

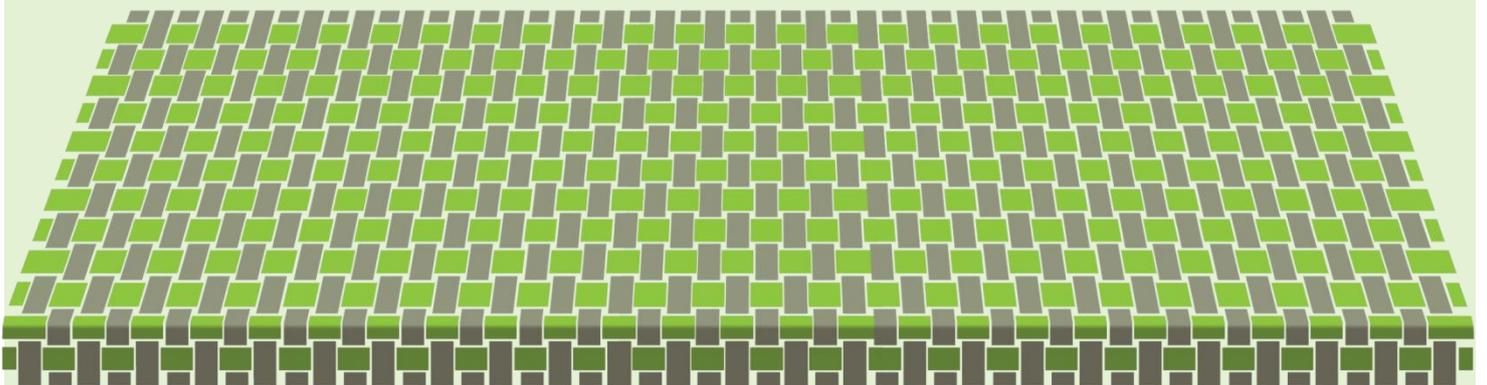


Tuakiri
NEW ZEALAND ACCESS FEDERATION INC.

Tuakiri Virtual Home

User Guide for Administrators

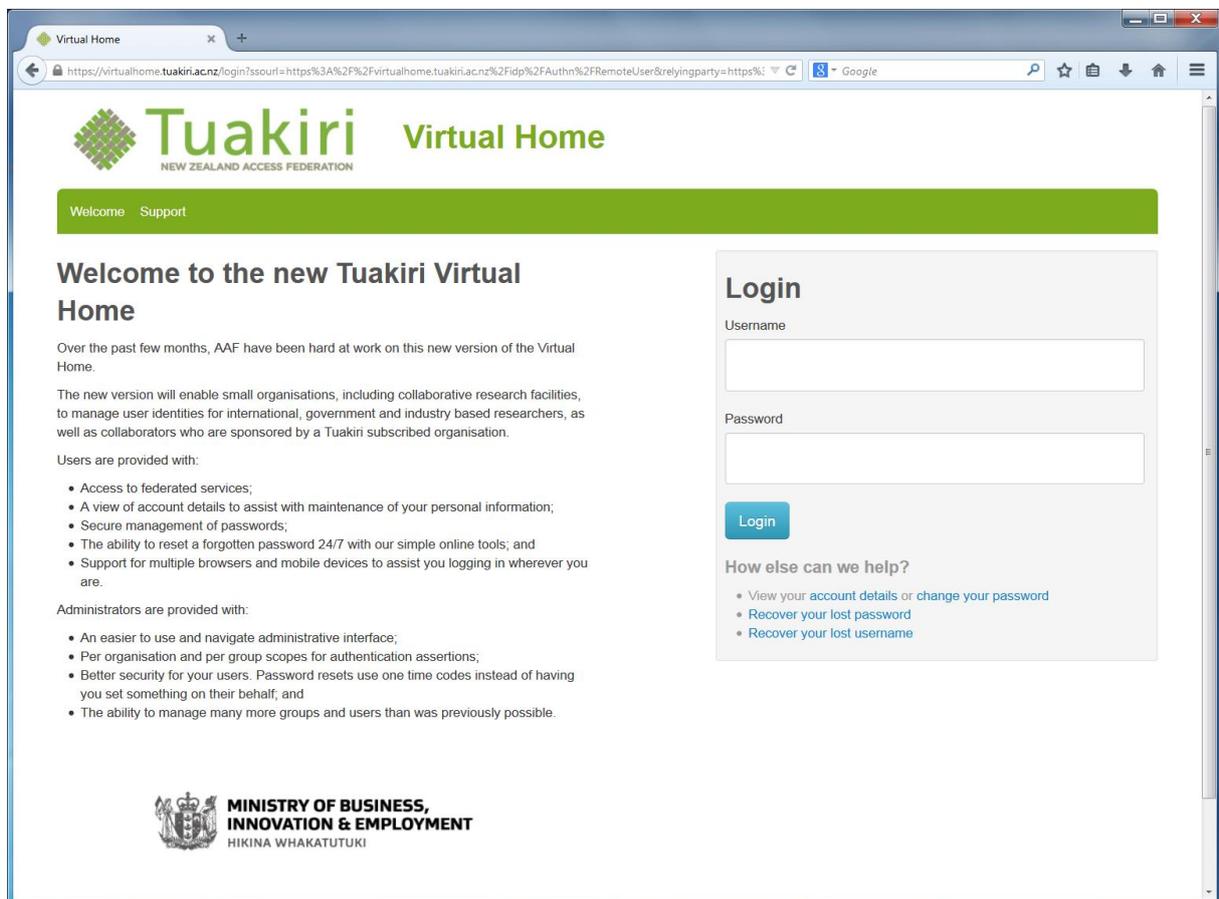
2 October 2014



What is this tool?

