iApply

User Guide

This guide was last updated on 05 October 2018.

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Chapter 1

Introduction

This guide explains how to use iApply, which provides an efficient and supportive process for members of the public and professional services (such as architects and agents) to apply for planning or licensing permission and submit applications to building control.

The online process provides easy-to-use forms to enable you to send in planning, licensing and building control applications online, with the relevant forms, documents and fees.

- Most of the functionality in iApply is based around **projects**. You create a project for the development you want to apply for, and then add planning, licensing and building control application forms to it. You can then fill in the forms and add anything else needed for each application, such as plans, documents, payments, and so on, before submitting the application online.

  For more information, see Projects on page 11.

- If you are part of an organisation, you can also **share** your projects, either with individual users or members of an **organisation** set up in iApply. This enables other members of your organisation to view or edit your project, so they can give advice or make changes as required.

  For more information, see Sharing and organisations on page 37.

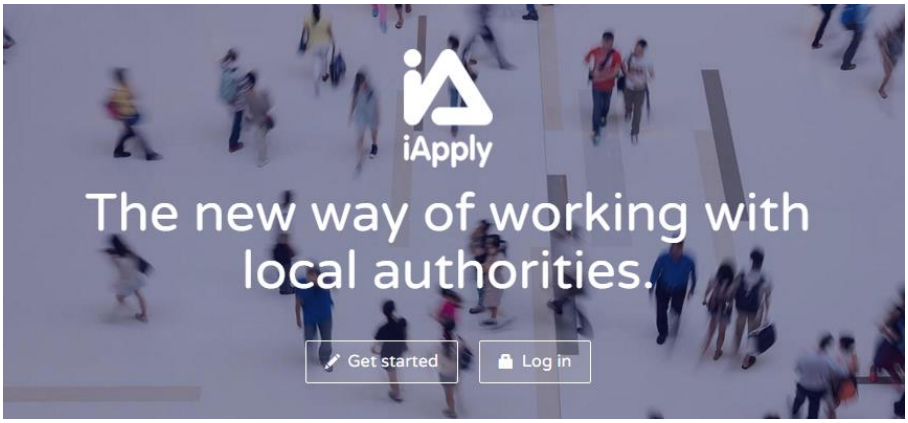
Note: This User Guide may describe functionality to which you do not have access or which appears to differ slightly from your system.

Accessing iApply

Creating a user account

Before you can use iApply to manage planning and building control applications, you must first create a user account.

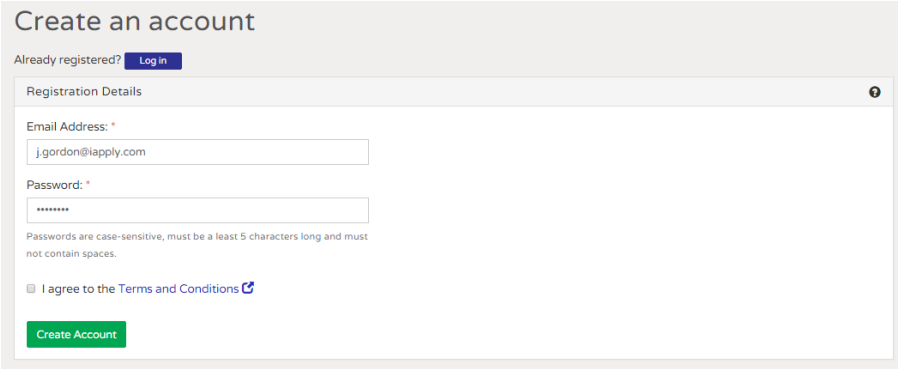
1. To create a new user account, click on the **Get Started** button on the Home page.



2. Register your personal details by filling in the following fields.
   - **Email Address:** Type your email address.

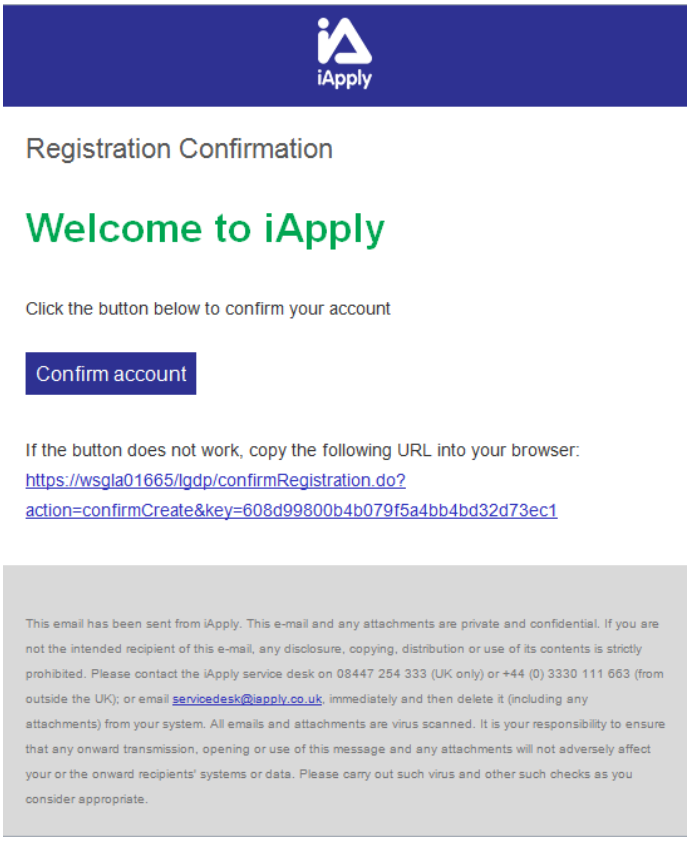
     This is the email address that you will use to log into iApply, and will be the address that the account confirmation email will be sent to.
   - **Password:** Type a password that will allow only you to access your iApply account. Type it again in the **Confirm Password** field to confirm it.

     Note: Passwords must be at least five characters long and must not contain spaces.

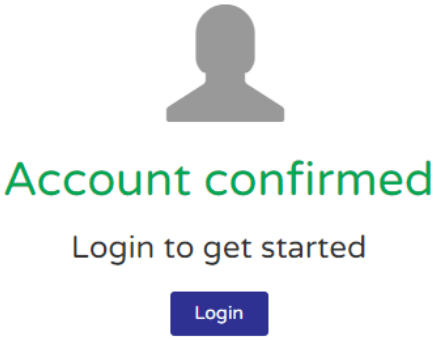


3. Click the **Terms and Conditions** link to read the terms and conditions that apply when you use this site. When you have read them, tick the checkbox to show that you agree to them.
3. When you have entered your personal and login details, click on the **Create Account** button.
4. We will send you an email to the address you entered. This provides final confirmation that you want to create an iApply account. When the email arrives, click on the **Confirm account** button to be returned to iApply.

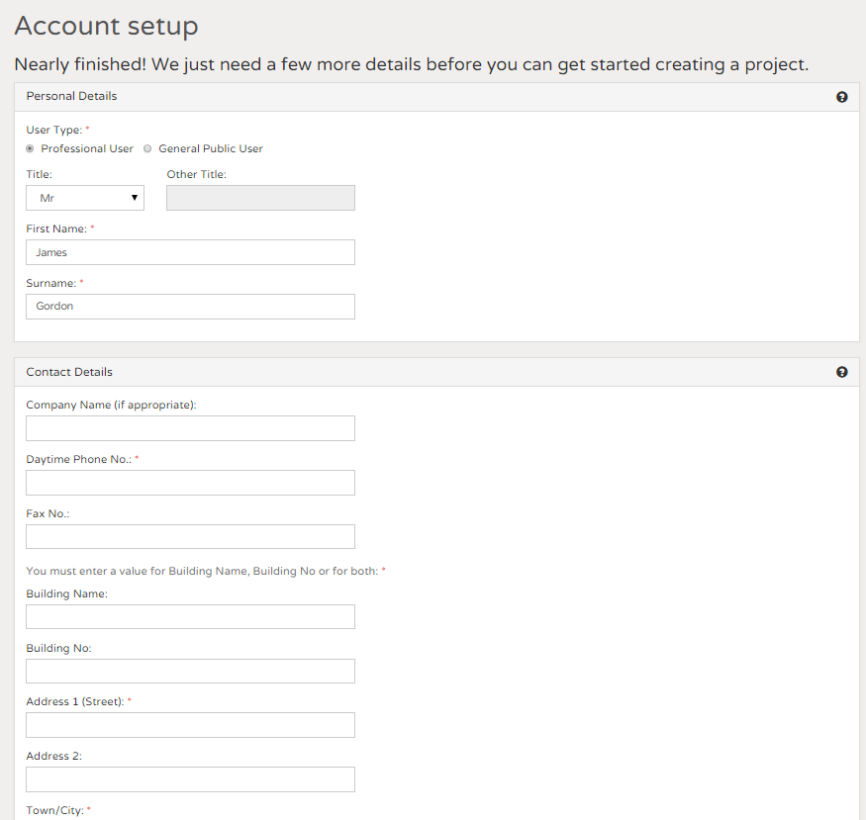
   Note: If the email does not appear in your inbox, it may have been flagged and appear in your Spam folder.



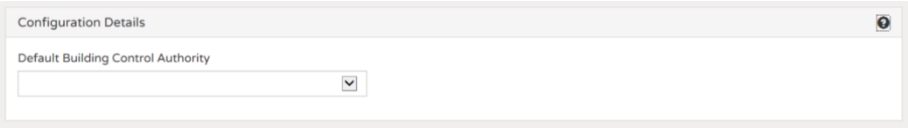
5. When you click on the button, your account will be confirmed. Click the **login** link to log into your account.



6. Type your email and password, and click the **Login** button to display the final account creation page.



7. In the **Contact Details** section, type your **Company Name** (if applicable), **Daytime Phone No**, **Fax No** (if applicable), and address details.
8. In the **Configuration Details** section, select the **Default Building Control Authority** that will be used by default as recipient of all your Building Control applications.



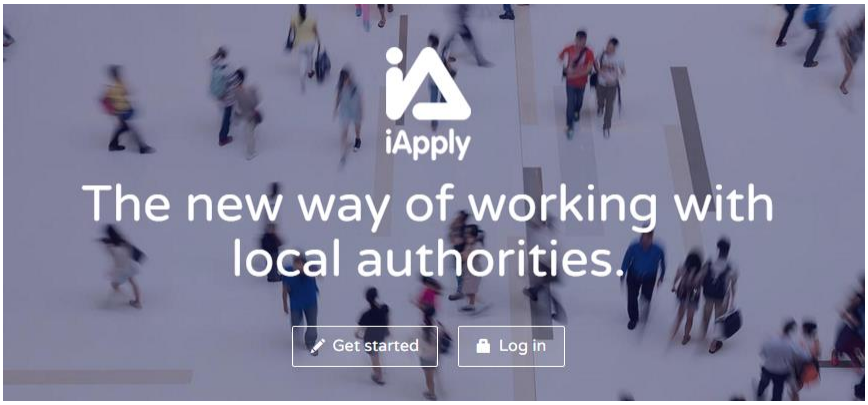
9. Click the **Save Account Details** button to finish.

Your account is now complete and you may start using it.

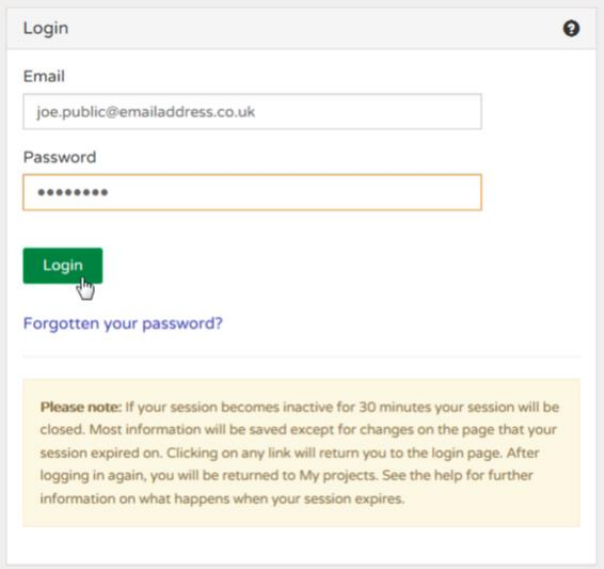
Logging in

To use iApply, you need to log in using the email address and password you provided when you created your account.

1. Click on the **Login** button on the homepage.



2. Type your email address and password, then click on the **Login** button.



On logging in, you will normally be taken to the My projects page, which lists the projects you have created and/or have been given permission to view or edit. Projects are where you record all the information the authority needs about your development, before submitting it for approval. For more information, see Projects on page 11.

Note: If your session was timed out (as explained below), you may be taken to another page on logging in.

