

# Identity and access management (IAM) organisation administrator guidelines

June 2013



New Zealand Government

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## **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 IAMprotected 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<sup>®</sup> 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 <b>www.nzta.govt.nz/online</b> and clicking on <b>Other web set</b>			
2	Click on the <b>Request access</b> button to display the Application access screen.		
3	Select the application you wish to access from the dropdown list and click the <b>Login</b> button to display the RealMe login screen. Click <b>Cancel</b> if you wish to end the registration process. You will be returned to the Access NZ Transport Agency		
	online services screen.		
	Application access		
	Thank you for requesting access to the NZ Transport Agency online services. If you are the delegated administrator for your organisation, please select the application you want to access from the list below and select 'Login'. If you are not the administrator for your organisation, please select 'Cancel'. Please note: To continue with your access request, you will be required to log in or register for a RealMe login, if you do not already have one. Select the NZ Transport Agency application you want access to Select an application Cencel		
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 MZ Transport Agency to you can login with RealMe Username I forgot my username		
	In the Access N2 Transport Agency online services screen.         Password       I forgot my password         Login       Create your RealMe login now		

## **REGISTERING TO BE AN ORGANISATION ADMINISTRATOR, CONTINUED**

Step	Action				
5	Enter your details and your organisation	NETRANSPORT AGENCY Monostroni			
	details into the fields on the screen. If the application chosen requires	Enter registration details			
		Ever or amend the following details to request to be an administrator for your organisation. You may be contacted directly in respect of your application.  denotes a mandatory field.			
	application-specific information to be	Førstanne: Midde name: Last name: •			
	the required fields will appear on the screen	Date of birth: Email address; Contact phone number:			
	and will also need to be completed. Fields	Application takess: MOTOOLEK Organisation anae:			
	marked with an ^ are mandatory.	IVIA ostomer number: Netocheka application pact. Netocheka application pact.			
	<b>Note:</b> If you already have an IAM account, your first/middle/last name and date of birth will pre-populate into the registration	On completion of this online registration and application pack you will be advised of your application outcome.			
		Security check This dreac helps to ensure a person, not automated program, is registering for access.			
	application form.	Enter the dharactery you see in the picture:			
		Enter daracters			
6	Enter the characters that are displayed in the Sec	curity 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 <b>Term</b>	<b>s &amp; conditions</b> link at the bottom of the page.			
8	Click <b>Back</b> to return to the Organisation adminis	trator registration screen.			
	Online service organisation administrator user terms & conditions				
	Terms and conditions for the Administrator of Identity and Access Management System				
	It is important for you to carefully read these terms and conditions of use in relation to the provision of the N2 Transport Agence system. The terms and conditions form the agreement between you as a customer and the N2 Transport Agency as provider of these se	y Menity and Access Management			
	become an Administrator of the Identity and Access Management system, you acknowledge and accept these terms and condit While we will endeavour to ensure that the Identity and Access Management system is a secure system within which you can c macautement resumement via the interest. It is to incontant that wince work only add holdselver, as via also need to take	lons. September Mantily and access september for una rum PP anti-unix. ■			
	DACK				
9	To complete your registration, check the Accept box next to Terms and Conditions, and then click the <b>Continue</b> button to display the Registration notification screen.				
	button to display the Registration notification sci	reen.			
	Click <b>Cancel</b> if you wish to end the registration p services screen.	process. You will be returned to Access NZ Transport Agency online			
10	Click the Continue button to be returned to the A	Access NZ Transport Agency online services screen.			
	Registration notification				
Registration successfully submitted					
	First name: [Applicant first name] Midde name: [Applicant midde name] Last name: [Applicant last name]				
	Date of birth: [Applicant date of birth] Email address: [Applicant email address] Application to access: [IVZT Applicantemia] Organisation: [Organisation name]				
	Organisation Identifiers [Application specific organisation identifiers]				
	A confirmation email will be sent to the above email address as a record of your registration request. Next staps:				
	<ol> <li>A decision on your application is expected back to use to 10 working days.</li> <li>We will notify you by enail once this process has been completed.</li> </ol>				
	CONTINUE				

