

Presented By:
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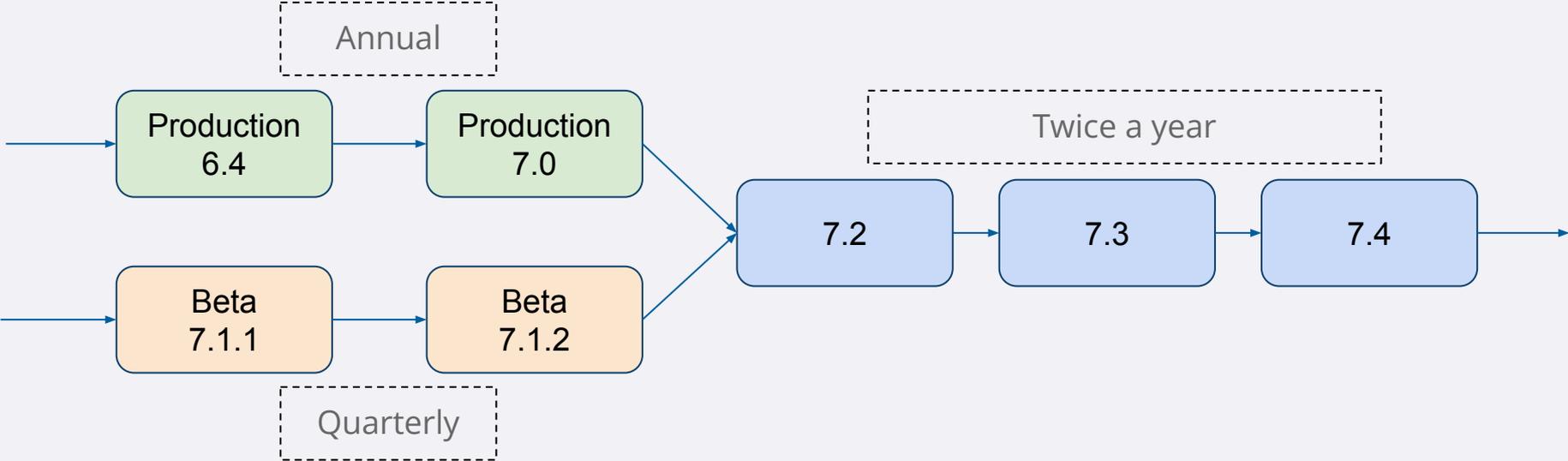
What's New in Landfolio

7.0 and 7.2

Landfolio Back Office ~~7.1.3~~ 7.2

What's New?

Landfolio Back Office



New Release Cycle



Drivers for new functionality

- Product useability and flexibility
- Client requests
- Project-driven requirements



Main themes

- Greater configurability of user interface
- Document management
- Embedded reporting
- Structured data
- Bulk processes (importers, exporters)
- Improved integration tooling



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Assets



Assets

New Copy Parties Wizard

Copy Parties Wizard

< PREVIOUS CANCEL DONE

Select Records

Add to existing Parties
 Replace existing Parties

Select Parties from Licenses to copy:

There are 5 items in the list.

1

All	Party	Party Type	%	Shares	To Party Type
<input checked="" type="checkbox"/>	New OLEN LESLIE BACKMAN2	Interested Party	123,00		Registered Owner
<input checked="" type="checkbox"/>	QA AGNICO CMSA SOLITARIO ARGENTINA	1 Mineral_QA	2.00		Operator

User can optionally add new Parties, or overwrite existing ones



Assets

Tasks are home page **shortcuts to wizards** that guide the user through common jobs

License > Details

2058\PP2464

2058\PP2464 Type: Crown Parcels
Application Date: 19-Sep-2018 Status: Active
Code: 2058\PP2464 Official Area: 711,58 km²

General Only show ALL ALL

Parties Direct Actions Hide Child Actions: Due: ALL

Address There are 0 actions in the list.

Conditions Indirect Actions Indirect Actions

Shape (1) There are 0 actions in the list.

Map References

Documents

Reference Codes

Commodities

- Generate report
- Export
- Excel
- Word
- Perform a task

Can now also be displayed on the **Asset Details Page**



Assets

Importers support specifying the legal entity **Code** for a party in the import spreadsheet

	A	B	C	D	E	F	G	H	I
1	Code	Name	Type	Party	Party Code	Party Type	Percentage	Commodity	
2	ABC00123	Big Joe 1	Mining Right	Dimension Mining	A01	Minerals Owner	100	Gold	
3	ABC00123	Big Joe 1	Mining Right	Johan Johansen	B23	Surface Owner	100		
4									
5									
6									
7									
8									
9									



Assets

License and Agreement importers support bulk **updating User Roles**

	A	B	C	D	E	F	G	H	I
1	Code	Name	New Code	New Name	Jurisdiction	Type	Role: Land Manager	Role: Exploration Manager	
2	ABC00123	Big Joe 1	AAA11	Small Joe	South Africa	Mining Right	Bob Black	Jim Green	
3									
4									
5									
6									
7									
8									

Importer will either add or update an existing Role on the Asset



Assets

Condition Types can be configured as **Not Editable by users**

Search Admin Tools > Lookup Tables > Agreements > Condition Type

There are 68 Condition Types in the list.

1 2

All	Delete	Edit	Condition Type	Unit Type	Indirect on Agreements	Indirect on Licenses	Agreement Condition Type	License Condition Type	Allow editing by users	Commonly used
<input type="checkbox"/>	<input checked="" type="checkbox"/>		Access Rights	Custom	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>		Advanced Royalty	Custom	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>		Annual Rent	Custom	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>		Area of Influence	Custom	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>		Area of Interest	Custom	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>		Audits	Custom	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>		Bond	Custom	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>		Buyback Right	Custom	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>		Buyout Rights	Custom	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Allows software integrations to manage these values



Actions



Actions

Action Search allows searching for Actions **Closed By** a specific user

The screenshot displays the 'Actions > Search' interface. On the left, there are various search filters including Code, Name, Party, Indirect Group, Indirect Agreement, User, Role, Responsible User, Responsible Role, and Closed By. The 'Closed By' field is highlighted with a red dashed box. Below these fields are options for 'Date search' (Absolute Dates or Relative Dates) and 'Created', 'Due', and 'Closed' date pickers. At the bottom, there is a 'Search by Structured Data' dropdown.

On the right, a 'User Search' popup window is open. It contains fields for Name (sa), Region, User Type, User, Role, and checkboxes for 'Include InActive' and 'Accounts'. A 'SEARCH' button is visible. Below the search fields, it states 'There are 4 Landfolio users in the list.' and displays a table of results.

	Full Name	User Name	Domain Name	Role Abbreviations	Account Active	Authentication	Role on Licenses	Role on Groups	Role on Agreements
1	Demetrios Savvides	demetrioss	SPATIAL.local		True	Domain	0	0	0
	Isabel Muller	Isabelm	SPATIAL.local		True	Domain	0	0	0
	Michael Sands	Michaels	SPATIAL.local		True	Domain	0	0	0
	Saliegh Aziz	Saliegha	SPATIAL.local		True	Domain	0	0	0



Actions

A new **Notes** field is available on **Work Commitment** actions

Free-text notes against a
Category, Sub Category or
Line Item

Supported by the Work
Commitment Importer

Actions > Edit > Work Commitment

Status:

Status Date:

RECALCULATE +

Del.	Item	Start Date	Difference	Notes
✗	Exploration Activities	01-Apr-2014		
✗	↳ Diamond drilling			
✗	↳ Diamond	01-Apr-2014	150 000,00	
✗	↳ Exploration			
✗	↳ Geophysical			
✗	↳ Gravity	01-Apr-2014	100 000,00	
			-8 000 000,00	
			-8 000 000,00	
	TOTAL			

New work commitment item:

Category: Administration

Sub Category: Reports

Unit Type: Currency

Unit: US Dollar

Item Name: The following is a list of planned work

Start Date: 01-Jul-2021

End Date: 19-Jul-2021

Committed: 25000

Actual: 26500

Notes: The following tasks has been completed by the team

CANCEL ADD



Actions

A new **Scheduled Action Importer** allows daily imports to be automatically executed

The screenshot shows the 'Scheduled Action Importer' configuration window. The 'Import details' dialog is open, showing various fields for configuration. The 'Failed File Location' field is highlighted with a red dashed box and a red arrow pointing to it.