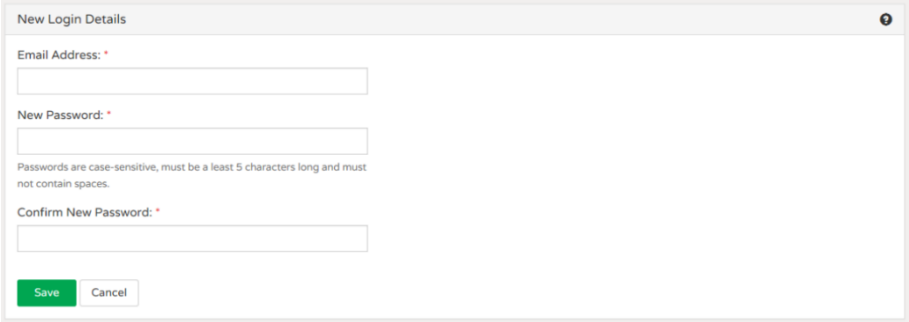
If your session times out

After a period of inactivity (usually 30 minutes), your session will automatically be logged out – if you attempt to continue with what you were doing, you will be returned to the login page. To continue working, you must log in again. Once you have done so, you will either be returned to the page you were on, or the My projects page, if you were on the project details page.

If you forget your password

If you forget your password:

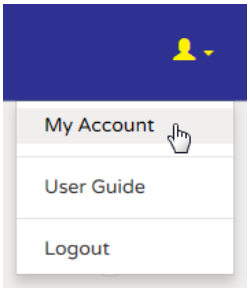
1. On the login page, click on the **Forgotten your password?** link.



2. Type your email address and then type a new password twice. Press the **Save** button.
3. We will send you a confirmation email to your email address. When it arrives, click on the confirmation link. You will now be able to log in with your new password.

Managing your account

Once you have set up your account, you can edit your details, change your password, or unregister the account from the My Account page. To access this, click the user icon  at the top right of any page, and select **My Account** from the menu displayed.

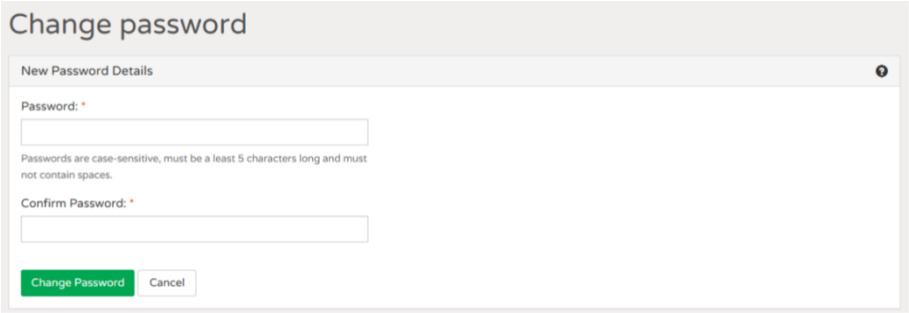


This opens a page listing the details you entered for the account when you set it up.

Changing your password

To update your password:

1. Go to your My Account page, and click on the **Change Password** button.



2. Type your new password then type it again to confirm it. Click on the **Change Password** button to save the new password.

3. We will send you a confirmation email to your email address. When it arrives, click on the confirmation link. You will now be able to log in with your new password.

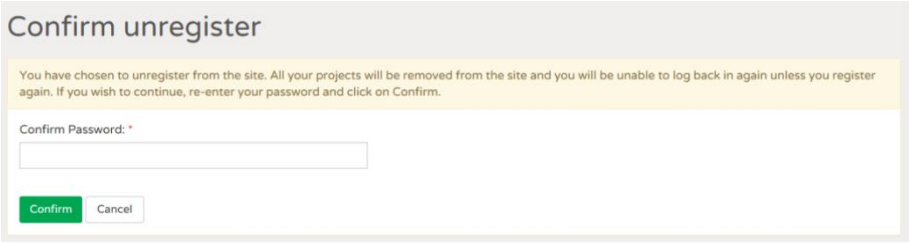
Unregistering your account

If you no longer want to use iApply, you can remove your details by unregistering.

Note: If you are an organisation administrator, you must first transfer your administrator rights to another user or delete the organisation before you can unregister your details. For more information, see Organisations on page 40.

To unregister your account:

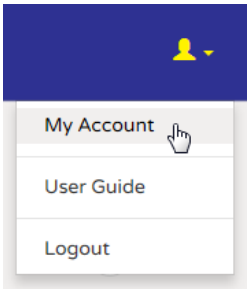
1. Go to your My Account page, and click on the **Unregister** button.



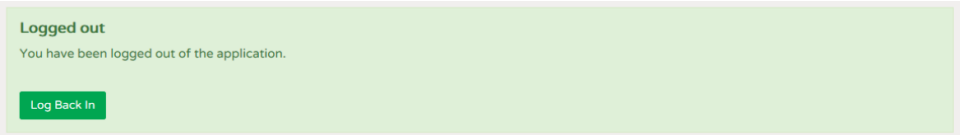
2. Confirm that you want to remove your details from iApply by typing your password in the **Confirm Password** box.
3. Click on the **Confirm** button.

Logging out

When you have finished in iApply, you should log out properly for security. To do this, click the user icon  in the top banner of the page you are on, and select **Logout** from the menu displayed.



A page is displayed confirming that you have been logged out of the system. You can now log in again, close the browser, or navigate to another website as normal.



Chapter 2

Projects

The main purpose of iApply is to help you create, manage and send in planning, licensing and building control applications. All of this is done in your My projects area.

A project includes a number of activities. Your My projects area provides a number of tools to help you to work out which activities you need to do and enables you to keep track of their status until your project is ready to send in.

Project activities

You may need to carry out the following activities to complete your project.

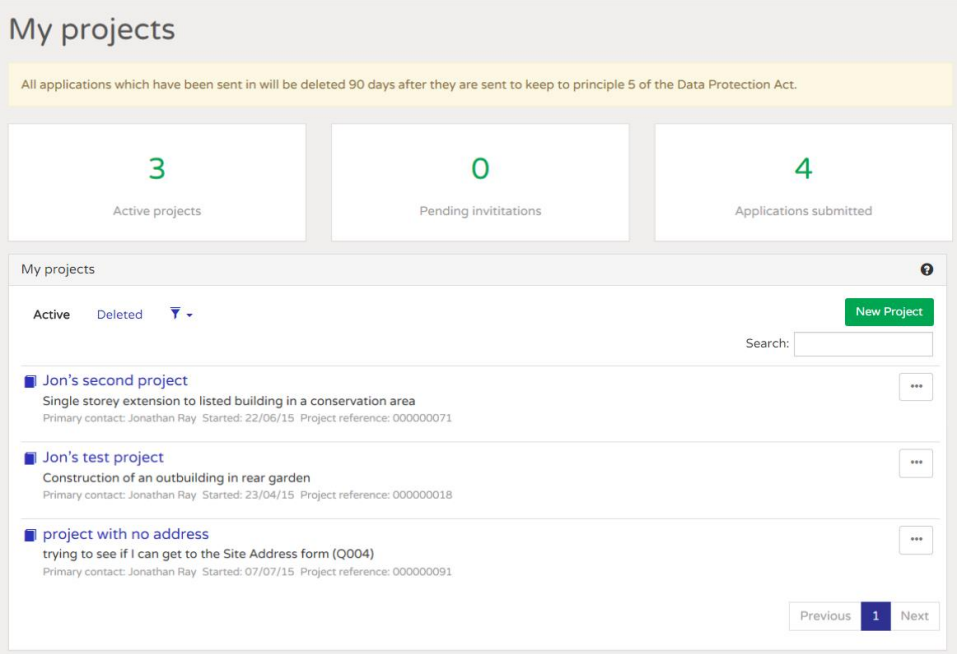
- **Do you need planning permission?** Decide whether your project needs planning permission.
- **What is the address of the project?** Choose which address or location the project refers to.
- **Fill in appropriate forms:** Decide which forms you need for your project and fill them in.
- **Attach location plans:** Add a location plan covering the development area. If you do not already have access to location plans, you can buy these via iApply.
- **Attach supporting documents:** If you need additional drawings, plans, images, or reports to support your application, you can upload these and submit them with your application forms.
- **Send in certificates:** Sign and send in any certificates which are needed.
- **Pay fees:** Work out which fees will apply and pay the total amount.

As your projects will stay active until you send them in, you can carry out these activities at different times until your project is ready.

My projects

Your My projects page displays all of the projects in which you have some involvement. The page displays a quick view of the number of active projects, pending invitations and applications submitted within your account.

- **Active projects:** displays the number of projects that user is the primary contact for.
- **Pending invitations:** displays the number of invitations that you have not yet responded to in order to view or edit an application.
- **Applications submitted:** displays the number of applications you have successfully submitted within iApply.



This page is normally the first one displayed when you log in. You can also access it by selecting **My projects** in the banner at the top of any page.

From here, you can create new projects, as described in **Creating a project** on page 13.

In addition, you can click the Filter button and then:

- Click on **All** to display all of the projects available to you. These will include your own projects, as well as projects that you have been invited to contribute to, either as a viewer or an editor.
- Click on **I manage** to display only the projects you are the primary contact for.
- Click on **I can edit** to display the projects you have been allowed to contribute to as an editor.

- Sort the listed projects in a number of ways.
  - **Project Name:** Sort alphabetically by the name of the projects.
  - **Primary Contact:** Sort alphabetically by primary contact.
  - **Project Reference:** Sort by the project reference.
  - **Date Started:** Sort by the date you made your projects (this only applies to projects you own).

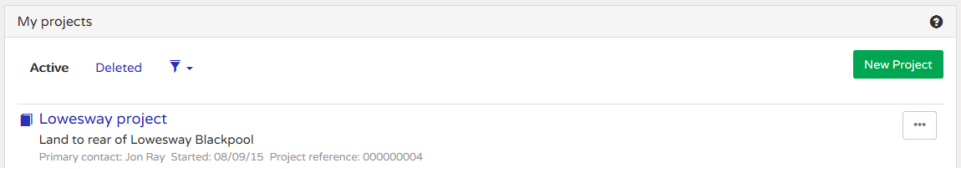
Another way of filtering projects is by using the **Search** feature to locate a project by entering known information, for example, the project start date, reference number or project name.

Active projects are projects currently in progress. When a project has been completed and sent in, you can delete it. You can see deleted projects in the **Deleted** area, for a period (specified by the authority) after they have been deleted.

Clicking on a project on the My projects page opens summary details of the project, from where you can perform other tasks such as submitting applications – see Completing a project on page 19.

Viewing the application status

The application status dashboard More button ••• will be displayed at the end of the row for each project on the My projects page.



Clicking on this button will display a list of the applications in the project, along with each application's status, the list of case references associated with the application and links to Public Access.

The application status will display a list of applications along with the latest status of each. The following statuses can be seen during an application lifecycle:

- **Draft:** the application has not yet been submitted for validation.
- **Received:** the application has been received and has a received date.
- **Validated:** the application has been validated and has a registered date.
- **Consultation:** the application is in the consultation phase.
- **Pending Consideration:** the application is awaiting a decision.
- **Determined:** the application has decided decision and decision date.

Creating a project

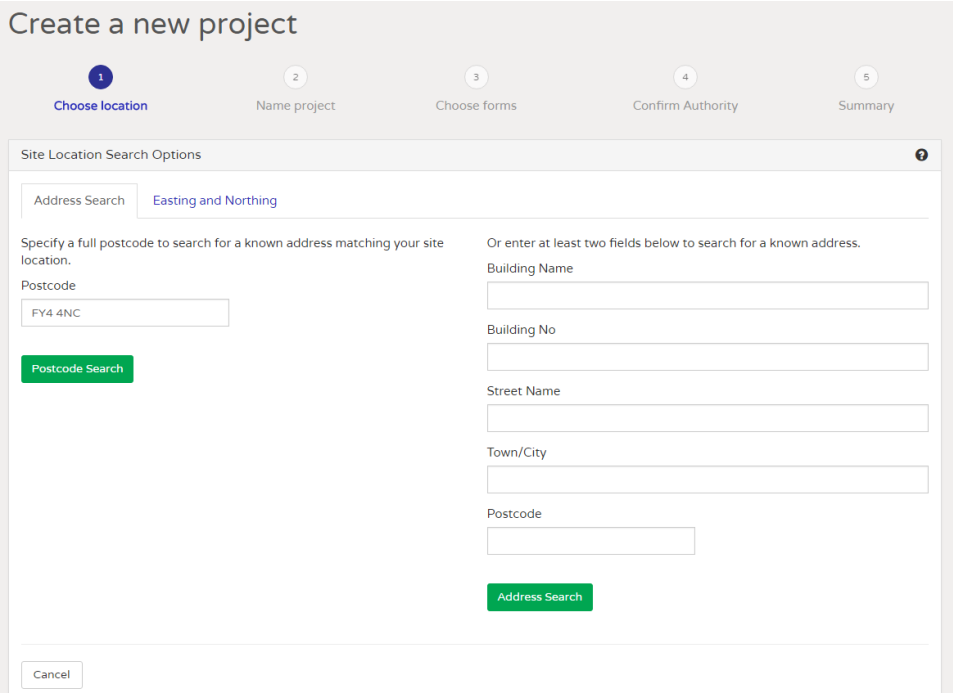
To create a new project:

1. Click on the **New Project** button on the My projects page.
2. Identify the location of the project site using one of the following options.
   - **Address Search:** The address of the property.

– **Easting and Northing:** You would use this option to identify the coordinates of a location where you cannot find an exact address.

