Information Provision Platform

User guide

for

information providers

Table of Contents

Overview

About this guide	This guide is designed to assist staff at organisations submitting data or information to the Electricity Authority (Authority) using the Authority's Information Provision platform (platform). The user guide is divided into three distinct sections: • Using the platform to submit data or information • Appendix A describes how to change user account details. Users are referred to as Respondents • Appendix B contains information for administrators, or what we refer to as the Principal respondent.
Platform purpose	The Information Provision platform is a secure, web-based application designed to make it easy for organisations to submit information to the Authority in the required format. The platform and the underlying data stores are hosted in the Authority's Microsoft Azure environment. Modern authentication and security protocols have been utilised to ensure all submitted information is protected and can only be accessed by authorised Authority personnel. Independent security audits are undertaken annually.
Submissions	Each set of data or information collected by the Authority is referred to as a submission. A submission is therefore nothing more than a set of questions where the answers may take the form of: • numerical or categorical data • a short narrative • specific documents.

Respondents	Two specific roles are defined for platform users – **Principal respondent** and **Respondent** – and are referenced throughout this document. There can be up to two Principal respondents per organisation providing information to the Authority. They are responsible for managing users, ie, Respondents, and the configuration of automated email communications with the Authority, ie, notifications (see Appendix B). There may be up to five Respondents per organisation. Respondents are responsible for compiling and submitting the required information on behalf of their organisation. Principal respondents can also make submissions. Organisations should ensure that onboarding and offboarding processes recognise that Principal respondent and Respondent details are updated when staff join or leave an organisation.
Registration	A Respondent may be invited to register for access to the Information Provision platform by either the Principal respondent or the Authority. Either way, the Respondent receives an email containing a link that when clicked will initiate the registration process. Similarly, Principal respondents may be invited to register for access to the Information Provision platform by either the organisation's Participant Administrator, ie, the Administrator of the Participant Register, or the Authority.
Getting help	Help with using Information Provision is available if you need it. Click info.provision@ea.govt.nz to start an email message, or copy the address into the **To** field of a new email message.

Using Information Provision

Accessing the website

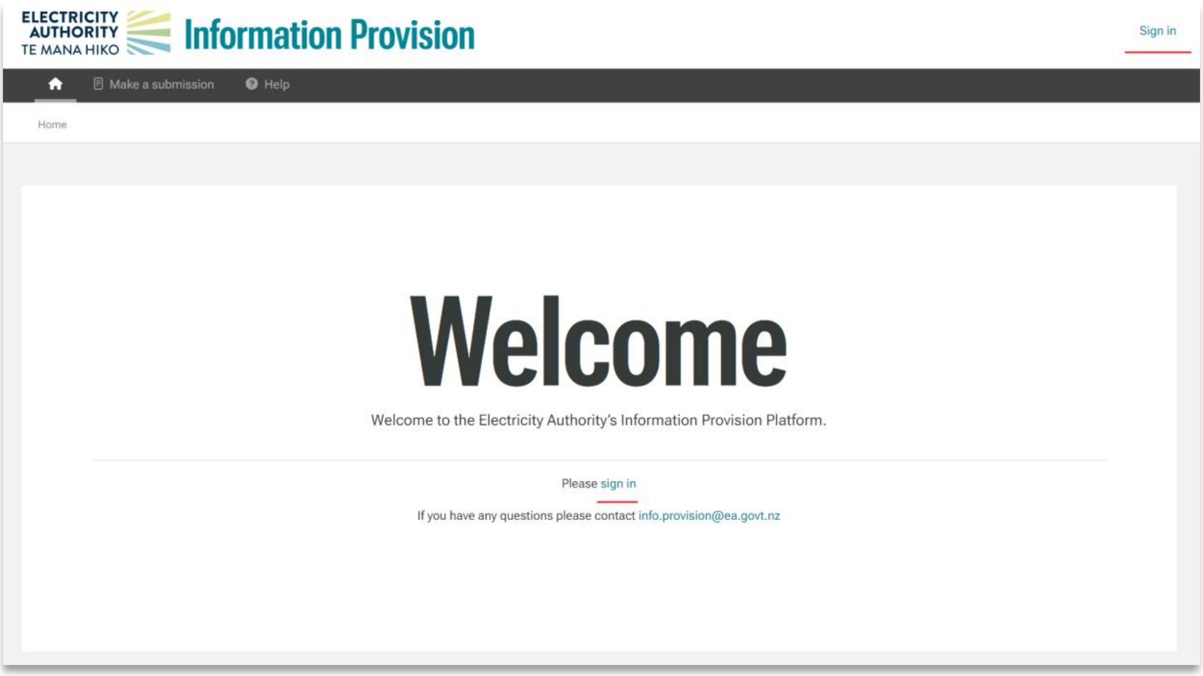
To access the Information Provision platform, either:

Type or copy this link **https://info.ea.govt.nz** into your browser address bar and press Enter

or:

Click the link above from this document page.

Either way, the Information Provision platform **Welcome** page displays:



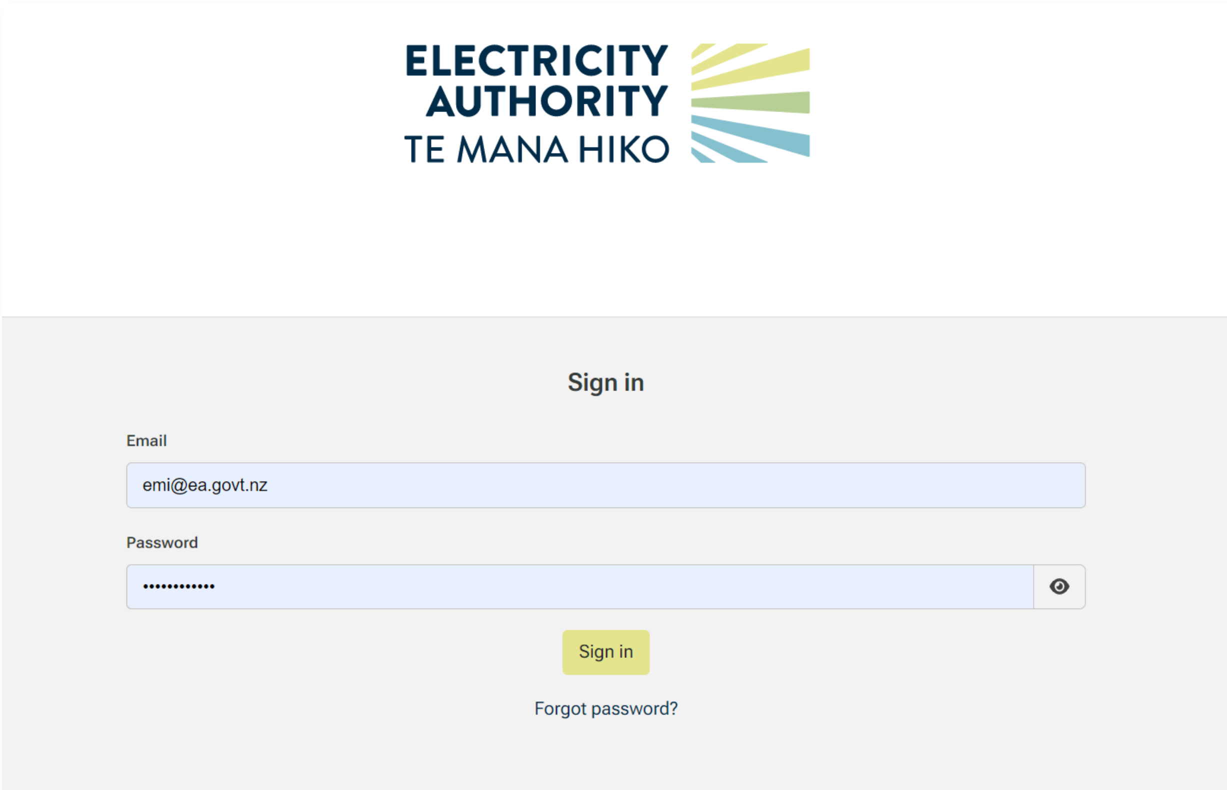
It is strongly recommended that you bookmark this page and/or save it to your Favourites for easy and quick future access.

Accessing the Sign in page

From the Welcome page, use one of the sign-in options circled in red in the previous graphic:

- Click **Sign in** at top right
- Click **Please sign in** near the centre of the page.

The **Sign in** page displays:



Signing in

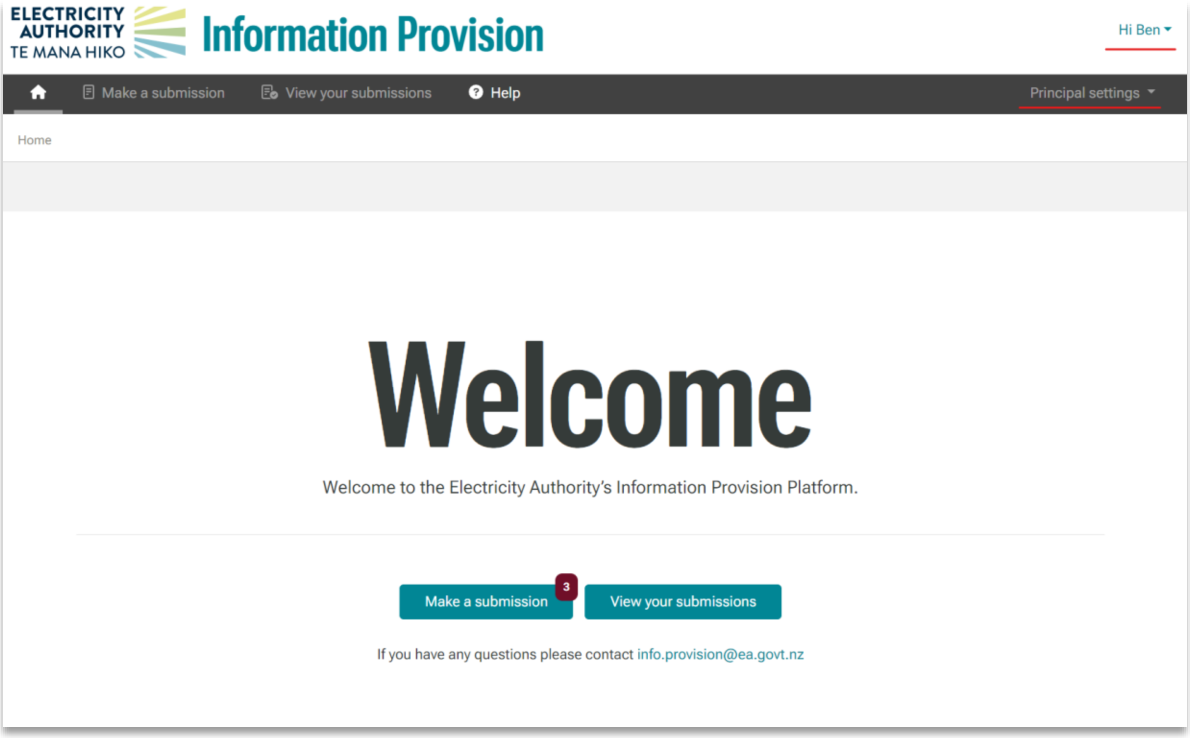
To sign into Information Provision:

1 Enter your email address

2 Enter your password

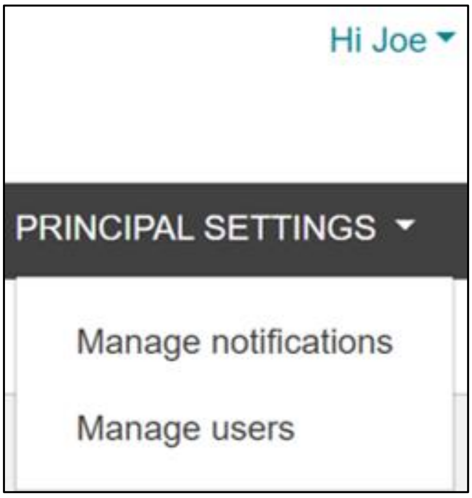
3 Click the **Sign in** button.

