DPEA Portal User Guide

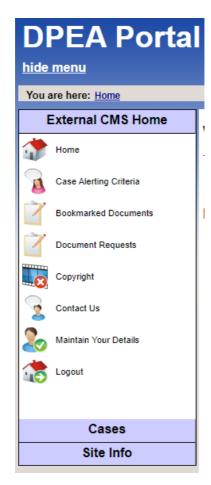


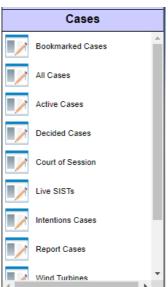
Contents

- Portal home
- Quick search
- Active cases
- Searching for cases or documents within lists
- Searching with multiple criteria
- Case alerts
- Adding case alerts
- Editing, pausing and deleting alerts
- Bookmarking cases or documents
- Removing case or document bookmarks

Portal Home

• When you first log in to the site, you will be taken to your homepage. This will show you an overview of active and bookmarked (Favourite) cases. The left-hand menu gives you access to the following: (You can hide/view this left-hand menu at any point by clicking on hide menu/view menu)





Home – This takes you back to your homepage

Case Alerting Criteria – In this section you can set alerts for specific councils and characteristics, so you are notified when these appeals have arrived in the DPEA

Bookmarked Documents – Any documents from any case you have bookmarked to look at further

Document Request - Any requests sent to you from the DPEA regarding any cases you are involved in

Contact Us – DPEA contact details for any assistance regarding the Portal

Maintain Your Details - Update your details and password

Logout - To log yourself out of the portal

Below this there is the Cases menu, this includes a variety of workflows which narrow down all the cases on the system, by case type etc. these help make searching for specific cases easier

Quick Search

- The Quick Search function is located at the top right hand corner of the screen.
- Quick Search is the easiest method of finding a case if you have the case reference or the name of the Main Contact.



• Select the box, enter the case reference or main contact surname and either select Quick Search or press return on your keyboard.



• The Quick Search Results will appear with the case listed below, you can then select View to access the case.



Active Cases



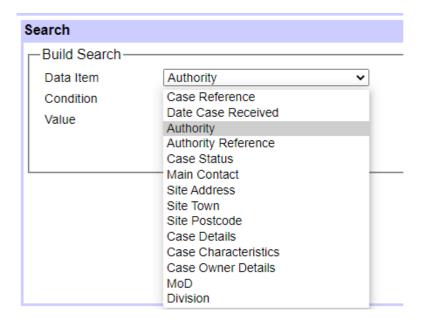
- The Active Cases workflow/list shows only cases that are still active, which
 is any case with the following status:
 - Appeal awaiting registration.
 - Not yet ready for allocation to reporter.
 - Ready for allocation to reporter.
 - Case on hold.
 - Case on hold expired.
 - Allocated to reporter.
 - Notice of Intention Issued.
 - Report Issued.
 - Decision appealed to Court of Session.

Searching For Cases Or Documents Within Lists

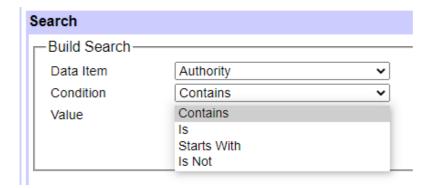
- You can use the Search function at the top and bottom of the active cases workflow to search by Case Reference, Date Case Received, Authority, Authority Reference, Case Status, Main Contact, Site Address, Site Town, Site Postcode, Case Details, Case Characteristics. Case Owner. MoD or Division
- You can search the Documents List within a case, once you have accessed it, for
 particular documents in exactly the same way using the Search function at the top
 or bottom of the list.
- When searching workflows, the Search button is located at the top and bottom of the workflow. select it and the Search Tool will open above the top of the list (You can jump to the bottom of a page by pressing the End key on your keyboard, and pressing the Home key returns you to the top of the page).