Searching for an address

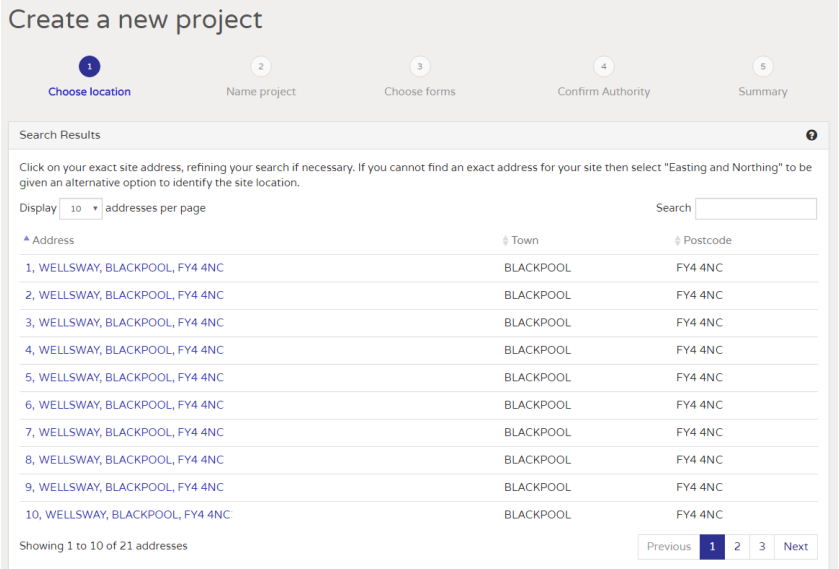
If the address of the project is a building and you know the address or part of the address, you can enter that here.



1. If you know the postcode, enter it into the Postcode box and click on **Postcode Search** to display the search results list.
2. Alternatively, do the following:
   a. Enter at least two pieces of information into the fields on the right.

      You don't have to enter information in every field, but the more information you supply, the easier it will be to find the correct address.

   b. Click the **Address Search** button to display the search results list.



3. Find the correct address in the list. If necessary, sort the list according to the address, the town or the postcode by clicking on the links at the top of the list.
4. If there are lots of results, you can choose how many to display on one page by selecting a number from the **Display** list. Move between pages by clicking on the **Results Page** number you need.
5. When you have found the correct address, click on it to select it.
   – If there are too many results in the list, click on the **Refine Search** button to return to the **Address Search** page and enter more information.
6. Review the details, then click on the **Confirm Address** button.

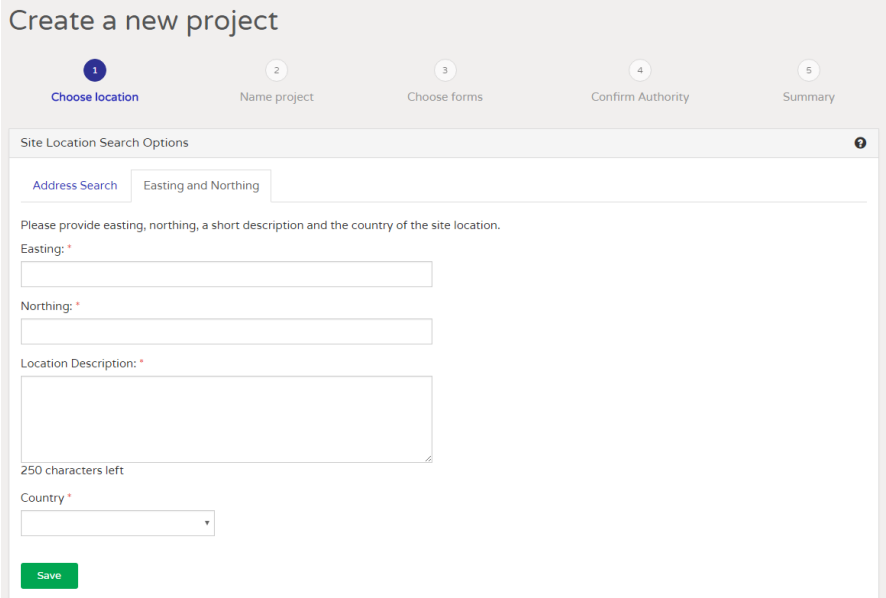
   Note: If you discover a minor mistake in your address details, we recommend that you complete your project and then email your local authority to report the mistake.

You now need to name and describe the project – see Entering the project name and details on page 16.

Recording eastings and northings

If you know the coordinates that the site covers, you can enter the easting and northing values of a site location here along with a description.

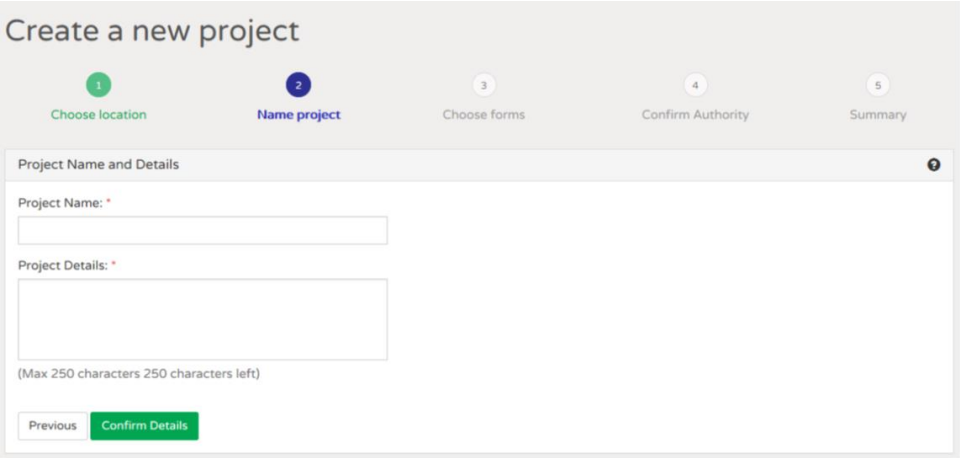
1. Select the **Easting and Northing** tab.



2. Enter the coordinates into the appropriate text boxes.
3. It is recommended that you agree a description of the site location with the local authority. Enter your description of the site location in the **Location Description** box, then click on Save.
4. You will be asked to check and confirm the description that you entered, then click on **Confirm Address**.

Entering the project name and details

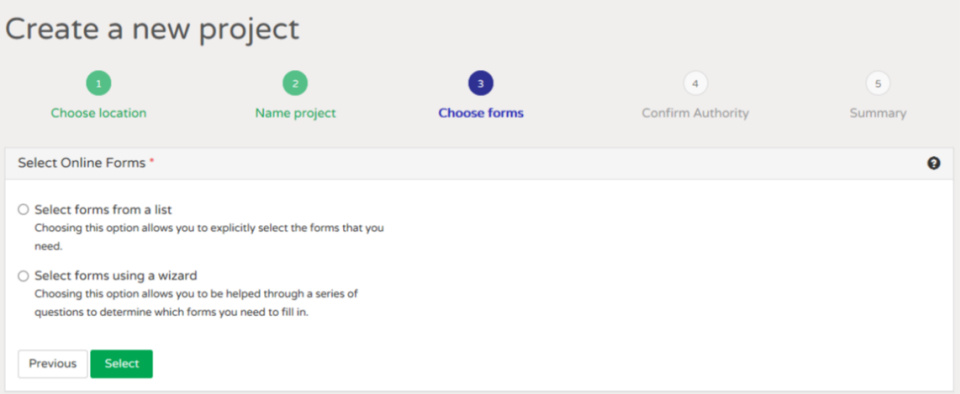
You now need to name the project and give it a short description.



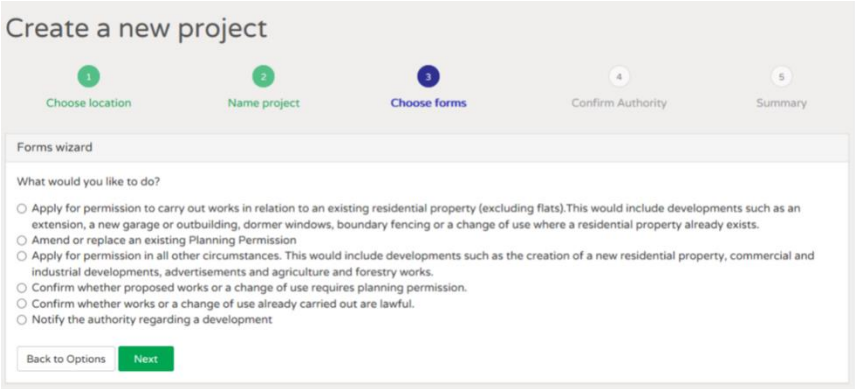
1. The location address will automatically populate the **Project Name** box, this may be changed if you want to use an alternative project name.
2. Briefly describe the project in the **Project Details** box.
3. Click on **Confirm Details**.

Selecting online forms

At this stage you can choose which forms you will need to fill in and send with the application.

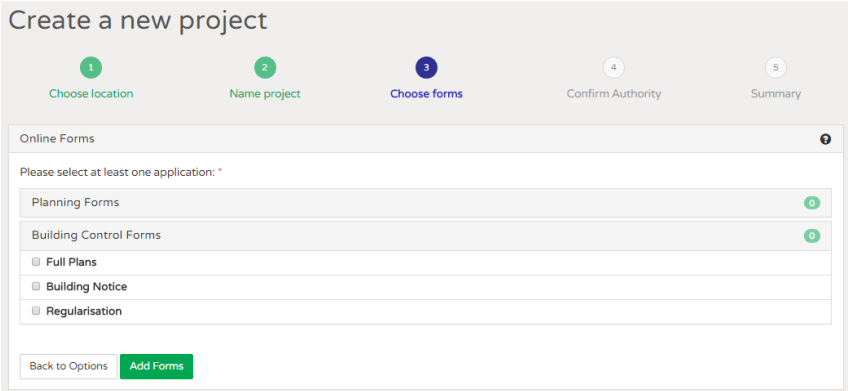


1. From the options provided, choose one of the following and press **Select**.
   - **Select forms using a wizard:** We recommend this if you are not sure about the planning process.



   This wizard leads you through a number of questions related to the nature of your project. Once you have answered the questions on each page, the wizard will recommend one or more forms need to fill in with your application. The wizard selects only the forms you need. It does not offer forms that might be suggested as possible or optional.

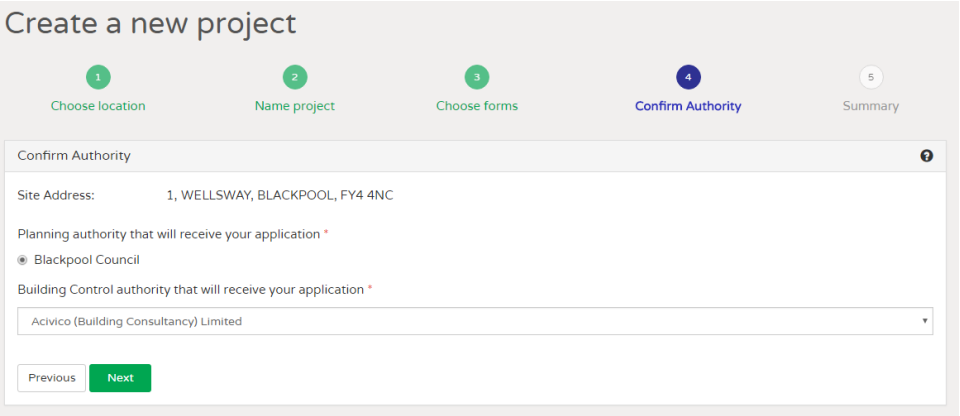
   - **Select forms from a list:** If you are a little more experienced with the planning and/or building control process, and know which forms you will need, you can choose the forms appropriate to your application directly.



2. Expand the forms list by clicking on the desired form type.
3. Once you have chosen the correct forms, click on the **Add Forms** button.

Confirming the authorities

Once you have chosen the forms, you will need to confirm the planning, licensing and/or building control authority to send the applications to. If you selected an address for the project and selected at least one planning form, the appropriate planning authority will be displayed, and you will just need to select the building control authority.

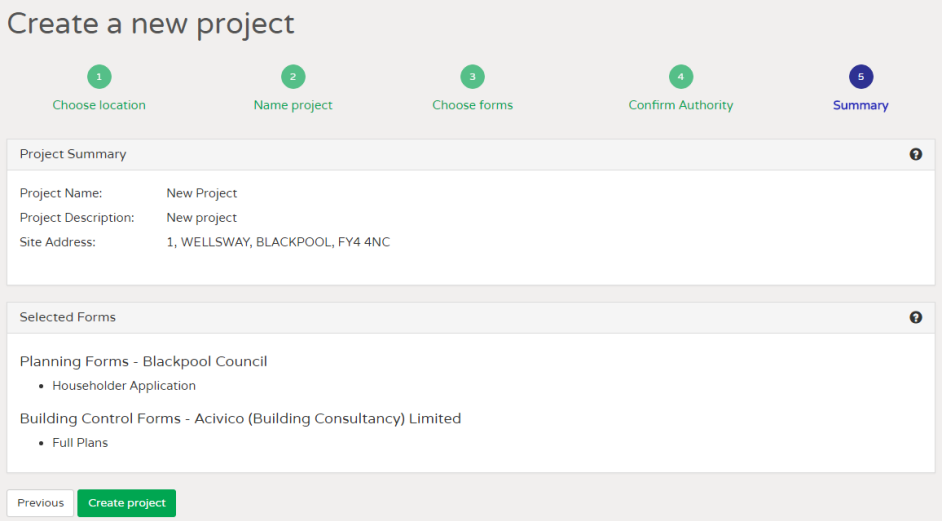


1. If a planning authority is displayed, check that it is the correct one:

   If it is not correct, please contact the relevant authority direct. You can find the authority contact details on the Project summary page – see Completing a project on page 19.
2. Select the appropriate authorities for any other forms selected.
3. Click the **Next** button.

