User Guide: Register the council, add and manage users

IPART's LG Portal allows councils to:

- upload applications and supporting materials for certain IPART reviews

- view and respond to IPART requests for information (RFIs)

Councils must use the LG portal to:

- submit applications for Special Variations to rates and Minimum Rate increases (see guidance on applying); and

- submit Developer Contributions Plans for review (see guidance on applying)

We may require other uses of the portal from time to time.

To access the portal, a council first needs to register and create at least one Council Admin account. The Council Admin can then add as many users as they'd like from the organisation.

1.1   Getting started

The LG Portal can be accessed via our website, or here: https://ipart.service-now.com/lg

You must contact IPART to register the council and set up the first 'Council Admin' account. You can:

- Email localgovernment@ipart.nsw.gov.au with below details:
    — Council name
    — Name and Email address for the 'Council Admin'
    — Job title
    — Phone number

- Or Call (02) 9113 7730

IPART will create the account. You will receive .an email from the portal with log-in details asking you to reset your password before first log-in.

1.2   User types

The 'Council Admin' can add other staff members as users. Additional users can be granted full access as an additional Council Admin, or be a 'standard user' with access to certain functions only (e.g. special variations, contributions plans), as set out below.

Council Admins

There can be multiple Council Admins. A Council Admin can:

- create and manage new users
- access all the applications in the portal from that council
- add and remove the council contacts or change their access.
- view and submit applications and respond to RFIs

Standard Users

Standard users should be assigned to one or more functions, such as special variations or contributions plans. They can:

- submit applications for their function/s
- track the status of applications submitted by them and other members of the same function group
- view and respond to RFIs
- update their own contact information.

1.3   Creating a new user

A Council Admin should follow the steps below to create new users. If needed, also see our guide *Navigating the Portal*.

1. In the portal, select 'Create Contacts' from the taskbar.
2. Fill in the required details for the new user. Tick the 'Password needs reset' box. After the new user role is created, the new user will be prompted to reset their password.
3. If creating a 'Standard User', select at least one function for them to access.
4. After selecting the function, 'Start' and 'End' dates will appear below it. This refers to the time period the person will have the access. The start date will default to the current date but can be edited. You may enter an end date.
5. Once the new account is created, you will see pop up confirmation message/s at the top of the screen outlining the role/s created (see example →).
6. The new user will receive an email with instructions on how to access the LG Portal, including the password reset process.
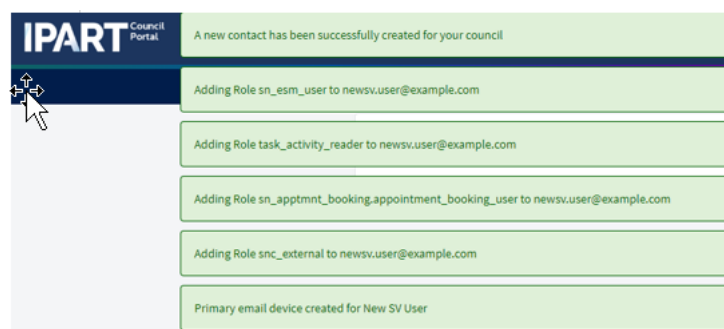
## 1.4   Viewing or editing a council user

Council Admins can amend all council users' access, including to:

- update the functions they can access

- change the access start and end dates

- 'deactivate' a user. Council Admins are not able to delete a user but can make them 'locked out' (see screenshot below).

A standard user can view all users within their function group but only edit some of their own details.

Follow the steps below to **view and edit** the council users:

1.   Select 'Council Details' from the top navigation bar

2.   Scroll to the bottom of the page, on the left you will find a 'Contacts' link (see screenshot). This should load a page where you will be able to view all contacts for your council
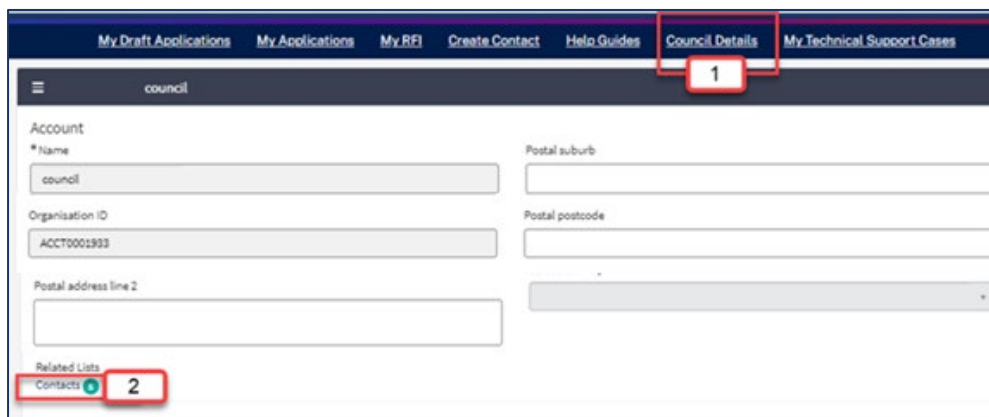
3.   Click on the contact you want to edit; you will have options to edit the user's functions (it may take some time to load)

4.   **To remove all access:** enter the username then un-tick 'Active' and select 'Save', This will lock the account for that user.

    The account can be reactivated by the Council Admin, by ticking the 'Active' checkbox and 'Save'.

5.   Use the tick boxes and drop-down lists to edit other access (see screenshot below)

☐ Council Admin   ☑ Council Standard

☑ All

☑ Special Variation

* SV Start Date   SV End Date

| 17-10-2023 | 📅 | | DD-MM-YYYY | 📅 |

☑ Contributions Plan

* CP Start Date   CP End Date

| 17-10-2023 | 📅 | | DD-MM-YYYY | 📅 |

☑ Cost Index Survey

* CIS Start Date   CIS End Date

| 17-10-2023 | 📅 | | DD-MM-YYYY | 📅 |

☐ Council Admin   ☑ Council Standard