PlanCheck

Draft manual

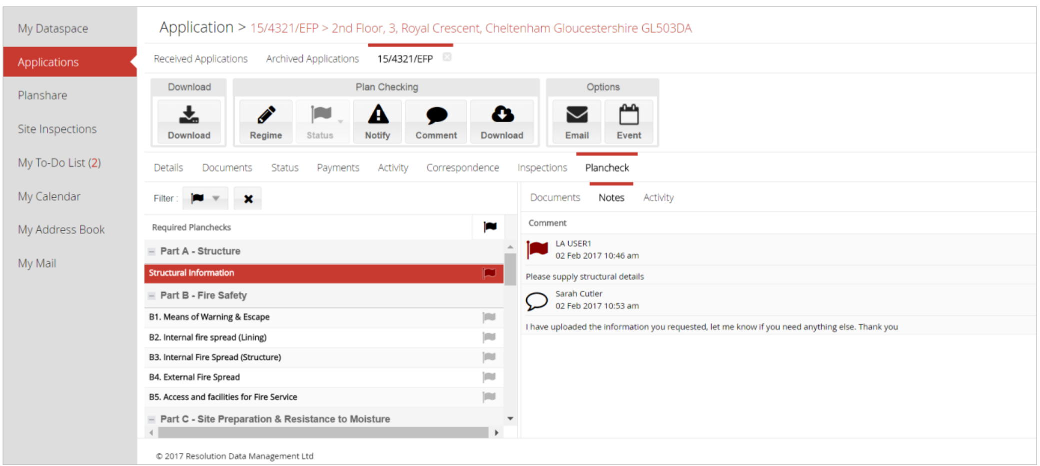
Introduction

Note: This is a draft manual due to this module being a newly developed release to DSLive. This means that some of the details and processes in this guide may change.

Located under a new **'PlanCheck'** tab within each online application, our new plan-checking solution enables authorities to assess and comment on plans against a comprehensive 'Required Check List' online within DSLive.

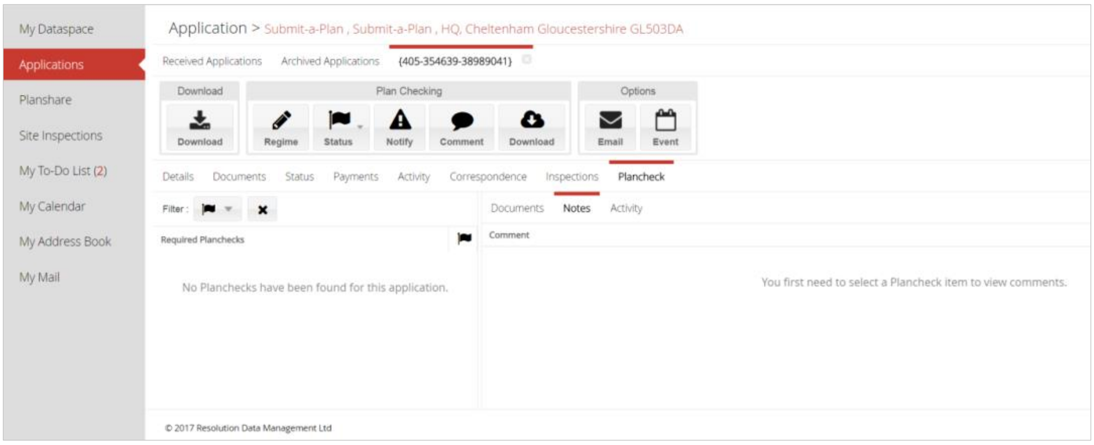
As an authority works their way through the check-list coloured flags can be assigned to represent whether a check is approved or has outstanding issues. The authority can add comments and requests for further documents and information. The **'Notify'** button enables the authority to then send a notification email or text message of the issue and required action straight from DSLive to the applicant or agent. The applicant can then login in to their Submit-a-Plan account to view the details, respond with comments and upload any documents or information as required.

Three smaller tabs labelled **'Documents', 'Notes'** and **'Activity'** logs and records all conversations, uploads and activity taking place between the plan-checker and applicant/agent throughout the entire plan-checking process.

