

# Standard Forms

Online document creation in DSLive

Draft Manual

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## Introduction

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**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.**

Our standard forms facility enables you to create a range of documents online within an application in DSLive itself, such as initial notices, approval certificates, inspection reports and standard letters which can then be shared with an applicant or agent or other contacts.

By pressing the new **'Create Document'** button in the **'Documents'** tab of an application you'll be able to select the document you wish to create from a list and a standard template form will open on your screen.

When your new document template opens you will find various fields where the information in your document will appear. Some of these fields are pre-populating fields ie. information the system can pull and merge from DSLive automatically ie – application submission IDs, applicant or agent name, work locations etc etc. Other fields will be editable which you can type your information or comments into. You'll then be able to save the document and share it with the applicant or agent.

### **Creating and Managing your Document Templates**

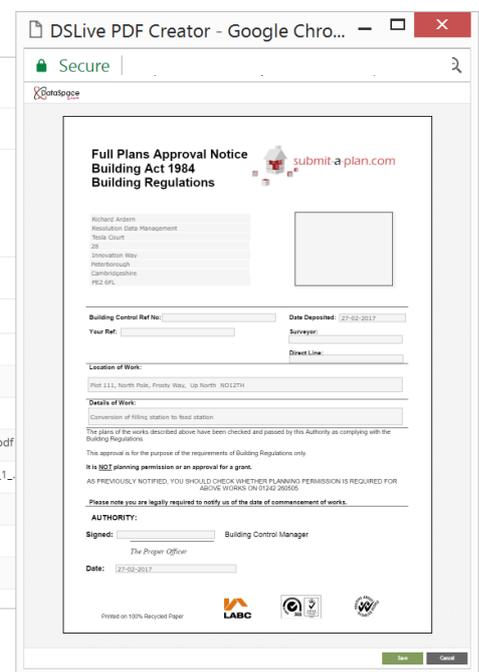
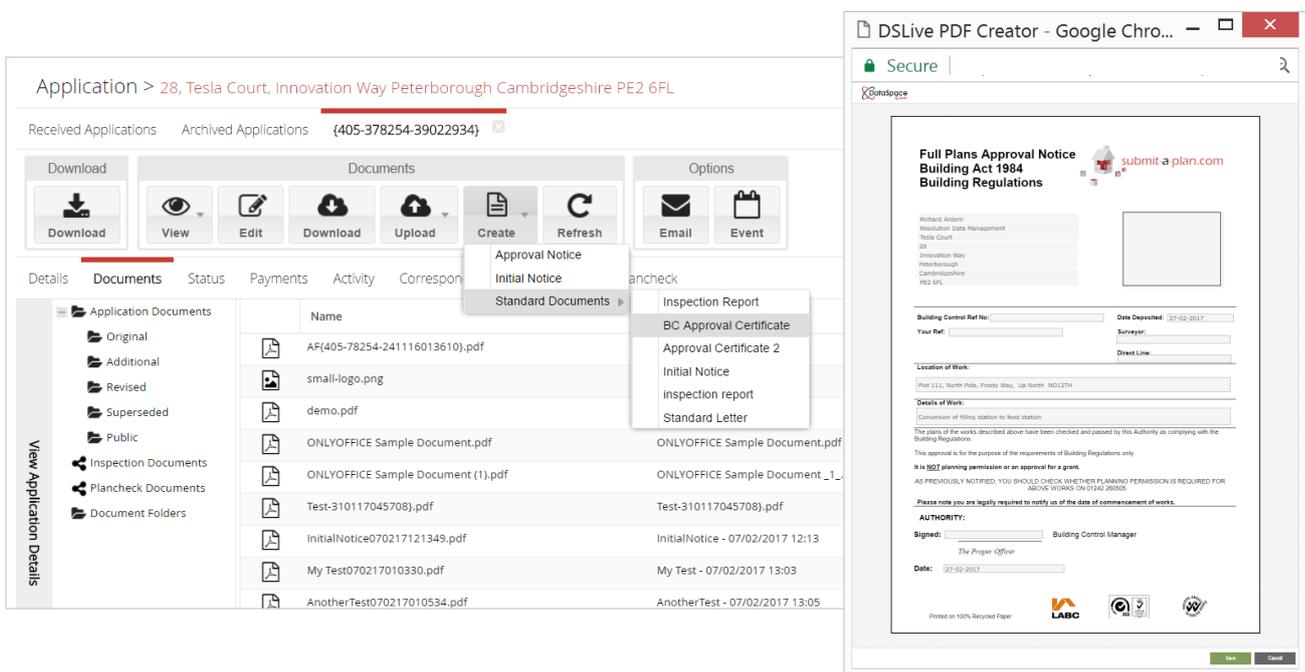
The templates for certificates and other such documents can be created and managed by each authority individually meaning that you can decide how you would like your different document templates to look and what information you would like them to contain. You can also have multiple templates for a certain type of certificate or other document with slightly varied responses to suit your needs. Templates are created using a PDF Creator Programme which enables you to add both pre-populating and editable fields and which you can return to at any time to edit. Once ready templates are uploaded to DSLive enabling you to then complete your certificates or other documents online in the application. Templates are uploaded and managed here in the User Admin Tool under the **'Standard Forms'** tab.

To demonstrate we will be using a program called Nuance Power PDF which enables you to create document templates but other similar programmes can also be used.

## Section A: What a standard form looks like in DSLive

First we will take a look at what a certificate or other document will look like in DSLive. You'll find the **'Create Document'** button under an application's **'Documents'** tab.

When you click the button you will find a drop-down list of different **'Standard Documents'**. For this guide we will demonstrate an **Approval Certificate**. When you click on **'Approval Certificate'** in the list a document will open on your screen like below in the DSLive Document Creator.

