



# Version 4: Getting Started Guide

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## LOCATION

CS-VUE is accessible online 24/7 at <http://app.csvue.com/>



CS-VUE functions best using Chrome or Firefox internet browsers. **Do not use Internet Explorer.** It is recommended that you set Chrome as your default browser. You can also use Microsoft Edge or Safari.

## INITIAL ACCESS

You will receive an email inviting you to join CS-VUE and you should set your password at this time.

To access CS-VUE and set-up your login password:

1. Click on the link in the email: 'Yes, add me as a user'.

Note: if you have Internet Explorer set as your default browser you will receive an error message. Right click on 'Yes, add me as a user', and copy the hyperlink into Chrome or Firefox, if you do not wish to change your default browser.

2. You will navigate to the following screen, where you will create your password:

Figure 1: Set password



**Passwords must be 10 characters** long and contain a mixture of upper case, lower case, and either a numeric or special character.

3. Enter your password and click on 'SET PASSWORD'.
4. This will navigate you to the login screen.
5. Sign in with your email address and password and click on 'SUBMIT' to log in.

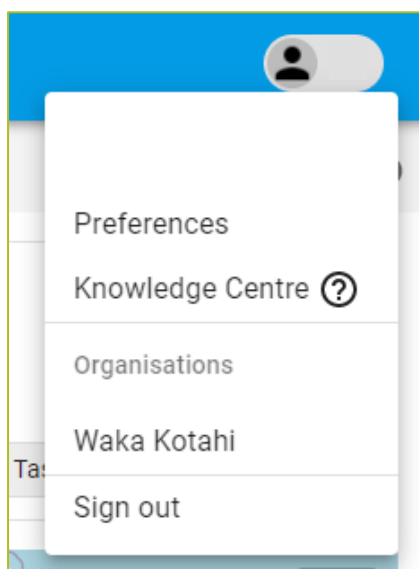
## YOUR ORGANISATION

You choose your organisation the first time you log in, and your preference settings are specific to the organisation you are currently logged into.

### Change your organisation

If you wish to change the organisation you are viewing:

1. Click on your initials located in the top right-hand side of screen to access the user menu.
2. Click to select the organisation you wish to view from the drop-down menu:



*Figure 2: User menu view*

## LOG IN

Log in to CS-VUE each time with your email address and password.

If you forget your password, there is a link on the log in screen that you can use to re-set it.



You can stay logged in for up to 48 hours - even if you are inactive

# HOME PAGE

The first time that you log in you will see a screen similar to Figure 3 below:

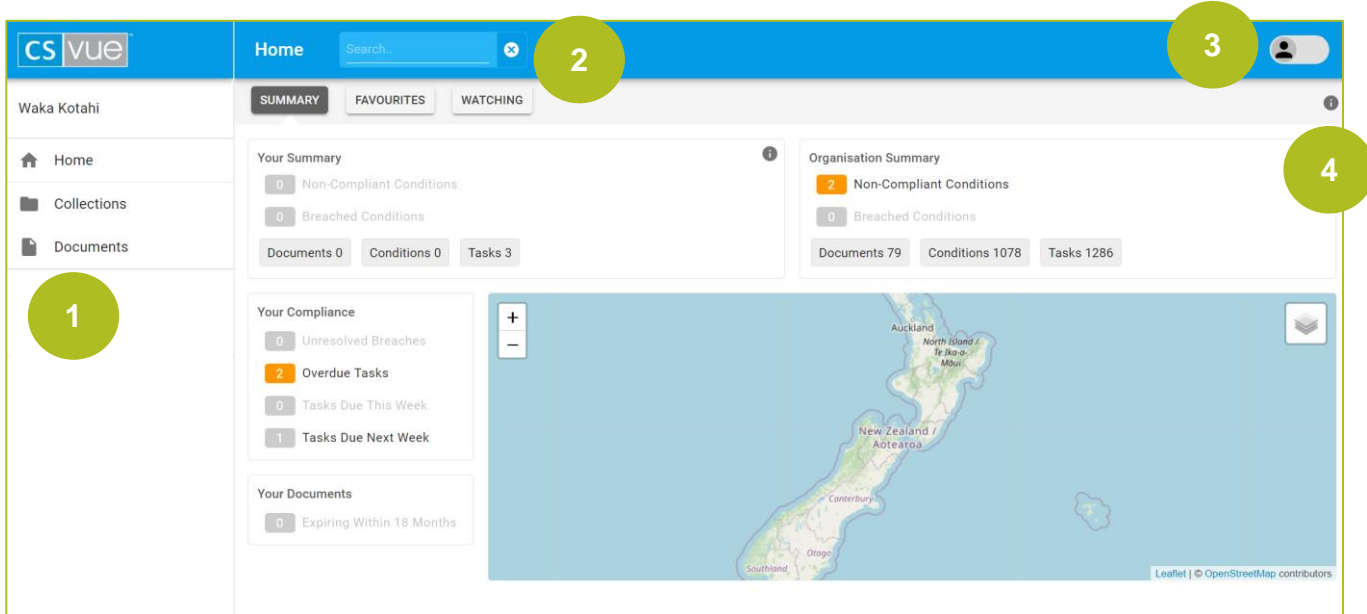


Figure 3: Homepage view

## Features

### 1 Main menu

The main menu is located at the left of the screen. Click on any of the items to open the relevant section. There are some changes in language from Version 3 to Version 4 of CS-VUE:



**Collections** replace Projects  
**Documents** replace Permits

### 2 Search field

The search field is located at the top of the screen. When you type your search term in the box, CS-VUE will look across keywords, tags, owners, holders, grantors, locations and across all documents, collections, tasks and titles.

### 3 Personal preferences and organisation

You can change your personal preferences and organisation by clicking on your initials (user menu) at the top right of the screen. (See the 'Set your preferences' topic for guidance on setting these).

### 4 Tasks and activity panel

The tasks and activity panel display tasks related to whatever you are currently viewing. The panel is accessed by clicking on the 'i' information button on the top right of the screen. You can switch this on and off.

## OWNERSHIP



On the homepage you can only view what you own.

If you own an item you can view, edit or delete it.


You can watch an item if you are not the owner – this means that you will be notified of sign-offs, non-compliance and breaches.

## COLOURS

CS-VUE uses colours to alert you to things to be done:

Conditions	Tasks
White Nothing to be done	Green Completed task or breach task
Grey Something to be done	Not yet due
Orange = NON-COMPLIANT One or more task overdue	Task is overdue <b>Note:</b> Previously this was Red
Red = BREACH One or more unresolved breach(es)	A breach task <b>Note:</b> This is a new feature.

# SET YOUR PREFERENCES

 Preferences are specific to the organisation you are currently logged into.  
You should set your preferences when you log in to CS-VUE for the first time.

You can change your preferences in CS-VUE to customise your home page, summary emails and notifications.

Summary emails will notify you of upcoming tasks, signoffs, non-compliance and breaches of what you own and what you are watching at the frequency and time you choose to set. You can also set what you see on the homepage and the type of notifications you receive.

To set your preferences:

1. Click on your initials (user menu) in the top right-hand corner of the screen.
2. Select 'Preferences' from the drop-down user menu.
3. From within the Preferences selection click on the tabs at the top of the screen:
  - HOME PAGE SUMMARY: change your home page summary
  - SUMMARY EMAIL: change the frequency of your summary emails and what is included
  - NOTIFICATION EMAIL: change your alert notification options.

