

# **IDOX Public Access For Planning**

**Usage Notes** 

The IDOX Public Access For Planning 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 planning permission, appeals against refused consent and enforcements.

These Notes describe how to use the site.

IDOX Public Access For Planning Usage Notes / Version 1.0 / February 2009



# **Contents**

Usage Notes	1
User Details	3
Register	3
Log in	5
Forgotten Password	5
Logout	5
My Profile	6
Searching	10
Simple Search	10
Advanced Search	13
Map Search	16
Property Search	18
Weekly/Monthly Lists Search	22
Application Details	24
Details	25
Comments	26
Constraints	28
Documents	28
Related Items	29
Map	30
Tracking Applications	31

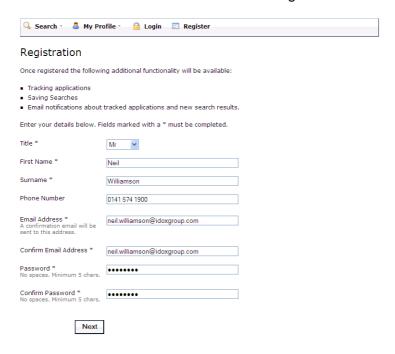


#### **User Details**

#### Register

Anyone can use the IDOX Public Access For Planning site to view planning applications, but to take advantage of the advanced profile features that allow you to save searches and track applications 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.
     Repeat it in the box below. Note Passwords must be five characters or longer and may not contain spaces. Enter the password again below to confirm that it is correct.
- 3. Click on Next.
- 4. Enter your **Postcode**, the press Next.

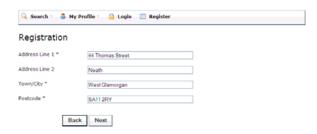




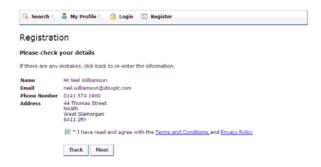
5. Select your address from the drop down list, then click on **Next**.



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

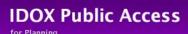


8. Click to read the **Terms and Conditions** and **Privacy Policy** that apply to the use of this site. When you have done so, tick the check box to indicate that you agree to them.



- 9. Check that your personal and login details are correct. To register them click on the **Next** button.
- 10. An email will be sent to the address you entered. This provides final confirmation that you want to create an IDOX Public Access For Planning account. When the email arrives, click on the link to be returned to the IDOX Public Access For Planning site.

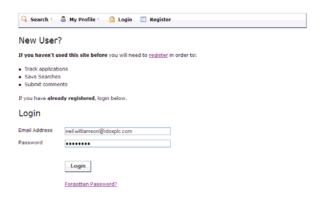




## Log in

In order to use the full range of features offered by IDOX Public Access For Planning 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.



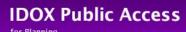
2. Enter your user name and password, then click on the **Login** button.

# **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 **Save** 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.

# Logout

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



#### My Profile

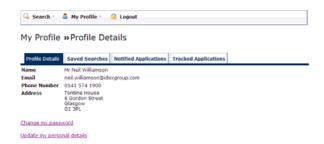
Once your account has been created you can access your My Profile area. This area allows you to configure your personal details as well as manage your searches and applications.

- Profile Details your full personal details
- Saved Searches a list of searches which you have saved
- **Notified Applications** notifications that 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.

#### **Profile Details**

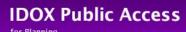
The Profile Details page can be accessed at any time to allow you to update any of your account details.

1. To access your profile page select **Profile Details** from the My Profile drop down list in the menu bar.



This 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 my password**.
- 3. Enter your email address and then enter a new password twice. Press the **Save** 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.
- 4. To change your details click on **Update my personal details**. Alter your details as appropriate, clicking on the **Next** button to page through the sections.



#### **Saved Searches**

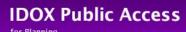
The primary activity on the IDOX Public Access For Planning site is to perform searches for planning information. Searches that will be performed frequently can be saved so that they may be repeated easily as often as you like (see Searching).