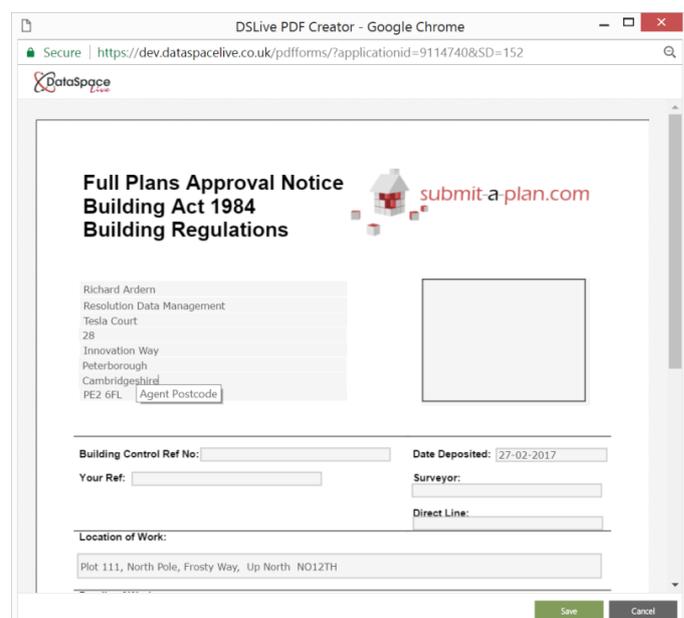


**You'll notice the different fields in the document.**

Some are pre-populating, pulling information from DSLive itself such as the work location, submission ID number and the date on which you are creating the document. You can see these details already visible in the fields.

You will also see empty fields that are editable for you to enter information. These are the fields you can add and arrange as you wish in your PDF Creator programme. When you hover over the field with your cursor, the name of the field appears.

**These are all fields that you need to add to your template using a PDF Creator.**



## Section B: Creating Templates

### 1. Introduction to Creating Templates

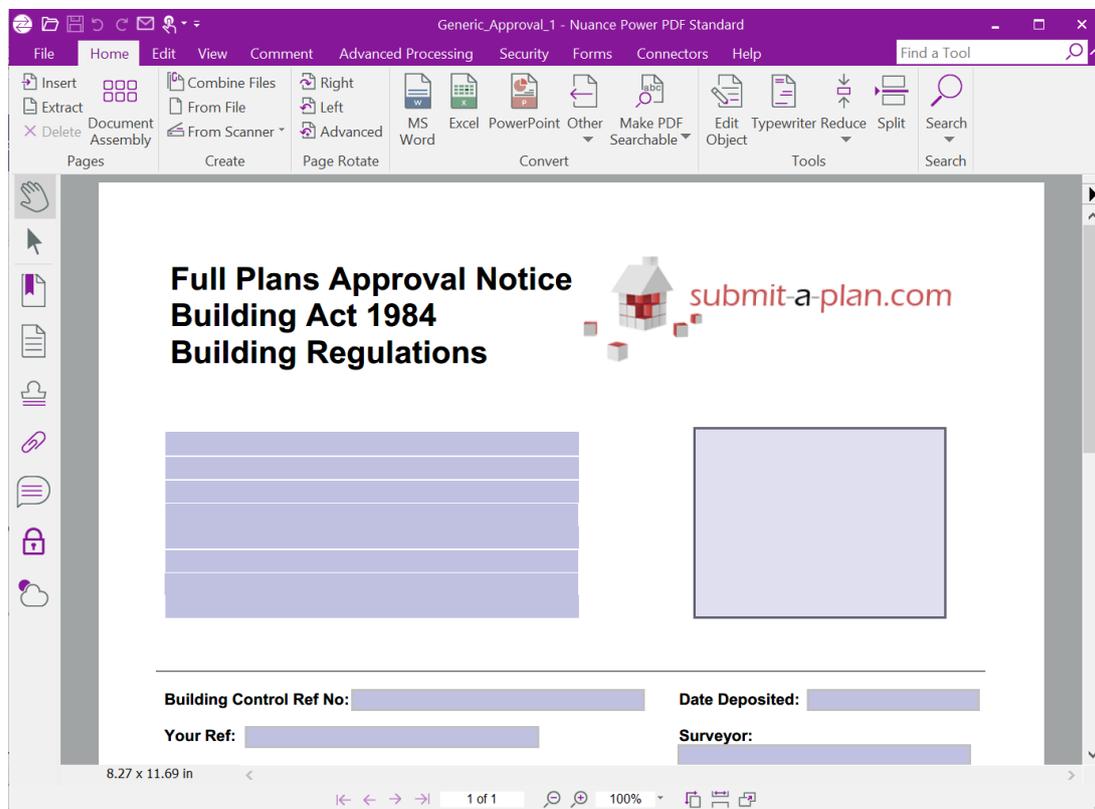
The first thing you will need to do is create your document templates. You can either create a template from scratch or edit any existing template you may have in your PDF Creator programme.

In your programme you should be able to add a main document title and your authority's logo as well as adding text titles for your different fields.

If you are using an existing template where you have already added these objects, you should be able to edit, delete or move them around when you open the template in your PDF Creator. If you already have existing text boxes for entering information, you should be able to delete these to make way for the pre-populating or editable fields you will add.

*Tip: If you wish to create or edit your templates for you, we can do this at a small charge.*

Below is an example of how a template will look when open in a PDF Creator programme:

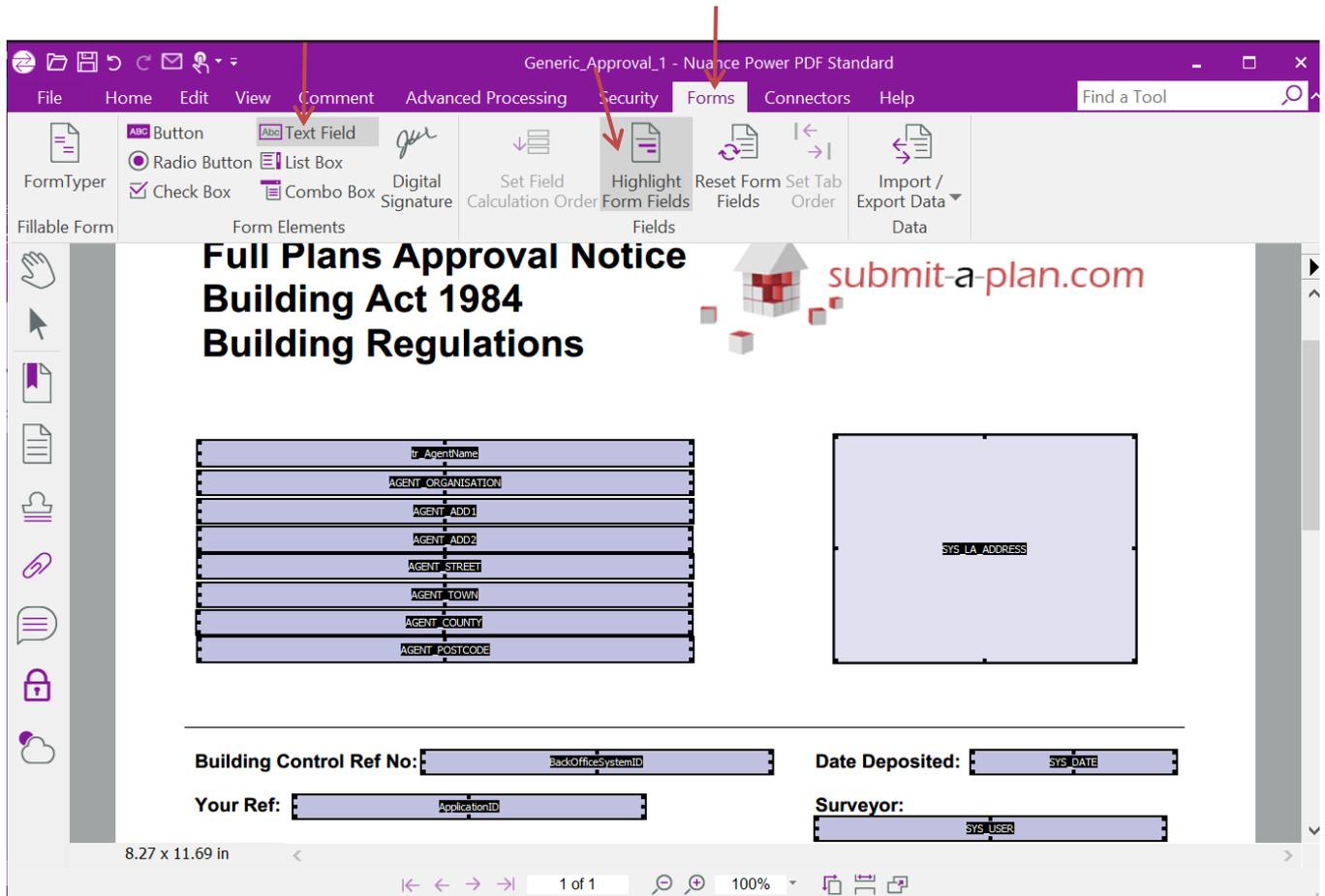


In your programme you should have something similar to a **'Forms'** tab on the toolbar which you can use to add your fields (see below image).



In the programme we are using you can easily see the fields that you add by pressing the **'Highlight Form Fields'** button on the toolbar. This highlights your fields in purple.

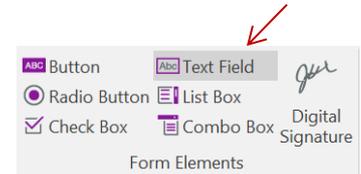
In addition when you click the **'Add Text Field'** button, it makes the titles of the fields visible.



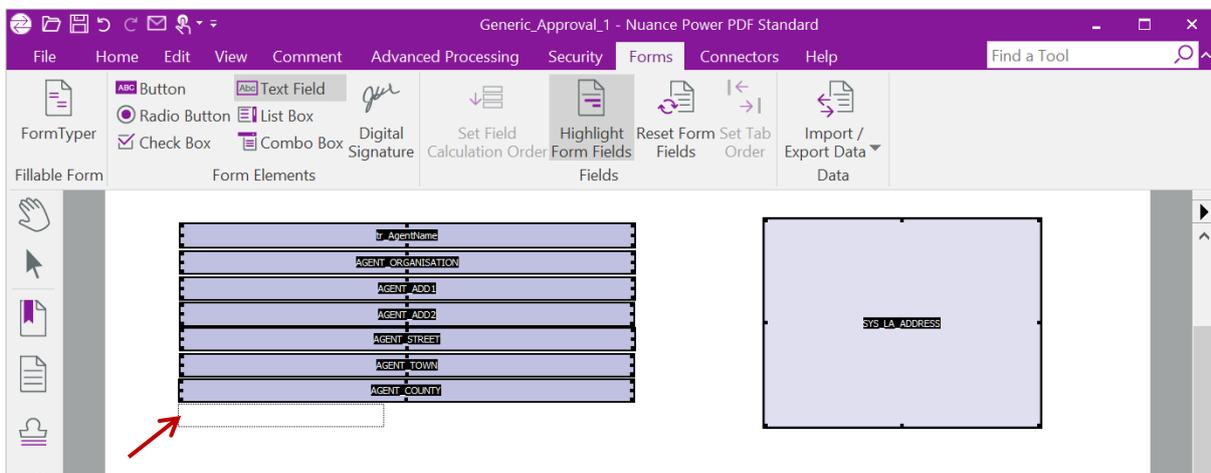
## 2. Adding a Field

### Adding a Field

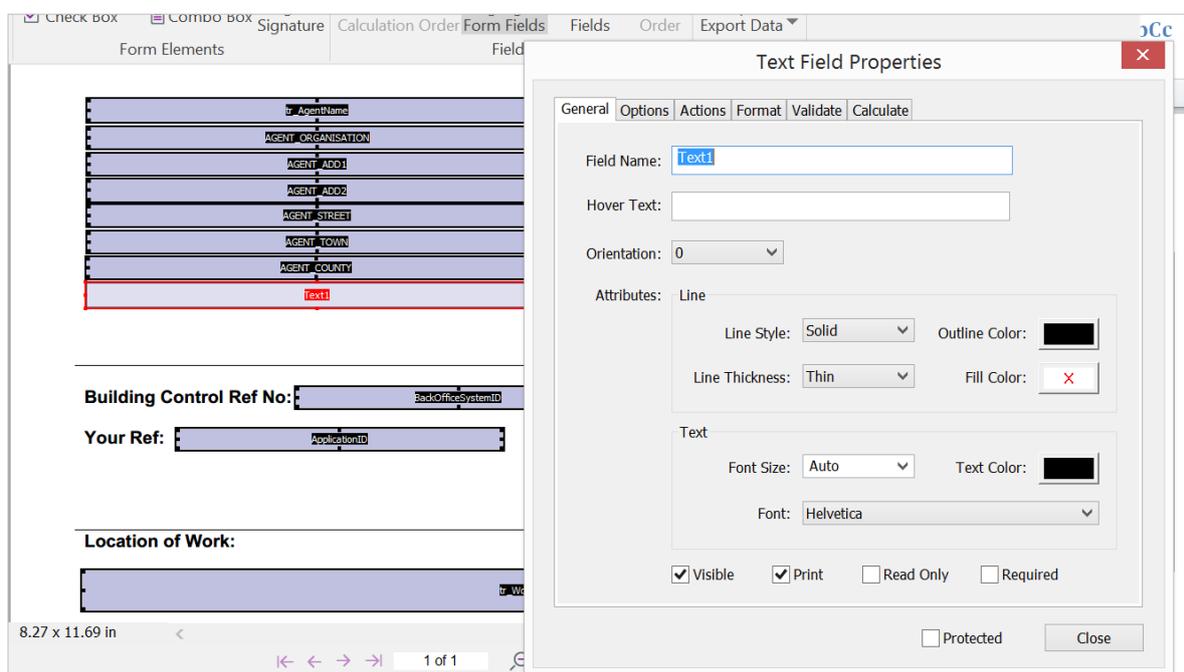
In your PDF Creator Programme, you should have something similar to an **'Add Text Field'** button. (Note that there should be other types of fields to choose from such a list field if you wish to use these)



