

# Online Faculty System

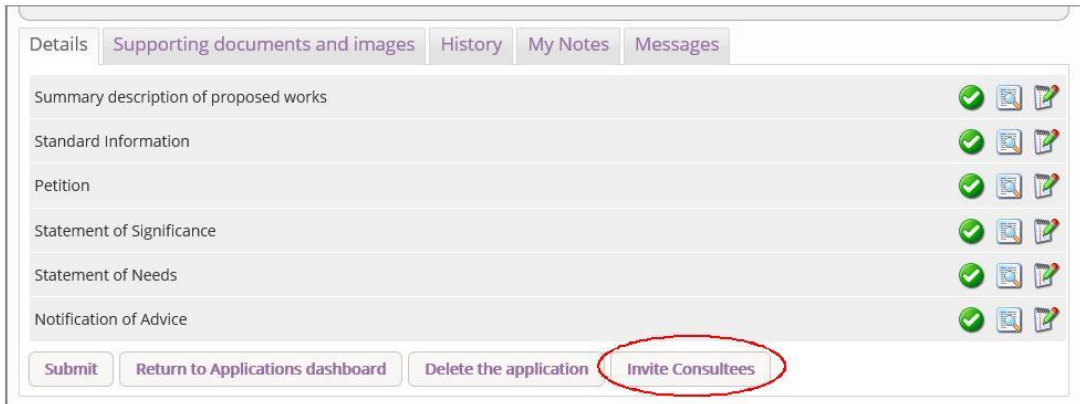
DAC ROLE - INVITING AND MANAGING CONSULTEES

JULIE PATENAUDE

# Invite a Consultee to view an application

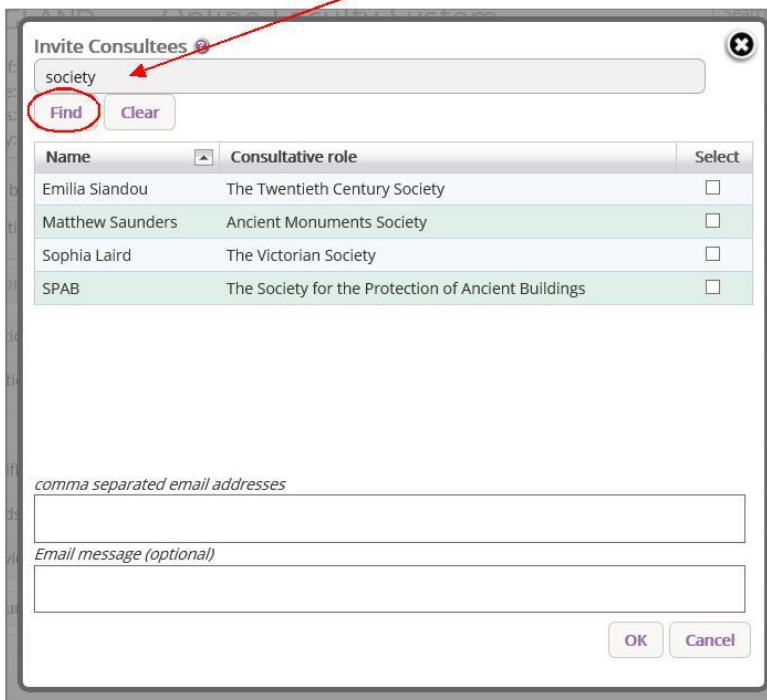
Use the “Invite Consultee” button to send the application to organisations or individuals for comment.

## 1. Click **Invite Consultee**



The screenshot shows a web interface for application details. At the top, there are tabs for 'Details', 'Supporting documents and images', 'History', 'My Notes', and 'Messages'. Below the tabs is a list of application sections: 'Summary description of proposed works', 'Standard Information', 'Petition', 'Statement of Significance', 'Statement of Needs', and 'Notification of Advice'. Each section has a green checkmark icon and a document icon. At the bottom of the page, there are four buttons: 'Submit', 'Return to Applications dashboard', 'Delete the application', and 'Invite Consultees'. The 'Invite Consultees' button is circled in red.

## 2. Search the consultee by **typing in the name or role** into the text box & clicking **FIND**



The screenshot shows a dialog box titled 'Invite Consultees'. At the top, there is a search input field containing the text 'society'. Below the input field are two buttons: 'Find' and 'Clear'. The 'Find' button is circled in red. Below the buttons is a table with the following data:

Name	Consultative role	Select
Emilia Siandou	The Twentieth Century Society	<input type="checkbox"/>
Matthew Saunders	Ancient Monuments Society	<input type="checkbox"/>
Sophia Laird	The Victorian Society	<input type="checkbox"/>
SPAB	The Society for the Protection of Ancient Buildings	<input type="checkbox"/>

Below the table, there are two text input fields. The first is labeled 'comma separated email addresses' and the second is labeled 'Email message (optional)'. At the bottom right of the dialog box, there are two buttons: 'OK' and 'Cancel'.

3. **Select** the consultee you wish to invite
4. Write an optional **message**
5. Click **OK**

**Invite Consultees**

society

Find Clear

Name	Consultative role	Select
Emilia Siandou	The Twentieth Century Society	<input checked="" type="checkbox"/>
Matthew Saunders	Ancient Monuments Society	<input type="checkbox"/>
Sophia Laird	The Victorian Society	<input type="checkbox"/>
SPAB	The Society for the Protection of Ancient Buildings	<input checked="" type="checkbox"/>

comma separated email addresses

Email message (optional)  
DEAR Emilia and SPAB,  
Please look at the documentation.....

