Security Administrator (SA) Training
Training Topics

- Introduction to Security Administration
- How to navigate to the Security Administration menu
- How to add and maintain user contact information
- How to assign and maintain roles for user accounts
- How to reset passwords/unlock user accounts
Introduction to Security Administration
Introduction to Security Administration

- Each company doing business with National Fuel’s Gas Measurement department is assigned an entity number when their account is created within the GM-LP Accounting System (GM-LP). These accounts are unique to each company’s legal operating name.

- GM-LP allows for company accounts to be placed into production groups so that a single Security Administrator (SA) may monitor multiple companies’ information and users. This functionality is particularly useful for parent and subsidiary company affiliations.

- An SA may be assigned at the production group level or the individual account level within GM-LP.

- SAs have been designated by each company with an account in GM-LP via the Security Administrator Request Form that was sent out beginning in November 2017.

- Changes to SAs must be made by contacting a member of the National Fuel Gas Measurement department and requesting a new Security Administrator Request Form.
  - This form will allow current SAs to be removed and new SAs to be added.
  - SA changes will be processed by the National Fuel Information Services department.

- Designated SAs have the ability to perform the following functions through their web based access to GM-LP:
  - Add and maintain user contact information
  - Assign and maintain roles for user accounts
  - Reset passwords/unlock user accounts
  - Create and execute agency agreements (separate training materials provided)
How to navigate to the Security Administration menu
Security Administration Menu

This will be the home screen that appears after you log-in to GM-LP:

Select Measurement Activities to expand the menu option

Once you have expanded the Measurement Activities menu the following options will be displayed:

Select Security Administration to expand the menu option

Once you have expanded the Security Administration menu the following options will be displayed:

All blue text represents a link that can be used for navigation
How to add and maintain user contact information
How to add users

To add users select *Maintain Users* from the *Security Administration* menu.

Select *Maintain Users* to expand the menu option.

Once you have expanded the *Maintain Users* menu all current users will be displayed along with the ‘Add User’ option:

Select ‘Add User’
How to add users

Once you have selected the ‘Add User’ option the following Contact Maintenance screen will be displayed:

Input data for the new contact into the applicable fields.

Note that fields denoted with an (*) are required.

Select ‘Save’ to keep inputs or ‘Cancel’ to discard. Both options will direct you back to the Maintain Users menu.
How to maintain user contact information

The following is the **Maintain Users** menu which will display all contacts assigned to a production group/individual account:

To maintain user contact information select the ‘**Edit User Data**’ link next to the applicable user you wish to make changes for. This link will open the Contact Maintenance screen (as seen in the previous slide) allowing changes to be made to the users contact information.

Note: User IDs are created automatically by the system when roles are assigned to users. Assigning roles will be covered later in the training.
How to assign and maintain roles for user accounts
How to assign and maintain roles for user accounts

The following is the **Maintain Users** menu which will display all contacts assigned to a production group/individual account:

Note: A designated SA has the ability to assign or change roles for all users assigned to a production group/individual account. For purposes of this training, the designated SA is Fred Jones.

To assign or change roles select the ‘**User Functions**’ link next to the applicable user you wish to view roles for. This link will open the **Function Maintenance** screen allowing roles to be assigned or changed.
How to assign and maintain roles for user accounts

The following is the **Functional Maintenance** screen which will display all roles available to be assigned for a selected user:

This area will always display the individual account and roles that may be assigned for the user. If more than one account is within the Production Group each will be displayed. This provides the option to assign roles based on an account by account basis but allows the SA to maintain all roles for a user within a single screen.

Remember only National Fuel's Information Services department may activate an SA after the completion of a Security Administrator Request Form.

This area displays all roles that are available to be assigned to the selected user.
How to assign and maintain roles for user accounts

The following is the **Functional Maintenance** screen which will display all roles available to be assigned for a selected user:

For a brief description of the functionality associated with each of the roles simply hover your cursor over the role.

In addition to roles being assigned for the selected user, contact types may also be assigned using this screen.

Each contact type has a primary and an alternate listed. Only **one** primary may be listed for each contact type per account. If there is only one user assigned to an account, they will be the designated SA and will automatically be assigned the primary for all contact types.

