

EXISTING USER – CREATE AGENCY

The screenshot displays the 'Proposed Agency Detail' screen in the LINK System Customer Interface. The page title is 'Proposed Agency Detail' and the date is 7/20/2017 at 2:45:22 PM CDT. The main form contains the following fields:

- Prncpl Svc Req Entity Name: DEF GAS COMPANY
- Agent Svc Req Entity Name: CAMP ENERGY LLC
- Status: (empty)
- Agcy Eff From Date: 07/20/2017
- Agcy Eff Thru Date: 01/01/2200
- Date Initiated: 07/20/2017

At the top right, there are buttons: Retrieve, Clear, Accept, Reject, Proposal (highlighted), and Submit. A dropdown menu for the 'Proposal' button is open, showing options: New Proposal (highlighted), Delete Proposal, and Save Proposal.

At the bottom of the screen, there are fields for Principal and Agent contact information and acceptance times:

- Principal Contact Name: (empty)
- Agent Contact Name: (empty)
- Principal Accepted By: (empty)
- Agent Accepted By: (empty)
- Principal Accepted Time: 07/20/2017 14:44:13.261
- Agent Accepted Time: 07/20/2017 14:44:13.261

The administrator can create a proposed agency by selecting the “Proposed Agency Detail” screen in the Security menu and clicking the “Proposal” button at the top of the page and selecting “New Proposal.”

The screen will appear and require the Principal and Agent BAs.

SystemTest Build: 8.24.02 Login: TSTCAMP911 Agency Detail 7/20/2017 2:29:08 PM CDT

Retrieve Clear Renew Terminate Submit

*Prncpl Svc Req Name DEF G X
*Agent Svc Req Name DEF GAS CO
Service Provider TEXAS EASTERN

Prncpl Svc Req Entity Name Agcy Eff From Date 07/20/2017 Next Review Date 07/20/2017
Agent Svc Req Entity Name Agcy Eff Thru Date 07/20/2017 Status
Effective Date 07/20/2017

Options & Contacts Roles Role Specifics

Show EffectiveFuture All

Eff From Date	Eff Thru Date	Authorize Agent to be Local Security Admin?	Allow Agent's Affiliates to Access Principal's data?	Allow Agent to view prior data?	Allow Principal to keep update rights?	Termination TS

0 Rows

Principal Contact Name
Principal Accepted By
Principal Accepted Time 07/20/2017 14:18:12.461

Agent Contact Name
Agent Accepted By
Agent Accepted Time 07/20/2017 14:18:12.461

Agencies allow entities to share a range of functionality between one or more agents.

Agencies are comprised of an Agent and Principal party, and either party may propose an agency.

The type ahead feature and lookup are available for Principal and Agent BAs. The lookup is indicated by the asterisk (*) before the data field name.

Double click in the data field to use the lookup. Also, check to ensure you have chosen the correct Service Provider.

SystemTest Build: 8:24:02 Login: TSTCAMP911 Proposed Agency Detail 7/20/2017 3:00:19 PM CDT

Retrieve Clear Accept Reject Proposal Submit

*Prncpl Svc Req Name DEF GAS CO Prncpl Svc Req Entity Name DEF GAS COMPANY Agcy Eff From Date 07/20/2017
*Agent Svc Req Name CAMP ENERGY Agent Svc Req Entity Name CAMP ENERGY LLC Agcy Eff Thru Date 01/01/2200
Service Provider TEXAS EASTERN Status INCOMPLETE Date Initiated 07/20/2017

Proposal for new agency or modification made to an existing agency on this screen will not be in effect until approved by the Principal and Agent.

Options & Contacts Roles Role Specifics Errors View Existing New Delete

Access Options

Eff From Date	Eff Thru Date	Authorize Agent to be Local Security Admin?	Allow Agent's Affiliates to Access Principal's data?	Allow Agent to view prior data?	Allow Principal to keep update rights?	Change
07/20/2017	01/01/2200	<input type="text" value="Y"/>	N	N	N	View

Row 1 of 1

*Principal Contact User Id TSTCLIDEF1 *Agent Contact User Id TSTCAMP911
Principal Contact Name TESTING TESTING Agent Contact Name CJ SMITH
Principal Accepted By Agent Accepted By
Principal Accepted Time 01/01/0001 00:00:00.000 Agent Accepted Time 01/01/0001 00:00:00.000

The duration of the agency must be entered in the Agency Eff From and Thru Date fields.

The user must enter Access Options by choosing Y or N from dropdown which appears when clicking in the data field below the option.

