System Security Administrator

Training Module

This module is designed to assist your company's SSA in the administration of access and permissions for all 1Line user accounts at your company.

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Important Information – Please Read

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Introduction

The **System Security Administrator (SSA)** role was created to ensure that *one* user per Business Associate (BA) has access to all the available 1Line functions for that company. In addition, the **Customer User Administration** role may be assigned to <u>multiple</u> people at each company so that they can serve as backups to the SSA. A SSA is designated at their company and set up in 1Line by a Commercial Services Representative.

SSA Responsibilities

1. **The initial SSA receives the first User ID and password for the company.** The SSA will be issued a User ID and password by Williams. The login screen for the 1Line system may be accessed from the Williams Gas Pipeline Portal page at www.1Line.Williams.com , by clicking on the **Customer Activity** link under Transco.

2. The *first* user for your company to access 1Line will be asked to accept the **1Line Form of Service Agreement**. *Every* user for your company that accesses the 1Line Testing or Training Systems (www.1LineTraining.Williams.com) will be asked to accept the **1Line Testing and Training Agreement** each time these systems are accessed. Both agreements can be found on [Transco's Info Postings](#) page, under **Resources > Agreements/Forms.**

3. **The SSA has rights to all security roles assigned to any other employee at their company.**

4. **SSA is the default contact.** When any 1Line process requires a contact (i.e. Billing, Contracts) and one cannot be found, the system will default to the SSA as the contact party; however, if a contact is not specified, and no SSA exists, then 1Line will display "No Contact Found" as the name.

5. **SSAs administer the access and permissions for all 1Line user accounts at their company.** SSAs add new users from their company to 1Line and have the ability to make changes to <u>Addresses</u>, <u>Contacts</u> and <u>Roles</u>.

6. **SSAs remove users at their company, as appropriate.** As users change jobs or companies, the SSA should remove these user roles and/or inactivate the 1Line users so that they can no longer access the Company's records.

7. **SSAs work with the users at their company to maintain current contact information (i.e. email, phone numbers, fax number, address)**. 1Line contains many system notifications which require a current email, phone number and/or fax number for each user. The individual users can update this information, but from a company perspective, the SSA should review contact information periodically and update as needed.

Note:

- *Only a Commercial Services Representative can remove and assign an SSA Role or **unlock passwords**.*

- *A user at your company who has been granted the customer user administration role can perform all functions below.*

Adding a New User

1. Select **Navigation> Customer Information > Business Associate Contacts**.

2. Select **Actions Menu > Add**.

3. Enter contact information; fields marked with an asterisk are required.

4. Click on the **Roles** button for a list of available roles.

5. Select the appropriate roles for that user from the list on the left column by clicking on the role(s).

6. Once selected, click on the right arrow indicator ➡ to move the role(s) selected to the right column. This indicates that these are the role(s) to be added.

   - To move role(s) back to the left column, click on the role(s) to be removed from the right column then click the left arrow indicator ⬅

   - To move ALL roles at once to the right column to be selected, click on the right arrow indicator |➡

   - To move ALL roles at once back to the left column, click the role(s) to be removed from the right column then click on the left arrow indicator |⬅

Note:

- *A single role can be moved from the column it is in to the other column by double clicking on it*

- *Multiple roles can be selected by using the SHIFT or CTRL button when clicking*

7. Select **OK**.

8. You must select **Actions Menu > Save** to save the information before exiting the page.

   - The new user is now on the contact list page.

   - 1Line will send the SSA an email with the new user data (i.e. User Id, Password, Roles, etc.)

9. The SSA must communicate the User ID and the temporary password to the new user.

Managing Emails

1. In order for you to receive emails pertaining to certain roles you need to make sure you have entered a valid email address for one or more of the following email options when adding a new user: **Work E-mail, Secondary E-mail, and Text Messaging E-mail.**

2. Select: **Navigation> Customer Information>Business Associates Contacts**

3. Select desired **User ID** to update email information.

4. Select: **Actions Menu > Edit**

5. Enter in or update the email addresses, then select the checkbox(es) next to the appropriate email address or addresses to enable emails to that email address.

6. To receive emails related to any Business Unit and Role, place a check in the **Email Notification** box provided next to the Role.

