

User Guide for Registering and Commenting with our Online Portal

Finding things in this user guide

Once you have registered with us responding to consultations online is quick and easy. Our online portal is run for us by a company called Objective Online (formerly known as Limehouse).

This user guide provides a step by step guide to using our online portal. You can find out how to:

- Register yourself or clients
- Amend personal details
- Manage your account
- Access and comment on consultations
- Save comments and return to them later
- Submit comments

1. F	Finding and using the TAYpla Portal	an online page 3
2. F	How to Login and RegisterFor individuals/organisations community themselvesp -For agents/consultants representing people/organisations,,,,,,,,	nenting pages 7 to 13
3. <i>A</i>	Accessing Live Consultations	page 21
4. N	Making Comments	page 23
5. S	Submitting, saving and retrievers responsespag	ving draft ge 30 - 32
6. F	Help I'm Stuck	page 33

1. Finding our online Portal

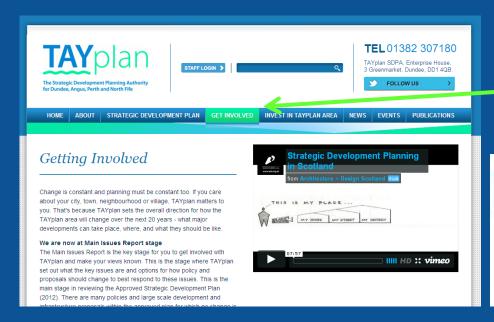
All responses to the TAYplan consultations can be made using our online Portal. Go direct to

http://tayplan-sdpa-consult.limehouse.co.uk/portal or visit

http://www.tayplan-sdpa.gov.uk/ get_involved and then click 'register with us'

Please Note:

You must be registered and logged-in to the TAYplan Portal to respond to consultations online.



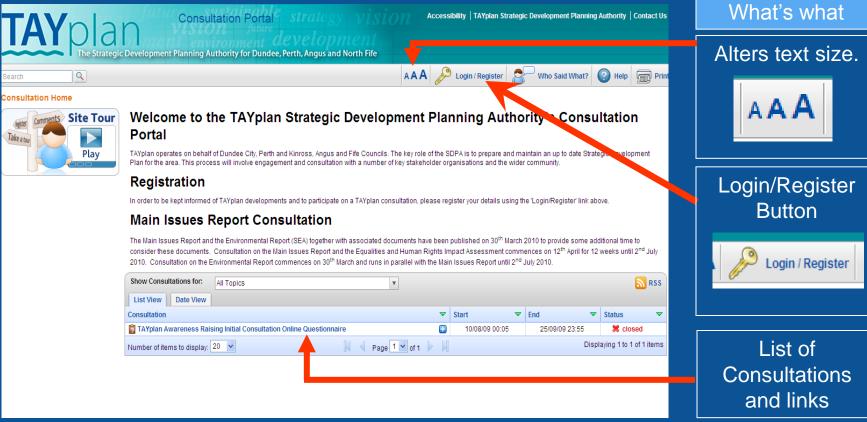
Go to the TAYplan website 'get involved page and then scroll down to the 'Register with us' button.



1. Finding our online Portal

You have now entered our online portal and will see a screen like this

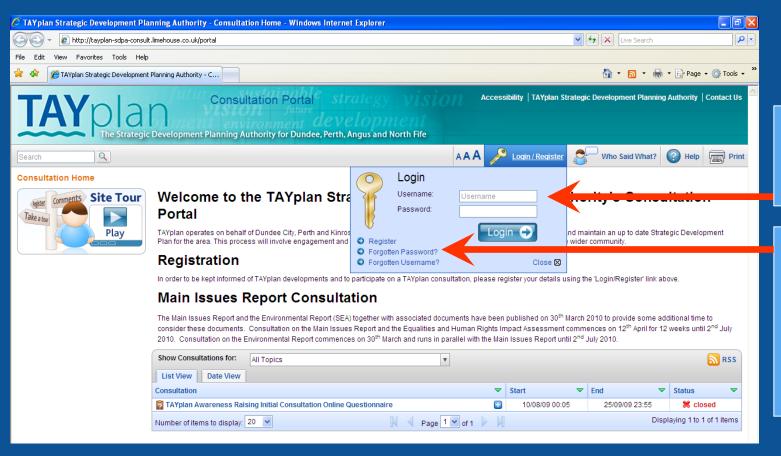
- First you need to register your details
- If you have already done this then all you need to do is login
- To do either of these click the Login/Register button at the top of the screen



2. Logging in and Registering

To respond to consultations online you need to be registered and logged in.

