

Manage supply portal users (for Supply Group Administrators)

This quick reference guide takes you through the steps to provide others with access to the supplies you administer and to manage what they can and cannot do with respect to those supplies. This guide is for Hinekōrako users with the role of *Supply Group Administrator*. This means you have Administrator powers within Hinekōrako across all supplies in your *Supply Group*. This means you have Administrator powers within Hinekōrako across all supplies in your *Supply Group*. so use the *Manage supply portal users (for Supply Administrators)* Users Quick Reference Guide on the <u>Taumata Arowai website</u> instead.

You can invite people to come and create a user account for the Hinekōrako supply portal, regardless of whether those people have a *Supply Relationship* with a supply in your *Supply Group*. This includes creating the Contact record of a person not currently connected to your supply.

You can also choose to invite users to create user accounts that are restricted to a subset of supplies within your Supply Group. For more guidance on *Supply Groups* and using *Supply Relationships* and Hinekōrako user roles to restrict access to supplies, see the *Understand supply groups and user roles (for Supply Group Administrators)* quick reference guide on the <u>Taumata Arowai website</u>.

Step	What to do
1	Once you are logged in to the portal, click on the <i>Manage Users</i> link at the top of the page. If you cannot see that link it means you are not a <i>Supply Group Administrator</i> and don't have permission to manage users.

Taumata Arowai		f	My Supplies Whakamāori	Manage Users Whakamāori Q John Smith ↔
Home > My Supplies				
My Supplies				
In Progress Supply Registra	tions			
	Supply Name	Supply Type	Search	Q Register New Supply

Options

The Manage Users screen has three lists:

- *Pending Portal Users*, which is a list of people that have been emailed an invitation to set up their portal user account, but who have not yet done so.
- *Manage Existing Portal Users,* which is a list of people that currently have a portal account.
- *Invite New Portal Users,* which is a list of the people who are connected with the *Supply Group*, either because they have a relationship with one or more of the supplies in the Group or have been created as a Contact in this *Manage Users* section, but who have not yet been sent an invitation email.

From here you can do one of four things:

1. Create a new Contact record for a person you wish to invite by clicking on the *Add New Contact* button. Go to **Step 2**.

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Options

- 2. Send an invitation to a person who has not yet been sent one. Go to **Step 5**.
- 3. Resend an invitation to a person who has been sent an invitation but has lost it or it has expired. Go to **Step 7**.
- 4. Manage which supplies an existing user can see and what they can do with those supplies. You can also grant or remove Administrator rights, allowing them to manage users or not. Go to **Step 9**.

Manage User	S			
	-		Search	٩
Full Name 🛧	Email	Organisation	Supply Role	
Sigmund Freud	siggy@contoso.com		Supply Group User	*
Manage Existing Port	Email	Organisation	Search	٩
Isaac Newton	izzy@contoso.com		Supply Administrator	*
I Invite New Portal Use	rs		Search Q Add No	1 w Contact
Full Name 🛧	Email		Organisation	
There are no records to display.				



Create a new contact

Step	What to do
2	To add a new person to your <i>Supply Group</i> ahead of inviting them to set up a portal account, click on the <i>Add New Contact</i> button.

Ir	Invite New Portal Users					
			Search Q Add New Contact			
	Full Name 🛧	Email	Organisation			
	There are no records to display.					

Step	What to do
3	You'll be taken to a screen where you can enter the contact details of the person, including their name, email address, phone number and physical and/or postal addresses.
	Complete the details and click on <i>Submit</i> . Any errors, e.g. missing mandatory data or data in an invalid format, will be displayed allowing you to correct the errors and <i>Submit</i> again.

Create Contact	
Contact Information	
First Name *	
Last Name *	
Organisation Role	
Email *	
Business Phone *	
e.g. +64 4 123 4567 or +64271234567	
Mobile Phone	
e.g. +64271234567	
Physical Address	
Physical Address Search	
Search Address information	
Physical Address: Street 1*	
Physical Address: Street 2	

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Step	What to do
4	Once you have successfully submitted the person's details, you'll be taken back to the <i>Manage Users</i> page and the person will have been added to the <i>Invite New Portal Users</i> list.

