



Exploration Archives 4.5

License

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1.0 License

New in this version:

- » The License Editor has been modified to use the new ESRI Geometry Editor.
- » The Map Selection tools and Cutout Tools have been updated to reflect the new Geometry Editor

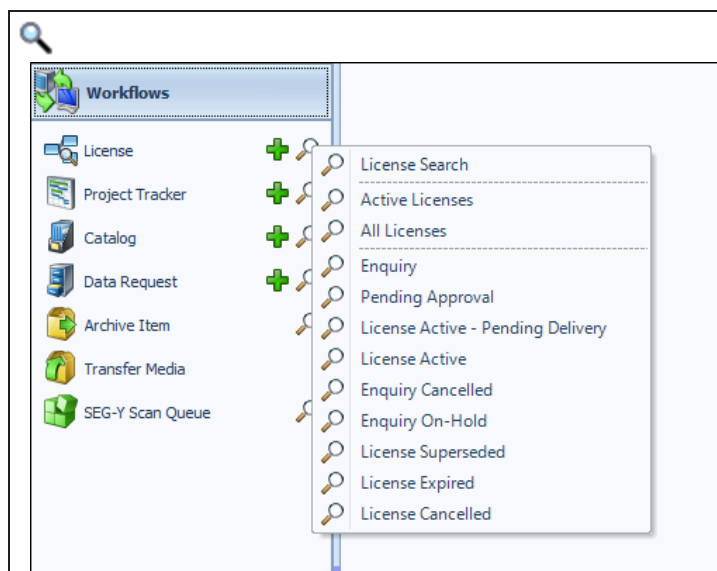
The License module includes a full spectrum of options and resources to manage your data license workflow and monitor progress.

A variety of features and tools are available to create, modify and query data licenses.

The information you add to a license in Exploration Archives provides or initiates all the necessary deliverables for the transaction. The License module calculates fees according to the coverage area that you define using the cutout tool, while the document tool generates the contract and license documentation.

To generate a search and open items in the License module:

1. Click **search** next to **License** in the Navigation panel.



2. Select the appropriate search type and the search window will open
3. Enter your values and click **Search**.

The results open in the **License** module. The grid displays the information for each item. To view the **Related Records** for an item, click on a row in the grid and the associated details display in the **Related Records** tabs.

To view the **Related Records** for multiple items, turn on **Bulk Mode**, select multiple items in the **Grid** and the associated information for all selected items display in the **Related Records** tabs.

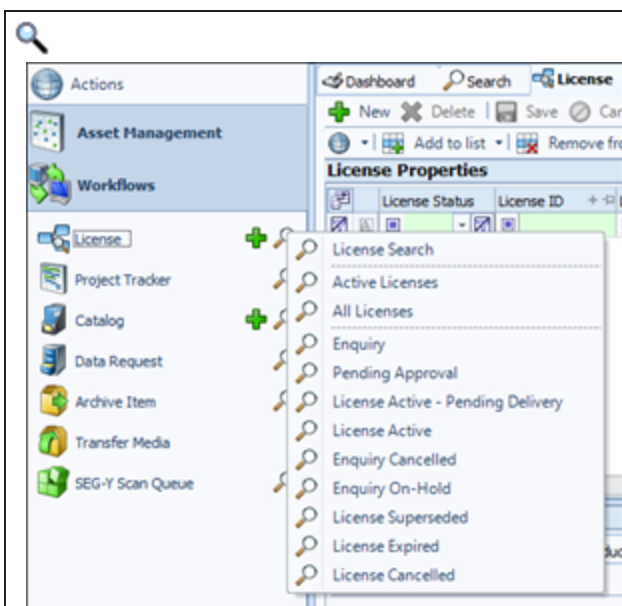
For information regarding status searches, refer to [Understanding license statuses](#).

The License module includes a full spectrum of options and resources to manage your data license workflow and monitor progress. A variety of features and tools are available to create, modify and query data licenses.

The License module is accessible in the navigation panel under **Workflows**.

The information you add to a license in Exploration Archives provides or initiates all the necessary deliverables for the transaction. The License module calculates fees according to the coverage area that you define using the cutout tool, while the document tool generates the contract and license documentation.

To open items in the **License** module:



1. Click **search** next to **License** in the Navigation panel.
2. Select the appropriate search type and the search window will open
3. Enter your filter values and click **Search**.

The results open in the **License** module. The grid displays the information for each item. To view the **Related Records** for an item, click on a row in the grid and the associated details display in the **Related Records** tabs.

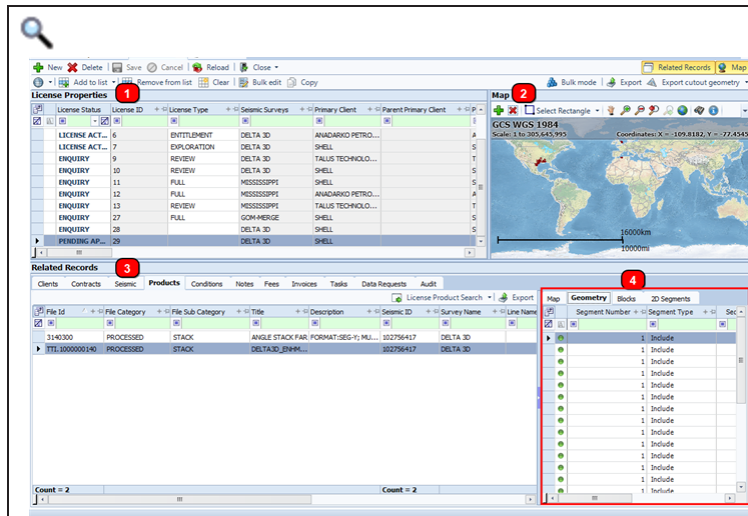
To view the **Related Records** for multiple items, turn on **Bulk Mode**, select multiple items in the **Grid** grid and the associated information for all selected items display in the **Related Records** tabs.

For information regarding status searches, refer to [Understanding license statuses](#).

2.0 Understand the screen layout

The **License** module is for viewing and managing licenses. The main screen of the License module provides a view of the information related to the licenses from your search criteria. In addition to the main view, the module has an **Editor View** and a full screen view. For information about the **Editor View**, refer to "Create a license" on page 9.

The main view is split into the following panes:

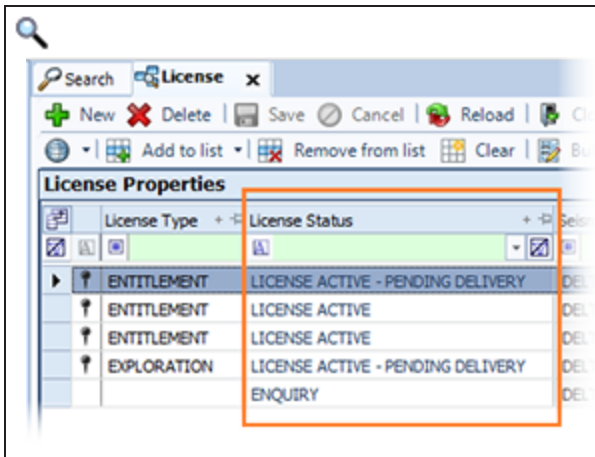


- 1. License Properties grid:** Lists the licenses with the associated detail across various columns.
- 2. Map:** Displays the location of licensed data.
- 3. Related Records:** Displays information for the selected license in the License Properties grid. The Related Records panel includes several tabs with different categories of information.
- 4. The Products tab in the Related records panel** includes a set of secondary tabs for viewing detail related to a selected product.

3.0 License statuses

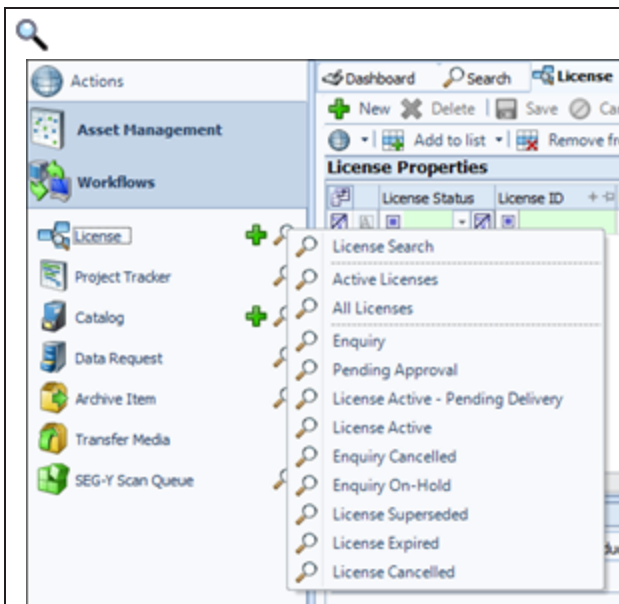
The **license status** indicates the progress of a license.

The status of a license displays in the License Status column of the License Properties grid.



You can use the search option to search all licenses, or according to status.

To use the status search, click search next to License and click a status category to open the search window.



The statuses available for the working phase of a license include:

- » **Enquiry:** This is the initial status for a newly created license. The sales associate is collecting information and specifying the license details, monitoring tasks and generating the required documentation. After entering all required information, the license is ready for the *Pending Approval* status.
- » **Pending Approval:** At this stage, the user generates and sends a proposal and license agreement to the client for approval. If the client does not approve the license agreement, you can recall the license back to the *Enquiry* status to modify the information. After the client approves the license agreement, change the license status to *License Active - Pending Delivery*
- » **License Active - Pending Delivery:** The client has reviewed and approved the license agreement. Details have transferred to a Data Request for preparation.
- » **License Active:** Client has received the data.

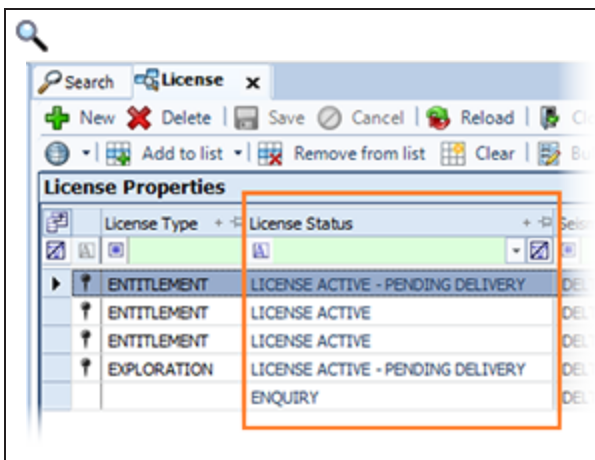
Aside from the typical working statuses, the License module includes several alternative end-case statuses:

- » **Enquiry Cancelled:** Cancelled, information saved.
- » **Enquiry On-Hold:** On hold with the option to progress in the future.
- » **License Superseded:** License has been replaced.
- » **License Expired:** Expiration date has passed, if expiry was set.
- » **License Cancelled:** License has been cancelled.

To change a license status, refer to "Updating a license status" on page 8.

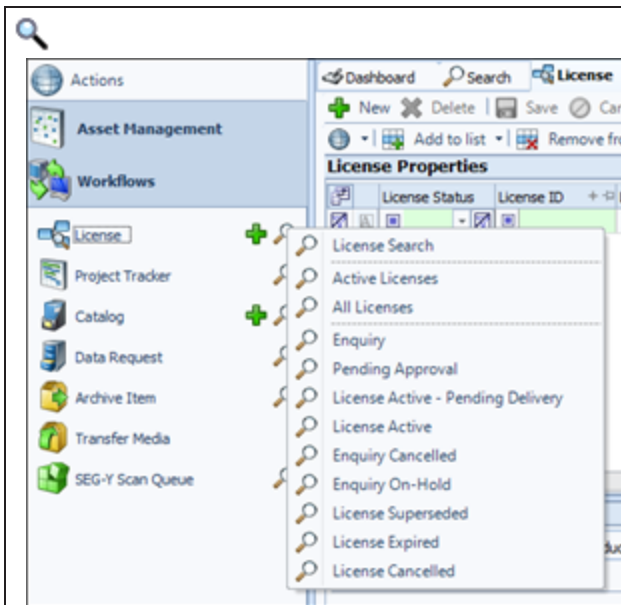
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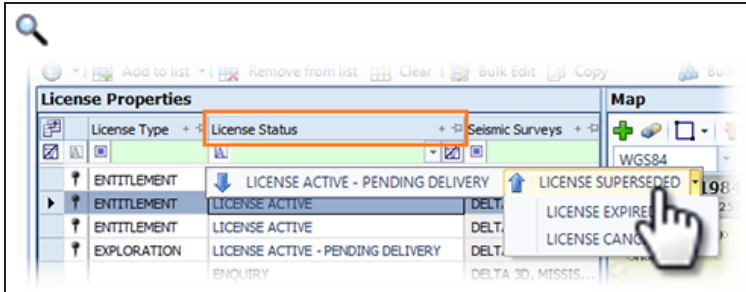
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- » **License Cancelled:** License has been cancelled.

