



*National Fuel*<sup>®</sup>

## Security Administrator (SA) Training

## Training Topics

- Introduction of the Security Administrator
- Adding and Maintaining Users
- Assigning Roles and Contact Types
- Unlocking Accounts and Changing Passwords
- Account Level Security Administrators
- Users and Agency Agreements
- User Summary

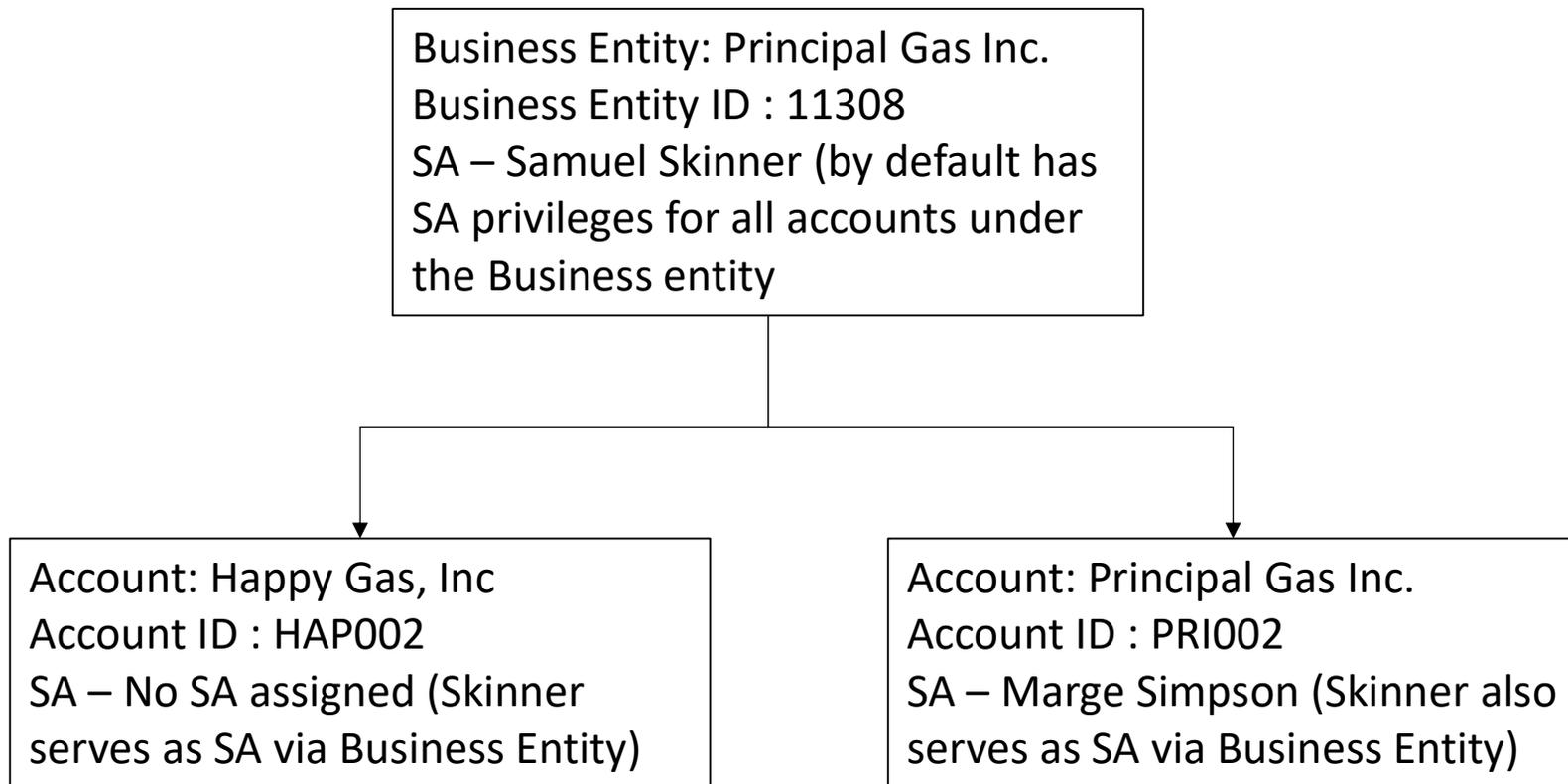
# Introduction of the Security Administrator (SA)

## General Information

- National Fuel security administrator (SA) access is assigned to entities and associated accounts.
- Business entities can have several accounts if they wish to keep certain divisions within a business structure separate. All accounts must fall under one business entity.
- The highest level SA is at the business entity level. This SA can only be assigned or removed via a signed Security Administrator Request Form.
- Business entity level SAs can assign additional SAs at the account level.
- SAs maintain users and assign access and permissions to the users for specific accounts. SAs can also unlock users and reset passwords.
- SAs can create agency agreements to assign responsibilities to agents. (see separate training on agency agreements)

## Business Entities and Accounts Organizational Chart

Below is an example of a Business Entity with two different accounts.



## Getting to the Security Administrator Menu

After an SA has been assigned, and the SA has logged into the EBB to undertake tasks on the NFG System, SAs can click on “Customer Activities”, then “Security Administration.”



# Maintaining Users

To add, remove, or change the rights of users, select “Maintain Users.”

