

Table of Contents

Section	Page
1 ABOUT THIS USER GUIDE	4
1.1 Purpose	4
1.2 Intended readership.....	4
1.3 How to use this guide	4
1.3.1 User guide structure.....	4
1.3.2 Layout.....	5
2 INTRODUCTION TO LANDONLINE	8
2.1 Overview	8
2.2 Getting started in Landonline	8
2.2.1 Log on to Landonline.....	9
2.2.2 Select your firm and licence	10
2.3 Using Landonline Help.....	10
2.3.1 Displaying Help.....	10
2.3.2 Help contents and structure.....	11
2.3.3 Navigating Help.....	11
2.3.4 Finding Information in Help	12
2.3.5 Printing Help.....	12
3 WORKSPACE.....	13
3.1 Overview	13
3.2 Workspace screen	13
3.2.1 Workspace Toolbar.....	15
3.2.2 Workspace Tree	16
3.2.3 Workspace Detail panel.....	17
3.2.4 Login security check.....	17
3.2.5 Firm's credit	17
3.2.6 Workspace Toolkit.....	18
3.3 View, save or print TA <i>e-certification</i> work information	18
3.3.1 Refresh Workspace.....	18
3.3.2 View details of a TA <i>e-certification</i> work	19
3.3.3 Save TA <i>e-certification</i> work information.....	20
3.3.4 Print survey information	21
3.3.5 View, save or print a TA Certification work Toolkit.....	21
3.4 Find TA <i>e-certification</i> work.....	22
3.4.1 Display the Find TA Certification Work screen	22
3.4.2 Search for the TA <i>e-certification</i> work.....	22
3.4.3 Find TA Certification work Toolkit.....	24
3.5 Types of messages	24
3.5.1 User generated messages	24
3.5.2 System generated messages.....	24
3.6 Messages tab.....	25
3.6.1 Using the Messages tab	26
3.6.2 Using the Messages tab Toolkit.....	28
3.7 My Messages	28
3.7.1 Using the My Messages folder	29
3.7.2 Print a message from My Messages.....	31
3.7.3 Delete a message from My Messages.....	32
3.7.4 Using My Messages Toolkit.....	32
3.8 Change your details or password.....	32
3.8.1 Change your details	33

Landonline – TA e-certification User Guide

3.8.2	Change password	40
4	SEARCH FOR A USER OR A FIRM	42
4.1	Overview	42
4.2	Search for a user or firm	42
4.2.1	Display the External Search screen	42
4.2.2	Search for a user or firm and add the details to the current screen	43
4.3	Searching tips	44
4.3.1	Wildcards	44
5	TA <i>e-certification</i>	46
5.1	Overview	46
5.2	Search for TA <i>e-certification</i> work in Landonline	48
5.2.1	Display the TA Certification screen	48
5.2.2	Search for the TA <i>e-certification</i> work	49
5.2.3	Search for TA Certification work in Landonline Toolkit	51
5.3	Assign TA <i>e-certification</i> work to a user	51
5.3.1	Select the TA <i>e-certification</i> work to assign	51
5.3.2	Assign the work to a TA user or contractor	52
5.3.3	Enter the TA Reference	52
5.3.4	Assign TA Certification work to a user Toolkit	52
5.4	Place TA work on hold and remove TA work from on hold	52
5.4.1	Place a TA <i>e-certification</i> work on hold	53
5.4.2	Take a TA <i>e-certification</i> work off hold	53
5.5	Create an Annotation	53
5.6	View plan images	54
5.6.1	Display the TA View Plan screen	55
5.6.2	View Title and Survey Plan images	56
5.6.3	Print from the TA View Plan screen	58
5.6.4	Save an image to a file	58
5.7	Prepare certificate packages	59
5.7.1	Display the Manage TA Certification screen	59
5.7.2	Add and customise certificates	60
5.7.3	Create an additional package	63
5.7.4	Rename a package	64
5.7.5	Delete a package	64
5.7.6	Prepare certificates packages Toolkit	64
5.8	Attach TA supporting documents	65
5.8.1	Display the Supporting Documents tab	66
5.8.2	Attach a supporting document	67
5.8.3	Edit or add comments for a supporting document	68
5.8.4	Overwrite a supporting document	68
5.8.5	Delete a supporting document	68
5.8.6	Attach supporting documents Toolkit	68
5.9	Certify and sign	69
5.9.1	Certify a certificate	70
5.9.2	Sign a package	71
5.9.3	Certify and sign Toolkit	72
6	SYSTEM MANAGEMENT	73
6.1	Overview	73
6.2	External System Administration screen	73
6.2.1	Display the External System Administration screen	74
6.3	View an individual user's details	74
6.3.1	Display the Maintain User screen	75
6.3.2	Search for the user	75
6.3.3	View user contact details and preferences	76
6.4	Modify your firm's contact and user details	76

Landonline – TA e-certification User Guide

6.4.1	Display the Maintain Firm screen.....	77
6.4.2	Modify firm details in the Details tab.....	77
6.4.3	Modify user details for the firm.....	78
6.5	Maintain user privileges in your firm.....	78
6.5.1	Display the Maintain Firm screen.....	78
6.5.2	Display the Allocate Privileges screen.....	79
6.5.3	Allocate or remove privileges.....	80
6.6	Modify user groups.....	81
6.6.1	Display the Maintain Groups screen.....	81
6.6.2	Create a new user group.....	82
6.6.3	Modify a group name or description.....	82
6.6.4	Assign and remove users.....	83
6.6.5	Add privileges to, or remove privileges from a group.....	83
6.6.6	Delete a user group.....	84
6.7	Disassociate a user from the firm.....	84
6.8	Generate a Licence usage report.....	84
6.8.1	Display the Licence Usage Report screen.....	85
6.8.2	Generate a Licence Usage Report.....	85
6.8.3	Print the Licence Usage Report.....	85
6.8.4	Save the Licence Usage Report.....	86
6.9	System Management Toolkit.....	86
APPENDICES.....		87
Appendix A: TA View Plan screen Function Menu options.....		87
Appendix B: Details of generated plans.....		89
	CSD Plan pages.....	89
	Title Plan pages.....	89
	Title Diagram pages.....	89
Appendix C: TA <i>e-certification</i> supporting document types.....		90
Appendix D: TA <i>e-certification</i> status.....		91
Appendix E: TA <i>e-certification</i> package and certificate status.....		92
	Certificate status.....	92
	Package status.....	92
Appendix F: TA Certification screen information.....		93
	TA Certification screen.....	93
	TA Certification tab.....	93
	Annotations tab.....	94
	Supporting Documents tab.....	94
Appendix G: Manage TA Certification screen.....		95
Appendix H: Other TA <i>e-certification</i> screens.....		96
	Find TA Certification Work screen.....	96
	Record Supporting Document screen.....	96
	Sign TA Certification screen.....	97