



# User Preferences

Training Module

This guide will assist users with the functionality of “Preferences”.



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## Important Information – Please Read

The information provided herein is for informational purposes only and does not modify any provision in Transco’s FERC Gas Tariff. If a conflict exists between this information and Transco’s FERC Gas Tariff, the provisions in Transco’s FERC Gas Tariff apply. Transco makes no representation or warranty as to the completeness or accuracy of this information. Transco shall not be liable for any informational errors, incompleteness or delays, or for any actions taken in reliance on this information.

To review the tariff language specific to any topic, go to [Transco’s Informational Postings page](#), and select **Tariff** from the left hand navigation menu.

## Introduction

**Preset Default Tabs** – Preset up to 7 tabs to automatically open when you log in. To set your default tabs, top navigation > Tools > My Preferences.

**Preset Filter & Data Configuration Preference** – Nine highly used pages have been selected for additional user preference settings. On these pages you will be able to set defaults for dates, filters, and indicators by clicking “Preset Filters” next to the Actions Menu. Also within the data table, you can set the order of the columns and sort order of the data by clicking “Data Configuration Icon “

**The pages introducing user preferences are:**

1. Retrieve Nominations
2. Pool Balancing Summary
3. View Supply Disagg Summary
4. PDA
5. Confirmations
6. Review/Select Scheduling Run – Contract View
7. LDC Quick View
8. Allocated Quantities
9. Monthly Summary
10. Offers\*
11. Bids\*

*\*Column order and column sorting preferences not available on these pages at this time.*

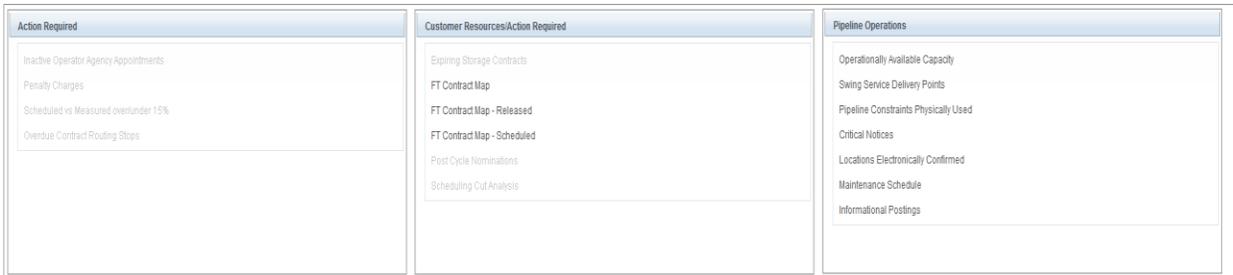
**The default date filter allows the user to collect from the following options:**

- Current Date
- Next Day
- Previous Day
- First Day of the Month
- Last Day of the Month
- Day of Week (Friday can be selected for the Begin Date and Sunday for the End Date if user is interested in only Weekend Activities)
  - Monday
  - Tuesday
  - Wednesday
  - Thursday
  - Friday
  - Saturday
  - Sunday

