



MAXsys ClubGRANTS User Guide

Version 1.11



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1 Introduction

The Regulator’s assessment of a club’s annual return of ClubGRANTS expenditure is to determine if the claim is eligible for a tax rebate. If a club submits expenditure that clearly does not meet the guidelines, it will be assessed and rejected. While “Application” may be used throughout this guide and MAXsys application, the Regulator notes the annual ClubGRANTS submission process is a revenue assurance review of tax rebate compliance not an application for approval of the payments to the specified entities. Clubs may still be subject to targeted compliance audit activity.

2 Before you Start

2.1 Open your browser

The ClubGRANTS application is accessible through most popular web browsers, including Chrome, Safari and Firefox. Once you have launched your browser, navigate to MAXsys.com.au to launch MAXsys.

2.2 Log onto the MAXsys Application



1. Type in your *Email* and *Password*
2. Click on the *SIGN IN*.
3. If you have forgotten your password, click on *Forgot Password*. A reset password link will be sent to your email address.

Note: After three unsuccessful attempts, you will be locked out and you will need to contact your MAXsys administrator.



Note: On this page are examples of messages you may receive if you enter wrong information.

2.3 Email and Password

If you enter the wrong details (Password and/or Email) you will receive the following message:

“Oops, the details your provided aren’t quite right.” Remember, you only have three attempts to sign in.

If you cannot remember your password, clickon *Forgot Password*.

A Password reset email will be sent with a link to re-set your new password

After three unsuccessful attempts, you will be locked out of the site.

You will receive the following message: *“Your account has been locked due to too many sign in attempts”.*

To unlock your account, click on *reset your password*.

A Password reset email will be sent to you with a link to re-set your new password.

Message: *“ Your Password has been reset. Please sign in using your new password”.*

Enter your details email and password.

Click on *SIGN IN*.

Notes:

If you experience any problems call the DMS Helpdesk 1800 307 551.

Welcome to
MAXsys

Oops, the details you provided aren't quite right.

Username
XXXX

Password
***** [Forgot Password?](#)

SIGN IN

Welcome to
MAXsys

Your Account (xxxxxxxxxxxx) has been locked due to too many failed sign in attempts.
To unlock your account please reset your password.

MAXsys is best viewed in Google Chrome™

Welcome to
MAXsys

Your password has been reset. Please sign in using your new password.

Username
XXXX

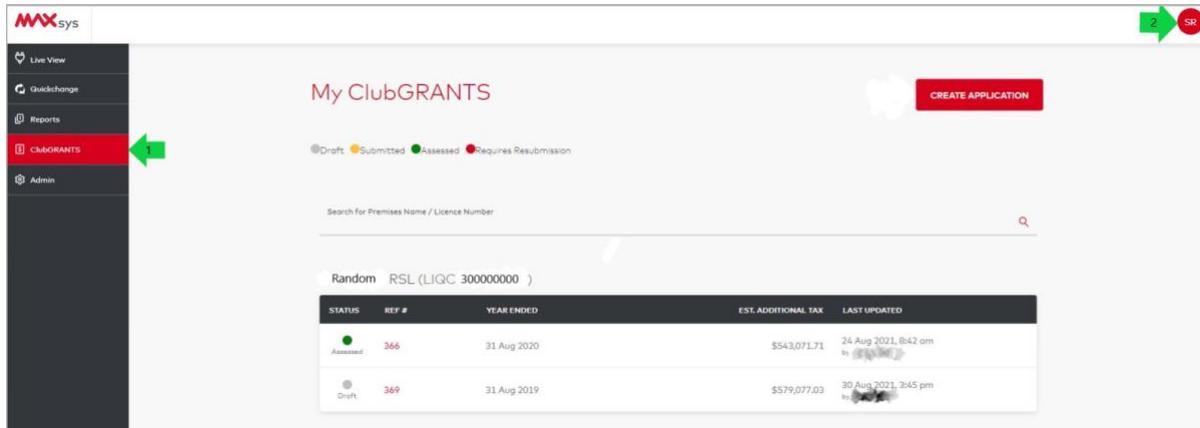
Password [Forgot Password?](#)

SIGN IN

MAXsys is best viewed in Google Chrome™

3 Starting an Application

3.1 My ClubGRANTS Landing Page



1. To access ClubGRANTS, Click on the ClubGRANTS menu item in the sidebar.

If you cannot see the ClubGRANTS icon and you should have access to ClubGRANTS, contact your MAXsys administrator.

If you want to return to the header page at any stage, click on the ClubGRANTS icon again or use the back arrow.

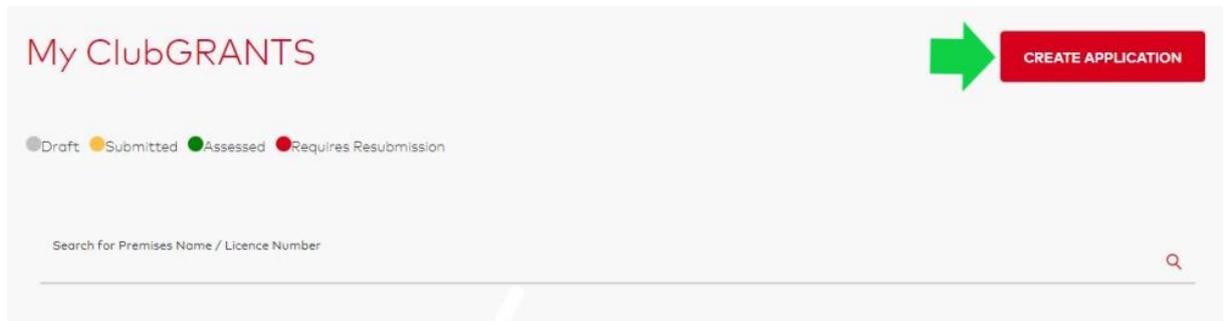
2. To sign out at any stage click on the dropdown arrow in the top right corner.

Follow the steps below to create an application.

Once you have started an application, the status of your application will be shown according to the following key.

Status	Description	Action
	Draft application – application in progress and can be amended prior to submission.	Edit and view the application.
	Application submitted – does not have an outcome yet.	View the submitted application.
	The Venue submission has been assessed.	View the assessed application.
	The Venue submission requires a resubmission.	View the application. View the re-submitted application.

3.2 Create an Application



1. Click on *Create Application* to start a new application.

2. If you manage a single premise, your premises name will appear automatically. If you manage and have access to multiple premises, click on the dropdown arrow and select the required premises.
3. Click on the dropdown arrow and select your ClubGRANTS tax year, i.e. *Year ended 31st August 2016*.
4. Click on *Start Application*.

Note: You can only have one submission per premises for each ClubGRANTS financial year unless the Regulator specifies a resubmission.

If a submission for a premise for the current year has been created, you will not be able to see that year in the dropdown menu.