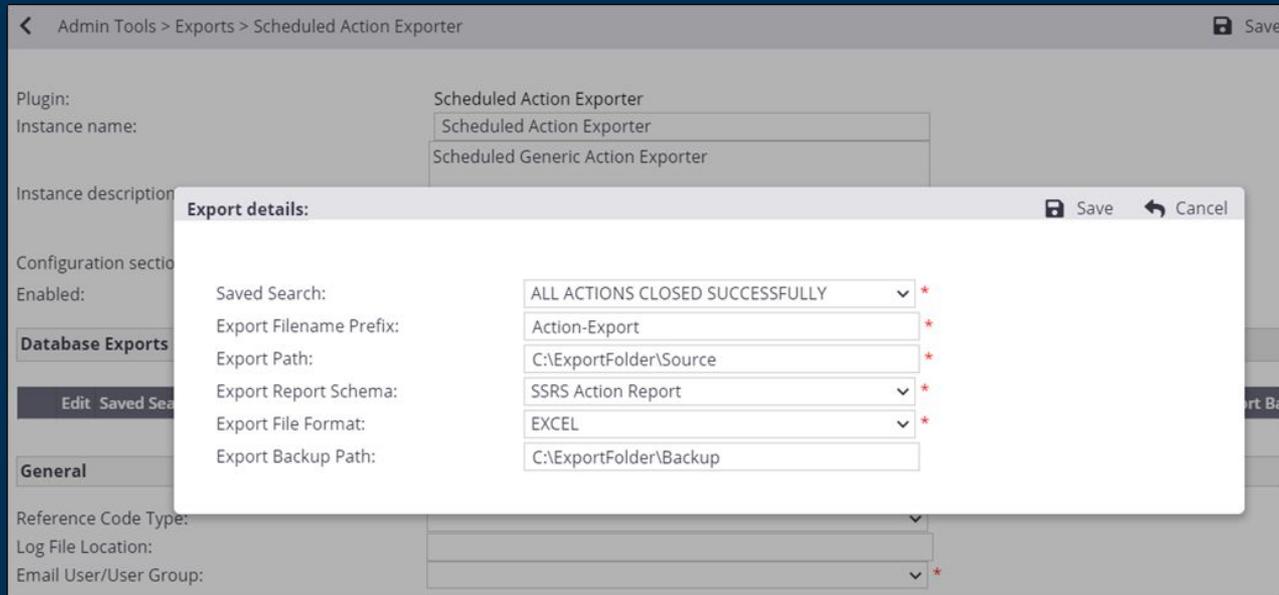
Field	Value
Name:	Monthly Rental Payments *
Enabled:	<input checked="" type="checkbox"/>
Source File Location:	C:\PaymentImporter\Source *
Failed File Location:	C:\PaymentImporter\Failed *
Completed File Location:	C:\PaymentImporter\Completed *
Log File Location:	C:\PaymentImporter\Log *
Import Type:	Add New Actions *
Actions To Import:	Payment *
User To Notify:	Toby Mills *
Import under Authorisation of User:	System User *

A user is sent an **email notification** with the results of each import



Actions

A new **Scheduled Action Exporter** allows details of actions to be exported daily



Exported actions are flagged to prevent re-exporting them



Editing of Direct and Indirect Actions

Multiple **Indirect Actions** can now be selected for **Bulk Editing**

Actions > Edit > Generic

Please note: You are currently editing multiple actions, the changes will be applied to all selected actions.

Action : Send Transfer Letter

Action Documents Discussions Audit

Due Date: 06/12/2019

Comments:

Action Status  To be closed by (Tenure Transfer)



Structured Data



Structured Data

Structured Data now available for **Agreements & Groups** too

Licenses
Agreements
Groups

< License > Details < Previous Next > Edit

6405669 < >

6405669 Updated Digging Date: Claim:
Parties: BARRICK GOLD INC. (100%) Interest: Leased
Code: 6405669 Last Renewal: Min Survey:

General		Financial Data					
Parties (3)	There are 3 items in the list.						
Address	Commodity	Description	Date Reported	Reviewed	Amount	Legal Entity	Office User
Conditions	Iron	Iron deposits	2020/12/01	Yes	12.500.000,00 US Dollar	ACADEMY EXPLORATIONS, LTD.	Richard Williams
Shape	Lead	Lead deposits	2020/12/02	Yes	6.000.000,00 US Dollar	AGNICO AGNICO-EAGLE MINES LTD.	Matthew Watkins
Map References (2)	Silver	Silber deposits	2020/12/03	No	48.000.000,00 US Dollar	ALTORO GOLD CORP	Brooke Miller
Documents	Legal Entity						
Reference Codes	Land Owner	ALLEN & CO.					
Commodities	Land Reference	546.800,00					
Agreements	Land Description	Previous metals mine					
Groups (1)							
Related Licenses							
Land Details							
Actions Open							



Structured Data

Choose between **Table Mode** for multiple rows,
or **Form Mode** for a single record

< License > Details < Previous Next > Edit

6405669 <

6405669 Updated Digging Date: Claim:
Parties: BARRICK GOLD INC. (100%) Interest: Leased
Code: 6405669 Last Renewal: Min Survey:

General

Parties (3)

Address

Conditions

Shape

Map References (2)

Documents

Reference Codes

Commodities

Agreements

Groups (1)

Related Licenses

Land Details

Actions Open

Table Mode

There are 3 items in the list.

Commodity	Description	Date Reported	Reviewed	Amount	Legal Entity	Office User
Iron	Iron deposits	2020/12/01	Yes	12,500,000,00 US Dollar	ACADEMY EXPLORATIONS, LTD.	Richard Williams
Lead	Lead deposits	2020/12/02	Yes	6,000,000,00 US Dollar	AGNICO AGNICO-EAGLE MINES LTD.	Matthew Watkins
Silver	Silber deposits	2020/12/03	No	48,000,000,00 US Dollar	ALTORO GOLD CORP	Brooke Miller

Form Mode

Legal Entity

Land Owner	ALLEN & CO.
Land Reference	546,800,00
Land Description	Previous metals mine



Structured Data

Action available as a new **Value Type**

License > Details < Previous Next > Edit

226132

226132 Updated Digging Date: Claim: H476
Parties: BARRICK GOLD INC. (100%) Interest: Leased
Code: 226132 Last Renewal: Min Survey:

General	Mining Production												
Parties (3)	There are 3 items in the list.												
Mining Production	<table border="1"><thead><tr><th>Mined Resources</th><th>Estimated Value</th><th>Action Items</th></tr></thead><tbody><tr><td>Chrome</td><td>5.000.000,00 US Dollar</td><td>Series of Agreement Start actions</td></tr><tr><td>Diamonds</td><td>100.000.000,00 US Dollar</td><td>Payment (USD 2.500,00 From New Company Name1)</td></tr><tr><td>Silver</td><td>5.000.000,00 US Dollar</td><td>Application</td></tr></tbody></table>	Mined Resources	Estimated Value	Action Items	Chrome	5.000.000,00 US Dollar	Series of Agreement Start actions	Diamonds	100.000.000,00 US Dollar	Payment (USD 2.500,00 From New Company Name1)	Silver	5.000.000,00 US Dollar	Application
Mined Resources	Estimated Value	Action Items											
Chrome	5.000.000,00 US Dollar	Series of Agreement Start actions											
Diamonds	100.000.000,00 US Dollar	Payment (USD 2.500,00 From New Company Name1)											
Silver	5.000.000,00 US Dollar	Application											
Conditions													
Shape (1)													
Map References													



Structured Data

Search by Structured Data using all **Value Types**

- Actions
- Area
- Commodity
- Currency
- Date
- Distance
- Legal Entity
- Number
- Percentage
- Time Interval
- Volume
- Yes / No

