



# **CONSTRUCTION TRAINING FUND PORTAL GUIDE FOR ALL USERS**

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## ACCOUNT MANAGEMENT

The My Account section allows you to:

- update personal settings;
- change password;
- Add Users

As the system administrator\* you are able to activate and deactivate users.

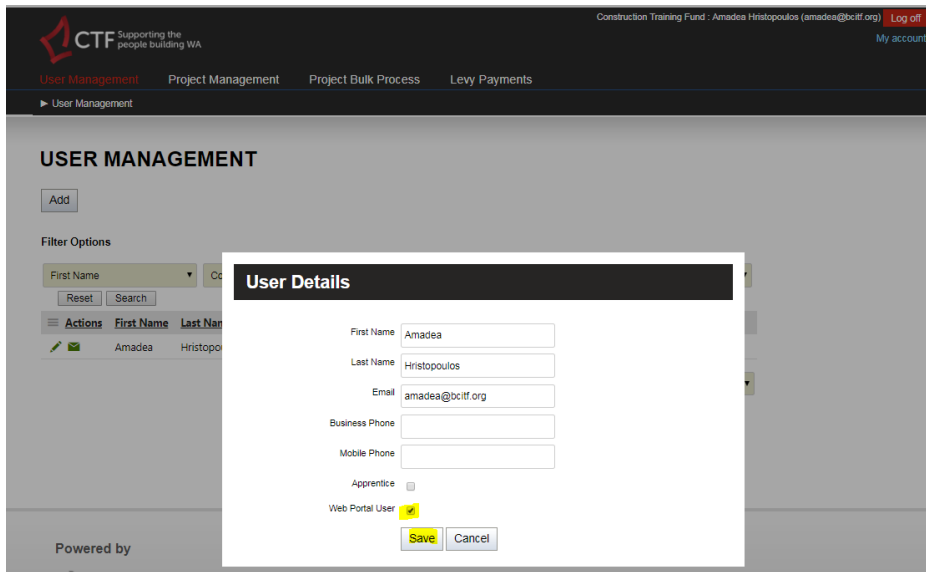
*\*Please contact CTF if you are not currently the System Administrator and require it to be changed.*

### *Additional Users*

Additional users with Web Portal access will be able to add, view and pay levies on behalf of the company.

### *Removing a User*

User Management > click pencil of User you want to edit > uncheck Web Portal User to deactivate



The screenshot displays the CTF web portal interface. At the top, the CTF logo and tagline 'Supporting the people building WA' are visible. The user is logged in as 'Amadea Hristopoulos (amadea@bcctf.org)'. The main navigation menu includes 'User Management', 'Project Management', 'Project Bulk Process', and 'Levy Payments'. The 'User Management' section is active, showing a table of users. A 'User Details' modal form is open, displaying the following information:

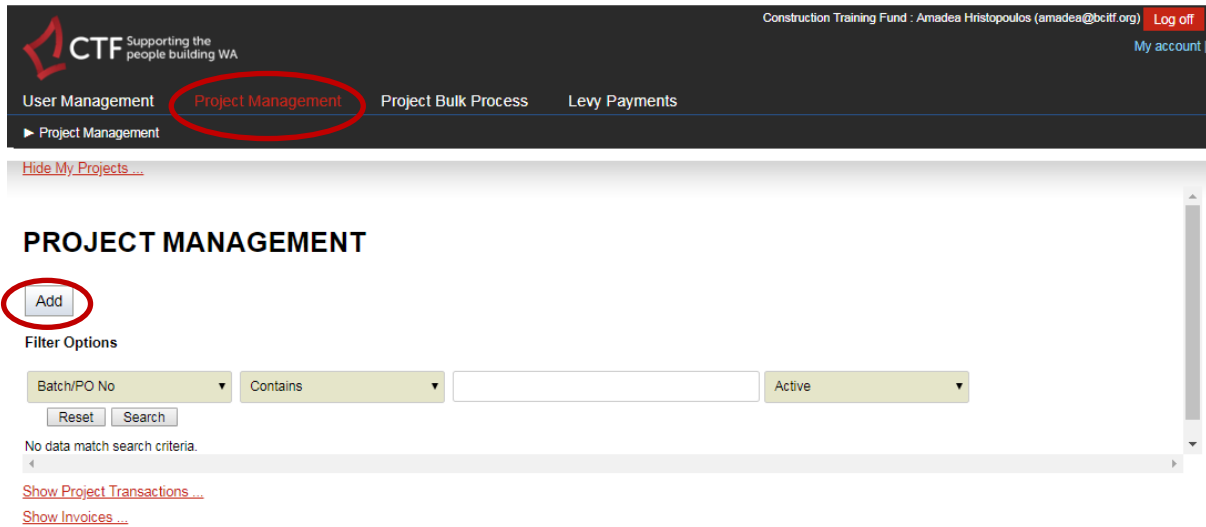
First Name	Amadea
Last Name	Hristopoulos
Email	amadea@bcctf.org
Business Phone	
Mobile Phone	
Apprentice	<input type="checkbox"/>
Web Portal User	<input checked="" type="checkbox"/>