The Virtual Home (VH) enables small organisations, including collaborative research facilities, to manage user identities for international, government, and industry based researchers. The VH replaces older software (the VHO) and has been developed by the Australian Access Federation. The VH uses new technology, and is based on real requirements and use cases.

As an administrator, you may need to log into the VH to grant users access or manage existing users. You can log into the VH using your Institution credentials or your VH credentials.

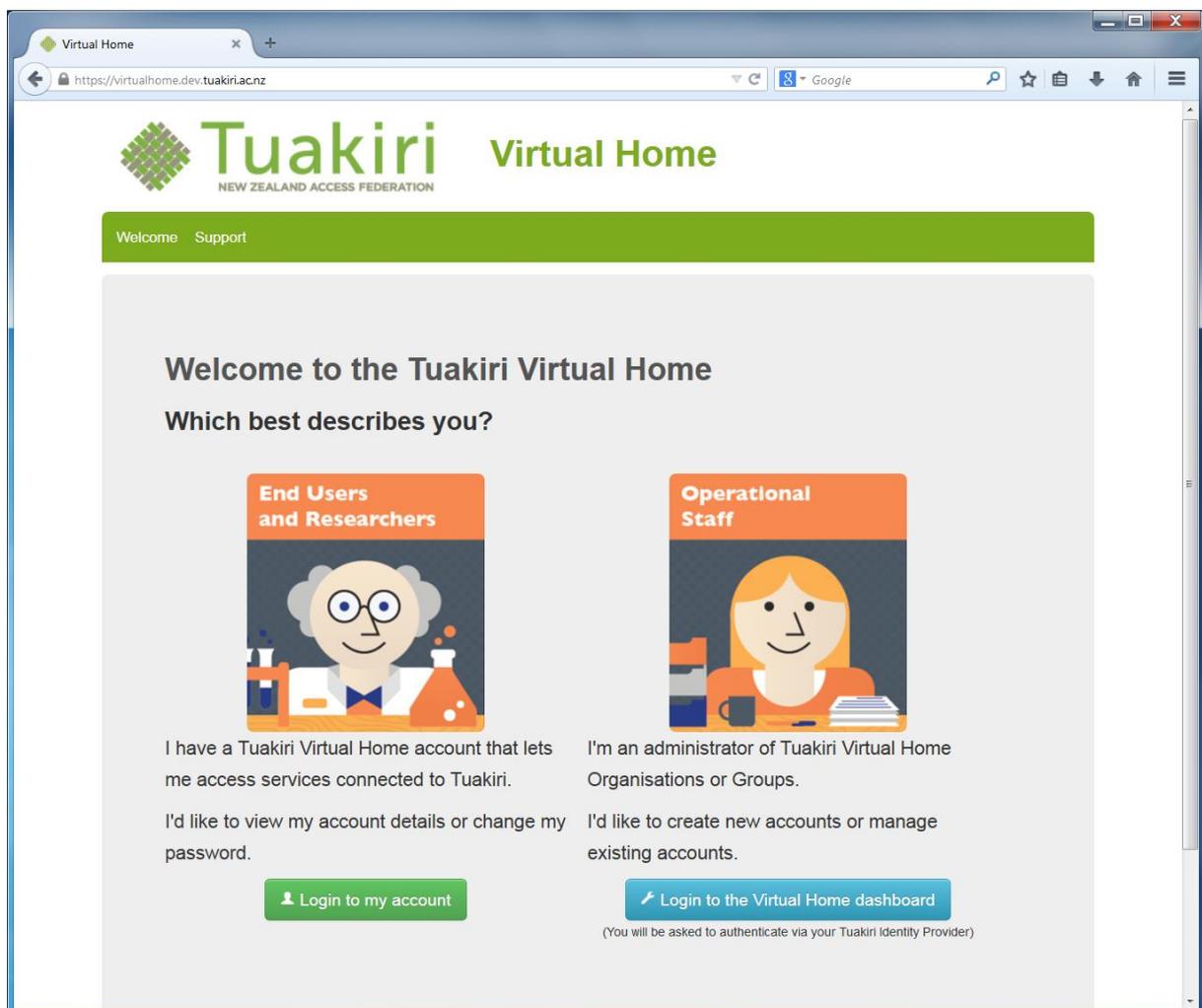


The screenshot shows a web browser window displaying the Tuakiri Virtual Home login page. The page features the Tuakiri logo (a green grid) and the text "Tuakiri Virtual Home NEW ZEALAND ACCESS FEDERATION". A green navigation bar contains "Welcome" and "Support" links. The main heading is "Welcome to the new Tuakiri Virtual Home". Below this, there is a paragraph of introductory text and two bulleted lists: one for "Users are provided with:" and another for "Administrators are provided with:". On the right side, there is a "Login" section with input fields for "Username" and "Password", a "Login" button, and a "How else can we help?" section with three links: "View your account details or change your password", "Recover your lost password", and "Recover your lost username". At the bottom left, there is the logo of the "MINISTRY OF BUSINESS, INNOVATION & EMPLOYMENT HIKINA WHAKATUTUKI".

Logging into the admin portal

To access the administrator portal, visit <https://virtualhome.tuakiri.ac.nz> and click 'Login to the Tuakiri Virtual Home dashboard' (the blue button).

