NSW Resources
Resources Regulator

Titles Management System (TMS)

User guide

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Amendment schedule		
Date	Version	Amendment
December 2019	1.0	First published. Phase 1
June 2020	1.1	Phase 2: allows the lodgement of applications for the grant and renewal of mineral and coal authorities, enable the creation of a PDF version of your application, track status of dealings lodged via other channels, automatically create the application and renewal dealing in the public register.
December 2020	1.2	Phase 3: allows users to lodge other types of applications required by the *Mining Act 1992* and *Petroleum (Onshore) Act 1991.*
March 2021	1.3	Phase 3: allows users to reassign draft applications to other associated TMS users and for offline applications to have full case tracking visibility.
September 2021	1.4	Phase 4: additional dealings delivered. TMS users can now lodge exploration reports and data files via TMS. New Reports tab in the dashboard.
August 2024	2.0	Consolidates information on phases 2,3,4 and updates content to reflect system developments.

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Purpose

This guide is to inform and assist users in creating their TMS account, provide an overview of the dashboard and summaries the standard TMS screens.

Users with a TMS account can:

- personalise their dashboard to track the progress of lodged applications
- save draft applications for completion later
- geospatially select application areas
- manage contact details in their profile which will flow through to applications in TMS
- attach documents to applications prior to and post lodgement
- securely pay for fees by credit card or direct deposit
- create a PDF of their application that can be shared and signed
- view details of all application fee payments
- lodge annual reports
- view key dates for annual reporting.

About the Titles Management System

The Titles Management System (TMS) is an electronic lodgement and case management system for the grant, renewal, transfer and cancellation of applications for:

- exploration licences, assessment leases and mining leases issued under the *Mining Act 1992*, and
- titles issued under the *Petroleum (Onshore) Act 1991*.

In addition, users can also:

- nominate a party for grant of an authority
- notify a change of agent
- notify a change of name
- reduce the application area
- request the Minister's consent to apply for an authority
- seek an exempted area approval
- seek the Minister's consent for a native title condition
- register, vary, cancel a legal or equitable interest
- notify a change of technical manager
- lodge exploration reporting (annual, relinquishment and final) and Onshore Petroleum Act reporting (annual, relinquishment, final, annual statistics, well completion, seismic survey, well assessment, well status
- apply for an extension to report/exemption from reporting

- seek approval for a significant variation to a work program
- notify of suspension of mining operations
- add a mineral to a mining lease
- add an ancillary mining activity condition
- consolidate mining leases
- suspend a condition
- vary an authorisation (as per Schedule 1B)
- apply for appointment of an arbitrator
- record a caveat
- devolve an authority
- change class of low-impact exploration licence
- lodge a significant improvement claim*
- lodge an agricultural land objection
- register, vary, renew, deregister a sub-lease
- alter colliery records
- associate with one or more companies or allow for a company to be affiliated with a subsidiary or parent company.

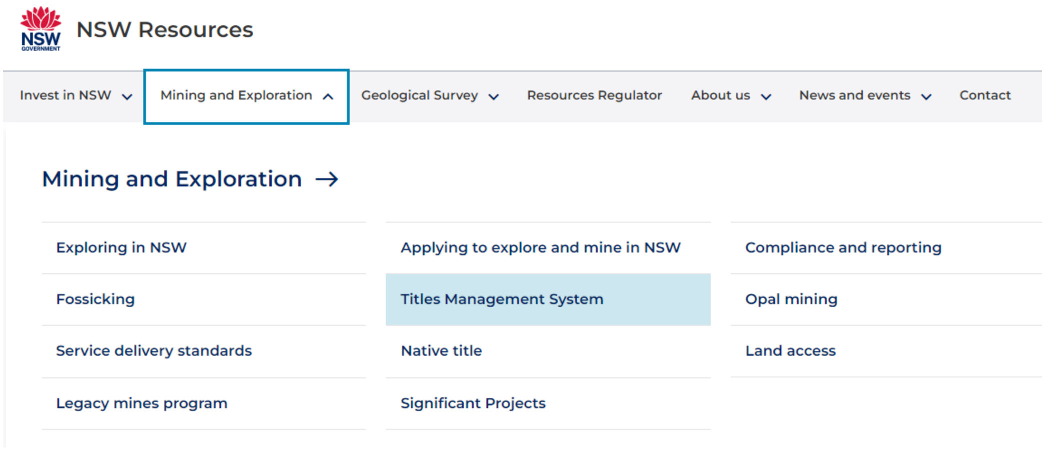
Help is available

If you need assistance with lodging applications or using the functionality in TMS, please email: titles@regional.nsw.gov.au and we will reply within two business days or call us on 02 4063 6600

Accessing TMS resources

Access TMS and supporting information through the department's website.

Figure 1 Screenshot of the departmental website and how to navigate to TMS.

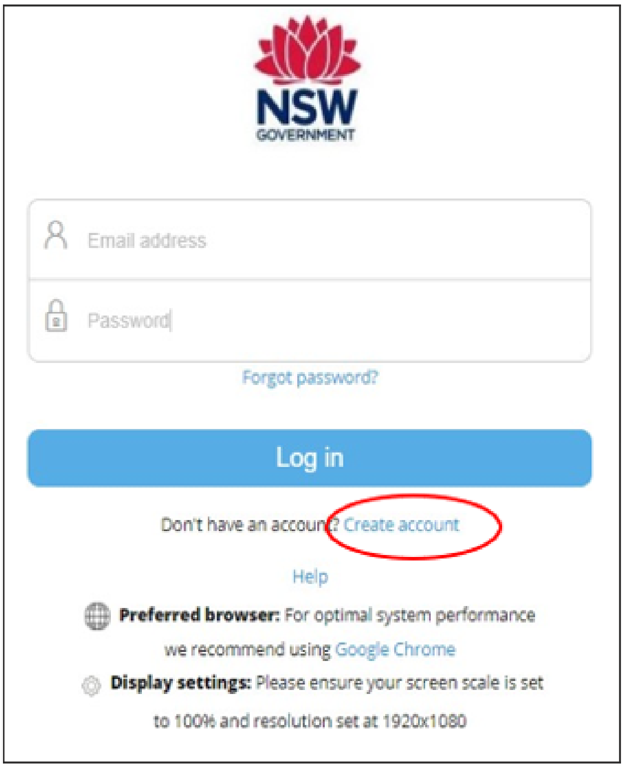


Creating your TMS account

To create your TMS account follow the steps below:

- Go to the TMS homepage at: https://tmsportal.pegacloud.net/prweb/IAC

Figure 2 TMS log-in screen



- Select 'Create account'.
- Enter the required details in the fields provided.
- Select the 'Create account' button. You will then receive a confirmation email to the address provided in step two.

- Open the confirmation email message and select the 'Verify" button.
- Enter the email address and the password you submitted in step two.
- Complete your profile details.
- On successful completion you will receive another confirmation email. You will now be able to login to TMS.

*If the email does not arrive within 30 minutes, please check your junk/spam folder.

*The link within the confirmation email is only active for 24 hours.

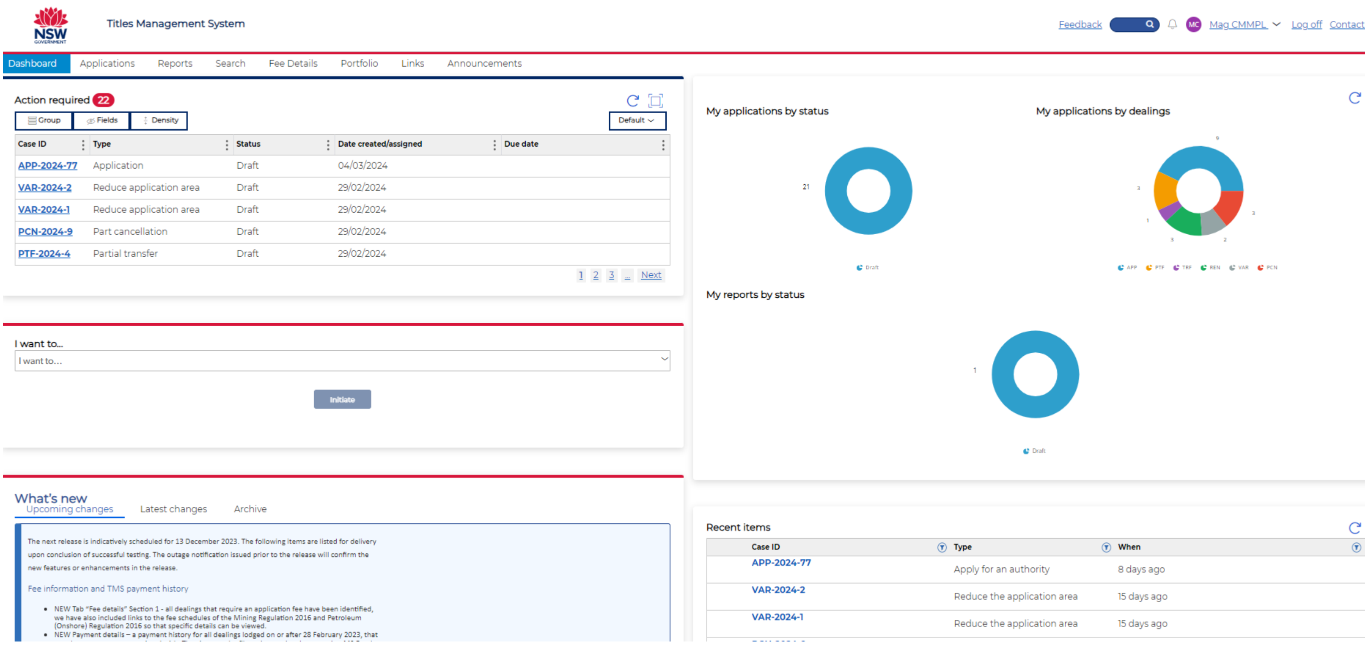
Preferred browser and display settings

For optimal system performance we recommend using Google Chrome. Please also ensure your display setting on your screen scale is set to 100% and resolution set at 1920 x 1080. To do this go to your computer settings, select System (Display, notifications, power) and under Display, select this resolution option from the available menu.

About the TMS dashboard

The dashboard is the user's central hub for accessing all functions provided by TMS.

Figure 3 Sample of the dashboard



The dashboard has 5 main panels.

'Actions required' panel (top left)

- This panel includes a list of cases which are assigned to the logged in user
- Actions would be assigned to the user in the following three scenarios:
  — Drafts, i.e., cases started and yet to be lodged
  — NoPD issued - action required, i.e., cases pending for customers response

— Authorise cases (for managers) – to review and approve association/affiliation requests

— Where a report has been returned for further action by the user

‘I want to’ panel (centre left)

- An intuitive way of starting a new transaction
- A user can either:
  - select a dealing type from the drop-down list. You may need to scroll down to see the full list of transactions that are available for you to initiate.
  - start typing the dealing type for the system to filter the options that will come up related to your search. E.g. if you type ‘*transfer*’ the two options for ‘apply for approval to part *transfer*’ and ‘apply for approval to *transfer*’ will appear.

Figure 4 Selecting a dealing type you wish to initiate from the drop-down list, scroll down for full list, then select and click on ‘Initiate’ button.

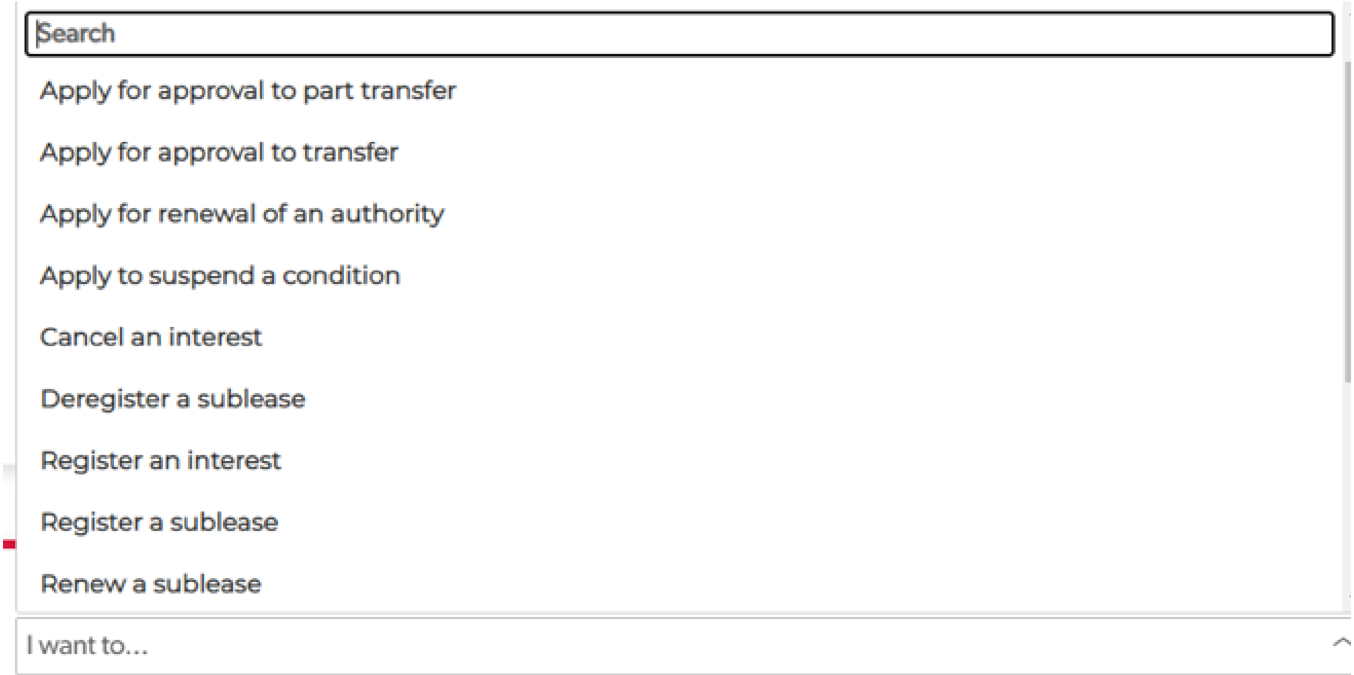


Figure 5 Start typing words relating to your intent and the relevant dealing types will appear for selection – what happens when you type ‘transfer’.