## Home page summary

You can choose what is displayed on your home page from the options displayed and the time period for lapsing and expiring documents.

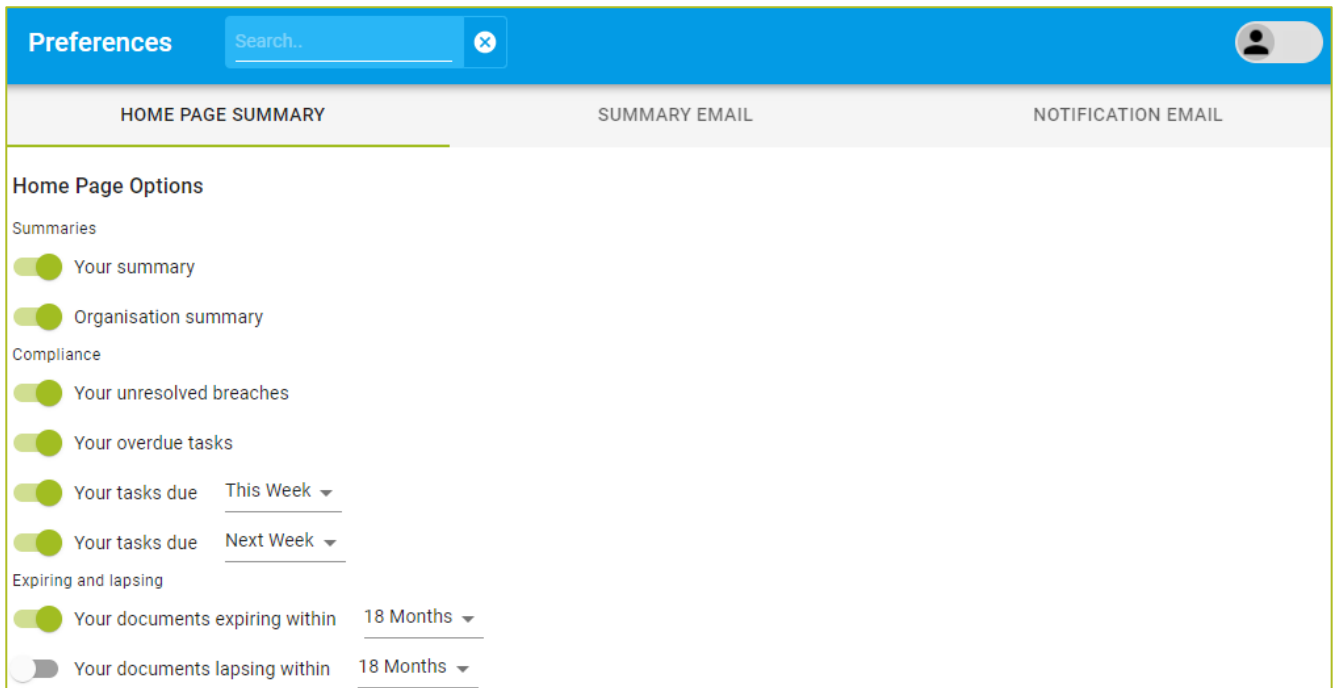


Figure 4: Home page preference options

## Summary email

You can choose to receive a summary email on a regular basis, a particular day of the week, and / or a particular time period.

The default is set for Monday weekly between 08:00 – 10:00.

You can choose what content to include from the options displayed, and the time period for lapsing and expiring documents.

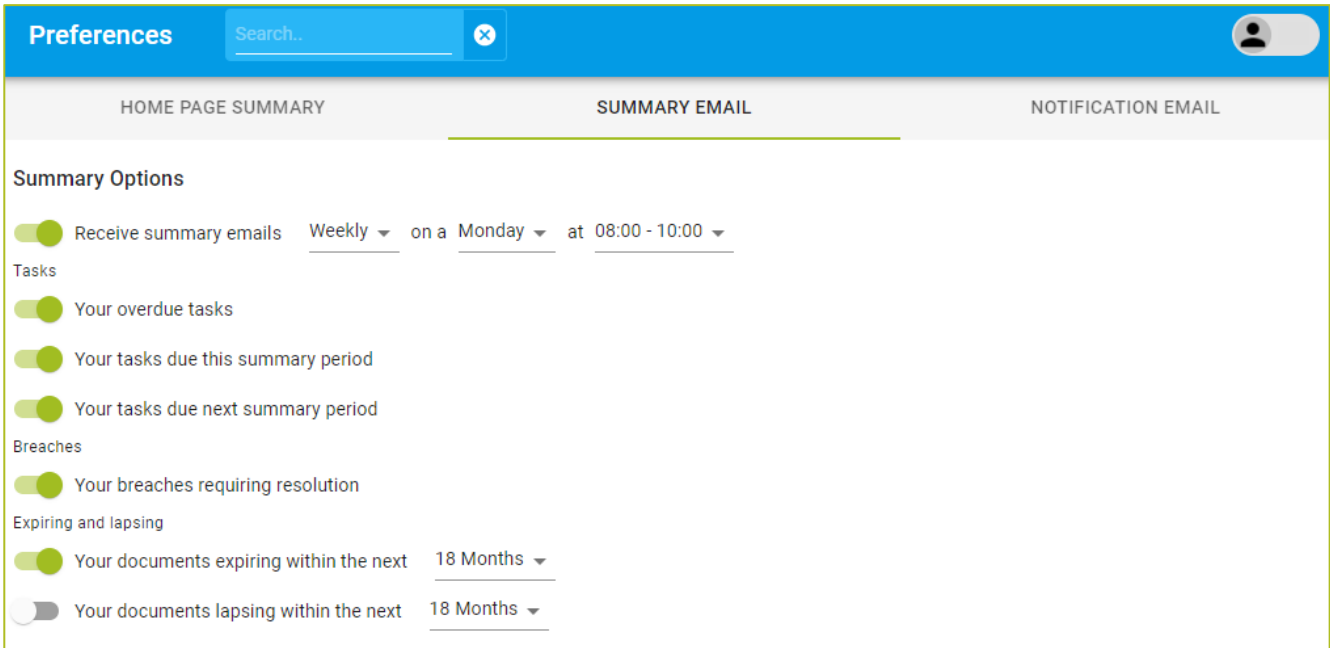



Figure 5: Summary email options

## Notification email

 You will not receive notifications for events that you perform yourself.

You can choose to receive notifications and also to turn them off between the hours 19:00 to 07:00. Any notifications generated during this time are held until 07:00.

You can choose which events interest you, including new breaches, changes to compliance, or new sign-offs.

You will receive notifications where you are the owner of a collection, permit or condition, or you have selected to watch them.