The screenshot displays the Empire Pipel website interface. The top left corner features the logo for Empire Pipel, a National Fuel Gas Company. A navigation menu is visible on the left side, listing various options such as Customer Activities, Nominations, Capacity Release, Reports, Security Administration, Agency, Informational Postings, Site Map, Business System, Change My Password, and My System Profile. The main content area is titled "Main Menu > Customer Activities > Security Administration" and contains a sub-menu for "Agency" with options for "Create Agency Agreement" and "Maintain Agency Agreement". A red arrow points to the "Maintain Users" link, which is described as "Maintain security administrator users for business entities and accounts."

## Reviewing Users

- In this example we are going to start with a brand new business entity where the only user is the SA. Most business entities will already have users assigned when they first log in.
- The basic information about the user can be edited by selecting the “Edit User Data”

Maintain Users | Summary

Business Entity ID 11308      Principal Gas, Inc.

Users										1 of 1
User ID	Locked?	First Name	Last Name	Phone	Ext.	E-mail				
skinnners	<input type="checkbox"/>	Seymour	Skinner	716/823-2222		russm@natfuel.com	<a href="#">Edit User Data</a>	<a href="#">User Functions</a>	<a href="#">Change Pswd</a>	

[Add User](#)      [Import User](#)

[Return to Search](#)

[Maintain Users](#) | [Summary](#)



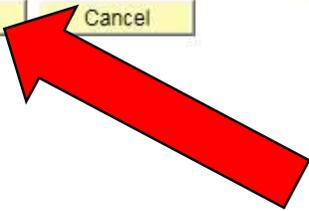
## Required Information

- Fields that are required for each user are indicated with an asterisk.
- Select the save button to save any changes.

**Contact Maintenance**

Business Entity ID **11306** User ID **skinners**

<p><b>Name:</b> Skinner, Seymour</p> <p><b>*First Name:</b> <input type="text" value="Seymour"/> x</p> <p><b>Middle Name:</b> <input type="text"/></p> <p><b>*Last Name:</b> <input type="text" value="Skinner"/></p> <p><b>Title:</b> <input type="text"/> <b>Suffix:</b> <input type="text"/></p> <p><b>*Address 1:</b> <input type="text" value="123 mile road"/></p> <p><b>Address 2:</b> <input type="text"/></p> <p><b>Address 3:</b> <input type="text"/></p> <p><b>Address 4:</b> <input type="text"/></p> <p><b>*Country:</b> <input type="text" value="USA"/> 🔍</p> <p><b>*State:</b> <input type="text" value="NY"/> 🔍</p> <p><b>*City:</b> <input type="text" value="main"/> <b>*Zip Code:</b> <input type="text" value="14221"/></p>	<p><b>Work Phone:</b> <input type="text" value="716/823-2222"/> <b>Ext.:</b> <input type="text"/></p> <p><b>Alternate Phone:</b> <input type="text"/> <b>Ext.:</b> <input type="text"/></p> <p><b>24 Hour Phone:</b> <input type="text"/> <b>Ext.:</b> <input type="text"/></p> <p><b>Cell Phone:</b> <input type="text"/></p> <p><b>Fax Number:</b> <input type="text"/></p> <p><b>Pager:</b> <input type="text"/></p> <p><b>*Email Address:</b> <input type="text" value="russsm@natfuel.com"/></p> <p><b>Alt. Email:</b> <input type="text"/></p> <p><b>IM Address:</b> <input type="text"/></p>
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## Reviewing User Functions

The SA can review each user's rights by selecting "User Functions."

Maintain Users Summary

Business Entity ID 11308 Principal Gas, Inc.

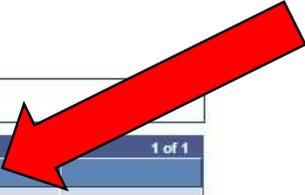
Users 1 of 1

User ID	Locked?	First Name	Last Name	Phone	Ext.	E-mail		
skidders	<input type="checkbox"/>	Seymour	Skinner	716/823-2222		russm@natfuel.com	<a href="#">Edit User Data</a>	<a href="#">User Functions</a> <a href="#">Change Pswd</a>

Add User Import User

[Return to Search](#)

Maintain Users | [Summary](#)



# Business Entity and Account Functions

- In this example there are two accounts associated with this business entity.
- By default the SA will be assigned all roles and contact types that are required for an account. These roles will be “greyed out” and the SA will not be able to remove themselves. They are only removed if the roles are assigned to another user.

**Function Maintenance**

Business Entity ID **11308**      **Principal Gas, Inc.**      User ID **skinners**

<b>Name:</b> Skinner, Seymour <b>Address:</b> 123 mile road <b>Address 2:</b> <b>Address 3:</b> <b>Address 4:</b> <b>Country:</b> USA <b>State:</b> NY <b>City:</b> main <b>Zip Code:</b> 14221 <a href="#">Edit User Info</a>	<b>Work Phone:</b> 716/823-2222      Ext.: <b>Alternate Phone:</b> Ext.: <b>24 Hour Phone:</b> Ext.: <b>Cell Phone:</b> <b>Fax:</b> <b>Pager:</b> <b>Email Address:</b> russm@nattuel.com <b>Alternate Email:</b> <b>IM Address:</b>
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**Business Entity Roles**

- Create/Maintain PDAs
- Security Administrator (SA)
- TCPL Marketer Inquiry
- View O&A Statements
- View Pipeline Allocation Strmts

