

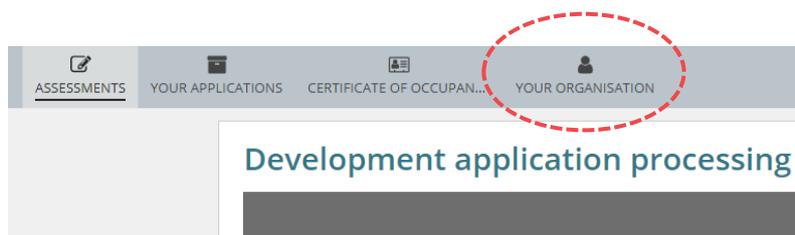
## Background

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The updating of a PlanSA user's contact and personal details can only be performed by the 'Organisation Administrator' for the organisation.

### How do I know if I am an Organisation Administrator?

An Organisation Administrator's dashboard ribbon will display the **Your Organisation** option.



### How can I update a staff member's username?

When changes are made to a staff member's first name and/or last name their 'Username' is not effected by the changes.

To change a username for a staff member their existing username will need to be 'deactivated' and a 'new' PlanSA user account created. The process to follow will vary depending on if it is a relevant authority (e.g. councils, Regional Assessment Panels (RAPs), accredited professionals), volume applicant, or referral body.

#### Relevant Authorities

1. Reassign user allocated applications to another user.
2. Send a request to the PlanSA Service Desk to deactivate and create a new PlanSA user account.
3. Reassign applications to the new user account.

#### Volume Applicant and Referral Body

1. Reassign user allocated applications to another user (referral body only).
2. Deactivate the user account.
3. Create a new PlanSA user account.
4. Reassign applications to the new user account (referral body only).

## Included Instructions

- [Update personal and contact details for a user](#)

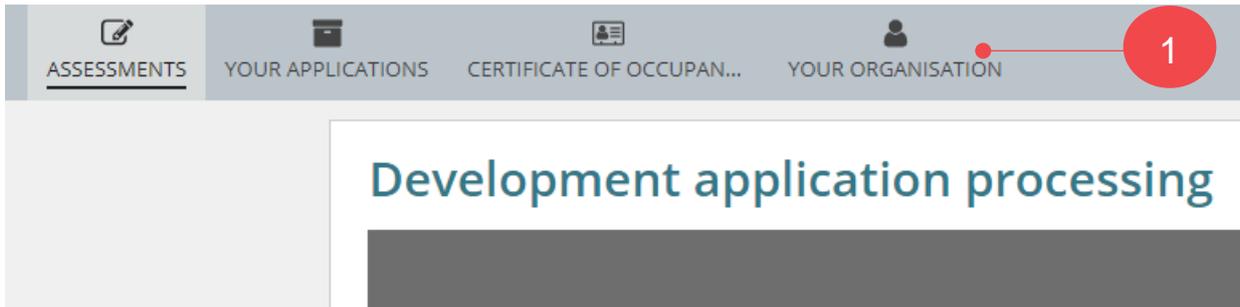
## Related Instructions

Available from the PlanSA Support Library – [Your Organisation Details, Conditions and Users](#) page.

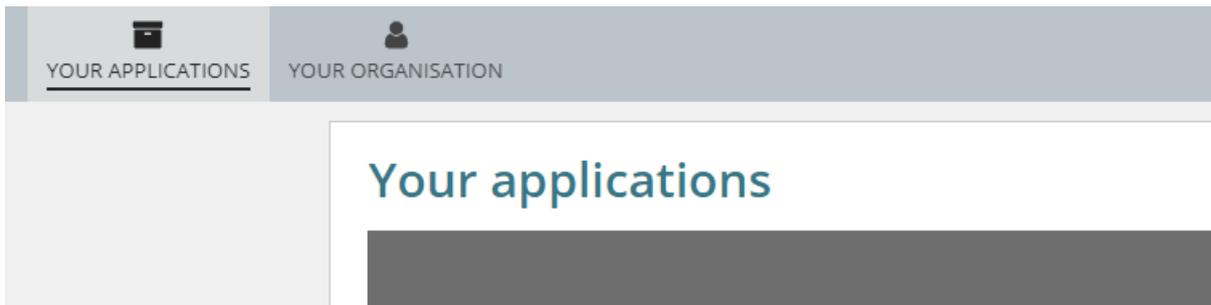
- How to – Create a new PlanSA-DAP user account
- How to – Update access to PlanSA-DAP for a user
- How to – Deactivate access to PlanSA-DAP for a user
- How to – Reactivate access to PlanSA-DAP for a user
- How to – Request deactivation of a PlanSA-DAP user
- How to – Request a new PlanSA-DAP user account

