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ANR Pipeline Company

(EPTS)

Corporate System Training Manual

For

ANR - External Users

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APPLICATION OVERVIEW

The Corporate Information Application is used to create and maintain company and related data for entities that do business on the GEMS System. Users can also view the following data:

- Ø Entity Details
- Ø Business Uses
- Ø EDI Associations
- Ø Analyst Associations
- Ø Contacts
- Ø Addresses

EXTERNAL USERS ROLES

All external users have the ability to view their own company and related data in the Corporate Application. The External Security Administrator (ESA) for your company will also have the ability to both create and maintain contact information and business use association data.

TSP ENTITY DETAILS

After you log in from www.anrpl.com page, you will go to the EPTS Portal Page. To access the Corporate application, move your mouse to the Menu area. The menu items will be displayed. Click on Corporate, select TSP Entity, next select Maintain.
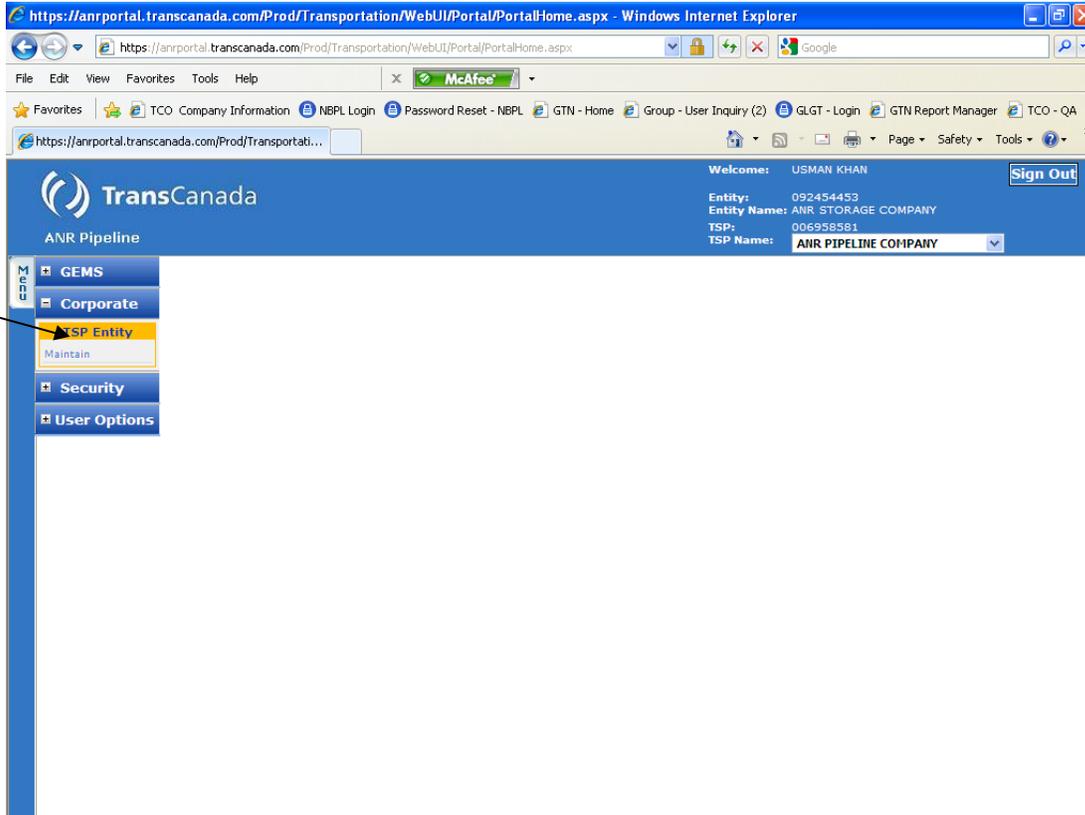
.
Select the retrieve button to refresh the screen. Your company information will be displayed.
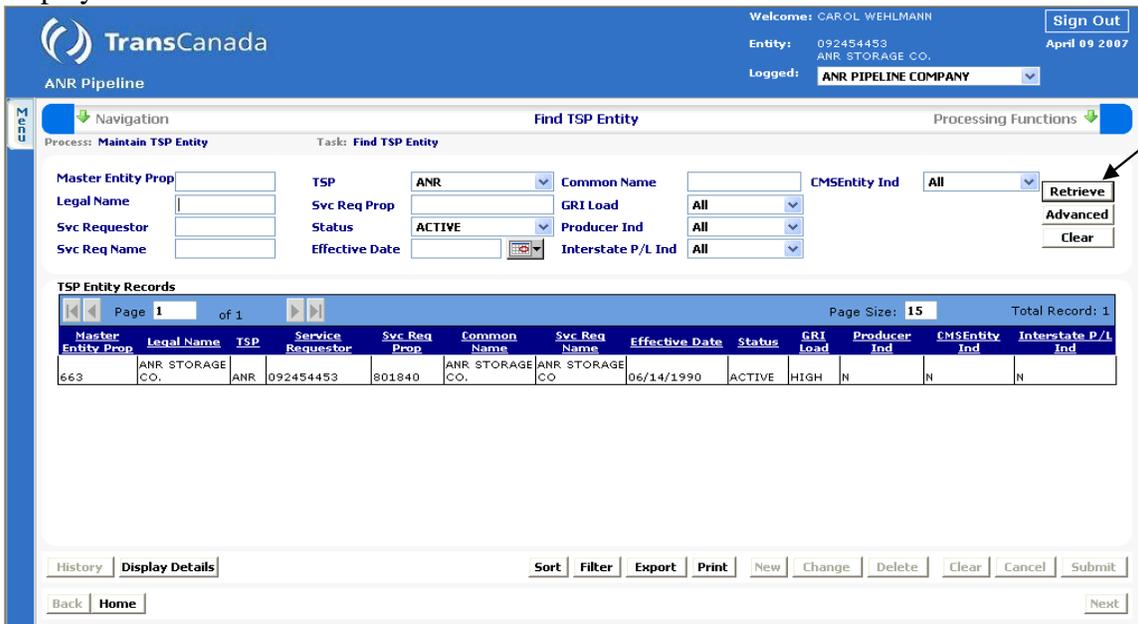
Double click on the company name or highlight the company name and select the button called "Display Details" at the bottom left of the screen to display the Detail, Business Use, EDI Associations, Analyst Associations, Contacts and Addresses tabs.
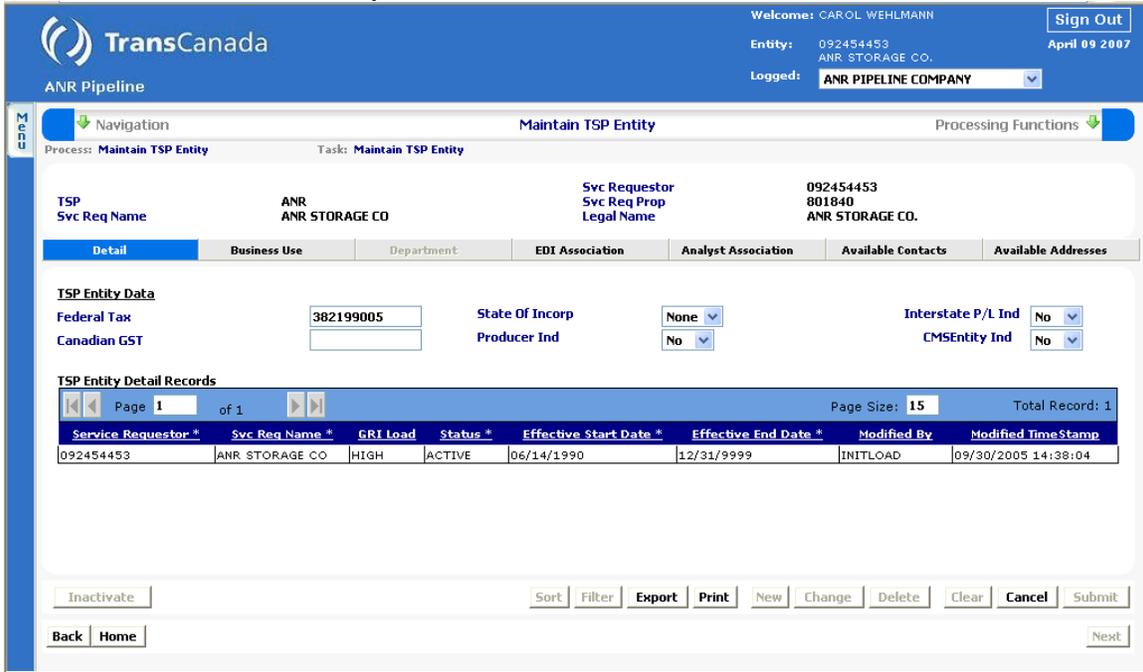
The Detail tab displays information related to your company such as Service Requestor (Duns id), Federal Tax id, etc.

