

User Admin Tool

Draft Manual

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Section F: Standard Forms

Please download separate document from the guidesheets section of our DSLive Help Hub at the link below or request to have a copy emailed to you.

Section G: DSLive Reports

Please download separate document from the guidesheets section of our DSLive Help Hub at the link below or request to have a copy emailed to you.

DSLive Help Hub Guide-Sheets:

<http://www.resolutiondm.com/guidesheets>

Introduction

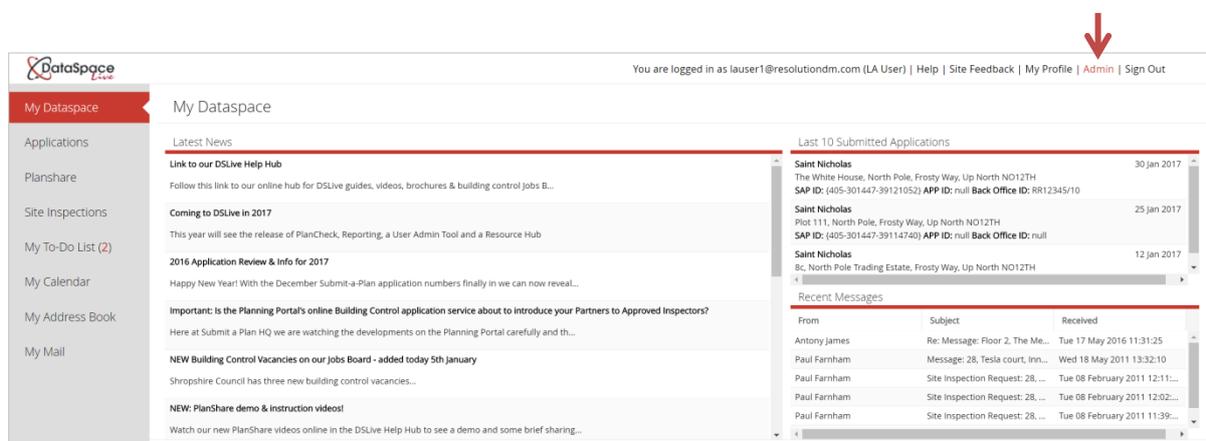
Note: This is a draft manual due to this module being a newly developed release to DSLive. This means that some of the details and processes in this guide may change.

The DSLive User Admin Tool has been created to give authorities more control over their own DSLive account. This includes being able to manage your own users and their login details as well as managing some elements of DSLive that can be defined by each authority individually, such as templates and standard notes for our Inspections, PlanCheck and Standard Forms facilities.

In addition to this you'll also find **'DSLIVE Reports'** here which enables authorities to create reports across all applications and inspections and other items which can be defined by a range of different DSLive fields and criteria.

The Admin Tool is not accessible to all users but will usually be accessible by a manager and/or a selected administrator/technician. In order to have access to it, we will need an email from the head of building control confirming which email addresses need admin/supervisory access to DataSpace Live. Once you have had this added, the Admin link will become available.

The setup user will be able to access the admin tool via an **'Admin' link at the top right corner of their DSLive profile:**



The screenshot shows the DataSpace Live user interface. At the top right, the user is logged in as 'lauser1@resolutiondm.com (LA User)'. A red arrow points to the 'Admin' link in the top right corner of the page. The main content area is titled 'My Dataspace' and contains several sections: 'Latest News' with links to help hubs and application reviews; '2016 Application Review & Info for 2017'; 'Important: Is the Planning Portal's online Building Control application service about to introduce your Partners to Approved Inspectors?'; 'NEW Building Control Vacancies on our Jobs Board - added today 5th January'; and 'NEW: PlanShare demo & instruction videos!'. On the right side, there are sections for 'Last 10 Submitted Applications' and 'Recent Messages'.

Section A: The Admin Tool Dashboard

When you open the admin tool, you will be presented with your **Admin Tool Dashboard**. Here you'll find your Admin Tool Menu, a quick-glance summary of your **'DSLIVE Data'** and currently **'Logged in Users'** as well as your **DSLIVE news feed**.

Admin Tool Menu →

DSLIVE Data Overview

Logged in Users

Data Overview	
Storage Used:	628 MB
Live Apps:	151
Archived Apps:	961
Active Planshares:	76
Subscription Level:	Submit a Plan Office

Logged in users	
lauser1@resolutiondm.com	

DSLIVE Data Overview

Your Data Overview provides a quick-glance summary of how many live applications, archived applications and PlanShares your authority currently has in its DSLIVE account. It also lets you know how much storage you've used and which Submit-a-Plan Account Subscription you currently have.

Logged in Users

Sometimes if your users forget to sign-out properly using the 'Sign Out' link in their account profile, the system thinks you have used up all your licences and will not allow another user to sign-in. This is where your **'Logged in Users'** list comes in handy. If the system tells you all your licences are used up, you come to the Admin Tool to check who is still logged in. Once everybody has logged out, the licences will clear after about 10 minutes if not instantly.

Menu

On your admin tool menu you will find tabs for managing your authority details and DSLIVE users, managing your information for Inspections, Plan-Check, Standard Forms as well as our DSLIVE Reporting facility. Simply click on a tab to open it.

To leave the Admin Tool and return to DSLIVE click on the **'Dataspacelive'** tab:

Dataspacelive

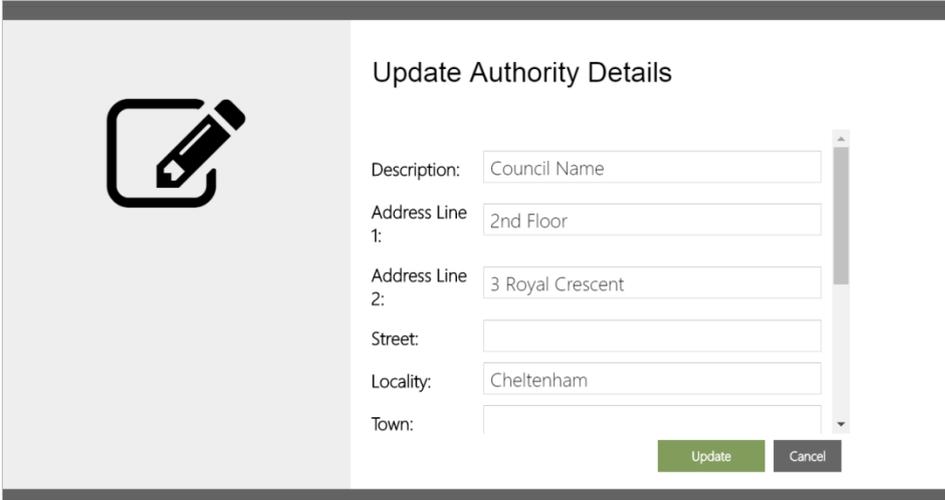
Section B: Your Authority Details

Under the **'Authority Details'** tab are the basic details for your department such as your address and contact details. Keeping these up to date means that the address and contact details displayed on application forms and the certificates and other documents you create online in DSLive is also accurate and up to date.

