



PlanBuild Tasmania Process Guide

Organisation Administration

Content

This document is a guide into key processes that provides users with an understanding of how some key /inbuilt functionalities work within PlanBuild Application Services:

Edit organisation details:

- Name (e.g. Hobart City Council)
- Payment Account No. (account to receive payments from PBT to)
- ABN
- Reconciliation File Email (email to receive the disbursement file to)
- Logo
- Stamp Colour
- Mailing address (forms header of Permits etc)
- Phone (forms header of Permits etc)
- Email (forms header of Permits etc)
- Fee rates (inc. new fee rate groups (annually), edit current amounts, update ledger codes etc.)

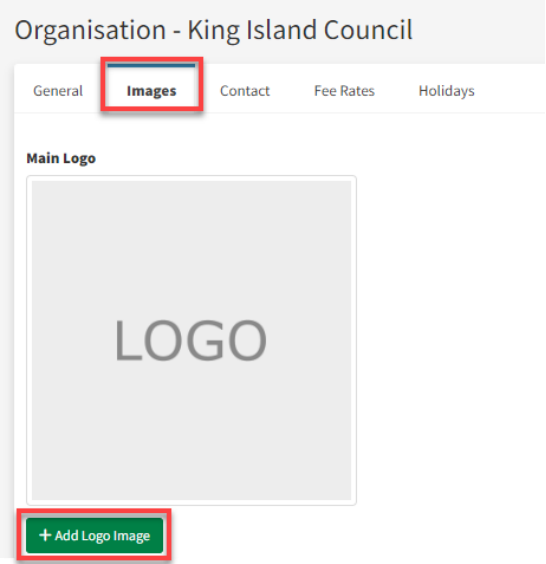
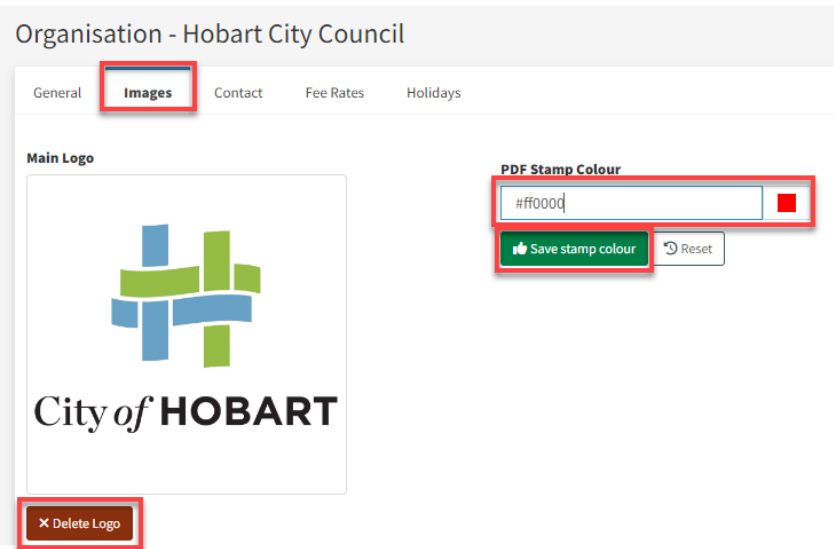
Manage users in the organisation;

