



Notifications, Escalations & Approvals

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An MS Group Business

Notifications & Approvals – Getting Started

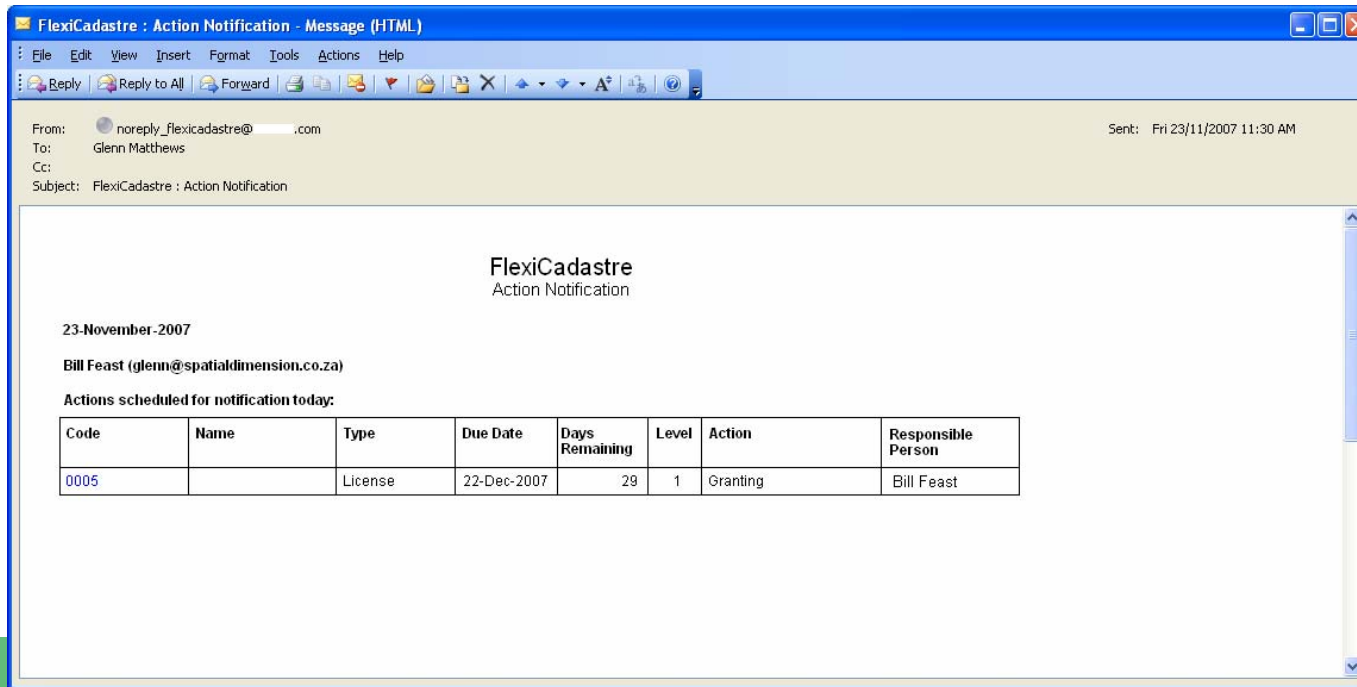
- The first step in effectively setting-up and managing your Notifications & Approvals in Flexicadastre is to configure the User Roles.
- Roles are modeled on the organisational structure of the Company (or Government Department) with Roles added into FlexiCadastre for those positions that require interaction with the system.
- Roles are used to assign responsibility for an Action or an Approval and are configured on an individual Action Type basis.
- Users are assigned to their Roles on either a Licence, Agreement or Group basis and then inherit the responsibility of any Actions or Approvals associated with the License/Agreement/Approval.

Notifications – The Basics

- Generally used as a reminder that a task, or “Action” in FlexiCadaastre is approaching its due date.
- FlexiCadaastre pushes the notifications out to users based on the Roles assigned to the License, Agreement or Group for which the Action is associated.
- Notifications can be sent out in the form of an Email or an SMS (cell-phone text message), or both.
- FlexiCadaastre can be configured to cater for multiple levels of Notification, effectively escalating the notifications up to higher levels of responsibility in your organisation.

