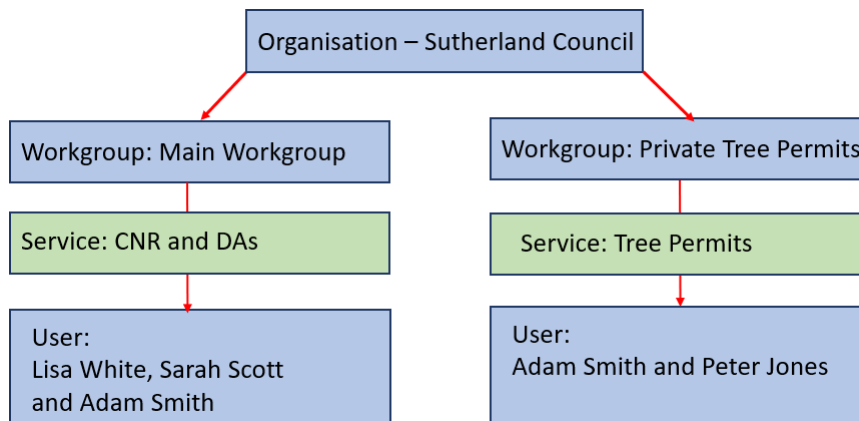


Managing Users in an Organisation

Within an Organisation, for example, a Council or an Agency, there should be at least one user assigned to the role of Organisation Administrator.

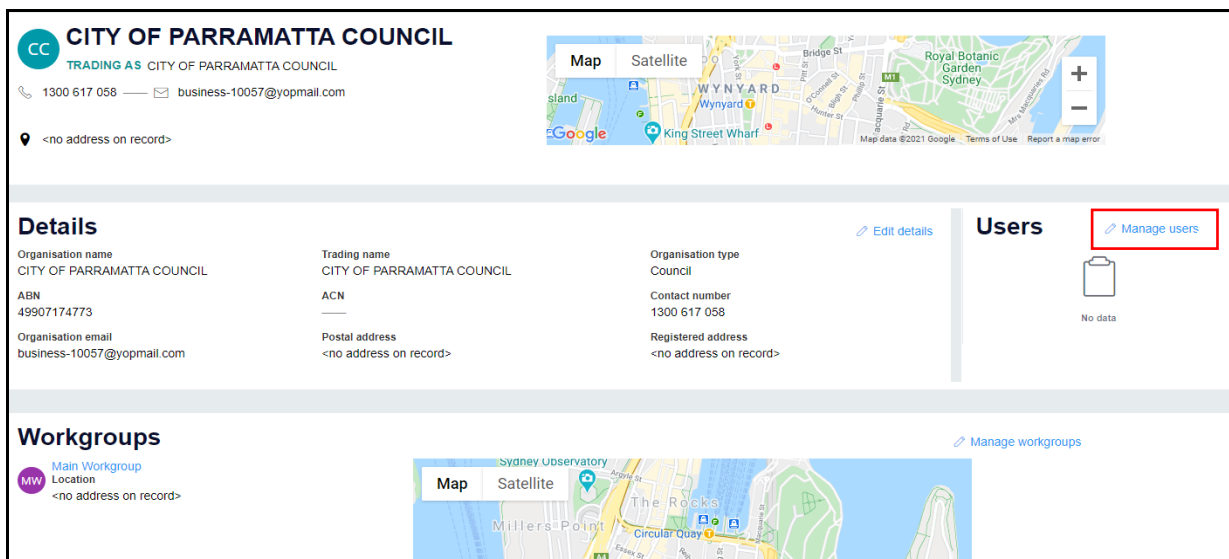
Administrators are able to assign Services to a Workgroup and Users to Services within the Workgroup of the Organisation.



Before a User is assigned to a role by an Administrator, the user must already exist in the NSW Planning Portal and have a working email address.

Adding Users

1. On the dashboard's Users section, **click** Manage Users.



The screenshot shows the City of Parramatta Council dashboard. The 'Users' section is active, and the 'Manage users' button is highlighted with a red box. The 'Details' section shows the following information:

Field	Value
Organisation name	CITY OF PARRAMATTA COUNCIL
Trading name	CITY OF PARRAMATTA COUNCIL
ABN	49907174773
ACN	
Organisation email	business-10057@yopmail.com
Postal address	<no address on record>
Organisation type	Council
Contact number	1300 617 058
Registered address	<no address on record>

The 'Workgroups' section shows the 'Main Workgroup' with a location of '<no address on record>'. The 'Users' section shows 'No data'.

