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 [Taumata Arowai website](#) 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 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 *Manage Users* link at the top of the page. If you cannot see that link it means you are not a *Supply Group Administrator* 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**.

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 Users

Pending Portal Users

Full Name ⌃	Email	Organisation	Supply Role
Sigmund Freud	siggy@contoso.com		Supply Group User

Manage Existing Portal Users

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

Invite New Portal Users

Add New 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 *Supply Group* ahead of inviting them to set up a portal account, click on the *Add New Contact* button.

Invite New Portal Users

Full Name ⌃	Email	Organisation

There are no records to display.

Search 🔍 | Add New Contact

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 *Submit*. Any errors, e.g. missing mandatory data or data in an invalid format, will be displayed allowing you to correct the errors and *Submit* 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
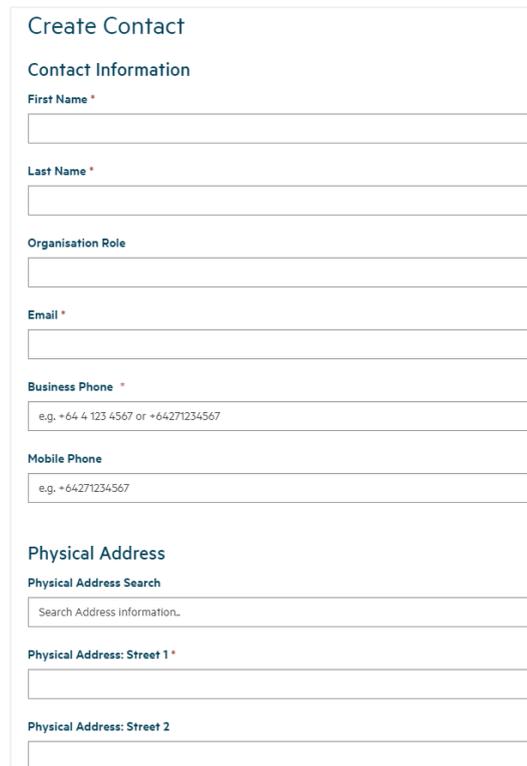
Step	What to do
4	Once you have successfully submitted the person's details, you'll be taken back to the *Manage Users* page and the person will have been added to the *Invite New Portal Users* list.

Invite New Portal Users

| | | | Search 🔍 | 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 *Invite User* from the drop down arrow at the end of their row in the *Invite New Portal Users* list.

Invite New Portal Users

Full Name	Email Address	Organisation	
Isaac Newton	izzy@contoso.com		⌄
			Invite User

Step	What to do
6	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.

   1. If you want the user to have access to all of the supplies in the *Supply Group* you administer, give them one of the following roles:

- *Supply Group Administrator* will give them the same rights you have: being able to update any data or submit any records to Taumata Arowai and also to invite and manage other users, for any supply within the Supply Group.
- *Supply Group User* will give them the rights to update data and submit records to Taumata Arowai, but not to manage users, for any supply within the *Supply Group*.
- *Supply Read Only* will allow them to view data withing the *Supply Group* but not update it.

   2. If you want the user to have access to only certain supplies in the *Supply Group* you administer, give them one of the following roles:

- *Supply Administrator* will give them the rights to update any data or submit any records to Taumata Arowai and also to invite and manage other users for the specific supplies you will select.
- *Supply User* will give them the rights to update data and submit records to Taumata Arowai for the specific supplies you will select, but not to manage users.
- *Supply Read Only* will allow them to view data for the specific supplies you will select but not update it.

Select which supplies you want them to have access to in the portal by ticking the *Provide Access* box for each. The supplies listed are those the person has a *Supply Relationship* 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 [Taumata Arowai website](#).

   3. Click the *Invite and Assert Identity* 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 *Submit*.

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 [Taumata Arowai website](#) for an explanation of that process.

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.

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 *Resend Invite* from the drop down arrow at the end of their row in the *Pending Portal Users* list. Invitations expire after 14 days.

Step	What to do
8	You'll be 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 *Supply Admin, Supply User and Supply Read-only*, check and change the supplies they will have access to. They can only access supplies they have a *Supply Relationship* with. 3. Click *Submit* to send the new invitation email.

Manage existing users

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

Step	What to do
10	You'll be 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 *Supply Administrator, Supply User and Supply Read-only*, check and change the supplies they will have access to. They can only access supplies they have a *Supply Relationship* with. Make the required changes and click on *Submit.* To remove the user's access entirely, uncheck the *Has Supply Access* box for all supplies.