GOVERNMENT OF WESTERN AUSTRALIA

Landgate

Client Portal

Government Agencies

Administration and Standard Users

Locate Value Secure Enable

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Value

Requesting portal access as external client

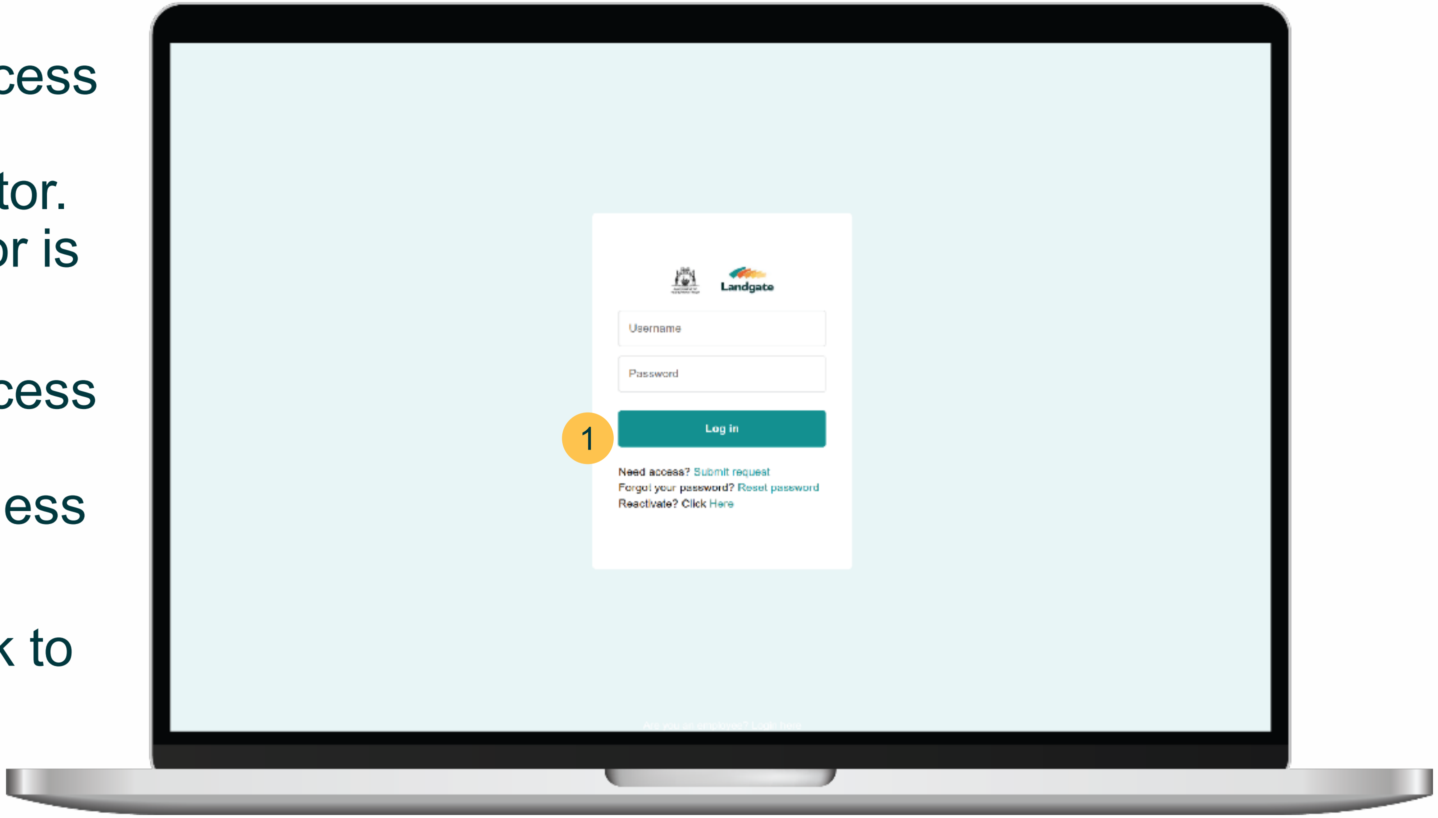
Request access

Your first and fastest option to gain access to the Client Portal is to contact your organisation's Client Portal administrator. Access provisioned by an administrator is immediate.

Alternatively, a person can request access to the Client Portal via the Portal login page. Access is granted within 2 business days.

1 Click on the "Submit request" hyperlink to launch the form.

The URL is: https://val.clientportal.landgate.wa.gov.au which will be activated post go-live.



Request access form

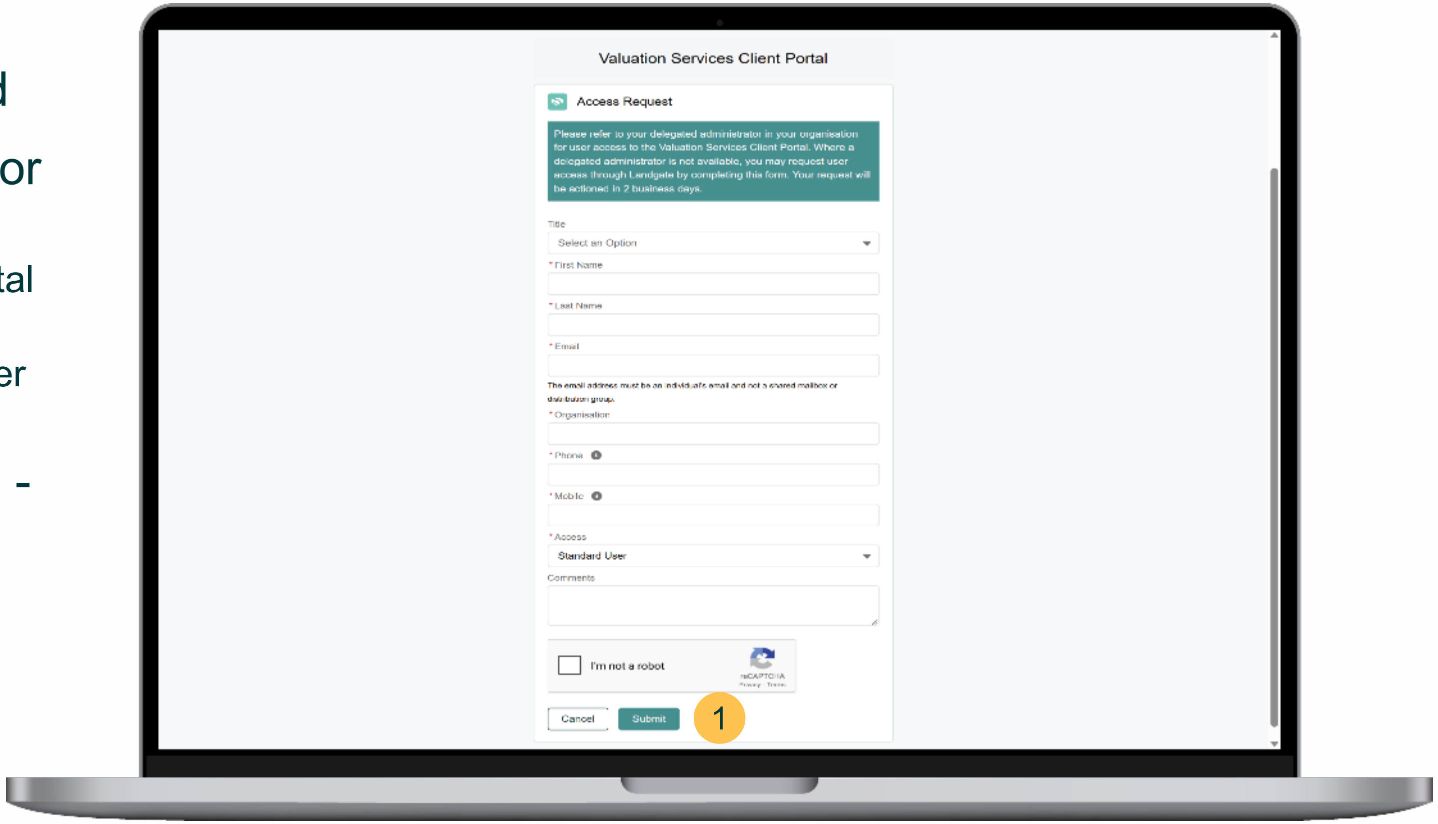
Complete the fields in the form. Either a Mobile or Phone number must be provided

Select either Standard User or Administrator access:

- Standard User – general access to Client Portal functionality
- Administrator – elevated access, including user provisioning and account management

1 On clicking Submit, the following message - "Your request has been successfully submitted" will appear to the user.

The submitted request is delivered to Valuation Services for review and action.

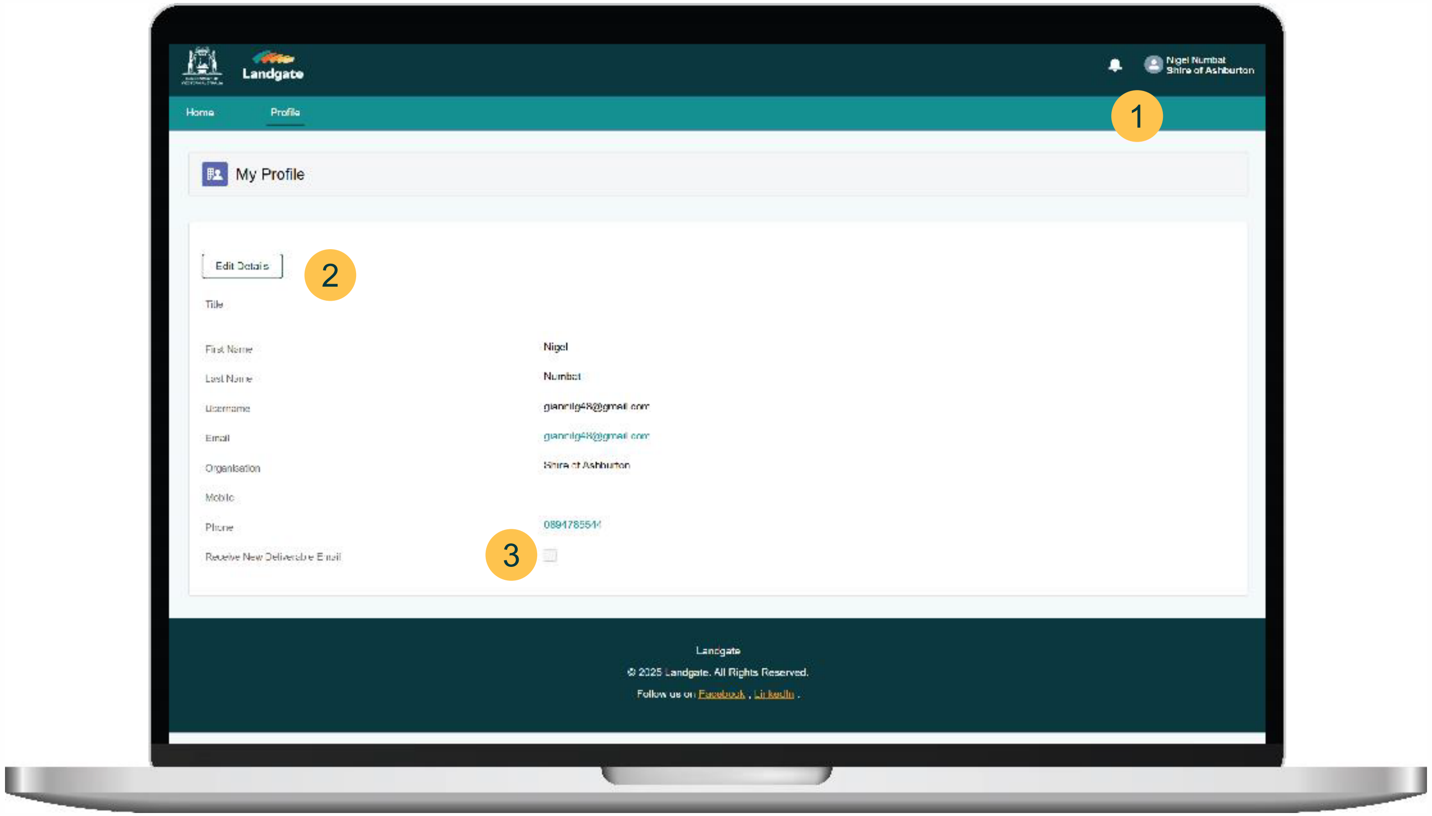


Value

Managing Your Profile

Updating your user profile

1. Users can click on their profile, then Settings.
2. Users can update their own user profile by selecting Edit Details.
3. Users can nominate to receive email notifications when deliverables are loaded by Valuation Services e.g. valuation rolls, other deliverables/reports

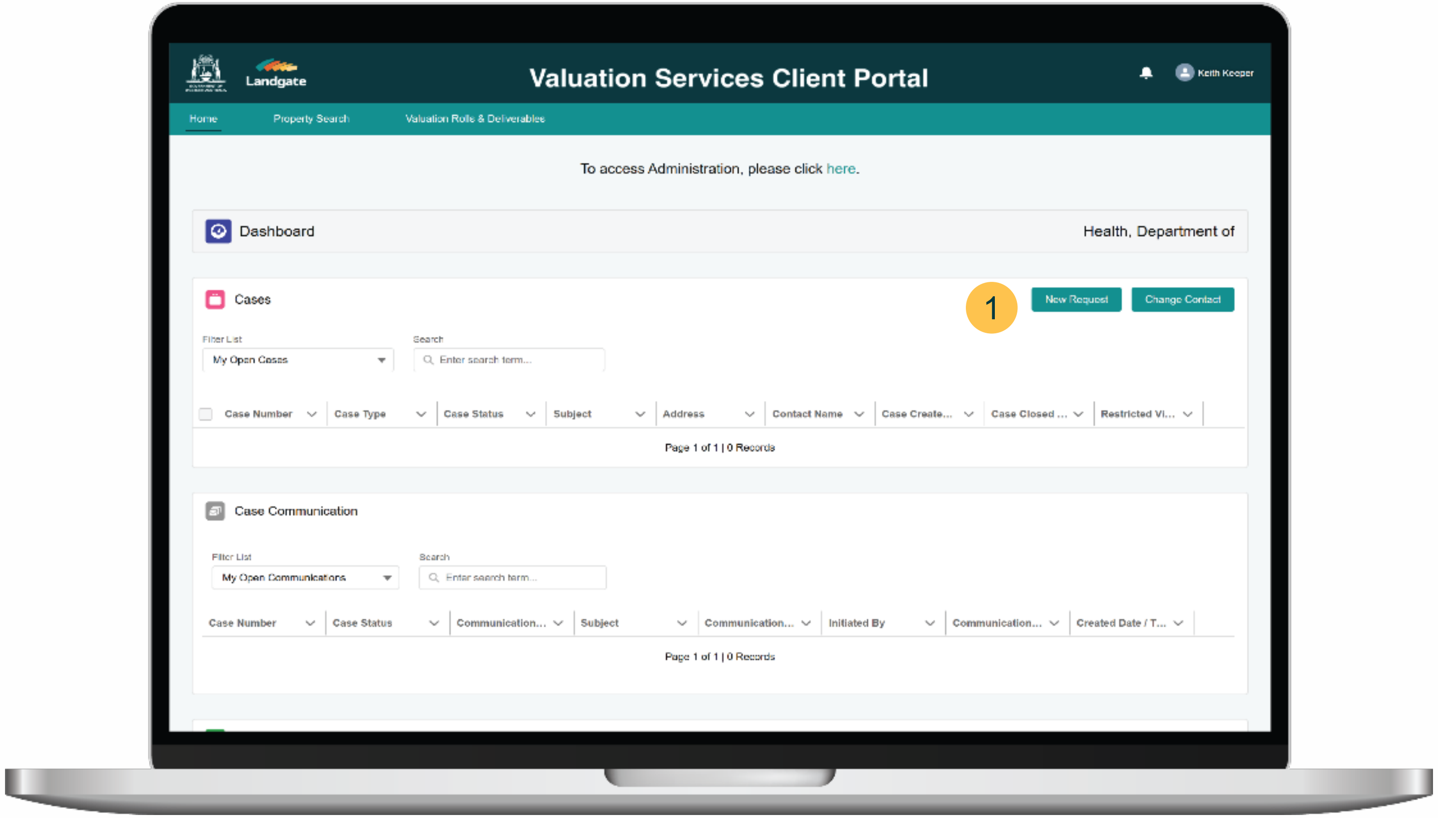


Value

Client Portal dashboard

Create new requests

1 At the top of the client portal dashboard is the **New Request** action button.

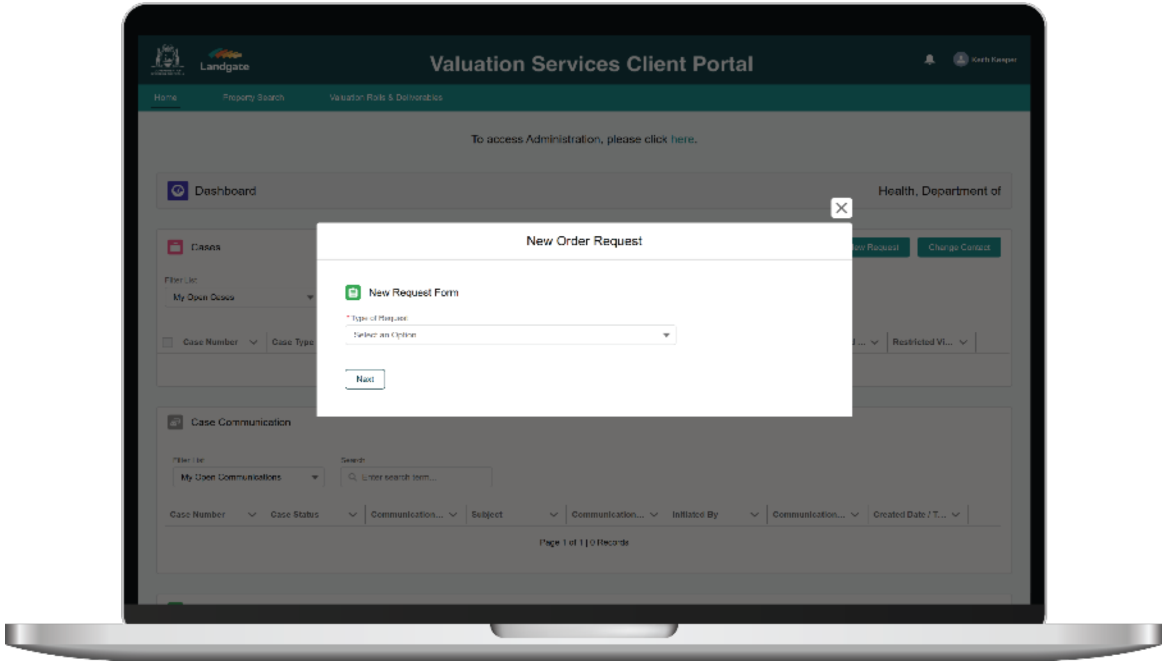


Create new requests

User will then be presented with the **New Request Form** drop down.