Action Notification Email - Example

- Clicking on the “Code” hyperlink (if already logged into FlexiCadastré) will take to user direct to that Action. (If not logged in, the FlexiCadastré login screen will open – after entering your details you will then be taken to the Action)



The screenshot shows an email client window titled "FlexiCadastré : Action Notification - Message (HTML)". The email header includes:

- From: noreply_flexicadastre@... .com
- To: Glenn Matthews
- Cc:
- Subject: FlexiCadastré : Action Notification
- Sent: Fri 23/11/2007 11:30 AM

The main body of the email contains the following text:

FlexiCadastré
Action Notification

23-November-2007

Bill Feast (glenn@spatialdimension.co.za)

Actions scheduled for notification today:

Code	Name	Type	Due Date	Days Remaining	Level	Action	Responsible Person
0005		License	22-Dec-2007	29	1	Granting	Bill Feast

Escalating Notifications

- Notifications can be configured as a system wide setting for any number of escalation levels required. Every Action Type in FlexiCadaastre can then be set-up, allocating a different role (or roles) to each level.
- For example, when there are five levels - Level 1 is the furthest away from the Action's due date and Level 5 is the closest to the Action's due date.
- When the final notification level has been reached, FlexiCadaastre can also be configured to send out daily email notifications, until such time the Action has been closed.

Setting Up Notifications

- Notifications on Actions must be configured on each individual Action Type, which allows every FlexiCadastre Action Type to have its own unique reminder settings.
- The system defined “Number of Notification Levels” will be available on all Actions, however it is not mandatory to use all levels.
- If an Action does not require all levels of notification, simply use up to the level you require. Even if you only use the first two notification levels, FlexiCadastre is able to still send the final notification daily (in this case the final level being 2).

Setting Up Notifications - Example

FlexiCadastrre -A-Big-Mining-Company User: FlexiCadastrre ADM
Version:2.2.1 (Development) Database:2.2
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License Search [Admin Tools](#) > [Action Types](#) > View EDIT

Home
Diary
Regions
CRG
Licenses
Actions
Approvals
Companies
People
Agreements
Documents
Map
Reports
My Settings
Admin Tools
Help
Legal
Logout

Action Type Name: **Payment: Rent**

General | **Approvals** | Notifications | Reference Template | Check List Items | Interface Customisation

Default Notification Levels

Notification Level	Unit	Interval	Before/After Due Date
Level 1	1	Months	Before
Level 2	2	Weeks	Before
Level 3	5	Days	Before
Level 4	0	Days	Before
Level 5	1	Days	After

Default Role Distribution

Role	Level 1	Level 2	Level 3	Level 4	Level 5
Database Administrator					
General Manager				SMS	SMS
Land Manager					
Project Geologist					
Resource Development Manager					
Resource Manager					
Senior Geologist					
Surveyor					
System Administrator					
Tenure Co-ordinator		E-Mail	E-Mail	E-Mail	E-Mail
Tenure Manager				E-Mail	Both
Tenure Officer	E-Mail	E-Mail	E-Mail	E-Mail	E-Mail

Step 1: Define Relative Date/Time Interval of Notifications, either before or after the due date

Step 2: Allocate Roles to each Notification Level

How Can I view Notifications on an Action?

