

**Idox Public Access 2.1
For Scottish Building Standards
User Guide**

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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.

Users of sites incorporating Idox E2E Online Forms can also complete and submit applications for building warrants and amendments.

This document describes how to use the site.



User Details

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 eight characters or longer, must contain a mixture of letters and numbers and may 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 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 the 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 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 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
- 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 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.
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. 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.
- 4 To change your details click on Update Personal Details. Alter your details as required, clicking on the Next button to page through the sections.
- 5 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).

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.
 - 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 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.



Searching

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

- Simple search - search quickly for applications or notices according to some entered text
- Advanced search - search according to a wide combination of relevant factors
- Map search - search using an interactive map tool
- Property search - search for a particular property to which applications may apply
- Weekly/monthly list search - 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 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 The kind of information you will be able to search for will depend on the module you selected in the previous step.

Idox PA Module	Information Types
Idox PA for Scottish Building Standards	Applications, notices

Click to select the type of information of interest.

- 3 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").
- 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 - re-order the results according to a selected criterion
 - 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 To view a search result in detail, click on its title (see Search Results).



- 8 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.
- 9 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 at any time.
- 10 To display the current page of search results in a printable format, click on the Print button.
- 11 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 information.

- 1 From the Search drop down list select the Idox PA module you want to search within, then select Advanced Search.
- 2 The kind of information you will be able to search for will depend on the module you selected in the previous step.

Idox PA Module	Information Types
Idox PA for Scottish Building Standards	Application, Notices

Click to select the type of information of interest.

- 3 If you know a Application Number or Building Standard Application Number that identify a specific application or notice enter them in the appropriate box.
- 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 Enter a Date Range to define an appropriate date period to search within.
- 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 - re-order the results according to a selected criterion
 - 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 To view a search in detail, click on its title (see Search Results).
 - 10 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.
 - 11 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.
 - 12 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.

Map search

The Map Search feature allows you to identify properties that are the subjects of applications, appeals, enforcements or licenses using an interactive map.

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

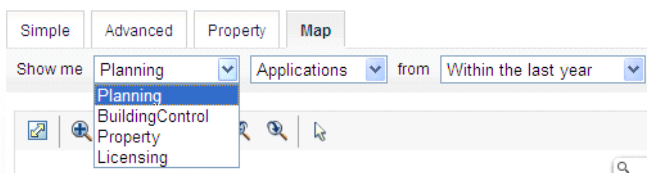
Note This mapping functionality is not available for Acolaid, however an external web link may be enabled.

Note This feature is only recommended for broadband users.

- 1 If the interactive map is not displayed, click on the Map Search tab.
- 2 The features that you will be able to display on the map will depend on the module selected.

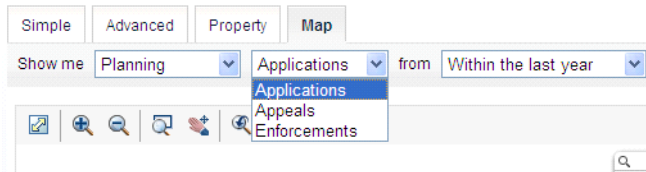
Information Type	Displayed As
Warrants	Red polygons
Notices	Yellow polygons

- 3 Click the Legend and Filter button to select the module and information type.

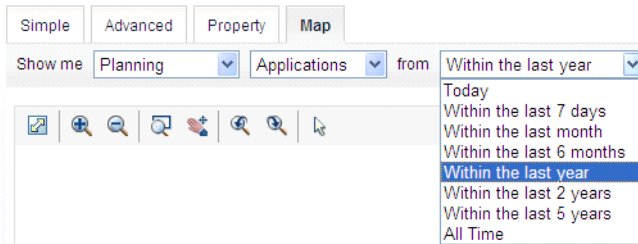




4 Check the information type from the list of information types.



5 Choose the relevant time period from the drop down list.



6 The interactive map contains a number of tools to help you zoom in and locate the desired addresses:

- Initial map view - click this to zoom the map out to show the widest possible view
 - Zoom in - select this tool then click a point on the map that you want to zoom in to
 - Zoom out - select this tool then click on the map to zoom out
 - Zoom Slider - move the slider up to zoom in, down to zoom out
 - Pan mode - to move around the map, select this then click on the map. Keeping the mouse button depressed, drag the cursor in the direction that you want to pan
 - Pan arrows - click on the up, down, left or right arrows to pan the view in the selected direction
 - Zoom to rectangle - to zoom in on a selected area, select this tool then click and drag the cursor to draw an area on the map
 - Previous view - to return to the previous view, click on this tool
 - Next view - when you have used the Previous view tool, click on this button to go to the view that followed the one that is currently displayed
 - Map area - displays the dimensions of the area displayed by the map.
- 7 Use these tools to display a map area that contains one or more applications of interest. Hover the cursor over one of the identifying dots to display the reference number for that application.
- 8 The applications shown on the map are listed by reference number to the right. To open one of these, click on its title.
- 9 Alternatively you can display the applications on the map as a search results list. To do this, click on Show Results as a List.
- You can print off this list by clicking on the Print button.
 - The application locations are displayed on a Map on the right. You can return to the original map by clicking on Show results on large map.
- 10 You can add a map search to your Saved Searches list in one of two formats:



- Save Map Extents Search - click on this to save the search, incorporating all of the applications shown on the map
- Save Proximity Search - select a proximity distance, then click on this to save the search, incorporating all of the applications within the selected distance.

