



flexicadastre

Governance - Risk - Compliance



Overview of Tasks, Templates, and the Homepage



*FlexiCadastre NAM Regional User Conference, Denver
April 13th – April 14th, 2015*



spatial dimension

Tasks

Common Tasks

Admin Tools > Application Settings > Tasks > Search

[New Search](#)

Name:

Type:

- Add a License
- Add an Agreement
- Edit Existing Action
- Schedule New Action

SEARCH



Description:



Templates

Available templates

Templates

License Templates

Agreement Templates

Group Templates

Configurable Homepage

You are currently in widget layout mode. It is possible to move an existing widget from one zone to another by dragging the widget. To add a new widget check the required widget on the right, select a zone where widget(s) must be added to and click ADD. To remove a widget, click the 'Remove' icon of the particular widget. To configure a widget, change to 'Configure' mode.

First Wide Zone

Recently Accessed

Recently Accessed

There are **18** Results in the list.

1 2 3 4

Type	Name	Description
Agreement	Cigar Lake Operation (JV-2013-004)	Joint Venture, Active
Agreement	Clearwater West Option Agreement (OA-2014-001)	Exploration, Active
License	CHUCHI (1000775)	British Columbia, British Columbia: Mineral Claim, Active
Agreement	McClellan Lake Operation (JV-2013-001)	Joint Venture, Active
License	88632	Quebec, Quebec: Mineral Claim, Active

1 2 3 4

Available Widget Types:

- Action Statistics
- License Search
- License Statistics
- My Reports
- My Searches
- Notifications
- Recently Accessed
- Search Summary
- Tasks

Add to: First Wide Zone ADD

First Left Zone

License Statistics

License Summary

License Type Group	Application	Active	Inactive
Claims	0	1884	92
Leases	0	0	0
Patents	0	0	0
Permits	0	0	0

First Right Zone

Search Summary [2]

Search Summary

	Open Actions Due	Work Commitments	Payments	Reports
30 Days	336	12	12	301
60 Days	1,007	328	329	325
90 Days	1,053	353	337	329
Overdue	4	2	2	0

Second Wide Zone

Template Configuration

Group Templates are a NEW addition

All Tabs on License / Agreement / Group details can be pre-configured

Code = Template Identifier

Template is available on NLW / BNLW / Tasks

Can be modified later – only affects new records



DEMO

Task Configuration

All tasks



- Give task a name
- Description
- Choose task type
- Rest of setup depends on task type



Add New License / Agreement Task

Add a License or Agreement

- Create using NLW or NAW
- Choose appropriate template
- Save – the task is now available to use on any users homepage

Tasks > Add  

Name:

Description:

Type:

Add a License

Create using:

Template:

Edit Existing Action

Before you start, setup and save appropriate searches

Choose if action is associated with Licences, Agreements or one of the Group Types

- Define appropriate license/agreement/group by selecting your own or system *saved search*
- Add an Instruction (optional)
- Choose which action to edit. This is based on a *saved action search* (own or system)
- Choose
 - Allow user to select the action to edit
 - Use the action with the earliest due date

DEMO

Schedule New Action

Single Action or Action Series

Choose if action is associated with Licences, Agreements or one of the Group Types

- Define appropriate license/agreement/group by selecting your own or system *saved search*
- Choose which action to add based on Jurisdiction, Action Type Group and Action Type
- Pick a due date (varies depending on license, agreement or group)
- Add an Instruction (optional)

DEMO

Adding Tasks to your Homepage

Start homepage configuration 

Insert Task into a homepage zone

Go into Configure mode

Edit: Mode:

Setup Task Widget

Name Your Task Widget and
add your Tasks

Available Widget Types:

<input type="checkbox"/>	Action Statistics
<input type="checkbox"/>	License Search
<input type="checkbox"/>	License Statistics
<input type="checkbox"/>	My Reports
<input type="checkbox"/>	My Searches
<input type="checkbox"/>	Notifications
<input type="checkbox"/>	Recently Accessed
<input type="checkbox"/>	Search Summary
<input checked="" type="checkbox"/>	Tasks

Add to:

DEMO

Setting Up Search Summary Grids

Before you start, setup and save appropriate searches

- Actions
- Action Approvals
- Licenses
- Agreements
- Groups

Each summary result value will be a link to a full search result determined by the column search, refined by the associated row date range or search.

Search results for invalid row/column combinations will be shown as - (hyphen).

Filter rows using:

- Date ranges Saved searches

Grid columns are always saved searches

Grid rows can be either date ranges, or saved searches

Setting Up Search Summary Grids

Columns can contain a mix of Search Types

Date filtered rows – dates used relative date ranges

- Relative date ranges can be edited in Admin Tool – Lookup Tables

Search filtered rows – searches will act as an additional filter of the column statistics

- Columns might be active Active Licences by Type
- Rows might be search of Actions due next 90 days by Type

DEMO

Questions