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.



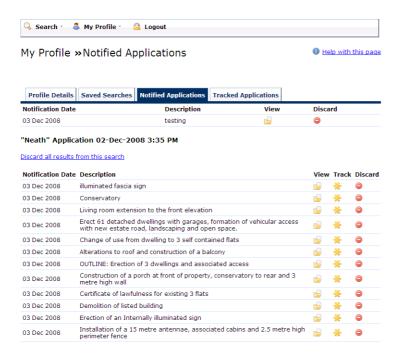
- 2. You can sort the list by clicking on the appropriate column headings:
  - Search Title sort the list alphabetically by search title
  - Search Type sort the list alphabetically by search type
  - Max Results sort the list numerically by the maximum number of results.
- 3. To perform a saved search now, click on the **Run** button for that search.
- 4. To modify the search criteria, click on the **Edit** button for that search.
- 5. To remove a search from the list, click on the **Delete** button for that search.



#### **Notified Applications**

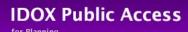
When applications that are the subject of a saved search or are in your Tracked Applications list are modified, a list of those applications will appear in the Notified Applications page. You will also be sent a notification email.

 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.

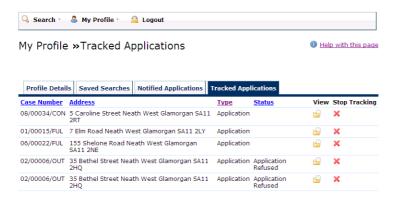
  These are followed by the modified applications that are subject to your saved searches.
- 3. To view an application, click on the **View** button for that application.
- 4. To remove an application from the notifications list, click on the **Discard** button for that application. To delete all of the 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** button for the applications of interest. These will now be added to your Tracked Applications page.



#### **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 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:
  - Case Number sort the list alphanumerically by case number
  - 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.



# Searching

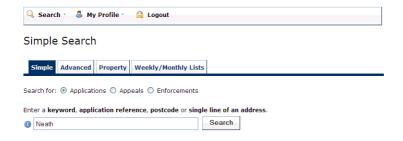
Your primary activity when you are logged in to the IDOX Public Access For Planning site will be to search for applications according to a variety of criteria. IDOX Public Access For Planning provides a variety of methods to allow you to find the information you are looking for:

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

# Simple Search

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

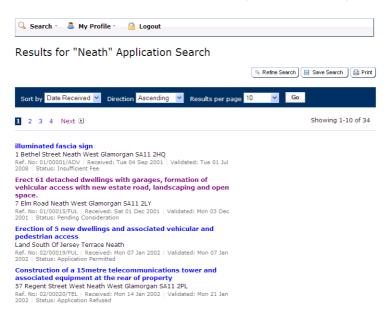
1. Select **Simple Search** from the Search drop down list.



- 2. Click to select whether you want to search for:
  - Applications
  - Appeals
  - Enforcements.
- 3. Enter some text in the Search box that will correspond to one of:
  - application reference number (for example, "2008/0125/DET")
  - post code (for example, "G1 3PL")
  - part of an address (for example, "Drymen", "Scott Street").



4. Click on the **Search** button to display the results of your search.



- 5. You can manipulate how the search results are displayed to help you find applications of particular interest:
  - Sort By select a criterion to re-order the results by
  - Direction choose whether the results should be 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.

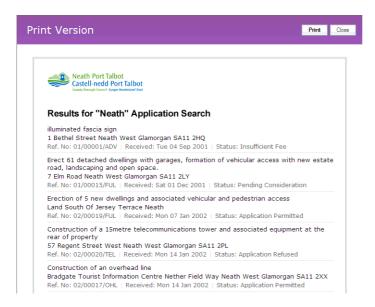
- 6. The number of results being displayed (out of the total number of results) is shown. If there are more results than fit on to one page you can navigate between the results pages either by clicking on **Next** to view the next page or by clicking directly on the page number
- 7. A map of the relevant area is displayed. Click on **Show results on large map** to see the locations of the search results in more detail (see Map Search).
- 8. To view a search in detail, click on its title.
- 9. 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. To do this, click on the **Refine Search** button.



