

Company Menu – Create a Person

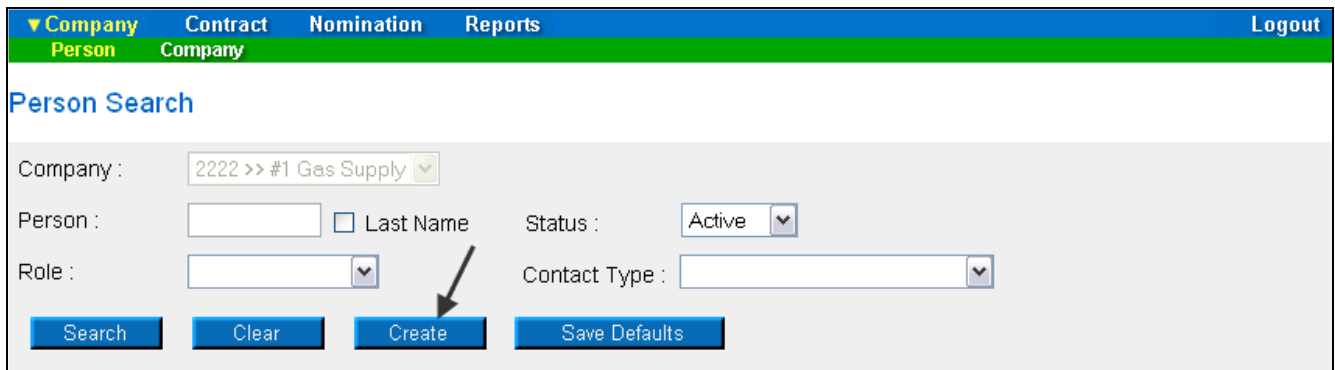
Purpose:

The purpose of this document is to provide detailed instructions for a Nicor Gas Nomination System administrator to create users for their company. Only administrators can create users.

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

Instructions:

1. Click on Company in the Main Menu. The Person Search page will display.
2. Click the **Create** button.



Person Search

Company : 2222 >> #1 Gas Supply

Person : Last Name Status : Active

Role : Contact Type :

3. The Create Person page will display.

Create Person

Company:

Prefix :

First Name :

Middle Name :

Last Name :

Suffix :

Job Title :

Contact Type(s):
Hold [Ctrl] to select multiple types

E-mail Group(s):
Hold [Ctrl] to select multiple groups

Address :

Role :

Email Address :

IM Information :

User ID : [minimum 6 characters]

Password : [minimum 8 characters]

Confirm Password : [minimum 8 characters]

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.

Field	Function
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.
E-mail Group(s)	Select e-mail group(s) for the user. The selection of e-mail groups will determine what e-mails the user will receive. To select multiple e-mail groups, hold the [Ctrl] key while clicking on the groups.
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.
Email Address	Enter the user's e-mail address.
IM Information	Enter the user's Instant Messaging address.
User ID	Enter a User ID for the user. The User ID must be at least 6 characters. The user will utilize the User ID to log into the system.
Password	Enter a temporary password for the user. The password must be at least 8 characters. When the user logs in, they will be prompted to change their password.
Confirm Password	Re-type the password listed in the box above. Both passwords must match.

Active :

Phone List :

Phone Type	Phone x Ext #
<input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/>

Field	Function
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. The default is checked.
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 ✖ icon.

- 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.
- To cancel the entry of the new user, click the **Cancel** button.

The screenshot shows a web form titled "Person Search". It includes several input fields: "Company" with a dropdown menu showing "2222 >> #1 Gas Supply", "Person" with a text box and a "Last Name" checkbox, "Status" with a dropdown menu showing "Active", "Role" with a dropdown menu, and "Contact Type" with a dropdown menu. Below these fields are four buttons: "Search", "Clear", "Create", and "Save Defaults". At the bottom of the form, a red message reads "Person saved successfully" with a black arrow pointing to it from the right.

- When the new person is saved successfully, the message “Person saved successfully” will display.