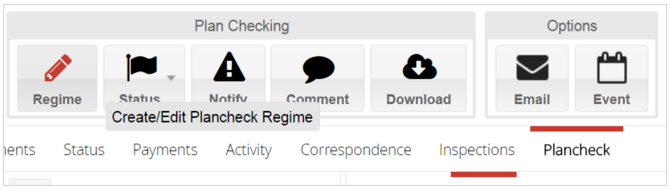


Section A: Creating Your PlanCheck Check-List

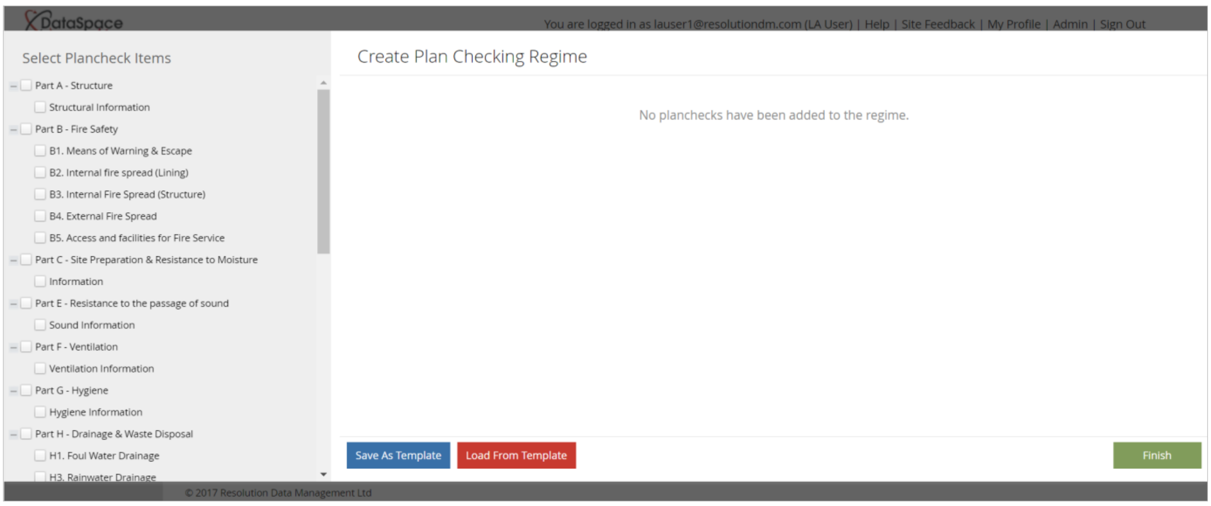
When you first visit an application's PlanCheck tab, you'll notice the check-list is empty. This is because you need to first create your check-list, choosing which checks you require.



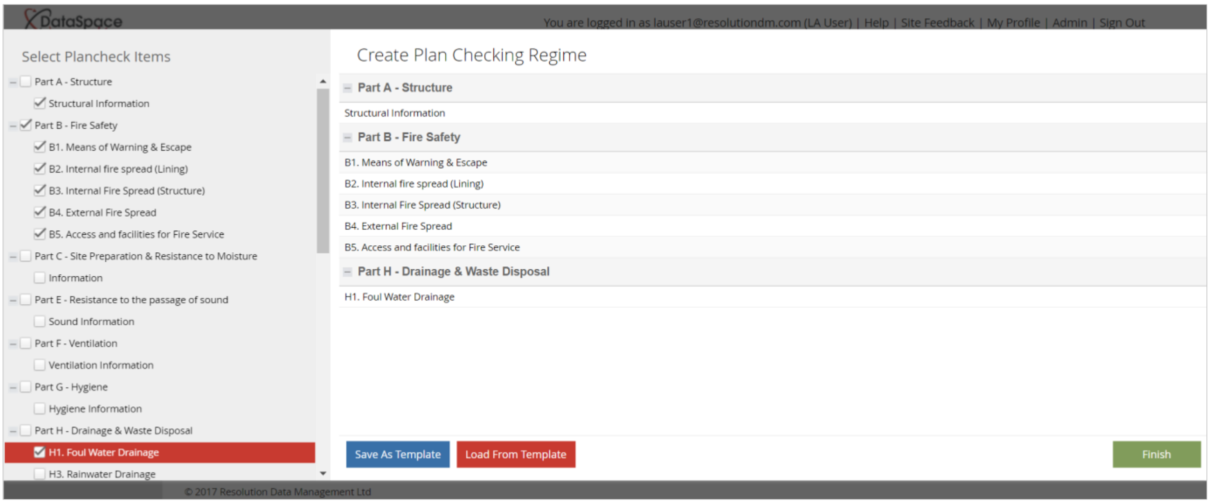
To create your check-list click the **'Regime'** button on your toolbar.



The **'Create Plan Checking Regime'** window will open on your screen.



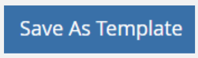
You can add an item to your check-list in two ways. You can tick each item individually, picking and choosing which items you wish to add. Alternatively and to save time, clicking the primary box ie Part A, Part B, Part C labelled boxes, will automatically select and add every item listed under that section.



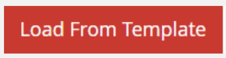
Once you've added all the items you desire to add, clicking **'Finish'** will close the window and apply them to your list.

Before you do this you may wish to create a template of your checks:

Tip: Check-List Templates



You may wish to save your selection as a template. This will be useful if you intend to use the same checks frequently. By clicking the **'Save as template'** button you will be asked to give your template a name. You can make as many templates as you with different sets of checks.



This means that the next time you click the **'Regime'** button to create a check-list for an application, you can simply click the **'Load from Template'** button and choose the relevant sets of checks from your saved templates, rather than having to add them every time.

