How to manage your organisation administration account

The basic structure of an organisation in the NSW Planning Portal is:

Organisation → Workgroup → Service/s → User/s

Within an organisation there should be at least two users assigned to the role of "Organisation Administrator". The organisation administrator/s can add users and workgroups to their organisation, configure system generated email notifications and edit organisation details.

This quick reference guide has the following sections:

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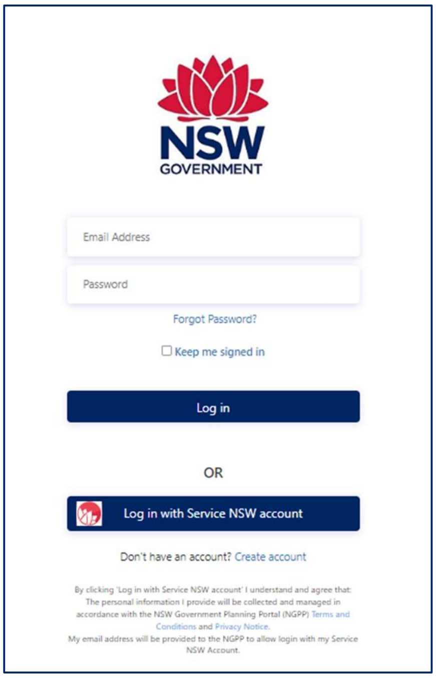
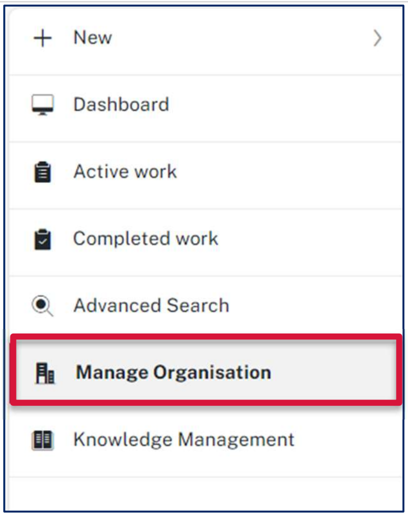
SF23/15060

View the administration dashboard

The functionality contained within this document is accessed from this dashboard.

To view the administration dashboard:

1. **Log in** to the NSW Planning Portal using the organisation administrators' account details.	
2. **Select** "Manage organisation" from the left-hand menu.	

The organisation details page will open. From this page you can:

- edit the organisation details
- manage users
- manage workgroups

Add an organisation administrator

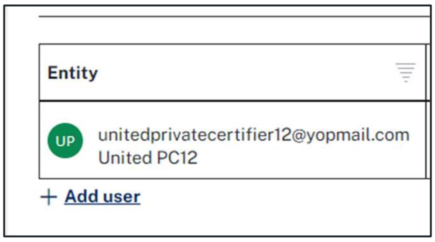
To add an organisation administrator to your organisation they must have a registered NSW Planning Portal account.

To add an organisation administrator:

1. On the homepage for your organisation, select "Manage users".

A table will display with all previously assigned users for your organisation.

2. Click "Add user" which is located underneath this table, to open the search screen.



3. Enter the user email address in full and click "Search" to locate the user.

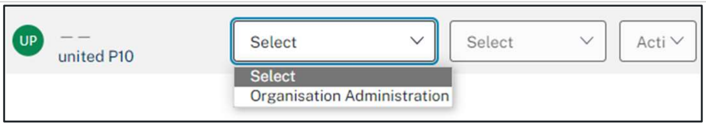
4. Click "Select" to select the correct user from the list.
   Note: The text in the "Associate user?" column will change to selected.

Search results

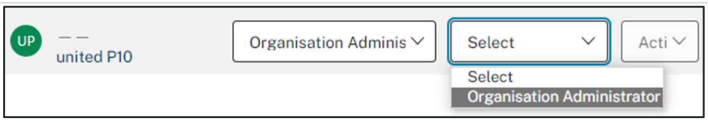
First given name	Family name	Email id	Associate user?
united	P10	unitedprivatecertifier11@yopmail.com	Select

5. Click submit to continue.

6. Select "Organisation administration" from the service name drop-down.



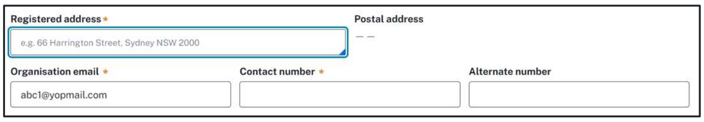
7. Select "Organisation administration" from the service role name drop-down.