## **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 registra	tion:			
	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]		[Applicant email address]			
	Access to application:[Access type]Organisation:[Organisation name (as known in IAM)]				
	Organisation identifiers:	[NZTA customer number]			
	Next steps				
	<ol> <li>You may be contacted by an NZ Transport Agency representative in relation to your application.</li> <li>A decision on your application is expected to take up to 10 working days.</li> <li>We will notify you by email once the process has been completed.</li> <li>If you have a query about your registration application, please contact the NZ Transport Agency on 0800 108 809.</li> </ol>				
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 <b>www.nzta.govt.nz/online</b> , then selecting the <b>Other web services</b> option.		
Access NZ Transport AGENCY ACCESS NZ Transport Agency online services			
	If you are already registered to use a NZ Transport Agency online service, select the 'Login' button to proceed.  If you are already registered to use a NZ Transport Agency online service, select the 'Login' button to proceed.  Login with RealMe  Login 2  What's RealMo?		
	If your organisation has not previously used our online services, select the 'Request access' button to register your organisation. This registration must be carried out by the person in your organisation delegated to be the administrator for the NZ Transport Agency online services.		
	Select the 'Exit' button to go to the NZ Transport Agency website.		
2	Click the <b>Login</b> button to display the RealMe login screen.		
	NZ TRANSPORT AGENCY WAXA ROTAHI		
	You have been transferred here from NZ Transport Agency so you can login with RealMe®.		
	Username I forgot my username Password I forgot my password Login		
3	Enter your RealMe username and password and click the <b>Login</b> button.		
	Click <b>Back to NZ Transport Agency</b> 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 <b>Continue</b> and go to Step 6.		
	NZ TRANSPORT AGENCY Select organisation		
	Select an organisation The organisations that you are authorised to act on behalf of are listed below:		
	ABC Organisation     XYZ Organisation		
	CANCEL		

## LOGGING IN, CONTINUED

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Step	Action		
6	The Welcome to online services screen will display.		
	<ul> <li>Within the Services menu, the list will contain:</li> <li>Maintain own account</li> <li>Maintain users</li> <li>Invite user</li> <li>Request additional application access.</li> </ul>		
	The Application menu displays the applications you have privileges to access.		
	Welcome		
	Choose the service or the application you want to access:		
	Services menu         Application menu           Choose the action required:         Select the application you want to access for Ian's Test Motors.		
	Maintain own account Maintain users		
	Invite user MR13C <u>Request additional application access</u> <u>Request additional application access</u> MOTOCHEK ENTER		
	to access.		
	If the application has terms and conditions associated, you can view these by clicking on the <b>Terms &amp; conditions</b> lin		
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 <b>Maintain own account</b> link.		
3	The Maintain user screen will display.		
	Maintain user		
	<ul> <li>indicates a required field.</li> </ul>		
	Account ID: First name:		
	Middle name:		
	Last name: *		
	Date of birth:		
	Email address: *		
	Contact phone:		
	Application: MotoChek		
	Roles: MotoChek-User Application: MR13C		
	Roles: MR13C-User		
	Update Cancel		
4	You can modify the following details by overtyping with the new details:		
	<ul> <li>First, middle and/or last names</li> <li>Email address</li> <li>Phone number.</li> </ul>		
5	Modify your details and click on the <b>Update</b> button to save your changes. Go to Step 6.		
	<b>Note:</b> if you do not want to save your changes, click on the <b>Cancel</b> 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 <b>Request additional application access</b> link.		
	NETRANSPORT AGENCY Welcome to online services		
	Welcome Lasent Choose the service or the soptilation you want to access:		
	Services menu Choose the action required: Seal the application you want to access for Law's Test Motors.		
	Maritan sum accurt Maritan utera Zindt sudar		
2	The Request application access screen will display.		
	Request application access		
	If you require access to more than one application, you will need a separate request for each one.		
	* indicates a required field.		
	Organisation: *		
	Application: *		
	Submit Cancel		
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 <b>Submit</b> button to send the request.		
	If you do not wish to send the request, click the <b>Cancel</b> 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 <b>Continue</b> 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]		[Requestor first name]		
		[Requestor last name]		
	Organisation:[Organisation name (as known in IAM)]Organisation identifiers:[NZTA customer number]			
	<ol> <li>Next steps</li> <li>You may be contacted by an NZ Transport Agency representative in relation to your application.</li> <li>A decision on your application is expected to take up to 10 working days.</li> <li>We will notify you by email once the process has been completed.</li> <li>If you have a query about your registration application, please contact the NZ Transport Agency on 0800 108 809.</li> </ol>			