Go direct to http://tayplan-sdpa-consult.limehouse.co.uk/portal Click 'login/register' and select from the menu



To login enter your username and password then click login

If you do not have a username and password then click 'register' to register your details

2. Logging in and Registering

If you clicked 'register' then you will now see this screen

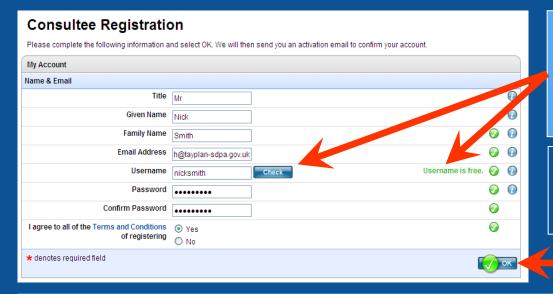


For people/organisations responding on behalf of themselves click 'Register as Consultee' and follow the instructions. See pages 7-13

For those commenting on behalf of clients click 'Register as Agent' and follow the instructions. See pages 14-20 Please note: You must provide a postal address for this to work

2A. Registering for consultees only

Fill in your details in this box and then press 'OK'



Choose a Username and password.

I Check the username is not already in use. If it is you will need to choose one that isn't.

Don't worry if you don't have an email address. You can still respond online.

Once complete press 'OK'

Once you have registered you will see this screen...



If you have an email account you will now receive confirmation from 'Objective Online'.

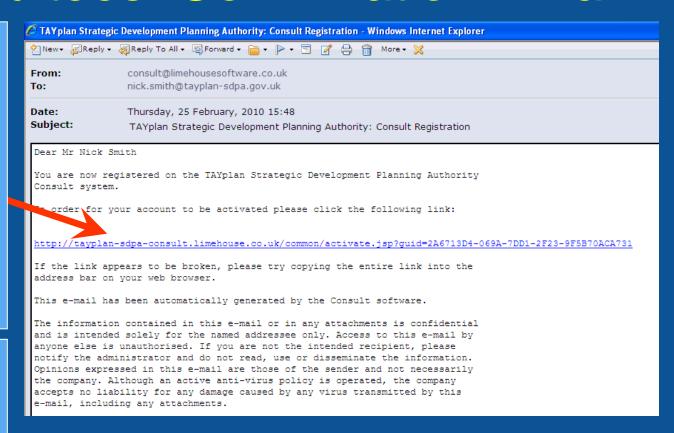
Can't see the email? Either refresh your email inbox or check your 'spam' or 'junk mail' box.

2A Consultees: Confirmation Email

Open the email and click on the link to activate your account. The link will take you to the Portal login page and activate your account.

I If you don't click on this your account will not be activated and you will not be able to login to comment online.

Don't worry if you do not have an email address.
Just return to the consultation portal at http://tayplan-sdpa-consult.limehouse.co.uk/portal and then login using your chosen username and password.



Help! Its not working and I'm stuck:

Give us a phone on 01382 307180 (9am - 5pm Mon to Fri) and we'll try to help. Answer phone messages can be left at other times and we will call you back.

2A Consultees: Now login again and complete some additional details

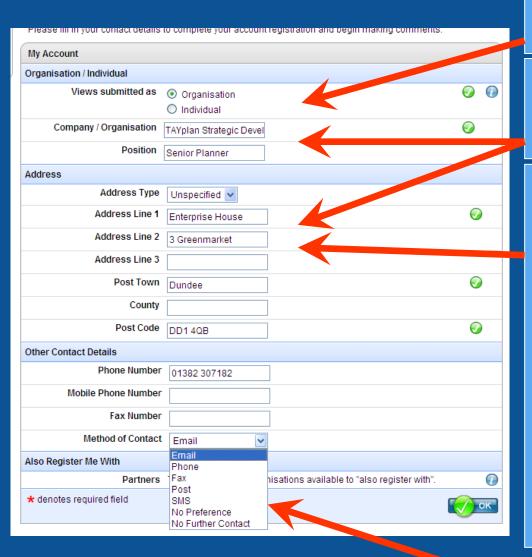
Now you have registered by clicking the link in the email (see previous page) the system will automatically produce this login screen.



Enter your username and password you have just set up.

If you forget your user name and password click here and you will be emailed your details; alternatively phone TAYplan on 01382 307180 and we will change it for you.

2A Consultees: Further details



If you are an individual member of the public tick 'individual'.

If you are responding for an organisation tick the 'organisation' button and tell us the name of the organisation eg the company, government body, community council etc.

You <u>must</u> provide a postal address for the system to work. Even if you receive all contacts by email.

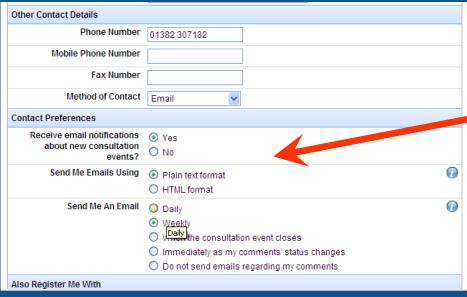
We will contact you from time to time to tell you about events, consultations and publications.

