Case Alerting

Case alerts can be set up to look for:

- new cases of particular case types and/or characteristics and/or those involving particular (planning) authorities
- changes to specific cases, or types of cases, such issue of a decision or addition of documents to cases

You will be alerted at 2am each day to any relevant changes made on the system the previous day. Please note however that a new alert set up, for example, at any time on Tuesday will only begin alerting you to any relevant changes made on Wednesday i.e. not to any made on the Tuesday.

1. First stage in setting up any type of alert

On the left-hand menu select **Case Alerting Criteria**

DPEA Portal

hide menu

You are here: Home

External CMS Home

Home

Case Alerting Criteria

In the Case Alerting Criteria List click **Add New**

Case Alerting Criteria List						
Description	Frequency Of Alert	Date Last Run	Active	Last Updated By	Last Updated Date	Add New
KS New Highland wind farm PPA & Sect 36	Daily		False	External User Surname	22 Mar 2016	Edit View Delete

In the next screen give a description of what you want alerted about (the description will be included in the email for the alert).

Case Alerting Criteria - Main Details	
Description *	
Active	☑ (check to indicate Active)

Then choose one of the three options below

Specify **Cases**	
Select a set of cases to monitor:	⦿ By Authority, Case Type, Characteristic
	○ Selected/Specified Cases
	○ Bookmarked Cases

Choosing:
- **By Authority, Case Type, Characteristic** allows you to get alerts on **new cases**, and on other criteria such as issue of decisions and submission of documents, for a wide variety of cases defined by the Authorities, Case Types, and/or Characteristics you select
- **Selected/Specified Cases** allows you to get alerts on specific active cases by using our case reference to set up the alert for various changes to the case
- **Bookmarked Cases** allows you to get alerts on some or all of your bookmarked cases, whether or not you set up the bookmark prior to or after setting up the alert (DPEA Portal

External Users' Guidance gives detailed instructions on Bookmarking but the process is basically viewing the case and selecting AddBookmark).

2(a). If By Authority, Case Type, Characteristic is chosen

The next part of the Specify **Cases** screen will look like this, and you can use this part to get alerts on **new cases** being added to the system.

To set up case alerts here you must select at least one Authority, Case Type or Characteristic. If a combination from within these three is chosen then all of the criteria must be met by a case to generate the required alert e.g. if Angus, Planning Permission Appeal and Wind Farm (offshore) are selected and a new Planning Permission Appeal for a Wind Turbine (single) in Angus is received, an alert would not be generated because all three criteria have not been met.
Go to our user guidance for step-by-step instructions on how to create, amend or delete a case alert.

Select **Authorit(ies)** - Click to Show/Hide

Select **Characteristic(s)** - Click to Show/Hide

Select **Case Type(s)** - Click to Show/Hide

You must select at least one Authority, Characteristic or Case Type for an alert here to work.

Expanding on the example given in the message at the top of the screen shown above, if Angus and Planning Permission Appeal had been the only selections in the alert, then the addition of the quoted new case to the system would have generated an alert as both criteria had been met.

If, for example, you click on Select **Authorit(ies)** you will see a list of all the authorities available for selection, and you can choose to Select All Authorities if you wish.

Select **Authorit(ies)** - Click to Show/Hide

Select **All** Authorities: ☑
☑ Aberdeen City
☑ Aberdeenshire
☑ Angus

There is also a Save button in the above. If you did save here and made no other selection you would have set up an alert to get notification of every new case as it is added to the system.

Select **Characteristics** and Select **Case Types** work in the same way, and again selecting all in each of these respectively would alert you to every new case as it is added to the system.

Getting alerts on new cases and changes to groups of cases as defined by the above

If you wish to get alerts on, for example, decisions being issued on cases involving Angus Council you would select Angus in Select **Authorit(ies)** and Issue of Decision Notice in Specify **What to be Alerted About**

Specify **What to be Alerted About**

If you want a simple alert about new cases only, do not select any of the following criteria. If you do select any of the following criteria you will be alerted to new cases and to any of the other changes selected below.

Issue of Decision Notice   ☑ (Check to confirm)
Issue of Intention Notice   ☐ (Check to confirm)

As well as alerting you to decisions being issued regarding Angus Council, it will also alert you to new cases involving the council being added to the system.

