

Alberta System NrG Dovetail Invoice Management Administrator Guide



Quick Reference Cards

Access Agent Management

Before you begin

You must have Administrator level access on the NrG Highway system

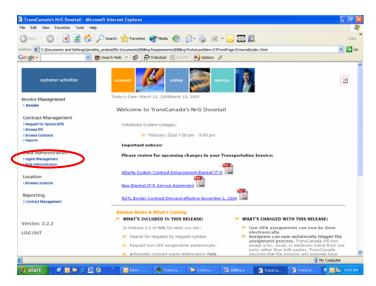
A note about the Administrator Role

TransCanada assigns the Administrator Role to one user in each company. Contact our support line for more information.

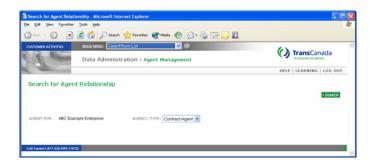
Agent Management is used to:

- Create an Invoice Agent Relationship to send your invoices automatically to a specified agent company
- Enable the specified agent company to view your invoices through the Download Invoice functionality

1. Login to NrG Dovetail and select Agent Management under the Data Administration heading.



If you cannot see the Agent Management option, you do not have sufficient access to complete this task. Please call the TransCanada support line for more information. The initial agent management screen is displayed.



2. Select Invoice Agent in Agency Type. Click <SEARCH>.

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AGENT FOR: ABC EX	ample Enterprise AGENCY TYPE: [Invoice Agent V Control Agent Invoice Agent	
Call Centre1.877.920.PIPE (7	673)	
		×

- An invoice agent assignment can be effective only on the 1st day of a given month and cannot be set to a past date. Invoice agents expire on the last day of a given month.
- A company can only have one invoice agent at a time

All agent relationships (current and expired) for the selected company are shown. If the results list is blank, there are no agent relationships for the company.

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You have now entered the Invoice Agent Management area. From this screen you can create, modify and delete Invoice Agents.

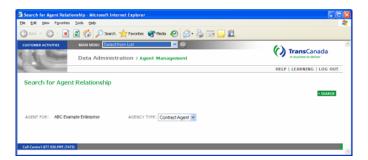
Quick Reference Cards

Search for Invoice Agent Relationship

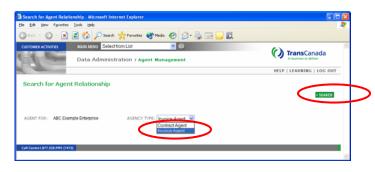
Before you begin

You must have Administrator level access on the NrG Highway system

1. Login to NrG Dovetail and access Agent Management.



2. Select Invoice Agent in Agency Type. Click <SEARCH>.



The Invoice Agent Relationship results screen displays current and past agents for the selected company, if any exist.

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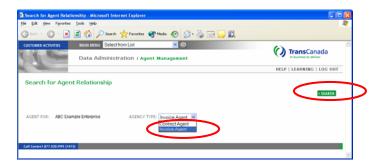
Quick Reference Cards

Create Invoice Agent Relationship

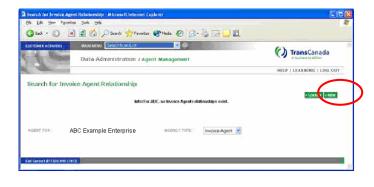
Before you begin

You must have Administrator level access on the NrG Highway system

1. Login to NrG Dovetail and Access Agent Management. Select "Invoice Agent" in Agency Type and click <SEARCH>.



2. The results window will either display existing and expired agents, or will show a message indicating that none exist. Select <NEW>.



3. Enter Agent mnemonic and length of relationship by adjusting Billing Period Effective Date and Billing Period Expiry Date. Select <SUBMIT>.

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If your new agent relationship overlaps an existing one, you will get the following warning message:

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?	Warning: Future Agency Relationship(s) will be removed, select OK to	continue.
	OK Cancel	

Click <OK>

4. You will see a confirmation that the agent has been created along with a new line in the results list.

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About Agent Creation

Because a company can only have one active agent at a time, you must expire any existing agents before you create a new agent.

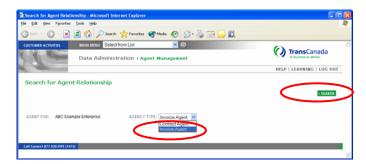
Quick Reference Cards

Modify Invoice Agent Relationship

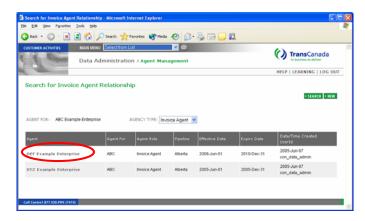
Before you begin

You must have Administrator level access on the NrG Highway system

1. Login to NrG Dovetail and access Agent Management. Select "Invoice Agent" in Agency Type and click <SEARCH>.



2. Select the Agent Relationship you wish to modify.



3. Make changes to data and click <SUBMIT>.

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You will see a confirmation that your changes have been successfully submitted.

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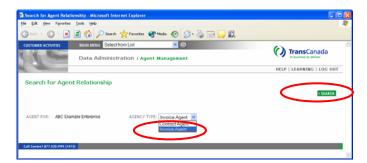
Quick Reference Cards

Delete Invoice Agent Relationship

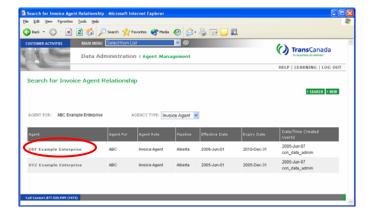
Before you begin

You must have Administrator level access on the NrG Highway system

1. Login to NrG Dovetail and access Agent Management. Select "Invoice Agent" in Agency Type and click <SEARCH>.



2. Select the Agent Relationship you wish to delete. Note: only future agents can be deleted. Current agents must be expired.



3. Click <DELETE>.

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Quick Reference Cards

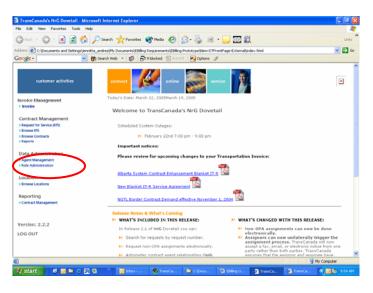
Assign Invoice View to User

Before you begin

- You must have Administrator level access on the NrG Highway system
- The user being assigned Invoice View privileges must have a user ID on the NrG Highway system

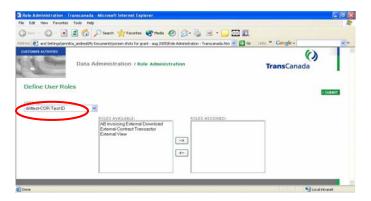
Role Administration is used to identify which parts of the main menu a particular user can see. This function enables users to view and download invoices from E-Billing.

Step 1: Click Data Administration/ Role Administration.



Step 2: Assign role for each user.

Select User from list



Select "AB Invoicing External Download" role and click the right arrow to assign that role to the user.

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3. Click <SUBMIT>.

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You're done! Repeat steps 1 through 3 for each new user.