FlexiCadastrre - Microsoft Internet Explorer

Address: http://localhost/FlexiCadastrre/Flexicadastrre.htm

User: FlexiCadastrre ADMIN
Version: 2.2.1 (Development) Database: 2.2.1
Copyright: © Spatial Dimension 2005 - 2007

License Search

Actions > Edit > Payment <-- EDIT -->

License Code:	E41/12345	License Type:	E	Owners:	WA Pty Ltd (50)
License Name:	West Australia 1	Status:	Active	Expiry Date:	01/02/2009

[Action](#) | [Approval](#) | [Check List](#) | [Child Actions](#) | [Documents](#) | [Notification](#)

Default Notification Levels

Notification Level	Notification Date
Level 1	01/01/2008
Level 2	18/01/2008
Level 3	27/01/2008
Level 4	01/02/2008
Level 5	02/02/2008

Default Role Distribution

Role	Level 1	Level 2	Level 3	Level 4	Level 5
Database Administrator					
General Manager				SMS	SMS
Land Manager					
Project Geologist					
Resource Development Manager					
Resource Manager					
Senior Geologist					
Surveyor					
System Administrator					
Tenure Co-ordinator		E-Mail	E-Mail	E-Mail	E-Mail
Tenure Manager				E-Mail	Both
Tenure Officer	E-Mail	E-Mail	E-Mail	E-Mail	E-Mail

Done Local intranet

Viewing Notifications on Homepage

FlexiCadastré - Microsoft Internet Explorer

Address: http://localhost/FlexiCadastré/Flexicadastré.htm

User: FlexiCadastré ADMIN
Version:2.2.1 (Development) Database:2.2.1
Copyright:© Spatial Dimension 2005 - 2007

FlexiCadastré - A Big Mining Company

License Search

- Home
- Diary
- Regions
- CRG
- Licenses
- Actions
- Approvals
- Companies
- People
- Agreements
- Documents
- Map
- Reports
- My Settings
- Admin Tools
- Help
- Legal
- Logout

Home

License Summary

License Type Group	Application	Active	Inactive
Mining	744	10	32
Exploration	78	83	126
Competitor	0	0	0
Other	16	103	5

Action Summary

Actions	All Actions	My Actions
Overdue:	431	12
Due today:	14	6
Due this week:	20	6

What's new in FlexiCadastré

What's New

- Approvals functionality on actions
- Complex/child actions implemented to simplify workflows
- Customizable ownership types on licenses
- Improved notification functionality including SMS
- Log of all emails sent from FlexiCadastré
- New Projected Co-ordinate System functionality
- Tax fields added to payments
- Work commitment interface improved

My Searches

Name	Search Type
90 Day Payments	Action
Application	License
crg	License Group

All Notifications ([Today's Notifications](#))