Invite New Portal Users		
		Search Q Add New Contact
Full Name 🛧	Email	Organisation
Emanuel Kant	manny@contoso.com	•



Invite a new portal user

Step	What to do
5	Find the person you want to invite to become a portal user and then click <i>Invite User</i> from the drop down arrow at the end of their row in the <i>Invite New Portal Users</i> list.

III Name		Email Address	Organisation	
ac Newto	on	izzy@contoso.com		✓ Invite User
ер	What to) do		
5	You'll b choose	e taken to a screen where you can se which role the user will have once th	e the contact details of the person ar ey have set up their portal account.	nd the option to
	1.	If you want the user to have access give them one of the following roles	to all of the supplies in the Supply Gr s:	oup you administer
		 Supply Group Administrato update any data or submit manage other users, for ar 	r will give them the same rights you I any records to Taumata Arowai and a y supply within the Supply Group.	have: being able to also to invite and
		 Supply Group User will give Taumata Arowai, but not to 	them the rights to update data and a new solution of the second state of the second st	submit records to n the <i>Supply Group</i>
		 Supply Read Only will allow update it. 	<pre>v them to view data withing the Supp</pre>	<i>ly Group</i> but not
	2.	If you want the user to have access administer, give them one of the fo	to only certain supplies in the <i>Supply</i> llowing roles:	Group you
		 Supply Administrator will g records to Taumata Arowa specific supplies you will se 	ive them the rights to update any dat i and also to invite and manage other elect.	ta or submit any r users for the
		 Supply User will give them Arowai for the specific sup 	the rights to update data and submit plies you will select, but not to mana	records to Taumat ge users.
		 Supply Read Only will allow but not update it. 	them to view data for the specific such as the s	upplies you will sele
		Select which supplies you want then Access box for each. The supplies list If there are no such relationships, you supply quick reference guide on the	n to have access to in the portal by ti ted are those the person has a <i>Suppl</i> ou can set them up following the inst e <u>Taumata Arowai website</u> .	cking the <i>Provide</i> y <i>Relationship</i> with ructions in the Edi t
	3.	Click the <i>Invite and Assert Identity</i> of whose email the invitation is being means the person will not need to of which is a step that will be added to	heckbox. In doing so you are assertin sent to is the person you want to gran confirm their identity when they set u o Hinekōrako in the future.	g that the person nt access to. This Ip their user accour
	4.	Clicking Submit.		
	This wil start th RealMe explana	l send an invitation email to the person e process by which they will create th <i> account (for all users)</i> quick referent tion of that process.	on's email address, including a link th leir user account. See the Establish si nce guide on the <u>Taumata Arowai we</u>	at, when clicked, w upply portal and absite for an

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Step What to do

You will be returned to the *Manage Users* page where you will see the person in the *Pending Portal Users* list.

Invite User						
Contact Informatio	n					
First Name *		La	st Name *			
Isaac		Ne	wton			
Organisation		Em	ail *			
_		izz	<u>y@contoso.com</u>			
Business Phone		Ma	bile Phone			
+64 12345678		Pro	vide a telephone number			
Supply Role						
Select Supply Role *				1		
				*		
Supplies						
ID	Name	Туре	Relationships	Provide Access? 2		
KIW002	Kiwi drinking water supply	On-demand supply	Supply Operator			
Invite & Assert Identity						
Previous Submit	4					

Invite User	
Contact Information	
First Name *	Last Name *
Sigmund	Freud
Organisation	Email *
_	siggy@contoso.com
Business Phone	Mobile Phone
Provide a telephone number	+64 1234567
Supply Role	
Select Supply Role *	
Supply Group User	~
Invite & Assert Identity *	
Previous Submit	



Resend an invitation

Step	What to do
7	If a person you have invited to create a portal account has lost their email invitation or has been unable to set up their account because the invitation expired, you can resend the invitation by choosing <i>Resend Invite</i> from the drop down arrow at the end of their row in the <i>Pending Portal Users</i> list. Invitations expire after 14 days.

