

Introduction to the Agency Dashboard

Subtitle

May 2019

The Agency User Dashboard



This guide covers using the User dashboard. For Administration dashboard information, please see the **How to use the Administration Dashboard** guide.

To view your dashboard, you will need to be logged into the ePlanning Portal. The link can be found here:

<https://apps.planningportal.nsw.gov.au/prweb/IAC>

If you do not have a NSW Planning Portal account, see **How to register for a Planning Portal account** for a step-by-step registration guide.

The Dashboard

Once logged in, you will land on your dashboard. The Dashboard is the starting point for reviewing content within the ePlanning Portal.

Please note: When viewing your dashboard, the window mimics internet web page behavior. This means that when the screen is minimised, to access the tab bar of your dashboard you will have to click on the hamburger icon depicted as three horizontal lines on the top left-hand corner as shown below:



To keep a full view of your dashboard, keep your screen fully maximized.

To be able to see the full screen without scrolling up and down, your computer resolution needs to be set up as 100%. For windows computers, go to 'Display setting', then 'Scale and layout' and then 'Resolution' to adjust resolution settings.

For Agency User view, see **step 3: Agency User View**.

For Agency Administration view, see **step 4: Agency Administration View**.

Introduction to the Agency Dashboard

Subtitle

May 2019

Step 3: Agency User View

Upon log in, Agency users will view the below dashboard.

Please note: At this stage, the “New” tab on the left-hand side of the Agency user dashboard is disabled.

At the top of your dashboard you will view:

- A search feature: This is for you to free text any searches via your dashboard.
- A black dot: This is the accessibility feature. Click on the black dot to enter and exit out of the accessibility feature, as required.
- “Log off” button: This is the button you can click to log off the online concurrence and referral system
- “Help” button: This is the button you can click on for links to extra help and support.
- “Contact Us” button: This is the button you can click on for a link to NSW Department of Planning and Environment contact information.

The screenshot displays the NSW ePlanning Agency Dashboard. At the top right, there is a search bar, a log off button, and help/contact us links. The main content area is divided into several sections:

- User Profile:** Rebecca Carlsen (RC).
- Unassigned Tasks:** A table showing 535 tasks under the category 'Concurrences and Referrals'.
- Assigned Tasks:** A list of tasks assigned to various users, including Christine DPEAgency (54), Christine dpeagency1 (0), civ agency (3), CNRDPEAgency (14), dpeagency user1 (11), DPE User1 (9), Gautam Gandha (0), Mohan Kona (0), and Rebecca Carlsen (0).
- Case Stages:** A section showing case stages for 'Concurrence and Referral - Agency'. It includes a progress bar for Pre-assessment (7), Assessment (7), and Decision (13).
- Cases by Stages:** A donut chart showing 169 cases across three stages: Pre-assessment (blue), Assessment (orange), and Decision (grey).

a. You can view and search for jobs.

The Agency User dashboard view will show a list of all jobs of a range of work types assigned to you.

Introduction to the Agency Dashboard

Subtitle

May 2019

Please note: This dashboard view of your jobs is a read-only view. To action work on your jobs you will have to access cases via your “Active Work” tab to edit. See step 3.b. below.

Click the filter icon to sort by “Reference Number”, “Site Address”, “Status”, “Days Lapsed” or “Application type” to find a specific job.

- “Days Lapsed”: This shows the number of days which have lapsed since the Development Application has been created and lodged.
- “Reference Number”: This is the system generated reference number to give each application job an independent identification number. For example, Agencies will see concurrence and referral cases as “A-xx” or “CL-xx” for Biodiversity clause assessments.

Please note: These agency reference numbers act as the child case number to a parent system generated “CNR-xx” reference number as one development application can result in one or more agency assessment requests.

- “Site Address”: This displays the primary address input when Concurrence and Referral case or applications are created.
- “Status”: This represents the stage of the workflow that the case is currently at.
- “Application type”: This is a unified dashboard which caters for several work and application types to flow through the online system. Agencies however, will currently see only “Agency Concurrence and Referral” application jobs at this stage.