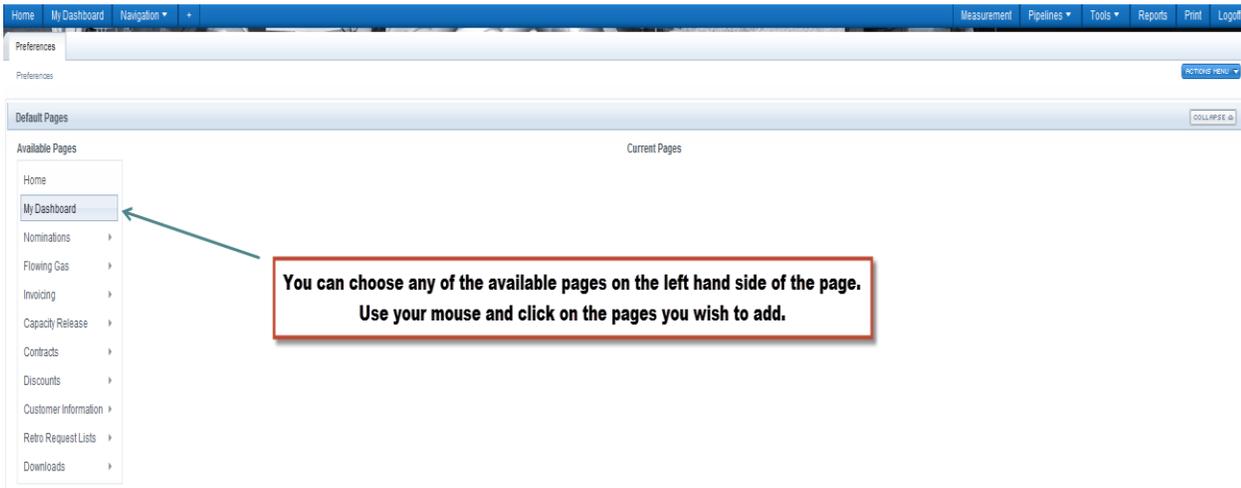
# Preset Default Tabs Preference

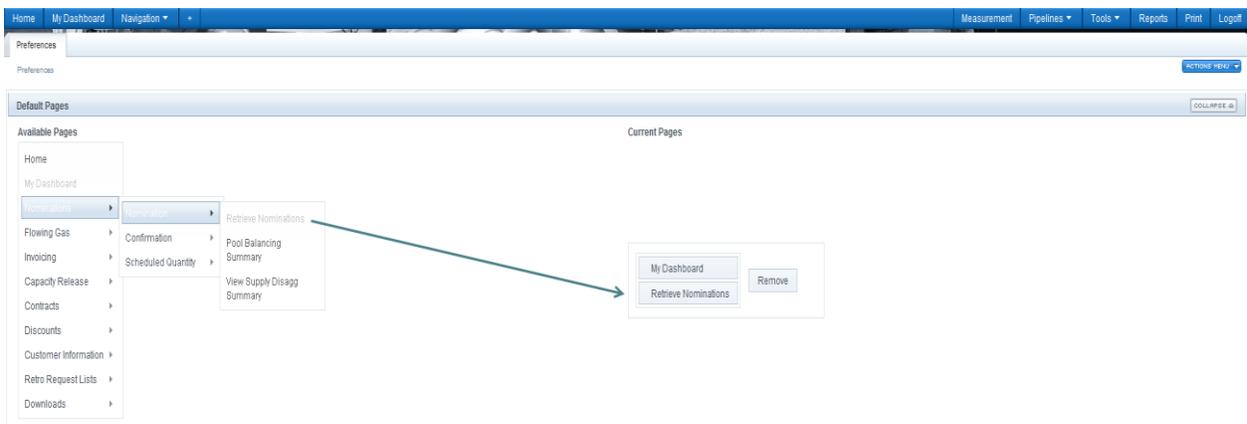
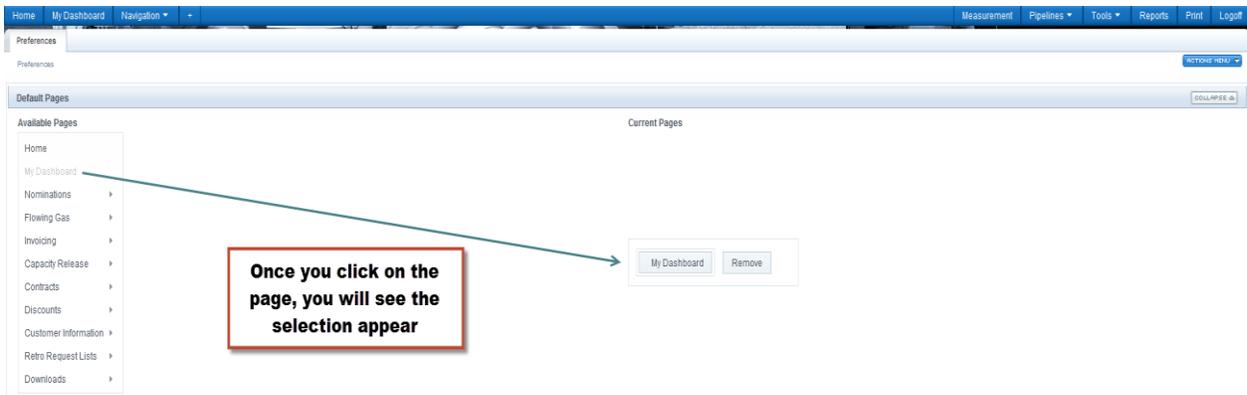
In order to Set Preset Default Tabs:

1. Click on Tools
2. Select Preferences



Default tabs are available on the left hand side of the page; the pages displayed are dependent on the Security Roles that were assigned by your SSA.