To change a license status, refer to "Updating a license status" on the next page.

3.1 Updating a license status

The license status indicates the progress of a license. To update the status of a license, locate the license in the **License Properties** grid of the License module. Click in the cell of the **License Status** column to open the status options. Click the new status for the license and **Save**.



To access this functionality, you must have permission for changing a license status added to your profile. Your administrator sets the user securities for the license status functionality.

**Note:**

The status options available are restricted by your company's workflow. Not all statuses are available from the current status of a license.

4.0 Create a license

The **License** module maintains the current information for each license. Included with the **License** module is the **Editor View** for creating and editing licenses. You must open the **Editor View** to add or edit detail in the **License Properties** area, and the **Seismic** tab and **Products** tab of the **Related Records**.

To create a new license:

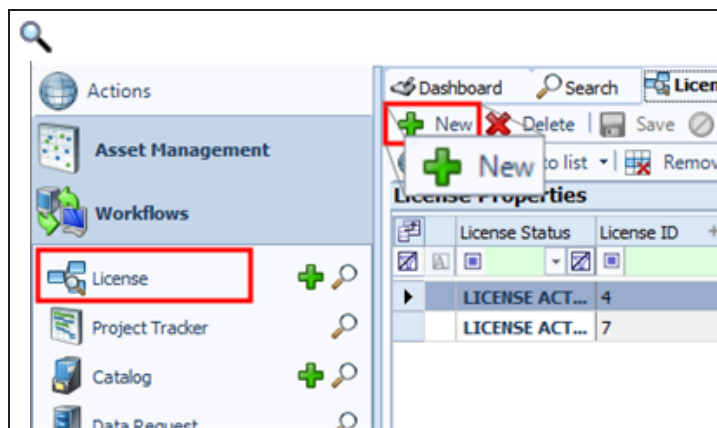
Creating a new license opens the **Editor View** with a blank record.

The tasks for creating a license involve:

- » Adding general information to the **License Properties** grid.
- » Adding seismic and associated products.
- » Creating the cutouts.

To begin a new license and add the general information:

1. Click **License** in the navigation panel to open the module.
2. Click **New** in the workspace toolbar and the **Editor View** opens in a new tab.

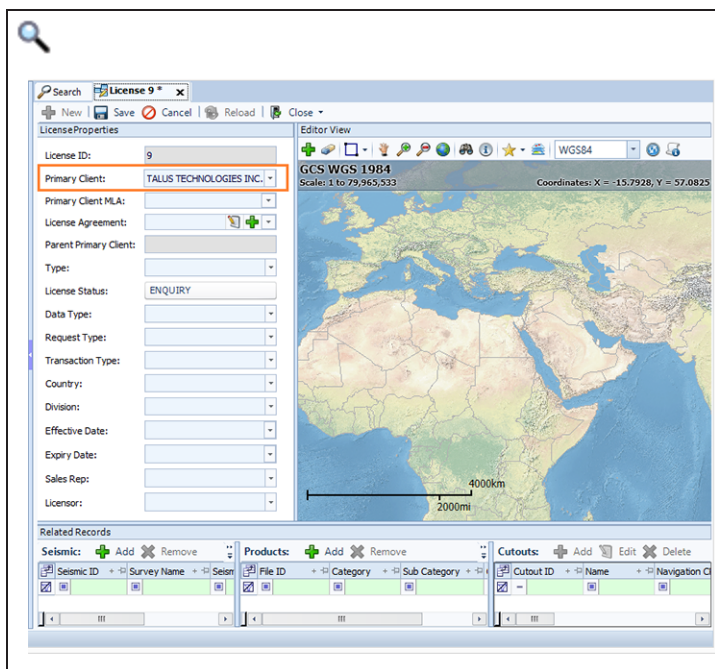


Note:

There may be a rare case when starting a new license that all the fields are not available. If this is the case, check the Map panel to make sure that the correct map format appears in the drop-down window. If it isn't the correct format, use the drop-down to change the map to the correct one.

Exploration Archives auto-populates a **License ID** and the **License Status** sets to *Enquiry*.

3. In the **License Properties** area, locate the **Primary Client** field (required) and select the primary client for the license.



4. In the **Primary Client MLA** field, select the current master license agreement. The options available for this field populate according to the selection you made for the **Primary Client** field.
5. Select the information for the remaining fields in the **License Properties** area, as appropriate. Since the *Enquiry* status is an in-progress status, you can return to the license later to add information as you receive it.
6. Click **Save** and proceed to "Add a survey or product" on page 13.

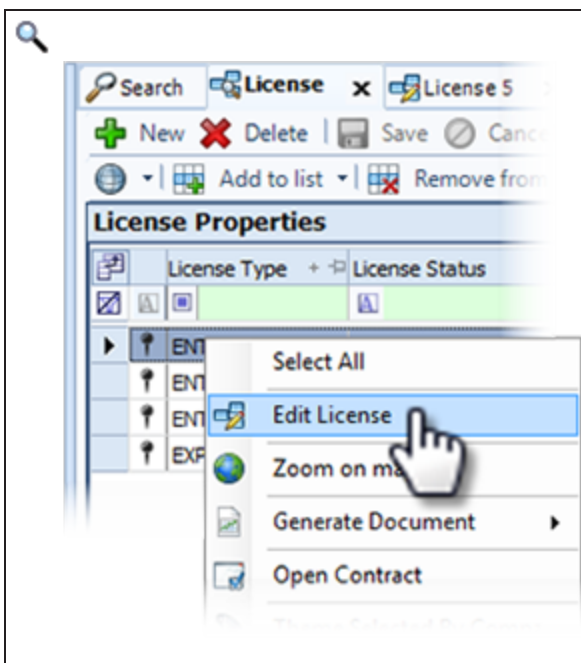
To edit an existing license:



Note:

The information in the **License Properties** grid is read only. To edit the detail, you must open the **Editor View**.

To open the **Editor View**, right-click on the license to open the context menu and click **Edit License**. The **Editor View** opens in a new tab with the details of the license available for editing.



The **License** module maintains the current information for each license. Included with the **License** module is the **Editor View** for creating and editing licenses. You must open the **Editor View** to add or edit detail in the **License Properties** area, and the **Seismic** tab and **Products** tab of the **Related Records**.

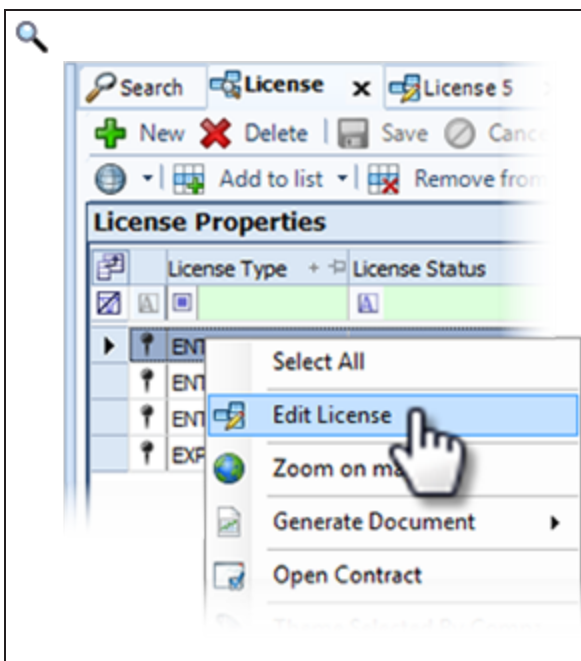
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To create a new license:

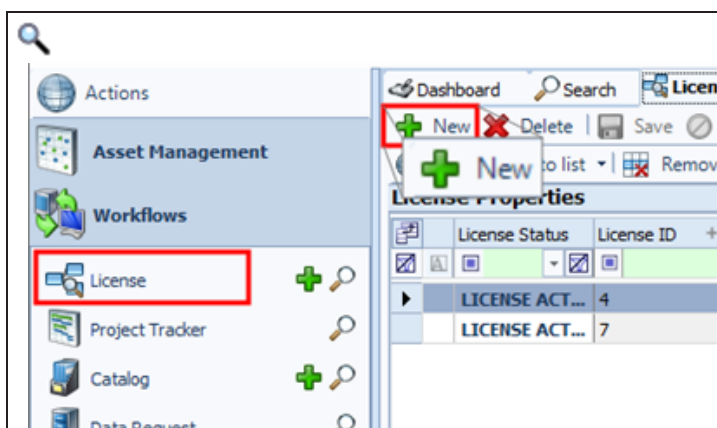
Creating a new license opens the **Editor View** with a blank record.

The tasks for creating a license involve:

- » Adding general information to the **License Properties** grid.
- » Adding seismic and associated products.
- » Creating the cutouts.

To begin a new license and add the general information:

1. Click **License** in the navigation panel to open the module.
2. Click **New** in the workspace toolbar and the **Editor View** opens in a new tab.

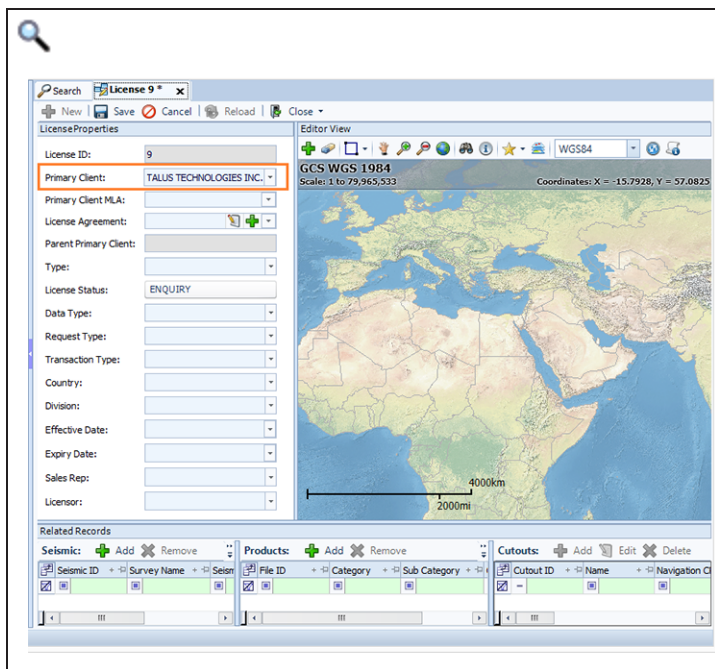


**Note:**

There may be a rare case when starting a new license that all the fields are not available. If this is the case, check the Map panel to make sure that the correct map format appears in the drop-down window. If it isn't the correct format, use the drop-down to change the map to the correct one.

Exploration Archives auto-populates a **License ID** and the **License Status** sets to *Enquiry*.

3. In the **License Properties** area, locate the **Primary Client** field (required) and select the primary client for the license.



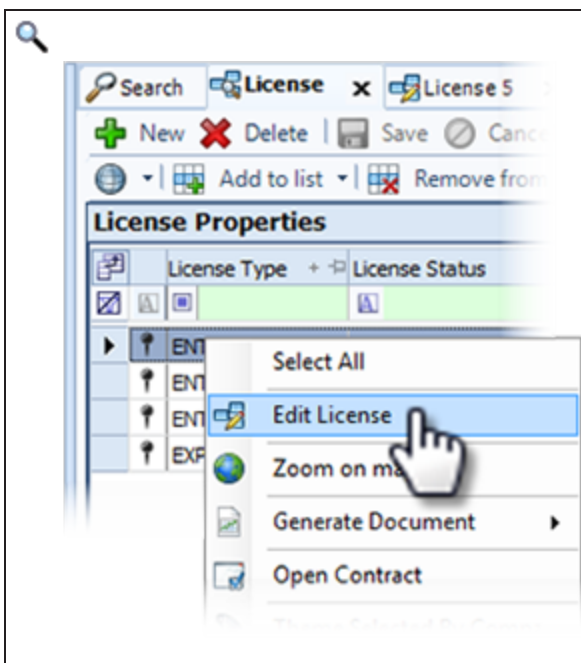
4. In the **Primary Client MLA** field, select the current master license agreement. The options available for this field populate according to the selection you made for the **Primary Client** field.
5. Select the information for the remaining fields in the **License Properties** area, as appropriate. Since the *Enquiry* status is an in-progress status, you can return to the license later to add information as you receive it.
6. Click **Save** and proceed to "Add a survey or product" below.