At the bottom of the modal, there are 'Save' and 'Cancel' buttons. The background shows a table with columns for 'Actions', 'First Name', and 'Last Name', with one user entry visible: 'Amadea Hristopoulos'.

## INDIVIDUAL PROJECT MANAGEMENT

This feature allows users to create and pay single projects instantly

*PROCESS* > Go to Project Management Tab > click Add



The screenshot shows the CTF web application interface. At the top, the CTF logo and tagline "Supporting the people building WA" are on the left, and the user's name "Construction Training Fund : Amadea Hristopoulos (amadea@bciff.org)" and "Log off" link are on the right. Below this is a navigation menu with "User Management", "Project Management" (circled in red), "Project Bulk Process", and "Levy Payments". Under "Project Management", there is a sub-menu with "Project Management" (indicated by a right-pointing triangle). Below the navigation is a "Hide My Projects ..." link. The main content area is titled "PROJECT MANAGEMENT" and contains an "Add" button (circled in red). Below the "Add" button are "Filter Options" including a "Batch/PO No" dropdown, a "Contains" dropdown, a search input field, and an "Active" dropdown. There are "Reset" and "Search" buttons. Below the filters, it says "No data match search criteria." At the bottom, there are links for "Show Project Transactions ..." and "Show Invoices ...".

The *minimum set of data* required to submit a project and have a payment request raised for it is:

- Batch / PO No (pre-populated)
- Project No.
- Street 1
- Suburb
- Issuing Authority
- Expected Date of Commencement
- Value of Works
- Levy Sector

*PROCESS > Enter data in left hand column > click Save*

Project

Batch/PO Number\*

Project No\*

Lot Number

House Number

Street 1\*

Suburb\*

Postcode

State

Project Title

Main BCA Class

Government Contract

Contract Ref No

Description of Works

Issuing Authority\*

Expected Date of Commencement\*

Expected Date of Completion

Value of Works\*

Levy Sector\*

Levy Activities

Levy Categories

Project Builder (PO)

Builders Registration Number

Levy Payable By\*

Levy Base Construction

Levy Value

Levy Charged

Levy Received

Levy Balance

Estimated Levy Payable

Project Owner

Project Status

Project Stage

Save

Cancel

## VIEWING

The newly created project will appear in the view table

### Filter Options


Project Title  Contains

Actions	Batch/PO No	Project No	Project Title	Issuing Authority	Project Builder (PO)	Project Stage
	Const070720181011		CTF Project	City of Bayswater	Construction Training Fund	Not billed

## PAYING THE PROJECT / PROJECTS

*Process* > Go to Levy payments > Adjust filters to enable viewing of project > search

See payment methods for payment options


Supporting the people building WA
Construction Training Fund - Amadea HR

User Management Project Management Project Bulk Process Levy Payments

▶ Levy Payments

[Hide My Payments ...](#)