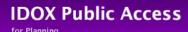
10. If this search is one that you will reuse, click on the **Save Search** button. You can edit the search name here and select whether to receive an email if new applications arrive that match the search criteria. Click on **Save** to save the search.

This search will appear in your Saved Searches page (see Saved Searches). From there it can be run as often as you like, or edited and updated at any time.

11. To display the current page of search results in a printable format, click on the **Print** button.



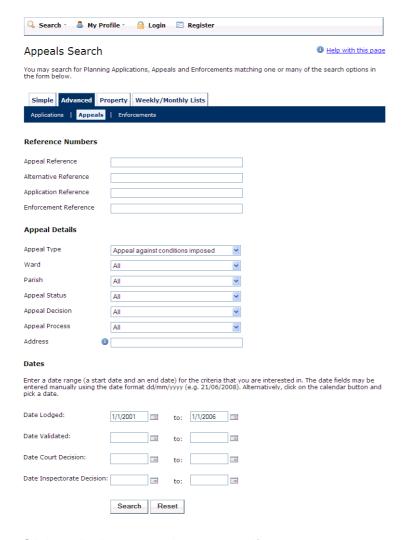
Click on **Print** again in the new window to send the page to your local printer. Press **Close** when you are finished with this window.



#### **Advanced Search**

An advanced search allows you to build a complex combination of specific criteria on which to search for an application, appeal or enforcement. These may include:

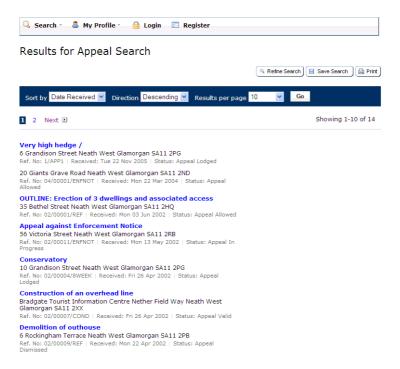
- Relevant reference numbers
- Application/Appeal/Enforcement details
- · Relevant dates.
- 1. Select **Advanced Search** from the Search drop down list.



- 2. Click to display a search page specific to:
  - Applications
  - Appeals
  - Enforcements.



- 3. If you know a reference number that identifies a specific application, appeal or enforcement enter it in the appropriate box.
- 4. The Application/Appeals/Enforcement details allow you to specify an application type, status or decision as well as location details, which include ward, parish and address information. Enter any combination of these details as appropriate.
- 5. Enter a Date range to define the period during which the application, appeal or enforcement was lodged, validated or decided by court or inspectorate.
- 6. Click on the **Search** button to display the results of your search.



- 7. You can manipulate how the search results are displayed to help you find applications of particular interest:
  - Sort By select a criterion to re-order the results by
  - Direction choose whether the results should be displayed in ascending or descending order
  - Results per page choose how many results should be displayed on the page at once.

Once you have made your display selections, click on the **Go** button.

8. The number of results being 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 by clicking directly on the page number.



- 9. A map of the relevant area is displayed. Click on **Show results on large map** to see the locations of the search results in more detail (see Map Search).
- 10. To view a search in detail, click on its title.
- 11. 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. To do this, click on the **Refine Search** button.
- 12. If this search is one that you will reuse, click on the **Save Search** button. This search will appear in your Saved Searches page (see Saved Searches). From there it can be run as often as you like, or edited and updated at any time.
- 13. To display the current page of search results in a printable format, click on the **Print** button. Click **Print** again in the new window to send the page to your local printer. Press **Close** when you are finished with this window.