Make the relevant selection. The list that you see in the screenshot may not all be relevant for your agency. Only applicable options will be viewable.

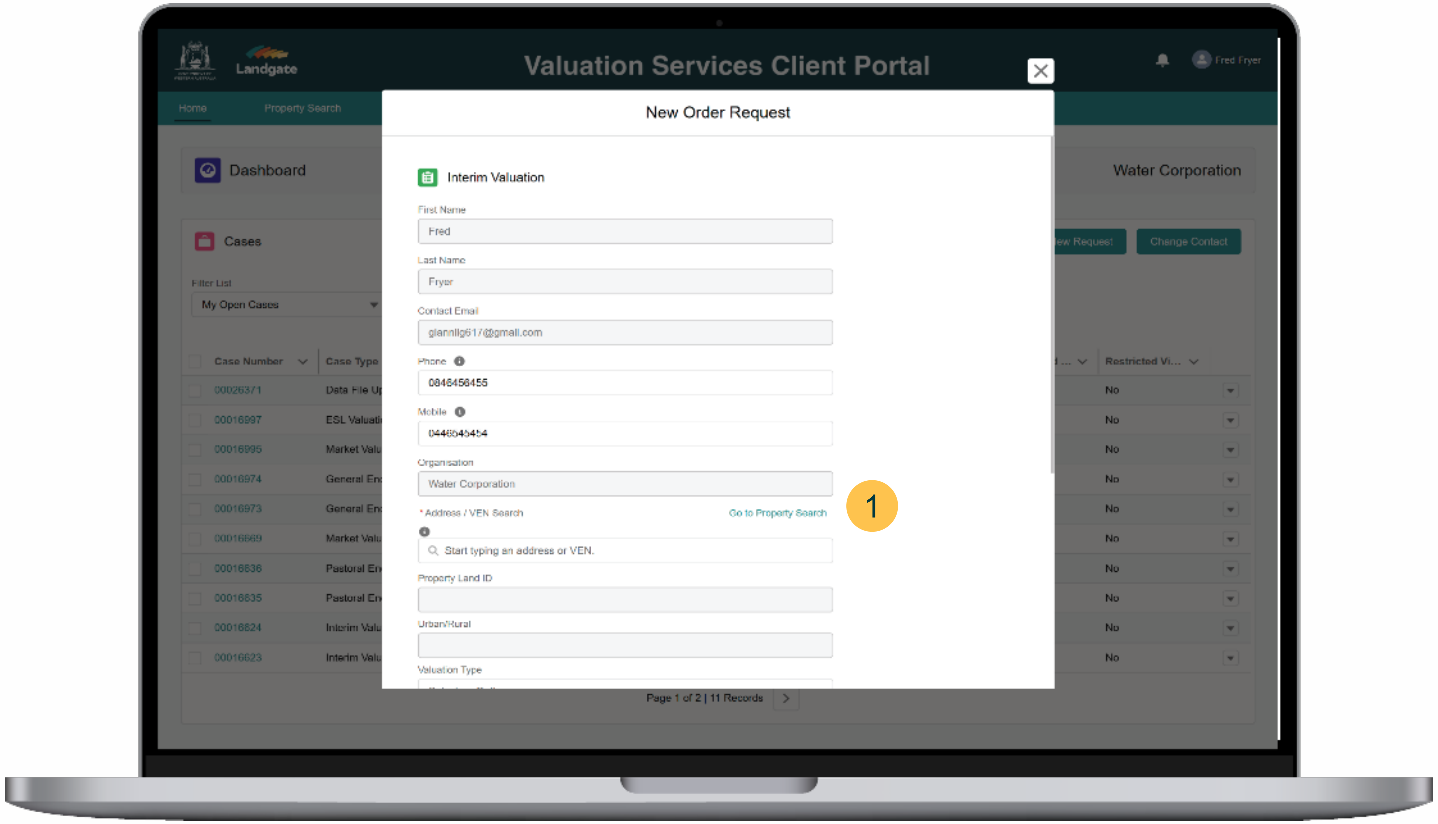
Agencies that regularly provide data files to Valuation Services will be have the “Data File Upload” form to upload these files.



Create new requests - address/VEN search

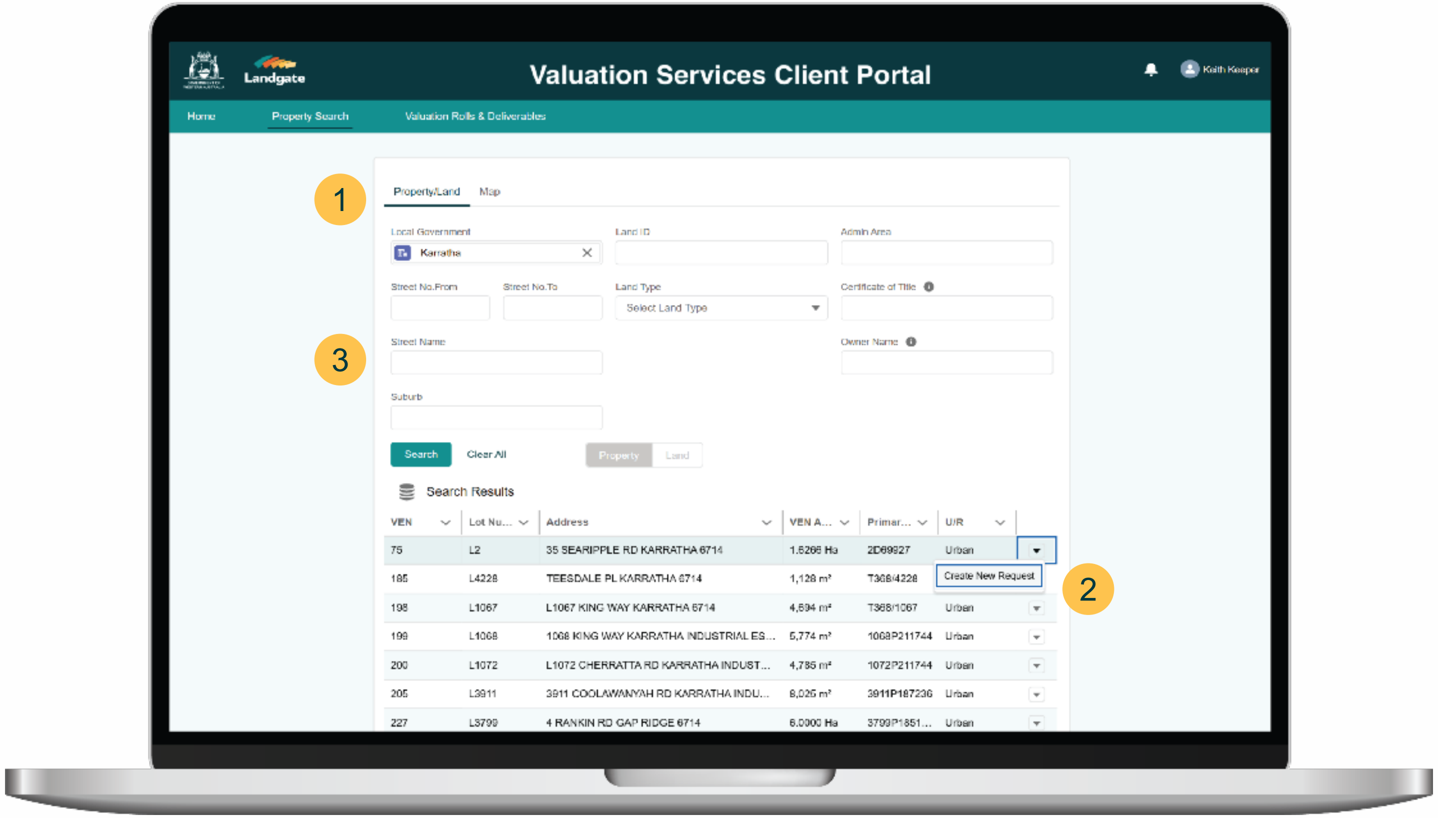
1. Request forms may ask for an Address/VEN to identify the associated property that the request relates to. Type in the address or VEN and you will be provided with matched results for selection.

   The inclusion of an Address/VEN will ensure that actions are completed on the relevant property.



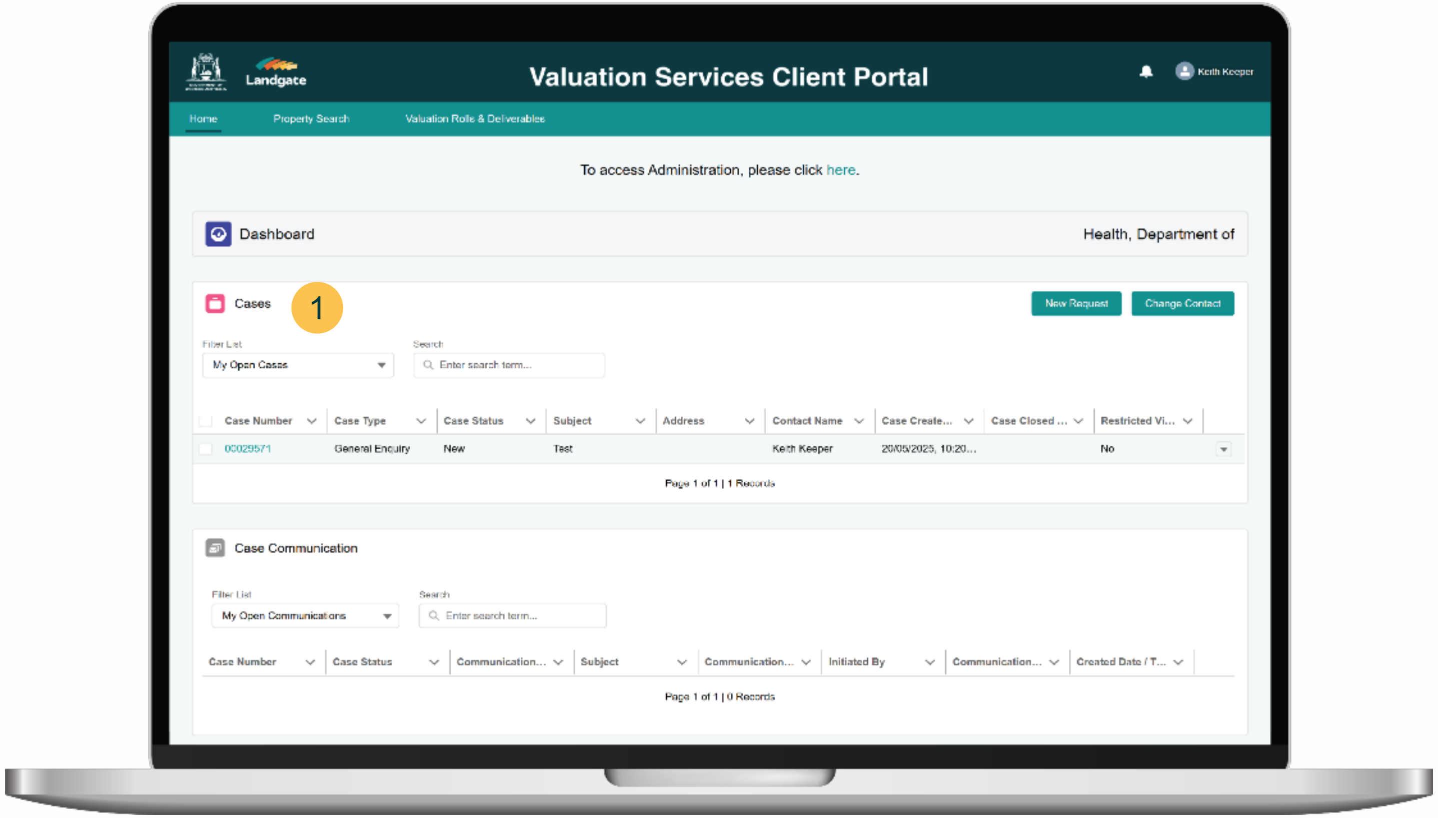
Create new requests - advanced property search

1. If a target property cannot be identified using an address or VEN, the user has the option to conduct a form-based general search via the **Go to Property Search** link.
2. From the search results, you can click the drop down and select "Create New Request". The relevant form can then be selected and completed.
3. **Help tip**: when entering the Street Name, do not enter the street type in full e.g. Road. Either enter the abbreviation (e.g. Rd) or no street type.



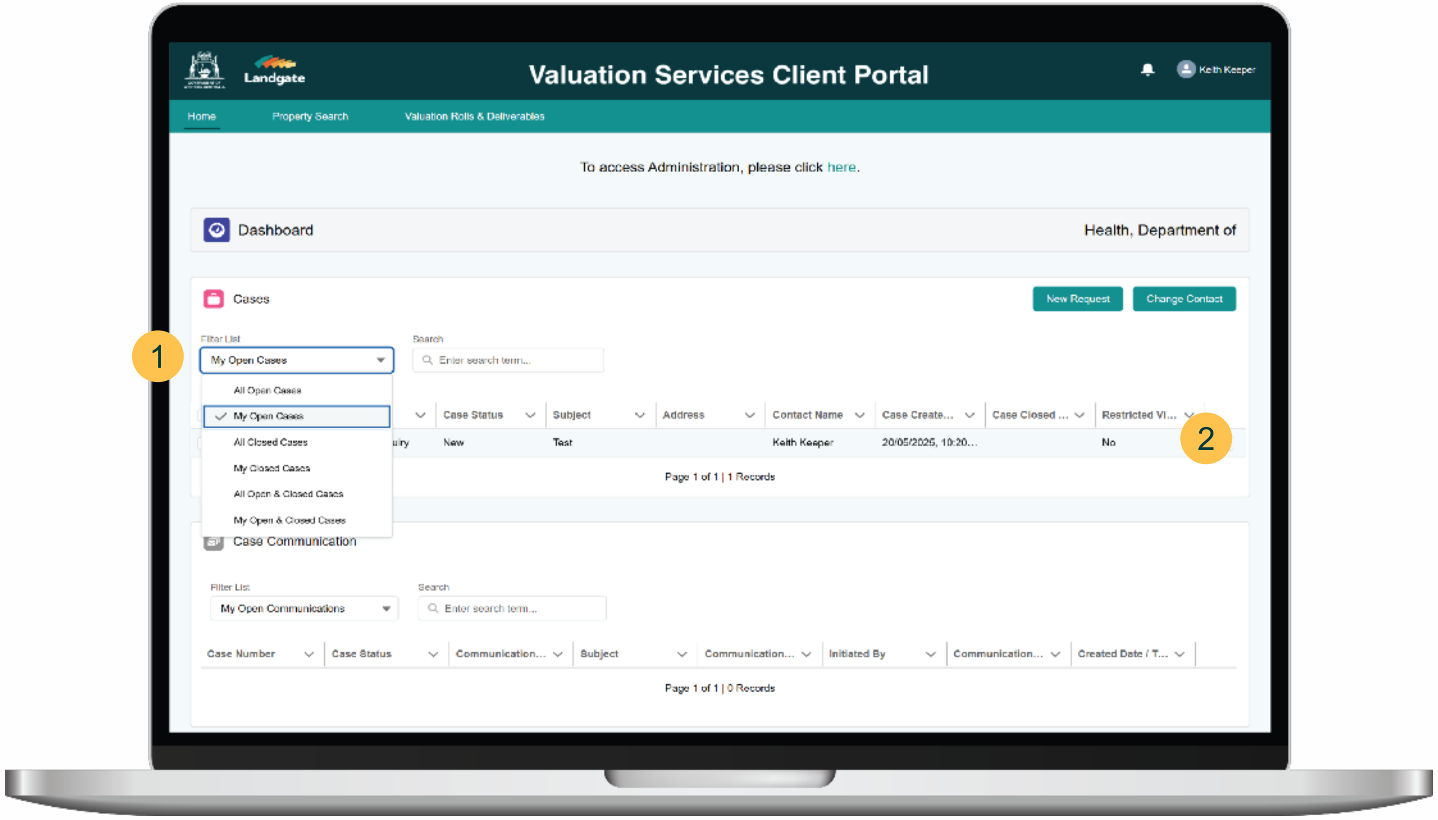
Cases

1. The top section of the **Home Dashboard** displays the open cases for the client user. This is the default view.



Cases

1. Filter lists and search function are available to locate a case. This includes viewing all cases submitted by users at your organisation.
2. Cases that are marked as **Restricted View** can only be seen by the contact owner and administrators.