What's new' panel (bottom left)

- This panel is where we tell you about upcoming enhancements, the most recent changes and an archive of all the changes we have made.

Graph' panel (top right)

- This panel includes three pie charts:
  - applications by status
  - applications by dealing type
  - reports
- The intent of these charts is to provide a 'portfolio' view, including:
  - cases lodged or started (including drafts) by logged in customer
  - cases lodged by colleagues if association feature has been utilised

'Recent items' panel (bottom right)

- This panel allows users to view their most recent cases. Please note that the content in this section is read-only. It you want to continue a draft application; you must access that draft from the 'Actions required' section.

Customising your dashboard views

Expanding the 'Actions' panel to full-screen mode and back

Figure 6 Expand to full-screen mode – click on expand symbol on top right corner

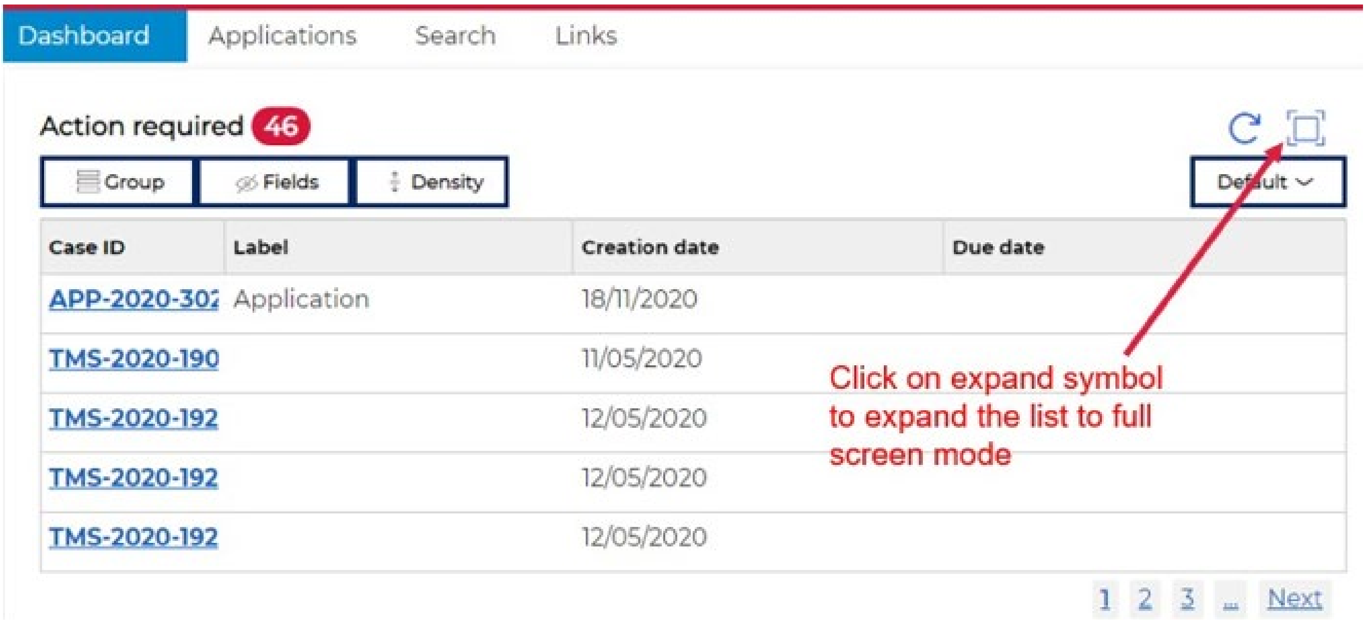
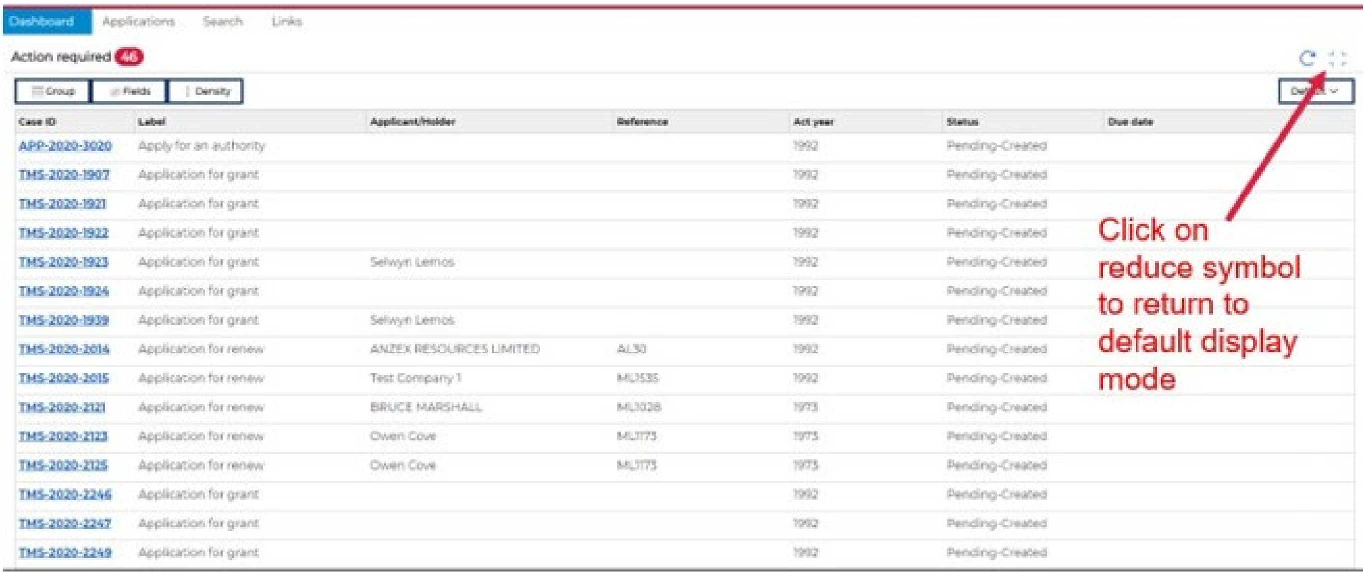


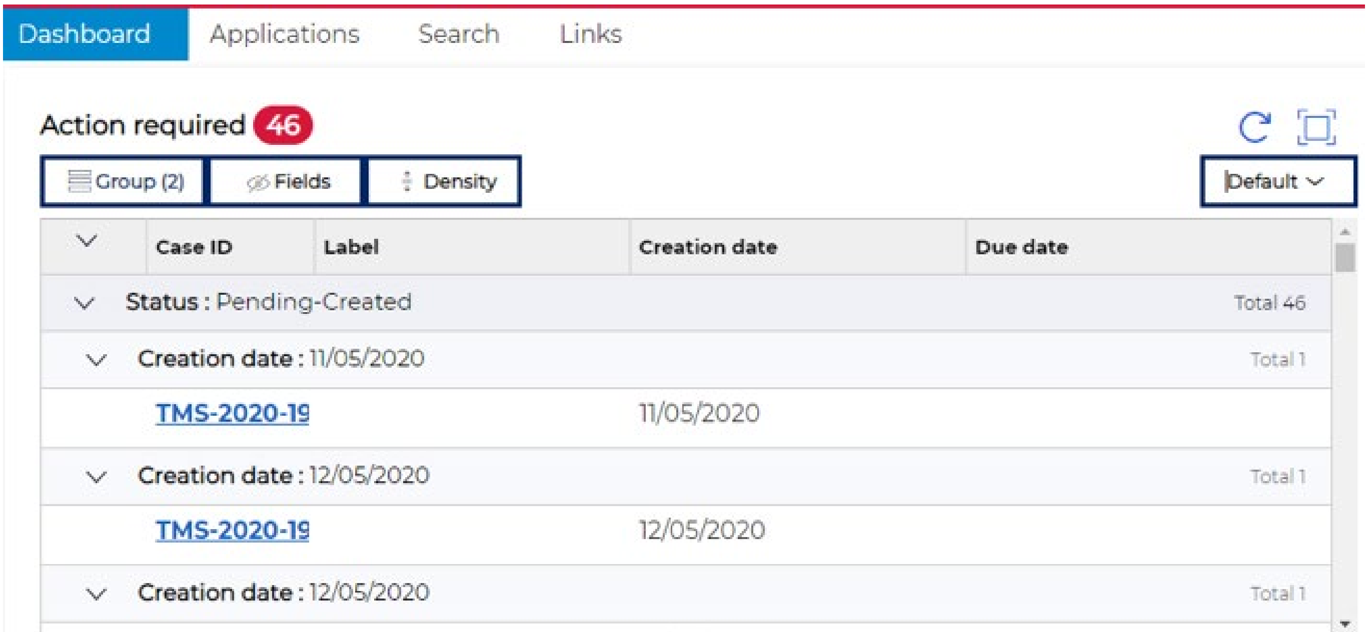
Figure 7 Return from full-screen mode to condensed mode – click on the reduce icon on top right corner.



Grouping the Action required list

Click on the Group button. Click on '+ Add a field to group'. Then choose option from Select field. You can choose to group either by Case ID, Label, Reference, Status, Creation Date or Due date. Use the Trash button to remove a selection.

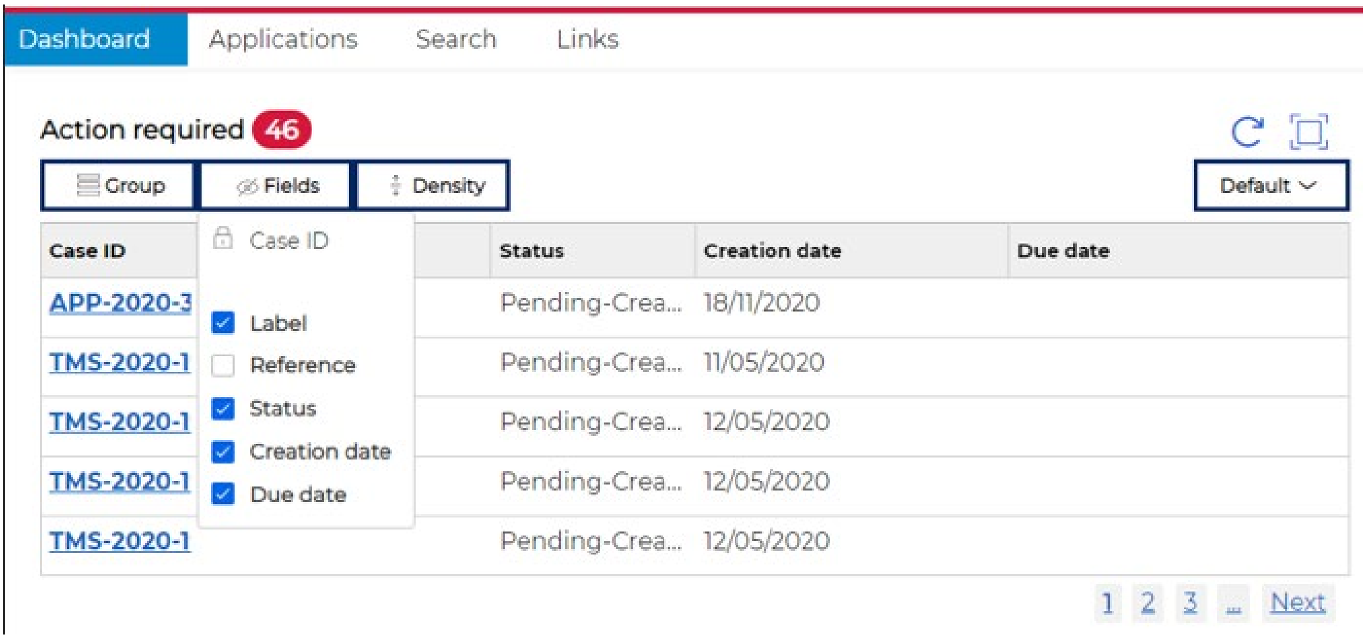
Figure 8 Sample customised display for Action required list, grouped by Creation date



Customising the fields for your Action required list

You can select, by ticking or unticking the available fields you wish to see on your Action required list.

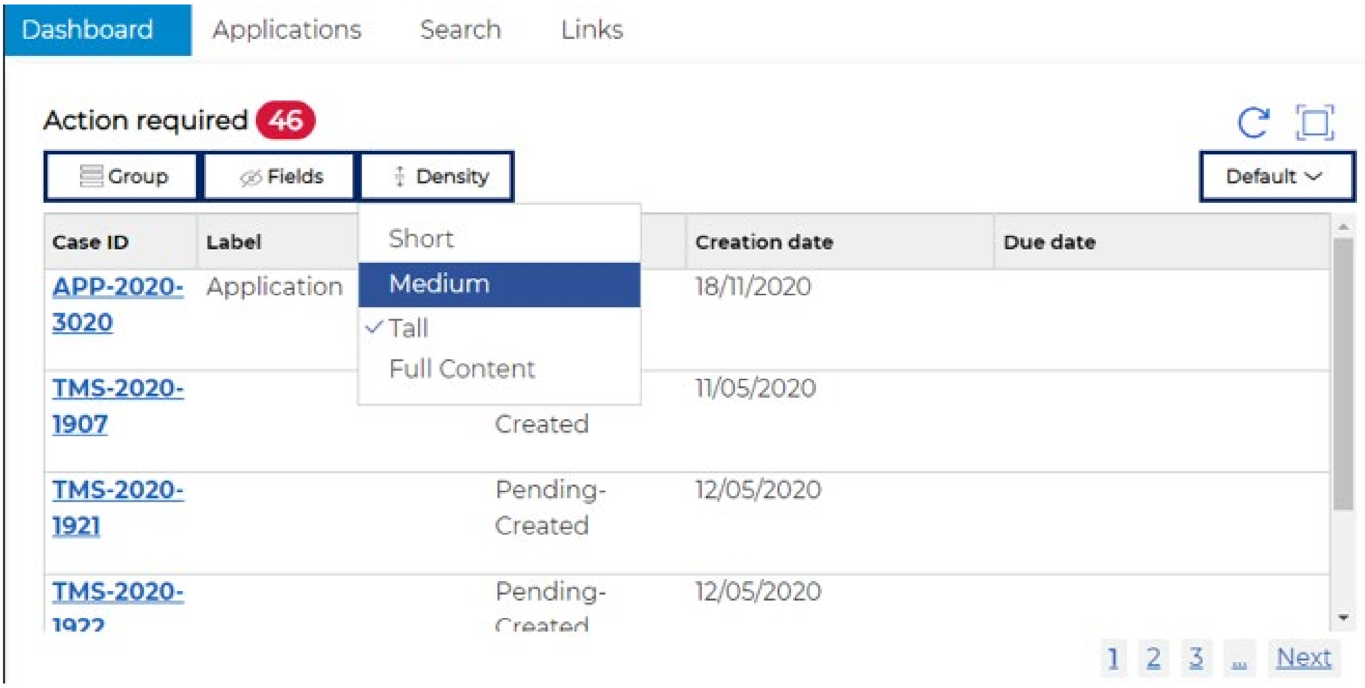
Figure 9 Selecting the fields you wish to see on your Actions required list



Customising display density for your Action required list

You can alter the density of the list by clicking on the 'Density' button and selecting from the available options; Short, Medium, Tall or Full Content.

