

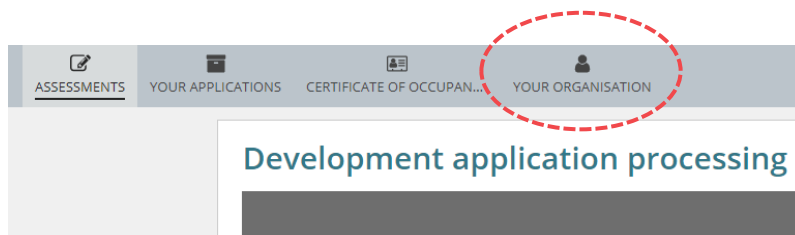
Background

1

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

2

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

Related Instructions

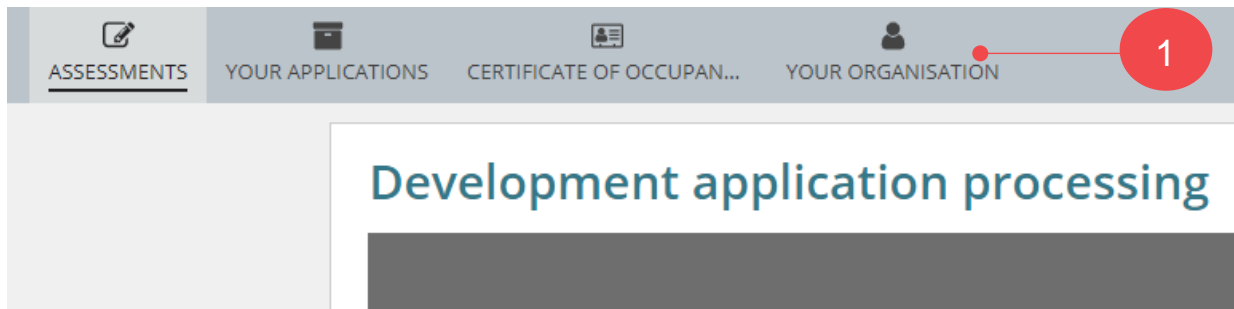
Available from the PlanSA Support Library – [Your Organisation Details, Conditions and Users](#) page.

- 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

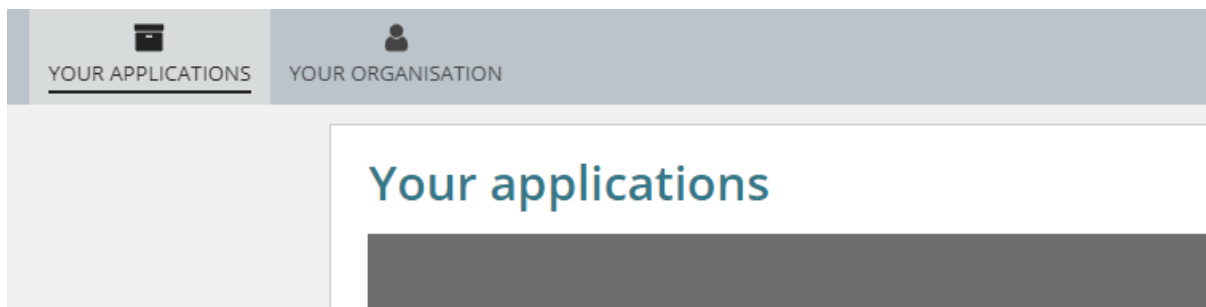
Update personal and contact details for a user

3

1. Click on **Your Organisation**.

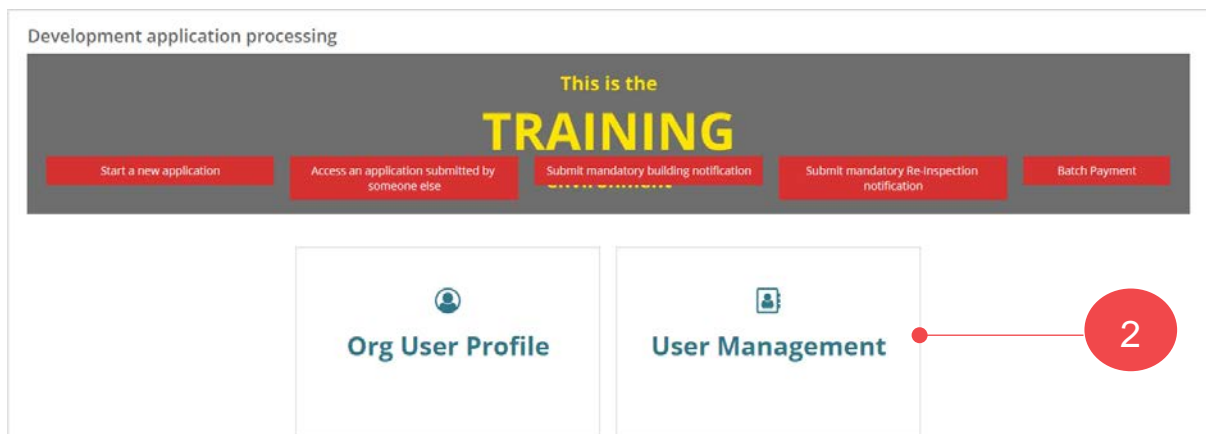


The dashboard image above is for a referral body. If you are an Organisation Administrator for a volume applicant (e.g. building developer, architect etc.) then the dashboard view will be as shown in the image below.



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.



Update personal and contact details for a PlanSA-DAP user



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.

4

Development Application Processing

Commissioner of Highways - Users

penn

3

User Name	Position	User type
penny.public	Administration	User

4

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.

Edit User

5

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

6

SUBMIT

How to...

Update personal and contact details for a PlanSA-DAP user



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

5

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.

Event History

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

<< < 1 - 5 of 17 > >>

Selected Event

Time

07/04/2021 08:46

User

CommsHighway RefAgency

Description

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