My Portal Cheat Sheet

Managing User Access for your Organisation

<table>
<tr><th>Step</th><th>Screenshot</th></tr>
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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.

1. Users can be added individually or in bulk.

   From your dashboard, click on the arrow next to **My Profile** (top right of screen) and select **Admin Portal**[1].

[1] **This option is only available to those with Delegated Admin status in the portal.**

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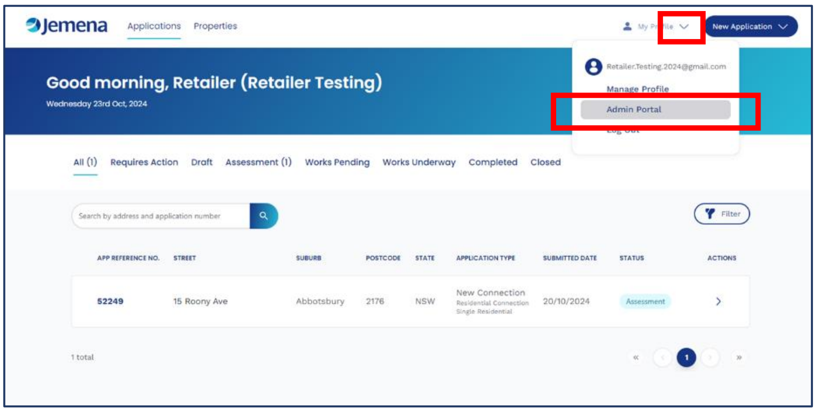

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2. Click on **+Invite Member** on the top right.

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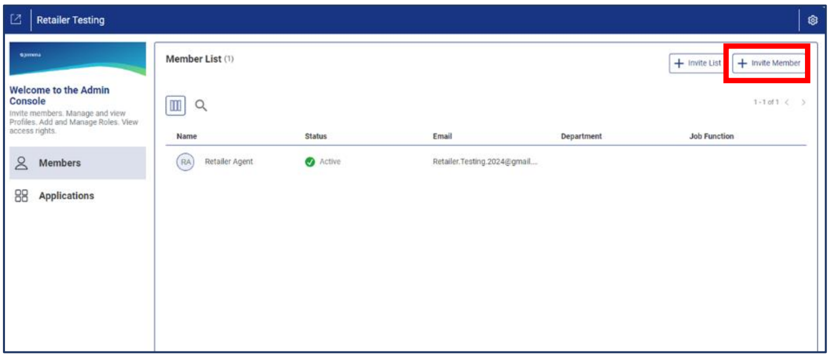