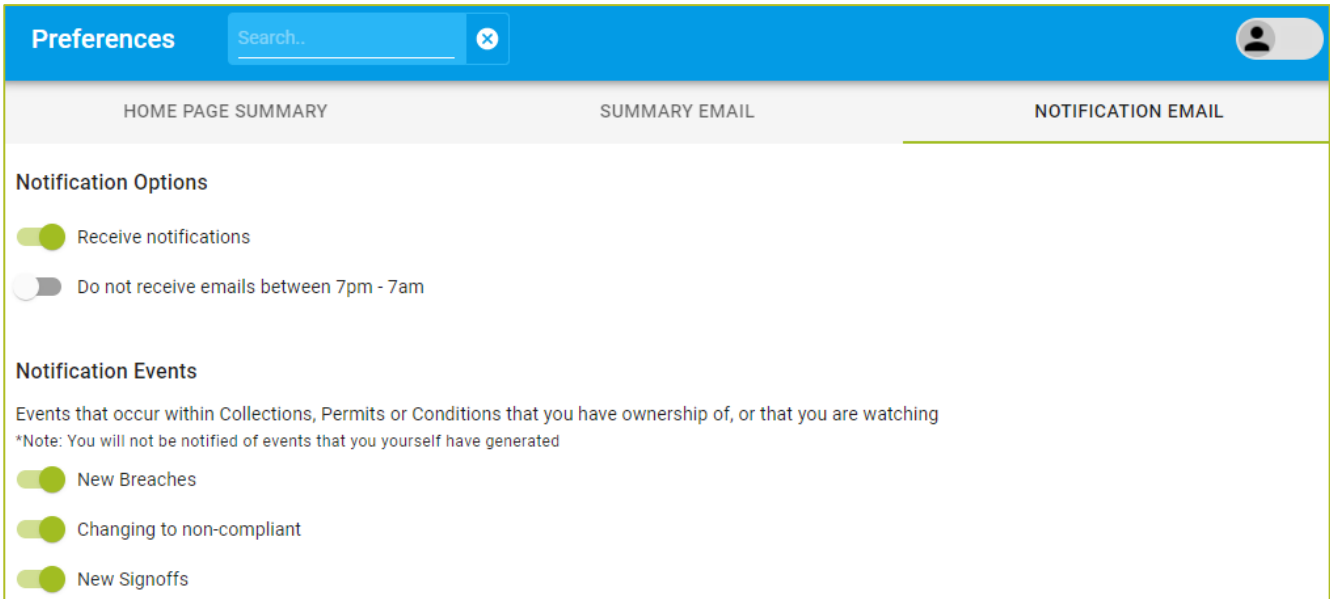


Figure 6: Notification options



# SET UP A COLLECTION

Collections are accessed from the main menu at the left of the screen.

Use Collections to organise your documents into groups such as a project, a grouping of permits that fall under the same activity or even a group of permits that are managed by the same person.

Almost anything in CS-VUE can be grouped into a Collection to view, manage or follow activity.

Collections fall into two types:

1. Collections
2. Saved Searches.

## Collections

Collections are a static list of documents and clauses. Unless explicitly changed they will continue to stay the same.

You can add or remove items from a collection. You can also delete a collection.

## Saved Search

You can initially populate a collection from a search result. Saved searches are a dynamic list of documents and clauses. They are a set of search parameters that cause the list of documents and clauses to change as the items that meet the saved search parameters change.

## Add a Collection from the Collections screen

To add a Collection from the Collections screen:

1. Click on the '+COLLECTION' button at the bottom right of the screen:

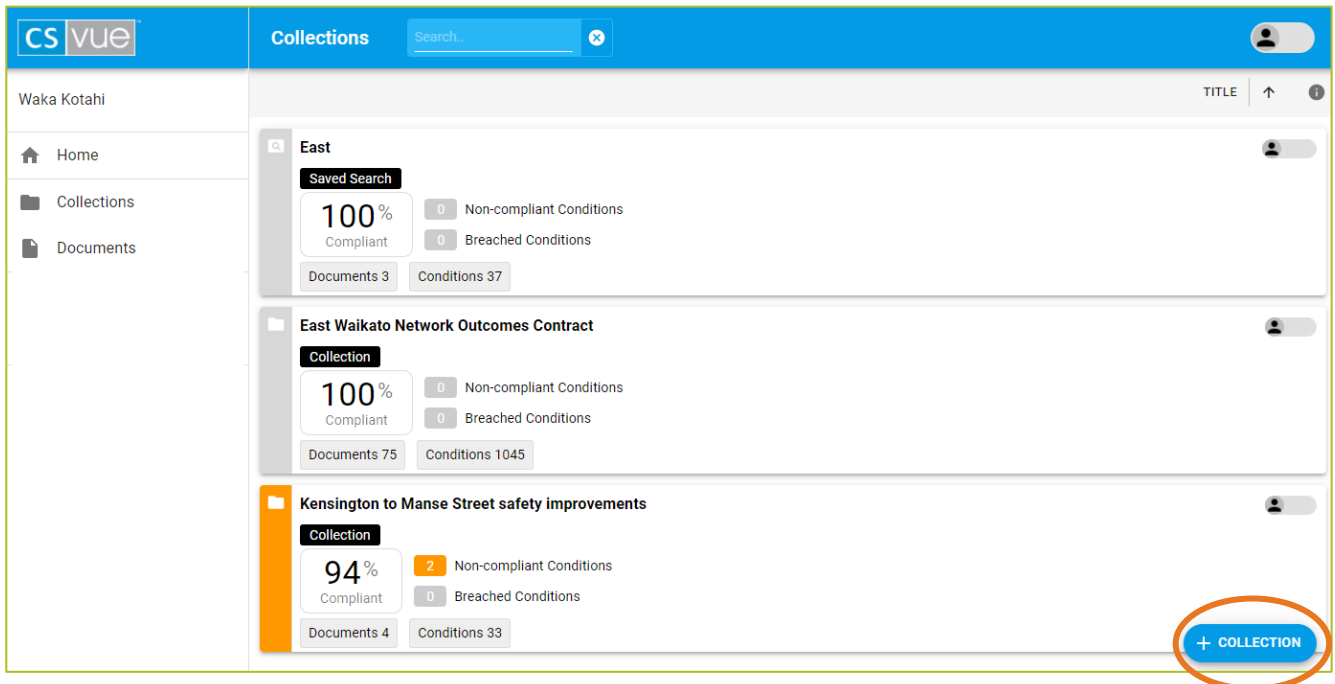


Figure 7: Add a collection using the +Collection button

2. Name the collection and add any relevant tags. Click 'CREATE COLLECTION':

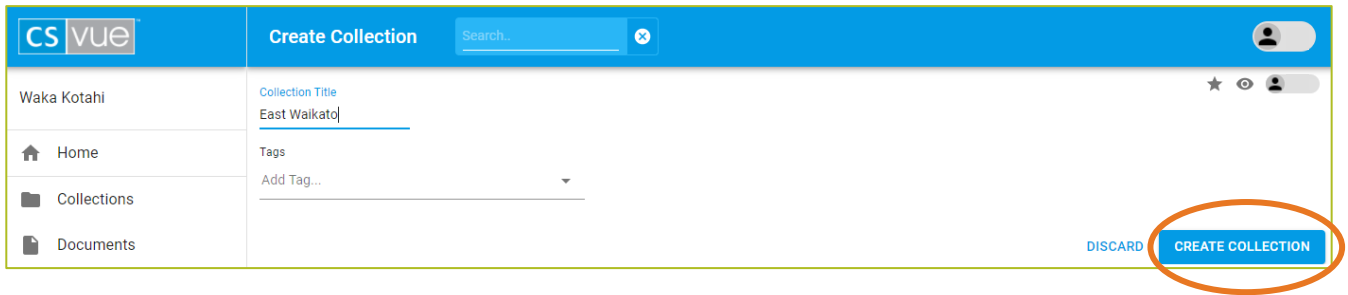


Figure 8: Add a collection title and tags

3. Your saved Collection will be added to your Collections view, as in the following example:

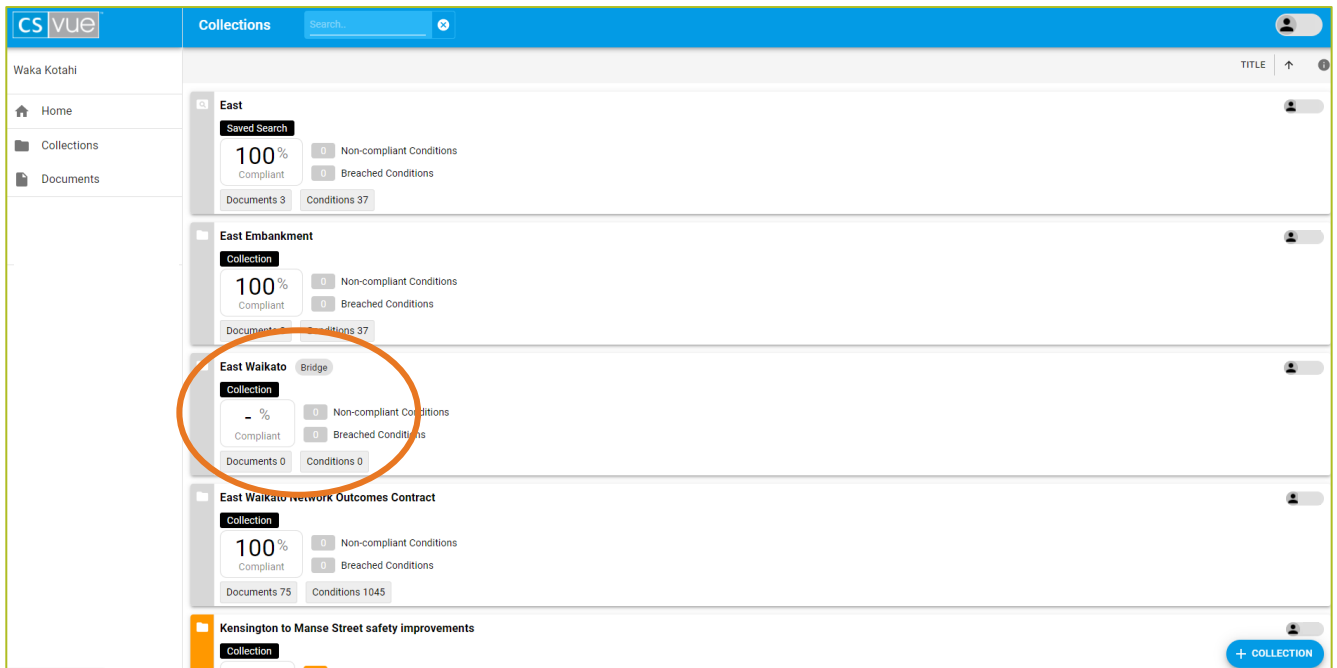


Figure 9: Collection added to Collections view

## Add search results to Collections

To set-up a Collection from a search result:

1. Enter your search criteria in the search field at the top of the screen. The below example uses the search term 'East':

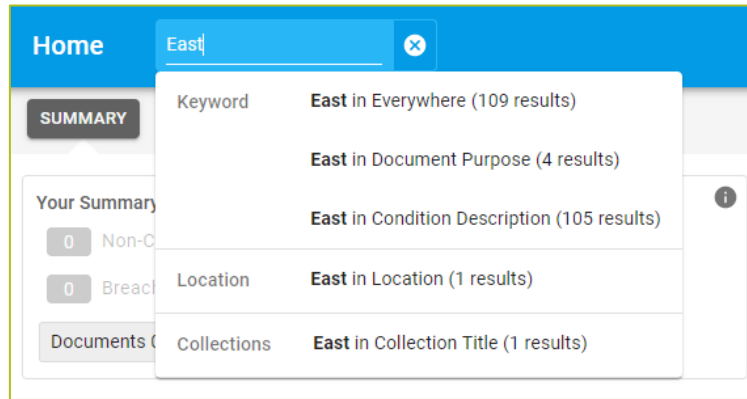


Figure 10: Search results

2. Click to select the relevant search result from the drop-down menu.
3. Once the search results display, click on 'SAVE AS COLLECTION' at the top of the screen:

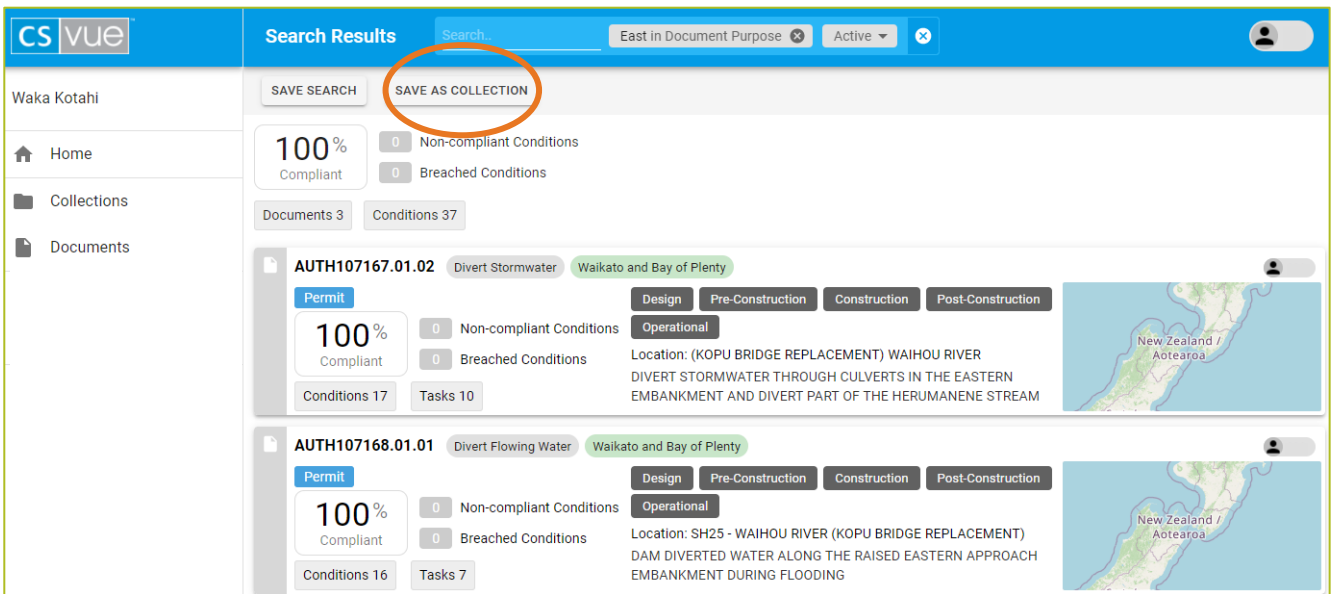


Figure 11: Save as Collection option

4. Enter a title for your Collection and click on 'CREATE COLLECTION'. (Click on the discard button if you do not want to save the Collection):