3.3 Venue Information Fields

My ClubGRANTS CREATE APPLICATION

Draft
 Submitted
 Assessed
 Requires Resubmission

Search for Premises Name / Licence Number Q

Random RSL (LIQC 300000000)

STATUS	REF #	YEAR ENDED	EST. ADDITIONAL TAX	LAST UPDATED
● Assessed	366	31 Aug 2020	\$543,071.71	24 Aug 2021, 8:42 am by
● Draft	369	31 Aug 2019	\$579,077.03	30 Aug 2021, 3:45 pm by ral

- Once you have started the application, the application will appear in a draft status.

Information Fields	
1. Status	Draft (application in progress).
2. Ref #	Unique ID number of the submission.
3. Year Ended	Ending year of the submission <i>31 August 20xx</i> .
4. Est Additional Tax	Estimated additional tax field for the application (as per the tax calculation).
5. Last Updated	Date the application was last edited by the user.

- Click on the *Reference Number* to continue editing an existing ClubGRANTS application (draft).

Draft Application

Apply for ClubGRANTS Status: Draft
Last saved: 21 Nov 2017, 9:22 am

For year ended 31 Aug 2016

Submission Info	Reference # XX	Date 31 Aug	
Premises Info	Licence Number LIQC3XXXXXXXX	Premises Name MAXstysd	Suburb XXXXXXX
Exemptions	In-Kind Exemption Number	Exemption Amount (%) 20	ClubGRANTS Guidelines



Information Fields	
For year ended	Date application ending in the format for the year ended 31 August 20xx.
Status	Status of the application - draft application.
Last saved	Date the application was created or last saved by the user.
Submission Info/Reference #	Pre-populated: application reference number
Submission Info/Date	Pre-populated: date
Premised Info/Licence Number	Pre-populated: premises licence number
Premises Info/Premises Name	Pre-populated: premises name
Premises Info/Suburb	Pre-populated: premises suburb
Exemptions/ In-Kind Exemption Number	Editable field that allows users to enter a government provided exception ID Number. The completion of this field is required only if changing the default Exemption Amount. Refer to the Liquor & Gaming Website for application forms.
Exemptions/ Exemption Amount (%)	Pre-populated: Default exemption amount (percentage)



4 Completing an Application

4.1 Category 1 - Enter a New Recipient

The screenshot shows the 'Category 1 (1)' application form. The title bar indicates 'Amounts claimed to have been applied to specific Community Welfare and Social Services'. Below the title is a search bar for the recipient and a 'Sort by' dropdown. The main table has columns for '#', 'Name of Recipient', 'ABN', 'Purpose', 'LC Rec.', 'Cash Expenditure', and 'In-Kind'. A single row is visible with a green checkmark in the 'LC Rec.' column and zero values in the expenditure columns. Below the table is a 'Further and better particulars' section with a text area and a 'Draft' button. At the bottom right of the table area is a 'Delete' icon. A sidebar on the right shows 'RUNNING TOTALS' with values for 'Expenditure Required', 'Estimated Category 1', 'Estimated Category 2', 'Estimated Total', and 'Estimated Shortfall / Additional Tax'. At the bottom of the sidebar is a 'BACK TO TOP' button. At the bottom of the main form area, there are summary totals for 'Total Cash Expenditure', 'Total In-Kind', and 'Total Combined'.

#	Name of Recipient	ABN	Purpose	LC Rec.	Cash Expenditure	In-Kind
1	Name of Recipient	Number		<input checked="" type="checkbox"/>	\$ 0.00	\$ 0.00

Further and better particulars
Provide details on how this expenditure contributes to low income and disadvantaged people.

Auto Saved + Add Item

Total Cash Expenditure \$0.00 Total In-Kind \$0.00 Total Combined \$0.00

RUNNING TOTALS
Expenditure Required \$1,160,000.16
Estimated Category 1 \$ 0.00
Estimated Category 2 \$ 0.00
Estimated Total \$ 0.00
Estimated Shortfall / Additional Tax \$1,160,000.16

BACK TO TOP

1. Click in the *Name of the Recipient* field and enter the name.
2. Click in the *Number* field. Enter the ABN number.
3. Click on the arrow in the *Purpose* field and select one of the options.
4. Click the *LC Rec.* box if the funding is in accordance with the Local Committee's recommendations or social expenditure priorities or your LGA.
5. If applicable, record expenditure in the *Cash Expenditure* field.
6. If applicable, record a non-cash expenditure in the *In-Kind* field.
7. You can delete a row from Category 1 - Click on the icon.
8. To add an additional recipient, click on **+Add Item**.
9. Running totals are displayed on the right.

Note: You can use your *Tab* key and tab through the different fields instead of clicking on each one. The default for '*Cash Expenditure*' and '*In-kind*' expenditure is zero.



4.2 Filtering Multiple Recipients

Follow the steps below to sort or search for a specific recipient if multiple recipients have been added.

Category 1 (1)
Amounts claimed to have been applied to specific Community Welfare and Social Services

Search for Recipient

#	Name of Recipient	ABN	Purpose	LC Rec.	Cash E
1	Test	Number	A1 - Family Su	✓	\$

Further and better particulars

Sort by: #

- #
- ABN
- Name of Recipient
- Purpose
- LC Recommended
- Cash Expenditure
- In-Kind

Draft Delete

Auto Saved + Add Item

Total Cash Expenditure	Total In-Kind	Total Combined
\$0.00	\$0.00	\$0.00

1. Search for Category 1 Recipient

Enter the name of the recipient in the dynamic search field next to the search icon.

2. Filter on multiple recipients.

Click on the *Sort by* button. A dropdown menu will pop up. Click on the required sort option to sort the items (recipients) accordingly.

3. Filter on multiple recipients.

Click on the icon to sort the items (recipients) in ascending or descending order.



4.3 Category 1 - Fields

Field Name	Rules	Notes
Unique ID Number	N/A	Increments per row added, auto reindex until submitted.
Name of Recipient	Required	Searchable field.
ABN	Optional	Searchable field.
Purpose	Dropdown menu Required	Required and select only one.
LC Rec.	Click on the box.	If selected, "Yes" else is "No" <i>"Yes, if funding is in accordance with the Local Committee's recommendations or social expenditure priorities for you LGA. Otherwise, No."</i>
Cash Expenditure	Dollar \$ > = 0	Used to record cash eligible category 1 expenditure. No commas or spaces, only decimal point.
In - Kind	Dollar \$ > = 0	Used to record non-cash eligible category 1 expenditure. No commas or spaces between the numbers, only decimal point.
Further and better particulars	Required	Clubs must provide a description about how the funding provided meets the requirements of the ClubGRANTS guidelines. Otherwise, a tax rebate may not be applied.
Total Combined	Calculate Automatically	[Total cash expenditure] + [total in-kind]



4.4 Enter a New Category 2 Recipient

Category 2

Category 2 (2)

Amounts that have been applied to other ClubGRANTS Expenditure

Search for Recipient: 

Sort by:  

#	Name of Recipient	ABN	Purpose	Ass. w/ Club	Cash Expenditure	In-Kind
1.	Monster Inc	76 965 043 444	A - Sport	<input checked="" type="checkbox"/>	\$ 100.01	\$ 100.00
	<div style="background-color: black; color: white; padding: 2px;">Further and better particulars</div> Two					

 Submitted

The process to enter, edit, filter and search for category 2 recipients is the same as category 1.

