

# Adding Users to a Service in a Workgroup

Administration - Organisational Management

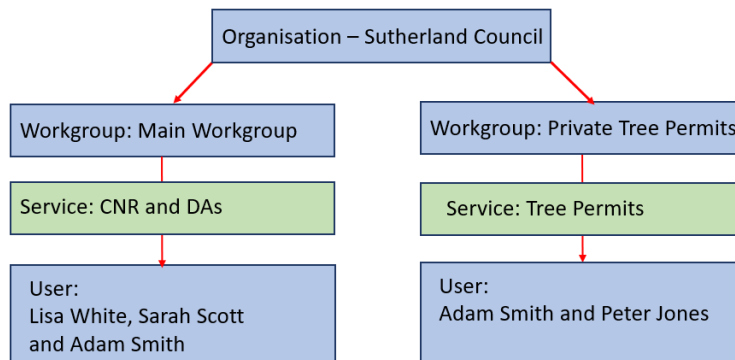


## Managing Workgroups

Within an Organisation there may be Workgroups containing Services performed within an area of the Organisation. Examples include staff who handle Tree Permits, DAs, or CDCs.

When adding Services to a Workgroup, the Administrator can also add users to a Service.

The following quick reference guide uses a specific scenario to walk you through the steps of adding a user to a service. In this scenario, a workgroup called Tree Permits has been created. Within that Workgroup a Service called Tree Permits has also been added. This guide shows you how an Administrator can add users to the Tree Permit Service in the Private tree Permits Workgroup.



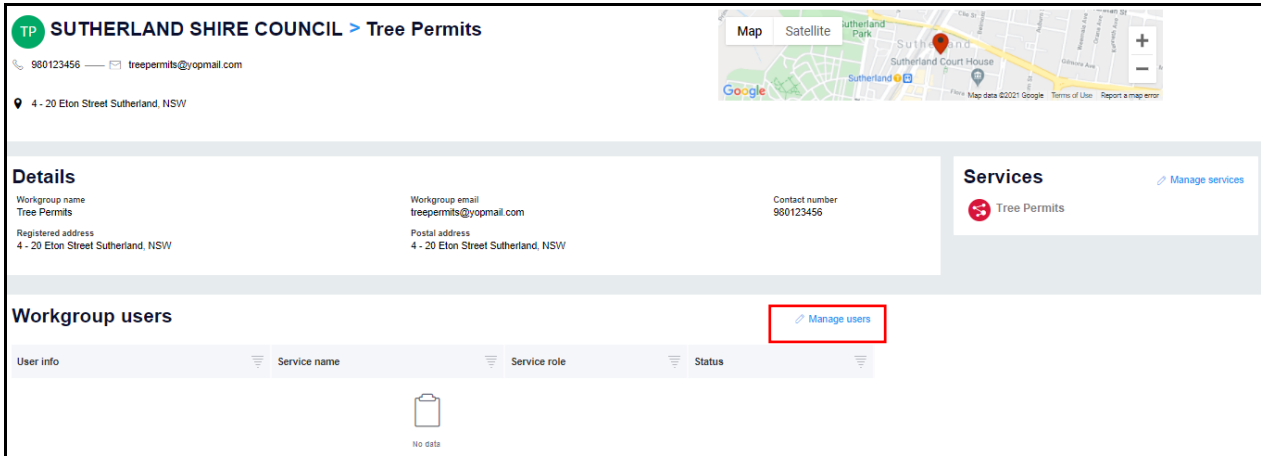
1. From the Workgroups section of the screen **select** the relevant workgroup, in this instance Tree Permits.

The screenshot shows the Sutherland Shire Council website. The 'Workgroups' section is visible, listing several workgroups with their locations. The 'Tree Permits' workgroup is highlighted with a red box. The location for 'Tree Permits' is listed as '4 - 20 Eton Street Sutherland, NSW'. A map of Sutherland is also visible in the background.

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2. Click the Manage Users link to add Users to the Service.