I Contact data will not be disclosed. But your name, organisation and town will be published with your comments.

Contact details for representations made at Proposed Strategic Development Plan stage will be passed to the Scottish Government Directorate for Planning and Environmental Appeals (DPEA). This is because they may need to invite you to an examination in public on the Proposed Plan to discuss your representation(s).

Please do not choose phone, fax or SMS as we do not provide these services.

2A Consultees: Further details



TAYplan Strategic Development Planning Authority (Mr Nick Smith) | TAYplan Strategic Development Plannin he Strategic Development Planning Authority for Dundee, Perth, Angus and North Fife AAA | Company | My Account | Service | AAA | Company | C **Consultation Home** ments Site Tour My Details My Account Plav My Account The information you provide will be held on computer and used for statistical purposes only Step 2 of 3 type? In which local authority area is your organisation based in? Consultee Metadata Form Finish O Female What is your age band? What is your nationality? What is your ethnicity? White - British * denotes required field

Consultee Contact preferences

Scroll down a little further and select your contact preferences.

Note: by choosing 'yes' you will receive an automatic email telling you when consultation events start and end.

Consultee Details

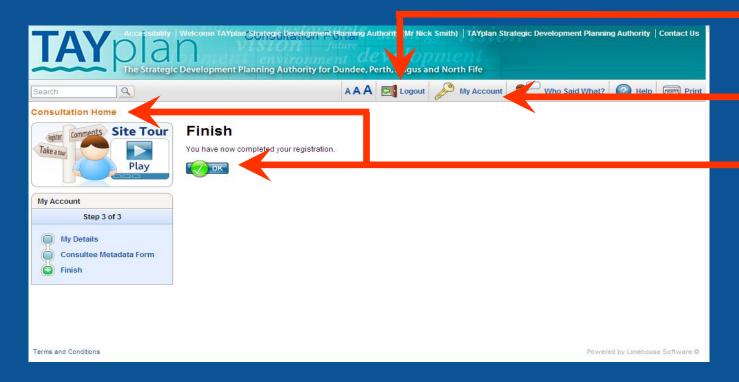
Please complete this data. It helps us to understand the broad age groups and background of individuals and the types of organisation who respond.

If you are responding for an organisation please do not complete the age, gender, nationality or ethnicity information.

! Your details will not be disclosed. But we will use this information to publish general trends about consultation exercises.

2A Consultees: Registration complete

- Once you have completed your details you should see this screen
- You are now ready to go
- You will not need to re-enter your details and just need to login each time you want to comment



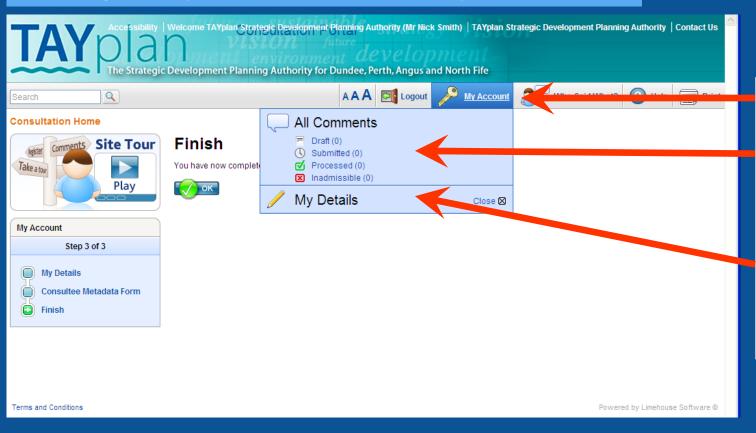
To log out and return later click here.

To amend your details click here

To continue and view the consultation documents and make comments click here

2A Consultees: Amending your details

- You can login and amend your details at any time.
- Just login using your username and password and then go to 'My Account' and click on 'My Details'



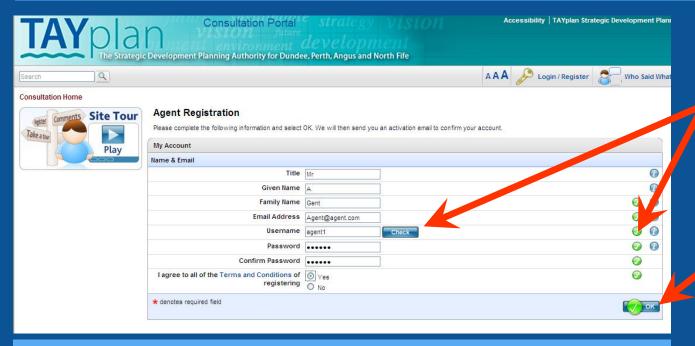
'My Account'

You can view any comments you have made.