- The *Sort Options* that are different to category 1 are:
Associated with Club?
- The *Purpose* dropdown menu has different options to select from category 1.



4.5 Category 2 - Fields

Field Name	Rules	Notes
Unique ID Number	N/A	Increments per row added, auto reindex until submitted
Name of Recipients	Is required	Searchable field
ABN	Optional	Searchable field
Purpose	Dropdown menu	Required and select only one.
Associated w/ Club.	Toggle	Associated with club. Tick box to select yes.
Cash Expenditure	Dollar \$ > = 0	Used to record category 2 cash expenditure.
In - Kind	Dollar \$ > = 0	Used to record non-cash category 2 expenditure.
Total Combined	Calculate Automatically	[Total cash expenditure] + [total in-kind]



4.6 Tax Calculation

Calculation of required ClubGRANTS -	
Premises Profit	
DESCRIPTION	GAMING MACHINE PROFIT
3 Months to August 2016	\$ 2,149,490.00
3 Months to May 2016	\$ 2,041,070.00
3 Months to February 2016	\$ 2,149,490.00
3 Months to November 2015	\$ 2,041,070.00
Total Profit	\$ 8,381,120.00
Less Threshold	\$ 1,000,000.00
Total Profit Less Threshold	\$ 7,381,120.00

1. You can expand [+] or collapse [-] the calculation for required application by toggling the [+/-] selector.
2. This is a view of the Gaming Machine Profits for the 4 quarters of this Venue. In this example the 15/16 tax year has been used.
3. The threshold is set to \$ 1,000,000.00 (The ClubGRANTS scheme applies to profits over a \$1 million).
4. Total Profit less Threshold is the balance of the Gaming Machine Profits, minus the threshold. This figure is required to calculate the minimum expenditure for category 1 and category 2.

Example:

$$\text{Total profit} = Q1 + Q2 + Q3 + Q4 = \$6,168,452.00$$

$$\text{Threshold} = \$1,000,000.00$$

$$\text{Total Profit less Threshold} = \$6,168,452.00 - \$1,000,000.00 = \$5,168,452.00$$



4.7 Expenditure vs Threshold

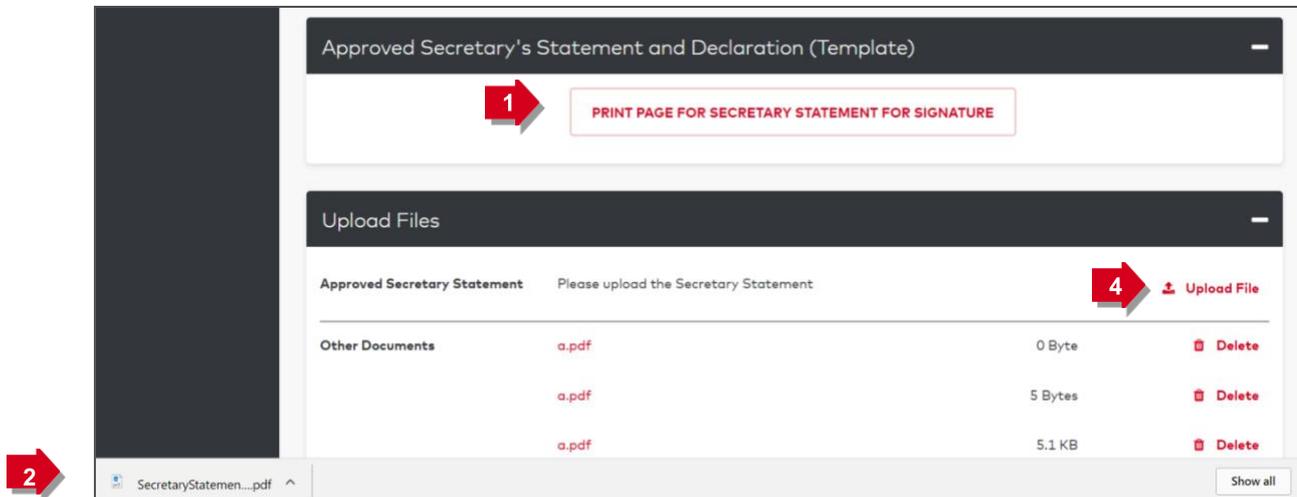
	CATEGORY 1	CATEGORY 2	TOTAL
Minimum Expenditure Required	\$38,763.39	\$56,852.97	\$95,616.36
Cash Expenditure	\$1,000.00	\$20.00	\$1,020.00
In-Kind Expenditure	\$0.00	\$0.00	\$0.00
Estimated ClubGRANTS Assessment	\$1,000.00	\$20.00	\$1,020.00
Estimated Shortfall / Additional Tax	\$37,763.39	\$56,832.97	\$94,596.36

Example Only Demonstrating the difference between <i>Excess</i> and/or <i>Shortfall</i> for Category 1 and Category 2.		
Items	Category Notes	Total
Total Profit Less Threshold	Total Profit - Threshold \$6,168,452.00 - \$1,000,000.00	\$5,168,452.00
Minimum Expenditure Required	Category 1: 0.75% of Total Profit Less Threshold Category 2: 1.1% of Total Profit Less Threshold	\$38,763.39 \$56,852.97
Cash Expenditure	Category 1: Total Category 1 Cash Expenditure Category 2: Total Category 2 Cash Expenditure Total: Category 1 Expenditure + Category 2 Expenditure	\$1,000.00 \$20.00 \$1,020.00
In-Kind Expenditure	Category 1: Category 1 In-Kind Expenditure Category 2: Category 2 In-Kind Expenditure	\$0.00 \$0.00
Estimated ClubGRANTS Assessment	Category 1: Sum of Category 1 Cash Expenditure and In-Kind Expenditure Category 2: Sum of Category 2 Cash Expenditure and In-Kind Expenditure	\$1,000.00 \$20.00
Estimated Shortfall/Additional Tax	Category 1: Shortfall: \$38,763.39 - \$1,000.00 Category 2 : Shortfall: \$56,852.97 - \$20.00 Total: This field automatically estimates additional tax payable due to a shortfall in ClubGRANTS expenditure. An excess in Category 1 Expenditure will reduce the additional tax due to a shortfall in Category 2 expenditure. However, an excess in Category 2 expenditure will not reduce the additional tax due to a shortfall in Category 1 expenditure.	\$37,763.39 \$56,832.97 \$94,596.36
Notes: The calculation for the Estimated Tax will not include any In-Kind expenditure exceeding the 20% limit and will not include any In-Kind exemption you may have been granted.		