Once you have clicked the **'Add Text Field'** button, you should now see a cross appear when you hover over the document. When you click on the document where you wish to add your field and drag your mouse, you will be able to draw a text field. See Below.



Once you have drawn your field box and let go of your mouse button, your new field will appear highlighted in a red box and a **'Field Properties'** window will open asking you to name and select any settings for your field (see image below).



### 3. Text Field Properties

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#### Field Name Box

The **'Field Name Box'** is what will determine if your field will be a pre-populating field eg. will automatically pull the information from DSLive and enter it for you such as submission ID, work location, agent name etc, or an editable field, leaving the field blank for you to enter information as you need.

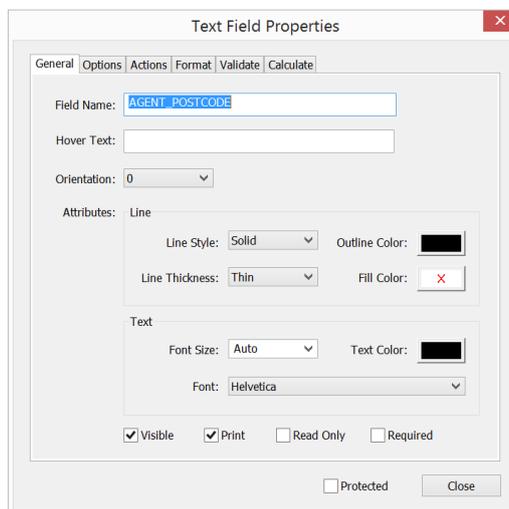
#### Making a Pre-populating Field.

To make a field pre-populating field (eg. will automatically pull the information from DSLive and enter it into your document for you), you will need to enter the name of that specific field in DSLive here into the Field Name Box. ie. AGENT\_POSTCODE.

We will supply you with an excel list of all the fields in applications and inspections etc plus other 'system' fields such as local authority address, today's date or the name of the surveyor signing the certificate.

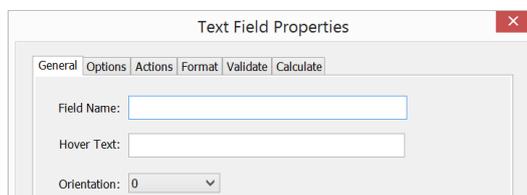
You will then be able to simply copy and paste them here in the **'Field Name'** box.

Later on when you have uploaded your finished template to DSLive and go to create an 'Approval Notice' in an application, the system will match the names in the two fields ie AGENT\_POSTCODE and enter the postcode into the certificate for you.



#### Making an Editable Field

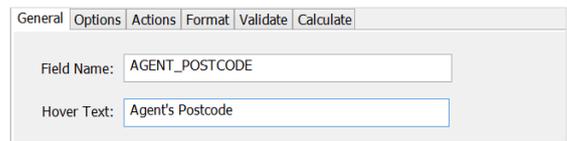
If you wish a field to be editable when creating a document in DSLive, you can simply leave the 'Field Name' box here blank and in DSLive it will also be blank and you will be able to type into it rather than it trying to find a match.



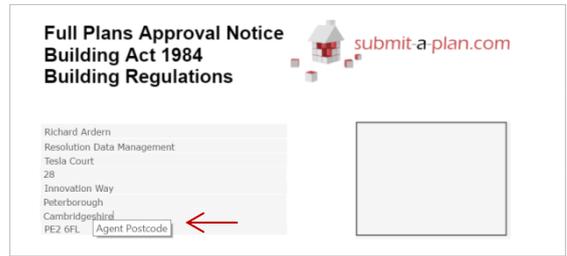
## Hover Text

Just below the **'field name'** box you'll find a **'hover text'** box.

Here you can label your fields, even for an editable field, and when you hover over a field in DSLive when creating a document, the label will appear to remind you what the different fields are for.



A screenshot of a software interface showing two input fields. The first is labeled 'Field Name:' and contains the text 'AGENT\_POSTCODE'. The second is labeled 'Hover Text:' and contains the text 'Agent's Postcode'.

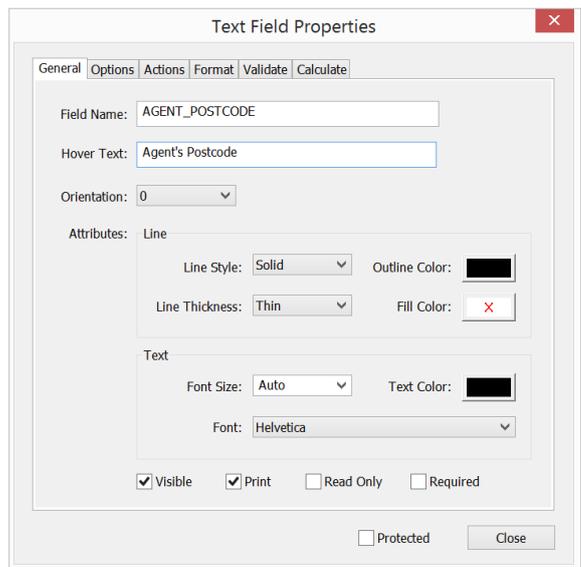


A screenshot of a document template. At the top, it says 'Full Plans Approval Notice Building Act 1984 Building Regulations' with a logo and the website 'submit-a-plan.com'. Below this is a list of address details: 'Richard Ardern', 'Resolution Data Management', 'Tesla Court', '28', 'Innovation Way', 'Peterborough', 'Cambridgeshire', 'PE2 6FL'. A red arrow points to a small box labeled 'Agent Postcode'.