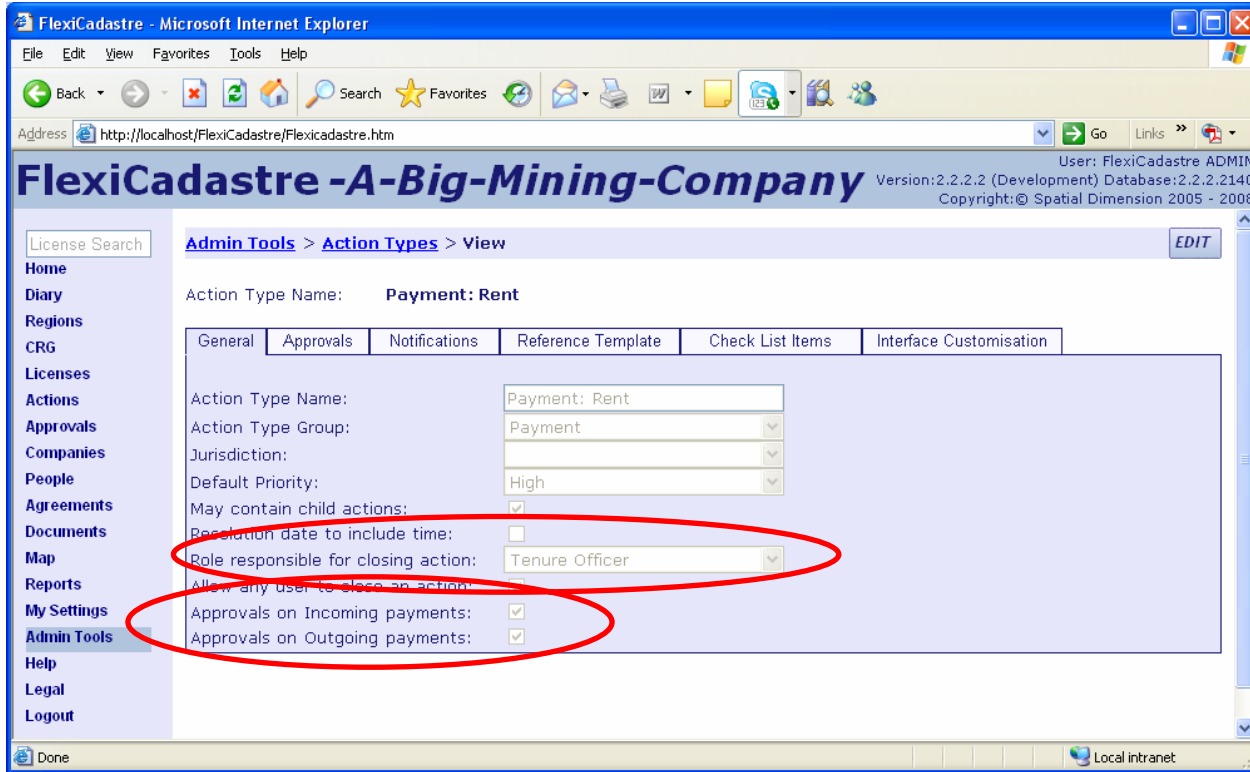
Code	Type	Date Due	Level	Action
E41/12345	License	31/10/2007	2	Lodge: Shire Rates Payment
E40/00001	License	31/10/2007	2	Lodge: Shire Rates Payment
E41/12345	License	01/02/2008	2	Extension of Term
E41/12345	License	01/02/2008	2	Extension of Term
E41/12345	License	01/02/2008	2	Extension of Term
E40/00001	License	01/02/2008	2	Extension of Term
E40/00001	License	01/02/2008	2	Extension of Term
E40/00001	License	01/02/2008	2	Extension of Term
E40/00001	License	01/02/2008	2	Extension of Term
E41/12345	License	31/10/2007	4	Shire Rates
E40/00001	License	31/10/2007	4	Shire Rates

My Filters

Approvals – The Basics

- Approvals can be thought of as a “Sign-Off” or a “Confirmation” to complete a task...or as a “Permission” to proceed with an Action.
- The Approval is configured so that the Responsible Person for the task cannot close the Action until Sign-Off (or Approval) has been completed by another user/s (usually by someone more senior).
- Similar to Notifications, Approvals are configured on any Action Type basis and may consist of multiple Approvals if required.

Setting Up Approvals



Each Action requires a Role Responsible for closing the Action.

For Payment & Communication Action Types, there is the option to apply the approvals based on the direction of payment or communication

Setting Up Approval

- Each Approval needs to be assigned to a Responsible Role
- If multiple levels of Approval are required in a particular order, add further Approvals and assign the “Order”.
- The approval may be in the form of a “Comment” required or an “Approval”.

FlexiCadastré - Microsoft Internet Explorer

Address: http://localhost/FlexiCadastré/Flexicadastré.htm

User: FlexiCadastré ADMIN
Version: 2.2.2.2 (Development) Database: 2.2.2.214
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Admin Tools > Action Types > View

Action Type Name: **Payment: Rent**

Default Approvals for this Action Type

Order: 2 (optional)

Type: Comment

Role: Approval Manager

Notify next:

There are 2 approvals in the list.

Del.	Edit	Order	Type	Role	Prior Status	Notify next
		1	Approval	Tenure Manager		<input checked="" type="checkbox"/>
		2	Approval	Land Manager		<input checked="" type="checkbox"/>

Approval Notification Emails

FlexiCadastré - Microsoft Internet Explorer

Address: http://localhost/FlexiCadastré/Flexicadastré.htm

FlexiCadastré - A Big Mining Company

User: FlexiCadastré ADMIN
Version: 2.2.2.2 (Development) Database: 2.2.2.2140
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License Search

Admin Tools > Action Types > View

Action Type Name: **Payment: Rent**

General | Approvals | Notifications | Reference Template | Check List Items | Interface Customisation

Default Approvals for this Action Type

There are 3 approvals in the list.