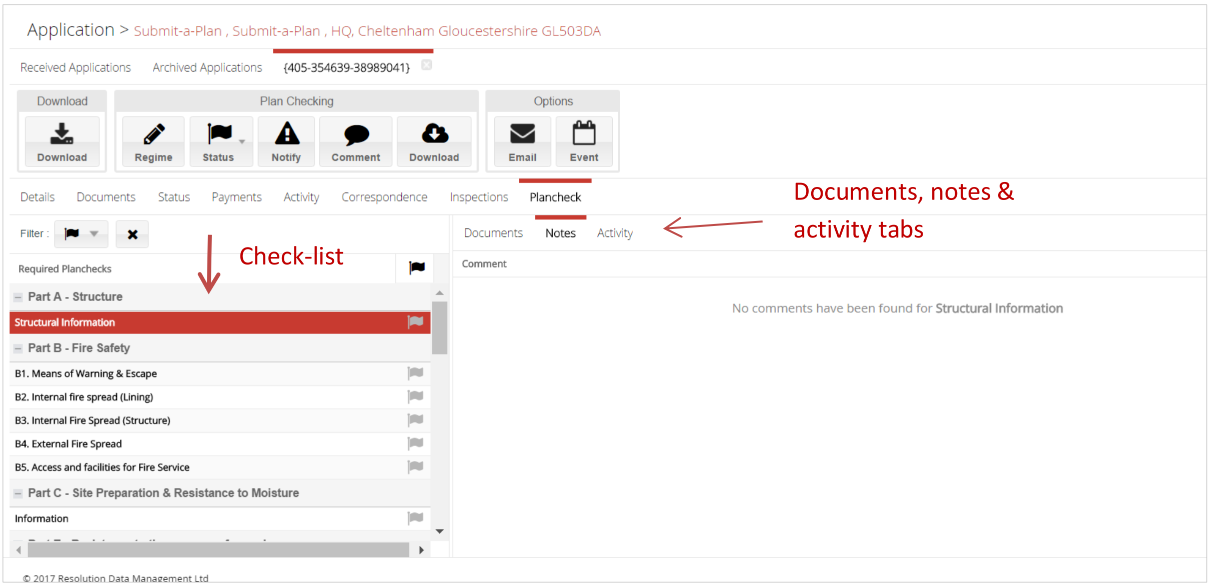
Managing Checks & Templates in the User Admin Tool

You can use our new User Admin Tool to setup, edit, or remove your PlanCheck checks or to remove your PlanCheck templates, learn how in our Admin Tool Guide downloadable from the DSLive Help Hub [guide-sheets page here>]

Back in the application's Plan-Check tab, you will see the checks you selected have now been added to the check-list (See below). *(For the purposes of this guide we have added all checks to the list).*

As you work your way through the check-list, any statuses, notes, requests for information or document uploads will be recorded under the three small tabs labelled '**documents', 'notes'** and **'activity'**.

To view such items associated to a check, simply click on the check in the check-list to select it and the information will become visible under its relevant tab. To switch between tabs, simply click on the tab title.

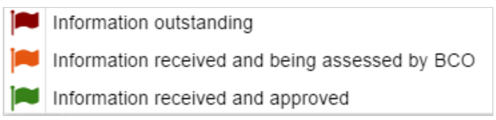


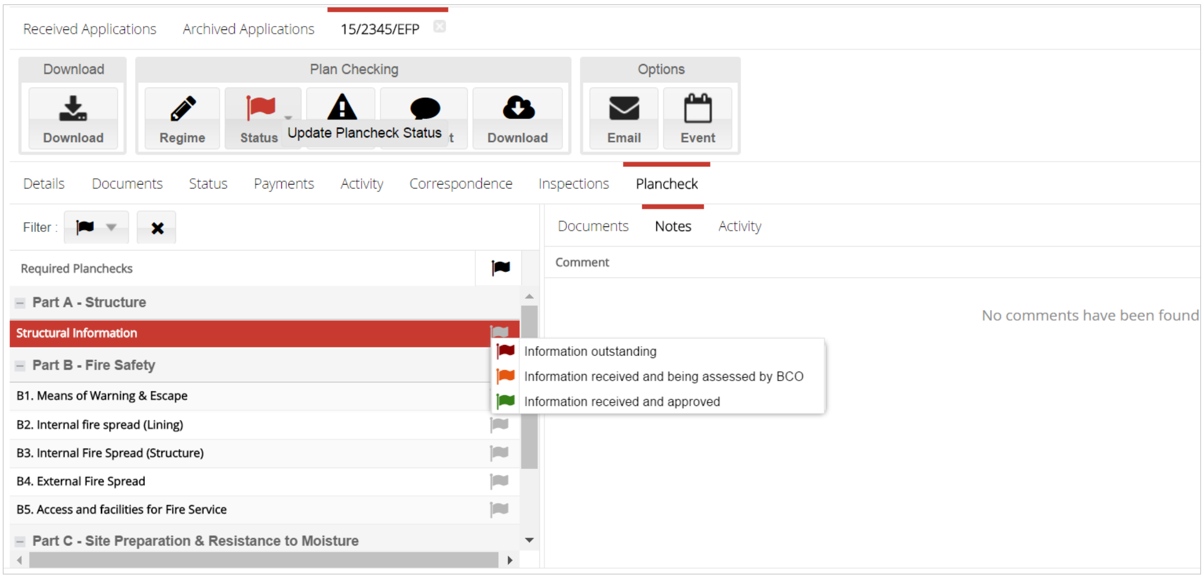
Section B: Changing the Status of a Check

There are two ways to change the status of a check, the first is to simply click on the flag icon next to it and select the desired status from the list (see below).

