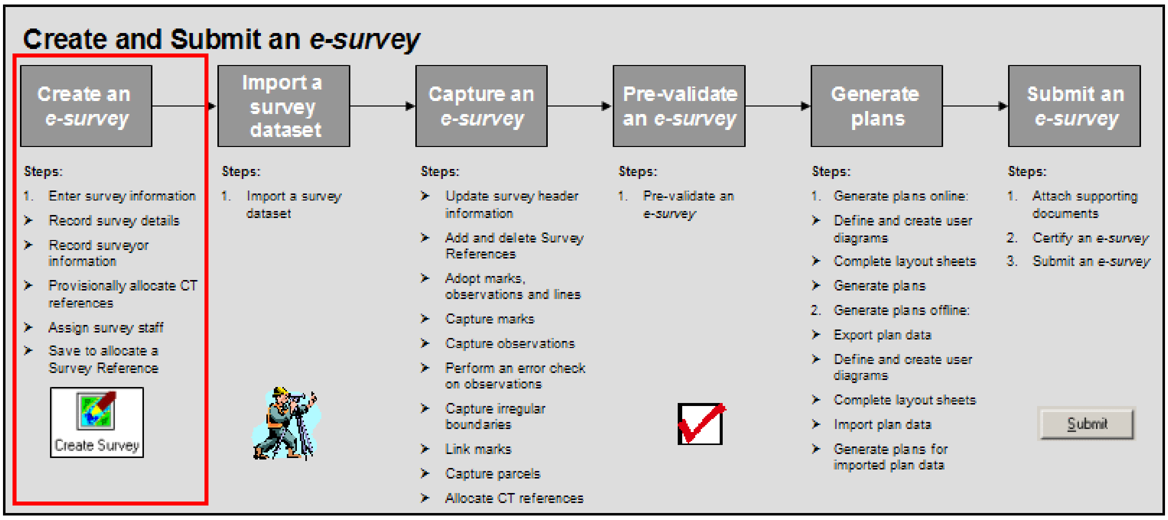
5 CREATE AN *e-survey*

5.1 Overview



When you create an *e-survey*, you record a summary of all details about the survey and Landonline allocates the *e-survey* a Survey Number. A summary of your *e-survey* displays in Workspace.

This chapter explains how to create an *e-survey*. Specifically it describes how to:

- enter survey information using the Manage Survey Transaction screen
- assign survey staff to an *e-survey*
- import a survey dataset

5.2 Enter survey information

Steps:

The steps required to enter survey information are:

1. Display the Manage Survey Transaction screen.
2. Complete the Survey Information tab.

The following headings correspond with these steps and describe them in more detail.

Note: You can only have one *e-survey* open at a time. If an *e-survey* is being worked on, other users will have read only access.