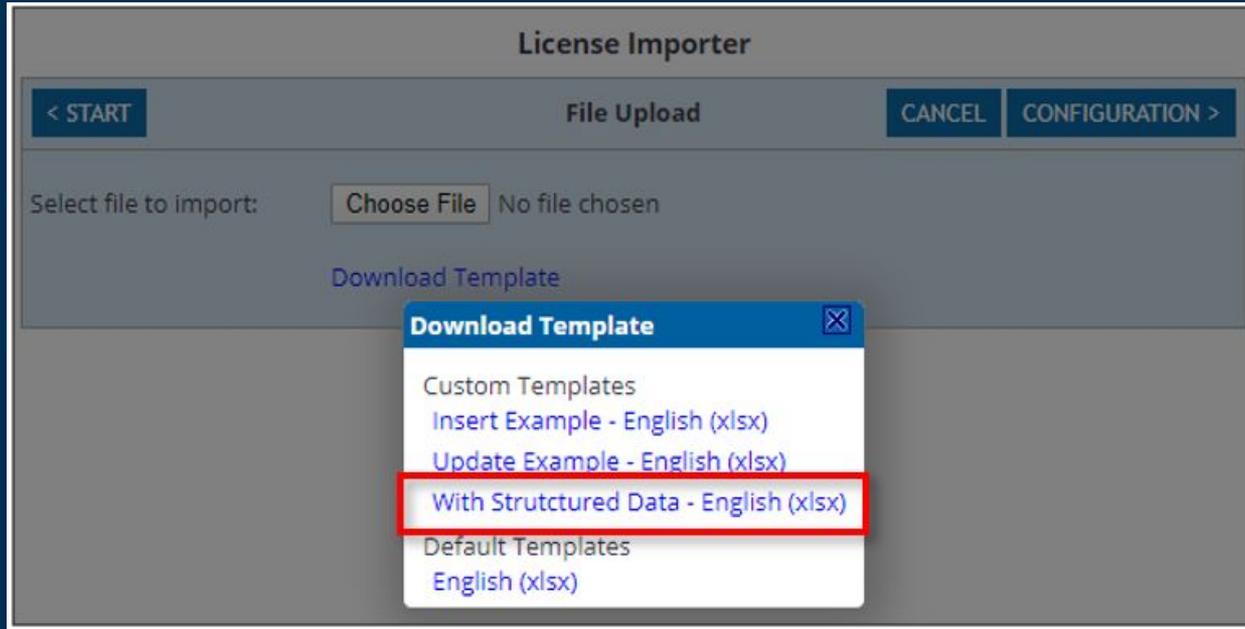
Search by Structured Data

Land Specs	Inspection Date	▼	Equals	▼	2020/07/21	
Land Specs	Land No	▼	Equals	▼	123456	
Land Specs	Estimated Value	▼	Is greater than or equal to	▼	450000.55	US Dollar ▼



Structured Data

Bulk import tool (Excel) now supports Structured Data



Structured Data

Sort by any column in **Table Mode**

< License > Details

2058\PP2464

2058\PP2464
Application Date: 19-Sep-2018
Code: 2058\PP2464

Type: Crown Parcels
Status: Active
Official Area: 711,58 km²

General	Fixed Asset Register
Parties	There are 4 items in the list.
Address	
Conditions	
Shape (1)	
Map References	
Documents	

Date	FAR Description	FAR Parcel Value	▲ FAR Accounting Code	Commodities
11-May-2009	Gold Inc.	54 000,00 US Dollar	1 140,00	Gold
19-Sep-2018	Creswick R.P.	110 000,00 US Dollar	1 141,00	Copper
01-Apr-2021	Platinum Inc.	658 880,00 US Dollar	941,00	Platinum Group Elements
08-Apr-2021	Live Mines	4 564 232,00 US Dollar	4 681,00	Rare Earths

Sorted in the order of capture by default



Business Rules



Business Rules

Business Rule **Summary Page** displays lists of actions modified or created

Existing Actions updated:
There are 1 actions in the list.

Type	Status	Action	Code
	✓	General Reminder	55555

New Actions scheduled:
There are 4 actions in the list.

Type	Status	Action	Code	Due
		General Reminder	55555	15-Dec-2020
		Meeting	55555	21-Dec-2020
		General Reminder	55555	15-Dec-2021
		General Reminder	55555	15-Dec-2022

Now provides **Hyperlinks** to quickly navigate directly to the action or its asset



Business Rules

Business Rules can **Copy Statistics** from one action to another

The screenshot shows the landfolio 7.3 Demo interface. The top navigation bar includes the Trimble logo, the text 'landfolio 7.3 Demo', and 'landfolio 7.3 Demo (7.4.0 (Development))'. Below this, it states 'This instance is in DEVELOPER mode.' and 'Landfolio Admin (sign out)'. The main content area is titled 'Ontario' and displays project details: Jurisdiction: Ontario, Status: Patented, Project: Matheson 2, Type: ON Claim, Parties: Dimension Mining Inc. (53%), Dimension Mining Canada Ltd (51%), Grant Date: 21 May 2017, Expiry Date: 20 May 2019, and 6 SEC. Below the details is the 'Annual Production Report Stats' section, which has a 'General' tab selected. It shows 'Due Date: 21 August 2015' and 'Period From:'. A 'Statistics' table is displayed with 5 items. The table has columns for 'All', 'Statistic Type', 'Value', 'Commodity', and 'Comment'. The items listed are: Active Time (8 Months), Exported Ore - Weight (100.00 Oz), Annual turnover (12,341,234.00 CAD), Exported Ore - Value (1,234.00 USD), and BEE Rating (Level 8).

landfolio 7.3 Demo (7.4.0 (Development))
Landfolio Admin (sign out)

landfolio 7.3 Demo
This instance is in DEVELOPER mode.

Search < Actions > Edit > Generic < Previous Next > Edit

Ontario

Jurisdiction: Ontario
Status: Patented
Project: Matheson 2

Jurisdiction: Ontario
Type: ON Claim
Parties: Dimension Mining Inc. (53%);
Dimension Mining Canada Ltd (51%)

Grant Date: 21 May 2017
Expiry Date: 20 May 2019
6 SEC

Annual Production Report Stats

General Due Date: 21 August 2015

Documents Period From:

Reference Codes Period To:

Work Accounts

Discussions

Audit

Statistics

There are 5 items in the list

All	Statistic Type	Value	Commodity	Comment
<input type="checkbox"/>	Active Time	8 Months	Aggregates_fr	
<input type="checkbox"/>	Exported Ore - Weight	100.00 Oz	Aggregates_fr	
<input type="checkbox"/>	Annual turnover	12,341,234.00 CAD		
<input type="checkbox"/>	Exported Ore - Value	1,234.00 USD		
<input type="checkbox"/>	BEE Rating	Level 8		



Business Rules

Business Rules can **Copy Structured Data** between Assets & Actions

< License > Details < Previous Next > Edit

Ontario

Jurisdiction: Ontario Jurisdiction: Ontario Grant Date: 12 November 2013
Status: Patented Type: ON Claim Expiry Date:
Project: Parties: Dimension Mining Canada Ltd (51%); Dimension Mining Inc. (49%) 1abc

- General
- Parties (2)
- Address (1)
- Conditions (3)
- Shape (1)
- Map References (2)
- Documents
- Reference Codes (5)
- Commodities
- Agreements (3)
- Groups (2)
- Related Licenses (5)
- Production**
- Actions Open (4)
- Actions Closed (2)
- Work Accounts
- User Roles (3)

Investment Period

There are 1 items in the list.

Start	Period	End	Active	Comments
02 November 2020	2 Years	03 November 2020	Yes	

Production Partners

There are 2 items in the list.

Partner	Period Start Date	Period End Date	Product Weight
Dan Gagnon	13 November 2020	20 November 2020	12.00 Grams
Ewan S. Downie	12 November 2020	17 November 2020	11.00 Grams

Production Reports

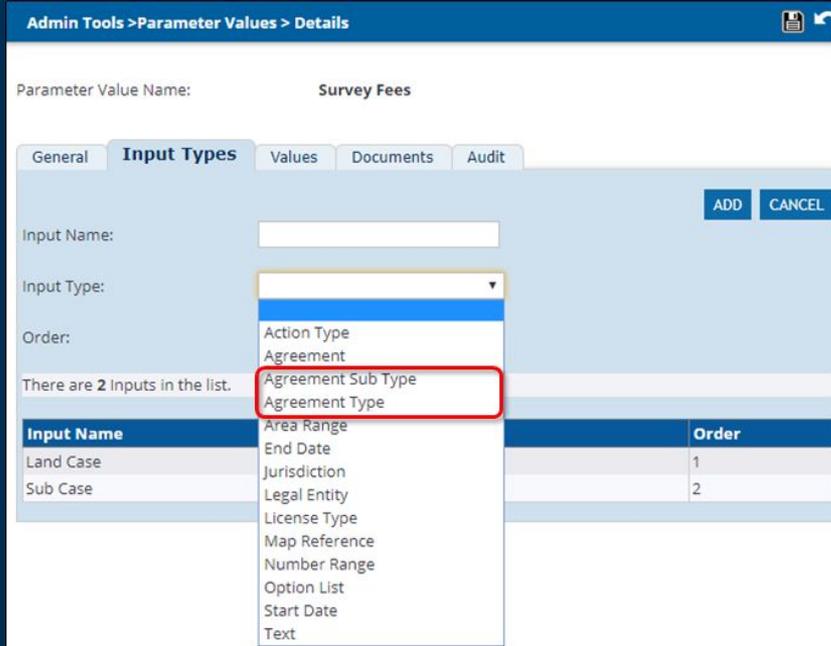
There are 1 items in the list.