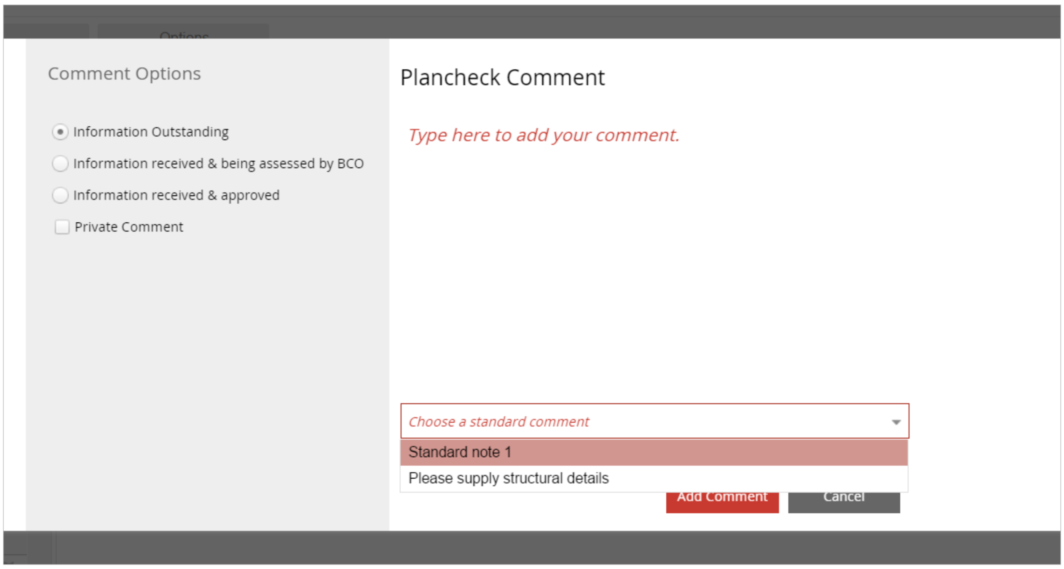
The second is to click on the required check in the list and select the **'Status'** button on the toolbar 

Both options will open the status window and at any time you can use them to return and change the status of your check, as we will see further on.





When you select a status in the list, the below **'Status'** window will open.



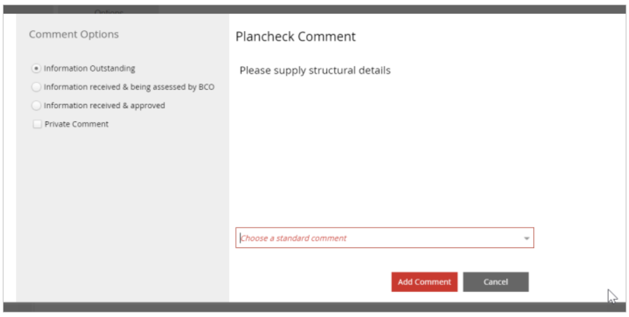
Here the status you have selected is shown to the right and if you need to you can change the status here if you wish by simply clicking on one to tick its box.

On the right you will be asked to add a comment. You can do this by typing a comment into the space provided or choosing a standard comment from the drop down list. You can also choose to keep a comment private from the applicant/agent.

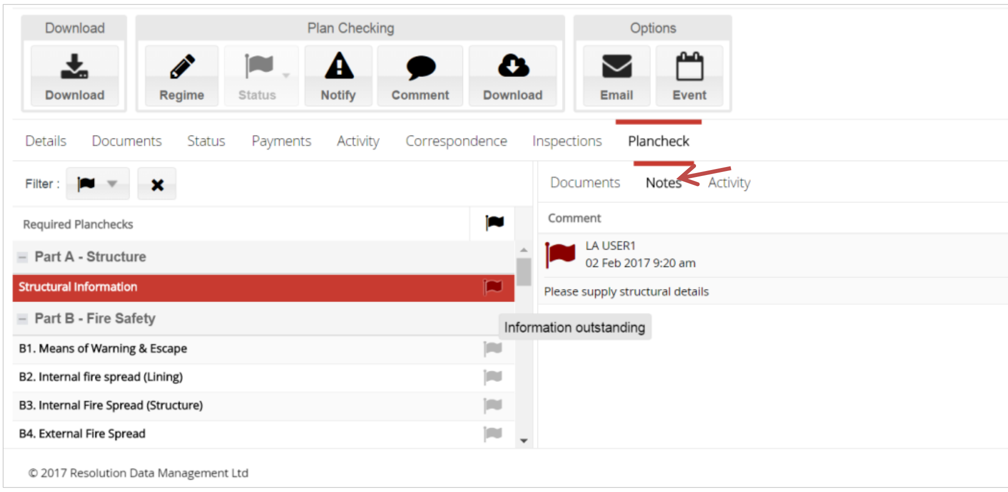
Tip: Setting up and managing Standard Comments