OK Cancel

If the individuals or organisations you wish to consult are not available from the list:

1. Type their **email address**
2. **Write** an optional message
3. Click **Ok**

**Invite Consultees**

Find a Consultee, enter search term

Find Clear

Name	Consultative role	Select
consultchurchbuildings	Church Buildings Council	<input type="checkbox"/>
Emilia Siandou	The Twentieth Century Society	<input type="checkbox"/>
FAS Petitioner3		<input type="checkbox"/>
James Darwin	The Georgian Group	<input type="checkbox"/>
JP Consultee		<input type="checkbox"/>
Matthew Saunders	Ancient Monuments Society	<input type="checkbox"/>
Sophia Laird	The Victorian Society	<input type="checkbox"/>
SPAB	The Society for the Protection of Ancient Buildings	<input type="checkbox"/>

comma separated email addresses  
john@gmail.com,sam@hotmail.com

Email message (optional)  
DEAR John & Sam  
Please look at the documentation.....

OK Cancel

# Managing your List of Consultees

Tailor your list of consultees. Choose which organisation or individual(s) applicants can have access to on the Online Faculty System.

1. Go to Applications
2. Find the **TOOLS** tab
3. Click **Manage Consultees**

Signed in as: jp\_dac@esdm.co.uk | Home | Sign Out | My Account | Church Search | Member list | Site Map

THE CHURCH OF ENGLAND Online Faculty System

Search the site

Home Applications Churches Forms Contact Help

Online Faculty System dashboard

From this page you can access active and archived Faculty applications in your diocese and can produce reports to manage your casework. [Read more](#) about the types of work that can be processed using the Online Faculty System or click [here](#) for help.

Click "view" to open a case file or go to "tools" to run a report.

Messages Applications requiring your action Active Cases Archived Cases **Tools**

Manage consultees

DAC meeting report

Casework analytics report

Site Map | Privacy | T & C | © 2014 - 2016 Archbishops' Council | Web site by exeGesIS SDM | Rev. 1.0.6039.25698

4. **Select** which consultee should be **visible to applicants**
5. Click **Save**

Manage Consultees

Back

Name	Consultative role	Visible to Applicant
consultchurchbuildings	Church Buildings Council	<input type="checkbox"/>
Emilia Siandou	The Twentieth Century Society	<input type="checkbox"/>
FAS Petitioner3		<input checked="" type="checkbox"/>
James Darwin	The Georgian Group	<input type="checkbox"/>
Matthew Saunders	Ancient Monuments Society	<input type="checkbox"/>
Sophia Laird	The Victorian Society	<input checked="" type="checkbox"/>
SPAB	The Society for the Protection of Ancient Buildings	<input type="checkbox"/>

Save Cancel

When your applicants attempt to invite a consultee to view their application, they will only see the organisations you want them to see:

**Invite Consultees** [Edit](#)

Find a Consultee, enter search term

[Find](#) [Clear](#)

Name	Consultative role	Select
FAS Petitioner3		<input type="checkbox"/>
Sophia Laird	The Victorian Society	<input type="checkbox"/>

comma separated email addresses [Edit](#)

Email message (optional) [Edit](#)

[OK](#) [Cancel](#)

## Keeping track of who was consulted

There are two ways you can find out who has been consulted for an individual application.

1. Go to the **HISTORY TAB** of an individual application
2. Click **Show All**

From here, you can see when (and who) undertook a consultation.

Application Ref: **2016-003629** Church: **Ambridge: St Stephen's (Test)**  
 Diocese: **Borchester (Test)** Archdeaconry: **Felpersham (Test)**  
 Status: **Awaiting DAC recommendation** Logged By: **The Test Account Parish (Tue 07 Jun 2016)**  
 Summary: **Spiral staircase**

Your proposal has been processed by the DAC and will be reviewed at an upcoming committee meeting.  
 This does not constitute authority for carrying out the works.

[Details](#) [Supporting documents and images](#) [History](#) [My Notes](#) [Messages](#)

Show only status changes  Show all

Who	Action	When
Julie Patenaude	Sent to Consultees	Tue 19 Jul 2016
Darcey Cavendish	Edited Petition - Schedule of works	Tue 19 Jul 2016

**AND**

3. Go to the **MESSAGES TAB** of an individual application
4. **Find the email** entitled “Faculty System: Consultee Invitation”
5. Click **View**

Application Ref: 2016-003629 Church: **Ambridge: St Stephen's (Test)**  
Diocese: **Borchester (Test)** Archdeaconry: **Felpersham (Test)**  
Status: **Awaiting DAC recommendation** Logged By: **The Test Account Parish (Tue 07 Jun 2016)**  
Summary: **Spiral staircase**

Your proposal has been processed by the DAC and will be reviewed at an upcoming committee meeting.  
This does not constitute authority for carrying out the works.

Details Supporting documents and images History My Notes **Messages**

Recipient	Subject	Date sent	
Julie Patenaude	Faculty System: petition ref 2016-003629 is in preparation	Tue 07 Jun 2016	
Julie Patenaude	Faculty System: petition ref 2016-003629 submitted to DAC	Fri 08 Jul 2016	
Julie Patenaude	Faculty System: Consultee invitation	Tue 19 Jul 2016	

This is a record of the email sent to the DAC, which tells you who was consulted, by whom, and when.

**Faculty System: Consultee invitation**

Dear DAC

The following consultees have been invited to view the following Application on the Online Faculty System by Julie Patenaude:

Reference 2016-003629 concerning Ambridge: St Stephen's (Test) (Church Code 647001).

- [jp\\_consultee@esdm.co.uk](mailto:jp_consultee@esdm.co.uk)

Please click [this link](#) to view the full details of the application.

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If you would prefer to receive fewer emails from the Online Faculty System, you can set your email preferences using the [My Account page](#).

If this is your first time using the Online Faculty System, you will need to register in order to access any application.

[Delete](#) [Print](#)