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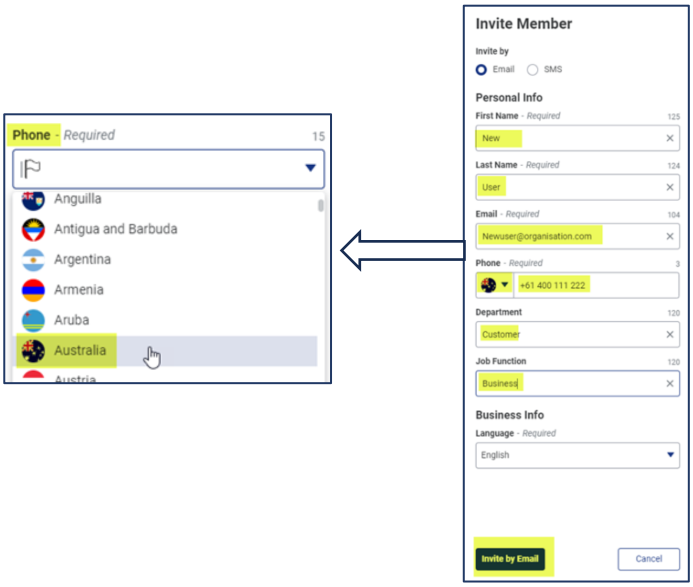
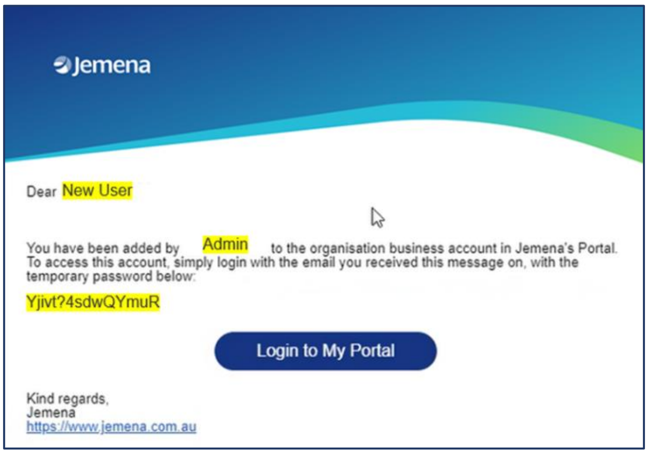
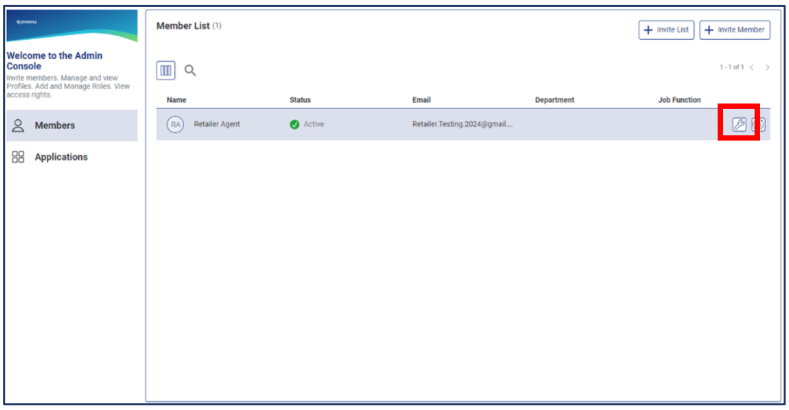
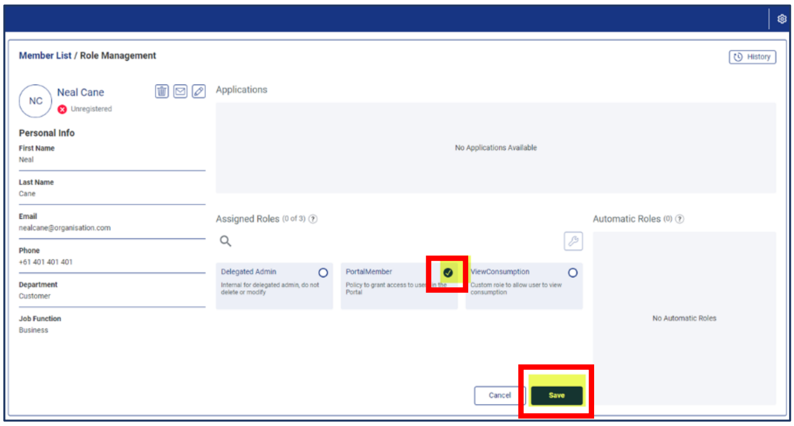
3. Enter the **new user details** including first name, last name, email, phone, department and job function. Select **Australia** from the drop down menu in the phone field.	
4. This will trigger an email to the user that will prompt them to login with their email and a temporary password.	
5. Back 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.	

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

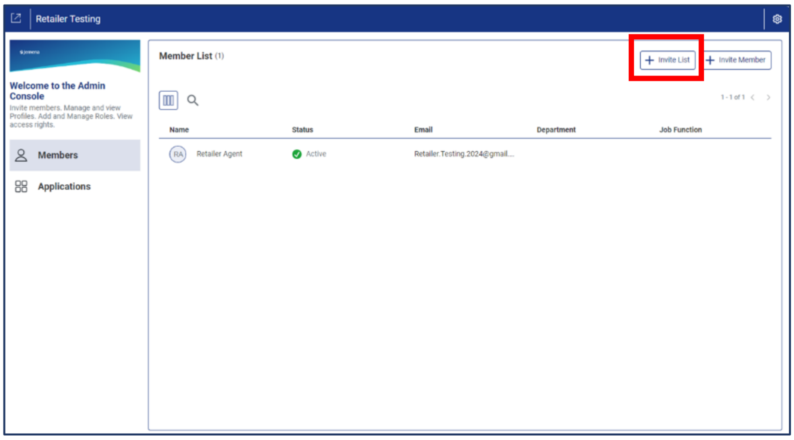
   Most of your users should be set up as **Portal Members**. The View Consumption role won't be applicable for anyone managing gas applications.



