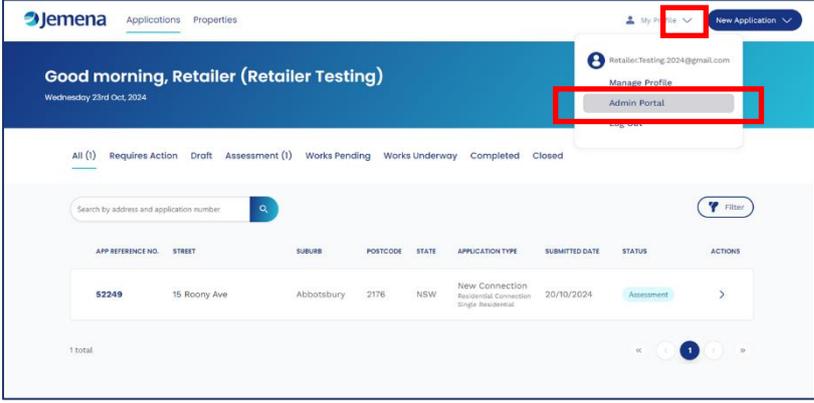
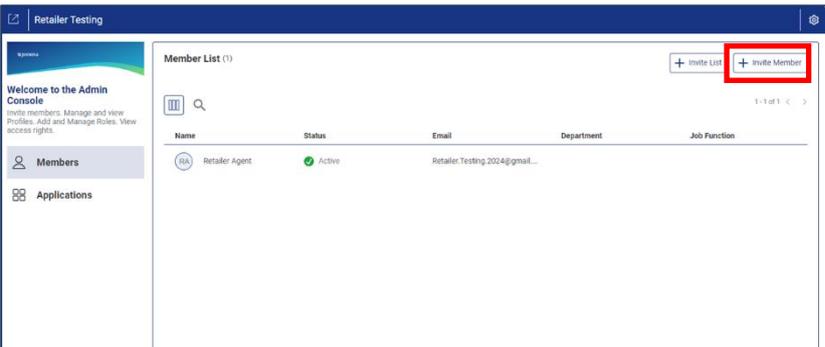


My Portal Cheat Sheet

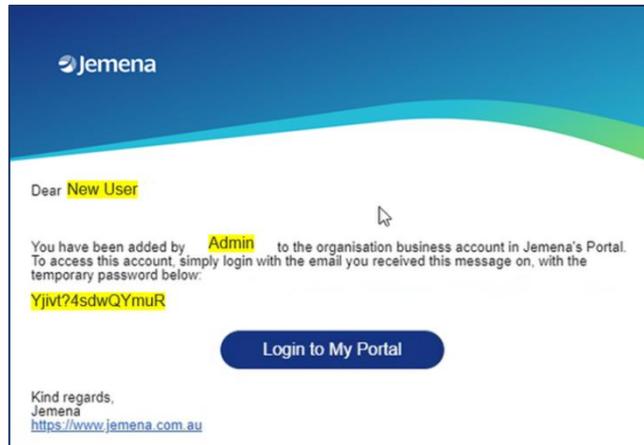
Managing User Access for your Organisation

Step	Screenshot
<p>PLEASE NOTE: Jemena will create Delegated Admin status for a person in your organisation. This person will then be able to manage the access for all of your internal users, including adding and deleting users and assigning more Delegated Users.</p> <p>1. Users can be added individually or in bulk.</p> <p>From your dashboard, click on the arrow next to My Profile (top right of screen) and select Admin Portal¹.</p> <p>¹ This option is only available to those with Delegated Admin status in the portal.</p>	 <p>The screenshot shows the Jemena portal dashboard for a user named 'Retailer (Retailer Testing)'. In the top right corner, there is a user profile menu with an arrow icon next to the user name. A red box highlights this arrow. Below the arrow, a dropdown menu is visible, with 'Admin Portal' highlighted by another red box. The main dashboard area shows a table of applications with columns for APP REFERENCE NO., STREET, SUBURB, POSTCODE, STATE, APPLICATION TYPE, SUBMITTED DATE, STATUS, and ACTIONS. A search bar and filter options are also visible.</p>
<p>2. Click on +Invite Member on the top right.</p>	 <p>The screenshot shows the 'Admin Console' for 'Retailer Testing'. On the right side of the console, there is a '+ Invite Member' button highlighted with a red box. Below this button is a 'Member List' table with columns for Name, Status, Email, Department, and Job Function. The table contains one entry: 'Retailer Agent' with a status of 'Active' and an email address 'Retailer.Testing.2024@gmail...'. The left sidebar shows navigation options for 'Members' and 'Applications'.</p>

3. Enter the **new user details** including first name, last name, email, phone, department and job function.

Select **Australia** from the drop down menu in the phone field.

