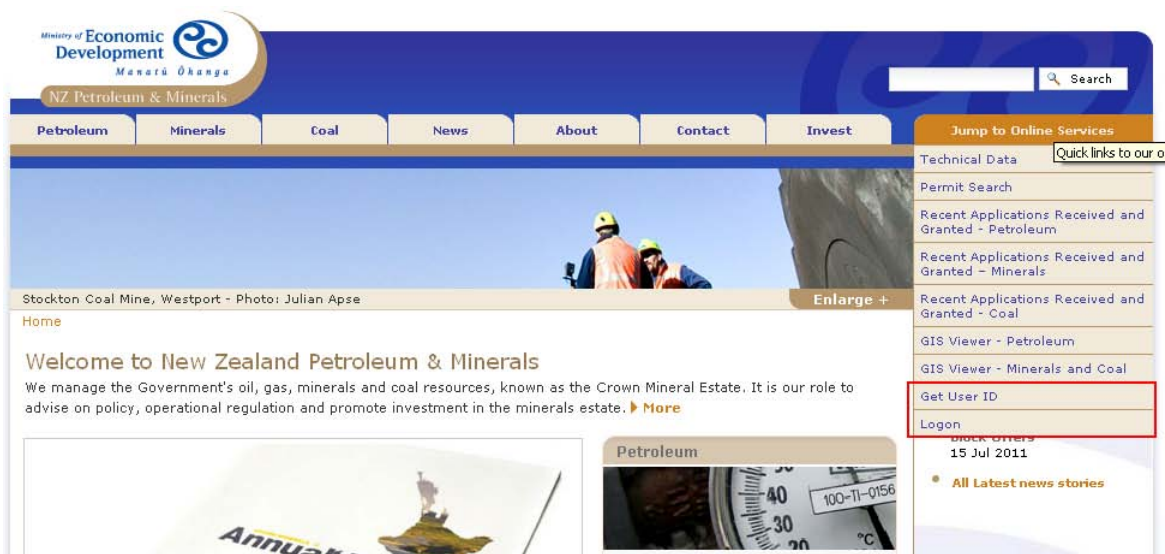


# Portfolio Management – Quick User Guide

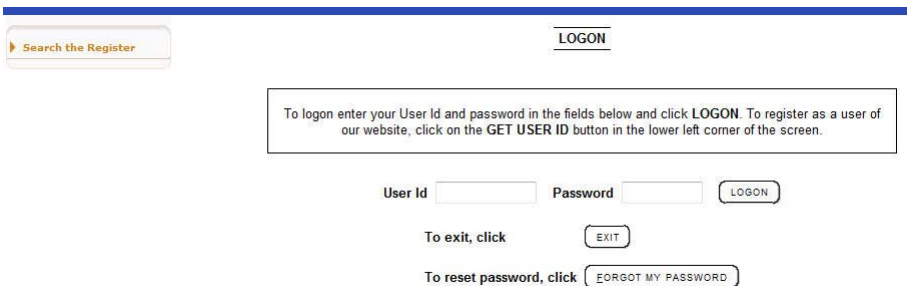
Logon to your permit portfolio.....	1
View your Permits and Compliance.....	2
Add Subsequent Users .....	3
Maintain Subsequent Users .....	4
Update your contact details .....	5

## Logon to your permit portfolio

1. Go to [www.nzpam.govt.nz](http://www.nzpam.govt.nz) > Jump to Online Services > Logon.



2. Enter your User ID and password (this will have been emailed to you when you registered).



3. Click **Logon**.

## View your Permits and Compliance

- Logon > Portfolio Management > View Permits.

- ▶ Portfolio Management
- ▶ View Permits
- ▶ Update Address and Contact Details
- ▶ Search the Register
- ▶ Compliance
- ▶ User Administration

### CLIENT PERMITS

[REFRESH](#) | [EXIT](#)

To view a permit, select the relevant permit hyperlink.

To view permits for a particular client, select a client then press Enter to retrieve permits.

To change the sort order of the clients, change the Order by and/or Ascending/Descending options and select REFRESH.

Order by
Client Name ▼
Ascending ▼

Client No	Client Name	Address	Category
101033	Portfolio Management	33 Tommy bowes	

Sort columns by clicking on headers

Granted Permits for selected client							
Map Link	Permit	Commodity	Type	Location	Offshore	Operation	Granted Date
	<a href="#">52543</a>	Petroleum	Exploration Permit	Bellona Basin	No		13-Jan-2012
	<a href="#">52458</a>	Minerals	Mining Permit	Otago	No		09-Jan-2012
	<a href="#">52386</a>	Minerals	Mining Permit	Auckland	No	UAT	17-Oct-2011

Click to view GIS map →

Click to view permit → [52386](#)

- View the permit by clicking on the blue hyperlink.

For Agents with multiple clients, you will need to select individual client names and refresh the page to view only those permits.

### • Work Programme Obligations

To view your Obligations (as per your permit conditions), select **WP Compliance** on the Permit Summary page.

### PERMIT SUMMARY

[WP COMPLIANCE](#) | [STAT COMPLIANCE](#) | [PRINT](#) | [EXIT](#)

[EXPAND ALL](#) | [COLLAPSE ALL](#)

You can hover your mouse over the Obligation name to view the Work Programme Condition details.

### WORK PROGRAMME OBLIGATIONS

[PRINT](#) | [EXIT](#)

This screen displays all work programme obligations for the selected permit and reporting period.