## **INVITING A GENERAL USER**

Step	Action		
1	In the Welcome to online services screen, under the Services menu, click on the <b>Invite user</b> link.		
	Welcome to online services		
	We know         Welcome to online services           Use one         Least		
	Services menu Cross the ador regured Select the application you want to access for tan's Test Motors.		
	Anders Treget access to an application with terms and conditions, you will need to     Substrain open accounts     Maritain users     Maritain users     MR13C	o agree to the terms and	
	Inizia Lass. Personal auditation access More auditation access MOTOCHEK	ENTER	
2	The Invite user screen will display		
	waka kotaeli Invite User		
	* indicates a required field.		
	Organisation: *		
	Application: * Available: Selected:		
	MotoChek MR13C <		
	>> <		
	Submit Cancel		
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		AGENCY Invite User
	for that application.		
	Click on the relevant roile in the Available roles section,	<ul> <li>indicates a required field.</li> <li>Email address: *</li> </ul>	
	and move it to the Selected roles section by clicking on	Organisation: *	
	the > button.	Application: *	Available: Selected: MR13C > MotoChek
	To remove an application or role, click on the application		
	or role in the Selected section and click the $\leq$ button.		
	To add or remove multiple applications or roles, use	Roles for MotoChek: *	Available: Selected: MotoChek-User >
	the >> or < < buttons.		
		Submit Cancel	
7	Click on the <b>Submit</b> button to send the invitation.		
	If you do not wish to send the invitation, click the <b>Cancel</b>	button and you	will be returned to the Welcome to online
8	An invite user notification will display to tell you the invita	ation was send	successfully. Click <b>Continue</b> to be returned
	to the Welcome to online services screen.		successivity, energy continue to be returned

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## **MAINTAINING A GENERAL USER'S ACCOUNT**

Step	Action				
1	In the Welcome to online services screen, under the Services menu, click on the <b>Maintain users</b> link.				
2	The List users screen will display.				
	The system is undergoing maintenan If you wish to disable/enable a use	ce. r or remove them from your of	rganisation, please contact the NZ Transport Agency Service Desk		
	Organisation: Ian's Test Motors 🖌				
	Admin         First name           Yes         Fred	Admin         First name         Last name         Email           Yes         Fred         Smith         fred.smith/@iansmotors.co.nz         Maintain User			
	Phil	Hyde	phil hyde @iansmotors.co.nz		
	Cancel				
3	Find the user you w	ish to maintain a	and click <b>Maintain user</b> next to their details.		
4	The Maintain user s	screen displays s	showing the user's profile details.		
	NZ TRANSPORT AGENCY Maintain	user			
	The system is undergoing maintenance.	e liser details shown however if any other	ar changes are nonlined plasse control the N7 Transport Agenery Specific Dask		
	* indicates a required field. Account ID:	e oser uetans shown, however, if any othe	ы опициез иле теринези рисски, силлок иле на, типерика уделатаке и реж		
	First name:				
	Last name: *				
	Organisation: Organisation No administrator:				
	Email address: * Contact phone:				
	Applications: Available:	Selected:			
		< >>			
	Roles for MotoChek: * Available:	Selected:			
		MotoChek-User			
	Update Cancel				
5	You can modify the following details by overtyping with the new details:				
	First, middle an	id/or last names	5		
	<ul> <li>Email address</li> <li>Phone number.</li> </ul>				
6	To give the user acc	ess to a new ap	plication, click on the relevant application in the Available application section and		
	click the $>$ button.				
	rou will then also n	ieed to assign th	ie user a role for that application, by clicking on the relevant role in the Available		
	roles section and cl	ICKING the <b>&gt;</b> but	tton.		
	Note: to add or rem	nove multiple ap	plications or roles, use the $>>$ or $<<$ buttons.		
7	To remove the user'	s access to an ar	pplication, click on the relevant application in the Selected application section and		
	click the <b>&lt;</b> button.				
	Neter romanal of a		he automatically remove any accepted relat		
	NOTE: removal of ar	i application will	i de automátically remove any associated roles.		
	To remove a role on	lly, click on the r	elevant role in the Select roles section and click the < button.		
8	Click on the <b>Update</b>	e button to save	the new details. You will be returned to the Welcome to online services screen.		
	If you do not wich t	o save the now o	details, click the <b>Cancel</b> button and you will be returned to the Welcome to online		
	services screen.	o save the new (	actails, ener the <b>Cancer</b> button and you will be returned to the vvelcome to online		
	Notes if you wish to	dicable large -	or remove a user from the system amaily IAM sourcestance and a		
	If you do not wish to services screen.	o save the new o	details, click the <b>Cancel</b> button and you will be returned to the Welcome to online		
	Note: If you wish to	uisable/enable	or remove a user from the system, email. <b>IAM.Servicetemp@nzta.govt.nz</b> .		

## 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:

NZ Transport Agency Private Bag 11777 Palmerston North 4442

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



New Zealand Government

#### **OUR CONTACT DETAILS**

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