## PAYMENTS

### Filter Options

Request  Contains

Actions	Request	Name	Total Amount	Status
	INV-01004-S5T0G2	CTF Project - Levy Request Const070720181011	200.0000	New

PROCESS > Click eye > click Show Payment Section link > select payment type

## PAYMENTS

### Filter Options

Request  Contains  Pending

Actions	Request	Name	Total Amount	Status
<input type="checkbox"/> <input type="checkbox"/>	INV-03840-G4G9H0	SOUTH FLANK PROJECT - Levy Request SOUTHFLANK1	1600.00	New
<input type="checkbox"/>	INV-02140-J7C6Z1	Test Project Import 1 - Levy Request 123456	1800.00	Received At FFO
<input type="checkbox"/> <input type="checkbox"/>	INV-02141-N0Z4Y8	Test Project Import 2-1 - Levy Request 123456-2	700.00	Received At FFO
<input type="checkbox"/> <input type="checkbox"/>	INV-03844-Z2S8N4	CITYOFSWAN-AU2018 - Levy Request CITYOFSWAN-AU2018	78347.36	New

Items per page 25

[Hide Batch Projects ...](#)

## PROJECTS

Request **INV-03840-G4G9H0 SOUTH FLANK PROJECT - Levy Request SOUTHFLANK1**  
 Projects Total 1600.00

Actions	Batch/PO No	Project No	Project Name	Levy Charged	Levy Received	Levy Balance
<input type="checkbox"/>	SOUTHFLANK1	123456	SOUTH FLANK PROJECT	0	0	1600.00

Items per page 25

[Hide Payment Section ...](#)

Credit Card Payment


EFT Payment (Bank Transfer)

See [Methods of Payment](#) for payment type processes

## PROJECT BULK PROCESS FUNCTION

The Bulk Process function allows external files to be uploaded to the CTF in order to remit multiple projects on one payment request

*PROCESS* > Go To Project Bulk Process


Construction Training Fund : Amadea Hristopoulos (amadea@ctf.wa.gov.au) [Log off](#)
[My account](#)

User Management
Project Management
Project Bulk Process
Apprenticeships
Employment
Program Claims
Levy Payments

▶ Project Bulk Process

**STEP 1 OF 4**

File requirements:

- Only file with these extensions will be accepted. .csv, .txt, .xls and .xlsx
- Please note that the Portal expect the first row to be the column headers. It will be used to perform header mapping in Step 2
- Your file has to contain only plain text value and not macros or formulas
- For Excel file, only spreadsheet named Sheet1 will be extracted
- The values in the file should not contain sub-totals or totals rows
- Upon clicking "Upload" button, your file will be read by the Portal. A grid will be shown with the data uploaded. Please validate the data in the grid.
- At any point of time, if you are not sure, please **DO NOT** proceed with the file upload procedure and contact CTF Office

### STEP 1: UPLOAD FILE

 No file chosen

Upload status:


### UPLOAD FILE

*PROCESS* > Select file for upload > click Upload button (file summary to be shown) > click next

### STEP 1: UPLOAD FILE

 No file chosen

Upload status: File uploaded!

Govt Issued Contract?	Govt Authority Contract Issued By	Govt Contract Number	BATCH REFERENCE	Levy Type	Levy Reference Number	Property Lot	House No	Property Address	Property Suburb	Property State	Property Postcode	Comp Name
lead_govcontract	lead_govcontractissuedby	lead_govcontractnumber		levy_type				lead_companyaddress3	lead_companycity	lead_companystate		PO_cc
		BAC18/0271	10733A	NEW	1199512	13	3314	Caves Road	WILYABRUP	WA	6282	Sarum Holdings
		BAC18/0281	10733A	NEW	1194413	147	7	Dotterell Crescent	GEOGRAPHE	WA	6280	South Homes
		BAC18/0288	10733A	NEW		50	645	Vasse - Yallingup Road	ANNIEBROOK	WA	6280	Michael Simps

