TIP

Steps for User Security Administrator (USA) to Set Up Oil Forecast Tool (OFT) Edit and Read Only Roles in Petrinex

Jurisdiction	Release/Revision Date	Location of Change in this Document	Comment
AB	February 16, 2021		Initial Release

Audience: All Alberta Petrinex Oil Forecast Tool Users

Purpose: To inform Industry of the steps required by the BA USA to provide users with access to the Oil Forecast Tool functions in Petrinex.

The BA USA must create and then assign the appropriate OFT roles to users within the BA.

Please note these steps are familiar to USA's and are meant to specifically highlight the creation of OFT roles and to assign the roles to the applicable BA users.

To create an "Oil Forecast Edit" role -

1. From the Petrinex Menu select Admin Functions – Security – Manage User Roles.
2. If the Oil Forecast Edit role had previously been created, under Current Roles use the drop down arrow and select "Oil Forecast Edit" and move to Step 4.
3. If creating this role for the first time, click ADD and create a user role called "**Oil Forecast Edit**", Click OK.
4. Click Task List.
5. Scroll down under Template or Role Name and select the template titled Petrinex – Oil Forecast Edit.
6. Select all of the tasks under Available Tasks and move them to Assigned Tasks.
7. Click OK.
8. Click Submit.

To create an "Oil Forecast Read" role -

1. From the Petrinex Menu select Admin Functions – Security – Manage User Roles.
2. If the Oil Forecast Read role had previously been created, under Current Roles use the drop-down arrow and select "Oil Forecast Read" and move to Step 4.
3. If creating this role for the first time, click ADD and create a user role called "**Oil Forecast Edit**", Click OK.
4. Click Task List.

5. Scroll down under Template or Role Name and select the template titled Petrinex – Oil Forecast Read.
6. Select all of the tasks under Available Tasks and move them to Assigned Tasks.
7. Click OK.
8. Click Submit.

Assign the appropriate role to the applicable users -

1. From the Petrinex Menu select Admin Functions – Security – Manage User ID and Access.
2. Type in the User id or use the Select option to locate the user who requires access to the OFT role(s).
3. Under Available Roles select as appropriate the "Oil Forecast Edit" or "Oil Forecast Read" role and move the role to Assigned Roles.
4. Click OK.
5. Click Submit.

More information:

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