

Ideas, solutions, suggestions, hints and procedures from this document are the intellectual property of Idox Software Ltd and thus protected by copyright. They may not be reproduced, transmitted to third parties or used in any form for commercial purposes without the express permission of Idox Software Ltd.
ID.042.0719
Idox Public Access 3.2 For Scottish Building Standards July 2019



# **Contents**

Introduction
User Details
Registration
Log In
Forgotten password
Log out
My Profile
Profile details
Saved searches
Tracked applications
Notified applications
Apply Online
Searching
Simple Search
Advanced Search
Weekly/Monthly Lists Search
Property Search
Address search
A to Z Street search
Map Search
Map measurement
Saving map searches
Accessing Cases Directly
Search Results
Saving A Search
Record Details
Details
Certificates
Related Items
Map
Tracking Applications
Sharing On Social Media
Share via email
Share via Twitter



# Introduction

The Idox Public Access For Scottish Building Standards website has been designed to provide an efficient and easy-to-use process for members of the public to search for and track applications for building standards warrants and notices.

This document describes how to use the site.



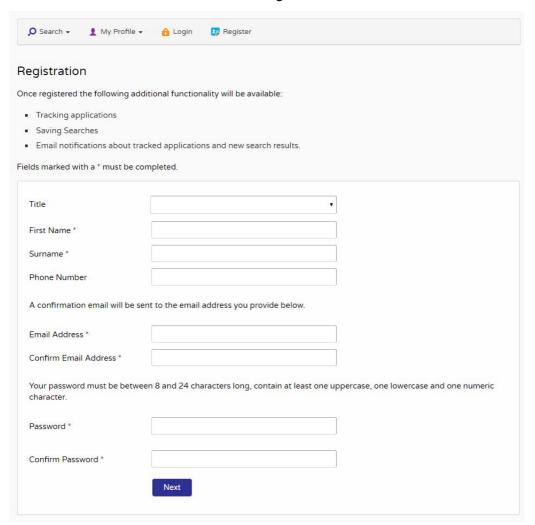
# **User Details**

Anyone can use the Idox Public Access site but to take advantage of the advanced profile features you must first register a user account.

# Registration

Anyone can use the Idox Public Access site, but to take advantage of the advanced profile features you must first register a user account.

1 To create a new user account click on Register in the menu bar.

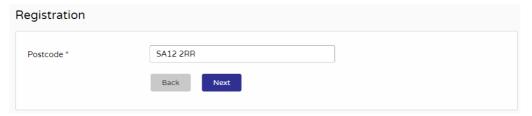


- 2 Register your personal details by filling in the following fields:
  - Title select the title you wish to be addressed by.
  - First Name enter your first name.
  - Surname enter your surname.
  - Email Address enter your email address. Enter it again to confirm that it is correct.
  - Password enter a password that will allow only you to access your account.

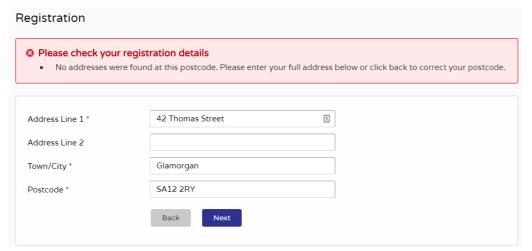


Note Passwords must be between eight and 24 characters, must contain an upper case letter, lower case letter and number and must not contain spaces. Enter the password again below to confirm that it is correct.

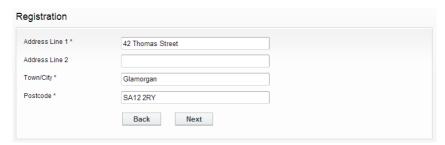
- 3 Click on Next.
- 4 Enter your Postcode, then press Next.



5 Select your address from the drop down list, then click on Next.



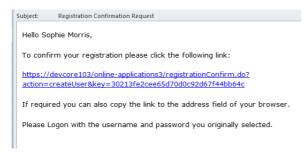
- 6 If your address is not listed, select **My address is not in the list** and click on Next.
- 7 Enter your address details in the appropriate fields, then click on Next.



- 8 Click to read the Terms and Conditions that apply to the use of the site. When you have done so, tick the check box to indicate that you agree to them.
- 9 Read the Your Data section to understand what personal data Public Access uses and why. When you have done so, tick the check box to indicate that you agree to them.
- 10 Check that your personal and login details are correct. To register them, click on the Next button.



11 An email will be sent to the address you entered. This provides final confirmation that you have completed registration and want to create an Idox Public Access account. When the email arrives, click on the link to be returned to the Idox Public Access site.





## Log In

In order to use the full range of features offered by Idox Public Access you need to log in to the site using the user name and password you provided when you registered your account.

- 1 Click on Login on the home page.
- 2 Enter your user name and password, then click on the Login button.