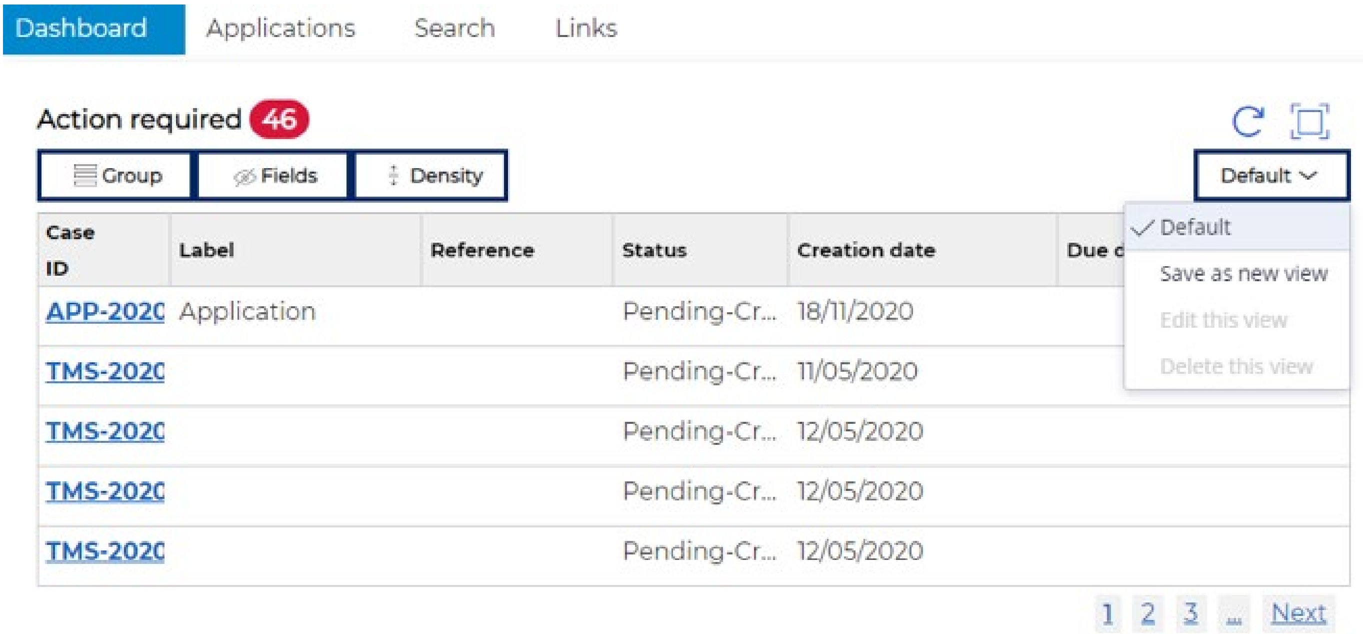
Figure 10 Selecting the density of the Actions required list



Saving your customised view for the Action required list

For each customisation view option, you can save your preferred view by clicking on the 'Default' button on the right of the list. When you click on 'Save as a new view', you will get the option to assign a View name, which you type into the field. You can also tick the box below to mark it as a default view. Once a named view is saved, it will be available for you to select as a display option moving forward. The customisation functionality offers you the ability to edit these saved view names or to delete them.

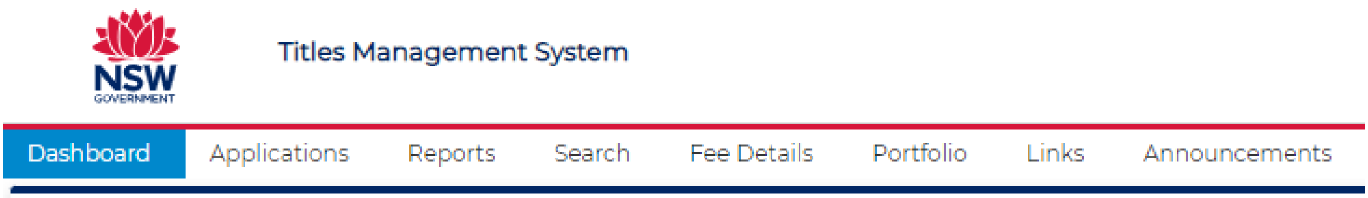
Figure 11 Saving a new view, via the Default button



Features to help you manage your account

There are several additional features that users may access from the dashboard ribbon.

Figure 12 Additional features



Tab	Function
Applications	Includes sub-sections for draft, lodged, completed and archived cases. You can monitor the progress of your pending cases in the lodged tab, also attach documents if required, initiate a conversation, request a waiver/extension, or export your application to PDF
Reports	Use this module to lodge your annual geological reports
Search	Provides high-level status information on all TMS cases
Fee details	Identifies those dealings that require and application fee for lodgment. Also provides a view of payments made in TMS
Portfolio view	Expiry and reporting due dates
Links	Hyperlinks to other useful websites

Tab	Function
Announcements	Lists all outage notifications or other communications posted on your dashboard

Profile management

TMS gives you the ability to:

- track the progress of your employer's applications
- have greater visibility of applications lodged by your colleagues
- oversee the progress of applications relating to any subsidiaries of a parent organisation, allow a parent organisation to have visibility over applications of their subsidiaries.

Association

TMS users can associate their profile with the company/s or employing companies they will be lodging applications on behalf of.

In scenarios where you are the application contact for multiple subsidiaries of a parent company or your employer; you are advised to associate your profile with the parent entity and then affiliate the parent entity with each of its subsidiaries.

Affiliation

TMS users can create and link a parent company with its subsidiaries which are either existing authority holders or applicants.

Benefits of associating and affiliating

By establishing these relationships of association and affiliation in TMS, a user can:

- create a portfolio view of your TMS transactions
- reassign draft applications to your colleagues
- view applications lodged by your colleagues (noting that a user will be able to view cases in draft status assigned or currently with their colleagues via the 'Company profile' page).

Portfolio view

A portfolio view is a comprehensive list of all applications where:

- you, and/or
- your (associated) company, and/or
- its subsidiary (affiliated) companies

are a party to the application. A portfolio view includes visibility of applications lodged by your colleagues.

Figure 13 Sample relationship diagram of a company entity in TMS with associations and affiliations

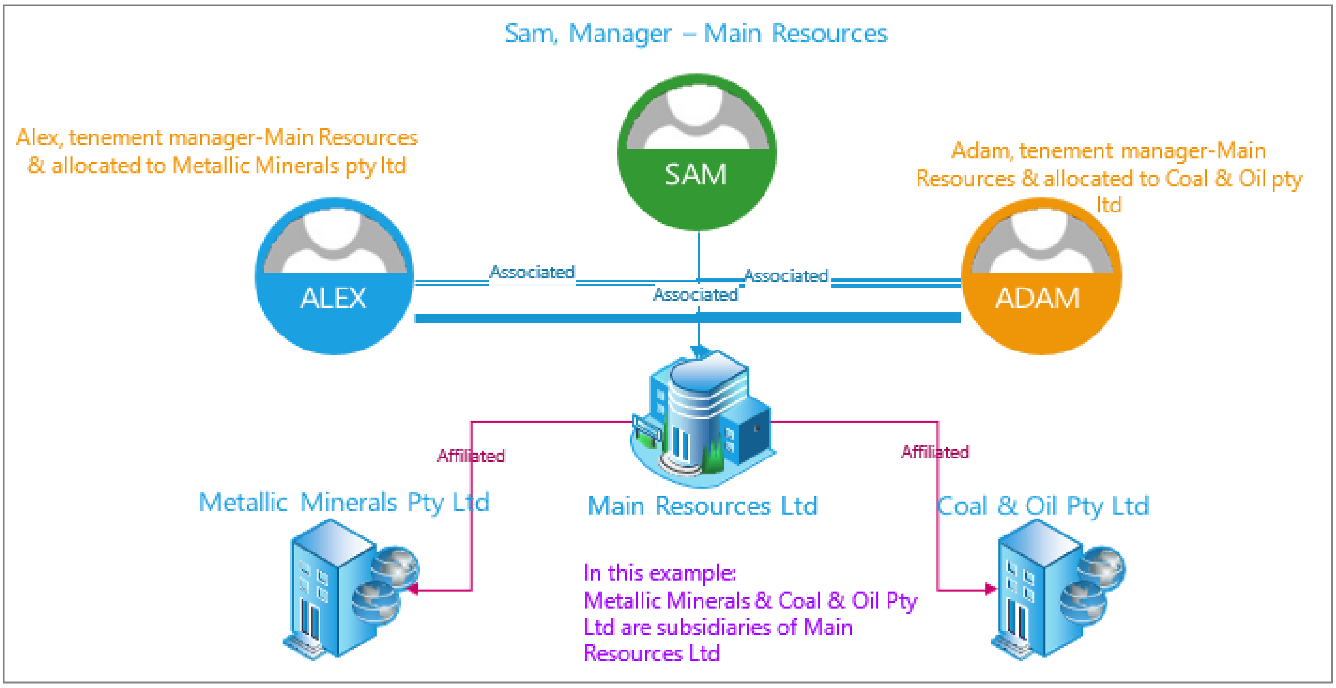
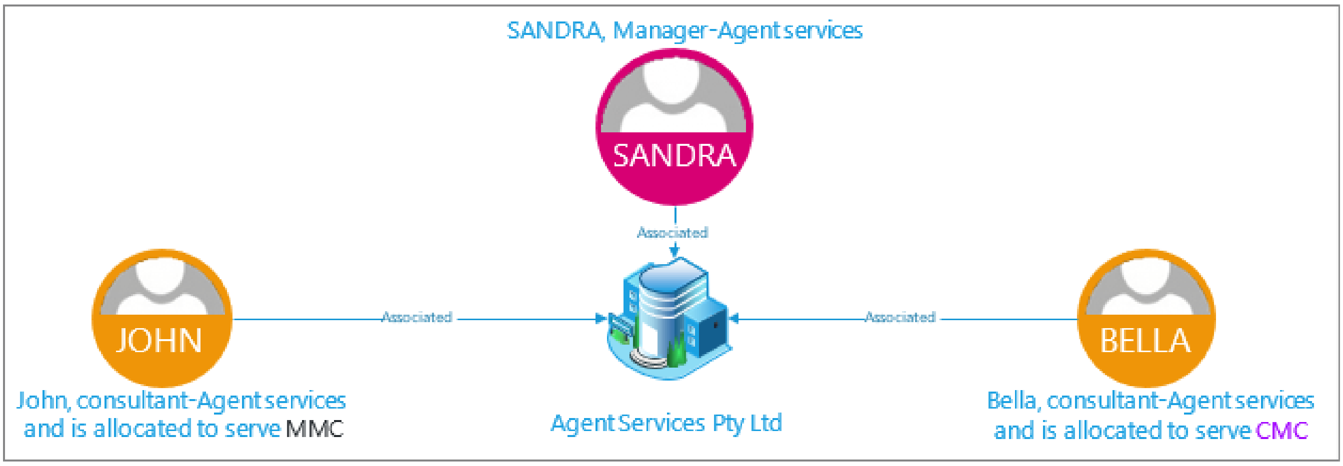


Figure 14 Sample relationship diagram of an agency in TMS with associations and affiliations



How to associate, affiliate and reassign?

