns "Uploaded Document", "DSL Number", "Attached to Application As", "Virus Detected?", "File Type", and "File Size" is present but empty. Below the table are buttons for "New Upload" and "Add From OLS Docs". There is also a section for "Add DSL Item To Packet" with a "DSL#" input field, "Add To Packet", and "Search DSL" buttons. A "Download Cover Page" section has radio buttons for "Fax (Fax-In Cover Page)" (selected) and "Mail (Mail-In Cover Page)", along with a "Download Cover" button. At the bottom of the interface are buttons for "Save", "Validate", "Cancel Transaction", "Delete", "View Packet Content", "Create Summary Report", "Add Interest", "Submit Packet", and "Cancel Packet".

1. Click **Submit Packet**. The system will display the following confirmation screen. This page contains information from the packet header, a packet confirmation date, and an estimate of the Fees for this packet.

The screenshot shows a confirmation screen with the following content:

This packet will be submitted for data validation. You will be notified on the OLS Home page if there are any validation errors, otherwise the packet will be submitted to the queue for processing. Print

**Packet Header Info**

Packet Information		Account Information
Submitting Party: <b>Some Guy</b>	10 Research Dr, Regina, Saskatchewan	Account Number: <b>123456789</b>
Client No: <b>987654321</b>	Packet Type: Title Processing	
Client Ref. No:	Packet No: 200048756	
Packet Description: <b>Some Transaction</b>	Expiry Date: 23-Oct-2008	
Status: Draft		

**Packet Confirmation Date:**  
This information is being provided for information purposes only. The date may not reflect the actual date of submission, because submission does not occur until you have continued submission of this packet by clicking on the "OK" button.

Confirmation Date: Wednesday, April 23, 2008 10:20:42 AM

**Estimated Fees:**  
(Note - Final cost will be determined at registration, this is an estimate only.)

Total estimated fees for the packet are: **\$200.00**

Continue submission of this packet? OK Cancel

Once you have verified the accuracy of the information, click **OK** to submit the packet. The system takes you to the **All Packets** view of the Packet Management tab. The packet status will change from "Draft" to "Pending Submit."

**Note:** If you need a copy of this confirmation report, you may print it from here.

**Note:** If you do not wish to submit your packet at this time, you would click **Cancel** which cancels the submission and leaves your packet in “Draft” status.

### ***Packet Expiry***

Packets in the OLS system will expire and be removed from the system after a certain length of time. The length of time is based on the Packet Status as follows:

- “Draft” packets will expire and be removed from the system 183 days after the Last Modification date. The system will generate a reminder notification 30 days before the packet expires. The notification will appear in the OLS Notification area on the OLS Home page. The expiry date can be reset and extended by opening the packet and saving it. This updates the Last Modification date and the 183 day count begins again.
- “Being Validated” packets will never expire while in this status.
- “Pending Submit” packets will never expire while in this status.
- “Being Processed” packets will never expire while in this status.
- “Registered” packets will expire and be removed from the system 30 days after being registered. Use the Packet **Copy** function to create a “Draft” copy of the packet if you need to save it longer. The system will not generate a reminder notification.
- “Rejected” packets will expire and be removed from the system 30 days after being rejected. Use the Packet **Correct** function to create a “Draft” copy of the packet to extend the expiry date. The system will not generate a reminder notification.

## Notables

- Ensure that your browser print setting are set to “Print background colors and images.” If these settings are not selected, portions of the screen will not print correctly.
- A copied or corrected packet will only include Authorization and/or Attachment documents that are referenced in a Transaction or the original Packet. If the original packet includes Authorization and/or Attachment documents that are not referenced in a Transaction, they will not be copied.
- Draft packets will expire 183 days after the Last Modification Date. Open and save the packet to reset and extend the expiry date.