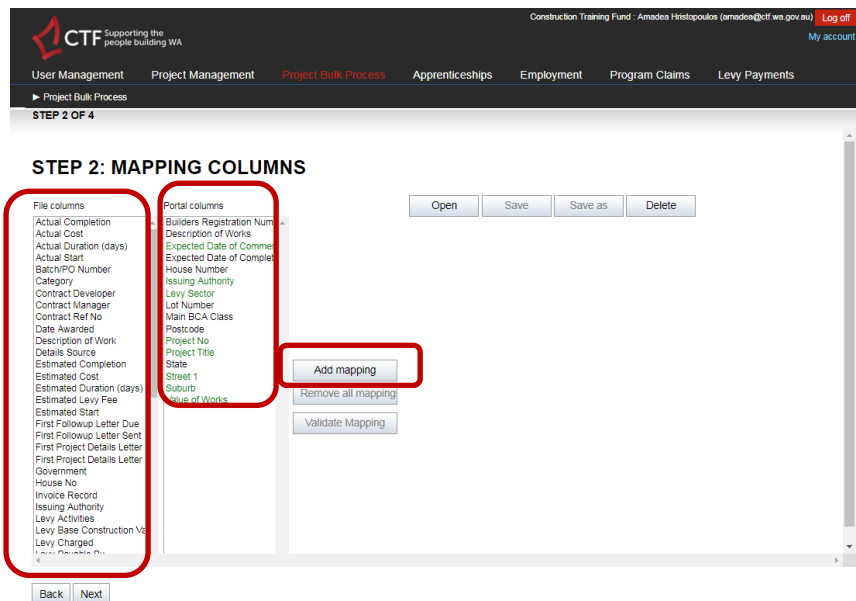


## MAPPING COLUMNS

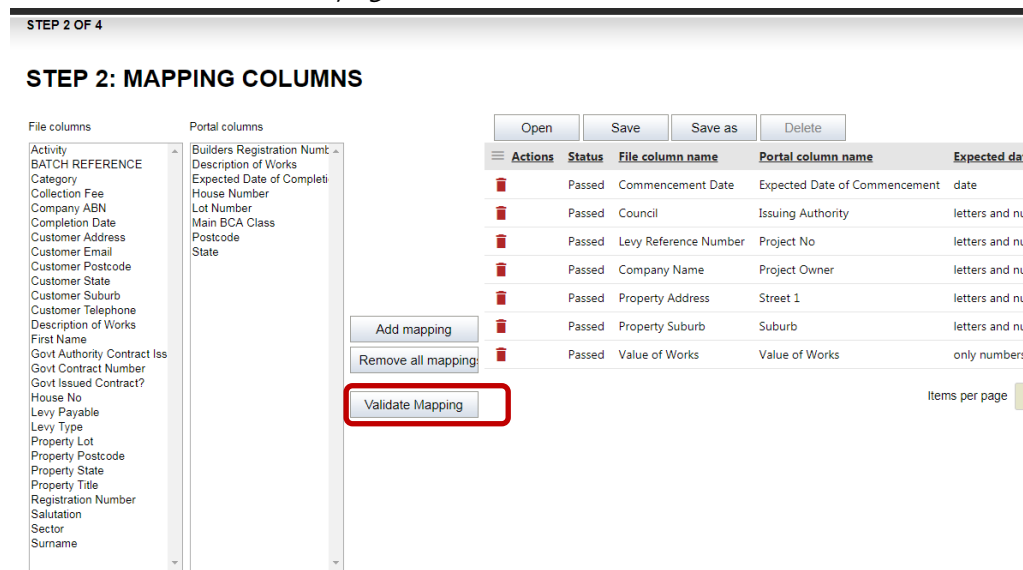
File Column fields are read from the first row in the file uploaded. Portal Columns are all the fields that can be mapped .