Figure 15 How to associate – use 'My Profile' drop-down option on the top right of the dashboard

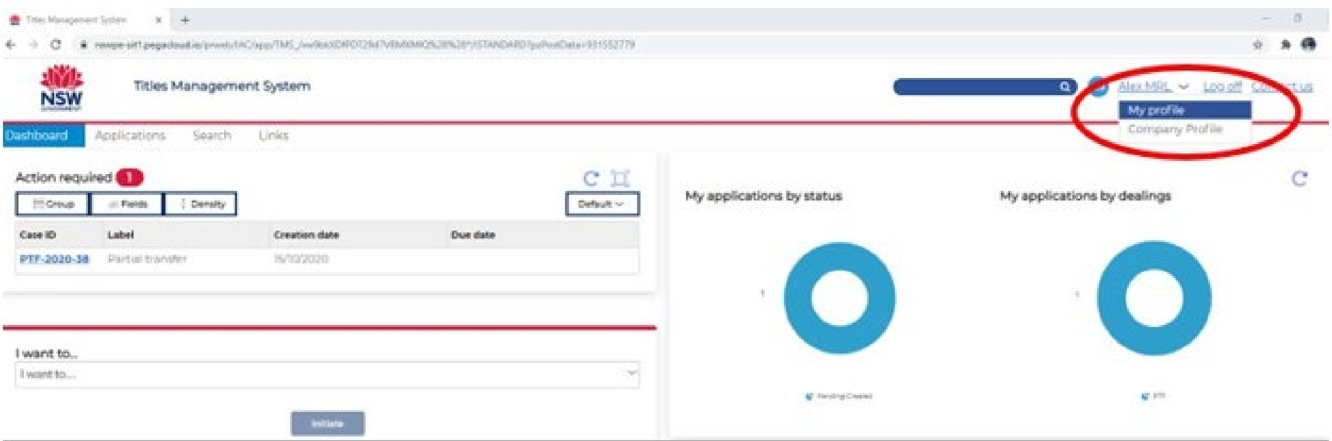
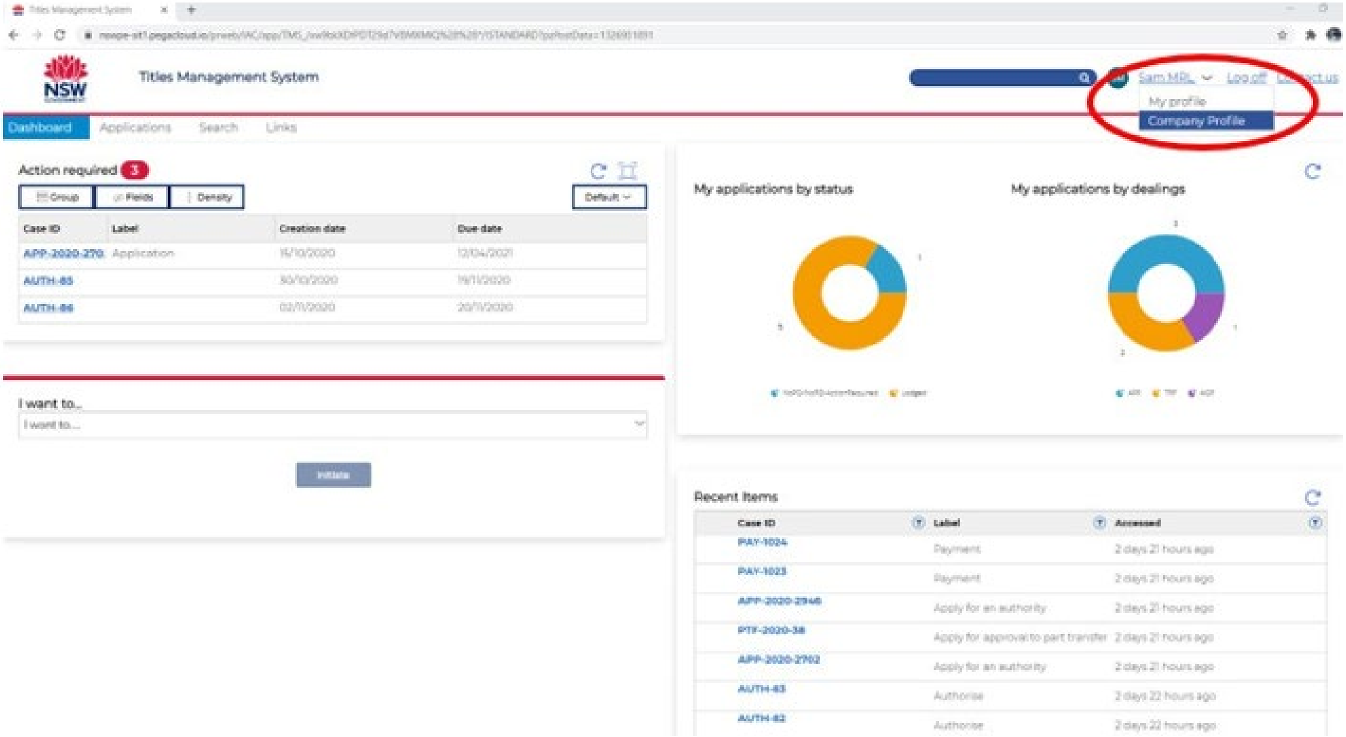


Figure 16 How to affiliate – use the ‘Company Profile’ drop-down option on the top right of the dashboard

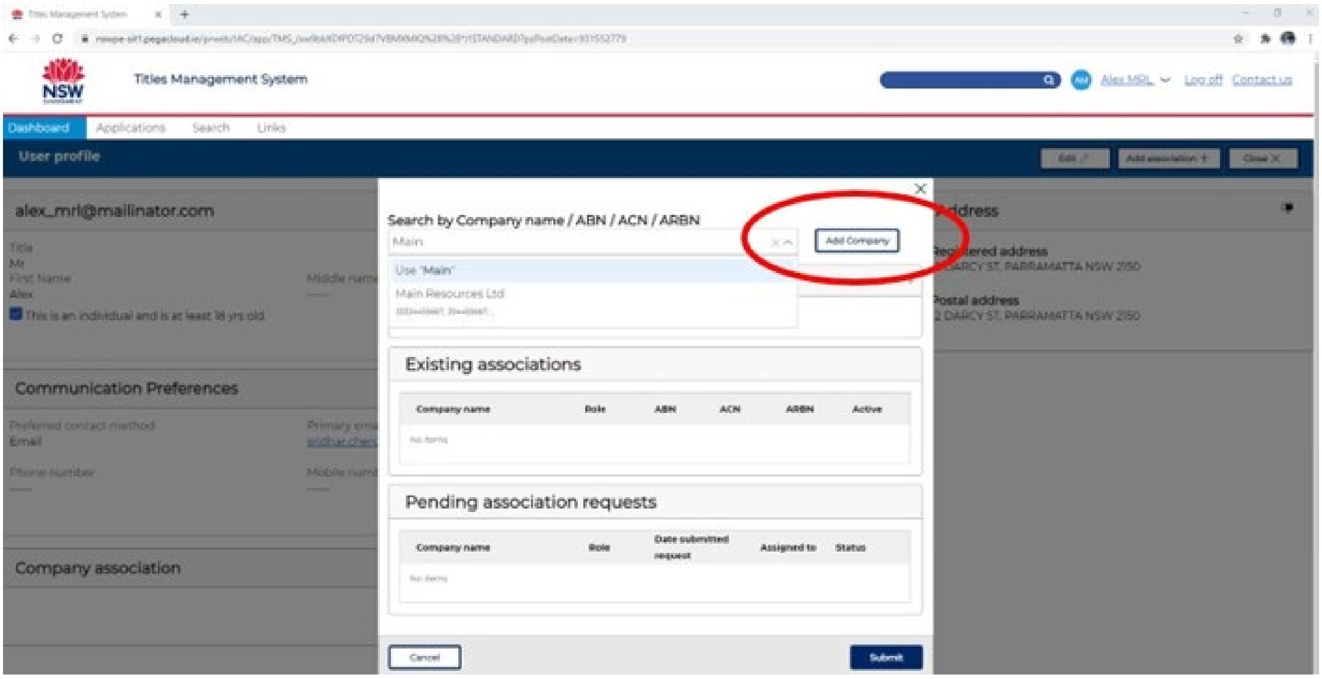


Other profile management features and questions

What if the company I wasn’t to associate with does not exist in TMS?

After searching and confirming the company does not exist in TMS, you will need to add the company first, using the ‘Add Company’ button.

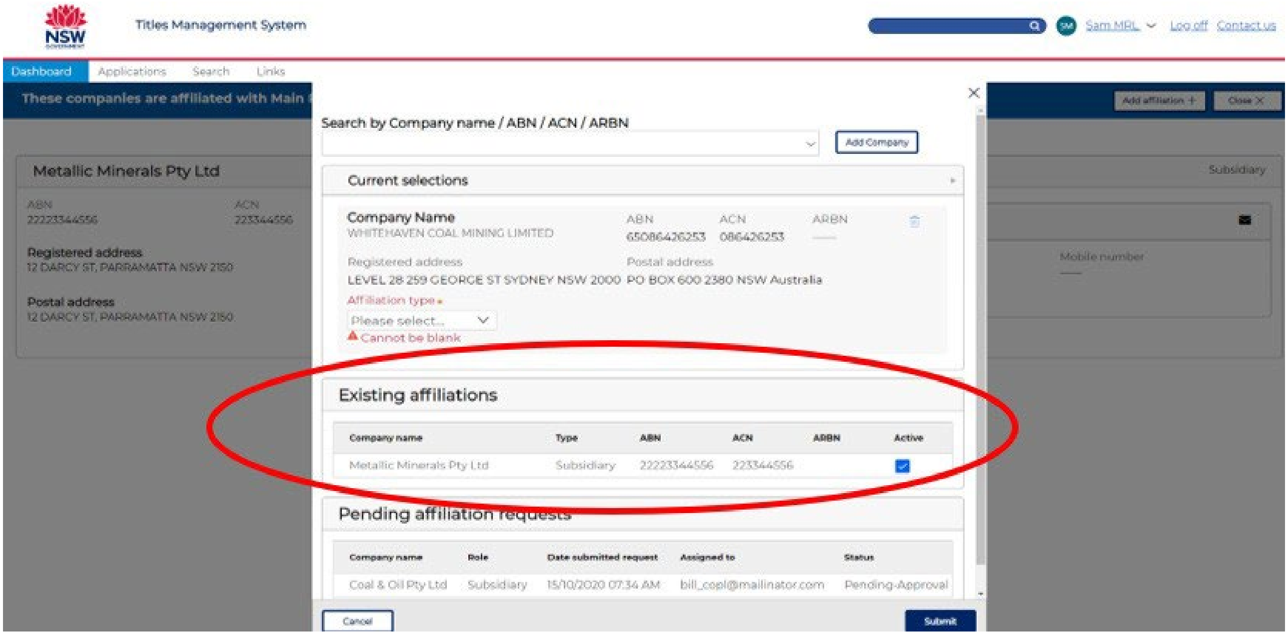
Figure 17 Adding a company – use the ‘Add Company’ button



How do I check my current associations/affiliations in TMS?

Any existing affiliations with a company will be displayed in the 'Existing affiliations' panel relating to that company.

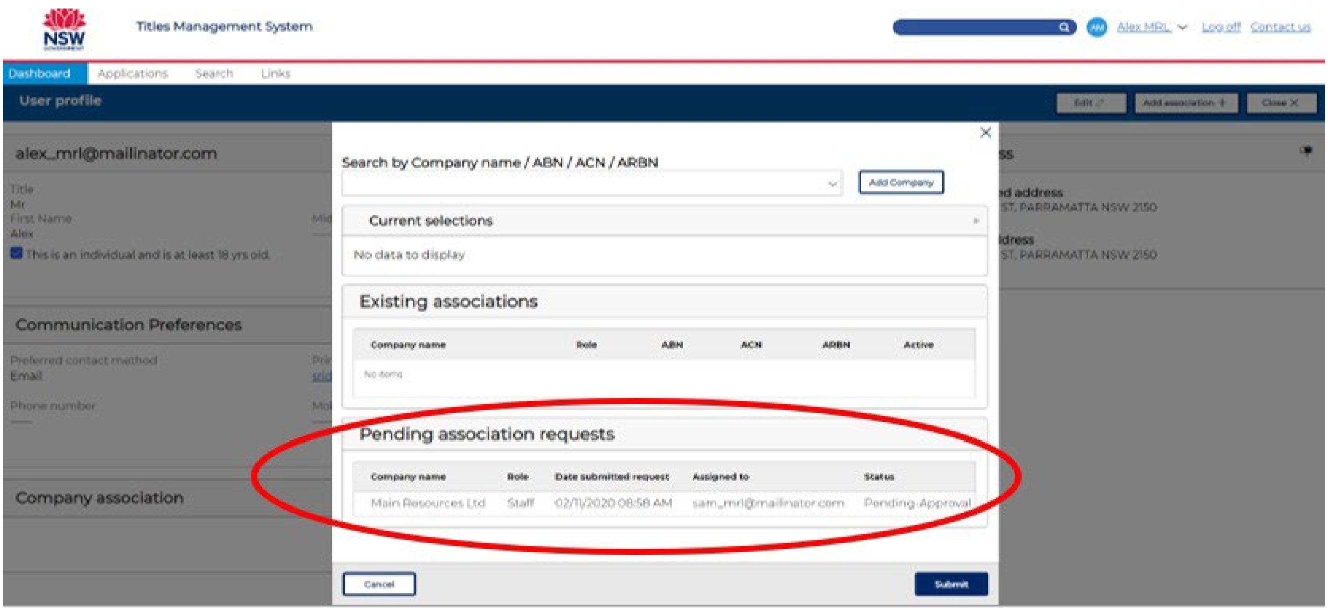
Figure 18 Checking for existing affiliations with a specific company



What happens after submitting a request for association or affiliation?

Once you have submitted a request to associate or affiliate a company with an existing one, the request will be sent to the owner of the relevant company profile for their approval. You will see your request in the 'Pending affiliations requests' panel.

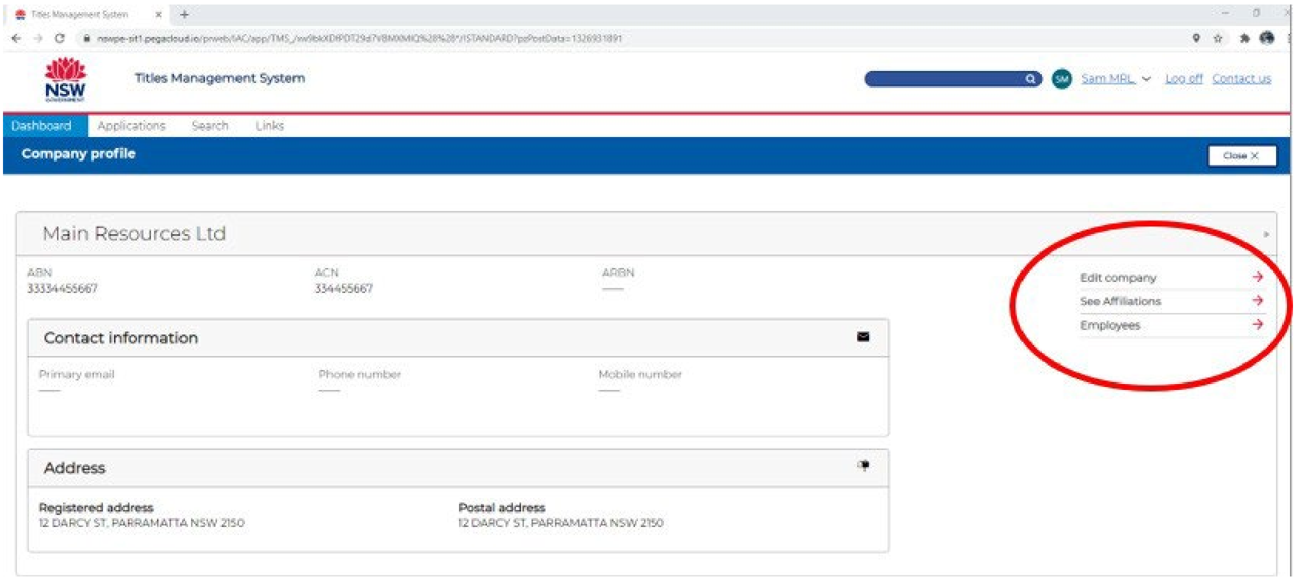
Figure 19 After submitting an association or affiliation request



How and where can I see list of TMS users currently associated with my company?

