Identity and access management (IAM) organisation administrator guidelines

June 2013

NZ **TRANSPORT** AGENCY
WAKA KOTAHI

CONTENTS

DOCUMENT INFORMATION

The purpose of this document is to provide guidelines on how to register with the NZ Transport Agency (NZTA) Identity and Access Management (IAM) application to be an Organisation Administrator (Org Admin) for an organisation.

Once you become an approved Org Admin, this document details how to:

- log on to access an IAM-protected application
- maintain an IAM Org Admin account
- register an employee of your organisation to be a general user and enable him/her to access an NZTA IAM application
- maintain a general user account
- request additional application access.

REALME SERVICE

The RealMe® service from the New Zealand government and New Zealand Post lets people prove who they are and more easily access services online in the future. It will give you a secure online way to prove your identity to an organisation, such as a bank, insurance company or government agency.

The RealMe service allows you to use the same login details to access all participating government service provider's online services. This saves you from having to remember multiple login details for different services.

For more information go to **www.RealMe.govt.nz**.

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REGISTERING TO BE AN ORGANISATION ADMINISTRATOR

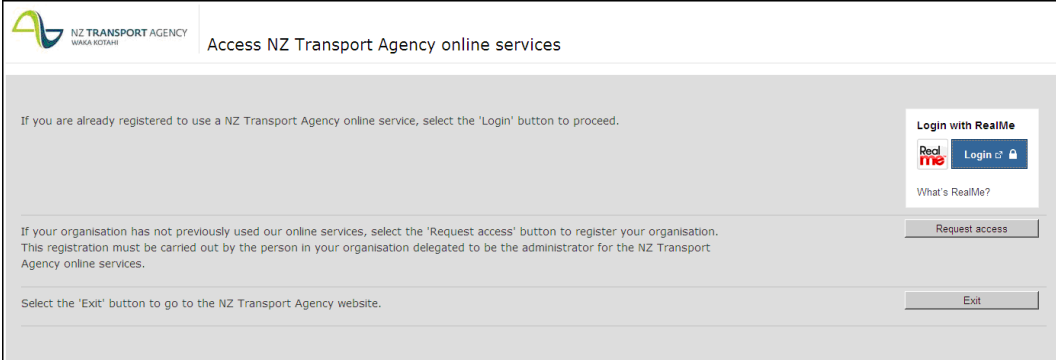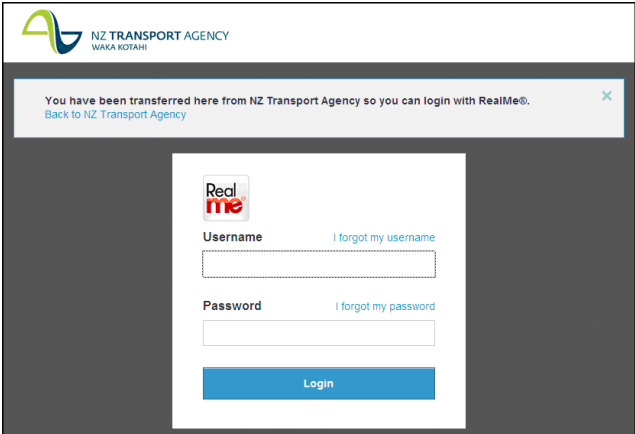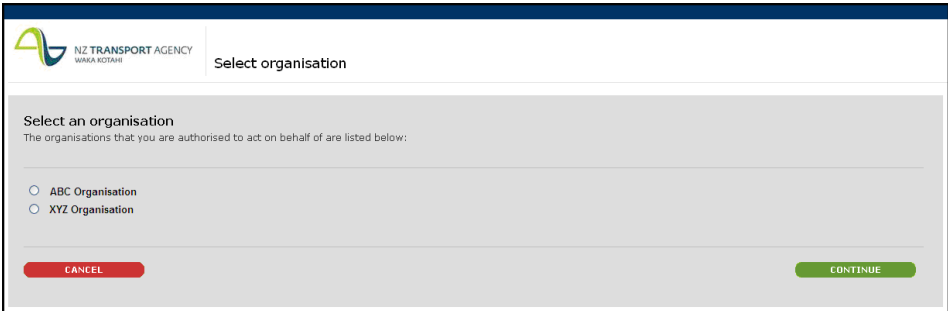| Step	Action
1	Go to the Access NZ Transport Agency online services screen. You can do this by going to the NZTA website at **www.nzta.govt.nz/online** and clicking on **Other web services**.
2	Click on the **Request access** button to display the Application access screen.
3	Select the application you wish to access from the dropdown list and click the **Login** button to display the RealMe login screen. Click **Cancel** if you wish to end the registration process. You will be returned to the Access NZ Transport Agency online services screen.
4	Enter your RealMe username and password and click the **Login** button to display the Organisation administrator registration screen. If you do not have a RealMe login, create one by clicking on the **Create your RealMe login now** button. Click **Cancel** if you wish to end the login process. You will be returned to the Access NZ Transport Agency online services screen.