- Access Options
 - Authorize Agent to be Local Security Administrator?
 - Checking “Y” allows the Agent to act as the Local Security Administrator for the Principal.
 - Allow Agent’s Affiliates to Access Principal’s data?
 - Checking “Y” allows any security Affiliates of the Agent to have access to the Principal’s data.
 - The Principal should ensure they want to allow this level of pass through access.
 - All Agent to view prior data?
 - Allows the Agent to view data prior to the establishment of the Agency.
 - Prior data includes that associated with all functions the Agent has been granted.
 - Allow Principal to keep update rights?
 - While assigning certain functions to an agent, the Principal retains the ability to perform certain functions and/or update data.

SystemTest Build: 8.26.00 Login: TSTCLJCAMPE Proposed Agency Detail 9/25/2017 7:25:42 PM CDT

Retrieve Clear Accept Reject Proposal Submit

*Prncpl Svc Req Name DEF GAS CO Pmncpl Svc Req Entity Name DEF GAS COMPANY Agcy Eff From Date 09/25/2017
*Agent Svc Req Name CAMP ENERGY Agent Svc Req Entity Name CAMP ENERGY LLC Agcy Eff Thru Date 01/01/2200
Service Provider TEXAS EASTERN Status INCOMPLETE Date Initiated 09/25/2017

Proposal for new agency or modification made to an existing agency on this screen will not be in effect until approved by the Principal and Agent.

Options & Contacts Roles Role Specifics Errors

Available Roles	
Role	Access Type
<input type="checkbox"/> CONTRACT INQUIRY	Inquire
<input type="checkbox"/> INVOICE EXTERNAL	Inquire
<input checked="" type="checkbox"/> MEASUREMENT ONLY	Inquire
<input checked="" type="checkbox"/> NOMINATION	Update & Inquire
<input type="checkbox"/> NOMINATION INQUIRY	Inquire
<input type="checkbox"/> OBA IMBAL VERIFIER	Update & Inquire
<input type="checkbox"/> THIRD PARTY VALUE SC	Update & Inquire
<input type="checkbox"/> UPDATE FOR ORDER 698 POI	Update & Inquire

Row 8 of 15
7 Selected

Assigned Roles						
Role	Eff From Date	Eff Thru Date	Specific	Change	Access Type	
<input type="checkbox"/> NOMINATION	09/25/2017	01/01/2200	<input type="checkbox"/>	New	Update & Inquire	
<input checked="" type="checkbox"/> MEASUREMENT ONLY	09/25/2017	01/01/2200	<input type="checkbox"/>	New	Inquire	
<input type="checkbox"/> CONTRACT	09/25/2017	01/01/2200	<input type="checkbox"/>	New	Update & Inquire	

Row 2 of 3
0 Selected

The “Roles Tab” shows the different roles that can be assigned to an Agent as well as the access type that role will have.

The LSA can choose Update and Inquire, or Inquire only, for each role and assign by selecting the box for that function and clicking the “Assign Role” button.

Click the “Submit” button in the top right hand corner to submit the agency.

SystemTest Build: 8.26.00 Login: CLJOHNSON Proposed Agency Detail 9/26/2017 10:24:14 AM CDT

Retrieve Clear Accept Reject Proposal Submit

*Prncpl Svc Req Name: DEF GAS CO Pmrcpl Svc Req Entity Name: DEF GAS COMPANY Agcy Eff From Date: 09/25/2017

*Agent Svc Req Name: CAMP ENERGY Agent Svc Req Entity Name: CAMP ENERGY LLC Agcy Eff Thru Date: 01/01/2200

Service Provider: TEXAS EASTERN Status: INCOMPLETE Date Initiated: 09/25/2017

Proposal for new agency or modification made to an existing agency on this screen will not be in effect until approved by the Principal and Agent.

Options & Contacts Roles **Role Specifics** Errors

Role: CONFIRMATION Access Type: Update & Inquire Role Eff From Date: 03/10/2016 Role Eff Thru Date: 01/01/2200

Available Specifics			
Contract/Meter	Eff From Date	Eff Thru Date	
<input type="checkbox"/> 12345	09/26/2017	01/01/2200	
<input checked="" type="checkbox"/> 67899	09/26/2017	01/01/2200	

Assign Specifics >
< Remove Specifics
View Existing

Assigned Specifics				
Contract/Meter	Eff From Date	Eff Thru Date	Change	
<input type="checkbox"/> 951942	03/10/2016	09/26/2017	No change	

2 Rows 0 Selected 1 Rows 0 Selected

The “Roles Specifics Tab” displays the contracts or meters associated with the assigned role.

The LSA can assign a specific role by “Contract” or “Meter” to the Agent by selecting the box for that function and clicking the “Assign Specifics” button.

Click the “Submit” button in the top right hand corner to submit the agency.