Unlike the Authorities, Characteristics, Case Types area, the criteria in Specify **What to be Alerted About** are independent of each other so if multiple criteria are chosen there, only one of them need be met for an alert to be sent. See section 3 for more information and guidance.

2(b). If Selected/Specified Cases is chosen
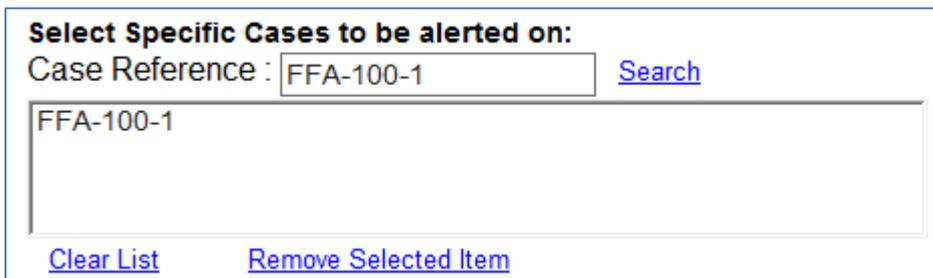
The next part of the Specify **Cases** screen will look like this
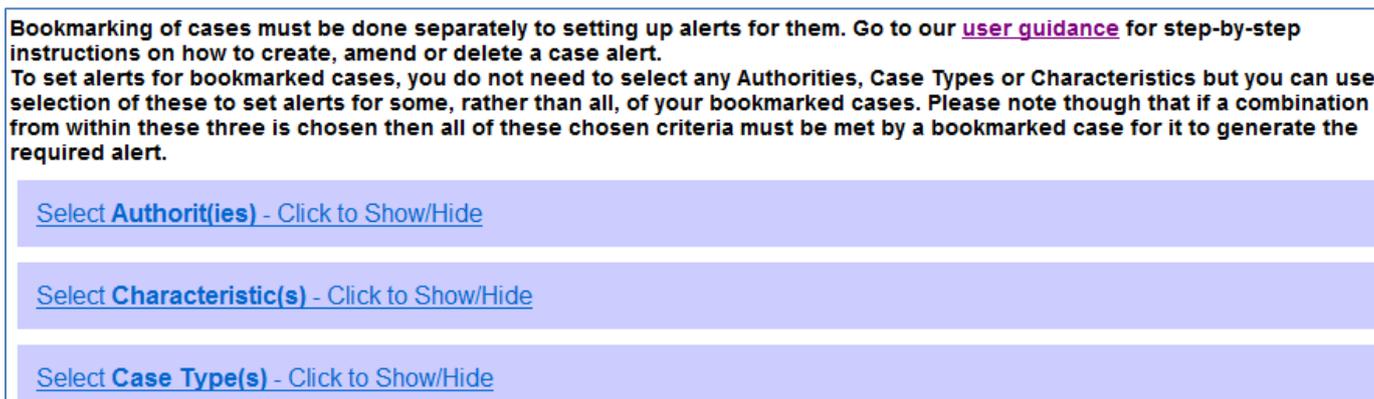

To add cases to the list to be alerted on, enter our case reference in the smaller box and click Search. The reference will be added to the (larger) list box and you can repeat the process as necessary. If you enter a reference that doesn't exist, a message will appear below the list box advising that a case with that reference cannot be found.

You can remove a case from the list by clicking on its reference in the list box and then clicking Remove Selected Item.

You then need to choose your criteria in Specify **What to be Alerted About**, see section 3 for more information and guidance.

2(c). If Bookmarked Cases is chosen

The next part of the Specify **Cases** screen will look like this

For bookmarked cases alerts you should not select any of the above if you want the same alert for all of your bookmarked cases.

You can however use the above to get an alert for some of your bookmarked cases e.g. if some of your bookmarked cases had the characteristic "Wind Farm (two or more turbines)", then you could use the Select **Characteristics** option to apply the alert to only these cases.

You then need to choose your criteria in Specify **What to be Alerted About**, see section 3 below for more information and guidance

3. The Specifying What to be alerted About section

All the criteria in this area are independent of each other therefore if multiple criteria are chosen here, only one of them need be met for an alert to be sent e.g. if you select the Issue Of Decision Notice and the Issue Of Intention Notice criteria, and an intentions notice but not a decision notice is issued, you will get and alert –and vice versa.

