

Presented by:
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What's New?

Business Rules and Workflows

Overview

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Structured Data - v7.3

Make use of Structured Data in business rules / workflows

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Shape Lengths in Business Rules - v7.2

Use Shape Length attributes in business rules / workflows

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Re-ordering Vertices - v7.2

Accurately re-order shape vertices according to client requirements

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Holiday Calendar - v7.0

Lookup table to accurately schedule on a Working Day



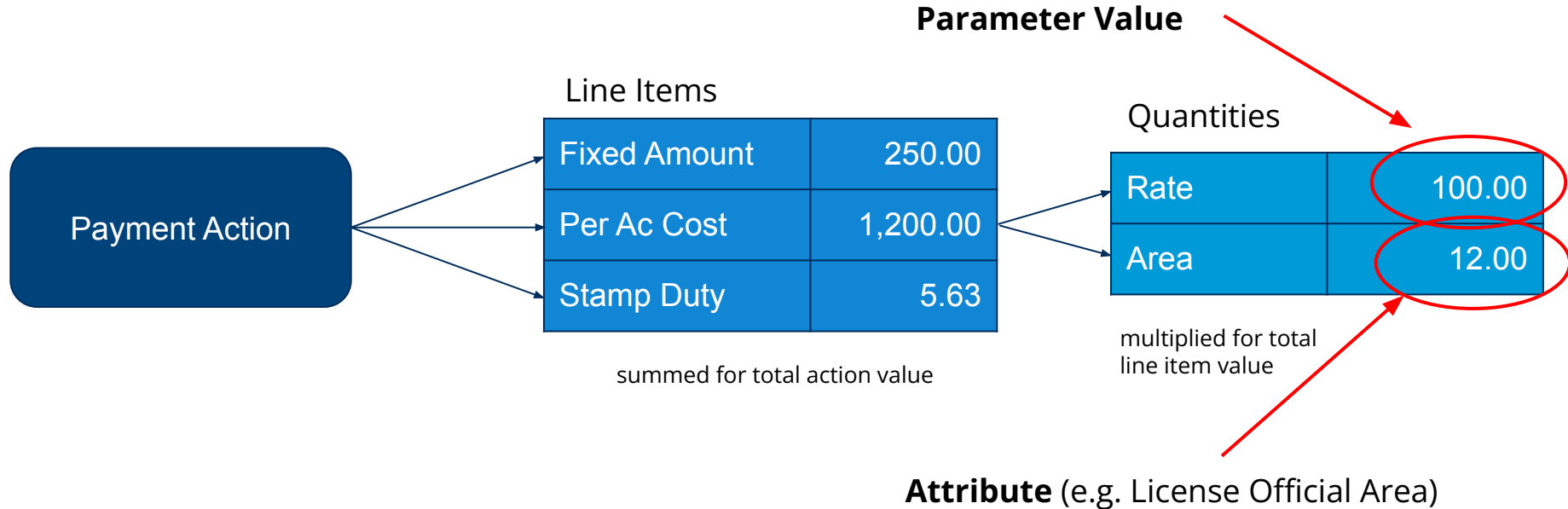
Structured Data



New with Structured Data

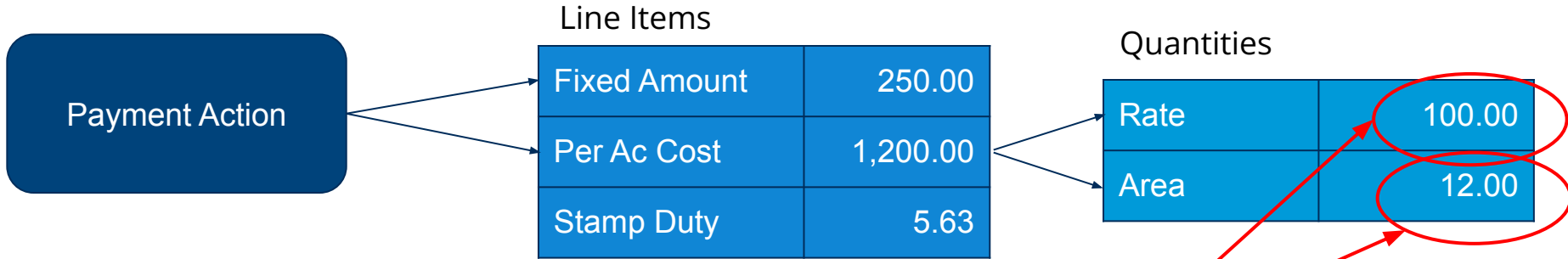
- Payment Line Items calculated with Structured Data
 - Action example (*Production Royalty*)
 - License example (*Property Tax payment*)
- Support for Unit Conversions on Structured Data
- Structured Data used in a business rule Criteria
- Copying Structured Data between business records

