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

Business Entity: Principal Gas Inc.
Business Entity ID: 11308
SA – Samuel Skinner (by default has SA privileges for all accounts under the Business entity)

Account: Happy Gas, Inc
Account ID: HAP002
SA – No SA assigned (Skinner serves as SA via Business Entity)

Account: Principal Gas Inc.
Account ID: PRI002
SA – Marge Simpson (Skinner also serves as SA via Business Entity)
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”
**Required Information**

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

![Contact Maintenance Form]

**Business Entity ID** 11306

**Name:** Skinner, Seymour

**First Name:** Seymour

**Middle Name:**

**Last Name:** Skinner

**Title:**

**Suffix:**

**Address 1:** 123 mile road

**Address 2:**

**Address 3:**

**Address 4:**

**Country:** USA

**State:** NY

**City:** main

**Zip Code:** 14221

**User ID** skinners

**Work Phone:** 716/823-2222

**Alternate Phone:**

**24 Hour Phone:**

**Cell Phone:**

**Fax Number:**

**Pager:**

**Email Address:** ruissm@nattuel.com

**Alt. Email:**

**IM Address:**

![Save and Cancel Buttons]
Reviewing User Functions

The SA can review each user’s rights by selecting “User Functions.”
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.
Adding a User

- To add users, return to the “Maintaining Users” page, and click the button at the bottom of the page.
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.
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.
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.
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.
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.
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.
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
• 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.
SA at the Account Level

• When Marge logs in and looks at her user functions, she will only see options for Principal Gas, Inc.
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.
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.
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.
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.
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.
An SA can review user rights of both employees and agents via the “Summary” tab on the “Maintain Users” page.
The SA for Principal Gas, Inc. cannot 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.
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:
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