Alerts will be triggered for:
- **Issue of Decision Notice** and **Issue of Intention Notice** if their respective dates are entered on our system. Please note that there is no need to choose these criteria if the **New, or change to, Status** criteria is chosen as the case status is always changed when these dates are entered.

- **New, or change to, Status** if there is a change to a case's status.
- **New, or change to, Linked Cases** if a link is added, or deleted, between one case and another (linking of cases often indicates they are likely to proceed together).
- **New, or change to, Hearing/Inquiry/Pre-examination Meeting/Accompanied Site Inspection** if a new Hearing/Inquiry/Pre-examination Meeting/Accompanied Site Inspection is added and if one of their dates or times is changed

Document Changes

The document changes part of this area defaults to the No Changes option, which is what you should leave it at if you are not interested in tracking the submission of documents.

Selecting the Any Document Changes option will produce alerts for the addition, or removal, of any documents to/from the cases selected for monitory. Considering the large volume of documents that can be added to cases we would suggest you use this option only for individual case monitoring.

Selecting the Selected Changes option opens a further set of options that can be used to filter alerts about documents being added to, or removed from, the system.

The 'Addition or Removal of Documents with Description containing word(s):' box allows you to set a keyword search alert on words within the description/name we give to documents on the system.

The Select **Document Type(s)** and Select **Document Categor(ies)** options, when unhidden, allow you to set alerts for documents of different types or categories being added to, or removed from, the system.

Document Categories equate to the tabs within the documents list for each case, an example of which is shown below

Document Types are a more general classification than Document Categories e.g. Documents, Plans, Agenda etc. and can found in multiple categories. For example an agenda type document could be found under the Pre-examination meeting, Hearing (General) and Inquiry (General) categories/tabs. Therefore if you set an alert such you may get alerted about agendas for all three categories.

If, however, you set an alert for the Hearing (General) category you would get alerts about agendas for hearings but you would also get alerts for other document types that may fit into that category such as Documents, General Correspondence etc.

Please remember though that, as we've said before, all the criteria in this area are independent of each other, therefore if you set an alert for the Hearing (General) category and the Agenda type, only one of these criteria need be met for an alert to be sent i.e. doing so would <u>not</u> narrow the alert down to getting alerted about hearing agendas only.

4. <u>Saving Alerts</u>

There are Save buttons in in various sections of the Case Alerting Criteria dialogue page as well as at the top of it. If your save is unsuccessful an error message, explain what needs to be fixed, will appear at the bottom right of <u>the visible screen</u>.

Specify **What to be Alerted About**	
Issue of Decision Notice	• Description is a mandatory field.

If your save is successful the message saying so will allways appear at the top left of <u>the page</u>.

The record has been successfully saved.

Case Alerting Criteria - Main Details

Description *	example description

Once you have saved your alert you can use the New button to create another alert or the Back button (both top of page) to go back to the Case Alerting Criteria List.

5. <u>Editing, Suspending & Deleting Alerts</u>

You do all of the above from the Case Alerting Criteria List. It lists your alerts in the order they were put on, but you can change the order by sorting on any of the column headers. If, as in the example below, a sort has been applied you can return to the original order by clicking Default Order

Case Alerting Criteria List

						Add New
Description	Frequency Of Alert	Date Last Run	Active	Last Updated By	Last Updated Date	Default Order
example description	Daily	29 Mar 2016	True	ExternalUser Surname	29 Mar 2016	Edit View Delete
PARF Test 13C	Daily	15 Mar 2016	True	ExternalUser Surname	15 Mar 2016	Edit View Delete
bbb - PP can't delete this alert	Daily	14 Mar 2016	False	ExternalUser Surname	14 Mar 2016	Edit View Delete

You can make changes to any of your alerts by clicking on Edit and when in its Case Alerting Criteria dialogue page you can suspend it (temporarily) by taking the tick out of the Active checkbox

Case Alerting Criteria - Main Details

Description *	
Active	☐ (check to indicate Active)

To permanently delete an alert click on Delete. The line for the alert you are deleting will turn yellow and a message requiring confirmation will appear as shown

Please confirm you want to delete this record   Confirm Delete   Cancel Delete

Case Alerting Criteria List

Click on Confirm Delete and "Record Deleted" will then appear in place of the confirm message.