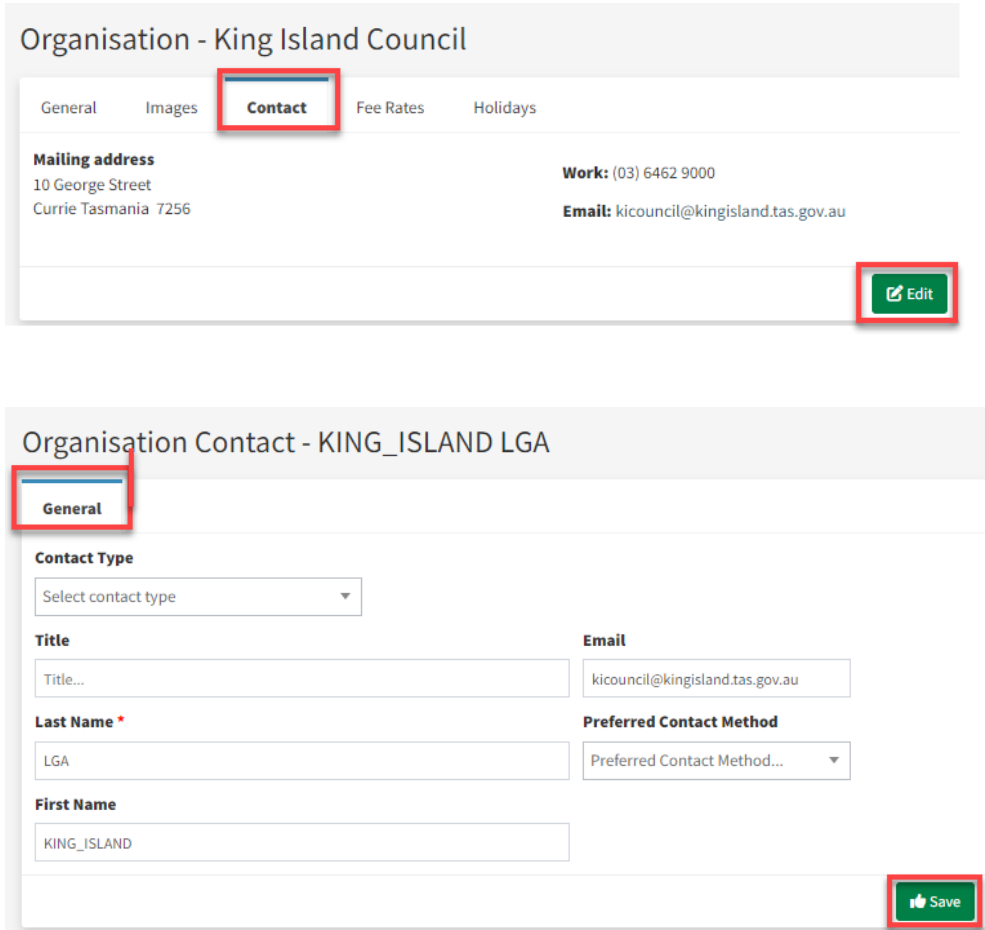
- Invite new users to the org
- Remove/unlink users from the org
- Add signatures, roles and departments to individual users

Manage organisation libraries;

- Edit a current library condition/RFI reason
- Add a new condition/RFI reason to the library
- Edit a current library referral reason
- Add a new referral reason to the library

Form Screen / Fields	Description														
Edit Organisation Details User Profile User Info Organisation Details Licensee DetailsSupport My Organisations Switch to your Organisation via the Organisation Switcher by clicking your user at the top right of the screen. If you are an administrator of your organisation you can navigate to the Organisation by clicking the relevant row below to navigate to that Organisation. To create a new organisation, select 'Create a new Organisation'. <i>Note: You must be logged in as an individual profile to create a new organisation (you cannot create whilst logged in under your organisation profile).</i> Showing 1 to 1 of 1 entries Previous1Next <table><thead><tr><th>Name</th><th>Type</th><th>ABN</th><th>Roles</th><th>Default</th><th>Status</th><th></th></tr></thead><tbody><tr><td>King Island Council</td><td>Agency</td><td>47 537 189 282</td><td> Organisation Reporting Signatory Assessing Officer Admin Officer Organisation System Admin </td><td>✓</td><td>Active</td><td> </td></tr></tbody></table> Organisation - King Island Council General ImagesContactFee RatesHolidays Primary Organisation Classification * Primary Organisation Classification... Name * King Island Council ABN 47 537 189 282 Reconciliation File Email Reconciliation File Email... Reference No. code KIC ABS Reference No. ABS Reference No.... Save	Name	Type	ABN	Roles	Default	Status		King Island Council	Agency	47 537 189 282	Organisation Reporting Signatory Assessing Officer Admin Officer Organisation System Admin	✓	Active		A user that has been assigned the ‘Organisation System Admin’ role within their organisation can edit their organisations profile. This role should only be given to a limited number of users as they have control to change financial details. The edit screen can be accessed by the user viewing their ‘profile’ and switching to the ‘Organisation Details’ tab and selecting the relevant organisation. Any user in the organisation can see this screen, those with the ‘Organisation System Admin’ role can click on the organisation to open and edit details. By clicking on the ‘General’ tab the user can update: • Name (e.g. King Island Council) • Payment Account No. (account to receive payments from PBT to) • ABN • Reconciliation File Email (email to receive the disbursement file to) • Reference No. Code • ABS reference number each council Once the updates have been made to the relevant fields, these can be saved by clicking the 'Save' button at the bottom of the tab.
Name	Type	ABN	Roles	Default	Status										
King Island Council	Agency	47 537 189 282	Organisation Reporting Signatory Assessing Officer Admin Officer Organisation System Admin	✓	Active										