You can also amend your contact information and other details by clicking on 'My Details'.

2B: Registering for Agents only

Complete your personal/organisation details first (you can add clients later)

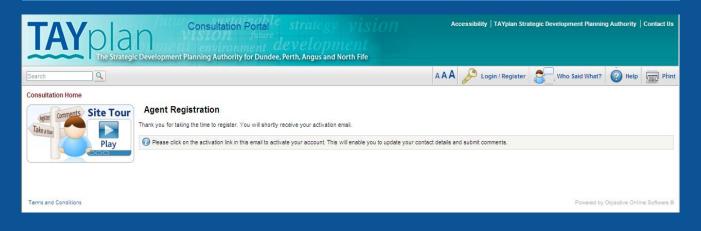


Choose a Username and password.

I Check the username is not already in use. If it is you need to choose one that isn't.

Once complete click 'OK'

Once you have registered you will see this screen...



If you have an email account you will now receive confirmation from Objective online

2B Agents: Confirmation Email

Click on the link to activate your account. This will take you to the Portal login page.

I If you don't click on this your account will not be activated and you will not be able to comment online.

Can't see the email? Either refresh your email inbox or check your 'spam' or 'junk mail' box.

Now you have registered and clicked on the email link you will see this screen.

You need to login using the user name and password you have just created.

Poer Mr A Gent

You are now registered on the TAYplan Strategic Development Planning Authority
Consult system.

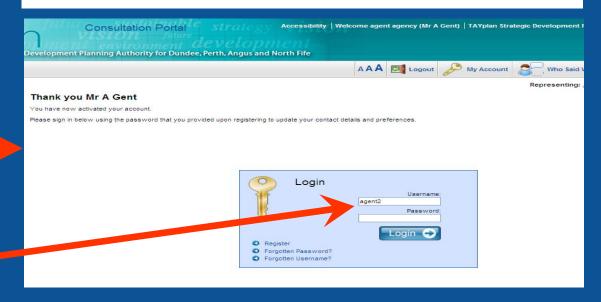
In order for your account to be activated please click the following link:

http://tayplan-sdpa-consult.limehouse.co.uk/common/activate.jsp?quid=C22BA761-E68C-E29C-B8F1-CD84A0D1AC70

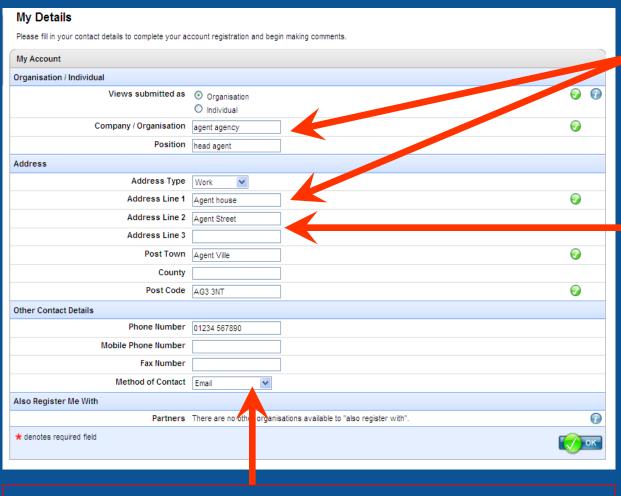
If the link appears to be broken, please try copying the entire link into the address bar on your web browser.

This e-mail has been automatically generated by the Consult software.

The information contained in this e-mail or in any attachments is confidential and is intended solely for the named addressee only. Access to this e-mail by anyone else is unauthorised. If you are not the intended recipient, please notify the administrator and do not read, use or disseminate the information. Opinions expressed in this e-mail are those of the sender and not necessarily the company. Although an active anti-virus policy is operated, the company accepts no liability for any damage caused by any virus transmitted by this e-mail, including any attachments.



2B Agents: Further details



Please do not choose phone, fax or SMS as we cannot suppor these methods of contact.

Tick the organisation button and add the details.

You <u>must</u> provide a postal address for the system to work. Even if you receive all contacts by email.

! Contact data will not be disclosed. But your name, organisation and town will be published with your comments.

Contact details for representations made at Proposed Strategic Development Plan stage will be passed to the Scottish Government Directorate for Planning and Environmental Appeals (DPEA). This is because they may need to invite you to an examination in public on the Proposed Plan to discuss your representation(s).

2B Agents: Letter Headings

Objective will ask you to create letter headings based on your information.



To edit the details click 'Edit' – otherwise click 'Next' to move on.