Agency Roles

Assignable Roles

Role Name	Type	Role Specific	Description
Capacity Release	Update and Inquire	NA	Assign the ability to create offers, bid on capacity and recall/reput capacity on behalf of the Principal.
Capacity Release INQ	Inquire	NA	View Capacity Release related information.
Confirmation	Update and Inquire	Meter	Confirm meters, update PDAs, view allocations and imbalances, execute reports, view measurement, submit PMAs
Confirmation Inquiry	Inquire	Meter	View confirmation, allocation, imbalance and measurement information.
Contract	Update and Inquire	NA	Request, Amend, Approve and view contracts.
Contract Inquiry	Inquire	NA	View contract related information.
Invoice External	Inquire	Contract	View invoices
Measurement Only	Inquire	Meter	View measurement information in LINK and the Measurement Reporting Portal
Nomination	Update and Inquire	Contract	Nominate on behalf of the Principal, execute associated reports, submit PMAs
Nomination Inquiry	Inquire	Contract	View nomination related information.
OBA Imbal Verifier	Update and Inquire	Contract	Verify monthly OBA imbalance information.
Third Party Value SC	Update and Inquire	NA	Assign IDA values to PDAs
Update for Order 689	Update and Inquire	Meter	Update Power Plant information resulting from Order 689.
Update\Execute All	Update and Inquire	NA	Provide all functions possessed by the Principal to the Agent.
View Gas Quality	Inquire Only	Meter	View Gas Quality information.

AGENCY APPROVAL WARNING

Cancel

OK

You are about to Accept agency relationship between DEF GAS CO and CAMP ENERGY. Agency set up or modification will be in effect upon approval by both Principal and Agent.

Click OK to ACCEPT the Proposed Agency.

Click CANCEL if you wish to EXIT acceptance process or further modify the Proposed Agency.

When submitting the proposed Agency, a warning message will appear as shown.

The LSA can choose “OK” to accept the proposed agency or “Cancel” to return to the screen and exit the submitting function.

LINK® System Access

SystemTest Build: 8.24.02 Login: TSTDEFCLJ

Proposed Agency List

Agency List

Agency Detail

Proposed Agency List

Proposed Agency Detail

Agency Roles

Name	Service Provider	Eff From Date	Eff Thru Date	Status	
DEF GAS CO	CAMP ENERGY	TEXAS EASTERN	07/20/2017	01/01/2200	AGENT ACCEPTED

Pncpl Svc Req Name	Agent Svc Req Name	Service Provider	Role	Eff From Date	Eff Thru Date	Specific
DEF GAS CO	CAMP ENERGY	TEXAS EASTERN	NOMINATION	07/20/2017	01/01/2200	<input type="checkbox"/>

The Local Security Administrator for the entity that did not create the proposed agency must approve it before it can be executed.

They will choose “Proposed Agency List” from the security menu and enter one of the filters at the top of the page.

Select the proposal and choose “Proposed Agency Detail” from the “Related Screens” dropdown at the top of the page.

SystemTest Build: 8.24.02 Login: TSTDEFCLJ Proposed Agency Detail 7/20/2017 3:47:24 PM CDT

Retrieve Clear **Accept** Reject Proposal Submit

*Prncpl Svc Req Name: DEF GAS CO Pncpl Svc Req Entity Name: DEF GAS COMPANY Agcy Eff From Date: 07/20/2017
*Agent Svc Req Name: CAMP ENERGY Agent Svc Req Entity Name: CAMP ENERGY LLC Agcy Eff Thru Date: 01/01/2200
Service Provider: TEXAS EASTERN Status: AGENT ACCEPTED Date Initiated: 07/20/2017

Proposal for new agency or modification made to an existing agency on this screen will not be in effect until approved by the Principal and Agent.

Options & Contacts Roles Role Specifics Errors

View Existing New Delete

Eff From Date	Eff Thru Date	Authorize Agent to be Local Security Admin?	Allow Agent's Affiliates to Access Principal's data?	Allow Agent to view prior data?	Allow Principal to keep update rights?	Change
07/20/2017	01/01/2200	N	N	N	N	New

The Local Security Administrator can accept or reject the proposed agency using the buttons at the top of the page. A warning screen will appear as before.

Clicking on “OK” will complete the approval; “Cancel” will return to the screen .