Manage Users				
Pending Portal Users	Email Address	Organisation	Supply Role	
Isaac Newton	izzy@contoso.com		Supply Administrator	
Manage Existing Portal Us	ers			Resend Invite

Step	What t	o do
8	You'll b	e taken to a page where you can:
	1.	Check and change the role you want to give them. See Step 6 above for information on the roles.
	2.	For roles of <i>Supply Admin, Supply User and Supply Read-only</i> , check and change the supplies they will have access to. They can only access supplies they have a <i>Supply Relationship</i> with.
	3.	Click <i>Submit</i> to send the new invitation email.

Manage Use	r				
Contact Information					
First Name *			Last Name *		
Isaac			Newton		
Organisation			Email *		
-			izzy@contoso.c	om	
Business Phone			Mobile Phone		
+64 12345678			Provide a teleph	one number	
Supply Role					
Supply Role *					1
Supply Administrator					
Supplies					
ID	Name	Туре		Relationships	Provide Access? 2
KIW002	Kiwi drinking water supply	On-demand supply		Supply Operator	
Send New Invitation					
Previous Submit					



Manage existing users

Step	What to do
9	To manage the access of an existing portal user, on the <i>Manage Users</i> page click on the drop down arrow at the end of that user's row in the <i>Manage Existing Portal Users</i> section and choose <i>Edit Access</i> .

Manage Users	S				
This screen is used to manage	users for your supplies.				
Pending Portal Users					
The list below includes contac	ts who have been invited to create th	neir Hinekõrako account but have not yet done so.			
You can select a contact to re-	send an invitation to create their Hir	nekōrako account.			
Full Name	Email Address	Organisation	Supply Role		
Manage Existing Porta	al Users				
The list below includes contac	ts who have already created their Hi	nekõrako account.			
You can select a contact to cha	ange the Hinekõrako user's role or ao	d or remove access to one or more supplies.			
Full Name	Email Address	Organisation	Supply Role		_
John Doe	jdoe@contoso.com		Supply Administrator	~	4
Invite New Portal User	rs			Edit Access	_

Step	What t	o do
10	You'll b	e taken to a page where you can:
	1.	View the contact details for the person. You cannot change their details here.
	2.	Change the Supply Role for the user (see Step 6 for an explanation of each role).
	3.	For roles of <i>Supply Administrator, Supply User and Supply Read-only</i> , check and change the supplies they will have access to. They can only access supplies they have a <i>Supply Relationship</i> with.
	Make t Has Sup	he required changes and click on <i>Submit</i> . To remove the user's access entirely, uncheck the <i>oply Access</i> box for all supplies.

Contact Infor	mation			
First Name *		La	st Name *	
ohn		D	e	
Organisation		Er	nail *	
-		jd	e@contoso.com	
Business Phone		м	bile Phone	
			wide a telephone number	
-6412345678		Pr	vide a relepitorie number	
-6412345678		Pr		
Gupply Role		Pr	vnue a relepinone numuer	
Supply Role		PT	a reepirore nomoe	
Supply Role * Supply Role *	tor	PT	vine a reepiivie numuei	
66412345678 Supply Role * Supply Administrat	tor	PT	vine a respinne numer	
6412345678 Supply Role * Supply Administrat upplies ID	tor Name	туре	Relationships	Has supply access
6412345678 Supply Role * Supply Administrat upplies ID ERE001	tor Name Erewhon	۲۲ Type On-demand supply	Relationships Agent, Supply Owner	Has supply access
6412345678 Supply Role * Supply Administrat Supplies ERE001 ERE001	tor Name Erewhon Erewhon	Pr Type On-demand supply On-demand supply	Relationships Agent, Supply Owner Registration contact	Has supply access
6412345678 Supply Role Supply Administrat Supples ERE001 ERE001	tor Name Erewhon Erewhon	Pr Type On-demand supply On-demand supply	Relationships Agent, Supply Owner Registration contact	Has supply access