REGISTERING TO BE AN ORGANISATION ADMINISTRATOR, CONTINUED

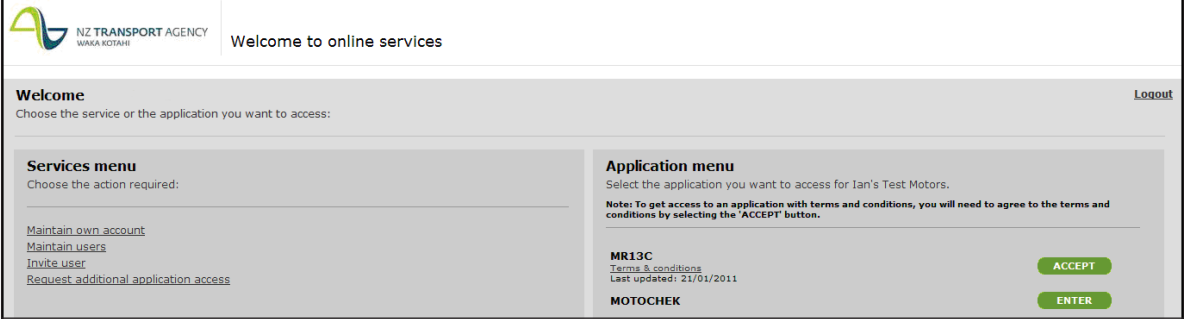| Step	Action
5	Enter your details and your organisation details into the fields on the screen. If the application chosen requires application-specific information to be provided for the NZTA approval process, the required fields will appear on the screen and will also need to be completed. Fields marked with an * are mandatory. **Note:** If you already have an IAM account, your first/middle/last name and date of birth will pre-populate into the registration application form.
6	Enter the characters that are displayed in the Security check section. There is an option to listen to these characters in audio. To do this, click the speaker button next to the display screen.
7	To read the Terms and conditions, click the **Terms & conditions** link at the bottom of the page.
8	Click **Back** to return to the Organisation administrator registration screen.
9	To complete your registration, check the Accept box next to Terms and Conditions, and then click the **Continue** button to display the Registration notification screen. Click **Cancel** if you wish to end the registration process. You will be returned to Access NZ Transport Agency online services screen.
10	Click the Continue button to be returned to the Access NZ Transport Agency online services screen.