Standard comments can be setup and edited for each authority individually and you can do this in your User Admin Tool. Here you will be able to add, edit and remove standard comments as required. Find out how to do this in our Admin Tool Guide downloadable from the DSLive Help Hub guide-sheets page here>

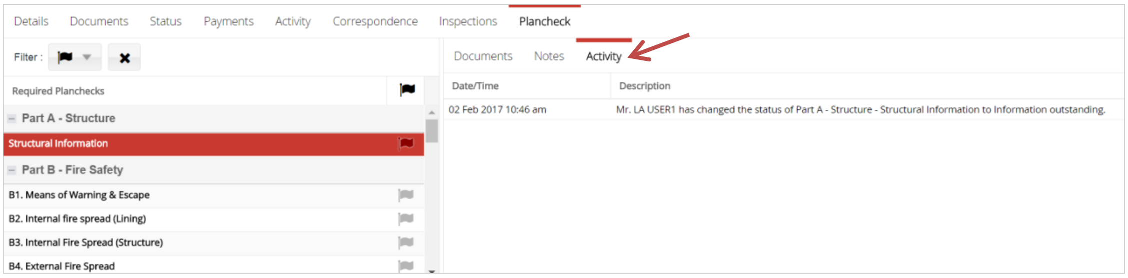
Once you have typed or selected your comment click **'Add Comment'** to complete.



Back in the PlanCheck tab, if you click on the check you added a status to, the coloured status flag and comment will now appear in the **'Notes'** section beside it, along with the time, date and name of the person who added it. It will also be logged in the **'Activity'** tab which lists all authority and applicant/agent activity for the entire check-list.



Notes Tab

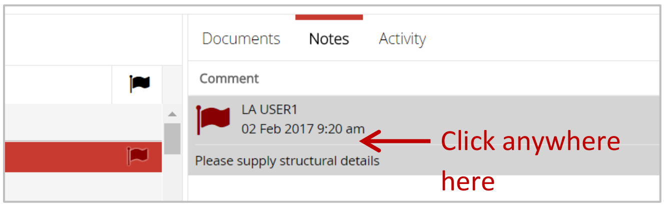


Activity Tab

Eventually when you click the **'Notify'** button, DSLive will send an email or text message to the applicant/agent alerting them to the fact that there is information outstanding and an action required of them. They can then login to their Submit-a-Plan account to see what comments the plan-checker has added and respond or upload any documents as requested. *(we will look at this later in the guide).*

Updating the status of a check

At any time you can return to the status window to change the status of a check by clicking on the comment in the **'Notes'** section (see below).

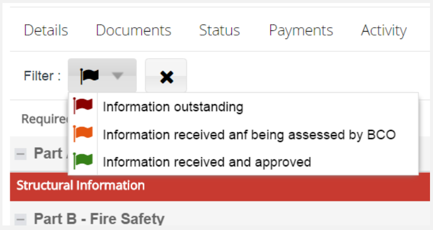


When the applicant/agent uploads the information you require you can update the status to **'Information received & being assessed by BCO'** and finally when you are satisfied you can change it to **'Information received & approved'.**

Whenever you change the status, the relevant coloured flag will change with it, making it easy to see from the checklist which ones are approved and which ones still need attention.

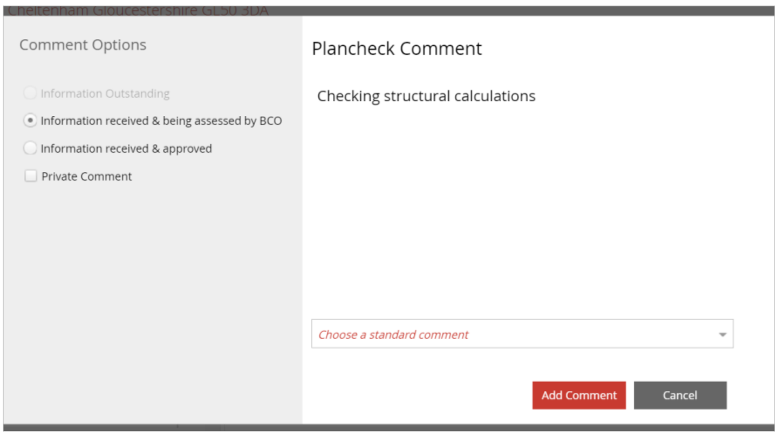
Tip: Flag Filter

You can also the **'Flag Filter'** to easily view the checks that have been approved or those that still need attention. Remember to clear the filter after by pressing the **X**



Click **'Add Comment'** to apply your chosen status.