My Account	My Letterhead		
Step 2 of 3	These settings allow you to personalise PDFs printe document.	d from the Consultation Portal. A combination of address details, contact details and your own	ogo can be used to form a letterhead at the top of the
My Details			
My Letterhead			
My Consultees		agent agency Agent house	
		Agent Street Agent Ville	
		AĞ3 3NT	
		23/03/11 10:43	
	My Account		
	My Letterhead		
	Contact details to display	✓ Address	•
		Phone Number Mobile Phone Number	
		Fax Number	
		Email Address	
		0 100 0 100	•
	Your logo		Browse
	Alignment of your logo		•
	Alighment of your logo		•
	Alignment of your contact details		•
	* denotes required field		OK

If you click edit you will see this screen.

You can add your company logo, determine its position and amend the address components as appropriate.

2B Agents: Adding clients

The system refers to individual clients as 'consultees'.

You can add consultees at any time by logging in and going to 'my account'.

When registering the system will ask for details of any clients.

You can register as many clients as necessary.

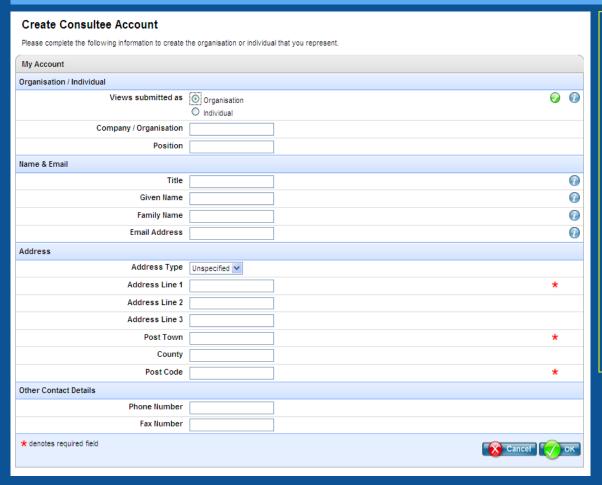


Click here to add clients details

2B Agents: Entering client details

You will need to complete the relevant information for each client.

This allows the system to link the comments you make to the clients you are representing.

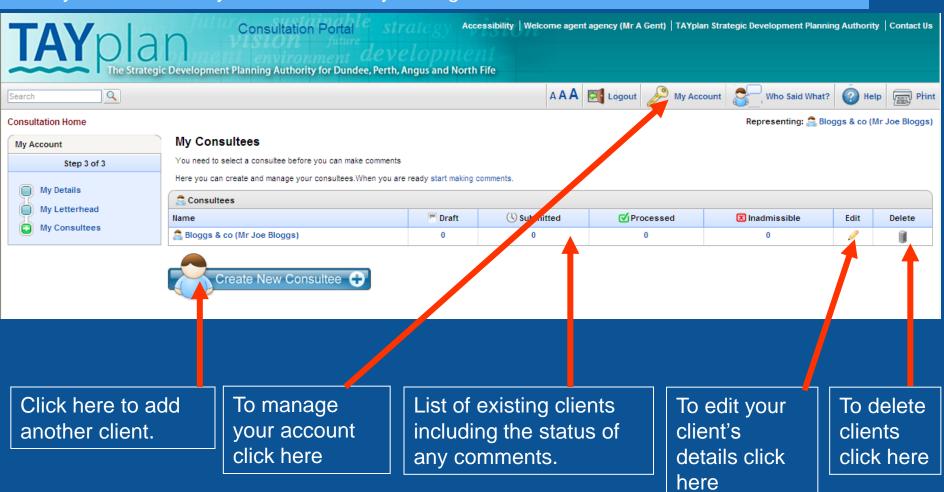


Please Note: Contact data for clients will not be disclosed. But we will publish their name or organisation and the comments you have provided for them.

Contact details for representations made at Proposed Strategic Development Plan stage will be passed to the Scottish Government Directorate for Planning and Environmental Appeals (DPEA). This is because they may need to invite you/your clients to an examination in public on the Proposed Plan to discuss the representation(s) made.

2B Agents: Managing clients details

To manage your clients login and then go to 'My Account' and click on 'My Clients'. The system will show you a list of all of your registered clients like this one.



3. Accessing Live Consultations

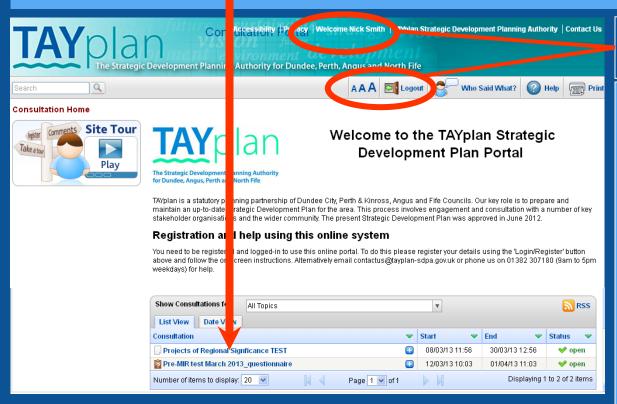
Go to http://tayplan-sdpa-consult.limehouse.co.uk/portal

You will see a screen like this, which includes present and previous consultations. Live consultations say 'open'

Old consultations say 'closed'

To comment on live consultations you MUST login.