Form Screen / Fields	Description
 	If the organisation logo needs to be added, updated or removed, this can be done by clicking on the 'Images' tab. To add a logo, click on the 'ADD Logo Image' button. A pop-up window will appear where you can drag and drop a logo or you can click on the upload section and select the relevant file. If a logo already exists, delete the existing logo and upload the new logo. Once the logo has been added, the user can set the PDF Stamp Colour by typing the code in the text box or clicking on the colour icon to search for the relevant colour. This can be set specific to the Organisations style guide. Once the stamp colour has been set the user can confirm the selection by clicking on the 'Save stamp colour' button.

Form Screen / Fields	Description
 Organisation - King Island Council General Images Contact Fee Rates Holidays Mailing address 10 George Street Currie Tasmania 7256 Work: (03) 6462 9000 Email: kicouncil@kingisland.tas.gov.au Edit Organisation Contact - KING_ISLAND LGA General Contact Type Select contact type ▼ Title Title... Email kicouncil@kingisland.tas.gov.au Last Name * LGA Preferred Contact Method Preferred Contact Method... ▼ First Name KING_ISLAND Save	The users can remove an existing logo by clicking on the 'Delete logo' button at the bottom of the tab. In the 'Contact' tab, to update the organisations contact details, click on the 'edit' button at the bottom of the tab. A new window will pop-up where the user can edit the contact types and add or edit: • Title • Name • Email (forms header of Permits) • Preferred contact method • Mailing address • Phone Once any relevant changes have been made, click on the green 'Save' button.

Form Screen / Fields	Description																
Addresses Showing 1 to 1 of 1 entries Show 25 Previous 1 Next <table><tr><th>Type</th><th>Street</th><th>Suburb</th><th>State / Territory</th><th>Postcode</th><th>Country</th><th>Retired</th><th></th></tr><tr><td>Mailing</td><td>10 George Street</td><td>Currie</td><td>Tasmania</td><td>7256</td><td>Australia</td><td></td><td> </td></tr></table> ☐ Show Retired + Add Edit Address Address Type * Mailing Street * 16 Elizabeth Street Suburb * Hobart State / Territory * Tasmania Postcode * 7001 Country * Australia Save Cancel	Type	Street	Suburb	State / Territory	Postcode	Country	Retired		Mailing	10 George Street	Currie	Tasmania	7256	Australia			To add a new address click on the ‘Add’ button. A pop-up will appear where the user can fill in the relevant details. To edit an existing address details click on the icon. To delete an existing address, click on the rubbish bin icon. Once you click on the to edit the address, a new pop-up will appear. Once the relevant details have been updated, click on the ‘Save’ button to apply the changes.
Type	Street	Suburb	State / Territory	Postcode	Country	Retired											
Mailing	10 George Street	Currie	Tasmania	7256	Australia												