Simply click on the **'Update'** button on the tool bar of this tab to change any of the details displayed. 

You can also make sure the **'External Fees'** link (a link included on the fees page of a Submit-a-Plan online application form to direct applicant/agents to a list of fees on your building control council webpages) is up to date.

Simply click on the **'Update'** button on the tool bar of this tab to change any of the link displayed. 





Update Authority Details

Description:

Address Line 1:

Address Line 2:

Street:

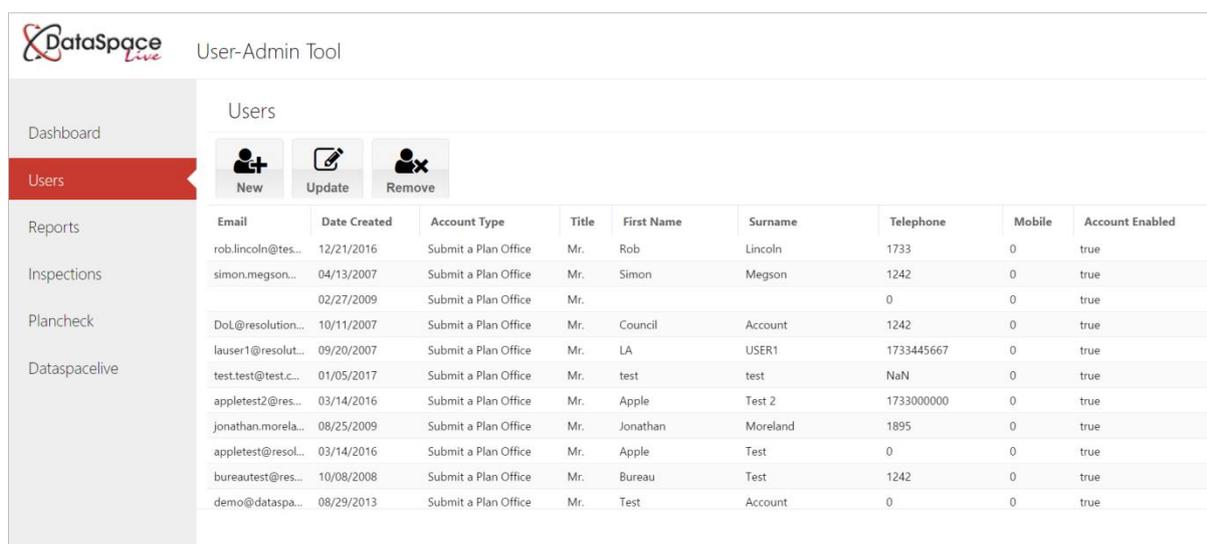
Locality:

Town:

Section C: Managing Your Users

Under your **'Users'** tab your authority will be able to manage your DSLive users and their login details. Here you will be able to add, edit or remove the users who login to your authority's DSLive account.

In your list of users will be displayed the users' email address which their DSLive login is setup up, as well as the date on which they were set up and whether their account is currently enabled.



The screenshot shows the 'User-Admin Tool' interface. On the left is a navigation menu with 'Users' selected. The main area displays a table of users with columns for Email, Date Created, Account Type, Title, First Name, Surname, Telephone, Mobile, and Account Enabled. Below the table are three buttons: 'New', 'Update', and 'Remove'.

Email	Date Created	Account Type	Title	First Name	Surname	Telephone	Mobile	Account Enabled
rob.lincoln@tes...	12/21/2016	Submit a Plan Office	Mr.	Rob	Lincoln	1733	0	true
simon.megson...	04/13/2007	Submit a Plan Office	Mr.	Simon	Megson	1242	0	true
	02/27/2009	Submit a Plan Office	Mr.			0	0	true
DoL@resolution...	10/11/2007	Submit a Plan Office	Mr.	Council	Account	1242	0	true
lauser1@resolut...	09/20/2007	Submit a Plan Office	Mr.	LA	USER1	1733445667	0	true
test.test@test.c...	01/05/2017	Submit a Plan Office	Mr.	test	test	NaN	0	true
appletest2@res...	03/14/2016	Submit a Plan Office	Mr.	Apple	Test 2	1733000000	0	true
jonathan.morela...	08/25/2009	Submit a Plan Office	Mr.	Jonathan	Moreland	1895	0	true
appletest@resol...	03/14/2016	Submit a Plan Office	Mr.	Apple	Test	0	0	true
bureautest@res...	10/08/2008	Submit a Plan Office	Mr.	Bureau	Test	1242	0	true
demo@dataspa...	08/29/2013	Submit a Plan Office	Mr.	Test	Account	0	0	true

1. Adding a User

You will be able to add users to the list by clicking on the **'New User'** button on the toolbar. 

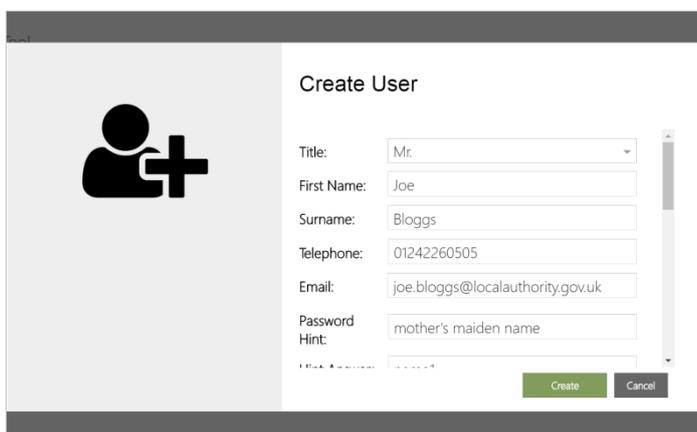
The **'Create User'** window will open.