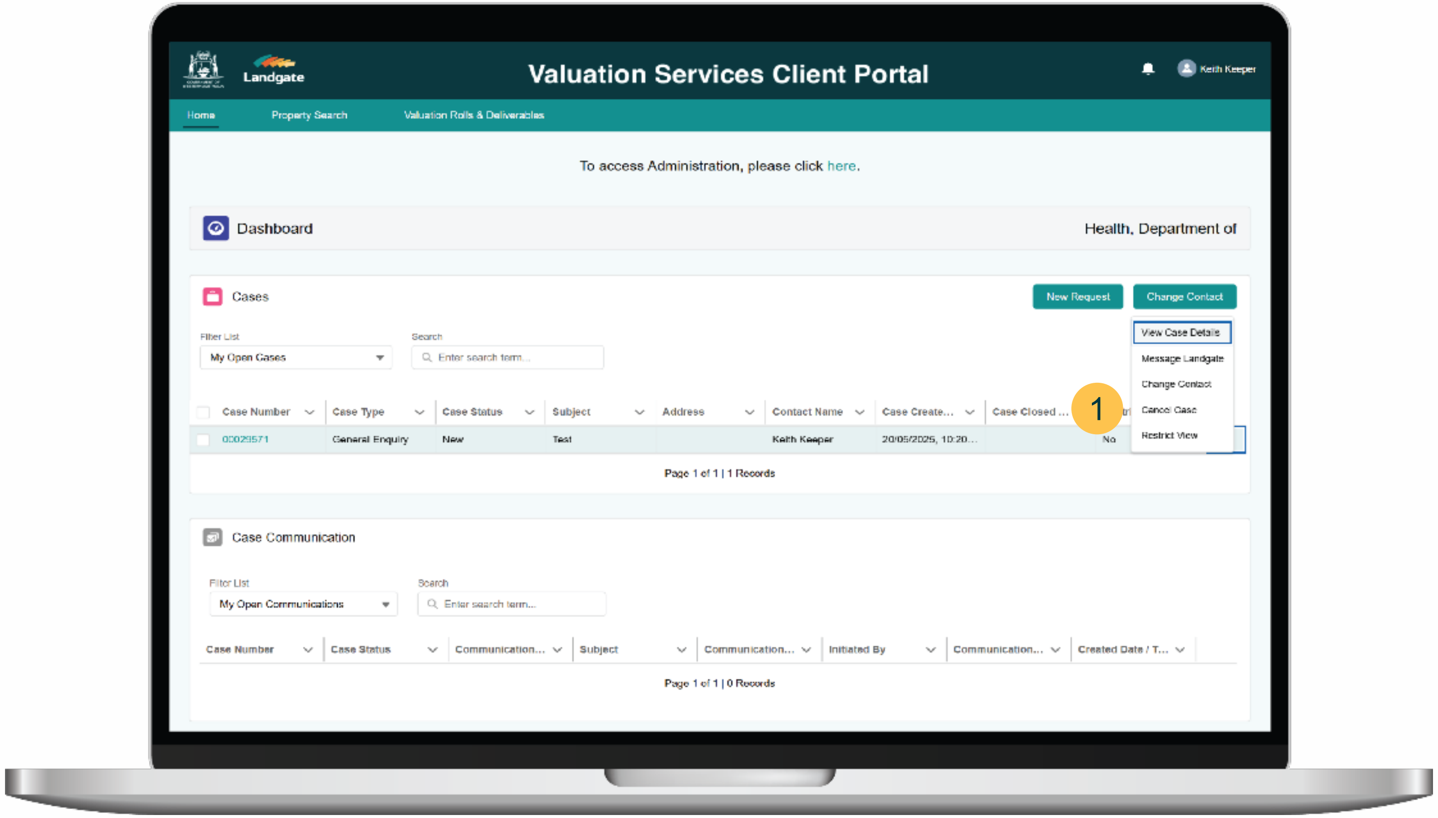


Value

Cases – actions menu

1 On the right side of the case table is an **actions menu**. The actions that can be taken for a case are:

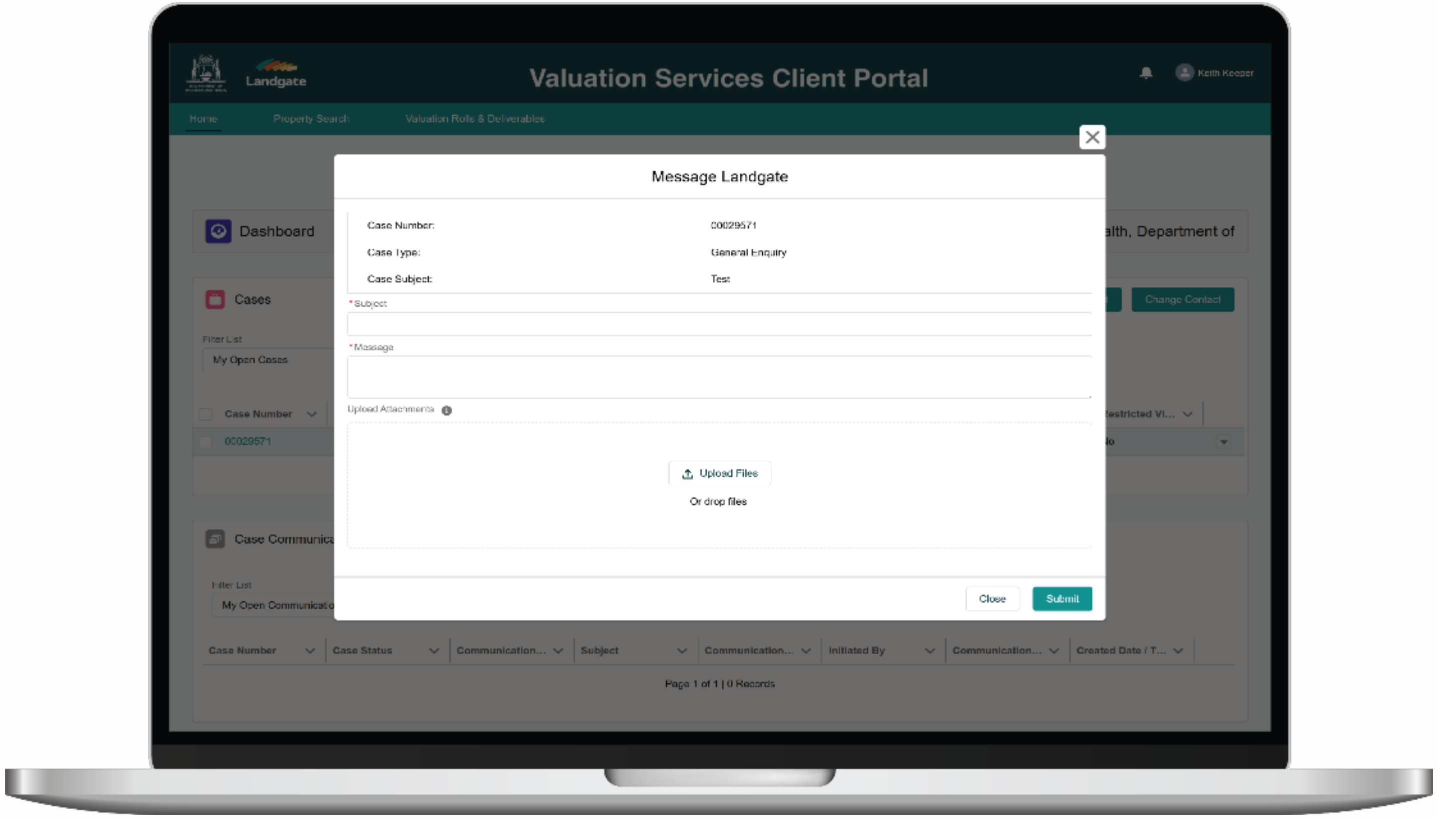
- View case details (users can also click on the Case Number link)
- Message Landgate
- Change the contact
- Cancel the case
- Restrict the case view



Cases – message Landgate

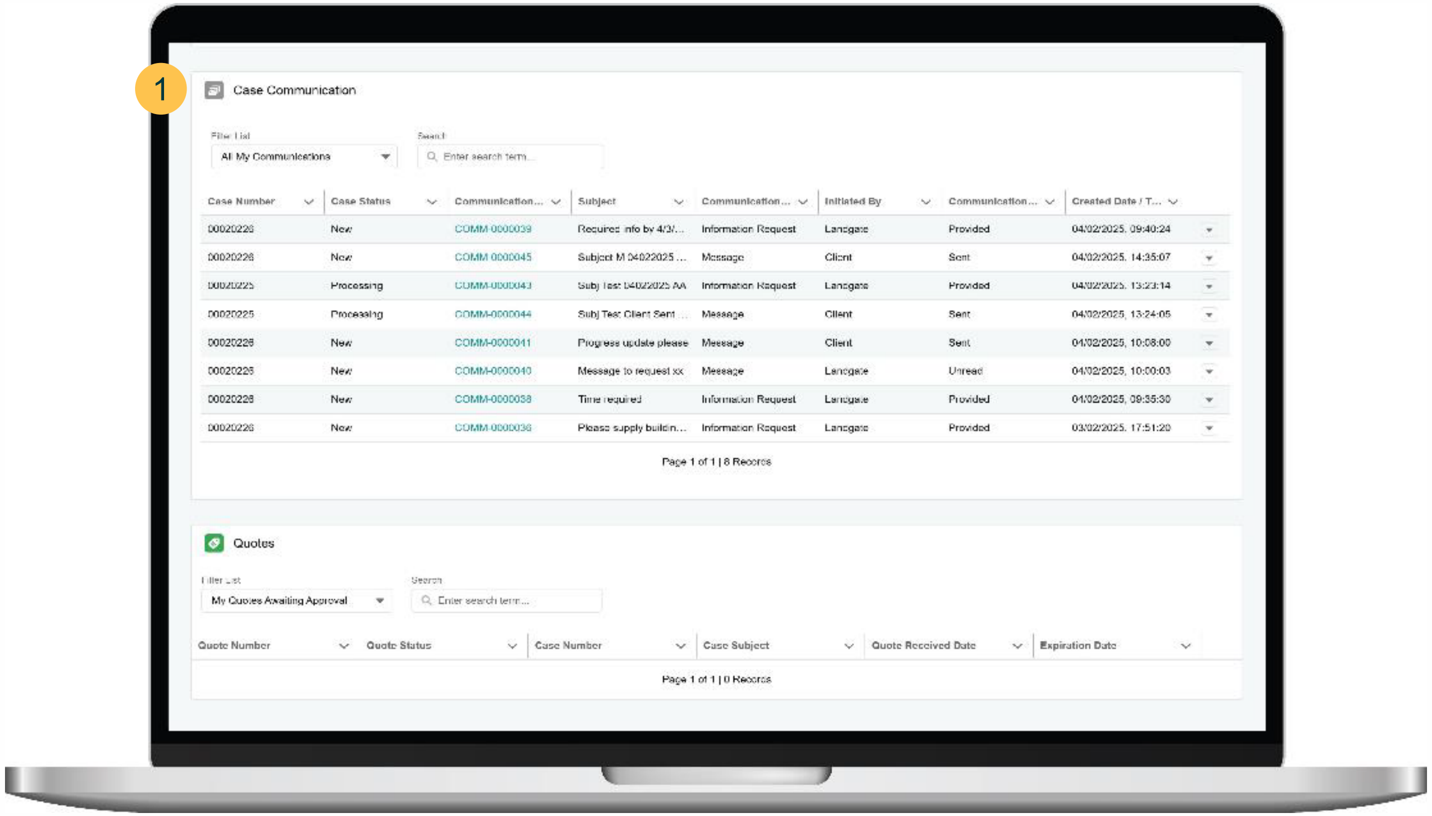
For open cases, users can message Landgate within the context of a case, by selecting this item in the action menu, completing the form and clicking Submit. Files can be attached with the message.

The case owner at Landgate will directly receive the message and reply/action as required.



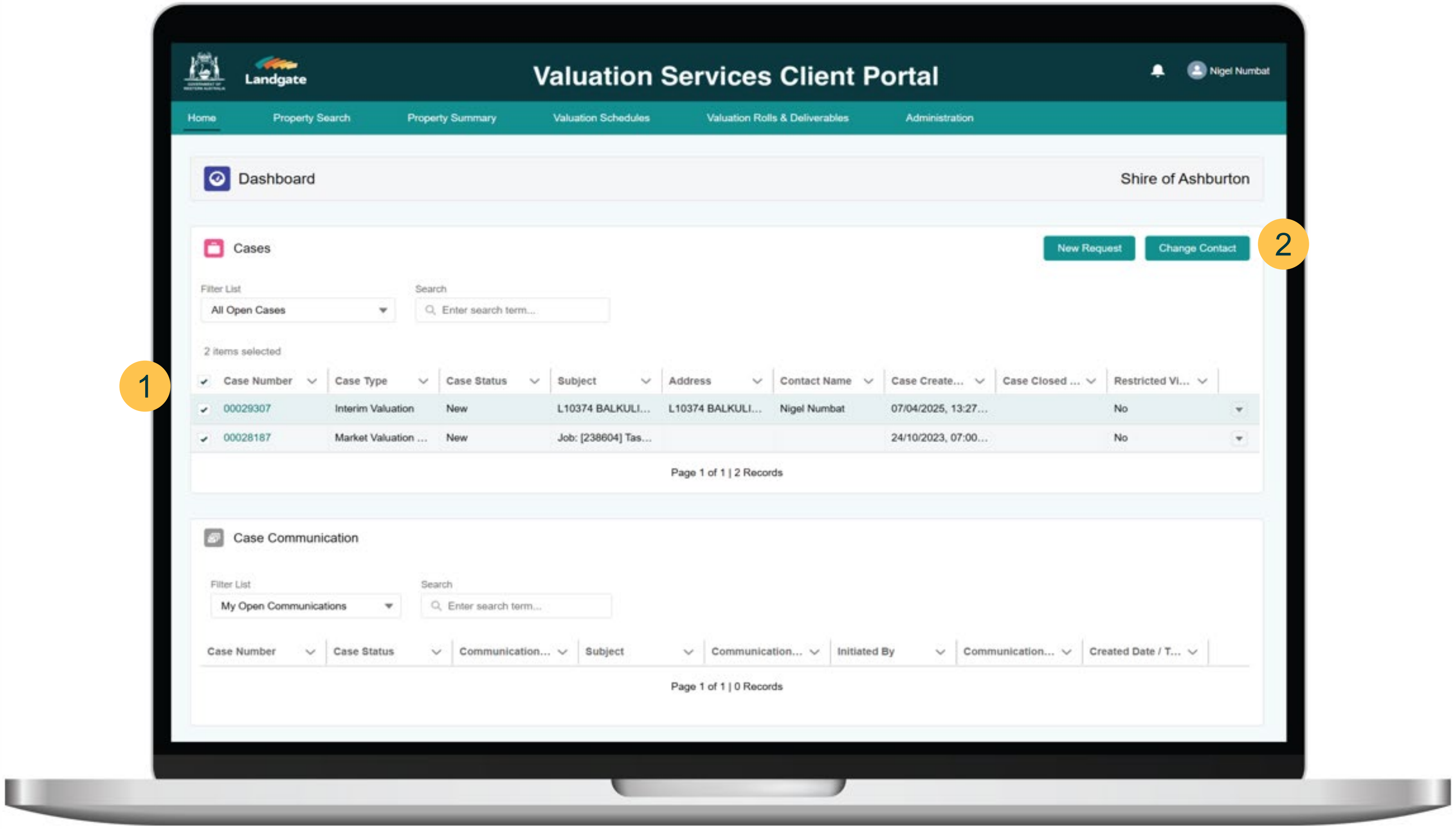
Cases – view messages

1. Sent and received messages will be visible in the **Case Communication** section of the Dashboard.



Cases – change contact

1. Select cases
2. Click the Change Contact button to update the contact for multiple cases.

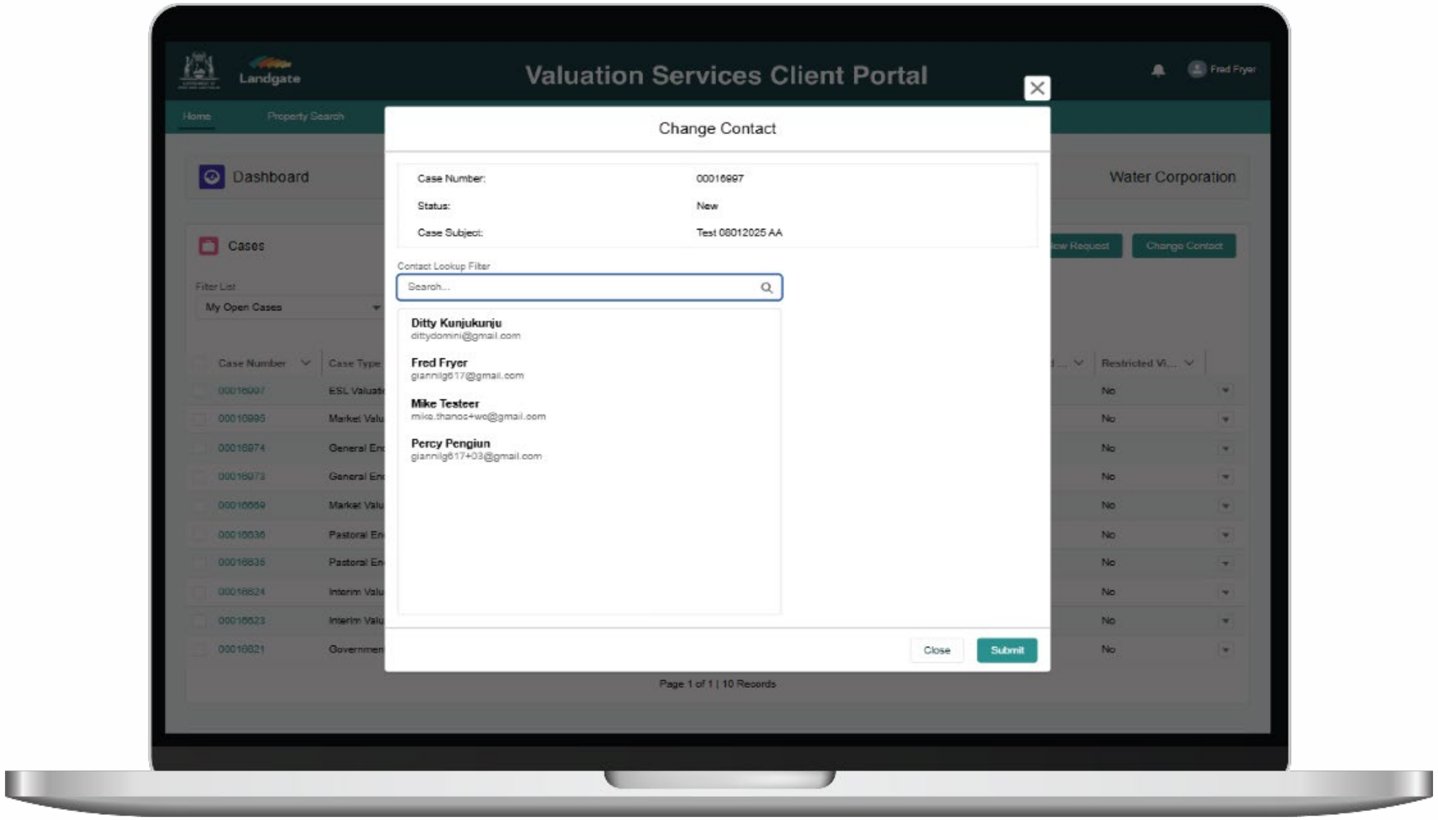


Cases – change contact (cont.)

Search and select a new contact. The search will only provide registered users in your organisation.

Reassigning a case to a new contact will ensure that:

- messages are received from Landgate by an active user; and
- the user can follow the progress of the case.