5 Submitting an Application

5.1 Uploading Files (including Secretary Statement)

1. Click here to download the *Secretary's Statement*.



Note: It is mandatory to attach a secretary's statement.

2. The *Secretary Statement* will download here. Click on the PDF document to open the document (Refer to example of the statement on the next page).
3. There are two ways to enter in the required details.
 - a. Download, enter the required details and save.
 - or
 - b. Print the PDF, enter the required details and complete with required signatures. Scan and save a copy of the statement.
4. Click to upload the *Approved Secretary's Statement*.
Note: You CANNOT delete the Secretary's Statement once uploaded.

Notes:

1. Only upload an approved secretary's statement, in the *Secretary Statement* section
2. Other files can be uploaded below, under *other documents*.
3. You can download all files you have attached.
4. You can also delete files you uploaded, except for the Secretary's statement, as the inclusion of this document is mandatory for submission.



Enter Required Details on Secretary Statement

FM2021

Approved club Secretary's statement and declaration



Department of Industry
Liquor & Gaming

Before you complete this form

What this form is for

This declaration must be signed by the club's Secretary/Manager when claiming donations and expenditure made towards community development and support projects and services as eligible for rebate under the ClubGRANTS Scheme for a specific club gaming tax year.

A club lists the donations and expenditure made towards specific community development and support projects and services as eligible under the ClubGRANTS Scheme for a specific club gaming tax year.

How to lodge this form

To be uploaded as part of your ClubGRANTS returns in the Liquor & Gaming NSW ClubGRANTS Portal.

Need more information?

liquorandgaming.nsw.gov.au
clubgrants@liquorandgaming.nsw.gov.au
 1300 024 720

Declaration

I, Mr Ms Mrs Miss Other

Given name

Middle name

Family name

of (street address)

Suburb/town/city

Premises number

Street address

Suburb/town/city

State Postcode

2. My contact details are

Daytime phone

Email



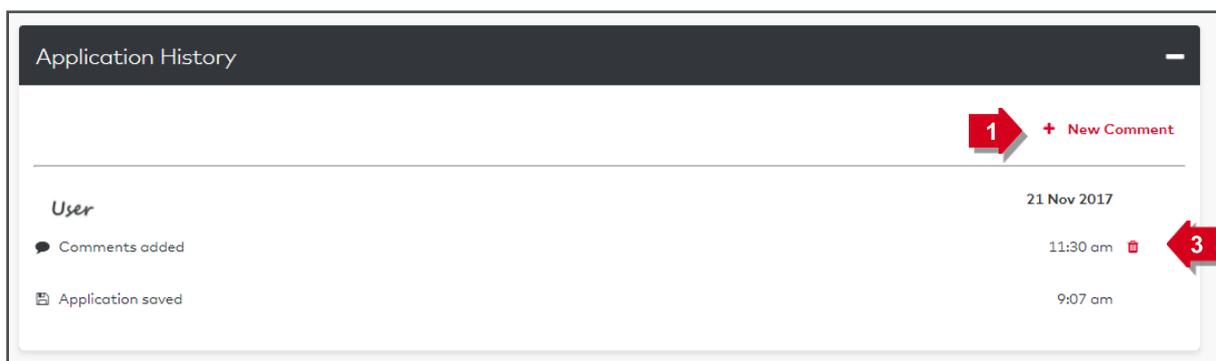
1. Complete the PDF statement by entering the information in the blue shaded area.
2. Save this document (on your device). You can print it at a later stage.

Note: Your secretary must sign and date the document and a Justice of Peace must witness the document. (Follow the instructions on the save menu bar to save from here).

5.2 Application History Icons

Text	Icon	Notes
Application saved		You saved a draft application.
Comment added		You added a comment.
Application submitted		You submitted an application.

5.3 Adding a Comment



1. Click on + *New Comment* to add a comment.
2. Once comment has been added, click on *Add Comment*.
3. Click on the delete  icon to delete comments.

Notes:

You can **ONLY** delete a comment you have added in the current version.

You cannot delete any comments another user has added.

You cannot delete any comments that the system has created.



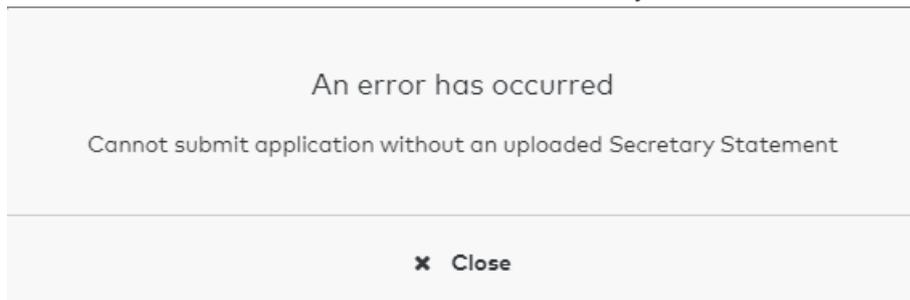
5.4 Saving or Submitting an Application



1. Any changes are saved automatically. However, to ensure the draft has been saved Click on *Save Draft*.
2. Click on *Submit Application* if you are ready to submit the application to the Regulator.

5.5 Submission Error

1. If any of the line items are invalid, you cannot submit the application. The line items with errors are highlighted.
2. If there is no *Secretary's Statement* attached you cannot submit the application. Close the 'error' box and attach the Secretary Statement.



3. Once you have resolved any errors click on *Submit Application*.



6 Reviewed Applications

6.1 Assessed Application

NOTES:

- The status of your document will remain a draft document until you submit the application.
- If “Save Draft” is clicked on an Assessed application, the application will return to a draft state.

The screenshot shows the 'My ClubGRANTS' interface. At the top right is a red 'CREATE APPLICATION' button. Below it are status indicators: Draft (grey), Submitted (yellow), Assessed (green), and Requires Resubmission (red). A search bar is present with the text 'Search for Premises Name / Licence Number'. Below the search bar, there is a dropdown menu showing 'Random RSL (LIQC 300000000)'. A table below displays application details:

STATUS	REF #	YEAR ENDED	EST. ADDITIONAL TAX	LAST UPDATED
Assessed	366	31 Aug 2020	\$543,071.71	24 Aug 2021, 8:42 am

1. ClubGRANTS landing page: application assessed by the Regulator will display a **green** status.
2. CLICK on the *reference number* to view assessed application.