## Field Font, Style & Other Settings

Further down in the properties window you will have other settings to choose from such as the font of the text or whether you would like your field to have a border outline or be invisible.

There are also tabs along the top of the properties box where you can find other settings for changing the field from a text field to a number, currency, date or time field or even calculations.



A screenshot of a 'Text Field Properties' dialog box. It has tabs for 'General', 'Options', 'Actions', 'Format', 'Validate', and 'Calculate'. The 'General' tab is active. It contains the same 'Field Name' and 'Hover Text' fields as the previous screenshot. Below these are 'Orientation' (set to 0) and 'Attributes' for the 'Line' (Line Style: Solid, Line Thickness: Thin, Outline Color: black, Fill Color: white with a red X) and 'Text' (Font Size: Auto, Font: Helvetica, Text Color: black). At the bottom, there are checkboxes for 'Visible' (checked), 'Print' (checked), 'Read Only' (unchecked), and 'Required' (unchecked). There is also a 'Protected' checkbox and a 'Close' button.

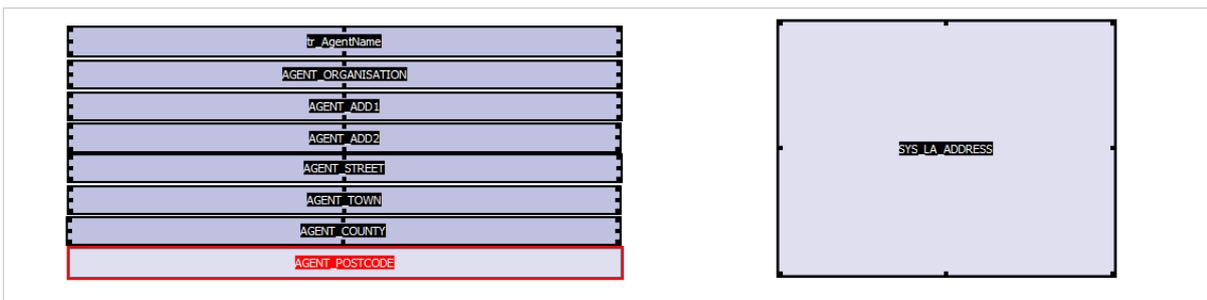
Click **'Close'** to apply your settings

Close

At any time you can reopen a field's properties window to change its settings by double-clicking on the field itself or right-clicking on it and selecting **'Properties'**.

Back in the template, you'll find the name has now been entered into the field.

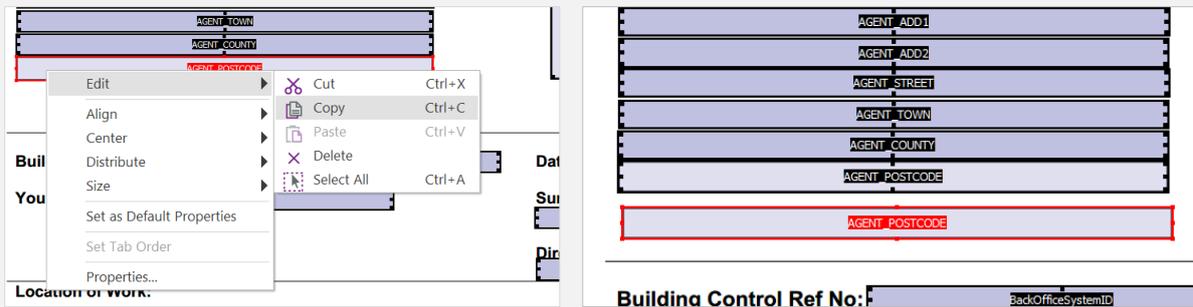
You change the size of the field using the adjusters at the ends of its box or move it by dragging the box across the page.



A screenshot of a document template showing a vertical list of fields. The fields are: 'tr AgentName', 'AGENT\_ORGANISATION', 'AGENT\_ADD1', 'AGENT\_ADD2', 'AGENT\_STREET', 'AGENT\_TOWN', 'AGENT\_COUNTRY', and 'AGENT\_POSTCODE'. The 'AGENT\_POSTCODE' field is highlighted with a red border.

### Tip: Copying and Pasting Fields

You can also create a field by right-clicking on an existing field and selecting 'copy' then 'paste'. The copied field will appear on the template and you can drag it to the desired place. You can then double-click on the field to open its properties window and changed its field name.



## 4. Adding or Editing Other Text and Objects

As well as adding fields you can also add normal text to make up the main part of your document and edit any objects already in the document when you opened it in your PDF Creator Programme ie your council logo or other existing document contents.

If you are using an existing template where these objects were added previously, you should be able to edit, delete or move them around when you open the template in your PDF Creator. If you already have existing text boxes for entering information, you can delete these to make way for the pre-populating or editable fields you will add.

### Adding Text

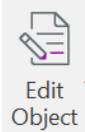


In Power PDF which we are using for our demonstration, you can add text to your document by going to the 'Edit' tab on the main toolbar and selecting the 'Typewriter' button.

Simply click with your mouse on the place where you wish to add text and when the cursor appears on the page you can start typing.



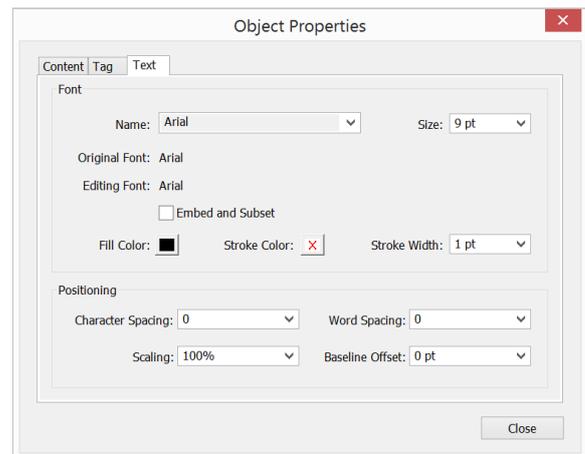
## Editing Text



You can then edit the text item you've added or that was already in your document.

Click on the **'Edit Object'** button on the tool bar then click on the item in the document to select it. A blue **'edit'** box will appear around the item. 

You can now edit the text, copy it, drag it to another location or right-click and choose to delete it. You also click on the **'Properties'** button on the tool bar to change the text size and font.