Reviewing the summary and creating the project

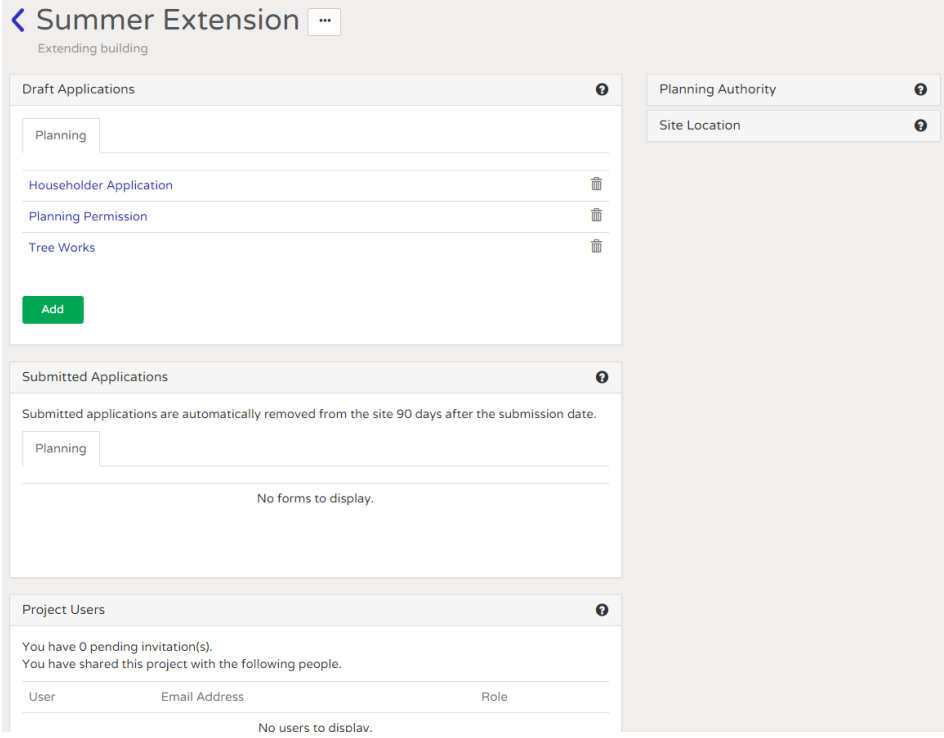
Once you have confirmed the authorities for the project, summary details will be displayed.



Check the details. If they are incorrect, you can click the **Previous** button and amend the details as required. If the details are ok, click the **Create Project** button.

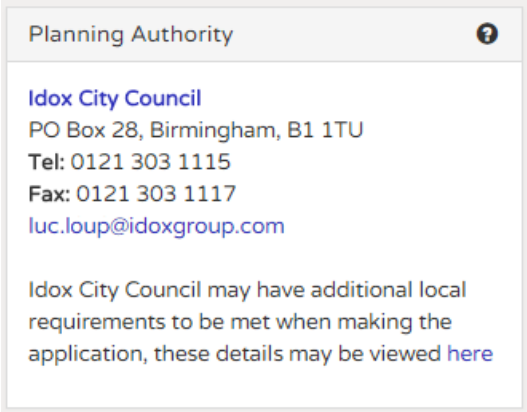
Completing a project

On creating a project, you are taken to the Project summary page. You can also access this page by selecting the project on the My projects page.



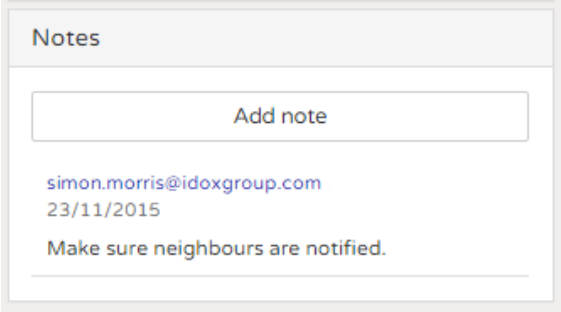
This page displays the application forms and other project details, such as the other users who can access the project. From here, you can:

- Fill in the application forms you selected when you created the project.
- Add new forms or copy existing ones.
- Review forms that you have already sent in.
- Edit the project details, if no submissions have been submitted for the project.
- Invite people to view the project and manage their roles. For more information, see Sharing and organisations on page 37.
- Contact the relevant planning or building control authority. To show the authority's contact details, click **Planning Authority, Licensing Authority** or **Building Authority** on the right of the page as appropriate. The details of the authority are displayed. If additional local requirements are indicated, click on the **here** link to view these from the Council's website.



- Add notes to this project. Other users that have access to this project can see and add notes to the page. These cannot be edited or removed once created.

  Note: This functionality is available to users whom are part of an Organisation.



Amending project details

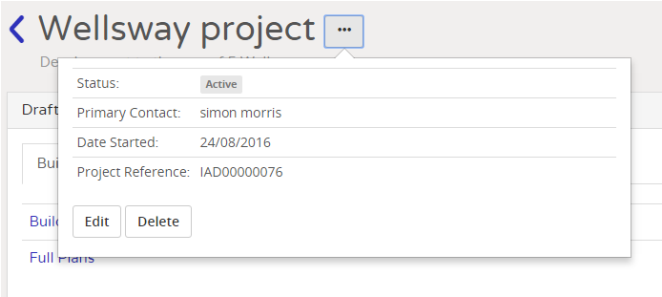
Before you submit the applications listed in the project, you can amend the following details for the project:

- The project name and description.
- The site location, if you did not specify an address when creating the project.
- The forms listed in the project's draft applications.

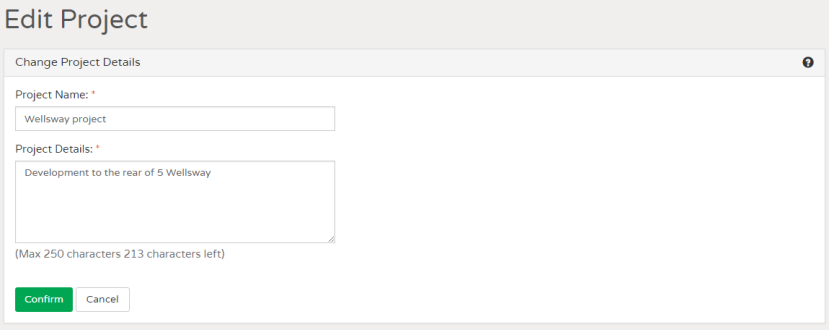
Amending the project name and description

Before you submit any applications, you can amend the project name and description from the Project summary page as follows:

1. Next to the project name, click the More button ···.



2. Click the **Edit** button to display the project name and description.



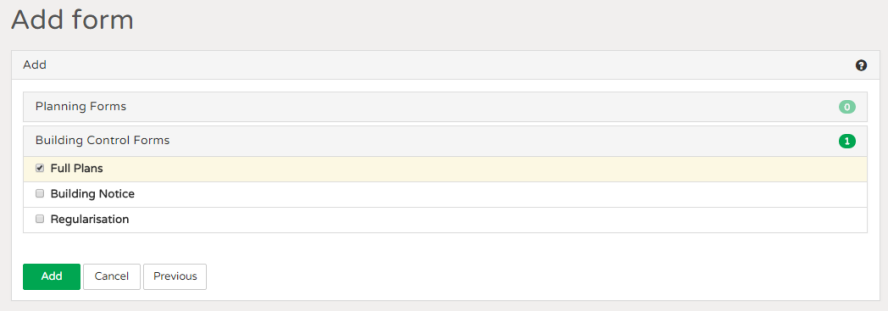
3. Change the details in the **Project Name** and **Project Details** fields as required, then click **Confirm**.

Adding application forms to a project

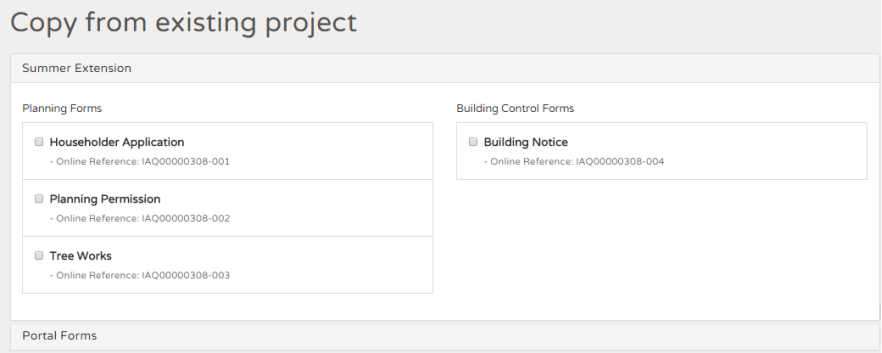
To add further application forms to a project from the Project summary page:

1. In the Draft Applications section, click the **Add** button.
2. Specify where you want to select the forms from, by selecting either **Add from a list of standard forms** or **Copy from an existing project**.

   Copy from an existing project allows you to copy a previous form which you have already created. This is useful if you need to use the same form with a different site address, as it prevents you having to input the same information twice.
3. Click on **Confirm**.
4. If you selected to add from a standard list, expand the form type heading and select the checkbox next to each form you want to add, and then click the **Add** button.



5. If you selected to copy from an existing project, click on the project in the list, select the checkbox next to each form you want to copy, and then click the **Copy** button.

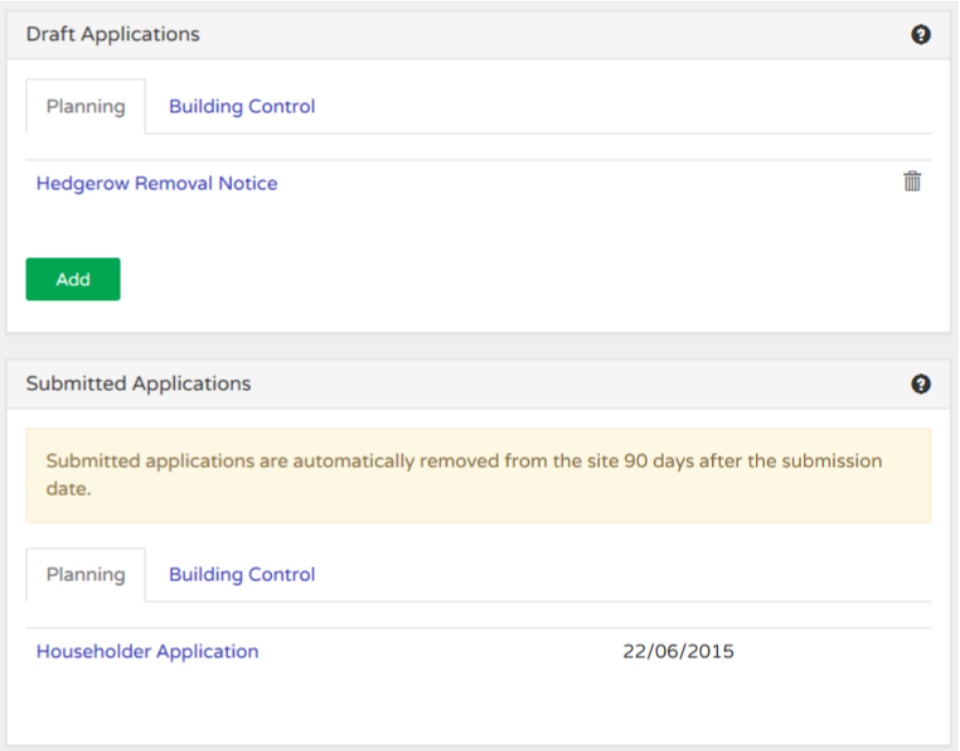


Completing applications

To send in your project, you need to complete all of the relevant applications. This process may include filling in the individual forms, providing supporting material such as location plans, providing certificates, and paying fees.

Working with application forms

If you have not filled in a form fully, it will be listed in the **Draft Applications** section of the Project summary page. You can delete any draft form by clicking on the **Delete** icon . You can also add additional forms, as described in Adding application forms to a project on page 21.