7. Select **Actions Menu > Save** before exiting.

Viewing Contact Setups

1. Select **Navigation> Customer Information>Business Associate Contacts**

2. Select desired **User ID** and select **Actions Menu > Inquire**

    *   This function is for viewing only.

3. All **General Contact Information** and assigned **Roles** can be viewed on this page.

Note:

   *   *Viewing contact setups can also be accessed by selecting **Navigation>Customer Information>Business Associate Contact Details***

        o *Enter the User ID and click Retrieve.*

Editing Contact Information

1. Select: **Navigation> Customer Information>Business Associate Contacts**

2. Select desired **User ID** to edit information.

3. Select: **Actions Menu > Edit**

4. Make any changes to the information shown.

5. Select: **Actions Menu > Save** before exiting.

Note:

- *Editing contact information can also be accessed by selecting **Navigation>Customer Information>Business Associate Contact Details***

    o *Enter the User ID and click Retrieve.*

Password Resets

1. Select: **Navigation> Customer Information>Business Associates Contacts**

2. Select desired **User ID** who needs password reset.

3. Select: **Actions Menu > Reset**

- The new password will be displayed at the top right of the screen above the column header.

4. The SSA must communicate the temporary password to the user.

Inactivating Users

1. Select: **Navigation> Customer Information>Business Associates Contacts**

2. Select desired **User ID** to Inactivate.

3. Select: **Actions Menu > Edit**

4. Select: **Actions Menu > Inactivate/Activate**.

- You may select **Ok** or **Cancel**. If you select Ok all roles will be removed

5. Select: **Actions Menu > Save**

- All roles are removed and user is inactivated immediately

Note:

- *Inactivating users can also be accessed by selecting **Navigation>Customer Information>Business Associate Contact Details***

    o *Enter the User ID and click retrieve.*

Removing Roles

1. Select: **Navigation> Customer Information>Business Associates Contacts**

2. Select desired **User ID** to remove roles.

3. Select: **Actions Menu > Edit.**

4. Click on the **Select Roles** button for a list of available roles.

5. Select **Role(s)** to be removed on the right column and click on the left arrow indictor to move selected role(s) back to the left column. This indicates selected role(s) will be removed. ⟵

6. Select **OK**

7. Select **Actions** Menu **>** Save before exiting.

Note:

- *Removing roles can also be accessed by selecting **Navigation>Customer Information>Business Associate Contact Details***

    o *Enter the User ID and click retrieve.*

- *If ALL ROLES are to be removed select ⟵however, if the user will not have any roles, they will be a good candidate for inactivation*

Adding Roles

1. Select: **Navigation> Customer Information>Business Associates Contacts**

2. Select desired **User ID** to add roles.

3. Select: **Actions Menu > Edit.**

4. Click on the **Select Roles** button for a list of available roles.

5. Select **Role(s)** to be added on the left column and click on the right arrow indictor⟶to move selected role(s) to the right column. This indicates selected role(s) will be added.

6. Select **OK**.

7. Select **Actions Menu > Save** before exiting.

Note:

- *Adding roles can also be accessed by selecting **Navigation>Customer Information>Business Associate Contact Details***

    o *Enter the User ID and click retrieve.*

Identifying users with specific Roles

1. Select: **Navigation> Customer Information>Business Associates Contacts**

2. Next to the **Roles** filter, click on the link labeled **Roles.**

3. Select **Role(s)** to be added on the left column and click on the right arrow indictor➔ to move selected role(s) to the right column. This indicates selected role(s) will be added to the search criteria.

4. Select **OK**

5. Select **Retrieve**

   • The users with the specified roles will be displayed.

Identifying User History Information

1. Select: **Navigation> Customer Information>Business Associates Contacts**

   Specific User ID history information is provided in the following column fields.

   • **Start Date** – When the User ID was first created in 1Line

   • **Last Login** – When the user last logged in.

2. Select the desired **User ID** to view who lasted updated the account

3. Select: **Actions Menu > Inquire**

4. Within the **General Contact Information,** the right column has a field labeled **Last Change User ID**

   • **Last Changed User ID** – The last user to make changes to the account.

Reports to Assist in the Management of User Setups

1. Select the **Reports** tab from the banner menu on any page in 1Line.

   • The **Report List** page loads.

2. Select the **Report Request** tab on the right of the screen.

3. Select **Customer Info** as the **Functional Area**.

   • A list of **Customer Info Reports** will populate in the **Report Name** field.