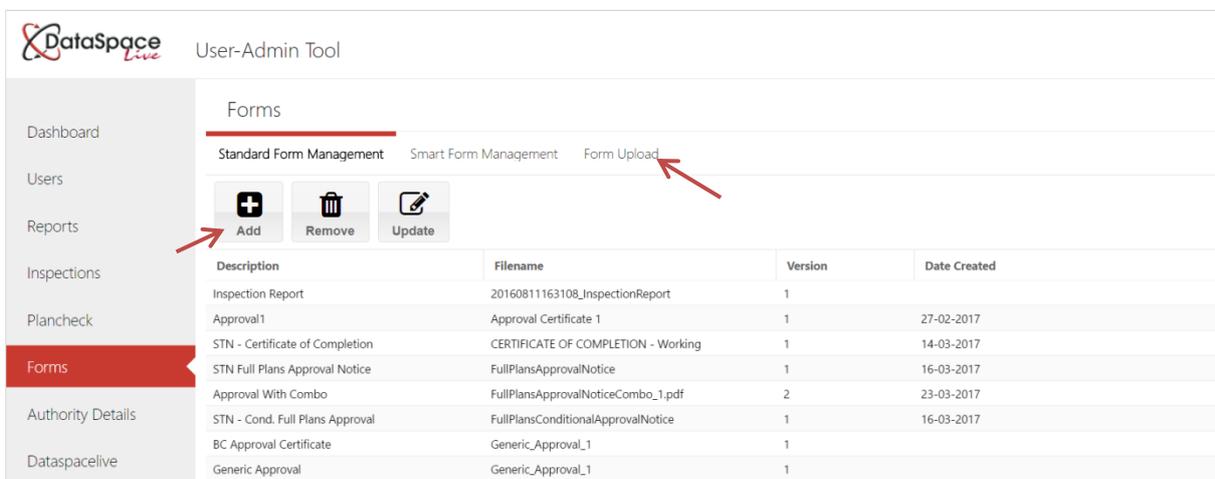


## Section C: Uploading your template to DSLive

Once you have added all the fields and information to your document template you are ready to upload it to DSLive.

First save the document you've created in your PDF Creator Programme to your computer. You will then need to login into DSLive and click on the **'Admin Tool'** link at the top right-hand corner of your screen.

**Once in the admin tool you will need to select the 'Forms' tab. Here will be listed any templates you upload to DSLive.**



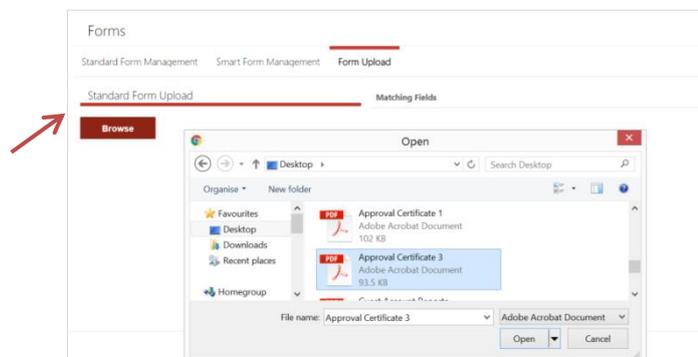
The screenshot shows the DataSpace Live User-Admin Tool interface. The 'Forms' tab is selected in the left-hand navigation menu. The main content area displays a table of existing forms and a toolbar with 'Add', 'Remove', and 'Update' buttons. A red arrow points to the 'Form Upload' tab in the top navigation bar, and another red arrow points to the 'Add' button in the toolbar.

Description	Filename	Version	Date Created
Inspection Report	20160811163108_InspectionReport	1	
Approval1	Approval Certificate 1	1	27-02-2017
STN - Certificate of Completion	CERTIFICATE OF COMPLETION - Working	1	14-03-2017
STN Full Plans Approval Notice	FullPlansApprovalNotice	1	16-03-2017
Approval With Combo	FullPlansApprovalNoticeCombo_1.pdf	2	23-03-2017
STN - Cond. Full Plans Approval	FullPlansConditionalApprovalNotice	1	16-03-2017
BC Approval Certificate	Generic_Approval_1	1	
Generic Approval	Generic_Approval_1	1	

### 1. How to upload the template

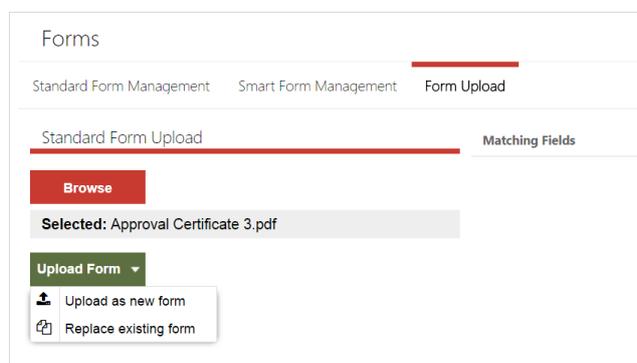
To add your document you can either click on the **'Add'** button on the toolbar or go to the **'Form Upload'** tab. 

Use the **'Browse'** button that appears to select your saved document template from your computer.

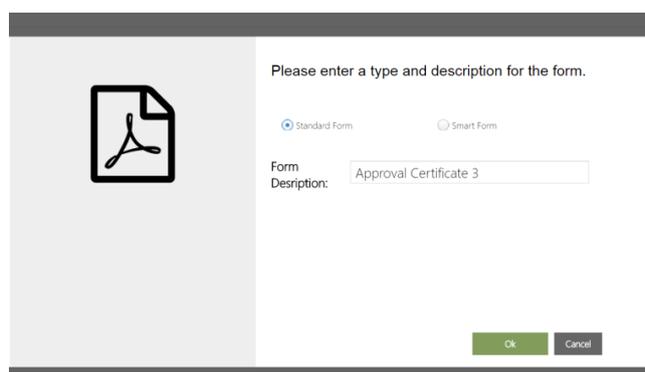


The screenshot shows the 'Form Upload' tab selected in the DataSpace Live interface. A red arrow points to the 'Browse' button. An 'Open' file dialog box is open, showing a list of files on the Desktop, including 'Approval Certificate 1', 'Approval Certificate 2', and 'Approval Certificate 3'. The 'Approval Certificate 3' file is selected, and the 'File name' field contains 'Approval Certificate 3'.

