IANZ Portal
User Instructions

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A   Introduction

The IANZ Portal is a document exchange platform for use between IANZ and its clients, stakeholders and other interested parties.

Please use these instructions to help you in your use of the IANZ portal, which has been set up to assist with the exchange of documents.

In these early stages the focus is on:

a) Exchanging files with IANZ clients (via their appointed Authorised Representatives)

b) Exchanging files with Technical Experts (external technical personnel) participating in IANZ assessments

c) Exchanging files with IANZ Professional Advisory Committee and Council members

d) Exchanging files with external bodies e.g. regulators

Access to the portal is currently by 'invitation' only following discussions with IANZ staff.

Note: The left side of the web portal viewing area is termed the **Task Area**.
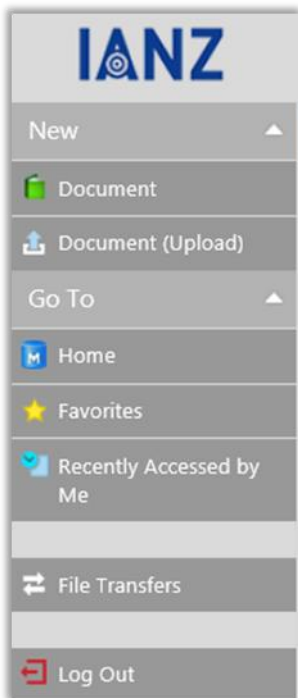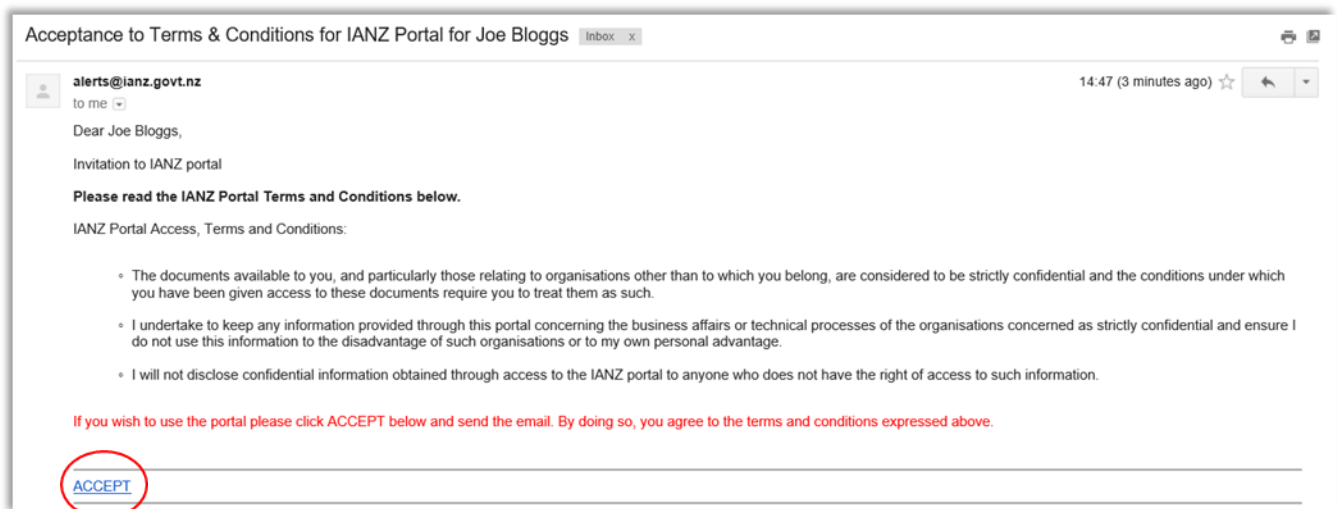
B   Access to the IANZ Web Portal

1. Expect an email invitation to the portal from **alerts@ianz.govt.nz.**

    Note: You may need to check your 'junk email' if no invitation arrives as expected.

2. Read the Terms and Conditions, click **ACCEPT.**

3. A reply email will be produced by IANZ - (please **do not change the email subject line** as this is the unique identifier).