**Accounts**

<b>HAP002</b> <b>Happy Gas, Inc.</b>	<b>Roles</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Capacity Release</li> <li><input type="checkbox"/> Invoicing</li> <li><input type="checkbox"/> Market Pooling Aggregator</li> <li><input type="checkbox"/> Nominations</li> <li><input type="checkbox"/> Security Administration Report</li> <li><input type="checkbox"/> TCPL Marketer Inquiry</li> <li><input type="checkbox"/> View Allocation Statements</li> <li><input type="checkbox"/> View Contract Summary Report</li> <li><input type="checkbox"/> View Imbalance Reports</li> <li><input type="checkbox"/> View Interconnect</li> <li><input type="checkbox"/> View Storage Reports</li> </ul>	<b>Contact Types</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Accounts Payable Alternate</li> <li><input checked="" type="checkbox"/> Accounts Payable Primary</li> <li><input type="checkbox"/> Critical Notices</li> <li><input checked="" type="checkbox"/> Imbalance Resolution Primary</li> <li><input type="checkbox"/> Imbalance Resolution Alternate</li> <li><input type="checkbox"/> Invoice Notify Alternate</li> <li><input type="checkbox"/> Invoice Contact</li> <li><input checked="" type="checkbox"/> Invoice Notify Primary</li> <li><input type="checkbox"/> Non-Critical Notices</li> <li><input type="checkbox"/> Scheduled Qty Cut Notification</li> </ul>
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<b>PR002</b> <b>Principal Gas, Inc.</b>	<b>Roles</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Capacity Release</li> <li><input type="checkbox"/> Invoicing</li> <li><input type="checkbox"/> Market Pooling Aggregator</li> <li><input type="checkbox"/> Nominations</li> <li><input type="checkbox"/> Security Administration Report</li> <li><input type="checkbox"/> TCPL Marketer Inquiry</li> <li><input type="checkbox"/> View Allocation Statements</li> <li><input type="checkbox"/> View Contract Summary Report</li> <li><input type="checkbox"/> View Imbalance Reports</li> <li><input type="checkbox"/> View Interconnect</li> <li><input type="checkbox"/> View Storage Reports</li> </ul>	<b>Contact Types</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Accounts Payable Alternate</li> <li><input checked="" type="checkbox"/> Accounts Payable Primary</li> <li><input type="checkbox"/> Critical Notices</li> <li><input checked="" type="checkbox"/> Imbalance Resolution Primary</li> <li><input type="checkbox"/> Imbalance Resolution Alternate</li> <li><input type="checkbox"/> Invoice Notify Alternate</li> <li><input type="checkbox"/> Invoice Contact</li> <li><input checked="" type="checkbox"/> Invoice Notify Primary</li> <li><input type="checkbox"/> Non-Critical Notices</li> <li><input type="checkbox"/> Scheduled Qty Cut Notification</li> </ul>
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Save      Cancel

## Adding a User

- To add users, return to the “Maintaining Users” page, and click the button at the bottom of the page. (Note : Use Import User if the user exists in another subsidiary or account, see page 21)

The screenshot shows a web interface for managing users. At the top, there are tabs for 'Maintain Users' and 'Summary'. Below this, the business entity is identified as 'Principal Gas, Inc.' with ID '11308'. A table lists the current users, with one user named 'Seymour Skinner' (User ID: skimmers). Below the table, there are two buttons: 'Add User' and 'Import User'. A red arrow points to the 'Add User' button. There is also a 'Return to Search' button and a breadcrumb trail 'Maintain Users | Summary'.

User ID	Locked?	First Name	Last Name	Phone	Ext.	E-mail			
skimmers	<input type="checkbox"/>	Seymour	Skinner	716/823-2222		russsm@natfuel.com	<a href="#">Edit User Data</a>	<a href="#">User Functions</a>	<a href="#">Change Pswd</a>

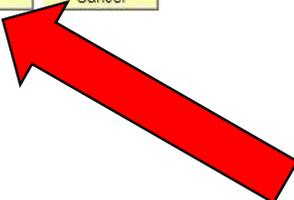
## Adding Users

When adding a user some of the fields will be filled in with the default values from the business entity. These defaults can be changed, however all necessary fields are noted with an asterisk. Once the required fields are complete the user can be created by selecting the save option.

Contact Maintenance

Business Entity ID 11306

<p>Name:</p> <p>*First Name: <input type="text"/></p> <p>Middle Name: <input type="text"/></p> <p>*Last Name: <input type="text"/></p> <p>Title: <input type="text"/> Suffix: <input type="text"/></p> <p>*Address 1: <input type="text" value="6363 Main Street"/></p> <p>Address 2: <input type="text"/></p> <p>Address 3: <input type="text"/></p> <p>Address 4: <input type="text"/></p> <p>*Country: <input type="text" value="USA"/> <input type="button" value="Q"/></p> <p>*State: <input type="text" value="NY"/> <input type="button" value="Q"/></p> <p>*City: <input type="text" value="Williamsville"/> *Zip Code: <input type="text" value="14221"/></p>	<p>Work Phone: <input type="text"/> Ext.: <input type="text"/></p> <p>Alternate Phone: <input type="text"/> Ext.: <input type="text"/></p> <p>24 Hour Phone: <input type="text"/> Ext.: <input type="text"/></p> <p>Cell Phone: <input type="text"/></p> <p>Fax Number: <input type="text"/></p> <p>Pager: <input type="text"/></p> <p>*Email Address: <input type="text"/></p> <p>Alt. Email: <input type="text"/></p> <p>IM Address: <input type="text"/></p>
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## Contacts

Users who have no roles but are authorized in the system are referred to as “contacts.” Contacts have no User ID or password. When a user is first created they will be considered a contact. In this example we have added Maggie Simpson as a contact. If we select “User Functions”, we can give her roles that require creating a User ID.

