

Register a New Supply

(for all users except Read Only)

This quick reference guide takes you through the steps to register a new supply on the Hinekōrako Supply Portal. Before you read this guide, you should read one of the following three guides on the <u>Taumata Arowai website</u> to familiarise yourself with the data you will be updating:

- The **Supply data** quick reference guide.
- The Supply data (Water Carrier Service) quick reference guide.
- The Supply data (Planned Event Temporary Supply) quick reference guide.

Whichever of the above documents is relevant to you is referred to throughout this guide as 'the relevant Data quick reference guide'.

You will step through the following screens, entering the required details for your supply, before submitting the supply record:

- The Supply Details screen
- The *Supply Components* screen, except for supplies of type Planned Event Temporary Supplies, which do not have components.
- The Supply Relationships screen
- The Final Details screen

When you submit the new supply on the Final Details screen, Hinekorako will check the supply to see:

- If any of the details entered potentially contain profanity. This is a check we need to complete before the supply details are displayed on the public register of supplies.
- Whether you have requested the suppression of any of the supply details from the public register. You can find out more about this option in the *Guidance for requests to supress information on the public register* on the <u>Taumata Arowai website</u>.

If any of the above apply, the supply will have a status of *Submitted* until the Taumata Arowai check is complete, when it will move to a status of *Registered*. While the status is *Submitted*, you won't be able to make any changes to the supply.

If none of the above applies, the submitted supply will, when Hinekōrako checking is complete, be updated to the *Registered* status and the supply will be available for display on the public register. See **Appendix C** in the *relevant Data quick reference guide* on the <u>Taumata Arowai website</u> for a list of details that will be shown on the register for the supply – except for Planned Event Temporary Supplies which are not shown on the register. Once the supply has a status of *Registered* you are able to edit the supply to make any changes required.

A supply that is either migrated from the Ministry of Health's Public Register of Suppliers and has not yet been verified or a new supply that has not yet been submitted has a status of *In Progress*. To find out how to continue the registration of those supplies see the *Confirm a migrated supply (for all users except Ready Only)* or the *Edit a Supply* quick reference guide on the Taumata Arowai website.

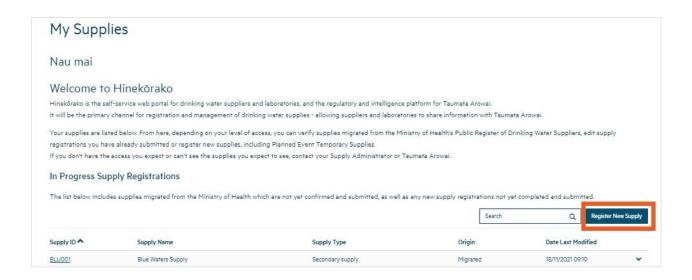


Starting the Process

Step What to do

Once you are logged in to the portal, choose *Register New Supply* on the *My Supplies* home page: the *Registered Supplies* list. If you cannot see the *Register New Supply* button, it may be that you have not been given the rights to register or update supplies.

You can check this with your Administrator.



Step What to do

2 You will be taken to the first of several screens in the process of registering a new supply.

Confirm and update, as required, your details as the *Registration Contact* on this screen. If the *Registration Contact* should be a different person, don't change the information on this screen. The correct *Registration Contact* can be added later in the process when *Supply Relationships* are created. For guidance about the data for this screen, *refer to the relevant Data quick reference guide* on the <u>Taumata Arowai website</u>, referred to in the introduction to this guide.

When you have finished, click on the *Next* button. If there are no problems with the data, you'll be taken to the *Supply Details* screen.



Register a Supply	
Hinekôrako currently holds supplies that have been migrated from the Ministry of Health's Public Register of Drinking Water Suppliers.	
Previously unregistered supplies do not have to be registered for some time yet. Please ensure you have spoken to Taumata Arowai about your reasons for registering a new supply.	
This is the first in a sequence of screens for registering your supply. Guidance on who is responsible for registration and the information required to help water suppliers to complete an application register a water supply can be found here. Before you start to register your water supply, please read the guidance document to identify where you may need to do some prior research or gather information in order to complete this process.	
Event organisers who intend to supply drinking water to persons attending a planned event such as a festival, sports event, market day, dog trial event, or other organised event will also need to this application. Guidance on how to complete this application can be found here.	complete
Create	
Contact Information	
Please note that these are your contact details. Please DO NOT update them with someone else's contact details. If you wish to make someone else the Registration Contact for this supply you can do that in the subsection Supply Relationships page. First Name *	quent
Carolyn	
Last Name *	
Ellis	
Email *	
carolyn.ellis@staumataarowai.govt.nz	
Business Phone	
e.g. +64.4 123.4567 or +64.271234567	
Mobile Phone	
+1	
Physical Address	
Physical Address Search	
342-344 Forest Hill Road, Walatarua, Auckland 0612	(Q
Physical Address: Street 1*	
342-344 Forest Hill Road	

