Idox Public Access for Consultee Access

User Guide

Idox. Do more.

Contents

Introduction

The Idox Public Access For Consultee Access website has been designed to provide an efficient and easy-to-use process for members of consultee bodies to search for and track applications in a variety of sectors. It also allows them to submit and track comments made on selected areas of interest.

Consultee Access can be used on mobile and tablet devices.

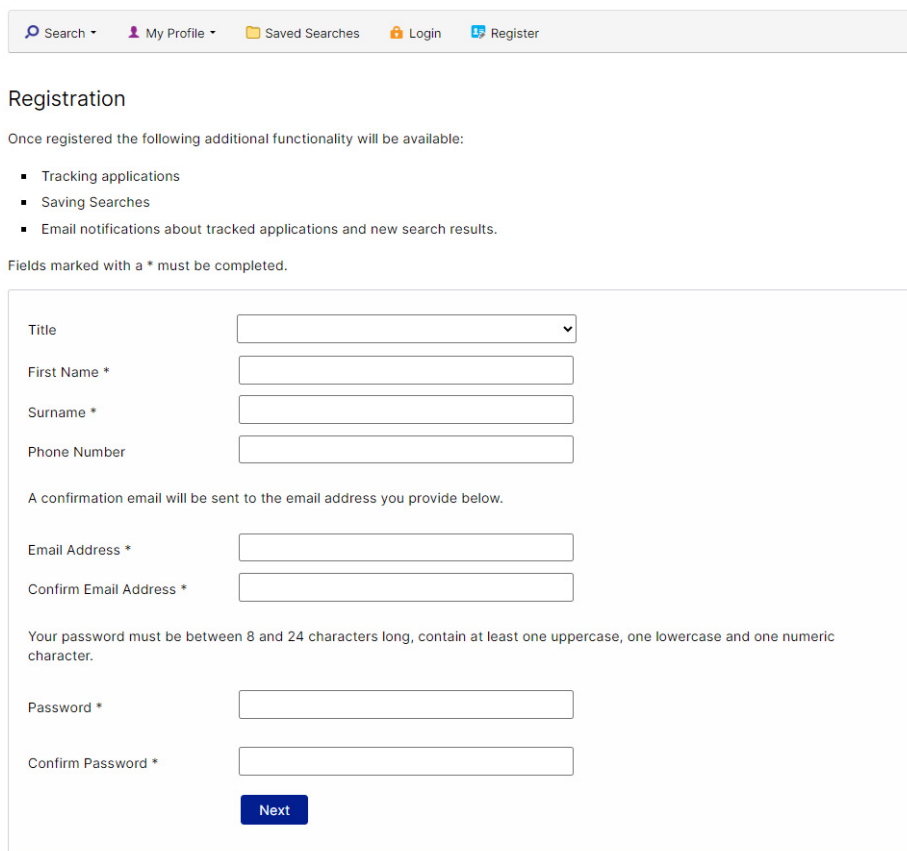This document describes how to use the site.

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

Registering for an Idox Public Access user account only requires you to provide your name and relevant contact details.

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**.

Registration

Postcode *	SA12 2RR

Back   Next

5. Select your address from the drop down list, then click on **Next**.
6. If your address is not listed, enter your address in the appropriate fields and click on **Next**.

Registration

⊗ **Please check your registration details**
- No addresses were found at this postcode. Please enter your full address below or click back to correct your postcode.

Address Line 1 *	42 Thomas Street
Address Line 2	
Town/City *	Glamorgan
Postcode *	SA12 2RY

Back   Next

7. 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.
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. An email will be sent to the address you entered. This provides confirmation that you want to create an Idox Public Access account.

Subject: Registration Confirmation Request

Hello Sophie Morris,

To confirm your registration please click the following link:

https://devcore103/online-applications3/registrationConfirm.do?
action=createUser&key=30213fe2cee65d70d0c92d67f44bb64c

If required you can also copy the link to the address field of your browser.

Please Logon with the username and password you originally selected.

11. Click on the link in the email to open the confirmation page in the Idox Public Access site.
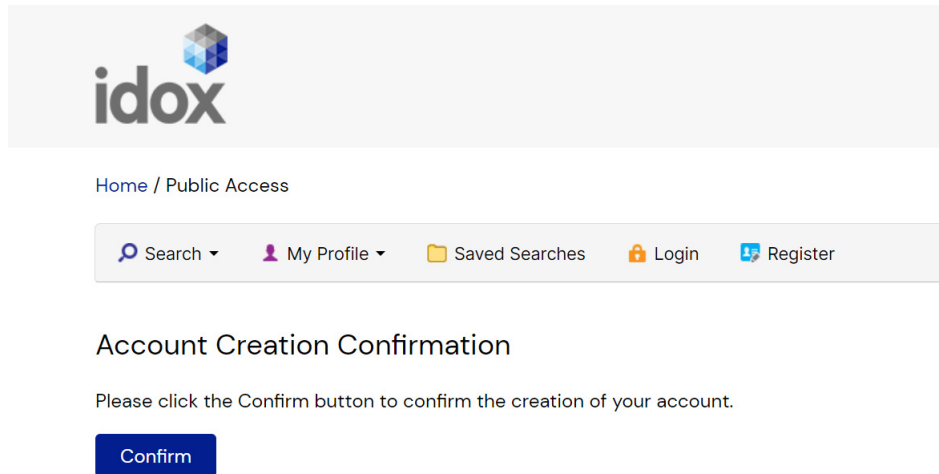
12. Click on the **Confirm** button to confirm the creation of your account. You can now use your login details to log into Idox Public Access.