Payment Line Items calculated with Structured Data: *on Action*



Payment Line Items calculated with Structured Data: *on Action*

Change: Quantities can come from a Structured Data entry



Attributes:

Action Structured Data:

Production Report > Production Report

Payment Line Items calculated with Structured Data: *on Action*

< Actions > Edit > Generic

**US: Fee Parcel

Code: **US: Fee Parcel

Name: **US: Fee Parcel

Parties:

Type: United States: Fee Parcel

Status: Active

Anniversary Date:

Grant Date:

Expiry Date:

**Production Report

General

Documents

Reference Codes

Discussions

Audit

Production Report

Production Report

There are 1 items in the list.

Export Tonnes	Area	Rate
500.00	12.000 Acres	100.00

Payment Line Items calculated with Structured Data: *on License*

**US: Fee Parcel

Code: **US: Fee Parcel
Name: **US: Fee Parcel
Parties:

Type: United States: Fee Parcel
Status: Active
Anniversary Date:

Grant Date:
Expiry Date:

General

Current Tax Data

There are 1 items in the list.

Year	Due Date	Amount
2022	Oct/31/2022	1,234.00

Shape (1)

Historical Tax Data

There are 2 items in the list.

Year	Assessed Value	Improvements	Paid	Paid Amount
2020	100,000.00	0.00	No	0.00 US Dollar
2021	110,000.00	10,000.00	Yes	10,000.00 US Dollar

Documents

Reference Codes

Commodities

Agreements

Groups

Related Licenses

Tax Information

Production Limits (1)

Payment Line Items calculated with Structured Data: *on License*

Business Rules > Add > Schedule New Action > Payment

Abbreviation:

< BACK

Please provide details on the amount

Payment Currency:

Payment Direction:

Amount:

Calculate amount.
 Copy from trigger action.
 Copy from prior action:
 Copy from recent action:

Round amount:

Payment Portion (Line Item)

Description: Payment Line Item

Quantities:

Del.	Name
<input checked="" type="checkbox"/>	Amount
<input checked="" type="checkbox"/>	Dividend
<input type="checkbox"/>	+

Payment Item Quantity - Google Chrome

qa.landfolio.com/PortalDevelopmentLandfolio/PaymentItemQuantityPopup.aspx?RefreshButton=AddPayment_XML_PaymentLineItem_d...

Line Item Quantity

OK

Name: Amount

Value: Explicit Value Parameter Value Attribute Search Result

License Attribute: License Attribute

License Attribute: Current License

Attribute: Structured Data

Structured Data Node: Current Tax Data
(This list is filtered to only show structured data nodes that are common to the workflows license types and the selected action type)

Child Node: Amount
(This list is filtered to only show nodes of type Currency, Number, Percent, Area, or Distance)

Update selected value: Multiply By 10.25

Round Area down to 2 decimal places

Escalating at

Pro Rata

Display: decimal places (Maximum is 8).

Amount: License Attribute: Current License Structured Data 'Financial Data' - Child Node 'Cost Amount' down to 2
Dividend : Action Attribute: Trigger Action Structured Data 'Mining Production' - Child Node 'Estimated Value'

Payment Line Items calculated with Structured Data

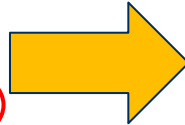
- Only supports type:
 - Area
 - Distance
 - Currency
 - Number
 - Percent

Payment Line Items calculated with Structured Data

Support for unit conversions (Area & Distance)

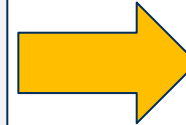
Structured Data:

Survey Date	Area Value
11 Aug 2022	1 254 Ha



Business Rule:

Quantity:
'Surveyed Area'
in Acres



Payment Action:

Quantity:
Surveyed Area:
3,098.70 Ac

Payment Line Items calculated with Structured Data

Line Item Quantity OK

Name:

Value: Explicit Value Parameter Value Attribute Search Result

License Attribute:

Attribute:

Structured Data Root Node:

Child Node:

per

Round Area decimal places

Update selected value:

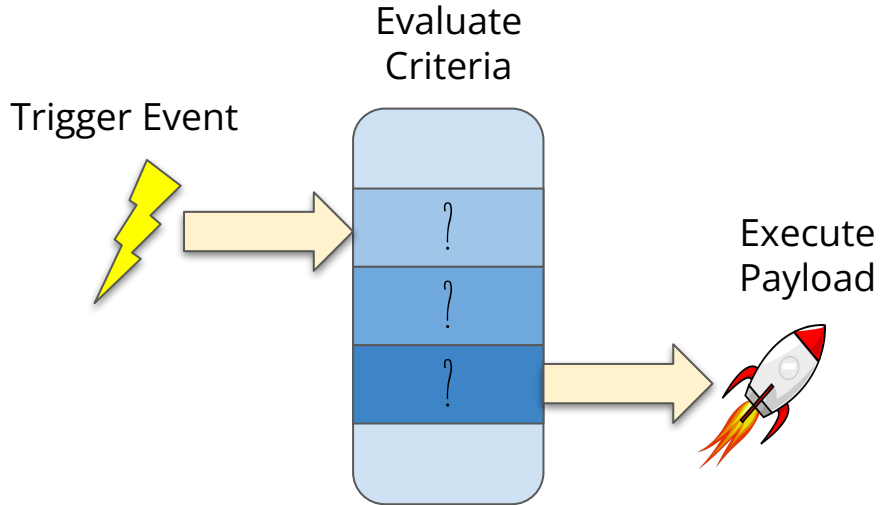
Escalating at

Pro Rata

Display: decimal places (Maximum is 8).

Structured Data used in Business Rule Criteria

Business Rules evaluate **Criteria** to decide if a rule should be executed



Structured Data used in Business Rule Criteria

Criteria consist 3 parts:

- Validation Value
- Operator
- Comparison Value

Structured Data used in Business Rule Criteria

Validation Value	Operator	Comparison Value
License Status	Equals	'Active'

Validation Value	Operator	Comparison Value
Action Due Date	less than	License Expiry Date

Structured Data used in Business Rule Criteria

Change: Validation and Comparison values can be Structured Data Entries

Validation Value	Operator	Comparison Value
Action 'Production Report Export Tonnes'	less than	100 000

Validation Value	Operator	Comparison Value
Action 'Production Report Export Tonnes'	less than	License 'Production Limits Tonnage'

Structured Data used in Business Rule Criteria

Parties: Type: United States: Fee Parcel Grant Date:
Name: **US: Fee Parcel Status: Active Expiry Date:
Interest: Leased Tax Notice Date: Oct/03/2022

**Production Report

General	Production Report		
Documents	There are 1 items in the list.		
Reference Codes	Export Tonnes	Area	Rate
Discussions	500.00	12.000 Acres	100.00
Audit			
Production Report			

General	Production Limits		
Parties	There are 1 items in the list.		
Address	Tonnage	Contract	Signed Date
Conditions	100,000.00	Yes	Apr/09/2013
Shape (1)			
Map References (2)			
Documents			
Reference Codes			
Commodities			
Agreements			
Groups			
Related Licenses			
Tax Information (3)			
Production Limits			
Production Report			

Structured Data used in Criteria

- Only supports
 - Currency
 - Number
 - Area (with unit conversion)
 - Distance (with unit conversion)
 - Yes/No
 - Option List
 - Date

Business Rules: Copying Structured Data

Business Rules / Workflows can now copy Structured Data between → Licenses, Agreements, Groups and Actions.

If Structured Data with the specified node already exists, the rule can:

- **Add** will create new entries on existing Structured Data.
- **Replace** will replace the Structured Data node in its entirety.

Business Rules to Copy Structured Data

[← Business Rules > Add > Update License Attributes](#)

License SD

Abbreviation: _____ Jurisdiction: United States

[< BACK](#) [FINISH](#)

Please select an attribute to update and specify the new value to apply

Attribute: New Value: _____

If structured data with the specified node already exists

Add
 Replace (will be added if it does not exist)

Action Attribute



Action Attribute:

Action Type:

Attribute:



Structured Data Node:

(This list is filtered to only show structured data nodes that are common to the workflows license types and the selected action type)



Business Rules to Copy Structured Data

Business Rules License Types Documents Audit

There are 1 Rules associated with this workflow.  