LINK® System Access

in: TSTDJANA123 Agency List 7/27/2017 2:58:53 PM CDT

Retrieve Clear Renew Terminate

*Agent Svc Req Name Service Provider [ALL] Effective Date 07/27/2017 Status [ALL]

Agent Svc Req Name	Service Provider	Eff From Date	Eff Thru Date	Next Renewal Date	Status	Pmcpl Appr TS	Agent Appr TS
CAMP ENERGY	TEXAS EASTERN	07/27/2017	01/01/2200	07/27/2018	ACCEPTED	07/27/2017 14:58:17.997	07/20/2017 15:27:54.402

1 Rows
0 Selected

Agency Roles

Pmcpl Svc Req Name	Agent Svc Req Name	Service Provider	Role	Eff From Date	Eff Thru Date	Specific	Specific Meters/Contracts
DEF GAS CO	CAMP ENERGY	TEXAS EASTERN	NOMINATION	07/27/2017	01/01/2200	<input type="checkbox"/>	

To view the status of an agency, select the “Agency List” from the menu to view details. The status column will display as First or Second notice sent if a renewal is needed.

The screenshot displays the 'Agency List' interface. At the top, there is a green navigation bar with a home icon and a menu icon. Below this, a grey header bar shows 'SystemTest Build: 8.24.02', 'Login: TSTDIANA123', 'Agency List', and the date/time '7/27/2017 3:10:22 PM CDT'. A toolbar contains icons for search, print, grid, refresh, star, and settings. On the right, there are buttons for 'Retrieve', 'Clear', 'Renew' (highlighted with a red box), and 'Terminate'. Below the toolbar are search filters: '*Pncpl Svc Req Name', '*Agent Svc Req Name', 'Service Provider' (dropdown menu showing '[ALL]'), 'Effective Date' (text input '07/27/2017'), and 'Status' (dropdown menu showing '[ALL]').

The main content area is titled 'Agency' and contains a table with the following data:

<input checked="" type="checkbox"/>	Pncpl Svc Req Name	Agent Svc Req Name	Service Provider	Eff From Date	Eff Thru Date	Next Renewal Date	Status	Pncpl Appr TS	Agent Appr TS
<input checked="" type="checkbox"/>	DEF GAS CO	CAMP ENERGY	TEXAS EASTERN	07/27/2017	01/01/2200	07/27/2018	ACCEPTED	07/27/2017 14:58:17.997	07/20/2017 15:27:54.402

At the bottom right of the table area, there are buttons for 'Row 1 of 1' and 'All Selected'. Below the table is a section titled 'Agency Roles' with a table structure including columns for 'Pncpl Svc Req Name', 'Agent Svc Req Name', 'Service Provider', 'Role', 'Eff From Date', 'Eff Thru Date', 'Specific', and 'Specific Meters/Contracts'.

To Renew an Agency, both the Principal and Agent party will need to sign on and select the “Renew” button after selecting the agency relationship from the Agency List.

Agency List

7/27/2017 3:14:04 PM CDT

Retrieve Clear Renew **Terminate**

Service Provider [ALL] Effective Date 07/27/2017 Status [ALL]

Eff Thru Date	Next Renewal Date	Status	Prncpl Appr TS	Agent Appr TS
01/01/2200	07/27/2018	ACCEPTED	07/27/2017 14:58:17.997	07/20/2017 15:27:54.402

Terminating an active agency can be done by either the Principal or Agent at any time during the duration of an agency by selecting the “Terminate” button.

SystemTest Build: 8.24.02 Login: TSTDIANA123

Agency Detail

7/27/2017 3:15:10 PM CDT

Retrieve Clear Renew **Terminate** Submit

*Prncpl Svc Req Name DEF GAS CC x Prncpl Svc Req Entity Name DEF GAS COMPANY Agcy Eff From Date 07/27/2017 Next Review Date 07/27/2018

*Agent Svc Req Name CAMP ENERGY Agent Svc Req Entity Name CAMP ENERGY LLC Agcy Eff Thru Date 01/01/2200 Status ACCEPTED

Service Provider TEXAS EASTERN Effective Date 07/27/2017

Options & Contacts Roles Role Specifics

Show: Effective/Future All

Access Options

Eff From Date	Eff Thru Date	Authorize Agent to be Local Security Admin?	Allow Agent's Affiliates to Access Principal's data?	Allow Agent to view prior data?	Allow Principal to keep update rights?	Termination TS
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This option appears in the Agency List and Agency Detail screens. This will send a notice to all parties regarding the termination.

- General
 - GT&C Section 2 – Electronic Communications
 - Specific
 - GT&C Section 2.1 – System Description
 - GT&C Section 2.5 – Local Security Administrators
 - GT&C Section 2.6 – Authorized Use of LINK® System; Confidentiality
 - GT&C Section 2.7 – LINK® System Subscriber; Affiliated Companies
 - GT&C Section 2.8 - LINK® System Subscriber; Agency
 - GT&C Section 2.9 - Liability