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 username and password you provided when you registered your account.
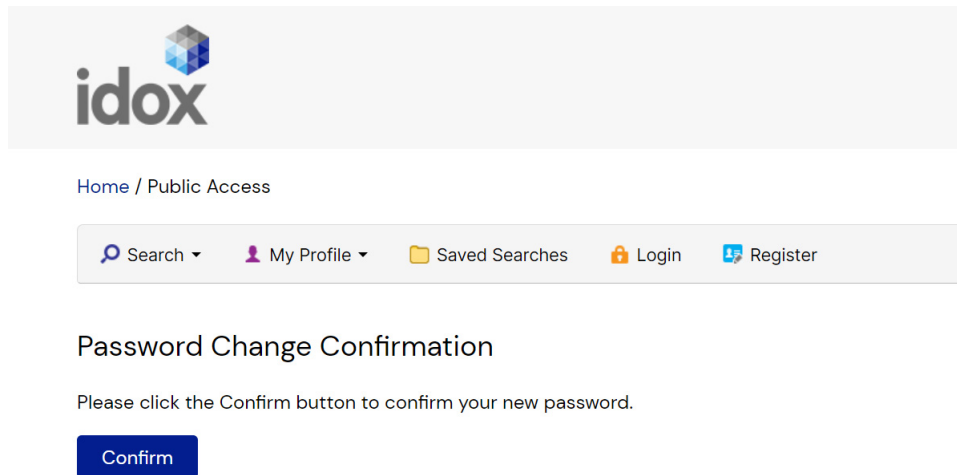
1. Click on **Login** in the menu bar.
2. Enter your email address and password, then click on the **Login** button.

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 to open the confirmation page in Idox Public Access.

4. Click on the **Confirm** button to confirm your password change. You can now 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.

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 to open the confirmation page in Idox Public Access.

5. Click on the **Confirm** button to confirm your password change. You can now log in with your new password.

6. To change your details click on **Update Personal Details**. Alter your details as required, clicking on the Next button to page through the sections.

   Note If you update the email address linked to the account, you'll receive a confirmation email, and will need to click on the link in this to open a confirmation page, similar to when you change your password.

7. When you no longer wish to use Idox Public Access, click on **Delete Profile**.

In Tray Settings

The In Tray Settings page displays the interest areas that you have membership of within your consultee group. It also displays whether you are the coordinator of each interest area.

1. Select the **In Tray Settings** tab.

2. For each interest area listed you can choose to receive an email summary of comments submitted about it. To do this, check the **Email Acknowledgement** boxes for the relevant interest areas.
3. Click on the **Save** button.

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 21).

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.

To view your saved searches:

1. Do one of the following:
   - Select **Saved Searches** from the menu bar.

– Select **Saved Searches** from the **My Profile** drop down list.

My Profile – Saved Searches   ❓ Help with this page

Profile Details	**Saved Searches**	Notified Applications	Tracked Applications	

Run	Edit	Delete	Search Title ⬍	Search Type ⬍
▶	✏	⛔	"24/*/FUL" Planning Application 08-Mar-2024 12:31 PM	Application
▶	✏	⛔	"%Caroline Street%" Building Control Application 11-Mar-2024 2:10 PM	Building Control
▶	✏	⛔	Licensing Application Animal Welfare East	Licensing Application
▶	✏	⛔	"cedar" Trees 11-Mar-2024 2:15 PM	Trees

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, 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.

My Profile – Tracked Applications   ❓ Help with this page

Profile Details	Saved Searches	Notified Applications	**Tracked Applications**	

View	Stop Tracking	Reference ⬍	Address ⬍	Type ⬍	Status ⬍
📄	❌	24/00004/FUL	7 Caroline Street Neath West Glamorgan SA11 2RT	Application	Received
📄	❌	23/00001/DAL	69 Shelone Road Neath West Glamorgan SA11 2PT	Building Control	Received
📄	❌	AC-00003	5 Caroline Street Neath West Glamorgan SA11 2RT	Licence Application	