Maintain Users Summary

Business Entity ID 11306 Principal Gas Company

Users 1-4 of 4

User ID	Locked?	First Name	Last Name	Phone	Ext.	E-mail		
		Maggie	Simpson	716/555-5555		russm@natfuel.com	<a href="#">Edit User Data</a>	<a href="#">User Functions</a>
skidders	<input type="checkbox"/>	Seymour	Skinner	716/823-2222		russm@natfuel.com	<a href="#">Edit User Data</a>	<a href="#">User Functions</a> <a href="#">Change Pswd</a>

[Add User](#)

[Return to Search](#)

Maintain Users | [Summary](#)



## Assigning Roles and Contact Types

- The SA can assign roles and contact types by checking the boxes in the account that you want to authorize for that user.
- As you scroll over the role or contact type a brief description of what abilities the user will have when assigned that role or contact type will appear.
- Once you have assigned the roles and contact types select, save.

The screenshot displays the 'Function Maintenance' interface for assigning roles and contact types to a user. The user is 'simpsonm' and the business entity is 'Principal Gas, Inc.' (ID 11308). The user's contact information is shown, including phone numbers and email addresses.

**Business Entity Roles:**

- Create/Maintain PDAs
- Security Administrator (SA)
- TCPL Market Inquiry
- View O&A Statements
- View Pipeline Allocation Stmt

**Accounts:**

**HAP002 - Happy Gas, Inc.**

**Roles:**

- Capacity Release
- Invoicing
- Market Profile Aggregator
- Nominations
- Security Administration Report
- Security Administrator (SA)
- TCPL Market Inquiry
- View Allocation Statements
- View Contract Summary Report
- View Imbalance Reports
- View Interconnect
- View Storage Reports

**Contact Types:**

- Invoice Contact
- Accounts Payable Primary
- Accounts Payable Alternate
- Imbalance Resolution Primary
- Imbalance Resolution Alternate
- Invoice Notify Primary
- Invoice Notify Alternate
- Scheduled Qty. Cud Notification
- Critical Notices
- Non-Critical Notices

**PR1002 - Principal Gas, Inc.**

**Roles:**

- Capacity Release
- Invoicing
- Market Profile Aggregator
- Nominations  All Contracts?
- Security Administration Report
- Security Administrator (SA)
- TCPL Market Inquiry
- View Allocation Statements
- View Contract Summary Report
- View Imbalance Reports
- View Interconnect
- View Storage Reports

**Contact Types:**

- Invoice Contact
- Accounts Payable Primary
- Accounts Payable Alternate
- Imbalance Resolution Primary
- Imbalance Resolution Alternate
- Invoice Notify Primary
- Invoice Notify Alternate
- Scheduled Qty. Cud Notification
- Critical Notices
- Non-Critical Notices

Buttons: Save, Cancel

## Limited Number of Users/Contacts for Certain Functions

- Certain functions may be assigned to only one user/contact. The check boxes for the user/contact who has currently been assigned those functions will be greyed out and not editable.
- In order to change the user/contact assigned a function, the SA needs to assign that function to a different user/contact. When saved, that function will be removed from the original/contact user, and a pop up box will be displayed notifying the SA of the removal of those roles from the first user.

The screenshot shows the 'Accounts' interface for 'Principal Gas Company' (PR1001). It is divided into two main sections: 'Roles' and 'Contact Types'. In the 'Roles' section, several functions are listed with checkboxes: Capacity Release (checked), Invoicing (unchecked), Market Pooling Aggregator (unchecked), Nominations (checked), Security Administration Report (unchecked), TCPL Marketer Inquiry (unchecked), View Allocation Statements (unchecked), View Contract Summary Report (unchecked), View Imbalance Reports (unchecked), View Interconnect (unchecked), and View Storage Reports (unchecked). There is also a checked box for 'All Contracts?'. In the 'Contact Types' section, the following are listed: Invoice Contact (unchecked), Accounts Payable Primary (checked), Accounts Payable Alternate (checked), Imbalance Resolution Primary (checked), Imbalance Resolution Alternate (checked), Invoice Notify Primary (checked), Invoice Notify Alternate (checked), Scheduled Qty Cut Notification (checked), Critical Notices (checked), and Non-Critical Notices (checked).



## Creating User ID and Password

- If a user is assigned roles and they have no User ID, the SA will be prompted to set and confirm a password for the user.
- This password must be at least 8 characters long, contain at least one numeric digit, and at least one capital letter.
- The password set by the SA is only temporary, the user will be prompted to change the password the first time they log on.
- A User ID will be generated automatically. The User ID will be the user's last name followed by their first initial. If the user name already exists the next letter in their first name will be added to the User ID.
- User IDs and passwords will be synchronized on both the Supply and Empire Business Systems.