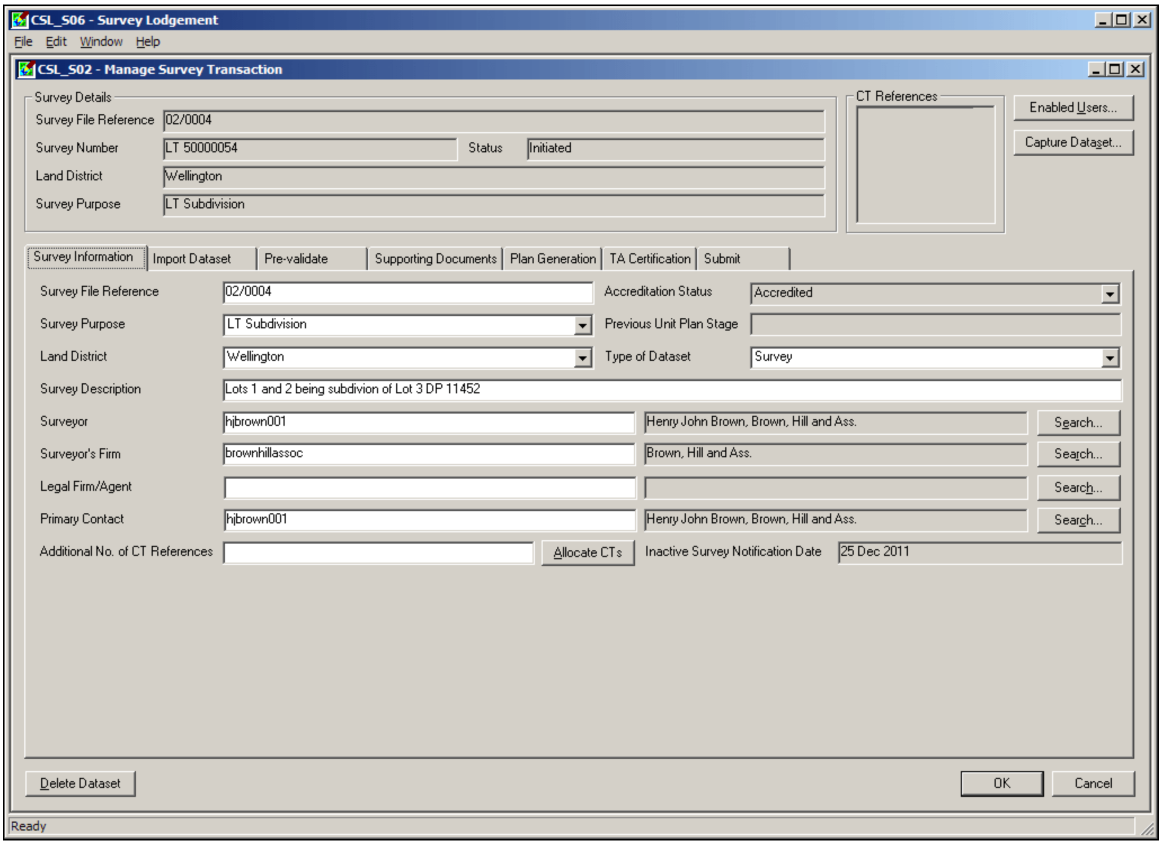
5.2.1 Display the Manage Survey Transaction screen

The purpose of the Manage Survey Transaction screen is to record, manage and submit an *e-survey*.

There are seven tabs on this screen:

- Survey Information:
  Use to record information about an *e-survey*.
- Import Dataset:
  Use to import a XML file of survey data.
- Pre-validate:
  Use to pre-validate an *e-survey* before submitting.
- Supporting Documents:
  Use to attach, edit and view supporting documents for an *e-survey*.
- Plan Generation:
  Use to access Plan Generation to use online or offline and to request layout sheet preparation by batch.
- TA Certification:
  Use to prepare certification packages and to notify a TA an *e-survey* requires certification.
- Submit:
  Use to select submit options, submit an *e-survey* by batch and submit an *e-survey* dataset to LINZ.

Note: Landonline shares information entered in the Manage Survey Transaction screen with the Survey Header screen. If you edit a field in the Survey Header screen common to both screens, the change is reflected in the Manage Survey Transaction screen when it is saved.



Henry Brown has entered and saved the Survey Information for this *e-survey*. The *e-survey* will display in Workspace.

To display the Manage Survey Transaction screen, in Workspace:

1. Click  (Create Survey).

5.2.2 Complete the Survey Information tab

When you create your *e-survey*, you record summary information. Later, while capturing your dataset you can add and edit this information.

Tasks:

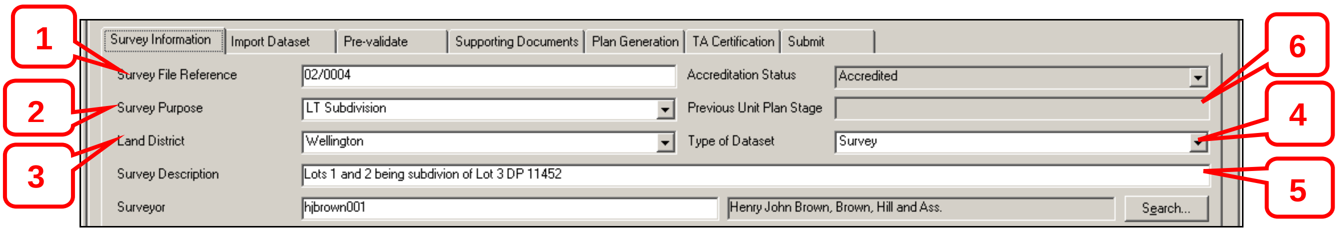
The tasks required to enter survey information are:

- Record survey details.
- Record surveyor information.
- Provisionally allocate CT references.