4.1 Add a survey or product

Exploration Archives uses the coverage defined in a cutout to calculate the fees and generate license documentation. The cutout tool provides a variety of features for making selections on a map and creating the cutout.

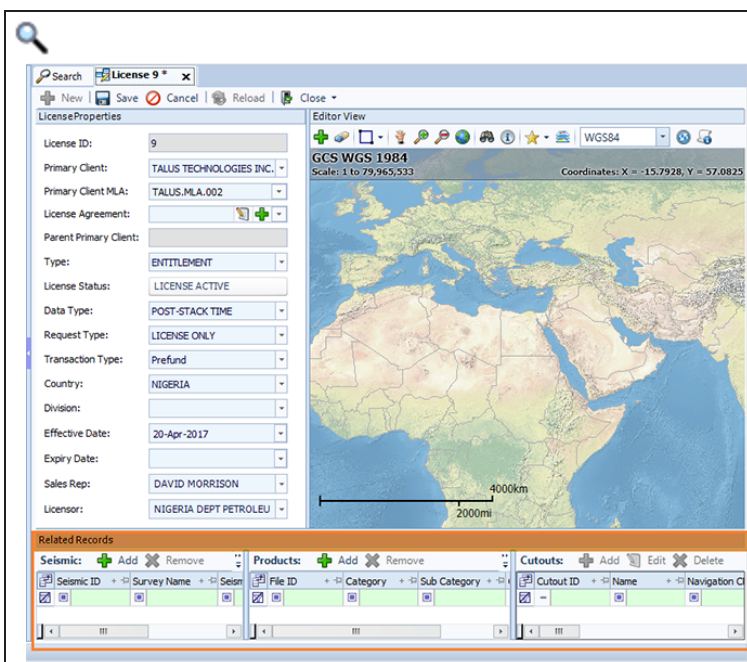
To prepare for creating a cutout, you must first add the seismic survey and/or the product files that the cutout will be derived from. The functionality for adding surveys and products is available in the **Editor View**. Opening the **Editor View** is part of the steps in creating a new license (refer to [Creating a license](#)). Alternatively, you can open the **Editor View** from an existing license.

To open the Editor View from an existing license:



Locate the license in the **License Properties** grid of the License module. Right-click on the license to populate the context menu and click **Edit License**. The **Editor View** opens in a new tab and displays the license detail.

From the **Editor View**, the lower panel displays the **Related Records** information and allows you to add **Seismic**, the associated **Products** and the **Cutouts**.



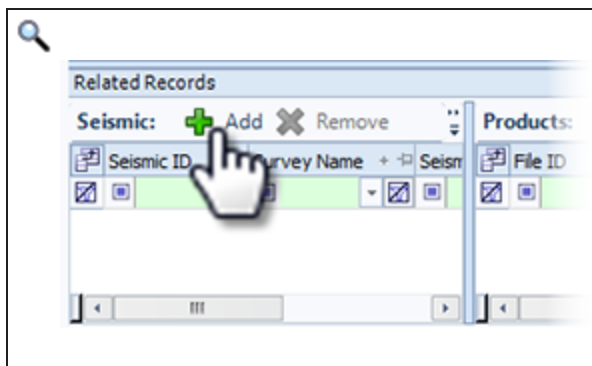
From the **Editor View** you can add a full survey or select particular products within a survey.

**Note:**

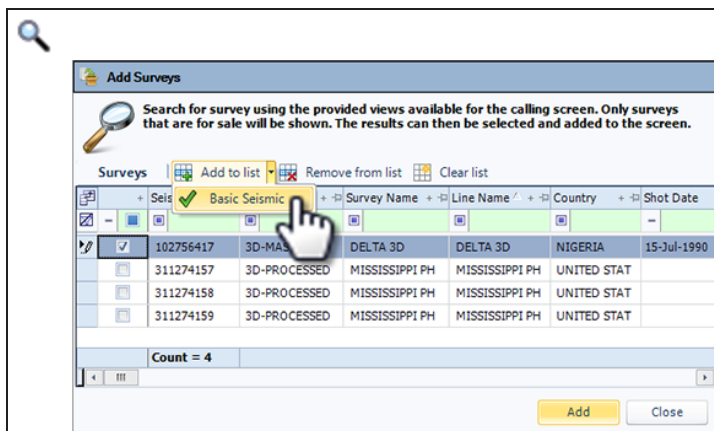
There may be a rare case when starting a new license that all the fields are not available. If this is the case, check the Map panel to make sure that the correct map format appears in the drop-down window. If it isn't the correct format, use the drop-down to change the map to the correct one.

To add a survey:

1. Click **Add** in the **Seismic** grid. The **Add Surveys** window opens as a working grid to search for the survey(s), and add to the license.



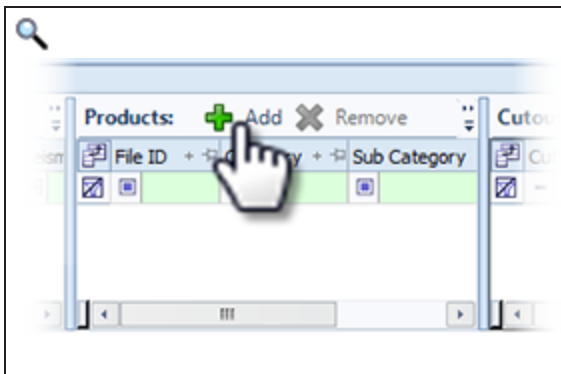
2. Click **Add to list** and select a search.



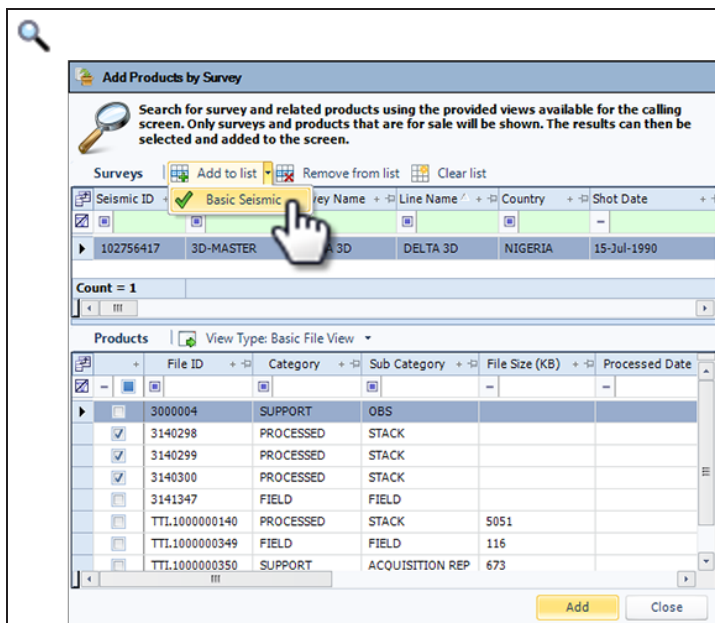
3. Enter your search criteria then click **Search**. The results populate in the **Surveys** grid and displays the surveys available for sale.
4. Select the checkboxes for the survey(s) you want to add to the license and click **Add**. The selected survey(s) add to the **Related Records** area of the license.
5. Repeat these steps to add another survey, or click **Close** if you are done.

To add products:

1. Click **Add** in the **Products** grid. The **Add Products by Survey** window opens as a working grid to search for the survey(s) and generate a list of associated products.



2. Click **Add to list** and select a search.

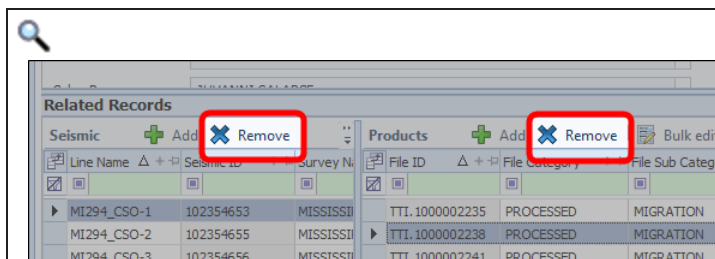


3. In the search window, enter your search criteria and click **Search**. The results populate in the **Surveys** grid with the associated products available for sale in the **Products** grid.
4. Select the check boxes for the product(s) you want to add to the license and click **Add**. The selected product(s) and associated survey adds to the **Related Records** area of the license.
5. Repeat these steps to add another product, or click **Close** if you are done.

4.2 Remove a survey or product

To remove a survey or product from a license:

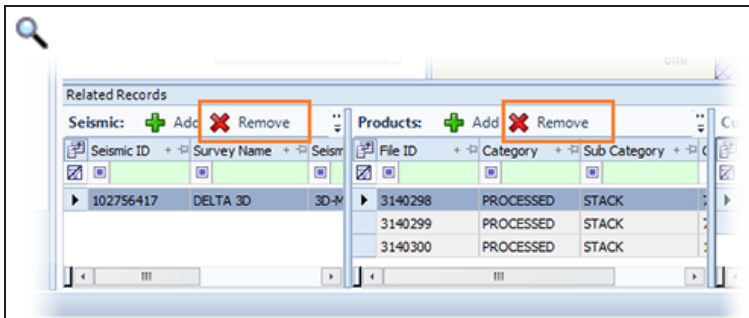
1. Open the License module and locate the license in the **License Properties** grid.
2. Right-click on the license to open the context menu and select **Edit License** to open the **Editor View**.
3. In the **Related Records** area, select the item to remove in the **Seismic** or **Products** grid and click

Remove.**Note:**

Removing a seismic survey removes all products associated to that survey. Removing a product just removes the single product.

To remove a survey or product from a license, open the License module and locate the license in the **License Properties** grid. Right-click on the license to open the context menu and select **Edit License** to open the **Editor View**.

In the **Related Records** area, select the item to remove in the **Seismic** or **Products** grid and click **Remove**.

**Note:**

Removing a seismic survey removes all products associated to that survey. Removing a product just removes the single product.

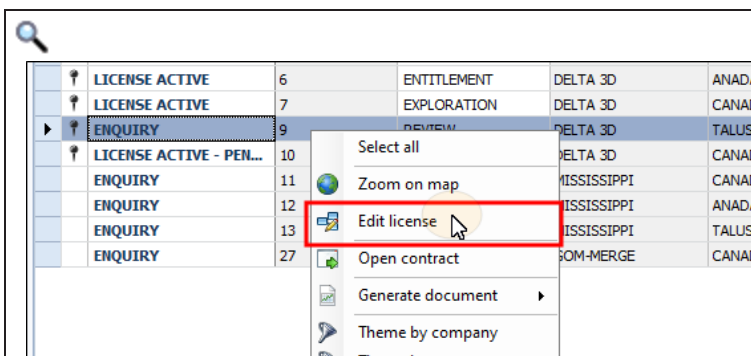
4.3 Add a cutout

The area defined by a cutout is the basis for calculating license fees and generating license documentation. The cutout is derived from a survey or from a product, depending on the client request.

To add a cutout, you must first add a survey or product (refer to "Add a survey or product" on page 13).

The functionality for adding a cutout is available in the **Editor View** of a license. Opening the **Editor View** is part of the steps in creating a new license (refer to [Creating a license](#)). Alternatively, can open the **Editor View** from an existing license.

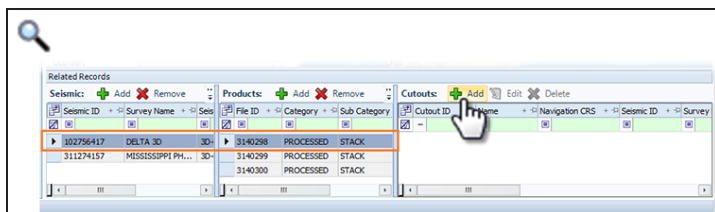
To open the Editor View from an existing license:



Locate the license in the **License Properties** grid of the License module. Right-click on the license to populate the context menu and click **Edit License**. The **Editor View** opens in a new tab and displays the license detail.

