Creating Custom Packages

Packages are a combination of documents and reports bundled together to create one comprehensive item. An Organization Package can include Directors Resolutions, Shareholders Resolutions, By Laws, Share Certificates and Directors, Officers and Shareholders Registers as well as the Reporting Letter.

Custom Packages can be setup through **Tools > Data Maintenance > Document > Packages**. A Package is made up of the following Items.

Package ID – This is a unique number that is assigned to the package. All documents and reports in this package must have the same number.

Package Description – This is the name of the package that the Users will see. All documents and reports in this package must have the same Package Description.

Jurisdiction ID – Contents of the package can be included or excluded based on their Jurisdiction. A Jurisdiction ID of 0 means that this document or report will be included regardless of its home Jurisdiction. **NOTE**: The Jurisdiction ID will not filter content within a document or a report, it is only used to determine if the item should be included

Jurisdiction ID	Jurisdiction
1	Alberta
2	British Columbia
3	Canada
4	Manitoba
5	New Brunswick
6	Newfoundland
7	Northwest Territories
8	Nova Scotia
9	Ontario
10	Prince Edward Island
11	Quebec
12	Saskatchewan
13	Yukon
14	Nunavut

Type – This column is based on a query type to populate the document. This type should match the related column in the document table or the docType property of the document. Most documents that are not directly related to Directors, Officers or Share Transactions can be a Type of 10000. For Reports, the Type must match the type number in the reports table below.

Template Name – This is the exact name of the Template. For Documents, it must include the extension. For Reports, no extension is required.

Template – This is the name of the document the User would see if they ran this document independently of the package.

Order – This Column determines the order of the document or report within the package. An item with 1 would appear first in the package. The Sort items should be unique within the package group.

IsDocument – This column determines if the item is a document or a report. -1 is a document and 0 is a report.

The number and type of Documents that can be included in the package is unlimited. The reports can be selected from the following:

Type	Template Name	Template Description
1	Corporate Information Sheet - Current	Corporate Information Sheet –
17	Shareholders' Register	Shareholders' Register
27	Officers' Register	Officers' Register
28	Directors' Register	Directors' Register

The resulting package will appear as the following.

Package ID	Package Description	Jurisdiction ID	Type	Template Name	Template Description	Order	Is Document
17	Annual Letter Package	0	10000	0010AnnualsLetter.det	Annual Letter	1	-1
17	Annual Letter Package	0	1	Corporate Information Sheet	Corporate Information Sheet	2	0

Once a custom group has been created, it can be selected from create document icon under the Packages Folder.
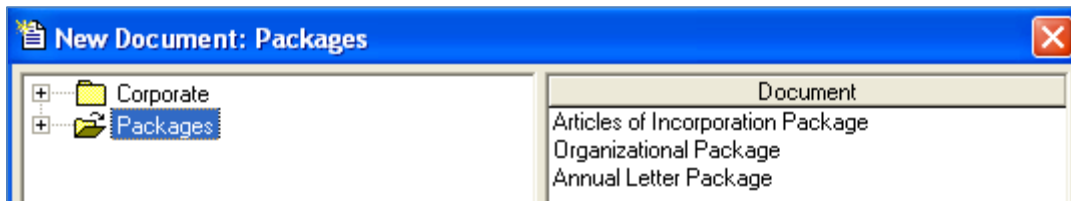
The resulting package will be one Word document allowing for quick review, tasking and printing.

There are special features for Documents with a sort Order of 1. All other documents in the package will have the formatting of this document. It is important to have headers, footers and page margins correct for the first document to ensure proper formatting.

Placing Firm headers and footers on Reports - All reports in a package can have headers or footers appear on them. For this feature to appear, the first document of the package must be a Word Template, .dot or .det file. In this initial document, set up the second page header and footer. Check Different first page in the Layout tab if the header and footer of subsequent pages is to be different. Page numbering can also be produced to number every page in a Package.