Instructions on how to set up new users (traders and administrators) on the Southern Company PRODUCTION webMarket site:

1. Log into the OATI Southern Company webMarket site. (https://www.socowebmkt.oatiwebtms.com) – *Note: this link goes to the PRODUCTION site, not the Development site.*
2. Go to the Administration Tab, then down to User Management, then click on Users.
3. Within the USERS screen you will see your own user entry. Select "New User" to begin setting up a new buyer trader/admin. If your company will be offering MW into the market, then the same instructions can be used to set up a seller trader/admin, simply select the appropriate seller options in place of the buyer options. The Security Role definitions are located at the end of this document.
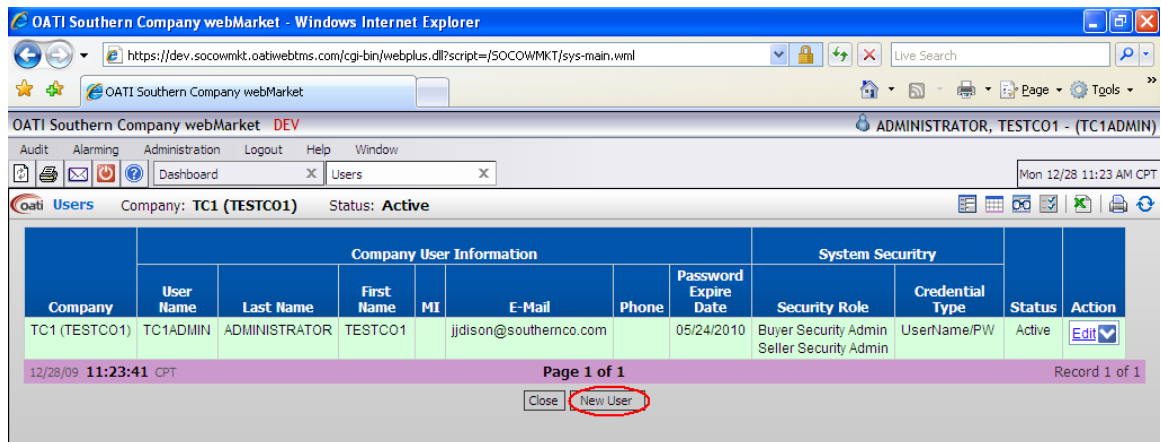
Note: You will need the OATI certificate identifier text to complete the user setup. This identifier text will look something like "*E=useremail@company.com, C=country, S=state, L=location, O=company, OU=code, CN=name.*"

To set up a typical buyer company administrator:

1. User Name: Enter the User Name that the administrator will use to log in to webMarket
2. First Name: The First Name of the administrator. This will be used to differentiate similar administrator UserNames, if needed.
3. Last Name: The Last Name of the administrator. This will be used to differentiate similar administrator UserNames, if needed.
4. Email: The email address used (or accessible by) the administrator. This is the email address where the username and password will be sent automatically by the system.
5. User Comment: Enter any comments needed here.
6. Credential Type: If the administrator has an assigned OATI certificate identifier, please select the "UserName/PW/Cert" option. If the administrator does not have an assigned certificate, use the "UserName/PW" option.

7. Certificate Identifier: If the correct certificate information is available in the pull-down, select it. Otherwise, select the "Enter Certificate Information as Text" option.
8. Manual Cert Identifier: The OATI certificate identifier text. This identifier text will look something like "*E=useremail@company.com, C=country, S=state, L=location, O=company, OU=code, CN=name*."
9. Credential Emails: Select "Yes" if you wish for the system to automatically send the username and password information to the email address listed under step 4.
10. Security Roles Available: To set up a buyer company administrator, double-click the "Buyer Company Admin" option (or click the "Buyer Company Admin" option and then the top (single, right-pointing) arrow)). *– Note: The other Security Role definitions are listed at the end of this document.*
11. Enter Button: Once you are ready to create the user, click the enter button. This will automatically trigger the system to send out the username and password emails if selected under step 9.

To set up a typical buyer trader:

12. User Name: Enter the User Name that the trader will use to log in to webMarket
13. First Name: The First Name of the trader. This will be used to differentiate similar trader UserNames, if needed.
14. Last Name: The Last Name of the trader. This will be used to differentiate similar trader UserNames, if needed.
15. Email: The email address used (or accessible by) the trader. This is the email address where the username and password will be sent automatically by the system.
16. User Comment: Enter any comments needed here.
17. Credential Type: If the trader has an assigned OATI certificate identifier, please select the "UserName/PW/Cert" option. If the trader does not have an assigned certificate, use the "UserName/PW" option.

18. Certificate Identifier: If the correct certificate information is available in the pull-down, select it. Otherwise, select the "Enter Certificate Information as Text" option.
19. Manual Cert Identifier: The OATI certificate identifier text. This identifier text will look something like "*E=useremail@company.com, C=country, S=state, L=location, O=company, OU=code, CN=name*."
20. Credential Emails: Select "Yes" if you wish for the system to automatically send the username and password information to the email address listed under step 4.
21. Security Roles Available: To set up a buyer trader, double-click the "Buyer Trader" option (or click the "Buyer Trader" option and then the top (single, right-pointing) arrow)). – *Note: The other Security Role definitions are listed at the end of this document.*
22. Enter Button: Once you are ready to create the user, click the enter button. This will automatically trigger the system to send out the username and password emails if selected under step 9.

To set up credit limits for companies (SELLER COMPANY ADMIN ONLY).

1. The Seller Company Admin is responsible for setting up credit limits for all companies. These credit limits must be kept reasonably up to date because the webMarket system decrements credit for matched transactions – the default credit limit is zero.
2. Go to the Operations Tab, then down to Credit Manager.
3. From the Credit Manager window, select the counterparty company you wish to assign credit to. This will open an "Adjust Credit Limit" window.
4. At the bottom of the "Adjust Credit Limit" window, you can enter a new credit limit (in dollars) for the selected counterparty. Once you enter the new credit limit, select the "Assign New Credit Limit" button.
5. The Audit Trail Button will allow you to see previous limits, as well as the person who made the change to the limit.
6. The "Netting" radio box, when selected, allows the counterparty's credit limit to be the net amount of the Credit limit, the total sales since last credit limit adjustment, and the total purchases since last credit limit adjustment. Netting the credit limit will only allow the adjusted credit limit to go up to, not above, the assigned credit limit.

Security Role Definitions:

1. Buyer Back Office – This Security role will allow limited market clearing information access to the user.

2. Buyer Company Admin – This Security role will allow the user to monitor the auctions, as well as the bids for their company

3. Buyer Security Admin – This Security role will allow the user to create/edit other Buyer-type users for their company.

4. Buyer Trader – This Security role will allow the user to make bids in the SOCO webMarket auctions.

5. Buyer Web Service API – This Security role will allow access via a username to other Web Service interface programs.

6. Seller Back Office – This Security role will allow limited market clearing information access to the user.

7. Seller Company Admin – This Security role will allow the user to monitor the auctions, as well as the offers for their company. They can also change/update credit limits for their company.

8. Seller Security Admin – This Security role will allow the user to create/edit other Seller-type users for their company.

9. Seller Trader – This Security role will allow the user to make offers in the SOCO webMarket auctions.

10. Seller Web Service API - This Security role will allow access via a username to other Web Service interface programs.