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What's New?

Business Rules and Workflows

Trimble

Overview

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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
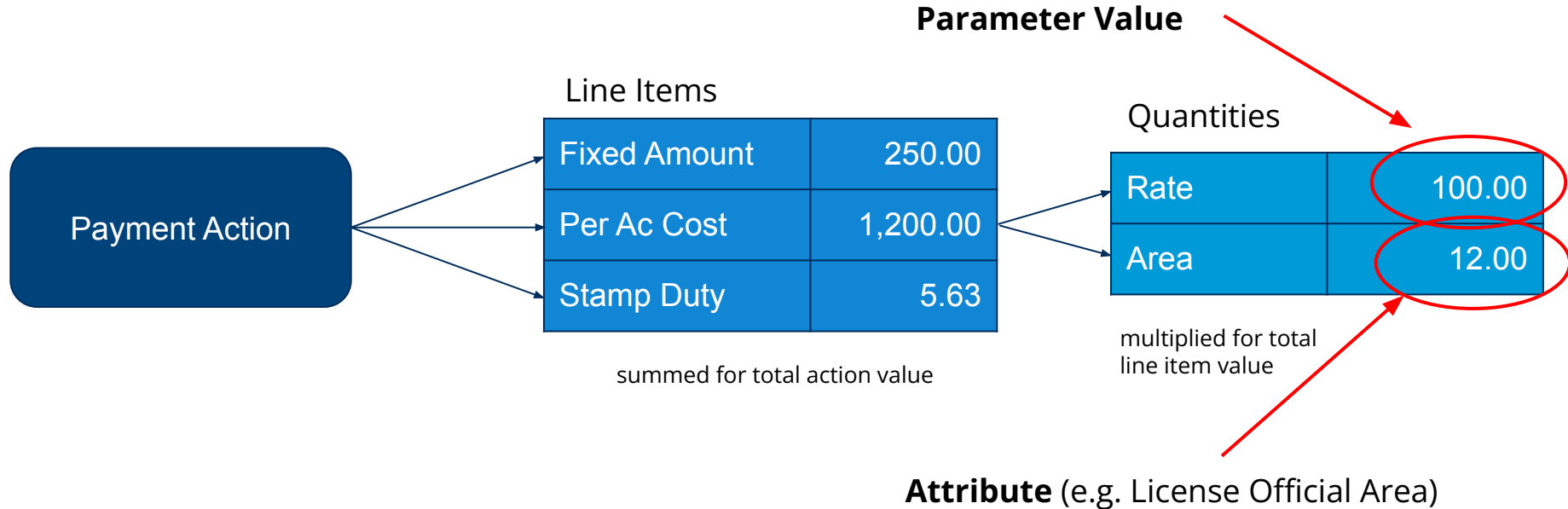
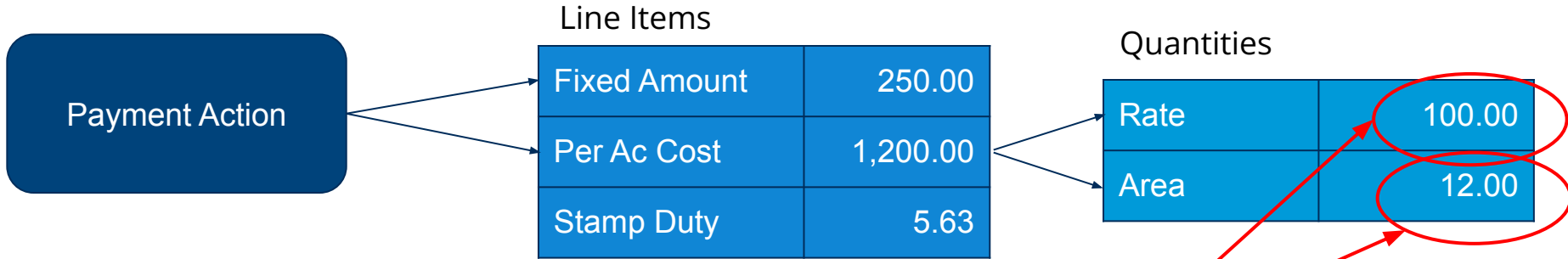# Structured Data

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*

Parameter Value

Line Items

Fixed Amount	250.00
Per Ac Cost	1,200.00
Stamp Duty	5.63

Payment Action

summed for total action value

Quantities

Rate	100.00
Area	12.00

multiplied for total line item value

Attribute (e.g. License Official Area)

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

Change: Quantities can come from a Structured Data entry

Line Items

Fixed Amount	250.00
Per Ac Cost	1,200.00
Stamp Duty	5.63

Payment Action

Quantities

Rate	100.00
Area	12.00

Attributes:
Action Structured Data:
Production Report > Production Report

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

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

**US: Fee Parcel

Code:	**US: Fee Parcel	Type:	United States: Fee Parcel	Grant Date:	
Name:	**US: Fee Parcel	Status:	Active	Expiry Date:	
Parties:		Anniversary Date:			

General	**Current Tax Data**
Parties	There are **1** items in the list.
Address	
Conditions	
Shape (1)	
Map References (2)	
Documents	
Reference Codes	
Commodities	
Agreements	
Groups	
Related Licenses	
Tax Information	
Production Limits (1)	

Current Tax Data

There are **1** items in the list.