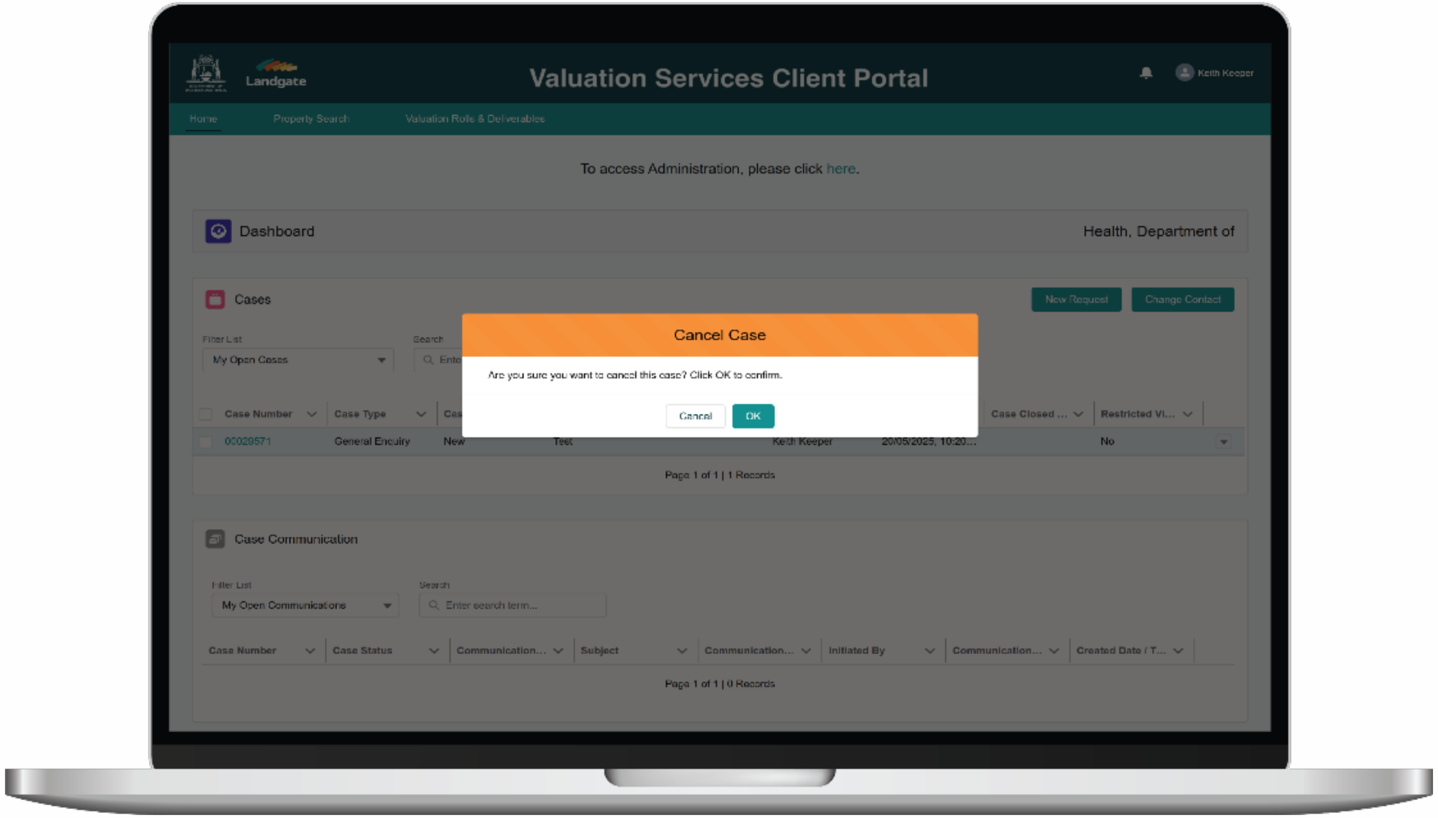


Value

Cases – cancel a case

Selecting the **Cancel Case** action will ask for confirmation from the user.

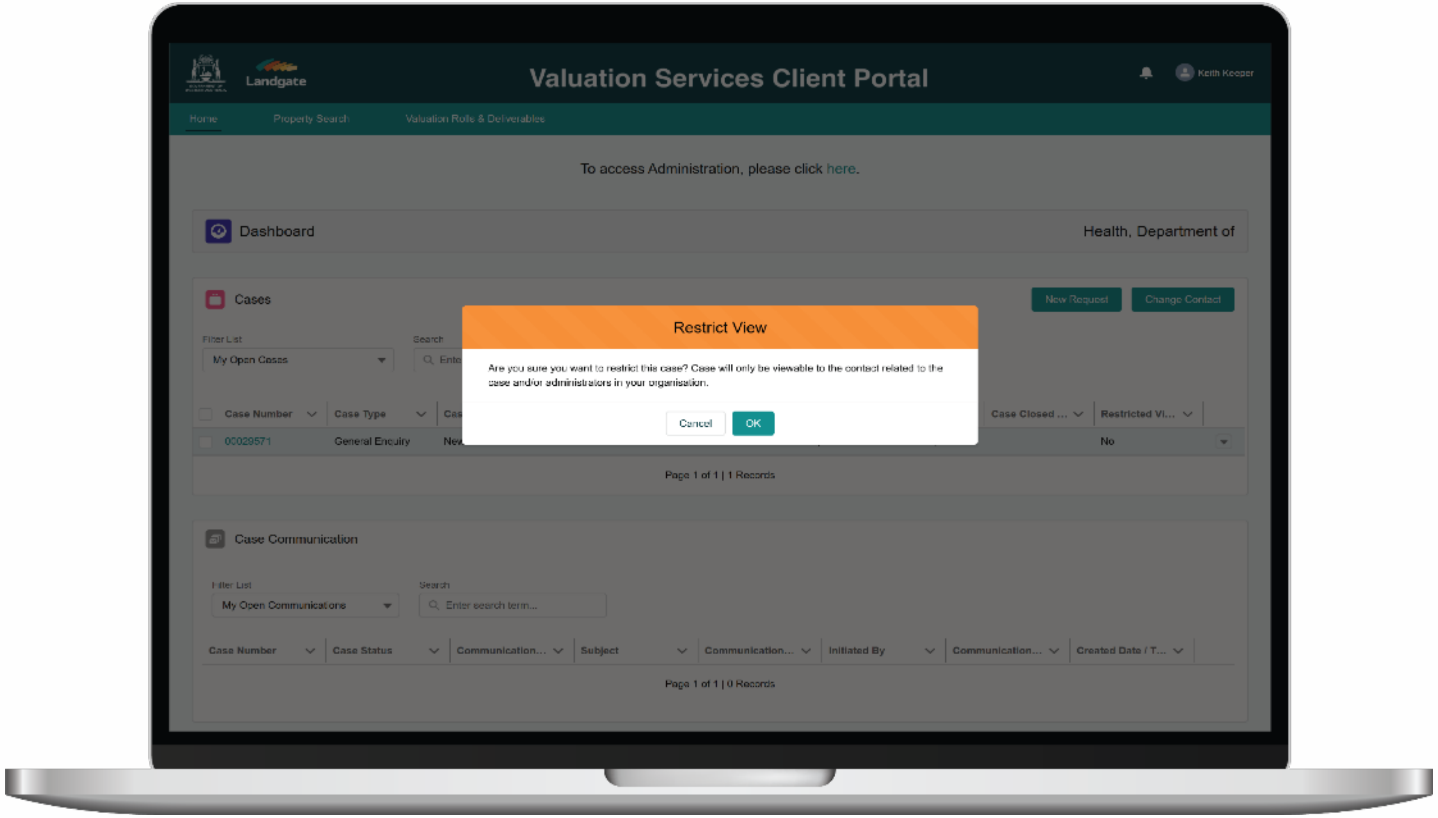
Cancel Case is only available when the case status is New. However, if the case has been progressed by Landgate, the Cancel Case option may not be accessible. In such instances, use the Message Landgate action to request cancellation of the case.



Cases – restrict case view

Selecting **Restrict View** action, will allow users to restrict who can view the case. This will change the visibility of the case so that only the case contact and administrators can see the case in the dashboard.

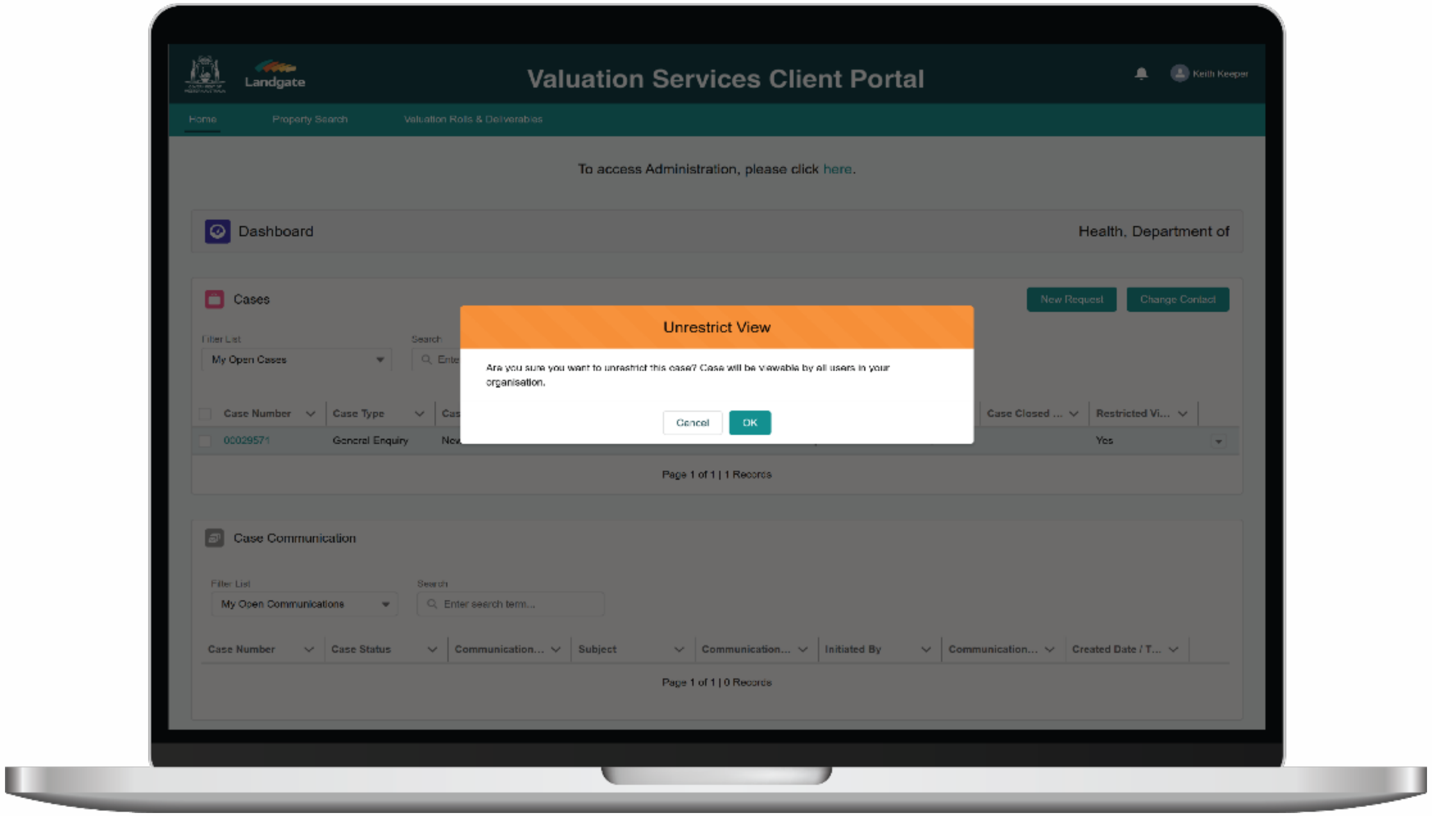
User will be prompted to proceed with this action.



Cases – unrestrict case view

Selecting **Unrestrict View** action will remove the restriction on the case to allow it to be visible to all in the organisation.

This action can be completed by the case contact or administrators. User will be prompted to proceed with this action.



Case Communication

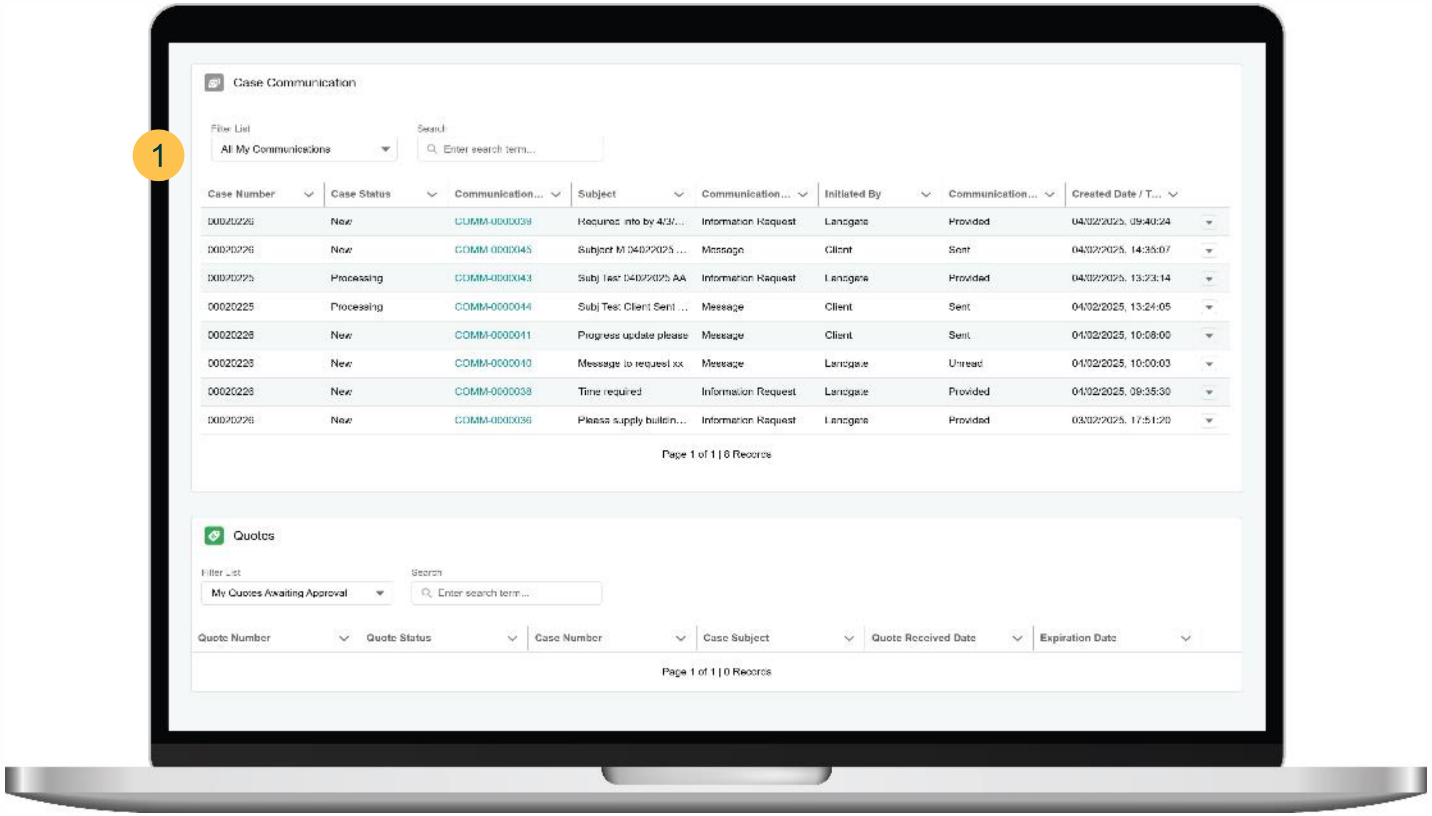
There are two categories for communication:

Messages. General communications between the Client and Landgate as the preferred method to email/phone channels.

Information Requests. Landgate requests the client to provide specific information or artefacts in relation to a case. The case may be placed on hold while awaiting for the information.

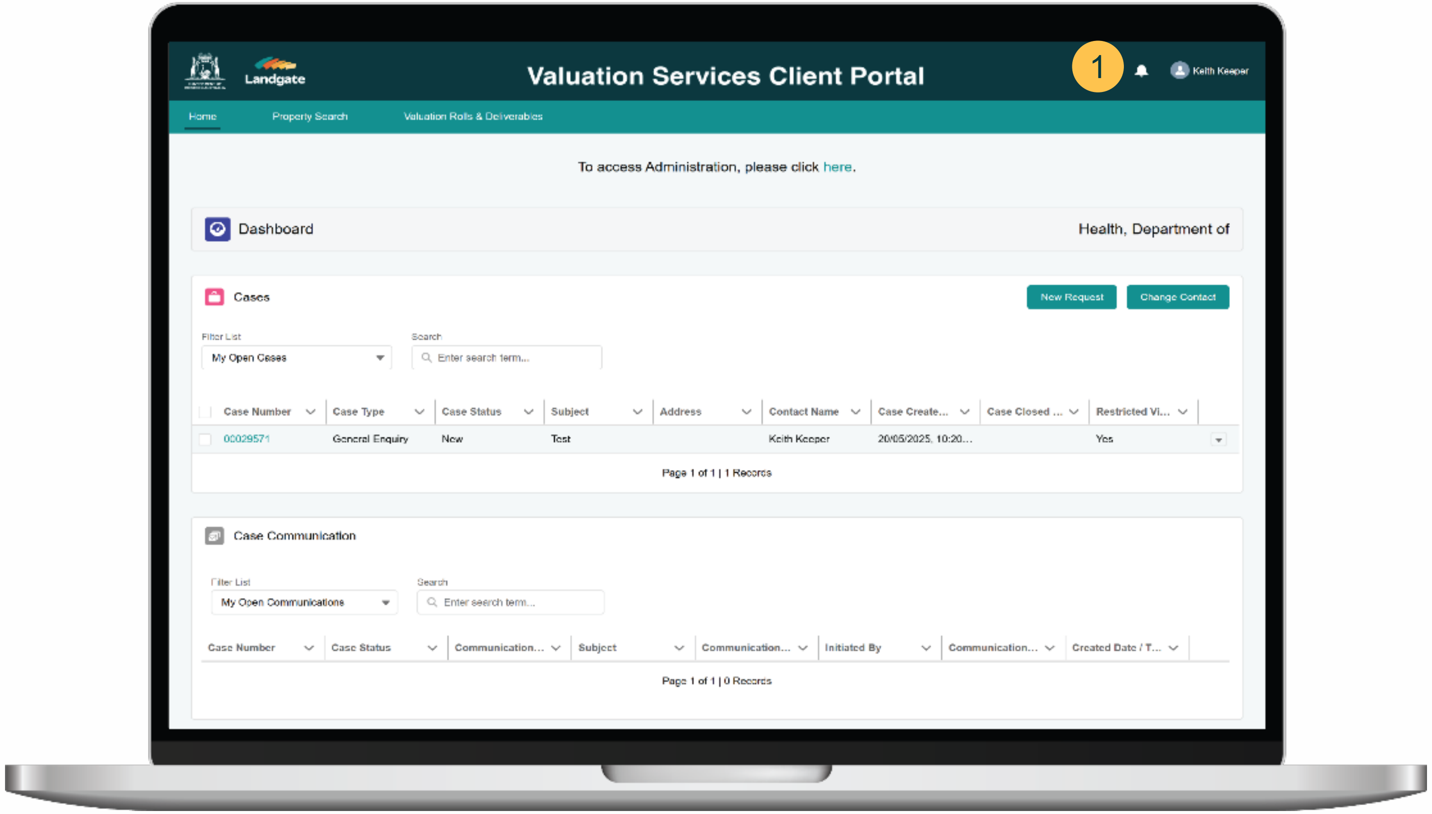
1 Communications sent and received will be visible in the Case Communication section. Filter lists and search function are available to locate a case. The list will default to "My Open Communications"

The case contact will receive an email notification when a message or information request has been received from Landgate.