Enter details about your supply on this screen. The data available to be entered will depend on the Supply Type you choose. For guidance about this, or about any particular piece of data, refer to the relevant Data quick reference guide on the <u>Taumata Arowai website</u>, referred to in the introduction to this guide.

When you have finished, click on the *Next* button. Clicking on the *Previous* button will return you to the *Registration Contact* screen.

QUICK REFERENCE GUIDE



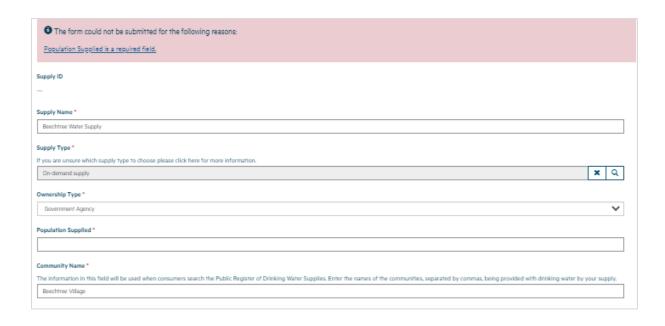
Supply ID	
офру и	
-	
upply Name *	
upply Type •	
you are unsure which supply type to choose please click here for more information.	Q
	4
Ownership Type *	
	·
Population Supplied *	
Community Name *	
rhe information in this field will be used when consumers search the Public Register of Drinking Water Supplies. Enter the names of the comm	nunities, separated by commas, being provided with drinking water by your supply.
Community Type *	
elect the primary type of community you are supplying drinking water to.	
	Q
region *	
elect the most relevant region for your supply.	
	Q
erritorial Authority *	
elect the most relevant territorial authority that is responsible for fresh water in your area.	
	Q
ublic Health Unit *	
elect the most relevant Public Health Unit (part of District Health Boards) that is responsible for public health services where you provide was	ater to.
	Q

Step What to do

If there are any problems with the data you've entered, you'll stay on this screen and the problems will be listed at the top of the screen. If the problem relates to a single piece of data you can click on the *link* in the error message and be taken to that data field to correct the problem.

The *relevant Data quick reference guide* on the <u>Taumata Arowai website</u> will explain the requirements for each piece of data.





Create Supply Components

Step What to do

If there are no problems with the data, when you click *Next* you'll be taken to the *Supply Components* screen, unless the *Supply Type* is *Planned Event Temporary Supply*, in which case you'll be taken to the *Supply Relationships* screen (go to **Step 7**).

On the Supply Components screen, depending on the type of supply, you can add:

- The Treatment Plants used within your supply
- The Sources used by your supply, i.e. the abstraction points at which you draw water for treatment
- The Distribution Zones by which you distribute the treated water to your consumers
- The relationships between Treatment Plants and Zones
- The relationships between the Treatment Plants and Sources

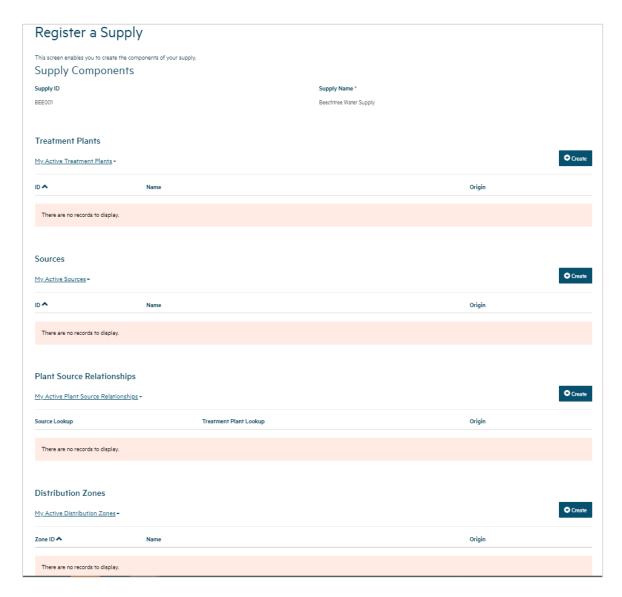
Which components are required for which *Supply Types* is explained in the *relevant Data quick reference guide* on the <u>Taumata Arowai website</u>.