Commodity	Ore Extracted (Vol.)	Refined Commodity (Weight)	Assessed Value	Report Period Start Date	Report Period End Date	option list
Gold	200,000.00 Cubic Metres	2.00 Ounces	200,000.00 US Dollar			Option 1



Business Rules

Parameter Values now support **Agreement Type and Sub-Type** as Input Types



Admin Tools > Parameter Values > Details

Parameter Value Name: **Survey Fees**

General **Input Types** Values Documents Audit

Input Name:

Input Type:

Order:

There are 2 Inputs in the list.

Input Name	Order
Land Case	1
Sub Case	2

Allows payment calculations that vary with Agreement Type



Business Rules

Holidays in the calendar can now be specified **per Jurisdiction**

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

When Business Rules schedule actions using **Working Days**, the holiday calendar is used
This now takes the Jurisdiction of the Asset into consideration



Business Rules

Region and **Responsible Office** now available for **Criteria** on Agreement Business Rules

This allows Business Rules to trigger only for specified values



Business Rules

Business Rules can now use **Related Assets**

Update Reference Codes on Related Assets

Use Dates from Related Assets



Business Rules

Use a **Time Interval** from a **Condition** when calculating a Date

Business Rules > Add > Update Land Asset Attributes

Workflow Name: Direct Lease Transfer Abbreviation: 7.1.1. Asset Class: Tenure

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

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

Attribute: Application Date

New Value: Attribute Explicit Value

Today's Date

Add Fixed Offset

Add Relative Offset

Time Span Time Interval

Value:

Action Attribute: [Dropdown]

Action Attribute: Trigger Action

Action Type: Application Submission

Attribute: Action Due Date

Unit:

Action Attribute: [Dropdown]

Action Attribute: Multiple Actions

Action Type: [Dropdown]

Attribute: [Dropdown]

Add Parameter Value Offset



Business Rules

- Business Rules to copy License Term from Granting Action into Condition Value
- Allow the Date to not be specified when updating Reference Codes
- Business Rule support for Updating Reference Codes on Actions



Reports



Reports

Embedded reports can now be configured for Group Types, Companies and Action Types.

The screenshot displays a web interface for managing reports. At the top, a status bar indicates "There are 2 Embedded Reports". Below this is a table with columns for "All", "Edit", "Tab Name", and "Report Schema". Two rows are visible, representing "Embedded Report 1" and "Embedded Report 2". A modal dialog titled "Embedded Report Details" is open, showing fields for "Tab Name" (set to "Embedded Report 2") and "Report Schema" (set to "SSRS Related License X").

All	Edit	Tab Name	Report Schema
<input type="checkbox"/>		Embedded Report 1	SSRS Parties Report
<input type="checkbox"/>		Embedded Report 2	

Embedded Report Details

Tab Name: *

Report Schema: *



Reports

All **Asset Classes** support **Generating Reports** from the Action Details page

Licenses

Agreements

Groups

The screenshot shows the configuration page for a report named 'Toby'. The breadcrumb trail is 'Admin Tools > Report Schema > Edit'. The form contains the following fields and options:

- Name:** Toby
- Description:** Test
- SSRS Report:**
- Report URL:** *
- Active:**
- Administrator Report:**
- Output Formats:**
 - Text
 - Report Viewer
 - EXCEL
 - WORD
 - PDF
- Default Output Format:** PDF
- Search Type:** Action
- Report View Version:** (empty)
- Available on Action Details page**
- Action Type Group:** (empty)
- Action Type:** only on Assets:
- Asset Class:** Agreement
- Asset Type:** Confidentiality Agreement
- Map Reference Category:** (empty)
- Available on Action Search page:**



Reports

- New **Standard Report Tags** available
- Support for **Structured Data** child nodes, including support for formatting (Dates & Numbers) and filtering of results.
- Numeric report tags now support a **decimal and group separator** and can also be used with the Format tag

Group | Region Abbreviation

Group | Responsible Office

Group | Responsible Office Abbreviation

Agreement | Sensitivity

Agreement | Responsible Office Abbreviation

Group | Start Date

Group | End Date

Group | #Reference Code Type# | Value

Group | #Reference Code Type# | Date



Documents



Documents

The new **DMS API** allows new Document Repositories to be added more easily



Documents

Support for **Document Locator** via the DMS API



Documents

Validate that a document has not been altered,
using a **cryptographic signature**

Verify File Signature

This tool will generate a signature for the current file stored in the repository, and compare it to the stored signature that was generated when the file was uploaded through landfolio.

Stored Signature: 36bbe50ed96841d10443bcb670d6554f0a34b761be67ec9c4a8ad2c0c44ca42c
Generated Signature: 36bbe50ed96841d10443bcb670d6554f0a34b761be67ec9c4a8ad2c0c44ca42c

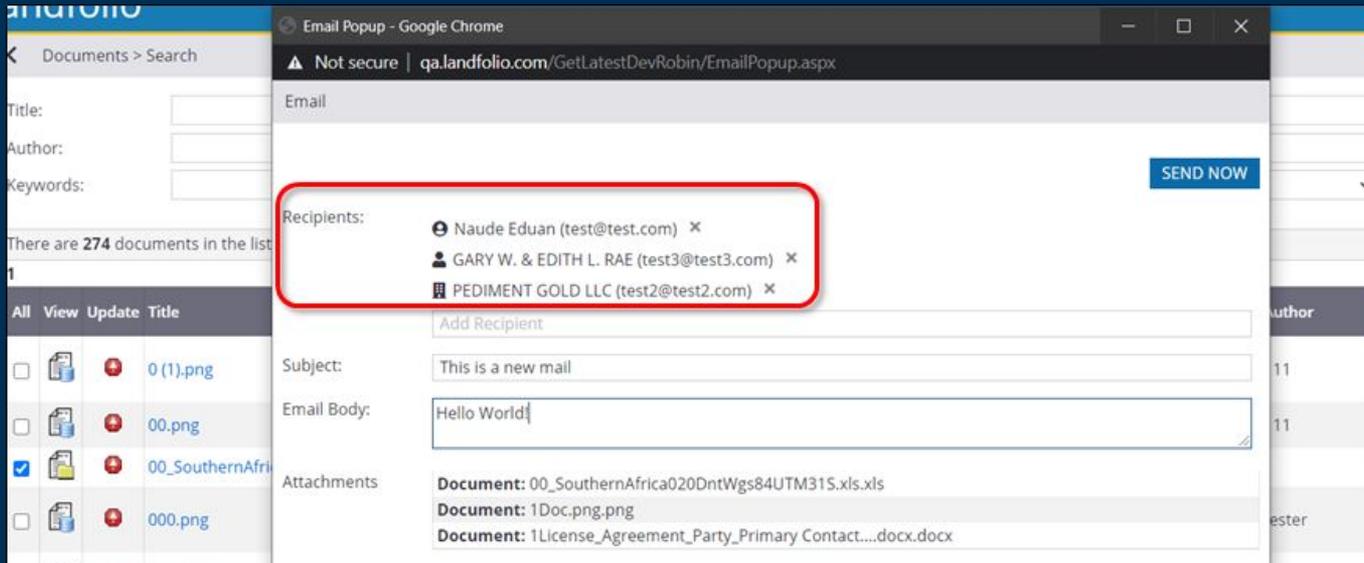
 Signatures match. The file is unchanged since it was uploaded through landfolio