Case Communication

1. Communications received will also be displayed in the notifications (bell icon) at the top right corner of the dashboard.

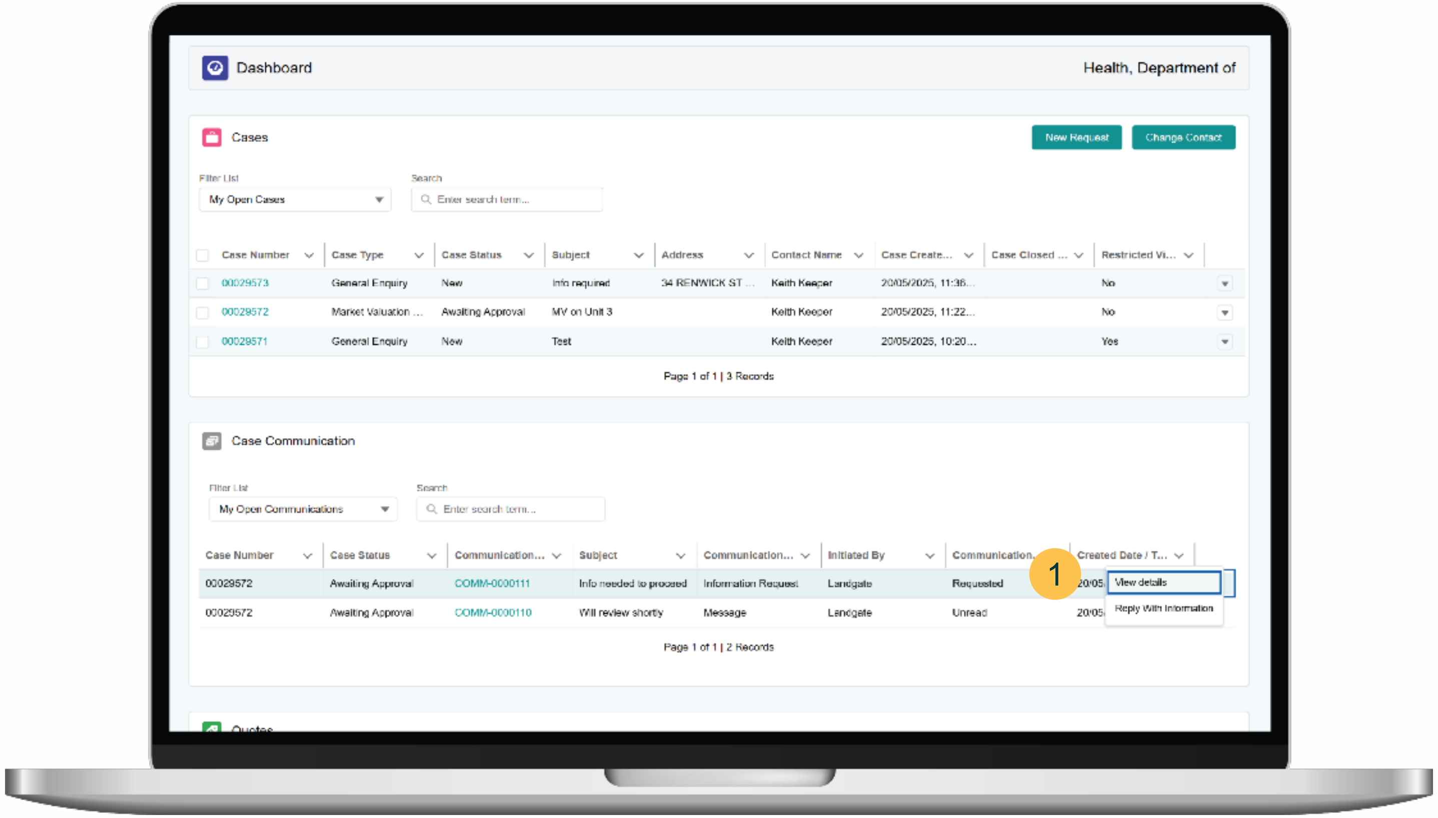


Case Communication – view details

1. In the Case Communication list, is an action menu to **view the communication details**, including attachments. This action is available for all communication types:

   - messages received from Landgate
   - messages sent to Landgate
   - information requests received from Landgate

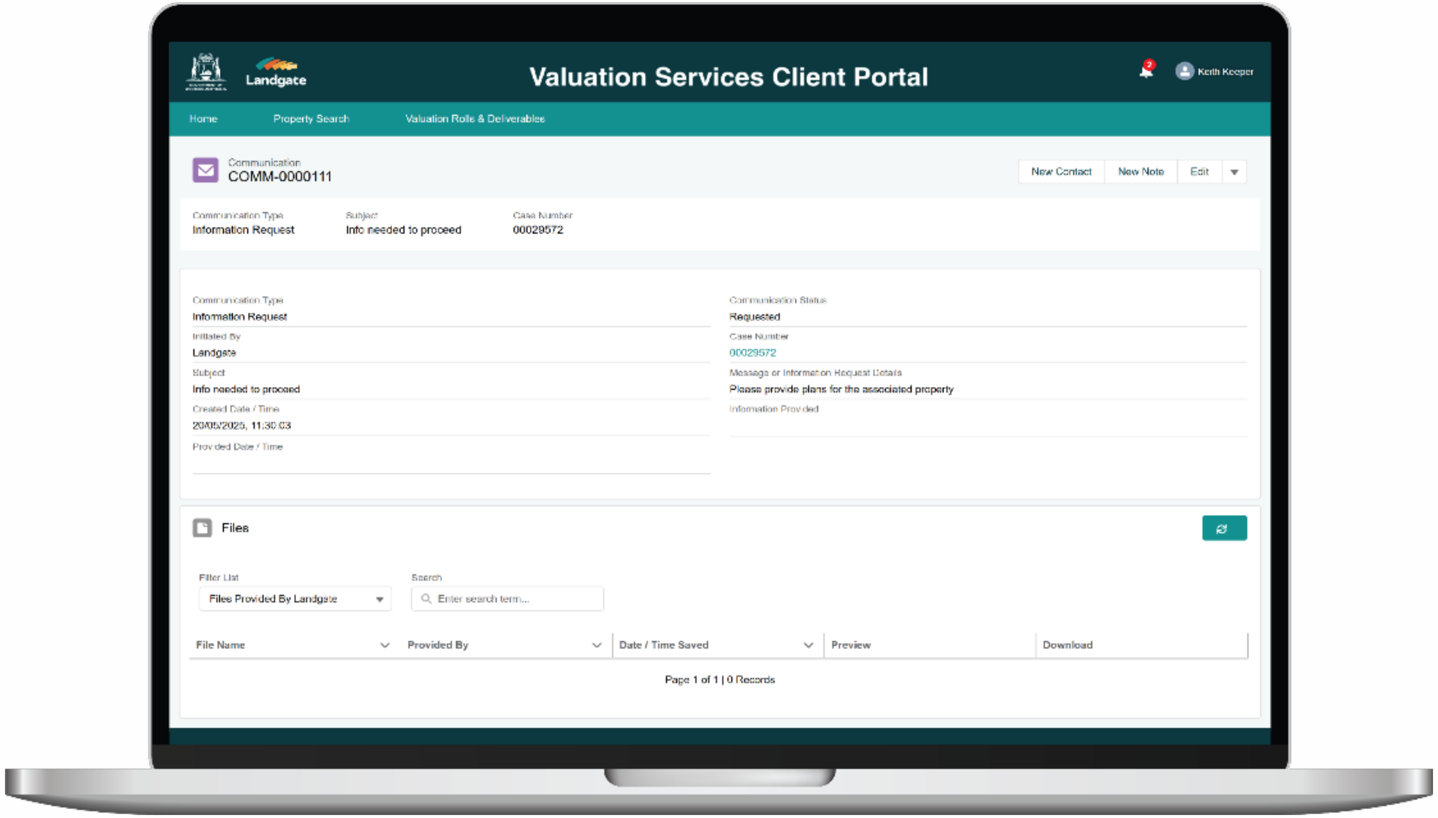
   When a contact has been updated for a case, all communications (open and closed on the case) can be viewed and require action (if needed) by the new contact in the Case Communication list.



Case Communication – view details

On clicking View Details for a message or information request from the Case Communication list, the full message will be displayed.

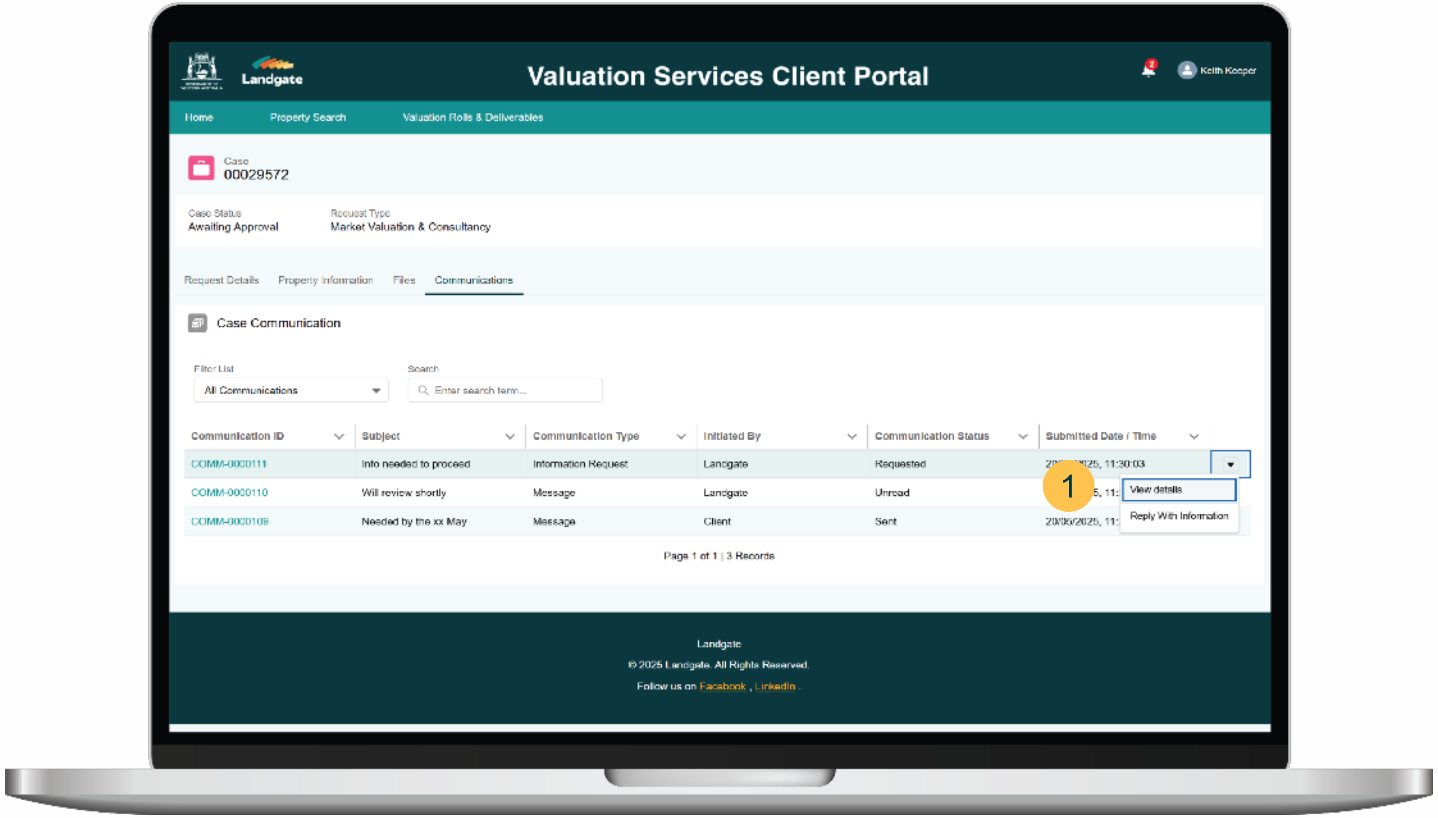
Any attachments included with the message will also be viewable.



Case Communication – message received

1. When a message is received from Landgate and has been read, the case contact can mark the communication as “Mark as Read”.

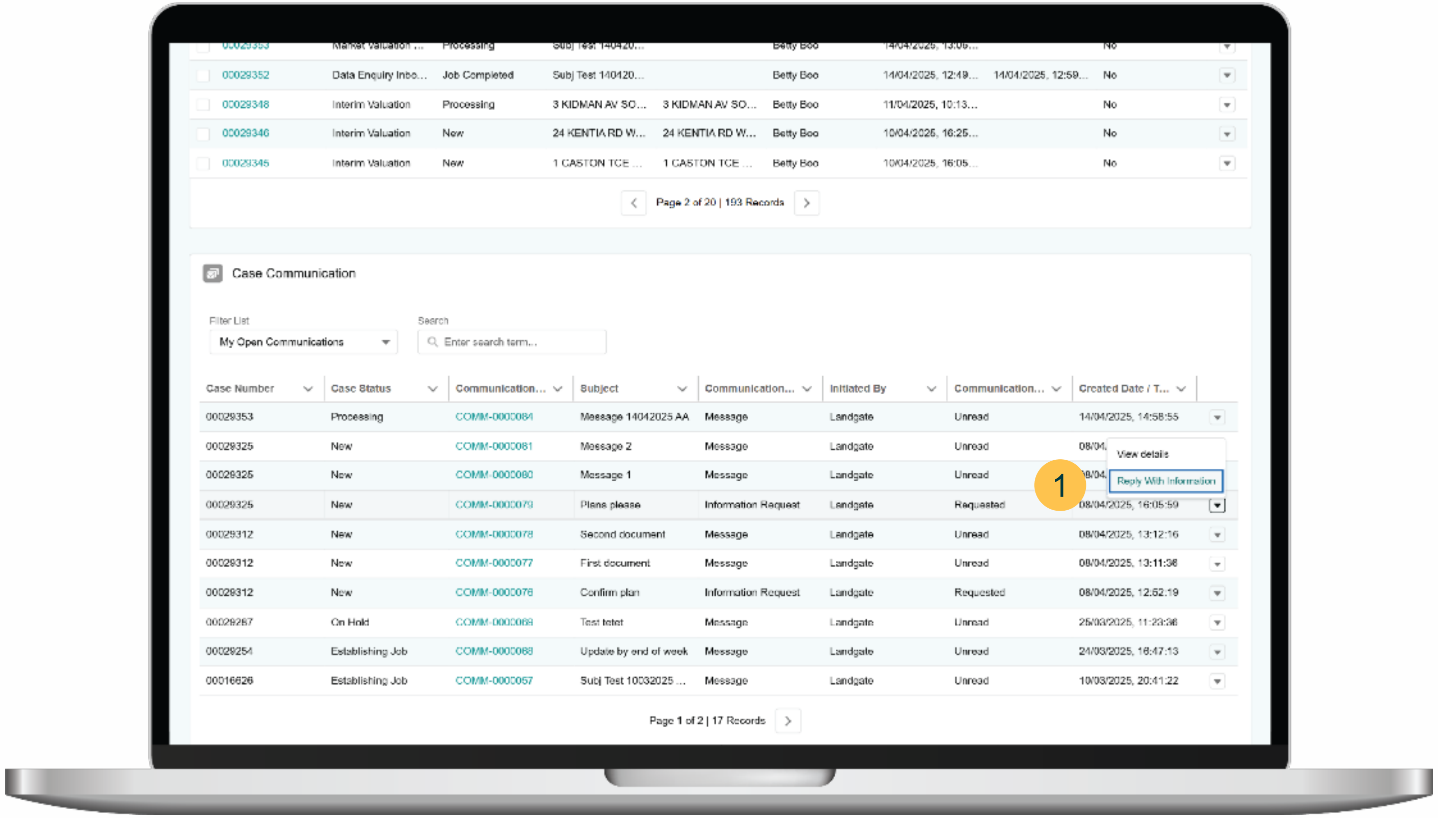
   This moves the message to the Closed Communications list. This way the user by default only sees what is outstanding in the Open Communications list.



Case Communication – information request received

1. When an information request has been received from Landgate, the status is marked as **Requested**. In the action menu the case contact is use “Reply With Information” to send the requested information to Landgate.

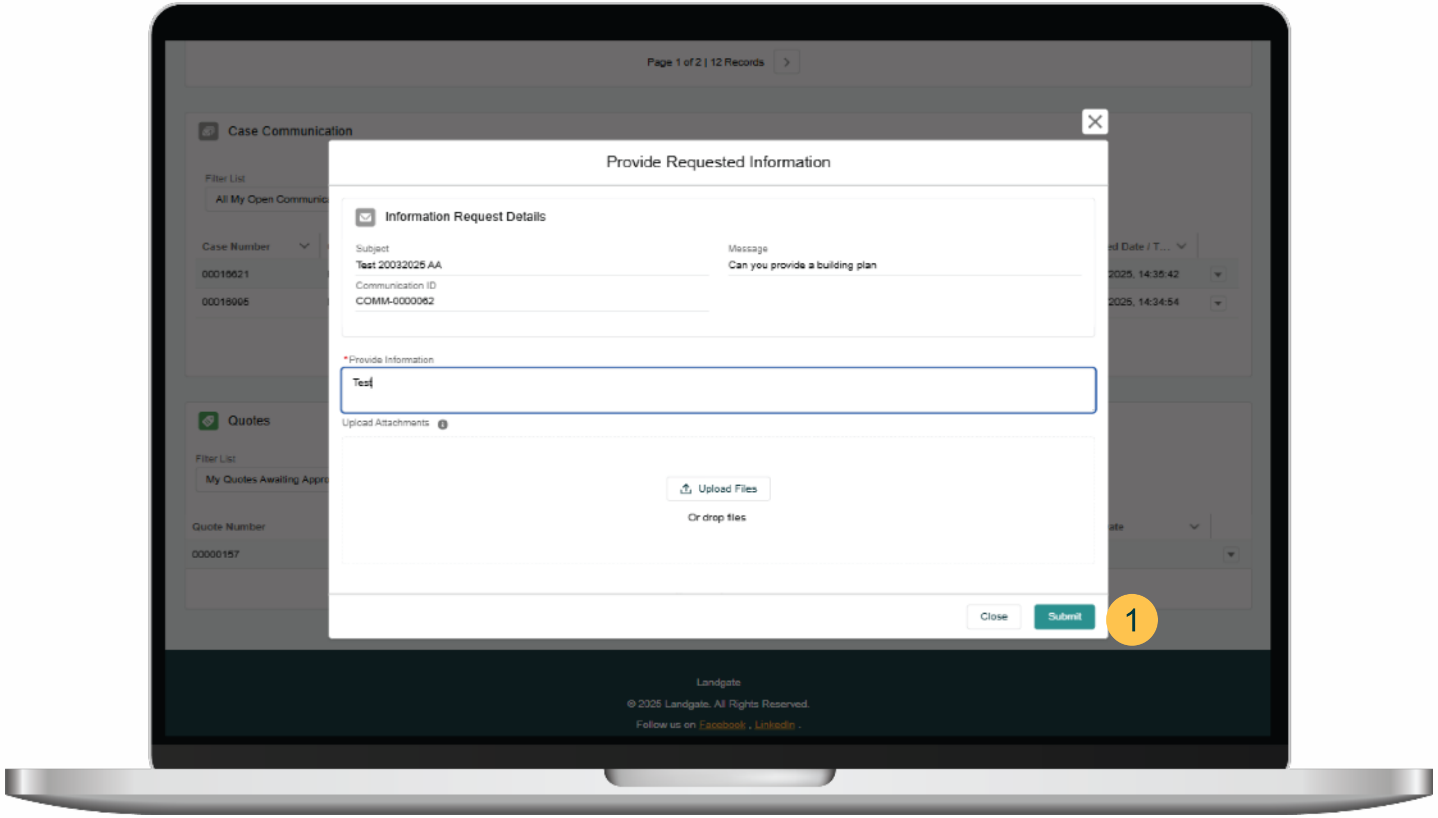
   Clicking “View details” will display the full message and attachments.