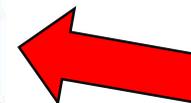
**Function Maintenance**

<b>Business Entity ID</b> 11308	<b>Principal Gas, Inc.</b>	<b>User ID</b> simpsonm
<b>Name:</b> Simpson, Maggie <b>Address:</b> 6363 Main Street <b>Address 2:</b> <b>Address 3:</b> <b>Address 4:</b> <b>Country:</b> USA <b>State:</b> NY <b>City:</b> Williamsville <b>Zip Code:</b> 14221		<b>Work Phone:</b> 716/555-5555 <b>Ext.:</b> <b>Alternate Phone:</b> <b>Ext.:</b> <b>24 Hour Phone:</b> <b>Ext.:</b> <b>Cell Phone:</b> <b>Fax:</b> <b>Pager:</b> <b>Email Address:</b> russm@natfuel.com <b>Alternate Email:</b> <b>IM Address:</b>

[Edit User Info](#)

**Set User Password**

<b>Password:</b>	<input type="text"/>
<b>Confirm Password:</b>	<input type="text"/>



## Unlocking Accounts and Changing Passwords

- Once a user has User ID the SA can change the password.
- If a user tries to log in multiple times with the wrong password, the account will become locked out and the box labeled “Account Locked Out?” will be checked by the system. The SA has the ability to uncheck this box to unlock the account.
- A user’s password will expire if they do not log in for a length of time. The SA has the ability to uncheck this box and make the password active again.

Maintain Users Summary

Business Entity ID 11308 Principal Gas, Inc.

User ID	Locked?	First Name	Last Name	Phone	Ext.	E-mail				1-5 of 5
simpsonm	<input type="checkbox"/>	Maggie	Simpson	716/555-5555		russsm@natfuel.com	<a href="#">Edit User Data</a>	<a href="#">User Functions</a>	<a href="#">Change Pswd</a>	
skinnners	<input type="checkbox"/>	Seymour	Skinner	716/823-2222		russsm@natfuel.com	<a href="#">Edit User Data</a>	<a href="#">User Functions</a>	<a href="#">Change Pswd</a>	

Add User Import User

[Return to Search](#)

Maintain Users | [Summary](#)



Change User Password

User ID **simpsonm** Maggie Simpson

\*New Password:

\*Confirm Password:   Password Expired?

Account Locked Out?

Save Cancel

## Account Level Security Administrators

- By selecting “User Functions” the SA at the business entity level can make a user an SA at the account level

Maintain Users Summary

Business Entity ID 11308 Principal Gas, Inc.

Users										1-5 of 5
User ID	Locked?	First Name	Last Name	Phone	Ext.	E-mail				
simpsonm	<input type="checkbox"/>	Maggie	Simpson	716/555-5555		russsm@natfuel.com	<a href="#">Edit User Data</a>	<a href="#">User Functions</a>	<a href="#">Change Pswd</a>	<a href="#">Remove</a>
simpsonma	<input type="checkbox"/>	Marge	Simpson	827-2393		russsm@natfuel.com	<a href="#">Edit User Data</a>	<a href="#">User Functions</a>	<a href="#">Change Pswd</a>	<a href="#">Remove</a>
skinners	<input type="checkbox"/>	Seymour	Skinner	716/823-2222		russsm@natfuel.com	<a href="#">Edit User Data</a>	<a href="#">User Functions</a>	<a href="#">Change Pswd</a>	<a href="#">Remove</a>

[Add User](#) [Import User](#)

[Return to Search](#)

Maintain Users | [Summary](#)



## SA at Account Level

- Marge Simpson has been set up as the SA for the Principal Gas, Inc. account by the SA at the business entity level.
- She has also been given all of the roles available to her at the account level.
- She has not been given any roles for the Happy Gas, Inc. account.

Function Maintenance

Business Entity ID 11308      Principal Gas, Inc.      User ID simpsonma

Name: Simpson, Marge Address: 6363 Main Street Address 2: Address 3: Address 4: Country: USA State: NY City: Williamsville      Zip Code: 14221	Work Phone: 527-2393      Ext.: Alternate Phone:      Ext.: 24 Hour Phone:      Ext.: Cell Phone: Fax: Pager: Email Address: russm@natfuel.com Alternate Email: IM Address:
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[Edit User Info](#)

Business Entity Roles

- Create/Maintain PDAs
- View O&A Statements
- View Pipeline Allocation Sums

Accounts

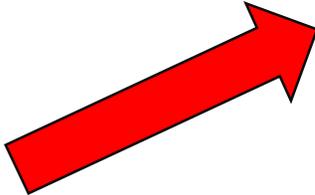
HAP002      Happy Gas, Inc.

<b>Roles</b>	<b>Control Types</b>
<input type="checkbox"/> Capacity Release <input type="checkbox"/> Invoicing <input type="checkbox"/> Market Pooling Aggregator <input type="checkbox"/> Nominations <input type="checkbox"/> Security Administration Report <input type="checkbox"/> Security Administrator (SA) <input type="checkbox"/> TCPL Market Inquiry <input type="checkbox"/> View Allocation Statements <input type="checkbox"/> View Contract Summary Report <input type="checkbox"/> View Imbalance Reports <input type="checkbox"/> View Interconnect <input type="checkbox"/> View Storage Reports	<input type="checkbox"/> Invoice Contact <input type="checkbox"/> Accounts Payable Primary <input type="checkbox"/> Accounts Payable Alternate <input type="checkbox"/> Imbalance Resolution Primary <input type="checkbox"/> Imbalance Resolution Alternate <input type="checkbox"/> Invoice Notify Primary <input type="checkbox"/> Invoice Notify Alternate <input type="checkbox"/> Scheduled Qty Cut Notification <input type="checkbox"/> Critical Notices <input type="checkbox"/> Non-Critical Notices

PR1002      Principal Gas, Inc.