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.
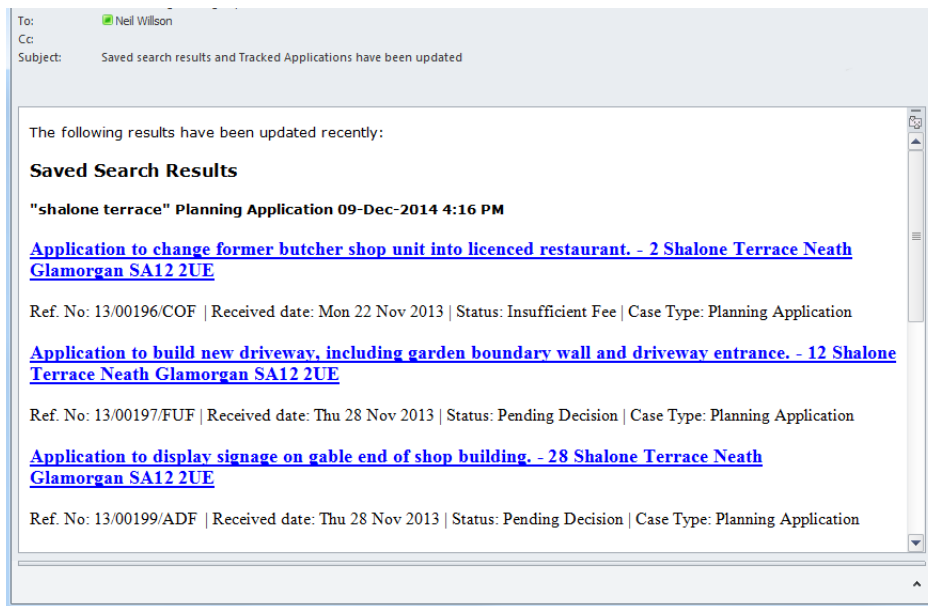
To view your notifications:

1. 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.

Consultee In Tray

As a Consultee user, you have a set of consultee pages that allow you to view new, active and past consultations for your Interest Area. You can also perform a consultation search.

In tray

The In Tray displays a list of applications on which requests for consultation in your interest area have been made. Each application may have one or more requests for consultation associated with it.

Viewing applications awaiting consultation

To view applications:

1. You can choose to display applications related to an interest area to which you belong, or to all of them. Select from the **Interest Area** drop down list.

2. You can configure the way the list is displayed.
   – To sort the results, select a criterion from the **Sort by** list.

- To change the direction of the listed results select Ascending or Descending from the **Direction** list.
- To change the number of results displayed at one time select a value from the **Results per page** list.

When you have made your display selections, press **Go**.

3. You can browse the In Tray for consultations of interest to you. If there are more results than fit on one page, use the Next and Previous buttons or go to a particular page to speed up navigation.

Each request for consultation displays information appropriate to the type of application, including:

- **Letter Reference** - the relevant letter reference number
- **Consultee** - the person or body who have been requested to respond to the consultation
- **Date Requested** - the date the request for consultation was initiated
- **Expiry Date** - the date that consultee comments must be made by
- **Days to Expiry** - the number of days until the expiry date.

4. To view the details of the application click on its title. You will also be able to read any public and consultee comments that have already been made.

Commenting on an application

To submit a consultee comment, you can either type a note directly, or you can upload an existing document. You can also send a message directly to a consultee group coordinator.

To comment on an application, click on the **Consultee comment** button below the application summary.

Planning Application
23/00001/FUL │ Full planning application │ 47 Shelone Road Neath West Glamorgan SA11 2PT

Close Window

| Submit Comment | Upload Document |

Consult as: Env Agency -- Environment Agency ⌄

Response by:

2000 characters left

Submit Comment   Clear

Note Draft comments are retained up to two days after being logged out due to a time-out. You must log in using the same browser and PC as the comment was started. Successful submissions are not retained.

To submit a comment directly:

1. Select the **Submit Comment** tab in the pop-up window.
2. Select the relevant interest area from the **Consult as** drop down list.
3. In the **Response By** field, type your name.
4. Type your comment into the text box.
5. Make sure you spell check your comment before submitting by correcting them or by right clicking on red underlined words and selecting the appropriate correction.
6. When you're finished, click on the **Submit Comment** button.

   When submitting a comment, your name, email address and organisation details will be displayed within email notifications.

To upload a pre-prepared submission as a document:

1. Select the **Upload Document** tab in the pop-up window.
2. Select the relevant interest area from the **Consult as** drop down list.
3. In the **Response By** field, type your name.
4. Click on the **Choose file** button and navigate to the document's location on your computer or network.
5. When you have located your document, click on the **Upload** button.

To send a message to consultee group coordinator:

1. Select the **Email Coordinator** tab.
2. Select the relevant interest area from the **Consult as** drop down list.
3. Type the text of the message that you want to send.
4. Click on the **Email to Group Coordinator** button.

Active consultations

The Active Consultations page displays a list of applications currently under consultation on which you have made a consultee comment. You have until the expiry date to make any further comment. After this date they will be moved into the Previous Consultations page.

1. You can choose to display applications related to an interest area to which you belong, or to all of them. Select from the **Interest Area** drop down list.

2. You can display only submissions that were made by you or submissions that were made by other members of your consultee group. Select **Only me** or **Any user in the group**, then press Go.

3. You can configure the way the list is displayed.

   – To sort the results, select a criterion from the **Sort by** list.

   – To change the direction of the listed results select Ascending or Descending from the **Direction** list.

   – To change the number of results displayed at one time select a value from the **Results per page** list.

   When you have made your display selections, press **Go**.

4. You can browse for consultations of interest. If there are more results than fit on one page, use the Next and Previous buttons or go to a particular page to speed up navigation.

Each request for consultation displays information appropriate to the type of application, including:

- **Letter Reference** - the relevant letter reference number
- **Consultee** - the person or body who have been requested to respond to the consultation
- **Date Requested** - the date the request for consultation was initiated
- **Expiry Date** - the date that consultee comments must be made by
- **Days to Expiry** - the number of days until the expiry date.