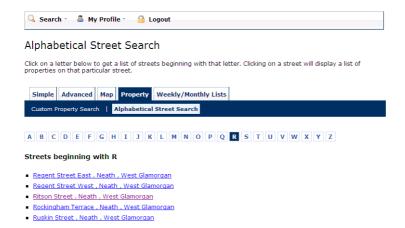
## **Property Search**

The Property Search feature allows you to search for a specific property. There are two options:

- Alphabetical Street Search search for applications on a specified street chosen from an alphabetical list
- Custom Property Search search for applications at a specified address.

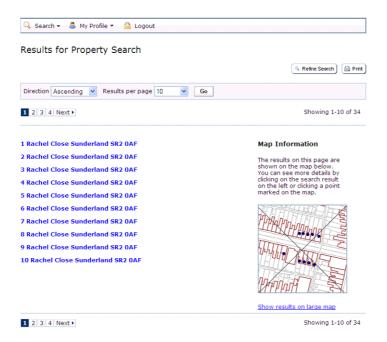
#### **Alphabetical Property Search**

- 1. Click on the **Property Search** tab.
- 2. To search for a street alphabetically, select **Alphabetical Street Search**.

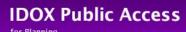




3. Click on the initial letter of the street you are interested in. Select from the list to display the addresses on that street that have an application in progress.

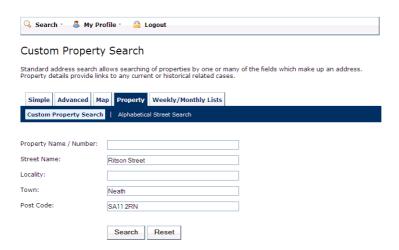


- To change the direction of the list select Ascending or Descending from the Direction drop down list, followed by Go.
- To change the number of results displayed, select from the **Results per page** drop down list, followed by **Go**.
- If there are more results than fit on one page, you can navigate to further pages by clicking on Next or by clicking on the Page Number directly.
- 4. You can print this list by clicking on the **Print** button.
- 5. The application locations are displayed on a **Map** on the right. You can display a larger map by clicking on **Show results on large map**.
- 6. To go back and chose a different street, click on the **Refine Search** button.

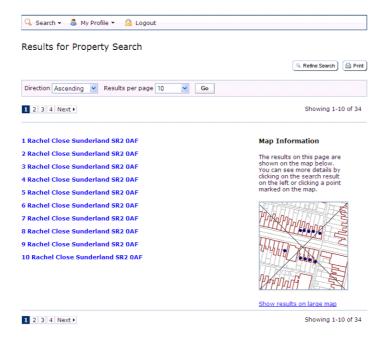


#### **Custom Property Search**

- 1. Click on the **Property Search** tab.
- 2. To search for a specific property by its address, select the **Custom Property Search** tab.



3. Enter as many details as you know in the appropriate boxes, then click on the **Search** button. Alternatively, click on the **Reset** button to clear the fields and start again.



- To change the direction of the list select Ascending or Descending from the Direction drop down list, followed by Go.
- To change the number of results displayed, select from the **Results per page** drop down list, followed by **Go**.
- If there are more results than fit on one page, you can navigate to further pages by clicking on Next or by clicking on the Page Number directly.



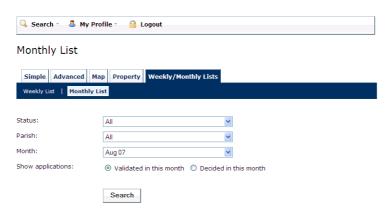
- 4. To add this search to your Saved Searches page, click on the **Save Search** button.
- 5. You can print off this list by clicking on the **Print** button.
- 6. The application locations are displayed on a **Map** on the right. You can display a larger map by clicking on **Show results on large map**.
- 7. If there are too many results you may want to add more information to the Search. Click on the **Refine Search** button.



## Weekly/Monthly Lists Search

The Weekly/Monthly Lists feature allows you to search for applications according to the week or month in which they were validated or decided.