The following headings correspond with these tasks and describe them in more detail.

5.2.2.1 Record survey details

Survey details are completed when corresponding data is entered into the Survey Information tab.



To enter survey details in the Survey Information tab:

1. Enter a suitable reference in the Survey File Reference field (eg to your office file or job number).
   - The Accreditation Status defaults to Accredited.
2. Enter the Survey Purpose. For more information, refer to **Appendix M: Survey Purpose**.
3. Enter the Land District.
4. Select the Type of Dataset (ie Survey or Parcels without Survey Information).
5. Enter a Survey Description.
6. Enter the plan number in the Previous Unit Plan Stage field if this is a Staged Unit Development Plan that already has stages lodged. Don't include the unit plan suffix.

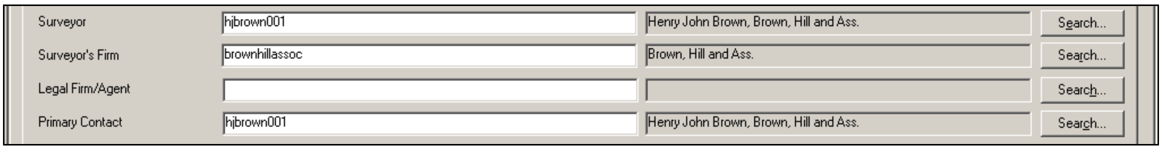
Note: If you later change the **Survey Purpose**, **Land District** or **Type of Dataset** you should pre-validate the *e-survey* before submitting it to ensure it is compliant.

Caution: You can electronically submit a unit plan stage if all previous stages were also electronically submitted.

5.2.2.2 Record surveyor information

When you create an *e-survey*, it displays in the surveyor's My Work folder and All Work folder in Workspace. The Primary Contact will view the *e-survey* in the Supervised Work folder.

The surveyor recorded in the Surveyor field is the signing and submitting surveyor and will receive formal notifications for the *e-survey*.



To enter surveyor information, in the Survey Information tab:

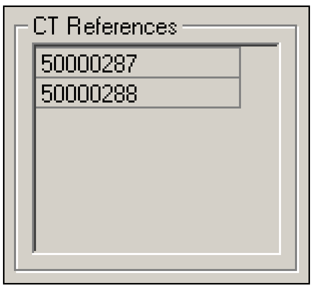
1. Enter the surveyor's Id in the Surveyor field. Click Search... and search for the surveyor if you don't know the surveyor's Id.
   For more information about searching for a user, see chapter **4 Searching for a User or Firm**.
2. Enter the surveyor's firm if this is not already displayed.
3. Enter the Legal Firm/Agent if known. You can complete this field later.
4. Enter the Primary Contact if this is someone other than the surveyor.

Note:

- If you enter a surveyor who does not have a Current Cadastral Survey Licence recorded in Landonline, a message displays. Click OK to continue. If you continue to create the *e-survey* it will be rejected by LINZ unless they receive advice from the Cadastral Surveyor Licensing Board that a current licence exists for the surveyor.
- If you want other staff members to have access to the *e-survey*, you can record their name as enabled users for the *e-survey*. See topic **5.3 Assign survey staff to the *e-survey***.

5.2.2.3 Provisionally allocate CT references

If the *e-survey* requires CT references, you can provisionally allocate these so parcels can be referenced when capturing data.



To provisionally allocate CT references to the *e-survey*, in the Survey Information tab:

1. Enter the number of CT references you require in the Additional No. of CT References field.
    - CT references are automatically allocated when you save the Manage Survey Transaction screen.
2. Select **File | Save** to provisionally allocate the CT References.