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

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

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

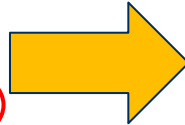# Payment Line Items calculated with Structured Data

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

Payment Line Items calculated with Structured Data

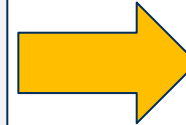## Support for unit conversions (Area & Distance)

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

Structured Data used in Business Rule Criteria

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

Evaluate Criteria

Trigger Event

?

?

?

Execute Payload
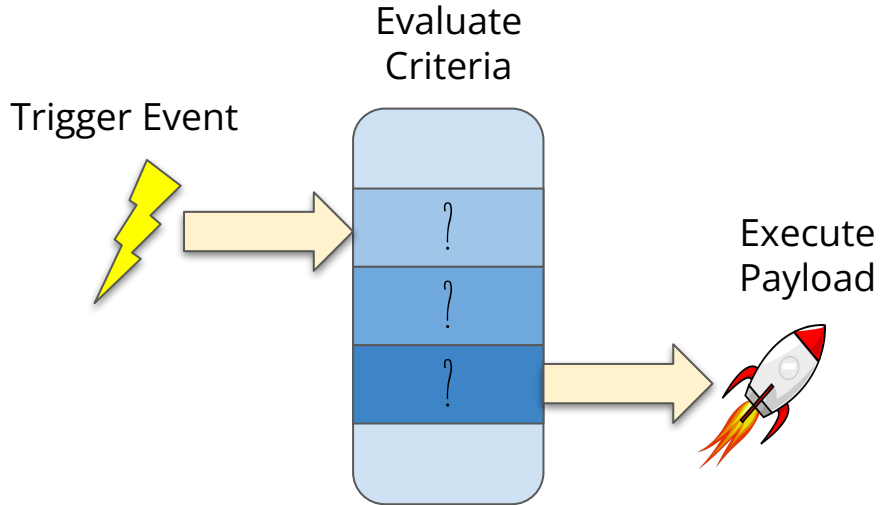
Structured Data used in Business Rule Criteria

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:
Name: **US: Fee Parcel
Interest: Leased

Type: United States: Fee Parcel
Status: Active
Tax Notice Date: Oct/03/2022

Grant Date:
Expiry Date:

**Production Report

	Production Report
General	There are **1** items in the list.
Documents	
Reference Codes	
Discussions	
Audit	
Production Report	

Export Tonnes	Area	Rate
500.00	12.000 Acres	100.00

	Production Limits
General	There are **1** items in the list.
Parties	
Address	
Conditions	
Shape (1)	
Map References (2)	
Documents	
Reference Codes	
Commodities	
Agreements	
Groups	
Related Licenses	
Tax Information (3)	
Production Limits	
Production Report	

Tonnage	Contract	Signed Date
100,000.00	Yes	Apr/09/2013

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 to Copy Structured Data

All	Active	Trigger Action	Execution Context	Criteria	Name	Summary	Ref.	Pos.
☐	☐	Application	Closing Trigger Action		Copy SD Rule	Update License Structured Data to Action Attribute: Trigger Action Structured Data 'Fixed Asset Register'		1.0

Business Rules | License Types | Documents | Audit

There are **1** Rules associated with this workflow.

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

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

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

	North (y)	East (x)
1	-3 380 000.00	3 012 000.00
2	-3 379 581.89	3 011 978.09
3	-3 379 168.35	3 011 912.59
4	-3 378 763.93	3 011 804.23
5	-3 378 373.05	3 011 654.18
6	-3 378 000.00	3 011 464.10
7	-3 377 648.86	3 011 236.07
8	-3 377 323.48	3 010 972.58

Reordering Vertices via a Business Rule

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

Area: 50.1737 km²

	North (y)	East (x)
1	-3 377 323.48	3 005 027.42
2	-3 377 027.42	3 005 323.48
3	-3 376 763.93	3 005 648.86
4	-3 376 535.90	3 006 000.00
5	-3 376 345.82	3 006 373.05
6	-3 376 195.77	3 006 763.93
7	-3 376 087.41	3 007 168.35
8	-3 376 021.91	3 007 581.89
9	-3 376 000.00	3 008 000.00
10	-3 376 021.91	3 008 418.11
11	-3 376 087.41	3 008 831.65
12	-3 376 195.77	3 009 236.07
13	-3 376 345.82	3 009 626.95
14	-3 376 535.90	3 010 000.00
15	-3 376 763.93	3 010 351.14
16	-3 377 027.42	3 010 676.52
17	-3 377 323.48	3 010 972.58

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

1

All	Edit	Name	Date	Jurisdiction
☐	🖊	New Year's Day	01/January/2020	United States
☐	🖊	Martin Luther King Jr. Day	20/January/2020	United States
☐	🖊	Memorial Day	25/May/2020	United States
☐	🖊	Independence Day	03/July/2020	United States

1

Thank You

Questions?