On the right-hand side of a Company profile page, there are options to 'Edit company', 'See affiliations' and 'Employees'.

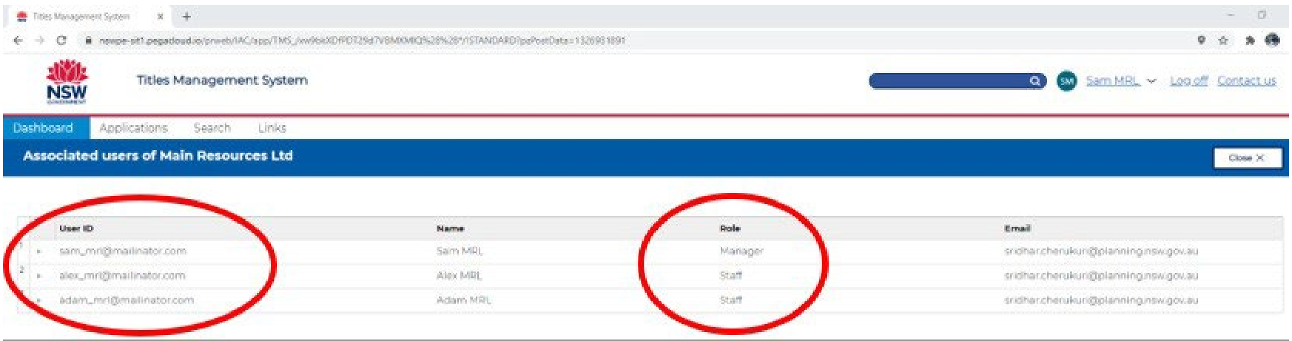
Figure 20 How to see a company's affiliations and employees.



How and where can I see list of the affiliations my company has?

When you click on Employees option, you will see the list users associated with the company.

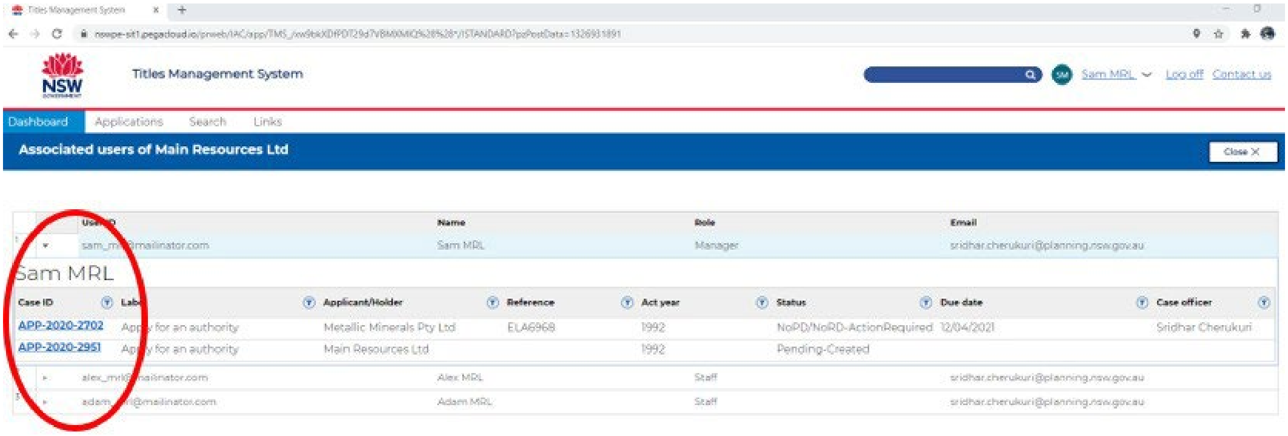
Figure 21 Viewing the associated users of a company



What is the difference between a manager versus staff role of companies?

- Manager of the company can view and edit:
  - company details
  - submitted affiliation requests
- Staff of the company can only view the above details.

Figure 22 Viewing the applications of the associated users of a company



Case tracking statuses

As an application is progressed by MEG, the applicant will be able to track its progress by the following statuses, offering more transparency to the customer:

Table 1. Case tracking statuses are available to the applicant

Status	Status description for the applicant
Draft	Content in progress, the applicant is preparing the application
Lodged	All required information must be provided by applicant
Assessment in progress	The application is undergoing assessment.
Awaiting proposed decision	The Notice of Proposed Decision is sent to the applicant
NoPD issued Action required	Applicant action is required to review the conditions, term, etc, paid monies or indicate that determination can proceed
Awaiting determination	The decision-maker considers the application and makes the determination. Payments processed if applicable.
Finalising	The outcome is communicated to the applicant. The Mining Titles Register is updated.
Registration in progress	Application to register transfer received
Returned to customer	The report has been lodged to the user for further action

Reassigning drafts in progress

TMS allows you to reassign an application you have created in TMS to another user to continue and lodge.

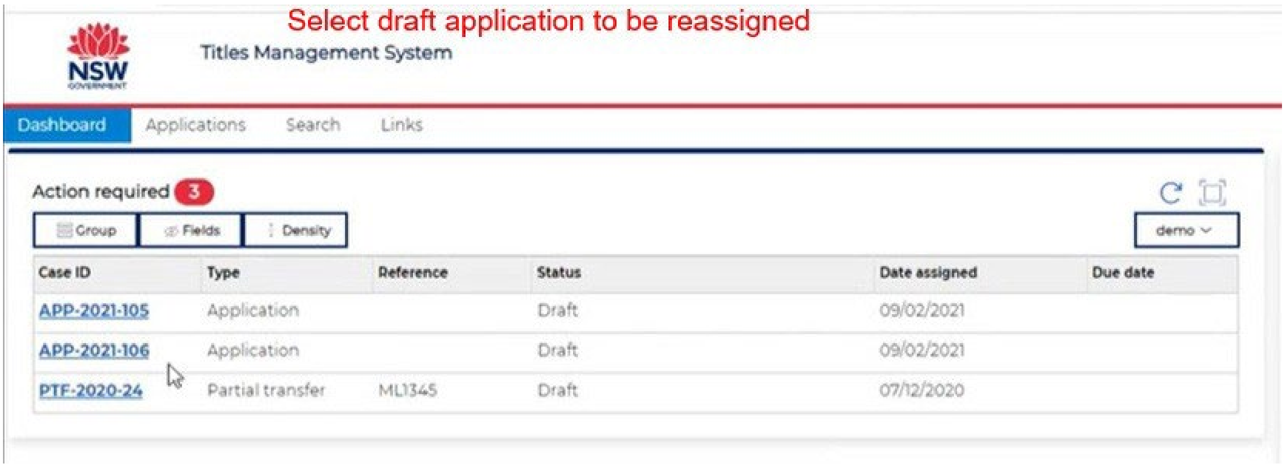
Whom can you reassign a draft application to?

A draft application can only be reassigned to another TMS user who is associated with the same company.

How to reassign a draft?

Select the draft from your dashboard list of current drafts that you wish to reassign and click to open the application.

Figure 23 Reassigning draft applications

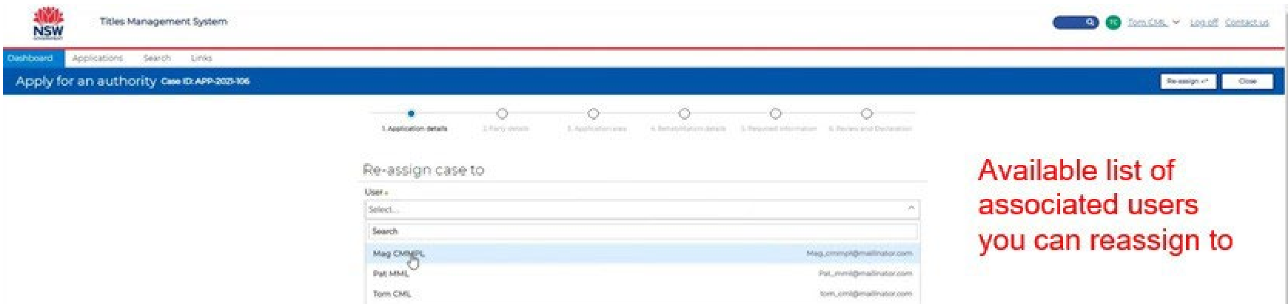


When working on the application, click on the “Reassign” button located on the top right corner of the screen.

Figure 24 The reassign button

You will then see a pick list of other associated TMS users whom you can select to reassign the draft application. Click on “Continue” to proceed with the reassignment.

Figure 25 Selecting an associated user



Following reassignment, the user will receive a notification email to confirm that the reassignment has been made.

The first TMS user will then also notice that the record is no longer visible in their dashboard list of current drafts.

Note that when the new assignee opens the draft in their dashboard list, they will be taken to the section in the draft that was last worked on. Other than the assignee being changed, nothing in the draft will be changed by the reassignment, including the contact person, assuming that information has already been completed in the Party Details section of the application.

Completing your application in TMS

Overview of TMS screens

TMS displays various screens to capture all the information required to complete your application. These same screens will be displayed for all interactions with the system.

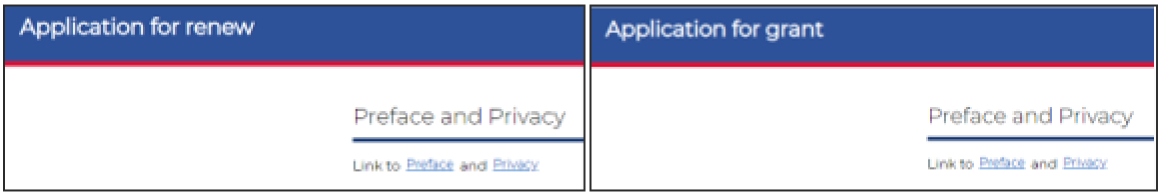
TMS also provides guidance notes specific to your application and helpful on-screen text to assist you to lodge applications.

We recommend you read the preface and privacy information prior to starting your application, available in the:

- 'Application for grant' screen – when applying for a new authority.
- 'Application for renew' screen – when renewing an existing authority.
- 'Lodge a report' screen – when lodging a new report.

A generic preface is also available for the remaining dealings.

Figure 26 Preface and privacy information



Apply for an authority screen

Selecting from the following options will inform the content of the following screens:

- Application Type - which is 'read-only' as per the selection made in the dashboard.
- Resource Type.
- Authority Type.
- Term of the Authority.

Renew or transfer an authority screen

When renewing an authority, you will be required to search either by Authority ID or holder name. From the search results provided, you must choose an authority and select the 'Create' button.

Application details screen

The application details screen includes questions specific to the application type you are lodging. For example, you may get asked whether you have development consent for a mining lease application, but this question will not display if you are lodging an exploration licence application for grant.

Party details screen for grant applications

The ‘Party details’ screen allows you to search for parties, add them to the application and assign them roles.

A TMS party is any person or company with a direct relationship to the application.

You can add a party using the ‘Add company’ feature if they are not already available in the drop-down list.

By assigning roles you confirm the responsibilities of each party. Roles include:

- main applicant*
- applicant
- technical manager
- application contact
- authorised agent
- mine operator.

*A main applicant does not have pre-eminence over any other applicant. The distinction is required for display purposes in other departmental services (e.g. Minview). The roles will change with the dealing type.

Privacy

For privacy reasons, you cannot add the name and contact details of another person. For example, if you want to identify the Technical Manager and the name is not found in the search feature you can attach their details in the required information screen and continue with the application. In this way, you can continue your application, with the relevant details however an individual’s information will not be visible to any other TMS account holder until that person creates their own TMS account.

The party details screen for renewals

When renewing an authority TMS will display the existing holders. You will be required to confirm those holders who are seeking renewal, the application contact and the technical manager. If relevant, the authorised agent may also be added. More guidance is available in the renewal party details screen.

The party details screens for other dealings

Depending on the dealing, the party details may vary, for example, a transfer will introduce the new party types of ‘transferor’ and ‘transferee’. For a sublease, you will be asked to nominate the ‘sublessee’. Help text will guide you where relevant.

Application area screen

This screen allows you to describe your application area. There are several methods available to do this. You may need to upload a file to view the area of interest. You will also be able to view overlapping authority and application information.

Depending on the dealing, you may not be required to provide spatial information, for example a request for approval to transfer does not require a spatial description and so the application area screen will not be displayed.

Note: If you upload a coordinate file or ESRI shapefile in this screen, you will need to upload it again in the required information screen.

The application area screen for renewals

When renewing an authority TMS will display the current area of your authority. You will be able to seek renewal over the whole area or reduce the area, in accordance with statutory requirements. More guidance is available in the renewal application area screen.

Note: If you upload a co-ordinate file or ESRI shapefile in this screen, you will need to upload it again in the required information screen.

Renewal justification screen

This screen allows you to directly input the information required to support your application for renewal. An interim feature will allow you to upload your statement (in the Required information screen) if you have already prepared it in a stand-alone document.

Required information screen

This screen displays the required information that must accompany the application.

Additional documents to further support the application can also be added using a general document upload function.

Review and declaration screen

This screen allows you to review all the details you have provided in your application and declare the information is correct.

This screen offers the ability to navigate back through the application, if necessary, prior to making payment and lodging the application.

Payment screen

The 'Payment screen' calculates the fees required for the application and offers a range of payment methods.