1

All	Active	Trigger Action	Execution Context	Criteria	Name	Summary	Ref.	Pos.
<input type="checkbox"/>	<input type="checkbox"/>	Application	Closing Trigger Action		Copy SD Rule	Update License Structured Data to Action Attribute: Trigger Action Structured Data 'Fixed Asset Register'		1.0

1

Note: The configuration will only allow the User to select Structured Data nodes that are common among the object types configured for the selected Workflow.

Shape lengths in Business Rules



Allow for the Shape Official Length attribute to be used in rules

The Business Rule attribute lists now include the shape length and distance units.

The following are additional shape length attributes that can now be used when configuring a business rule or rule criterion detail:

- Shape Official Length
- Shape Official Length Unit
- New Shape Official Length
- New Shape Official Length Unit
- Old Shape Official Length
- Old Shape Official Length Unit
- Existing Shape Official Length
- Existing Shape Official Length Unit
- Surveyed Shape Official Length
- Surveyed Shape Official Length Unit
- Comparison Shape Official Length
- Comparison Shape Official Length Unit
- Result Shape Official Length
- Result Shape Official Length Unit
- Validation Shape Official Length
- Validation Shape Official Length Unit

Allow for the Shape Official Length attribute to be used in rules

Configuring a rule to calculate the Payment amount using the Official Length attribute

The screenshot shows a web application interface for configuring a rule. The main window is titled "Business Rules > Add > Schedule New Action > Payment". The interface is divided into two main sections: a configuration panel on the left and a modal dialog on the right.

Configuration Panel (Left):

- Abbreviation: (empty field)
- < BACK button
- Please provide details on the amount and currency of the payment
- Payment Currency: US Dollar (dropdown)
- Payment Direction: Incoming (dropdown)
- Amount:
 - Calculate amount.
 - Copy from trigger action.
 - Copy from prior action:
 - Copy from recent action:
 - Round amount:
- Payment Portion (Line Item)
 - Description: (empty field)
 - Quantities: Del. Name (dropdown with a plus sign)
 - Value: to nearest 2 decimal places.

Modal Dialog (Right): "Line Item Quantity"

- Name: Quantity (dropdown)
- Value:
 - Explicit Value
 - Parameter Value
 - Attribute
 - Search Result
- License Attribute: License Attribute (dropdown)
- License Attribute: Current License (dropdown)
- Attribute: Shape Official Length (dropdown, highlighted with a red box)
- per: Kilometres (dropdown)
- Round Distance down to 0
- Update selected value: (input field)
- Escalating at
- Pro Rata
- Display: decimal places (Maximum is 8).

The modal dialog also features an OK button in the top right corner.

Re-ordering Vertices



Reordering Vertices via a Business Rule

A new business rule feature is available that will reorder the vertices of a shape.

The new "Reorder vertices" allows a user to specify the position to start the reordering:

- North-West
- North-East
- South-East
- South-West

This feature is available on:

i) Shape attribute updates for Licenses / Agreements;

ii) Shape Change Actions e.g Shape Validation, Shape Change, Renewal and Survey Actions.

Reordering Vertices via a Business Rule

Configuring a rule to automatically reorder vertices

[Business Rules](#) > [Add](#) > Update License Attributes

_TEST_001_ED

Abbreviation: _____ Jurisdiction: **United States**

[< BACK](#) [FINISH](#)

Please select an attribute to update and specify the new value to apply

Attribute: New Value:

Reproject shape to

Merge contiguous parts

Reorder vertices starting at most vertex


Set official area:

Copy license shape official area

Use calculated area

Leave blank

Update map references



Reordering Vertices via a Business Rule

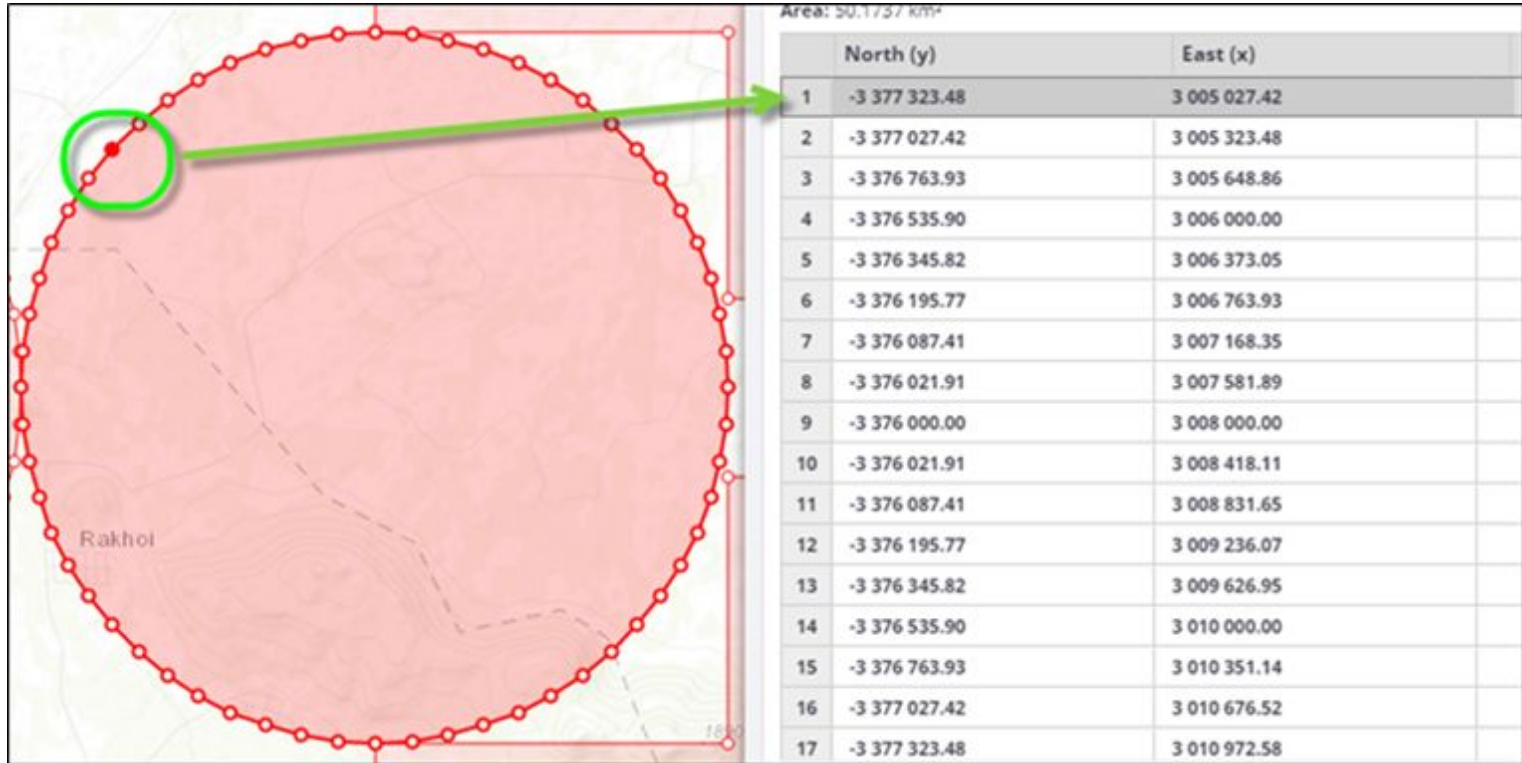
Depending on the BR configuration, i.e. if the first vertex of the Shape Part is not in the configured position (e.g. North-West), the business rule updates the order of the vertices, until the first vertex is in the configured position. This feature applies to both internal and external shape parts.

Shape with original starting vertex before running the business rule



Reordering Vertices via a Business Rule

Shape updated based on business rule to reorder at most North-West vertex



Holiday Calendar



Holidays Lookup Table


A new Lookup Table has been added called "Holidays" and will allow a user to specify holiday dates per Jurisdiction.

Business Rules will also make use of the Holidays lookup table to automatically schedule dates on Actions that uses working day intervals.

Admin Tools > Lookup Tables > Other > Holidays

Note: Only business rules that use Working Days will adjust dates using the holiday calendar. Actions that are already scheduled will not be re-scheduled when editing the holiday calendar.

There are 4 Holidays in the list + × 🔍 ☰

All	Edit	Name	Date	Jurisdiction
<input type="checkbox"/>		New Year's Day	01/January/2020	United States
<input type="checkbox"/>		Martin Luther King Jr. Day	20/January/2020	United States
<input type="checkbox"/>		Memorial Day	25/May/2020	United States
<input type="checkbox"/>		Independence Day	03/July/2020	United States

Thank You

Questions?