    Note: If there is no subject line, **please leave this blank** as the IANZ Coordination Services team will match your identification manually in the system (as some email domains appear to be automatically stripping out the subject line).
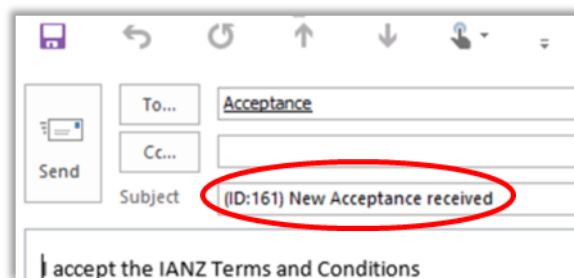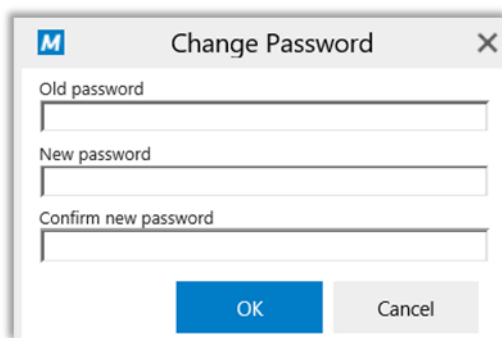

4. **Send** the acceptance email.

5. IANZ will approve your portal access and send you an email stating: **Access to the IANZ Portal has been approved**, which provides your portal credentials that include your access login and temporary password.
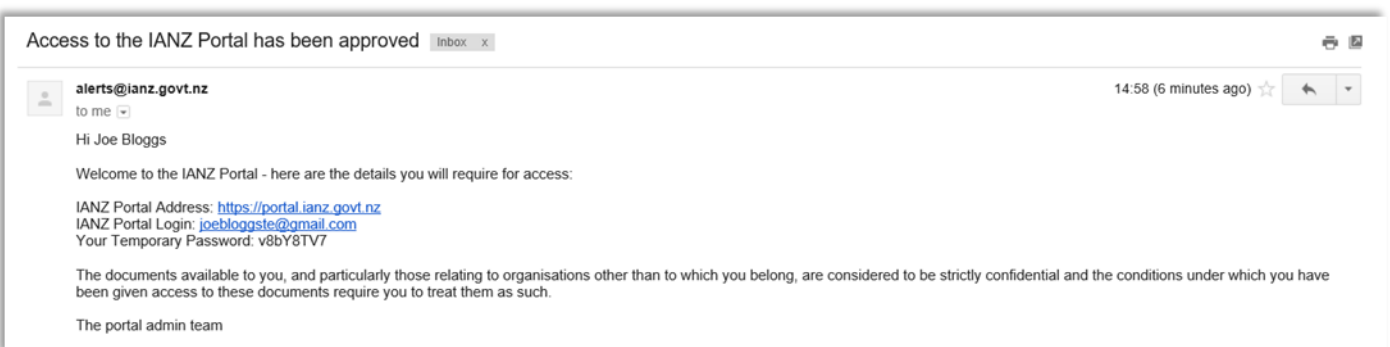

6. Click the **IANZ Portal Address** link (or copy the address to your web browser).

7. Enter your **IANZ Portal Login** (your email address), then enter your **Temporary Password.**

8. We suggest you change the temporary password to something you can remember - **click your name,** select **Change Password** and follow the instructions.
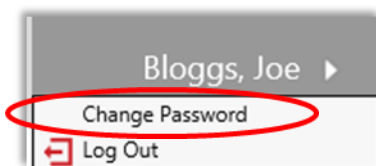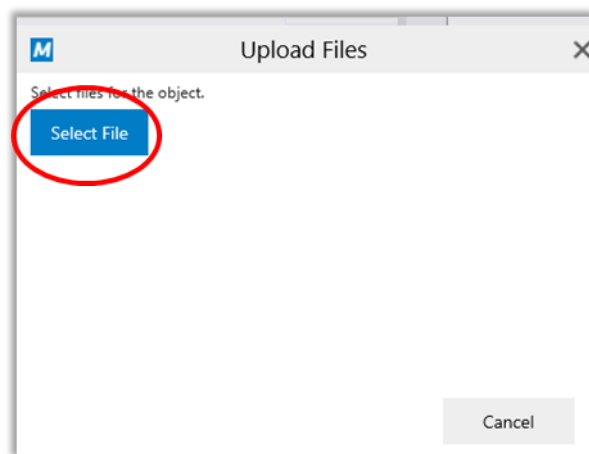
## C   How to upload a file to IANZ via the portal