#### Forgotten password

- 1 If you forget your password, click on the **Forgotten password?** link.
- 2 Enter your email address and then enter a new password twice. Press the **Change Password** button.
- 3 A confirmation email will be sent to your email address. When it arrives, click on the confirmation link. You will now be able to log in with your new password.

### Log out

When you are finished using Idox Public Access, remember to log out by clicking on the Logout button in the menu bar.



### **My Profile**

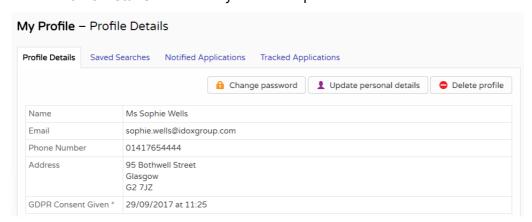
Once your account has been created you can access your My Profile area. This area allows you to configure your personal details as well as manage your searches and applications.

- Profile Details your full personal details
- Saved Searches a list of searches which you have saved
- Notified Applications notifications for applications that you are tracking, or are the subject
  of saved searches, have been modified
- Tracked Applications a list of applications that you have elected to track
- **Form Submissions** (with Idox Scottish Building Standards E2E Online Forms) a list of draft and submitted forms (see Form Submission).

#### **Profile details**

The Profile Details pages allow you to view and update your account details as well as view how your data is used by Public Access.

1 Select **Profile Details** from the My Profile drop down list in the menu bar.



The Personal Details page allows you to view the details you registered with. You can change any of those details or update your password.

- 2 To update your password click on **Change Password**.
- 3 Enter your email address and then enter a new password twice.
- 4 Press the **Change Password button**. A confirmation email will be sent to your email address. When it arrives, click on the confirmation link. You will now be able to log in with your new password.
- 5 To change your details click on **Update Personal Details**. Alter your details as required, clicking on the Next button to page through the sections.
- 6 When you no longer wish to use Idox Public Access, click on **Delete Profile**.

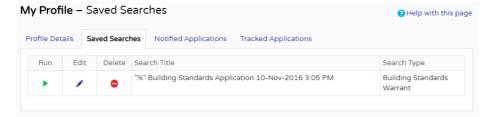


#### Saved searches

The primary activity on the Idox Public Access site is to perform searches for information. Searches that will be performed frequently can be saved so that they may be repeated easily as often as you like (see "Searching" on page 15).

Any changes to the status of applications previously found by your search criteria or any new applications which match the criteria of a saved search will trigger a notification. Notifications are listed in the Notified Applications page.

1 To view your saved searches, select **Saved Searches** from the My Profile drop down list.



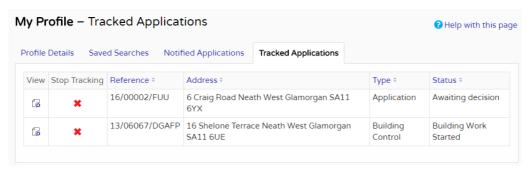
- 2 You can sort the list by clicking on the appropriate column headings:
  - Search Title sort the list alphabetically by search title.
  - Search Type sort the list alphabetically by search type.
- 3 To perform a saved search now, click on the **Run** button for that search.
  - Note Circular map searches cannot be run from the Saved Searches page.
- 4 To modify the search criteria, click on the **Edit** button for that search. This returns you to the appropriate search form and allows you to change the details of the search.
- 5 To remove a search from the list, click on the **Delete** button for that search.



### **Tracked applications**

After locating an application of interest by searching, you can choose to keep a watch on what happens to it by tracking it. Applications are displayed on the Tracked Applications page. When applications that you are tracking are modified, for example, its status changes or a comment has been made, a notification will appear on the Notified Applications page and you will be sent a notification email.

1 To view these applications, select **Tracked Applications** from the My Profile drop down list.

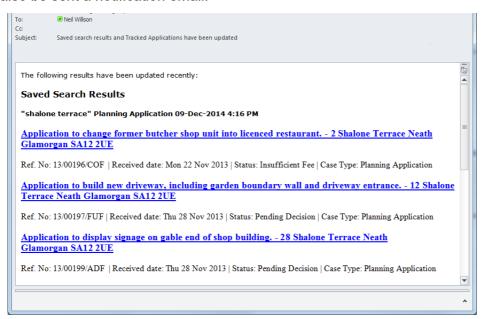


- 2 You can sort the list by clicking on the appropriate column headings:
  - Reference sort the list alphanumerically by reference
  - Address sort the list alphanumerically by the address that is the subject of the application
  - Type sort the list alphabetically by the application type
  - Status sort the list alphabetically by the status of the application.
- 3 To view a tracked application, click on the View button for that application.
- 4 To remove an application from the tracked applications list, click on the **Stop Tracking** button for that application.