User Details

You will find a number of fields to fill in with the user's details.

These include their name, contact number and the email address and password with which they would like to login to DSLive with.

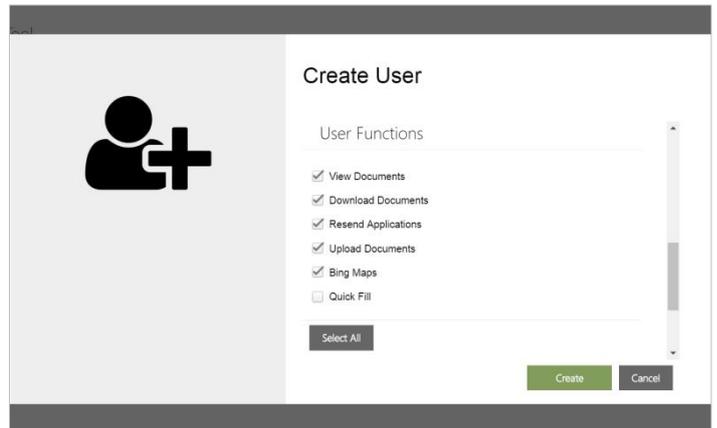
(Please Note: passwords are case sensitive).



The 'Create User' window contains a form with the following fields: Title (dropdown menu with 'Mr.' selected), First Name (text input with 'Joe'), Surname (text input with 'Bloggs'), Telephone (text input with '01242260505'), Email (text input with 'joe.bloggs@localauthority.gov.uk'), Password (text input with 'mother's maiden name'), and Hint (text input with 'mother's maiden name'). There are 'Create' and 'Cancel' buttons at the bottom right.

User Functions

As you scroll down you will also be asked to select the functions your user will have in DSLive, such as being able to view, upload and download documents, view a work location on a map or use Quick Fill to add ID numbers to apps or to quickly register applications in your own Back Office system.



Click the **'Create'** button to apply and add your user to the list or cancel to discard your changes.



Back in the **'Users'** tab, you will now see the new user added to your list of users:

Users								
Email	Date Created	Account Type	Title	First Name	Surname	Telephone	Mobile	Account Enabled
rob.lincoln@tes...	12/21/2016	Submit a Plan Office	Mr.	Rob	Lincoln	1733	0	true
joe.bloggs@loc...	02/06/2017	Submit a Plan Office	Mr.	Joe	Bloggs	1242260505	0	true
appletest@resol...	03/14/2016	Submit a Plan Office	Mr.	Apple	Test	0	0	true
bureautest@res...	10/08/2008	Submit a Plan Office	Mr.	Bureau	Test	1242	0	true
demo@dataspac...	08/29/2013	Submit a Plan Office	Mr.	Test	Account	0	0	true
traininguserdol...	08/07/2007	Submit a Plan Office	Mr.	Training	User DOL	1242	0	true
helndesk@resol...	12/07/2007	Submit a Plan Office	Mr.	Heln	Desk	1242	0	true

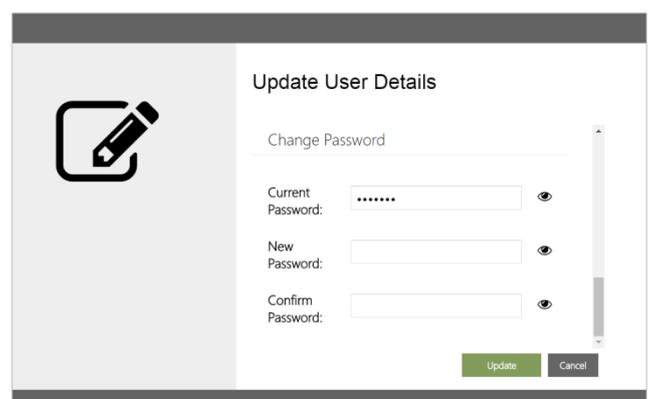
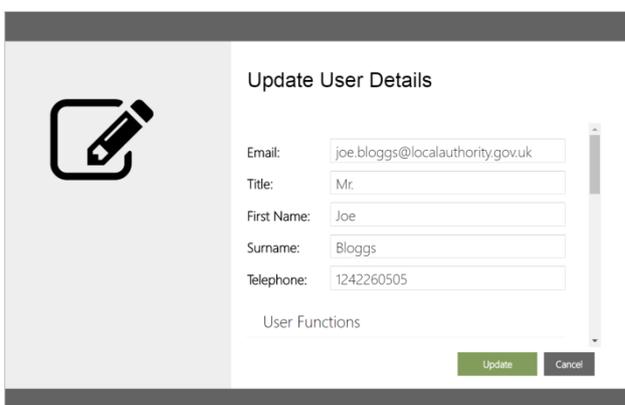
2. Updating a User

You can edit a user by clicking on them in the list to select and highlight them and clicking on the **'Update User'** button on the toolbar.



The **'Update User'** window will open where you can edit any of the user's details, user functions or to change their password (see images below).

Click **'Update'** to apply the changes or cancel to discard.



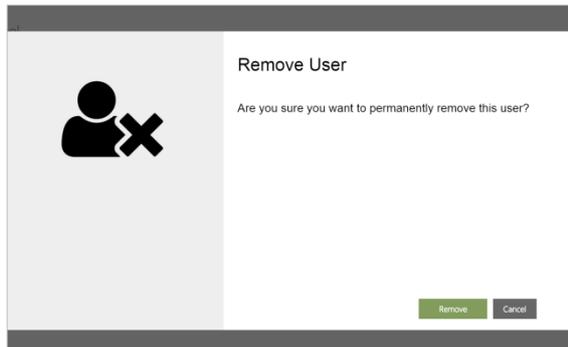
3. Removing a User

You can remove a user by clicking on them in the list to select and highlight them and pressing the **'Remove User'** button on the toolbar.



You will be asked to confirm whether you want to permanently remove the user.

Once you have clicked **'Remove'**, the user will be removed from the list of users in the user tab and will no longer be able to log in to DSLive.