1. Log in.

2. Select **Document (Upload).**
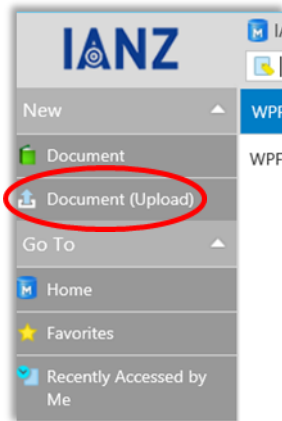
3. Click **Select File** from the **Upload Files** dialogue box.

4. Browse (in your local system) to the file/s you would like to upload, select your file/s and click **Open.**

    Note: Please **do not** load the following file types into the portal:

    7z, bat, chm, class, cpl, dll, encrypted-7z, encrypted-rar, encrypted-zip, exe, flash, hlp, hta, jar, msi, Multi-Level-Encoding, ocx, PE, pif, rar, scr, tar, torrent, vbe, wsf

5. The **Upload Files** dialogue box will appear.

    Note: In this example Joe Bloggs, the Technical Expert (TE), is returning the completed TE Confidentiality Declaration and TE Questionnaire for the assessment to IANZ.

6. Use **Select File** to add any additional files, then click **OK**.
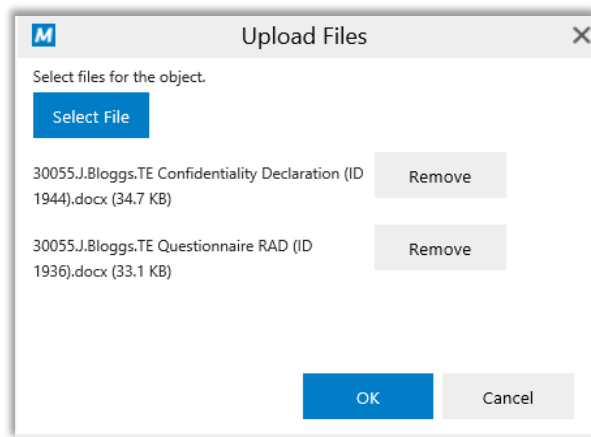
7. If you are uploading multiple documents, a dialogue box will appear with the following question:

    "Do you want to create multiple documents or a single multi-file document?"

    - Select **multiple documents** if the files are for **different IANZ staff members or assessments.**

    - Select **single document** if the files are for the **same IANZ assessor / assessment.**
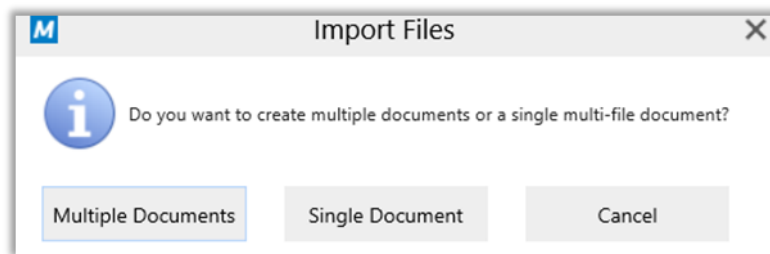
    Note: The IANZ document management system, M-Files, of which the document portal is part, does not support the Windows system of a directory of folders. Attempting to upload a folder of multiple files generally results in all files be saved independently, and if you have multiple folders, the folder structure is lost and it becomes a 'sea of documents'. To retain an organised structure of folders of your upload, the upload should first be zipped. See point 13 below.