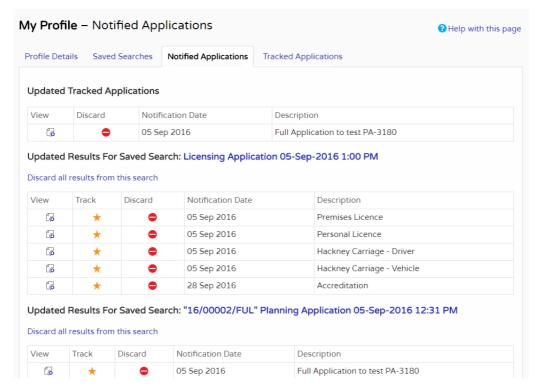


#### **Notified applications**

When applications that are the subject of a saved search or are in your Tracked Applications list are modified, a list of those applications will appear in the Notified Applications page. You will also be sent a notification email.



1 To view your notifications, select **Notified Applications** from the My Profile drop down list.



- 2 The tracked applications that have been modified are listed at the top of the screen. These are followed by the modified applications that are subject to your saved searches.
- 3 To view an application, click on the **View** button for that application.



- 4 To remove an application from the notifications list, click on the **Discard** button for that application. To delete all of the notified results for a particular search, click on **Discard All Results From This Search**.
- 5 Additionally, you can select saved search applications from the notifications list and track these. Click on the **Track** icon for the applications of interest. These will now be added to your Tracked Applications page.

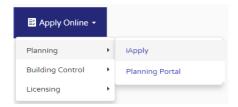


# **Apply Online**

As a member of the public, you may wish to submit your own applications to your council. As a Public Access user, you can access the application form web pages directly from the navigation bar.

To create an application from the Public Access site:

1 Click Apply Online on the right-hand side of the navigation bar.



- 2 Select the module area you wish to apply for from the menu.
- 3 Select the website you prefer to submit your application to from the sub-menu.
- 4 Log in with your existing user credentials or create a new log in.
- 5 Follow the instructions for the site to submit an application.



# **Searching**

Your primary activity when you are logged in to the Idox Public Access site will be to search for records according to a variety of criteria. There are a variety of search methods to allow you to find the information you are looking for:

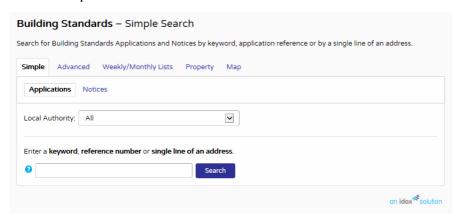
- Simple search quickly for applications or licences according to some entered text
- Advanced search according to a wide combination of relevant factors
- Weekly/monthly list search for applications whose status is validated or decided within a particular time period
- Property search for a particular property to which applications may apply
- Map search using an interactive map tool.



## Simple Search

A simple search allows you to search quickly for an application or licence by entering some text that will help identify it.

1 From the Search drop down list select the Idox PA module you want to search within, then select Simple Search.



- 2 In the Building Standards module you can search for:
  - Applications
  - Notices.

Click to select the type of record that you want to locate.

- 3 If your Local Authority belongs to a Shared Service group, you have the option to filter search results by Local Authority.
- 4 Enter some text in the **Search** box that will correspond to one of:
  - reference number (for example, "2008/0125/DET")
  - post code (for example, "G1 3PL")
  - part of an address (for example, "Drymen", "Scott Street").

If Wildcard Searching is enabled in your system your search will produce a wider range of results. Wildcard Searching assumes a wildcard symbol at the beginning and end of the search string and in between each term. For example, entering "10 High Street" (equivalent to "%10%High%Street%") may find results of "10-12 High Street" or "The Swan, 10 High Street".

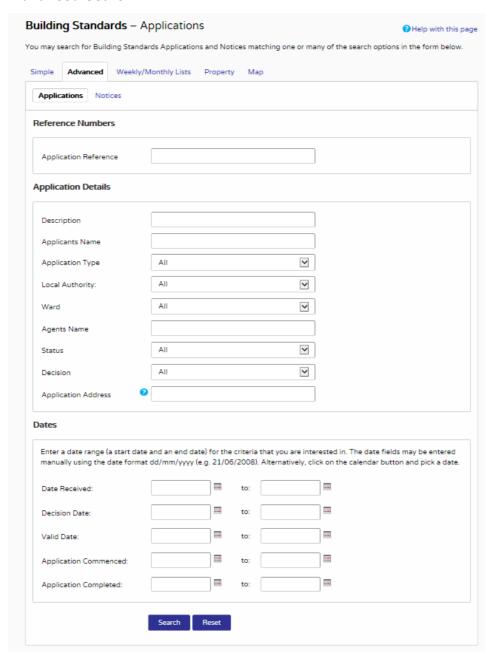
5 Click on the **Search** button to display the results of your search (see "Search Results" on page 34).