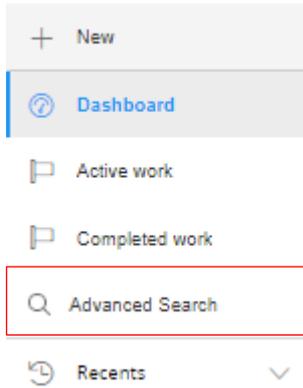
Performance	Days Lapsed	Reference Number	Site Address	Status	Application Type
	1	CNR-2783	55 Linden Street, Sutherland, 2232	Decision received	
	4	PAN-997	55 Linden Street, Sutherland, 2232	Under assessment	
	4	PAN-903	20 Linden Street, Sutherland, 2232	Under assessment	
	3	CNR-2888	32 Linden Street, Sutherland, 2232	Under assessment	
	3	PAN-950	55 Linden Street, Sutherland, 2232	Under assessment	
	3	PAN-918	88 Linden Street, Sutherland, 2232	Under assessment	
		CNR-2929	70 Linden Street, Sutherland, 2232	In progress	
	0	PAN-963	70 Linden Street, Sutherland, 2232	Under assessment	

Introduction to the Agency Dashboard

Subtitle

May 2019

Alternatively, you can click “*Advanced Search*” on the left-hand side of your dashboard to use the advanced search functionality. See *HowTo use advanced search* for a more detailed step-by-step guide.



Please note: To open a concurrence or referral job, click on the reference number hyperlink, as required. The hyperlink will be represented by an underline and blue font. You will not be able to open the case by clicking on the “Performance”, “Site address”, “Status” or “Application type” relating to the case.

b. **You can have a view of the work queue for jobs allocated to you.**

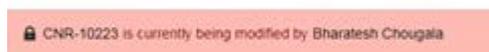
Clicking the “*Active Work*” tab on the left-hand side. You will have a view of all the jobs allocated to you. You can

A screenshot of the 'Active work' view in the dashboard. The left-hand navigation menu shows 'Active work' selected. The main area displays a table of active work items with the following columns: Performance, Days Lapsed, Reference Number, Site Address, Status, and Application Type.

Performance	Days Lapsed	Reference Number	Site Address	Status	Application Type
		CNR-2929	70 Linden Street, Sutherland, 2232	In progress	Concurrence and Referral
	0	PAN-963	70 Linden Street, Sutherland, 2232	Under assessment	DA Online
	3	PAN-050	55 Linden Street, Sutherland, 2232	Under assessment	DA Online
	3	CNR-2886	32 Linden Street, Sutherland, 2232	Under assessment	Concurrence and Referral
	3	PAN-918	88 Linden Street, Sutherland, 2232	Under assessment	DA Online
	4	PAN-003	20 Linden Street, Sutherland, 2232	Under assessment	DA Online
	1	CNR-2783	55 Linden Street, Sutherland, 2232	Decision received	Concurrence and Referral
	4	PAN-897	55 Linden Street, Sutherland, 2232	Under assessment	DA Online

filter as you would on your dashboard to find a specific job.

Please note: Only one user can work on a case at a time. If you intend to edit a case at the same time as someone else, a message will come up to notify you that the case is locked. Example below:

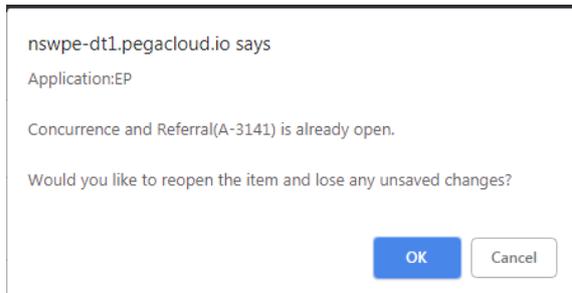


Introduction to the Agency Dashboard

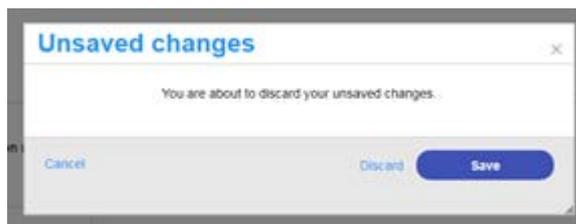
Subtitle

May 2019

Where you are in edit mode and working on a case, if you do not click “save and exit” and close the window, the next time you re-open the case, the screen will ask if you want to lose previous unsaved changes:



Where you press “Close and Home” on an open case, you will close the case window and return to your dashboard. Upon re-opening the case the following message will pop up if you have pressed “Close and Home” without first saving edits:



Please note: Similarly, where you press “Cancel” the above message will appear as a confirmation window in case the user has pressed “Cancel” in error. Where the user discards changes, all input data will be lost.