The Welcome page is updated with your profile and becomes your Home page:



Allocated role

Your allocated application role is indicated by the menu title (circled in the previous graphic) displayed at top right of the page:



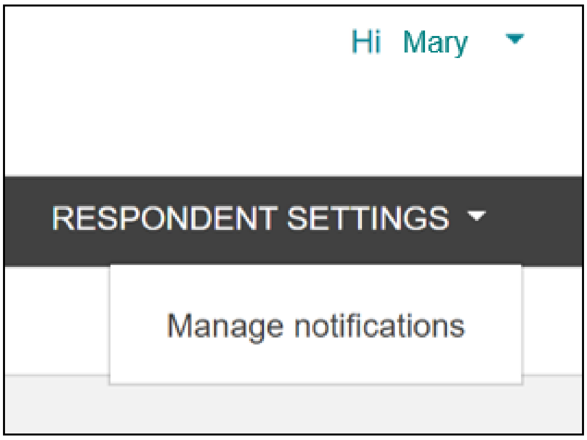
	In this case, the current user is logged in as a **Principal respondent**. This role can manage users from their organisation as well as notifications as indicated by the dropdown menu.

Allocated role (cont'd)

The other user role is that of **Respondent**.

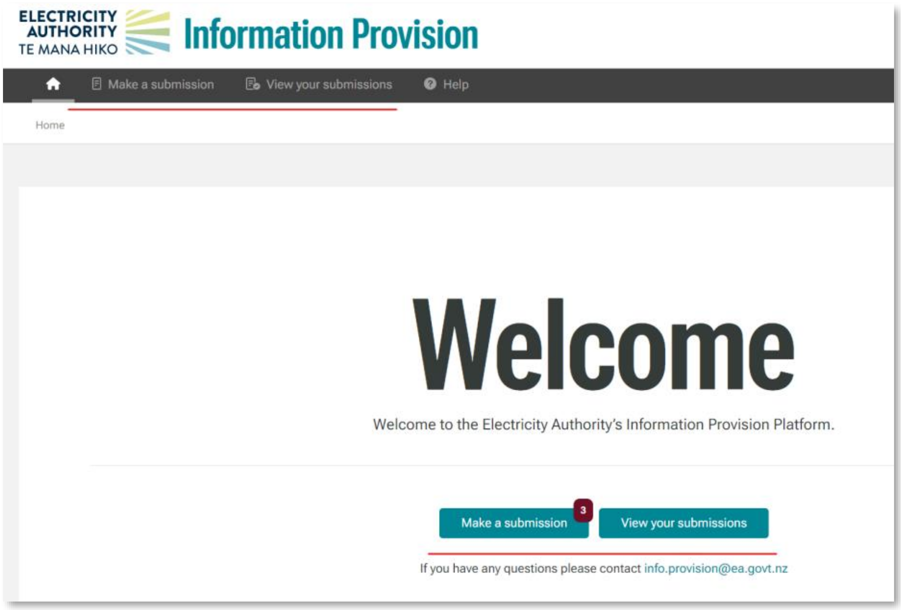
Although Respondents do not have the full set of permissions granted to the Principal respondent, they are able to make and view submissions.

Besides viewing and making submissions, permissions associated with the Respondent role are restricted to managing notifications:



Home page submission links and buttons

Links at top left and buttons near the centre of the page allow the user to access submission features:



Home button

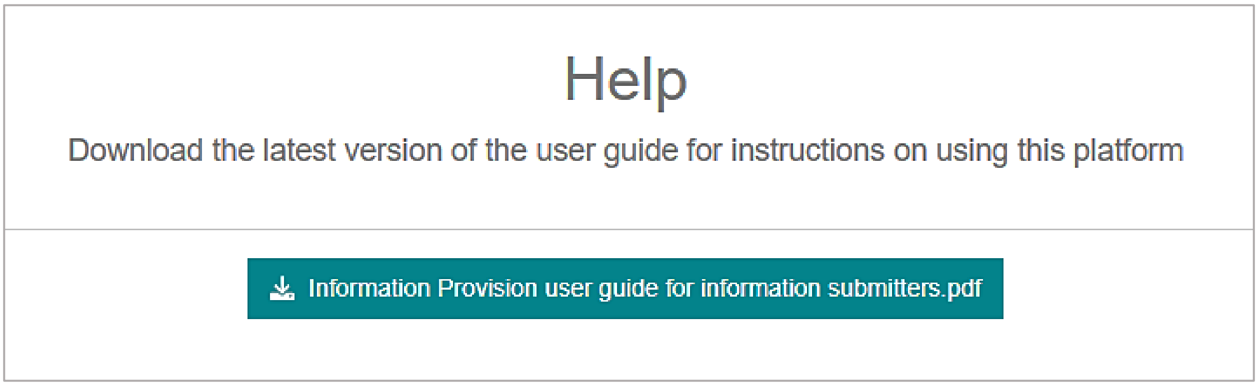
Note also that the **Home** button is to the left of the submission links at top left of the page.

Clicking the home button returns the user to the **Home** page.

Help button

A **Help** button displays to the right of the submission links in the page header bar:

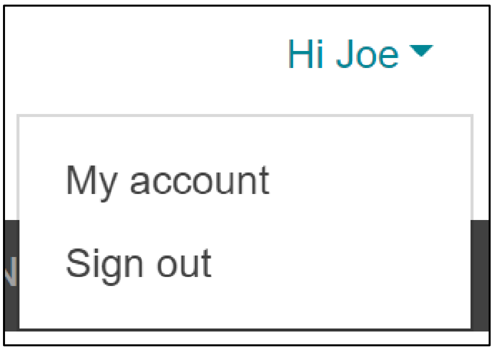
Clicking **Help** displays the following page:



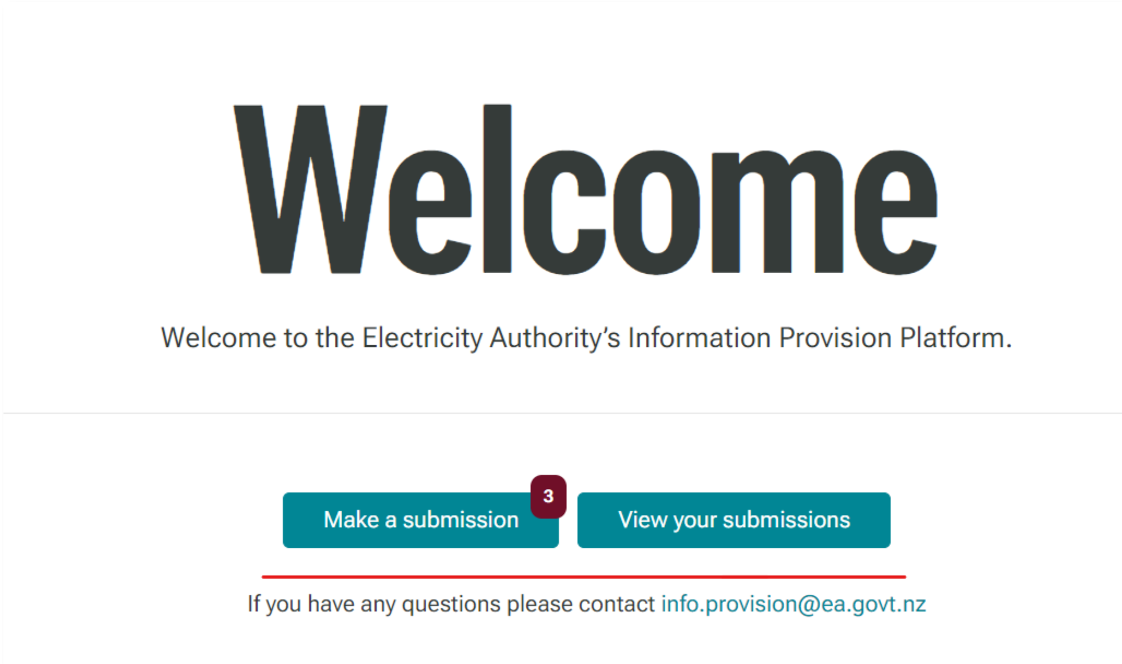
Click the button containing the user guide title to open the latest user guide.