### **Advanced Search**

An advanced search allows you to build a complex combination of specific criteria on which to search for information.

1 From the Search drop down list choose the Building Standards module, then select **Advanced Search**.



- 2 In the Building Standards module you can search for:
  - Applications
  - Notices

Click to select the type of record that you want to locate.



- 3 A variety of reference numbers are associated with Building Standards records. Enter one or more to help identify a specific record.
- 4 The details you fill in will depend on the module and information type tab you selected.

Information Type	Details Required
Application details	Allows you to specify applicant's name and application type, status or decision as well as location details, including ward and address information.
Notice Application details	Allows you to specify a notice's application type, status as well as address information.

Enter the details you want to search on.

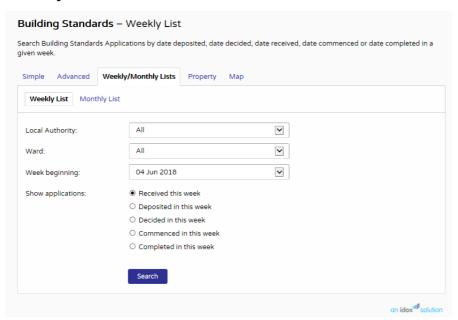
- 5 Every building standards case has a number of important dates associated with it (for example, the date the application was validated or the date that a court decision was issued). Use the date pickers to define an appropriate period to search within for any dates of interest.
- 6 Click on the Search button to display the results of your search (see "Search Results" on page 34).



## Weekly/Monthly Lists Search

The weekly or monthly lists feature allows you to search for applications according to the week or month in which they were validated or decided, as published in the local authority's lists.

1 From the Search drop down list choose the Building Standards module, then select **Weekly/Monthly Lists**.



- 2 Click on Weekly List or Monthly List to select which list you want to search.
- 3 If your Local Authority belongs to a Shared Service group, you have the option to filter search results by Local Authority.
- 4 You can narrow your search to a particular area by selecting from the **Parish** or **Ward** drop down lists.
- 5 Specify the **Week** or **Month** by selecting from the drop down list.
- 6 Under **Show applications**, select to display:
  - · Received this week
  - Deposited in this week
  - Decided in this week
  - Commenced in this week
  - Completed in this week
- 7 Click on the Search button to display the results of your search (see "Search Results" on page 34).



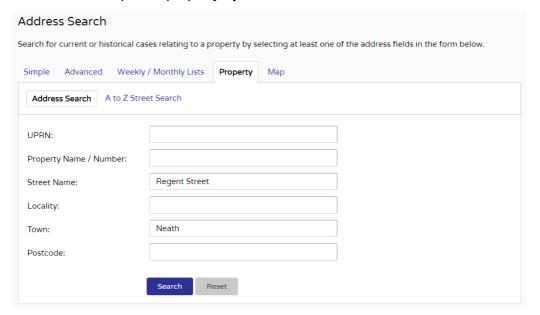
## **Property Search**

The property search feature allows you to search for a specific property in the gazetteer. There are two property search options:

- Address search for applications at a specified address
- A to Z Street search for applications on a specified street chosen from an alphabetical list.

#### **Address search**

- 1 From the Search drop down list choose the Building Standards module, then select **Property Search**.
- 2 To search for a specific property by its address, select the **Address Search** tab.

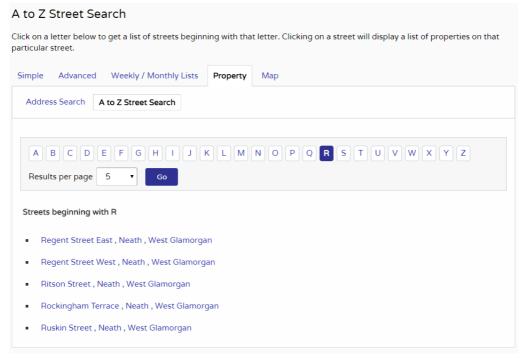


- 3 Enter as many details as you know in the appropriate fields, then press the Search button to display the results of your search (see "Search Results" on page 34).
- 4 If you need to clear the fields and start again, press the **Reset** button.



#### A to Z Street search

- 1 From the Search drop down list choose the Building Standards module, then select **Property Search**.
- 2 To search for a street alphabetically, select **A to Z Street Search**.
- 3 Click on the initial letter of the street you are interested in to display all the streets that begin with that letter.



- 4 Select a street from the list to display the addresses on that street, then choose an address to discover whether any planning records exist for that address.
- 5 To go back and chose a different street, click on the **Refine Search** button.