Property search

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

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

A to Z Street Search

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

Address Search

- 1 From the Search drop down list select the Idox PA module you want to search within, 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 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 From the Search drop down list select the Idox PA module you want to search within, then select Weekly/Monthly Lists.
- 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.

Tracking applications

- 1 Any application or licence can be Tracked so that you can keep up to date with its progress without having to search for it again.
- 2 Once you have performed a search, view the details of one of the resulting applications.
- 3 If you want to add this to your Tracked Applications page (see Tracked Applications), click on the Track button.
- 4 To return to this application at a later date, select Tracked Applications under My Profile.
- 5 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.



Accessing Cases Directly

Idox Public Access 2.1 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
BC	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

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



Search results

Building Standards Applications

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. 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.
 - 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.

Certificates

- 1 Click on the Certificates tab to view the certificates related to the application.
- 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

- 1 Click on the Related Items tab to view a summary of additional information related to the application.
These may include:
 - Applications
 - Properties



- Stages and Amendments
 - Notices.
- 2 To view any of the listed items, click on its title.

Map

- 1 Click on the Map tab to display the area of the application on a map.
- 2 The interactive map contains a number of tools to help you view the application area:
 - Initial map view - click this to zoom the map out to show the widest possible view.
 - Zoom in - select this tool then click a point on the map that you want to zoom in to. Alternatively you can drag the Zoom Slider up.
 - Zoom out - select this tool then click on the map to zoom out. Alternatively you can drag the Zoom Slider down.
 - Pan mode - to move around the map, select this then click on the map. Keeping the mouse button depressed, drag the cursor in the direction that you want to pan. Alternatively you can click on the Pan Direction arrows on the map.
 - Zoom to rectangle - to zoom in on a selected area, select this tool then click and drag the cursor to draw an area on the map.
 - Previous view - to return to the previous view, click on this tool.
 - Next view - when you have used the Previous view tool, click on this button to go to the view that followed the one that is currently displayed.

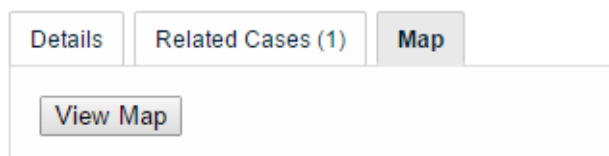
External mapping

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.

Planning » Appeal Map

Not specified | 2-A Hadlow Road, Sidcup, DA14 4AF



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

Form Applications

If you have Idox Scottish Building Standards E2E Online Forms, you can fill in and submit applications for and amendments to Building Warrants direct from Idox PA.

You can return to your forms at any time to view submitted forms and complete or amend forms that have not yet been submitted.



- 1 To start a new form, click on Form Applications.
- 2 Select which kind of application you want to submit:
 - Application for Building Warrant
 - Application for Amendment of a Building Warrant.
- 3 Application forms are presented as a series of pages into which you enter information appropriate to the application. Once you have completed the form you can attach any required supporting documentation, submit payment and submit the completed application.
- 4 To begin a form, click on the form name under the section: 1 Complete a form.
- 5 Progress through the form, filling in the information required on each page.
Use Next and Previous to navigate through the form. To start a page again, press Clear Page.
- 6 You don't have to complete a form in one session, instead you can save a partially completed form and return to it later. Click on the Save and Exit button on any page in the form. Forms which have not yet been submitted are listed under Draft Submissions on your Form Submission page. Simply select the form from this list, then click on Edit Form.
- 7 When your form is complete you will be returned to the Forms Dashboard.
- 8 To attach one or more documents click on Attach additional documents, browse to locate the document in your system and then click on OK.
- 9 Select a Payment option to indicate how you intend to pay for your application.
- 10 Press the Submit button to complete the submission.

Form Submission

You can review form applications that you have submitted at any time. You can also return to form applications that have not yet been submitted and work on them further. Submitted Applications and Draft Submissions are located on your Form Submissions page.

- 1 Select Form Submissions tab under My Profile.
- 2 To open an uncompleted application click on the appropriate unique Online Ref number in the list under Draft Submissions. On the forms dashboard, click on Edit Form.
- 3 To delete an incomplete form click on the appropriate Delete button in the Draft Submissions list. Forms deleted at the draft stage are deleted permanently and not submitted.
- 4 To review a submitted form, click on the appropriate Council Ref number in the list under Submitted Applications. On the submission summary page you can view a PDF version of the submitted form and any supporting documents. You cannot edit the form details in any way.
- 5 To delete a submitted form from your Forms Submissions page click on the appropriate Delete button in the Submitted Applications list. This only removes the application from your Forms Submission page, the application still exists within the Local Authority's system.