REGISTERING TO BE AN ORGANISATION ADMINISTRATOR, CONTINUED

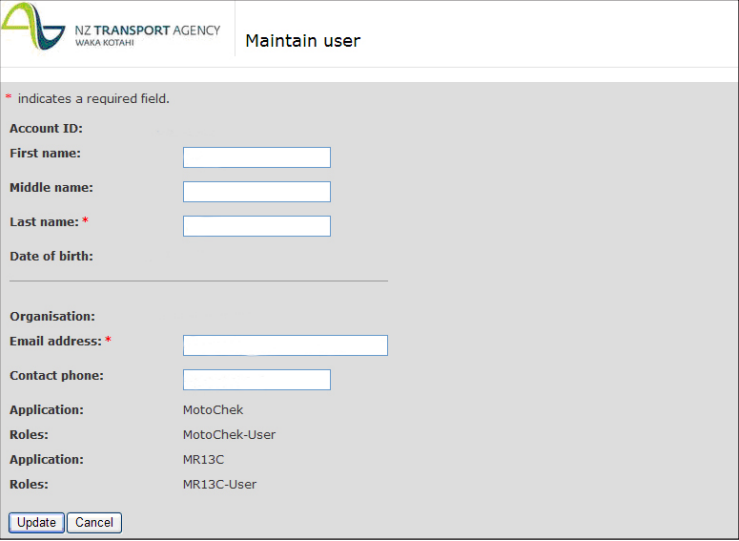| Step	Action
10	An email will be sent confirming the successful submission of your registration request. The format and content of the email are as follows: Subject: NZ Transport Agency - Registration successfully submitted **Organisation administrator registration** Summary of user registration: Submission date: [Registration submission date] First name: [Registering user first name] Middle name: [Registering user middle name] Last name: [Registering user last name] Date of birth: [Applicant date of birth] Email address: [Applicant email address] Access to application: [Access type] Organisation: [Organisation name (as known in IAM)] Organisation identifiers: [NZTA customer number] Next steps 1. You may be contacted by an NZ Transport Agency representative in relation to your application. 2. A decision on your application is expected to take up to 10 working days. 3. We will notify you by email once the process has been completed. If you have a query about your registration application, please contact the NZ Transport Agency on 0800 108 809.
11	You have successfully applied for registration to access the NZTA IAM applications.

LOGGING IN

Step	Action
1	Go to the Access NZ Transport Agency online services screen. You can do this by going to the NZTA website at **www.nzta.govt.nz/online**, then selecting the **Other web services** option.
2	Click the **Login** button to display the RealMe login screen.
3	Enter your RealMe username and password and click the **Login** button. Click **Back to NZ Transport Agency** if you wish to end the log on process. You will be returned to the Access NZ Transport Agency online services screen.
4	If you are registered with only one organisation, go to Step 6. If you are registered with more than one organisation, go to Step 5.
5	The Select organisation screen will display and you must choose the organisation you wish to logon for by checking the relevant box. Click **Continue** and go to Step 6.
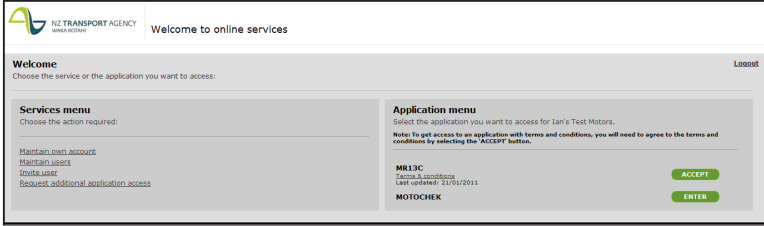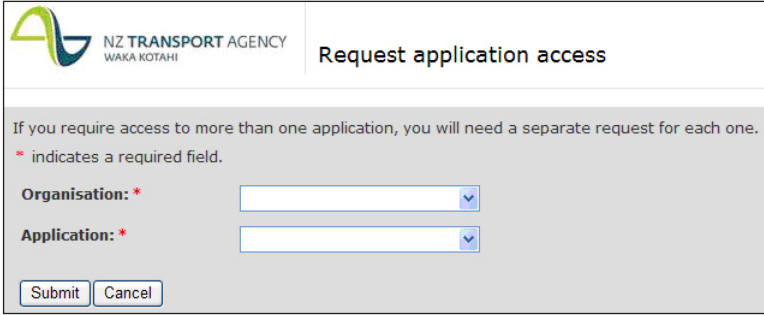
LOGGING IN, CONTINUED

Step	Action
6	The Welcome to online services screen will display. Within the Services menu, the list will contain: • Maintain own account • Maintain users • Invite user • Request additional application access. The Application menu displays the applications you have privileges to access.
7	Click the link from the Services menu or the button from the Application menu for the service or application you want to access. If the application has terms and conditions associated, you can view these by clicking on the **Terms & conditions** link.
8	You have now been successfully logged on and can access relevant services and/or applications in the NZTA IAM application.