### **Map Search**

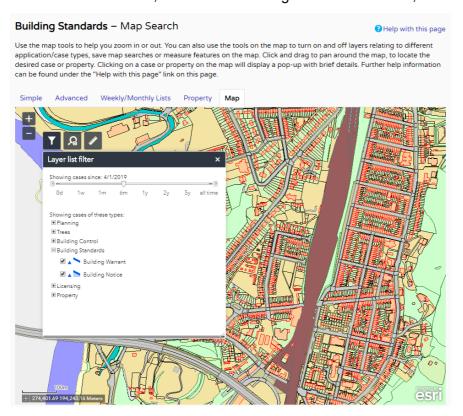
Map search allows you to identify properties that are the subjects of building warrants or notices using an interactive map. The map allows you to zoom in and examine each property to locate the records of interest to you. You can filter the display by adding or removing record types and by changing the time period.

Note This mapping functionality is not available for Acolaid, however, an external web link may be enabled.

Alternatively, if you are interested in applications relevant to a specific geographical area, such as close to your home, you can search for records limited either to the currently displayed map extent or to a specified radius from the map's centre. These searches can be saved to your Saved Searches.

Note Idox Public Access does not support watermarking on maps and continues to be compliant with Ordinance Survey standards.

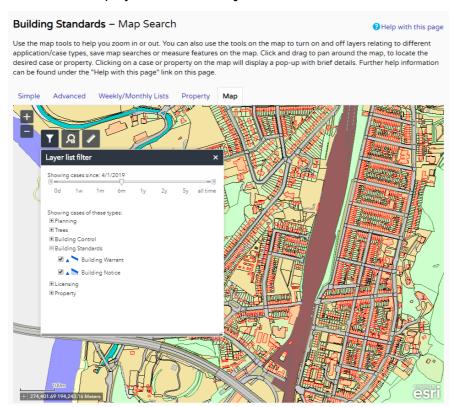
1 From the Search menu, choose the Building Standards module, then select **Map Search**.



- 2 To zoom in on a specific location, click on a point on the map and click on the + button. To zoom out, click on the button.
  - Alternatively, you can zoom in and out by scrolling the mouse wheel.
  - Note The scale at the bottom left of the map changes as you zoom.
- 3 To pan the image around, click on the map and, keeping the mouse button depressed, drag in the direction you want to pan.



4 To refine the display, click on the Layer List Filter.



5 To change the time period drag the slider to the desired time frame.



- 6 To display more record types on the map, check the relevant boxes in the **Legend and Filter** list. To remove record types from the map, uncheck them.
  - Most records can be displayed in two ways:
  - Records which only affect the property which is the subject of the application are shown as triangular points.
  - Records which affect others (for example, neighbours or the public) are displayed as a polygon which illustrates the boundary of the property affected by the application.



Module	Record type	Displayed As
Planning	Applications - properties for which planning applications have been submitted.	
	Appeals - properties which are the subject of planning appeals.	
	<b>Enforcements</b> - properties which are the subject of planning enforcements.	
Trees	Tree Preservation Order - properties for which tree preservation orders have been submitted.	
Building Control	Applications - properties for which building control applications have been submitted.	
	Contraventions - properties which are the subject of building control contraventions.	
Building Standards	Warrants - properties for which applications for building warrants have been submitted.	
	Notices - properties which are the subject of building notices.	
Licensing	Applications - properties for which licence applications have been submitted.	
	<b>Licences</b> - properties which hold one or more licences.	



Module	Record type	Displayed As
All	<b>Properties</b> - all valid properties in your local area. You can click on any of these to see if any current record (for example, application, or licence) exists at that address.	



7 Once you have identified a record of interest, click on the triangle point or polygon to display a summary of the information about the record.



If there is more than one record associated with the property, you can click on the navigation arrows to page through the record summaries.

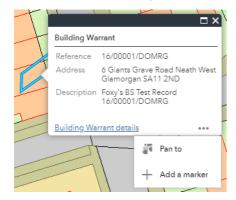
To view the full record details click on the **Details** link.

8 When the black Properties markers are displayed, you can click on any of these to view the property summary.



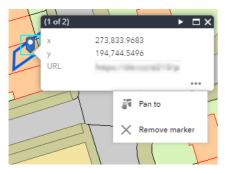
To view full details about that property, including any historical records that do not fall into the time period displayed on the map, click on **Property Details**.

9 Click the ellipsis button on the bottom right of a the property information pop up to add a marker to the property and to pan the property to the centre of the map.





10 Click on markers to view their x and y coordinates on the map. Remove them by clicking on the ellipsis button in the marker information pop up.



### Map measurement

You can take rough measurements of distances and areas on the map as well as mark down the latitude and longitude of a point on the map.

Note The measurement tool is for indicative purposes only. It is to be used only to give an idea to users of the distance between objects or area of an object. It does not define legal boundaries nor can it be used for dispute purposes.

- 1 Zoom and pan the map to display the geographical area of interest.
- 2 Click on the Measurement icon.