Order	Type	Role	Prior Status	Notify next
1	Approval	Tenure Manager		<input checked="" type="checkbox"/>
2	Approval	Land Manager		<input checked="" type="checkbox"/>
2	Comment	General Manager		<input checked="" type="checkbox"/>

- For multiple Approvals, FlexiCadastré provides “Notify Next” functionality that may be used to notify the next person of an Outstanding Approval.
- For the final Approval role in the list the “Notify Next” functionality will then email the Responsible Role for that Action.

Closing Approvals on Actions

- When a user has a single Approval to undertake, FlexiCadastré allows the user to close the Approval via the Actions Open tab on each License or Agreement, or by clicking on Approvals in the left hand side menu

The screenshot shows the FlexiCadastré web application interface. The browser title is 'FlexiCadastré - Microsoft Internet Explorer'. The address bar shows 'http://localhost/FlexiCadastré/Flexicadastré.htm'. The page title is 'FlexiCadastré - A-Big-Mining-Company'. The user is identified as 'FlexiCadastré ADMIN'. The version is '2.2.1 (Development)' and the database is '2.2.1'. The copyright is '© Spatial Dimension 2005 - 2007'. The left sidebar contains a navigation menu with items: License Search, Home, Diary, Regions, CRG, Licenses, Actions (highlighted), Approvals, Companies, People, Agreements, Documents, Map, Reports, My Settings, Admin Tools, Help, Legal, and Logout. The main content area shows the 'Actions > Edit > Communication' path. There are 'SAVE' and 'CANCEL' buttons. The license details are: License Code: E41/12345, License Type: E, Owners: WA Pty Ltd (50), License Name: West Australia 1, Status: Active, Expiry Date: 01/02/2009. The 'Approvals' tab is selected, showing an 'Approval Summary' with a yellow warning icon and the text 'Outstanding Approvals'. Below this, there are 'OK' and 'CANCEL' buttons. The user is 'FlexiCadastré ADMIN'. The approval status is shown with a yellow warning icon, a green checkmark, and a red X icon. The date is '04/04/Approved'. There is a comment field. The 'Prior Approvals' section shows 'none'. A table lists the approvals:

Del.	Edit	Approval Type	Role	User	Status	Prior Status
X		Approval	Tenure Manager			-
X		Approval	Land Manager			Awaiting Approval

Bulk Closing Approvals on Actions

- The Approvals Menu can also be used when there are multiple Approvals to close. The user can search for, and then Bulk Close the Approvals for which they are assigned.

FlexiCadaastre - Microsoft Internet Explorer

Address: <http://localhost/FlexiCadaastre/Flexicadaastre.htm>

FlexiCadaastre - A Big Mining Company

User: FlexiCadaastre ADMIN
Version: 2.2.1 (Development) Database: 2.2.1
Copyright: © Spatial Dimension 2005 - 2007

License Search

[Action Approvals > Search](#) [Clear Search Criteria](#)

User: Action Type Group:

Status: Action Type:

Group: Role:

Code: Action Status:

Absolute Dates Relative Dates

Due: From: To:

SEARCH SAVE

There are 4 approvals in the list. Extract: Tools:

All	Edit	Code	Approval Type	Role	User	Status	Prior Status
<input type="checkbox"/>		E41/12345	Approval	Land Manager	FlexiCadaastre ADMIN		-
<input type="checkbox"/>		E41/12345	Approval	Tenure Manager	Jim Browne		-
<input type="checkbox"/>		E41/12345	Approval	Project Geologist	Dave Young		-
<input type="checkbox"/>		E41/12345	Approval	Project Geologist	Dave Young		-

1

Local intranet

Demonstration

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