4. This will trigger an email to the user that will prompt them to login with their email and a temporary password.

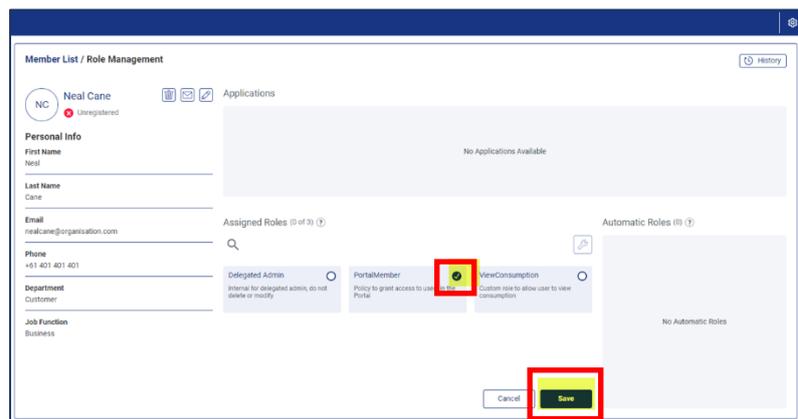


5. Back on the **Members** screen, the **Delegated Admin** can edit a user's details, and also assign them a role by clicking on the **spanner** icon.

Name	Status	Email	Department	Job Function
(RA) Retailer Agent	Active	Retailer.Testing.2024@gmail...		

6. Choose a role from **Delegated Admin, Portal Member** or **View Consumption**.

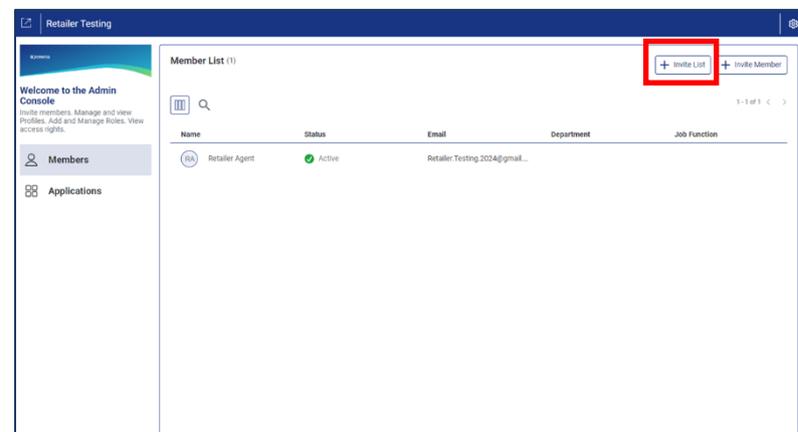
Most of your users should be set up as **Portal Members**. The View Consumption role won't be applicable for anyone managing gas applications.



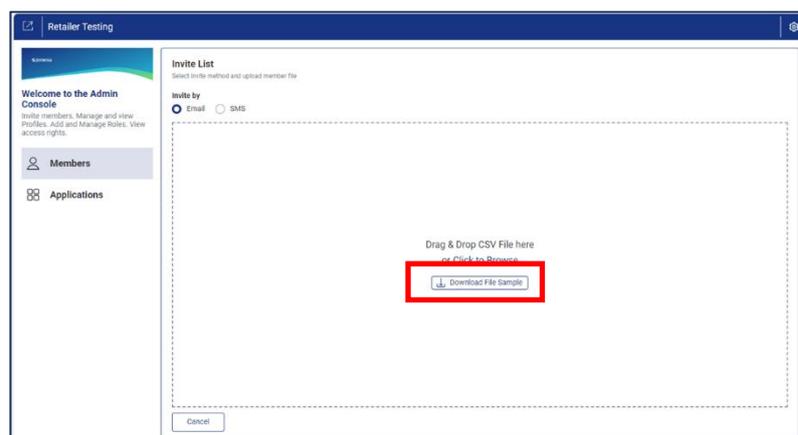
7. These steps can be repeated to add more users.

If you have to add a lot of users, they can be created in bulk by uploading them in a **CSV file**.