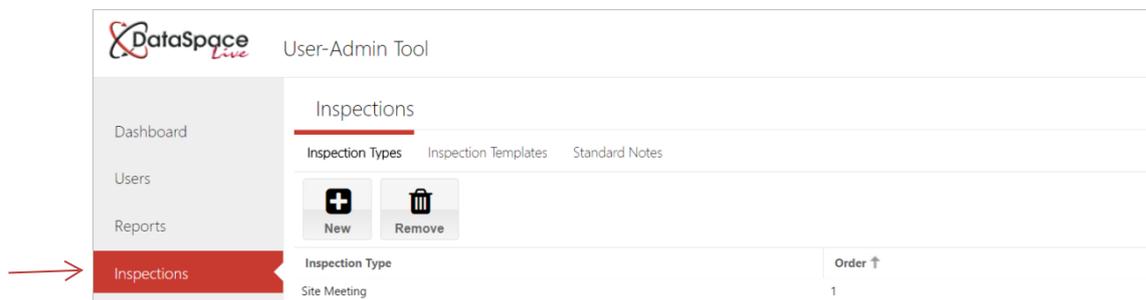
Section D: Managing your Inspection Information

Under the **'Inspections'** tab you will not only be able to manage the types of inspections you have, but also the templates you create for adding sets of inspections types to applications and the standard notes that can be added to an inspection in DSLive or using the Inspection App.

We know that often authorities use the same set of inspection types or responses over and over again, so to make life easier we came up with templates and drop-down lists of standard notes so that when using the module you no longer have to add each inspection type manually or type out the same comment each and every time.

We also know that authorities may vary slightly in how they do things to one another and that one authority's inspection types, templates responses may need to be different from another's. That's where the User Admin Tool comes in, allowing you to manage the information your specific authority uses.

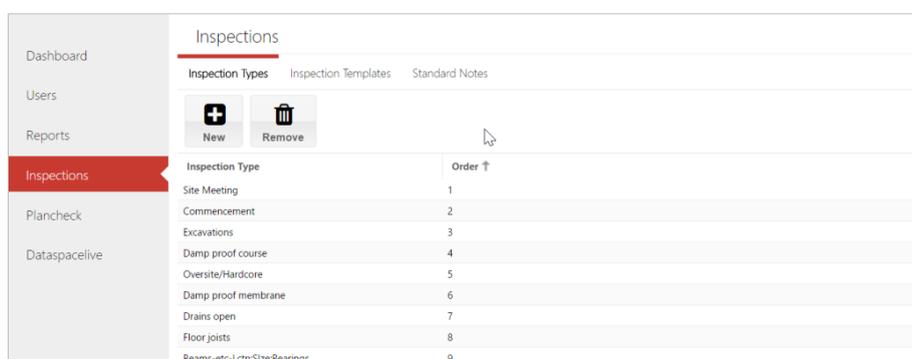
You will notice there are three smaller tabs for managing your different inspection information. Simply click on a tab to view it.



1. Inspection Types

If you are using the 'Inspections Tab' in an application in DSLive, you will be asked to select the types of inspection that need to be carried out for that particular application. You can decide what inspection types are available to choose from and manage them here in the Admin Tool by clicking on the **'Inspection Types'** tab.

Below is how your list of inspection types will look once you've added them. Once added you will be able to reorder them in the list as you wish by dragging them.



a. Adding an Inspection Type



To add an inspection type click **'New Type'** on the toolbar.

The **'Add Inspection Type'** window will open.

You will be asked to add a **'Description/ Title'** of your new inspection type.

Click **'Add'** to add apply.



Your new inspection type will be added to the bottom of your inspection types list.

Roofing	10
Drains tested	11
Soil vent pipe test	12
Completion & OK	13
Miscellaneous	14

The order in which the inspection types appear here in the list is also the default order they will appear in the DSLive. You can rearrange the default order here if you wish.

To reorder: Simply click on the inspection to highlight it and drag and drop it to the position you desire (see images below).

Inspection Type	Order ↑
Site Meeting	1
Commencement	2
Excavations	3
Damp proof course	4
Oversite/Hardcore	5
Floor joists	6
Damp proof membrane	7
Drains open	8
Beams-etc-Lctn;Size;Bearings	9
Roofing	10
Drains tested	11
Soil vent pipe test	12
Completion & OK	13
Miscellaneous	14

⛔ Drag and drop to reorganize

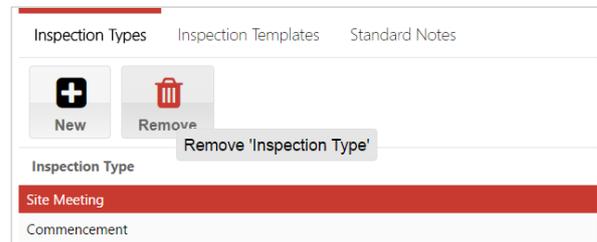


Inspection Type	Order ↑
Miscellaneous	1
Site Meeting	2
Commencement	3
Excavations	4
Damp proof course	5
Oversite/Hardcore	6
Floor joists	7
Damp proof membrane	8
Drains open	9
Beams-etc-Lctn;Size;Bearings	10
Roofing	11
Drains tested	12
Soil vent pipe test	13
Completion & OK	14

a. Removing an Inspection Type



To remove an inspection type from the list simply select it in the list and press the **'Remove'** button on the tool bar.



2. Inspection Templates

If you tend to be adding the same set of inspection types to applications quite frequently in DSLive, you can save as template of them to make adding the same selection to future regimes quick and easy. This is done in DSLive by pressing the **'Save selection as template'** button when you are adding types to an application's inspection regime.

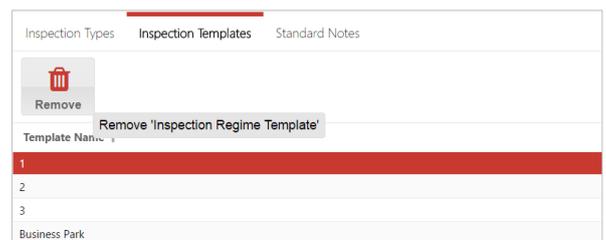
Once saved there may be times that you need to replace or completely remove such a template and this can be managed here in the admin tool.

a. Removing a Template



Simply click on the template in the list and press the **'Remove'** button on the toolbar.

When prompted confirm that you wish to remove the template.