Form Screen / Fields

Description

Phone Numbers

Showing 1 to 1 of 1 entries

Show 25 ▼

Previous 1 Next

Type	Phone	Retired	
Work	(03) 6462 9000		 

☐ Show Retired Add

LGA

Edit Phone

Phone Type *

Work

Phone *

(03) 6462 9000

Save

Cancel

Home

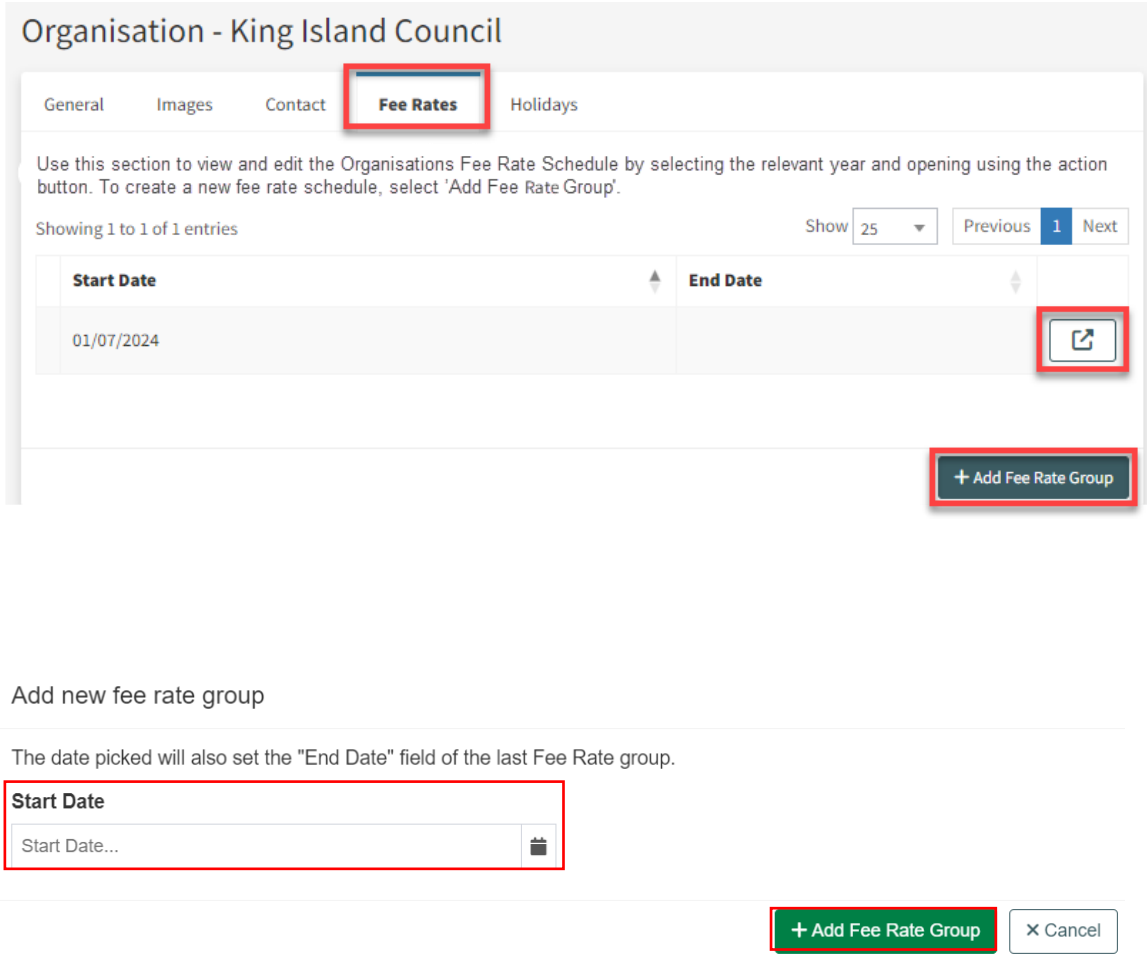
Mobile

Work

To edit the phone number click on the  icon.
To delete click on the rubbish bin icon.

Once you click on the  to edit the address, a new pop-up will appear.

Once the relevant details have been updated, click on the 'Save' button to apply the changes.

Form Screen / Fields	Description				
 Organisation - King Island Council General Images Contact Fee Rates Holidays Use this section to view and edit the Organisations Fee Rate Schedule by selecting the relevant year and opening using the action button. To create a new fee rate schedule, select 'Add Fee Rate Group'. Showing 1 to 1 of 1 entries <table border="1"> <thead> <tr> <th>Start Date</th> <th>End Date</th> </tr> </thead> <tbody> <tr> <td>01/07/2024</td> <td></td> </tr> </tbody> </table> + Add Fee Rate Group Add new fee rate group The date picked will also set the "End Date" field of the last Fee Rate group. Start Date Start Date... + Add Fee Rate Group X Cancel	Start Date	End Date	01/07/2024		Organisations can include their fee rate schedule for the relevant year and any future years. Using the 'Fee Rates' tab, users can add new fee rate groups (annually) and have the ability to edit the base and unit rates, add ledger codes and nominate if GST applies. To create a new fee rate schedule, users can select 'Add Fee Rate Group' A pop-up window will appear. Enter the start date and select the 'Add fee Rate Group' button. <i>Note that if there is an existing Fee Rate Group, the start date of the new fee rate group will be the end date of the current fee date group.</i>
Start Date	End Date				
01/07/2024					

Form Screen / Fields

Organisation - King Island Council

General

Images

Contact

Fee Rates

Holidays

Use this section to view and edit the Organisations Fee Rate Schedule by selecting the relevant year and opening using the action button. To create a new fee rate schedule, select 'Add Fee Rate Group'.