By default the status will be "Active".	
8. Click "Submit". Note: The users section of the dashboard will be updated to include the new organisation administrator. If this does not update immediately, please refresh.	
9. Click "Close" to close the window and return to the dashboard.	

Edit the organisation details

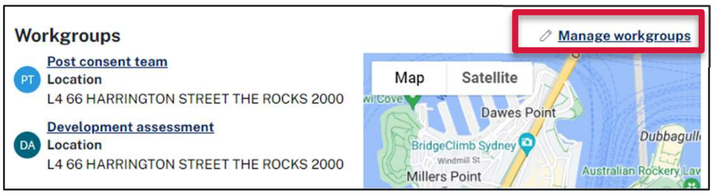
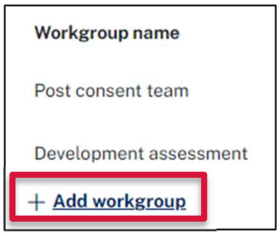
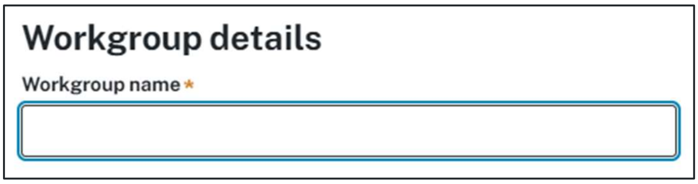
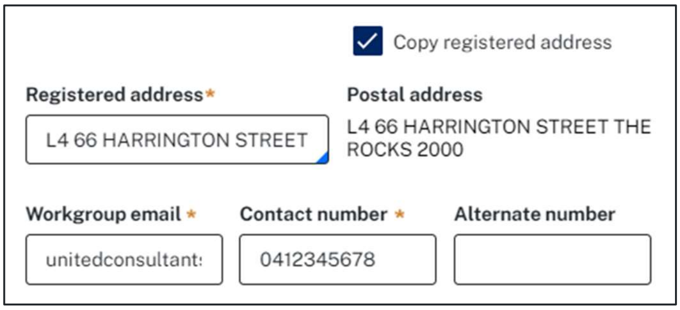
Administrators can edit an address, phone or contact details within their organisation. The following fields are read-only and are unable to be amended: Organisation type, Organisation name, ABN / ACN and trading name.

To edit the organisation details:	
1. On the homepage for your organisation, click "Edit details".	
2. Edit the relevant field/s and click submit.	
3. Click "Submit" to save the edited fields, or "Cancel" to return to the dashboard.	
4. If you have made an edit, the status will show as "Complete" in the top banner. Click "Close" to return to your organisation dashboard.	

Add a workgroup

<u>Note</u>: Each workgroup must be created before you can assign the relevant digital services and users.

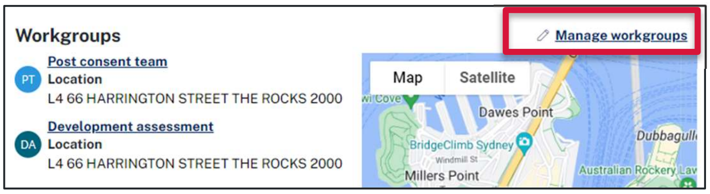
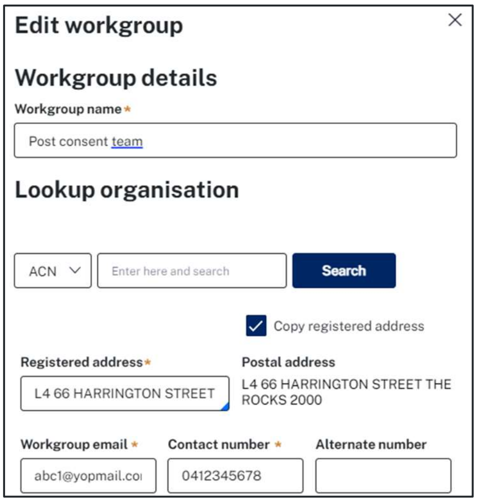
The organisation administrator can add multiple workgroups for their organisation. If a workgroup needs to be deleted, the organisation administrator will need to contact customer service.