The information provided on this website, including the details and status of a permit or licence holder's obligations under the permit or licence, any relevant legislation or regulations made thereunder, is for guidance only. The Ministry of Economic Development (MED) makes no warranty, express or implied, nor assumes any liability for the accuracy or completeness of such information or for reliance or use of such information.

The MED may change, delete, add to, or otherwise amend information contained on this website without notice.

This disclaimer is to be read in conjunction with other disclaimers that form part of this website.

Permit Details						
Number	Client	Commodity	Permit Type	Commenced	Location	Offshore
52458	Portfolio Management	Minerals	Mining Permit	09-Jan-2012	Otago	No

**Filter By**

Due within: ALL

Order By: Obligation Name Descending

Work Programme Obligations for the period:						
Obligation	Ref	Activity Due	Activity Status	Data Due	Data Status	
Appraisal	215738	08-Jan-2013	Pending	14-Mar-2013	Pending	Complete a programme of appraisal activities

Hover mouse over Obligation to view Work Programme details

- **Statutory Obligations**

To view your Statutory Obligations, e.g. Reporting, Annual Fees and Royalties, as per the relevant regulations, select **Stat Compliance** on the Permit Summary page.



- **Compliance**

To view your compliance for all permits, select **Compliance** from the main Portfolio Management menu.



### Add Subsequent Users

To create a Subsequent User go to **User Administration > User Details > Create User**. Complete new user details and click **Save**.



#### User Details

First Name: \*

Last Name: \*

Password: \*

Confirm Password: \*

Password must consist of 7 alphanumeric characters including at least one alphabetic and one numeric, e.g. pass123. (note no spaces or punctuation can be used)

Telephone: \* 

Country Code	Area Code	Phone Number
+64	<input type="text"/>	<input type="text"/>

Fax: 

Country Code	Area Code	Phone Number
+64	<input type="text"/>	<input type="text"/>

Email Address: \*

Include user's password in email:

User's password will be included in the email confirmation when box is checked.

## Maintain Subsequent Users

- Update a subsequent user

Go to **User Administration > User Details > Modify User.**

### LIST OF USERS

CANCEL

Customer: SOLID ENERGY NEW ZEALAND LIMITED (BAT) BAT

Click on the user  
you wish to update

Please be aware that you are responsible for maintenance of the following user accounts as explained in the NZP&M Portfolio Management Terms & Conditions. Please select a user to view/modify details.

<u>First Name</u>	<u>Last Name</u>	<u>User Id</u>	<u>Administrator Type</u>	<u>Status</u>
<a href="#">Bruce</a>	<a href="#">Wayne</a>	100127428		Active
<a href="#">Clark</a>	<a href="#">Kent</a>	100127417		Active
<a href="#">Dave</a>	<a href="#">Lizewski</a>	100127439		Active
<a href="#">Peter</a>	<a href="#">Parker</a>	100126618	Global	Active

Select the user you wish to update from the list, fill out the relevant fields and click **Save**.

### User Details

User Id: 100127417

First Name: \* CLARK

Last Name: \* KENT

Password:

Confirm Password:

Password must consist of 7 alphanumeric characters including at least one alphabetic and one numeric, e.g. pass123. (note no spaces or punctuation can be used)

Telephone: \* Country Code +64 Area Code 4 Phone Number 4444444

Fax: +64

Email Address: \* super.clark@med.govt.nz

Include user's password in email:

User's password will be included in the email confirmation when box is checked.

Status: Active

Amend Status to: No Change

- Reactivate user

E.g. after entering incorrect password three times. Select the user you wish to reactivate, change their status to **Active** and click **Save**.

Status: MAX Failed Logins

Amend Status to:

- Remove users access

E.g. they no longer work for the permit holder. Select the user you wish to remove, amend status to **Closed** and click **Save**.

## Forgotten your User ID and/or Password

- [Forgotten your User ID](#)

You will need to contact us: Phone: 0508 263 782  
Email: [nzpam@med.govt.nz](mailto:nzpam@med.govt.nz).

- [Forgotten your password](#)

Go to **Jump to Online Services > Login > Forgot my password.**

You will need to enter your User ID, and your password will be emailed to your email address.

## Update your contact details

- Go to **Portfolio Management > View Permit > Update Contact details.**

Update the relevant fields and click **Save**.

### CLIENT DETAILS

SAVE | EXIT

Update the client name and address information as required, then select SAVE.

To update address details, click on the hyperlink for the relevant address type.

Client	101033	Type	Organisation
Address To Use	* Postal	Category	
Name	Portfolio Management	Organisation Type	* RCOMP
Contact	* Mr Portfolio	Company Number	* 1
Last Name	* Management		
Email			
Business	* NZ 4 4444444		
Mobile	NZ	Fax	NZ

Addresses	
Type	Address
<a href="#">Physical</a>	33 Tommy bowes, 1111
<a href="#">Postal</a>	* 33 Tommy bowes, 1111
<a href="#">Address for Service</a>	* 33 Tommy bowes, 1111

**Please note:** to update your Address for Service you will still need to contact NZP&M as we are required to make sure this is a physical address.

**For further information on Portfolio Management please refer to the Portfolio Management Authority to Act as a Global User, Legal Disclaimer, and Terms and Conditions of Use form, or contact us:**

Freephone (within New Zealand): 0508 263 782

International Calls: +64 3 962 6179

Email: [nzpam@med.govt.nz](mailto:nzpam@med.govt.nz)

PO Box 1473  
33 Bowen Street  
Wellington 6140  
New Zealand