3 To measure an area, click on the Area icon.



- 4 Select you units from the drop down menu.
- 5 Click on the map where you wish to start your measurement.
- 6 Continue to click on each corner of the area of measurement.



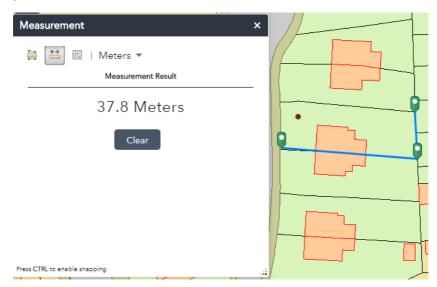
7 Double click on a point to complete the area.



- 8 You can refresh this measurement by pressing Clear, to start a new measurement.
- 9 To measure a distance on the map, click the Distance icon.



- 10 Select the unit of measurement from the drop down menu.
- 11 Click on the map where you wish to start your measurement.
- 12 Continue to click on each corner of the distance of measurement.

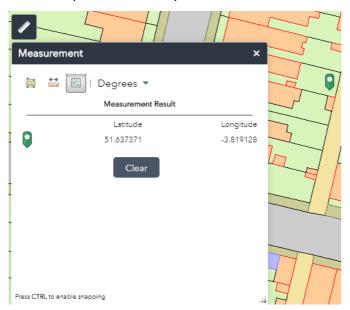


- 13 Double click to complete the measurement.
- 14 To see the position of a point on the map in latitude and longitude, click on the Location icon.
- 15 Select the coordinate unit from the drop down menu.

  Note DMS stands for Degrees Minutes Seconds.



16 Click on a point on the map to find its location.





### Saving map searches

You can add a map search to your Saved Searches list in one of two formats:

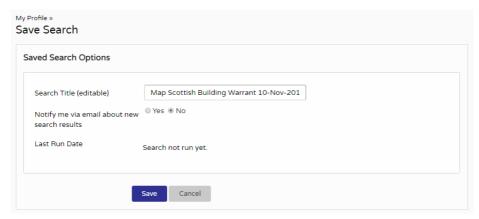
- **Rectangular search** saves all of the records of the selected record type that apply to the area currently shown on the map
- **Circular search** saves all of the records of the selected record type that apply to the area within a specified radius of the map centre.

Note Map searches can only be saved for one record type (for example, applications) at a time. If you want to save a search for another record type in the same geographical area, you must save it as a different search.

#### Rectangular search

The rectangular search allows you to display occurrences of a record type over the geographical area currently displayed on the map. By re-running the search, you can monitor new occurrences. For example, if you have zoomed the map to display your town centre and filtered the legend to display building standards applications in the last month you can save an extents search that allows you to monitor new applications arising in the town centre on a monthly basis.

- 1 Zoom and pan the map to display the geographical area of interest.
- 2 Select the required time period.
- 3 Filter the legend to display one record type.
- 4 Click on Save a rectangular search.
- 5 On the **Saved Search Options** page you may change the default search title if you wish.



- 6 If you want to be notified by email of any new records matching your search criteria, select Yes. These notifications are displayed in your Notified Applications tab (see "Notified applications" on page 12).
- 7 Click Save to save the search to your list of Saved Searches (see "Saved searches" on page 10).

#### Circular search

The circular map search allows you to display occurrences of a record type over the geographical area currently displayed within a specified proximity of the centre of the map. By re-running the search, you can monitor new occurrences. For example, if you have zoomed the map to display your home and filtered the legend to display planning applications submitted in the last year



you can save a proximity search that allows you to monitor new building standards applications arising within a specified distance of your home on a yearly basis.

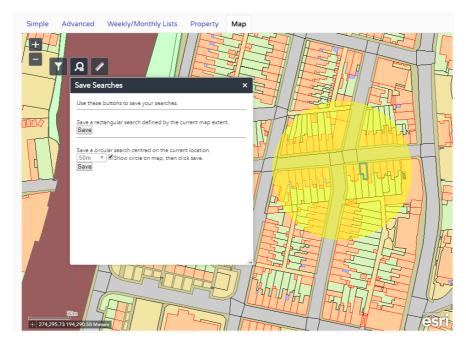
- 1 Zoom and pan the map, placing the geographical point of interest at the centre.
- 2 Click on the Layer list filter icon.



- 3 Select the required time period.
- 4 Filter the legend to display one record type.
- 5 Click on the Save Searches icon.



6 Select the radial distance from the centre in which to search for records.

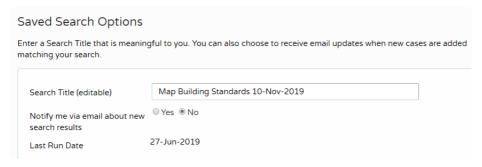


Check the **Show circle on map box** to display the proximity as a circle around the centre. You can pan the map to make adjustments if required.