8. You will be presented with information to complete.

        Note: The file name is pre-populated if you are **returning** an IANZ-produced form

        Note: If uploading files from your management system (or uploading scanned in documents) for an IANZ assessment, please ensure all files are appropriately named

9. Select the required **Class** from the two drop down options:

    (a) Upload to Staff

    Determine which staff member to upload files to, either:

    (i)   The Lead Assessor, or Coordination Officer - when uploading assessment material/files

    (ii)   Another IANZ staff member (who sent these instructions) - when uploading other types of non-assessment related files

    - Select **Upload to Staff** from the drop down list (either Lead Assessor or Coordination Officer). (Please use the Upload to Staff option if you are lodging an Application for Special Assessment and supporting documentation.)

    - **Select the name** of the IANZ staff member from the drop down list or simply start typing their name, then select the relevant person.

    - Ensure **Check in immediately** is selected.

    - Add a **Description** if desired, e.g. type of assessment the file is for.

- **Create.**

- You have now successfully uploaded the file/s via the portal to the IANZ staff member.

- An **auto-notification** will be produced by the portal to advise the IANZ staff member that you have uploaded portal documents for them.

  When you first start using the Portal we recommend that you also email the IANZ staff member advising them that you have uploaded a document.

(b) Upload to WPF

Note: This option is only available if you've previously used the portal to download material from IANZ for that particular assessment, otherwise the record doesn't exist.

WPF Each IANZ assessment has a unique number called the Work Planning Form **(WPF)** number, which is part of the IANZ document name and may also be located in the bottom left footer of forms and letters.

- Select **Upload to WPF** from the drop down list, and select **Check in immediately.**

- **Select the WPF number** - the list of WPFs is filtered to your assessments.

- Use the drop down arrow to select the matching WPF (or simply start typing the number – i.e. the WPF number is the first 5 digits of the document name: in this case the WPF = 30055).

- Ensure **Check in Immediately** is ticked (as failure to do so will result in an auto-prompt to check the document in when you log out).

- Confirm autofill – Select **Yes,** which will add the IANZ Lead Assessor.

- Add a **Description** if desired, i.e. what the files are for.

- Ensure **Check in Immediately** is ticked (as failure to do so will prompt you to check the file in when you log out).

- **Create** (or **Create All** if uploading multiple files).

- You have now successfully uploaded the file/s via the portal to the WPF and an automatic email notification will be sent to the IANZ Lead Assessor.

10. To view files you have uploaded to the portal, select **Home**, then **Uploaded Documents.**

11. Log out of the portal by either:

- Click the **Log Out** task area option, or
- Click your name (on right hand of screen), then select the **Log Out** option.
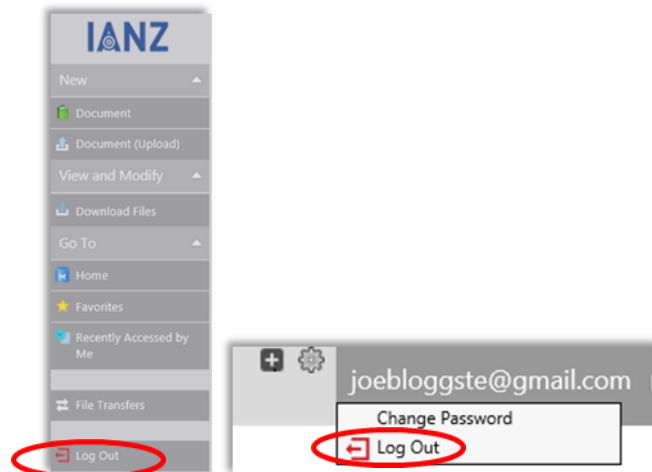
12. If the following question appears on logging out, please select **Check In**
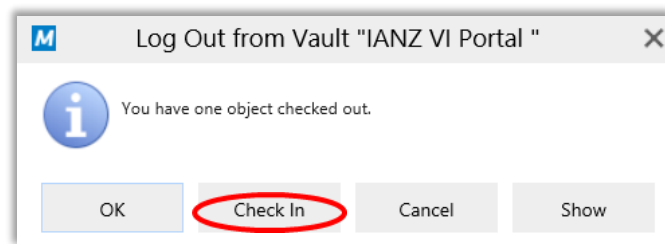
Important Note: If you close your web browser <u>without logging out</u>, and <u>without checking the document in</u>, the upload will be <u>unsuccessful</u>.