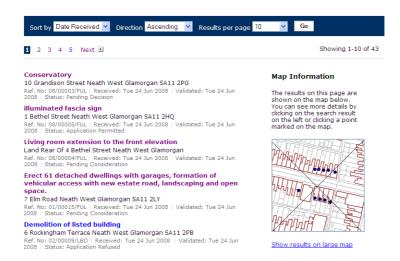
1. Click on the Weekly/Monthly Lists tab.



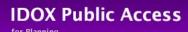
- 2. Click on **Weekly List** or **Monthly List** to select which list you want to search.
- 3. Select the application status from the **Status** drop down list.
- 4. You can narrow your search to a particular area by selecting from the **Parish** drop down list.
- 5. Specify the **Week** or **Month** by selecting from the drop down list.
- 6. You can display applications which were validated or applications which were decided during the selected time period. Make the appropriate selection under **Show applications**.



7. When you have made your selections, click on the **Search** button.

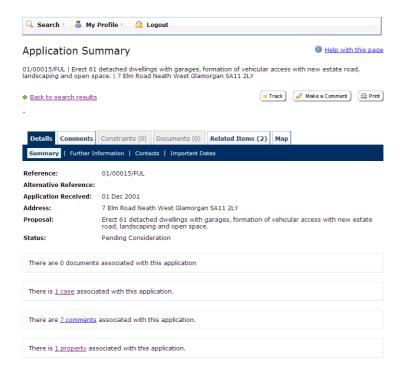


- You can re-order the list by reference number, date received, description or status.
   Select one of these from the Sort by drop down list, then click on Go.
- To change the direction of the list select Ascending or Descending from the Direction drop down list, followed by Go.
- To change the number of results displayed, select from the Results per page drop down list, followed by Go.
- If there are more results than fit on one page, navigate to further pages by clicking on Next or by clicking on the Page Number directly.
- 8. To add this search to your Saved Searches page, click on the **Save Search** button.
- 9. You can print off this list by clicking on the **Print** button.
- 10. The application locations are displayed on a **Map** on the right. You can display a larger map by clicking on **Show results on large map**.
- 11. If there are too many results you may want to add more information to the Search. Click on the **Refine Search** button.

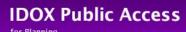


# **Application Details**

Once you have selected an application from your search results the application's details will be displayed.

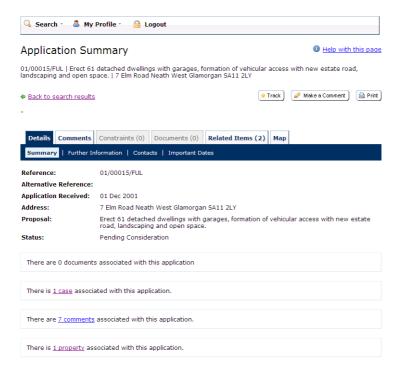


The application details are displayed at the top of the page, with further tabs below containing all of the relevant information about the application.



#### **Details**

1. Click on the **Details** tab to display the full details relating to the application.

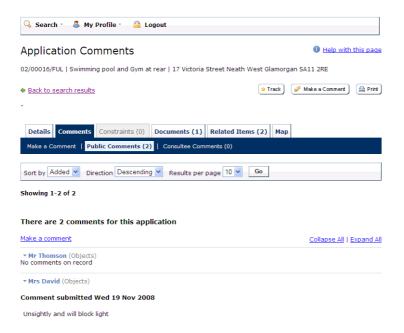


- 2. The Application Details are split up into four tabbed sections. Click on the appropriate tab to display those details:
  - Summary displays the basic information pertaining to the application. The summary also identifies the number of the documents, cases, comments and properties that have been added to this application. Click on one of these to view them.
  - **Further Information** displays additional information about the application that was not included in the summary.
  - Contacts displays a list of contacts relevant to this application.
  - **Important Dates** displays the dates on which important events in the lifespan of the application occur from initial submission through to the decision.