You will then need to choose whether you want to upload your document as a new template or replace an existing one.



You will need to select **'Standard Form'** as its type and add a further description if you wish to (ie 'standard approval', 'conditional approval', 'domestic projects' etc) to differentiate your different templates from one another,

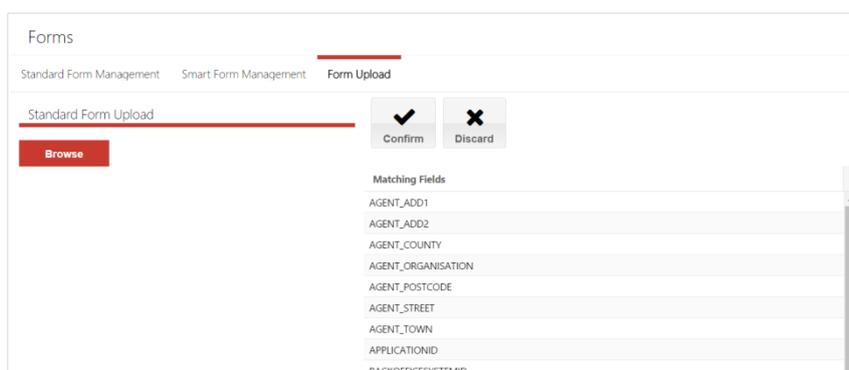


## 2. Reviewing the Fields

Once you click **'Ok'** you will then be asked to review and confirm the fields in your template.

You will be shown a list of all the matching fields the system has found (ie the system has successfully matched the fields in your template with their corresponding fields in DSLive).

Also listed are any fields in your template that the system hasn't been able to find a match for in DSLive (maybe because they were entered incorrectly or misspelt in the template).



If you are happy with the fields then click **'Confirm'** to keep your uploaded form. You can choose **'Discard'** to cancel the upload. If you choose **'Discard'** you can return to your PDF Creator programme, make any changes you need, then save and upload again.



You can now return to your list of templates under the **'Standard Form Management'** tab where you will find your new template has now been added.

Forms

Standard Form Management Smart Form Management Form Upload

Add Remove Update

Description	Filename	Version	Date Created
Inspection Report	20160811163108_InspectionReport	1	
Approval 1	Approval Certificate 1	1	27-02-2017
Approval Certificate 3	Approval Certificate 3.pdf	1	05-04-2017
STN - Certificate of Completion	CERTIFICATE OF COMPLETION - Working	1	14-03-2017
STN Full Plans Approval Notice	FullPlansApprovalNotice	1	16-03-2017
Approval With Combo	FullPlansApprovalNoticeCombo_1.pdf	2	23-03-2017

To rename a template simply click on the template in the list and click **'Update'** 

To remove a template simply click on the template in the list and click **'Remove'** 

**Tip:** To replace a template simply upload a new form and when asked if you wish to upload your document as a new template or replace an existing one choose the latter option and follow instructions.

## Section D: Creating Your Approval Certificate or other document in DSLive

Now that you've uploaded your template to DSLive, you are ready to create an Approval Certificate in an application online in DSLive.

### 1. Creating a Document in an Application

In DSLive open an application to its 'Documents' tab.

Click the 'Create' button on the tool bar, choose 'Standard Documents' and from the drop down list of different documents and listed will be the template you uploaded.



The screenshot shows the DSLive application interface for application 15/2234/EPPA. The 'Documents' tab is active, displaying a list of documents. The 'Create' button in the toolbar is clicked, opening a dropdown menu with 'Standard Documents' selected. A table of available document templates is visible on the right.

Name	Sht.	Rev.	Size	Origin	Created Date	Last Updated
STN - Certificate of Completion	1	A	54.97 KB	Original	17 Apr 2015	17 Apr 2015
STN Full Plans Approval Notice	1	-	140.57 KB	Original	17 Apr 2015	17 Apr 2015
Approval With Combo	1	-	601.96 KB	Additional	12 Jun 2015	12 Jun 2015
STN - Cond. Full Plans Approval	1	-	601.96 KB	Additional	12 Jun 2015	12 Jun 2015
BC Approval Certificate	1	-	601.96 KB	Additional	07 Aug 2015	07 Aug 2015
Generic Approval	1	A	140.57 KB	Revision	17 Apr 2015	03 Jun 2016
Approval Certificate 2	1	-	16.43 KB	Additional	07 Aug 2015	07 Aug 2015
CBS Final Certificate	1	-	16.43 KB	Additional	07 Aug 2015	07 Aug 2015
Initial Notice	1	A	140.57 KB	Revision	17 Apr 2015	03 Jun 2016
inspection report	1	A	140.57 KB	Revision	17 Apr 2015	03 Jun 2016
Intended Demolition	1	A	140.57 KB	Revision	17 Apr 2015	03 Jun 2016

The document will open in the DSLive Document Creator.

You will notice that the pre-populating fields have automatically pulled information from the application in DSLive, such as addresses, work location, ID numbers and the date.

The editable fields are blank, ready for you to begin entering information.

The screenshot shows the DSLive PDF Creator interface. The form is pre-filled with information from the application. A red arrow points to the 'Applicant/Agent Address' field, which is highlighted in blue. Another red arrow points to the 'Project Line' field, which is also highlighted in blue.

**Full Plans Approval Notice**  
**Building Act 1984**  
**Building Regulations**

submit-a-plan.com

Applicant/Agent Address:  
Sarah Cutler  
Design & Build Ltd  
2nd Floor  
3  
Royal Crescent  
Cheltenham  
Glos  
GL503DA

SAP Submission ID: (405-354639-37488728) Date Deposited: 05-04-2017

Your Refs: SAP/FP/1269  
15/2234/EPPA

Surveyor:  
Project Line:

Location of Work:  
2nd Floor, 3, Royal Crescent, Cheltenham Gloucestershire GL503DA

Details of Work:  
Single storey extension

The plans of the works described above have been checked and passed by this Authority as complying with the Building Regulations.  
This approval is for the purpose of the requirements of Building Regulations only.  
It is **NOT** planning permission or an approval for a grant.  
AS PREVIOUSLY NOTIFIED, YOU SHOULD CHECK WHETHER PLANNING PERMISSION IS REQUIRED FOR ABOVE WORKS ON 01242 260505.  
Please note you are legally required to notify us of the date of commencement of works.

AUTHORITY:  
Signed: Building Control Manager

Save Cancel

Simply click on an editable field and when a cursor appears in the box you can begin typing.