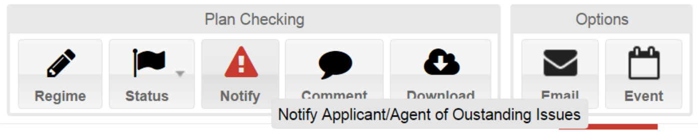
Each status change will be logged in the **'Notes'** tab as well as the **'Activity'** tab.



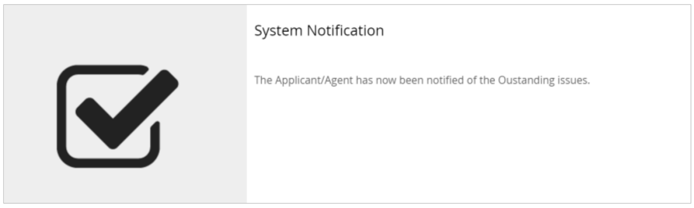
Section C: Requesting Information from the applicant/agent

You may reach a check in your check-list where the information you have is not satisfactory. Earlier we showed you how to change the status of a check to **'Information Outstanding'** and how to add a comment that more structural details were needed. Now we will show you how to notify the applicant/agent of your request.

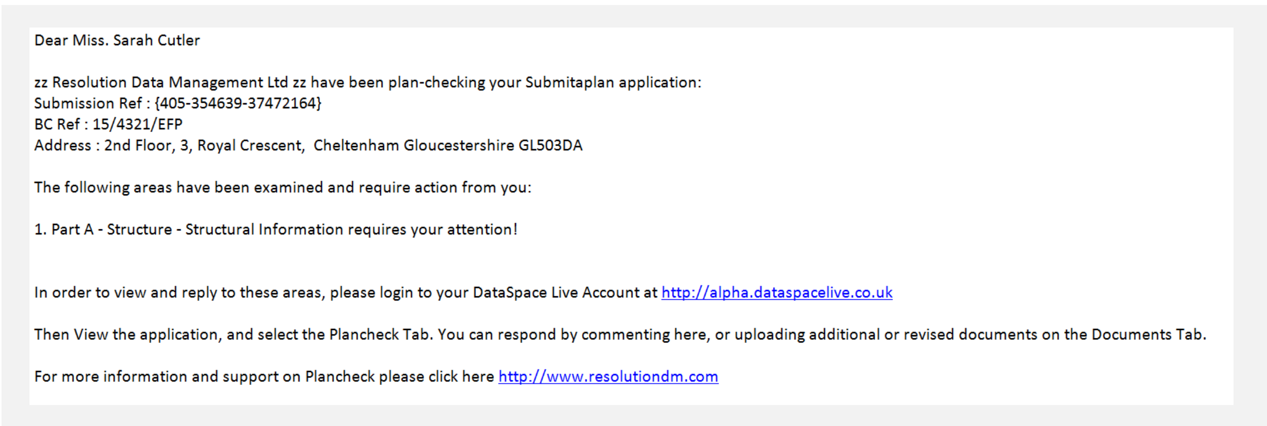
To do this you simply need to click on the **'Notify'** button on your PlanCheck toolbar.



You will receive a message telling you that the applicant or agent has now been notified of the outstanding issues. Meanwhile the applicant or agent will receive an email and/or text message from DSLive.



The email or text the applicant/agent receives will notify them that their issues and in which section:



Dear Miss. Sarah Cutler

zz Resolution Data Management Ltd zz have been plan-checking your Submitaplan application:
Submission Ref : {405-354639-37472164}
BC Ref : 15/4321/EFP
Address : 2nd Floor, 3, Royal Crescent, Cheltenham Gloucestershire GL503DA

The following areas have been examined and require action from you:

1. Part A - Structure - Structural Information requires your attention!

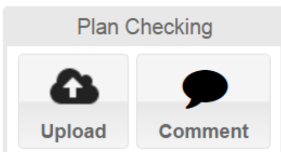
In order to view and reply to these areas, please login to your DataSpace Live Account at http://alpha.dataspacelive.co.uk

Then View the application, and select the Plancheck Tab. You can respond by commenting here, or uploading additional or revised documents on the Documents Tab.

For more information and support on Plancheck please click here http://www.resolutiondm.com

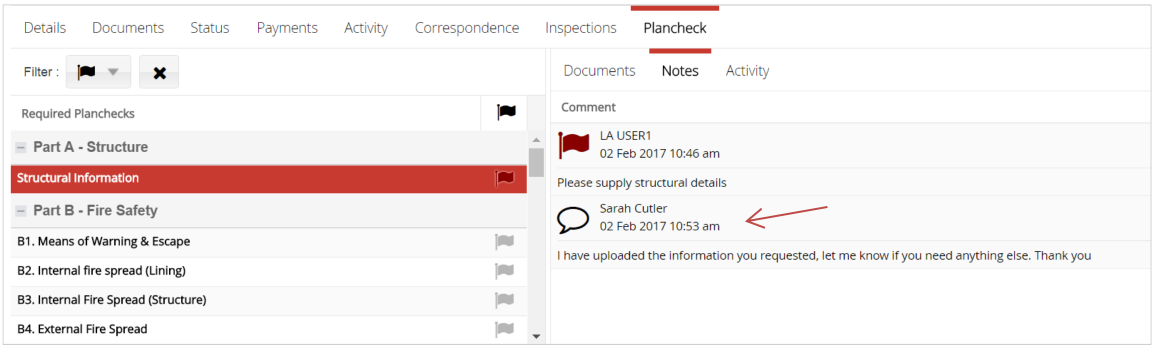
In their own PlanCheck tab they can see the status and comments and requests that have been made.