Signing out

To sign out of Information Provision, click **Sign out** from the dropdown menu displayed when you click your username at top right:



Submissions	Submissions to requests for information are made by the Principal respondent and other Respondents on behalf of their organisation.
Submission reminders	Reminders to make submissions are indicated on your **Welcome page** by a superscript number displayed on the **Make a submission** button as indicated in the following example:



Making a submission

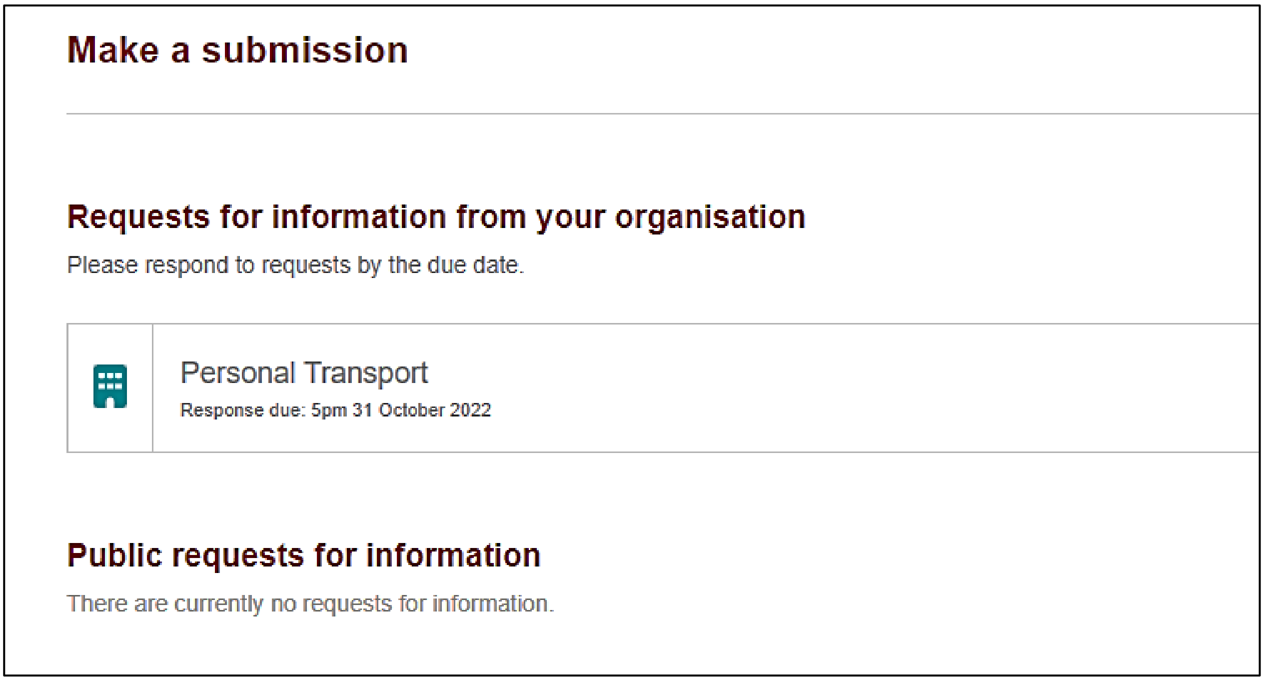
Either:

click the **Make a submission** button near the centre of the page

or:

click the **Make a submission** link in the Information Provision header row at top left.

The **Make a submission** page displays:



Requests for information are listed in ascending order of due date with those requiring a response soonest at the top of the list.

You may also find that some requests have banners attached to them indicating the current status of a response such as ‘overdue’ or ‘due soon’.

Types of responses

As displayed in the previous graphic, there are two types of information requests requiring different types of responses:

- requests from an **organisation**
- **public** requests.

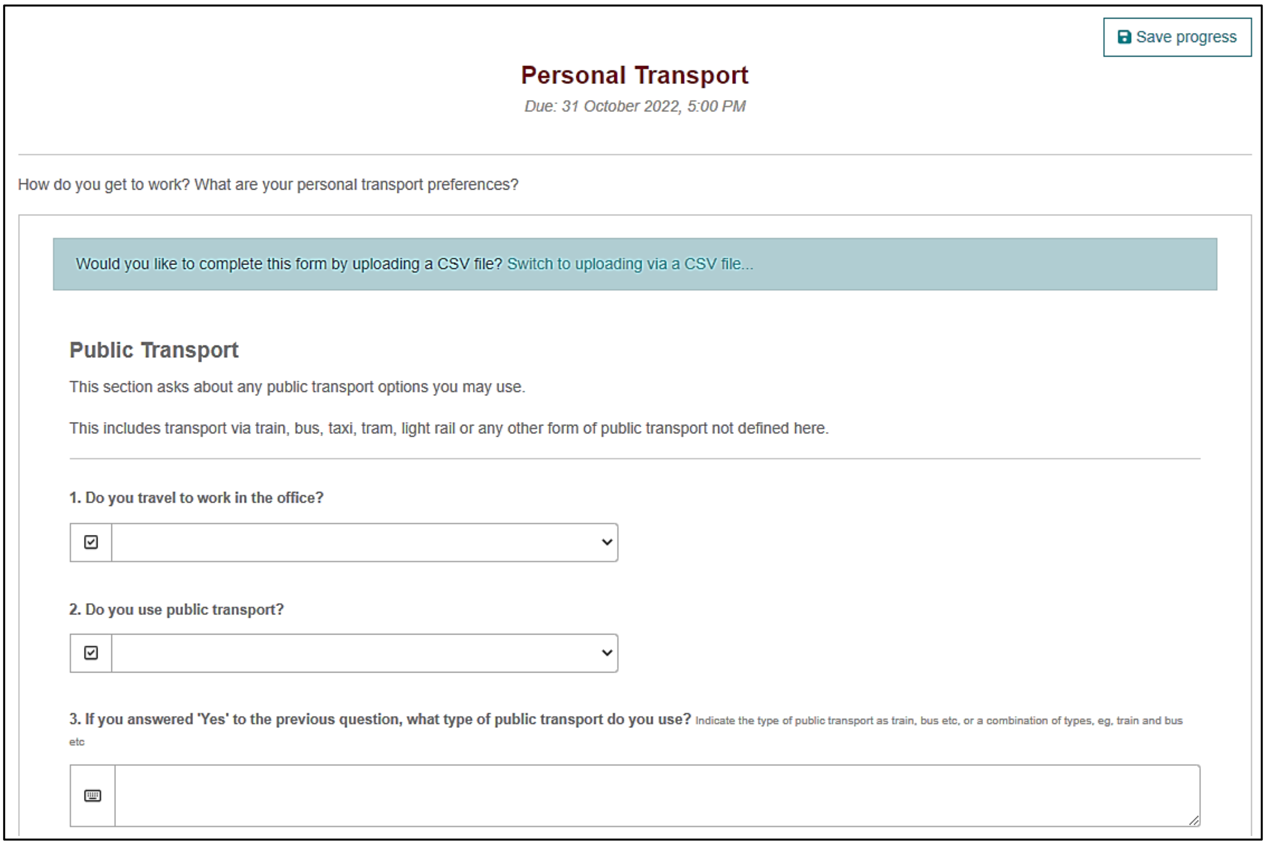
Requests for information from an organisation are answered by the Respondents and Principal respondents on behalf of their organisation.

In a public request for information, the people responding are doing so on behalf of themselves, ie, they are not representing a particular organisation's response.

Display a request for information

To display a request for information, click the **Respond** button at the right end of the row for the listed request:

The request opens to display the questions and due date beneath the request's title:



Answering the request

Answer the request using the answer fields displayed below each question.

Questions may require you to supply written answers, numerical values, or select from a dropdown.

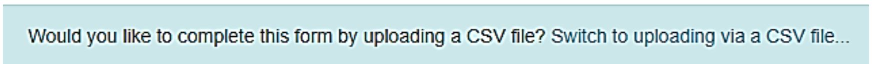
Answer all questions as completely as you can.

Note: Some fields will be mandatory and must be completed to enable successful submission of your answers.

Submission by CSV

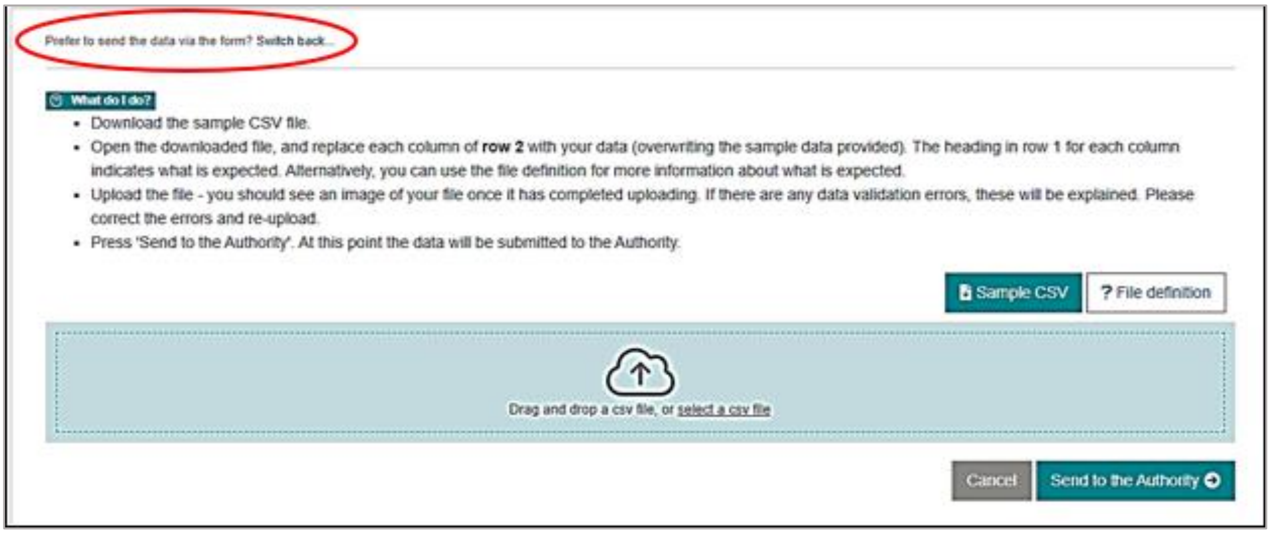
Some requests allow submission via a CSV file.

This is indicated by the following question displaying near the top of the response form:



To complete the form using a CSV file:

Click **Switch to uploading via a CSV file…** The following screen displays:



Returning to the response form

To return to the response form to enter data using the form fields, click:

Prefer to send the data via the form? Switch back...

Near top left of the screen (circled in the graphic above).

CSV format

If you wish to submit your response data via CSV file, it is important to ensure that the CSV file contains the information as requested and in the precise format prescribed.

When questionnaires are created, each field (question) is created with a **data type** which dictates the type of data the field will hold, eg, numbers or text.

It is important that the data type and question **order** is reflected in your CSV file or it will not upload. The presence of additional columns containing information not requested will also result in failure of the file to upload.

Creating the CSV file

There are two ways to create a CSV file:

- use a pre-prepared file created in an application such as Microsoft Excel and saved as a CSV file
- use the **Sample CSV** button on the screen to guide you through the process using Microsoft Excel.

Using a pre-prepared CSV file

If you wish to pre-prepare a CSV file yourself, you can get help with the correct data types and field order by clicking:

? File definition

near centre right of the screen. The following screen displays:

Personal Transport

How do you get to work? What are your personal transport preferences?

Section	Column	Technical notes	Form field description
Public Transport			
	Do you travel to work in the office?	Yes/No	
	Do you use public transport?	Yes/No	
	If you answered 'Yes' to the previous question, what type of public transport do you use?	Text area	
	Are any of your public transport options fully or partially electric?	Yes/No	
Self-driving			
	Do you drive to work?	Yes/No	
	If you drive to work, what type of vehicle do you use?	Text	
	Is your vehicle partially or fully electric?	Text	
Cycling			
	Do you cycle to work?	Yes/No	
	What type of cycle do you use?	Text	
	Is your cycle electrically assisted?	Yes/No	

This screen displays the information you need to construct a CSV file yourself. The column headings and the data they hold are as follows:

- **Section:** contains the questionnaire **section name**
- **Column:** contains the **field names** (questions)
- **Technical notes:** contains the field **data type**
- **Form field description:** contains any notes to assist with entering the correct data into the field.

