

Presented By:  
Heather Judd - Business Analyst

# **Notifications, Distributed Reports/Searches, & Discussions - oh my!**

---

Managing Alerts through Action Notifications,  
Distributed Reports & Searches, and Discussions

## Overview

01

### **Notifications**

How to set up and you can now add an attachment to the notifications

02

### **Distributed Reports & Searches**

Saved searches can be distributed as reports or searches to users

03

### **Discussions**

What they are and how to use them

04

### **Questions?**

Any general questions regarding Notifications, Distributed Reports and Discussions, & Discussions



# Notifications

---

- Notifications alert and remind Users and Parties in Landfolio of upcoming obligations, responsibilities, or progress on workflows such as due dates on licenses or parcels.
- Notifications are sent from Landfolio via Email or as SMS messages.
- Note that User Notifications can be based on the following:
  - Action Closed Date
  - Action Creation Date
  - Action Due Date



# Notifications

## Internal User Notifications

Admin Tools > System Types > Action Types > View Save Cancel

Action Type Name: **Expiry (NFL)**

- General
- User Notifications**
- Documents
- Jurisdictions
- Reference Template
- Checklist Items
- Interface Customisation
- Decision Results
- Field Settings
- Document Types
- Statistic Types
- Structured Data Nodes
- Embedded Reports

There are 2 Notification dates

1

All	Notification	Interval		Before/After	Date	Filter	Send Daily
<input type="checkbox"/>	Notification 1	1	Months	Before	Action Due Date	ALL OPEN ACTION	<input type="checkbox"/>
<input type="checkbox"/>	Notification 2	0	Days	After	Action Closed Date	ALL ACTIONS	<input checked="" type="checkbox"/>

1

Notification Distribution

Role	Notification 1		Notification 2	
	E-Mail	SMS	E-Mail	SMS
Contract Manager	Batch			
Data Viewer	Batch			
Land Manager			Single Acti	
Project Manager				

# Notifications

Internal User Notifications - Set daily Notification in your “My Settings”

← My Settings ✎ Edit

## Heather Judd

Contact Details	Receive daily notifications at:	07:00
Preferences	Current time zone:	GMT -04:00
<b>Notifications</b>	Batch email notifications report template:	Default Batch E-Mail Action Notification Schema
Searches		
User Groups		



# Notifications

## External Party Notifications

- Party Notification tab allows automatic distribution of notifications to external parties

Admin Tools > System Types > Action Types > View ◀ Previous Next ▶ Edit

Action Type Name: **Attach Documents**

General Approvals User Notifications **Party Notifications** Documents Jurisdictions Reference Template Checklist Items Interface Customisation

Decision Results Field Settings Document Types Statistic Types Structured Data Nodes Embedded Reports

There are **1** Notification dates

**1**

All	Notification	Interval	Before/After	Date	Filter
<input type="checkbox"/>	Notification 1	0 Days	After	Action Closed Date	AUTH: ALL ACTIONS

**1**

Notification Distribution

**Parcel**

**1**

Party Type	Notification 1	
	E-Mail	SMS
Agent	Party Action Alert Notification	
Appellant		



# Notifications

## Notification Templates

- Batch Notification Templates

```
</head>
<body>
  <h1>Landfolio</h1>
  <h2>Action Notification</h2>
  <b>[[General|Todays Date|Format:dd MMM yyyy]]</b>
  <br />
  <b>[[user|full name]] ([[User|Email]])</b>
  <br />
  <b>Actions scheduled for notification today:</b>
  <br />
  <table class="notifyTable" cellspacing="0">
    <tr>
      <td>[[User|Notification List|notification date:today]]</td>
    </tr>
    <tr>
      <td class="header">Code</td>
      <td class="header">Name</td>
      <td class="header">Type</td>
      <td class="header dateDue">Date Due</td>
      <td class="header daysRemaining">Days<br />Remaining</td>
      <td class="header">Action</td>
      <td class="header">Responsible Person</td>
    </tr>
    <tr>
      <td><a href="[[Application URL]]/Hook.aspx?Hook=AssociatedObjectDetail&AssociatedObjectID=[[Associated-Object ID]]">[[Code]]</a></td>
      <td>[[Name]]</td>
      <td>[[Associated-Object Object Type]]</td>
      <td class="dateDue">[[Date Due|Format:dd MMM yyyy]]</td>
      <td class="number daysRemaining">[[Days Remaining]]</td>
      <td class="action"><a href="[[Application URL]]/Hook.aspx?Hook=ActionDetail&ActionID=[[Action ID]]">[[Action Type]]</a></td>
      <td class="responsibleUser">[[Responsible User]]</td>
    </tr>
  </table>
</body>
</html>
```



# Notifications

## Notification Templates

- Batch Notification Templates

FlexiCadastré  
Action Notification  
12 Nov 2013  
Vuyokazi ([vuyokazi.nogilana@spatialdimension.com](mailto:vuyokazi.nogilana@spatialdimension.com))  
Actions scheduled for notification today:

Code	Name	Type	Due Date	Days Remaining	Action	Responsible Person	Responsible Person Job Title	Comment
<a href="#">0_0001Vuyo</a>	322_License Name	License	12 Nov 2013	0	<a href="#">Application</a>	Vuyokazi	General Manager	Today is the day woohooooo
<a href="#">3002</a>	ASHMORE (NSR)	Group	12 Nov 2013	0	<a href="#">Application</a>	Vuyokazi	General Manager	Test





# Notifications

## Notification Templates

- Individual Notification Templates

```
</style>
</head>
<body>
  <table border="0">
    <tr>
      <td style="width: 400px">
        <p align="center" class="style2">
          <span class="style3">Landfolio<br />
          </span><span class="style4">User Notification</span>
        </p>
      </td>
    </tr>
  </table>
  <p class="style2">
    [[General|Todays Date]]</p>
  <p class="style2">
    </p>
  <p class="style2">
    This email notification is to let you know that the [[Action|Action Type]] action on agreement [[Agreement|Code]] was closed today.

    This action was closed by user [[Action|Agreement|Land Manager]]
  <br />
</p>
</body>
</html>
```



# Notifications

## Notification Templates

- Individual Notification Templates

Landfolio

User Notification

Oct/02/2022

This email notification is to let you know that the Expiry (NFL) action on agreement 018130M was closed today. This action was closed by user Heather Judd

↩ Reply

➦ Forward



# Notifications Demo

---



# Distributed Reports

- Automated distribution of system reports to Users or Legal Entities using email

< Reports > Add Save Cancel

General **Distribution** Options

**SEND NOW**

Distribute via Email:




Start Date Time: Oct/01/2022 09:00:00  \*

Interval: 1 Months


Distribution Format: PDF

Distribute even if no results:




Save report to the following location: C:\Users\hjudd\Desktop\landfolio L

There are 1 Landfolio users in the list.   

1

All	Full Name	Email Address
<input type="checkbox"/>	 Heather Judd	heather_judd@trimble.com

1

There are 1 Legal Entities in the list.   

1

All	Name	Code	Type	Email Address
<input type="checkbox"/>	Judd Enterprises		Company	heather_judd@trimble.com



# Distributed Searches

- Saved Searches set up to be distributed by email through hyperlinks

My Settings Save Cancel

Contact Details Preferences Notifications **Searches** User Groups

**Search Detail:**

Name:  SEND NOW

Show on Home Page:


Distribute via Email:

Start Date Time:

Interval:

Distribute even if no results:

There are 1 Landfolio users in the list.

All	Full Name	Email Address
<input type="checkbox"/>	 Heather Judd	heather_judd@trimble.com



# Distributed Reports & Searches Demo

---



# Discussions

- Provides an interface to make comments and discuss topics related to the Asset or Action
- These can be attached to:
  - Licenses
  - Agreements
  - Groups
  - Actions

< License > Details Edit

017565M >

Code: 017565M      Type: Newfoundland & Labrador: Map Staked Claim      Grant Date: Apr/01/2005  
Name:      Status: Active      Expiry Date: Apr/01/2021  
Parties: Jet Metal Corp. (100%)      Anniversary Date: Apr/01/2017

General   Parties (1)   Conditions   Shape (1)   Map References (1)   Documents   Reference Codes (1)   Commodities   Agreements (1)   Groups (1)   Related Licenses (1)   Tax Data  
Actions Open (7)   Actions Closed (8)   Work Accounts   User Roles (2)   **Discussions**   Audit

**NEW DISCUSSION**

**No email for Party Owner. Need update**   Sep/30/2022  
Obtained

**Incorrect coordinates**   Sep/30/2022

**Missing Signature**   Sep/30/2022  
File updated 9/30/2022.

No email for Party Owner. Need update   **Opened Sep/30/2022**

**Users** Heather Judd  
**Companies** Judd Enterprises

New comment

**Heather Judd**   14:15  
Obtained

**Heather Judd**   14:15  
Owner died, need new info.

**Heather Judd**   14:15



# Discussions

- Internal users and External parties can receive notification alerts when comments are added to discussions.
- Participants can include:
  - Internal users
  - External People
  - External Companies

 **Users** Heather Judd

 **People** Heather Judd

 **Companies** Judd Enterprises

< [Admin Tools](#) > Application Settings > General Settings

## Discussions

Enable Discussions:

Include companies in Discussions:

Include people in Discussions:

Email notification templates for new comments:  [Template for users](#)  
 [Template for people](#)





# Discussions Demo

---



# Questions?

---



# Thank You

For Questions  
or Feedback  
please contact:  
[heather\\_judd@trimble.com](mailto:heather_judd@trimble.com)