They also have the tools to upload documents and send you a comment.

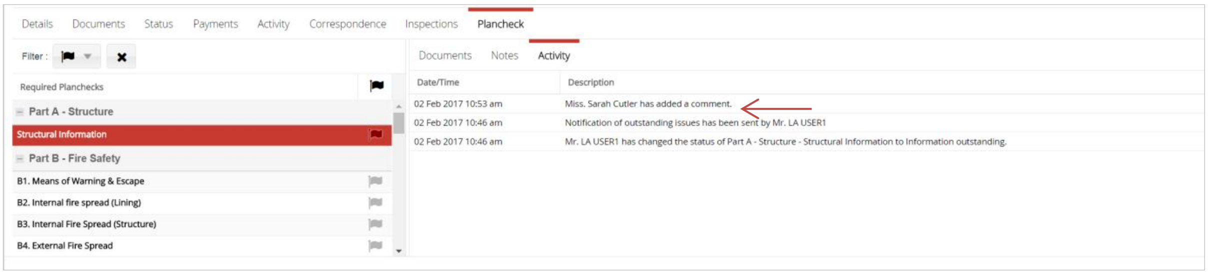


Back in the authority's account:

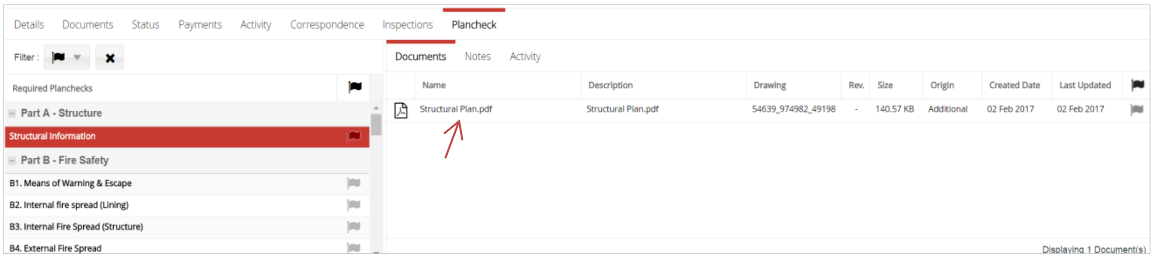
To view the comment the applicant/agent added click on the relevant check to make it appear under the **'Notes'** tab.



Their activity is also recorded with all other plan-checking activity under the PlanCheck **'Activity'** tab.



Finally, any documents the applicant/agent uploads will appear in the **'Documents'** tab within the **PlanCheck**.



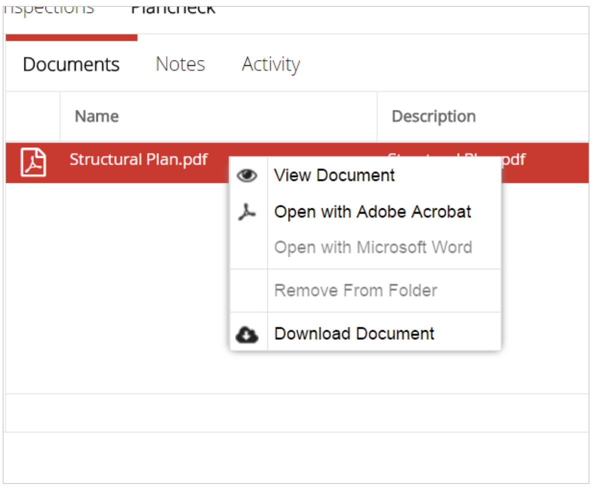
Tip: Uploaded Documents

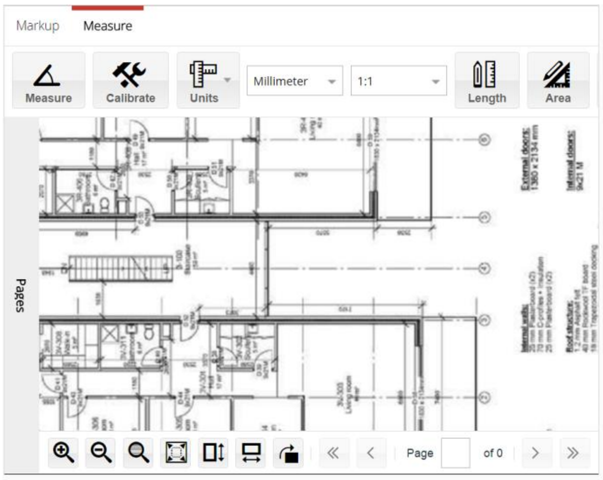
Just like with the uploading of any other additional document to an application - they will also appear under the application's main 'documents' tab, including in the 'additional documents' folder, and the uploading activity recorded in the application's main 'activity' tab.

