



## How to Bundle a Submission

<https://www.openfigi.com>

# After a Successful Login:

## Under 'Request' tab > New Submission

## New Submission

Please use the dropdowns below to navigate to the instrument type that you want to fill out. A "Start" button will appear below any choice that has an associated form. If you know the name of the instrument type form you want to submit, you can use the quick search below to find it.

### Select from List

#### Asset Class

3 choices available

Derivatives	>
Fixed Income	>
<b>Funds</b>	>

#### Type

1 choice available

<b>All Funds</b>
<b>Start</b>

### Quick Search


# Bundle Submission

Submission Files

Select or drop attachment documents here

Up to 10 files, accepting .pdf,.xlsx,.xls,.csv,.doc,.docx, total limit 12.0MB.

No file added yet

I'm not a robot   
reCAPTCHA  
[Privacy - Terms](#)

Publish**Publish bundle with multiple Share Class children**

- Select **'Single Submission'**
- Complete all mandatory fields labeled with an asterisk (\*) and attach supporting documents in the 'Attachments' box at the bottom of the page.

**\*\*\*\*The Bundling option should only be used when submitting requests for child instruments, such as multiple share classes of the same fund. Please do not bundle when requesting tickers for Parent instruments, such as multiple sub-funds.\*\*\*\***

- Click the **'Publish bundle with multiple Share Class children'** button.

# Parent Submission

Your parent submission has completed. Your tracking number is 6369139619072311296.

To start a child submission [click here](#).

[Click here to view submission history](#).

\* Launch Price Or Initial Value

\* Initial Value Currency

Security Identifier

# 1

\* Identifier Type

\* Identifier Text

[Remove Security Identifier # 1](#)

[Add Security Identifier](#)

\* Share Class Type

Open End Share Class

Do You Want To Request A Ticker

Requested Ticker

Minimum Investment

Minimum Subsequent Investment

Minimum Investment Currency

Base Management Fee Percent

Management Performance Fee Percent

Front End Load

Redemption Charge Percent

Early Withdraw Charge Percent

- Prompts at the top of the screen will indicate that the 'parent' submission has been completed and has been assigned a tracking number.
- To continue submitting requests for additional share classes of that fund, click '**To start a child submission click here**' from the prompt at the top of the screen.

# Child Submission

Add Security Identifier

\* Share Class Type: Open End Share Class

Open End Share Class

Do You Want To Request A Ticker

Requested Ticker

Minimum Investment

Minimum Subsequent Investment

Minimum Investment Currency

Base Management Fee Percent

Management Performance Fee Percent

Front End Load

Redemption Charge Percent

Early Withdraw Charge Percent

Submission Files

Select or drop attachment documents here

Up to 10 files, accepting .pdf, .xlsx, .xls, .csv, .doc, .docx, total limit 12.0MB.

No file added yet

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[Publish child record](#)

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- Data from the first submission will be imported into a new 'child' submission form. For a product such as Funds, Fund-level fields such as Fund Name, Fund Asset Currency and Country of Domicile will remain fixed to ensure consistency. However, share class-level fields such as ISIN, Share Class Name, Share Class Currency and Base Management Fee will be editable and can be changed appropriately for the new share class.
- Once all data is updated and appropriate attachments are uploaded, click '**Publish child record**'.
- Prompts at the top of the screen will indicate that the 'child' submission has been completed and has been assigned a tracking number.
- To continue submitting requests for additional children of a bundle such as Share Class for Funds, click '**To start another child submission click here**' from the prompt at the top of the screen and repeat the previous steps.

# Staged Child Submission

## Submission History

This page shows a recap of your submission history. Next to each submission are buttons that allow you to either view the full details for a submission or copy the contents of a submission directly to a form to create a new submission similar to this one.

All Submissions Staged Submissions

Submission Time	Email	Security Type	Submission ID	Parent ID	Status	Actions
2016-12-28 08:14		All Funds	6369139619072311296	1 children	Staged	<a href="#">View</a> <a href="#">Add</a> <a href="#">Submit</a>
2016-12-28 08:29		All Funds	6369143398643793920	6369139619072311296	Staged	<a href="#">View</a>
2015-12-09 17:11		All Funds	6226410120229945344	1 children	Staged	<a href="#">View</a> <a href="#">Add</a> <a href="#">Submit</a>
2015-12-11 14:21		All Funds	6227108503387111424	6226410120229945344	Staged	<a href="#">View</a>

If you had submissions for Mutual Funds on the Core Data Portal website, you can migrate them by clicking the button below.

Please note: only completed historical submissions will be migrated, and it is only possible to perform a single migration for the submissions associated with a given email address. Once the migration is performed, you must no longer use the Core Data Portal website.

[Migrate](#)

- If no additional instruments need to be requested at this time, click '**To view and submit the bundle submission click here**' from the prompt at the top of the screen.
- The 'Staged Submissions' tab of the Submission History section will be displayed, with the bundled parent and child submissions.
  1. Click '**View**' to display the information entered for each submission.
  2. Click '**Add**' to begin an additional instrument request which will be added to the bundle. Please note, this is not required if all child instruments have already been requested.
  3. Click '**Submit**' to complete the bundled submission

- END -