MAINTAINING YOUR ACCOUNT

Step	Action
1	Follow the steps above to log in.
2	In the Welcome to online services screen, under the Services menu, click on the **Maintain own account** link.
3	The Maintain user screen will display.
4	You can modify the following details by overtyping with the new details: • First, middle and/or last names • Email address • Phone number.
5	Modify your details and click on the **Update** button to save your changes. Go to Step 6. **Note:** if you do not want to save your changes, click on the **Cancel** button and go to Step 6.
6	You will be returned to the Welcome to online services screen.
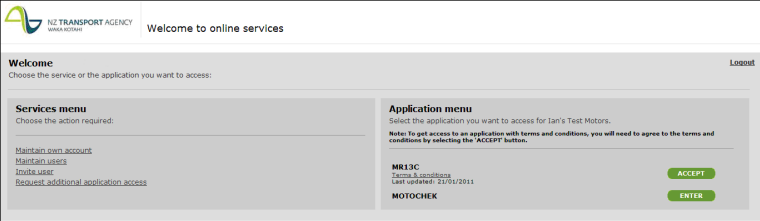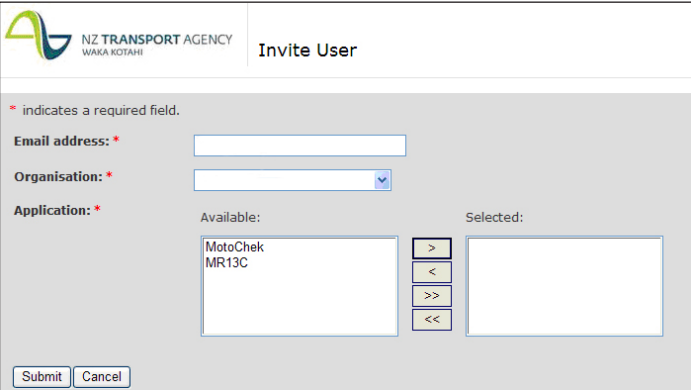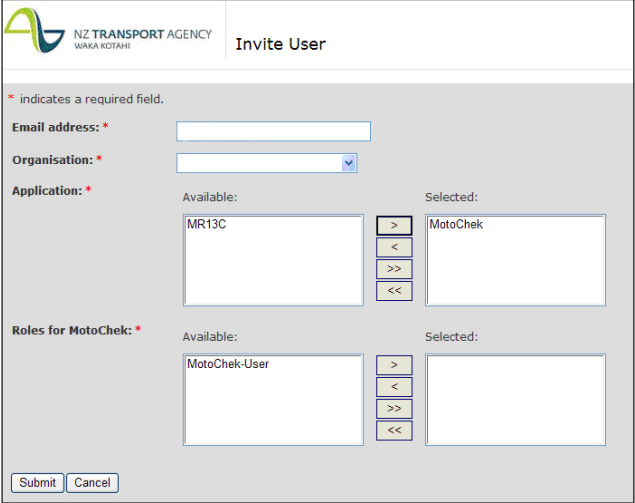
REQUESTING ADDITIONAL APPLICATION ACCESS

Step	Action
1	In the Welcome to online services screen, under the Services menu, click on the **Request additional application access** link.
2	The Request application access screen will display.
3	If you are an Organisation Administrator for more than one organisation, select the relevant organisation from the Organisation dropdown list.
4	From the Application dropdown list, select the application you wish to have access to. If the application chosen requires application-specific information to be provided for the NZTA approval process, the required fields will appear on the screen and will also need to be completed. **Note:** only one organisation and application request can be processed at a time.
5	Click on the **Submit** button to send the request. If you do not wish to send the request, click the **Cancel** button and you will be returned to the Welcome to online services screen.
6	A Request application access notification will display to tell you the request was sent successfully. Click **Continue** to be returned to the Welcome to online services screen.

REQUESTING ADDITIONAL APPLICATION ACCESS, CONTINUED

Step	Action
7	An email will be sent confirming the successful submission of your application request. The format and content of the email are as follows: Subject: NZ Transport Agency - Application access successfully submitted **Organisation administrator application access request** Summary of request: Submission date: [Request submission date] First name: [Requestor first name] Last name: [Requestor last name] Organisation: [Organisation name (as known in IAM)] Organisation identifiers: [NZTA customer number] Next steps 1. You may be contacted by an NZ Transport Agency representative in relation to your application. 2. A decision on your application is expected to take up to 10 working days. 3. We will notify you by email once the process has been completed. If you have a query about your registration application, please contact the NZ Transport Agency on 0800 108 809.