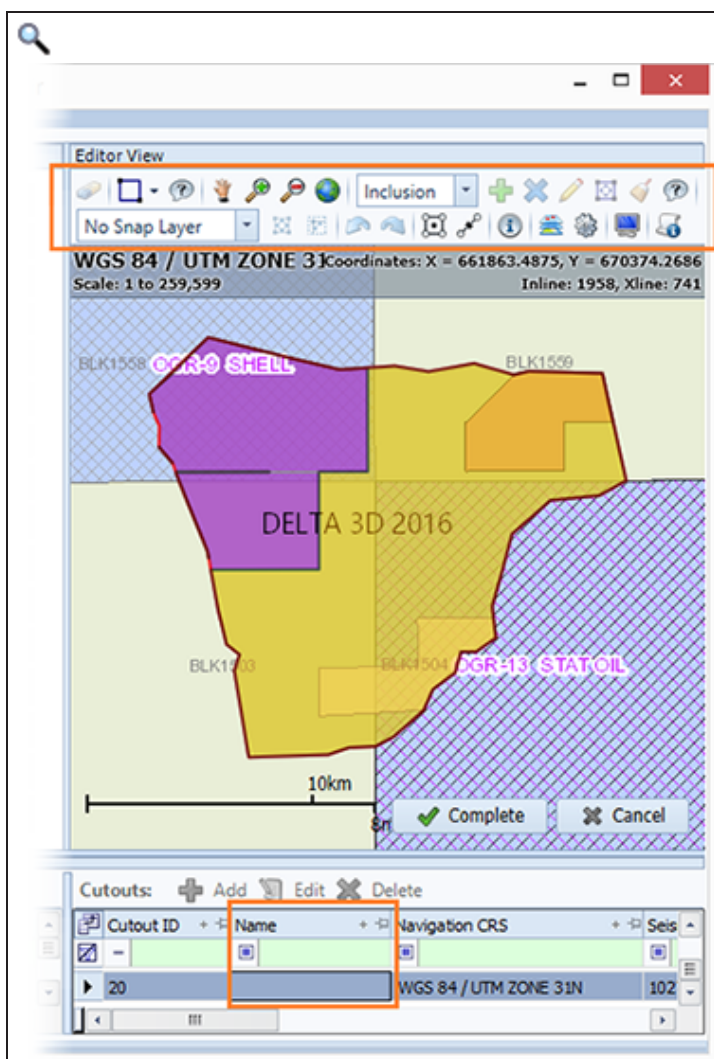
To add a cutout:

1. From the **Editor View**, select the originating seismic or product in the **Related Records**.
2. In the **Cutout** panel, click **Add**.



A new row with an auto-generated **Cutout ID** adds to the **Cutout** panel as a placeholder for the cutout. The map view zooms to the associated survey, and the toolbar changes to include a variety of cutout tools.

3. Add a name to the **Name** column.

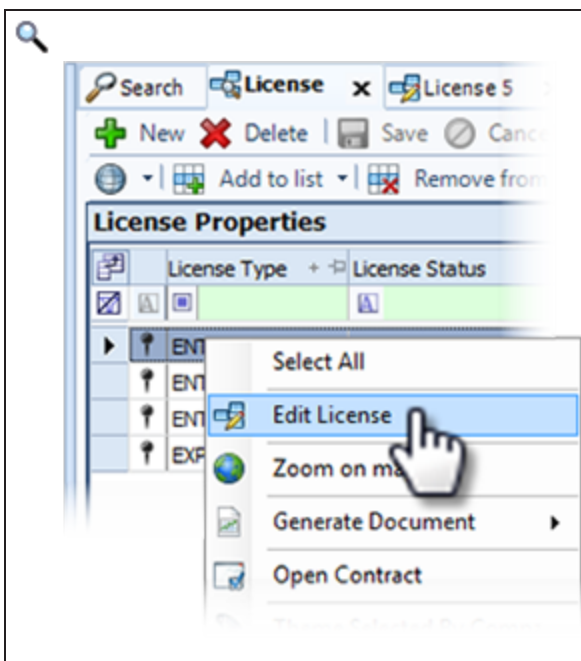


4. Use the cutout editor to create the cutout (refer to "Using the cutout editor" on page 23).
5. When done, Click **Complete**.

The area defined by a cutout is the basis for calculating license fees and generating license documentation. The cutout is derived from a survey or from a product, depending on the client request. To add a cutout, you must first add a survey or product (refer to "Add a survey or product" on page 13).

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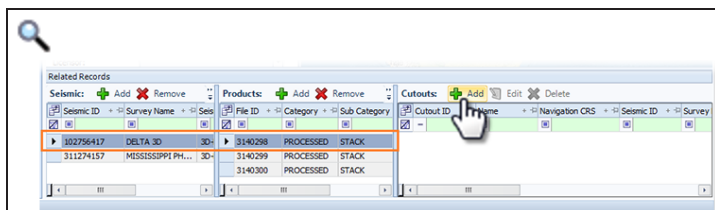
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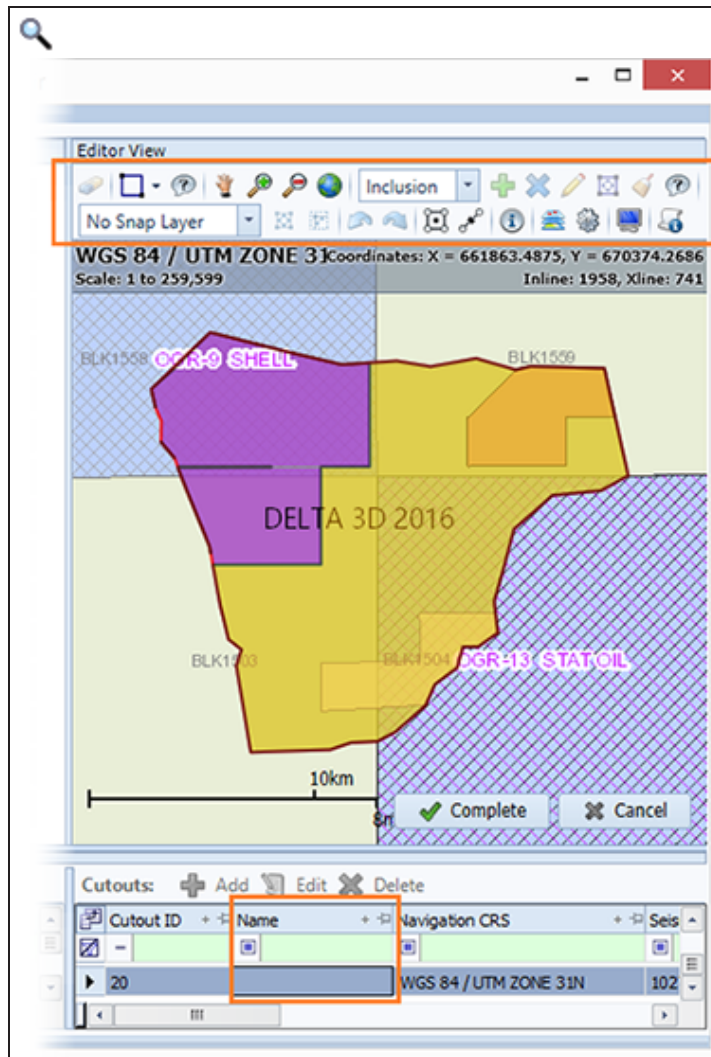
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3. Add a name to the **Name** column.



4. Use the cutout editor to create the cutout (refer to "Using the cutout editor" on page 23).
5. When done, Click **Complete**.

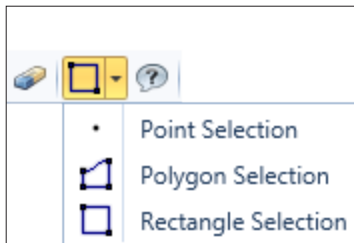
5.0 Creating a cutout

Creating a cutout for a license involves [Using the cutout editor](#) from the **Editor View** of the License module. The cutout editor provides a working platform for creating and modifying a cutout.

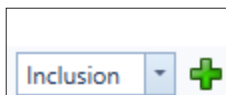
The features available in the cutout editor provide a multitude of options for completing the task of creating a cutout. For a full description of the features refer [Understanding the toolbar](#).

Here is a generic overview of a typical workflow for creating a cutout:

1. Use the selection tools to select features from the survey. The selection you create is a draft for the cutout. After adding the selection as a cutout, you can modify further.



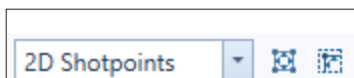
2. To add a selection as part of the cutout, decide what type of cutout you are adding; **Inclusion** or **Exclusion**. Select the type and then click **Add**.



3. Modify the cutout using the various cutout editing tools. This includes creating more selections to **Add** or **Remove** from the cutout.



4. Use the snapping tools to help set the cutout.



5. Open the **Cutout Details** to review the information and edit as needed. Alternatively, you can features in the **Cutout Details** window to import the points or segments instead of drawing the cutout.

Cutout Details

Search

Shape

Total Points	246
Total Area	46.0958
Area UOM	SQUARE KILOMETERS

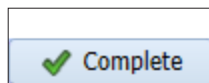
Points | Blocks | Segments

+ Add - Remove

Shapefile Import Export

Position	X	Y	Inline	Xline	Segment
4	672346.578671753	660604.967204092	1649	1218	3
3	672346.578671753	662413.911058919	1719	1202	3
2	669860.584627207	662413.911058919	1702	1106	3
1	669860.584627207	660604.967204092	1631	1116	3

6. When the details for your cutout are correct, click **Complete** in the lower right corner of the map and the information adds to the **Cutouts** grid.

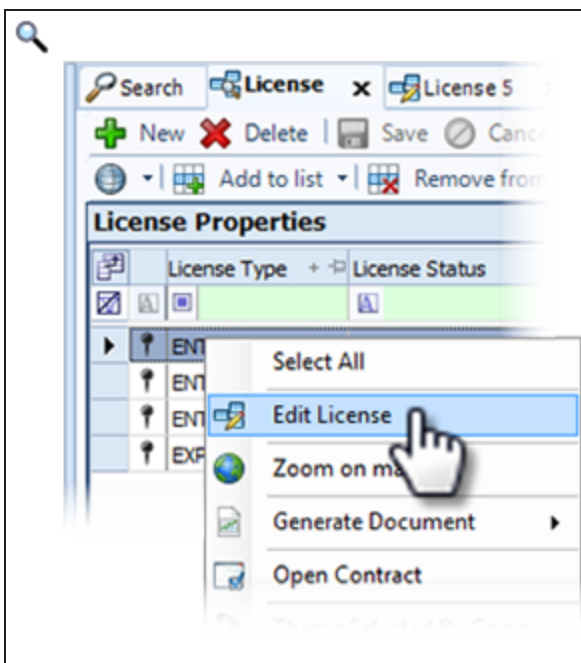


5.1 Using the cutout editor

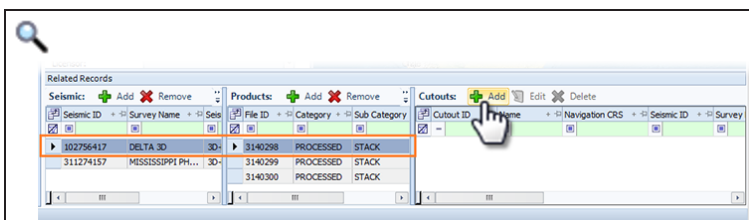
The cutout editor is available from the **Editor View** of a license. Opening the **Editor View** is part of the steps in creating a new license (refer to [Creating a license](#)). Alternatively, you can open the **Editor View** from an existing license.

To open the Editor View from an existing license...

Locate the license in the **License Properties** grid of the License module. Right-click on the license to populate the context menu and click **Edit License**. The **Editor View** opens in a new tab and displays the license detail.

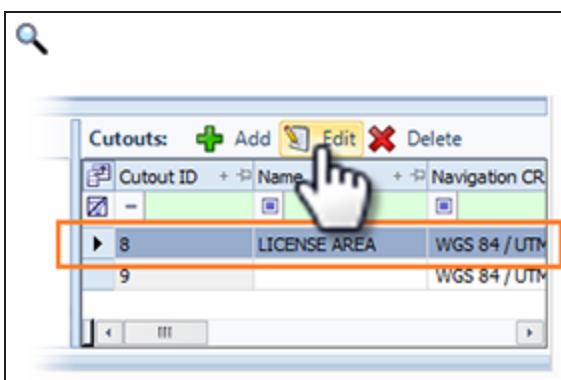


From the **Editor View**, select the originating seismic or product in the **Related Records** and click **Add** in the **Cutout** panel.

