



DataSpace Live

Home worker - Agile Module Functionality Guide

(Last Updated Feb 2020)

Green – Available in basic version

Orange – Can be configured

Red – Not available in Home worker version

Functionality Listed may require other modules – Office Functionality is listed by default.

As DataSpace-Live is available as separate modules all functionality should be checked if ordering anything other than an office license as some functionality listed is dependent on other modules.

If in doubt please ask your account manager.

MODULE – APPLICATION MANAGEMENT – BASIC HOME WORKING ACCOUNT

- Module for managing Applications/Projects of any type (user defined possible)
- Full Document Management with Version Control
- Integrated Viewing/Redline/Calibrate/Measuring for 150+ File formats (No plugins reqd)
- Includes Correspondence Management Outlined below
- Log phone calls, letters, notes, with High importance for highlighting payment issues
- View/Edit add Address details, Applicant, Agent, Work location
- Google Map/Streetview integration – Application map pinpoint for Land charges exports
- Quick-fill for sharing any application information with 3rd party systems
- **XML output for automated integrations**
- Auto status update notifications for Applicants/Agents
- **Smart-Form user defined case/project facilities**
- Standard Document creation and data insertion facilities
- Live overview – Unlimited User defined details storage with tab categories
- **Live-overview auto-population**
- Multi-plot/flat/unit configuration and Management
- Logged activity
- Scanned/Manual application/project creation
- Archive application/project creation
- Archive application/project management
- Sophisticated search facility
- Activity based search
- Cross-linked application access

MODULE – CORRESPONDENCE MANAGEMENT BASIC HOME WORKING ACCOUNT

- Send emails via the system
- Auto population of application/project contacts for outbound emails
- Auto Referencing of application/project
- Auto link back to application for Applicant/Agent/Site Contact
- Mail forwarding (to record against case) for emails arriving directly from 3rd parties
- Lead-in emails to promote response inside the system to reduce admin overhead
- Auto-forward of emails/responses received by system to outlook email addresses
- Convert Emails to PDF for sharing with third parties
- Address book

MODULE – PLANSHARE BASIC HOME WORKING ACCOUNT

- Share any set of documents with anyone via email
- Define Document Sets by Folder
- Choose share profile View/Comment/Download/Upload/Share
- Time Limited Shares
- No costs involved for person shared with
Full viewing/redlining/Measure/Calibrate etc
- When used with Inspection Module allows 3rd party to carry out Inspections
- When used with Plan-checking module, allows 3rd party to do Plan-checking
- Auto-created Planshare “Client Folder”, auto notifies client of any documents added to folder such as Approval/Completion Certificate, List of approved Plans etc. No need to email
- Logged Activity

MODULE – PLAN-CHECKING ENHANCED HOME WORKING ACCOUNT

- Regime/Checklist Creation & Assignment
- Checklist Template system
- Raise Issues on Checklist -Outstanding/Being Assessed/Approved
- Logged Activity
- Document Folder for highlighting Issues (Includes Redlining with Office)
- Checked Plans/Document Flagging system
- Notify Applicant/Agent by email
- PDF Plancheck Reports, Outstanding or Full
- External Plan-Checking Support when used in conjunction with Planshare
- Lead-in for Agent to respond to Plan-check queries directly
- Auto-Created Approval Certificate & Approved Document List Report

MODULE – INSPECTIONS (DATASPACE LIVE) ENHANCED HOME WORKING ACCOUNT

- Regime Creation
- Regime Template Creation
- Base Inspection Types Management
- Inspection Booking
- Assign Officer
- Daily Inspection Workload Planner with Map-View
- Work Location – Google Street View Integration
- Inspection Documents – Preload
- Inspection Required Questions View
- Inspection Notes – Complete & View
- Inspection Actions – Complete & View
- Inspection Regime History/Activity
- Edit Notes/Comments
- Daily Inspection Report
- Case Inspection Report
- Notifications for Surveyors
- Daily Inspections List Notification
- Site Contact Management
- Bespoke Reporting
- Multi-plot/unit/flat comment duplication and options

MODULE – INSPECTIONS (INSPECTMATE) APP ENHANCED HOME WORKING ACCOUNT

- Daily Inspection List & Google Map
- Link to Google Navigation
- Links to Site Contact SMS and Direct Call (Including Templates)
- Sync Today/Tomorrow/All (Requires Connection)
- Self-Clean Functionality
- Complete Inspection, with Notes/Actions
- Add Notes/Actions/Standard Notes
- Dictate Notes
- View Documents/Plans
- View/Complete Required Questions
- Outstanding Action Alerts
- View Application Details/ Agent/Applicant/Site Contacts
- Get Documents (Requires Connection)
- Add Photos (Take Photo/Multiple or from Gallery)
- Dictate Photo Descriptions
- Respond to Actions
- Notify Site Contacts of Notes/Comments/Actions
- Site Contact Management
- Book future Inspection
- Google Navigation Integration
- iOS/Android

SITE CONTACT APP NOT AVAILABLE CHARGES APPLY

- Site Contact can request Inspections
- Site Contact can view shared inspection notes
- Site Contact can view “Actions”
- Site Contact can respond to “Actions”
- Site Contact can provide Photos in support of resolved actions

MODULE – PAYMENT INTEGRATION NOT AVAILABLE CHARGES APPLY

- Request Payments
- Payment Portal Integration – Most Payment Systems Covered
- Payment Codes handled
- Request multiple Payments, Plan fee, Inspection Fee etc
- Record Cheques, Payment Over the counter
- Record Phone Payments
- Generate Payment Reports
- Re-send request
- Manual Updates
- Record Authorisation ID's

MODULE – WORKFLOW NOT AVAILABLE CHARGES APPLY

- Use system via a to-do list
- Push applications/projects to next person/group in process
- Record Who/When Signed Off and any Comments
- Separate Workflow per application/Project type
- Multiple Workflows per Application Type
- User defined Groups
- On rejection move back down the process
- Management Overview
- Optional timescale Management
- Optional email notification/chasing
- Re-Assignment on absence/load balancing
- User defined reporting/scheduling of reports
- Auto emailing of reports
- Auto-linking of status updates
- Logged audit-Trail

MODULE – ADMIN TOOLS & REPORTING NOT AVAILABLE CHARGES APPLY

- Add/Remove/Update organisation users
- Add/Remove users from Workflow groups
- Full user defined and System defined reporting
- Reporting on Application/Project, Inspections, Plan-checking, Live-Overviews, Payments
- Reporting on Workflow
- Reporting on Smart-Form data
- Inspection Management
- Plan-check Management
- Smart-Form management
- Standard Document Management
- Report Scheduling
- Live-Overview configuration and management
- Back Office ID creation Configuration
- Authority/Organisation Configuration
- Comment Category configuration
- Storage Analysis

MODULE – BRANDED SITE NOT AVAILABLE CHARGES APPLY

- Corporate Graphics and Branding
- Bespoke xxxx.dataspacelive.co.uk address where xxxx is your name.

MODULE – SUBMITAPLAN

- Portal for building control applications, Full Plans, Building Notice, Regularisation, Replacement Doors and Windows as standard
- Ability for client to supply Documents and Plans, no upload limits
- Optional Dangerous Structures, Section 80, Initial Notice, Reversion
- User defined form creation from template, including Database Creation and Reporting
- A true 2 way portal
- Ability for client to track application, upload additional or revised files
- Ability for client to Request site inspections
- Ability for client to contact authority with reference to application
- Ability for client to be involved in Plan-checking requests
- Branded Authority landing page
- Bespoke Fees link
- Local Authority Contact-Us facility