In case of online payments (with credit/debit card), once the payment is successful, the system will display a receipt that will be automatically attached to your TMS case. You will be required to upload proof of payment for other payment methods (i.e. direct deposit, confirmation in the payment screen).

Save the application to PDF

TMS allows the user to export the application data to a PDF document. Find this feature in the:

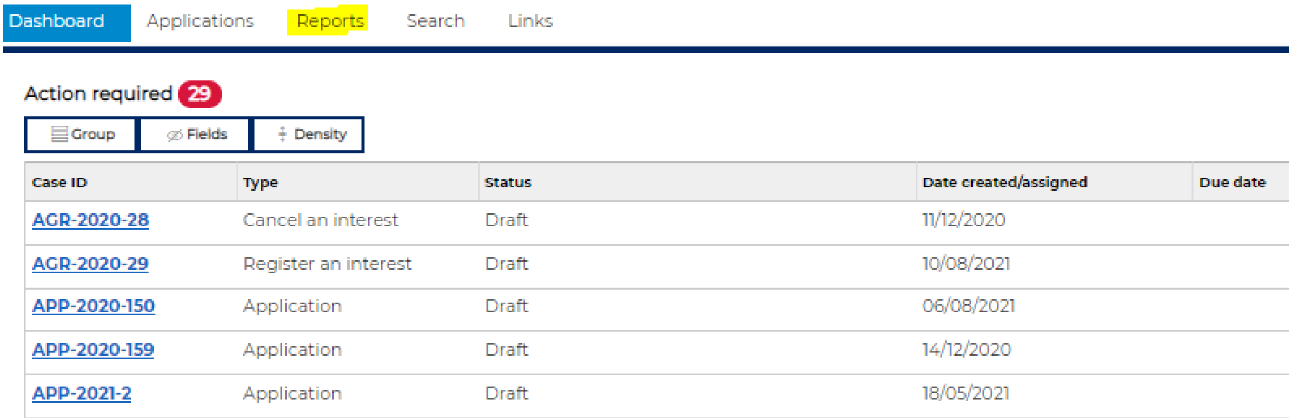
- lodged tab of your dashboard, under actions
- review and declaration screen

- acknowledgement screen
- review screen.

Lodging geological reports

Lodgement of geological reports is facilitated by TMS. A tab is available to differentiate reports from applications.

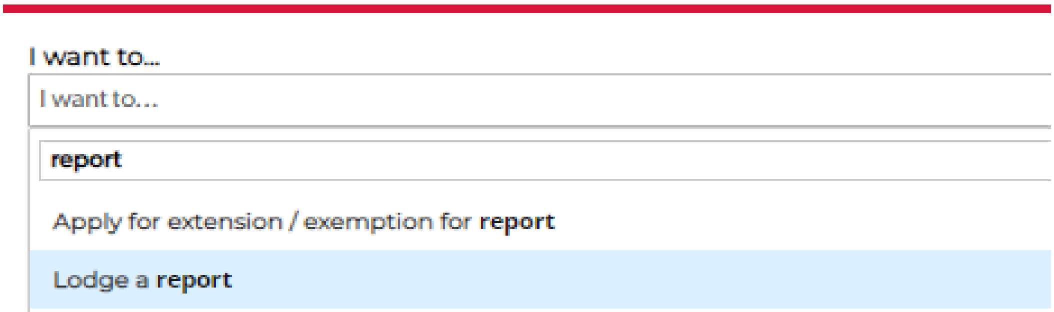
Figure 27 New reports tab



Case ID	Type	Status	Date created/assigned	Due date
AGR-2020-28	Cancel an interest	Draft	11/12/2020	
AGR-2020-29	Register an interest	Draft	10/08/2021	
APP-2020-150	Application	Draft	06/08/2021	
APP-2020-159	Application	Draft	14/12/2020	
APP-2021-2	Application	Draft	18/05/2021	

To lodge a report, you can initiate from the lower left-hand section of your dashboard.

Figure 28 Initiating report lodgement



You will need to select whether the lodgement is for an approved reporting group or a single authority. To locate an approved group search using any Authority ID within the group or search using the group name.

To locate single authorities, search using the Authority ID or the Authority Holder's name.

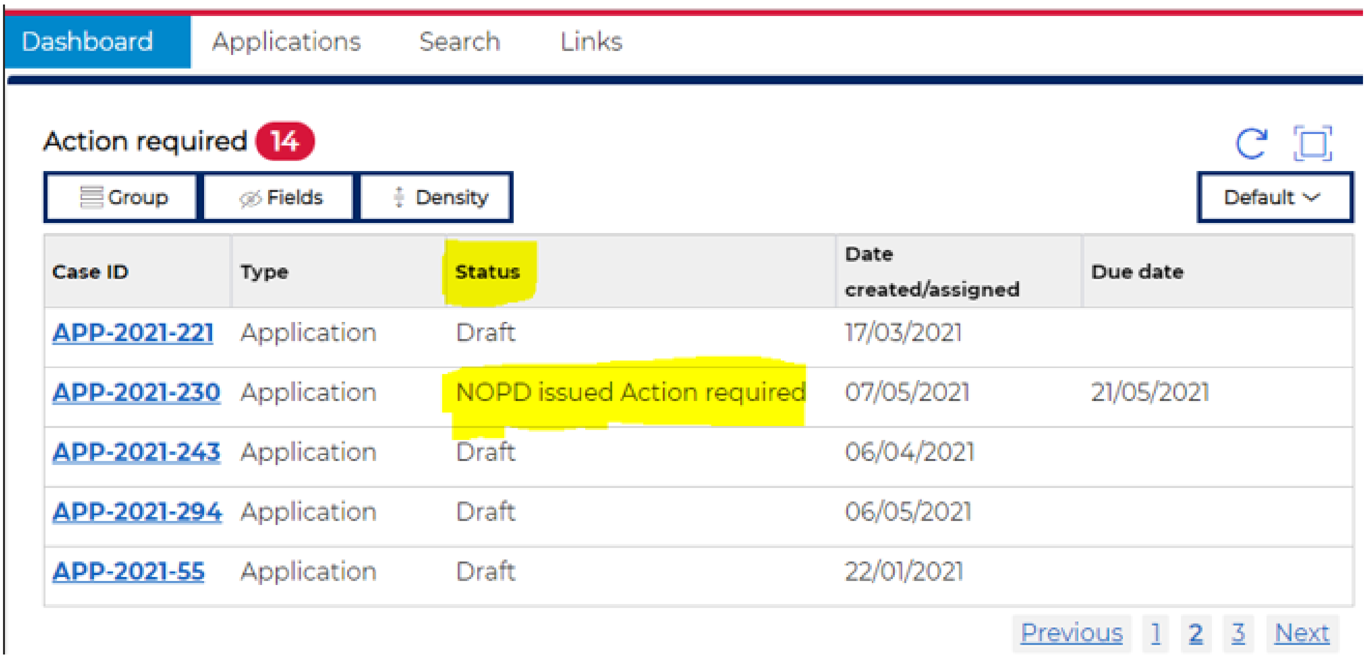
How to respond to actions in TMS

As an applicant, you may be required to respond to actions in TMS.

This can include responding to a Notice of Proposed Decision (NOPD), authorising a profile association or other additional actions.

Your dashboard includes the 'Action required' panel located on the top left corner. The default view includes a 'Status' column showing where action is required.

Figure 29 Action required dashboard



Once the assessment stage is completed on your application, the applicant will be required to consider the NOPD.

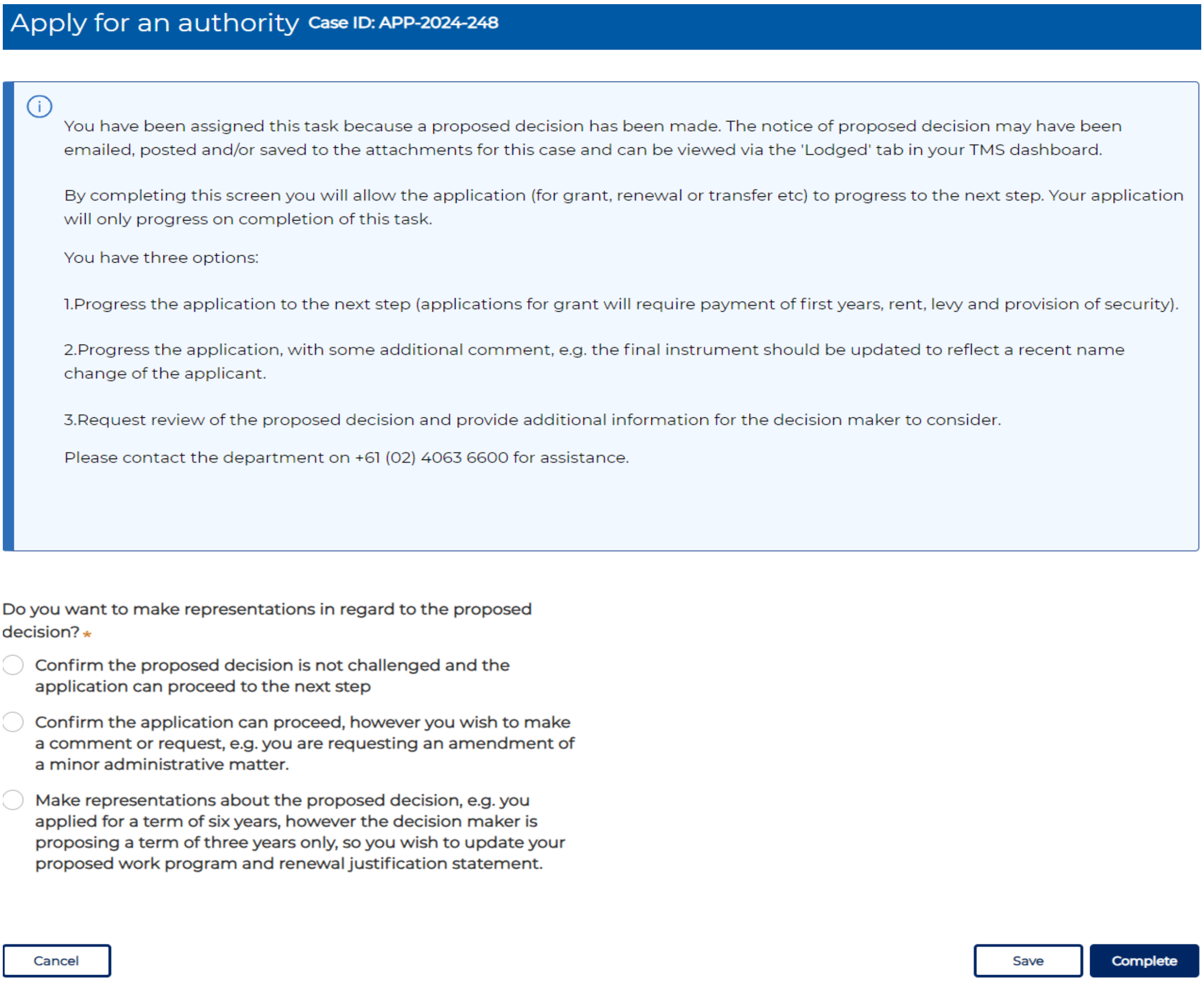
The NOPD is delivered via email. Concurrently, the system will generate an email to notify the applicant contact as specified in the party details screen of your application.

From the ‘Action required’ panel on the dashboard, which displays a status item ‘NOPD Issued – applicant response required’, click on that Case ID link to view the following screen (see screenshot below).

Notice of Proposed Decision

On this Action required by applicant screen, you will see the NOPD response due date.

Figure 30 Screen showing applying for an authority



How to respond

The applicant may either:

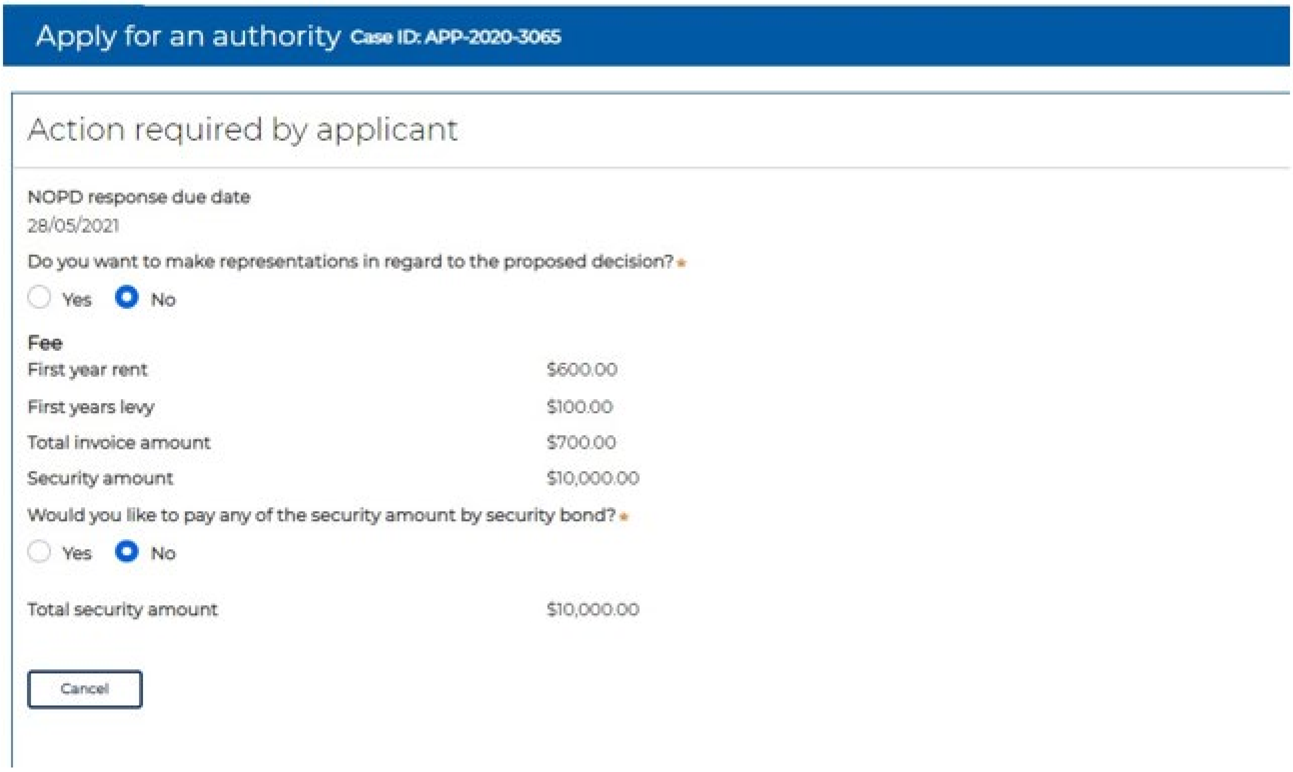
1. Confirm the application should proceed*
2. Confirm the application should proceed, with a comment or request *
3. Make representations, in which case they should supply a response or information to support the request

On selection of the ‘complete’ button the payment details screen will then display (for grants and part-transfer only). See the following for more details.