Showing 1 to 1 of 1 entries

Show

25

Previous

1

Next

Start Date	End Date
01/07/2024	

+ Add Fee Rate Group

Showing 1 to 25 of 112 entries

Show

25

Previous

1

2

3

4

5

Next

Name	Base Rate	Max Rate	Unit Rate	Rate per Unit	Ledger Code	Includes GST?
Advertising (Discretionary Planning Application)	-	-	-	per unit		No

Description

Users can edit and/or add in the rate amounts and ledger codes by clicking on the button.

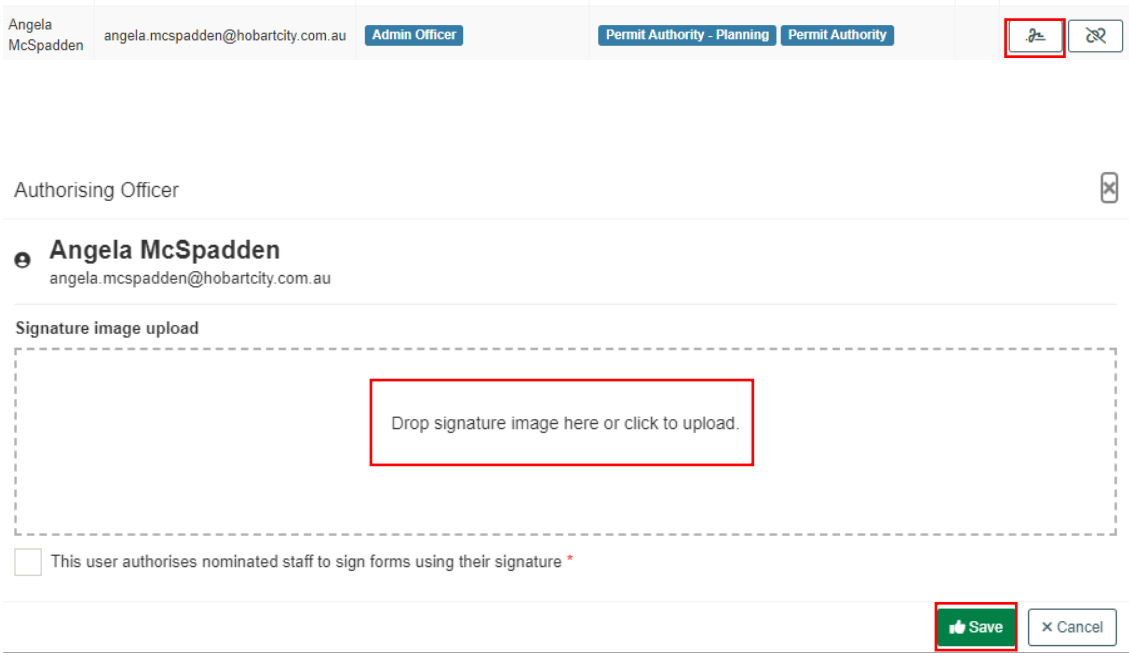
A pop-up window will appear where users can edit any existing rates by clicking on relevant field in the relevant line item.

Once all edits have been made, click 'close' at the bottom of the pop-up window.

Ledger codes should be entered as this allows organisations to reconcile fees paid across different departments for example Planning and or Building / Plumbing.

If GST applies to a fee ensure that the Include GST column is changed to Yes.