4. Select **Business Associate Contact Role Assignment**.

5. Populate all required fields (marked with an asterisk).

6. Select **Submit Report**.

7. To view the requested report, go back to the Reports List page by selecting the **Report List** Tab on the top left of the screen.

8. Select **Retrieve**.

    - The **Business Associate Contact Role Assignment Report** is viewable once a status of **Success** is shown.

9. To check the latest report status, select **Retrieve**.

    - This report will display User Name, User ID and all of their roles.

10. Other reports to help manage your user setups are: **Business Associate Contact Information** and the **Business Associates Inventory Analysis** reports.

User Roles

Refer to the table below for a list of Roles and a brief description of each.

Business Function	Role	Access Granted
Allocations	Allocation PDA Update	Allows users to add/maintain PDAs
Allocations	Allocation View	Allows users to view allocations
Balances	*Balance Trade Contact	One per company is the default. Contact for trading imbalances.
Balances	Balances View	Allows users to view balances
Billing/Invoices	*Billable Party Commodity	Designated address to receive commodity invoices – can only have one per company
Billing/Invoices	*Billable Party Demand	Designated address to receive Demand invoices – can only have one per company
Billing/Invoices	Billing and Invoice Charges View	Allows users to view invoices; If user subscribes to notices on this role, email will be sent when invoices are final and ready to be viewed.
Capacity Release	Capacity Release Bids	Allows users to view and create capacity release bids
Capacity Release	*Capacity Release Contact	Designates this user as the default capacity release contact; one per BA
Capacity Release	Capacity Release Offers	Allows users to view and create capacity release offers
Capacity Release	Capacity Release View	Allows users to view capacity release

Business Function	Role	Access Granted
Nominations	*Confirmation Party Primary Contact	Designates the contact party the Transco Representative will see on the Confirmation pages – Can only have one per company
Nominations	Confirmations	Allows users the ability to confirm
Contract Execution	Contract Execution	Allows users the ability to electronically execute contracts
Contracts	Contract Maintenance	Allows users to submit contract requests and contract amendment requests for the contracts which are request able via 1Line
Contracts	*Contract Notice Recipient	Designated address to receive contract notices; one per company
Contracts	Contract View	Allows user to view contracts
Billing/Invoices	*Courtesy Copy Recipient	If company has elected US mail or Express mail for the rendering of invoices, Address to receive an extra copy of invoice; can have more than one per company
E-mail Notice Recipient	*Critical Notice Recipient	Allows users the ability to receive critical notices via email
Customer Information	Customer Info View	Allows users to view customer info
Customer Information	Customer User Administration	Allows users to maintain BA contacts; back up SSA role
Discounts	Discounts View	Allows users to view discounts
Nominations	*E-Notification Nom Change Operator	Allows users that are operators the ability to receive email notification of changes to noms in ID1, ID2 or Evening cycles. This email may be used as a trigger to review PDA's
Nominations	*E-Notification Pool Out of Balance	Allows users to receive emails regarding Pools Out of Balance
Nominations	*E-Notification Scheduled Cuts Operator	Allows users to receive emails regarding Scheduled Cuts Operator
Nominations	*E-Notification Scheduled Cuts Shipper	Allows users to receive emails regarding Scheduled Cuts Shipper
Measurement View	Measurement View	Allows users to view measurement
Nominations	Nominations	Allows users the ability to create and maintain nominations
Nominations	Nominations View	Allows users to view nominations
E-mail Notice Recipient	*Non-Critical Notice Recipient	Allows users the ability to receive non-critical notices via email

Business Function	Role	Access Granted
Billing/Invoices	*Rate Refund	Address to receive copy of refund invoice or payments; one per company
Retro Request	*Retro Reminder	Allows user to receive email notification that a retro request is expiring soon
Retro Request	*Retro Request Notice	Allows user to receive email regarding retros
Storage	Storage Transfer	Allows user the ability to do storage transfers
Storage	Storage View	Allows user to view storage
Customer Information	System Security Administrator	SSA – Designated user that is responsible for setting up users, assigning roles – can only have one per company
Balances	Trade Balances	Allows users the ability to trade balances/view balances page

Please contact your Commercial Services Representative with any SSA questions.