An enlarged graphic of the central area displays below:

Column	Technical notes
Do you travel to work in the office?	Yes/No
Do you use public transport?	Yes/No
If you answered 'Yes' to the previous question, what type of public transport do you use?	Text area
Are any of your public transport options fully or partially electric?	Yes/No
Do you drive to work?	Yes/No
If you drive to work, what type of vehicle do you use?	Text
Is your vehicle partially or fully electric?	Text

Data types

If you are creating you own CSV file, you need to be aware of the different field data types and the data each type will accept.

You may meet the following data types in field definitions:

- **Text box** (single line of text)
- **Text area** (multiple lines of text)
- **Yes/No** (only 2 values allowed)
- **Integer** (whole numbers)
- **Double** (decimals)
- **Date** (dates)
- **File** (file or image)
- **ICP** (Installation Control Point number).

Ensure you are using the correct data type for each of the fields (columns) in your pre-prepared CSV file.

Using the sample CSV button

This is the easiest way to create an uploadable CSV file.

Note: Instructions for this method are also displayed on the upload page.

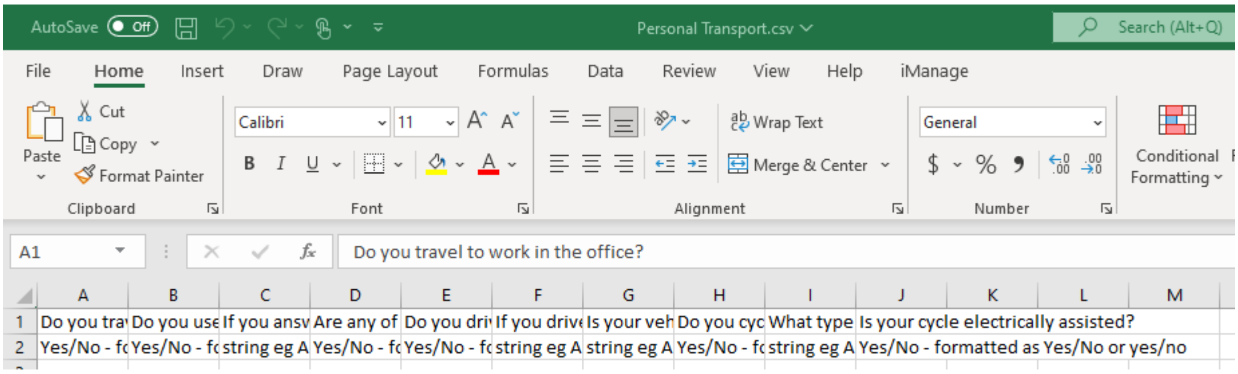
This means you do not have to pre-prepare a CSV file for upload.

Click the Sample CSV button.

Your web browser indicates a file is ready to download.

Locate the correct download – it will be the one with the same name as the response form and open the file.

Microsoft Excel opens and displays the CSV file ready for you to enter data as in the following example:



An expanded view of part of this file is shown in the next section.

Using the sample CSV file

The following graphic is an expanded section of the preceding example CSV file:

	A	B	
1	Do you travel to work in the office?	Do you use public transport?	If you answered 'Yes'
2	Yes/No - formatted as Yes/No or yes/no	Yes/No - formatted as Yes/No or yes/no	string eg ABC

- **Row 1** contains the questionnaire **field names** (questions)
- **Row 2** contains the field **data type**.

To use the sample CSV file, **replace the data in Row 2 with your data** as in the following example:

	A	B	
1	Do you travel to work in the office?	Do you use public transport?	If you answered 'Yes'
2	Yes	Yes	Train

Ensure you have filled in all the fields with the correct data.

Once complete, **save the file as a CSV** with a meaningful filename.

Remember where the file is saved.

Upload the CSV file

To upload the CSV file:

1. Click the link **select a csv file** near the centre of the screen:

   File Explorer opens so you can locate your CSV file.

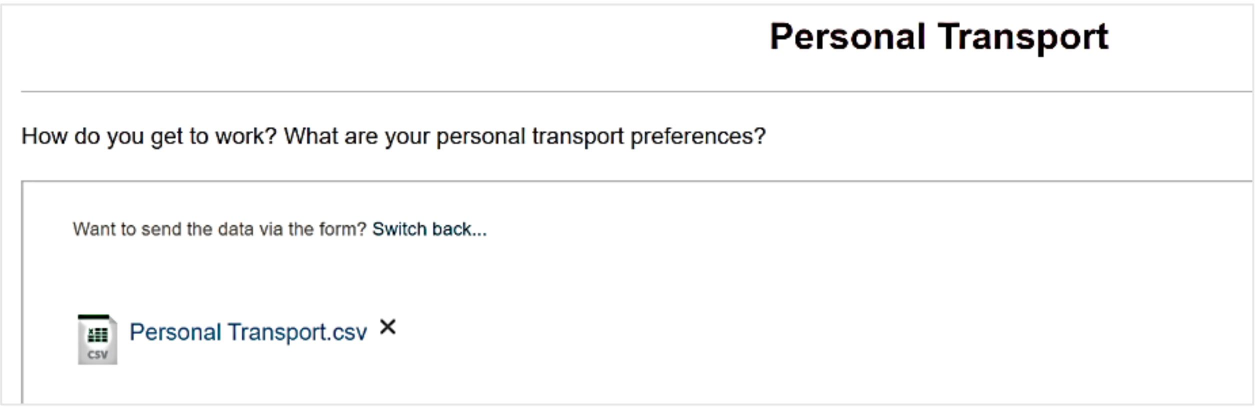
2. Browse to your CSV file, select it and click the **Open** button at bottom right of the File Explorer window.

   The CSV file is uploaded and the screen changes to indicate whether or not the upload was successful.

   This is discussed in the next section.

Determining upload success

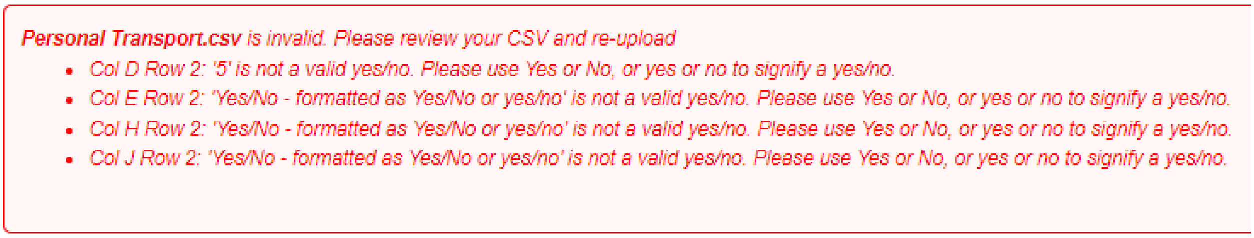
Successful upload: The upload screen changes to display the newly uploaded filename near centre left:



Note: If you wish to remove the uploaded file for any reason, simply click the **X** to the right of the filename.

The file is removed and the upload screen returns to its original state ready for you to select a file or return to the response form.

Unsuccessful upload: The upload screen displays an error message detailing the errors that are preventing the file from uploading successfully:


Personal Transport.csv is invalid. Please review your CSV and re-upload

- Col D Row 2: '5' is not a valid yes/no. Please use Yes or No, or yes or no to signify a yes/no.
- Col E Row 2: 'Yes/No - formatted as Yes/No or yes/no' is not a valid yes/no. Please use Yes or No, or yes or no to signify a yes/no.
- Col H Row 2: 'Yes/No - formatted as Yes/No or yes/no' is not a valid yes/no. Please use Yes or No, or yes or no to signify a yes/no.
- Col J Row 2: 'Yes/No - formatted as Yes/No or yes/no' is not a valid yes/no. Please use Yes or No, or yes or no to signify a yes/no.

Each error is explained in detail and with the remedy required.

Correct the errors, save the file and re-upload it.

Saving progress

You may have the option to save your progress. This will be indicated by the **Save progress** button displaying at top right.

If this feature has been enabled for the questionnaire and you do not have all the required information to answer the questions, you can use it to save your progress and return to the request later.

To do this, click the **Save progress** button at top right of the form.

Your response to the request is saved in draft format with the date and time this occurred displaying briefly below the **Save progress** button.

Multiple respondents

A submission can be started by one Respondent and continued by another Respondent from the same organisation.

Note: The following scenario is only possible when the **Save progress** button has been enabled by the questionnaire creator.

For example, a Respondent may gather the required submission data, fill out the submission and save it.

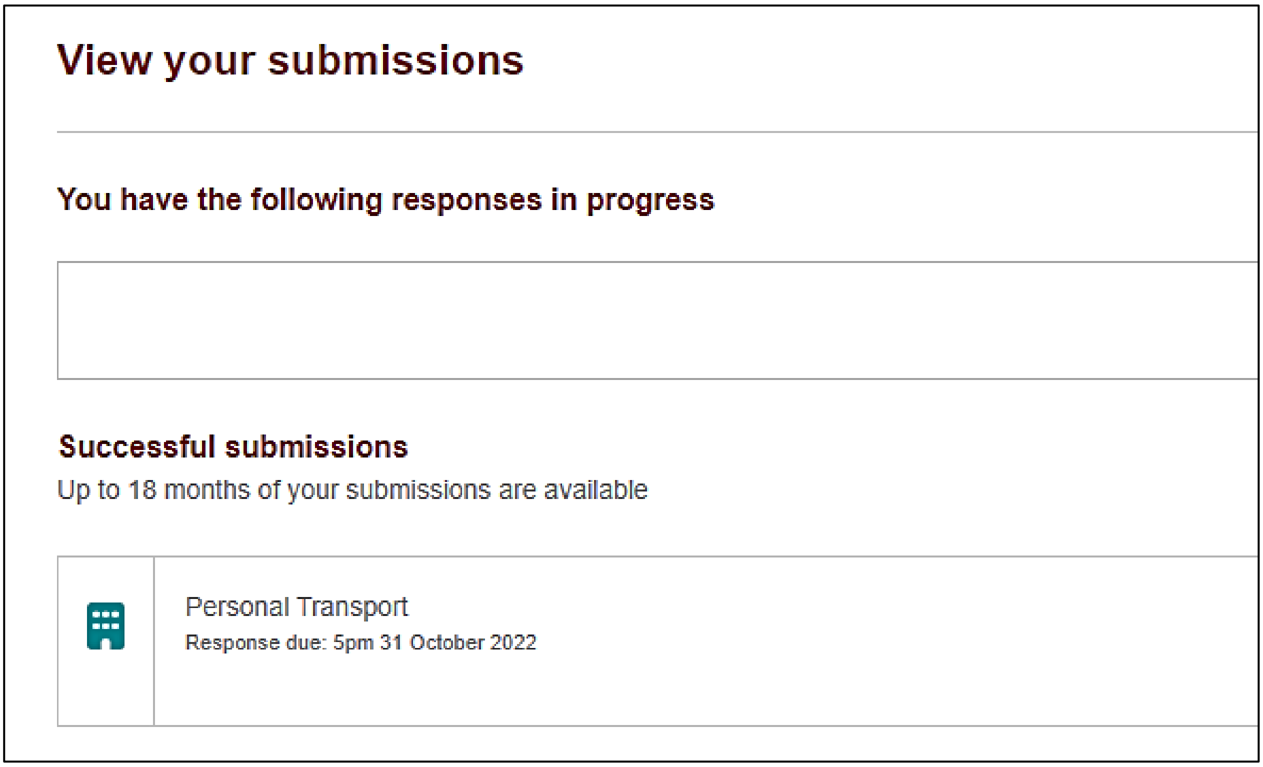
Another person from the same organisation's respondent team (eg, the Principal respondent) may then log in to the platform at a later date or time, review the saved submission, make any required updates and send it to the Authority.

