

TSW ONLINE GUIDE

ADMINISTRATOR OF ORGANISATION

CONTENTS

Introduction.....	1
Related documents.....	1
1. Applying to be an Organisation Administrator.....	1
2. Managing Organisation links.....	2
3. Managing Organisation Details.....	3
4. Ceasing to be an Organisation Administrator	5

INTRODUCTION

This guide is designed to help Trade Single Window (TSW) online users apply for and use the organisation administrator permission in TSW. Organisation administrators manage link requests and maintain details captured in Trade Single Window for their organisation.

RELATED DOCUMENTS

- Registration of Supplier and Client Codes Guide
- Administrator of Organisation Fact Sheet
- Registering to use TSW Fact Sheet

1. APPLYING TO BE AN ORGANISATION ADMINISTRATOR

Before you can apply to be an organisation administrator, you and your organisation must both be registered in TSW.

- If you are not already a TSW user, refer to Registering to use TSW Fact Sheet.
- To register the organisation, refer to Registration of Supplier and Client Codes Guide.

Once you meet these requirements you will then need to submit a request to be linked to your organisation.

Request Organisation Administrator Link & Permissions:

To request to be an administrator for your organisation, you will need to submit a request for a new organisation link and organisation administrator permissions.

-
- | | |
|---|---|
| 1 | Go to TSW home page and scroll down to Organisation Links |
| 2 | click Add Organisation Link |
-

- 3 enter the TSW registration number of the organisation you will be working on behalf of and click **Get Details**; the name of the organisation will appear: check it is correct.
- 4 click **Continue** and select the lodgement and/or registration permissions you need. Ensure you have answered **Yes** to **Do you wish to be the administrator of an organisation?**
- 5 **If you are the first administrator of your organisation: Attach** a company link approval document/letter authorising the requestor to be the organisation administrator
 - The letter should be on organisation letterhead and signed by an authorised person within the company such as a director, owner, partner, CEO or CFO.
 - The letter should also include the organisation client code or registration number
 If you are not the first administrator, you do not need to attach anything.
- 6 click **Submit**
your application will be submitted to your existing organisation administrator or, if there is no administrator, to Customs for processing.

2. MANAGING ORGANISATION LINKS

Any link requests from users wanting to do work on the organisations behalf will be emailed to the organisation administrator to approve or decline. The organisation administrator is also expected to maintain and remove user links to their organisation as appropriate i.e. when an employee leaves the company.

Process a link request:

- 1 Go to **TSW** home page, scroll down to **Organisation Links** and locate the link to the organisation you are the organisation administrator for.
- 2 Click on the hyperlink to the organisation registration to view the organisation dashboard.
- 3 scroll down to **Organisation Link Requests** and check the permissions;
! note: you may need to edit the permissions as it defaults to giving the user Administer Organisation and if the user is not an employee you don't want this to happen!. E.g.:

Organisation Link Requests

Date Requested	TSW Registration Number	Name	Permissions
15/09/2016	3863962	Demo Declarant	Manage Outward Cargo Report, Manage Import Declaration, Manage Excise Declaration, Manage Cargo Report Export, Manage Advance Notice of Departure, Manage Organisation, Administer Organisation, Manage Premises, Manage Export Declaration, Manage Inward Cargo Report, Manage Advance Notice of Arrival, Manage Person

Range: 1-1 Total: 1

Page 1

Rows 5

To:

- **approve** all permissions: click  and **Approve**

- **edit** the permissions before approving: click : this will take you to the permissions page, edit the permissions then click **Approve**
- **decline** all the permissions (and as a result, the link): click **Decline**

4 the user will be notified by email of the permissions approved (not any edits you have made).

Editing and removing user links:

You can edit a user's permissions or completely delete the link, for example if an employee leaves. To edit:

- 1 Go to **TSW** home page, scroll down to **Organisation Links** and locate the link to the organisation you are the organisation administrator for.
- 2 Click on the hyperlink to the organisation registration to view the organisation dashboard.
- 3 Scroll down to **Linked Users**, then to:
 - Add or remove permissions click  this will take you to the permissions page.
 - Remove the user link completely 
- 4 The user will be notified of your action by email.

3. MANAGING ORGANISATION DETAILS

Organisation administrators are responsible for maintaining their organisation's details in TSW. Administrators are able to edit the organisation's registration to:

- Update the organisation details
- Manage the organisations client types (add, update or inactivate)
- Manage organisation lodgement and/or registration privileges.

Edit Organisation:

- 1 Go to **TSW** home page, scroll down to **Organisation Links** and locate the link to the organisation you are the organisation administrator for.
- 2 Click on the hyperlink to the organisation registration to view the organisation dashboard.
- 3 Click **Edit this Organisation** and make the changes to the registration as required:
 - Edit details in the Organisation Details page
 - Edit Client Type(s) – click  in the Client Type page:

Existing Client Types

Client Code	Client Type	Expiry Date	Status
40474856E	Importer/Exporter	Not due to expire	Active 

- 4 Edit Lodgement Notifications in the Client Type page (if required).
 - For **B2B Messaging** (see image next page):

Click B2B Messaging
Select Lodgement Type
Highlight required Lodgement Statuses and click Add », then click +Add below
Repeat for additional Lodgement Types.

Email tswusersupport@customs.govt.nz so the process can be completed.

Lodgement Notifications

Preferred Method of Notification

Email	B2B Messaging	Do not notify
-------	----------------------	---------------

Start Date dd/mm/yyyy	End Date dd/mm/yyyy	
Lodgement Type (required) Import Declaration		
Lodgement Status (required)		
Available Lodgement Statuses	Selected Lodgement Statuses	
Cancelled Cleared Directions Given Directions Given Final Error	Add » « Remove Clear All	
Clear + Add		
Start Date	End Date	Lodgement Type

- For **Email**:
Click Email
Complete Recipient Name and Email Address
Select Lodgement Type
Highlight required Lodgement Statuses and click Add », then click +Add below
Repeat for additional Lodgement Types.

4 Click **Continue** and review the changes.

5 Tick the declaration, type a reason for the update and click **Submit**. Your application will be submitted to a Customs Officer for processing.

4. CEASING TO BE AN ORGANISATION ADMINISTRATOR

You can stop being an Organisation Administrator by either:

- Editing the organisation link and removing the Administrator of Organisation permission.
- Deleting the organisation link with the Administrator of Organisation permission.

Edit Your Permissions:

-
- 1 On your **TSW** home page scroll down to **Organisation Links**

 - 2 click  to edit the permissions page

 - 3 make the changes to your lodgement and/or registration permissions

 - 4 click **Submit**
-

Delete a Link:

To remove the Organisation Link permission, you can

-
- 1 Go to **TSW** home page and scroll down to **Organisation Links**

 - 2 on the row of the organisation link you wish to delete click  and your link to the organisation and all the permissions associated will be removed.
-

If you experience any technical issues, please email TSWusersupport@customs.govt.nz