Application Assessed/Assessed with Edits – Example

The screenshot shows the 'Apply for ClubGRANTS' page. At the top right, it says 'Status: Assessed' and 'Last saved: 24 Aug 2021, 8:42 am'. Below this, it says 'For year ended 31 Aug 2020'. A green banner at the top of the application details says 'The application was assessed on 24 Aug 2021, 8:42 am' with a 'View reason(s)' link. The application details are organized into sections:

- Submission Info**: Reference # 366, Date 24 Aug 2021, 8:40 am
- Premises Info**: Licence Number LIQC300000000, Premises Name Random RSL, Suburb Springfield
- Exemptions**: In-Kind Exemption Number, Exemption Amount (%) 20

A link for 'ClubGRANTS Guidelines' is located at the bottom right of the application details.

If the Regulator has changed any details in the application during the approval process, the modified item will display “Assessed with edits”.



#	Name of Recipient	ABN	Purpose
1	Test_1	Number	A2 - Ch
	Further and better particulars	Test_1	

Assessed with Edits

Requires Resubmission 370 31 Aug 2019 \$1,332,931.82 30 Aug 2021, 5:56 pm by

6.2 Resubmission Required

1. ClubGRANTS landing page: an application requiring a resubmission will display a **red** status.
2. CLICK on the *reference number* to view application.

Application Required Resubmission - Example

Apply for ClubGRANTS 1 Status: ● Requires Resubmission
Last saved: 18 May 2018, 5:21 pm

For year ended 31 Aug 2016

The application was flagged as requiring resubmission on 18 May 2018, 5:21 pm View reason(s)

Submission Info	Reference # XX	Date 15 Sep 2017, 11:55
Premises Info	Licence Number LIQCXXXXXXXX	Premises Name XXXX XXXXX
Exemptions	In-Kind Exemption Number	Exemption Amount (%) 20

[ClubGRANTS Guidelines](#)

1. The (**red**) status of this example application indicates the application requires a resubmission
2. The heading is highlighted **red** and it states: *The application was flagged as requiring a resubmission on 18 May 2018, 5:21 pm.*
3. Click on the *View Reason(s)* button. This will display the *Application History* with reason(s).



6.3 Rejected Application – Reasons

Under *Application History* you will find the reasons for the resubmission required of this application.

- The **red** indicates resubmission required.
- The **green** indicates that it has been assessed.

The screenshot shows the 'Application History' interface. At the top right, there is a '+ New Comment' link. The history is organized by date, with '30 Aug 2021' appearing multiple times. Each date entry lists several events with icons and timestamps. Status indicators are used: a green checkmark for 'Application assessed' and a red exclamation mark for 'Application flagged as requiring resubmission'. The text 'Application requires resubmission' is also in red. Other events include 'Submitted Application' and 'Draft saved'.

Note: Discussions on any changes to an application must be made directly with the Regulator not the Max Help Desk.

If you scroll up on this page, the rejected item will be indicated in red as per below.

The screenshot shows the 'Category 1 (1)' interface. At the top, it says 'Amounts claimed to have been applied to specific Community Welfare and Social Services'. Below this is a search bar and a 'Sort by' dropdown. A table lists recipients with columns for '#', 'Name of Recipient', 'ABN', 'Purpose', 'LC Rec', 'Cash Donations', and 'In-Kind'. The first row shows 'Recipient1' with a green checkmark in the 'LC Rec' column. Below the table, there is a 'Further and better particulars' section with the text 'Details as per specification'. A red square icon labeled 'Rejected' is visible. At the bottom, there is an 'Auto Saved' indicator and an '+ Add Item' link. A summary table at the bottom right shows 'Total Cash Donations: \$0.00', 'Total In-Kind: \$0.00', and 'Total Combined: \$0.00'.



6.4 Resubmitting an Application

Category 1 (1)

Amounts claimed to have been applied to specific Community Welfare and Social Services

Search for Recipient

Sort by

#	Name of Recipient	ABN	Purpose	LC Rec	Cash Donations	In-Kind
1	Recipient1	Number	A1 - Family Su		\$ 10,000.00	\$ 5,000.00

Further and better particulars Details as per specification

Rejected

Auto Saved Add Item

Total Cash Donations \$0.00 Total In-Kind \$0.00 Total Combined \$0.00

1. Rejected items cannot be edited but a new row can be added (**+ Add Item**) to the application with updated details.
2. If you are not ready to submit the changes, Click *SAVE DRAFT*.
3. If you are ready to resubmit the application, Click *SUBMIT APPLICATION*.

NOTES:

1. You can **+add** a new row for Category 1 and 2 items to resubmit the Application.
2. Assessed row is indicated in **green**.
3. You can delete any comments you have added in the current version.
4. You **cannot** delete any comments another user has added.
5. You **cannot** delete any comments that the system has created.
6. If the application is in a "Submitted" state and L&GNSW has made some adjustments to the application, then the landing page values will mismatch the application details until L&GNSW either assesses the application or marks it as requiring resubmission.

7 ClubGRANTS Reports

There are two reports available for venues to view details of the ClubGRANTS information they have entered in the MAXsys system. These are:

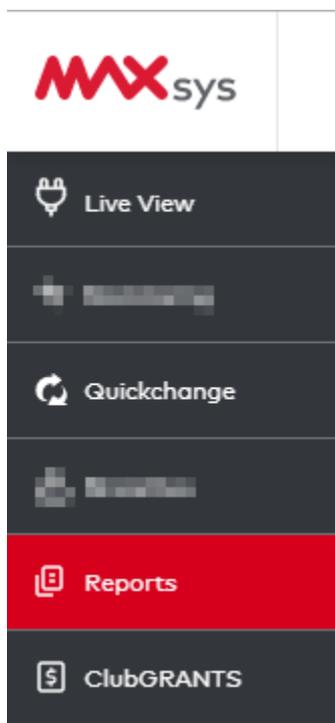
1. Actual ClubGRANTS Summary; and
2. Actual ClubGRANTS Details.

These reports provide a summary view of the ClubGRANTS data, as well as a more detailed view of all grants that have been recorded on the ClubGRANTS application in the system.

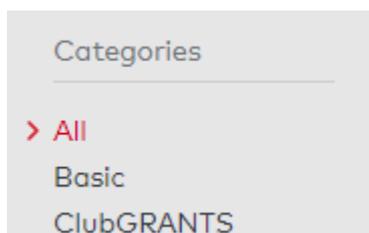
These reports can be printed or exported as required.

7.1 Accessing Reports

The ClubGRANTS reports are accessed by selecting the Reports icon in the MAXsys menu.