Then click on the blue title text.



This tells you that you are logged in

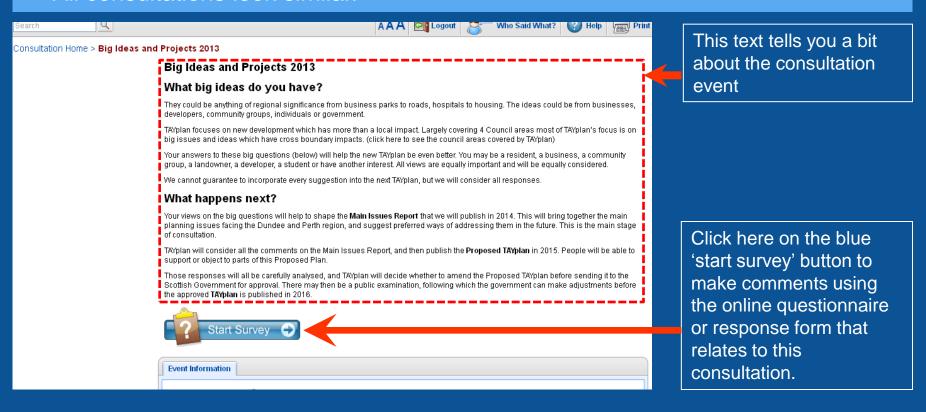
We often run more than one 'consultation event' at the same time; for example Main Issues Report, Strategic Environmental Assessment (SEA) and Equalities Impact Assessment.

Each of these will appear as separate events on the list.

You will need to comment on each separately. You can choose which live consultation events to comment on.

3. Accessing Live Consultations

- When you clicked the blue text for the consultation event you will now see a screen like this (this example is from the Pre-Main Issues Report 2013 consultation).
- All consultations look similar.



4. Making Comments

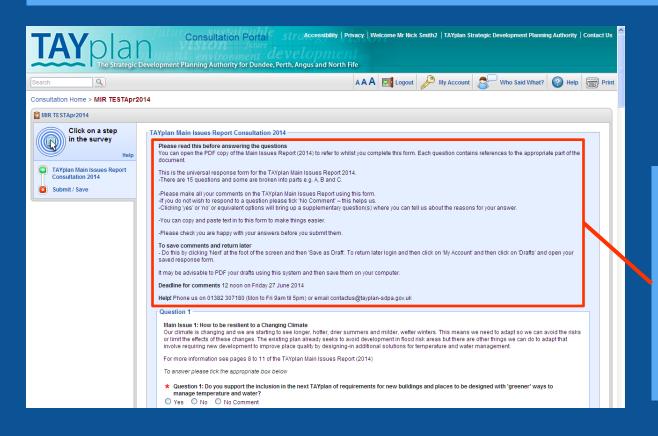
This section shows you how to comment.

- For each consultation we will ask you to complete an online response form or questionnaire.
- These present your response in a way which helps us to analyse all responses quickly and consistently.
- The form will contain a weblink to any relevant documents so you can see them whilst completing the form.
- You can save your response and return later (See section 5).
- Agents can contact their clients with draft responses prior to submitting them.

Response Forms

There are three separate response forms:

- One for the Main Issues Report (2014)
- One for the Strategic Environmental Assessment (SEA) Environmental Report (2014), and,
- One for the Equalities Impact Assessment (2014).



First read the instruction notes.

- This tells you important things about how the response form works.
- It also gives you details for if you need help with any thing.

The Questions

The Questions.

The Main Issues Report has 15 questions.

The Environmental Report has 9 questions.

The Equalities Impact Assessment has 1 question.

Question 1

Main Issue 1: How to be resilient to a Changing Climate

Our climate is changing and we are starting to see longer, hotter, drier summers and milder, wetter winters. This means we need to adapt so we can avoid the risks or limit the effects of these changes. The existing plan already seeks to avoid development in flood risk areas but there are other things we can do to adapt that involve requiring new development to improve place quality by designing-in additional solutions for temperature and water management.

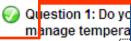
For more information see pages 8 to 11 of the TAYplan Main Issues Report (2014)

To answer please tick the appropriate box below

* Question 1: Do you support the inclusion in the next TAYplan of requirements for new buildings and places to be designed with 'greener' ways to manage temperature and water?

O Yes O No O No Comment

To answer please tick



○ Ye



All questions are compulsory.

- In order to submit you must provide an answer to all questions.
- You will see a green tick when you have answered.

Each Question Has:

- Some explanatory text summarising the Main Issue it relates to.
- A reference to the appropriate place in the document so you can find information.
- A note to help you understand what we need you to do.
- A question specific question.