The Business Use tab displays the address types and the associated address and contact for each. From this screen, the business use associations can be added, modified or inactivated by your company External Security Administrator (ESA).

If your company processes data through EDI, the EDI Association tab will display the EDI datasets and names that have been set up for you.

Analyst Association shows the Marketing Representative, Account Representative, and Accountant assigned to your company.

The Contacts tab will display all of the contacts that have been added to the system. You can add, modify or inactivate contacts for your company if you are the External Security Administrator (ESA).

The Addresses tab will display all of the addresses that have been added to the system. To maintain this information, you will need to contact your Account Representative.

CREATE A CONTACT

This function can only be performed by the External Security Administrator (ESA).

To add a Contact, click on the Contact tab, and then click on NEW at the bottom right of the page.

Enter the appropriate information. Items with ** must be entered. However, if the First Name and Last Name is entered, the Department is not required, and if a Department is entered, the First and Last name are not required. Duplicate contacts can not be created.

If the contact first name and last name entered already exists for that entity, the user will get a validation message preventing them from creating the contact record. At least one telephone number is required. After adding a telephone number, click on Submit.

The following message will be displayed. Contacts that are not associated to a business use will be inactivated after 30 days. If you Cancel, you will be taken back to the Entity Contact screen. If you select OK, you will be taken to the Create a Business Use Association screen.

CREATE A BUSINESS USE ASSOCIATION

To create a Business Use Association, first click on Business Use.
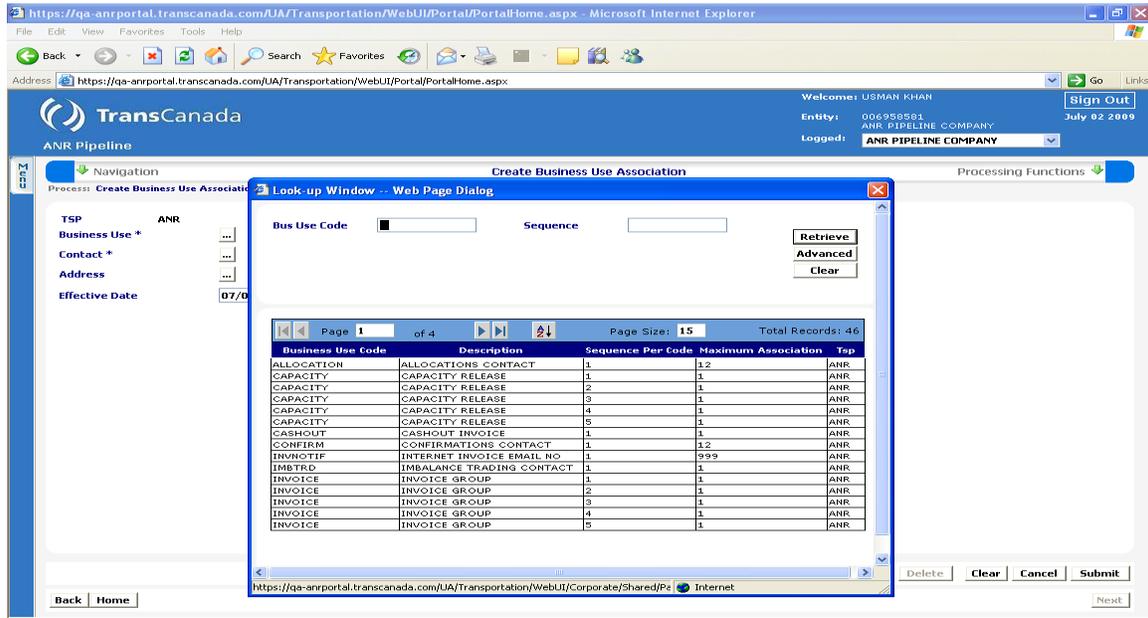
A list of valid Business Uses will be displayed. Double click on Business Use Code/Sequence

