

# LeaseControl Group Reporting Quick Guide

January 2022

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## Version History

Version	Date	Person	File Name
1.0	January 2022	P Mischler	LeaseControl Group Reporting Quick Guide

### 1.0 Overview

LeaseControl has functionality to assist you in managing administration and updates of Group Reports. Rather than having to update each tenement individually, tenements in a group report can be updated in bulk.

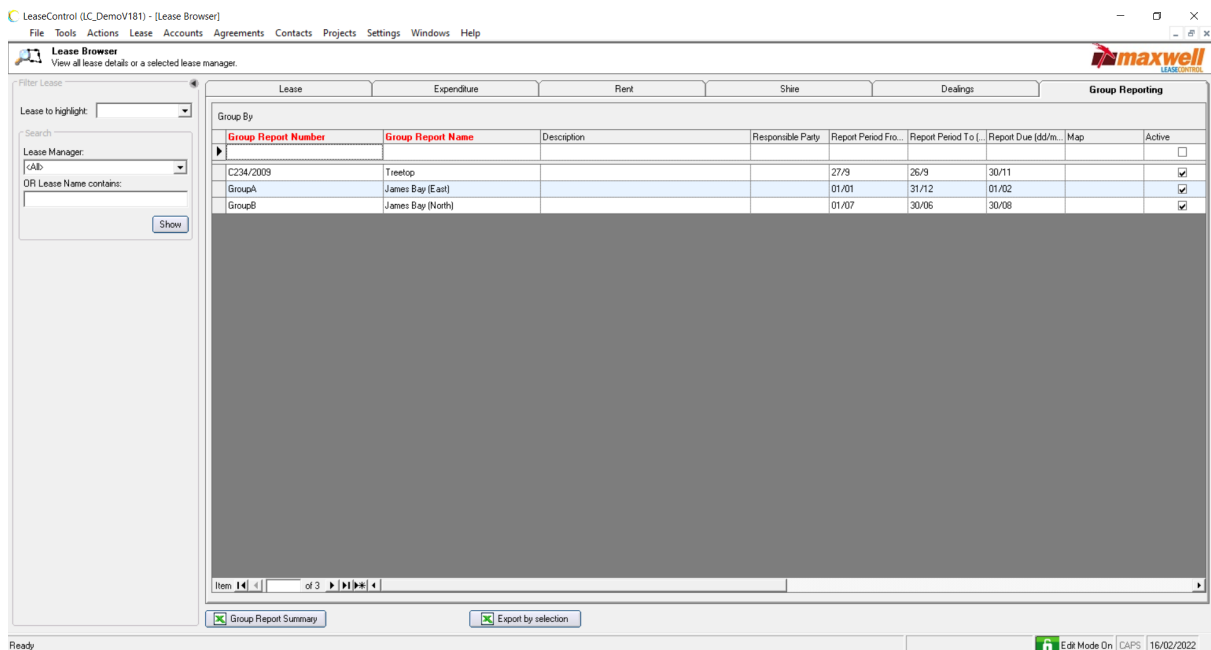
This Quick Guide is designed to get you started setting up and using group reporting. Further information can be found in the LeaseControl Administrators Guide or contact [servicedesk@maxgeo.com](mailto:servicedesk@maxgeo.com) for a copy.

### 2.0 Group Reporting

#### 2.1. Report Group creation

- Navigate to the Lease Browser - Lease (in taskbar) then down to Browse
- Open Group Reporting tab - right of screen
- Enter your new Report Group record in the blank line at the top of the grid, just below the column headers and hit enter to save the record.
- Make sure you have filled out the following columns at a minimum:
  - Group Report Number
  - Group Report Name
  - Report Due
- Make your new Report Group active by checking the Active box for the record

**Tip:** Check Edit Mode (bottom right of screen) is on for you to enter your new Report Group.



### 2.2. Report Group tenement assignment

- Navigate to the individual Lease Record e.g. AL00244, by returning to the Lease tab in the Lease Browser and double-clicking the appropriate lease record in the grid
- Open the Legal tab – middle and center of screen
- Select the appropriate Group Report from the drop-down box and hit enter to save the record
- Hit Apply and Ok to commit the change to the system.

Note – you can assign tenements to multiple group reports.

#### Tips:

1. Check Edit Mode (bottom right of screen) is on for you to select your Report Group from the drop-down box.
2. If your Report Group does not appear in the drop-down, double check that the Report Group is active in the Lease Browser Group Reporting tab.
3. If you would like to quickly check which tenements are assigned to a Report Group –run the Group Report Summary extract from the Group Report tab in the Lease Browser.