Case Communication – reply to information request

1. On clicking “Reply With Information” to an information request, a prompt will appear to enter the message and attachments (if needed) to be sent to Landgate.

   On **Submit**, the status will update to **Provided**. This action will also move the information request to the Closed Communications list. This way the user by default only sees what is outstanding in the Open Communications list.



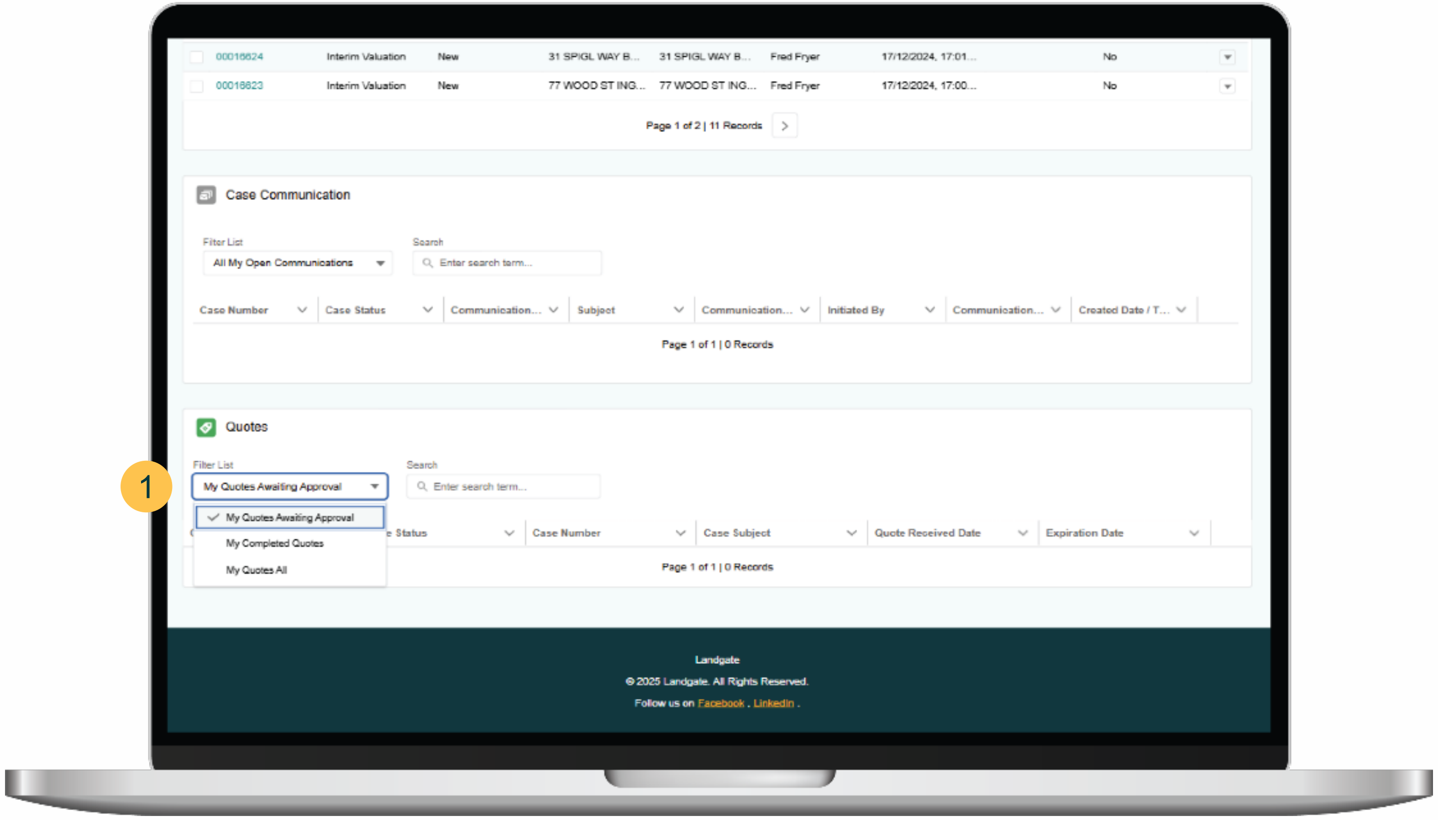
Quotes

1. Quotes received from Landgate will appear in the Quotes list. The list with default to “My Quotes Awaiting Approval”.

   Filter lists and search function are available to locate a quote.

   Only the case contact can view a quote on a case. The case will need to be reassigned to new case contact for the quote to be viewable by that person.

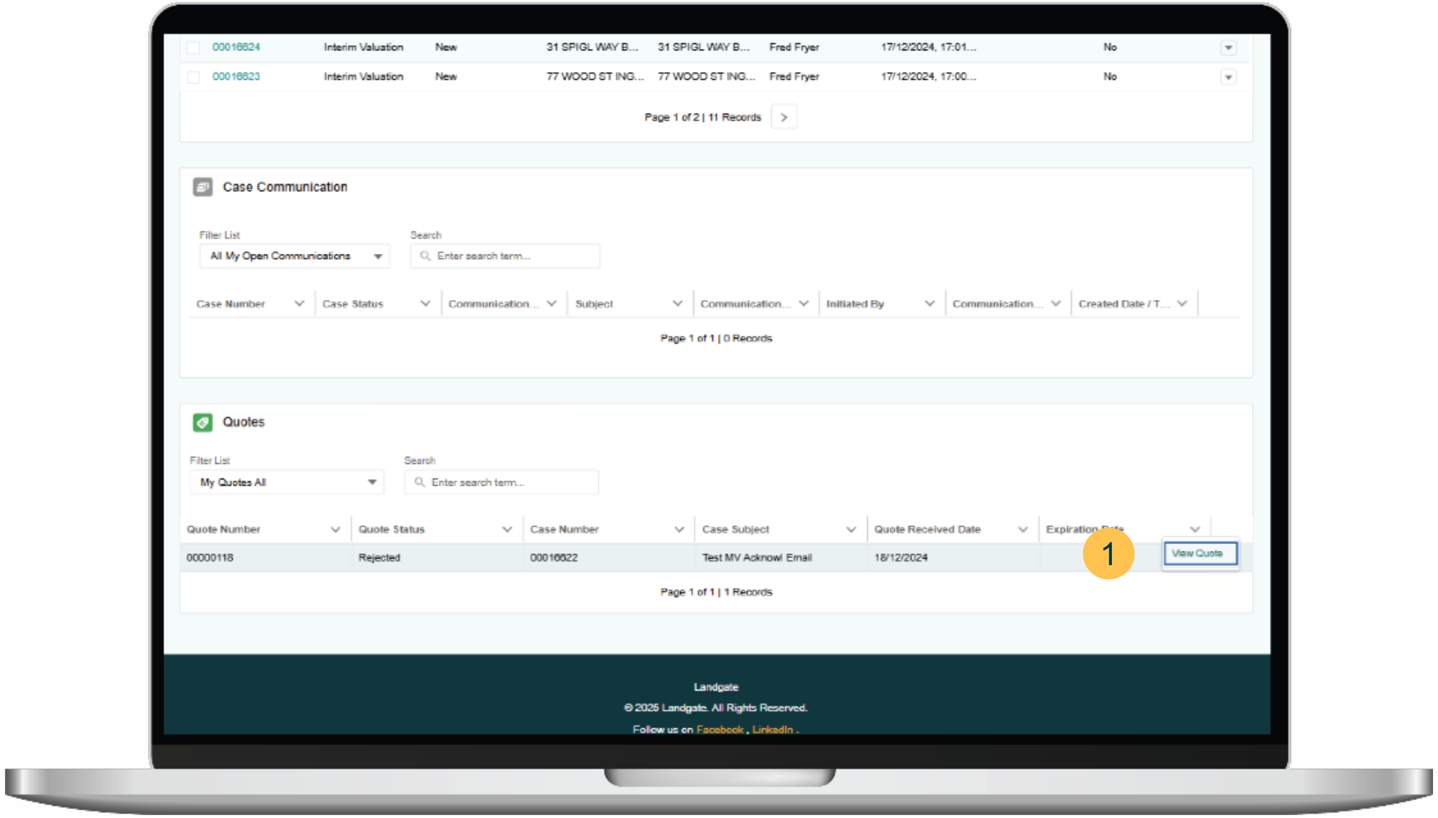
   When a contact has been updated for a case, all quotes (outstanding and completed on the case) can be viewed and require action (if needed) by the new contact in the Quotes list.



Quotes – view details

1. From the Quotes list, the case contact can view full details of the quote by clicking “View Quote” to preview the quote document.

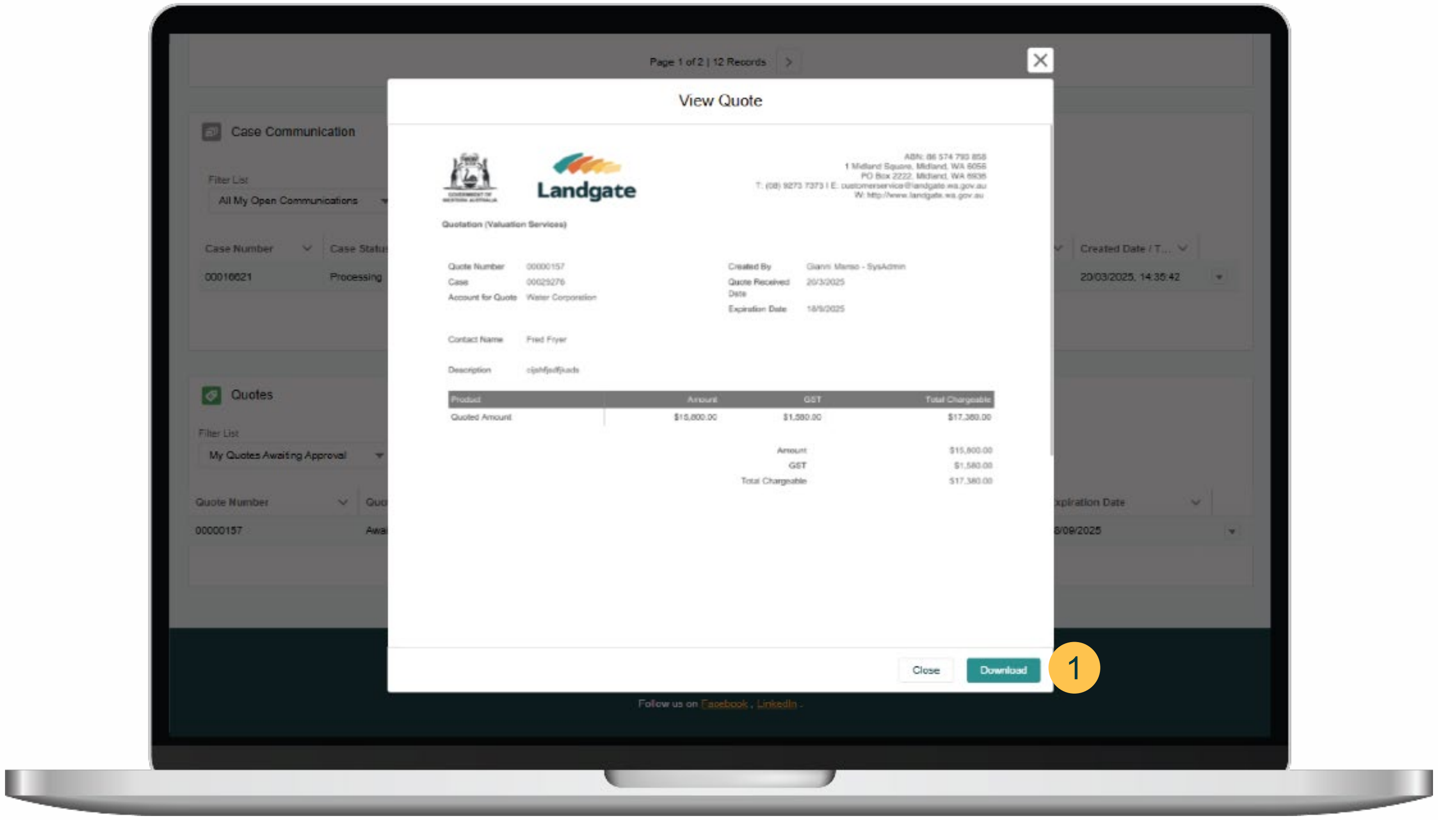
   This action is available for outstanding and completed quotes.



Quotes – download document

Viewing the quote will display a preview of the quote document.

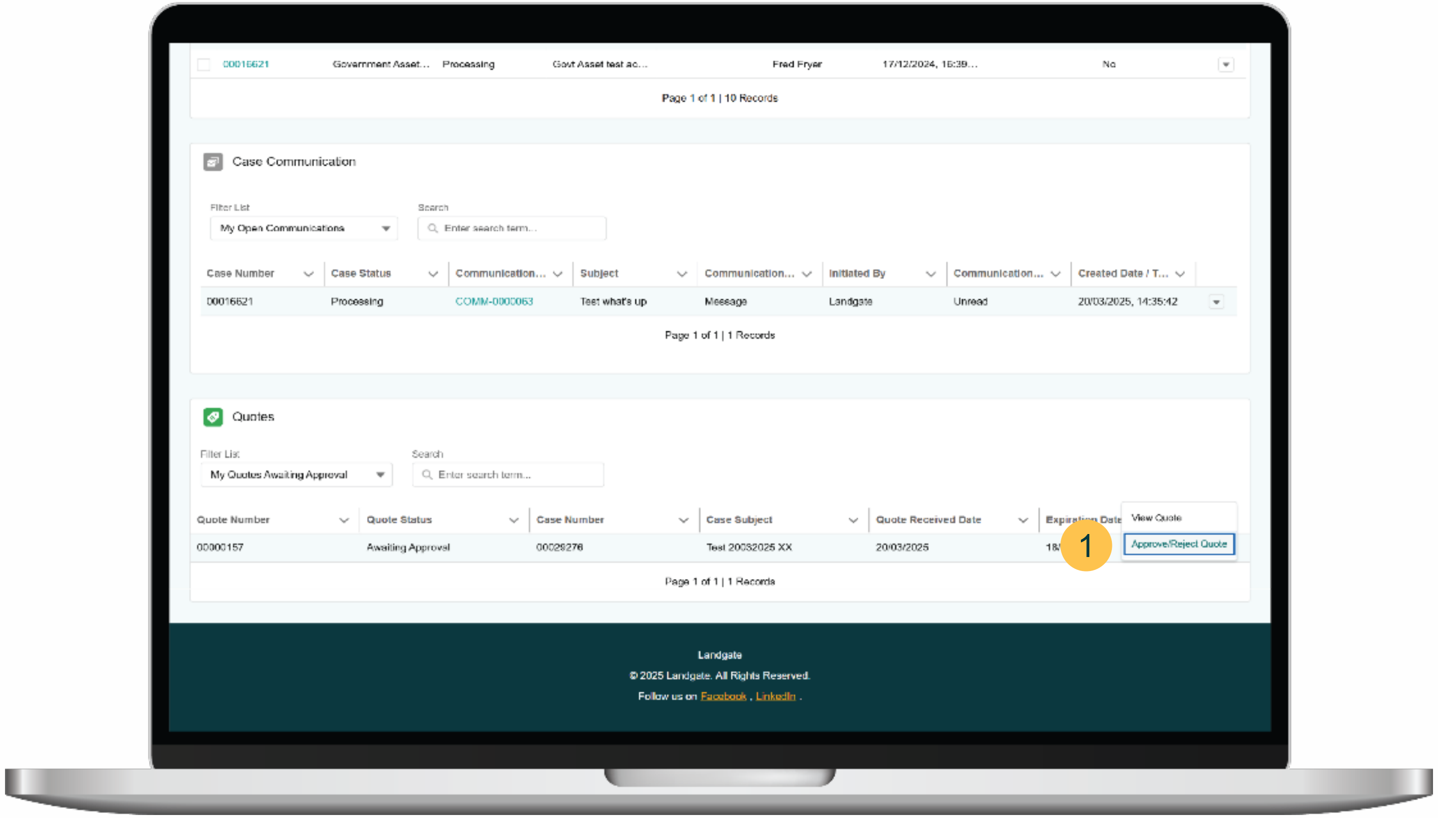
1 Click on “Download” to save a PDF formatted quote to the local drive.



Quotes – complete action

1. From the Quotes list, the case contact can complete the action to approve or reject the quote.

   This action is no longer available if the quote has expired. A quote will expire in 182 days (approx. 6 months). Once expired, the quote will be moved to “My Completed Quotes” with a status of Expired.

