



national fuel[®]

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

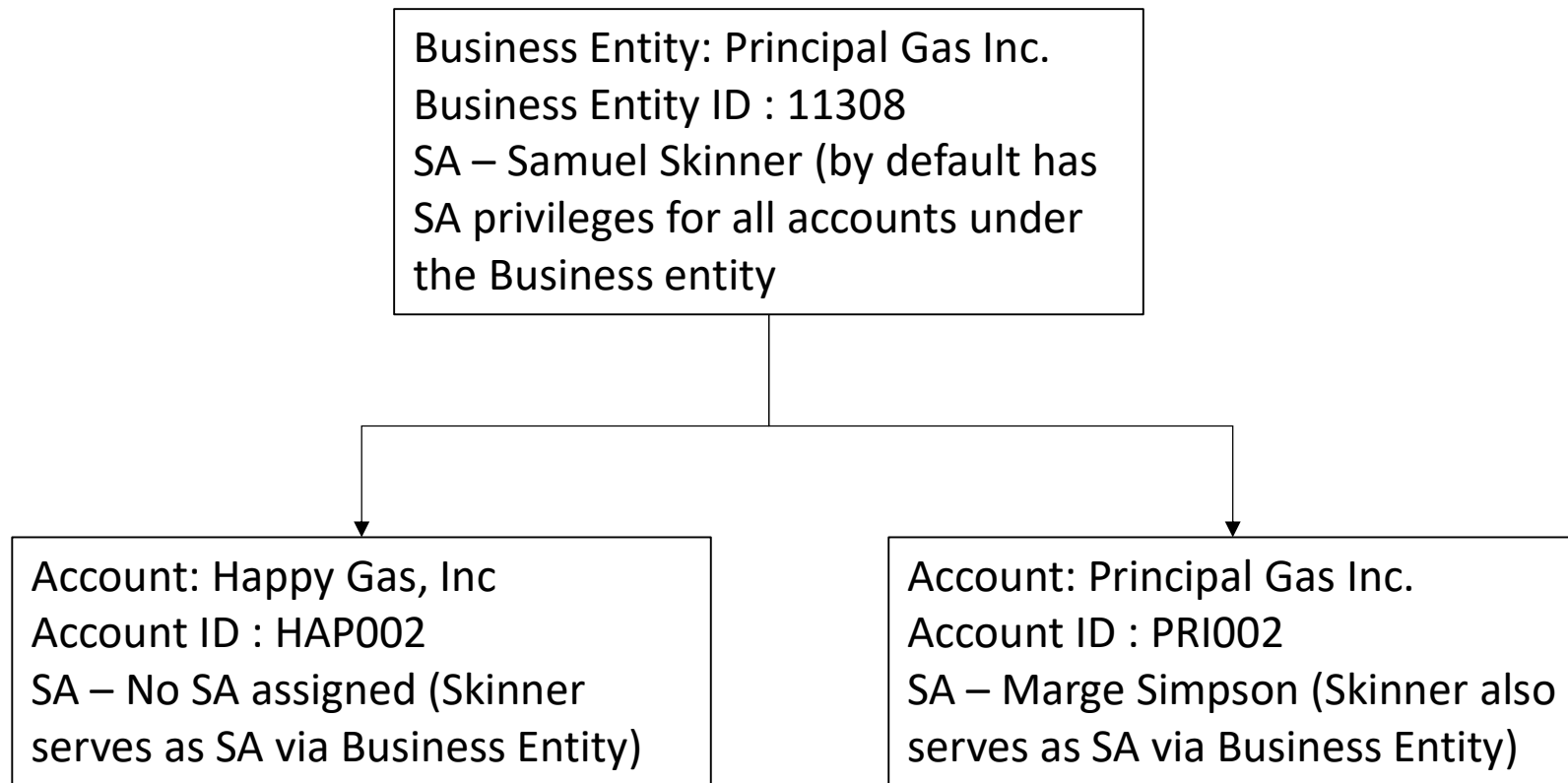
Introduction of the Security Administrator (SA)

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.”



