

# Manage supply portal users (for Supply 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 Administrator*. This means you have *Administrator* powers within Hinekōrako, but only for the supplies that you have a *Supply Relationship* with. If you have the role of *Supply Group Administrator*, use the ***Manage supply portal users (for Supply Group Administrators)*** quick reference guide on the [Taumata Arowai website](#) instead.

This process assumes that one or more *Supply Relationships* with an individual person, as opposed to an organisation, have been set up for one or more of your supplies. You can now invite those people to come and create a user account for the Hinekōrako Supply Portal. If there are no such relationships, you can set them up following the instructions in the ***Edit a supply*** quick reference guide on the [Taumata Arowai website](#). For more guidance on the role of *Supply Relationships* in enabling and restricting access to supplies within a ***Understand supply groups and user roles (for Supply Group Administrators and Supply Administrators)*** quick reference guide on the [Taumata Arowai website](#).

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 Administrator</i> and don't have permission to manage users.



## 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 have a relationship with one or more of the supplies you administer, but who have not yet been sent an invitation email.

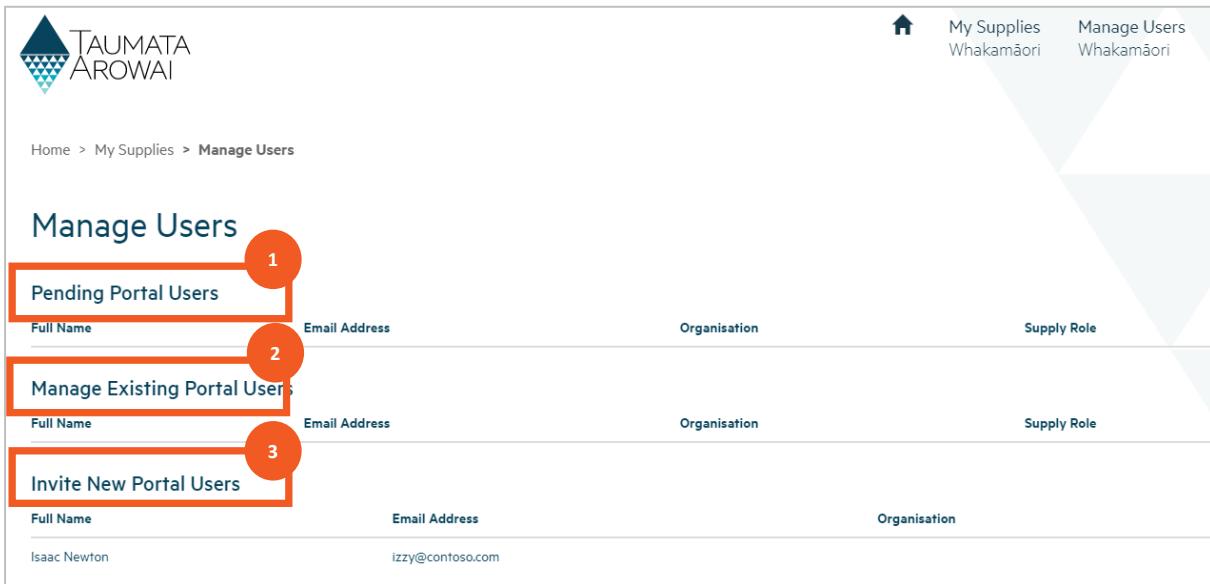
If you cannot see a person you expect to see in one of those three lists, it is likely to be because they do not have a relationship with one of the supplies you administer.

From here you can do one of three things:

1. *Send an invitation* to a person who has not yet been sent one. Go to **Step 2**.
2. *Resend an invitation* to a person who has been sent an invitation but has lost it or it has expired. Go to **Step 4**.

## Options

3. Manage which supplies an existing user can see and what they can do with those supplies. You can also grant or remove *Supply Administrator* rights, allowing them to manage users or not. Go to **Step 6**.



The screenshot shows the 'Manage Users' section of the portal. At the top, there are navigation links: Home > My Supplies > Manage Users. On the right, there are links for 'My Supplies Whakamāori' and 'Manage Users Whakamāori'. The main area is titled 'Manage Users' and contains three sections: 'Pending Portal Users', 'Manage Existing Portal Users', and 'Invite New Portal Users'. Each section has columns for 'Full Name', 'Email Address', 'Organisation', and 'Supply Role'. Step 1 (Pending Portal Users) is highlighted with a red box and a red circle containing the number 1. Step 2 (Manage Existing Portal Users) is highlighted with a red box and a red circle containing the number 2. Step 3 (Invite New Portal Users) is highlighted with a red box and a red circle containing the number 3.

Full Name	Email Address	Organisation	Supply Role
Full Name	Email Address	Organisation	Supply Role
Full Name	Email Address	Organisation	
Isaac Newton	izzy@contoso.com		

## Invite a new portal user

Step	What to do
2	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.



The screenshot shows a table titled "Invite New Portal Users". It has three columns: "Full Name", "Email Address", and "Organisation". There is one row visible with the data: "Isaac Newton" in the Full Name column, "izzy@contoso.com" in the Email Address column, and an empty field in the Organisation column. To the right of the table is a dropdown menu with a single option "Invite User" highlighted by a red box.