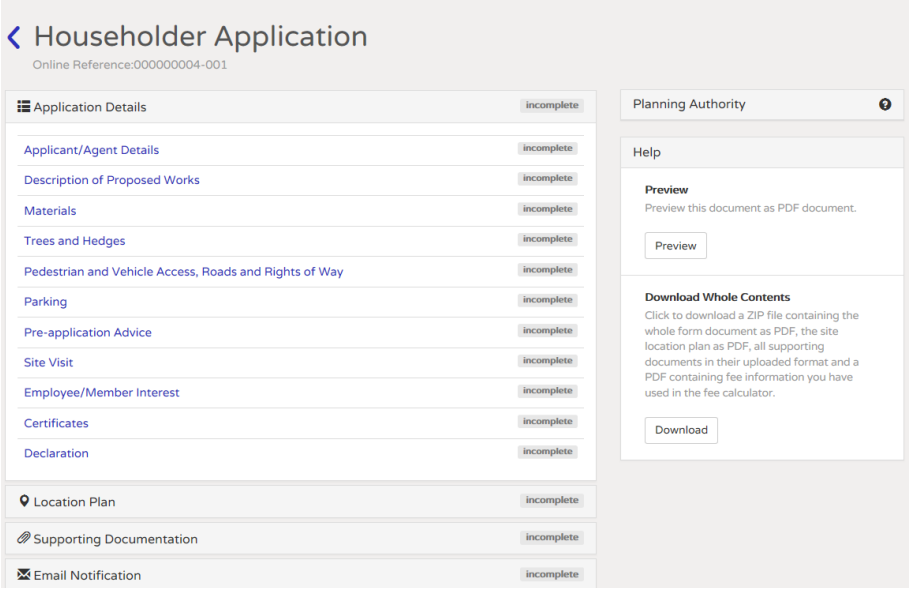


Forms which you have completed will be listed in the **Submitted Applications** area. These forms are kept for a period defined by the authority (specified in the Submitted Applications section), during which you can refer to them for information or copy them for use in other applications. The set number of days after you have sent a form in, it will be deleted from your application.

Filling in a form

In the Draft Applications section of the Project summary:

1. Click on the name of the application to access the **Application Summary** page.



2. In the **Application Details** section, each element of the application form has a status displayed. You need to fill in each element and change all of the status indicators to **complete**. Remember that you do not have to fill in an application all at once, you can log out and return to fill more of it in at a later time.
3. Click on an application form element to open it, and then fill in the necessary details.

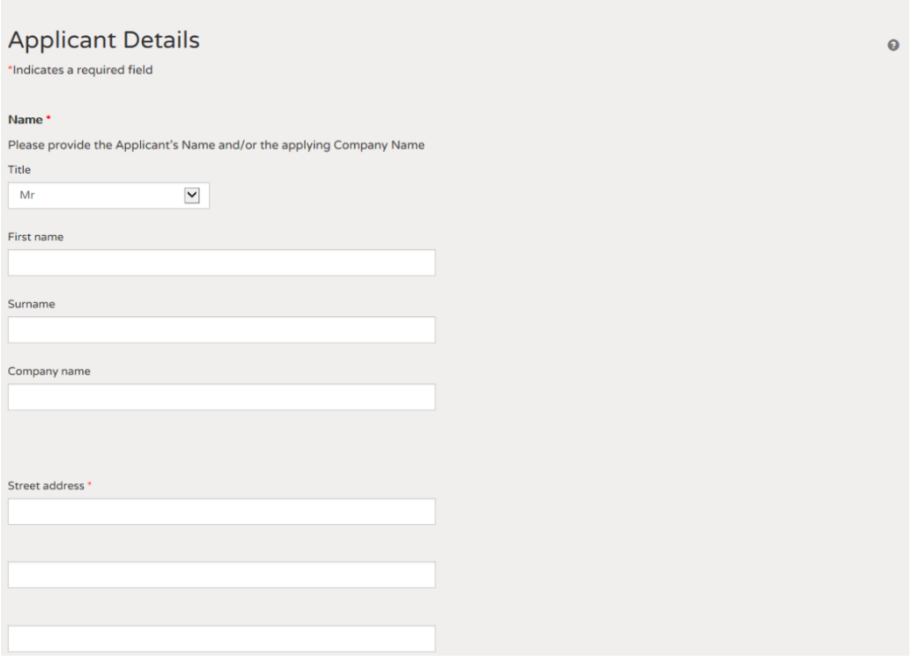
Filling in an application form element

The application form itself has a number of different elements. You need to fill in each of these elements. Depending on the type of application, these may include the following.

- **Applicant/Agent Details, Description, Site Area, and so on:** The main body of the application form.
- **Certificates of ownership:** Shows you the certificates of ownership you may need to provide and allows you to sign them electronically.
- **Declaration:** Enables you to review the application and sign an electronic declaration that it is accurate and a true representation of the information that you want to provide.

You can fill in each of these elements using a form wizard.

1. Click on the element to open the wizard.



2. Navigate through the form using **Next** and **Previous** buttons, answering the questions (if there are mandatory questions on the page you will not be able to go any further until you have answered these).
3. For information about filling in each page, click the help icon at the top right of the page.
4. You don't have to fill in a form element all in one sitting. You can save what you have done so that you can come back to it later by clicking on the **Save & Exit** button at the bottom of the form element.

Including a location plan

You have to fill in the location plan as part of your application, because it shows clearly the property that is covered by the project.

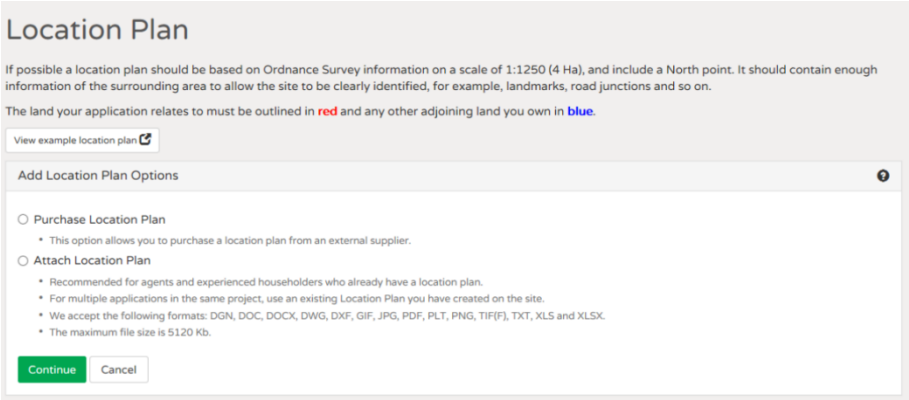
Note: This is not mandatory for Building Control forms. If you do with to submit a location form, select Not Applicable.

iApply offers you the choice of:

- Buying and marking up the plan online.
- Attaching an existing plan and sending it either online upload or by post.

To include a location plan:

1. Click on **Location Plan** in the Project summary page to display the Add Location Plan Options page.

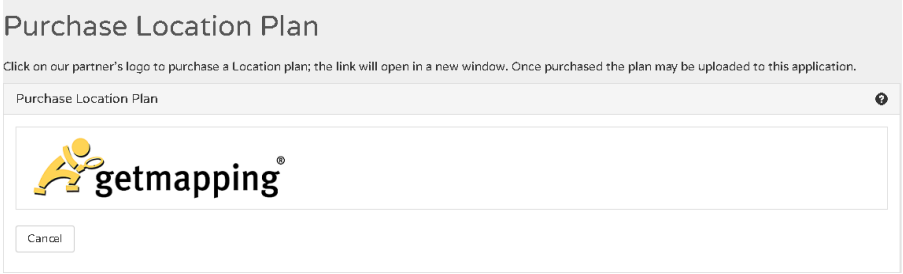


2. Select whether to **purchase** the plan online or **attach** an existing one, and then follow the instructions in the relevant following section.

Buying a location plan

If you are not used to making planning applications, we recommend that you buy a location plan from Getmapping, mark it up with the relevant information, and attach it to your application. To do this:

1. Select **Purchase Location Plan**, then click on **Continue**.



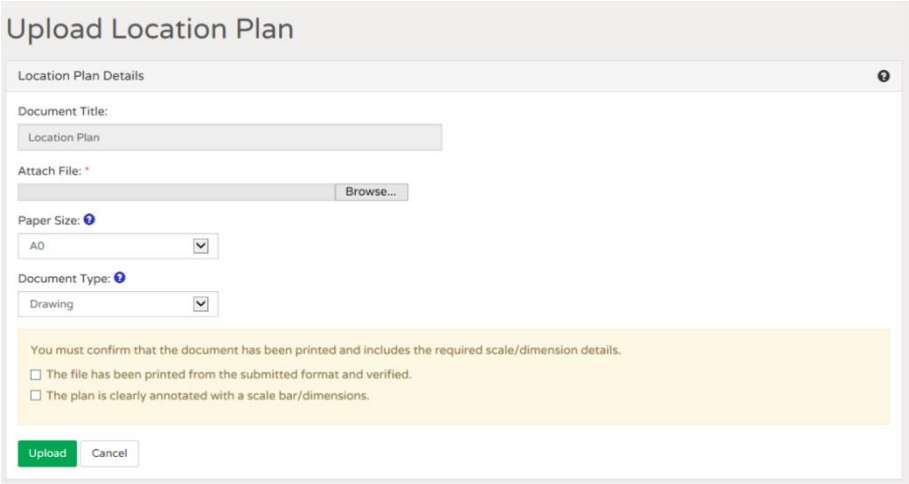
2. Click the Getmapping logo to go to the Getmapping website.
3. On entering your email address and the site's postcode, you are provided with an area of map that you can then mark up using the tools on the site. For more information, see the help available on the Getmapping website.
4. Once you have purchased the map, you can then save it and attach it to your application - click **Cancel** on this page, and then attach your purchased location plan as described in Attaching a location plan, below.

Attaching a location plan

If you already own the location plan, you can choose to send this in. To do this, on the Add Location Plan Options page.

1. Select **Attach Location Plan**, then click on **Continue**.

2. Select whether you want an electronic copy of the location plan to be **Uploaded**, or whether it will be **Posted** in a hardcopy, and then click on **Continue**.



3. If you chose to upload the plan, click the **Browse** button, locate and select the plan, and then click **Open**.
4. Select the **Paper Size** of the plan and the **Document Type** explaining what kind of document it is. It is important that these details are correct.
5. If you chose to upload the plan, select the checkboxes to show that you have printed the file and checked it contains the correct scale and dimension details.
6. Click on:
   - The **Upload** button if you attached the plan.
   - The **Save** button if you are posting the plan.
7. If you uploaded the plan, click **Continue** on the message displayed.

Once uploaded, you can view or remove a location plan by clicking on **Location Plan** in the Application summary page and then clicking the **Remove Location Plan** button if you want to remove it.

Including supporting documentation

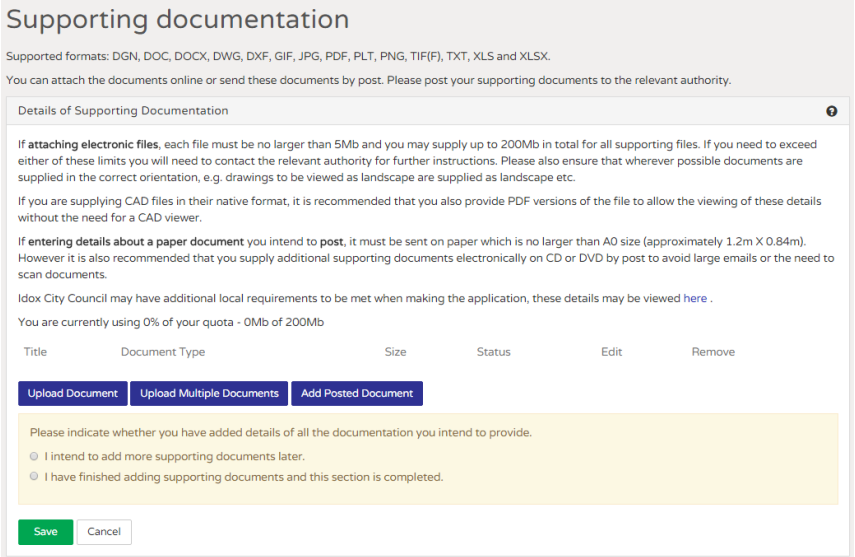
You may want to upload or post other documents to support your application (for example, site photographs or architects' reports). Even if you do not intend to do this, you need to fill in the Supporting documentation page to confirm this. iApply offers you the choice of:

- Attaching a document.
- Attaching multiple documents.
- Sending a document by post.

To record whether you are including supporting documentation, and optionally attach it:

1. Click on **Supporting Documentation** in the Application summary page.
2. Do one of the following:
   - If you are not including supporting documentation, select **No** and click **Continue** to return to the Application summary page.

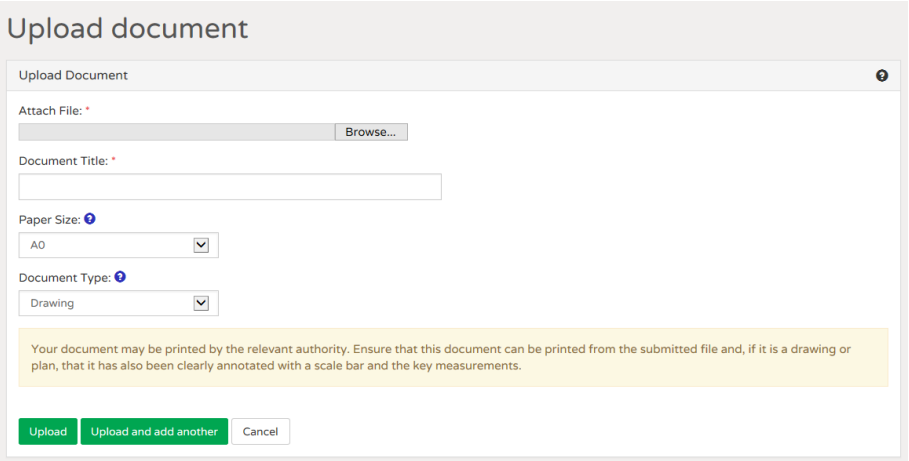
– If you are intending to include supporting documentation, select **Yes**, click **Continue**, and proceed to step 3.