To add a workgroup:	
1. On the homepage for your organisation, select "Manage workgroups".	
2. Click "Add workgroup". This is located under the list of workgroups already configured.	
3. Enter the workgroup name.	
4. Amend any organisation details if required. <u>Note:</u> The fields will be pre-populated from the organisation details.	
5. Click "submit" to continue. The new workgroup will appear in the workgroup table.	
Repeat steps 2 to 5 until you have added all relevant workgroups.	

6. Click "Submit" to return to your dashboard.	
7. Click "Close" in the top banner to return to your dashboard.	

Edit the details for a workgroup

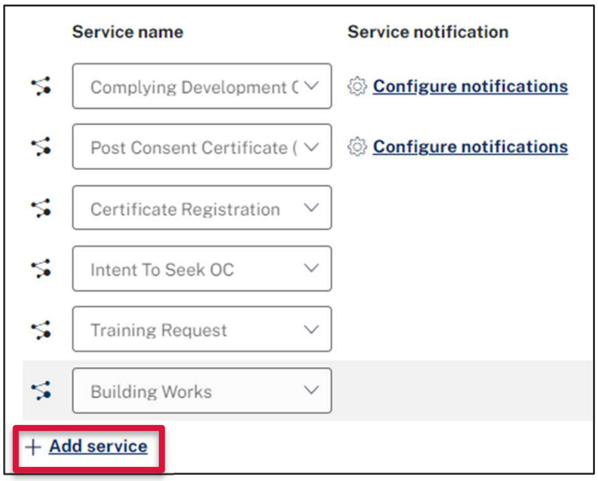
The details associated with a workgroup can be amended by the organisation administrator.

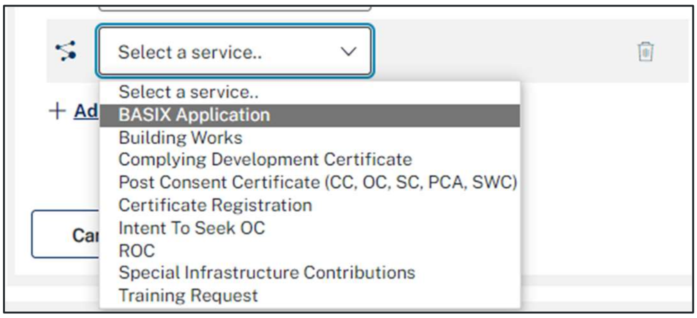
To amend the workgroup details:	
1. On the homepage for your organisation, select "Manage workgroups".	
2. Click "Edit" beside the workgroup you wish to amend.	
3. Amend the details as required.	
4. Click "Submit" to continue.	
5. Click "Submit" to return to your dashboard.	
6. Click "Close" in the top banner to return to your dashboard.	

Add a digital service to a workgroup

Note: A service can only be assigned to one workgroup. To move a service from one group to another, the organisation administrator will need to contact customer service.

The list of services available for an organisation is defined based on the type of organisation, with only those services relevant being able to be selected.

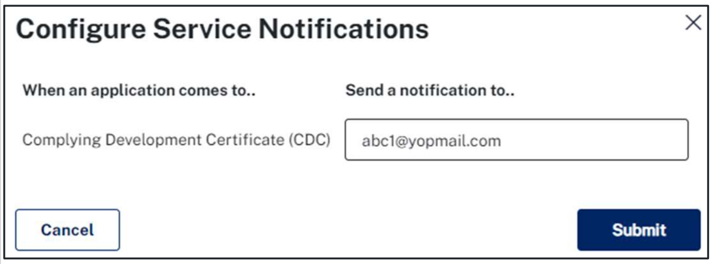
To add a service to a workgroup:	
1. On the homepage for your organisation, **select** the relevant workgroup by clicking on the blue title.	
2. **Select** "Manage services" located on the right-hand side of the screen.	
3. **Click** "Add service". This is located under the list of services.	

4. **Select** the service from the drop-down list. The list will only display those services relevant to your organisation type. Repeat steps 3 and 4 until you have added all relevant services.	
If you select a service associated with another workgroup, an error message will be displayed.	
5. **Click** "Submit" to continue.	
6. **Click** "Close" in the top banner to return to your dashboard.	

Configure system generated email notifications

The system generated notifications for some services can be configured by the organisation administrator.

To configure the notifications for a service:	
1. On the homepage for your organisation, **select** the relevant workgroup by clicking on the blue title.	
2. **Select** "Manage services" located on the right-hand side of the screen.	