- 7 Click on **Save** under drop down menu.
- 8 In the Saved Search Options box you may change the default search title if you wish.
- 9 If you want to be notified by email of any new records matching your search criteria, select Yes. These notifications are displayed in your Notified Applications tab (see "Notified applications" on page 8).



10 Click Save to save the search to your list of Saved Searches (see "Saved searches" on page 7).





# **Accessing Cases Directly**

Idox Public Access allows users to access specific cases directly by manually entering or copying and pasting its URL into the browser's address bar. The URL is composed of three parts:

- the website
- the case type
- the case number

For example, www.rbkc.gov.uk/PLAN/14/00111/CON, where **/PLAN/** indicates the Planning case type and **14/00111/CON** is the case number.

The case type codes are available for a range of modules.

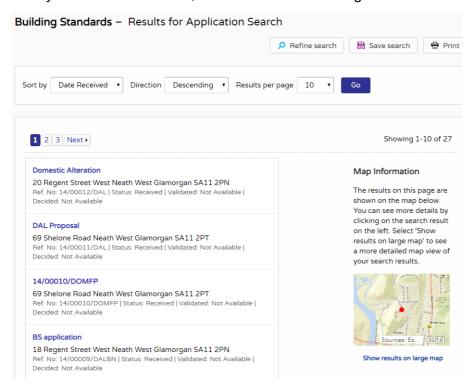
Case Type Code	Description
APPEAL	Planning Appeal
ВС	Building Control Applications
BCC	Building Control Contraventions
BS	Building Standards Applications
BSN	Building Standards Notices
ENF	Planning Enforcements
LIC	Licences Granted
LICAPP	Licensing Applications
PLAN	Planning Applications
TPO	Tree Preservation Order

You can integrate this URL into an email or a report to be used as a link.



# **Search Results**

Once you have run a search, a list of records matching the search criteria is displayed.



- 1 You can manipulate how the search results are displayed to help you find applications of particular interest:
  - Sort By re-order the results according to a selected criterion
  - Direction choose whether the results are displayed in ascending or descending order
  - **Results per page** choose how many results should be displayed on the page at once. When you have made your display selections, click on the Go button.
- 2 The number of results displayed (out of the total number of results) is shown. If there are more results than fit on to one page you can navigate between the results pages either by clicking on Next to view the next page or Previous to view the previous one, or by clicking directly on the page number
- 3 If configured, a map of the relevant area is displayed. Click on **Show results on Large map** to see the locations of the search results in greater detail (see "Map Search" on page 22).
- 4 If there are too many results, or if the results do not contain the applications you are looking for, you can go back and amend your search criteria. Press the **Refine Search** button.
- 5 To display the current page of search results in a printable format, click on the **Print** button. Click on Print again in the new window to send the page to your local printer. Press Close when you are finished with this window.
- 6 To view an individual record in detail, click on its title.



### **Saving A Search**

You may find that you use a particular search regularly. For example, a simple search based on your post code or an advanced search charting the progress of a specific building standards application. As a registered user, you can save these searches to be run again from your Saved Searches page (see "Saved searches" on page 10). Additionally, when new records corresponding to a saved search arrive, news of these will automatically appear on your Notified Applications page (see "Notified applications" on page 12).

- 1 To save a search, click on the **Save Search** button.
- 2 Change the default search title if you wish.
- 3 If you want to be notified by email of any new records matching your search criteria, select **Yes**.
- 4 Click on **Save** to save the search.

### **Record Details**

When you select to view a record, the application details are displayed at the top of the page, with further tabs below containing all of the relevant information about the application. Planning records contain the following tabs:

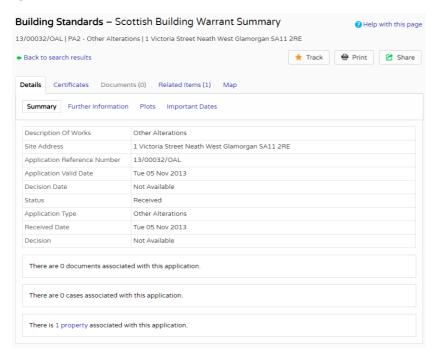
- Details displays the key information about the record
- Certificates displays a list of certificates related to the case
- Related Items displays a list of items which are related to the current record
- Map displays the case property using the map view.



#### **Details**

The Details tab displays key information about the record.