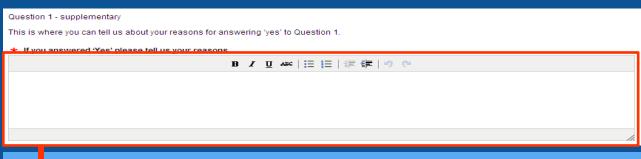
There are 2 Types of Question

 Tick box questions



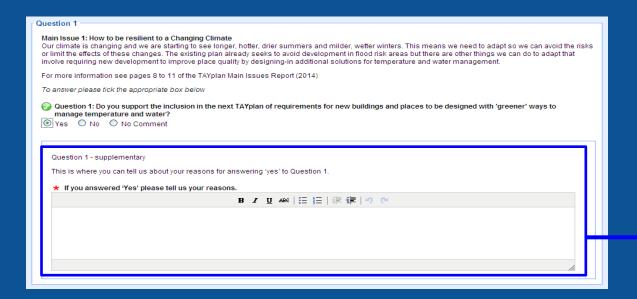
- Most questions have Options Boxes for you to tick (you can only tick one of these).
- If you can't or don't wish to answer click 'No Comment'.

 Lext Questions



- These questions require you to insert text. Usually they ask about your reasons for choosing a tick box answer.
- You can copy and paste text in if you need to.
- If you can't or don't wish to answer a text question then type
 'No Comment' in the space.

Supplementary Questions



All questions are compulsory.

- If you tick 'yes' or 'no' answer (or a particular option) a supplementary question(s) will appear.
- This is where you can tell us your reasons for choosing 'yes', 'no' or the option you chose.
- These questions are compulsory too.
- It is helpful here to set out headings if you want to tell us about several things.

Attachments

You can attach documents to your response:

- These should be relevant to your response.
- The appropriate parts of the attachment should be fully referenced and summarised in the answers to the appropriate question.
- Please do <u>NOT</u> write 'see attached' in your response as this does not add clarity.
- Give a brief explanation of what the attachment is.

What can be uploaded:

- PDF format is best although MS Word documents and MS Excel spreadsheets can be attached.
- Only <u>ONE</u> document can be attached. Therefore merge multiple documents into a single one. If you do this it could be helpful to provide a cover sheet saying what is included.
- Please do <u>NOT</u> attach
 Scottish Government
 Policy or legislation,
 instead include the web link.

Naming convention

- Please do <u>NOT</u> call it 'Appendix 1' as there may be lots of responses with 'appendix 1'.
- Please give it a helpful name e.g. Joe Bloggs study for Jane Bloggs Submission.

Tips for speeding things up

Can I copy and paste text into the response form from other files eg MS Word?

- Yes you can.
 - Just follow the normal copy procedures for the text you want to transfer.
 - Then place the cursor where you want the text to go in the online response form and press 'ctrl v' on your key board (this is the key board instruction to paste).

5. Submitting or saving representations

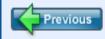
You can submit immediately or save your comments and return later.

When you have completed your representation form you will see the options below at the foot of the screen:

- -save and return later (save as draft)
- -submit comments as final (submit)
- -discard your comments (cancel)



- There are no more questions. Please click Submit to finish and wait for the confirmation message. Once submitted you will no longer be able to modify your answers. Thank you for your time.
- If you are logged in, you can save your form if you are not quite finished and would like to come back to it later. You will be able to see all unsubmitted forms in Your Account' and submit or edit them at any time.
- Cancel if you want to disregard the answers/changes you have made since your last save.

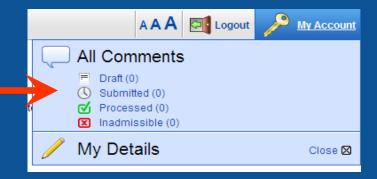






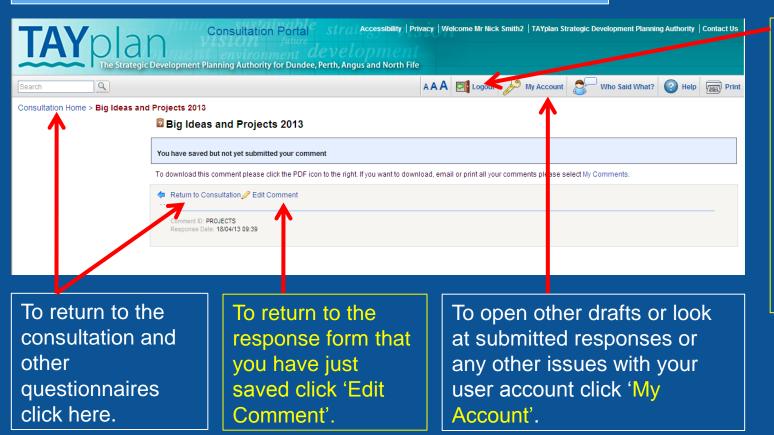
To retrieve saved and submitted comments login and go to 'my account'.