OK

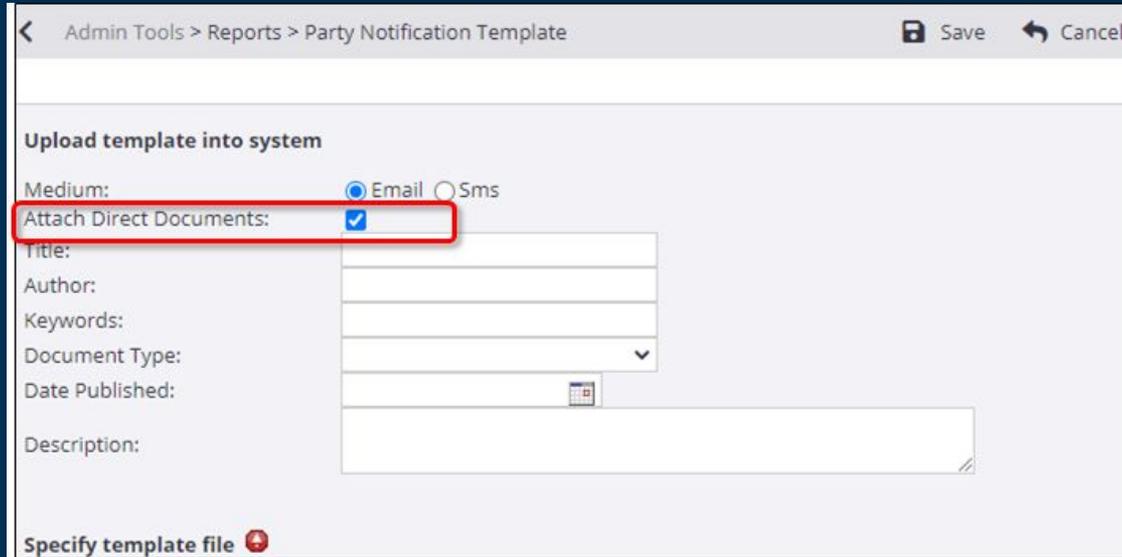


Documents

Email documents as attachments to **Companies & People** registered in landfolio



Documents



Admin Tools > Reports > Party Notification Template

Save Cancel

Upload template into system

Medium: Email Sms

Attach Direct Documents:

Title:

Author:

Keywords:

Document Type:

Date Published:

Description:

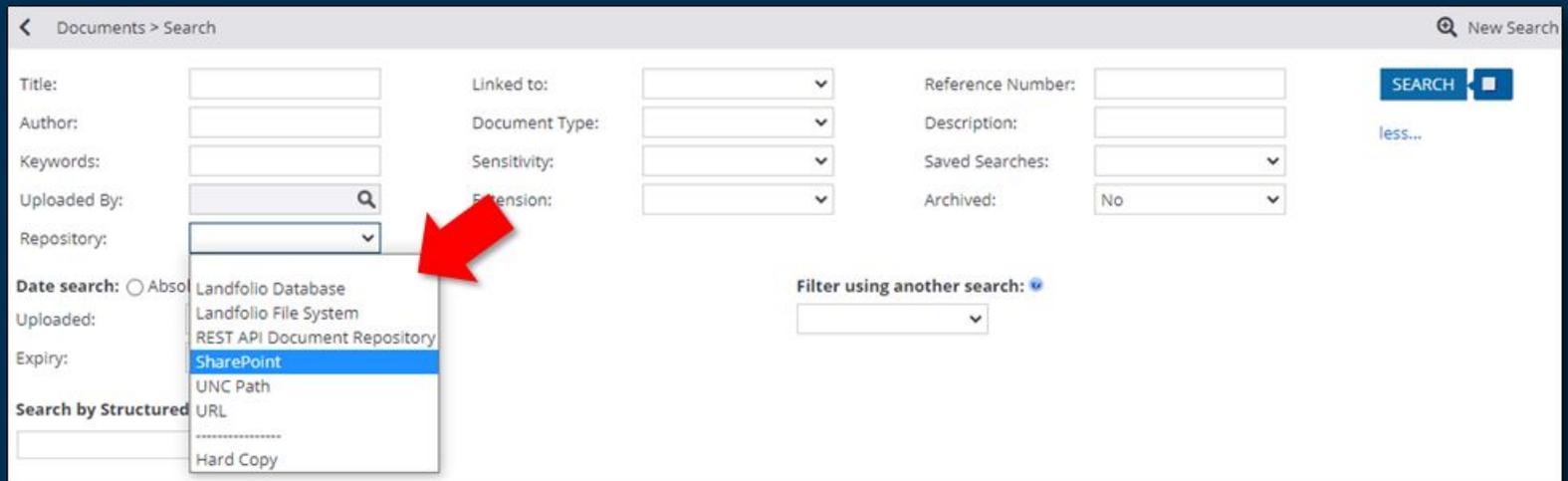
Specify template file 

Attach Documents to emails sent for **Action Notifications** to users or parties



Documents

Search for documents based on the **Document Repository** in which they are stored



The screenshot shows a search interface for documents. The 'Repository' dropdown menu is open, displaying the following options: Landfollo Database, Landfollo File System, REST API Document Repository, **SharePoint** (highlighted in blue), UNC Path, URL, -----, and Hard Copy. A red arrow points to the 'SharePoint' option. The search criteria include Title, Author, Keywords, Uploaded By, Repository, Date search (Absolute), Expiry, Search by Structured, Linked to, Document Type, Sensitivity, Extension, Reference Number, Description, Saved Searches, Archived, and Filter using another search. A 'SEARCH' button is visible in the top right corner.



Documents

Indirect Documents can now
be displayed on **Groups**

Already available on:

- Actions
- Licenses
- Agreements

Admin Tools > Application Settings > Indirect Documents 

Actions	
Action Types	<input checked="" type="checkbox"/>
Land Assets	<input type="checkbox"/>
Land Cases	<input type="checkbox"/>
Groups	<input checked="" type="checkbox"/>

Land Cases	
Actions	<input checked="" type="checkbox"/>
Land Assets	<input type="checkbox"/>
Related Land Cases	<input type="checkbox"/>
Groups	<input checked="" type="checkbox"/>
Parties	<input type="checkbox"/>

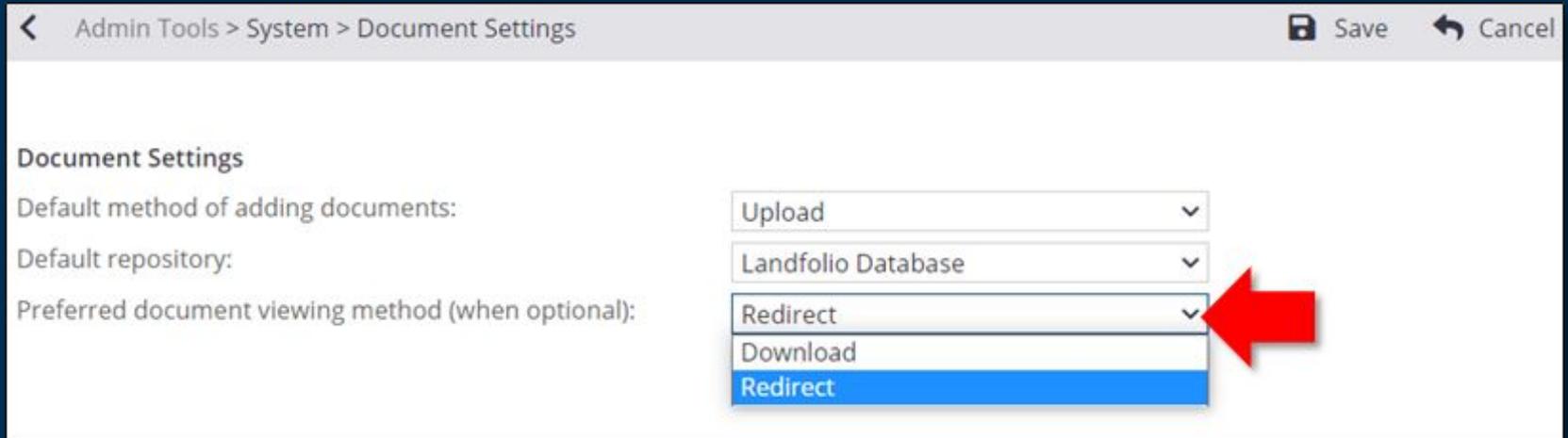
Groups	
Actions	<input type="checkbox"/>
Licenses	<input type="checkbox"/>
Agreements	<input type="checkbox"/>
Related Groups	<input type="checkbox"/>
Parties	<input type="checkbox"/>

