



Governance - Risk - Compliance









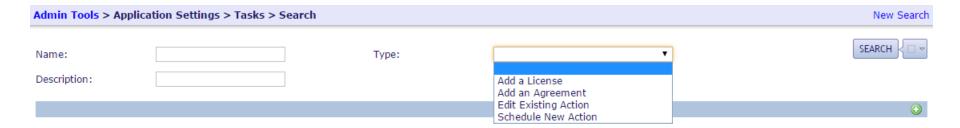
Overview of Tasks, Templates, and the Homepage

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

spatial dimension

Tasks

Common Tasks





Templates

Available templates

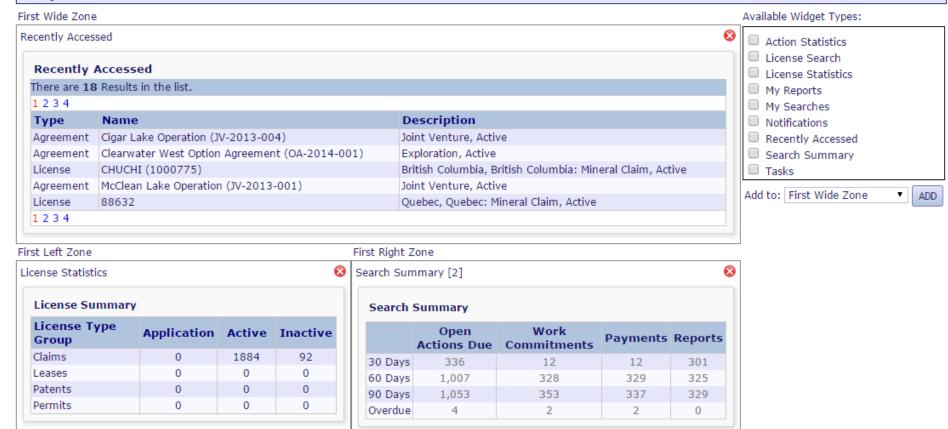
Templates

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.





0 1001 7

Template Configuration

Group Templates are a NEW addition
All Tabs on License / Agreement / Group
details can be pre-configured



Template is available on NLW / BNLW / Tasks

Can be modified later – only affects new records





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





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



Schedule New Action

Single Action or Action Series

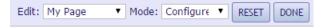
Choose if action is associated with Licences, Agreements or one of the Group Types

- 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)



Adding Tasks to your Homepage

Start homepage configuration <a>Insert Task into a homepage zone
Go into Configure mode



Setup Task Widget
Name Your Task Widget and
add your Tasks

Available Widget Types: Action Statistics License Search License Statistics My Reports My Searches Notifications Recently Accessed Search Summary Tasks Add to: First Wide Zone



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



Questions