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**

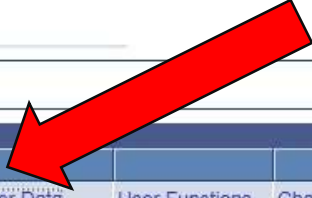
Business Entity ID **11308** **Principal Gas, Inc.**

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

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

[Return to Search](#)

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



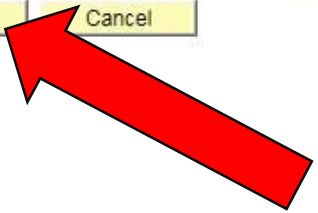
Required Information

- 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 **skidders**

<p>Name: Skinner, Seymour</p> <p>*First Name: <input type="text" value="Seymour"/> x</p> <p>Middle Name: <input type="text"/></p> <p>*Last Name: <input type="text" value="Skinner"/></p> <p>Title: <input type="text"/> Suffix: <input type="text"/></p> <p>*Address 1: <input type="text" value="123 mile road"/></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"/> 🔍</p> <p>*State: <input type="text" value="NY"/> 🔍</p> <p>*City: <input type="text" value="main"/> *Zip Code: <input type="text" value="14221"/></p>	<p>Work Phone: <input type="text" value="716/823-2222"/> 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" value="russm@natfuel.com"/></p> <p>Alt. Email: <input type="text"/></p> <p>IM Address: <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		
skinnners	<input type="checkbox"/>	Seymour	Skinner	716/823-2222		russsm@natfuel.com	Edit User Data	User Functions Change Pswd



Add User

Import User

[Return to Search](#)