Map	
Include in map selection search	<input checked="" type="checkbox"/>



Documents

Configure a **Default View Method** for Repositories that support both Download & Redirect



Admin Tools > System > Document Settings

Save Cancel

Document Settings

Default method of adding documents: Upload

Default repository: Landfolio Database

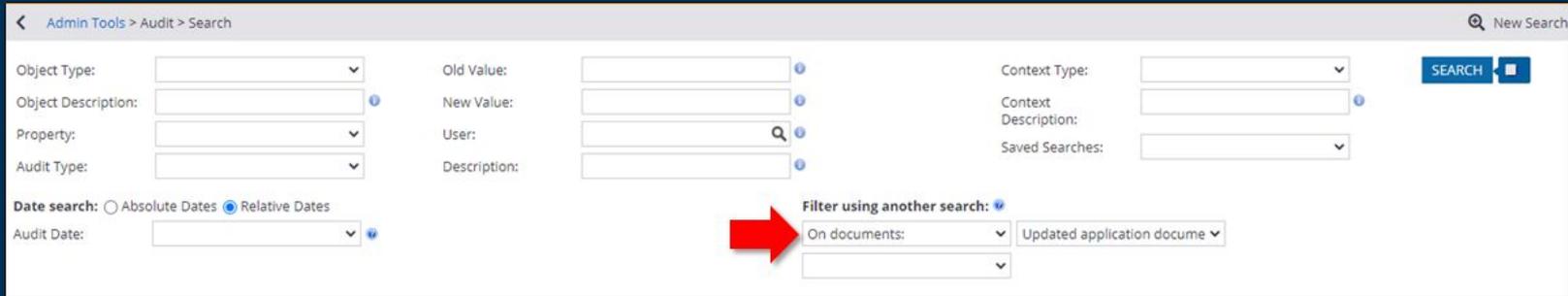
Preferred document viewing method (when optional):

- Redirect
- Download
- Redirect



Documents

Audit Searches can be filtered to records related to a **Document Search**



The screenshot shows the 'Admin Tools > Audit > Search' interface. It features several search criteria fields: Object Type, Object Description, Property, Audit Type, Date search (Absolute Dates or Relative Dates), Audit Date, Old Value, New Value, User, Description, Context Type, Context Description, and Saved Searches. A 'SEARCH' button is located on the right. A red arrow points to the 'Filter using another search:' section, which includes a dropdown menu for 'On documents:' and a text input field containing 'Updated application docume'.

Typically used for Web Hooks integrations with a Document Repository



Documents

Edit document library OK CANCEL

Name:

Sharepoint Library Folder: BROWSE

Document Location

1 2

Name	Document library	Folder Path
Reserves - BSW	Reserves - BSW	
Parcels - Barwon South West	Parcels - Barwon South West	
Reserves	Reserves	ReserveTesting
Crown Parcels	Crown Parcels	

SharePoint supports using **Sub Folders** as Named Locations

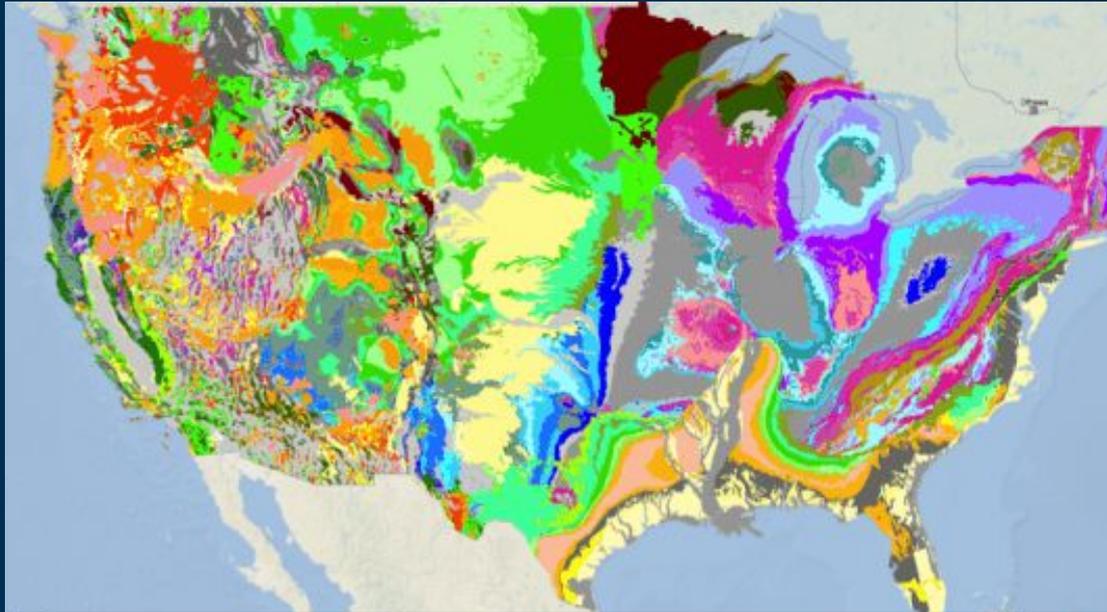


GIS & Maps



GIS & Maps

Landfolio can display **WMS and WFS** Map Services



Supports full functionality including identify, search and select

Both Esri & GeoServer formats with Authentication



GIS & Maps

Configure the **Default Visibility** of any **Layer** in a Map

Hidden

Not visible by default

Visible by default

Web Map Service

Map Layer

General Templates

Map Layer Name: LandfolloBAWorkIDL712.SpatialViews.LicensePolygonParts

Visibility: ▼ *

- Hidden
- Visible By Default
- Not Visible By Default

Object Type: Web Map Service

Allow Identify:

Allow Selection:

Allow Search:

ID Field: Part *

Quick Search Fields: Code

Select quick search fields

1 2 3

Use	Search Field
<input type="checkbox"/>	AccCode
<input type="checkbox"/>	ApplNo
<input type="checkbox"/>	Archived
<input type="checkbox"/>	AreaUnit
<input type="checkbox"/>	CalculatedAreaUnit
<input checked="" type="checkbox"/>	Code
<input type="checkbox"/>	Comments
<input type="checkbox"/>	Commodities
<input type="checkbox"/>	CommoditiesCd
<input type="checkbox"/>	Group1

1 2 3

OK CANCEL



GIS & Maps

Upgraded to Esri **ArcGIS Server 10.9.1**



Part of ongoing efforts to ensure **cybersecurity**, by removing or upgrading unsupported or vulnerable 3rd party libraries



GIS & Maps

Support for **Map Services** using a **Separate Authentication** service

Authentication:

No authentication
 Requires authentication

Type: Token

Specify authentication service URL (if different from the Base ArcGIS Server):

RestURL 10.3 * eg. http://domain/site

https://sdrsa-ser08/http://sdrsa34/arcgis

Specify credentials (if different from the Base ArcGIS Server credentials):

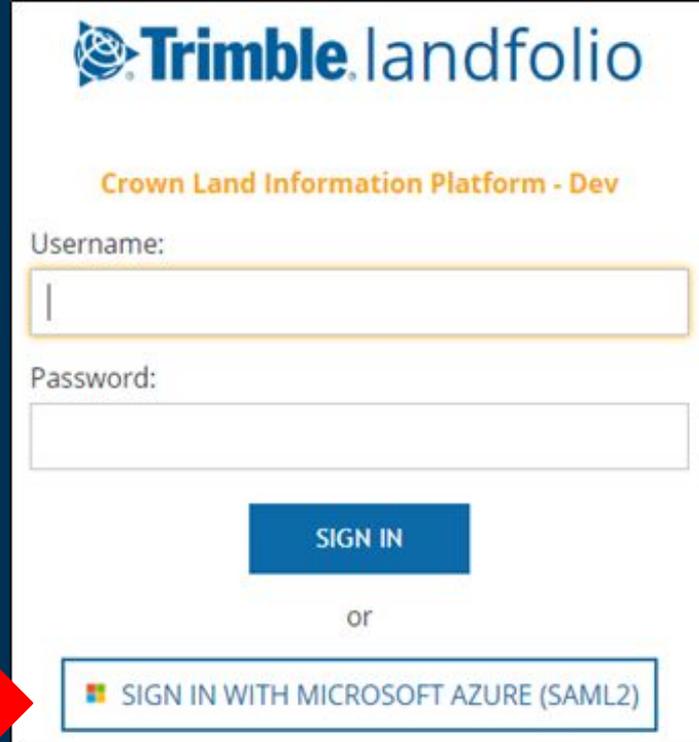


Users & Security



Users & Security

Users can now **Sign In** using an external Identity Provider with **SAML 2** support