5. To view the details of the application click on its title. You will also be able to read your previous submission, and any other public and consultee comments.

    Alternatively, to go straight to the consultee comments, press **Show Consultee Comments**.

6. To add a further comment on an application click on the **Consultee comment** button, and then follow the relevant steps in "Commenting on an application" on page 15.

    Note Some interest groups do not permit you to make more than one comment.

Previous consultations

The Previous Consultations page displays a list of applications whose consultation expiry has passed on which you have made a consultee comment. These are listed here for reference purposes and will be automatically removed a certain time later as determined by your consultee group administrator.

To view a previous consultation:

1. You can choose to display applications related to an interest area to which you belong, or to all of them. Select from the **Interest Area** drop down list.

2. You can display only submissions that were made by you or submissions that were made by other members of your consultee group. Select **Only me** or **Any user in the group**, then press Go.

3. You can configure the way the list is displayed.

   − To sort the results, select a criterion from the **Sort by** list.

   − To change the direction of the listed results select Ascending or Descending from the **Direction** list.

   − To change the number of results displayed at one time select a value from the **Results per page** list.

   When you have made your display selections, press **Go**.

4. You can browse for consultations of interest. If there are more results than fit on one page, use the Next and Previous buttons or go to a particular page to speed up navigation.

   Each request for consultation displays information appropriate to the type of application, including:

   − **Letter Reference** - the relevant letter reference number

   − **Consultee** - the person or body who have been requested to respond to the consultation

   − **Date Requested** - the date the request for consultation was initiated

   − **Expiry Date** - the date that consultee comments must be made by

   − **Days to Expiry** - the number of days until the expiry date.

5. To view the details of the application click on its title. You will also be able to read your previous submission, and any other public and consultee comments.

   Alternatively, to go straight to the consultee comments, press **Show Consultee Comments**.

6. You cannot add further consultee comments to applications in the Previous Consultations page because their consultation period has expired.

Consultation search

Consultees can search for applications that have been commented on.

1. Choose which functional area to search within from the **System** drop down list.
2. If the search relates to Planning, enter appropriate information in the **Letter Reference** and **Consultee Name** boxes, if known.
3. Select the interest area from the **Consultation Type** drop down list.
4. In the **Comment Date** boxes, enter the beginning and end dates between which comments have been made.

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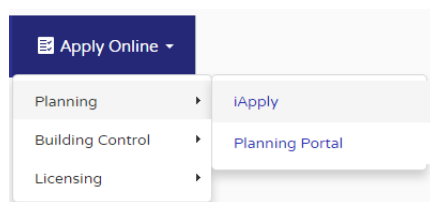
2. Select the module area you wish to apply for from the menu.
3. Select the website you prefer to submit your application to from the sub-menu.
4. Log in with your existing user credentials or create a new log in.
5. Follow the instructions for the site to submit an application.

Searching

The primary activity in 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.

Note These vary according to the Idox Public Access module being used.

- **Simple** - search quickly for applications, appeals or enforcements 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, appeal or enforcement by entering some text that will help identify it.

1. From the **Search** drop down list, select the relevant module, and then **Simple Search**.

Planning – Simple Search

Search for Planning Applications, Appeals and Enforcements by keyword, application reference, postcode or by a single line of an address.

Simple	Advanced	Weekly/Monthly Lists	Property	Map

Applications	Appeals	Enforcements

Status: [All ▾]

Enter a **keyword, reference number, postcode** or **single line of an address.**

❓ [   ]   [Search]

2. 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. Choose the appropriate option from the **Status** drop down list.
5. 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" (equiva-

lent to "%10%High%Street%") may find results of "10-12 High Street" or "The Swan, 10 High Street".

6. Click on the **Search** button to display the results of your search (see "Search Results" on page 36).

Advanced Search

An advanced search allows you to build a complex combination of specific criteria on which to search for information. You can insert or select details in any combination of fields to restrict the cases returned.

1. From the **Search** drop down list, select the relevant module, and then **Advanced Search**.

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

3. A variety of reference numbers are associated with planning records. Enter one or more to help identify a specific record.

4. The details you can fill in depend on the record type selected. Enter the details you want to search on.

   If you don't enter details in a field, it just means it won't be used to restrict the cases returned.

5. Every planning 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 36).

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, select the relevant module, and then **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 which records to display.

7. Click on the **Search** button to display the results of your search (see "Search Results" on page 36).

Property Search

The property search feature allows you to search for a specific property in the gazeteer. 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, select the relevant module, and then **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 36).

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, select the relevant module, and then **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.

A to Z Street Search

Click on a letter below to get a list of streets beginning with that letter. Clicking on a street will display a list of properties on that particular street.

| Simple | Advanced | Weekly/Monthly Lists | **Property** | Map |

| Address Search | **A to Z Street Search** |

A B C D E F G H I J K L M N O P Q **R** S T U V W X Y Z

Results per page [10 ▼] [Go]

Streets beginning with R

- Regent Street East , Neath , West Glamorgan
- Regent Street West , Neath , West Glamorgan
- Ritson Street , Neath , West Glamorgan
- Rockingham Terrace , Neath , West Glamorgan
- Ruskin Street , Neath , West Glamorgan

4. Select a street from the list to display the addresses on that street, then choose an address to discover whether any applications 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 applications, appeals or enforcements 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.