Tip: If you wish to replace an existing template with a new one, delete the existing template here in the admin tool then save a new one in DSLive when you next add that selection to an application's inspection regime.

3. Standard Inspection Notes

Standard notes are a set of commonly used comments connected to inspections. Once created these notes will appear in the DSLive Inspections Tab and on the Inspections App so that they can be added to an inspection as and when needed.

You can manage your standard notes here under the 'Standard Notes' tab:

User-Admin Tool

Inspections

Inspection Types Inspection Templates **Standard Notes**

Standard Note	Inspection Type ↑
Roof joists 150 x 50 c16 at 400c/c. Firrings laid to fall. Cold/warm deck roof to be used. Restraint straps in position.	Beams-etc-Lctn;Size;Bearings
Brick/block walls up to DPC level with 100mm cavity. DPC laid and lapped into existing. Cavities opened at junction with existing walls and wall profiles fitted.	Damp proof course
New drainage on water test from new WC/Bathroom/Kitchen to new/existing inspection chamber.	Damp proof membrane
Floor joists 200 x50 c16 at 400c/c. solid strutting provided. Sub floor vented and oversite concreted.	Drains open
Hardcore laid and compacted. Sand blinding and DPM in position with 100mm PIR insulation. Ready for concrete slab.	Excavations
Robts tested	Excavations
Walls erected up to plate level. Cavity walls with brick/lightweight block and 100mm cavity partial fill with 50mm PIR insulation/ full fill with mineral wool. Steel lintels provided o...	Floor joists

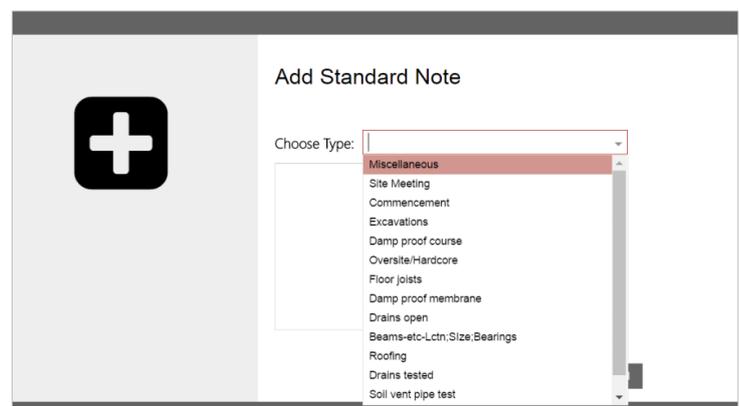
a. Adding a new Standard Note

To add a new standard note, press the 'New Note' button on the toolbar



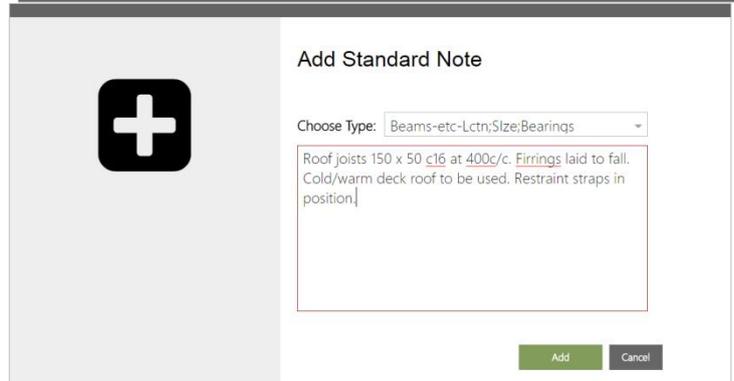
The 'Add Notes' window will open.

First you will be asked to choose the type of inspection you wish to add a standard note for.



You can then type in your standard note to the text window below.

Click 'Add' to apply.



The note will be added to the list, displaying the note and inspection type it belongs to.

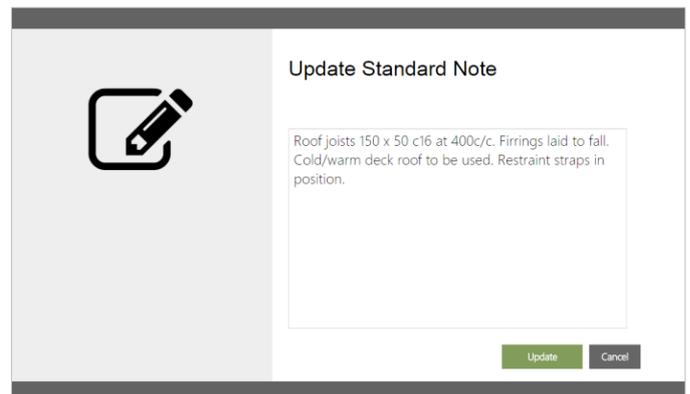
Standard Notes	
<div style="display: flex; justify-content: space-around;"> New Update Remove </div>	
Standard Note	Inspection Type ↑
Roof joists 150 x 50 c16 at 400c/c. Firrings laid to fall. Cold/warm deck roof to be used. Restraint straps in position.	Beams-etc-Lctn;Size;Bearings
Brick/block walls up to DPC level with 100mm cavity. DPC laid and lapped into existing. Cavities opened at junction with existing walls and wall profiles fitted.	Damp proof course
New drainage on water test from new WC/Bathroom/Kitchen to new/existing inspection chamber.	Damp proof membrane
Floor joists 200 x50 c16 at 400c/c. solid strutting provided. Sub floor vented and oversite concreted.	Drains open
Hardcore laid and compacted. Sand blinding and DPM in position with 100mm PIR insulation. Ready for concrete slab.	Excavations
Robts tested	Excavations
Walls erected up to plate level. Cavity walls with brick/lightweight block and 100mm cavity partial fill with 50mm PIR insulation/ full fill with mineral wool. Steel lintels provided o...	Floor joists
New foul drains laid serving WC/Bathroom/Kitchen. 100mm UPVC laid and bedded in pea gravel connecting to new/existing inspection chamber.	Oversite/Hardcore
Steel beams installed over opening. Beam sizes connections bearings and padstones as per approved design.	Roofing

b. Updating a Standard Note



To update a standard note, simply click on it in the list to highlight it and press the 'Update' button on the toolbar.

Here you can edit the existing text and click 'Update' to apply.