If a user does not click “Cancel”, “Save and Exit” or “Submit” and navigates out of the opened case screen view (e.g. clicking on another tab on the left-hand side of the screen to redirect the screen elsewhere), the case will be locked out to them for the next 30 minutes. This means that other users will not be able to work on the case. Alternatively, the user will have to log out of the system entirely for the locked cases in their name to be unlocked.

c. **You can have a view of all closed cases that have been allocated to you.**

Click the “Completed Work” tab on the left-hand side. You will have a view of all the jobs allocated to you. You can filter as you would on your dashboard to find a specific job.

Introduction to the Agency Dashboard

Subtitle

May 2019

Reference number	Site address	Status	Days Lapsed	Application type
CNR-2005	41 Carina Road, Cyster Bay, 2225	Approved	2	Concurrence and Referral
CNR-2063	55 Linden Street, Sutherland, 2232	Approved	0	Concurrence and Referral
CNR-1357	19-33 Systum Street, Ultimo, 2007	Resolved-Cancelled		Concurrence and Referral
CNR-1858	31 320 Pitt Street, Sydney, 2000	Resolved-Cancelled		Concurrence and Referral
PAW-045	10 Linden Street, Sutherland, 2232	Determined	0	DA Online
CNR-2087	19 Linden Street, Sutherland, 2232	Approved	3	Concurrence and Referral
PAW-017	1 Linden Street, Sutherland, 2232	Determined	0	DA Online
PAW-015	12-14 Linden Street, Sutherland, 2232	Determined	0	DA Online
CNR-2020	20 Linden Street, Sutherland, 2232	Approved	0	Concurrence and Referral
CNR-2744	19-33 Systum Street, Ultimo, 2007	Approved	0	Concurrence and Referral
CNR-2724	19-33 Systum Street, Ultimo, 2007	Approved	0	Concurrence and Referral
PAW-044	41 Carina Road, Cyster Bay, 2225	Returned		DA Online
PAW-033	23 Linden Street, Sutherland, 2232	Determined	0	DA Online
CNR-2508	77 King Street, Sydney, 2000	Resolved-Cancelled		Concurrence and Referral
CNR-1355	19-33 Systum Street, Ultimo, 2007	Approved	93	Concurrence and Referral
CNR-1959	Pittwater Road, Pittwater	Resolved-Cancelled		Concurrence and Referral
CNR-1859	31 320 Pitt Street, Sydney, 2000	Approved		Concurrence and Referral
CNR-1554	31 320 Pitt Street, Sydney, 2000	Approved		Concurrence and Referral
CNR-1553	31 320 Pitt Street, Sydney, 2000	Approved		Concurrence and Referral

d. **You can use the advanced search feature.**

Click on “Advanced Search” tab to access the advanced search feature.

See *HowTo Use Advanced Search* for a more detailed step by step guide on this functionality.

e. **You can view your recent searches.**

Click “Recents” for a short queue of your past 5 previously searched jobs for quick reference.

- Agency Concurrence and Referral A-7190
- Agency Concurrence and Referral A-7298
- Concurrence and Referral CNR-735
- Clause CL-3160
- Agency Concurrence and Referral A-7284

f. **You can view the list of assigned and unassigned tasks.**

On the right-hand side of your dashboard you will be able to view the number of all “Unassigned Tasks”, “Assigned Tasks” and corresponding quantities.

Unassigned Tasks

- Concurrence and Referral 13

Assigned Tasks

- An Applicant 0
- Binu 0
- Camden01 Council 0
- Camden02 Council 0
- cnr agency 0
- CNR Agency 0
- CNR Agri 3
- CNR Council 0
- CNR Council 3 0
- CNR Department of Educations Agency 15

[See all team members \(5\)](#)



Introduction to the Agency Dashboard

Subtitle

May 2019

Under the “Assigned Tasks” heading you will see a list of your agency team member names within your organisation that are assigned work and the quantity of work assigned to them.