Usually you'd log in using your Institution credentials. If these don't grant you administrator privileges, try your VH credentials if you have them. Otherwise, please get in touch with support@tuakiri.ac.nz.



The screenshot shows a web browser window displaying the Tuakiri Virtual Home login page. The browser's address bar shows the URL <https://virtualhome.dev.tuakiri.ac.nz>. The page features the Tuakiri logo (a green grid) and the text 'Tuakiri Virtual Home NEW ZEALAND ACCESS FEDERATION'. Below the logo is a green navigation bar with 'Welcome' and 'Support' links. The main content area has a heading 'Welcome to the Tuakiri Virtual Home' and a question 'Which best describes you?'. There are two options: 'End Users and Researchers' (with an illustration of a scientist) and 'Operational Staff' (with an illustration of a woman at a desk). Each option has a description and a corresponding login button. The 'Operational Staff' button is blue, while the 'End Users and Researchers' button is green. A note below the blue button states '(You will be asked to authenticate via your Tuakiri Identity Provider)'.

Virtual Home
Virtual Home
https://virtualhome.dev.tuakiri.ac.nz

Tuakiri Virtual Home
NEW ZEALAND ACCESS FEDERATION

Welcome Support

Welcome to the Tuakiri Virtual Home

Which best describes you?

End Users and Researchers

I have a Tuakiri Virtual Home account that lets me access services connected to Tuakiri.

I'd like to view my account details or change my password.

[Login to my account](#)

Operational Staff

I'm an administrator of Tuakiri Virtual Home Organisations or Groups.

I'd like to create new accounts or manage existing accounts.

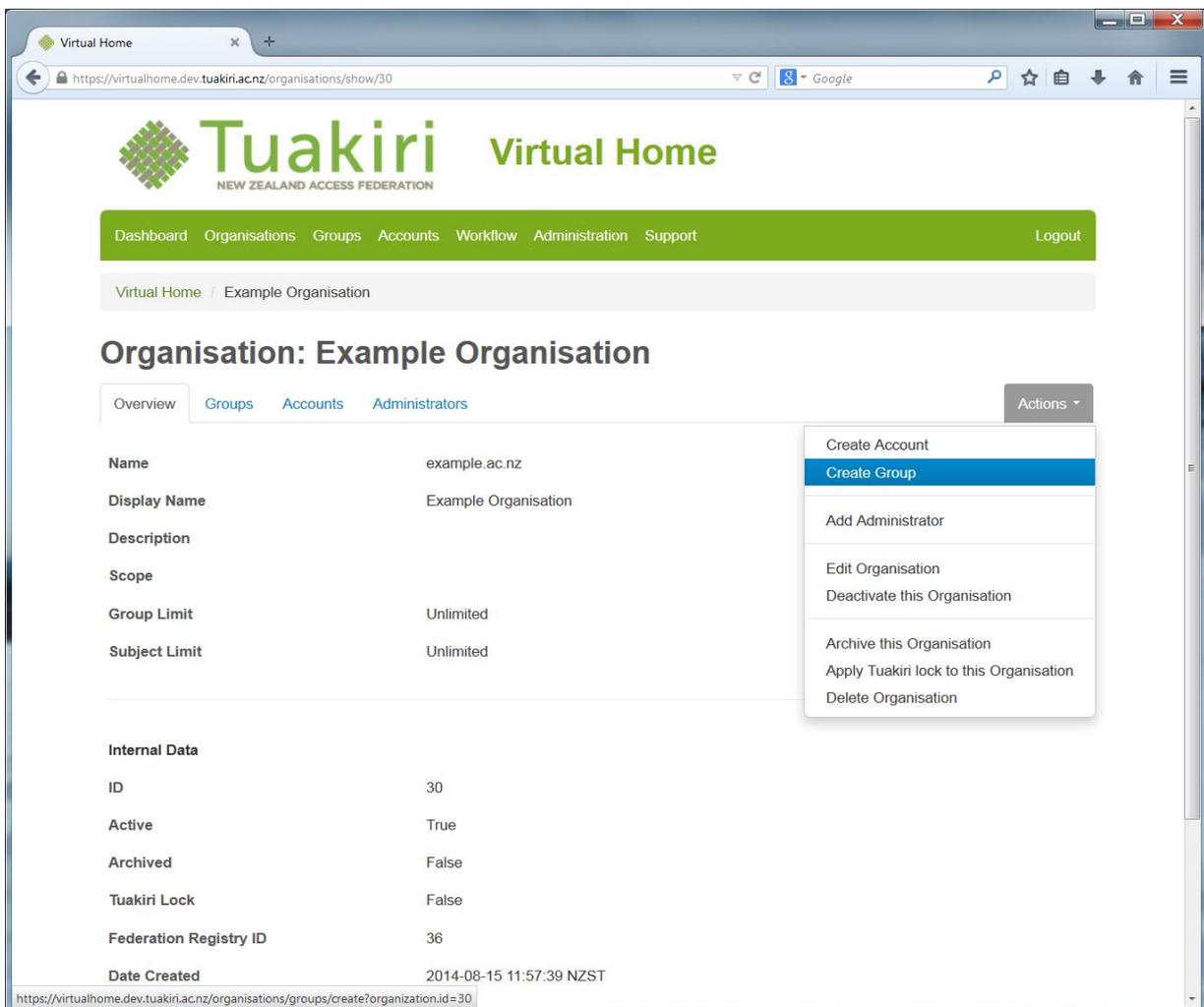
[Login to the Virtual Home dashboard](#)