To add additional CT references to the *e-survey*:

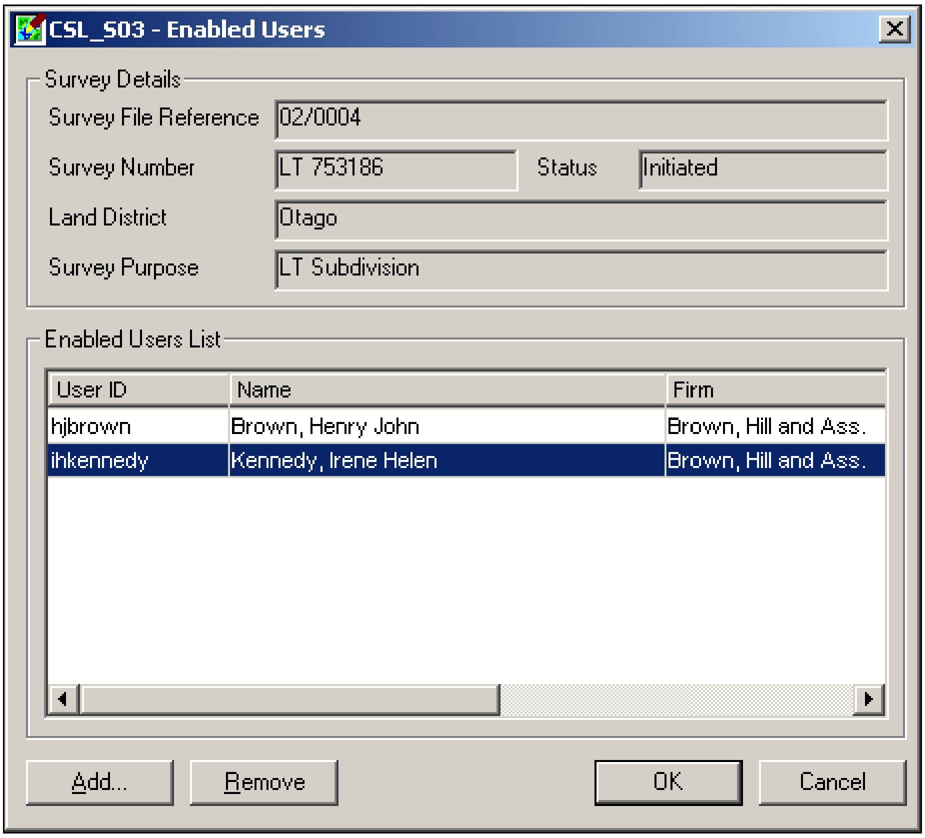
1. Enter the number of CT references you require in the Additional No. of CT References field.
2. Click Allocate CTs. The title reference numbers display in the CT References area.

Note:

- The maximum number of CT references that can be allocated at one time is 99. If you require more, repeat the steps for adding additional CT references.
- When you save an *e-survey* with allocated CT references, or when you add additional CT references, Landonline sends you a Pre-allocation Notice listing the pre-allocated titles for the *e-survey*.
- Landonline also records a future date in the Inactive Survey Notification Date field. If an *e-survey* remains in Workspace after this time without being edited, Landonline sends a reminder notice to advise you to action or delete the *e-survey*. See **Appendix K: *e-survey* notifications**.
- Provisional CT References allocated, but not used, do not need to be deleted.

5.3 Assign survey staff to the *e-survey*

To enable people in the firm, including yourself, to work on the *e-survey* you must add them as enabled users. Once added, the *e-survey* will display in their My Work folder in Workspace. The level of access to an *e-survey* for each enabled user is determined by their user privileges.



Henry Brown has added Irene Kennedy, a technician in his firm, as an enabled user for this *e-survey*.

To assign survey staff to the Enabled Users List, in the Manage Survey Transaction screen:

1. Select File | Save to save if a survey number has not been allocated.
2. Click Enabled Users... to display the Enabled Users screen.
3. Click Add... to display the External Search screen.
   - Search for and select the user you require to return to the Enabled Users screen. The selected user has been added to the Enabled Users List.
   - Repeat this step to add another user to the list if required.
4. Click OK to save and return to the Manage Survey Transaction screen.

To remove survey staff from the enabled users list:

1. Select the name and click Remove
   This user cannot access the *e-survey*, however, they can still view the survey information details in Workspace.

Note: If you change the name of the surveyor, you must record the name of the new surveyor as an enabled user, and if required, delete the previous surveyor's name. You can maintain enabled users at any time until you submit the *e-survey*.