### Save Collection

Collection Title

---

DISCARD CREATE COLLECTION

Figure 12: Add a Collection title

5. Collection results will display:

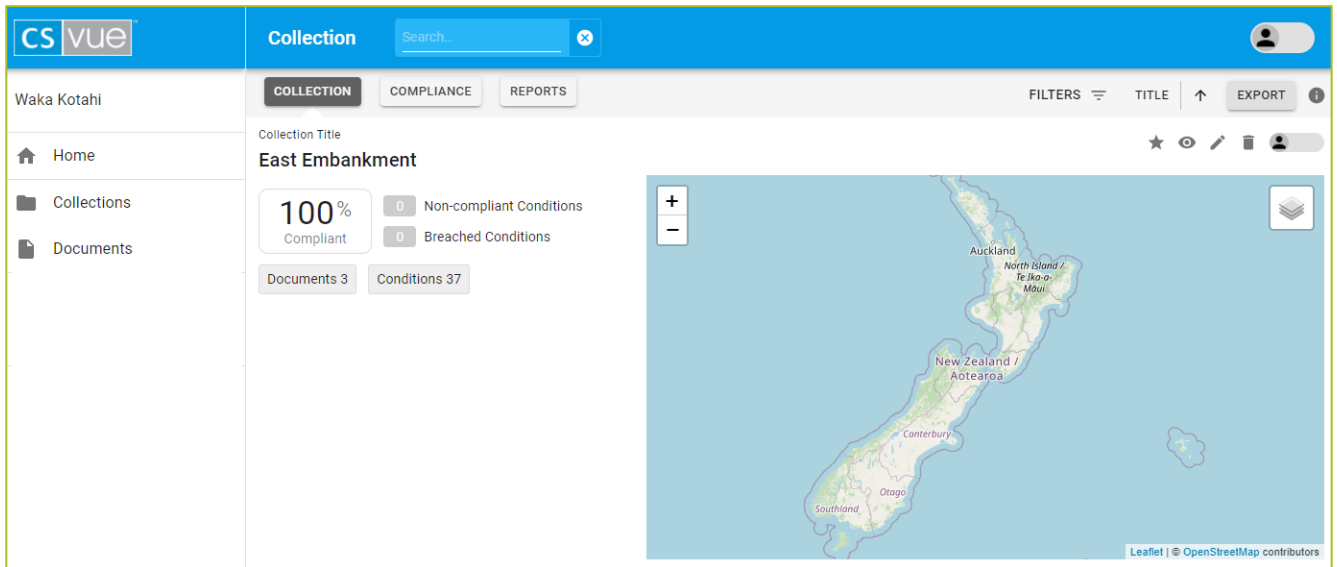


Figure 13: Saved Search results

6. Your saved Collection will be added to your Collections view, as in the following example:

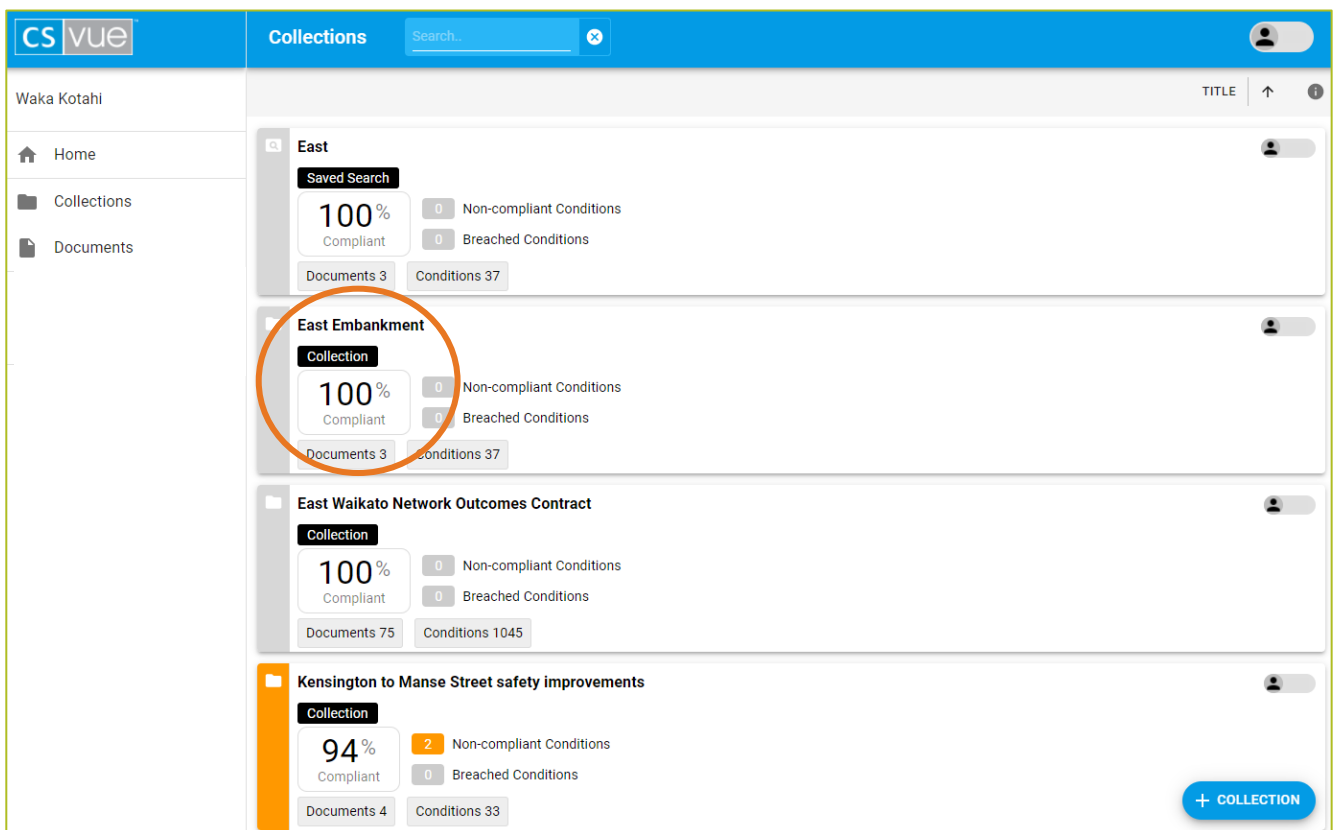


Figure 14: Collection added to Collections view

## Add a Saved Search to Collections

To save specific search results to your Collections:

1. Enter your search criteria in the search field at the top of the screen. The below example uses the search term 'East':

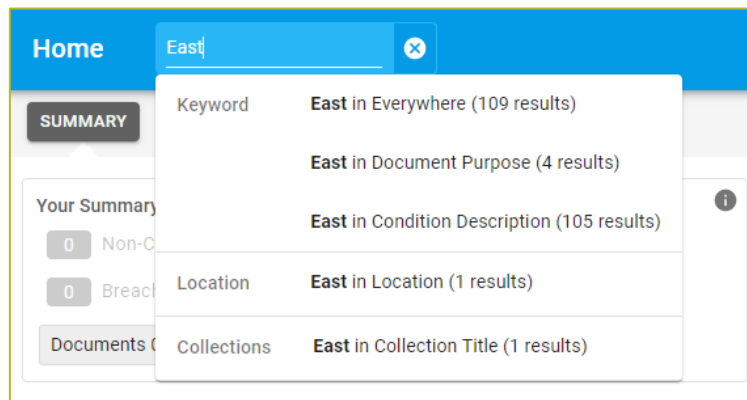


Figure 15: Search results

2. Click to select the relevant search result from the drop-down menu.
3. Once the search results display, click on 'SAVE SEARCH' at the top of the screen:

