# LPA Admin

A guide for Local Authorities to manage their Planning Portal settings

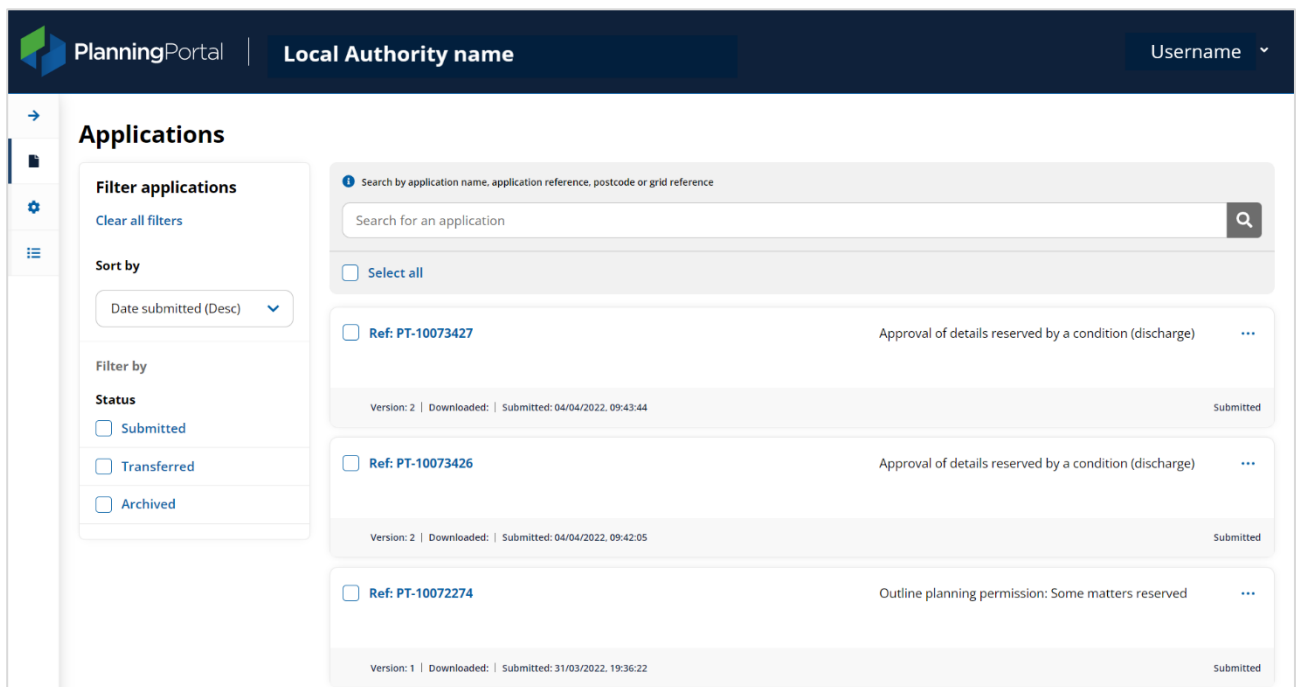## Contents

# What is LPA Admin?

LPA Admin is our web-based tool for Local Planning Authorities to manage some administrative functions of the Planning Portal, the system is restricted to Local Authority staff.

You will need to have a Planning Portal account, work for a Local Authority, and have a gov.uk email address to use LPA Admin. Our Service Desk team can enable access.

**Please note**, this facility applies to the planning application service and not our building control application service.

# Log in to your account

Visit https://lpa.planningportal.co.uk/. Your username and password will be the same as those used to access the Planning Portal online application service.

> You may find it helpful to bookmark this link: **https://lpa.planningportal.co.uk/.**
>
> You can also access via our Local Authority section via the Local Authority hub section of the website: **https://www.planningportal.co.uk/services/authorities** which also provides further useful information for Local Authorities.

If you are a Local Authority in Wales, the LPA Admin tool for Planning Applications Wales can be found here: https://lpa.planningapplications.gov.wales/ and the following guidance in this document applies.

## If you don't have a Planning Portal account

If you work for a Local Authority and don't have a Planning Portal account, you can create one by visiting https://www.planningportal.co.uk/app/ and selecting Register for an account.

Once you have done this, you will also need to request access to LPA admin as a new Local Authority user by emailing our Service Desk Team at support@planningportal.co.uk.

## Navigation – Menu options

Once you have logged in to LPA Admin, you will find the main menu at the left of the screen, if using a desktop. Click the arrow to expand the menu options. The menu options are named Applications, LPA Details and Document Requirements.