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

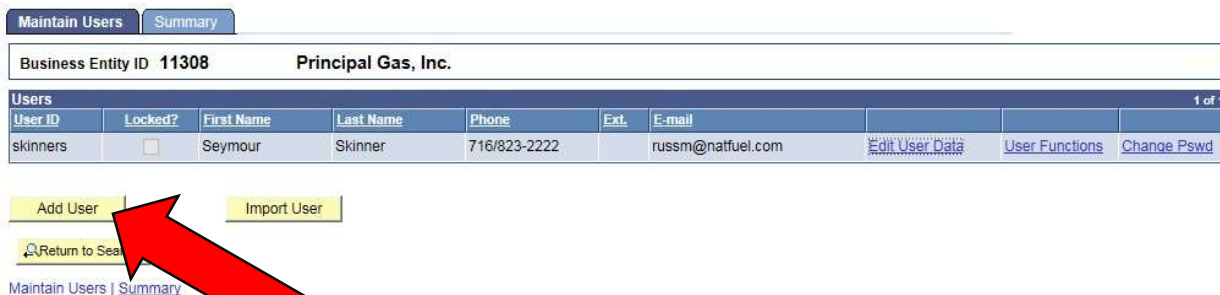
Business Entity and Account Functions

- 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					
Name: Skinner, Seymour Address: 123 mile road Address 2: Address 3: Address 4: Country: USA State: NY City: main Zip Code: 14221		Work Phone: 716/823-2222 Ext.: Alternate Phone: Ext.: 24 Hour Phone: Ext.: Cell Phone: Fax: Pager: Email Address: russm@nattuel.com Alternate Email: IM Address:					
Edit User Info							
Business Entity Roles <ul style="list-style-type: none"> <input type="checkbox"/> Create/Maintain PDAs <input checked="" type="checkbox"/> Security Administrator (SA) <input type="checkbox"/> TCPL Marketer Inquiry <input type="checkbox"/> View OBA Statements <input type="checkbox"/> View Pipeline Allocation Strmts 							
Accounts <table border="1"> <thead> <tr> <th>HAP002</th> <th>Happy Gas, Inc.</th> </tr> </thead> <tbody> <tr> <td colspan="2"> Roles <ul style="list-style-type: none"> <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"/> TCPL Marketer 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 </td> <td> Contact Types <ul style="list-style-type: none"> <input type="checkbox"/> Accounts Payable Alternate <input checked="" type="checkbox"/> Accounts Payable Primary <input type="checkbox"/> Critical Notices <input checked="" type="checkbox"/> Imbalance Resolution Primary <input type="checkbox"/> Imbalance Resolution Alternate <input type="checkbox"/> Invoice Notify Alternate <input type="checkbox"/> Invoice Contact <input checked="" type="checkbox"/> Invoice Notify Primary <input type="checkbox"/> Non-Critical Notices <input type="checkbox"/> Scheduled Qty Cut Notification </td> </tr> </tbody> </table>			HAP002	Happy Gas, Inc.	Roles <ul style="list-style-type: none"> <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"/> TCPL Marketer 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 		Contact Types <ul style="list-style-type: none"> <input type="checkbox"/> Accounts Payable Alternate <input checked="" type="checkbox"/> Accounts Payable Primary <input type="checkbox"/> Critical Notices <input checked="" type="checkbox"/> Imbalance Resolution Primary <input type="checkbox"/> Imbalance Resolution Alternate <input type="checkbox"/> Invoice Notify Alternate <input type="checkbox"/> Invoice Contact <input checked="" type="checkbox"/> Invoice Notify Primary <input type="checkbox"/> Non-Critical Notices <input type="checkbox"/> Scheduled Qty Cut Notification
HAP002	Happy Gas, Inc.						
Roles <ul style="list-style-type: none"> <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"/> TCPL Marketer 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 		Contact Types <ul style="list-style-type: none"> <input type="checkbox"/> Accounts Payable Alternate <input checked="" type="checkbox"/> Accounts Payable Primary <input type="checkbox"/> Critical Notices <input checked="" type="checkbox"/> Imbalance Resolution Primary <input type="checkbox"/> Imbalance Resolution Alternate <input type="checkbox"/> Invoice Notify Alternate <input type="checkbox"/> Invoice Contact <input checked="" type="checkbox"/> Invoice Notify Primary <input type="checkbox"/> Non-Critical Notices <input type="checkbox"/> Scheduled Qty Cut Notification 					
PR002 Principal Gas, Inc.							
Roles <ul style="list-style-type: none"> <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"/> TCPL Marketer 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 		Contact Types <ul style="list-style-type: none"> <input type="checkbox"/> Accounts Payable Alternate <input checked="" type="checkbox"/> Accounts Payable Primary <input type="checkbox"/> Critical Notices <input checked="" type="checkbox"/> Imbalance Resolution Primary <input type="checkbox"/> Imbalance Resolution Alternate <input type="checkbox"/> Invoice Notify Alternate <input type="checkbox"/> Invoice Contact <input checked="" type="checkbox"/> Invoice Notify Primary <input type="checkbox"/> Non-Critical Notices <input type="checkbox"/> Scheduled Qty Cut Notification 					
<div>Save Cancel</div>							

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 displays the 'Maintain Users' interface for 'Principal Gas, Inc.' (Business Entity ID 11308). It features a table of users and buttons for adding or importing users. A red arrow points to the 'Add User' button.

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		russsm@natfuel.com	Edit User Data	User Functions	Change Pswd

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

[Return to Search](#)

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

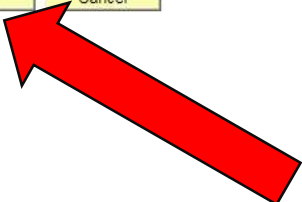
Adding Users

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	Edit User Data	User Functions
skinner	<input type="checkbox"/>	Seymour	Skinner	716/823-2222		russm@natfuel.com	Edit User Data	User Functions Change Pswd

[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' window for 'Principal Gas, Inc.' with User ID 'simpsonm'. The window is divided into several sections:

- Business Entity Info:**
 - Name: Simpson, Maggie
 - Address: 6363 Main Street
 - Address 2:
 - Address 3:
 - Address 4:
 - Country: USA
 - State: NY
 - City: Williamsville
 - Zip Code: 14221
- Contact Info:**
 - Work Phone: 716-555-5555
 - Alternate Phone:
 - 24 Hour Phone:
 - Cell Phone:
 - Fax:
 - Pager:
 - Email Address: russm@natfuel.com
 - Alternate Email:
 - IM Address:
- 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 Pooling 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. Cut Notification
 - ☐ Critical Notices
 - ☐ Non-Critical Notices
 - PR002 - Principal Gas, Inc.**
 - Roles:**
 - ☒ Capacity Release
 - ☐ Invoicing
 - ☐ Market Pooling 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
 - ☒ All Contracts?
 - 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
- Buttons:**
 -
 -

A red arrow points to the 'Save' button.