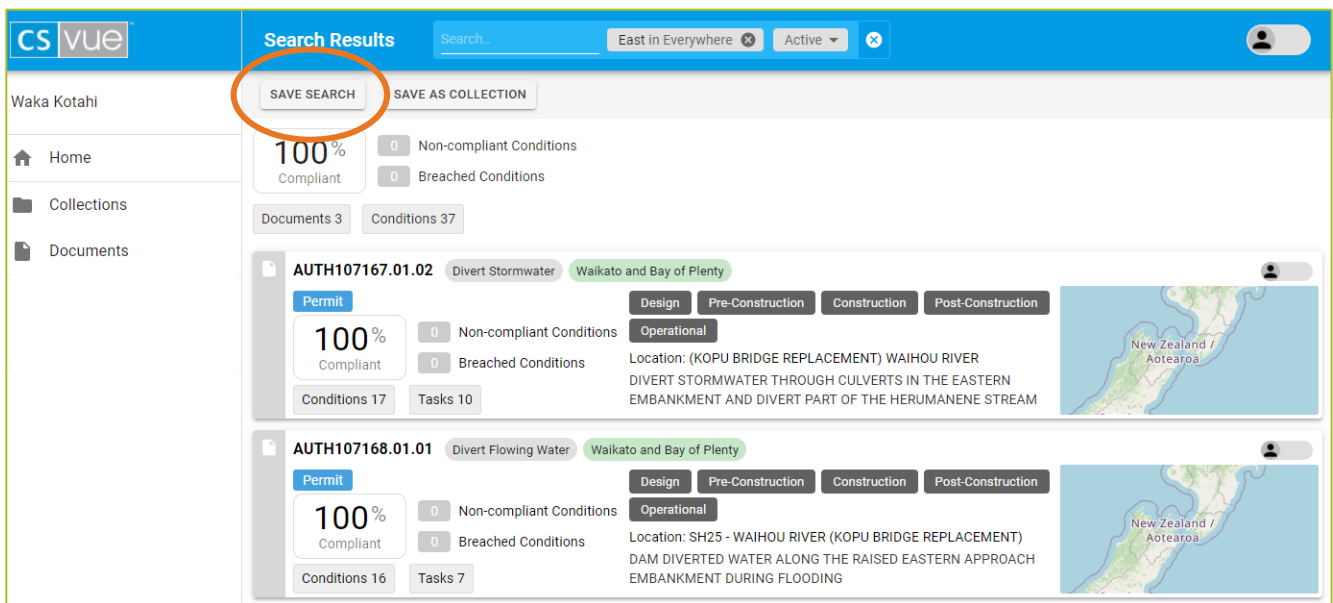


Figure 16: Save Search option

4. Enter a title for your search and click on 'CREATE SAVED SEARCH'. (Click on the discard button if you do not want to save the search):

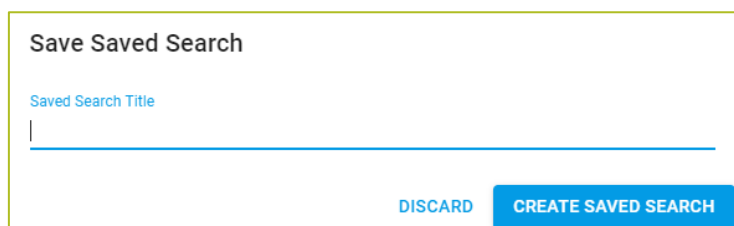
A screenshot of the 'Save Saved Search' dialog box. It features a text input field labeled 'Saved Search Title' with a blue underline. At the bottom right, there are two buttons: 'DISCARD' and 'CREATE SAVED SEARCH'.