**TP SUTHERLAND SHIRE COUNCIL > Tree Permits**

980123456 — treepermits@yopmail.com

4 - 20 Eton Street Sutherland, NSW

**Details**

Workgroup name Tree Permits	Workgroup email treepermits@yopmail.com	Contact number 980123456
Registered address 4 - 20 Eton Street Sutherland, NSW	Postal address 4 - 20 Eton Street Sutherland, NSW	

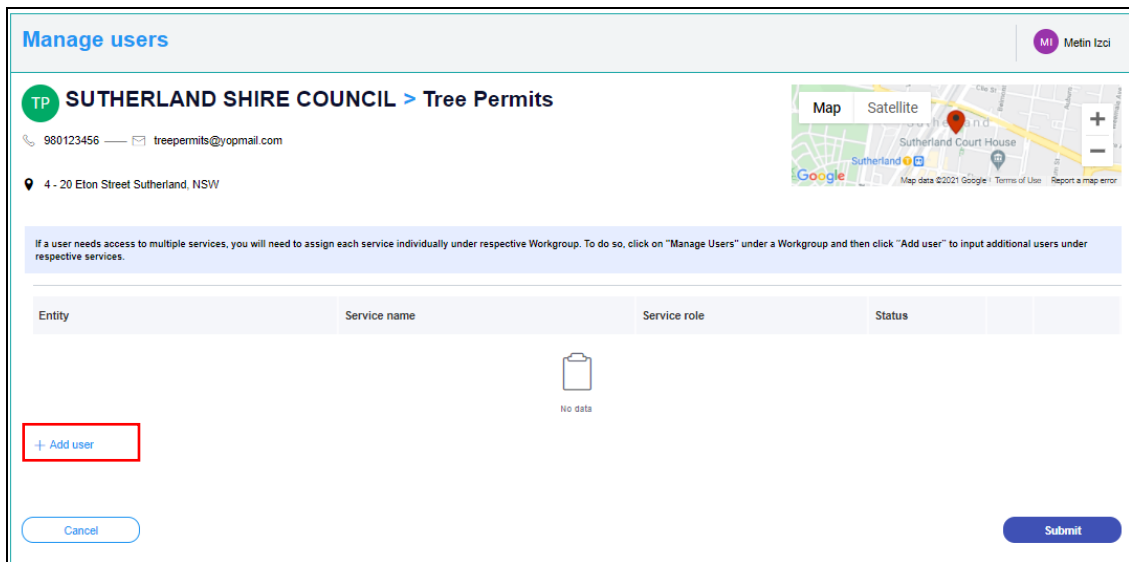
**Services** [Manage services](#)

- Tree Permits

**Workgroup users** [Manage users](#)

User info	Service name	Service role	Status
No data			

3. Click Add User to search for an employee.



**Manage users** MI Metin Izci

**TP SUTHERLAND SHIRE COUNCIL > Tree Permits**

980123456 — treepermits@yopmail.com

4 - 20 Eton Street Sutherland, NSW

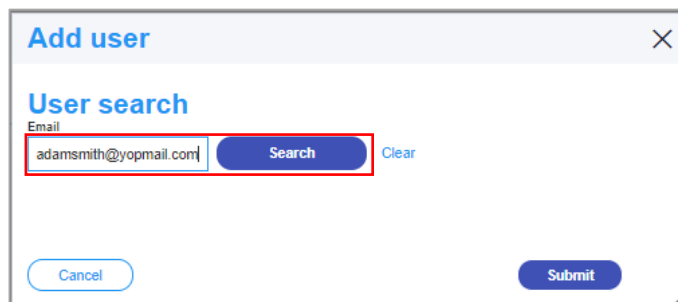
If a user needs access to multiple services, you will need to assign each service individually under respective Workgroup. To do so, click on "Manage Users" under a Workgroup and then click "Add user" to input additional users under respective services.