All green fields are mandatory and require data in each of these fields *\*upload will fail if there is no data in upload cells for mandatory fields\**

**PROCESS** > Select File column to map to Portal column. *As a minimum, map all green portal fields* > Select File column name > click Portal column to match > click add mapping



**PROCESS** > Click Validate Mapping > All Status should equal Passed. *If status for field = Failed, see trouble shoot page;* > click Next




Actions	Status	File column name	Portal column name	Expected data type
	Passed	Commencement Date	Expected Date of Commencement	date
	Passed	Council	Issuing Authority	letters and nu
	Passed	Levy Reference Number	Project No	letters and nu
	Passed	Company Name	Project Owner	letters and nu
	Passed	Property Address	Street 1	letters and nu
	Passed	Property Suburb	Suburb	letters and nu
	Passed	Value of Works	Value of Works	only numbers

## DATA VALIDATION

The portal will suggest actions for you to undertake based on potential matches in the system for existing project owners or asking to create a new value.

**PROCESS** > Click Check values > *validated column all equal to Yes* > click next



 Construction Training Fund : Amadea Hristopoulos (amadea@ctf.wa.gov.au) [Log off](#)

[User Management](#)
[Project Management](#)
[Project Bulk Process](#)
[Apprenticeships](#)
[Employment](#)
[Program Claims](#)
[Levy Payments](#)

▶ Project Bulk Process

**STEP 3 OF 4**

- Click "Check Values"
- List of data conflict will be shown on left column. Action is required for these items.
- Select an action if you would like the portal value to overwrite file column value.
- Please take note, the value for Issuing Authority must be the same as the existing value suggested in the Portal. Should the suggested Portal value be not relevant to your organisation, please contact CTF immediately. **\*\*Do not continue to upload the data\*\***
- New value for Project Owner can be accommodated. Upon completion of "Check Values", select an Action and click "Assign Values" button to proceed.

**STEP 3: DATA VALIDATION**

Values from uploaded file

Validated	Issuing Authority	Levy Sector	Estimated Cost	Estimated Start	Project No	Project name	Street 1	Sub
Yes	City of Stirling	Housing	128000	10/06/2018 12:00:00 AM	1210379	25	Princess Road	DOI
Yes	City of Stirling	Housing	152000	30/06/2018 12:00:00 AM	1210452	319	Tenth Avenue	ING
Yes	Town of Claremont	Housing	50000	3/07/2018 12:00:00 AM	1159915	2356	Scott Street	CLA
Yes	City of Stirling	Housing	190975	20/07/2018 12:00:00 AM	1212605	31507	Sylvia Street	BAL
Yes	City of Stirling	Housing	253155	22/06/2018 12:00:00 AM	1212557	32827	Grand Promenade	DOI
Yes	Town of Claremont	Housing	502654	6/07/2018 12:00:00 AM	1203739	150592	Mengler Avenue	CLA
Yes	City of Stirling	Housing	144900	26/06/2018 12:00:00 AM	1171244	172025	Dallington Crescent	BAL

Assign values
Check values

Back
Next

## PROCESSING

**PROCESS** > Click Process button

**STEP 4: PROCESSING**

Process

Upload status	Project Builder	Issuing Authority	Estimated Cost	Estimated Start	Pr
No	APH Contractors Pty Ltd	Construction Training Fund	130000	1/05/2018 12:00:00 AM	11'
No	Create value when saving record : Southern Built Homes	Construction Training Fund	478467	4/07/2018 12:00:00 AM	11'
No	Ventura Home Group P L T/A Smart Homes For Living Pty Ltd T/A Ventura Homes	Construction Training Fund	500000	10/07/2018 12:00:00 AM	BA
No	Create value when saving record : John Craig & Darryl King	Construction Training Fund	500000	1/08/2018 12:00:00 AM	11'
No	Create value when saving record : Sarah Wilson	Construction Training Fund	29000	1/07/2018 12:00:00 AM	11'
No	Create value when saving record : Peter Brown & Kellee Brown	Construction Training Fund	40000	13/12/2017 12:00:00 AM	11'
No	Create value when saving record : Bunbury Classic Pools	Construction Training Fund	24800	18/06/2018 12:00:00 AM	11'