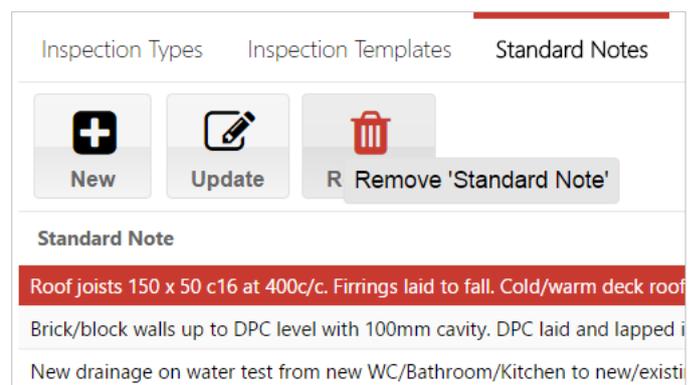


c. Removing a Standard Note



To remove a standard note, simply click on it in the list to highlight it and press the 'Remove' button on the toolbar.

Confirm that you would like to remove the note when prompted.



Section E: Managing your PlanCheck Information

1. PlanCheck Types

When using PlanCheck in an application you will be asked to add a check-list of checks to work through. Here in the **'PlanCheck Types'** tab in the Admin Tool you can define what checks you wish to be available to the check-list.

Here you can create **'Sections'** such as **'Structure'**, **'Fire Safety'** and **'Hygiene'** as well as creating the different **'Checks'** that go under those sections.



a. Creating a Section

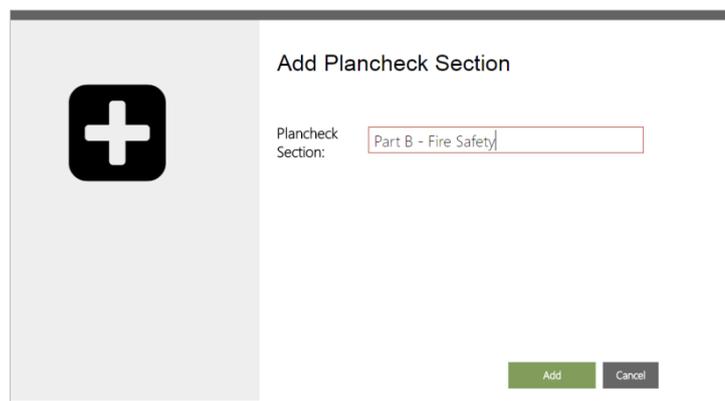
To create a new **'Section'** simply click the **'New'** button on the toolbar 

The **'Add Section'** window will open.

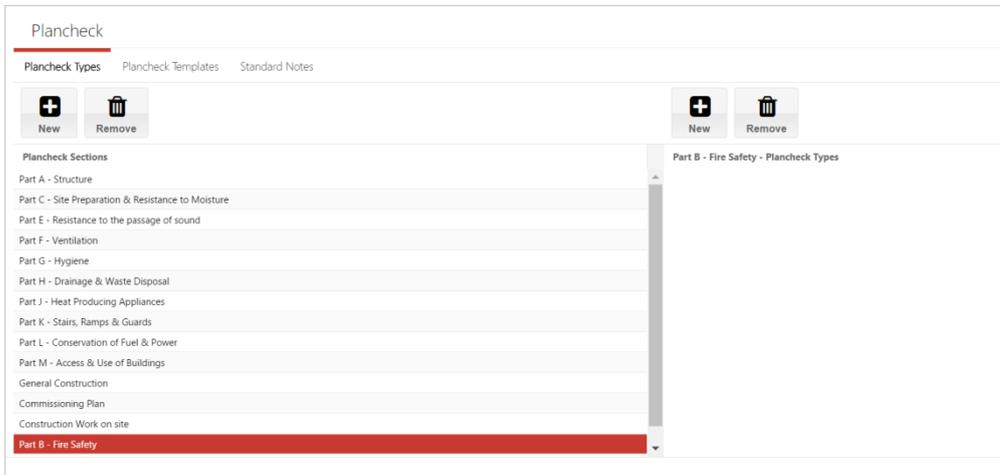
You can give your section any name you like and you can use a mixture of letters and numbers if you wish.

You will be able to reorder your sections later so don't worry if you don't add them in order here.

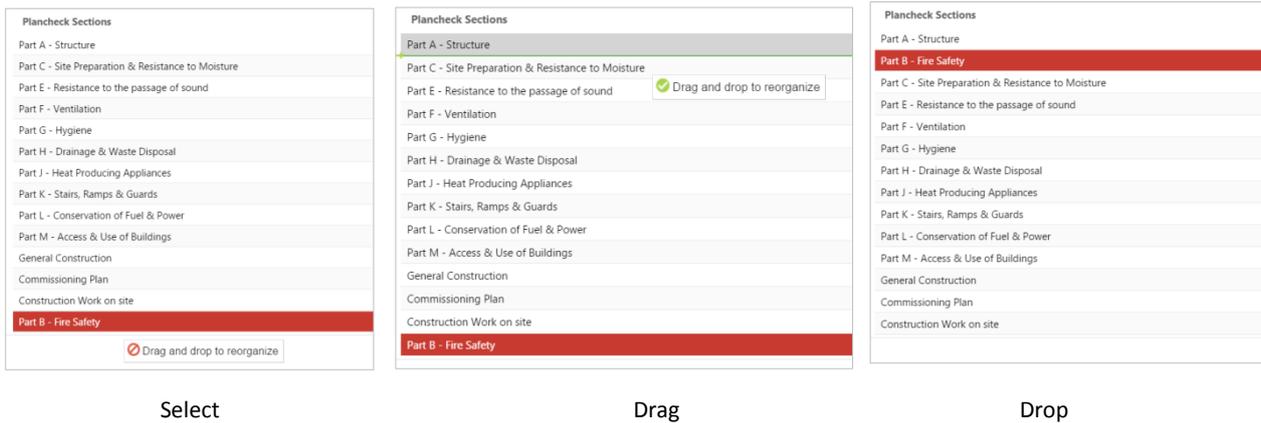
Click **'Add'** to apply 



The new 'Section' will be added to the bottom of your list of PlanCheck Sections:



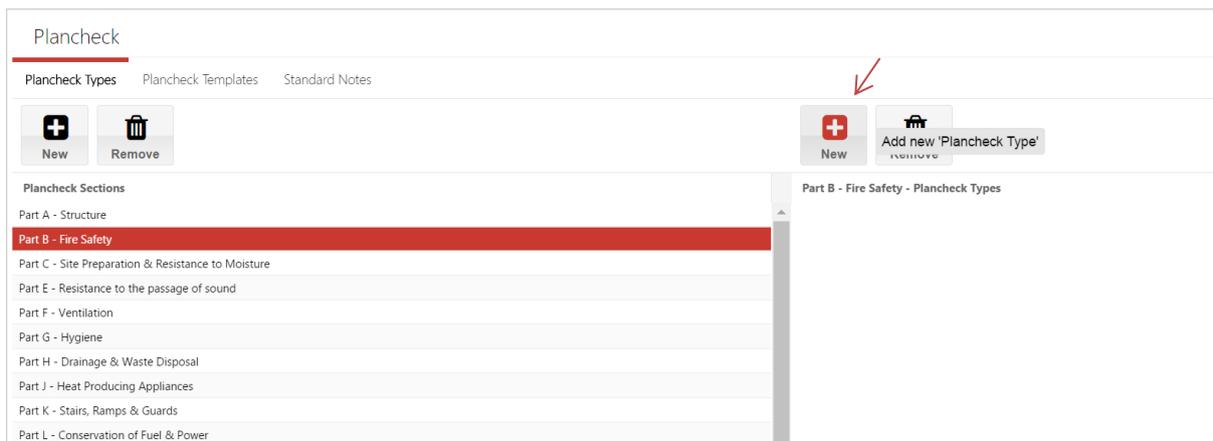
To reorder items in your list, simply select it and drag and drop it to the desired position.



b. Adding Checks to a Section

Once you have added a main section you can now begin adding as many checks to it as you like.

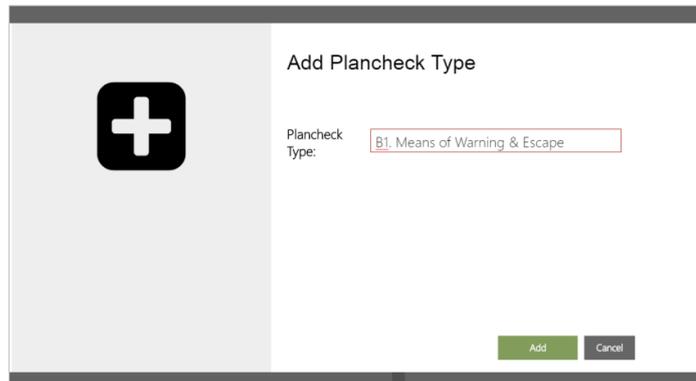
To do this simply click on the section in the list to highlight it and click the 'New' button in the **+** 'Check' window to the right.



The **'Add Check'** window will open.

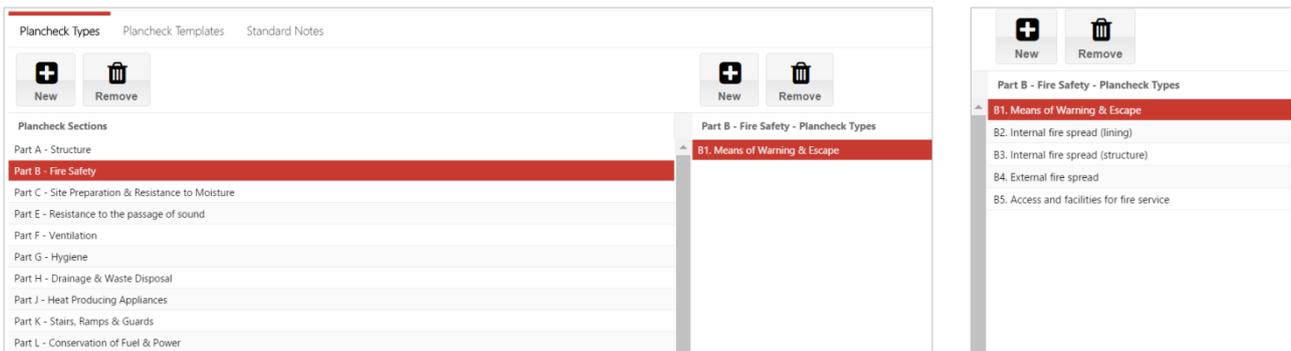
You can give your check any name you like and you can use letters and numbers if you wish.

Click **'Add'** to apply



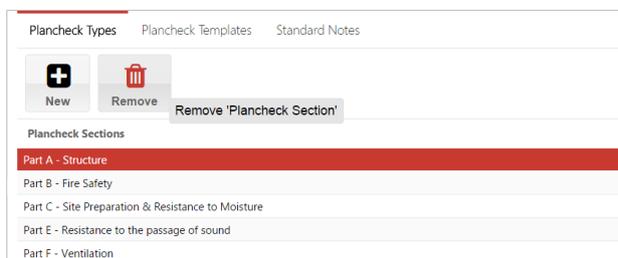
Your new check will be added to the 'section'. To view a section's checks, click on the section in the list to the left and they will become visible in the checks window on the right (see below).

To add more checks to a section follow the same process as before.

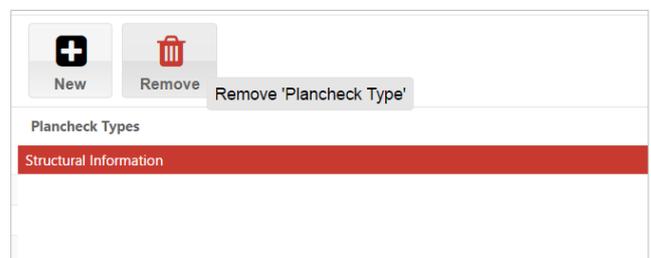


c. Removing a Section or a Check

To remove a **'Section'** or a **'Check'**, click on the item to highlight it and press the **'Remove'** button in that window.