Entity	Service name	Service role	Status
No data			

[+ Add user](#)

[Cancel](#) [Submit](#)

4. Enter the full Email address for the employee and click Search.



**Add user** ✕

**User search**

Email

adamsmith@yopmail.com [Search](#) [Clear](#)

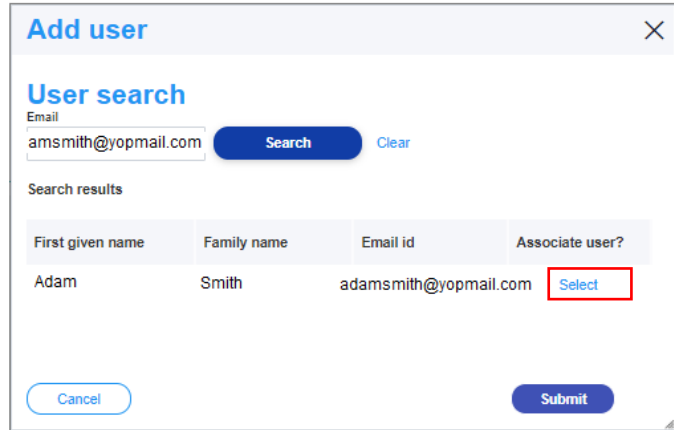
[Cancel](#) [Submit](#)

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5. Click Select to update the Associate user to Selected.

**Note:** if there is more than one user with the same name, ensure you click select for the correct one.

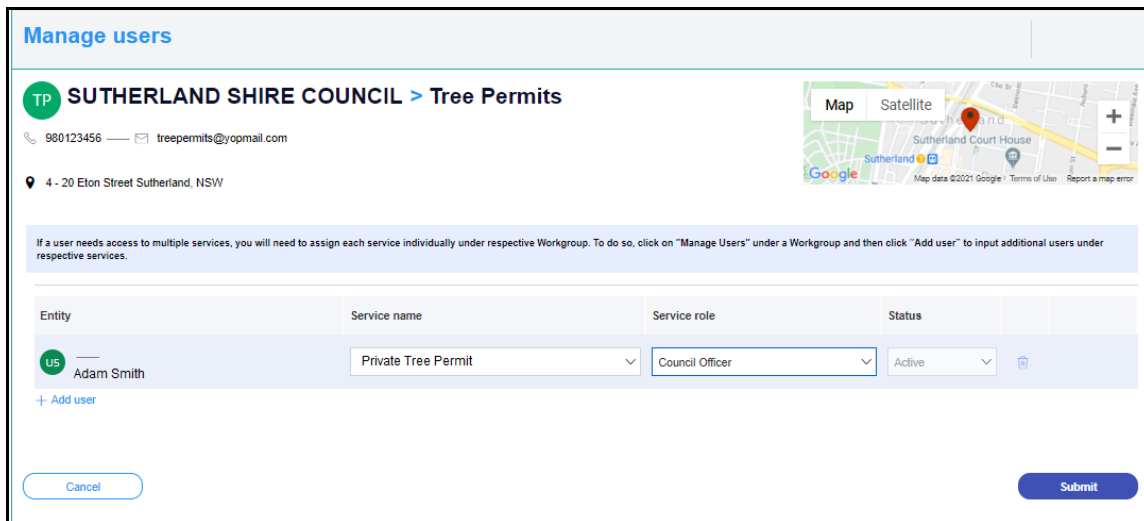


The 'Add user' dialog box contains a 'User search' section with an email input field containing 'amsmith@yopmail.com', a 'Search' button, and a 'Clear' link. Below is a 'Search results' table with columns for 'First given name', 'Family name', 'Email id', and 'Associate user?'. The first row shows 'Adam', 'Smith', 'adamsmith@yopmail.com', and a 'Select' button highlighted with a red box. At the bottom are 'Cancel' and 'Submit' buttons.