Back

Once complete and if successful, upload status becomes Yes

### STEP 4: PROCESSING

Upload status	Project Builder	Issuing Authority	Estimated Cost	Estimated Start	Pr
Yes	APH Contractors Pty Ltd	Construction Training Fund	130000	1/05/2018 12:00:00 AM	11'
Yes	Create value when saving record : Southern Built Homes	Construction Training Fund	478467	4/07/2018 12:00:00 AM	11'
Yes	Ventura Home Group P L T/A Smart Homes For Living Pty Ltd T/A Ventura Homes	Construction Training Fund	500000	10/07/2018 12:00:00 AM	BA
Yes	Create value when saving record : John Craig & Darryl King	Construction Training Fund	500000	1/08/2018 12:00:00 AM	11'
Yes	Create value when saving record : Sarah Wilson	Construction Training Fund	29000	1/07/2018 12:00:00 AM	11'
Yes	Create value when saving record : Peter Brown & Kellee Brown	Construction Training Fund	40000	13/12/2017 12:00:00 AM	11'
Yes	Create value when saving record : Bunbury Classic Pools	Construction Training Fund	24800	18/06/2018 12:00:00 AM	11'

### Paying Bulk Project Batch

*PROCESS* Go to Levy Payments Tab > Find batch in list of payment > click eye icon against batch for payment

Construction Training Fund - Amadea Hristopoulos (amadea@ctf.wa.gov.au) [Log off](#)
My account |

Supporting the people building WA

User Management
Project Management
Project Bulk Process
Apprenticeships
Employment
Program Claims
Levy Payments

▶ Levy Payments

### PAYMENTS

Filter Options

Request

Contains

Pending

[Reset](#) [Search](#)

Actions	Request	Name	Total Amount	Status
	INV-02202-P8V4C9	25 - Levy Request Const300720181258	9207.11	New
	INV-02152-Y6G3K7	Receipt Pay Project - Levy Request 123456PR	900.00	New
	INV-02198-R8L7K8	Housing - Levy Request Ama-123456	400.00	New
	INV-02203-X3W5T7	Central Avenue - 11/06/2018 - Levy Request Const300720181333	665.38	New
	INV-02204-N1Y4K3	Norwood Pass - 18/06/2018 - Levy Request Const300720181435	187.60	New
	INV-02211-W3Q1G0	25 - Levy Request Const310720181334	8375.63	New
	INV-02145-Y0Z4M7	FFO TEST 1 - Levy Request TEST-CTF-101	500.00	Received At FFO
	INV-02146-P2T7M6	FFOTEST2 - Levy Request TEST-CTF-102	540.00	Received At FFO
	INV-02196-D4F2K1	Belgravia Street - 30/07/2018 - Levy Request Const300720181153	800.00	New

Items per page 25

[Hide Batch Projects ...](#)

Batch of projects appear in list > Select payment method type (see methods of payment for process)

## PROJECTS

**Request INV-02202-P8V4C9 25 - Levy Request Const300720181258**

**Projects Total 9207.11**

Actions	Batch/PO No	Project No	Project Name	Levy Charged	Levy Received	Levy Balance
✓	Const300720181258	1138852	1138852BH	0	0	404.33
✓	Const300720181258	1138853	1138853WA	0	0	117.78
✓	Const300720181258	1138854	1138854GB	0	0	720.00
✓	Const300720181258	1138855	1138855HA	0	0	1530.73
✓	Const300720181258	1200005	1200005BR	0	0	44.40
✓	Const300720181258	1203739	150592	0	0	1005.31
✓	Const300720181258	1203740	170086-88	0	0	2082.53
✓	Const300720181258	1149976	1714209	0	0	427.15
✓	Const300720181258	1171244	172025	0	0	289.80
✓	Const300720181258	1149978	1814112	0	0	489.21
✓	Const300720181258	1149965	1814277	0	0	547.61
✓	Const300720181258	1159915	2356	0	0	100.00
✓	Const300720181258	1210379	25	0	0	256.00
✓	Const300720181258	1212605	31507	0	0	381.95
✓	Const300720181258	1210452	319	0	0	304.00
✓	Const300720181258	1212557	32827	0	0	506.31

[Hide Payment Section ...](#)

Credit Card Payment






EFT Payment (Bank Transfer)

## METHODS OF PAYMENT

### Credit Card Payment

**PROCESS** > Click Credit Card Payment box > takes you to payment gateway > enter credit card details and click "pay now"

An Eway transaction receipt will be emailed to you on verification of payment details.