Active (Cases											
First 1	2345	<u>678910</u>	Last	Go To Pag	e:			G0			<u>Search</u> <u>Excel</u>	Word
Case Reference Z A +	Date Case Received	Authority	Authority Reference		Main Contact	Site Address	Site Town	Site Postcode	Case Details	Case Characteristics	Case Owner Details	MoD Z
LBA-260- 2066	25 Aug 2021	Glasgow City Council	20/02248/LBA	Awaiting registration		17 Kingsborough Gardens, Glasgow, G12- 9NH	Glasgow	G12-9NH	Partial Demolition Or Alterations Of Catagory B Listed Building	Building Alterations (householder), Demolition	Dianne Mitchell - Tel: 0131 244 8263 - Email: Dianne.Mitchell@scot.gov.uk	
ENA-100- 2010	25 Aug 2021	Aberdeen City Council	ENF200181	Awaiting registration		Meikle Clinerty, Kirkton Of Skene, Kinellar, Aberdeen, AB21 OTZ	Kinellar, Aberdeen	AB21 OTZ	Appeal Against Apparent Breach Of Planning Control(Section 127) Of Town And Country Planning (Scotland) Act 1997	Fencing/Wall, Landscaping	Dianne Mitchell - Tel: 0131 244 8263 - Email: Dianne.Mitchell@scot.gov.uk	
LBA-230- 2222	24 Aug 2021	City of Edinburgh Council	21/03419/LBC	Awaiting registration		3F2 9 Warrender Park Terrace , Edinburgh , EH9 1JA	Edinburgh	EH9 1JA	Restore The Windows To The Correct Wooden White Sash Type With A 40 / Split To Install Double Glazed Windows To Save Energy	(householder),	Christopher Kennedy - Tel: 0131 244 6901 - Email: Christopher Kennedy@scot.gov.uk	
ADA-100- 2028	23 Aug 2021	Aberdeen City Council	210800/ADV		Clear Channel UK	Near Soutar Head Road Roundabout, Wellington Road, Aberdeen	Aberdeen		Installation Of 1 Illuminated Free Standing Digital Display Unit	Advertisement	Mandy McComiskie - Tel: 0131 244 6982 - Email: mandy.mccomiskie@scot.gov.uk	Site Inspection
LBA-300- 2006	23 Aug 2021	Moray Council	21/00511/LBC	Awaiting registration		Flat 5 91A High Street, Elgin, Moray, IV30 1EA	Moray	IV30 1EA	Proposed Roof Terrace And Associated Works	Building Alterations (householder)	Mandy McComiskie - Tel: 0131 244 6982 - Email: mandy.mccomiskie@scot.gov.uk	
PPA-260- 2138	22 Aug 2021	Glasgow City Council	21/00327/FUL	Awaiting registration		968-970 Argyle Street, , Cranston Hill, G3 8LU		G3 8LU	Suggested Proposed Merger Of 970 Argyle Street With 968 Argyle Street To Form One Class 3 Cafe Premises With An Ancillary Take Away Service	Retail (food)	Christopher Kennedy - Tel: 0131 244 6901 - Email: Christopher Kennedy@scot.gov.uk	

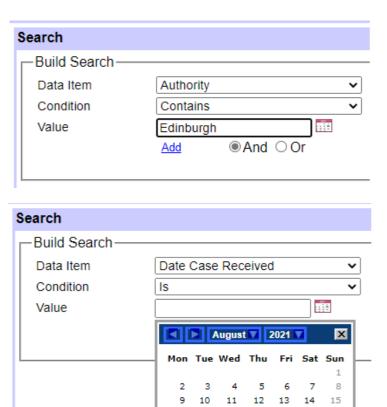
- To build a search, select the type of Data Item you wish to look for from the drop down menu.
- The items listed as Data Items are the column headings from the workflow.
- You can only search items that are listed in the columns.



- Select the Condition for the search.
- If searching for a text result it is recommend to select Contains if the search is quite general to allow for slight variations that could prevent the appropriate results appearing.



• Type the phrase, number or date into the Value field. (To select a date here, select the calendar icon)



17

23 24

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19 20 21

Today is Thu, 26 Aug 2021

25

26 27

 Select <u>Add</u>. This will add the search to the Search Criteria Box on the right. If this is the only criteria needed then select <u>Apply Search</u>

28 29



• The results matching the search criteria will be displayed below the Search Tool, with the option to <u>View</u> each case in detail.



• It is important to clear searches by clicking Clear Saved Search before, for example, moving on to view documents on another case, as the search will be applied to that case's documents as well, but it may not be obvious to you that this has occurred.

Searching With Multiple Criteria

 If the search requires multiple search criteria, enter the first search criteria as normal. select <u>Add</u>. Enter the second search criteria. Select either And or Or, depending on how specific you want the search to be, then select <u>Add</u>. The second criteria will be added to the Search Criteria box. Repeat Step 1 if more Criteria are required.



 Once all search criteria has been entered, select Apply Search. The results will appear below.



- Selecting Clear Last removes the last of the search criteria and allows use of Apply Search to expand the search results. Or a different secondary criteria can be added before Apply Search is used to get different search results
- Selecting Clear All removes all search criteria but keeps the results of the search. It does not allow further searching on those results i.e. adding new criteria is treated as a completely new search.
- Select Clear Saved Search to completely clear the search process and start from the beginning.