(You will be asked to authenticate via your Tuakiri Identity Provider)

How do I create groups?

As an Organisation Administrator, you have the ability to manage groups and user accounts. As a Group Administrator, you can only manage user accounts. This guide uses the 'Example Organisation' organisation and the 'Default Group' group.

Select your organisation from the Dashboard (the main page) and find the Actions menu. The Actions menu items are consistent no matter which of the four tabs you are viewing. To create a Group, click the Create Group option to walk you through the process.



The screenshot shows the Tuakiri Virtual Home web application interface. The browser address bar displays the URL: `https://virtualhome.dev.tuakiri.ac.nz/organisations/show/30`. The page header includes the Tuakiri logo and the text "Virtual Home NEW ZEALAND ACCESS FEDERATION". A navigation menu contains links for Dashboard, Organisations, Groups, Accounts, Workflow, Administration, Support, and Logout. Below the navigation menu, the breadcrumb trail reads "Virtual Home / Example Organisation".

The main content area is titled "Organisation: Example Organisation" and features four tabs: Overview, Groups, Accounts, and Administrators. The "Overview" tab is currently selected. To the right of the tabs is an "Actions" dropdown menu. The menu is open, showing the following options: Create Account, Create Group (highlighted in blue), Add Administrator, Edit Organisation, Deactivate this Organisation, Archive this Organisation, Apply Tuakiri lock to this Organisation, and Delete Organisation.

Below the tabs, there are two sections of data:

Organisation Details	
Name	example.ac.nz
Display Name	Example Organisation
Description	
Scope	
Group Limit	Unlimited
Subject Limit	Unlimited

Internal Data	
ID	30
Active	True
Archived	False
Tuakiri Lock	False
Federation Registry ID	36
Date Created	2014-08-15 11:57:39 NZST