<p><b>Transaction</b></p> <p>Merchant Details</p> <hr/>  <p><b>Metisc</b></p> <p>eWAY - your online payment gateway</p> <hr/> <p>Customer Details</p> <p>First Name</p> <p>Last Name</p> <p>Email</p> <p>Address</p> <p>City</p> <p>State/ Province/ Region</p> <p>Postcode</p> <p>Country</p> <p>Phone #</p> <hr/> <p>Product Invoice Information</p> <p>Invoice Number</p> <p>Invoice Description</p> <p>Levy payments for CTF Project - Levy Request Const070720181011</p>	<p><b>Payment</b></p> <p>Purchase Amount <span style="float: right;"><b>\$200.00</b> (SAUD)</span></p> <hr/> <p>Credit Card Details</p> <p>  </p> <p>Card Number</p> <p>Name on Card</p> <p>Expiry Date</p> <p>Month <span style="border: 1px solid #ccc; padding: 2px;">▼</span> 2018 <span style="border: 1px solid #ccc; padding: 2px;">▼</span></p> <p>CCV </p> <hr/> <p style="text-align: right;"> <span style="color: orange; font-weight: bold;">Cancel</span> <span style="background-color: #f4a460; padding: 10px 20px; font-weight: bold; color: white;">PAY NOW</span> </p>
--	--

### EFT Payment

**PROCESS** > Click EFT Payment (Bank Transfer) button > transaction ID / reference box appears > click "Yes" button to generate levy payment request to make payment on

#### EFT Levy Payment

This action will create an EFT Levy Payment Request with the following details.  
Do you want to proceed?

Invoice

EFT Transaction Number\*

Amount\*

## FEATURES

### *Save as*

Save mapping will allow you to upload the same column headings and automatically map each time, saving time on mapping each import.

Go to Save As in Mapping Columns screen > name your mapping > click Save

**STEP 2: MAPPING COLUMNS**

File columns Portal columns

Activity Builders Registration Numt  
 BATCH REFERENCE Description of Works  
 Category Expected Date of Completi  
 Collection Fee House Number  
 Company ABN Lot Number  
 Completion Date Main BCA Class  
 Customer Address Postcode  
 Customer Email State  
 Customer Postcode  
 Customer State  
 Customer Suburb  
 Customer Telephone  
 Description of Works  
 First Name  
 Govt Authority Contract Iss  
 Govt Contract Number  
 Govt Issued Contract?  
 House No  
 Levy Payable  
 Levy Type  
 Property Lot  
 Property Postcode  
 Property State  
 Property Title  
 Registration Number  
 Salutation

Open Save Save as Delete

Actions	Status	File column name	Portal column name	Exp
	Passed	Commencement Date	Expected Date of Commencement	date
	Passed	Council	Issuing Authority	lette
	Passed	Levy Reference Number	Project No	lette
	Passed	Company Name	Project Owner	lette
	Passed	Property Address	Street 1	lette
	Passed	Property Suburb	Suburb	lette

Mapping Name\* Mapping1

Save Cancel

### *To use saved mapping*

Upload file > click next > go to Open > select from my mappings > click open

STEP 2 OF 4

**STEP 2: MAPPING COLUMNS**

File columns Portal columns

Activity Builders Registration Numt  
 BATCH REFERENCE Description of Works  
 Category Expected Date of Completi  
 Collection Fee House Number  
 Company ABN Lot Number  
 Completion Date Main BCA Class  
 Customer Address Postcode  
 Customer Email State  
 Customer Postcode  
 Customer State  
 Customer Suburb  
 Customer Telephone  
 Description of Works  
 First Name  
 Govt Authority Contract Iss  
 Govt Contract Number  
 Govt Issued Contract?  
 House No  
 Levy Payable  
 Levy Type  
 Property Lot  
 Property Postcode  
 Property State  
 Property Title  
 Registration Number  
 Salutation  
 Sector  
 Surname