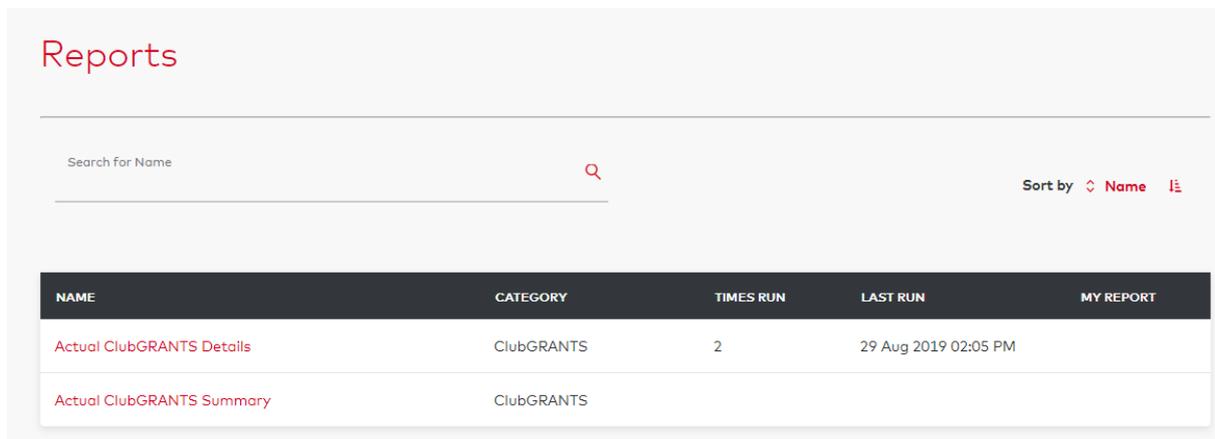


The submenu will provide a broken-down set of categories to be able to navigate to the desired reports. Selecting ClubGRANTS will provide a list of the ClubGRANTS related reports to run.



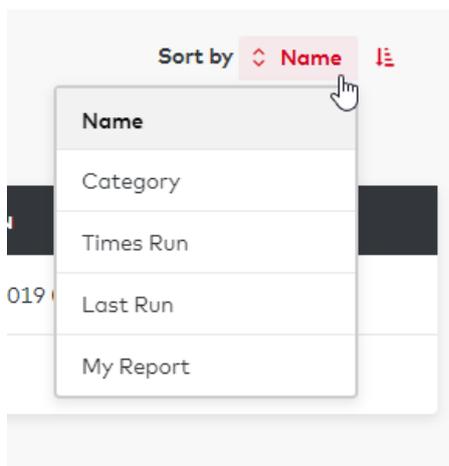
7.2 Main Reports Screen

Once the ClubGRANTS category has been selected, the following screen will be presented.



The search field allows you to quickly find a report by name. Typing the name of a report will dynamically filter the list to only show reports that match the text that has been entered.

The list of reports can be sorted based on the column values.



7.3 Common Report Features

The report screens have several common features across all reports. These include:

1. Export functionality
2. Report Customisation Options
3. Column Selection/Column Sizing



7.3.1 Export functionality

Each report has the option to export into PDF, CSV or Excel format.



Selecting the appropriate export format will automatically trigger the export of the report data. Each export will include any parameters that were used in the production of the report, such as:

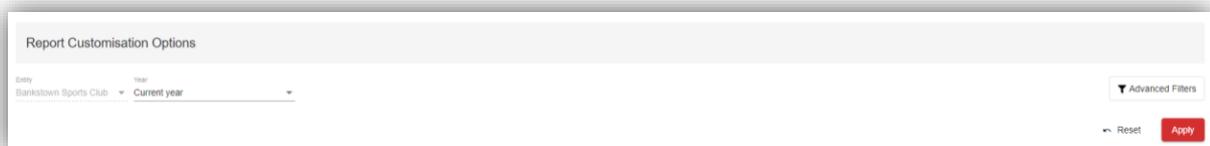
1. Who ran the report?
2. The sorting criteria
3. When the report was run.

If there are specific selections made relevant to the report, these will also be included.

7.3.2 Report Customisation Options

Each report screen has an initial section showing the Report Customisation Options. This section contains any selection criteria required for the current report, along with a set of advanced filters that can be manipulated to filter and format the report data to show and display only the data that you are interested in seeing. The advanced filters are hidden until the Advanced Filters button is selected.

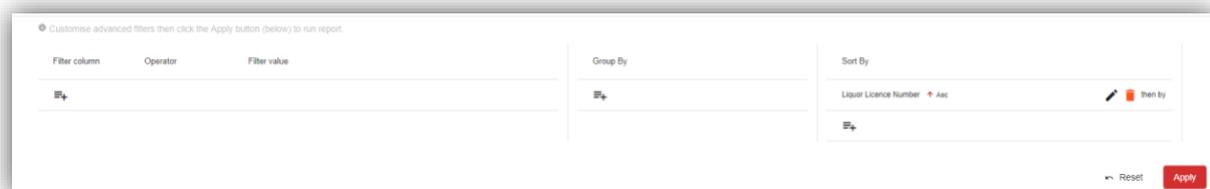
An example of this can be seen on the 'Actual ClubGRANTS Summary' report.



In this example, we have the option of selecting which year we would like to view the summarised data for. If the logged in user has access to this ClubGRANTS report for multiple venues, they would also be able to select the entity for which they want to report on. Once the selection is made, the user clicks on the Apply button to apply the selection to the report.

7.3.2.1 Advanced Filters

Selecting the "Advanced Filters" button in the Report Customisation Options section will display options for filtering, grouping and sorting the report data.



7.3.2.1.1 Filtering Data

The first section of the 'Advanced filters' is used for the filtering of report data based on criteria that is user defined.

Filter column	Operator	Filter value
☰+		

Selecting the ☰+ icon will add a new row to the filtering criteria.

Multiple filtering conditions can be input by adding additional rows using the ☰+ icon.

Filter column	Operator	Filter value
Filter on...	Operator...	Filter value...
✓ 🗑️		

Filtering conditions can be accepted by selecting the ✓ icon at the end of the line.

Selecting the 🗑️ icon will delete a filtering row.

Selecting the ✎ icon on a previously entered row will allow it to be changed.

7.3.2.1.1.1 Filter Column

The 'Filter on' drop down will allow the selection of any of the columns that are contained within this report. For the Actual ClubGRANTS Summary report, this looks like:

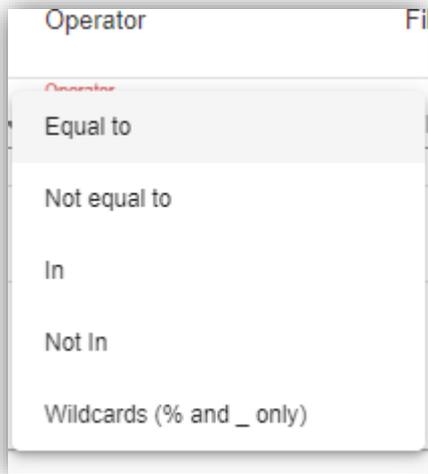
Filter column Ope

Filter on

- Licence Details
- Suburb
- LGA
- Reference
- Date of Submission
- Count of Recipients
- Exemption #

7.3.2.1.1.2 Operator

The operator drop down offers options relevant to the type of data contained in the filter column. An example of a text-based field has 5 options, relevant to a text-based selection below.