The screenshot displays the 'Edit Lease - AL00244' window in the LeaseControl software. The interface is organized into several functional areas:

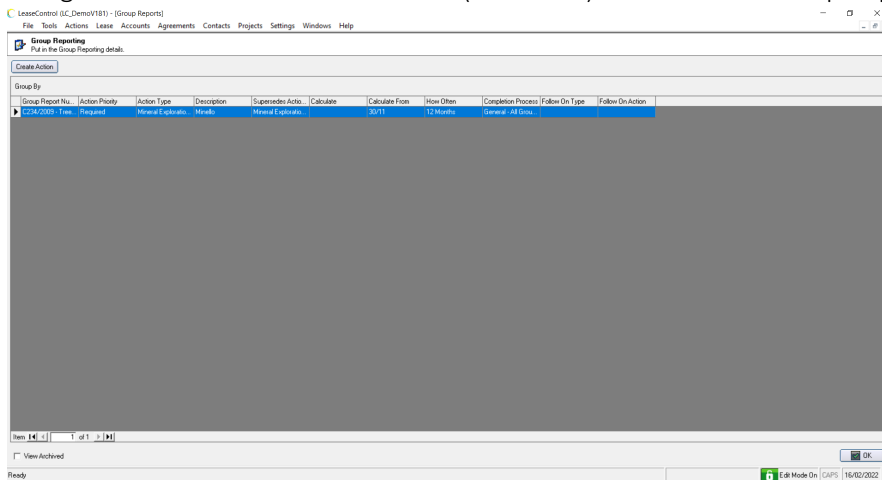
- Lease Details:** Includes fields for Lease (AL00244), Lease Name, Locality (NSW), Project, Region (Bowen Basin), and Lease Type (AL - Assessment Lease (NSW)).
- Lease Dates:** Shows Application (5/09/1900), Granted (6/09/2012), and Expiry (6/09/2018) dates.
- Lease Contacts:** Lists Lease Manager (MaxWell M), Managing Company (MaxWell CO), Operator (Max Well CO), and Responsible Parties.
- Lease Commitment:** Displays financial commitments for Year Ending 2021, 2022, 2017, and 2018.
- Area Details:** Shows Area Unit (Haclares), Current Area Held (4), Area Applied For (4), and Granted Area (4).
- Reporting Group:** The active section, featuring a 'Group Report' dropdown and a list of available groups, such as 'GroupA - James B...'. A search bar is also present.

The status bar at the bottom indicates 'Ready', 'Edit Mode On', and the date '16/02/2022'. Navigation buttons like 'Copy', 'Rename', 'Full Tenement Summary', 'Audit Report', and 'Exemption Report' are visible at the bottom left.

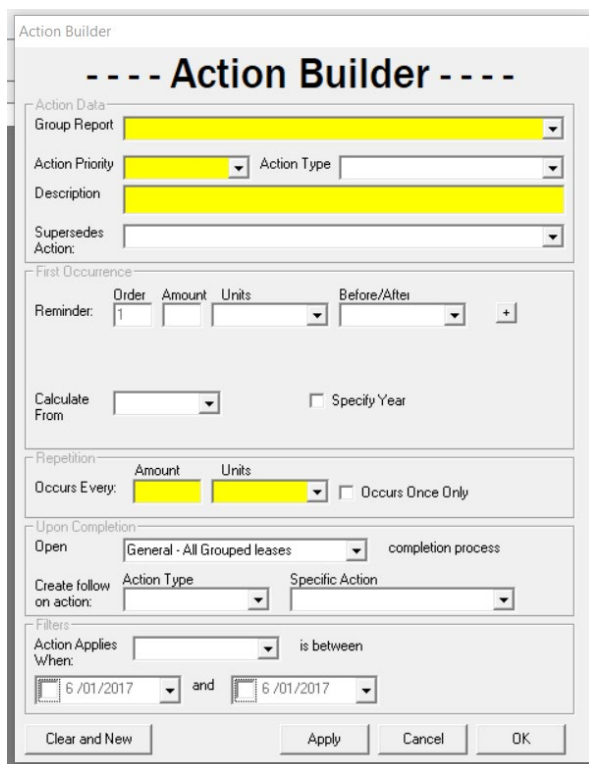
### 2.3. Report Group Action creation

This action will supersede any individual lease action that you have configured.

- Navigate to the Lease Browser - Lease (in taskbar) then down to Group Reporting



- Select Create Action and enter your action configuration. Note differences between the regular action builder and this builder.
  - Firstly, that you are applying this action per Report Group and not by lease type
  - Secondly, that you are selecting an action type to supersede another. I.e., a Combined Report to supersede a Single Report
  - Thirdly, that you are utilising the all grouped leases completion process to update all appropriate tenements at the same time upon completion of the group action



As an example, and assuming understanding of the generic LeaseControl action workflow, the following graphically depicts how Group Actions and single actions co-exist in the system