Form Screen / Fields	Description																																							
Manage Users in the Organisation Active Members Pending Invites This list shows all Active Members within your Organisation. To invite a new person to your Organisation, go to the Pending Invites tab and select the 'Invite' button. To edit a User's Role or Department, select the user and select the required roles and Departments for that user. Showing 1 to 113 of 113 entries <table><thead><tr><th>Name</th><th>Email</th><th>Roles</th><th>Departments</th><th>Job Title</th></tr></thead><tbody><tr><td></td><td>@hobartcity.com.au</td><td> Viewer Signatory </td><td> Permit Authority </td><td> </td></tr><tr><td></td><td>@hobartcity.com.au</td><td> Organisation Project Create Admin Officer Assessing Officer Application Notification Work Admin </td><td> Permit Authority Permit Authority - Strata Plan </td><td> </td></tr><tr><td></td><td>@hobartcity.com.au</td><td> Viewer </td><td> Permit Authority </td><td> </td></tr></tbody></table> Active Members Pending Invites This list shows people that have been invited to join your Organisation. To invite others to join your Organisation, select the Invite Button. Showing 0 to 0 of 0 entries Show 25 Previous Next <table><thead><tr><th>Email</th><th>Roles</th><th>Job Title</th><th>Invited</th><th>Status</th></tr></thead><tbody><tr><td colspan="5">No Invites found</td></tr></tbody></table> <table><thead><tr><th>Name</th><th>Email</th><th></th></tr></thead><tbody><tr><td> Karen Abey</td><td>abeyk@hobartcity.com.au</td><td> </td></tr><tr><td> Mark Anderson</td><td>andersonm@hobartcity.com.au</td><td> </td></tr></tbody></table>	Name	Email	Roles	Departments	Job Title		@hobartcity.com.au	Viewer Signatory	Permit Authority			@hobartcity.com.au	Organisation Project Create Admin Officer Assessing Officer Application Notification Work Admin	Permit Authority Permit Authority - Strata Plan			@hobartcity.com.au	Viewer	Permit Authority		Email	Roles	Job Title	Invited	Status	No Invites found					Name	Email		Karen Abey	abeyk@hobartcity.com.au		Mark Anderson	andersonm@hobartcity.com.au		Users can be invited and managed by any user with the ‘Organisation System Admin’ role. Any user in the organisation can see this screen, those with the ‘Organisation System Admin’ role can click on the organisation to open and edit details. The ‘Active Members’ section shows any users currently in the organisation. You can retire a user by selecting the ‘unlink’ action button . The ‘Pending Invites’ tab can be used to invite a user to an organisation or see requests which are yet to be accepted (from here you can cancel or re-send the invitation). Invites not accepted will expire after 7 days. When inviting a new user to an organisation, the user must first register for an individual account. An invitation can then be sent to the email address used to register. You can set the new users ‘Roles’ and ‘Departments’ (each role explained below) when sending the invitation, or these can be added/edited at any time. If a user leaves the organisation they will need to be ‘retired’ from the organisation. This will ensure that they no longer have access to the organisation. In the 'Active Members' section, users can remove the link to the organisation at any time by clicking on the ‘retire link/unlink’ button .
Name	Email	Roles	Departments	Job Title																																				
	@hobartcity.com.au	Viewer Signatory	Permit Authority																																					
	@hobartcity.com.au	Organisation Project Create Admin Officer Assessing Officer Application Notification Work Admin	Permit Authority Permit Authority - Strata Plan																																					
	@hobartcity.com.au	Viewer	Permit Authority																																					
Email	Roles	Job Title	Invited	Status																																				
No Invites found																																								
Name	Email																																							
Karen Abey	abeyk@hobartcity.com.au																																							
Mark Anderson	andersonm@hobartcity.com.au																																							

Form Screen / Fields	Description
 Angela McSpadden angela.mcspadden@hobartcity.com.au Admin Officer Permit Authority - Planning Permit Authority Authorising Officer Angela McSpadden angela.mcspadden@hobartcity.com.au Signature image upload Drop signature image here or click to upload. ☐ This user authorises nominated staff to sign forms using their signature * Save Cancel	Signatures can be added from the organisation admin screen. If someone has a signature uploaded against their user profile for the organisation they will be able to sign, approve and issue determinations. The 'Signatory Delegate' role can be given to users who are authorised to apply the signature of the Authority. Note that if a 'Signatory' gives approval for their signature to be used by Signatory Delegates, any user in the organisation who is assigned the 'Signatory Delegate' role will be able to use it (i.e. you will not be able to nominate which individual user can use your signature). To add a signature to a user, click on the 'make authorising officer' button. A pop up window will appear where you can drag and drop a signature or you can click on the upload section and select the relevant file. Tick the box at the bottom of the pop up window if the user authorises nominated staff to sign forms using their signature

Form Screen / Fields

Active Members

Pending Invites

This list shows all Active Members within your Organisation.