Once you have finished filling in your form, click the green **'Save'** button at the bottom of the form. Click **'Cancel'** if you wish to discard.

SAP Submission ID: {405-354639-37488728} Date Deposited: 05-04-2017

Your Refs: SAP/FP/1269 Surveyor: Joe B  
15/2234/EFPA Direct Line:

Location of Work:  
2nd Floor, 3, Royal Crescent, Cheltenham Gloucestershire GL503DA

Details of Work:  
Single storey extension

The plans of the works described above have been checked and passed by this Authority as complying with the Building Regulations.



## 2. Saving the Document

The **'Save PDF'** box will open.

Save new PDF

Please specify a name for your PDF.

Name: 15-2234-EFPA\_05042017\_142623

Description: Approval Certificate 3

Folder: Choose a folder to save the file to.  
Plans  
Specs

Save PDF Cancel

A document will always be saved with the application's **'Back Office'** number and the day's date to ensure you never overwrite a previous form. You can change the description field to anything you wish so you can add your own title or reference if you wish.

**Tip:** Learn how to add a Back Office ID number to an application by downloading a guide here ['adding a back office ID'](#) or from our guide sheets page here [guide sheets](#) or why not watch a video guide on our videos page here [videos](#)

You will be asked which folder you would like to save the document to. If you create your own folders in an application's document tab to organise its documents then you will be able choose one of these to save your new certificate to. Alternatively if you leave this field blank the certificate will be saved to the main list of application documents by default.

Click 'Save PDF' to confirm



**Tip: Creating 'share-able' Document Folders**

*If you wish to share the certificate or document you create with the applicant and agent you will need to create a share-able folder in the application's 'documents' tab that you can either save the document to at this stage or add it to later. Find out more about this in the next section.*

You will now find the document saved in the application's 'Documents' tab.

It will be saved in the folder that you chose to save it to but will also be listed under the main 'Application Documents' folder where all documents associated with the application whether original or newly added are listed. You'll notice the date and time the document was created has been added to the description.

You can view the document at any time by right-clicking and selecting 'View Document' to view it in the DSLive Document Viewer or 'Open with Adobe' to view as a PDF.

The screenshot shows the 'Documents' tab in an application. On the left, there is a tree view under 'View Application Details' with folders like 'Application Documents', 'Inspection Documents', and 'Document Folders'. The main area is a table of documents. A context menu is open over the document '15-2234-EFPA\_05042017\_142623.pdf', showing options like 'View Document', 'Open with Adobe Acrobat', and 'Download Document'. Below the screenshot, a red arrow points to a zoomed-in view of the document table.

Name	Description	Drawing	Sht.	Rev.	Size	Origin	Created Date
P07 Notes.pdf	P07 Notes.pdf	30512_428986_62606	1	-	601.96 KB	Additional	12 May 2015
421645485654856test.pdf	421645485654856test.pdf	30512_59043_9083	1	-	443.00 KB	Additional	12 Jun 2015
421344426244262P07 Notes.pdf	421344426244262P07 Notes.pdf	30512_50464_3621	1	-	601.96 KB	Additional	12 Jun 2015
plan.png	plan.png	1936_504126_56136	1	-	16.43 KB	Additional	07 Aug 2015
Ground Floor Plans.pdf	Ground Floor Plans.pdf	54639_34116_3389	1	A	140.57 KB	Revision	17 Apr 2015
a2a33cb366be425ce063c05fcb00675d.jpg	a2a33cb366be425ce063c05fcb00675d.jpg	1936_809054_42269	1	-	59.01 KB	Additional	25 Jul 2016
15-2234-EFPA_05042017_142623.pdf	Approval Certificate 3 - 05/04/2017 14:54	1936_102869_656724	1	-	113.42 KB	Additional	05 Apr 2017

a2a33cb366be425ce063c05fcb00675d.jpg	a2a33cb366be425ce063c05fcb00675d.jpg	1936_809054_42269	1	-	59.01 KB	Additional	25 Jul 2016
15-2234-EFPA_05042017_142623.pdf	Approval Certificate 3 - 05/04/2017 14:54	1936_102869_656724	1	-	113.42 KB	Additional	05 Apr 2017

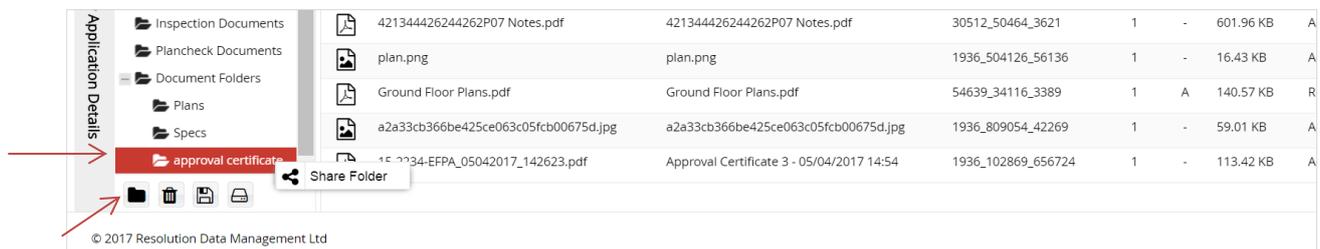
### 3. Notifying and Sharing with the Applicant/Agent

When you save the document you will also be asked if you wish to notify the applicant/agent that the document has been created. An email will be sent to the applicant/agent.

You can also share the document with the applicant or agent or another contact using PlanShare. PlanShare works by adding a document to one of our **'share-able'** folders in the application's **'Documents'** tab then sharing that folder with an email address.

To create a new **'share-able'** folder click the **'Create Folder'** button below your other document folders (see image below). You can then drag and drop the document into it from the main **'Application Documents'** folder depositing a copy. You can then right-click on the new folder, click **'Share'** and follow instructions for adding an email address. The folder with its document will be shared with the applicant/agent where they can view and download it online in their Submit-a-Plan account.

Learn how to share a folder of documents using PlanShare by downloading a guide here ['PlanShare Guide'](#) or from our guide-sheets page here [Guide-Sheets page](#).



**Tip:** If you create your share-able folder prior to creating your certificate or document, when you go to save the document, that folder will appear in the application's list of document folders as a location for you to save it.



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

For other guide-sheets and video tutorials visit the DSLive Help Hub:  
<http://www.resolutiondm.com/dslivehelpub>

