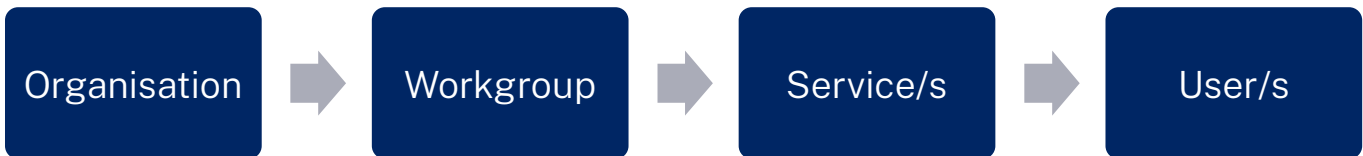


How to manage your organisation administration account

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



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:

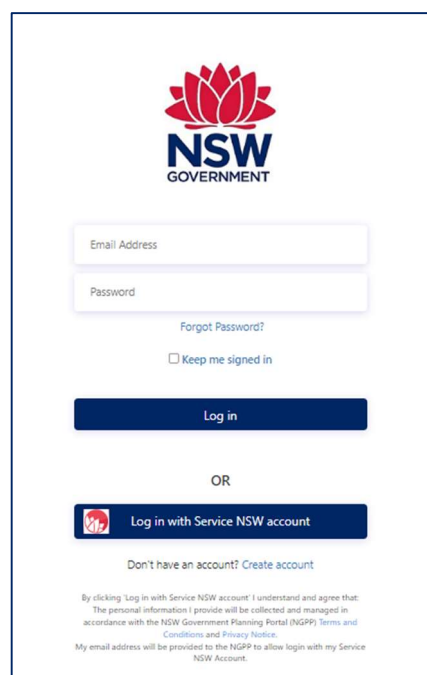
View the administration dashboard	2
Add an organisation administrator.....	3
Edit the organisation details.....	4
Add a workgroup.....	5
Edit the details for a workgroup.....	6
Add a digital service to a workgroup.....	7
Configure system generated email notifications.....	8
Assign users to a workgroup and service.....	9
Change a user’s status to “Inactive”.....	11
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View the administration dashboard

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

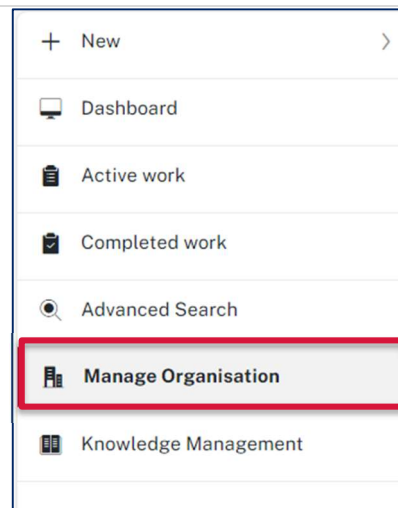
To view the administration dashboard:

1. **Log in** to the NSW Planning Portal using the organisation administrators' account details.



The login screen features the NSW Government logo at the top. Below it are input fields for 'Email Address' and 'Password'. A 'Forgot Password?' link is positioned between the password field and a 'Keep me signed in' checkbox. A prominent blue 'Log in' button is centered below these elements. An 'OR' separator is followed by a 'Log in with Service NSW account' button, which includes the Service NSW logo. At the bottom, there is a link for 'Don't have an account? Create account' and a small disclaimer about data collection and terms of use.

2. **Select “Manage organisation”** from the left-hand menu.



The left-hand menu is a vertical list of options. It starts with a '+ New' button at the top, followed by 'Dashboard', 'Active work', 'Completed work', 'Advanced Search', 'Manage Organisation' (which is highlighted with a red rectangular border), and 'Knowledge Management' at the bottom. Each item is accompanied by a small icon representing its function.

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

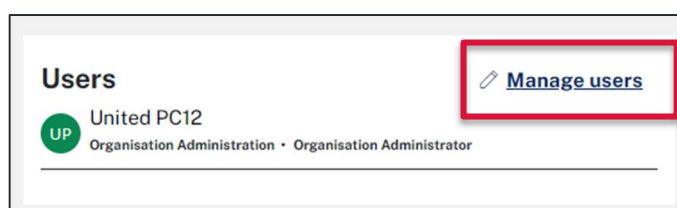
- edit the organisation details
- manage users
- manage workgroups

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”.