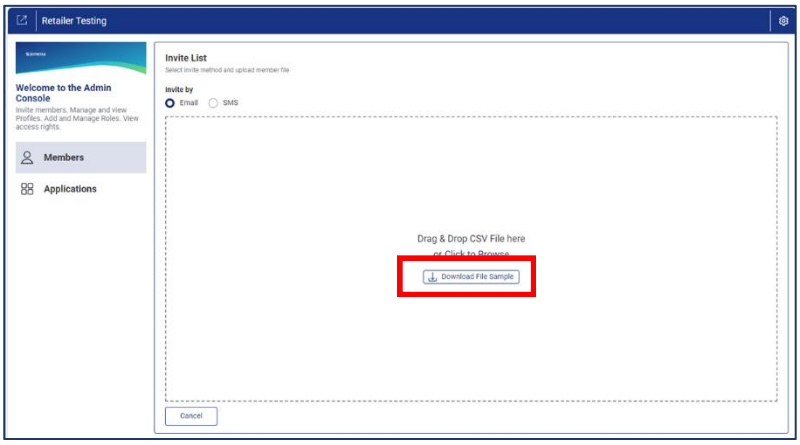
7. These steps can be repeated to add more users.

   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**.

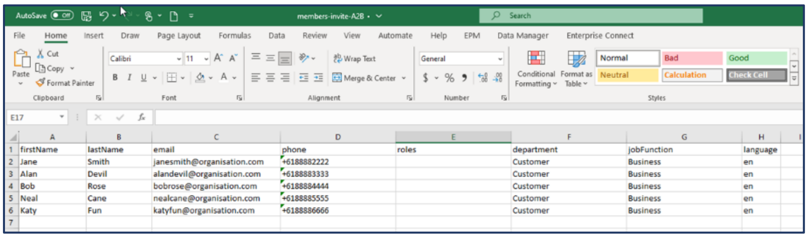


8. Then select **Download File Sample** to download the template.

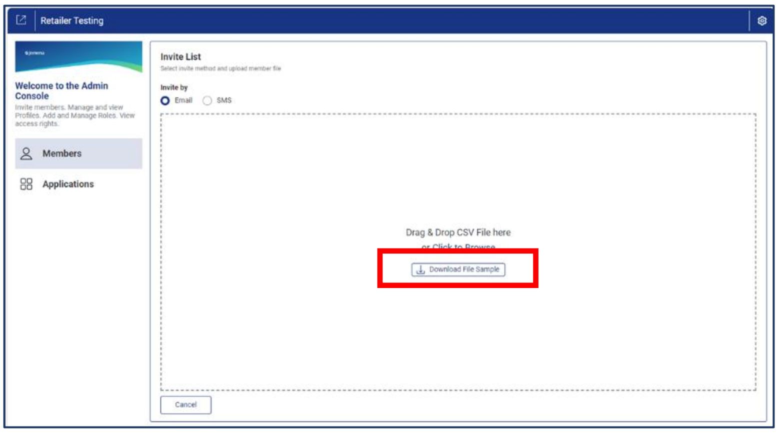


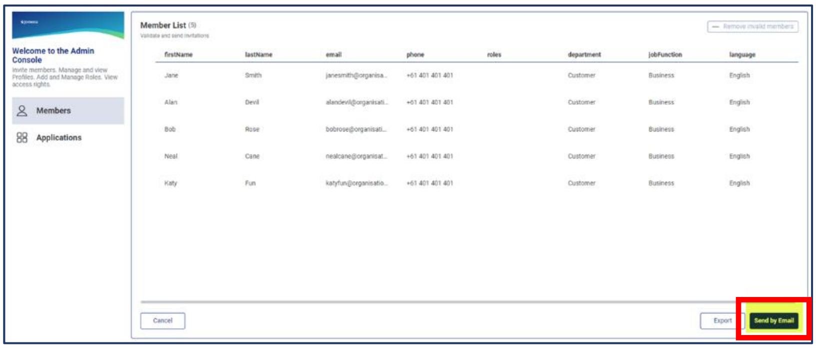
9. Next, populate the template with the users' information.

- 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.



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.