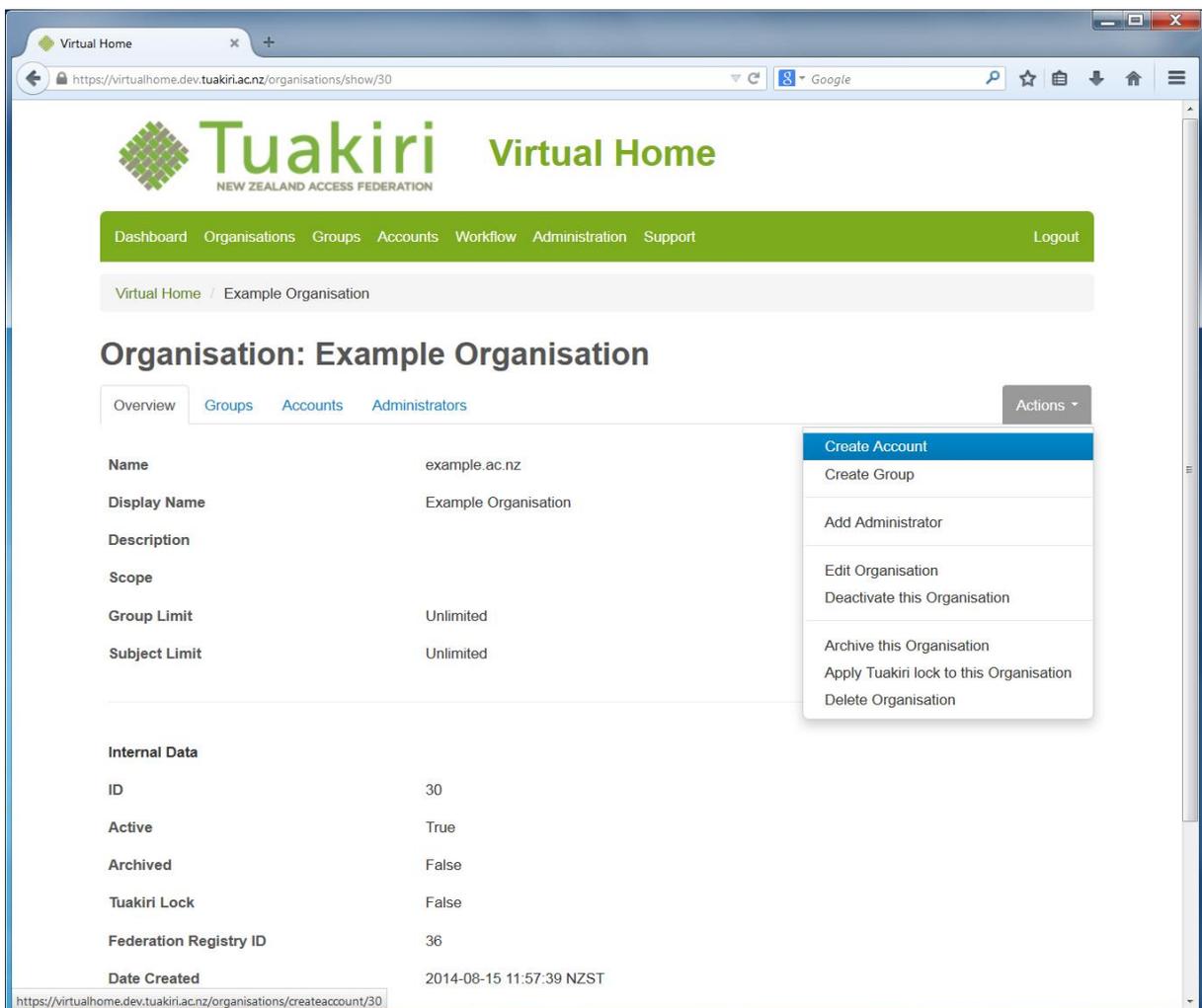
The footer of the page shows the URL: `https://virtualhome.dev.tuakiri.ac.nz/organisations/groups/create?organization.id=30`.

How do I create user accounts?

As an Organisation Administrator, you have the ability to manage groups and user accounts. As a Group Administrator, you can only manage user accounts. This guide uses the 'Example Organisation' organisation and the 'Default Group' group.

Select your organisation from the Dashboard (the main page) and find the Actions menu. The Actions menu items are consistent no matter which of the four tabs (Overview, Groups, Accounts, or Administrators) you are viewing.

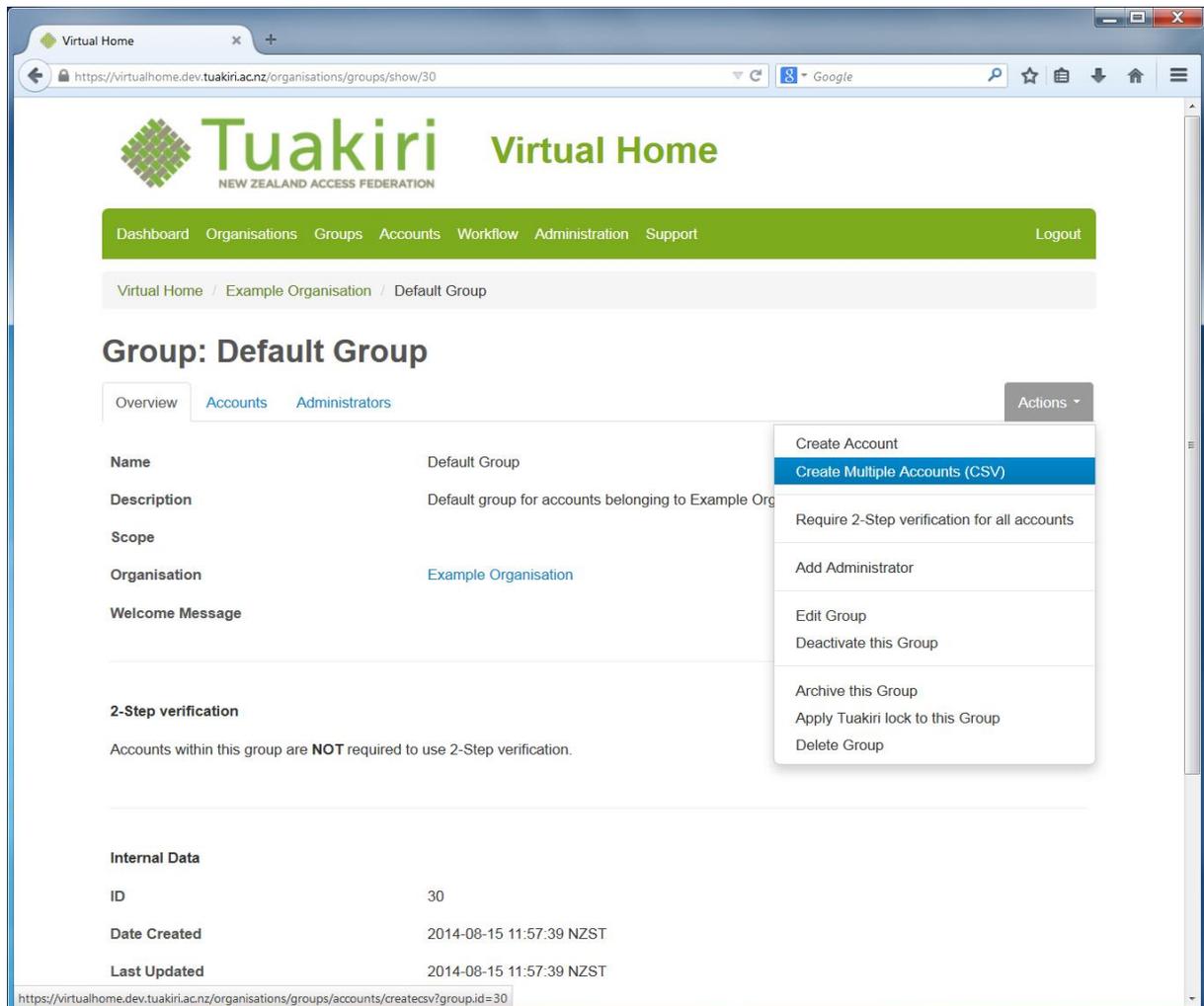
To create an account, click the Create Account option to walk you through the process. The user will then receive a 'welcome email' inviting them to create a username and set a password.