This is especially relevant if the submission contains any questions requiring confirmation that what is being submitted is 'true and correct'.

Submit your response

To submit your response, click the **Send to the Authority** button at bottom right of the form.

	Your response is sent to the Authority and you – and any other Respondent who has been added to the email confirmation list - will receive an email confirming that your response has been sent to the Authority. Click **Cancel** if you do not wish to respond yet. You are returned to the **Requests for information from your organisation** list.
Editable submissions	Some submissions may be editable allowing Respondents to edit their data **after** it has been submitted. This option is set by the questionnaire creator. The options include allowing the Respondent to edit submissions: • **any time** after submission • **within 20 minutes** of submission. • at **no time**. If either of the first 2 options is enabled, you will be able to access your submission through your **View your submissions** page.
Viewing your submissions	Click the **View your submissions** button near the centre of the page, or the **View your submissions** link near top left of the Information Provision header bar. The **View your submissions** page displays:



Submissions for both sections (ie, in progress and successful) are listed in descending order of date submitted.

Resuming, deleting and viewing submissions	**In progress** submissions can be resumed or deleted using the **Resume** and **Delete** buttons at the right end of the submission row. **Successful** submissions can be opened by using the **View** button at the right end of the submission row.

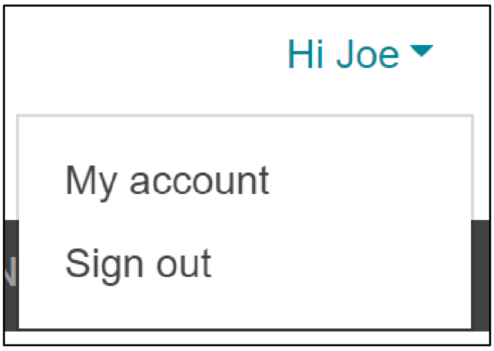
APPENDICES

Appendix A: Personal menu options

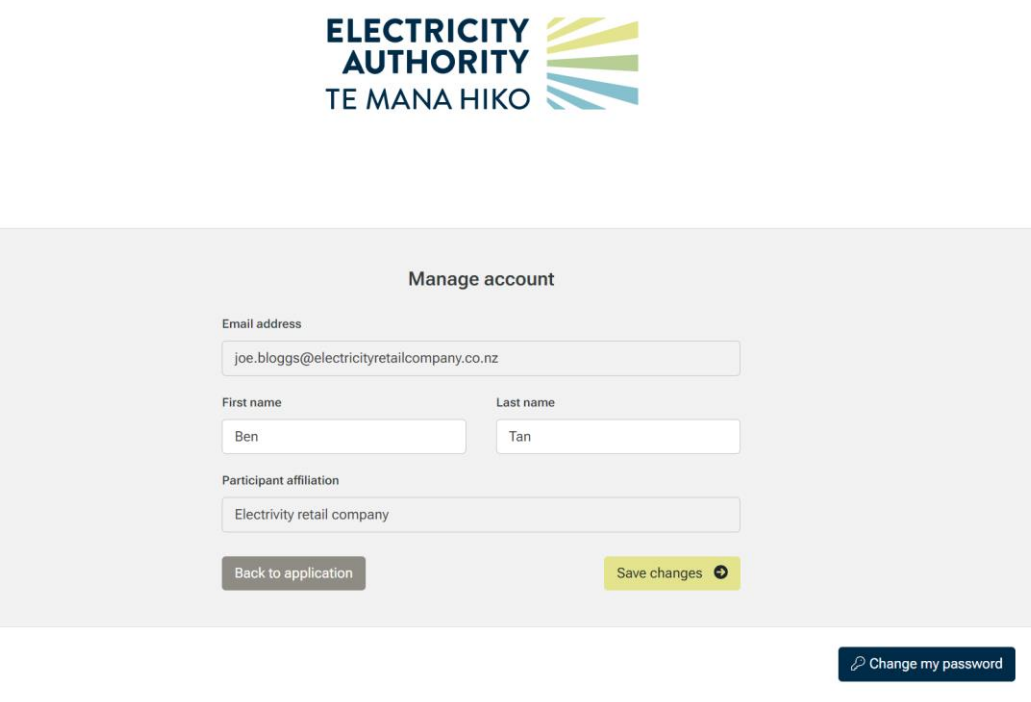
This appendix provides full descriptions of the items available in the Information Provision platform user dropdown menu.

These menu options are the same for both Principal respondents and Respondents.

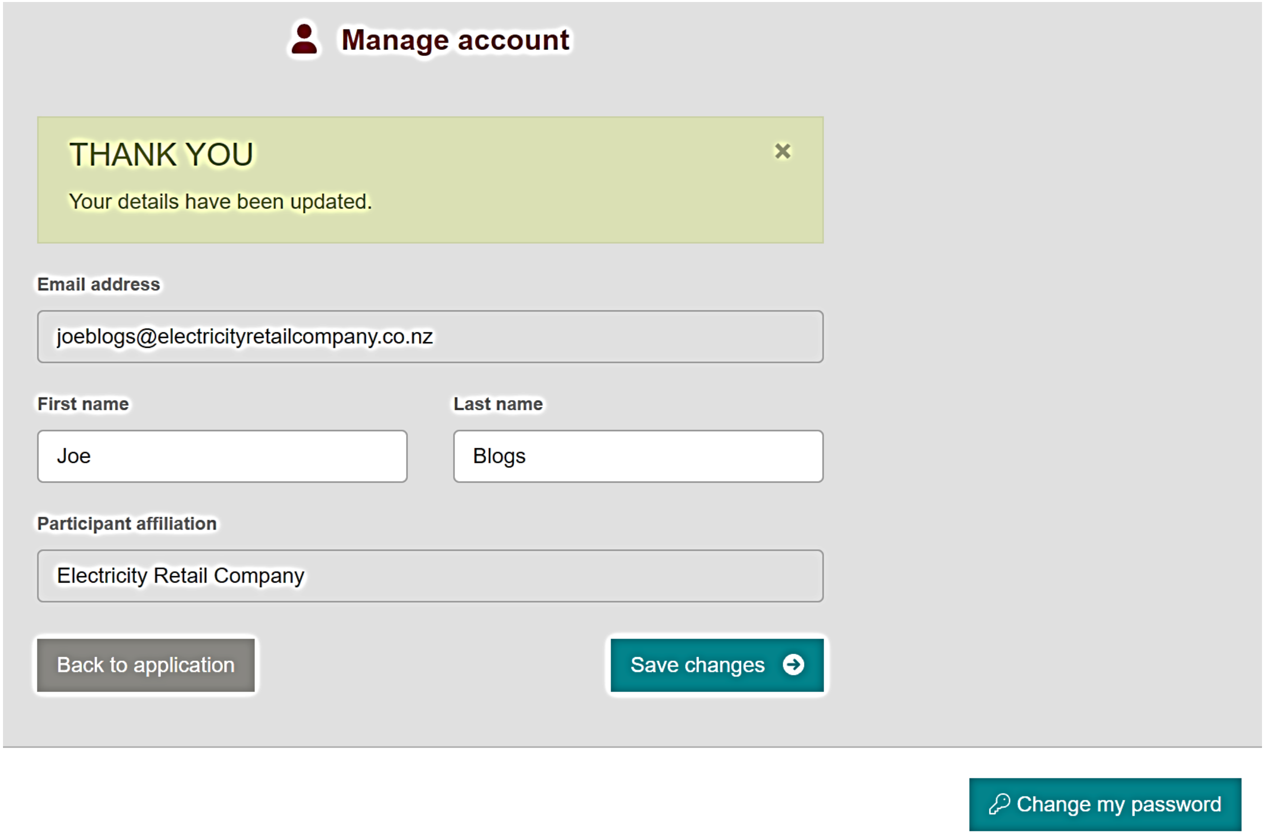
This menu displays when a user clicks their name at top right as in the following example:



My account Select this menu item to display the following page:



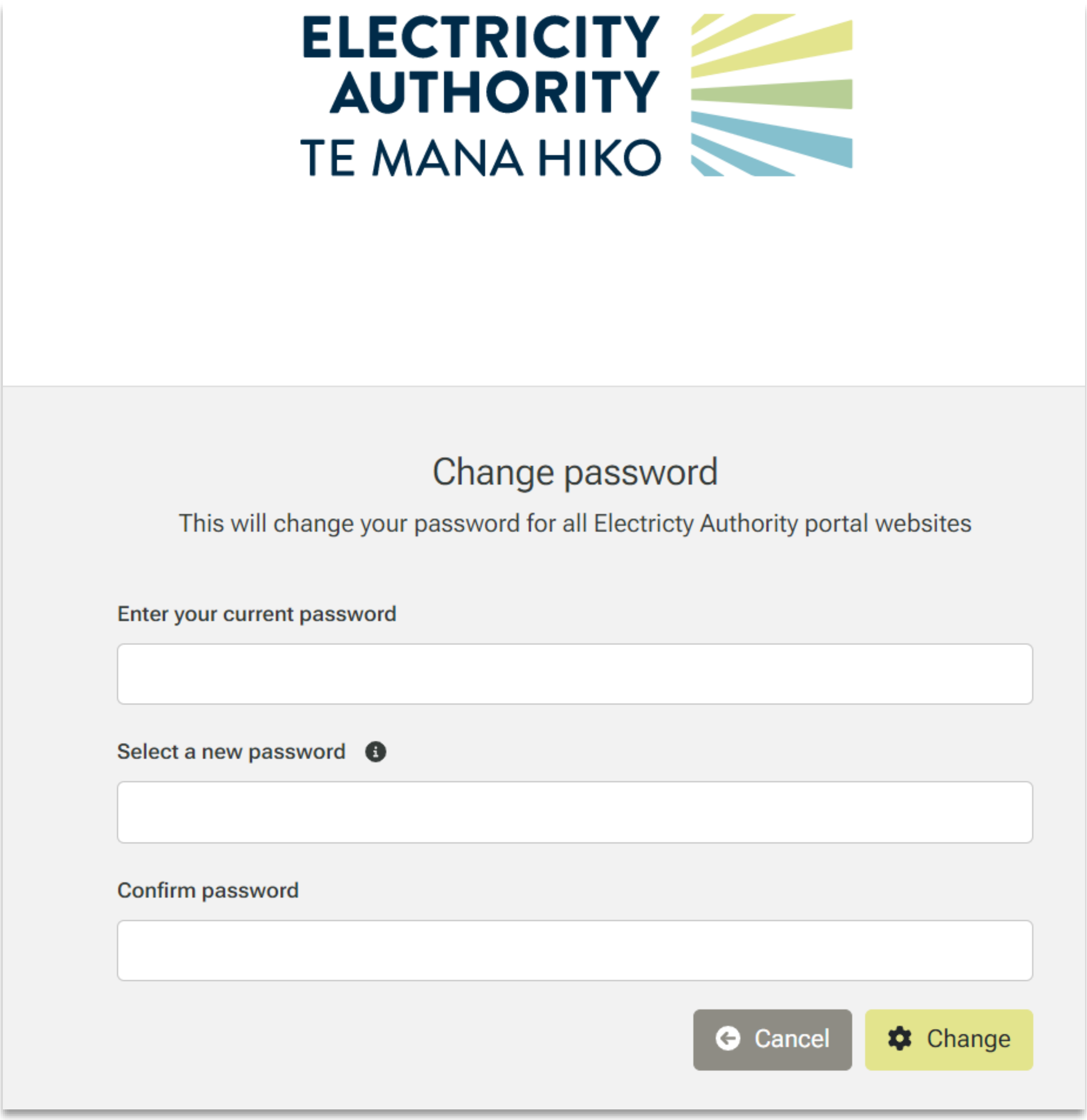
Save changes	If you update your details, click the **Save changes** button. Your changes are saved and a message displays thanking you the update:



Back to application	Click this button to return to your application **Home** page.

Change password

Click the **Change my password** button at bottom right to display the following page:



Follow the instructions displayed above each field to change your password.

Once you have filled in the fields, click the **Change** button to change your password.

Click the **Cancel** button to keep your original password and return to the previous page you were working on.

Password rules

Passwords must:

- be at least **17 characters** long
- contain a **digit** (number)

	• contain a **lowercase letter** • contain an **uppercase letter** • contain a **special character**.
Sign out	Click this menu item to sign yourself out of the platform. After signing out you should close the browser tab.

Appendix B: Allocated user role menu options

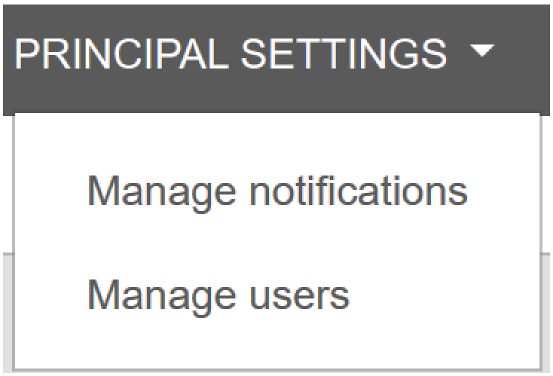
There are two users roles: **Principal respondent** and **Respondent**.

This appendix provides full descriptions of the menu options/permissions available for a **Principal respondent**.

Respondent permissions and options are limited to setting notifications for themselves. The only section in this appendix that is usable by Respondents is **Setting notifications**. This is referred to in the following **Respondent Settings menu** section.

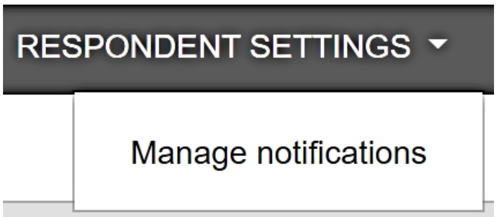
Principal Settings menu

This dropdown menu displays when a user with the **Principal respondent** role clicks the **Principal settings** link displayed in the platform header bar at top right:



Respondent Settings menu

This dropdown menu displays when a user with the **Respondent** role clicks the **Respondent settings** link displayed in the platform header bar at top right:



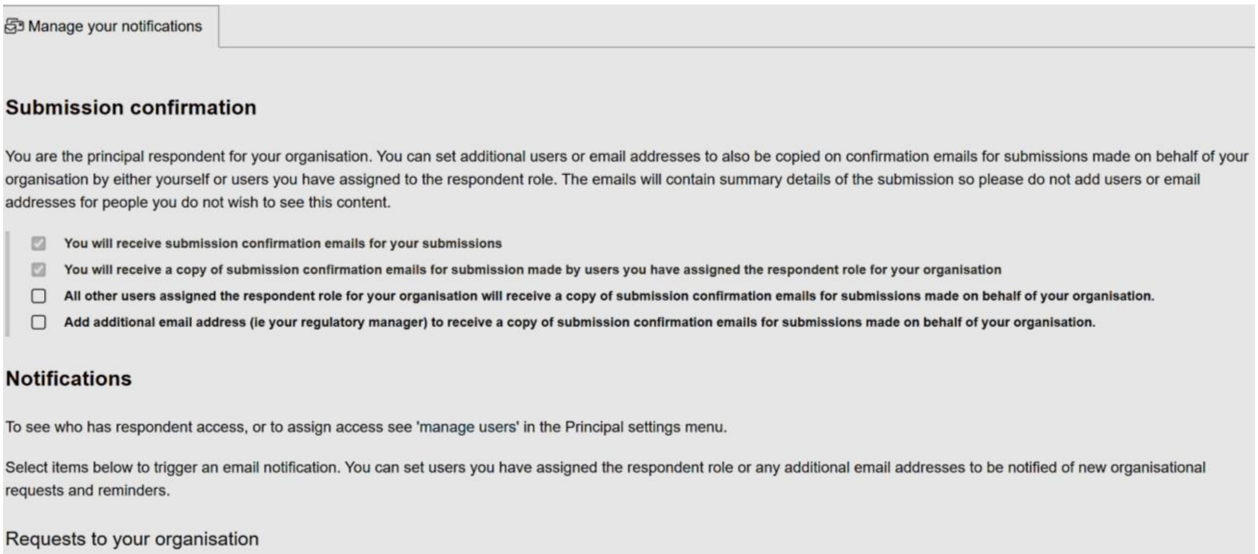
This is the **only** menu item available for a Respondent.

Apart from this one item, everything else in this appendix is for the Principal respondent only.

Click **Setting notifications** (or scroll down further in this appendix until you reach it) to view the notification options available to a Respondent.

Manage notifications

Select this menu item to display the following page:



The page is divided into two areas:

- **Submission confirmation**
- **Notifications**.

Submission confirmation

A Principal respondent can set additional users or email addresses for confirmation emails when you and your respondent team make submissions on behalf of your organisation.

Note:

Be careful when setting additional users or email addresses as the emails contain submission details.

You are strongly advised not to add users or email addresses of people you do not wish to see this information.

Submission confirmation options

There are four Submission confirmation options.

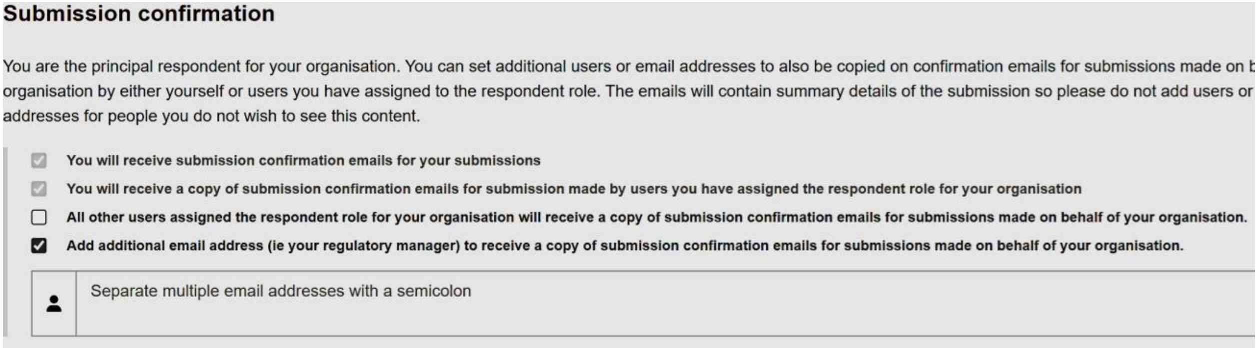
The **first two** options are pre-set. They indicate that you will receive a copy of any confirmation email for submissions by you or your respondent team.

The **second two** options are available for you to set if you wish.

- The first of these can be set to allow all Respondents in your organisation to receive a copy of any confirmation emails received for any submissions made.

- The second of these allows you to add additional email addresses to receive a copy of any confirmation emails received for any submissions made.

If you select the additional email addresses option, a field displays below the selected option:

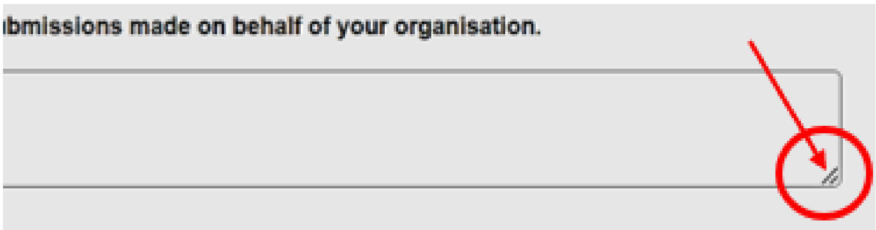


Type the additional email addresses in the field, separating each with a semicolon (;).

This is where you need to be careful and check your entries before clicking **Save**.