Mapping1 Open Save Save as Delete

Actions	Status	File column name	Portal column name	Expected date
	Passed	Commencement Date	Expected Date of Commencement	date
	Passed	Council	Issuing Authority	letters and nu
	Passed	Levy Reference Number	Project No	letters and nu
	Passed	Company Name	Project Owner	letters and nu
	Passed	Property Address	Street 1	letters and nu
	Passed	Property Suburb	Suburb	letters and nu

My mappings Mapping1

Open Cancel

## TROUBLE SHOOT – INDIVIDUAL PROJECTS

### *I can not view payment in levy payments?*

- Are all mandatory fields completed?
  - Batch / PO No (pre-populated)
  - Street 1
  - Suburb
  - Project Title
  - Issuing Authority
  - Expected Date of Commencement
  - Value of Works
  - Levy Sector

To add any of the above mandatory fields return to Project management tab, click pencil on project you wish to update details on and save.

- In Levy Payments view, ensure the eye symbol has been clicked.
- Filter Option Settings are set to All

## TROUBLE SHOOT – BULK UPLOADS

### *File will not upload?*

Please ensure your upload complies with the following file requirements:

- Only file with these extensions will be accepted. .csv, .txt, .xls and .xlsx
- Please note that the Portal expects the first row to be the column headers. It will be used to perform header mapping in Step 2
- Your file has to contain only plain text value and not macros or formulas
- For Excel file, only spreadsheet named Sheet1 will be extracted
- The values in the file should not contain sub-totals or totals rows
- Upon clicking "Upload" button, your file will be read by the Portal. A grid will be shown with the data uploaded. Please validate the data in the grid.
- Datasheet **is** text?

### *I have more data than the Mandatory Fields, can I map more?*

Yes – you can map to all the portal columns available if you have the data in your worksheet

### *I don't have a project number?*

The project no. can be a permit number, a levy form number, or a unique reference to identify that project. It can contain letters and numbers.

## Expected Data for Mandatory fields

**STEP 2: MAPPING COLUMNS**

**File columns**

- Activity
- BATCH REFERENCE
- Category
- Collection Fee
- Company ABN
- Completion Date
- Customer Address
- Customer Email
- Customer Postcode
- Customer State
- Customer Suburb
- Customer Telephone
- Description of Works
- First Name
- Govt Authority Contract Iss
- Govt Contract Number
- Govt Issued Contract?
- House No
- Levy Payable
- Levy Type
- Property Lot
- Property Postcode
- Property State
- Property Title
- Registration Number
- Salutation
- Sector
- Surname

**Portal columns**

- Builders Registration Num
- Description of Works
- Expected Date of Completi
- House Number
- Lot Number
- Main BCA Class
- Postcode
- State

Open Save Save as Delete

Actions	Status	File column name	Portal column name	Expected data
	Failed	Commencement Date	Expected Date of Commencement	date
	Passed	Council	Issuing Authority	letters and nu
	Passed	Levy Reference Number	Project No	letters and nu
	Passed	Company Name	Project Owner	letters and nu
	Passed	Property Address	Street 1	letters and nu
	Passed	Property Suburb	Suburb	letters and nu
	Failed	Value of Works	Value of Works	only numbers

Items per page

Add mapping

Remove all mapping

Validate Mapping

Mandatory Field	Data Type	Example
Expected Date of Commencement	Date	30/07/2018
Issuing Authority	Letters and Numbers	City of Perth
Levy Sector	Letters Only	Housing Commercial Engineering Construction Resources Services
Project No	Letters and Numbers	123456ABC
Project Title	Letters and Numbers	Job 1234
Street 1	Letters and Numbers	Belgravia Street
Suburb	Letters and Numbers	Belmont
Value of Works	Numbers Only	450635