Notes

- This mapping functionality is not available for Acolaid, however, an external web link may be enabled.
- The mapping functionality may not be available on mobile devices.

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.
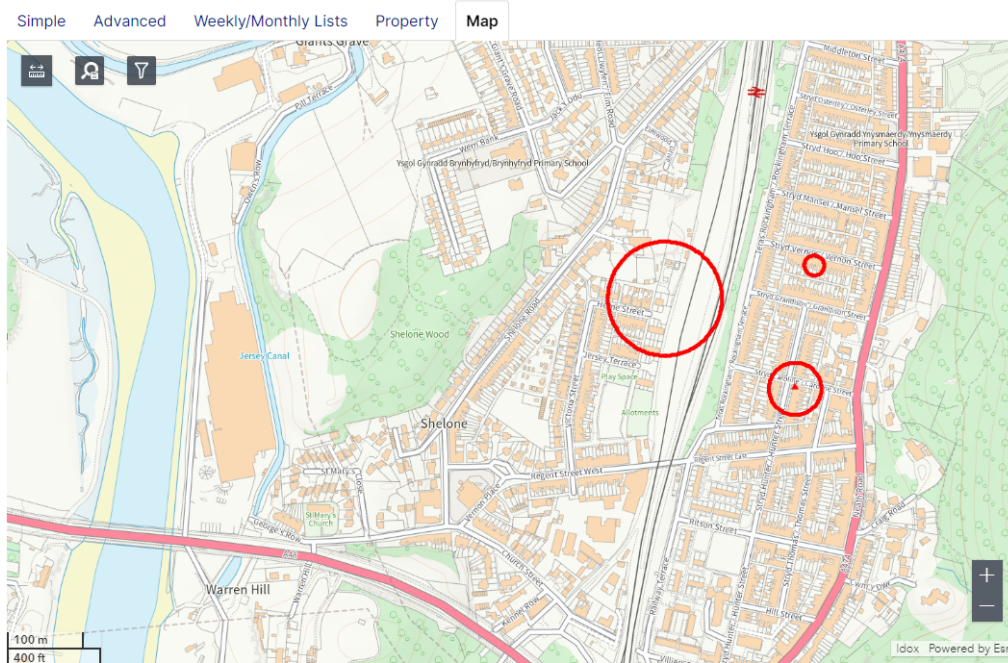
1. From the **Search** menu select the relevant module, and then **Map Search**.

The initial view shows applications submitted within the last six months.


2. To zoom in on a specific location, drag the map to centre on the location 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 pressed down, drag in the direction you want to pan.
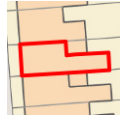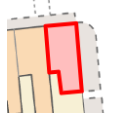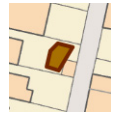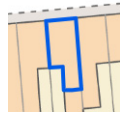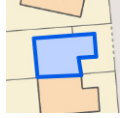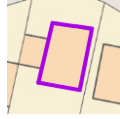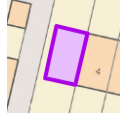
4. To refine the display, click on the **Change what you see on the map** button .
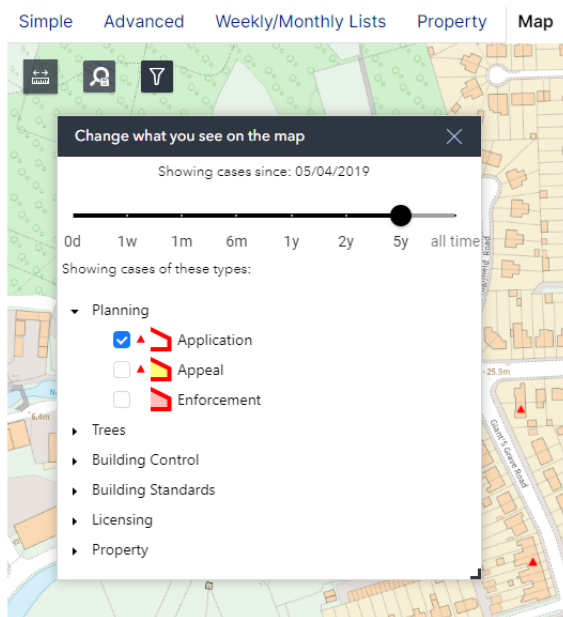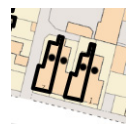
5. The initial view displays applications submitted within the last six months. To change the time period select from the **Time Period** drop down list.
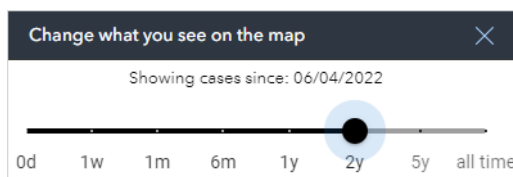
6. To display more record types on the map, check the relevant boxes in the **Show cases of these types** list. To remove record types from the map, uncheck them.