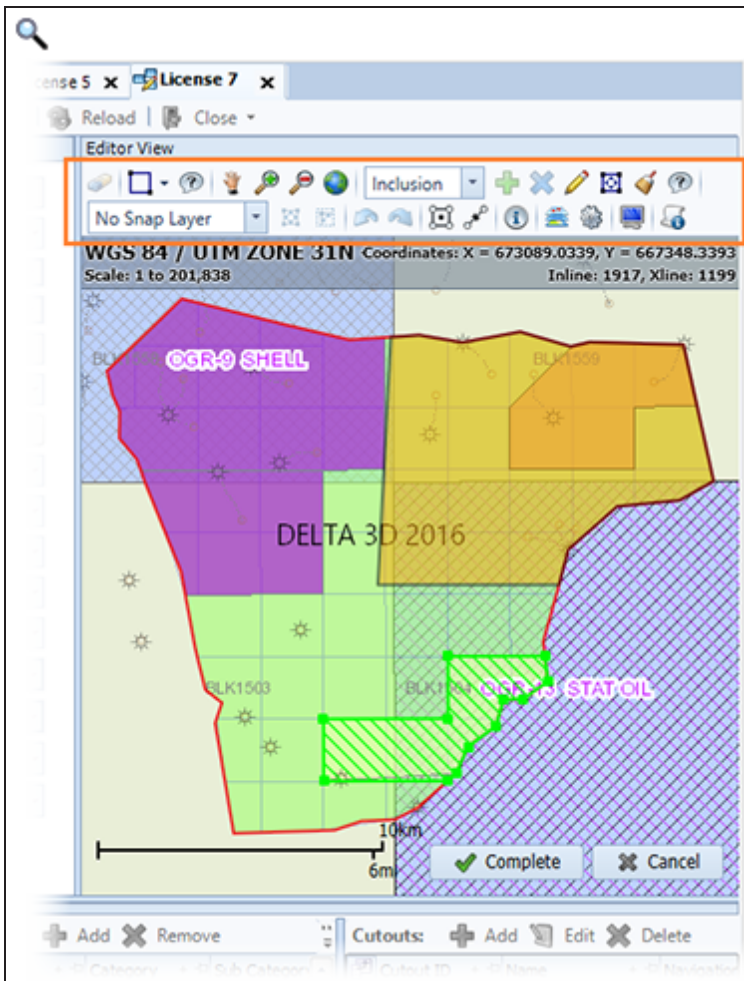


To edit an existing cutout, select the cutout in the **Cutouts** panel and click **Edit**.

To delete a cutout, select the cutout in the **Cutouts** panel and click **Delete**.



Whether adding a new cutout or editing an existing cutout, the cutout editor opens with a new set of tools in the map toolbar specific for cutouts. The map automatically zooms to the associated survey. For an existing cutout that you are editing, the survey displays with the cutout in a selected mode. In this screenshot, the cutout selected for editing displays with a green border.

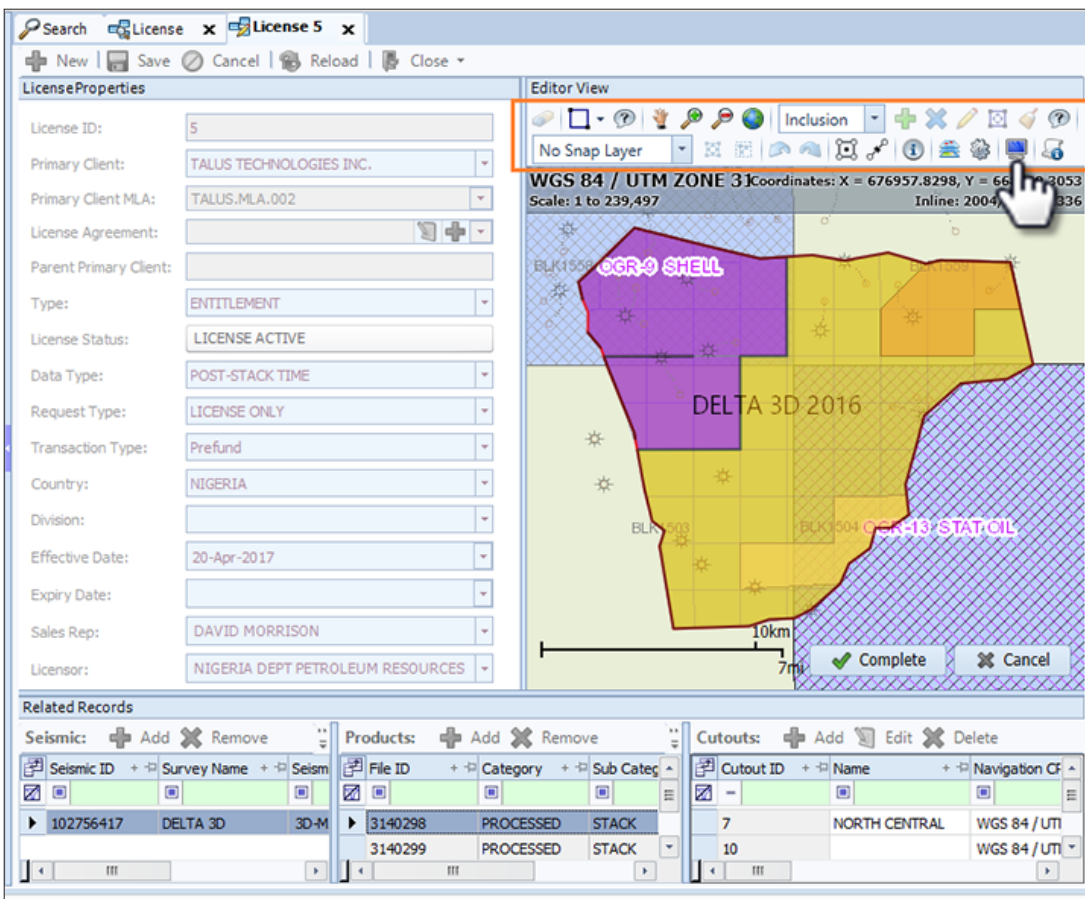


5.2 Choosing a view

The cutout editor offers two views for working on a cutout: the default view and the fullscreen view.

Editor View as default

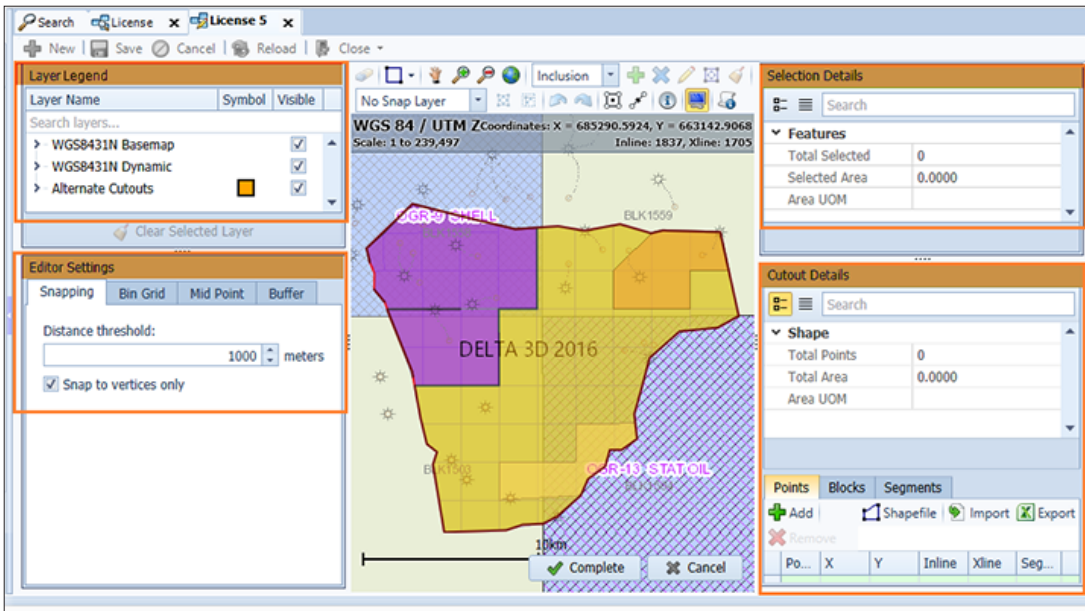
The default view maintains the layout of the **Editor View** with the **License Properties** area, the **Related Records** area and the map panel. The default view opens with the map zoomed to the selected survey and new items in the toolbar for working with cutouts.



Fullscreen view

The fullscreen view offers a workspace specifically designed for working with cutouts. The fullscreen view opens with specific toolbar items open by default. To open the fullscreen view, click fullscreen in the map toolbar. The fullscreen view opens with the map in the centre panel with two cutout tools docked on each side; **Layer Legend**, **Editor Settings**, **Selection Details** and **Cutout Details**.





The same cutout-detail panes docked in fullscreen are accessible from the toolbar in the default view. In the default view, the panes open as floating windows over the map.

Access the panes in the default view using these toolbar items:



Layer Legend: Opens the **Layer Legend** with ability to modify.



Editor Settings: Open to specify the settings for snapping, bin grids, mid point and buffers.



Selection Details: View details of the selection features.



Cutout Details: View details of the cutout including point, block and segment detail.

5.3 Understanding the cutout toolbar

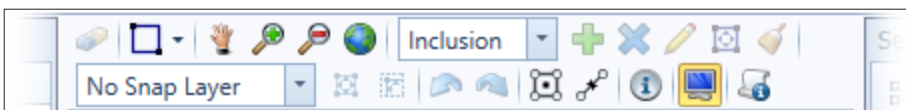
After opening the **Editor View** for a cutout ("Using the cutout editor" on page 23), the map automatically zooms to the associated survey. For editing an existing cutout or adding a new one, the **Cutout Editor** displays a set of tools in the map toolbar specific for cutouts.

If you click fullscreen  in the map toolbar, the fullscreen view opens with specific toolbar items opened by default; **Layer Legend**, **Editor Settings**, **Selection Details** and **Cutout Details**. The fullscreen view omits those items from the toolbar, while the default view displays the items in the toolbar for you to open individually.

Toolbar in default view:



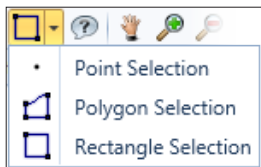
Toolbar in fullscreen view:



Cutout tools and functionality:



» **Fullscreen:** Click to open the **Fullscreen** view. The fullscreen view offers a workspace specifically designed for working with cutouts. The fullscreen view opens with the map in the centre panel with two cutout tools docked on each side; **Layer Legend**, **Editor Settings**, **Selection Details** and **Cutout Details**.



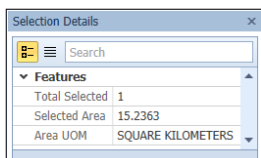
» **Selection:** Selects an area, or points, from the survey displayed on the map. Use this tool to create the base of your cutout. The selection you create is a draft for the cutout. To create the selection as part of your cutout, you must add  the selection to the cutout.



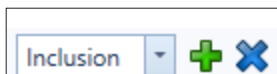
» **Midpoints:** Click to display the midpoints on your selection.



» **Selection Details:** Click to open the **Selection Details** window.



» **Erase Selection:** Erases the selection(s) that you created.



» **Add or Remove:** Adds the selection to make it part of the cutout or removes the selection from the cutout. To add the selection, decide what type of cutout you are adding;

Inclusion or **Exclusion**. Select the type and click **Add** .

To use the selection to remove features from a cutout, select the type of cutout you are removing from (**Inclusion** or **Exclusion**) and click

Remove .

You can use this feature repeatedly to continue adding to and removing from the cutout.



» **Manual edit:** Select the tool and your cursor changes to **Manual Edit**



. With this cursor, click and drag points to modify the cutout.



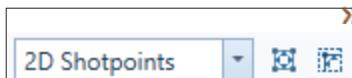
» **Clear cutout:** Clears the entire cutout type. Select the cutout type and then click **Clear cutout**.



» **Undo and Redo:** Click to undo or redo your last edit to a cutout.



» **Cutout Details:** Opens the **Cutout Details** window.



» **Snap to:** Use snapping to help set your cutout. Select the snapping layer from the drop down. Then select one of the snapping tools:



Snaps all cutout points to the points of the selected layer.



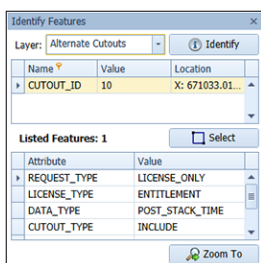
Snaps selected cutout points to the points of the selected layer.

» **Bin grids:** Click to display the bin grids for the survey. Zoom in on the map to view more bin grid detail.

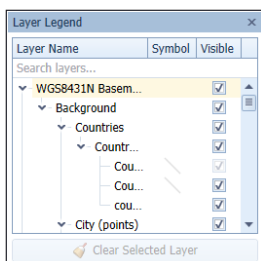
» **Editor Settings:** Click to open the **Editor Settings** window.