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 a software window titled 'Accounts' for 'Principal Gas Company' with user ID 'PRI001'. It contains two main sections: 'Roles' and 'Contact Types'. In the 'Roles' section, 'Capacity Release' and 'Nominations' are checked, while 'All Contracts?' is also checked. Other roles like 'Invoicing', 'Market Pooling Aggregator', 'Security Administration Report', 'TCPL Marketer Inquiry', 'View Allocation Statements', 'View Contract Summary Report', 'View Imbalance Reports', 'View Interconnect', and 'View Storage Reports' are unchecked. In the 'Contact Types' section, 'Invoice Contact' is unchecked, while 'Accounts Payable Primary', 'Accounts Payable Alternate', 'Imbalance Resolution Primary', 'Imbalance Resolution Alternate', 'Invoice Notify Primary', 'Invoice Notify Alternate', 'Scheduled Qty Cut Notification', 'Critical Notices', and 'Non-Critical Notices' are all checked.

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



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

Business Entity ID 11308	Principal Gas, Inc.	User ID simpsonm
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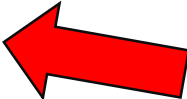
Name: Simpson,Maggie
Address: 6363 Main Street
Address 2:
Address 3:
Address 4:
Country: USA
State: NY
City: Williamsville **Zip Code:** 14221

[Edit User Info](#)

Work Phone: 716/555-5555 **Ext.:**
Alternate Phone: **Ext.:**
24 Hour Phone: **Ext.:**
Cell Phone:
Fax:
Pager:

Email Address: russm@natfuel.com
Alternate Email:
IM Address:

Set User Password
Password:
Confirm Password:



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	Edit User Data	User Functions	Change Pswd	
skinnerr	<input type="checkbox"/>	Seymour	Skinner	716/823-2222		russsm@natfuel.com	Edit User Data	User Functions	Change Pswd	

[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	Edit User Data	User Functions	Change Pswd	Remove
simpsonma	<input type="checkbox"/>	Marge	Simpson	827-2393		russsm@natfuel.com	Edit User Data	User Functions	Change Pswd	Remove
skinners	<input type="checkbox"/>	Seymour	Skinner	716/823-2222		russsm@natfuel.com	Edit User Data	User Functions	Change Pswd	Remove

[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: 827-2393 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 POAs
☐ View O&A Statements
☒ View Pipeline Allocation Summary

Accounts

HAP002 Happy Gas, Inc.

Roles <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 Interconnected <input type="checkbox"/> View Storage Reports	Control Types <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
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PR1002 Principal Gas, Inc.

Roles <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 Interconnected <input checked="" type="checkbox"/> View Storage Reports	Control Types <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
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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 11308	Principal Gas, Inc.	User ID simpsonma
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Name: Simpson,Marge Address: 6363 Main Street Address 2: Address 3: Address 4: Country: USA State: NY City: Williamsville Zip Code: 14221	Work Phone: 827-2393 Alternate Phone: 24 Hour Phone: Cell Phone: Fax: Pager: Email Address: russm@nattfuel.com Alternate Email: IM Address:
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[Edit User Info](#)

Accounts

PRI002	Principal Gas, Inc.
--------	---------------------

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

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.

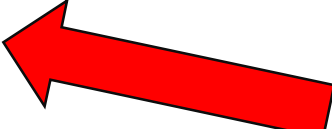
Users 1-5 of 5									
User ID	Locked?	First Name	Last Name	Phone	Ext.	E-mail			
simpsonm	<input type="checkbox"/>	Maggie	Simpson	716/555-5555		rusism@natfuel.com	Edit User Data	User Functions	Change Pswd Remove
simpsonma	<input type="checkbox"/>	Marge	Simpson	827-2393		rusism@natfuel.com	Edit User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

Add User

Import User

Return to Search

Maintain Users | [Summary](#)



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
Principal Account ID: PRI002

Status: Approved
Principal Gas, Inc.

Agent Account ID: AGE004
Agent Services, LLC

Comments:

Terminate

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 the 'Function Maintenance' interface. At the top, it shows 'Business Entity ID 11309', 'Agent Services, LLC', and 'User ID bondj'. Below this, there are two main sections: 'Business Entity Roles' and 'Accounts'.