   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.	
	Enforcements - 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.	
	Licences - properties which hold one or more licences.	

| Module	Record type	Displayed As
All	**Properties** - 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.
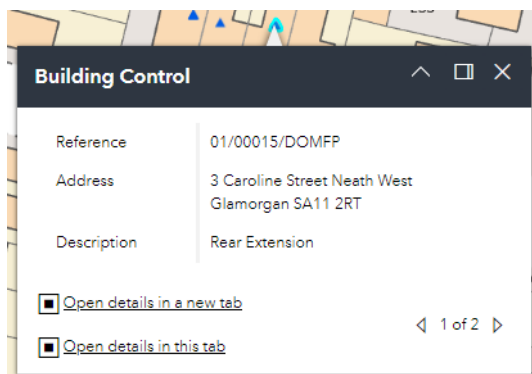
If there is more than one record associated with the property, you can click on the navigation arrows to page through the record summaries.

8. When the black Properties markers are displayed, you can click on any of these to view the property summary.
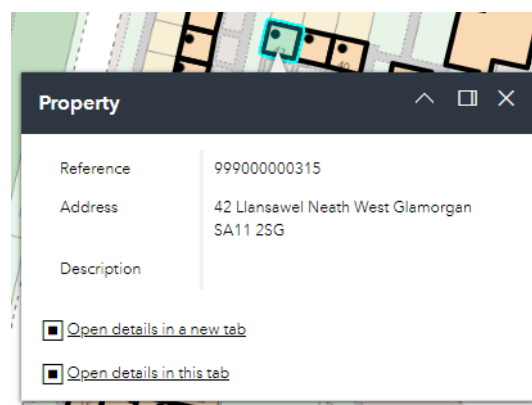
9. To view full details of a property or record of interest, with the summary information displayed, click one of the links at the bottom of the summary window to either view the details in the current tab or a new tab in the browser.

Map measurement

You can take rough measurements of distances and areas 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.

To measure an area or distance:

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.
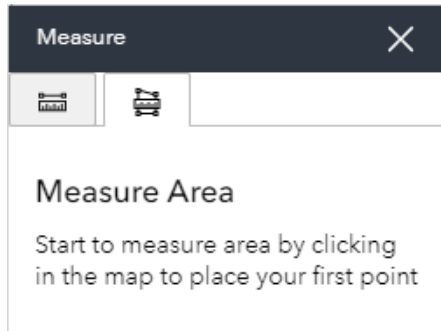
4. Click on the map where you wish to start your measurement.
5. Continue to click on each corner of the area of measurement.
6. Double click on a point to complete the area.
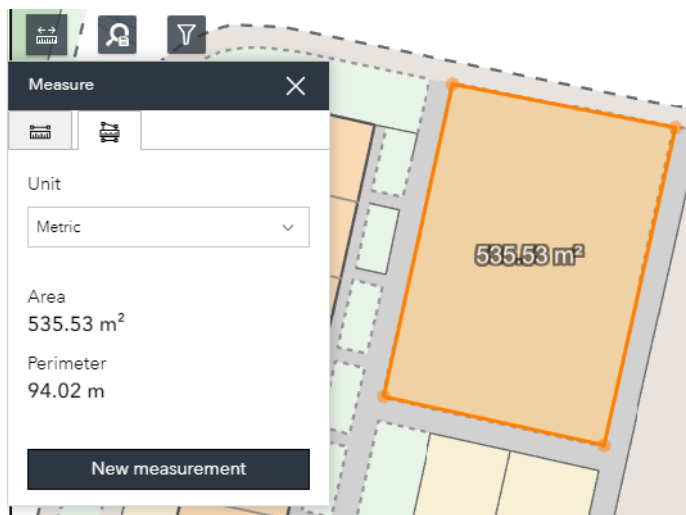
7. To change the units used for the measurement, select the new unit from the **Unit** list.
8. To start a new measurement, click the **New Measurement** button.
9. **To measure a distance on the map**, click the Distance icon.
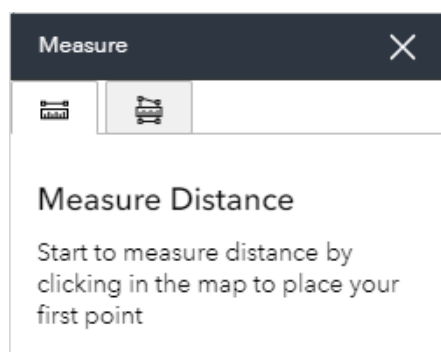
10. Click on the map where you wish to start your measurement.
11. Continue to click on each corner of the distance of measurement.
12. Double click to complete the measurement.
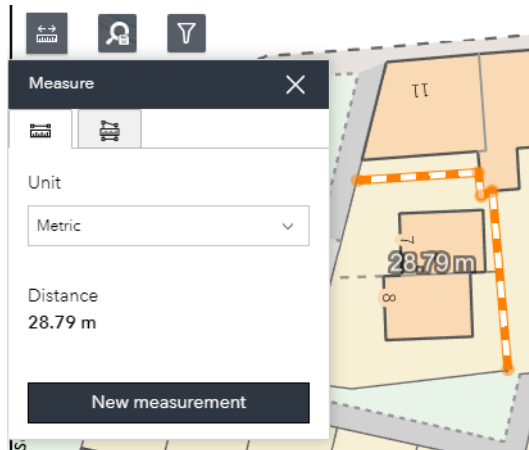
13. To change the units used for the measurement, select the new unit from the **Unit** list.
14. To start a new measurement, click the **New Measurement** button.