To invite a new person to your Organisation, go to the Pending Invites tab and select the 'Invite' button.

To edit a User's Role or Department, select the user and select the required roles and Departments for that user.

Showing 1 to 25 of 179 entries

Show 25

Previous

1

2

3

4

5

...

8

Next

Name	Email	Roles	Departments	Job Title
Karen Abey	abeyk@hobartcity.com.au	Organisation Project Create Organisation Reporting Compliance Officer Signatory Delegate Signatory Admin Officer Assessing Officer Work Admin		

 Permit Authority - Plumbing Permit Authority - Environmental Health Authority Permit Authority - Heritage Permit Authority Permit Authority - Planning Permit Authority - Building |

 || Mark Anderson | andersonm@hobartcity.com.au | Work Admin Admin Officer Signatory Assessing Officer |

 Permit Authority - Strata Plan Permit Authority | Description Users can be assigned 'Roles and Departments which will determine what types of tasks can be claimed and will determine the sub project types that will appear in the 'Organisation Tasks' section To add a role or department to a user, in the active members section of your organisation, select the user and click in either the role or department section and add in the required role. |

Manage Organisation Libraries

Conditions Library ?

[+ Add Library Condition](#)

To add a new item to the library, select the 'Add Library Condition' button.

Once added this will be available for users in the Organisation to select when adding conditions to an output.

To edit or remove an existing condition, select the relevant condition and edit/remove accordingly.

Showing 1 to 2 of 2 entries

Show

10

Previous

1

Next

Code	Description	Condition	Origin	Condition Category	
BPAFi 1	Bushfire Prone Area Code	Documentation from an accredited Bushfire Hazard Practitioner (with the relevant scope of work accreditation) demonstrating that the proposed development will comply with all relevant provisions of the Bushfire-Prone Areas Code of the Hobart Interim Planning Scheme 2015.	LUPAA 1993	RFI	 
S10	Special Plumbing Condition - S10	The owner will be responsible for the ultimate disposal of the stormwater to a common drain when available, as directed by the Hobart City Council.	Building Act 2016, Building Regulations 2016 and the National Construction Code	Condition	 

The condition and referral library can be managed from the organisation admin screen.

Users can add a new item to the library or edit existing conditions.

To edit an existing condition, select the relevant condition and edit by clicking on the pencil icon. The condition details will appear in a pop-up window

Conditions can be removed by clicking on the rubbing bin icon.

To add a new condition to the library select the 'Add Library Condition' button.

Add Library Condition

Code *

Code...

Condition Category *Sub Project Type

Condition Category...Sub Project Type...

Description *

Description...

Condition *

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|

* Press the Escape key to exit edit mode

Origin

Origin...

👍 Save Condition

✕ Cancel

A pop-up window will appear where the user can enter the details of the condition, including the condition category (RFI or Condition), the relevant code and the sub-project type the condition is relevant to i.e. planning, building, plumbing, TasWater etc.

Once the condition has been saved and added this will be available for users in the Organisation to select when adding conditions to an output.

Referral Library ?
+ Add Library Referral

To add a new item to the library, select the 'Add Library Referral' button.

Once added this will be available for users in the Organisation to select when creating a referral.

Showing 1 to 6 of 6 entries

Show 10
Previous 1 Next

Code	Description	Referral Reason
PLN	DA Ready to Advertise	Hi Admin This DA is ready to advertise. I have prepared and trimmed the advertising map and instructions. Please print it and include it as part of the documents for Eil. Thanks, INSERT YOUR NAME

Add Library Referral Reason

Code *

Description *

Referral *

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Save Referral Reason
Cancel

A User can submit a referral using one of the nominated 'Referral Reasons' from a library.

To remove an existing condition, select the relevant condition and click on the rubbish bin button.

To edit an existing item in the Referral Library, click on the pencil icon.

A new window will appear where the user can modify the item details as required.

To add a new item to the library, select the 'Add Library Referral' button.

A new window will appear where the user can enter the details of the library item. Once the condition has been saved and added this will be available for users in the Organisation to select when adding conditions to an output.