<b>Roles</b>	<b>Control Types</b>
<input checked="" type="checkbox"/> Capacity Release <input checked="" type="checkbox"/> Invoicing <input checked="" type="checkbox"/> Market Pooling Aggregator <input checked="" type="checkbox"/> Nominations <input checked="" type="checkbox"/> All Contracts? <input checked="" type="checkbox"/> Security Administration Report <input checked="" type="checkbox"/> Security Administrator (SA) <input checked="" type="checkbox"/> TCPL Market Inquiry <input checked="" type="checkbox"/> View Allocation Statements <input checked="" type="checkbox"/> View Contract Summary Report <input checked="" type="checkbox"/> View Imbalance Reports <input checked="" type="checkbox"/> View Interconnect <input checked="" type="checkbox"/> View Storage Reports	<input checked="" type="checkbox"/> Invoice Contact <input checked="" type="checkbox"/> Accounts Payable Primary <input checked="" type="checkbox"/> Accounts Payable Alternate <input checked="" type="checkbox"/> Imbalance Resolution Primary <input checked="" type="checkbox"/> Imbalance Resolution Alternate <input checked="" type="checkbox"/> Invoice Notify Primary <input checked="" type="checkbox"/> Invoice Notify Alternate <input checked="" type="checkbox"/> Scheduled Qty Cut Notification <input checked="" type="checkbox"/> Critical Notices <input checked="" type="checkbox"/> Non-Critical Notices



## SA at the Account Level

- When Marge logs in and looks at her user functions, she will only see options for Principal Gas, Inc.

Function Maintenance	
Business Entity ID <b>11308</b>	Principal Gas, Inc. <span style="float: right;">User ID <b>simpsonma</b></span>
<b>Name:</b> Simpson,Marge <b>Address:</b> 6363 Main Street <b>Address 2:</b> <b>Address 3:</b> <b>Address 4:</b> <b>Country:</b> USA <b>State:</b> NY <b>City:</b> Williamsville <span style="float: right;"><b>Zip Code:</b> 14221</span>	<b>Work Phone:</b> 827-2393 <b>Ext.:</b> <b>Alternate Phone:</b> <b>Ext.:</b> <b>24 Hour Phone:</b> <b>Ext.:</b> <b>Cell Phone:</b> <b>Fax:</b> <b>Pager:</b> <b>Email Address:</b> russm@natfuel.com <b>Alternate Email:</b> <b>IM Address:</b>
<a href="#">Edit User Info</a>	
Accounts	
PRI002	Principal Gas, Inc.
<b>Roles</b> <input checked="" type="checkbox"/> Capacity Release <input checked="" type="checkbox"/> Invoicing <input checked="" type="checkbox"/> Market Pooling Aggregator <input checked="" type="checkbox"/> Nominations <span style="float: right;"><input checked="" type="checkbox"/> All Contracts?</span> <input checked="" type="checkbox"/> Security Administration Report <input checked="" type="checkbox"/> Security Administrator (SA) <input checked="" type="checkbox"/> TCPL Marketer Inquiry <input checked="" type="checkbox"/> View Allocation Statements <input checked="" type="checkbox"/> View Contract Summary Report <input checked="" type="checkbox"/> View Imbalance Reports <input checked="" type="checkbox"/> View Interconnect <input checked="" type="checkbox"/> View Storage Reports	<b>Contact Types</b> <input checked="" type="checkbox"/> Invoice Contact <input checked="" type="checkbox"/> Accounts Payable Primary <input checked="" type="checkbox"/> Accounts Payable Alternate <input checked="" type="checkbox"/> Imbalance Resolution Primary <input checked="" type="checkbox"/> Imbalance Resolution Alternate <input checked="" type="checkbox"/> Invoice Notify Primary <input checked="" type="checkbox"/> Invoice Notify Alternate <input checked="" type="checkbox"/> Scheduled Qty Cut Notification <input checked="" type="checkbox"/> Critical Notices <input checked="" type="checkbox"/> Non-Critical Notices
<input type="button" value="Save"/>	<input type="button" value="Cancel"/>

## Managing Multiple Users Across Multiple Accounts

- To continue our example, Samuel Skinner the SA at the business entity level has now set up Marge Simpson as the SA at the account level for Principal Gas, Inc. and Pharrell Williams as the SA at the account level for Happy Gas, Inc. Marge is able to add Maggie Simpson for the Principal Gas, Inc. account, while Pharrell is able to add Robin Thicke for the Happy Gas, Inc. Account.
- If Samuel Skinner was the SA at the business entity level for any other business entity (for instance the business entity on Supply and Empire) he could use the “Import User” option at the bottom of the list to add users from one business entity to the other.

Maintain Users | Summary

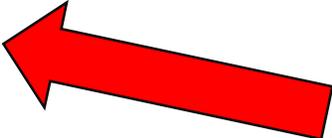
Business Entity ID 11308      Principal Gas, Inc.