Case Alerts

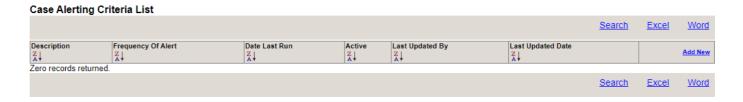
- Case Alerts can be set up to send you emails when new cases are added and when changes are made to existing cases.
- You will be alerted at 2 am each day to any relevant changes made on the system the previous day.
- A new alert set up, for example, at any time on Tuesday will only begin alerting you to any relevant changes made from Wednesday onwards

Adding Case Alerts

Select Case Alerting Criteria



Select Add New



• STEP 1 - Enter a Description - this is the name of your alert and will appear in the email update and ensure the active box is ticked



You will then choose what to be alerted about in Step 2

• STEP 2: Specify Cases

Step	2: S	pecif	y Cases
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To set up case alerts here you must select at least one Authority, Case Type or Characteristic. If a combination from within these three is chosen then all of the criteria must be met by a case to generate the required alert e.g. if Angus, Planning Permission Appeal and Wind Farm (offshore) are selected and a new Planning Permission Appeal for a Wind Turbine (single) in Angus is received, an alert would not be generated because all three criteria have not been met.

Select a set of cases to monitor by: O Authority, Characteristic and/or Case Type

Case Reference NumberMy Bookmarked Cases

- By Authority, Case Type, Characteristic allows you to get alerts on new cases, <u>and</u> on other criteria such as issue of decisions and submission of documents, for a wide variety of cases defined by the Authorities, Case Types, and/or Characteristics you select
- Case Reference Number allows you to get alerts on specific active cases by using our case reference to set up the alert for various changes to the case
- My Bookmarked Cases allows you to get alerts on some or all of your bookmarked cases, whether or not you set up the bookmark prior to or after setting up the alert

Using By Authority, Case Type and Characteristic to get filtered results
Alerts with one filter

- To be notified of all cases in a specific Authority area Tick the authority and move to Step 3
- To be notified of all cases with a specific characteristic Tick the characteristic and move to Step 3
- To be notified of all cases with a specific Case Type Tick the Case Type and move to Step 3

Alerts with two filters

- To be notified of all cases with a specific characteristic in a specific Authority area- tick the authority AND the characteristic and move to Step 3
- To be notified of all cases in a specific Authority area with a specific case type - tick the authority AND the case type and move to Step 3
- To be notified of all cases with a specific characteristic with a specific case type - tick the characteristic and the case type and move to Step 3

Alerts with three filters

 To be notified of all cases in a specific authority with a specific case type and a specific characteristic - tick the authority AND the case type AND the characteristic and move to Step 3

Using Case Reference Number

- Enter the case reference number(s) you wish to be alerted on and select Search
- The reference will be added to the list box and you can repeat the process for additional cases. If you enter a reference that doesn't exist, a message will appear below the box advising that a case with that reference cannot be found.
- You can remove a case from the list by clicking on it in the list box and then clicking Remove Selected Item.
- Once you have added the specific cases move on to Step 3

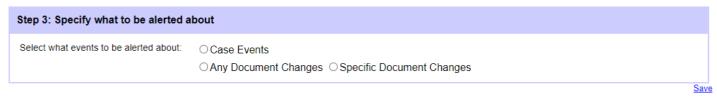


Using Bookmarked Cases

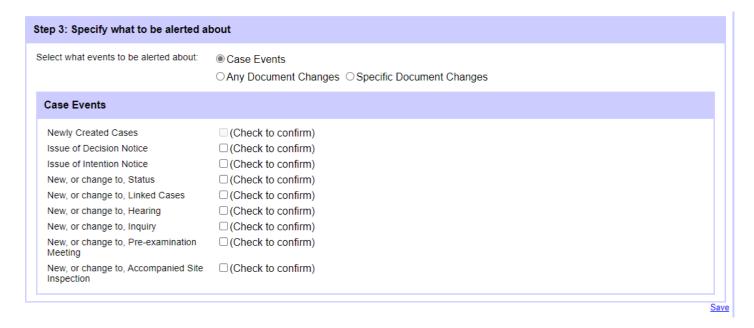
- You must firstly bookmark your cases please refer to that section
- For bookmarked cases alerts you should not select any of the above if you want the same alert for all of your bookmarked cases.
- You can use By Authority, Case Type and Characteristic to get an alert for some of your bookmarked cases e.g. if some of your bookmarked cases had the characteristic "Wind Farm (two or more turbines)", then you could use the <u>Select</u> Characteristics option to apply the alert to only these cases.
- Once you have made any required specifications to Bookmarked Cases, then you can move to Step 3

STEP 3: Specify what to be alerted about

 Step 3 allows you to select what you wish to receive an alert about. There are 3 options.