13. Sending Multiple Folders via Zip File

Should you want to send multiple folders to IANZ staff, please select all folders and right click, go to **Send To** and select **Compressed (zipped) folder**. Once done please upload the zip file.

D   How to download a file from IANZ via the portal

1. Select the file/s you would like to download (click the item/s)

    Note: You need to select a file **before** you can view the Download File option (i.e. the download file option is context sensitive)

    Note: You can select and download all the files at once, if you choose:

    - Select the first file.
    - Wait for it to load in the preview pane.
    - Continue selecting remainder of files to download.

2. Select **Download File.**

    In the following example, assessment materials (relating to WPF number 30055) have been published via the portal to Joe Bloggs (the Technical Expert) by IANZ.

    Note: Each IANZ assessment has a unique number called the Work Planning Form (WPF) number which is part of the IANZ document name and may also be located in the bottom left footer of forms and letters

> These technical expert file names are made up of 3 parts:
> Work Planning Form Number | Technical Expert name | File name

3. If you are using Windows there will be the option to save the file

    - Click **Save** and the file will be stored onto your computer using your local settings for the file destination

4. **Log out** of the portal by either:

    - Click the **Log Out** task area option **or**
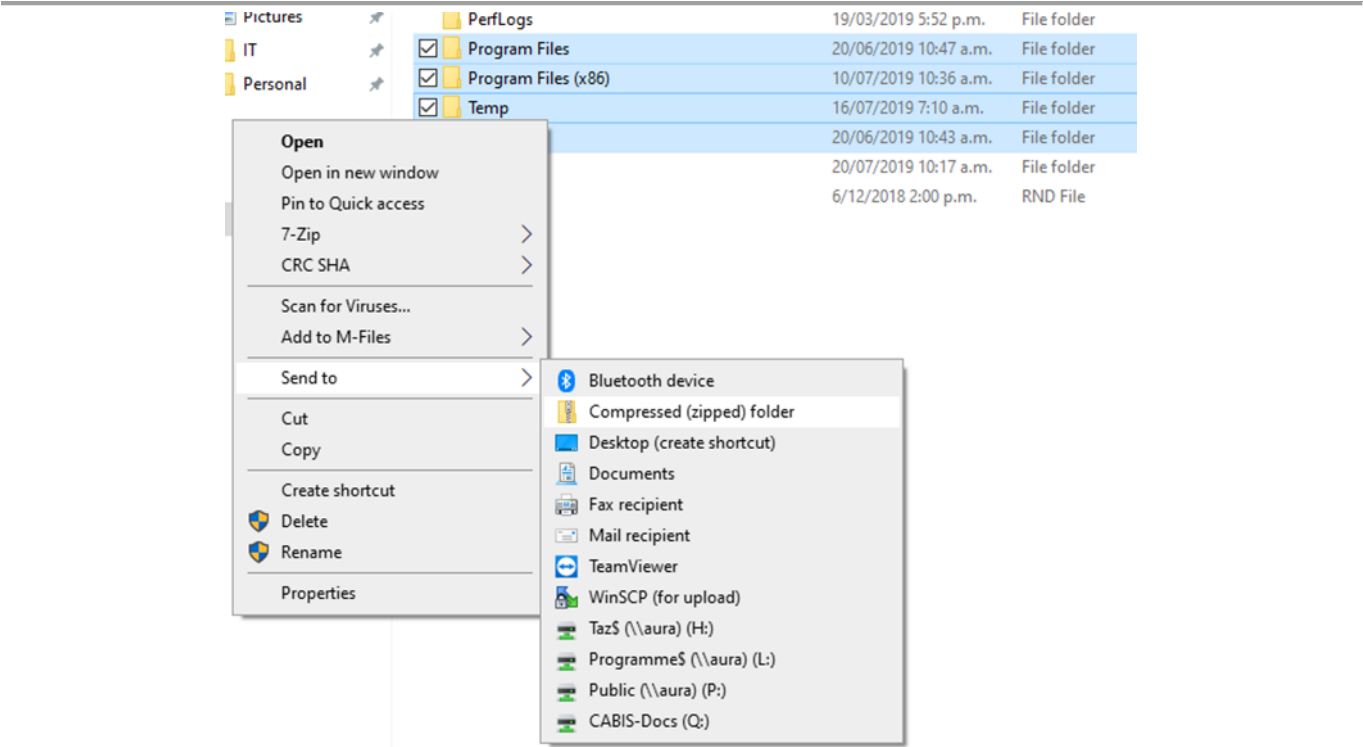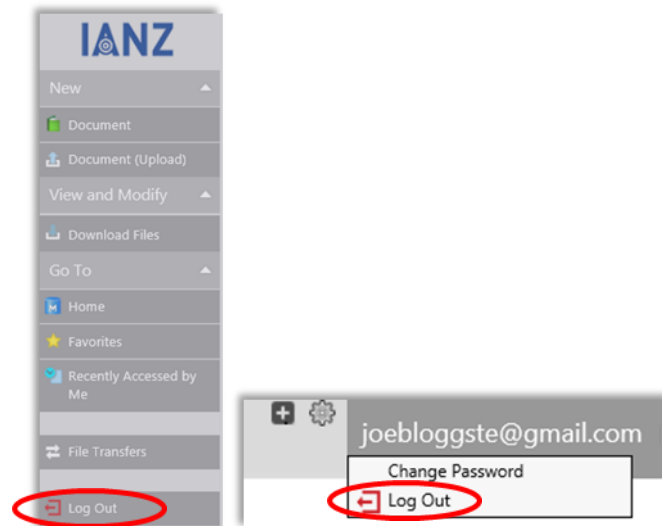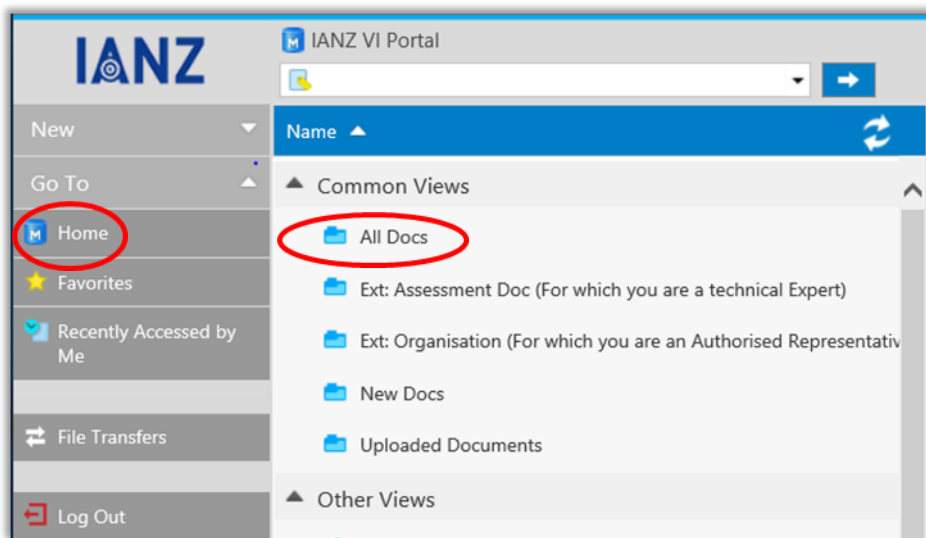   - Click your name (on right hand of screen), then select the **Log Out** option

5. When you next log in:

   • The default screen will display any **NEW** documents available for you to download.

   • Any files you have <u>previously downloaded</u> will not be visible on this list.

6. To view previously downloaded files:

   • Select **Home.**

   • Select **All Docs** under the **Common Views.**

E   Other views

If you click the 'Home' screen icon, these are the views available:

All Docs
A list of all documents not yet archived.

Ext: Assessment Doc
All documents received where you are the Technical Expert.

Ext: Organisation
All documents received where you are the Authorised Representative.

New Docs
All new documents, which have not been downloaded.

Uploaded Doc
All documents you have uploaded.

'Other Views'
Used by IANZ staff.

Please offer any feedback to info@ianz.govt.nz to assist us in making the portal use as user friendly as possible.