3. Click on the **Upload Document** button, **Upload Multiple Documents** button or **Add Posted Document** button depending on whether you will be attaching an online version of the document, or sending a hard copy by post.

Uploading a document

1. If you chose to upload a document, click the **Browse** button, locate and select the document, and then click **Open**.



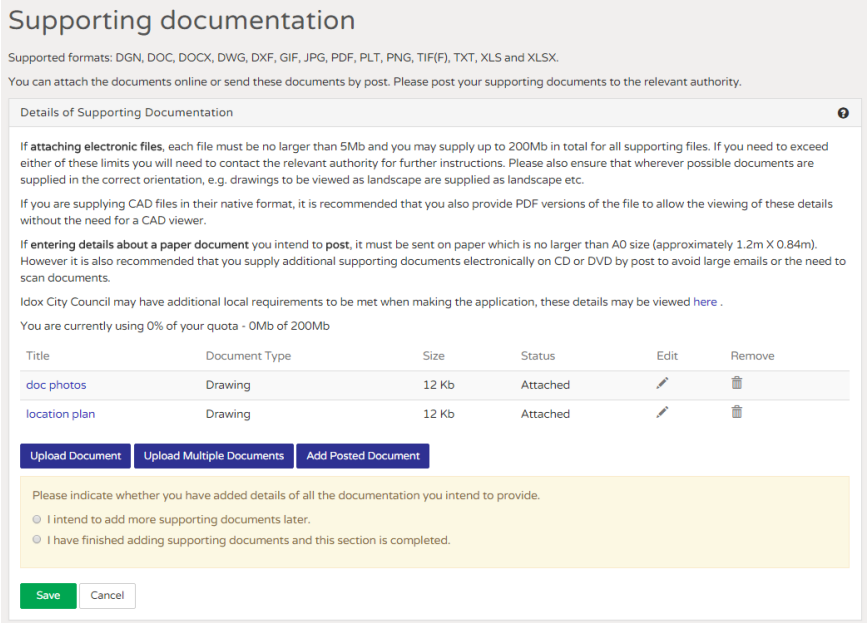
2. Enter a **Document Title**, select the **Paper Size** of the document, and select the **Document Type** explaining what kind of document it is. It is important that these details are correct.
3. Click on:

   – The **Upload** button if you attached the document, or the **Upload and add another** button if you want to add further documents.

   – The **Save** button if you are posting the document.

   If you clicked **Upload and add another**, a confirmation message is displayed and you can upload further documents as described in steps 4 to 6.

If you clicked **Upload** or **Save**, the details are updated on the Supporting documentation page.

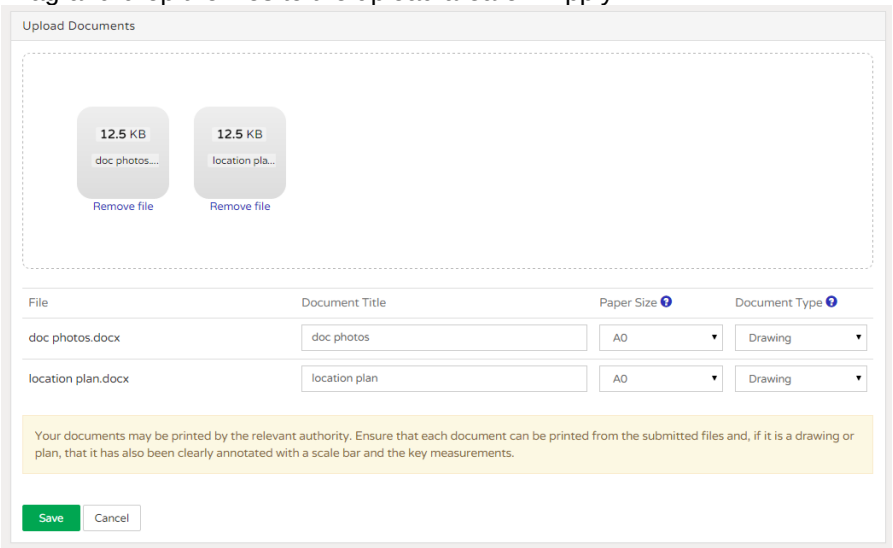


4. If required, you can edit or remove a document by clicking the Edit icon  or Remove icon  .
5. Select either **I intend to add more supporting documents later** or **I have finished adding supporting documents and this section is completed**, and then click the **Save** button.

Uploading multiple documents

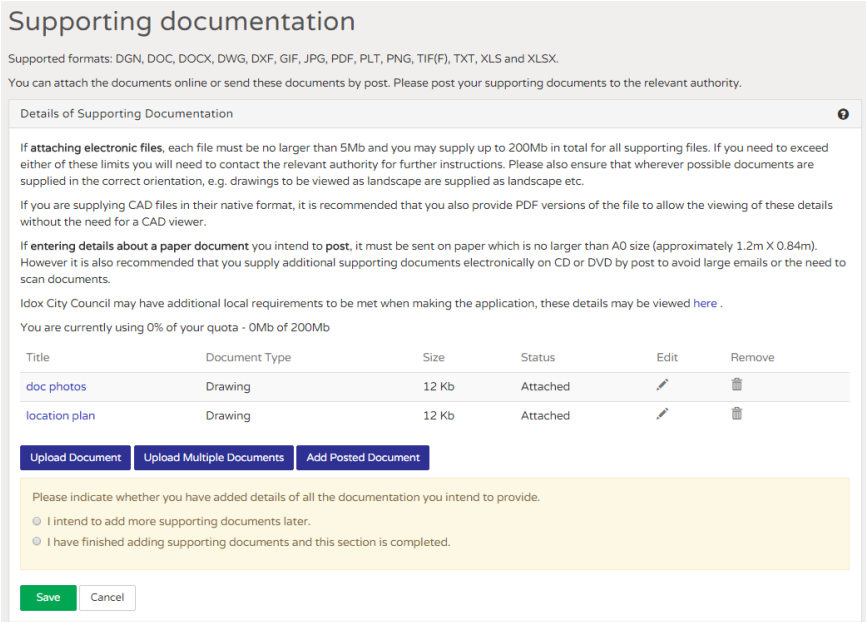
1. If you chose to upload multiple documents, select the document files from your local machine.

2. Drag-and-drop the files to the upload area on iApply.



Alternatively, you can add multiple documents by clicking on the upload area.
Navigate your local machine and select the files you wish to upload. Press Open.

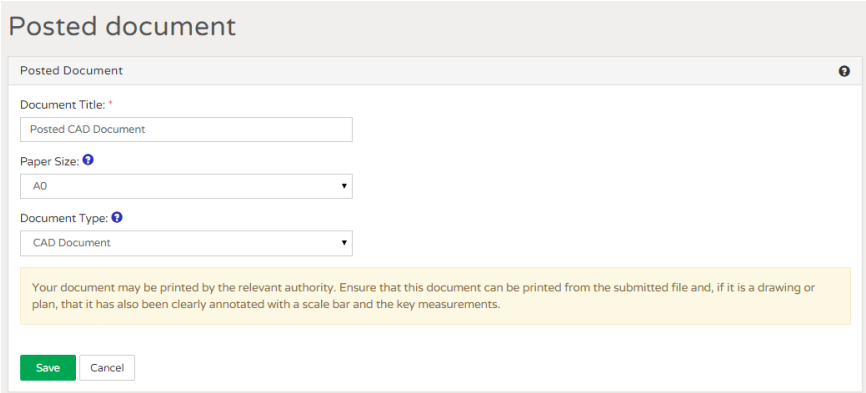
3. Enter a **Document Title**, select the **Paper Size**, and select the **Document Type** explaining what kind each document is. It is important that these details are correct.
   Files can be deleted by pressing the **Remove file** link underneath the unwanted file.
4. Press Save.



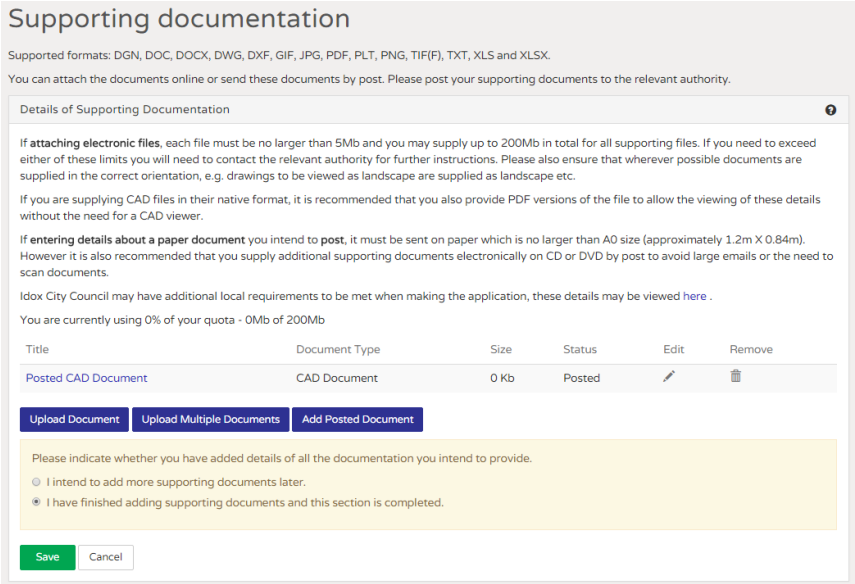
5. If required, you can edit or remove a document by clicking the Edit icon  or Remove icon  .
6. Select either **I intend to add more supporting documents later** or **I have finished adding supporting documents and this section is completed**, and then click the **Save** button.

Adding posted documents

1. If you chose to add information about a posted document, enter the title of the posted document, select the **Paper Size**, and select the **Document Type** explaining what kind each document is. It is important that these details are correct.



2. Press Save.

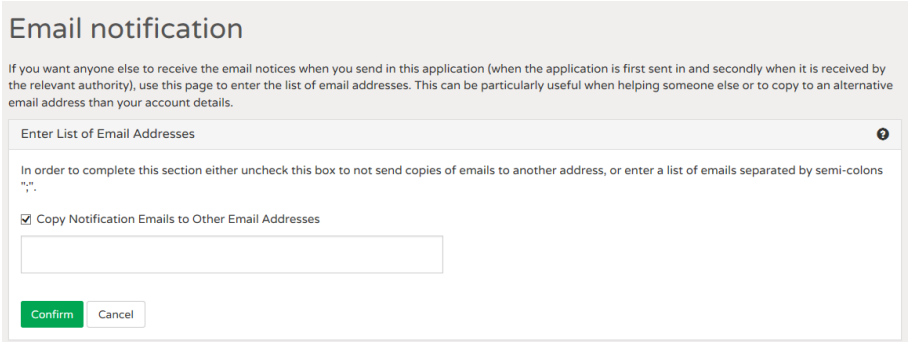


3. If required, you can edit or remove a document by clicking the Edit icon or Remove icon .
4. Select either **I intend to add more supporting documents later** or **I have finished adding supporting documents and this section is completed**, and then click the **Save** button.

Specifying who to send email notifications to

If you want to let people know when you send in this application, you can enter a list of email addresses in the Email Notification page.

1. Click on **Email Notification** on the Application summary page.

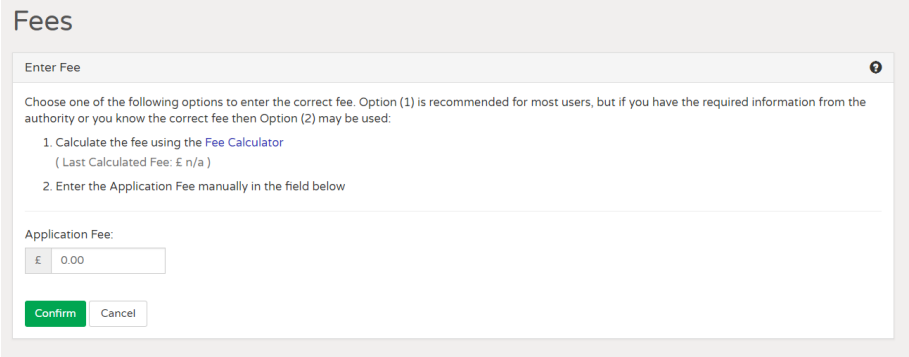


2. If you want email notifications to go to anyone other than yourself:
   a. Enter a list of email addresses in the box provided. Separate each address with a semicolon(;).
   b. Ensure that the checkbox remains selected, then click on the **Confirm** button.
3. If you do not want to send any email notices, remove the tick from the **Copy Notification Emails to Other Email Addresses** checkbox and click on the **Confirm** button.