Alter field height

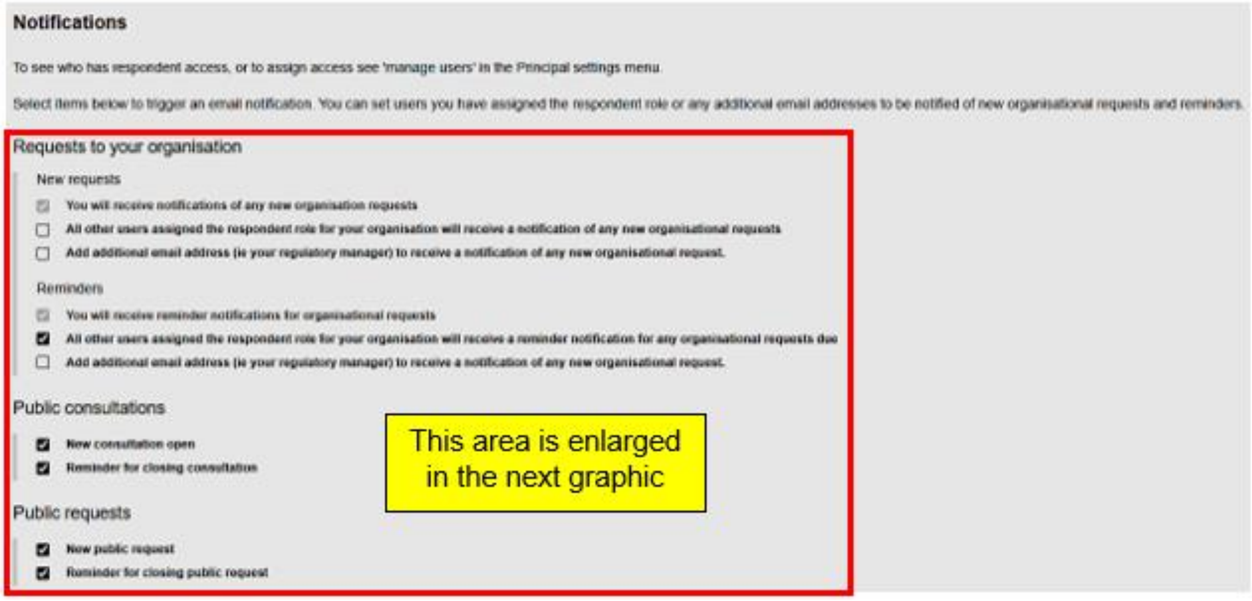
The field's height can be altered by dragging the sizing handle at the bottom right corner of the field up or down:

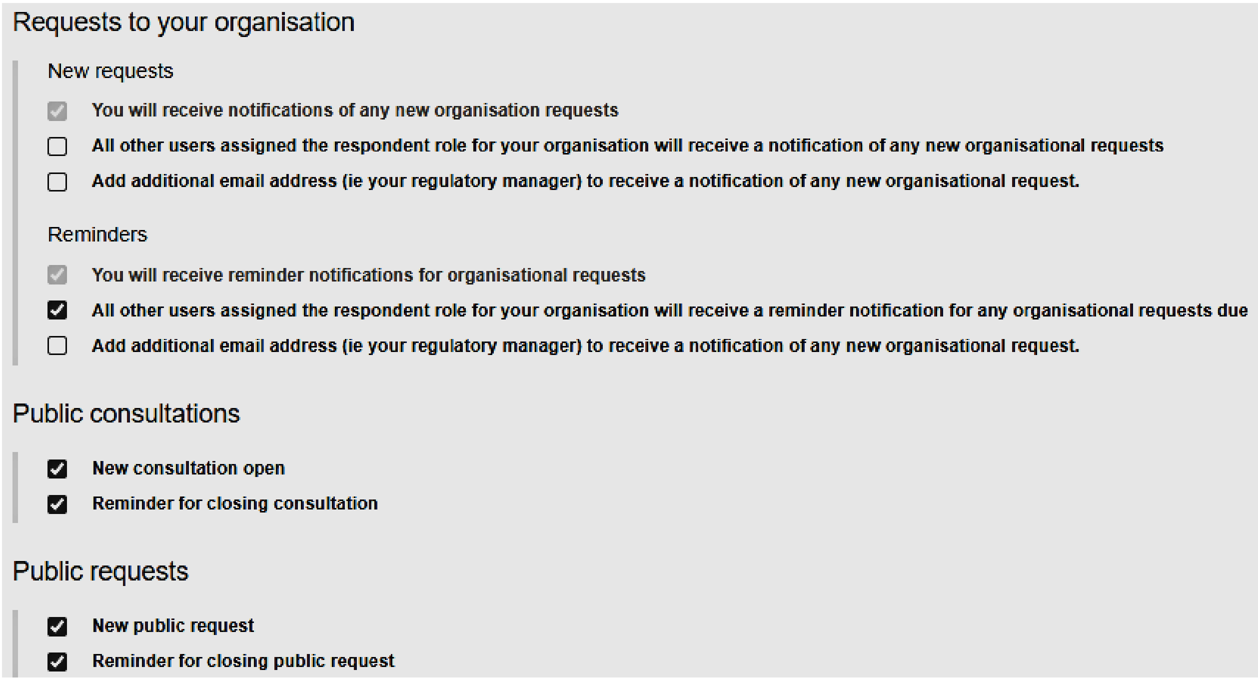


Notifications

This section deals with triggering email notifications.

This is where you set Respondents and any additional email addresses to be notified of new organisational requests and reminders:





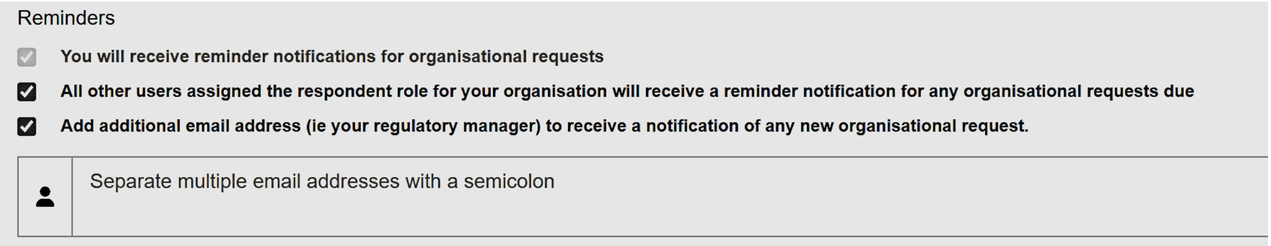
Setting notifications

Respondents can set some notifications for themselves, but not for anybody else. These are generally limited to the **Public consultations** and **Public requests** areas as in the above graphic.

Principal respondents are able to fully utilise the options displayed on this page. They can set notifications for other Respondents as well as for themselves. This may result in a Respondent receiving additional email notifications to those they set for themselves.

Additional email addresses

Selecting this items displays the following field:



This field works the same way as the field for adding extra email addresses to receive submission confirmation emails.

Add additional email addresses by typing them in the field with each separated by a semicolon (;).

Once again, check the addrtesses you add carefully to ensure you are including only the personnel you wish to include.

Alter the field height by dragging the sizing icon in the field's bottom right corner.

Saving your changes

To save your changes, click the **Save** button at bottom right.

The button briefly displays a tick when your changes have been saved.

Manage users

This second selection on the **Principal settings** menu displays the following page:

This where a Principal respondent manages the user list on behalf of their organisation.

The Principal respondent can **add, delete** and **edit** users.

Submission viewability

Be aware submissions made are viewable by all Respondents and Principal respondents.

For this reason, be wise and careful in your selection of the people to fill these roles for your organisation.

Role limits

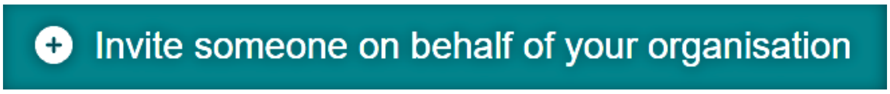
Roles are limited to:

- **two Principal respondents**
- **five Respondents**.

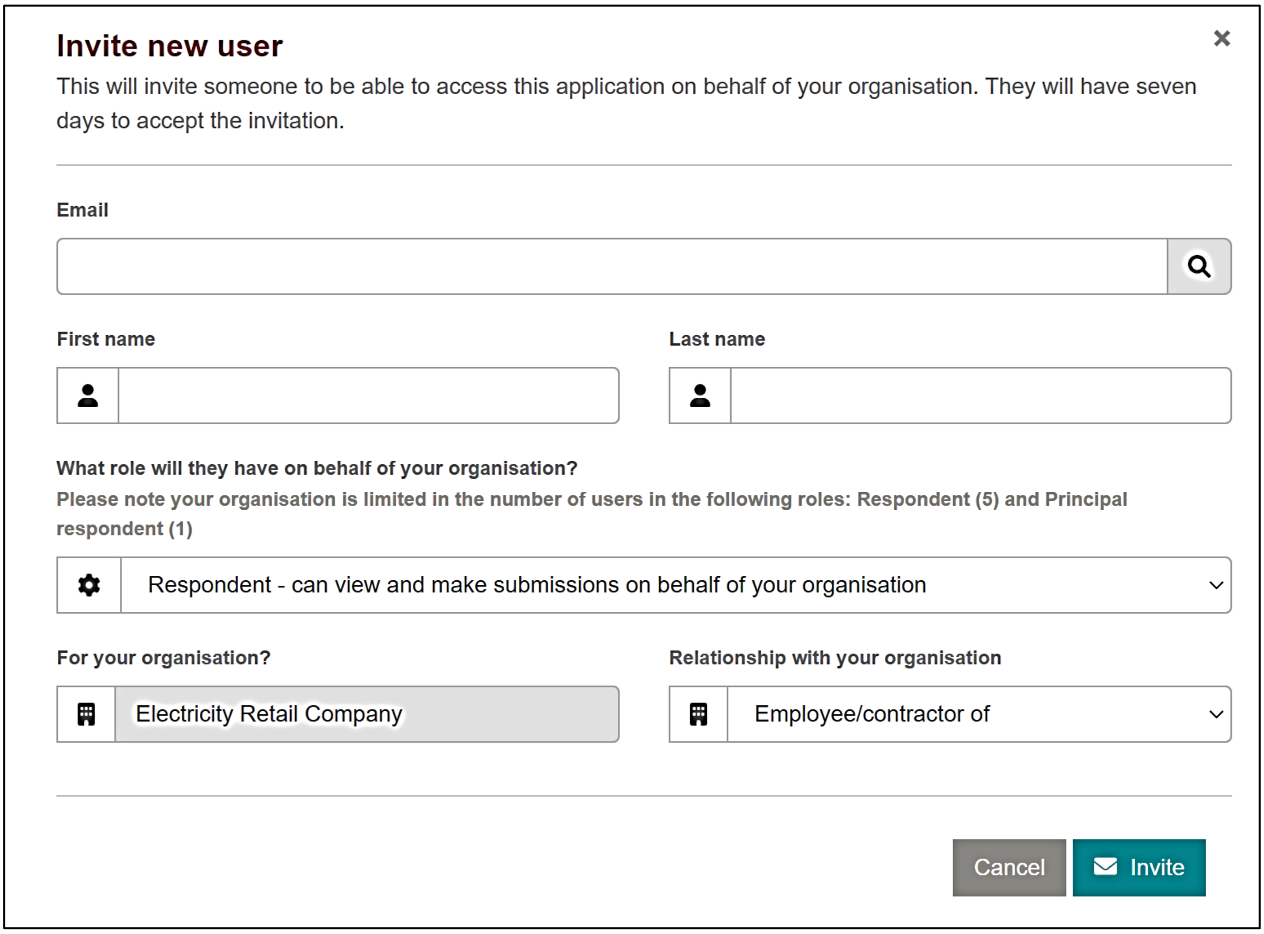
These role limits are currently in force due to the submission viewability discussed in the previous section.