• If you select Case Events, you can choose to be notified on certain events happening to the case or cases meeting your criteria selected in Step 2.



 Tick the events you wish to be notified of and select Save to create the alert.

The Record has been successfully displayed will appear at the top of the alert.

• If you select Any Document Changes, you will be notified when any new documents are added to the case file.



Select Save to create the alert.

The Record has been successfully displayed will appear at the top of the alert.

- If you select Specific Document Changes, you will have 3 options to tailor your alerts
- You can choose to be notified on documents containing set word(s) by entering the word into the box

S	Specific Document Changes							
	specify Description and/or select Type and/or select Category:							
	Addition or Removal of Documents with Description containing word(s) :							
		e.g. Application, Breach						

• You can choose to be notified on selected Document Types

Select Document Type(s) - Click to Show/Hide							
Select All Document Types:							
	☐ Additional Environmental Information	□ Notice					
	□Agenda	☐ Opt-in Letter					
	☐ Appeal form	☐ Order/Statement of Reasons					
	☐ Application Form	□ Photo					
	☐ Authority Decision	□ Plans					
	☐ Authority Response Form	☐ Precognition					
	☐ Claim for Expenses	☐ Procedure Notice					
	☐ Closing Submissions	☐ Recall direction					
	☐ Conditions	☐ Relevant Notice					
	☐ Consultation Response	□Report					

• You can choose to be notified on selected Document Categories

Select Document Categor(ies) - Click to Show/Hide						
Select <u>All</u> Document Categories:						
	☐ Appeal Documentation	☐ Hearing				
	☐ Appellant's Comments on Authority Response	□ Inquiry				
	☐ Application Documentation	□Issues				
	☐ Authority Response	☐ Order Documents				
	☐ Call-In/Recall	☐ Pre-examination meeting				
	☐ Comments on Authority Response	☐ Representations to DPEA				
	☐ Comments on responses (HH)	☐ Responses to Appeal (HH)				
	☐ Correspondence issued	☐ Schedule 4 Forms				
	☐ Decision/Outcome	☐ Screening				
	☐ Examination Documents	☐ Section 75 Agreement				
	□Expenses	☐ Site Inspection				
	☐ Further Environmental Information	☐ Summary of Unresolved Issues				
	☐ Further Information	□ Withdrawals				
	☐ Further Written Submissions					

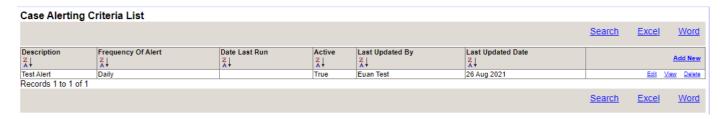
Using Specific Words, Document Categories and Document Types to receive filtered document alerts

- Using a combination of the three allows you to further filter document alerts
- Entering a specific word and selecting a document category will result in alerts only when a document is added to the category that contains the specific word
- Entering a specific word and selecting a document type will result in alerts only when a document is added with the specified document type that contains the specific word.
- Selecting a document category and document type will result in alerts for documents added only with the specified document type AND document category assigned
- Entering a specific word, selecting a specific document type and selecting a specific document category will result in an alert only when a document containing the specific word AND with the specified document type AND document category assigned.
- Select Save to create the alert.

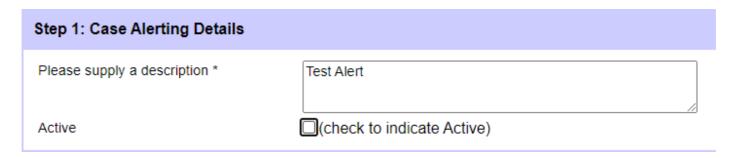
The Record has been successfully displayed will appear at the top of the alert.

Editing, Pausing and Deleting Alerts

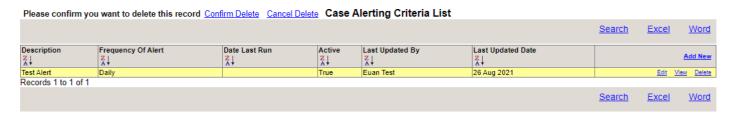
You can make changes to any of your alerts by clicking on <u>Edit</u>



Pause and reinstate by ticking or unticking the Active checkbox and clicking Save



• To permanently delete an alert select <u>Delete</u>. The line for the alert you are deleting will turn yellow and a message requiring confirmation will appear as shown



• Select <u>Confirm Delete</u> and "Record Deleted" will then appear in place of the confirm message.