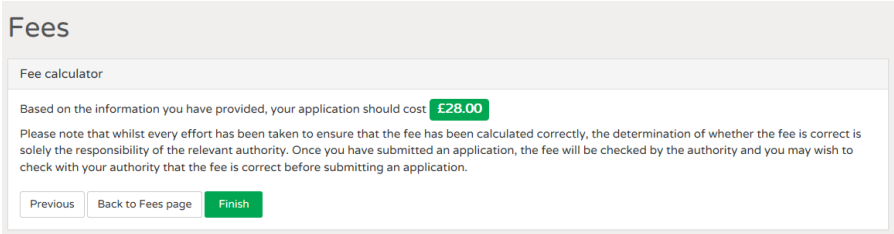
Recording the fee

The Fees section lists the chargeable parts that apply to your application, and helps you to work out the total due. You can use the fee calculator to work out what you need to pay.

1. Click on **Fee** in the Application summary.



2. To work out the fee that you need to pay, click on **Fee Calculator**. Or, if you already know what the fees are, you can type them into the **Application Fee** box.
3. If using the fee calculator, follow the wizard through, answering all of the questions to arrive at the charges that apply. Click on **Finish** and you will find that the fee amount is in the Application Fee box.



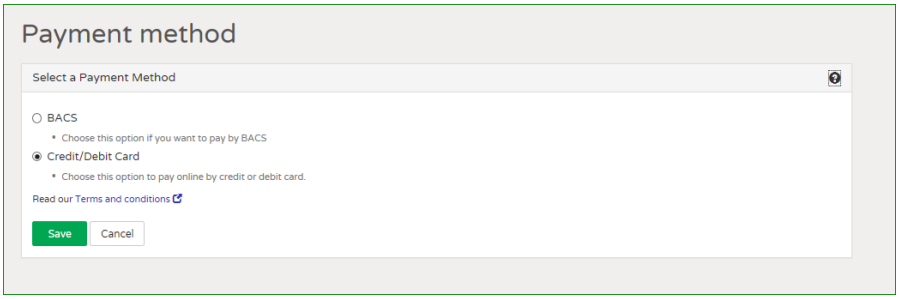
4. Click on the **Confirm** button.

Selecting the payment method

Note: The Payment Method option is only displayed once the fee has been recorded.

To record the method of payment for the application:

1. In the Application summary page click on **Payment Method**.

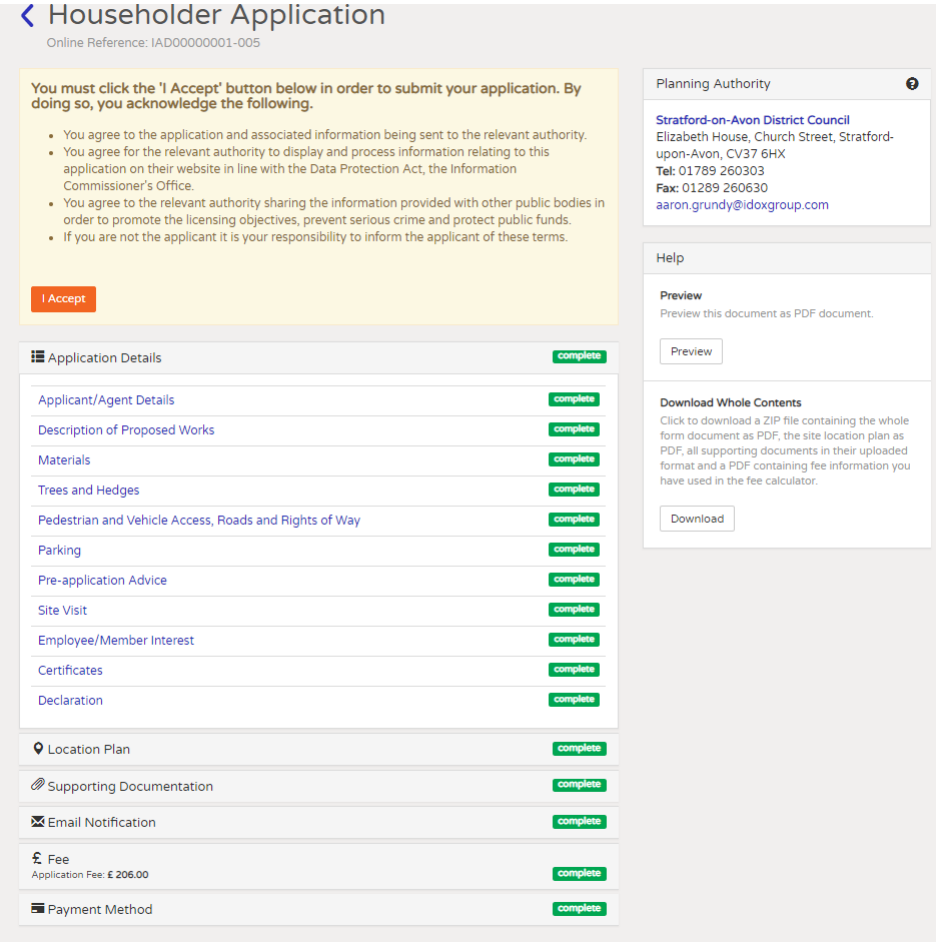


2. Depending on what your authority has configured, you can pay using one of the following options:
   - Cheque
   - BACS
   - Telephone
   - Credit/Debit card

   Your application will not be processed until payment is received.
3. Click **Save**.

Sending in the application

Once you have filled in all the parts of the application, you have a new option to continue to the next page and send in the application.



To do this:

1. Review the terms and conditions, if you accept these and are happy that the application is correct, press **I Accept** then **Submit**.
2. Enter appropriate payment details in the **Submission payment** page.

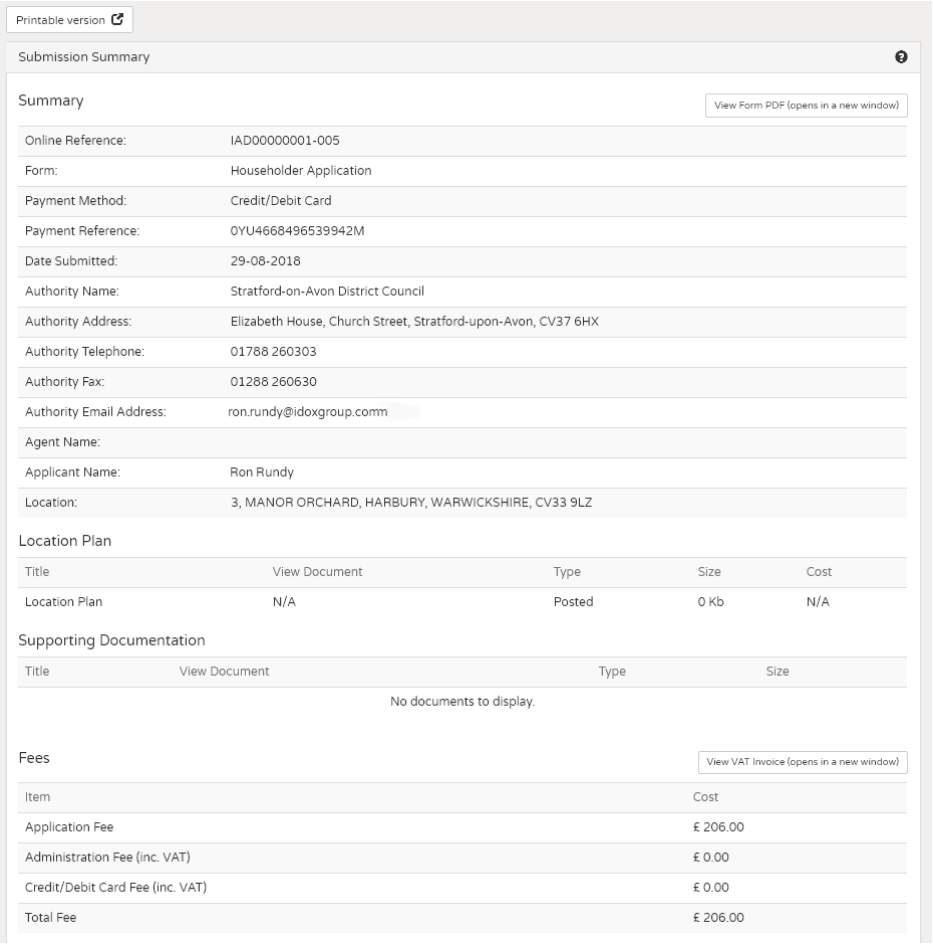
   Note: Click the Help with Submission payment icon to check which cards are accepted.

3. Once you have filled in the relevant sections, press **Proceed**.
   - If you chose to send email notices to other users, they will be sent an email now.
   - The completed Submission summary page displays all the relevant information about your application. You can view the application in PDF format by clicking on **View Form PDF (opens in a new window)**.
   - Your application will be kept on the system for a period defined by the authority (this period is specified in the Submitted Applications section).
4. To keep a copy of your application for your records, click on the **Download a copy of my submission** button and save the file to your PC. Or, you can get a printed copy of the summary by clicking on **Printable Version** and pressing **Print**.

Viewing a submission

To view details of a submitted application, simply click on it in the Submitted Applications section of the Project summary page. This opens a page showing summary details, from where you can:

- Download a zip of the submitted files, by clicking the **Download submission archive** button.
- View the application form as a PDF, by clicking the **View Form PDF** button.
- View the invoice for the fee VAT in a new window, by clicking the **View VAT Invoice** button.
- Open any attached location plans or supporting documentation by clicking the relevant **View** button.



Printable version

Submission Summary

Summary

View Form PDF (opens in a new window)

Online Reference:	IAD00000001-005
Form:	Householder Application
Payment Method:	Credit/Debit Card
Payment Reference:	0YU4668496539942M
Date Submitted:	29-08-2018
Authority Name:	Stratford-on-Avon District Council
Authority Address:	Elizabeth House, Church Street, Stratford-upon-Avon, CV37 6HX
Authority Telephone:	01788 260303
Authority Fax:	01288 260630
Authority Email Address:	ron.rundy@idoxgroup.comm
Agent Name:	
Applicant Name:	Ron Rundy
Location:	3, MANOR ORCHARD, HARBURY, WARWICKSHIRE, CV33 9LZ

Location Plan

Title	View Document	Type	Size	Cost
Location Plan	N/A	Posted	0 Kb	N/A

Supporting Documentation

Title	View Document	Type	Size
No documents to display.			

Fees

View VAT Invoice (opens in a new window)

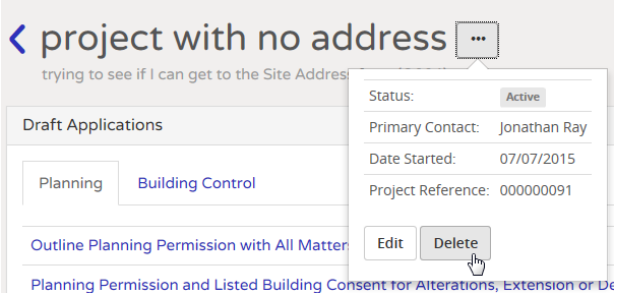
Item	Cost
Application Fee	£ 206.00
Administration Fee (inc. VAT)	£ 0.00
Credit/Debit Card Fee (inc. VAT)	£ 0.00
Total Fee	£ 206.00

Deleting projects

If you no longer need a project, you may decide to move it from the Active list in the My projects page to the Deleted tab. This removes the project but allows you to refer to it for a set number of days after it was deleted – this period is defined by the authority, and is specified in the Submitted Applications section.

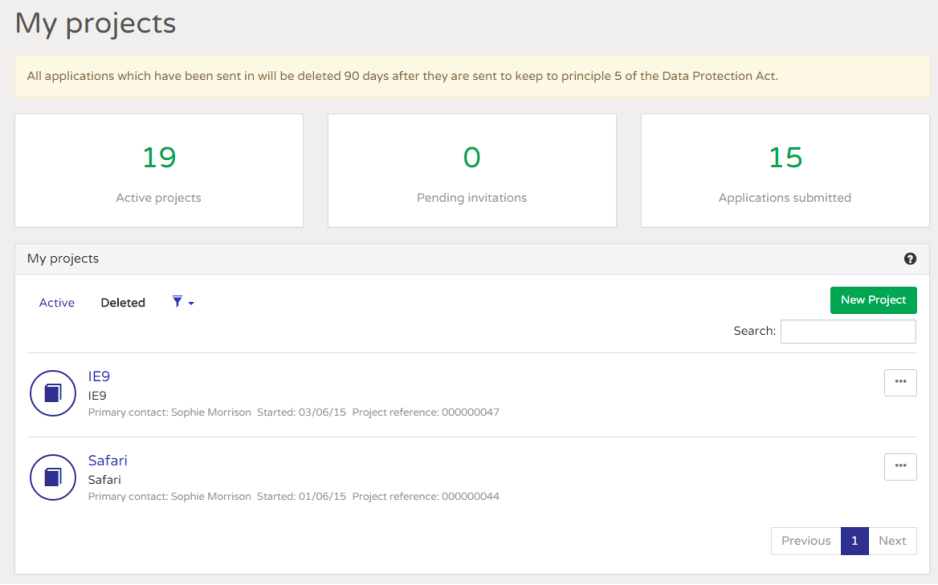
1. To delete a project:

   a. On the Project summary page, click the More button ••• and then click **Delete**.



   b. A page is displayed asking for confirmation. Click the **Delete Project** button to delete the project.