The screenshot shows a web browser window displaying the 'Virtual Home' interface for 'Example Organisation'. The page title is 'Organisation: Example Organisation'. The 'Actions' menu is open, showing the following options: Create Account (highlighted), Create Group, Add Administrator, Edit Organisation, Deactivate this Organisation, Archive this Organisation, Apply Tuakiri lock to this Organisation, and Delete Organisation. The main content area displays a table of organisation details:

Field	Value
Name	example.ac.nz
Display Name	Example Organisation
Description	
Scope	
Group Limit	Unlimited
Subject Limit	Unlimited
Internal Data	
ID	30
Active	True
Archived	False
Tuakiri Lock	False
Federation Registry ID	36
Date Created	2014-08-15 11:57:39 NZST

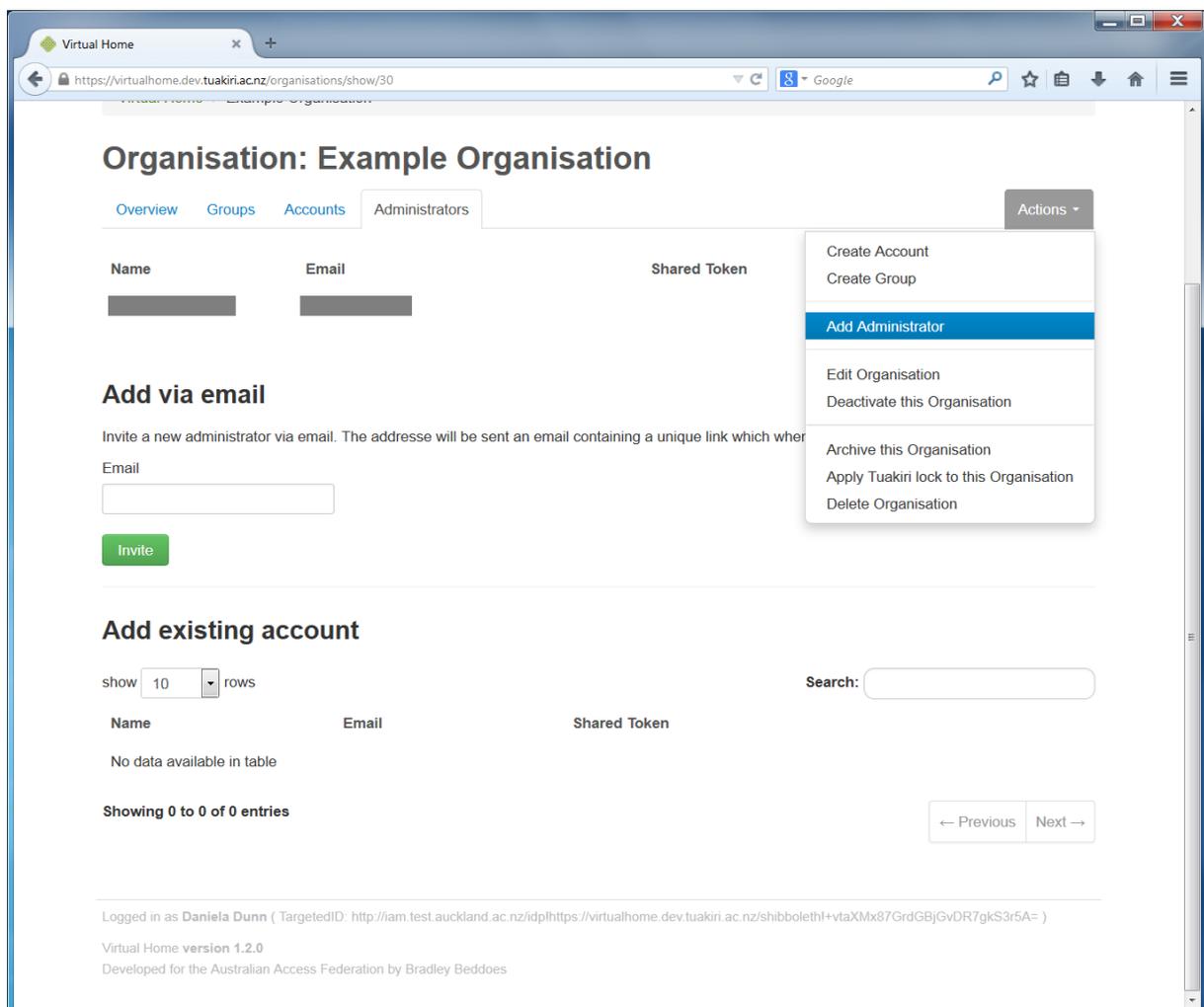
You can also create accounts quicker (or in bulk) by viewing the Group first, and then clicking on the Actions menu. The Create Account option still exists, but you are also given the option to Create Multiple Accounts via CSV file upload. You will see instructions on how to create the CSV file.