» **Identify:** Identify the features of particular items on the map. Click to activate the **Identify** cursor . Click and drag to select features to identify. The **Identify Features** window opens with more options.



» **Layers:** Click to open the layers legend. In the layers legend, select and deselect the checkboxes to display different map layers.



» **Pan:** Click and drag to pan the map. Double-click to zoom in slightly.



» **Zoom in:** Draw an area on the map to zoom the view to the specified extent.



» **Zoom out:** Draw an area to quickly zoom out.



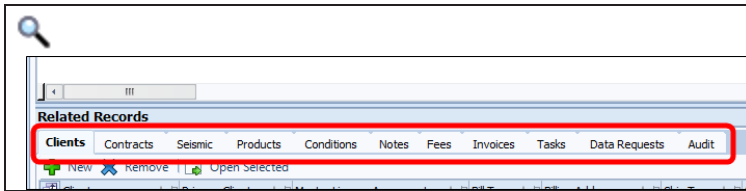
» **Full map:** Click to expand the view to the full extent of the map.



» **Troubleshooting log:** Click to display the technical actions of Exploration Archives. This is useful for your administrator when resolving issues.

6.0 Manage Related Records

Information associated to a license selected in the **License Properties** grid displays in the **Related Records** panel.



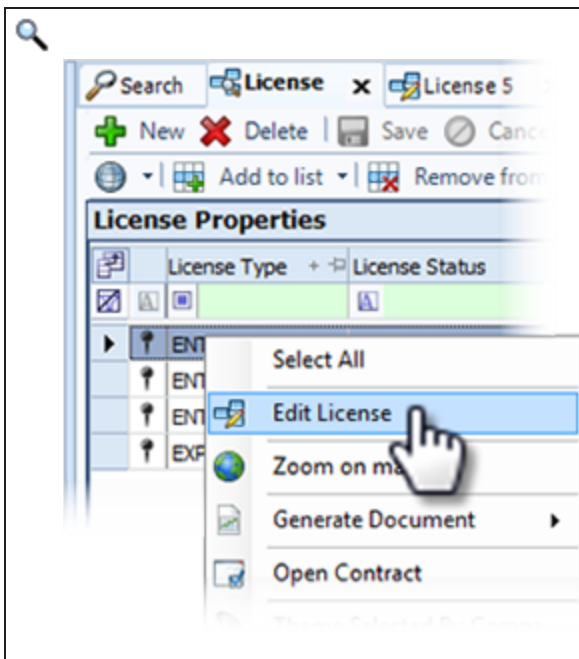
The detail in the **Related Records** tabs is available for editing directly in each tab, with the exception of **Data Request**, **Seismic** and **Products**.

To edit the **Data Request** detail, refer to Requesting Data.

To add or edit detail in the **Seismic** and **Products** tabs, you must first open the **Editor View**.

To open **Editor View**...

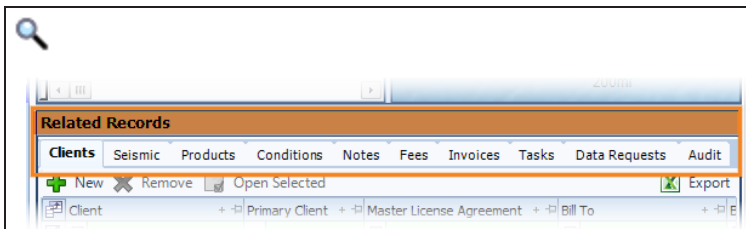
To open the **Editor View**, right-click on the license to open the context menu and click **Edit License**. The **Editor View** opens in a new tab with the **Seismic** and **Products** (and **Cutouts**) detail available for editing. For further detail, refer to "Add a survey or product" on page 13 and "Add a cutout" on page 17.



The tabs that allow direct editing include:

- » [Clients](#)
- » [Conditions](#)
- » [Notes](#)
- » [Fees](#)
- » [Invoices](#)
- » [Tasks](#)

Information associated to a license selected in the **License Properties** grid displays in the **Related Records** panel.



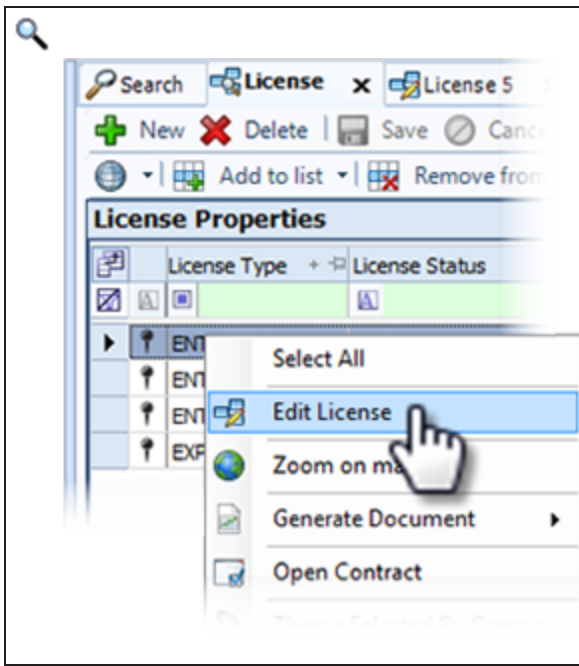
The detail in the **Related Records** tabs is available for editing directly in each tab, with the exception of **Data Request**, **Seismic** and **Products**.

To edit the **Data Request** detail, refer to Requesting Data.

To add or edit detail in the **Seismic** and **Products** tabs, you must first open the **Editor View**.

To open **Editor View**...

To open the **Editor View**, right-click on the license to open the context menu and click **Edit License**. The **Editor View** opens in a new tab with the **Seismic** and **Products** (and **Cutouts**) detail available for editing. For further detail, refer to "Add a survey or product" on page 13 and "Add a cutout" on page 17.



The tabs that allow direct editing include:

- » [Clients](#)
- » [Conditions](#)
- » [Notes](#)
- » [Fees](#)
- » [Invoices](#)
- » [Tasks](#)

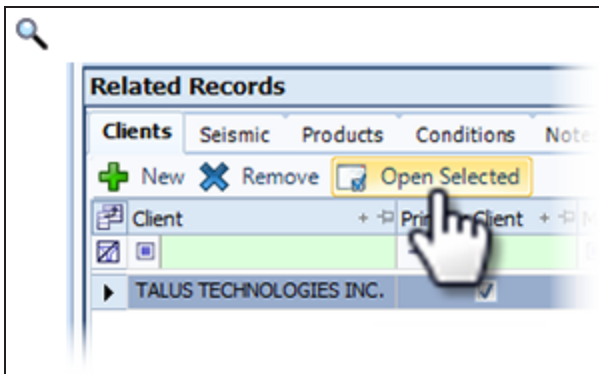
6.1 Assign clients to a license

The **Clients** tab of the **Related Records** is directly linked to the records in the **Business Associate** module.

When assigning a Client, the general information automatically generates from the existing business associate (BA) detail.

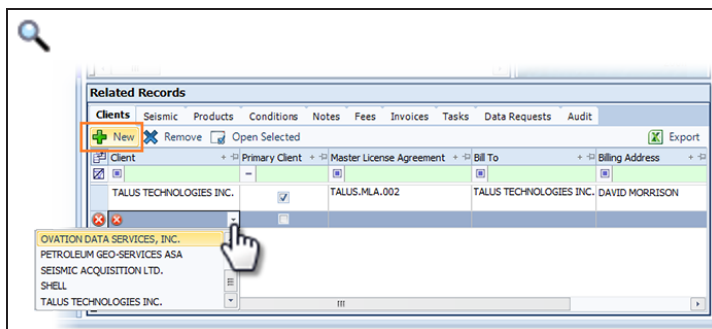
To edit an existing business associate record...

Select the Client in the grid and click **Open Selected**. The business associate record opens in the **Business Associate** module. Edit as required and save.



To assign a Client:

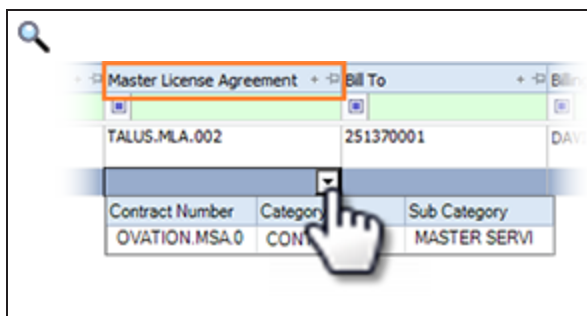
1. Open the **Clients** tab and click **New**. A new row adds to the grid.
2. In the **Client** column, click the down arrow to open the list of existing Client records. Locate the target Client and select. The Client name adds to the grid. The options available to select for the other columns become available according to the existing record.



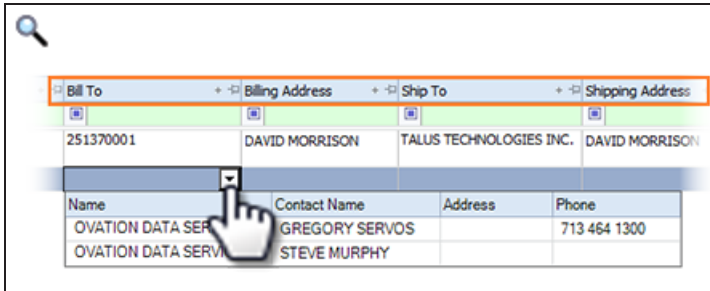
Note:

If you are adding one Client, select the checkbox in the **Primary Client** column. If you are adding more than one Client, select one of the clients as the **Primary Client**.

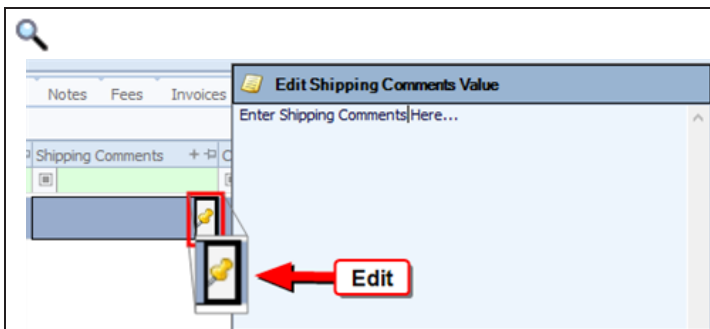
3. In the **Master License Agreement** column, click the down arrow and select the relevant agreement.



1. For the billing and shipping information, click the down arrow and select the correct information from the list.



2. To add additional shipping information, hover over the **Shipping Comments** cell and click the **Edit** icon to open the text entry window.



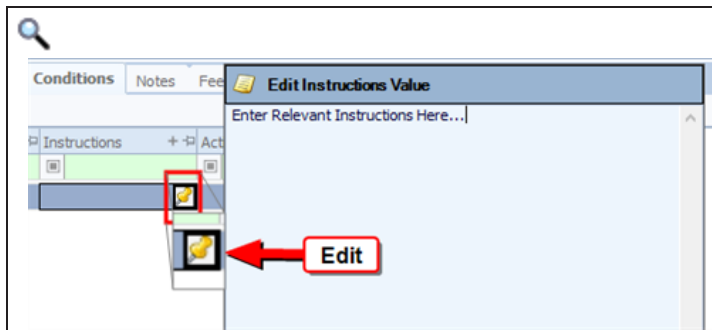
3. Enter the relevant information and click **OK**.
4. Double-click on each of the remaining cells to activate, and enter the contact information, AFE, PO number and references number, as required.
5. When complete, click **Save** in the main toolbar.

6.2 Use conditions

The **Conditions** tab is for recording a condition that is associated to a license. Exploration Archives automatically generates a notification reminder to the assignee according to the **Action Date** and **Expiry Date** associated to the condition.

To add a condition:

1. Open the **Conditions** tab and click **New**. A new row adds to the grid.
2. Select the **Condition Type**.
3. Select the **Condition Status**.
4. To enter the instructions, hover over the **Instructions** cell and click edit to open the text edit window.



Enter the instructions and click **OK**.