If your supply has only one *Treatment Plant*, the *Plant/Zone* relationships are automatically created for all your zones and are not displayed on the screen.

You enter supply component details by:

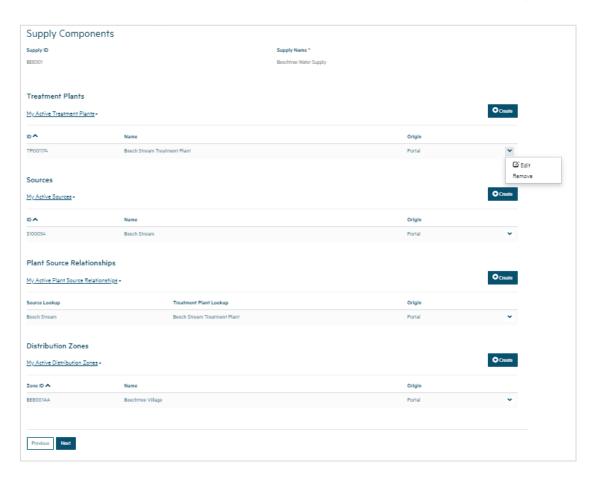
- 1. Clicking on the *Create* button above a component list to add a new component of that type.
- 2. When you've finished creating your supply components, clicking on the *Next* button will take you to the *Supply Relationships* screen.
- 3. If you click *Previous*, this will take you back to the *Supply Details* screen.





What to do If you have created a component and you need to update details for the component or you have created the component by error, you can update details by: Choosing the Edit or Remove option from the drop down menu at the end of a component's row in the list, to update the component's details or to remove the component. When you've finished, clicking on the Next button will take you to the Supply Relationships screen. If you click Previous, this will take you back to the Supply Details screen.





When you choose to create or edit a supply component, a screen will pop up where you can add or update the details for that component.

If the details include the geocode location for the component, i.e. the coordinates that pinpoint its exact location, then one option is for you to indicate the location on a map. In that case, you may be prompted to allow Hinekōrako to know your current location. If you want to use the Hinekōrako map feature to identify component coordinates you must choose *Allow* for the map to work.

If you choose *Block* and then change your mind you will need to go to your browser's Location settings and remove the taumataarowai.powerappsportals.com address from your blocked sites, then reload the screen. It's possible your workplace may block this option entirely and maps is not available to you.

See the **Appendix B** - How to use the map, of the *relevant Data quick reference guide* on the <u>Taumata Arowai website</u> for instructions on how to use the map.

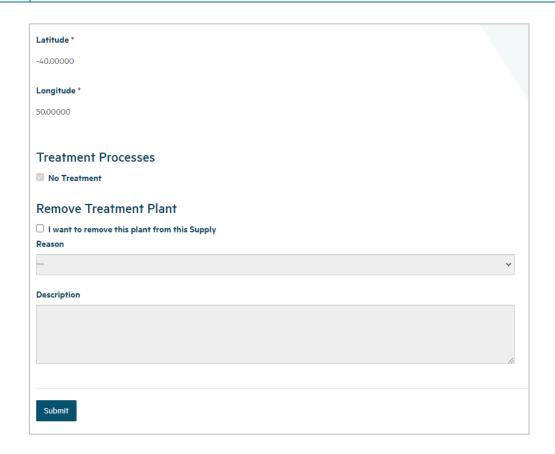




8 If you choose to remove a component, a screen will pop up where you can:

- Check the component details so you are sure you are removing the correct component.
- Provide a reason for the removal.
- Confirm you wish to remove the component.

If you remove the component it will be removed from the list of components of that type. You can see removed components by clicking on the *My Active Treatment Plants*, for example, and then choosing *My Inactive Treatment Plants*. The inactive components will be listed. You cannot reactivate them yourself. If you want them to be reactivated, contact Taumata Arowai.





Step	What to do
9	Once you have completed entering your supply components, click <i>Next</i> . As usual the data will be checked and, if there are any problems, error messages will be shown at the top of the screen.
	If there are no problems with the data, you'll be taken to the Supply Relationships screen.



Add Supply Relationships

Step What to do

10

On the Supply Relationships screen, you can add:

- The relationships that organisations have to your supply.
- The relationships that individual people (also known as *Contacts*) have to your supply.