How do I add administrators?

Use the Actions menu to click the Add Administrator button.

You can either search for the user using the search tool and click the green Add button next to their name (N.B. the user must have previously logged into the VH for them to appear), or alternatively use the 'Invite' button to automatically invite and grant the administrator privileges to this user.



The screenshot shows a web browser window with the URL `https://virtualhome.dev.tuakiri.ac.nz/organisations/show/30`. The page title is "Organisation: Example Organisation". The "Administrators" tab is selected, and the "Actions" menu is open, highlighting the "Add Administrator" option. The page includes a table with columns for Name, Email, and Shared Token, and a search bar. Below the table, there are sections for "Add via email" and "Add existing account".

Organisation: Example Organisation

Overview Groups Accounts Administrators Actions

Name	Email	Shared Token

Add via email

Invite a new administrator via email. The addressee will be sent an email containing a unique link which when clicked will add them as an administrator.

Email

Add existing account

show 10 rows Search:

Name	Email	Shared Token
No data available in table		

Showing 0 to 0 of 0 entries

← Previous Next →

Logged in as Daniela Dunn (TargetedID: http://iam.test.auckland.ac.nz/idphttps://virtualhome.dev.tuakiri.ac.nz/shibboleth/vtaXMx87GrdGBjGvDR7gkS3r5A=)

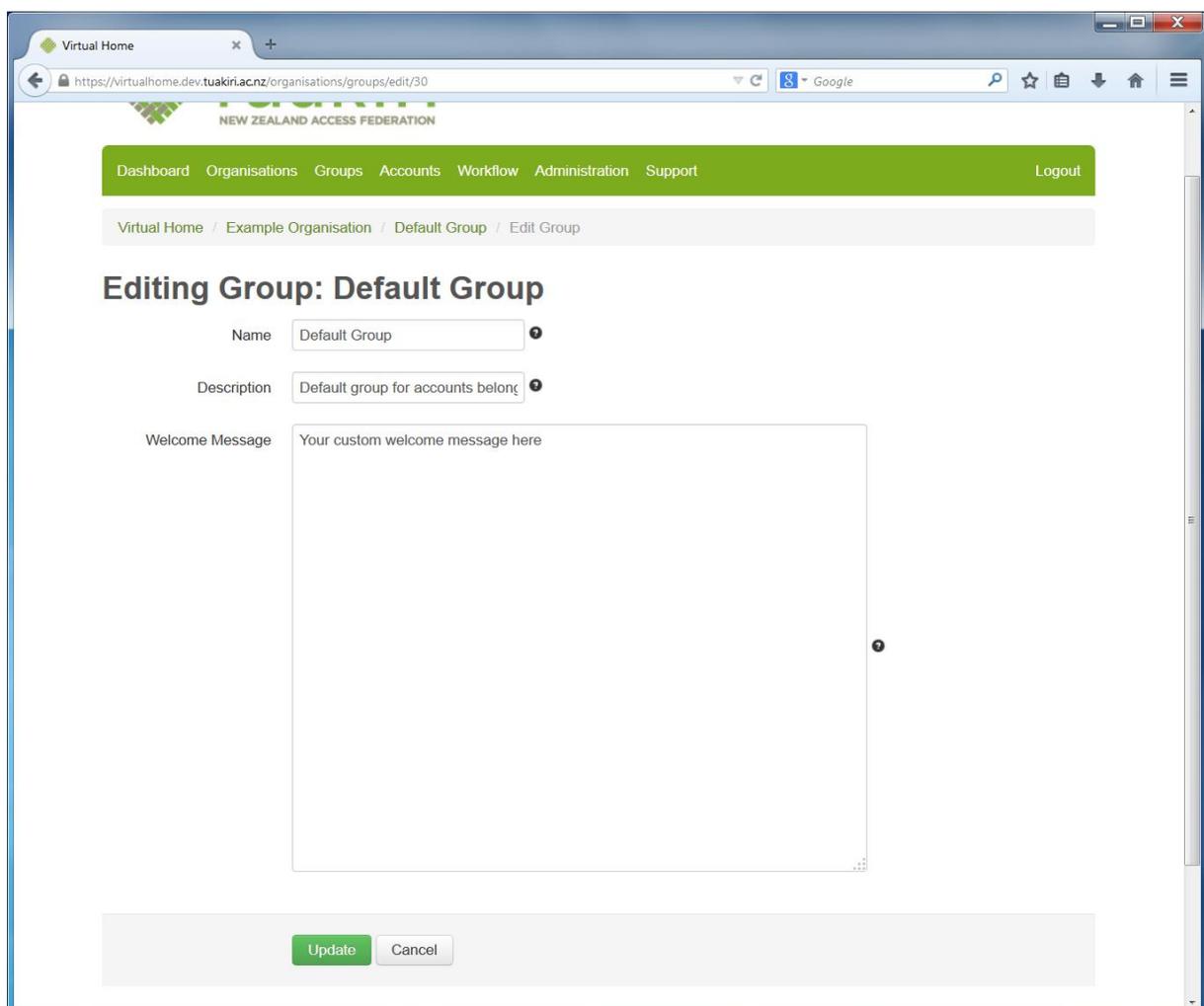
Virtual Home version 1.2.0
Developed for the Australian Access Federation by Bradley Beddoes