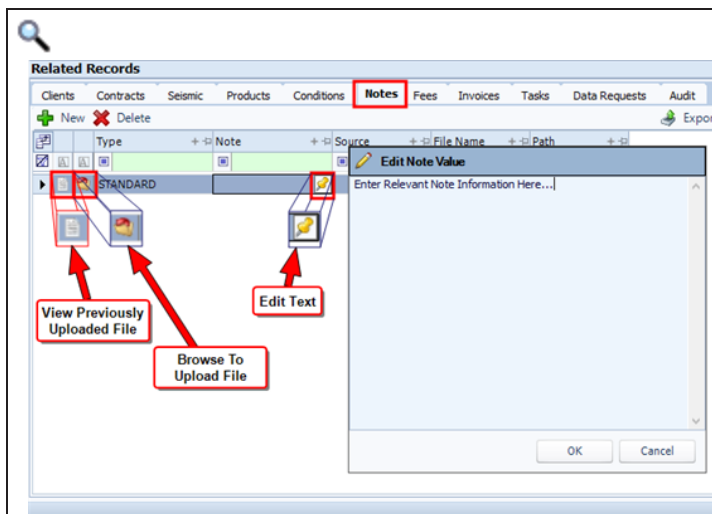
5. Enter the **Action Date** and the **Expiry Date**.
6. Select the responsible person in the **Assigned To** column.
7. Click **Save** in the main toolbar.

6.3 Add notes

The **Notes** tab is for adding files and notes to a license.

To add a file or note:

1. Open the **Notes** tab and click **New**. A new row adds to the grid.
2. The leading columns of a row provide the option to click and browse for a file to upload or view a file (if already uploaded).



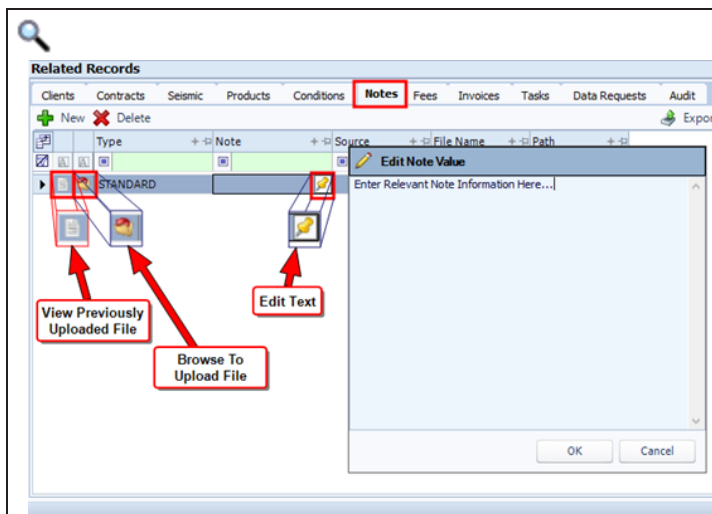
3. If you are uploading a file, click **browse** and locate the file to upload.
4. Select the file and click **Open**. The file loads to the **Notes** grid with the **File Name** and **Path** included.

5. To manually enter a comment or instructions, hover over the **Note** cell and click **Edit Text** to open the text edit window. Enter the note and click **OK**.
6. Click **Save** in the main toolbar.

The **Notes** tab is for adding files and notes to a license.

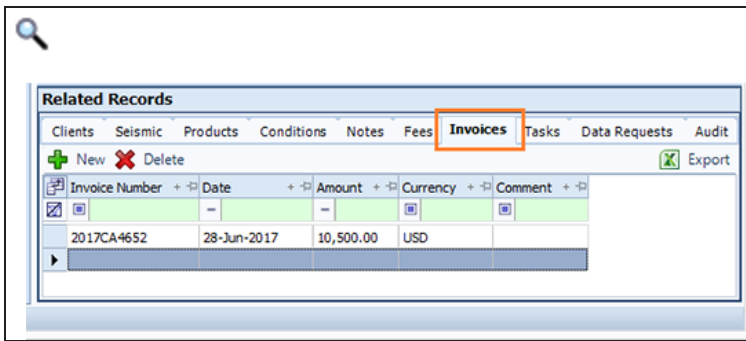
To add a file or note:

1. Open the **Notes** tab and click **New**. A new row adds to the grid.
2. The leading columns of a row provide the option to click and browse for a file to upload or view a file (if already uploaded).
3. If you are uploading a file, click **browse** and locate the file to upload.
4. Select the file and click **Open**. The file loads to the **Notes** grid with the **File Name** and **Path** included.
5. To manually enter a comment or instructions, hover over the **Note** cell and click **Edit Text** to open the text edit window. Enter the note and click **OK**.
6. Click **Save** in the main toolbar.



6.4 List invoices

The **Invoices** tab maintains the list of invoices associated to a license. This list is a reference for investigating further information.

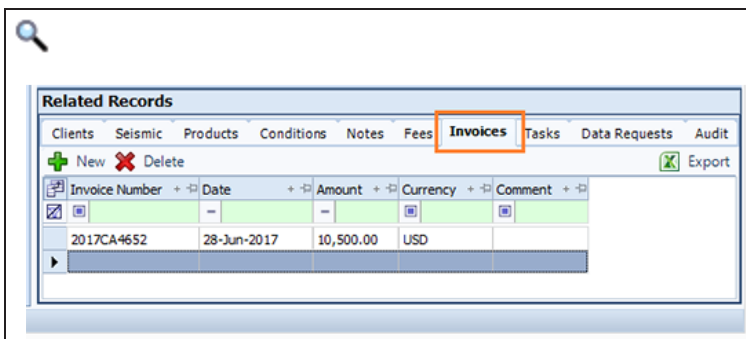


To add a reference to an invoice:

1. Open the **Invoices** tab then click **New**. An empty row adds to the grid.
2. In the **Invoice Number** column, enter the number as it appears on the invoice.
3. Enter the date of the invoice in the **Date** column.
4. Enter the total cost and currency in the **Amount** and **Currency** columns.
5. Double-click the comment cell and manually enter a comment, if applicable.
6. Click **Save** in the main toolbar.

The **Invoices** tab maintains the list of invoices associated to a license. This list is a reference for investigating further information.

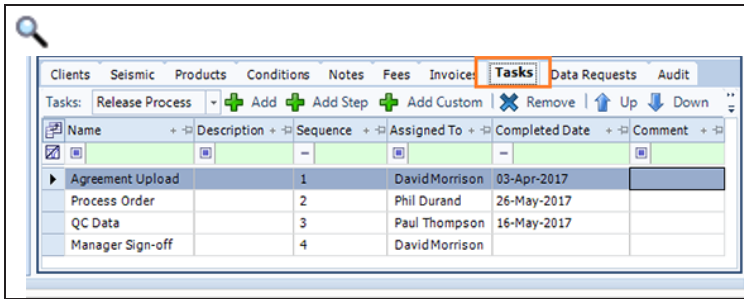
To add a reference to an invoice:



1. Open the **Invoices** tab then click **New**. A new row adds to the grid.
2. In the **Invoice Number** column, enter the number as it appears on the invoice.
3. Enter the date of the invoice in the **Date** column.
4. Enter the total cost and currency in the **Amount** and **Currency** columns.
5. Double-click the comment cell and manually enter a comment, if applicable.
6. Click **Save** in the main toolbar.

6.5 Create tasks for a license

The **Tasks** tab for the License module is in the **Related Records** area.



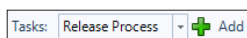
Tasks provide visibility for managing user tasks. Users with permission can create and assign tasks as required for the catalog session data request.

Tasks for a typical catalog session data request are available in the predefined task list. Adding a predefined task, generates a list of the required steps to complete the catalog session data request. Using the toolbar, add, remove and reorder the steps as needed. Use the **Add custom** option for creating a custom steps. Use the **Description** field to add details of a task. In the **Assigned To** column, assign each task to the responsible party.

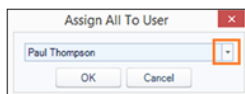
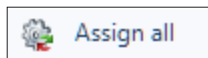
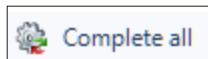
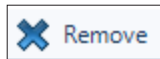
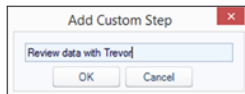
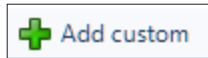
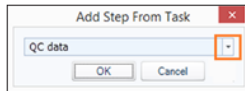
After completing a task step, the assigned user enters a date in the **Completed Date** column. To log additional information associated to a task step, the assignee can use the **Comment** column.

The **Tasks** feature automatically sends a notification to the assigned user in accordance with the system trigger. For example, the system may be configured to keep the task on hold until the catalog session data request is at a particular status. Once the first step is triggered, notifications send sequentially as each step is completed. Setting the completion date for task step triggers the notification for the next step.

Tasks toolbar functionality:



» **Add:** Adds a task that includes a sequence of predefined steps. In the **Tasks** field, click the down arrow to view the tasks options. Select a tasks and click **Add**. The set of steps required to complete the task adds to the grid.

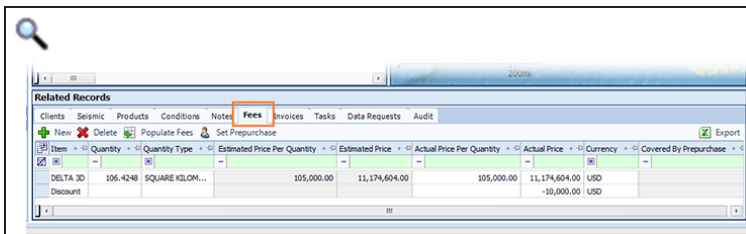


- » **Add step:** Adds an individual step from the predefined tasks. In the **Tasks** tab, from the **Tasks** field in the toolbar, select the task that has the target step. Click **Add Step** and the **Add Step From Task** window opens. Click the down arrow and select the associated step. Click **OK**. The task step adds to the grid.
- » **Add custom:** Adds a custom step. Click **Add custom** to open the **Add Custom Step** window. Click in the entry field and enter a name for the step. Click **OK**.
- » **Remove:** Removes a step from the grid. Select the step in the grid. Click **Remove**. The step instantly removes from the grid.
- » **Up and Down:** Moves the task up or down in the sequence order. Select the task and click **Up** or **Down** to move the task step to a new location in the sequence. The task moves in the grid and the number in the **Sequence** column changes accordingly.
- » **Complete all:** Adds the current date to the **Completed Date** column for all tasks. Click **Complete all** and current date instantly adds to the **Completed Date** column.
- » **Assign all:** Assigns all task steps to one individual. Click **Assign all** to open the **Assign All to User** window. Click the down arrow and select the assignee. Click **OK**. The **Assigned To** column updates for all task steps with the specified assignee name.
- » To assign individual task steps, select the assignee using the drop-down menu in the **Assigned To** column.

7.0 Manage fees

The License module uses built-in algorithms to calculate fees. The fees are based on the length, area or blocks cut from a survey for the license. The fees calculate using the price set at the seismic survey level for the particular survey.

The **Fees** tab of the **Related Records** area populates the length, area or blocks according to the cutout and the price as specified for the survey.



The **Fees** tab includes the option to cover the fees using a prepurchase amount, if the client has an existing prepurchase contract. A prepurchase contract must be registered to the client using the Business Associate module.

Features available for managing license fees:

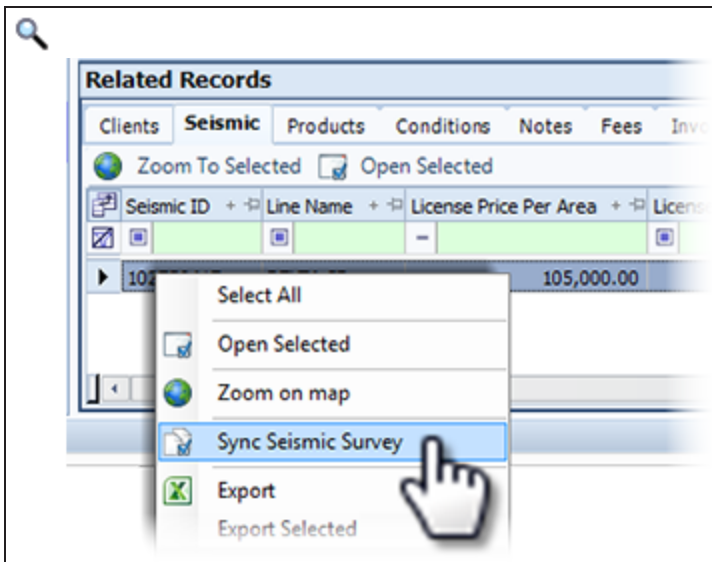
- » [Calculating fees](#)
- » [Adding a custom fee](#)
- » [Using a prepurchase](#)

7.1 Calculate fees

The Fees tab of the Related Records area provides an auto-calculation tool to populate license fees. The price used for calculating the fees must pre-set in the Seismic module. Be sure to sync the seismic survey with the license to ensure the license obtains the current pricing.

To sync the seismic survey...