Bookmarking Cases or Documents

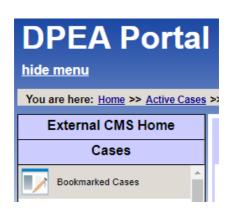
To bookmark a case for easy access, select <u>View</u> to open the case details.

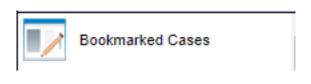


 The case will open and the details will be visible. To bookmark the case, select <u>AddBookmark</u>, top right.

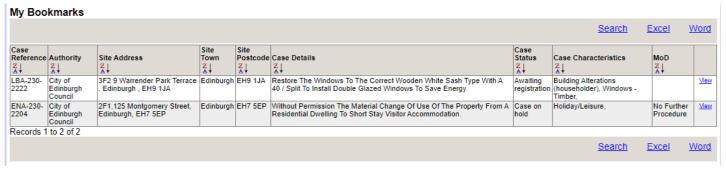


- The message 'The bookmark has been successfully created.' will appear top left.
- To guickly access cases you have bookmarked, select Bookmarked Cases





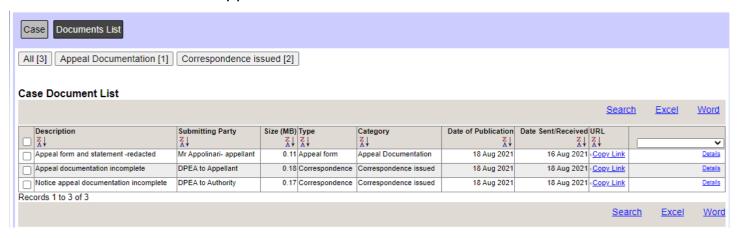
The list of your bookmarked cases will appear. Select the relevant View against the case you wish to view



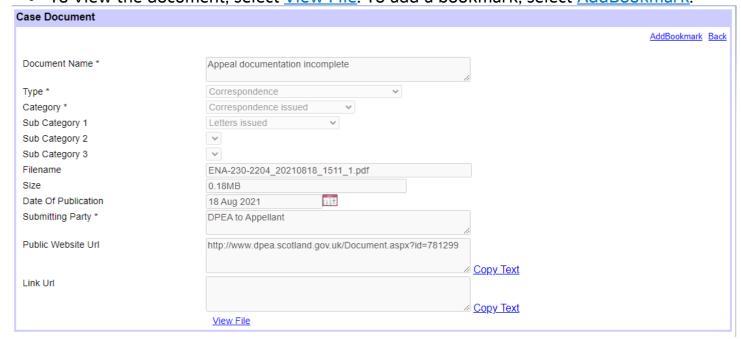
 To bookmark a document for easy access, open the relevant case and select Documents List



The Case Document List will appear.

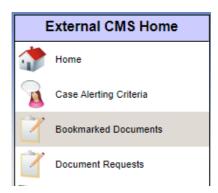


- Navigate to the required document using the search function at the top or bottom or using the Document Groups at the top.
- Select Details on the required document to access it.
- To view the document, select <u>View File</u>. To add a bookmark, select <u>AddBookmark</u>.

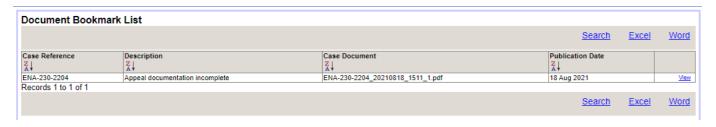


The message 'The bookmark has been successfully created.' will appear top left

• To quickly access documents you have bookmarked, select Bookmarked Documents



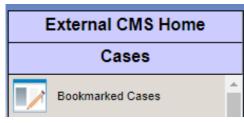
This will show you the list of your bookmarked documents. Select the relevant <u>View</u> against the document wish to you access.



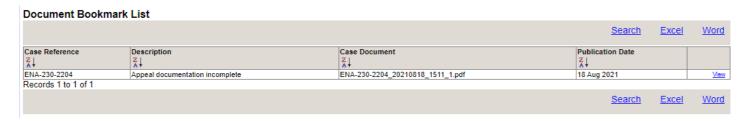
Removing Case and Document Bookmarks

• To remove a bookmark from a case or document, access your bookmarked cases/documents using the menu icons.





Select <u>View</u> on the case/document you want to remove the bookmark from.



• Select Remove Bookmark in the top right of the box. The message the bookmark has been successfully removed will appear.

The case/document will now be removed from your bookmarked case/document list.