Note: If an SA has been automatically assigned as a primary contact type but does not wish to be the primary contact they **must** add a new user to the account and change the contact type to the new user.
How to assign and maintain roles for user accounts

The following is a section of the **Functional Maintenance** screen which will display all roles available to be assigned for a selected user:

As roles are assigned to a user for the first time, the system will recognize that a user ID must be created and the ‘Set User Password’ option will appear.

The initial password will be set by the SA and later changed by the user after their initial log-in. Passwords are required to be 8 characters in length and must contain 1 uppercase letter, 1 lowercase letter, and 1 number.

Note: The roles ‘Enter Readings and/or Volumes’ and ‘View Readings and/or Volumes’ will prompt an additional selection for all meters or specific meters. This option provides an additional layer of security for the account by allowing the SA to restrict access by meter. See the next slide for instruction on how to assign roles for a specific meter.

To assign roles or contact types for a user, simply select the box next to the desired option. A checkmark will appear when an item is selected.
How to assign and maintain roles for user accounts

To restrict user access to a specific meter for the ‘Enter Readings and/or Volumes’ and ‘View Readings and/or Volumes’ roles:

1. Uncheck the all meters box
2. In the ‘type’ drop down box select meter
3. Select the magnifying glass for the ‘Key’ field so that a pop-up of all active meters for the account displays. Select the desired meter to assign.

Note: To remove a meter select the ‘-’ sign next to the meter number.

4. To assign multiple meters (but not ALL meters), select the ‘+’ to add a new row and repeat steps 1-4 as necessary.
How to assign and maintain roles for user accounts

To restrict user access to all meters for a Company for the ‘Enter Readings and/or Volumes’ and ‘View Readings and/or Volumes’ roles:

1. Uncheck the all meters box
2. In the ‘type’ drop down box select All Meters for Company
3. Select the magnifying glass for the ‘Key’ field so that a pop-up of all meters by Company for the Producer account displays. Select the desired company to assign.
4. To assign multiple companies or meters, select the ‘+’ to add a new row and repeat steps 1-4 as necessary.

Note: To remove a company or meter select the ‘-’ sign next to the meter number.

Note: This feature may not apply to all Producer accounts as meters may all be within one National Fuel business unit, such as Distribution, Supply, or Empire.
How to assign and maintain roles for user accounts

The following is a section of the Functional Maintenance screen which will display all roles available to be assigned for a selected user:

Once all desired roles have been assigned/updated, password has been set (if applicable), and contact types have been assigned, select ‘Save’ to keep inputs or ‘Cancel’ to discard. Either option will direct you back to the Maintain Users menu.

Note: This ‘Set User Password’ box will only display the first time a user is assigned roles. The Maintain Users menu contains the option to reset passwords/unlock accounts for all current users.
How to assign and maintain roles for user accounts

The following shows the warning message that will display if a primary contact type is changed:

Remember only one user can be listed as a primary for each contact type. If the primary is changed this warning message will be displayed by the system to alert you. If the change was not desired, select the ‘User Functions’ link for the user you wish to make the primary and follow the instructions as noted in the previous slides.
How to assign and maintain roles for user accounts

The following is a summary of users which is displayed by selecting the Summary tab on the Maintain Users menu:

This Summary tab provides the SA with a quick glance overview of all users and their assigned roles and contact types by production group and individual account. This makes review quick and easy!

This summary is particularly helpful for monitoring the primary contact types as only one may be assigned.
How to reset passwords/
unlock user accounts
How to reset passwords/unlock user accounts

The following is the **Maintain Users** menu which will display all contacts and the options available to the SA to maintain their accounts:

As previously shown, this screen allows the SA to add users, edit contact information, and maintain roles and contact types.

Additionally, this screen allows the SA to remove a user by selecting the ‘Remove’ button. A warning will appear stating that the user and all roles and contact types associated with the company will be removed. A ‘yes’ or ‘no’ option will be available.

The SA is responsible for assisting users with account login issues, such as forgotten passwords or locked accounts.

An SA can reset a user’s password by selecting the ‘Chang Pswd/Unlock’ link and entering a new password. If the ‘Password Expired?’ or ‘Account Locked Out?’ boxes are checked the SA must uncheck them prior to selecting save.

Remember passwords must be 8 characters in length and contain 1 uppercase letter, 1 lowercase letter, and 1 number.

Passwords are required to be changed every 90 days.

After 5 failed log-in attempts a user’s account will become locked.
Still have questions?
Contact Bonnie Confer, GM System Administrator,
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