

Company Menu – Search, Delete, and Update a Person

Purpose:

The purpose of this document is to provide detailed instructions for a Nicor Gas Nomination System administrator to search for, delete, and update people associated with their company.

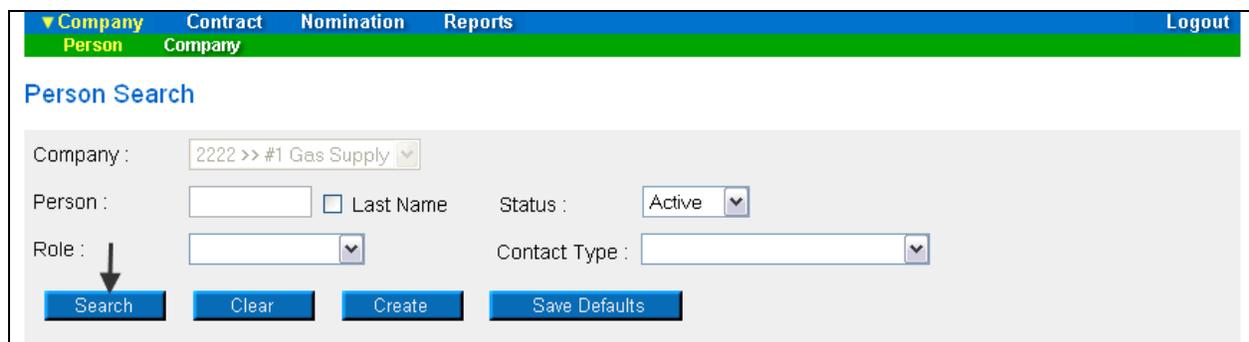
Note: If a field is required to be completed, the field name is **bold**.

Instructions:

You can either choose to display all users or search for a specific user.

Display all Users

1. Click on Company in the Main Menu. The Person Search page will display.
2. To view all active users in your company, click the **Search** button.



3. The following information regarding the people will display at the bottom of the page.

Company Name	Person Name	Contact Type	Phone	Role	Active		
#1 Gas Supply	John Jones	Nominations: Primary Contact	(777) 345-1234 (Business Phone)	Administrator	<input checked="" type="checkbox"/>		
#1 Gas Supply	Judy Jones	Nominations: Primary Contact	(777) 454-2312 (Business Phone)	User	<input checked="" type="checkbox"/>		
#1 Gas Supply	Rachel Purnham	Nominations: Alt Contact	(987) 678-9825 (Business Phone)	User	<input checked="" type="checkbox"/>		
#1 Gas Supply	Bill Walters	Nominations: Alt Contact	(999) 765-2312 (Business Phone)	User	<input checked="" type="checkbox"/>		

Search for a User

1. Click on Company in the Main Menu. The Person Search page will display.
2. The search can be filtered by any of the following optional fields.

Person Search

Company :

Person : Last Name Status :

Role : Contact Type :

Field	Function
Person	To search by a person’s name, enter the first few characters of their first or last name.
Last Name	If last name is entered in the field above, check the Last Name box.
Status	To search by status, select Active, Inactive or blank. Active users currently have access to the system. Inactive users do not have access to the system. Selecting the blank status will return results for both active and inactive users.
Role	To search by role, select the user’s role. The choices are: <ol style="list-style-type: none"> 1. Administrator - This person can perform all user functions. In addition, they can create and update information on people within their company. 2. User – This person can create nominations, view contracts, view and create paths, and generate reports. 3. Read Only User – This user can view all information related to their company but cannot make changes. 4. Non-User – A person who does business with Nicor but doesn’t use the Gas Nominations system.
Contact Type	To search by contact type, select the user’s contact type. The choices are: <ol style="list-style-type: none"> 1. Nominations: Primary Contact 2. Nominations: Alternate Contact 3. Weekend Person 4. Contract Administrator 5. Alternate Contract Administrator 6. Billing Administrator 7. Technical Support 8. General

3. Click the **Search** button. If no records are found, a message will display saying “no records found”.
4. If records match the search criteria, the following information will display at the bottom of the page. If more than one record is found, the information is sorted alphabetically by Last Name and Role.