Note: on smaller devices, such as tablet, the menu can be found at the top right of the screen.

We recommend using Edge or Chrome browsers to access LPA Admin.



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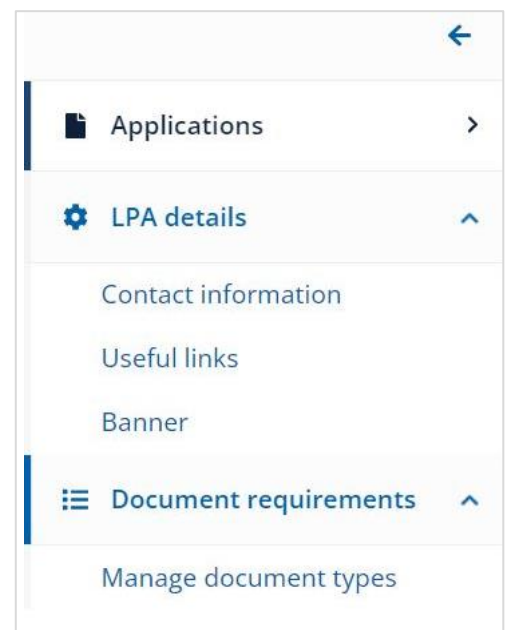
## Applications

### How to view applications via LPA Admin

View applications submitted to your Local Authority by clicking the arrow on the far left to expand the menu and choosing Applications.

This will show all applications in your Local Authority account. You can sort the applications by date, type, chronological reference number and status. Or you can filter by Submitted, Transmitted or Archive status.

Once you have the filtered list, the applications can be viewed or downloaded by clicking the ellipsis (three dots) function to the right of the entry. Or check the box of each application to bulk or singularly archive. You can also navigate applications using the search and filter functions.

When applications are submitted via the Planning Portal, LPAs can either download them:

- **Automatically** - Via a connector to their back-office system; or

- **Manually** - By accessing the application directly in their LPA home page on the Planning Portal.

### Manual downloads for LPAs who have a connector in place

If the automated connector fails to download an application, it will have to be downloaded manually.

This includes any application types that are not supported by the version of the Planning Portal data standard ('schema') that your connector is using. If you are using version 2.0 or later, all current online application types can be automatically downloaded.

Some application types require a specific version of the schema to be used to automatically download them (for example non-Material Amendments require schema version 1.3 or higher to automatically download, and many Prior Approvals require schema version 2.0 or higher to automatically download). If you are not using the requisite schema version, or higher, then those application types submitted to your Local Authority will need to be downloaded manually from LPA Admin.

We recommend that all LPA's should ensure their IT supplier keeps up-to-date and supports the current version of our data standard. You can check what version of the data standard your LPA is using by contacting your IT supplier or our service desk (details below).

## Other reasons for using manual downloads

Where an LPA does not have a connector in place, they will only be able to download applications manually.

It is also worth noting, that any previously downloaded application can be re-downloaded manually at any time.

## Manually downloading applications

Once you sign in and access your LPA home page, the applications available to download will be listed in three statuses: Submitted; Transferred; and Archived.

## Submitted applications

Initially, applications 'Submitted' to your LPA will be shown, you can sort the list as required. You will see the Planning Portal reference number and date submitted for each application which will match the details in the email notifications your LPA receives.

You will also see the version number and, if relevant, the date it was initially downloaded.

## Downloading

In the 'Actions' column on the right is the 'Download' link.

> If you are downloading the application manually, it is important that you click on the 'Download' link here as it will generate an email to the applicant/agent to notify them that your LPA has received their submission. This will also remove the application from the submitted list.
>
> It will also flag the application as downloaded, change the status to 'Transferred' and move the application to the 'Transferred' status in your and the applicant/agent accounts.
>
> Downloading the individual application forms and supporting documents from within the application itself will not trigger these critical actions, and there will be no notifications or status changes to indicate that the application has been downloaded

Once you click the 'Download' link, you will be asked to confirm the download. Once confirmed, your browser will prompt you to open or save a 'zip' format file. We recommend saving this 'zip' file. Once saved, all the application files can be extracted to a specific folder on your device/network; or to your document management system as required.

## Transferred and Archived applications

The other two statuses in your application list will show applications that have already been 'Transferred' (i.e. downloaded automatically or manually) or 'Archived'.

If a 'Transferred' application has not been correctly received, you can click the 'Not received' action to return the application to the 'Submitted' list in a non-downloaded state. This will allow your connector to try to download the application again automatically.