1 Click on the Details tab.



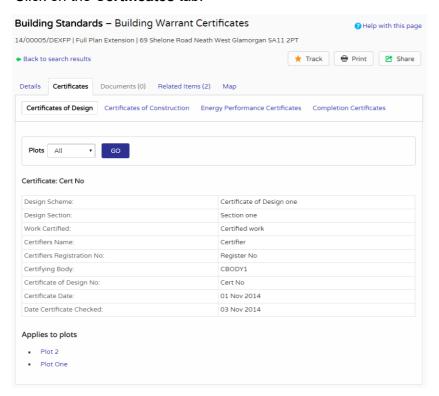
- 2 The record details are split up into four tabbed sections. Click on the appropriate tab to display those details.
  - **Summary** displays the basic information pertaining to the application. The summary also identifies the number of the documents, cases, comments and properties that have been added to this application. Click on one of these to view them.
  - Plots displays information about any plots associated with the application.
  - **Important Dates** displays the dates on which important events in the life span of the application occur from initial submission through to the decision.
  - **Further Information** displays additional information about the application that was not included in the summary. Also includes the Interested Person list a list of names and address of people (for example, property owners, applicant's agents, architects or developers) who have formally expressed an interest in this application.



#### **Certificates**

The Certificates tab displays any certificates that are associated with this case.

1 Click on the Certificates tab.



- 2 The Certificates Details are split up into four tabbed sections. Click on the appropriate tab to display those details:
  - Certificates of Design
  - Certificates of Construction
  - Energy Performance Certificates
  - Completion Certificates.
- 3 For each certificate type, you can view certificates that apply to all plots covered by the application or specify plots. Choose from the **Plot** drop down list and then click on Go.
- 4 Plots that the certificate applies to are listed at the bottom. Click on a plot to view its details.

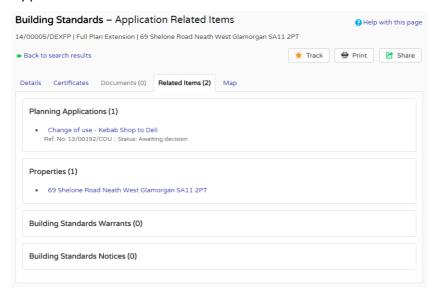
#### **Related Items**

The Related Items tab displays other cases that have a relation to the current one. These may be other Building Standards Warrants or Building Standards Notices or cases in other Idox Public Access modules, if they are available.

Affected properties are also listed in the Related Items tab.



1 Click on the Related Items tab to view a summary of additional information related to the application.



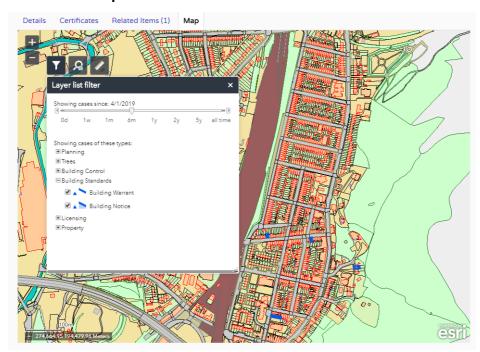
2 To view any of the listed items, click on its title.



### Map

The Map tab displays the location of the case property on the interactive map.

1 Click on the **Map** tab.



2 The interactive map contains a number of tools to help you view the application area (see "Map Search" on page 22 for details).

#### **External mapping**

If your administrator has enabled remote maps, the Map tab will display a View Map button which will open the location of the case property on an external map.

1 Click on the **Map** tab.



- 2 Press the View Map button.
- 3 The external map contains a number of tools to help you view the application area.



# **Tracking Applications**

Any application can be tracked so that you can keep up to date with its progress without having to search for it again. These cases are listed in your **Tracked Applications** page (see "Tracked applications" on page 11).

- 1 If you want to add a case to your Tracked Applications page click on the **Track** button.
- 2 To find this case again, select Tracked Applications under My Profile.
- 3 To stop tracking an application, return to the application details and click the **Stop Tracking** button at the top of the page. Alternatively, click the Stop Tracking button next to the application in the Tracked Applications page.



### **Sharing On Social Media**

Public Access has included social media integration to allow users to share comments and activity via email or Twitter.

Note The ability to use this feature is configured by your administrator.

#### Share via email

To share comments or activity through email:

- 1 Search for and open the Details tab of the desired record.
- 2 Press the Share button.

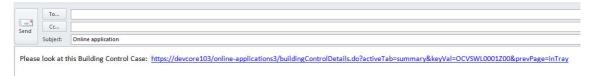


3 Press the Email icon that has now appeared alongside the Share button.



4 Your default email service will open and insert the link to the record into the email's body and use **Online application** as the subject.

Enter the recipients and any further details to the email.



Note If you wish to use another email service, copy and paste the link into your desired email.

5 Press Send.

#### **Share via Twitter**

To share comments or activity through Twitter ensure you have already created a Twitter account.

- 1 Search for and open the Details tab of the desired record.
- 2 Press the Share button.



3 Press the Twitter icon that has now appeared alongside the Share button.



4 A pop-up will appear with the link to the record inserted into the body of the Tweet. Enter any further details into the body.

Note Only 140 characters can be used for Twitter.



5 If you are not logged in, press Log in and Tweet, otherwise, press Tweet.