To do this, instead of clicking on +Invite Member, select **+Invite List**.



8. Then select **Download File Sample** to download the template.

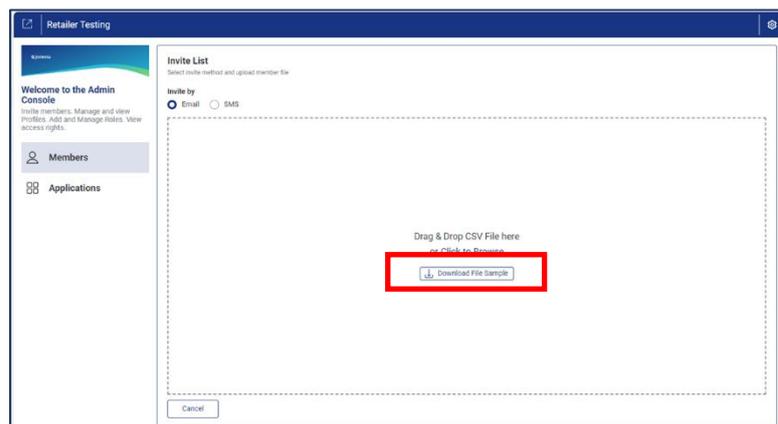


9. Next, populate the template with the users' information.

- Limit the list to 20 members
- Complete all the mandatory fields
- **Leave the Role column blank.** Users will automatically be assigned the **Portal Member** role – you can change this later if necessary.
- Language **en** for English.
- Add the phone numbers with the prefix +61, you will need to add an apostrophe (') before the +61.
- Phone number is a required field, but it can be a mobile or a landline.

	A	B	C	D	E	F	G	H
1	firstName	lastName	email	phone	roles	department	jobfunction	language
2	Jane	Smith	janesmith@organisation.com	+6188882222		Customer	Business	en
3	Alan	Devill	alandevill@organisation.com	+6188883333		Customer	Business	en
4	Bob	Rose	bobrose@organisation.com	+6188884444		Customer	Business	en
5	Neal	Cane	nealcane@organisation.com	+6188885555		Customer	Business	en
6	Katy	Fun	katyfun@organisation.com	+6188886666		Customer	Business	en

10. Save the file and close it. You can then either drag it in, or browse for the file and then follow the prompts



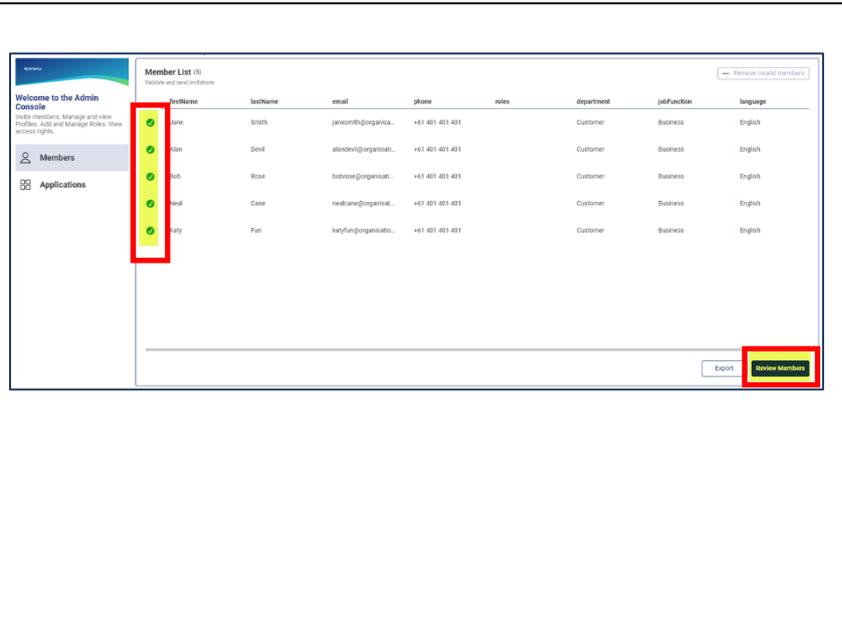
11. The member list will appear on screen.

Click on **Send by Email**.



12. A **green tick** will then appear next to their name to confirm that users have been added.

Click on **Review Members** and then click **Done**.



13. Members will initially have a status of **Unregistered**.

This will update to **Active** once they action their registration email and login to the portal.