Saving map searches

As long as you're logged in, 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 planning 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. Click on the **Change what you see on the map** button ▽.
3. Select the required time period, and select just one record type from the **Show cases of these types** list. For full details, see "Map Search" on page 25.

4. Click on the **Save map searches to registered account** icon .

This map is reproduced from Ordnance Survey material with the permission of Ordnance Survey on behalf of the Controller of Her Majesty's Stationery Office Crown copyright. Unauthorised reproduction infringes Crown copyright and may lead to prosecution or civil proceedings. COUNCIL NAME, Licence No. LICENCE NUMBER (2024).

5. In the **Save a rectangular search...** section, click on the **Save** button.

6. On the **Save Search** page, change the default search title if required.

7. 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 13).

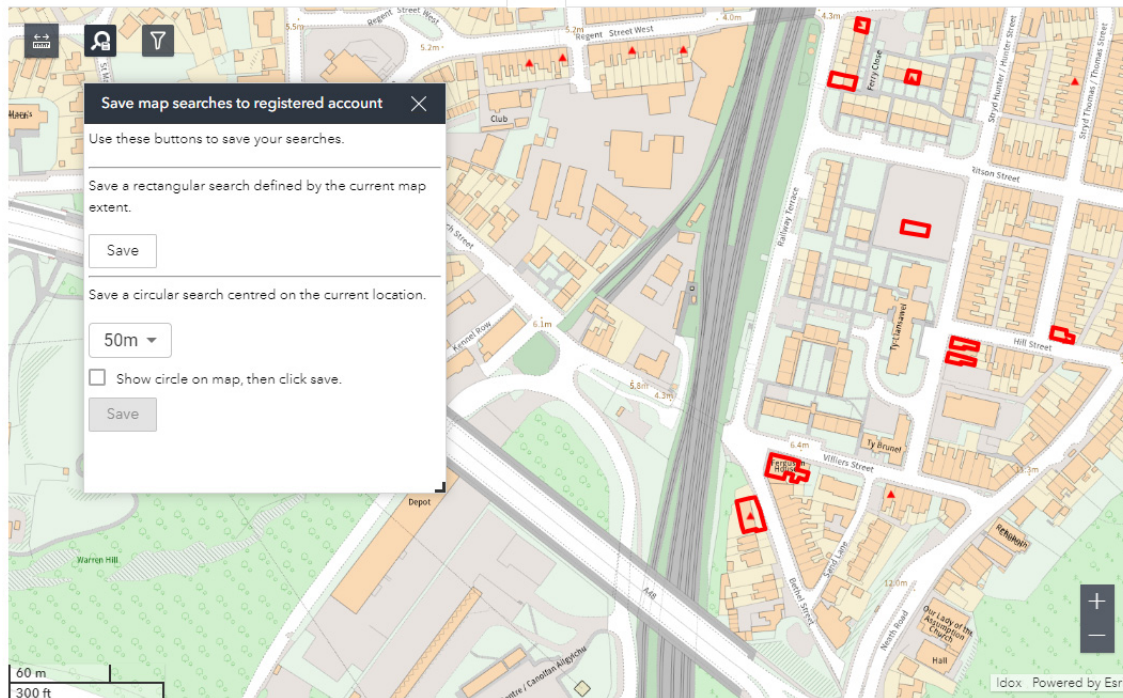8. Click **Save** to save the search to your list of Saved Searches (see "Saved searches" on page 11).

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 planning applications arising within a specified distance of your home on a yearly basis.

1. Zoom and pan the map to display the geographical area of interest.

2. Click on the **Change what you see on the map** button .

3. Select the required time period, and select just one record type from the **Show cases of these types** list. For full details, see "Map Search" on page 25.