Also just like additional documents you will also be notified by email when a new document or comment is added and directed to the correct application PlanCheck tab by a link.

To view a document an applicant/agent has uploaded simply double-click on the document in the list or right-click on it and select **'View Document'**. This will open the document in our DSLive Document Viewer which comes equipped with a range of advanced measuring, mark-up and redlining tools.

(If you prefer to view the document as a PDF, simply right-click and select **'Open wide Adobe'** instead.)





Document Viewer with tools

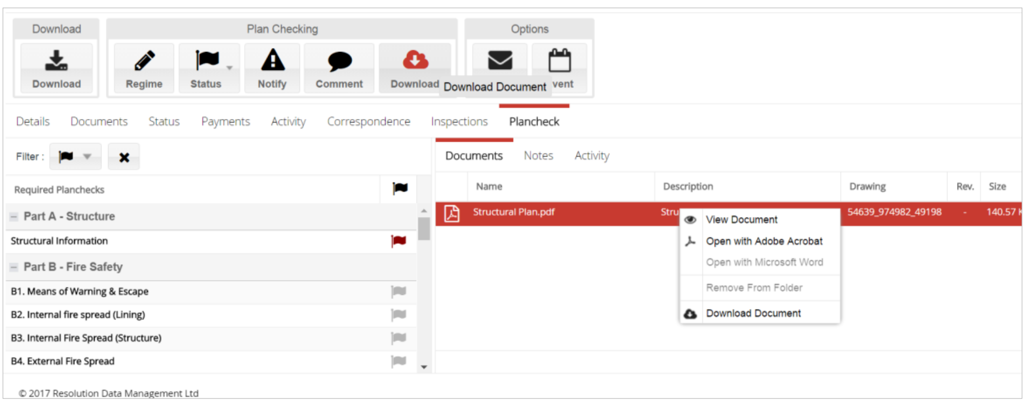
Tip: Document Viewer Guide

You can download a guide for using our measuring and markup tools here: [Document Viewer Guide>]() or from our list of [guidesheets>]()

You can also download a document.

To do this select the document in the list and click on the **'Download'** button on your tool-bar or right-click on it and select **'Download'** from the drop-down list.

The document will be downloaded to your **'Downloads'** folder on your pc.

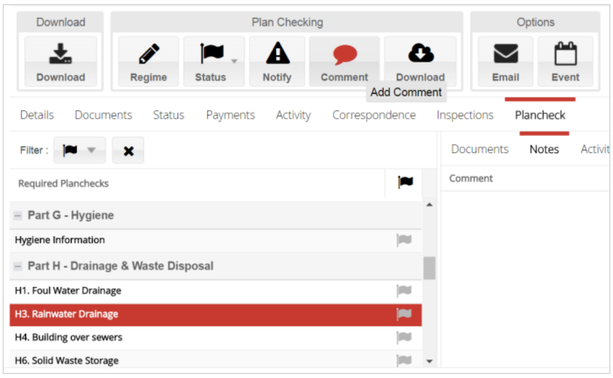


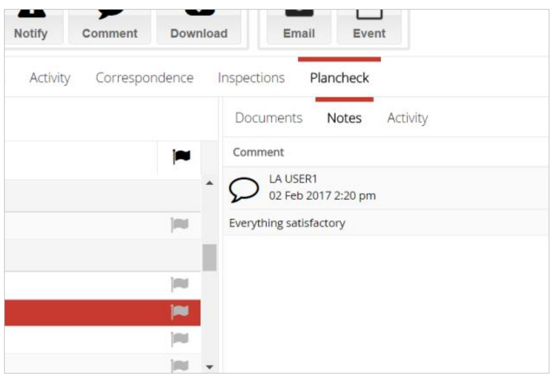
As suggested earlier, when the applicant/agent uploads the information you require you can update the status to '**Information received & being assessed by BCO'** and finally when you are satisfied you can change it to **'Information received & approved'.**

Section D: Adding other Comments

We already showed you how to add comments when changing the status of a check, but you can also add general comments to a check. To do this simply select the check in the list and click the **'Comment'** button on the tool-bar.

A simple comment box will open where you can type your text before clicking **'Add Comment'**. The comment will appear in the **'Notes'** tab when you click on the check in the list. You can also choose to make the comment private if you wish it to be seen only by your authority and not the applicant/agent.





Section E: Notify the completion of Plan-Checking

Section coming soon.

The DataSpace Live Guide

Help & Support:
helpdesk@resolutiondm.com
01242-260505

Find other guides and videos our DSLive Help Hub:
http://www.resolutiondm.com/dslivehelphub

RESOLUTION
www.resolutiondm.com