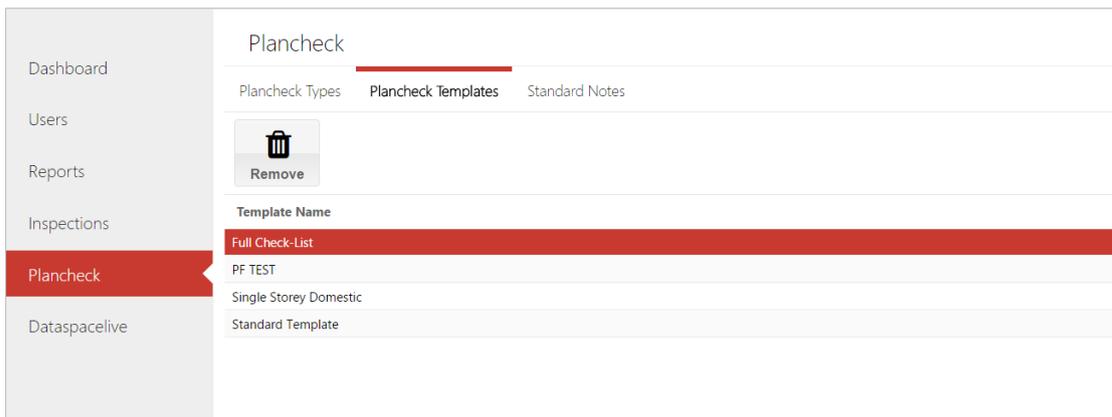
Removing a section



Removing a check

2. PlanCheck Templates

If you are adding the same sets of checks to application on a frequent basis, you may wish to save templates of them to save time in adding them again in the future. Templates are saved when creating a check-list in an application's Plan-Check tab in DSLive and clicking the **'Save as Template'** button. Here in the admin tool is where you can remove them.



a. Removing a template

To remove a template simply click on it in the list to highlight it and press the **'Remove'** button  on the toolbar. When prompted confirm you wish to remove it.

Tip: There may be times that you need to change or replace a template. You can remove a template here in the admin tool and then save new ones when creating a check-list in DSLive.

3. Standard PlanCheck Notes

Standard notes are a set of commonly used comments connected to plan-checking. Once created these notes will be available to application's Plan-Check tab when a user chooses to add a pre-defined comment to a check.

You can create and manage your standard notes here under the 'Standard Notes' tab:

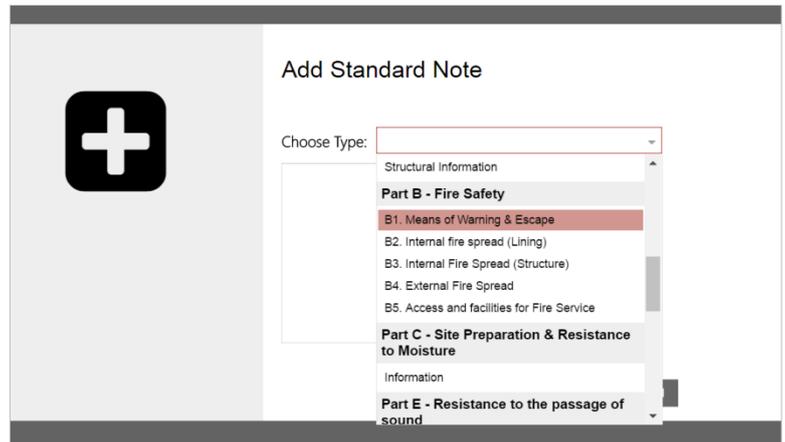


a. Adding a new Standard Note

To add a new standard note, press the **'New Note'** button on the toolbar. 

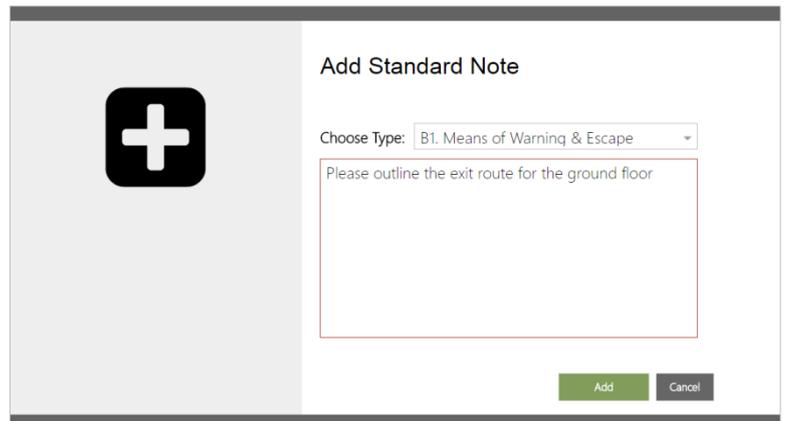
The **'Add Note'** window will open.

You will be asked to which of your **PlanCheck Sections** and which **Check** under that section you would like to add a standard note.



You can then type your standard note in the text space provided.

Click **'Add'** to apply



Your note will be added to the list, connected to the section and check it belongs to mentioned:



To add another note to the same check, repeat the same process. Once you have a long list of notes, you can use the + or – symbols to view or hide the notes for each section, making it easier to view them.

Plancheck Types		Plancheck Templates		Standard Notes	
<div style="display: flex; justify-content: space-around;"> + New ✎ Update 🗑 Remove </div>					
Standard Note	Plancheck Section				
[-] B1. Means of Warning & Escape					
Please outline the exit route for the ground floor	Part B - Fire Safety				
Please add a fire door on the ground floor	Part B - Fire Safety				
Please upload a fire/safety analysis	Part B - Fire Safety				
[+] Construction Information					
[-] Structural Information					

b. Updating a Standard Note



To update a standard note, simply click on it in the list to highlight it and press the **'Update'** button on the toolbar.

Here you can edit the existing text and click **'Update'** to apply.

Update Standard Note

Please outline the exit route for the ground floor

Update
Cancel

c. Removing a Standard Note



To remove a standard note, simply click on it in the list to highlight it and press the **'Remove'** button on the toolbar.

Confirm that you would like to remove the note when prompted.

Remove Standard Note

Are you sure you want to permanently remove this Standard Note?

Remove
Cancel

Section F: Standard Forms

Please download separate document from the guidesheets section of our DSLive Help Hub at the link below or request to have a copy emailed to you. <http://www.resolutiondm.com/guidesheets>

Section G: DSLive Reports

Please download separate document from the guidesheets section of our DSLive Help Hub at the link below or request to have a copy emailed to you. <http://www.resolutiondm.com/guidesheets>



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



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