Business Entity Roles: This section contains a list of roles with checkboxes. The roles are: Create/Maintain PDAs, Security Administrator (SA), TCPL Marketer Inquiry, View OBA Statements, and View Pipeline Allocation Stmtns. The 'Security Administrator (SA)' role is selected.

Accounts: This section is divided into two parts: 'Roles' and 'Contact Types'.

Roles: This part contains a list of roles with checkboxes. The roles are: Capacity Release, Invoicing, Market Pooling Aggregator, Nominations, Security Administration Report, Security Administrator (SA), TCPL Marketer Inquiry, View Allocation Statements, View Contract Summary Report, View Imbalance Reports, View Interconnect, and View Storage Reports. The 'Nominations' role is selected, and the 'All Contracts?' checkbox is also checked.

Contact Types: This part contains a list of contact types with checkboxes. The contact types are: 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, and Non-Critical Notices. The 'Invoice Contact', 'Accounts Payable Alternate', 'Imbalance Resolution Alternate', 'Invoice Notify Alternate', 'Scheduled Qty Cut Notification', 'Critical Notices', and 'Non-Critical Notices' are all selected.

Principal Gas, Inc.: At the bottom, there is a section for 'Principal Gas, Inc.' with a checkbox for 'Via Agency Agreement' which is checked. Below this, there is a 'Roles' section with a list of roles. The 'Nominations' role is selected. To the right of the roles list, there is a 'Contract ID' field with the value 'B12320-358271'.

Two red arrows point to the 'Nominations' role in the 'Roles' section of the 'Accounts' part and the 'Contract ID' field.

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.

The screenshot displays the 'Nominations - Form' interface. At the top, there are links for 'Change to NFGSC', 'Nominations - Grid', and 'Refresh'. The form fields include:

- TSP Name: Empire Pipeline, Inc. - ST
- TSP: 609775049
- Svc Req Name:
- Svc Req:
- *Svc Req K: (with a search icon)

Below these are sections for 'Date', 'Receipt', and 'Delivery' with various input fields for dates, times, and IDs. A 'Look Up Svc Req K' dialog box is open, showing search results:

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

At the bottom, there is a 'Show Nominations For Flow Date' section with a date and time filter, and a 'Totals For Flow Date Selected' table:

	Nominated	Effective	Scheduled
Receipt	0	0	0
Delivery	0	0	0

The bottom of the form features a 'Nominations for Selection' table with columns for selection, deletion, copy, activity, and various nomination details.

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 software interface for managing user roles and accounts. The main window is titled "Function Maintenance" and shows details for "Agent Services, LLC" (Business Entity ID 11309) and user "smartm".

Business Entity Roles:

- ☐ Create/Maintain PDAs
- ☐ Security Administrator (SA)
- ☐ TCPL Marketer Inquiry
- ☐ View OBA Statements
- ☐ View Pipeline Allocation Strms

Accounts:

AGE004 Agent Services, LLC

Roles:

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

Contract Type:

- ☐ Invoice
- ☐ Account
- ☐ Account
- ☐ Imbalance
- ☐ Imbalance resolution Alternate
- ☐ Invoice Notify Primary
- ☐ Invoice Notify Alternate
- ☐ Scheduled Qty Cut Notification
- ☐ Critical Notices
- ☐ Non-Critical Notices

PR1002 Principal Gas, Inc.

☒ Via Agency Agreement 10028

Roles:

- ☒ Nominations

***Contract ID:** B12320-358271

Buttons: Save, Cancel

Look Up Svc Req K

Search Results

Svc Req K	Svc Req Name
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.**

Users									1-3 of 3
User ID	Locked?	Name	Phone	Ext.	E-mail				
simpsonm	<input type="checkbox"/>	Simpson, Maggie	716/555-5555		russsm@natfuel.com	Edit User Data	User Functions	Change Pswd/Unlock	Remove
simpsonma	<input type="checkbox"/>	Simpson, Marge	716/827-2393		russsm@natfuel.com	Edit User Data	User Functions	Change Pswd/Unlock	Remove
skinnners	<input type="checkbox"/>	Skinner, Seymour	716/857-7777		russsm@natfuel.com	Edit User Data	User Functions	Change Pswd/Unlock	

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

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
 - 716-857-6960