Please note: In the event of both unexpected or expected leave, your organisation/team will have to co-ordinate who will pick up on a member’s work where work has been assigned. Once decided, the person picking up the work will have to assign the case to themselves to perform tasks via the system. To do this:

- i. Click on the Agency Team members name under “Assigned Tasks”
- ii. Select the case within their work queue that you have agreed to pick up
- iii. Click “Assign to me”

Please find the details related to this case in the tabs below. If you need to re-assign this case to yourself, click the “Assign to me” button.

Assign to me

- iv. Tick the box to “Assign this case to me”

- v. P
r

Case allocation details

Assigned to:
CNRC1 Blacktown

Email address:
CNRCouncil1BT@protonmail.com

Contact number:

Assign this case to me

Cancel Save and edit Submit

Submit” to confirm this action.

You will now be able to see the case reference number under your job queue for you to pick up and work on.

Introduction to the Agency Dashboard

Subtitle

May 2019

Under the “*Unassigned Tasks*” heading you can view applications that are not yet assigned to an agency team member. Agency incoming unassigned tasks via the online system will be concurrence and referral related. Click on “Concurrence and Referral” you will be directed to a page that has the heading “*Concurrence and Referral*” work basket for you to work on assignment. The below page will appear for you to view:

The screenshot shows the NSW ePlanning Dashboard. On the left is a navigation menu with options: New, Dashboard, Active work, Completed work, and Advanced Search. The main content area is titled 'Dashboard' and features a 'Concurrences and Referrals' section. This section includes a table with columns: Performance, Days Lapsed, Reference Number, Site Address, Status, and Application Type. A single row is visible with Reference Number 'A-2913', Site Address '250 High Street, Penrith, 2750', Status 'Review request', and Application Type 'Concurrence and Referral'. To the right of the table, there are two task count boxes: 'Unassigned Tasks' for 'Concurrences and Referrals' with a count of 86, and 'Assigned Tasks'.

Click a user name to view jobs allocated to a specific agency user or view unassigned applications (e.g. “Concurrence and Referral”) to view Assigned or Unassigned tasks, as preferred.

g. You can view case details via the tabs located within a case.

Open the case you wish to view details of. You can use the tabs to view case details as per below:

o “*Case details*”: This is a review of the concurrence and referral details that Council has filled with respect to the development application. Details include, development application details, applicant details

The screenshot shows the 'Case details' tab selected. It features several sections of information:

- Proposed development**
 - Council DA number : 453
 - Application type : Development application
 - Date DA was lodged : 22/02/2019
 - Development type : Residential - Single new dwelling
 - Development description : twent
- Applicant/Company contact information**
 - First given name : Thomas
 - Family name : Walsh
 - Email address : Thomasgeraldwalsh86@gmail.com
 - Contact number : 0444777888
 - Other Contact number : 0444777888
 - Billing address : 21-23 Link Street, Bingara, 2404
- Council assessing officer**
 - Council name : SUTHERLAND SHIRE COUNCIL
 - Contact name : Gautam Gandha
 - Contact email : gautam.gandha@caggemini.com
 - Contact number : —
- Additional application details**
 - Investment value : \$50,000.00

and corresponding council assessing officer details.

Introduction to the Agency Dashboard

Subtitle

May 2019

o “Documents”: This is the tab where you can review all attached documents to the case and who

Case details Documents Agencies Analytics Action Summary

Document name	Document type	Size	Organisation	Uploaded by	Upload date
Department of Planning and Environment Mock Upload.pdf	Biodiversity Assessment Method (BAM) Letter	24 KB	SUTHERLAND SHIRE COUNCIL	Rebecca Carlsen	22/02/2019 2:05 PM
Department of Planning and Environment_1550918937.pdf	Invoice	11 KB		System	22/02/2019 2:47 PM

attached them.