4. Click on the **Save map searches to registered account** icon .

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

6. Select the **Show circle on map** checkbox to display the proximity as a circle around the centre.
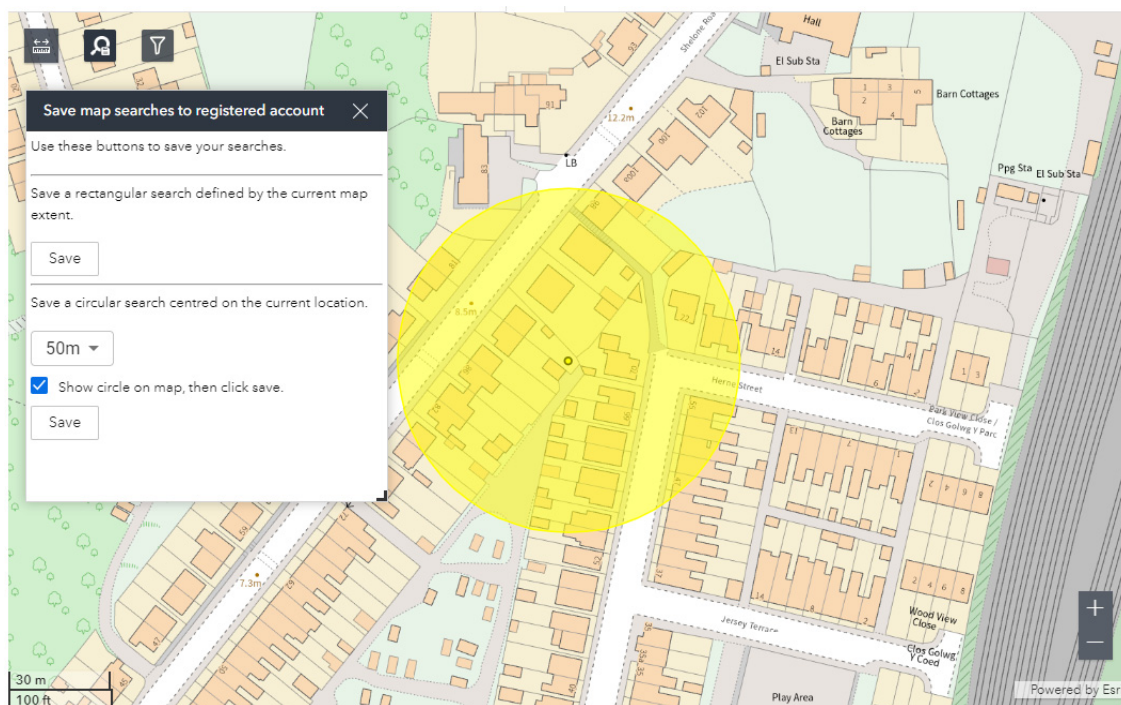
This map is reproduced from Ordnance Survey material with the permission of Ordnance Survey on behalf of the Controller of Her Majesty's Stationery Office Crown copyright. Unauthorised reproduction infringes Crown copyright and may lead to prosecution or civil proceedings. COUNCIL NAME, Licence No. LICENCE NUMBER (2024).

7. If you want to make adjustments to the area of the search, deselect the checkbox, pan the map, and then reselect the checkbox.

8. Click on **Save** under the Show circle on map checkbox.

9. On the **Save Search** page, change the default search title if required.

My Profile – Save Search

Saved Search Options

Search Title (editable)	Map Building Control Application 11-Mar-2024
Notify me via email about new search results	○ Yes ● No
Last Run Date	Search not run yet.

Save   Cancel

10. 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 13).

11. Click **Save** to save the search to your list of Saved Searches (see "Saved searches" on page 11).

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
BC	Building Control Applications
BCC	Building Control Contraventions
BS	Building Standards Applications
BSN	Building Standards Notices
ENF	Planning Enforcements

Case Type Code	Description
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.

Note A speech bubble icon attached to a record indicates that comments may be made about that record at this time

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, showing the location of each of the cases in this page of results. Click on **Show results on large map** to see the locations of this page of search results in greater detail (see "Map Search" on page 25).

> **Tip** A case will only be shown if a feature has been plotted for it on the map.

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. If the case description stretches to more than two lines, to view the full description, click the **Show more description** link beneath the second line.

7. 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 application. As a registered user you can save these searches to be run again from your Saved Searches page (see "Saved searches" on page 11). 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 13).

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. (See the relevant Idox Public Access User Guide for details).

1. Click on the relevant tab to view the information of interest.

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 12).

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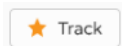
2. To find this case again, select **Tracked Applications** under **My Profile**.
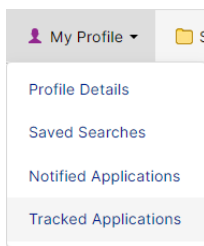
3. To stop tracking an application, return to the application details and click the **Stop Tracking** button at the top of the page. Alternatively, click the Stop Tracking button next to the application in the Tracked Applications page.

My Profile – Tracked Applications   ❓ Help with this page

| Profile Details | Saved Searches | Notified Applications | **Tracked Applications** | | |

View	Stop Tracking	Reference ⬍	Address ⬍	Type ⬍	Status ⬍
🔲	✖	24/00004/FUL	7 Caroline Street Neath West Glamorgan SA11 2RT	Application	Received
🔲	✖	23/00001/DAL	69 Shelone Road Neath West Glamorgan SA11 2PT	Building Control	Received
🔲	✖	AC-00003	5 Caroline Street Neath West Glamorgan SA11 2RT	Licence Application	

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

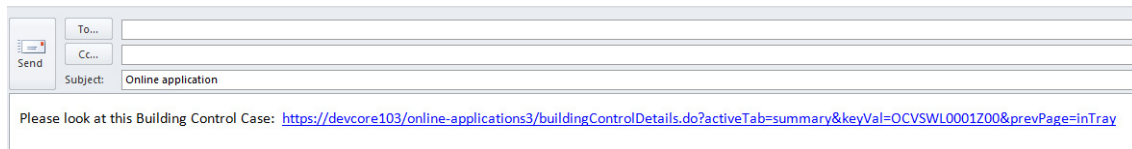To share comments or activity through email:

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.