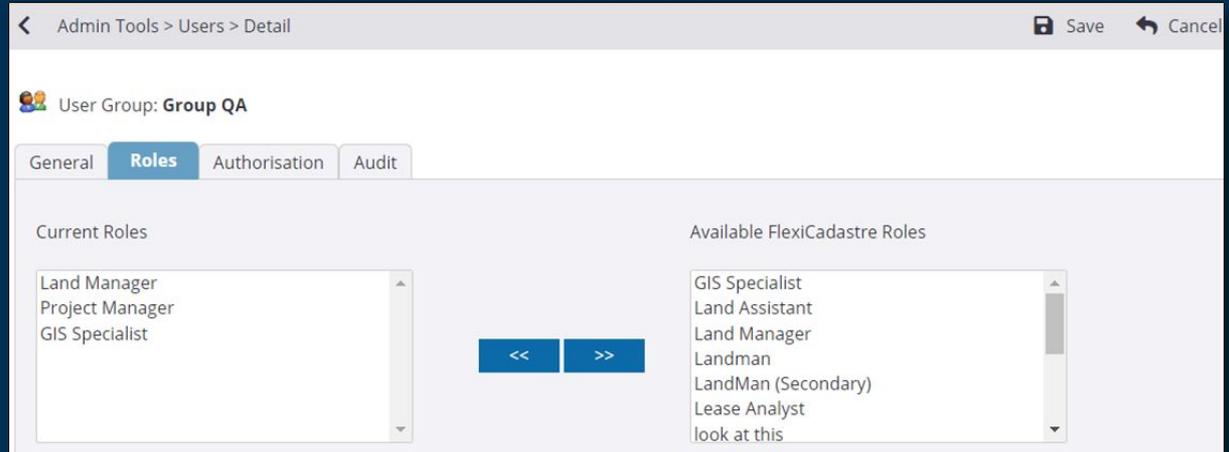


The screenshot shows the login interface for Trimble landfolio. At the top left is the Trimble logo, followed by the text "landfolio". Below this is the subtitle "Crown Land Information Platform - Dev". The form contains two input fields: "Username:" and "Password:". Below the password field is a blue "SIGN IN" button. Underneath the button is the word "or". At the bottom of the form is a button labeled "SIGN IN WITH MICROSOFT AZURE (SAML2)", which is highlighted with a red arrow pointing to it from the left.



User & Security

User Groups can now have **Roles** assigned to them in the same way as individual users

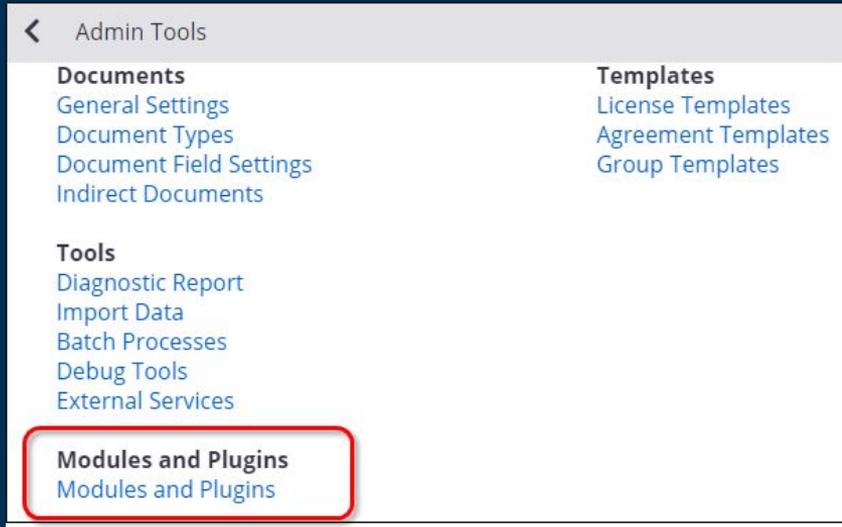


Admin Tools



Admin Tools

A new Admin Tools page for **Modules and Plugins** allows users to see and manage available functionality more easily



Admin Tools

< Admin Tools > Application Modules > Module Plugins

Application Module: **Bulk Productivity Module**

Bulk Productivity Module

Enabled:

There are **11** active plugins in the list

1

Section	Plugin	Instance Name	Instance Description
	Action Importer	Action Importer	Action Import Configuration
	Agreement Importer	Agreement Importer	Agreement Import Configuration
	Bulk Document Importer	Bulk Document Importer	Bulk Document Importer
Wizards	Bulk License Wizard	Bulk License Wizard	A wizard for creating multiple new licenses
Shape Editor Tools	Grid Splitter Plugin	Grid Splitter	Tool to split shapes into blocks with a grid
	Work Commitment Detail Importer	Importador de Medição de Cargas	Imports details onto existing Work Commitment Actions
	License Importer	License Importer	License Import Configuration
	Party Importer	Party Importer	Group Party Import Configuration
	Party Importer	Party Importer	Agreement Party Import Configuration
	Party Importer	Party Importer	License Party Import Configuration
Exports	Scheduled Action Exporter	Scheduled Action Exporter	Scheduled Generic Action Exporter

1

There are **2** inactive plugins in the list

1

Section	Plugin	Instance Name	Instance Description
	Construct a Shape from a Reference Point	Construct a Shape from a Reference Point	Tool to construct a shape from a reference point
Imports	Scheduled Action Importer	Scheduled Action Importer	Schedule Generic Action Importer

1

Modules are licensed sets of additional functions

Plugins are individual functions within a module that can be enabled & configured

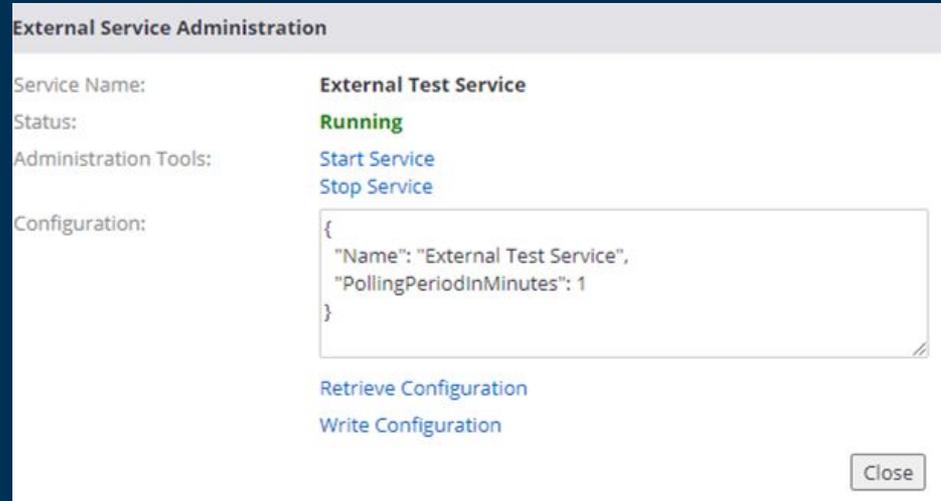


Admin Tools

A new **External Service Admin Tools** page allows administrators to **Configure, Manage, and Monitor** external services that support the API

- ShapeSync Tool
- WebHooks
- SharePoint Integration Services
- more...

The service's config file can be edited, and the service restarted



The screenshot shows a web interface titled "External Service Administration". It displays the following information for the "External Test Service":

- Service Name:** External Test Service
- Status:** Running
- Administration Tools:** Start Service, Stop Service
- Configuration:** A text area containing a JSON configuration:

```
{  "Name": "External Test Service",  "PollingPeriodInMinutes": 1}
```
- Buttons:** Retrieve Configuration, Write Configuration
- Close Button:** A button labeled "Close" in the bottom right corner.



