Using Workspaces

Allow your client to review applications before submission
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What are Workspaces?
You can use the Planning Portal’s built-in Workspaces functionality to allow your client to review the application you are creating for them, before it is submitted.

The Workspaces application allows you to create applications in collaborative areas. You can then invite others to these areas. This allows you to share the application for review.

In order to share a Workspace with your client, they will need a Planning Portal account.

Your client’s Planning Portal account
Your client can make an account by visiting the Planning Portal and clicking the Register link in the top left of the page, as shown below:

They will need to follow all the registration instructions and click the activation link contained in the email they will receive upon successfully registering.

You should ensure that your client has selected the same ‘user type’ as yourself in the “What best describes you?” field (i.e. if you are registered as a ‘Professional User’, they will also need to be registered as a ‘Professional User’).

Please see below:
Setting up a new Workspace
To set up a new Workspace, you will need to Access your ‘My Planning Portal’ page. This is the page where you
can find your Draft, Submitted, Transferred and Archived applications.

Click the ‘Manage Workspaces’ button, as shown below:

You will then be taken to the ‘My Workspaces’ page:
Once here, type a name for your workspace in the field provided, as shown below:

Once you have typed in the application name, click the yellow ‘Create Workspace’ button. This will create your
You will then immediately be presented with an ‘Edit Workspace’ screen, where you can add a description of the Workspace if you wish:

Once you have added a description, click the yellow ‘Update Workspace Details’ button to save your changes.

You can also access the above ‘Edit Workspace’ page from the ‘My Workspaces’ page, as shown below:
Creating an application for your client to review

You can use your Workspace by clicking ‘Switch to this Workspace’ on the ‘My Workspaces’ screen, as shown below:
**Important:** You should ensure that you are in the correct Workspace before you start the application.

Once you are sure you are in the correct workspace, start an application as normal:

If you wish to share an application, but you have not created it in the correct Workspace, call our service desk on 0333 323 4589.

They will be able to move the application into the correct shared Workspace for you.

**Inviting your client to view the application**

Navigate to the ‘Edit Workspace’ screen for the Workspace you have created the application in:
Workspaces User Guidance

My Workspaces
Create a new workspace by simply supplying a name.

Create Workspace

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
<th>Created</th>
<th>Members</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Applications</td>
<td>Default Workspace</td>
<td>09 Aug 2018 - 09:10</td>
<td>0</td>
<td>Switch to this workspace</td>
</tr>
<tr>
<td>Client Applications</td>
<td></td>
<td></td>
<td></td>
<td>Edit / Switch to this workspace</td>
</tr>
</tbody>
</table>

Linked Workspaces
You are not linked to any external workspaces

Edit Workspace

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client Applications</td>
<td></td>
</tr>
</tbody>
</table>

At the bottom of this page, you should find a section called ‘Workspace Members’:  

Transforming planning and building
Here you should add the email address your client used to register their Planning Portal account and click the yellow button which says ‘Add user to workspace’.

You will then be shown the below pop-up:
Confirm that you want to invite your client by clicking the yellow button which says ‘Add Workspace Member.’

Your client will then be invited to the Workspace.

You will see them listed on the ‘Edit Workspace’ screen for that Workspace, as shown below:
On this screen you can also edit the privileges assigned to your client.

If you want your client to have the ability to create applications, tick 'Allow create'. If you want your client to have the ability to submit an application, tick 'Allow Submit'.

**Viewing the application as a client**

Your client should sign into the Planning Portal with their account.

They should access their 'My Planning Portal' page and click the white 'Manage Workspaces' button on the left of the page, as shown below:
They will then see your invitation to access the Workspace in the 'Workspaces Pending Activation' section of their 'My Workspaces' page.
They should click on the blue invite box to select the invitation. They will then see this dialogue box:
They should click the yellow ‘Confirm’ button.

When your client returns to their ‘My Workspaces’ screen, they will now see the shared workspace you have created under their list of Linked Workspaces:
They can then switch to the shared Workspace by clicking ‘Switch to this workspace’, shown in the screenshot above.

From this shared Workspace, your client will be able to access the application you created for them:
Help and support

If you require assistance setting up a workspace, completing an online planning application or anything else, please email our support team at support@planningportal.co.uk, or call them on 0333 323 4589.