Number fields will have different options such as 'greater than', and 'less than' which are meaningful mainly to number-based fields.

Operator	Meaning
Equal to	The value in the report must exactly match the specified value contained in 'Filter value'
Not equal to	The value in the report must NOT match the specified value contained in 'Filter value'
In	The value in the report exactly matches the selected items contained in the 'Filter value'
Not In	The value in the report does not match the selected items contained in the 'Filter value'
Greater than	The value in the report is greater than the specified value contained in 'Filter value'
Less than	The value in the report is less than the specified value contained in 'Filter value'
Greater than or equal to	The value in the report is greater than or equal to the specified value contained in 'Filter value'
Less than or equal to	The value in the report is less than or equal to the specified value contained in 'Filter value'
Wildcards (% and _ only)	The value in the report matches the wildcard specification contained in the 'Filter value' (See details below).

Wildcards

Two special characters, referred to as wildcards, can be used to provide greater flexibility in the filtering of data. These are the ‘%’ and ‘_’ characters, where the ‘%’ character will match 0, 1, 2 or more characters, and the ‘_’ that matches exactly one character, regardless of the value of the character.

The following table provides some examples of these wildcards.

Example	Meaning
A%	Finds any values that start with “A”
%A	Finds any values that end with “A”
%or%	Finds any values that have “or” in any position
_r%	Finds any values that have “r” in the second position
A__%	Finds any values that start with “A” and are at least 3 characters in length (note the 2 underscores)
A%o	Find any values that start with “A” and end with “o”

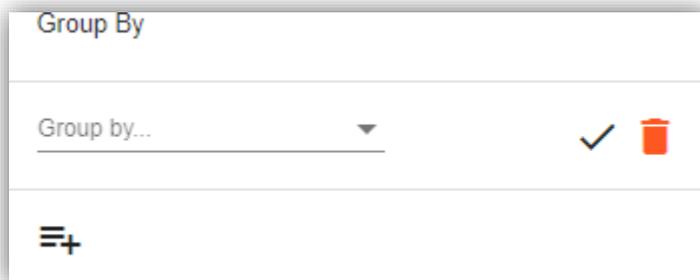
7.3.2.1.1.3 Filter value

The filter value allows you to specify the criteria that you want to filter against, based on the ‘Filter on’ and ‘Operator’ selections. The options for filling out the filter value change based on the operator selection. Where possible, the filter value will provide a drop-down list to allow for selection of allowable values.

Where this is not possible, the Filter value can be filled with text.

7.3.2.1.2 Grouping Data

The second section of the Advanced Filters allows the report data to be grouped and sub grouped.

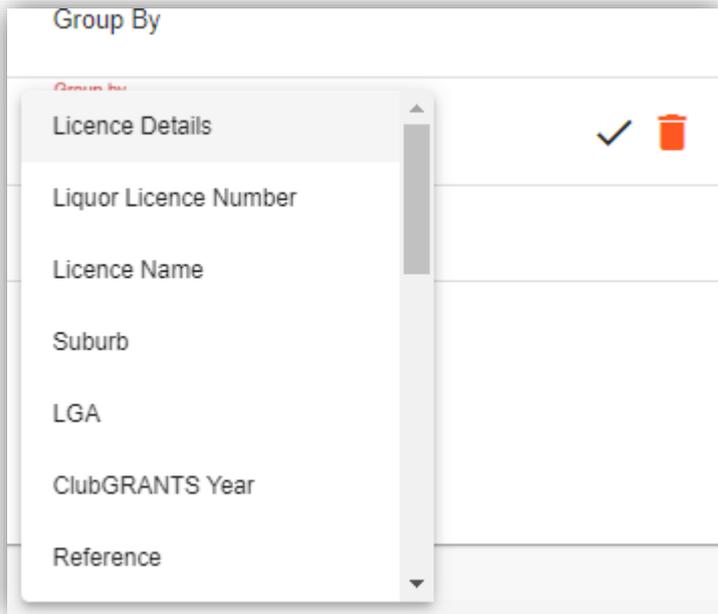


This set of options works similarly to the Filter section. New rows are added by selecting the

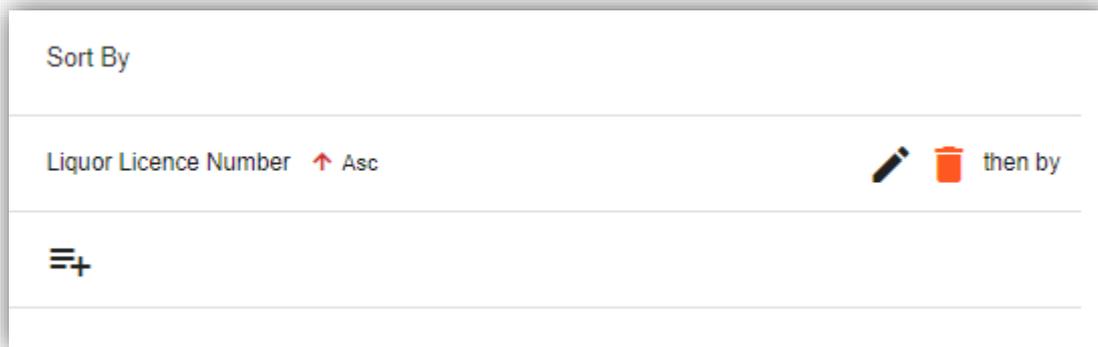
 icon, and editing and deleting grouping items are actioned through the   options.

Selecting the ‘Group by’ will give a drop-down list of the columns that the data should be grouped by.

An example of this drop-down for the ‘Actual ClubGRANTS summary’ report is shown below.



7.3.2.1.3 Sorting Data



The final section of the 'Advanced Filters' controls sorting.

This section will show the default sorting that is applied to the report data. In the example above, the default sorting is based on the Liquor Licence Number and is sorted in an ascending order.

To adjust this sorting record, select the  icon.

To add some additional sorting criteria, select the  icon.

When a new row is added, the user is provided the following information:



Selecting the 'Sort by' drop-down will provide a list of columns that can be sorted by. Selecting the 'Order' drop-down allows the user to sort in an ascending or descending order.