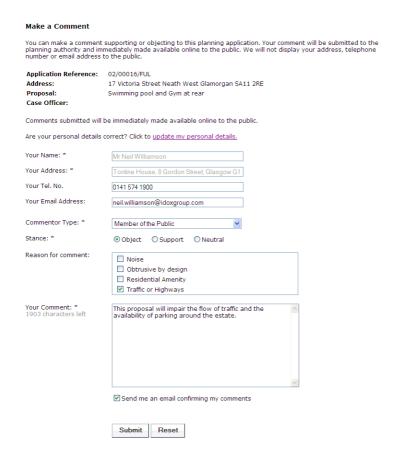


#### **Comments**

1. Click on the **Comments** tab to display comments that have been made about this application.



- Comments can either be submitted by members of the public or by people who have been consulted about the application. Click on **Public Comments** or **Consultee** Comments as appropriate.
- 3. You can re-order the list by the date the comment was added or by the commentor's name. Select one of these from the **Sort by** drop down list, then click on **Go**.
- 4. To change the direction of the list select Ascending or Descending from the **Direction** drop down list, followed by **Go**.
- 5. To change the number of results displayed, select from the **Results per page** drop down list, followed by **Go**.
- 6. If there are more results than fit on one page, navigate to further pages by clicking on **Next** or by clicking on the **Page Number** directly.
- 7. Comments are displayed showing the name of the commentor and their stance on the application (objects, supports or neutral). Click on the commentor's name to display the comment itself. Click on it again to collapse the comment again.
- 8. Click on **Expand All** to view all of the comments on the page. Click on **Collapse All** to hide them all again.
- 9. To add a comment to the list, click on **Make a Comment**.

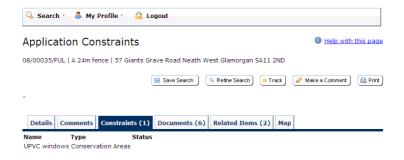


- 10. Your name and address are added automatically to the form. If these are not correct, click on **update my personal details** and make the appropriate changes.
- 11. Add your remaining contact details in the appropriate boxes.
- 12. The **Commentor Type** drop down list describes the type of people who may need to make a comment about an application. These include councillors, neighbours to the application address and members of the public. Select the one that applies to you.
- 13. In the **Reason for comment box** select one or more of the offered reasons for making your comment.
- 14. Enter the details of your comment in the **Your Comment** box.
- 15. If you want to receive an email confirming that your comment has been received, check the **Send me an email confirming my comments box**.
- 16. When you have completed all the details, click on the **Submit** button. Your comment will appear in the Comments page for this application.



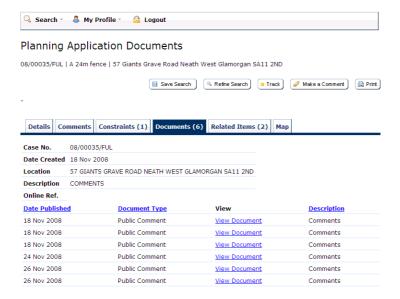
#### **Constraints**

1. Click on the **Constraints** tab to display any constraints that have been placed on this application.



#### **Documents**

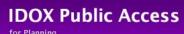
1. Click on the **Documents** tab to display any documents that have been added to this application.



- 2. You can re-order the list according to:
  - Date Published
  - Document Type
  - Description.

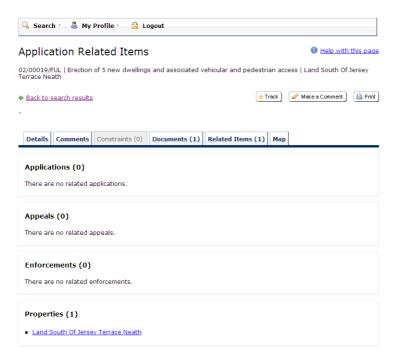
Click on the appropriate heading to sort the list.

3. To view any of the documents in a separate window, click on **View Document** beside the document you require.



## **Related Items**

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



#### These may include:

- Applications
- Appeals
- Enforcements
- Properties.
- 2. To view any of the listed items, click on its title.