You can also use the 'Archive' action on 'Transferred' applications to move them into the 'Archived' tab.

If you would like to archive multiple applications, please contact our service desk (details below) to request this.

## Downloaded applications

The 'zip' file downloaded from our system contains all the individual application forms, supporting documents and associated files:

- **Application form** - Two copies of the application form (one complete and one with certain personal details redacted).

- **Supporting Documents** - All the attachments submitted by the applicant/agent.

- **Document summary** - A PDF document detailing the supporting documents

- **Fee summary** - A PDF document detailing how the fee was calculated by the applicant/agent.

- **Application data** - An xml file containing the application data (where available).

## Planning Portal service desk

Our service desk can assist with any issues you may have in accessing and downloading your applications. Please have the Planning Portal application reference(s) ready so we can find the application(s) you need help with.

Email:  support@planningportal.co.uk

Call:    0333 323 4589

Service desk hours: Monday - Friday, 9am - 5pm (excluding bank holidays)

## Menu options - LPA details

Change your LPA details by selecting from the expandable main menu on the left.

### Contact information

Use this area to update LPA contact information that is presented to an applicant when they are creating an application on the Planning Portal. This will be shown on the applicant's screen after they have completed the site area details, subsequently assigning the LPA. This information will also be shown in the results of our Find your LPA tool.
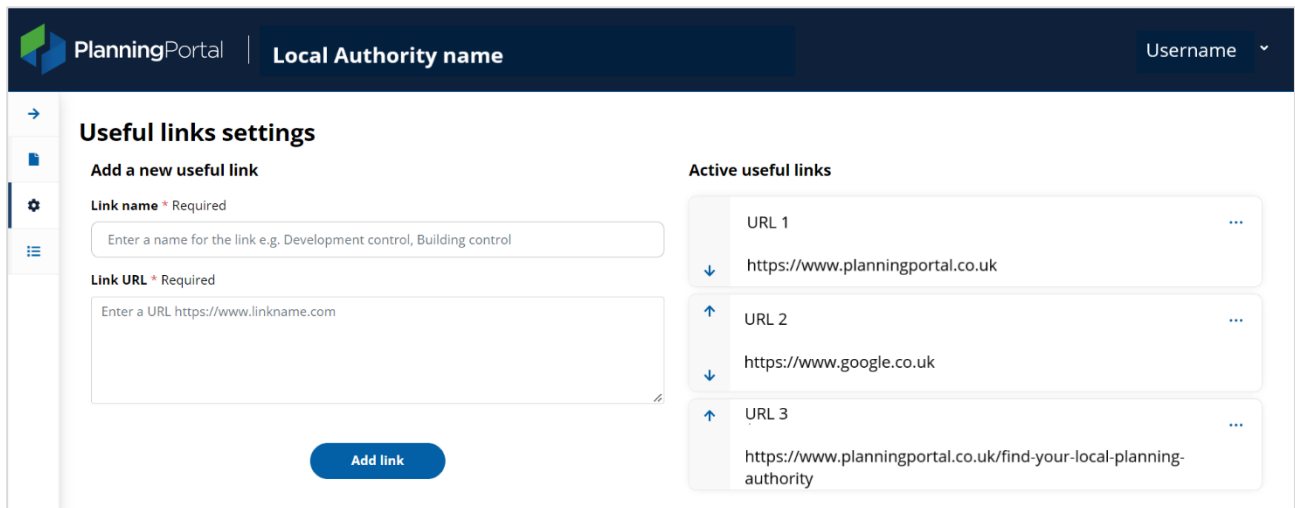
Each drop down section has help information to advise what information you can include.

If an area isn't active so cannot be edited, you will need to contact our Service Desk team and they may be able to make changes for you or advise how.

Once you have finished making amendments, be sure to click the Save changes button.

### Useful links

The website links added here will be displayed to applicants alongside LPA contact information in the application process. You can add up to eight links here to direct applicants to useful information on your LPA website.