Please note: The online concurrence and referral system will keep all uploaded documents pertaining to a concurrence and referral case. However, it is advised you continue to save the documents into your organisation’s local data management system and continue with your current data management procedures. This is to capture all associated offline conversations and documentation as you do today. The concurrence and referral system should only be used to facilitate key formalised documentation uploads that the applicant will also be able to view.

o “Agencies”: This is the tab where you can review the Agencies selected for the concurrence and referral request. You will also be able to view corresponding clauses and assessment requests per agency.

Case details Documents Agencies Analytics Action Summary

Agency name	Requested clause	Clause type	Pre-assessment outcome	Assessment status	Remaining days
Department of Planning and Environment	State Environmental Planning Policy (Kurnell Peninsula) 1989 - Cl.22	Concurrence	Accepted		
	Roads Act 1993 s.149	Concurrence	Accepted		
	SEPP housing for seniors or people with disabilities	Concurrence	Accepted		3 days ago
	State Environmental Planning Policy (State Significant Precincts) 2005 - cl.20(4)	Concurrence	Accepted		

o “Analytics”: Here you can view key milestones details of the case as it proceeds through the workflow.

Case details Documents Agencies Analytics Action Summary

Reference number	Milestone	Date
1	DA lodged	22/02/2019
2	Request created	22/02/2019 2:05 PM
3	Submitted to agency	22/02/2019 2:05 PM
4	Agency pre-assessment	22/02/2019 2:16 PM
5	Payment	22/02/2019 2:47 PM
6	Assessment	26/02/2019 4:12 PM

Introduction to the Agency Dashboard

Subtitle

May 2019

o “Action Summary”: This is the tab to display the workflow track (e.g. Who has worked on the work and where the case has been passed on to) as well as email notifications. These are system generated items

History

Time	Description	Performed by
26/02/19 4:12 PM	Correspondence has been attached: NSW Government concurrence and referral request CNR-2886.	Service Level Agent
26/02/19 4:12 PM	Executing SLA action CallActivity.	Service Level Agent
26/02/19 4:12 PM	Executing SLA action CallActivity.	Service Level Agent

placed in chronological order to show all changes to the case within the stages of the workflow.

Please note: The mapping of user action functionality under the history heading is a disabled feature. You will not be able to see the location map of where the user performed the task.

These tabs will be available for your viewing of the case at any stage of the workflow for traceability and visibility.

h. You can save email notifications to your agency local drive.

- i. Open your selected concurrence and referral case you wish to save email notifications from.
- ii. Select the case and click on the “Actions Summary” tab.

The screenshot shows the 'Action Summary' tab selected in the top navigation bar. Below the navigation bar, there is a header 'H: Case narrative' highlighted with a red box. Below this, there is a list of case history items with columns for 'Time', 'Description', and 'Performed by'. The items are listed in chronological order from top to bottom. The first item is 'Agent/Service Level/Process/Event #444444 the case Concurrence and Referral (CNR-7486) Status changed to Pending-Council/Decision' at 26/02/19 2:58:02 PM. The second item is 'Agent/Service Level/Process/Event #444444 the case Concurrence and Referral (A-7627) Acknowledgement due for concurrence and referral request A-7627' at 26/02/19 2:58:02 PM. The third item is 'Elizabeth Chougala #444444 Payment (P-4442) New concurrence and referral request for SYDNEY TRAINS CNR-7486' at 14/02/19 10:00:00 AM. The fourth item is 'Elizabeth Chougala #444444 Payment (P-4442) Payment confirmation: NSW Government concurrence and referral re' at 14/02/19 10:00:00 AM. The fifth item is 'Elizabeth Chougala #444444 Payment (P-4442) Update: NSW Government concurrence and referral request CNR-7486' at 14/02/19 10:00:00 AM. The sixth item is 'Elizabeth Chougala #444444 Payment (P-4442) Elizabeth Chougala selected the case Concurrence and Referral (CNR-7486) Status changed to Pending-Agency/Review' at 14/02/19 10:00:00 AM.