In doing so you can create new records of organisations or contacts or you can look up organisations or contacts that are already set up for your other supplies. If you are going to create a new contact record and you know they are part of an organisation that you haven't created yet, you should create the organisation record first. When creating the relationship record you can indicate one or more relationship types, e.g. owner, operator, agent. The relationship types may vary depending on the *Supply Type*. See the *relevant Data quick reference guide* on the <u>Taumata Arowai website</u>, for details of the data able to be captured for the relationship as well as the records of organisations and contacts.

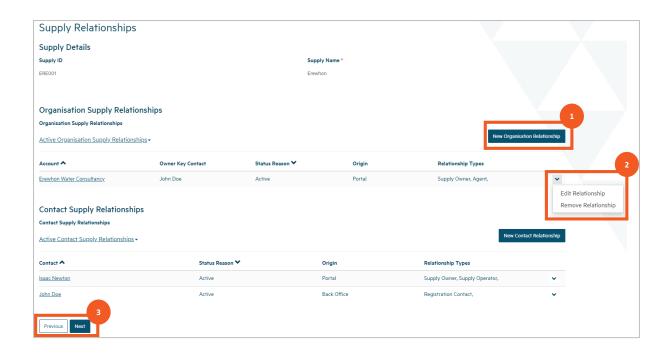
If you are a *Supply Group Administrator* and you want to enable a person to access Hinekōrako but to only be able to see a subset of the supplies you administer, you can give that person a Hinekōrako role which means they can only see the supplies they, as a *Contact*, have a *Supply Relationship* with. If you are a *Supply Administrator*, your access to supplies is restricted to those you have a *Supply Relationship* with, the users you manage are only those that have a *Supply Relationship* with a supply you have a *Supply Relationship* with and any role you give them will only allow them to access the supplies they have a *Supply Relationship* with. For more information, see the *Understand supply groups and user roles (for Supply Group Administrators and Supply Administrators)* quick reference guide on the Taumata Arowai website.

When you look up and select an existing organisation or contact, you can also update the details already held for the organisation or contact. For example, if an organisation's physical address or a contact's phone number has changed, you can choose to create the relationship and then choose to edit the details for the organisation or contact. Any changes to an organisation or contact only need to be made once. If you open a relationship with a different supply for the same organisation or contact you will see their details have been updated.

You can create new relationships and/or organisations and contacts by:

- 1. Clicking on the *New Organisation Relationship or New Contact Relationship* button above a relationship list to create a new relationship of that type.
- 2. When you've finished, click on the Next button to go to the Final Information screen.
- 3. If you click *Previous* this will take you back to the *My Supplies* screen.





What to do

Step

When you choose to create a new organisation relationship, you'll be taken to a screen where you can provide the details for that relationship.

If the organisation you are creating the relationship for already has a relationship with one of your other supplies, you'll be able to look up and select that organisation for the new relationship by typing in the organisation name and selecting it.

If it does not already exist, you'll be able to create a record of the new organisation by clicking on the *Create Organisation* button. Clicking the *Create Organisation* button will display a new screen for you to enter the details for the organisation. Once you submit that screen you will be returned to the *Create Organisation Supply Relationship* screen.

If you indicate that the organisation is an owner of your supply you must also create a record of a contact who will be the key contact for that organisation. If the contact already has a relationship with one of your other supplies, you'll be able to look up and select that contact for the key contact for this supply by typing in the contact name and selecting it.

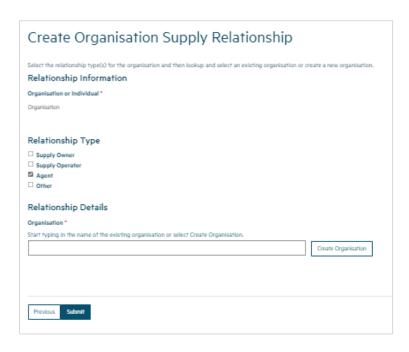
If it does not already exist, you'll be able to create a record of the new contact by clicking on the *Create Contact* button. Clicking the *Create Contact* button will display a new screen for you to enter the details for the contact. Once you submit that screen you will be returned to the *Create Organisation Supply Relationship* screen.

See the *relevant Data quick reference guide* on the <u>Taumata Arowai website</u> for the data able to be provided for the records of the relationship, organisation and contact.