INVITING A GENERAL USER

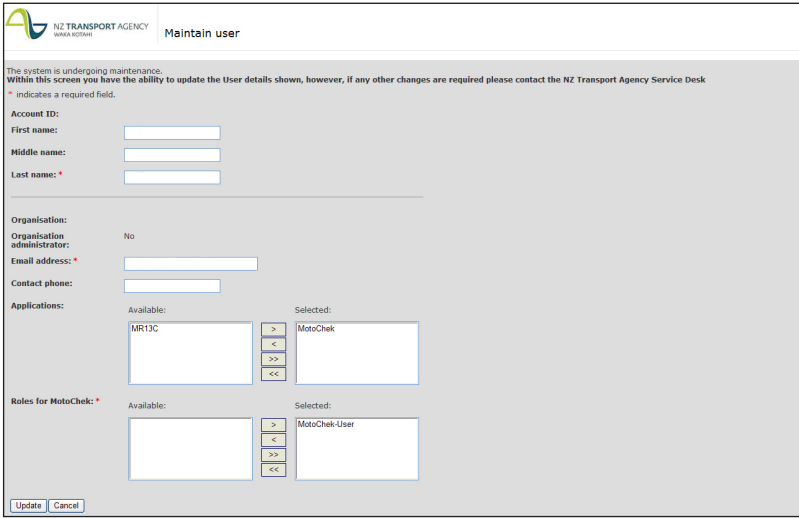| Step	Action
1	In the Welcome to online services screen, under the Services menu, click on the **Invite user** link.
2	The Invite user screen will display.
3	Enter the email address of the person who is to become a general user.
4	From the dropdown list, select the relevant organisation.
5	Click on the relevant application in the Available application section, and move it to the Selected application section by clicking on the **>** button.
6	When you have selected an application, the screen will refresh and will now display the relevant roles available for that application. Click on the relevant roile in the Available roles section, and move it to the Selected roles section by clicking on the **>** button. To remove an application or role, click on the application or role in the Selected section and click the **<** button. To add or remove multiple applications or roles, use the **> >** or **< <** buttons.
7	Click on the **Submit** button to send the invitation. If you do not wish to send the invitation, click the **Cancel** button and you will be returned to the Welcome to online services screen.
8	An invite user notification will display to tell you the invitation was send successfully. Click **Continue** to be returned to the Welcome to online services screen.

MAINTAINING A GENERAL USER'S ACCOUNT

Step	Action
1	In the Welcome to online services screen, under the Services menu, click on the **Maintain users** link.
2	The List users screen will display.
3	Find the user you wish to maintain and click **Maintain user** next to their details.
4	The Maintain user screen displays showing the user's profile details.
5	You can modify the following details by overtyping with the new details: • First, middle and/or last names • Email address • Phone number.
6	To give the user access to a new application, click on the relevant application in the Available application section and click the **>** button. You will then also need to assign the user a role for that application, by clicking on the relevant role in the Available roles section and clicking the **>** button. **Note:** to add or remove multiple applications or roles, use the **> >** or **< <** buttons.
7	To remove the user's access to an application, click on the relevant application in the Selected application section and click the **<** button. **Note:** removal of an application will be automatically remove any associated roles. To remove a role only, click on the relevant role in the Select roles section and click the **<** button.
8	Click on the **Update** button to save the new details. You will be returned to the Welcome to online services screen. If you do not wish to save the new details, click the **Cancel** button and you will be returned to the Welcome to online services screen. **Note:** if you wish to disable/enable or remove a user from the system, email: **IAM.servicetemp@nzta.govt.nz**.

TROUBLESHOOTING

The following error messages may appear when you try to use an NZTA online service.

An application must be selected

This error will be displayed if you have not selected an application.
Click on an application in the Available applications list and then the > button.

An application role must be selected

This error will be displayed if you have not selected an application role.
Click on an application role in the Available roles list and then the > button.

Application error

This error will display if the system has encountered an unexpected error. An exception number will also display.

Click the **Continue** button to return to the Access NZ Transport Agency online services screen and then contact the NZTA on 0800 80 52 63, quoting the exception number.

Date of birth is invalid

This error will display if your date of birth has been entered in a format which is not allowed.
Amend the details by re-entering your date of birth as dd/mm/yyyy or dd-mm-yyyy.