Admin Tools

Companies can now be enabled as **Participants in Discussions**

Land Asset > Details

Reserve - test

Parties: HORSHAM RURAL CITY COUNCIL Official Area: 32.3241 Ha Reserves - Tenure Code:

General | Participants | Activities/Uses | Historic Usage | Actions Closed

NEW DISCUSSION

test training

Antonia called

Stuart called

Antonia called

Participants

Every participant will receive an email notification with each new comment added to the discussion.

lan Brumfitt ✕

Carolyn Holness ✕

park

- Victoria Violet PARKER
- WADHAM PARK THOUGHTBREDS
- Wayne Sparkes
- WILLIAM PARKINSON
- WILLIAM ROY PARKER
- YARRA VALLEY PARK LANE HOLIDAY
- AC DEERE & SJ PARK**
- ACROSS AUSTRALIA PARKS & RESORTS PTY LTD**
- AF LOMBARDI & CD PARKER
- AH & HR PARKER
- AJ & SA PARKER

Email **notifications** are sent to the company's **representatives**



Admin Tools

Email log has additional **Search Criteria**

Admin Tools > Audit > Email Log New Search

Email Address:

From: 

To: 

Subject:

Sent Successfully: No

Has Attachments:

There are **215813** Emails in the list
[1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#) [9](#) [10](#) ...

Email Address	Description	Subject	Date Sent	Sent Successfully
zandile_yokwana@trimble.com	Document(s) mailed by user FlexiCadastré ADMIN.	Application Forms	12/07/2020 13:12:58	
landadmin_support@trimble.com	Threaded Exception	Exception: Scheduled Action Importer failed to load.	28/01/2020 12:39:42	
landadmin_support@trimble.com	Threaded Exception	Exception: Scheduled Action Importer failed to load.	27/01/2020 07:39:36	
landadmin_support@trimble.com	Threaded Exception	Exception: Scheduled Action Importer failed to load.	26/01/2020 02:39:34	

- Subject
- Sent Successfully
- Has Attachments



Admin Tools

Email log now includes titles and file names of **Attachments**

The screenshot shows the 'Admin Tools > Audit > Email Log' interface. A modal window titled 'Application Forms' is open, displaying an email from 'zandile_yokwana@trimble.com' sent on '7/12/2020 1:12:58 PM'. The email body contains the text: 'Hi, Please see the attached documents required for the new License Application. Kind regards, John Smith' and 'Sent by FlexiCadastrre ADMIN (duane_harvey@spatialdimension.com) from Landfollo.' Below the email body, a red dashed box highlights a section titled 'There are 4 Documents Attached' which contains a table with the following data:

Title	Document Type	Document Location	Document Size
Action Import data.png		Landfollo Database (Action Import data.png)	6.00 KB
Action Template.docx	Template	Landfollo Database (Adnan Test: Case 29417)	14.00 KB
AgreementListTag.docx	Receipt	Landfollo Database (AgreementListTag.docx)	13.00 KB
Beta License importer123.xlsx	new DT	Landfollo Database (Beta License importer123.xlsx)	10.00 KB

The background interface shows a list of email addresses, with 'zandile_yokwana@trimble.com' highlighted. The bottom right of the modal has an 'OK' button.

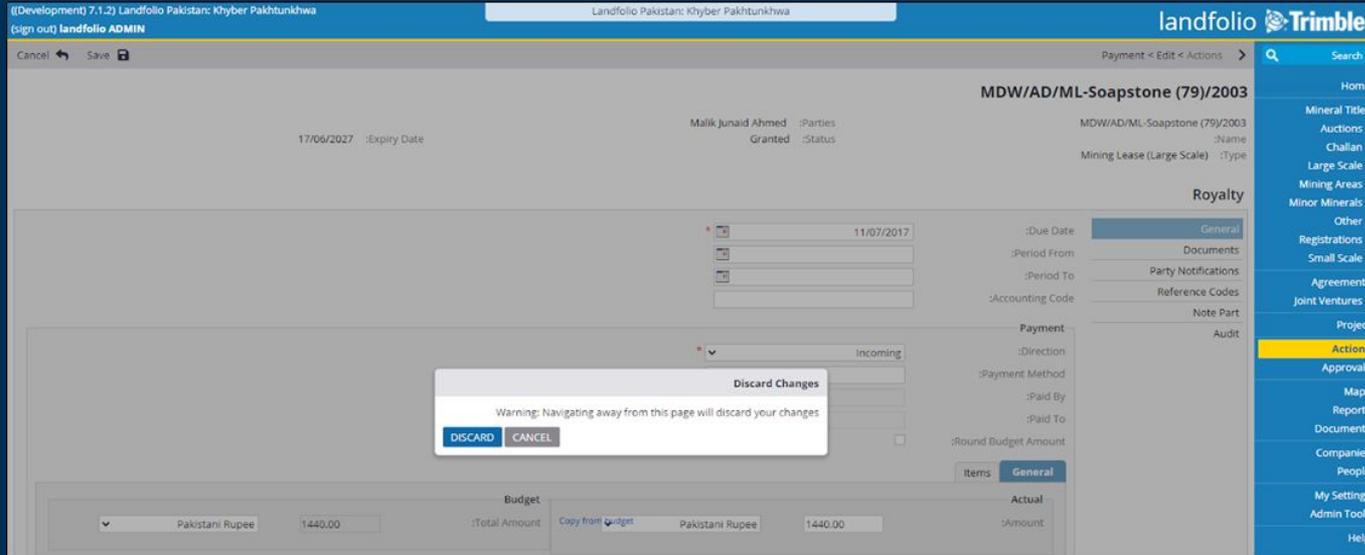


User Interface



User Interface

Right-to-Left Back Office interface



umm al-Qura Arabic calendar support



User Interface

Additional **Lookup Tables** support full **Multilingual** translation

Party Types
Company Types
Company Status
Company Position
Countries
Commodity Groups



User Interface

User selectable **Tab** or **Side Menu** layout options

Trimble landfolio QA Development Version

Search License > Details

1\PP2084 Type: Patented Claim ON
Application Date: 12-Sep-2014 Status: Active
Code: 1\PP2084 Official Area: 1 271 Ha

- Home
- Licenses
- Fee Property
- Other Interests
- Patented Claims**
- Agreements
- Agricultural
- Encumbrance
- Agreement
- Agreement New

General Parties (1) Conditions (1) Shape (1) Map References (2)

Code: 1\PP2084 Name:
Jurisdiction: Ontario
Type: Patented Claim ON (Ontario) Application Number:
Status: Active Old Code:
Interest: ORR Accounting Code:

QA Development Version

Type: Patented Claim ON
Status: Active
Official Area: 1 271 Ha

Code: 1\PP2084

General Parties (1) Conditions (1) Shape (1) Map References (2) Documents (1) Reference Codes Commodities Agreements

Actions Open (6) Actions Closed (2) Work Accounts Roles (2) Discussions Audit

Code: 1\PP2084 Name:
Jurisdiction: Ontario
Type: Patented Claim ON (Ontario) Application Number:
Status: Active Old Code:

User Interface

Configure the **Display Order of Tabs** on all **Details Pages**

The screenshot displays two overlapping windows from an application. The background window is titled 'Admin Tools > System Types > License Types > View' and shows a 'Tab/Wizard Step' configuration table for 'New License'. The foreground window is titled 'License > Details' and shows the details for license '1\PP2084'. In the foreground window, the 'General' tab is selected, and the 'Production' and 'VEAC' tabs are highlighted with red boxes, indicating they are the focus of the configuration.

Tab/Wizard Step	Application	Active	Inactive
General	Available		
Parties	Required		
Documents	Not Used		
Conditions	Not Used		
Shape	Available		
Map Reference	Not Used		
Reference Codes	Not Used		

License > Details

1\PP2084

1\PP2084 Type: Patented Claim ON
Application Date: 12-Sep-2014 Status: Active
Code: 1\PP2084 Official Area: 1 271 Ha

General	Code:	1\PP2084
Production	Jurisdiction:	Ontario
Parties (1)	Type:	Patented Claim ON (Ontario)
VEAC	Status:	Active
Conditions (1)	Interest:	ORR
Shape (1)	Region:	North America
Map References (2)	Responsible Office:	

Including Structured Data & Embedded Report Tabs

Applies to Wizard Steps too



Landfolio API



Presented By:
Nick Holleman, Head of R&D

What's New in Landfolio

7.0 and 7.2