First given name	Family name	Email id	Associate user?
Adam	Smith	adamsmith@yopmail.com	Select

6. Click Submit to save the user details and continue.

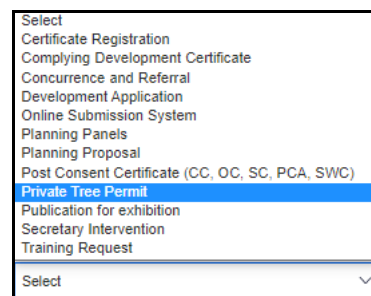
Submit



The 'Manage users' interface for 'SUTHERLAND SHIRE COUNCIL > Tree Permits' shows contact information (960123456, treepermits@yopmail.com) and an address (4 - 20 Eton Street Sutherland, NSW). A map shows the location. A table lists users with columns for Entity, Service name, Service role, and Status. The first user is Adam Smith, associated with 'Private Tree Permit', 'Council Officer', and 'Active' status. A '+ Add user' link is below the table. 'Cancel' and 'Submit' buttons are at the bottom.

Entity	Service name	Service role	Status
US Adam Smith	Private Tree Permit	Council Officer	Active

7. Click on the Service name drop-down and select the relevant Service from the available list – in this instance Private Tree Permit.



A dropdown menu showing a list of services. 'Private Tree Permit' is highlighted in blue. The list includes: Certificate Registration, Complying Development Certificate, Concurrence and Referral, Development Application, Online Submission System, Planning Panels, Planning Proposal, Post Consent Certificate (CC, OC, SC, PCA, SWC), Private Tree Permit, Publication for exhibition, Secretary Intervention, and Training Request.

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8. **Click** on the Service role drop-down and select the relevant role from the available list, in this instance Council Officer.

**Manage users**

**MW SUTHERLAND SHIRE COUNCIL > Main Workgroup**

business-10211@yopmail.com

<no address on record>

If a user needs access to multiple services, you will need to assign each service individually under respective Workgroup. To do so, click on "Manage Users" under a Workgroup and then click "Add user" to input additional users under respective services.

Entity	Service name	Service role	Status
adamsmith@yopmail.com	Select Certificate Registration Complying Development Certificate Concurrence and Referral Development Application Online Submission System Planning Panels Planning Proposal Post Consent Certificate (CC, OC, SC, PCA, SWC) Private Tree Permit Publication for exhibition Secretary Intervention Training Request	Select Select Council Officer	Active

**Submit**

**Note:** By default, the user status is set to active, however, this can be changed to Inactive if a user's role changes.

9. When you are happy with your selections, **click** Submit to save the details and continue.

**Submit**

**Note:** The following screen messages may display:

- User is already associated with the same service and role. Please choose a different association.

A red error message indicates that the user has already been associated with the service in a workgroup. A user may only be added once to each service.

Or...

You have successfully assigned a user to a service within a Workgroup of your organisation

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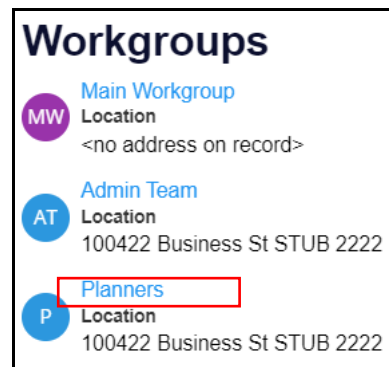


## Changing a User's Status from Active to Inactive

If a staff member leaves an organisation, or changes roles to another department, their access to services will need to be changed from Active to Inactive.

Before you change a user's status to Inactive, please reassign all their assigned cases to another user. A warning will display to alert you if any cases need to be reassigned.


1. On the Dashboard, **click** the Workgroup the staff member is currently subscribed to, for example Planners.



2. **Click** Manage Users – on the right-hand side of the screen.



3. Locate the user and **select** Inactive from the Status drop-down list.

Entity	Service name	Service role	Status
 gautam.gandha@capgemini.com	Planning Proposal	Council Officer	Active Active <b>Inactive</b>

4. **Click** Submit to update the user status from Active to Inactive.



**Note:** A green message will indicate you have been successful. A red error message will indicate there is something which needs fixing before continuing.

You have successfully assigned services to users within your organisation. Click "Close" to return to the dashboard.

- Before you can inactivate on Development Application, please re-assign all the cases assigned to on Development Application to another user.

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