Next click on Contact. A list of valid contacts will be displayed. Double click on the contact

Next click on Address. A list of valid addresses will be displayed. Double click on the address.

After all information has been entered, click on Submit

MAINTAIN A CONTACT

An ESA has the right to maintain the details associated to a contact. To maintain a contact, from the Contact tab, highlight or select the row. Next either double click into the record or select the Change button at the bottom of the screen. From the Maintain Contact Screen, the following fields can be updated on the record:
First Name, Last Name, Middle Initial, Department, Room Number, Status, Comments, Contact Details (Contact Type).

Updates to certain fields such as the Contact First Name and Last Name are not allowed if the Contact record is associated to an active logon id.

Updating the Contact Type:

List of Contact/Phone Type:
Cell – Cellular Telephone Number
Email – Email Address
Fax – Fax Telephone Number
Home – Home Telephone Number
Nom24 – 24 Hour Nomination Telephone Number
Work – Work Telephone Number
Work2 – Secondary Contact Telephone Number

Contact Type Changes: To add, modify or delete details for a contact type record – the ESA should select the Add Detail or Change Detail or Delete Detail button at the bottom of the screen.

Add Detail – select the Add Detail button, from the Contact Type dropdown – select a contact type. Enter data in the appropriate field.

Change Detail – Highlight a specific record in the contact detail. Update data in the appropriate field.

Delete Detail – Highlight a specific record in the contact detail. Select the Delete Detail button. (Note – all contacts require at least one phone type).

INACTIVATE A CONTACT

As ESA, you can also inactivate contacts that are no longer valid for your company. Before the contact can be inactivated, it must be removed from any active business use associations that it is tied to. If the contact has a user id, the ESA must first inactivate the user id. *Reference ESA Security procedures to inactivate a user id.*

Click on the Contacts Tab.

Highlight the contact to be inactivated and click on Change

Change the Status Code to Inactivate and click on Submit

Retrieving Inactive contact records:

Inactive contact records must be retrieved by going through the Filter button at the bottom of the screen. First select the filter option, from the status field select the status of "All" or "Inactive" from the dropdown, then select the Search button.

MAINTAIN A BUSINESS USE ASSOCIATION

A Business Use Association can be maintained to update the status, or the associated contact and/or address.

Select/Highlight the specific business use association. Double click on the record or select the Change button.

Select the option next to Contact *, to get a dropdown list of available contacts. Select the contact by double clicking on the record.

If updating the address in the business use association, select the option next to Address *, to get a dropdown list of available addresses. Select the address by double clicking on the record.

Click on the Submit button.

INACTIVATE A BUSINESS USE ASSOCIATION

Business Use Associations can be inactivated. If the Business Use is associated to a contract, the contract must be maintained to add a new business use association first. Inactivating a Business Use does not inactivate the individual address or contact.

To inactivate the Business Use Association, highlight the association to be inactivated. Click on Change

Change the Status to Inactive, and then click on Submit

To update the status of the Business Use Association from Active to Inactive – the business use association must not be tied to an active contract. If updating the status from Inactive to Active, the associated Address and Contact records must be activated first if they are not active.

<u>To retrieve an Inactive Business Use Association:</u>
Inactive business use association records must be retrieved by going through the Filter
button at the bottom of the screen. First select the filter option, next select the status field
from the list, from the dropdown select the status of "All" or "Inactive", then select the
Search button.