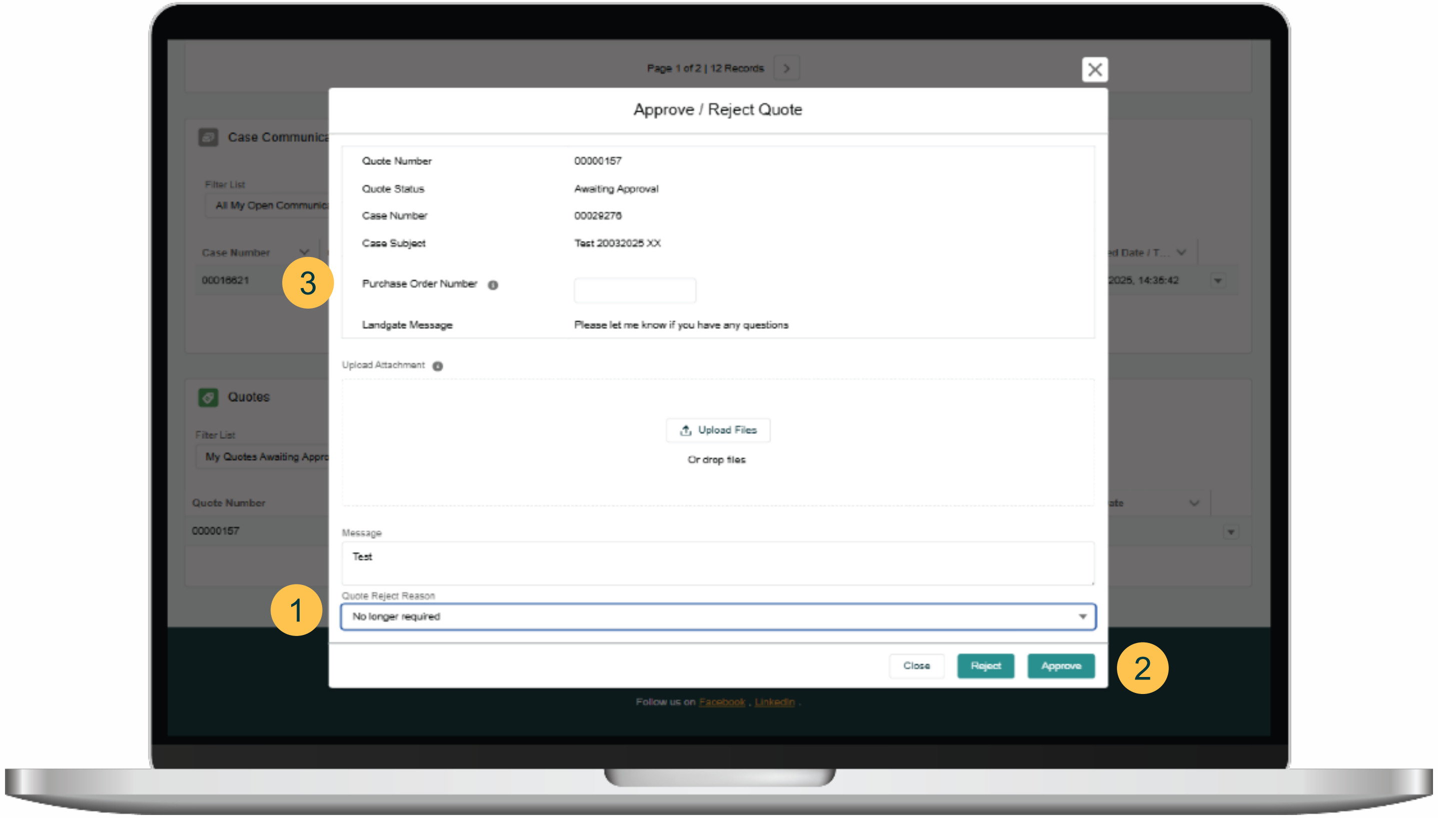


Quotes – approve/reject

1. **Rejecting the quote** will require the user to select a rejection reason. Case will be immediately closed.

2. **Approving the quote** will notify Landgate to action the job required. Progress of the case can be followed by monitoring the case status in the Cases list.

3. User can provide the purchase order number and any attachment(s) when submitting an approval.



Value

Client Portal Property Search

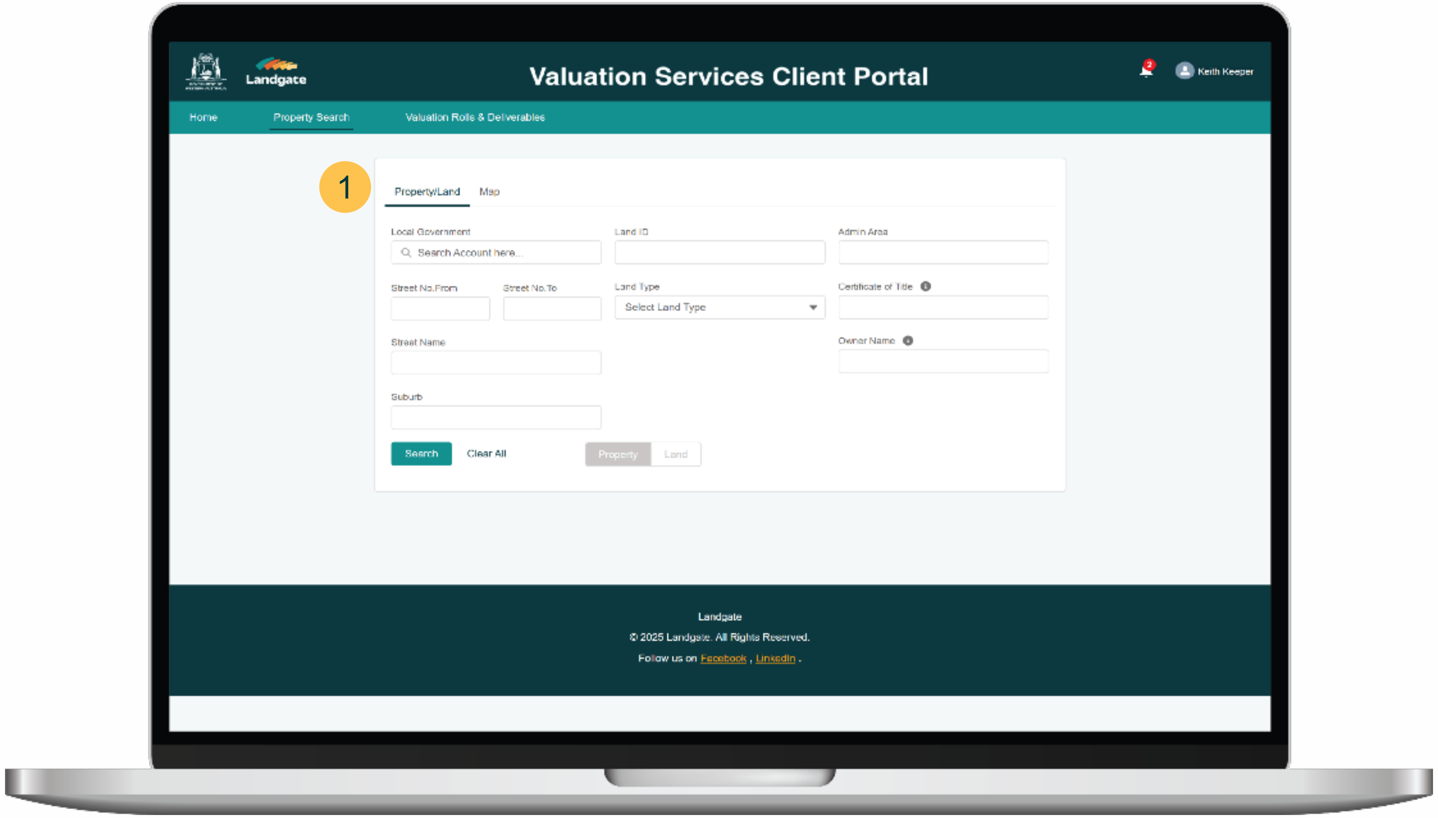
Property Search - options

1 Clicking on **Property Search** will provide users the ability to search using:

- Property/Land details
- A map view

Search results and displayed information will correspond to matched VENs. VENs with no active Client will not be returned.

Property Search can also be accessed by users when they have clicked the **Go to Property Search** link when completing a new request form.



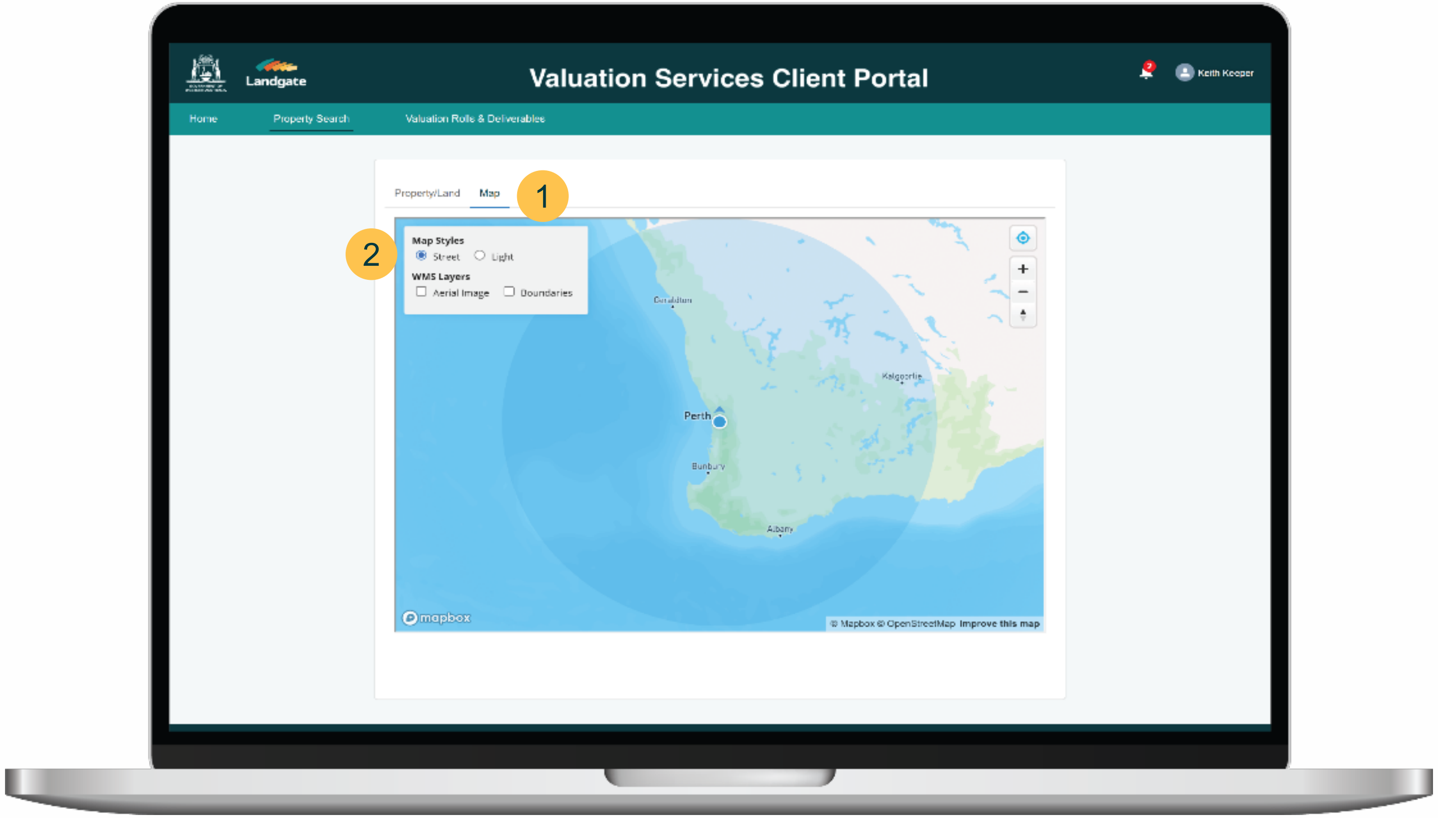
Note: A "Client" refers to the agency with a current interest in the property's valuations.

Map search

1. Users can search using a **Map.** Navigate to a location and add a pin to a property.

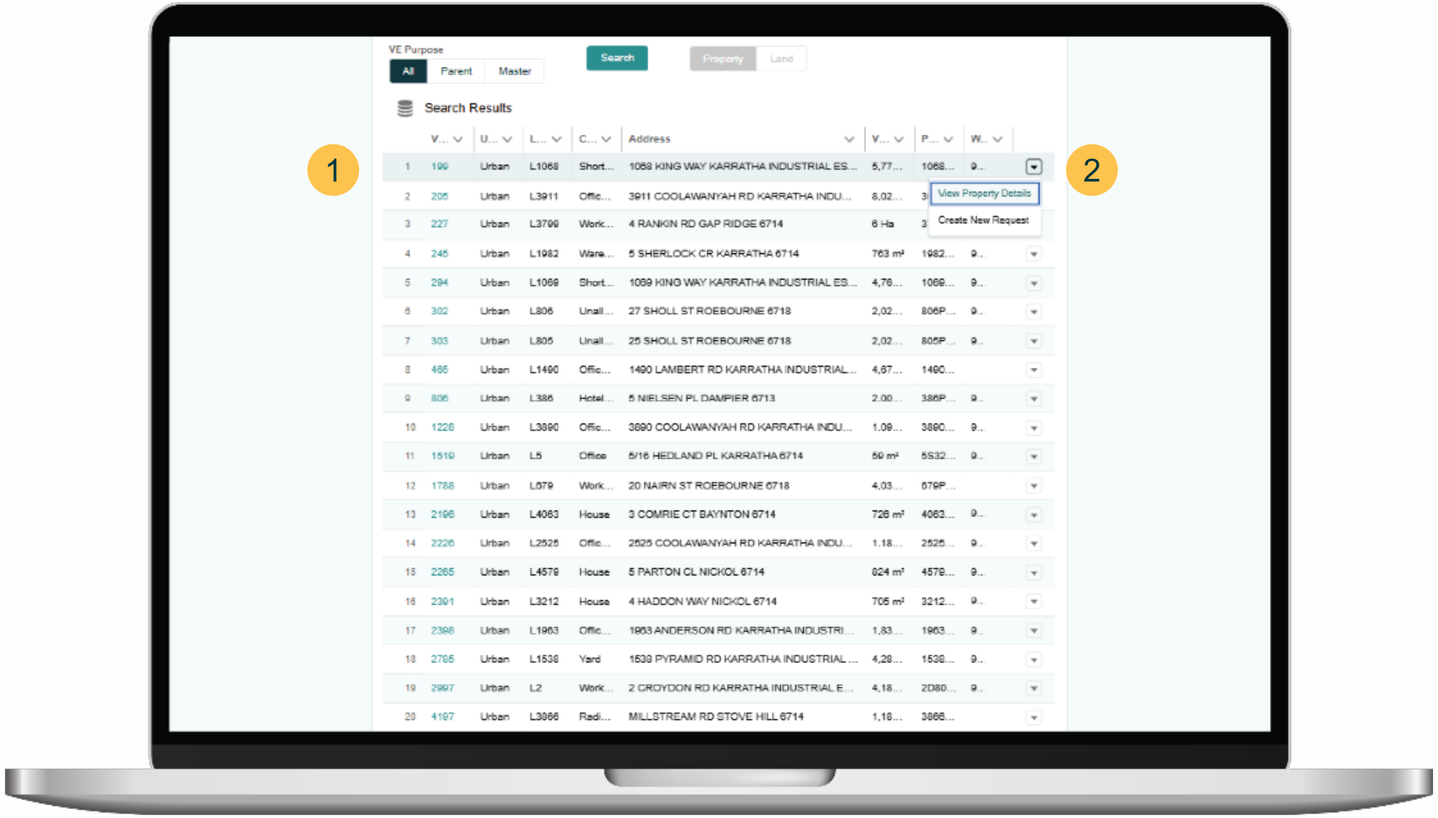
   A list of properties associated with the selected point will be displayed in the search results.

2. The map can be configured in the following ways:
   - Map style - Street or Light
   - WMS Layers - Aerial Imagery and/or Cadastre Boundaries (containing street numbers)



Property search results

1. Property search results will be ordered by VEN.
2. On the right side of the table is the **actions menu**.
   - View Property Details – this will navigate the user to the Property Summary page to show the details of the selected property
   - Create New Request – property details will be populated over to the new request form selected



Value

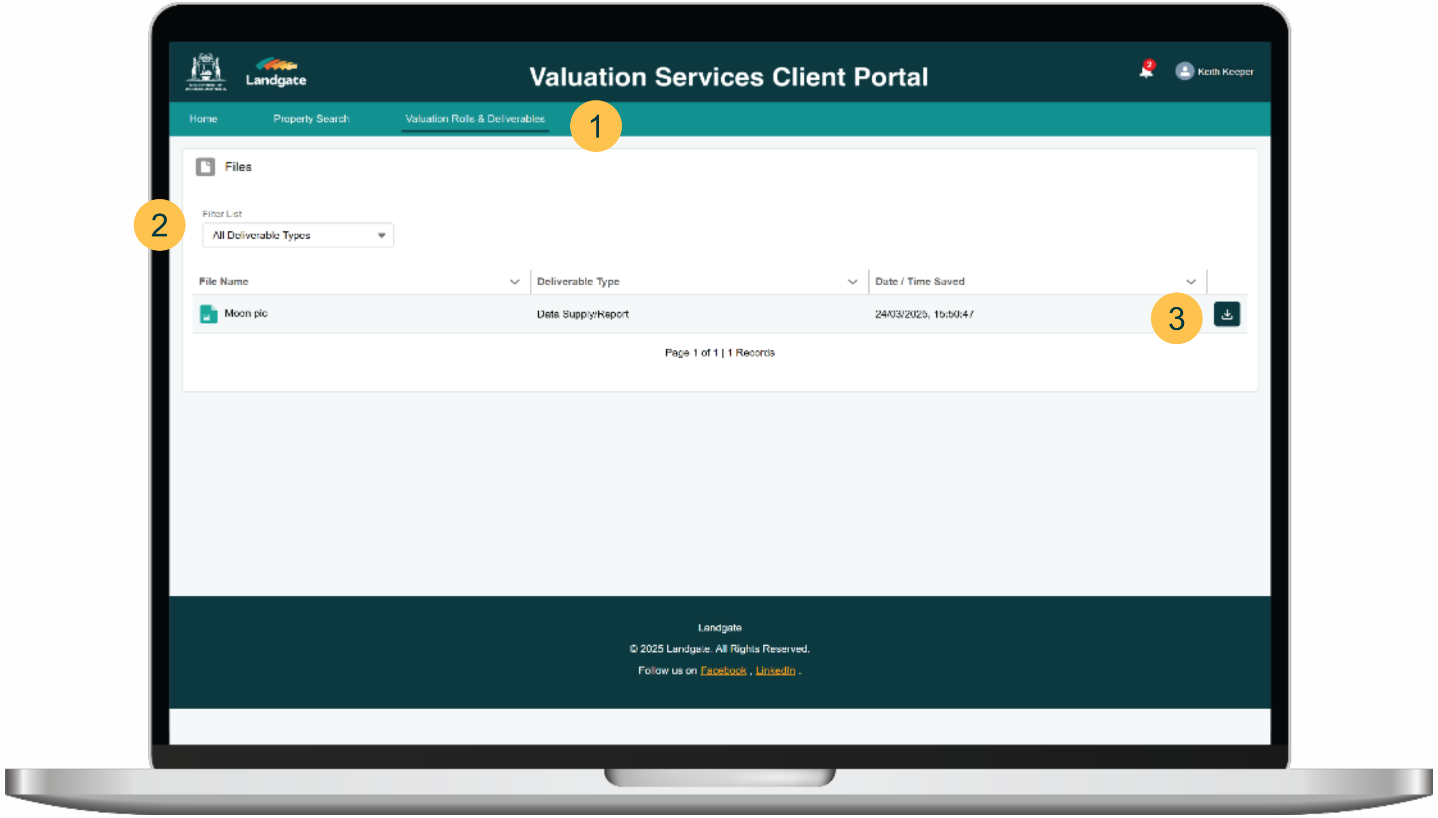
Client Portal – Valuation Rolls and Other Deliverables

Valuation Rolls & Other Deliverables

1. Users can view the list of files uploaded by Landgate for their agency relating to Valuation Rolls and other ‘Valuation Services’ deliverables.
2. Files are categorised by a deliverable type. User can filter on a deliverable type to find a specific file.
3. Files can be downloaded by selecting the download button.