Then click on 'Draft' or 'Submitted'.



If you choose to 'save as draft'

If you choose to save your response before submitting it and return later you should see a screen like this.



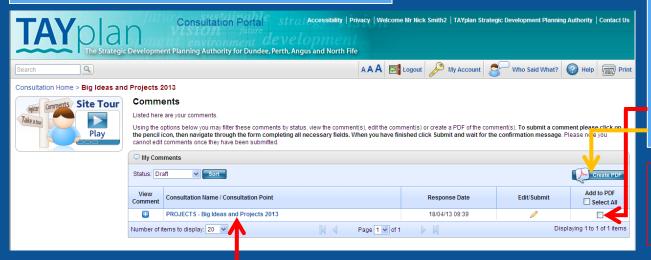
To log out
and return
later click
here. Next
time you will
need to log
back in and
select your
saved
response from
'my account'.

Retrieving saved comments





You should now see a screen like this



Login and then click on 'my account'.

For Saved responses click the 'drafts' part.

To access, edit or submit your draft response you need to open it. To do this click on the pencil symbol.

To print your draft you need to open it (click Edit – the pencil) and click the **print icon** in the top right corner.

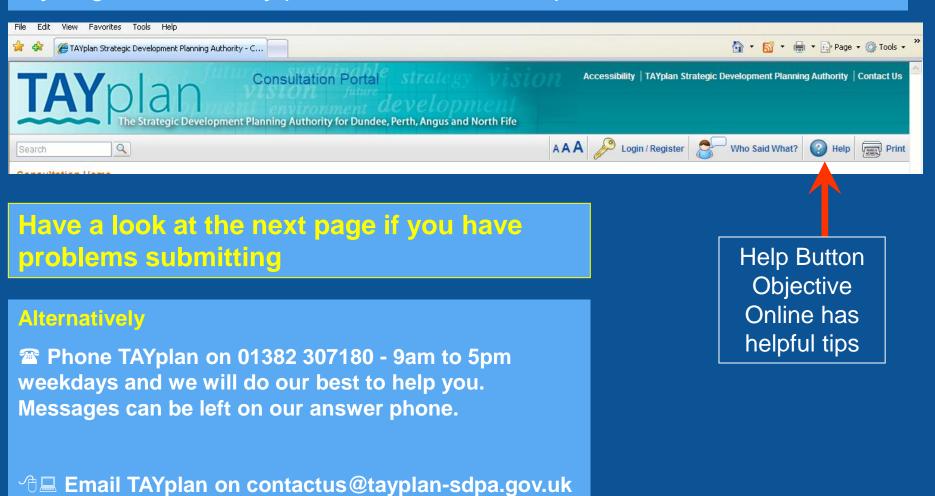
To save the draft to your own computer or email it to others (eg clients) tick this box and then click 'create PDF'.

Do not press print in this screen or it will just print the screen to the left.

This tells you which consultation it relates to

6. Help I'm Stuck...

If you get stuck at any point then click the 'help' button



Problems Submitting?

1.Compulsory questions have not been answered:

- The system will highlight missed questions for you in red. You need to answer these to submit.
- If you don't want to or cannot answer a compulsory question just write 'no comment' so it is clear to us you do not intend providing a response.

2. You have a slow internet connection or an older and slower computer:

- This may mean that the whole process is slowed down. This can be the case particularly if you don't have a broadband internet connection.
- As this is an internet system you can access it from any computer connected to the internet and so it may be possible to access faster public computers/connections elsewhere eg in public libraries.

3. You could be using an old version of your internet browser:

- Some older versions of browsers can be slower than others. Usually you can update your browser over the internet but you will need to check that your operating system and the browser version are compatible.
- As this is an internet system you can access it from any computer and so it may be possible to access faster public computers/connections elsewhere eg in public libraries.

4. Lots of people are submitting responses at the same time:

- This can happen close to the consultation closing date if lots of respondees wait till the end. The best approach is to avoid this with an earlier submission.
- If it does happen to you sit tight and if you are concerned phone TAYplan on 01382 307180 and we can check to make sure it has been received.
 Sometimes the system will take time to process all the responses.

5. I am worried it hasn't submitted:

- •The safest course of action is always to save a copy of your response as a PDF prior to submission (see page 32). If you encounter problems you can also save come back to it later.
- •If problems persist you can use the saved version and copy text etc to a new response. Or you can save your response as a PDF (see page 32) and send it to

contactus@tayplan-sdpa.gov.uk

- •To help us please entitled your email with the name of the consultation eg Main Issues Report 2014.
- •If you do this please phone TAYplan on 01382 307180 so we can make sure to look out for your email.