For a renewal or transfer application, the payment details screen is not applicable.

On this Action required by applicant screen, you will see the NOPD response due date.

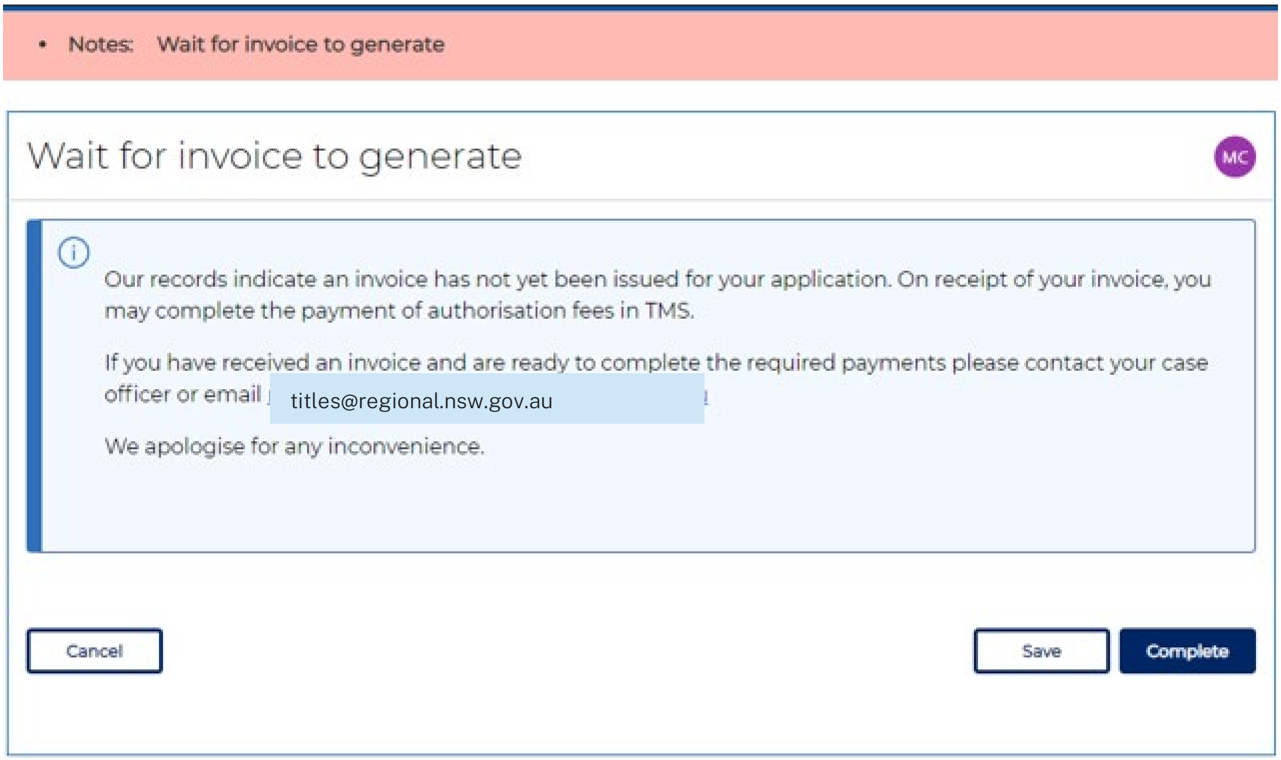
Figure 31 NOPD response due date



Waiting for invoice to generate – applications for grant and part transfer only

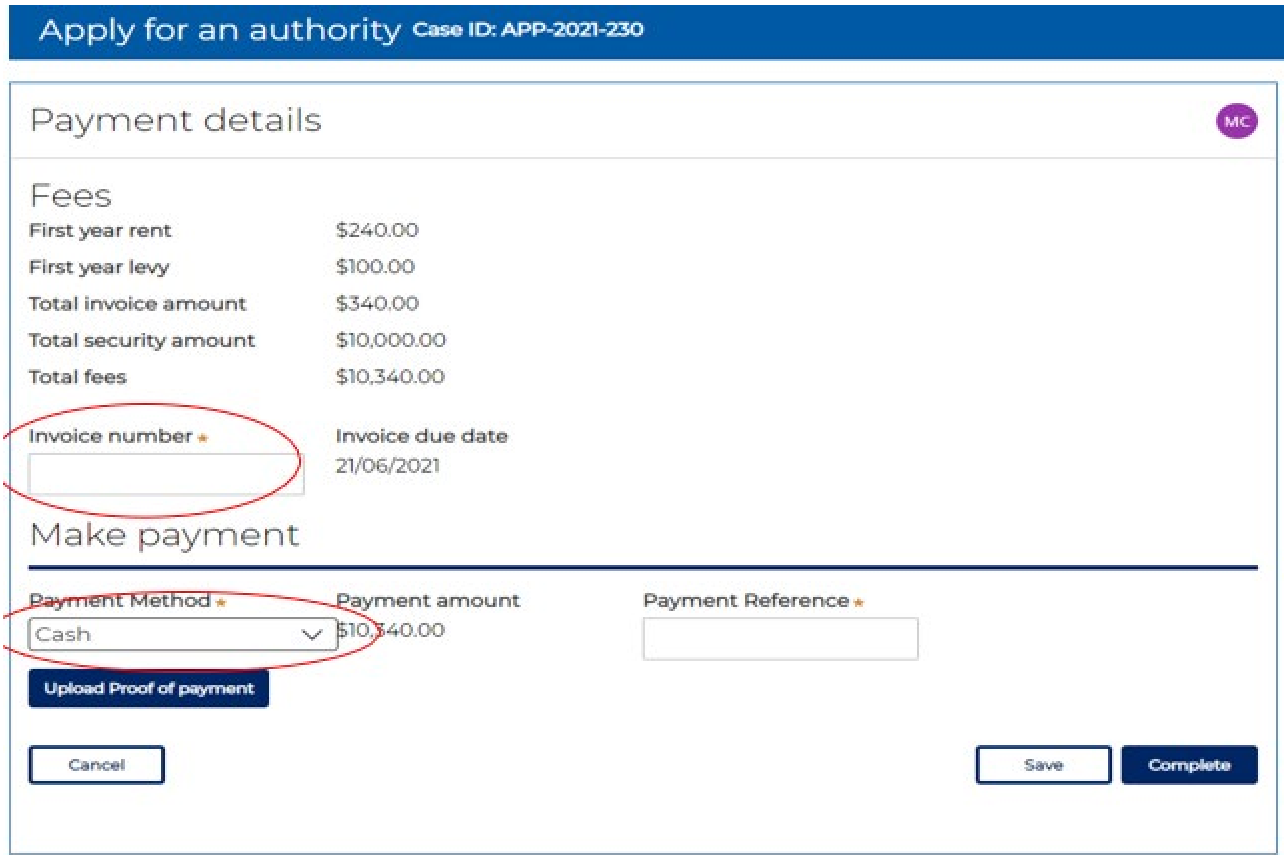
If the following screen displays instead of the payment details, we are still preparing the invoice. You should select the ‘cancel’ button and wait for the email advising the invoice has been issued. You can then select the ‘complete’ button to progress to the ‘payment details’ screen.

Figure 32 Waiting for invoice to generate screen



Payment details

Figure 33 Screen of payment details



Invoice number

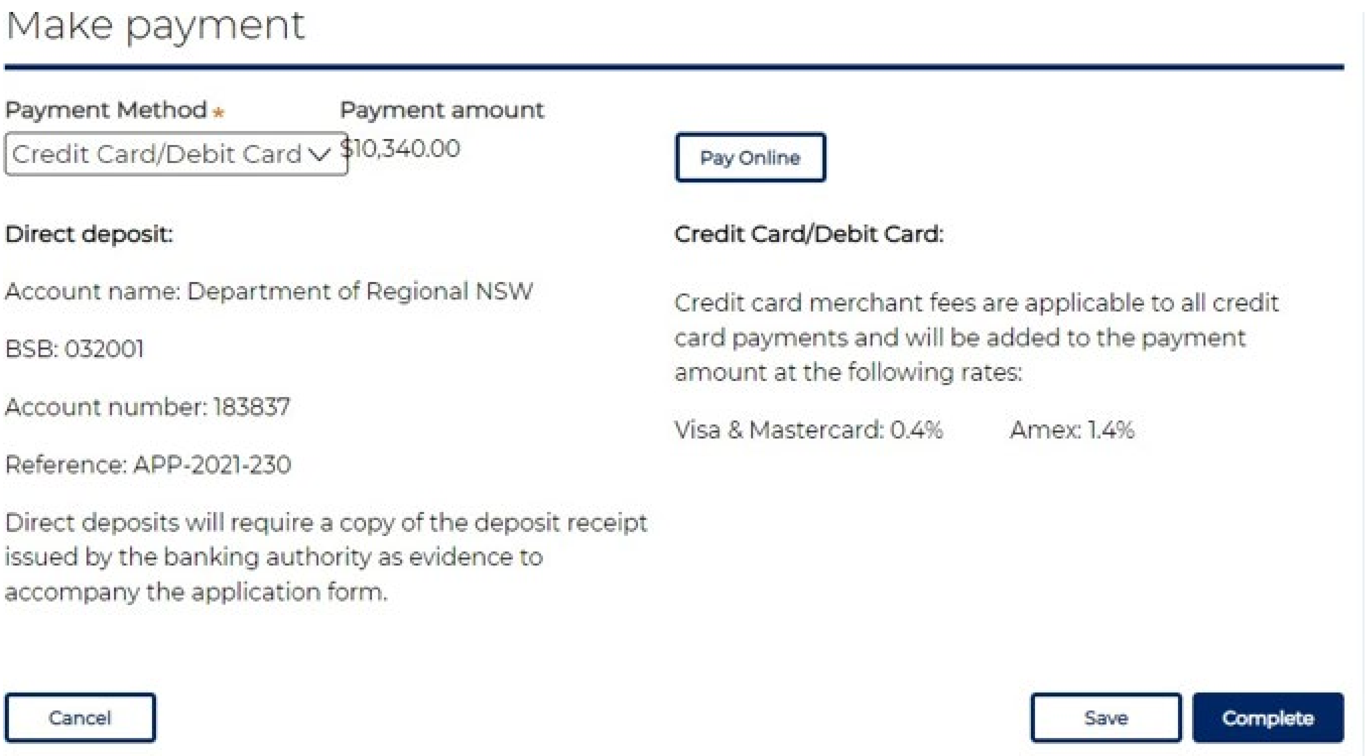
On the 'Payment details' screen, the applicant must insert into the mandatory Invoice number field the number of the Invoice received from the department.

If the accounts department of the applicant has already made payment and informed the applicant contact, please update the screen with the payment details including, the proof of payment.

Making payment

The applicant can then opt for a method of payment, which then expands the screen depending on the method selected.

Figure 34 Making a payment screen



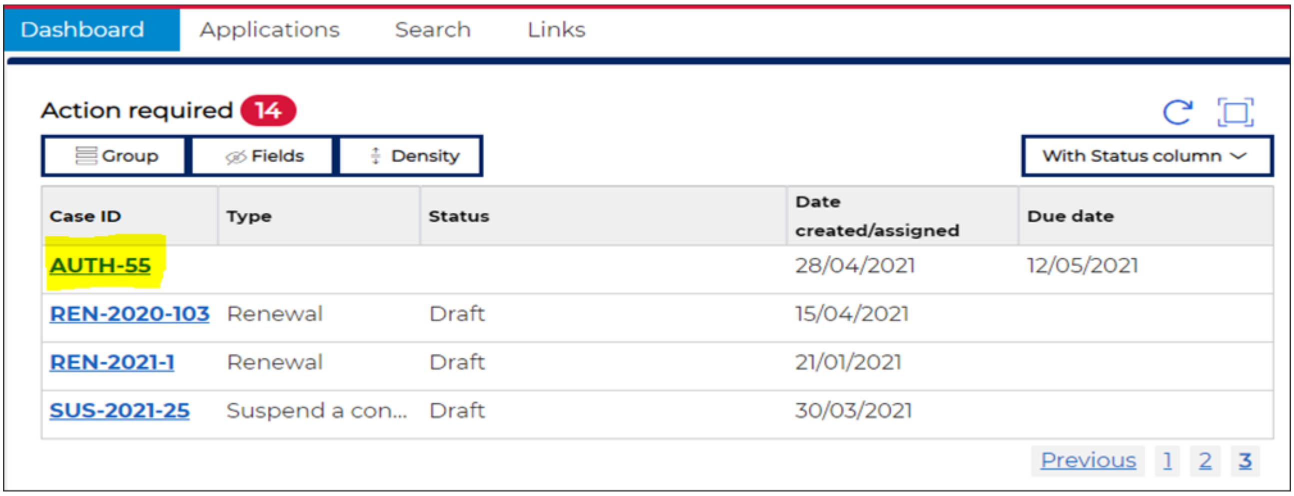
Authorisation association or affiliation for a TMS profile

If you are the TMS account manager for a company profile, you may also receive requests related to the profile in your 'Outstanding Tasks'.

For example, you are the manager/administrator of a company profile, and a colleague makes a request to also be associated with that company profile you manage, ensuring their applications become viewed as part of the portfolio of applications within the company.