Users will receive a notification when a deliverable has been uploaded by Landgate, as long as they have updated their profile to receive these notifications.

Files are archived and no longer viewable online 6 months from the date saved.



GOVERNMENT OF WESTERN AUSTRALIA

Landgate

Client Portal

Government Agencies

Administration Users Only

Locate Value Secure Enable

Landgate.wa.gov.au

Value

Administrators – Self-Management of User Profiles

Value

The Role of an Administrator

The role of an administrator is to assist with user access and management for individuals within their agency who require access to the Valuation Services Client Portal. Any actions taken by the administrator are implemented instantly, ensuring both security and efficiency.

Administrative capabilities include:

- Registering and deactivating users
- Updating user profiles and access permissions
- Resetting user passwords and reactivating accounts
- Performing other key administrative tasks to support portal use

Note: Generally, all users can update their own profile, reset their own password or reactivate their account

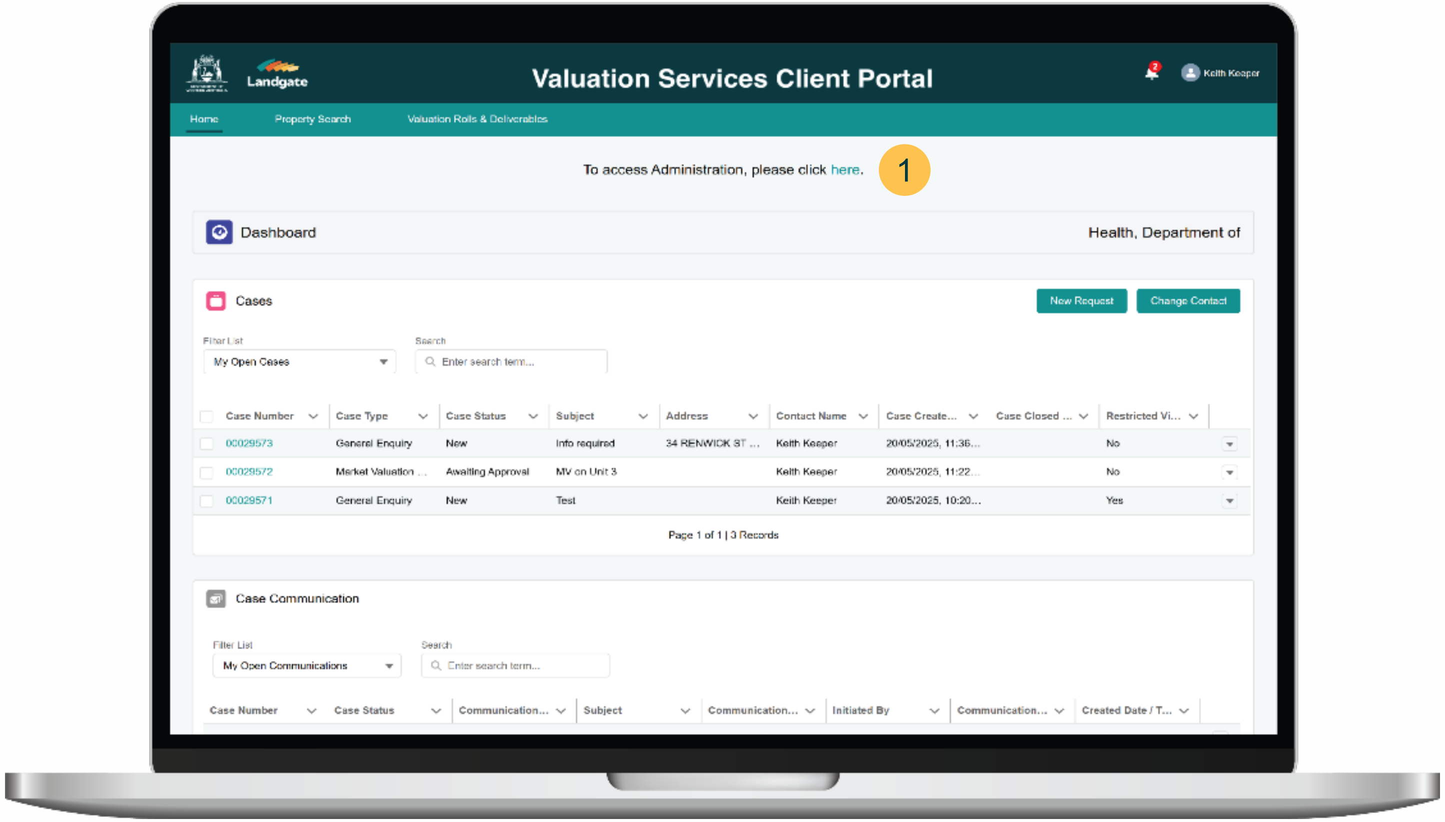
Number of Administrators

Each agency must maintain **at least two administrators**. You should also consider having administrators that can support specific departments/business teams.

This ensures continuity—if one administrator is unavailable (e.g. due to leave or illness), the other administrators can support users with any required actions, to ensure account access is maintained and up-to-date for your agency.

Accessing Client Portal as an Administrator

1. Users that have the role of an Administrator will have an **Administration** option. Clicking on the link will open Administration dashboard.



Administration – dashboard

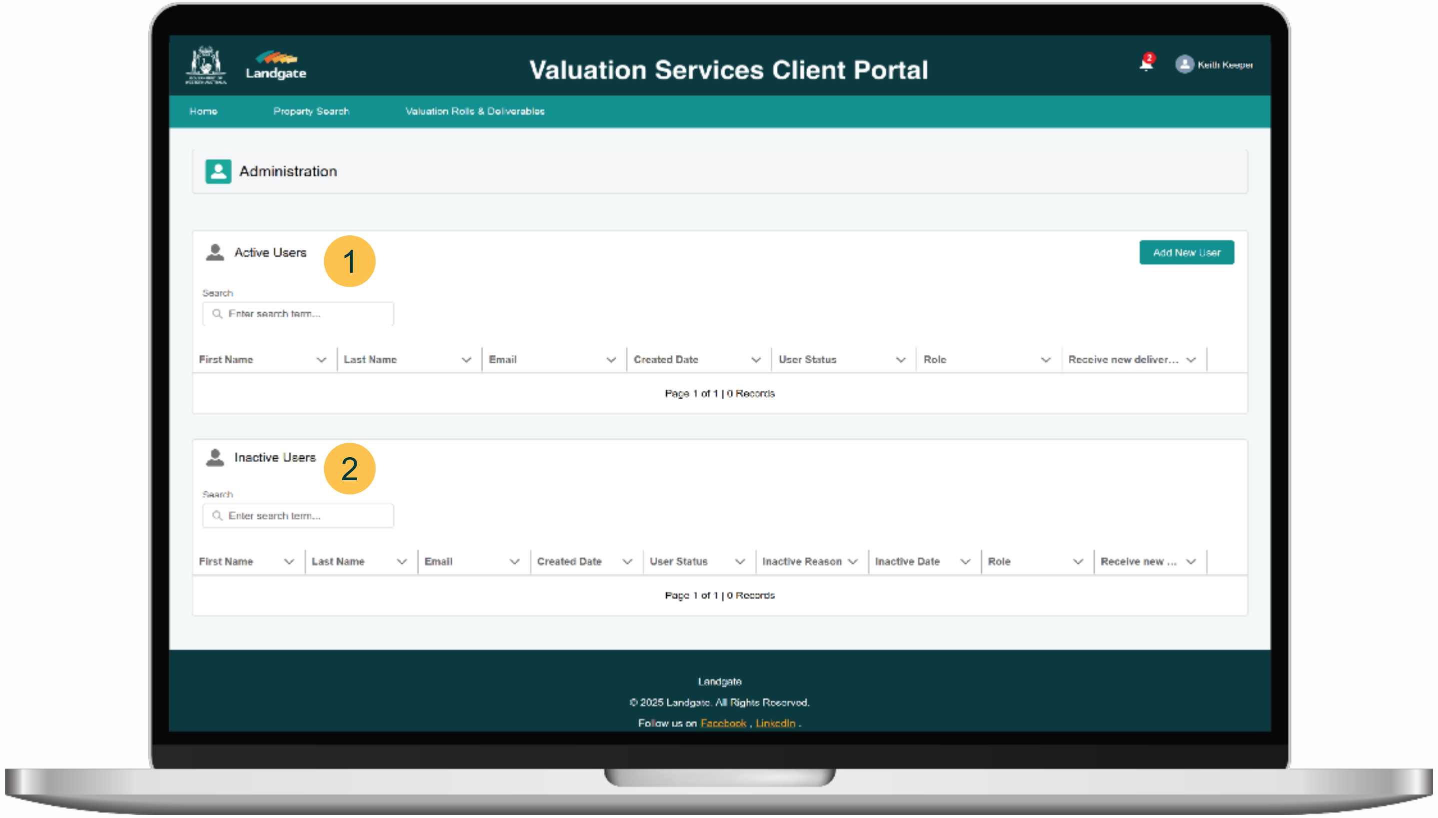
Administrator dashboard displays:

1
- Active users in the agency
- Inactive Users in the agency

2 Inactive Users have had their account deactivated:

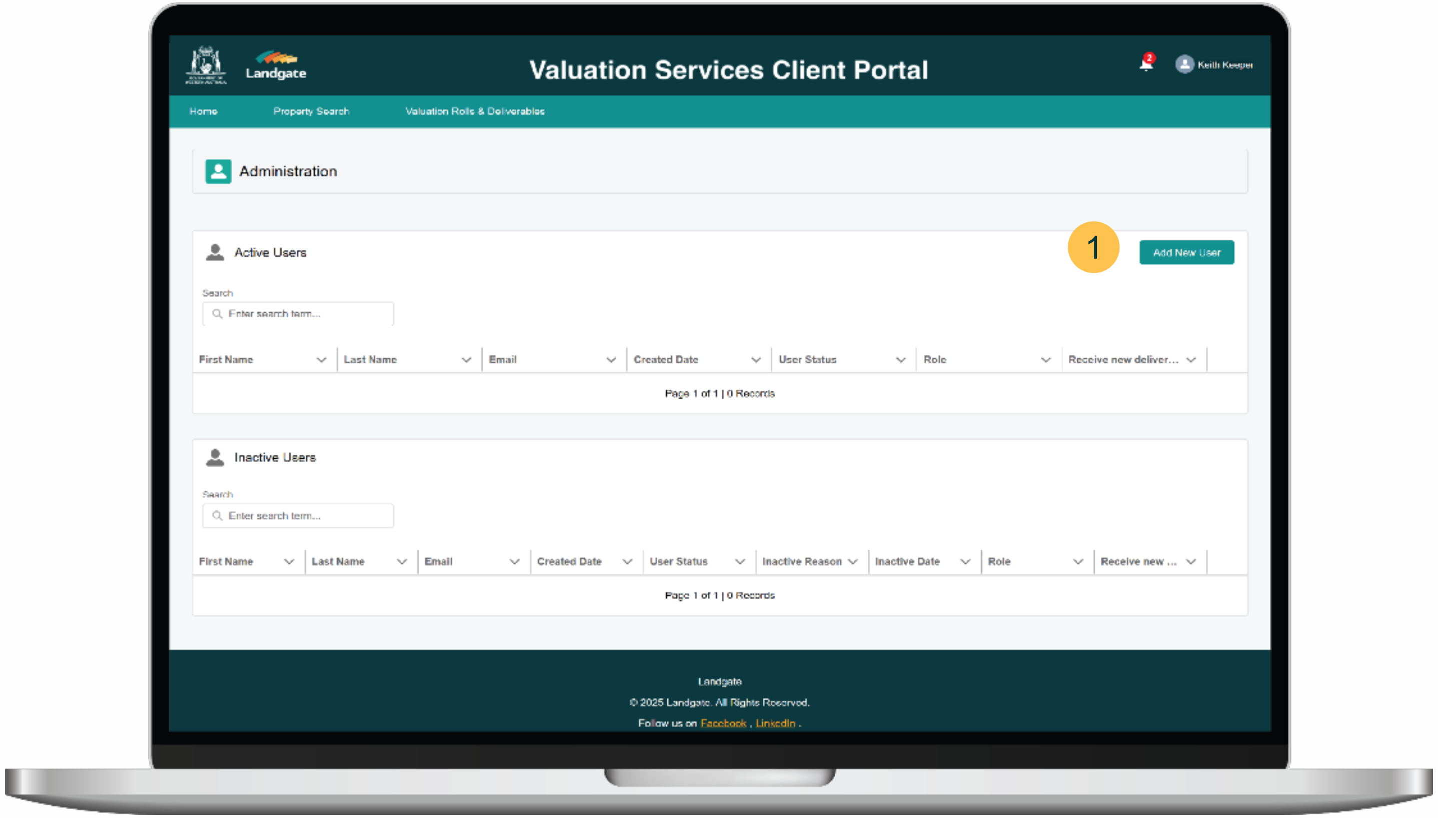
- due to their account being inactive for 90 days; or
- by an administrator at the agency or Landgate

Users are prompted at 75 days to maintain their account to ensure their account is not deactivated. Users can also reactivate their own account.



Administration - create a new user

1. In the Administration dashboard, click **Add New User** which will launch a pop up form.



Administration - create a new user

Administrator enters the details of the new account user.

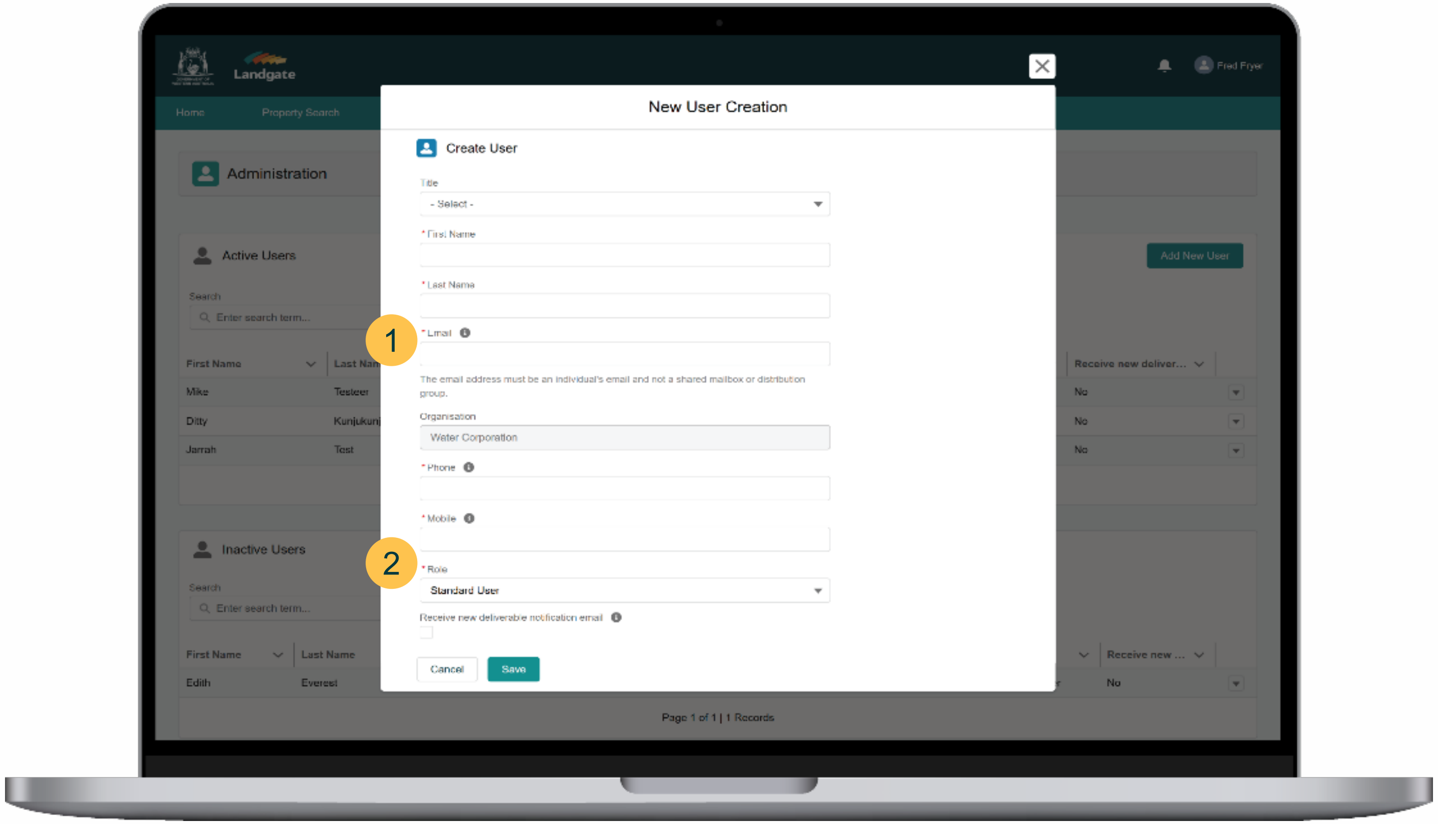
1 The email domain must match the user’s organisation. External email addresses, shared mailboxes and distribution groups are not allowed.

Duplicate emails are checked automatically.

If the user’s email exists already in Landgate’s CRM but is not a current Client Portal user, a prompt will appear to confirm the details and proceed with granting access to the portal.

2 The **Role** field is to assign either Standard or Administrator access.

A welcome email is sent to the new user to establish their password.



Value

Administration - edit user accounts

Administrators can maintain user profiles through the action menu.

For Active Users:

1. **Edit details** – all user details can be updated except for ‘organisation’.
2. **Reset Password** – the user will receive an email to start the password update process.
3. **Deactivate user** - to prevent the user account being used from logging in to the portal.

For Inactive Users:

4. **Activate user –** a prompt will appear requesting confirmation that the account is to be reactivated.