Company Name	Person Name	Contact Type	Phone	Role	Active	✎	✖
#1 Gas Supply	Judy Jones	Nominations: Primary Contact	(777) 454-2312 (Business Phone)	User	☑	✎	✖
#1 Gas Supply	Rachel Purnham	Nominations: Alt Contact	(987) 678-9825 (Business Phone)	User	☑	✎	✖
#1 Gas Supply	Bill Walters	Nominations: Alt Contact	(999) 765-2312 (Business Phone)	User	☑	✎	✖

Deleting a User

1. To delete a user, click the  icon. The following message will display.



2. Click the **OK** button. The person will be deleted from the system.

Updating a User

1. To view detailed information for a user or to update a user, click the  icon. The Update Person page will display.

Update Person

Company:	2222 >> #1 Gas Supply	
Prefix :		
First Name :	Janice	
Middle Name :		
Last Name :	Peterson	
Suffix :		
Job Title :	Scheduler	
Contact Type(s): Hold [Ctrl] to select multiple types	Nominations: Primary Contact Nominations: Alt Contact Weekend Person	Current Contact Type(s) Nominations: Primary Contact Weekend Person
E-mail Group(s): Hold [Ctrl] to select multiple groups	General Supplier Information Critical Day Gas Advisory	Current E-mail Group Type(s)
Address :	Billing Address->2727 Company Way, , Dayton, OH, 77777	
Role :	User	
Email Address :	jpete@1gs.com	
IM Information :		

Note: If a field is required to be completed, the field name is **bold**. Other fields are optional.

Field	Function
Prefix	Enter the user's prefix. Choices are: 1. Mr. 2. Mrs. 3. Ms. 4. Dr. 5. Rev.
First Name	Enter the user's first name.
Middle Name	Enter the user's middle name.
Last Name	Enter the user's last name.
Suffix	Enter the user's suffix. Choices include: 1. Jr. 2. II 3. III 4. Sr.
Job Title	Enter the user's job title.
Contact Type	Select the user's contact type. The choices are: 1. Nominations: Primary Contact 2. Nominations: Alternate Contact 3. Weekend Person 4. Contract Administrator 5. Alternate Contract Administrator 6. Billing Administrator 7. Technical Support 8. General To select multiple contact types, hold the [Ctrl] key while clicking on the types. Note: The current contact type is listed to the right of this field.
E-mail Group(s)	Select e-mail group(s) for the user. To select multiple e-mail groups, hold the [Ctrl] key while clicking on the groups. Note: The current e-mail group types are listed to the right of this field.
Address	Select the user's address from the dropdown list.
Role	Select the user's role. The choices are: 1. Administrator - This person can perform all user functions. In addition, they can create and update information on people within their company. 2. User – This person can create nominations, view contracts, view and create paths, and generate reports. 3. Read Only User – This user can view all information related to their company but cannot make changes. 4. Non-User – A person who does business with Nicor but doesn't use the Gas Nominations system.
Email Address	Enter the user's e-mail address.
IM Information	Enter the user's Instant Messaging address

Field	Function
User ID	Enter a User ID for the user. The User ID must be at least 6 characters.
Active	Click the box to add a check (√) to mark the user as Active. Click the box to remove the check to mark the user as inactive.
Phone Type	Select the phone type for the phone number you will enter in the Phone text box. The choices are: 1. Business Phone 2. Cell Phone 3. Alternate Phone 4. On-Call Pager 5. Fax 6. Answering Service/ After Hours 7. Home Phone
Phone x Ext #	Enter the phone number and extension for the number that corresponds to the phone type above. To add a phone number that has been entered, click the + icon. Note: You must click the + icon to add the phone number prior to saving the updates. To cancel the entry of a phone number before it is added, click the X icon. To update a phone number, click the icon. To delete a phone number, click the icon.

2. To save the user’s information, click the **Save** button. If errors exist, an error message will display. The error must be corrected before you can save.
3. To cancel the entry of the new user, click the **Cancel** button.
4. To reset a user’s password, click the **Password Reset** button. The following window will display.

Gas Nomination Password Update - Microsoft Internet Explorer - Ni...

Reset Password

User ID: 2222USER

New Password: [minimum 8 characters]

Confirm Password: [minimum 8 characters]

OK Cancel

5. Enter the new password in the New Password and Conform Password text boxes.
6. Click the **OK** button. The new password will be e-mailed to the user.