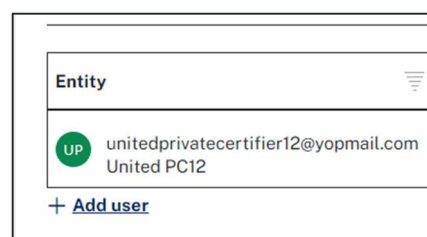
Users

United PC12
Organisation Administration • Organisation Administrator

[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.



Entity

UP	unitedprivatecertifier12@yopmail.com	United PC12
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[+ Add user](#)

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



User search

Email *

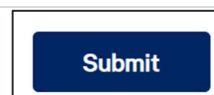
[Search](#) [Clear](#)

4. **Click** “Select” to select the correct user from the list.

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

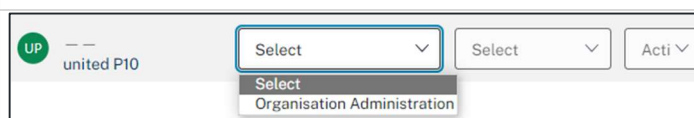
Search results			
First given name	Family name	Email id	Associate user?
united	P10	unitedprivatecertifier11@yopmail.com	Select

5. **Click** submit to continue.



Submit

6. **Select** “Organisation administration” from the service name drop-down.



UP -- united P10

Select

Select

Organisation Administration

7. **Select** “Organisation administration” from the service role name drop-down.



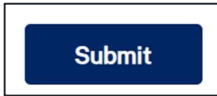
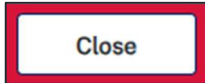
UP -- united P10

Organisation Adminis

Select

Select

Organisation Administrator

By default the status will be “Active”.	
8. Click “Submit”. <u>Note:</u> 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.	

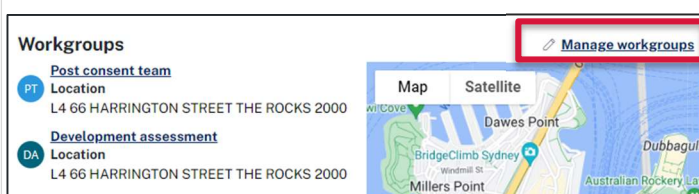
Add a workgroup

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

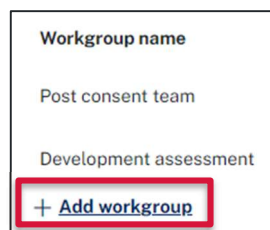
The organisation administrator can add multiple workgroups for their organisation. If a workgroup needs to be deleted, the organisation administrator will need to contact customer service.

To add a workgroup:

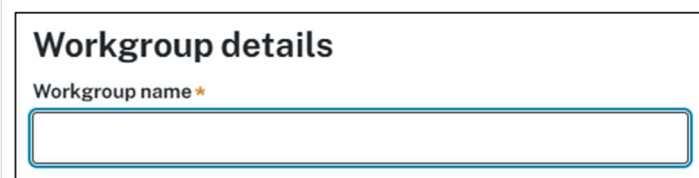
1. On the homepage for your organisation, select “Manage workgroups”.



2. Click “Add workgroup”. This is located under the list of workgroups already configured.

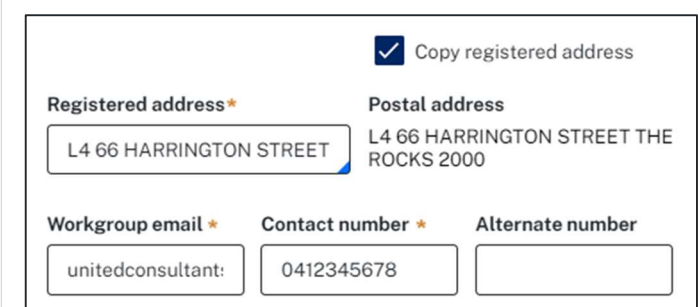


3. Enter the workgroup name.



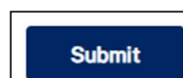
4. Amend any organisation details if required.

Note: The fields will be pre-populated from the organisation details.