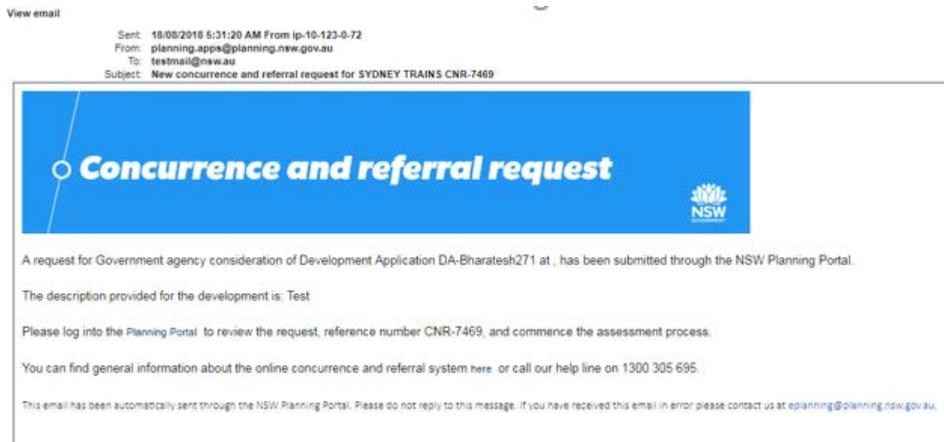
roll down to the “Case Narrative” section.

- iv. Double click on the email notification you wish to save. An email preview will open for you to view.

Introduction to the Agency Dashboard

Subtitle

May 2019



- v. Right click and save a html version of the email to your local drive to save into your agency repository. Alternatively, you can take a screenshot of the email and save the image if you require the email to be saved in a different format.
- i. **You can view case stages and quantity of open cases per case stage.**

Via your dashboard, you will be able to view:

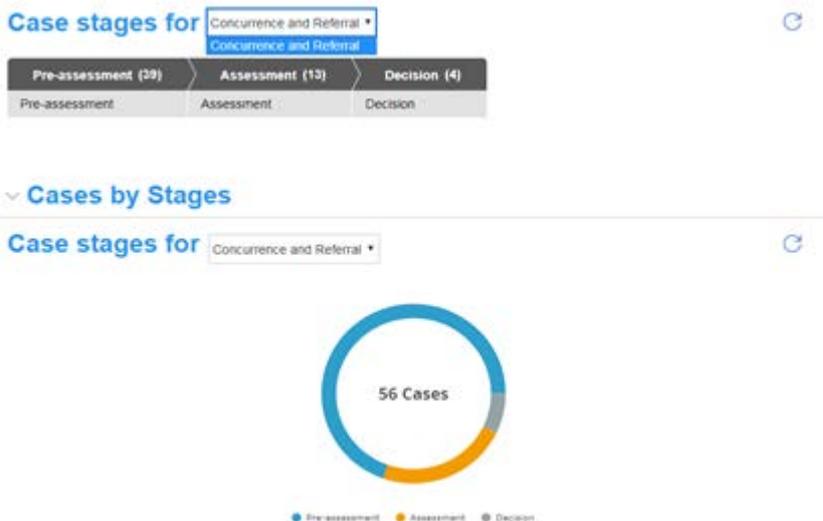
- o The number of jobs per case stage and per work type and;
- o A high-level donut chart visual.

Select the work type you wish to review by clicking the drop-down menu for both:

The number of jobs per case stage per work type and/or;

The high-level donut chart visual.

At this stage, work types agencies can select from the drop-down menu will be incoming concurrence and referral requests.



Introduction to the Agency Dashboard

Subtitle

May 2019

The above images will be generated. These are visual representations of current work stages of all jobs within the selected work type.

Please note: The chevron chart and donut chart display details of open cases. The term “*Decision*” refers to the case pending a decision rather than a decision having been made (this would be considered a closed case and would not appear on the chart).

Step 4: Agency Administration view

Upon log in, Agency Administration will view the below dashboard. Administration can add or modify Agency Users within the agency organisation.

+ Add or Modify Roles

Dashboard EP

	Title	Name	Position	Email	Last login
		CNR Admin Sydney Trains Agency		CNRAdminSydneyTrainsAgency@planning.nsw.gov.au	27/08/2018 3:08:27 PM

Please note: See *HowTo manage users in the concurrence and referral system* for a more detailed step-by-step guide.

Next Steps

The dashboard views allow respective Agency Users and Agency Administration to:

- Navigate and monitor all work types relevant to specific agency organisations
- Work on referred agency jobs and
- Perform administrative tasks

Users can access their dashboard at any stage as preferred.