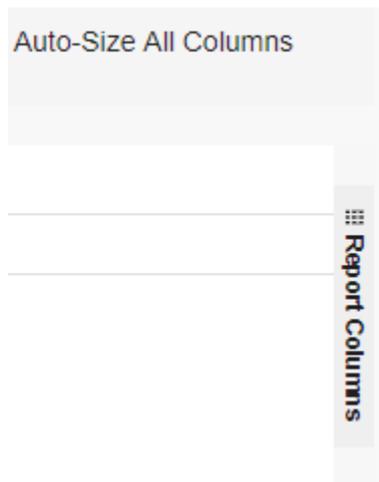


7.3.3 Column Selection/Column Sizing

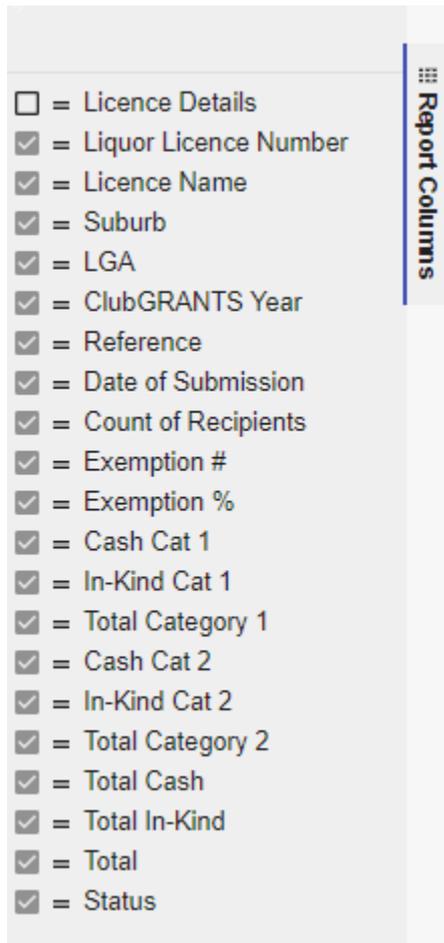
The main section of the reporting screen has options to auto-size the columns, and also to select/deselect columns to be shown in the report.

Selecting the **Auto-Size All Columns** will automatically grow/shrink columns to fit the report data based on the contents of those columns.

The columns displayed in the report are controlled through the 'Report Columns' icon on the RHS of the report.



Selecting the 'Report Columns' will provide a selectable list for controlling the enabling/disabling of a particular column of data. For the 'Actual ClubGRANTS Summary', this is shown as:

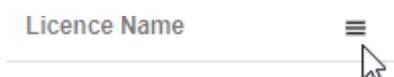


Selecting a checkbox will include the column in the report. Deselecting a checkbox will remove the column from the report.

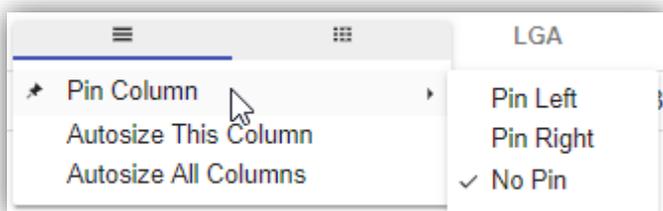
Once selections/deselections have been made, click on the 'Report Columns' icon again to hide the panel.

7.3.3.1 Report Column Operations

Hovering the mouse over any column in a report will display an icon to allow operations to be performed on the column.



Selecting this icon show the following menu:





Pin Column will allow the column to be pinned to the LHS or RHS of the report. Once pinned, the column will remain fixed and visible when the remaining report columns are scrolled left and right (similar to the Microsoft Excel freeze pane option).

The Auto size options will allow the shrinking/expanding of either this column, or all columns, to fit the data contained in the column.

7.4 ClubGRANTS Reports

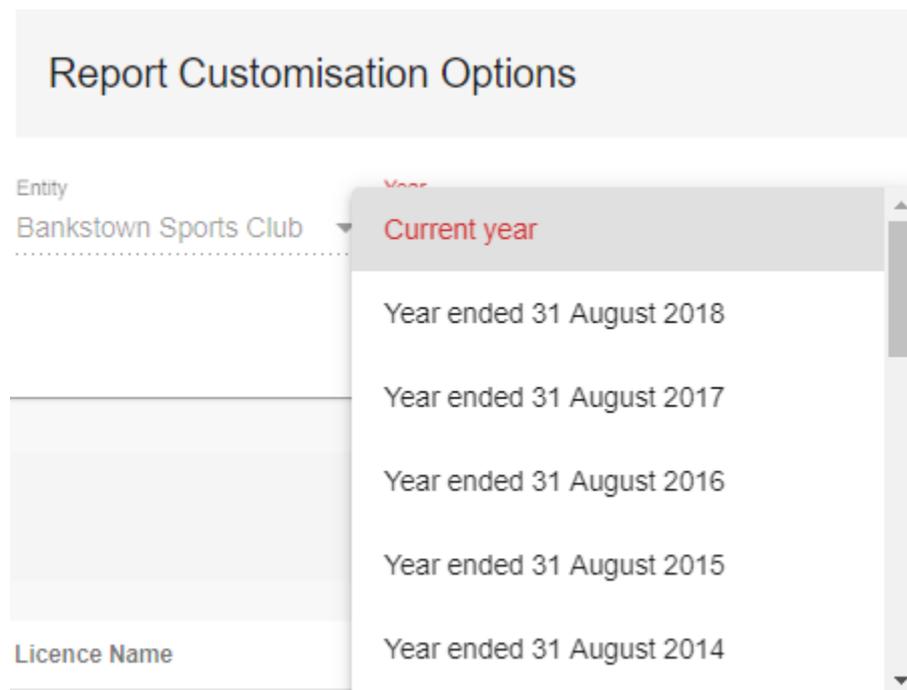
There are two reports available for ClubGRANTS users. These are:

1. Actual ClubGRANTS Summary; and
2. Actual ClubGRANTS Detail.

7.4.1 Actual ClubGRANTS Summary

The summary report provides a summarised record of the ClubGRANTS applications provided by the selected venue for the selected year.

Options for the year can be any completed Club financial year, or the current year.



The details provided on the report include:

- Total Cash contributions granted under the Category 1 scheme;
- Total Cash contributions granted under the Category 2 scheme;
- Total In-Kind contributions granted under the Category 1 scheme;
- Total In-Kind contributions granted under the Category 2 scheme;
- Total Cash + In-Kind contributions granted under the Category 1 scheme;
- Total Cash + In-Kind contributions granted under the Category 2 scheme;
- Total Cash contributions granted under the Category 1 scheme;
- Total combined Cash contributions granted under both Category 1 and Category 2 schemes;



- Total combined In-Kind contributions granted under both Category 1 and Category 2 schemes;
- Total combined Cash + In-Kind contributions granted under both Category 1 and Category 2 schemes;
- Application status

7.4.2 Actual ClubGRANTS Details

The Actual ClubGRANTS Details report provides a list of grants that have been included on the application. Each grant includes information including:

- Grant Recipient
- ABN
- Purpose
- LC Recommended
- Category
- Cash contribution made under Category 1
- Cash contribution made under Category 2
- In-Kind contribution made under Category 1
- In-Kind contribution made under Category 2
- Total contribution made under Category 1
- Total contribution made under Category 2
- Total Cash contribution across all categories
- Total In-Kind contribution across all categories
- Total contributions across all categories
- Grant status
- Grant Line Status