Add a user

To add a user to the list, click



at top left of the form. The following popup form displays:



Filling in the form

Type the email address, first and last names of the new user in the fields as required. Double-check you have them correct.

Role

You now need to decide the role of the new user. There are two options which display from the dropdown list:

- **Respondent**: A user who can view and make submissions on behalf of your organisation
- **Principal respondent**: As above for a Respondent but with the added ability to manage the users.

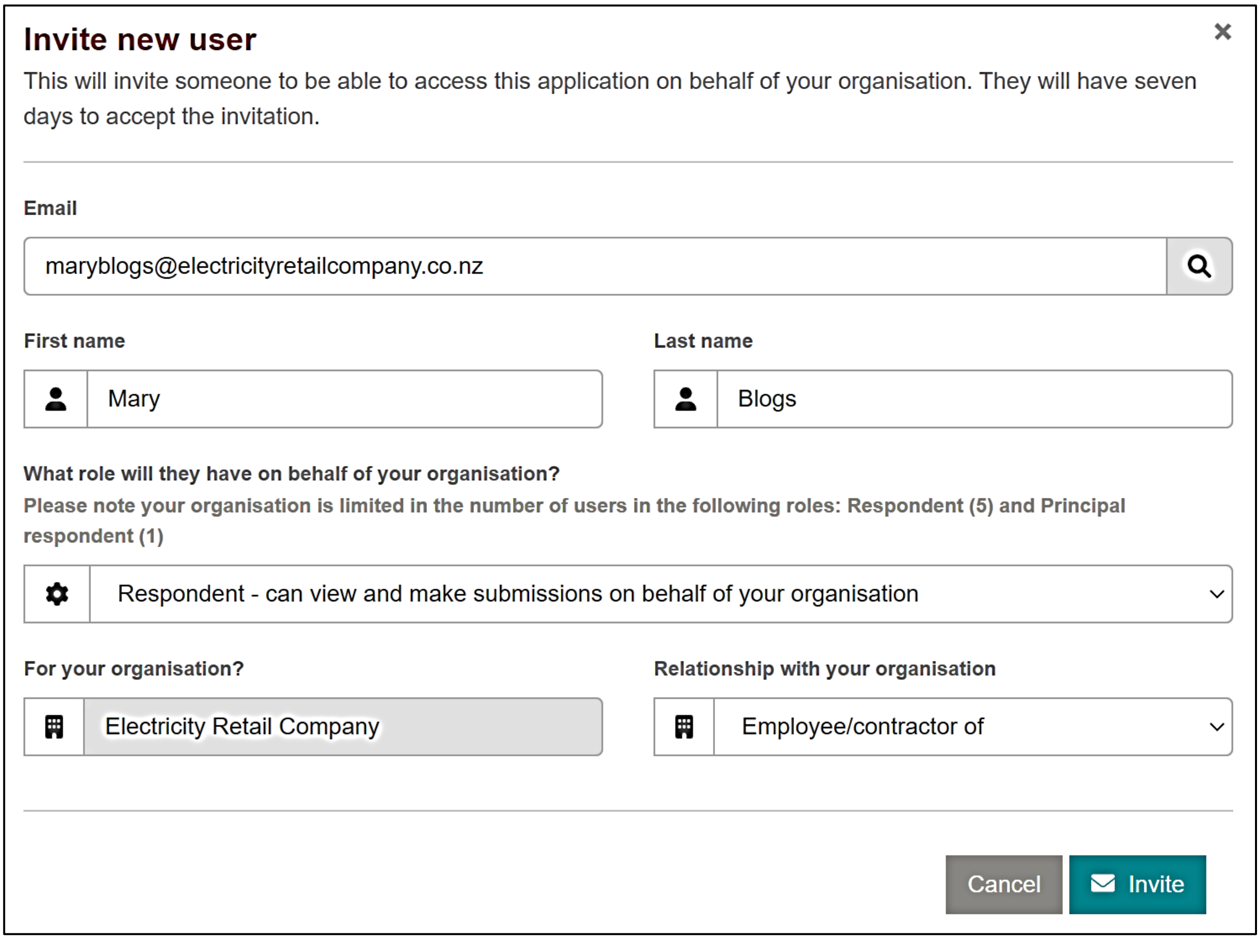
Organisation

This field at bottom left should be automatically populated with your organisation name.

Relationship with your organisation

Use the dropdown list for this field to choose whether the new user is an employee/contractor of the organisation, or an agent or auditor working on behalf of the organisation.

Your **Invite new user** form may look similar to this example:


Invite new user
This will invite someone to be able to access this application on behalf of your organisation. They will have seven days to accept the invitation.
Email
maryblogs@electricityretailcompany.co.nz
First name
Mary
Last name
Blogs
What role will they have on behalf of your organisation?
Please note your organisation is limited in the number of users in the following roles: Respondent (5) and Principal respondent (1)
Respondent - can view and make submissions on behalf of your organisation
For your organisation?
Electricity Retail Company
Relationship with your organisation
Employee/contractor of
Cancel
Invite

Invite the new user

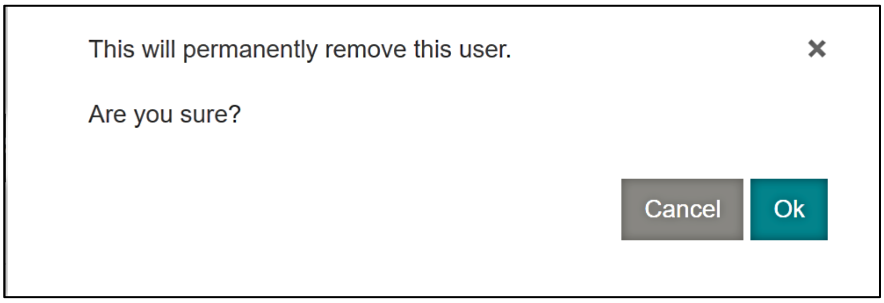
Click the **Invite** button to add the new user to the list:

The new user is added to the top of the list with their role indicated in the coloured box to the right of their organisation name:

First name	Last name	Email	Organisation
Mary	Blogs	maryblogs@electricityretailcompany.co.nz	Electricity Retail Company **Respondent**

Remove a user

To remove a user from the list, click the **Delete** button at the right end of the user's row. The following message displays:

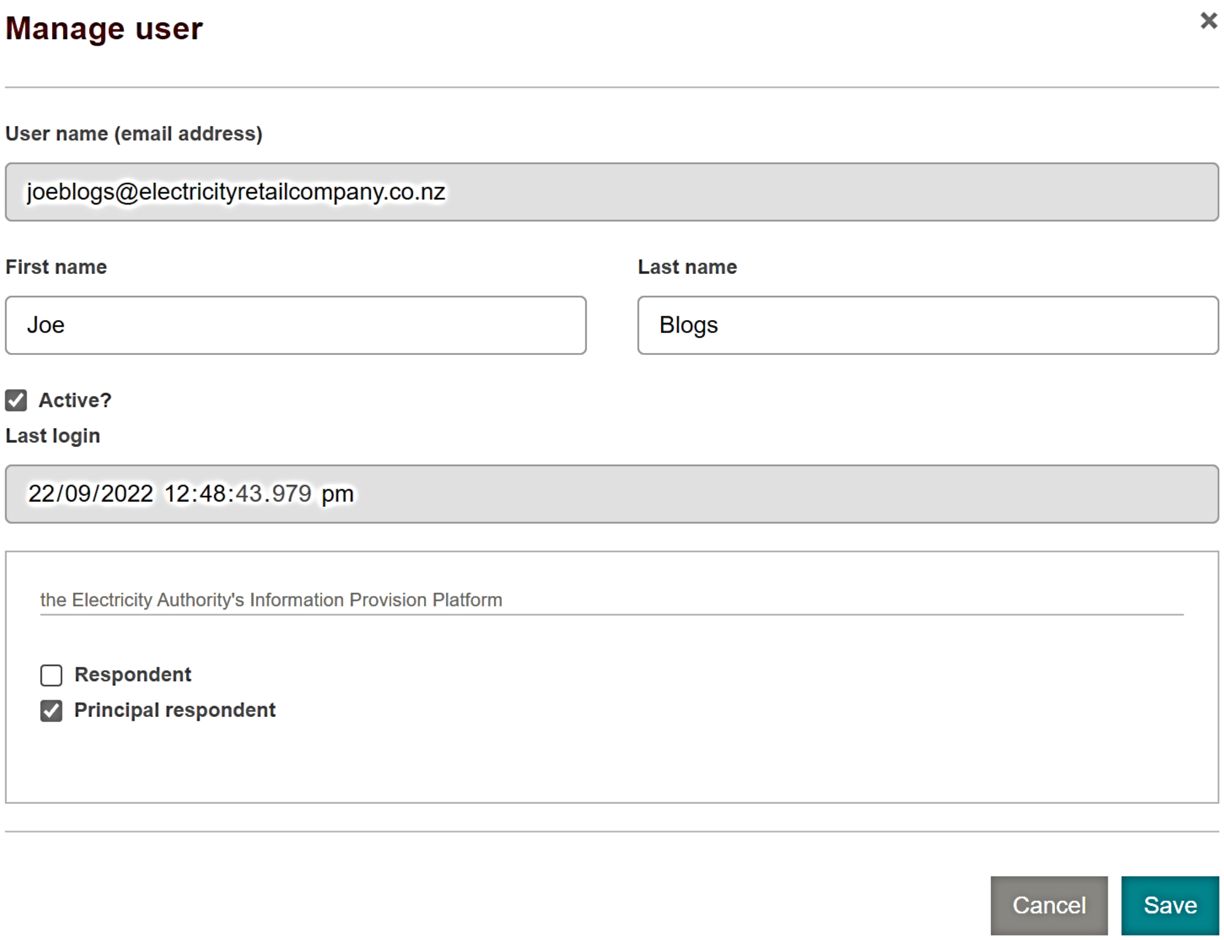


Click **OK** to delete the user and return to the users list.

Click **Cancel** to return to the users list without deleting the user.

Editing a user

To edit a user's details, click anywhere on the user's row – **except** the delete button - in the users list. A popup form displays:



Make changes to any editable details as necessary and click **Save** to save your changes.

Click **Cancel** to return to the users lists without saving any changes.