Figure 17: Add a Saved Search title

5. Saved Search results will display:

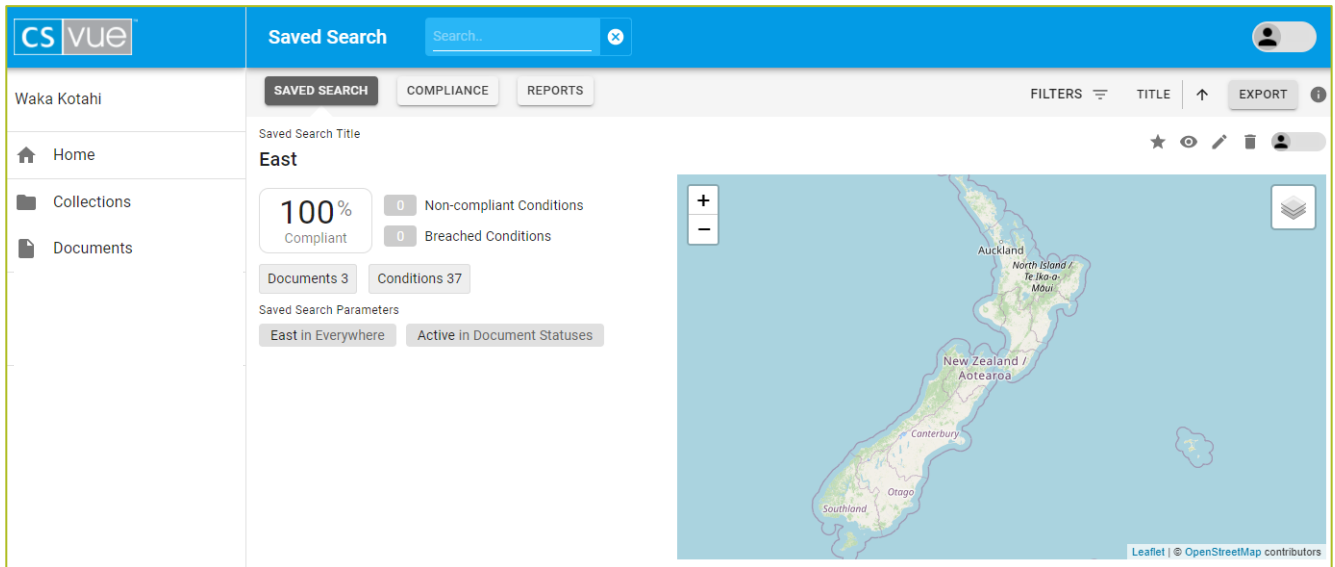


Figure 18: Saved Search results

6. Your saved search will be added to your Collections view, as in the following example:

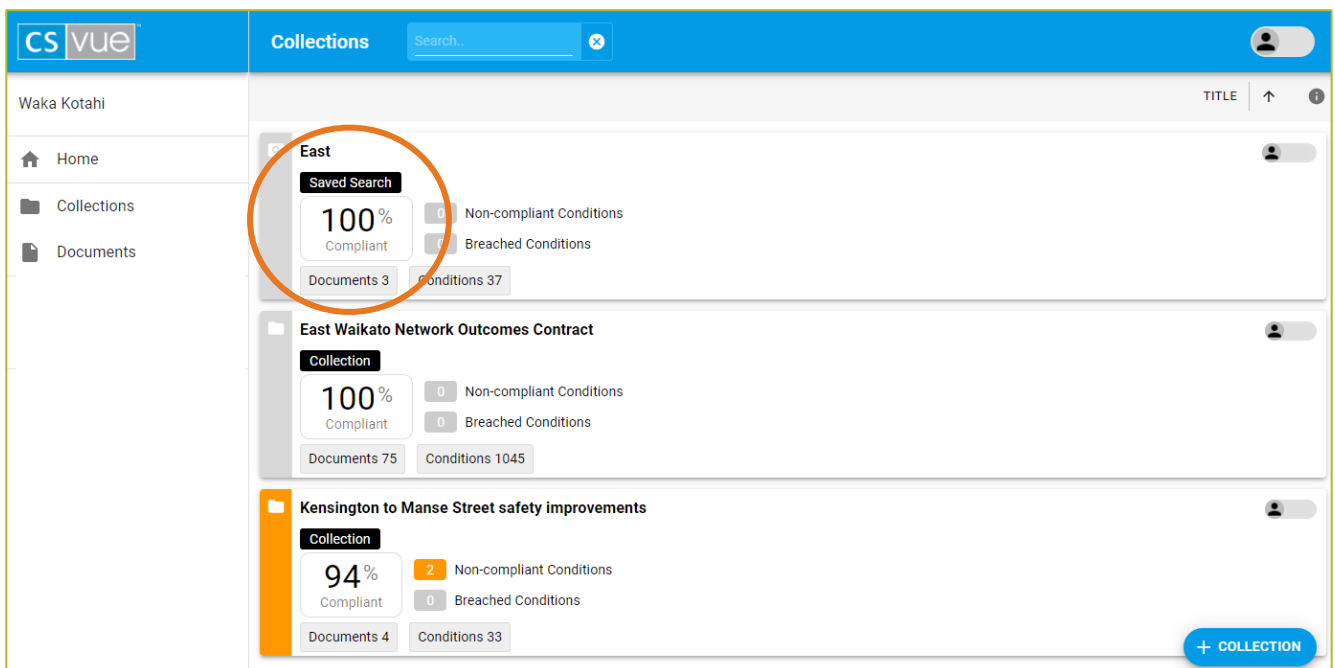


Figure 19: Saved Search results added to Collections view

# WATCH A COLLECTION / PERMIT

You can 'Watch' collections and permits by clicking on the 'Watch Toggle' for the item you are interested in.



If you are watching an item you receive an email within 15 minutes of the item changing, according to your notification settings.

Click on the 'Watch' toggle to turn it on and off.

In the 'Collections' view, the 'Watch' toggle becomes visible when you roll your mouse over the area next to user initials at the right-hand side of each item:

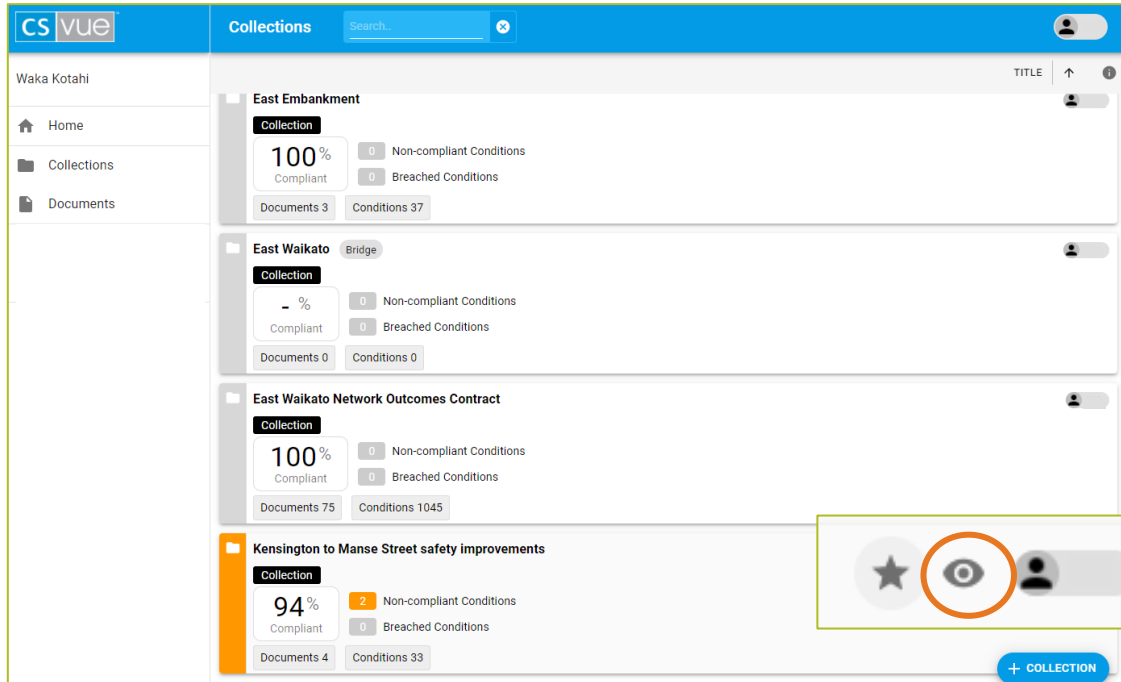


Figure 20: Watch toggle in Collections view

When the 'Watch toggle' is turned on the 'Eye' icon will turn blue, as in the following permit example:

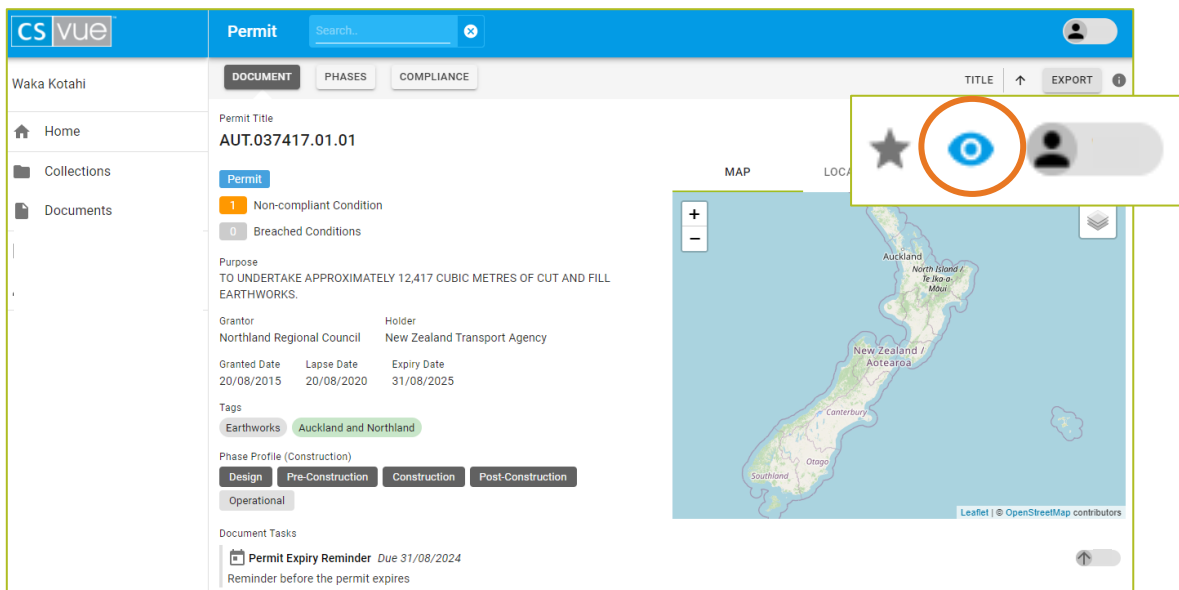


Figure 21: Watch toggle turned on showing in Permit view

Items you are watching are compiled in 'Watched Collections'. This is accessed by clicking on the 'WATCHING' tab on the home screen:

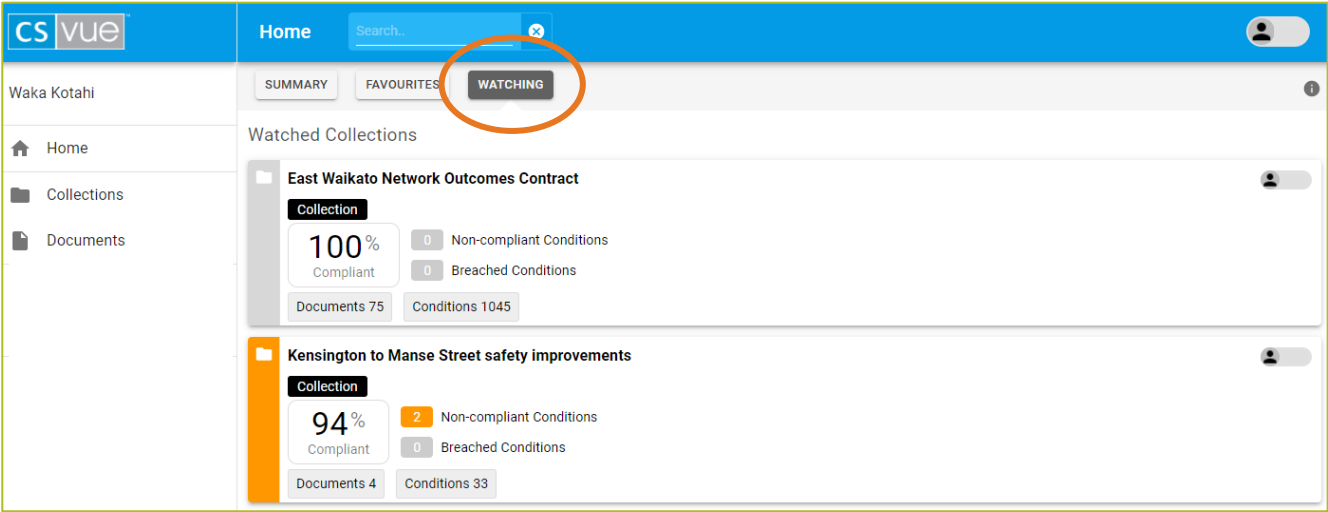


Figure 22: 'Watched Collections' view



# SIGN OFF A TASK



You may sign off a task if you have sign-off permissions.  
When all tasks are signed off, the condition is compliant.

You sign off tasks when completed, with documentation to record that the task is done. This can be done from the 'Tasks view' in the 'Tasks and Activity Panel', or the condition task list.

To access the 'Tasks and Activity Panel' click on the 'i' button on the top right of the view you are in. Within the panel there is a Tasks view and an Activity view. The default sort order is most overdue to least.

To sign off a task from the 'Tasks view':

1. Click the 'Sign Off' button for the task you want to sign off.

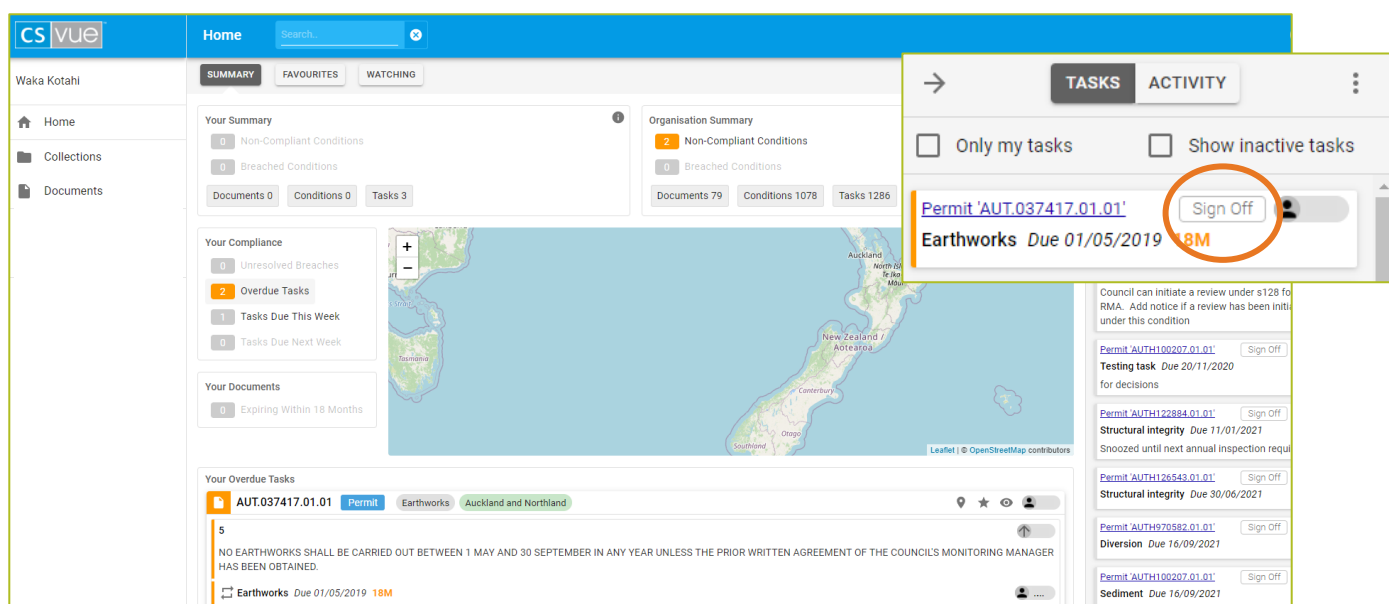


Figure 23: 'Sign Off' button in 'Tasks view'

2. You must select the relevant sign-off date from the options (see figure 24):

- **Sign off now** (this is the default)  
Sign off using today's date. Use this option to skip to the present, ignoring all intervening time periods.
- **Sign off when the task was due**  
Sign off with no non-compliance interval between task becoming due and now. Use this option to document in chronological order.
- **Sign off at:** Sign off on a specific date.  
The default is end of day, but you may select Custom to specify a time. Use this option to document in chronological order, with intervals of non-compliance.

3. Enter a note stating why you are signing off the condition (ensure that sufficient evidence or documentation has been provided so other other users understand how compliance has been achieved with the condition).

**Sign Off**

Task Title  
Council initiated review of consent

Due Date  
Due 10/11/2020

Task Description  
Council can initiate a review under s128 fo the RMA. Add notice if a review has been initiated under this condition

Sign Off Details

Sign off now

Sign off when the task was due

Sign off at

Sign Off Description

**B** *I* U

**ADD ATTACHMENT** **CANCEL SIGN OFF**

Figure 24: 'Sign Off' view

4. You can 'ADD AN ATTACHMENT' to the sign-off record, using the button at the bottom left of the sign-off panel. This is strongly recommended so an audit trail of evidence of compliance is maintained.



PDF attachments are recommended because they open in preview on Chrome, while other documents (particularly \*.doc) must be downloaded first.

5. Click 'CANCEL' if you do not want to sign off the task.
6. Click the 'SIGN-OFF' button to complete the process.



Once you sign off a task, you are unable to undo it.

If you require additional tasks to be created, please email [consents@nzta.govt.nz](mailto:consents@nzta.govt.nz) to have this set up.

## SNOOZE FUNCTION

The 'Snooze' function in Version 3 will no longer be available in Version 4. Request recurring tasks to be set up for those conditions requiring ongoing management by emailing [consents@nzta.govt.nz](mailto:consents@nzta.govt.nz).

## MORE INFORMATION & GUIDANCE

From the online CS-VUE Knowledge Centre you can find out how to use CS-VUE – everything from getting started, through to more in-depth coverage of specific topics.

[CS-VUE Knowledge Centre](#)