## Update personal and contact details for a user

1. Click on **Your Organisation**.

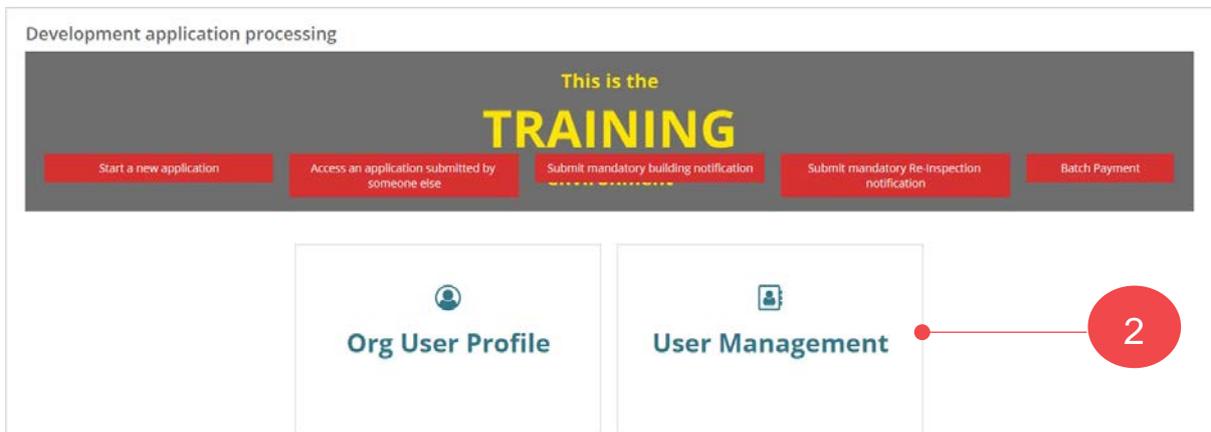


The dashboard image above is for a referral body. If you are an Organisation Administrator for a volume applicant (e.g. building developer, architect etc.) then the dashboard view will be as shown in the image below.



2. Click on **User Management**.

Noting, if viewing as an Organisation Administrator for a referral body and/or relevant authority, then an additional option – **Save Conditions and Notes** – is shown.



3. Search for the staff member's user account, either by their first name or surname.
4. Click on the **User Name** to view more details.

| User Name    | Position       | User type |
|--------------|----------------|-----------|
| penny.public | Administration | User      |

5. Update the **Edit User** fields with the new information provided by the staff member, e.g. change of first name, change of last name, organisation position or update contact phone number to a 1800, 1300 or similar.
6. Click on **Submit** to save the updates.

**Commissioner of Highways**  
penny.public

**DEACTIVATE USER**

**Title \***  
Miss

**First Name \***  
Penny  
35 characters maximum

**Last Name \***  
Jones  
35 characters maximum

**Email \***  
pennyjones@gmail.com  
50 characters maximum

**Phone Number \***  
1800 000 111

**Position at Commissioner of Highways**  
Administration  
100 characters maximum

**Roles and functions**

Organisation Administrator

Basic User

**CANCEL** **SUBMIT**

- 7. Expand the **Event History** to show more details.

The **Event History** will show a record of the change, including the date, time and the user who made the change.

- 8. Click on the **change record** to view more details.

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| User impacted | Action taken by        | Time of change   | Type change     |
|---------------|------------------------|------------------|-----------------|
| Penny Public  | CommsHighway RefAgency | 07/04/2021 08:46 | EDIT_USER       |
| Penny Public  | CommsHighway RefAgency | 06/04/2021 14:05 | EDIT_USER       |
| Penny Public  | CommsHighway RefAgency | 06/04/2021 14:00 | REACTIVATE_USER |
| Penny Public  | CommsHighway RefAgency | 06/04/2021 13:56 | DEACTIVATE_USER |
| Penny Public  | CommsHighway RefAgency | 06/04/2021 13:51 | CREATE_USER     |

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**Selected Event**

**Time**  
07/04/2021 08:46

**User**  
CommsHighway RefAgency

**Description**  
User: Penny Public. Org: Commissioner of Highways. Roles: DEFAULT.