Users										1-5 of 5
User ID	Locked?	First Name	Last Name	Phone	Ext.	E-mail				
simpsonm	<input type="checkbox"/>	Maggie	Simpson	716/555-5555		russm@natfuel.com	<a href="#">Edit User Data</a>	<a href="#">User Functions</a>	<a href="#">Change Pswd</a>	<a href="#">Remove</a>
simpsonma	<input type="checkbox"/>	Marge	Simpson	827-2393		russm@natfuel.com	<a href="#">Edit User Data</a>	<a href="#">User Functions</a>	<a href="#">Change Pswd</a>	<a href="#">Remove</a>
skinners	<input type="checkbox"/>	Seymour	Skinner	716/823-2222		russm@natfuel.com	<a href="#">Edit User Data</a>	<a href="#">User Functions</a>	<a href="#">Change Pswd</a>	
thicker	<input type="checkbox"/>	Robin	Thicke	555/555-5555		Heyheyhey@happygas.com	<a href="#">Edit User Data</a>	<a href="#">User Functions</a>	<a href="#">Change Pswd</a>	<a href="#">Remove</a>
williamsp	<input type="checkbox"/>	Pharrell	Williams	555-5555		russm@natfuel.com	<a href="#">Edit User Data</a>	<a href="#">User Functions</a>	<a href="#">Change Pswd</a>	<a href="#">Remove</a>

[Add User](#)      [Import User](#)

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## Users and Agency Agreements

- As the SA for Principal Gas, Inc. Samuel Skinner can enter into an agency agreement with Agent Services, LLC (see training on agency agreement for more details). These agreements only allow Skinner to assign certain functions to that agent business entity or account. The agent entity's SA will be responsible to assign users to those functions.
- In this example Jerry Maguire is the SA for Agent Services, LLC and he has entered an agency agreement with Principal Gas, Inc. to nominate on their contract B12320-358271.

**Agency Agreement Maintenance**

Agreement ID: 10028	Status: Approved	Terminate
Principal Account ID: PRI002	Principal Gas, Inc.	
Agent Account ID: AGE004	Agent Services, LLC	
Comments:	<input type="text"/>	Print Agreement

Function Name	All Contracts?	Contract ID
Nominations	<input type="checkbox"/>	B12320-358271

Return

## Agent SA's Can Assign Functions to Their Users.

Jerry Maguire as the SA of Agent Services, LLC can now assign roles to his own employees for both his own accounts, and accounts that were assigned via an agency agreement. In this example he gives James Bond nomination rights on all contracts held by Agent Services, LLC, and also the Contract held by Principal Gas, Inc.

The screenshot displays a 'Function Maintenance' interface with the following sections:

- Business Entity ID 11309 Agent Services, LLC**
  - User ID bondj**
  - Name:** Bond, James
  - Address:** 123 Main Street
  - Address 2:**
  - Address 3:**
  - Address 4:**
  - Country:** USA
  - State:** NY
  - City:** Williamsville
  - Zip Code:** 14221
  - [Edit User Info](#)
  - Work Phone:** 007/007-1007 **Ext.:**
  - Alternate Phone:** **Ext.:**
  - 24 Hour Phone:** **Ext.:**
  - Cell Phone:**
  - Fax:**
  - Pager:**
  - Email Address:** mrusshome@gmail.com
  - Alternate Email:**
  - IM Address:**
- Business Entity Roles**
  - [Create/Maintain PDAs](#)
  - [Security Administrator \(SA\)](#)
  - [TCPL Marketer Inquiry](#)
  - [View OBA Statements](#)
  - [View Pipeline Allocation Stmtns](#)
- Accounts**
  - AGE004 Agent Services, LLC**
    - Roles**
      - [Capacity Release](#)
      - [Invoicing](#)
      - [Market Pooling Aggregator](#)
      - [Nominations](#)  [All Contracts?](#)
      - [Security Administration Report](#)
      - [Security Administrator \(SA\)](#)
      - [TCPL Marketer Inquiry](#)
      - [View Allocation Statements](#)
      - [View Contract Summary Report](#)
      - [View Imbalance Reports](#)
      - [View Interconnect](#)
      - [View Storage Reports](#)
    - Contact Types**
      - [Invoice Contact](#)
      - [Accounts Payable Primary](#)
      - [Accounts Payable Alternate](#)
      - [Imbalance Resolution Primary](#)
      - [Imbalance Resolution Alternate](#)
      - [Invoice Notify Primary](#)
      - [Invoice Notify Alternate](#)
      - [Scheduled Qty Cut Notification](#)
      - [Critical Notices](#)
      - [Non-Critical Notices](#)
  - PRI002 Principal Gas, Inc.**  [Via Agency Agreement](#) 10028
    - Roles**
      - [Nominations](#)
    - Contract ID:** B12320-356271

# User Assigned Roles For Multiple Accounts

James Bond, who works for Agent Services, LLC has been assigned the role of nominations for both Agent Services, LLC and for Principal Gas, Inc., and can nominate on multiple contracts.

**Nominations - Form**

Change to NFGSC      Nominations - Grid      Refresh

TSP Name: **Empire Pipeline, Inc. - ST**  
 TSP: **609775049**  
 Svc Req Name:  
 Svc Req:  
 \*Svc Req K:

**Date**  
 \*Beg Date: 01/17/2018  
 \*Beg Time: 09:00 T  
 \*End Date: 02/01/2018  
 \*End Time: 09:00:00

**Receipt**  
 \*Rec Loc:  
 Rec Loc Name:  
 Up K:  
 Up ID:  
 Rec Qty: 0  
 Rec Rank: 0

**Delivery**  
 \*Del Loc:  
 Loc Name:  
 Dn K:  
 Dn ID:  
 Del Qty: 0  
 Del Rank: 0

**Look Up Svc Req K**

Cancel

**Search Results**

Svc Req K	Svc Req Name
B12320-358271	Principal Gas, Inc.
B12324-358461	Agent Services, LLC