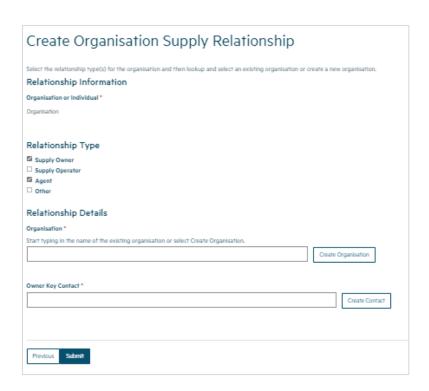
As you add an organisation and/or a contact to the relationship, all of their details are shown, which can make the screen very long. If you scroll down, the *Previous* and *Submit* buttons are at the very bottom.



Create Organisation Supply Relationship screen where Supply Owner has not been selected as a Relationship Type, showing Organisation field and Create Organisation button



Create Organisation Supply Relationship screen where Supply Owner has been selected as a Relationship Type, showing Organisation field and Create Organisation button as well as Owner Key Contact field and Create Contact button





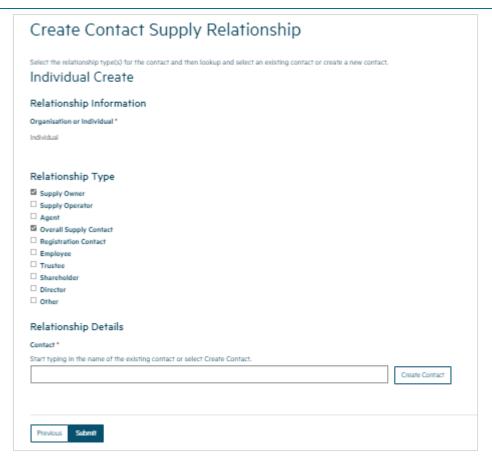
When you choose to create a new contact relationship, you'll be taken to a screen where you can provide the details for that relationship.

If the contact you are creating the new relationship for already has a relationship with one of your other supplies, you'll be able to look up and select that contact for this supply by typing in the contact name and selecting it.

If it does not already exist, you'll be able to create a record of the new contact by clicking on the *Create Contact* button. Clicking the *Create Contact* button will display a new screen for you to enter the details for the contact. Once you submit that screen you will be returned to the *Create Contact Supply Relationship* screen.

See the *relevant Data quick reference guide* on the <u>Taumata Arowai website</u> for the data able to be provided for the records of the relationship, organisation and contact.

As you add an organisation and/or a contact to the relationship, all of their details are shown, which can make the screen very long. If you scroll down, the *Previous* and *Submit* buttons are at the very bottom.



Step What to do

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Once you have created a relationship, you can choose to edit the relationship, whether to change the relationship details or the details of the organisation or contact the relationship is with. Choosing to edit a relationship will take you to a screen where you can update the details for that relationship and choose to edit the organisation or contact.

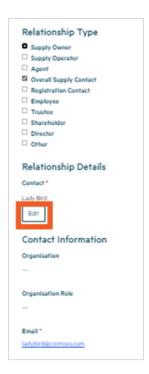


If you click on the *Edit* button above the organisation or contact details you'll be taken to a separate screen where you can update the details of the organisation or contact. Clicking *Submit* from there will bring you back to the *Edit Relationship* screen, with the details updated. Clicking *Previous* or *Submit* on the *Edit Relationship* screen will take you back to the *Supply Relationships* screen, with the details updated if you clicked *Submit*.

See the *relevant Data quick reference guide* on the <u>Taumata Arowai website</u> for the data able to be provided for the records of the relationship, organisation or contact.

As you edit a relationship all of the organisation and/or a contact details are shown on the *Edit Relationship* screen, which can make the screen very long. If you scroll down, the *Previous* and *Submit* buttons are at the very bottom.

Edit Relationship Screen showing details that can be updated and a button to edit the contact itself



What to do

Step 14

If you choose to remove a relationship you have created, a screen will pop up where you can:

- View and check the relationship details so you are sure you are removing the correct relationship.
- Select the *Remove Relationship* checkbox
- Provide a reason for the removal.
- Submit the screen to remove the relationship



What to do

Step

If, after selecting the *Remove Relationship* option and viewing the details, you decide to not remove the relationship, you can click on the *Previous* button to be returned to the *Supply Relationships* screen.

If you remove the relationship it will be removed from the list of supply relationships. You can see removed relationships by clicking on the *Active Organisation Supply Relationships*, for example, and then choosing *Inactive Organisation Supply Relationships*.

The inactive relationships will be listed. You cannot reactivate them yourself. If you want them to be reactivated, contact Taumata Arowai. This applies to both organisation and contact relationships.