Adding and Managing an Organisation's Users

Administration - Organisational Management

2. **Click** Add User to open the search screen.



Manage users

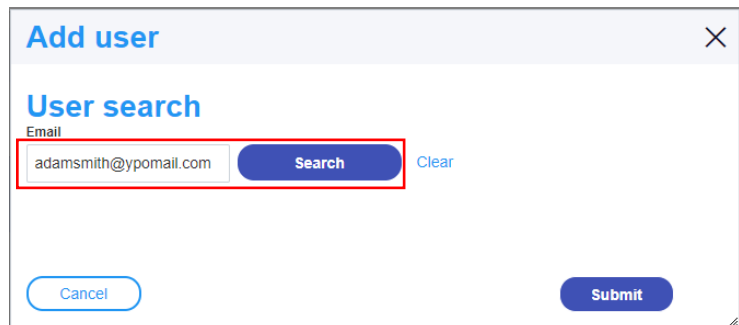
SUTHERLAND SHIRE COUNCIL
TRADING AS SUTHERLAND SHIRE COUNCIL
98065050 — business-10211@yopmail.com
10 FOOTBRIDGE BOULEVARD WENTWORTH POINT 2127

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
+ Add user			

Cancel Submit

3. **Enter** the user Email address in full and then click Search to locate the user.



Add user

User search

Email
adamsmith@ypomail.com Search Clear

Cancel Submit

4. **Click** Select to select the User from the list.

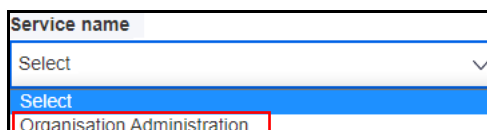


First given name	Family name	Email id	Associate user?
Adam Smith	1	adamsmith@ypomail.com	Select

5. **Click** Submit to continue.

Submit

6. Next, click the Service name drop-down and **select** the appropriate Service.



Service name

Select

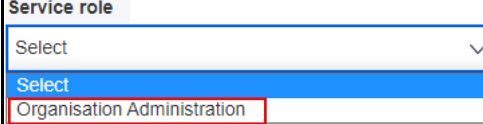
Select

Organisation Administration

Adding and Managing an Organisation's Users

Administration - Organisational Management

7. Click the Service role drop-down and **select** the appropriate option.




Service role

Select

Select

Organisation Administration

Note: By default, the User's Status will be Active.

Entity	Service name	Service role	Status
 adamsmith@yopmail.com Adam Smith	Organisation Administration	Organisation Administrator	Active

8. **Click** Submit to continue.

Submit

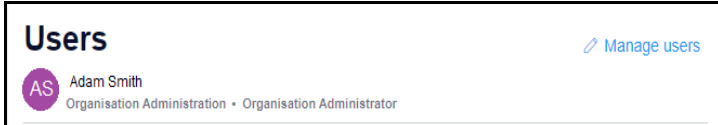
Note: The screen should display the following message:

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


9. **Click** Close to close the window and return to the dashboard.

Close

10. The new user should now have been successfully been added to the Users section of the screen.



Users [Manage users](#)

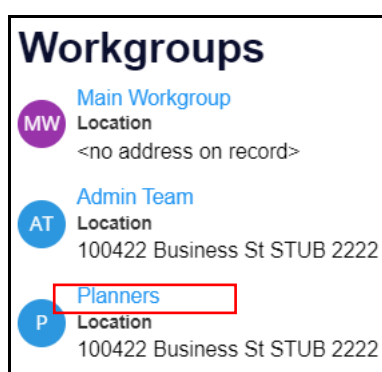
 Adam Smith
Organisation Administration • Organisation Administrator

Changing a User's Status from Active to Inactive

Users are by default added with the status of Active, however, if their role changes or they leave, their status can be changed 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.




Workgroups

- MW** Main Workgroup
Location
<no address on record>
- AT** Admin Team
Location
100422 Business St STUB 2222
- P** **Planners**
Location
100422 Business St STUB 2222

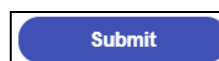
2. **Click** Manage Users – on the right-hand side of the screen.



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 Inactive

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.

Adding and Managing an Organisation's Users

Administration - Organisational Management

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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