



What's New in FlexiCadaastre

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An MS Group Business

What's New in FlexiCadaastre

- Complex Actions
- Roles, Approvals and Notifications
- Check Lists
- Action Series
- Code Generators
- Reporting Tools
- Custom Importers
- Related Licenses, Agreements and Groups

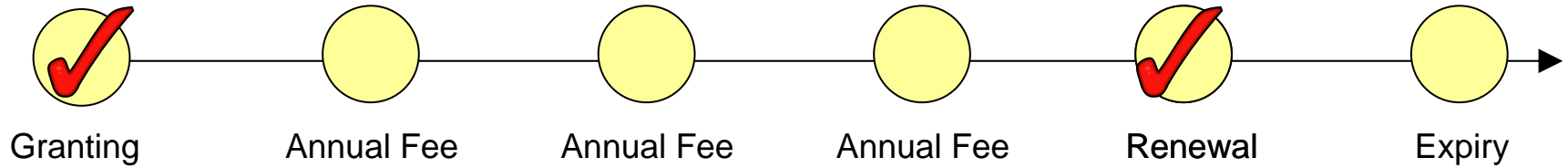
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Complex Actions

- Allows 'multiple step' Actions
- Allows action search page to display key actions only
- Example:
 - Parent Action: *Renewal*
 - Child: *Keep / Drop decision*
 - Child: *Submit Renewal Application*
 - Child: *Receive Renewal Confirmation*
- Like a mini Workflow within an Action

Complex Actions



Complex Actions

- Child Actions are full-fledged Actions
- Child Actions can have:
 - Workflows
 - Notifications
 - Approvals
 - Check Lists

Complex Actions

- Demo

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Roles, Approvals and Notifications

- Individual users associated with Licenses, Agreements, Groups in specific Roles
 - E.g. **'Mike Jones'** is **'Land Manager'** for **'PL1756'**
- Approval responsibility on Actions assigned based on Roles
 - E.g. **'Project Manager'** must approve **'Renewal'** actions
- Notifications for actions sent based on Roles
 - E.g. **'Project Geologist'** receives E-mail 1 month before **'Annual Work Report'** is due

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Check Lists

- Action Types can be configured to require a check list to be completed
- Check list items can be **Required** or **Recommended**
- Useful alternative to complicated Workflows with multiple Actions

Check Lists

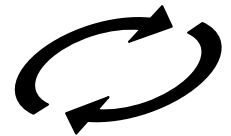
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Action Series

- Allows scheduling of recurring Actions
 - E.g. '**Annual Rent**' of '**\$3/Ha**' due '**Every 1 year**'
 - E.g. '**JV Partner Meeting**' due '**Every 1 quarter**'
- Allows editing of individual Actions
 - E.g. 1 Meeting is rescheduled
- Allows editing of entire series
 - E.g. Annual Rent goes up
- Actions that are part of a series are indicated with:



Action Series

- Demo

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Code Generators

- Automatically assign Codes for Licenses, Agreements, Groups and Actions
- Configurable templates
 - E.g. License Codes:
 - [License|License Type Code]_[License|Unique Number]/[License|Date Applied|yyyy]
 - PP_235/2007
 - E.g. Agreement Codes:
 - [Agreement|Type Abbreviation]-[Agreement|Unique Number]-[Agreement|Date Started|ddMMMyyyy]
 - JV-14-07Sep2007
 - E.g. Action Reference Codes:
 - [Action|License|License Type Code]/[Action|Date Due|MMyy]/[Action|Unique Number]
 - PP/0607/173

Code Generators

- Demo

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Reporting Tools

- Terminology:
 - **Search:** Criteria for returning a list of items
 - E.g. Open Payment Actions due in the Next 60 Days
 - **Saved Search:** Saved to FlexiCadastre for reuse
 - E.g. “Payments – 60 Days”
 - **Report Schema:** Definition for look and feel of a report
 - Fields, Sorting, Grouping etc.
 - E.g. “Payments (Detailed)”
 - **Report:** Combination of Report Schema and Data
 - E.g. “Payments – 60 Days” + “Payments (Detailed)”
 - **Saved Report:** Saved to FlexiCadastre for reuse
 - E.g. “Payments – 60 Days (Detailed)”



Reporting Tools

- How do I create a Report?
- 2 Starting points:
 - Reports menu item
 - Open a saved report
 - Define a new report (Schema + Data)
 - Optionally save report
 - Search interfaces (Licenses, Agreements, Actions etc.)
 - Run a search (or saved search)
 - Select records for reporting
 - Click report icon
 - Select a Report Schema

Reporting Tools

- Report Schemas
 - Word Document Templates
 - Word Document with Tags
 - Client defined & maintained
 - Crystal Reports
 - Standard: Bundled with FlexiCadaastre
 - Custom: Designed and built for a specific client

Reporting Tools

- Saved Reports can be scheduled for automatic distribution via email

Reporting Tools

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Custom Importers

- Capturing multiple licenses through the [New License Wizard](#) can be Laborious
- Built-in Importer exists for both Attribute and Spatial Data
- Fixed format for import template
- Some clients receive data in other formats
 - E.g. Details of claims staked by contractors
 - E.g. Data supplied by Government Institutions
- Custom Importers allow these datasets to be imported directly
- Designed and built specific to a client
- Importer plug-in framework allows custom importers without impacting any other clients

Custom Importers

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Related Licenses, Agreements and Groups

- Originally:
 - **Licenses** linked to **Agreements & Groups**
 - E.g. A Mining Right is part of a Joint Venture Agreement
 - **Agreements** linked to **Licenses & Groups**
 - e.g. A Confidentiality Agreement is part of a Project
 - **Groups** linked to **Licenses & Agreements**
 - E.g. A Project consists of several Prospecting Licenses

Related Licenses, Agreements and Groups

- License – License
 - E.g. **Site License** linked to **Retail License**
- Agreement – Agreement
 - E.g. **Original Agreement** linked to **Amending Agreement**
- Group – Group
 - E.g. **Reporting Group** linked to **Project**
- Directional Relationship Types
 - E.g.
 - Agreement 1 **is amended by** Agreement 2
 - Agreement 2 **amends** Agreement 1

Related Licenses, Agreements and Groups

- Demo