



Management of 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*.

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 and Supply Administrators)*** quick reference guide on the [Authority's 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 Group 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 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**.
2. Send an invitation to a person who has not yet been sent one. Go to **Step 5**.

**Options**

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 Users

Pending Portal Users 3

Search

Full Name ^	Email	Organisation	Supply Role
Sigmund Freud	siggyv@contoso.com		Supply Group User

Manage Existing Portal Users 4

Search

Full Name ^	Email	Organisation	Supply Role
Isaac Newton	izzv@contoso.com		Supply Administrator

Invite New Portal Users 2

Search

Add New Contact 1

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> and invite them to set up a portal account, click on the <i>Add New Contact</i> button.

Invite New Portal Users

Full Name ^	Email	Organisation
There are no records to display.		

Step	What to do
3	<p>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.</p> <p>Assign a Supply Role for the user, being one of:</p> <ul style="list-style-type: none"> <i>Supply Group Administrator</i> will give them the same rights you have: being able to update any data or submit any records to The Authority and also to invite and manage other users, for any supply within the Supply Group. <i>Supply Group User</i> will give them the rights to update data and submit records to The Authority, but not to manage users, for any supply within the <i>Supply Group</i>. <i>Supply Read Only</i> will allow them to view data withing the <i>Supply Group</i> but not update it. <p>Complete the details and click on <i>Next</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>click on Next</i> again.</p>



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



Step	What to do
4	<p>You'll be taken to a screen where you can confirm the access requirements for your new contact.</p> <p>Confirm (and correct if necessary) their Name, their Supply Role and then add or remove Supply Groups that the new contact will have access to.</p> <p>Click 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.</p> <p>Click <i>Submit</i> and an invitation email will be sent 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 <i>Establish supply portal and RealMe® account (for all users)</i> quick reference guide on the The Authority website 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>

Home > Manage Users > Confirm Contact Access

Confirm Contact Access

Please check the contact details and supply group access below before submitting. You can remove access to a supply group by choosing Remove access in the grid.

Contact Information

First Name *

Last Name *

Supply Role *

☐ Invite & Assert Identity *

Supply Groups

Account Name ^		
		<input type="button" value="Add Supply Group"/>
		▼
		▼
		▼



Invite a new portal user

Step	What to do
5	<p>Contacts who have one or more supply group relationships for the current supply group or supply relationships with one or more supplies in the current supply group, but do not have a Hinekōrako user account can be invited to create a user account. These contacts are shown in the <i>Invite New Portal Users</i> list.</p> <p>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 list they appear in.</p>

Invite New Portal Users		
Full Name	Email Address	Organisation
Isaac Newton	izzy@contoso.com	<div> <div>Invite User</div> </div>

Step	What to do
6	<p>You'll be taken to a screen where you can see the contact details of the person and the option to choose which role the user will have once they have set up their portal account.</p> <ol style="list-style-type: none"> If you want the user to have access to all of the supplies in the <i>Supply Group</i> you administer, give them one of the following roles: <ul style="list-style-type: none"> <i>Supply Group Administrator</i> will give them the same rights you have: being able to update any data or submit any records to The Authority and also to invite and manage other users, for any supply within the Supply Group. <i>Supply Group User</i> will give them the rights to update data and submit records to The Authority, but not to manage users, for any supply within the <i>Supply Group</i>. <i>Supply Read Only</i> will allow them to view data withing the <i>Supply Group</i> but not update it. <p>Select which supply groups you want them to have access to by adding or removing supply groups you are administering.</p> If you want the user to have access to only certain supplies in the <i>Supply Group</i> you administer, give them one of the following roles: <ul style="list-style-type: none"> <i>Supply Administrator</i> will give them the rights to update any data or submit any records to The Authority and also to invite and manage other users for the specific supplies you will select. <i>Supply User</i> will give them the rights to update data and submit records to The Authority for the specific supplies you will select, but not to manage users. <i>Supply Read Only</i> will allow them to view data for the specific supplies you will select but not update it.



Step	What to do
	<p>Select which supplies you want them to have access to in the portal by adding or removing supply access using the drop down arrow at the end of the row for each supply. The supplies listed are those the person has a <i>Supply Relationship</i> with. If there are no such relationships, you can set them up following the instructions in the Edit a supply quick reference guide on the The Authority website.</p> <ol style="list-style-type: none"> 3. Click 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. 4. Clicking <i>Submit</i>. <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 Establish supply portal and RealMe® account (for all users) quick reference guide on the The Authority website 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>



(Supply Roles)

Home > Manage Users > Invite User

Invite User

Contact Information

First Name *

Last Name *

Organisation

Email

Business Phone

Mobile Phone

e.g. +64271234567

Supply Role

Select Supply Role *

Supply User

☐ Invite & Assert Identity *

Supply Relationships

Supply ID	Supply ^	Relationship Types	Has Supply Access
V	<input type="text"/>	Supply Owner, Supply Operator	No

Submit

(Supply Group Roles)

Home > Manage Users > Invite User

Invite User

Contact Information

First Name *

Last Name *

Organisation

Email

Business Phone

Mobile Phone

e.g. +64271234567

Supply Role

Select Supply Role *

Supply Group User

☐ Invite & Assert Identity *

Supply Groups

Add Supply Group

Account Name ^

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

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

Manage Existing Portal Users

Resend Invite

Step	What to do
8	<p>You'll be taken to a page where you can:</p> <ol style="list-style-type: none"> 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 Administrator</i>, <i>Supply User</i> and <i>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. For roles of <i>Supply Group Administrator</i>, <i>Supply Group User</i> and <i>Supply Group Read Only</i>, check and change the supply group(s) they will have access to. Only Supply Groups administered by the requesting Supply Group Administrator can be added to the invited user. 4. Click <i>Submit</i> to send the new invitation email.



Home > Manage Users > Manage User

Manage User

Contact Information

First Name *

Last Name *

Organisation

—

Email

[j@contoso.com](#)

Business Phone

+64

Mobile Phone

e.g. +64271234567

Supply Role

Supply Role *

Supply Group Administrator

☐ Send New Invitation *

Supply Groups

		Add Supply Group
Account Name ^		
\$		▼
		▼
\$		▼

[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

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

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

Invite New Portal Users

 Edit Access

Step	What to do
10	<p>You'll be taken to a page where you can:</p> <ol style="list-style-type: none"> 1. View the contact details for the person. You cannot change their details here. 2. Change the <i>Supply Role</i> OR <i>Supply Group Role</i> for the user (see Step 6 for an explanation of each role). 3. For roles of <i>Supply Administrator</i>, <i>Supply User</i> and <i>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. 4. For roles of <i>Supply Group Administrator</i>, <i>Supply Group User</i> and <i>Supply Group Read Only</i>, check and change the supply group(s) they will have access to. Only Supply Groups administered by the Supply Group Administrator can be added or removed. <p>Make the required changes and click on <i>Submit</i>. To remove the user's access entirely remove each Supply or Supply Group.</p>

[Home](#) > [Manage Users](#) > [Manage User](#)

Manage User

Contact Information

First Name *

Last Name *

Organisation

Email

Business Phone

+642

Mobile Phone

e.g. +64271234567

Supply Role

Supply Role *



Supply Groups

[Add Supply Group](#)

Account Name ▲