Email address is invalid

This error will display if the email address you have entered is not valid. Email addresses must:

*   contain exactly one '@',
*   contain at least one '.' after the '@',
*   not begin with characters '.' or '@', and
*   not exceed the maximum length of 100 characters.

You must enter a valid email address that meets the criteria above.

Error

This error will be displayed if you have selected your own account to maintain.
To maintain your own account, you must click the Maintain own account link on the Services menu.
Click the **Continue** button to return to the Access NZ Transport Agency online services screen

First/middle/last name is invalid

This error will be displayed if you exceed the maximum length of 20 characters in the First, Middle or Last name field. You will need to amend the details entered.

If the Contact phone number field exceeds its allocated length of 25 characters, a similar message will display.

TROUBLESHOOTING, CONTINUED

First/middle/last name contains one or more of the following invalid characters % & () + = \ : " <>

This error will display if any of the above characters are entered in the First, Middle or Last name field.
Amend the details entered by removing the invalid character.

If an invalid character is entered in the Contact phone number field, a similar message will display.

Inactive account

This error will display if you have successfully logged on through RealMe but your IAM user account is not current. For example, your account has been deleted or your account is in a disabled state.
Click the **Continue** button to return to the Access NZ Transport Agency online services screen and then contact the NZTA on 0800 80 52 63.

Open registration request already exists

This error will display if you have already submitted a registration request and it is currently being processed by the NZTA. You will need to wait until you have a response from the first registration request before you can process another.
Click the **Continue** button to return to the Access NZ Transport Agency online services screen and if you have any queries about the open registration request, contact the NZTA on 0800 80 52 63.

Organisations name must be more than two characters in length

This error will display if the organisation name entered is less than 3 characters in length.
Amend the details by entering an organisation name longer than 2 characters in length.

Please enter...

This error will display if there is application-specific information required for the NZTA approval process and the relevant fields do not have a value entered, or the value that has been entered is incorrect.
Not all applications require specific information and across applications this information may not be standard. Therefore, this error message has been included here as a general error.

Please enter your last name

This error will display if no value is entered in the Last name field.
Amend the details by entering a last name.
If no value is entered in the Email address or Date of birth field, a similar message will display.

Please enter the characters you see in the picture or hear in the audio

This error will display if you have not entered any values in the Security check section in the Enter characters field.
Enter the characters.

TROUBLESHOOTING, CONTINUED

Please enter the user's email address

This error will display if no value is entered in the Email address field.
Amend the details by entering the user's email address.

Possible error message

This error will be displayed if you have selected your own account to maintain.
To maintain your own account, you must click the Maintain own account link on the Services menu.
Click the **Continue** button to return to the Access NZ Transport Agency online services screen.

Session has expired

This error will display when you have not been active within the RealMe session for an extended period of time.

Click the **Continue** button to return to the Access NZ Transport Agency online services screen, where you will need to log on again.

Alternatively, you can contact the RealMe Help Desk on 0800 664 774 if you have any queries regarding the message displayed.

This error will also display when you have not been active within the IAM account session for an extended period of time. You have effectively been logged out and will have to return to the Access NZ Transport Agency online services screen to log on again.

Sorry, your login attempt was unsuccessful, please check your username or password.

This error will display if the username and/or password you have entered are invalid or incorrect.

Re-enter your RealMe username and password, or if you have forgotten them click the link **I forgot my username** or **I forgot my password**.

If you still receive an error, contact the RealMe Help Desk on 0800 664 774.

Terms and conditions have not been accepted. If you do not wish to continue with your registration, select the Cancel button

This error will display if you have not checked the Accept box next to the Terms and conditions link.
Read the terms and conditions, and, if you accept them, check the Accept box next to Terms and conditions.
If you do not accept, you will be unable to proceed any further. Click **Cancel** to return to the Access NZ Transport Agency online services screen.

The RealMe login service is currently unavailable.

This error will display if the RealMe login service is currently unavailable. Close the browser and try again later.
For service availability information you can call 0800 664 774.

If you have further queries, call our contact centre on 0800 108 809 or write to us:

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This publication is also available on NZ Transport Agency's website at **www.nzta.govt.nz**

NZ TRANSPORT AGENCY
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New Zealand Government

OUR CONTACT DETAILS

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