Remove Relationship fields



Switching the view to see *Inactive Relationships*



Step What to do Once you have created the relationships for your supply, click Next. As usual the data will be checked and, if there are any problems, error messages will be shown at the top of the screen. If there are no problems with the data, you'll be taken to the Final Information screen.



Edit Final Information

Step What to do

16

On the Final Information screen, depending on the type of supply you are registering, you can:

- 1. Upload one or more documents related to the registration of your supply.
- 2. Indicate which, if any, Acceptable Solutions you have implemented.
- 3. Indicate if you are requesting suppression of supply details from appearing on the public register.
- 4. When you've finished or if you don't need make any changes here, click on the *Submit* button to submit the supply registration information with the details entered on all the screens.

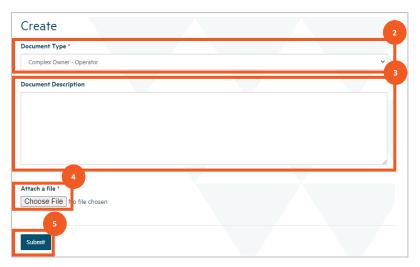
See the *relevant Data quick reference guide* on the <u>Taumata Arowai website</u> for the data able to be provided on this screen.

You have the option to upload any do	ocuments required to support your registration.			
When registering a Planned Event Te	emporary supply you should upload your Drinking Water Safety Plan.			
f different parts of your supply are o	wned or operated by different organisations or people, then you can up	pload documents about this to help us und	derstand your structure.	
f you have other information to supp	port your registration then you can upload the relevant documents.			
Documents				
			Upload Docu	ıment
Title	Document Type	Document Attached	Document Modified On ❤	
There are no records to display.				
,				
Final Information				
Acceptable Solution *	on for this supply, you will need to tick the box and then select the Drinking Wat	A constabile Colleges Constability I had about 11 had	distance	
No Yes	in for his supply, you will need to lick the box and men select the brinking wall	er Acceptable Solution from the list that will be	displayed.	
request Suppression of details from Put	olic register			
	etails of your supply are suppressed from the Public Register. If you select Yes, y th suppression will be granted and how to apply for suppression in the <i>Request</i>			ind ou
● No ○ Yes	2	.,	J J	
Submit				

What to do To upload a document: Click on the *Upload Document* button. This will open a pop screen where you can provide the details of the document. Choose the type of document. Choose *Registration Supporting Document* if no other type fits. Optionally provide a description of the document if you think it will help us understand its contents better. Click choose file and then browse your files to find and upload the one you want to add. There are certain file types we will not allow you to load for our security and you cannot load files larger than 30Mb. Click *Submit*.







Once you've uploaded the first document you can repeat the process to add other documents, if need be, building up a list of documents.

Once you've uploaded a document you can:

- 1. view its details by clicking the link in the *Title* column,
- 2. remove the document record by choosing *Remove Document* from the drop down at the end of the row or update the document details by choosing *Edit Document Details* from the drop down at the end of the row.

If you upload the incorrect document, you will need to first choose *Remove Document* and then click on the *Upload Document* button to load a new document to fix the problem.





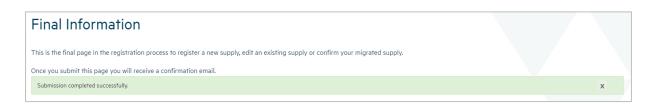


Once you have completed all the final information and uploaded any documents, click *Submit*. You'll be taken to a screen confirming your submission.

You can return to the *My Supplies* screen by clicking the *My Supplies* menu option at the top of the page.

The supply you have registered will either be shown in the list of *Registered Supplies* or, if Taumata Arowai need to check the details of the registration, in the list of *Other Supplies* with the status of *Submitted*. Sometimes your new supply will be listed in *Other Supplies* with a status of *Processing* while the system finishes processing the information. You may need to refresh your screen (by clicking *F5*) to be able to see the supply in the list of *Registered Supplies*.

Note: Every time a successfully registered supply is updated using the 'Edit Supply' selection you will need to reconfirm the changed supply information so that the information is updated correctly to the public register.









Managing an incomplete registration of a new supply

Step What to do 20 If, after completing entry of details on the Supply Details page, you leave any page in this process or you are timed out after 30 minutes of inactivity, the supply will be saved with an In Progress status and will appear in the first list on the My Supplies page. You can continue editing these supplies by choosing Continue Registration from the drop down list at the end of the supply row in the In Progress Supply Registrations list.