In the **Related Records** area of the License module, open the **Seismic** tab. Right-click on the seismic record and select **Sync Seismic Survey**. All license-related columns for the survey update to the current information.



To populate fee, click **Populate Fees**. The values for the related columns in the **Fees** tab automatically display.

Quantity	Quantity Type	Estimated Price Per Quantity	Estimated Price	Actual Price Per Quantity	Actual Price
148.2539	SQUARE KILOMET...	105,000.00	15,566,659.50	105,000.00	15,566,659.50

The **Estimated Price Per Quantity** column populates the price as set from the Seismic module. The quantity multiplied by the price displays in the **Estimated Price** column. The estimated values replicate to populate the **Actual Price Per Quantity** and the **Actual Price**. The *actual* values are open for editing as required.

7.2 Add a custom fee

The **Fees** tab includes the option of creating a custom fee entry.

To create a custom fee:

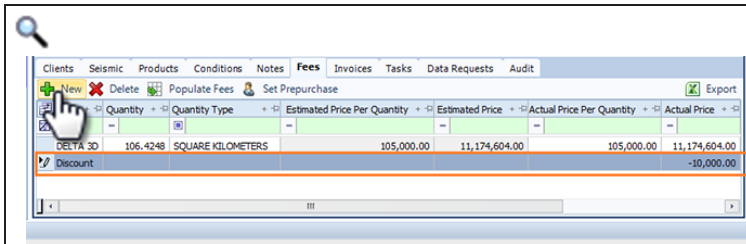
Quantity	Quantity Type	Estimated Price Per Quantity	Estimated Price	Actual Price Per Quantity	Actual Price
DELTA 3D	106.4248 SQUARE KILOMETERS	105,000.00	11,174,604.00	105,000.00	11,174,604.00
Discount					-10,000.00

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1. Click **New**. A new row with empty cells adds to the grid.
2. Double-click a cell to enter new information.
3. Click **Save** in main toolbar.

The **Fees** tab includes the option of creating a custom fee entry.

To create a custom fee:



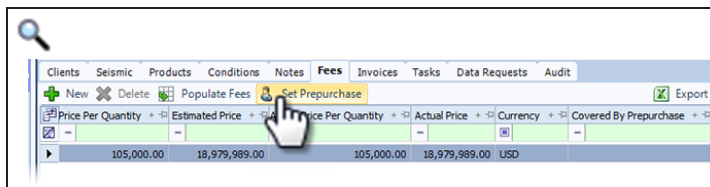
1. Click **New**. A new row with empty cells adds to the grid.
2. Double-click a cell to enter new information.
3. Click **Save** in main toolbar.

7.3 Use a prepurchase

The **Fees** tab in the License module includes the option to cover the fees using a prepurchase amount. The prepurchase contract details must be registered with the primary client in the Business Associate module.

To set the prepurchase:

1. In the **Fees** tab, select the item applicable for the prepurchase.



2. Click **Set Prepurchase**. The **Set Prepurchase** window opens.

Set prepurchase

Only prepurchases that have available credit and match the fee type are available.
Select the prepurchase to cover the selected fees.

MLA.002

— Prepurchase details —

Client: TALUS TECHNOLOGIES INC.

Quantity: 500.00

Quantity Type: SQUARE KILOMETERS

— Available —

Quantity: 500.00

— Result —

Total Fee Quantity: 94.41

Remaining Quantity: 405.59

Save Cancel

3. In the top field, click the down arrow and select the prepurchase to apply to the license. The associated information displays as a preview in the **Prepurchase Details**, **Available** and **Result** areas.
4. Click **Save**. The window closes and the calculated amount displays in the **Covered By Prepurchase** column.

The **Fees** tab in the License module includes the option to cover the fees using a prepurchase amount. The prepurchase contract details must be registered with the primary client in the Business Associate module.

To set the prepurchase:

1. In the **Fees** tab, select the item applicable for the prepurchase.

Price Per Quantity	Estimated Price	Price Per Quantity	Actual Price	Currency	Covered By Prepurchase
105,000.00	18,979,989.00	105,000.00	18,979,989.00	USD	

2. Click **Set Prepurchase**. The **Set Prepurchase** window opens.

Set prepurchase

Only prepurchases that have available credit and match the fee type are available.
Select the prepurchase to cover the selected fees.

MLA.002

– Prepurchase details –

Client: TALUS TECHNOLOGIES INC.

Quantity: 500.00

Quantity Type: SQUARE KILOMETERS

– Available –

Quantity: 500.00

– Result –

Total Fee Quantity: 94.41

Remaining Quantity: 405.59

Save Cancel

3. In the top field, click the down arrow and select the prepurchase to apply to the license. The associated information displays as a preview in the **Prepurchase Details**, **Available** and **Result** areas.
4. Click **Save**. The window closes and the calculated amount displays in the **Covered By Prepurchase** column.

7.4 Set license price



Note:

The License module includes a calculation tool that populates license fees for seismic that is for sale. The fees calculate according to the prices set for the survey in the Seismic module.

To set the license price:

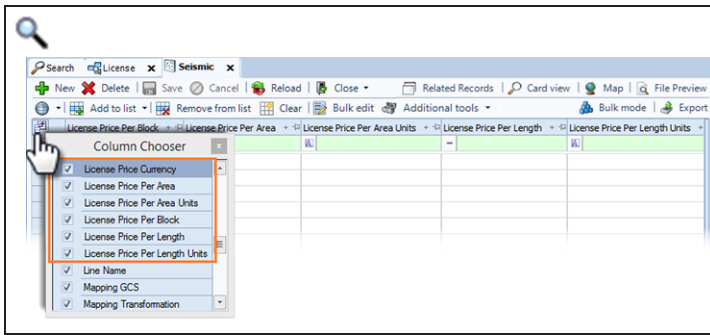
1. Select the record in the Seismic module.
2. Locate the license price columns in the main grid.



Note:

If the license price columns are not in the grid, use the **Column Chooser** to add them.

Click the column chooser icon  (upper left corner of the grid) to open the list of available columns. Drag and drop the license columns from the

Column Chooser to the grid.


3. Enter the license price details for each column, as applicable:

 **Note:** When entering values that require a decimal amount you need to type the decimal.

Licence Price Currency

This is a drop-down list where you can select the currency the License Price is in.

License Price Per Area

Double-click in this cell to enter an amount that reflects the cost of the license per area.

License Price Per Area Units

This field is a drop-down list that allows you to select the units of measurement for the License per Area.

License Price Per Block

Double-click in this cell to enter an amount for the License price per block of land.

License Price Per Length

Double-click in this cell to enter an amount for the License price per length of land.

License Price Per Length Units

This is a drop-down list that lets your select the units of measurement

4. Click **Save**.

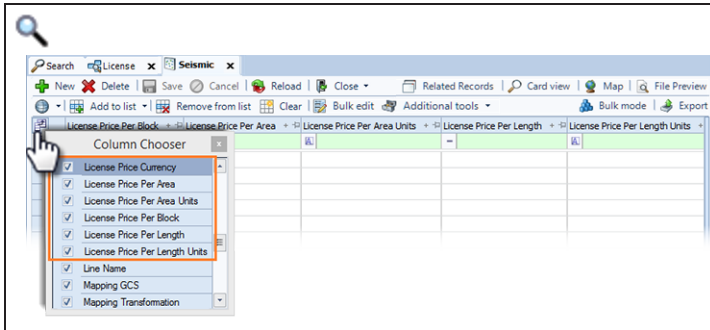
The License module includes a calculation tool that populates license fees for seismic that is for sale. The fees calculate according the prices set for the survey in the Seismic module.

To set the license price:

1. Select the record in the Seismic module.
2. Locate the license price columns in the main grid.

 **Note:** If the license price columns are not in the grid, use the **Column Chooser** to add them.
Click the column chooser icon

 (upper left corner of the grid) to open the list of available columns. Drag and drop the license columns from the **Column Chooser** to the grid.



3. Enter the license price details for each column, as applicable:

 **Note:** When entering values that require a decimal amount you need to type the decimal.

Licence Price Currency

This is a drop-down list where you can select the currency the License Price is in.

License Price Per Area

Double-click in this cell to enter an amount that reflects the cost of the license per area.

License Price Per Area Units

This field is a drop-down list that allows you to select the units of measurement for the License per Area.

License Price Per Block

Double-click in this cell to enter an amount for the License price per block of land.

License Price Per Length

Double-click in this cell to enter an amount for the License price per length of land.

License Price Per Length Units

This is a drop-down list that lets your select the units of measurement

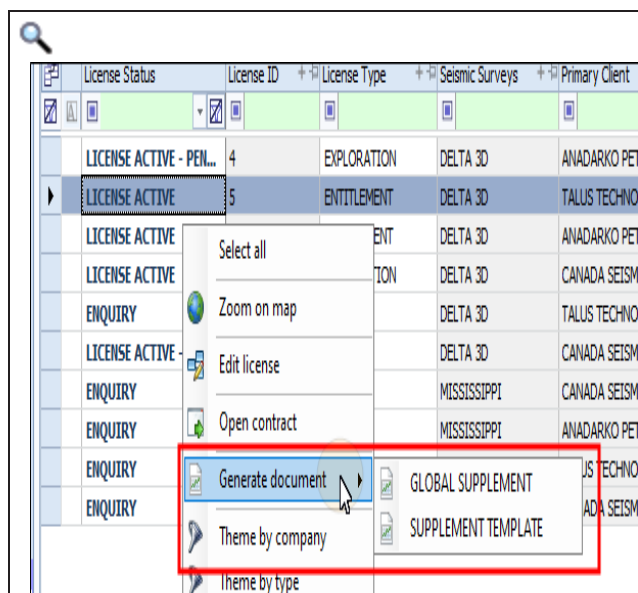
4. Click **Save**.

8.0 Generate documentation

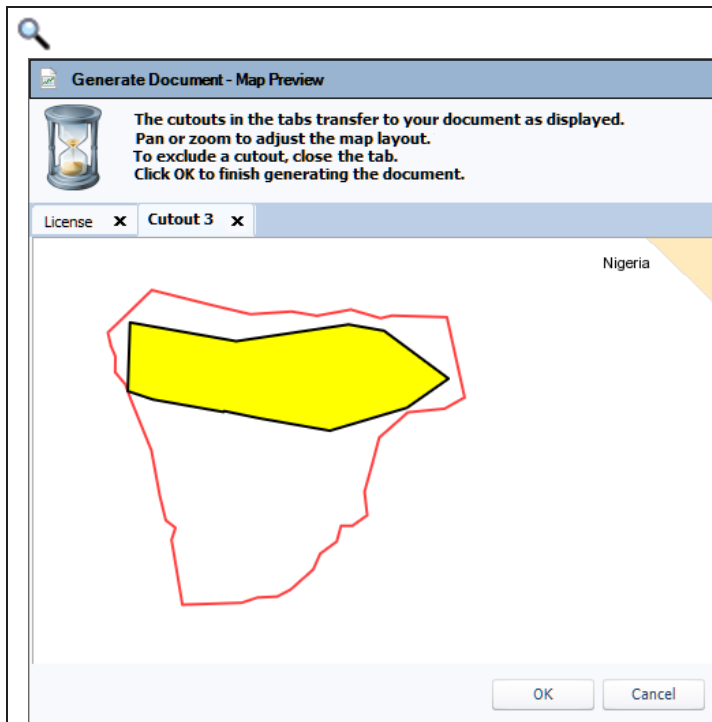
The document tool in the License module generates license-related documentation specific for your company. The templates use database tags to populate information into an editable Word document. Potential templates available may include License Contract, Data Delivery Details, Standard License Agreement, X,Y Listing, Data Request Details and any other custom configured template.

To generate a document:

1. Open the License module and locate the target license in the **License Properties** grid.
2. Right-click on the target license to open the context menu. Point to **Generate document** and then select the template to use to generate the document.



A preview of the associated map images open in a new window.



3. In the preview window, the license and cutouts display in the tabs. Click each tab to view the images. Pan or zoom to edit the display of the image as appropriate. To omit an image from the document, click the X to close the tab.
4. To generate the document, click **OK**. Microsoft Word opens with the license and cutout images and any other database tags as specified for the template. Edit as required.

The document tool in the License module generates license-related documentation specific for your company. The templates use database tags to populate information into an editable Word document. Potential templates available may include License Contract, Data Delivery Details, Standard License Agreement, X,Y Listing, Data Request Details and any other custom configured template.

To generate a document:

1. Open the License module and locate the target license in the **License Properties** grid.
2. Right-click on the target license to open the context menu. Point to **Generate document** and select the template to use to generate the document.