**Show Nominations For Flow Date:**  
 Date: 01/17/2018    Beg Time: ALL

**Totals For Flow Date Selected:**

	Nominated	Effective	Scheduled
Receipt	0	0	0
Delivery	0	0	0

**Nominations for Selection**

Sel	Del	Copy	Activity	Beg Date	Beg Time	End Date	Rec Loc	Up K	Up ID	Del Loc	Dn K	Dn ID	Plg ID
<a href="#">Sel</a>	<a href="#">Del</a>	<a href="#">Copy</a>											

# Roles Can Be Restricted To Select Accounts

Maxwell Smart who works for Agent Services, LLC but has been assigned the role of nominations only for Principal Gas, Inc., will be limited to working only on Principal Gas, Inc.'s contract.

The screenshot displays a 'Function Maintenance' window for 'Agent Services, LLC' with 'User ID smartm'. It shows user details, 'Business Entity Roles' (with 'Nominations' selected), and 'Accounts' for 'Agent Services, LLC' and 'Principal Gas, Inc.'. A red arrow points to the 'Nominations' role under 'Agent Services, LLC'. Another red arrow points to the 'Nominations' role under 'Principal Gas, Inc.', which is restricted to a specific contract ID 'B12320-358271'. A 'Look Up Svc Req K' dialog box is open, showing search results for 'B12320-358271 Principal Gas, Inc.'.

# User Summary

An SA can review user rights of both employees and agents via the “Summary” tab on the “Maintain Users” page.



Maintain Users Summary

Business Entity ID 11333 Principal Gas, Inc.

User ID	Locked?	Name	Phone	Ext.	E-mail				
simpsonm	<input type="checkbox"/>	Simpson, Maggie	716/555-5555		russsm@natfuel.com	<a href="#">Edit User Data</a>	<a href="#">User Functions</a>	<a href="#">Change Pswd/Unlock</a>	<a href="#">Remove</a>
simpsonma	<input type="checkbox"/>	Simpson, Marge	716/827-2393		russsm@natfuel.com	<a href="#">Edit User Data</a>	<a href="#">User Functions</a>	<a href="#">Change Pswd/Unlock</a>	<a href="#">Remove</a>
skinners	<input type="checkbox"/>	Skinner, Seymour	716/857-7777		russsm@natfuel.com	<a href="#">Edit User Data</a>	<a href="#">User Functions</a>	<a href="#">Change Pswd/Unlock</a>	

[Add User](#) [Import User](#)

[Return to Search](#)

Maintain Users | [Summary](#)

## Users for Both Principal and Agent

The SA for Principal Gas, Inc. can not control the individual users assigned by the agent company to work on their contracts, however they can see those users on this summary screen. Users who have been assigned rights via an agency agreement will have “(agent)” after their name.

Maintain Users	Summary
Business Entity ID: 11333      Principal Gas, Inc.	
<b>Business Entities</b>	
11333      Principal Gas, Inc.	
<b>Roles</b>	
<u>Confirmations</u>	
<u>Security Administrator (SA)</u> Simpson, Maggie Skinner, Seymour	
<u>TCPL Marketer Inquiry</u>	
<u>View OBA Statements</u>	
<u>View Pipeline Allocation Stmt</u> s Simpson, Maggie	
<b>Accounts</b>	
PRI001      Principal Gas, Inc.	
<b>Roles</b>	<b>Contact Types</b>
<u>Capacity Release</u> Simpson, Maggie	<u>Invoice Contact</u> Maguire, Jerry (Agent) Simpson, Maggie
<u>Market Pooling Aggregator</u>	<u>Accounts Payable Primary</u> Skinner, Seymour
<u>Nominations</u> Bond, James (Agent) Simpson, Maggie Smart, Maxwell (Agent)	<u>Accounts Payable Alternate</u> Simpson, Maggie
<u>Security Administration Report</u> Simpson, Maggie	<u>Imbalance Resolution Primary</u> Simpson, Maggie
<u>Security Administrator (SA)</u> Simpson, Maggie	<u>Imbalance Resolution Alternate</u> Simpson, Maggie
<u>View Allocation Statements</u>	<u>Invoice Notify Primary</u> Maguire, Jerry (Agent) Simpson, Maggie
<u>View Contract Summary</u> Simpson, Maggie	<u>Invoice Notify Alternate</u> Simpson, Maggie
<u>View Imbalance Reports</u> Simpson, Maggie	<u>Scheduled Qty Cut Notification</u> Simpson, Maggie
<u>View Interconnect</u> Bond, James (Agent)	<u>Critical Notices</u> Simpson, Maggie Skinner, Seymour
<u>View Invoices</u> Simpson, Maggie Simpson, Maggie	<u>Non-Critical Notices</u> Simpson, Maggie
<u>View Storage Reports</u>	

## Conclusions

- An SA can assign different tasks for multiple accounts. Users need only one user ID. Roles and contact types will be assigned to an employee or to an agent through the agency process.
- Agency agreements can be executed and terminated with no need for National Fuel employees to be involved. The rights assigned through an agency agreement will be removed when the agreement is terminated.
- User passwords can be managed internally by the with no involvement from National Fuel employees.
- For any additional questions or assistance, please contact:
  - [NFGSCscheduling@natfuel.com](mailto:NFGSCscheduling@natfuel.com)
  - 716-857-6960