How do I customise the invitation/welcome email for users?

Administrators can add a custom message to the invitation email that is sent to new users. Navigate to the Group (where you intend to add users), click the Actions menu, and then Edit Group.

This will present a screen where you can edit the name of the Group, but more importantly, add a custom message that is added to the user's invitation email. Once this is saved, your message will appear in the invitation email for new accounts as a paragraph above the heading "Your action is required".

Note: Each Group can have a unique message if you desire. All users invited to this Group will see the same invitation email message.



The screenshot shows a web browser window with the URL <https://virtualhome.dev.tuakiri.ac.nz/organisations/groups/edit/30>. The page title is "Editing Group: Default Group". The navigation menu includes "Dashboard", "Organisations", "Groups", "Accounts", "Workflow", "Administration", "Support", and "Logout". The breadcrumb trail is "Virtual Home / Example Organisation / Default Group / Edit Group". The form contains three fields: "Name" (Default Group), "Description" (Default group for accounts belong), and "Welcome Message" (Your custom welcome message here). The "Welcome Message" field is a large text area. At the bottom, there are "Update" and "Cancel" buttons.

How do I deal with a user who has been locked out?

Users are locked out of their account when they fail to login five or more times. After three failed logins, the user will also be presented with a CAPTCHA on the login screen. After five failed logins, the user's account is locked out, they will no longer be able to login, they will receive an email telling them their account has been locked out, and they must contact an administrator to have their account unlocked.

The account can be re-activated by navigating to the account, clicking the Actions menu, and selecting "Activate this Account".

The screenshot shows a web browser window displaying the 'Virtual Home' interface for the Tuakiri New Zealand Access Federation. The page title is 'Account for: John Connor'. A blue banner indicates the account is 'Unavailable' with the message: 'This account is currently unavailable. To correct this please ensure the account is active and has not been locked. In addition the owning organisation and group must currently be functional. The user associated with this account will be unable to login at this time.' Below this, there are tabs for 'Overview' and 'Event Log', and an 'Actions' dropdown menu. The 'Actions' menu is open, showing options: 'Edit Account', 'Generate Password Reset Code', 'Reset 2-Step verification secret', 'Require this account to use 2-Step verification', 'Activate this Account' (highlighted in blue), 'Apply administrative lock', 'Archive this Account', 'Apply Tuakiri lock to this Account', and 'Delete Account'. The 'Account Details' section is partially visible, showing 'Core Attributes' such as Common Name (John Connor), Email (redacted), Shared Token, Display Name (John Connor), eduPersonAssurance, and eduPersonAffiliation (1 member).

Other administrative tasks

As an administrator, there are many other things you can do:

- Lock an account out (and activate it, if it has been locked out previously)
- Generate a password reset code, which may be sent via email or via SMS
- Require an individual account or an entire group to use 2-step verification (using an authentication app on the user's mobile device)
- Reset the 2-step verification secret for an account
- Resend the invitation/welcome email
- View the account finalisation URL (and send it to the user, if they are unable to finalise their account using the invitation/welcome email)

Where can I find more help?

Contact Tuakiri support on support@tuakiri.ac.nz.