## Banner

The ability for LPAs to update the image displayed on paper forms can be done in LPA admin. Simply drag and drop the image into the area. **This functionality is currently disabled.**

**Please note the following requirements for banner images:**
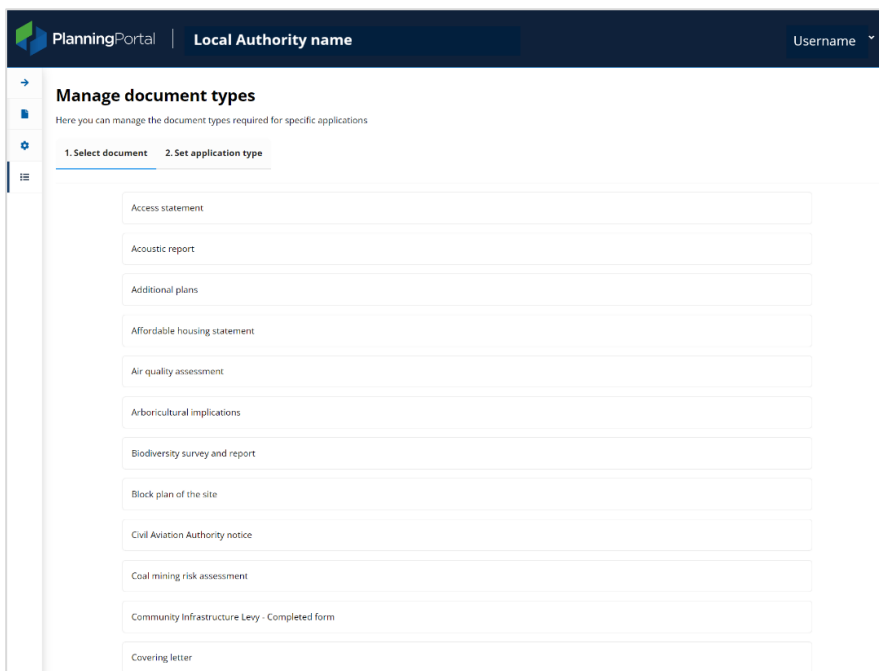
- File format:    Jpeg
- Image width:  2433 pixels
- Image height: 413 pixels
- Image print resolution: 300dpi

# Document requirements

In the document requirements section, you can manage the document types required for specific applications. For example, assigning a mandatory document type specific to your Local Authority, known as planning application requirements (PAR).
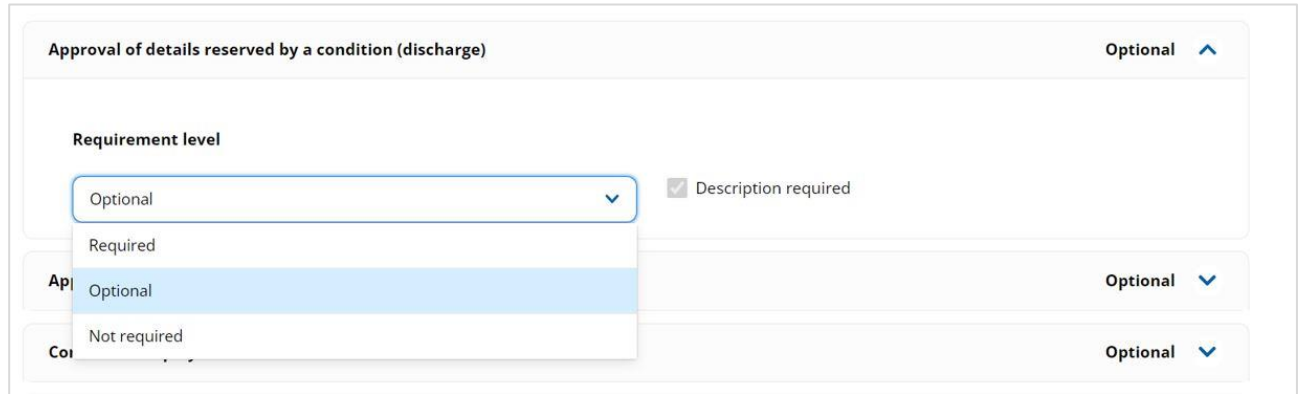
## Manage document types (PAR)

Configure your PAR settings by selecting the document type from the list and defining which application will require a document type.

After choosing a document type, you will be presented with a list of application types. Use the drop down on the right of each application type to configure if the document is required or optional.



You may notice that many of these document names do not have a corresponding drop-down menu. That means you are unable to edit the settings, because these documents have had their settings stipulated by the government. Since there is no option for LPAs to change these settings, the drop-down menu is not needed.

Once you have applied the desired settings to all the documents on this page, you should scroll down to the bottom of the screen and click the blue 'Save changes' button.

## Provide local level requirements

Please provide us with a link to your Planning application requirements and we will ensure it is included in the 'local level requirements' section which sits within the application service This way, users will have sight of all the documentation you require or request for each application.



**Find out about local level document requirements**

Find out more ↗

## Further help and information

If you need any help with customising your local authority's planning application requirements on the Planning Portal, please contact our service desk by emailing support@planningportal.co.uk