

Administrators: update your users

Users

An Administrator can create Users and associate them with any established Branch. A Branch Administrator can also create User IDs and they will automatically be associated with that Branch.

What you need to know

This section is intended for Administrators. Only Users with Administrator rights will have the necessary access to make the changes described here. The information below will step you through how to:

- [Create a user](#)
- [Unlock a user's ID](#)
- [Close a user's ID](#)
- [Amend restrictions on a user's ID](#)
- [Update all user details](#)

Step by step instructions

How to create a user

An Administrator can create any number of Users, begin by visiting any one of our websites.

1. Log on (using your nine character User ID and your seven character password).
2. Select **User Administration - User Details - Create User**.
3. Complete the online form headed **User Administration**: Fields marked with a red asterisk * must be completed.
 - **First Name(s)**
 - **Last Name**
 - **Password**: You must enter your password in both password fields as a check. Your password must have at least seven characters, including at least one alphabetic (A-Z) and one numeric character (0-9), no spaces or punctuation.
 - **Expire password after** - If you want your password to expire after a specified number of days, check this radio button, then enter the number of days after which the password should be expired. You can choose any number between 1 and 99 days. Alternatively, if you do not want your password to expire choose **Password never expires**.
 - **Telephone Number**: Use all three fields supplied. In the first field choose the appropriate country code (e.g. +64 for New Zealand), in the second field enter the area code and in the third field the telephone number.
 - **Fax Number** (optional): Use the same format as for the Telephone Number field.
 - **Email Address**
 - **Include user's password in email** (optional): We will email confirmation of the Logon details to the new User on completion of your registration. If you want this email to include the User's password, tick the box next to this field. Users can go online and change their password at any time and we recommend that they do this as soon as their new User ID is activated.
 - **Set user up as an Administrator**: Defaults to No but if you would like this new User to be an Administrator for your Customer or Branch change this field to **Yes**.
 - **Status**: Defaults to Active, this can later be changed as needed.
 - **Branch**: Users can either be assigned to a Branch, or left unassigned. If left unassigned, they remain associated with the customer. If the User is to be assigned to a Branch, select a Branch from the drop-down list.
 - **Default PPSR Secured Party Group**: Complete these fields only if the User will be registering financing statements on the Personal Property Securities Register (PPSR). For more information on these settings refer to the [PPSR website](#).
 - **Sites and Services**: This section allows you to restrict the sites and services that Users can access.
 - To allow all options, leave the boxes blank.

- To restrict access to particular websites or services, use the **Add** buttons to display a pop-up list of sites or services and click on an entry to choose it. To choose multiple entries, hold down the Control [Ctrl] key and then click on each entry you want to select.
 - Select **OK** to exit the pop up list and insert the chosen options in the box. The User will be restricted to the sites and services you select.
 - The settings you choose here override those set at Customer or Branch level.
4. Once the 'User Administration' form is completed click **Save** to continue.
 5. We will display a message on screen to confirm that the User's information has been updated. We will also email the User ID to the address supplied (the email will include the password, if you chose this option). Users should take care to keep this in a secure place as they will need it to access our websites (especially the PPSR website). New Users can access our websites as soon as they have been allocated their User ID and password.



Note

The **User Administration** option is located under **My Tools** on some websites.

How to unlock a user ID

A User ID will be locked if an incorrect password is entered three times when logging on. An Administrator can unlock a User, begin by visiting any one of our websites.

1. Log on (using your nine character User ID and your seven character password).
2. Select **User Administration - User Details - Modify User**.
3. **Amend Status:** The status will display as **MAX Failed Logons**, from the drop-down list choose **Active** - to reactivate the User. Once the User Administration form is completed click **Save** to continue.
4. We will display a message on screen to confirm that the User's information has been updated.
5. Select **Continue** to return to the list of Users.



Note

The **User Administration** option is located under **My Tools** on some websites.

How to close a user ID

An Administrator can close a User ID. Begin by visiting any one of our websites.

1. Log on (using your nine character User ID and your seven character password).
2. Select **User Administration - User Details - Modify User**.
3. **Amend Status To:** Defaults to **Active**, from the drop down list choose **Closed** to close a User ID for a person who has left your organisation or who no longer needs their User ID.
4. Once the User Administration form is completed click **Save** to continue. We will display a message on screen to confirm that the User's information has been updated.
5. Select **Continue** to return to the list of Users.



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How to amend restrictions on a user ID

An Administrator can restrict a User's access to our websites or services. When a new option has been added to our services list, it is important to note that Users with restricted access will not be automatically granted access to the any new service. An Administrator can alter those restrictions for a User's ID at any time. Begin by visiting any one of our websites.

1. Log on (using your nine character User ID and your seven character password).
2. Select **User Administration - User Details - Modify User**.

3. Under **Sites and Services** remove any services or websites you wish to restrict access too. Add any websites or services you wish to provide access to. To allow all options simply leave both boxes blank.
4. Select **Continue** to return to the list of Users.



Note

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How to update all user details

An Administrator can modify details for their Users. Begin by visiting any one of our websites.

1. Log on (using your nine character User ID and your seven character password).
2. Select **User Administration - User Details - Modify User**.
3. If you have more than one User we will display a list of all Users, select the one you want to update and you will see their online 'User Administration' form.
4. Update the information that has changed.
5. Select **Continue** to save your changes and return to the list of Users.



Note

The **User Administration** option is located under **My Tools** on some websites.