3. **Click** "Configure notifications" beside the relevant service name. Note: This option will only display if that service can be customised.	
4. **Enter** the email address that you would like the service system generated notifications to be sent to. Note: This field will automatically display the organisation email address.	
5. **Click** " Submit" to continue.	

Assign users to a workgroup and service

Notes:

1. If a user needs to be assigned to multiple services, complete the steps below for each service.
2. A user can only be assigned to one workgroup.

Once a service has been added to your workgroup, you can assign users to that workgroup and the relevant service within a workgroup.

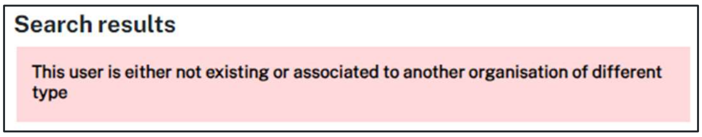
To assign a user to a workgroup and the service/s within that workgroup:	
1. On the homepage for your organisation, **select** the relevant workgroup by clicking on the blue title.	
2. **Select** "Manage users". A table will display with all users currently assigned to that workgroup.	

3. **Click** “Add user” to open the search screen.

4. **Enter** the user email address in full and **click** “Search” to locate the user.

   Note: The user must have registered for a NSW Planning Portal account to be assigned to a workgroup.

   If the email address is not found, an error message will display. Please check that the user has a registered NSW Planning Portal account and has been assigned to your organisation before trying again.



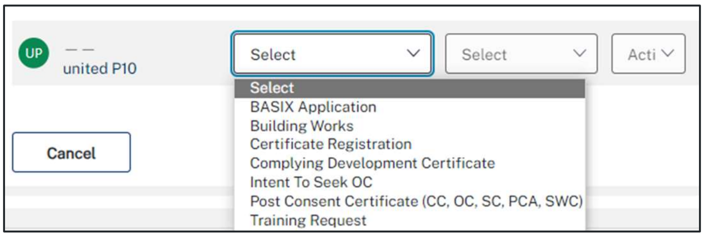
5. **Click** “Select” to add the user to the workgroup.

   Note: The text in the “Associate user?” column will change to “Selected”.

6. **Click** submit to continue.

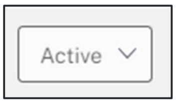
7. **Select** the service name from the drop-down list.

   Note: This will only display services associated with this workgroup.



8. **Select** the service role from the drop-down list.

   By default the status will be “Active” and cannot be amended from this screen.



   Click on the garbage bin icon at the end of the row to remove this user from the workgroup.

9. **Click** “Submit”.

10. Click "Close" to close the window and return to the dashboard.	

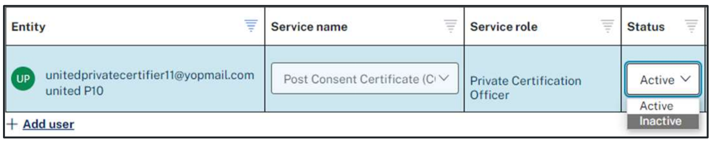
Change a user's status to "Inactive"

Notes:

1. Prior to amending the user status, please ensure that all applications within the NSW Planning Portal digital services have been re-allocated to other staff members.
2. An existing organisation administrator cannot change their own status to "Inactive". This can only be performed by another organisation administrator.

When a staff member leaves the organisation, or their role changes, the organisation administrator can change their status to "Inactive". You are unable to delete the user.

To change a user's status to inactive:

1. On the homepage for your organisation, **select** the workgroup the user is currently assigned to by clicking on the blue heading.	
2. **Click** "Manage users".	
3. **Locate** the user and **select** "Inactive" in the status column. Note: You can filter the users using the funnel beside each column heading.	
4. **Click** "Submit".	
5. **Click** "Close" to close the window and return to the dashboard.	

More information

We have developed a range of support materials, including Quick Reference Guides for other services and Frequently Asked Questions (where applicable), to assist you when using the NSW Planning Portal digital services. You can access these via in the Help and Resources section of the NSW Planning Portal. We encourage you to scan these resources prior to contacting the Customer Support team.

We also offer a range of training sessions on the NSW Planning Portal digital services. You can view and/or register for upcoming training on the Information and Training sessions page of the NSW Planning Portal.

If you require further assistance, please contact ServiceNSW on 1300 305 695 or submit an enquiry online. If you are calling from outside Australia, please call +61 2 8894 1555.