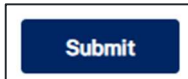


5. Click “submit” to continue.

The new workgroup will appear in the workgroup table.



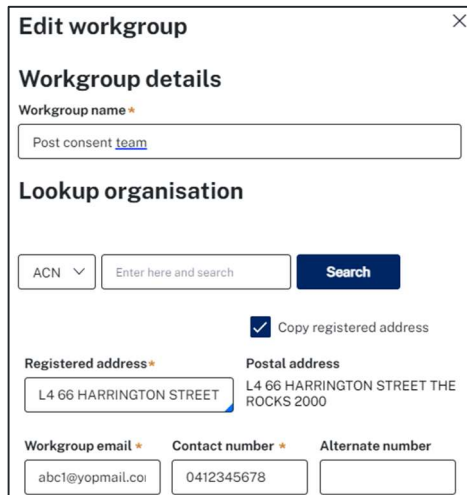
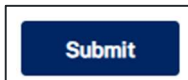
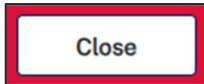
Repeat steps 2 to 5 until you have added all relevant workgroups.

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.

Workgroups

- [Post consent team](#)
PT Location
L4 66 HARRINGTON STREET THE ROCKS 2000
- [Development assessment](#)
DA Location
L4 66 HARRINGTON STREET THE ROCKS 2000

2. **Select** “Manage services” located on the right-hand side of the screen.

Services

[Manage services](#)

- Complying Development Certificate
- Post Consent Certificate (CC, OC, SC, PCA, SWC)
- Certificate Registration
- Intent To Seek OC
- Training Request
- Building Works

3. **Click** “Add service”. This is located under the list of services.

Service name

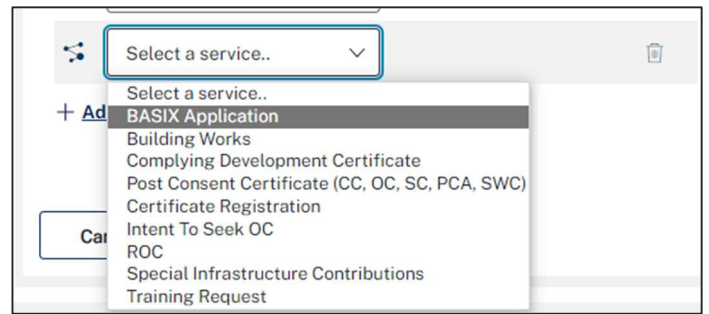
Service notification

- Complying Development C [Configure notifications](#)
- Post Consent Certificate ([Configure notifications](#)
- Certificate Registration
- Intent To Seek OC
- Training Request
- Building Works

[+ Add service](#)

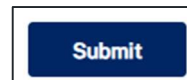
4. **Select** the service from the drop-down list.
The list will only display those services relevant to your organisation type.

Repeat steps 3 and 4 until you have added all relevant services.

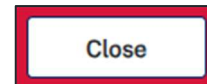


If you select a service associated with another workgroup, an error message will be displayed.

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.

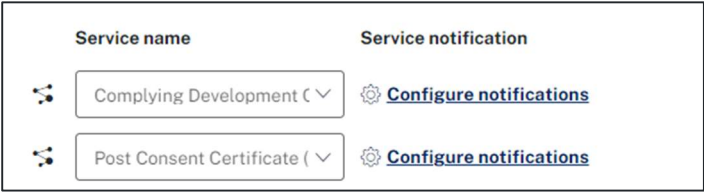
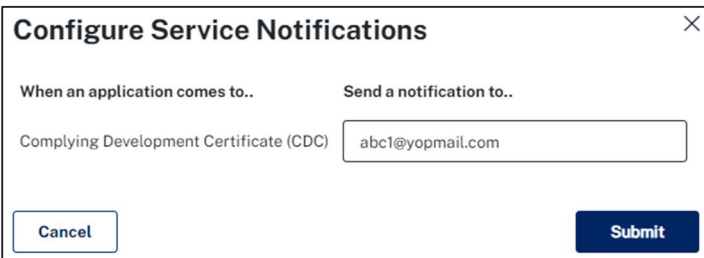
To configure the notifications for a service:

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. <u>Note:</u> This option will only display if that service can be customised.	 The screenshot shows a table with two rows. The first row is for 'Complying Development' and the second is for 'Post Consent Certificate'. Each row has a 'Configure notifications' link next to a gear icon.
4. Enter the email address that you would like the service system generated notifications to be sent to. <u>Note:</u> This field will automatically display the organisation email address.	 The screenshot shows a dialog box titled 'Configure Service Notifications'. It has two sections: 'When an application comes to..' and 'Send a notification to..'. The first section has a dropdown menu showing 'Complying Development Certificate (CDC)'. The second section has a text input field containing 'abc1@yopmail.com'. There are 'Cancel' and 'Submit' buttons at the bottom.
5. Click “Submit” to continue.	 The screenshot shows a single blue button with the text 'Submit'.

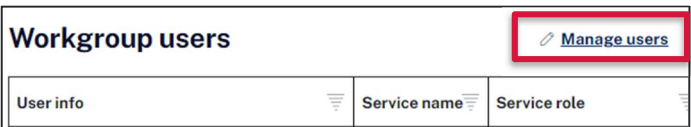
Assign users to a workgroup and service

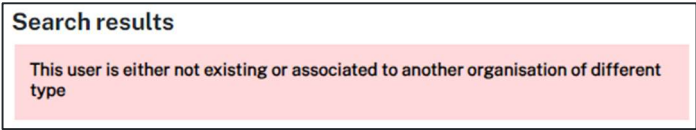
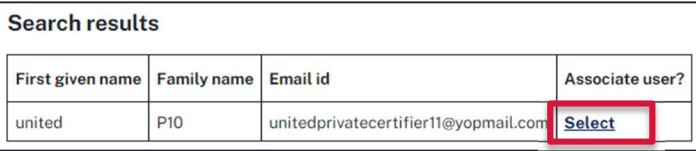
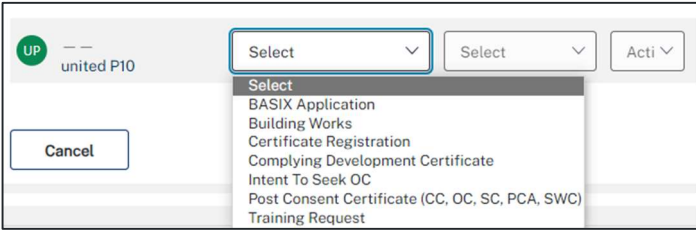
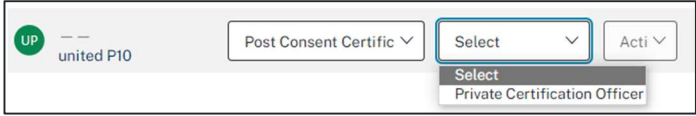
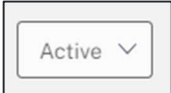
Notes:

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.	 The screenshot shows a section titled 'Workgroups'. It contains two entries: 'Post consent team' with a blue circle icon and 'Development assessment' with a green circle icon. Both entries have a 'Location' field with the address 'L4 66 HARRINGTON STREET THE ROCKS 2000'.
2. Select “Manage users”. A table will display with all users currently assigned to that workgroup.	 The screenshot shows a table titled 'Workgroup users'. There is a 'Manage users' link in the top right corner. The table has three columns: 'User info', 'Service name', and 'Service role'.

3. Click “Add user” to open the search screen.	
4. Enter the user email address in full and click “Search” to locate the user. <u>Note:</u> 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. <u>Note:</u> 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. <u>Note:</u> 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.

Close

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.

Workgroups

- [Post consent team](#)
Location
L4 66 HARRINGTON STREET THE ROCKS 2000
- [Development assessment](#)
Location
L4 66 HARRINGTON STREET THE ROCKS 2000

2. Click “Manage users”.

Workgroup users

[Manage users](#)

User info	Service name	Service role	Status
-----------	--------------	--------------	--------

3. **Locate** the user and **select** “Inactive” in the status column.

Note: You can filter the users using the funnel beside each column heading.

Entity	Service name	Service role	Status
 unitedprivatecertifier11@yopmail.com united P10	Post Consent Certificate (C)	Private Certification Officer	Active
			Active Inactive

4. Click “Submit”.

Submit

5. Click “Close” to close the window and return to the dashboard.

Close

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.