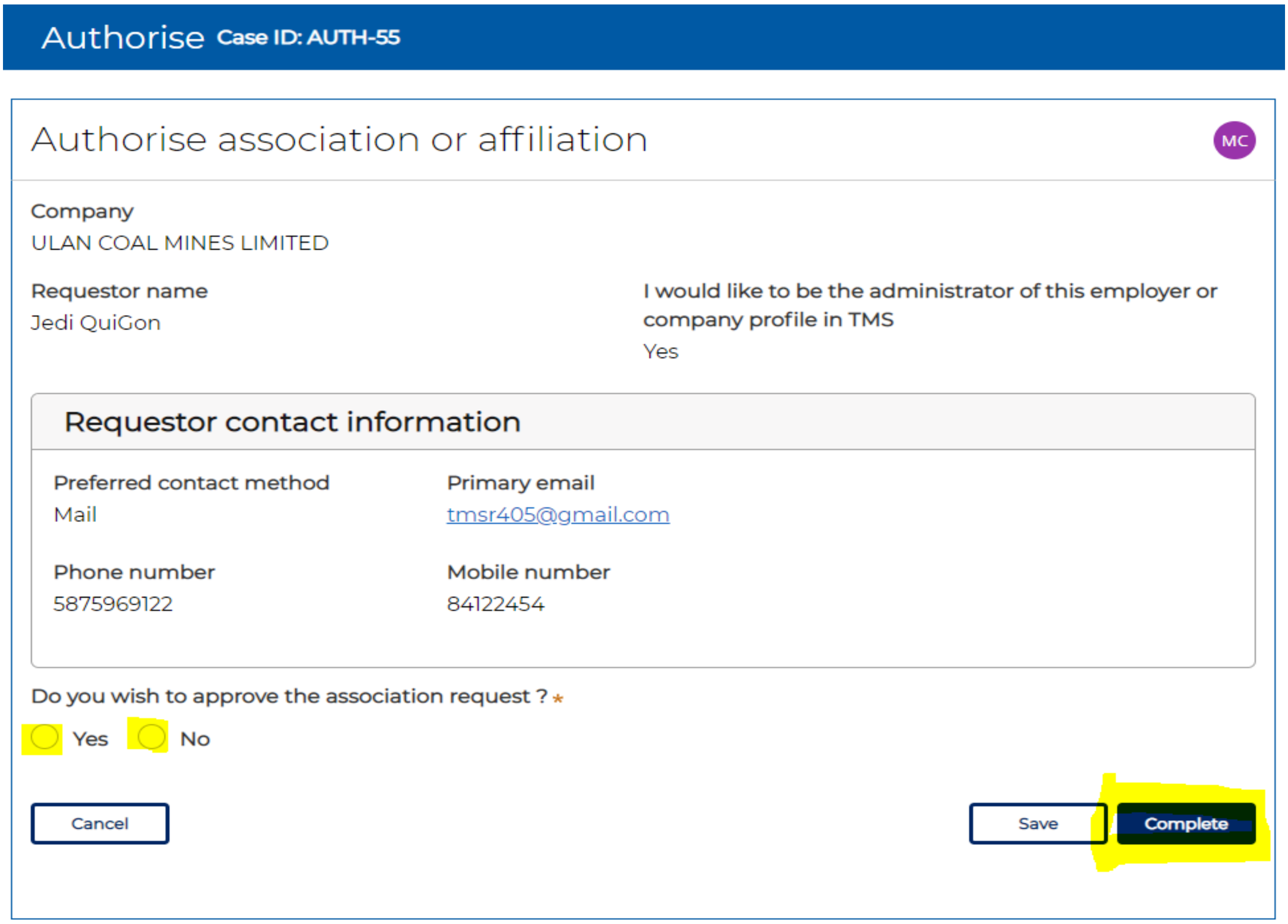
An authorisation action will have an AUTH-XX case ID when it appears on your Action required panel. See the screenshot below.

Figure 35 View association or affiliation for a TMS profile



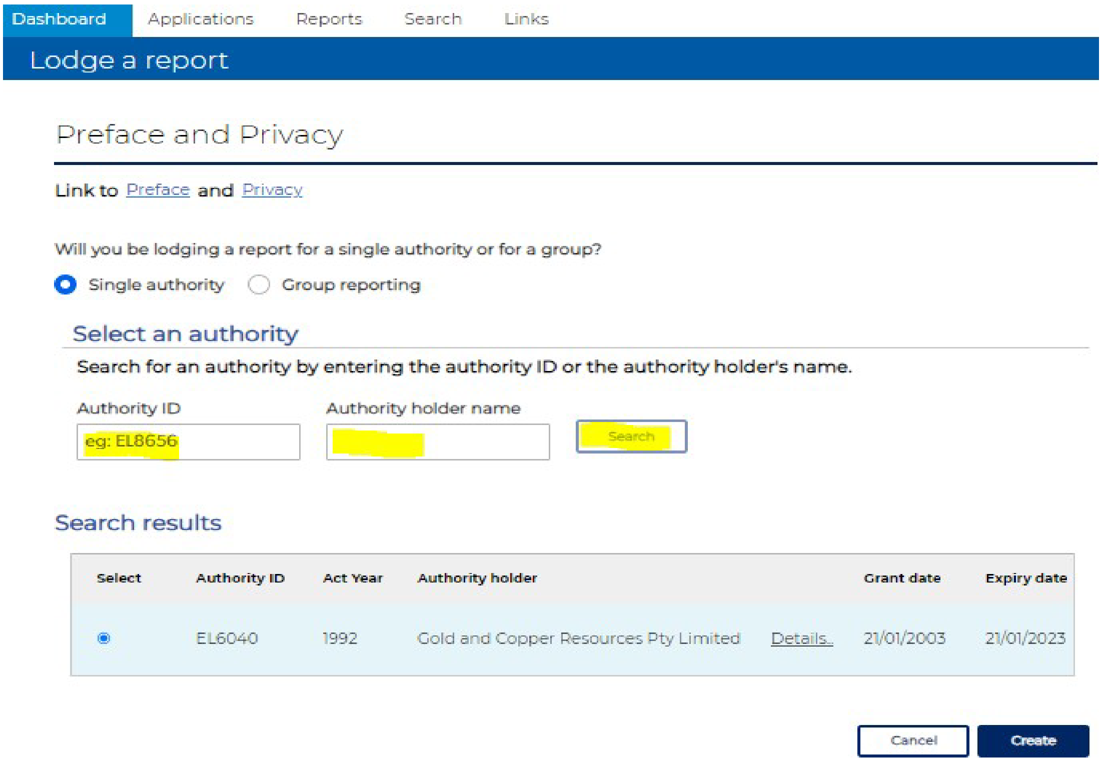
If you agree or disagree with the association or allocation requested by another TMS user, details as shown in the requestor contact information box, select either the 'Yes' or 'No' radio button and then click on Complete to close the request.

Figure 36 Responding to authorisation request



Lodge a report

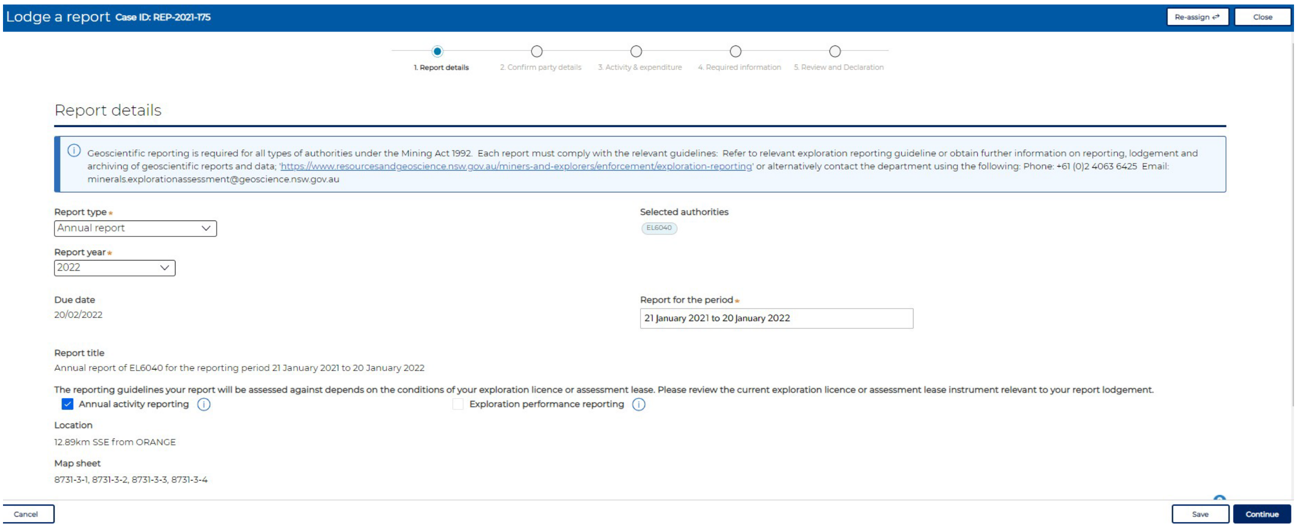
Figure 37 Lodgement preface and privacy screen



Report details

This screen allows you to input summary information about the report.

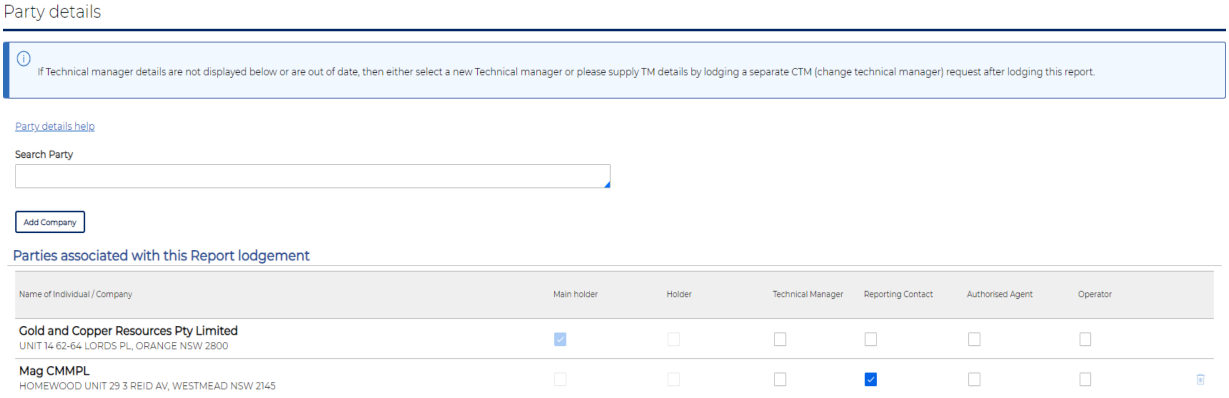
Figure 38 Report details screen.



Confirm party details

This screen allows you to confirm the parties relevant to the lodgement. The logged in user is defaulted to the ‘Report contact’. This may be changes, however only one report contact can exist for each report lodgement. A new technical manager may also be identified on this screen.

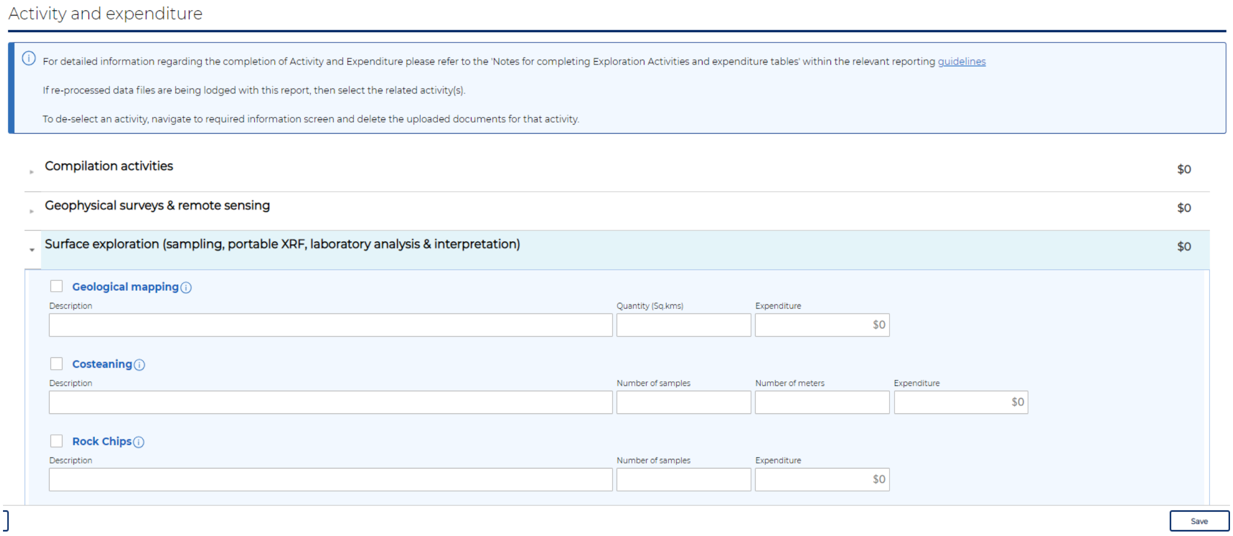
Figure 39 Confirm party details screen



Activity and expenditure

This screen is designed to capture information in a format that supports further analysis. If you prefer to provide this information in a separate document or file, please contact us at mining.explorationassessment@geoscience.nsw.gov.au to discuss alternative options.

Figure 40 Activity and expenditure screen.



Required information

This screen displays the required data that should accompany the report lodgement. For optimal performance, each attachment size is recommended to be of size 250MB or less. Larger files up to 1GB can be attached, however they may take longer to upload.

File can be uploaded individually or bulk uploaded.

Figure 41 Required information screen.

Review and declaration screen

This screen allows you to review all the details you have provided in your report and declare the information is correct.

This screen offers the ability to navigate back through the report if necessary, prior to making payment and completing the application.

Further Information

Help is available

If you have enquiries concerning the authority application process (e.g. the information required to support an application) or using TMS, please contact: titles@regional.nsw.gov.au for assistance.