Step	What to do
3	<p>You'll be taken to a screen where you can see the contact details of the person and a list of the supplies with which they have a relationship in the registration records. You can grant them access by:</p> <ol style="list-style-type: none"> <li>1. Selecting the role you want the user to have: <ul style="list-style-type: none"> <li>• <i>Supply Administrator</i> will give them the same rights you have: being able to update any data or submit any records to Taumata Arowai for supplies they have a Supply Relationship with and also to invite and manage other users that have Supply Relationships with those supplies.</li> <li>• <i>Supply User</i> will give them the rights to update data and submit records to Taumata Arowai for supplies they have a Supply Relationship with, but not to manage users.</li> <li>• <i>Supply Read Only</i> will allow them to view data but not update it.</li> </ul> </li> <li>2. Selecting which supplies you want them to have access to in the portal by ticking the <i>Provide Access</i> box for the supply.</li> <li>3. Clicking the <i>Invite and Assert Identity</i> checkbox. In doing so you are asserting that the person whose email the invitation is being sent to is the person you want to grant access to. This means the person will not need to confirm their identity when they set up their user account, which is a step that will be added to Hinekōrako in the future.</li> <li>4. Clicking <i>Submit</i>.</li> </ol> <p>This will send an invitation email to the person's email address, including a link that, when clicked, will start the process by which they will create their user account. See the <b><i>Establish supply portal and RealMe® account (for all users)</i></b> on the <a href="#">Taumata Arowai website</a> quick reference guide for an explanation of that process.</p> <p>You will be returned to the <i>Manage Users</i> page where you will see the person in the <i>Pending Portal Users</i> list.</p>

# QUICK REFERENCE GUIDE



**Invite User**

Contact Information

First Name *	Last Name *
Isaac	Newton
Organisation	Email *
—	izzy@contoso.com
Business Phone	Mobile Phone
+64 1234-5678	Provide a telephone number

Supply Role

Select Supply Role \*

Supplies

ID	Name	Type	Relationships	Provide Access?
KIW002	Kiw drinking water supply	On-demand supply	Supply Operator	<input checked="" type="checkbox"/>

Invite & Assert Identity

Previous **Submit** 4

1 2 3 4

## Resend an invitation

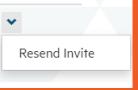
Step	What to do
4	If a person you have invited to create a portal account has lost their email invitation or has been unable to set up their account because the invitation expired, you can resend the invitation by choosing <i>Resend Invite</i> from the drop down arrow at the end of their row in the 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

### Manage Users

#### Pending Portal Users

Full Name	Email Address	Organisation	Supply Role
Isaac Newton	izzy@contoso.com		Supply Administrator

#### Manage Existing Portal Users



### Step What to do

5	You'll be taken to a page where you can:
	<ol style="list-style-type: none"> <li>1. Check and change the <i>role</i> you want to give them</li> <li>2. Check and change the <i>supplies</i> they will have access to.</li> <li>3. Click <i>Submit</i> to send the new invitation email.</li> </ol>

### Manage User

#### Contact Information

First Name *	Last Name *
Isaac	Newton

#### Organisation

—

#### Business Phone

+64 12345678

#### Mobile Phone

Provide a telephone number

#### Supply Role

##### Supply Role \*

Supply Administrator

1

#### Supplies

ID	Name	Type	Relationships	Provide Access?
KIWO02	Kiwi drinking water supply	On-demand supply	Supply Operator	<input checked="" type="checkbox"/>



##### Send New Invitation

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## Manage existing users

Step	What to do
6	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

This screen is used to manage users for your supplies.

#### Pending Portal Users

The list below includes contacts who have been invited to create their Hinekōrako account but have not yet done so. You can select a contact to re-send an invitation to create their Hinekōrako account.

Full Name	Email Address	Organisation	Supply Role
John Doe	jdoe@contoso.com		Supply Administrator

#### Manage Existing Portal Users

The list below includes contacts who have already created their Hinekōrako account.

You can select a contact to change the Hinekōrako user's role or add or remove access to one or more supplies.

Full Name	Email Address	Organisation	Supply Role	
John Doe	jdoe@contoso.com		Supply Administrator	<span style="border: 1px solid #ccc; padding: 2px;">▼</span> <div style="background-color: #f0f0f0; border: 1px solid #ccc; padding: 2px; margin-top: 2px;"> <a href="#">Edit Access</a> </div>

#### Invite New Portal Users

Step	What to do
7	<p>You'll be taken to a page where you can:</p> <ol style="list-style-type: none"> <li>View the contact details for the person. You cannot change their details. Only they can update their Profile.</li> <li>Change the <i>Supply Role</i> for the user (see Step 3 for an explanation of each role).</li> <li>Change which supplies the user has access to. They can only access supplies they have a <i>Supply Relationship</i> with.</li> </ol> <p>Make the required changes and click on <i>Submit</i>. To remove the user's access entirely, uncheck the <i>Has Supply Access</i> box for all supplies.</p>

**Contact Information**

<b>First Name *</b> <input type="text" value="John"/>	<b>Last Name *</b> <input type="text" value="Doe"/>
<b>Organisation</b> <input type="text" value="--"/>	
<b>Business Phone</b> <input type="text" value="+6412345678"/>	<b>Mobile Phone</b> <small>Provide a telephone number</small>

**Supply Role**

<b>Supply Role *</b> <input type="text" value="Supply Administrator"/>	<span style="color: #f00; font-size: 2em;">2</span>
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**Supplies**

ID	Name	Type	Relationships	Has supply access
ERE001	Erewhon	On-demand supply	Agent, Supply Owner	<input type="checkbox"/>
ERE001	Erewhon	On-demand supply	Registration contact	<input checked="" type="checkbox"/>

[Previous](#)
[Submit](#)