2. To view deleted projects, click on the **Deleted** tab on the My projects page.



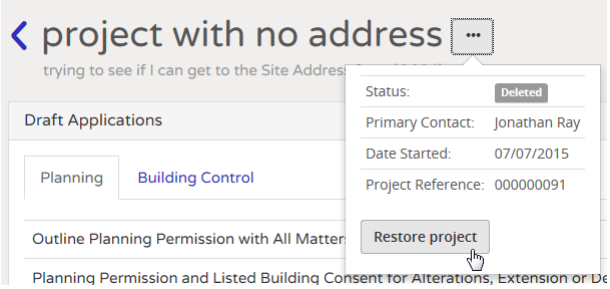
3. To filter and/or sort the projects listed, click the Filter button and select the relevant option, or search for a project as described in My projects on page 12.

Restoring a deleted project

Once a project has been deleted, you can return it to the Active list again. To do this:

1. Click on the project to display the Project summary page.

2. Click the More button ••• and then click **Restore Project**.



You are returned to the My projects page, and the project is displayed on the Active tab.

Chapter 3

Sharing and organisations

It is often helpful to involve other people in your projects to receive their opinions and help. The advice of architects and planning professionals can be invaluable, while neighbours may appreciate being able to view your plans while the planning process is ongoing.

You can invite other people to become iApply users and allow them either to view or edit your projects, and other users can offer you the same invitation.

Organisation administrators can create groups of users from their organisation who can automatically view projects created by other members.

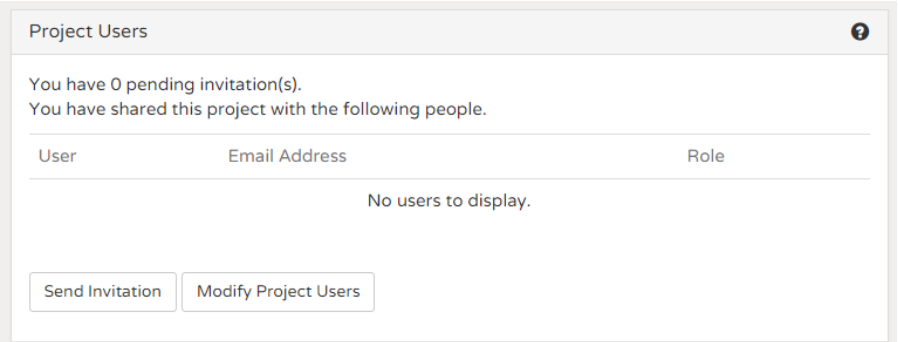
Receiving a sharing invitation

When someone sends you an invitation to view an application, we will send you an email telling you about this.

1. Log in to iApply.
2. You will be asked if you want to accept or refuse the invitation. Click on **Accept**.
3. On the confirmation page displayed, click **Accept Invitation**.

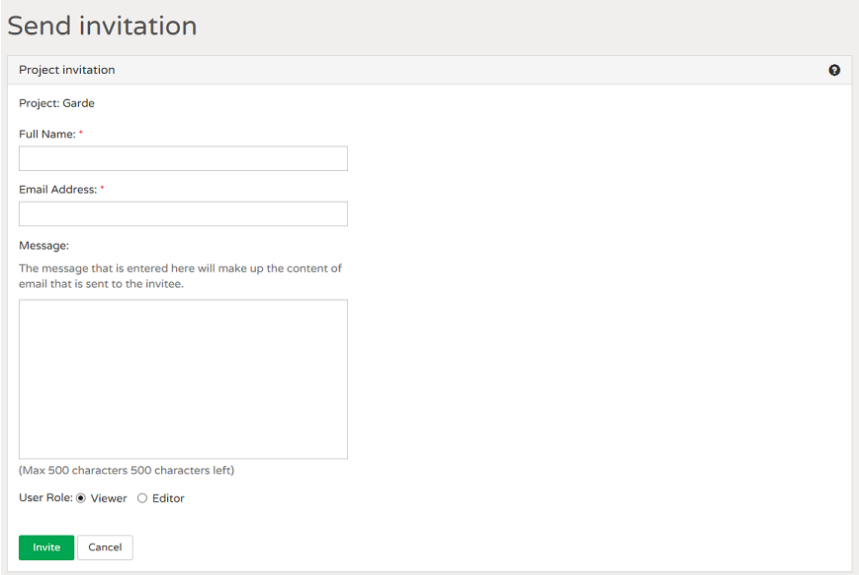
Sending a sharing invitation

Once you have created a project, you can invite others to view it by going to the Project Users section on the Project summary page. You may invite as many users as you like.



To send an invitation:

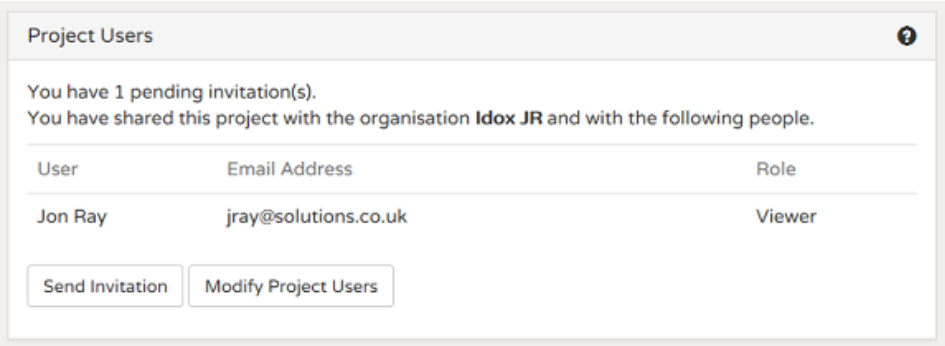
1. On the Project summary page click on **Send Invitation**.



2. Enter the name of the person you want to invite and then enter their email address.
3. Type a short note in the **Message** box to explain the purpose of the invitation.
4. Select the role that you want this user to have by choosing a **User Role** of **Viewer** or **Editor**.
5. Click on the **Invite** button.

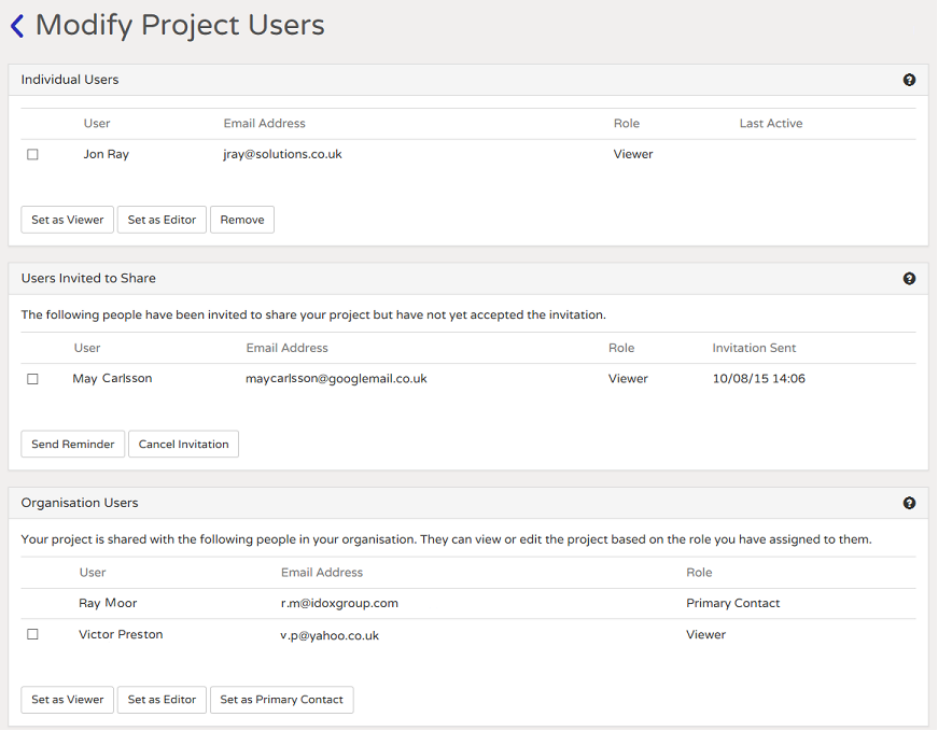
Modifying the project users

Once you have invited people to view your application, details of users who have accepted your invitation are listed in the Project Users section on the Project summary page, along with an indication of the number of outstanding invitations.



By clicking the **Modify Project Users** button, you can view details of all current users and pending invitations.

Each individual's details are shown in the **Users invited to share** section until they either accept or refuse the invitation. You can modify the viewing rights for users who accept the invitation, and allow some of them to edit your project if you want to.



To modify the project users:

1. Click on **Modify Project Users** on the Project summary page.
2. To change a user's rights from viewing to editing, select the checkbox next to their name and press **Set as Editor**.
3. To change a user's rights from editing to viewing, select the checkbox next to their name and press **Set as Viewer**.
4. To delete a user's ability to view your project, select the checkbox next to their name and press **Remove**.
5. The **Users invited to share** section gives you a list of the users you have sent an invitation to but who have not yet accepted or refused.
   - You can send a user a reminder email by selecting the checkbox next to their name in this section and clicking on the **Send Reminder** button.
   - To withdraw the invitation, select the user and click on the **Cancel Invitation** button.

In addition, if you are a member of an organisation, your projects will be accessible by all of your organisation's members, and you can modify their access to the project.

Note: For information about organisations, see Organisations on page 40.

Organisation users will have one of the following roles.

- **Primary Contact:** The main user involved in the project. Only the Primary Contact can amend the user roles for this project. If you created the project, this will be you unless you make another user the primary contact.
- **Editor:** A user who can work on the project, editing the project details and filling in the attached forms.

- **Viewer:** A user who is not directly involved in completing the project but is allowed to view the project for information purposes only.

To change the role of an organisation user:

1. To make another member of your organisation the primary contact, select them and click on the **Set as Primary Contact** button.

   Note: When you transfer primary contact status to another user, you will automatically lose the ability to change the user status of that project unless you become the administrator of the organisation once more.
2. To allow a member of your organisation to edit the details of the project, select them and click on **Set as Editor**.
3. To restrict a member of your organisation to only viewing this project, select them and click on **Set as Viewer**.

Organisations

An Idox Administrator will create organisations and set up the administrator for that organisation. The Organisation Administrator will then be able to send invites to other users to join their organisation.

Organisations are used to allow members to collaborate on the projects created by their colleagues. Generally these correspond to a business organisation or group of individuals who often work together.

Note: A user can only belong to one organisation.

Joining an organisation

If you are invited to join an organisation, you will be sent an email. You can accept or refuse the invitation. To do this:

1. Log in to iApply.
2. You will be asked if you want to accept or refuse the invitation. Click on **Accept**.
3. On the confirmation page displayed, click **Accept Invitation**.

Once you have accepted the invitation, the organisation's details will be shown in your Sharing page and all of the projects that belong to the members of the organisation will be available on your My projects page.

Notes:

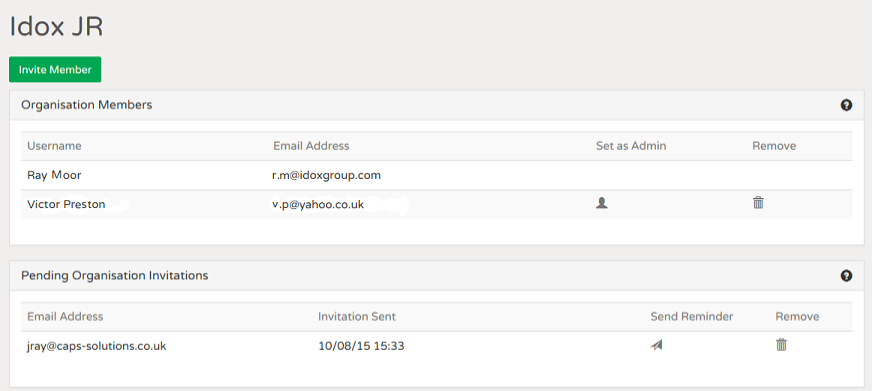
- You cannot remove yourself from an organisation. Only the organisation's administrator can do that.
- If the organisation is deleted, all users that belong to it (except the administrator) will lose access to the projects.

Managing an organisation

If you are the organisation administrator, you can invite further users, remove existing users, or transfer the administrator role to another user.

To manage an organisation:

1. Click on **Sharing** in the banner at the top of any page and then click **View Organisation Details** on the Sharing page.



2. To invite another member to the organisation, click on **Invite Member** and enter the name, email address and invitation message. Then press **Invite**.
3. To remove a user from the organisation, click on the Remove icon next to their name.
4. To transfer administrator rights to another organisation member, click on the Set as Admin icon next to their name.
5. The **Pending Organisation Invitations** section shows you the list of users you have sent an organisation invitation to but who have not yet accepted or refused.
   - You can send a user a reminder email by clicking on the Send Reminder icon .
   - To withdraw the invitation, click on the Remove icon .