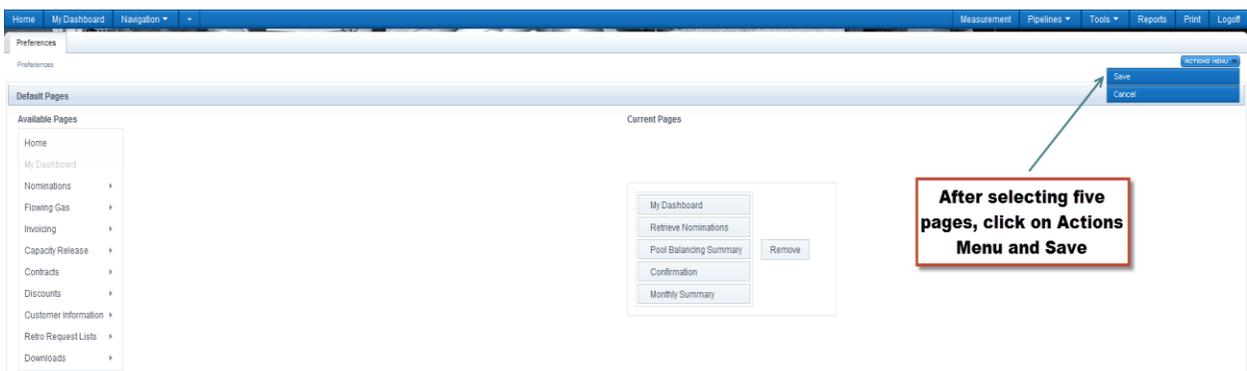




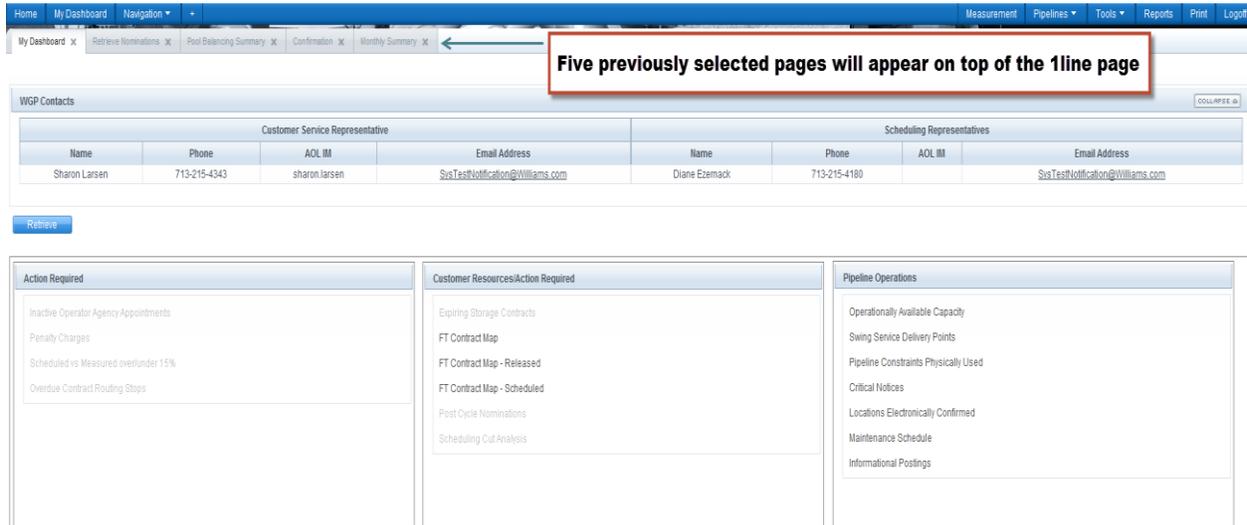
To remove selections, select the page in the Current Pages section and then select the Remove action button.

You can rearrange the order of selected pages by selecting the page in the Current Pages section and then move up or down to your preferred order.

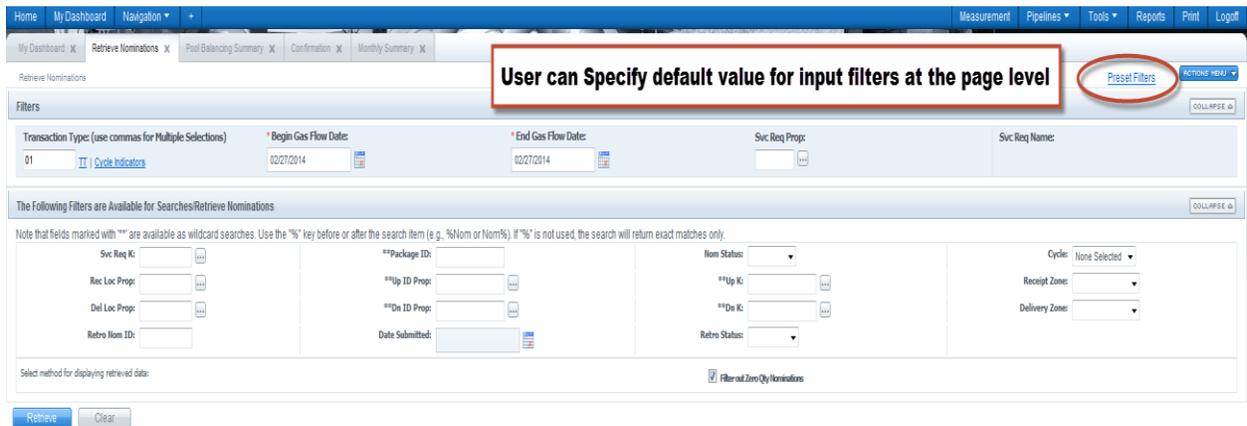
Select: **Actions Menu > Save** this will save your preference tabs and the order you want them to be displayed.



Once you saved the preference, the **next time** you log back into 1line, the five preference tabs will appear on top of the page.



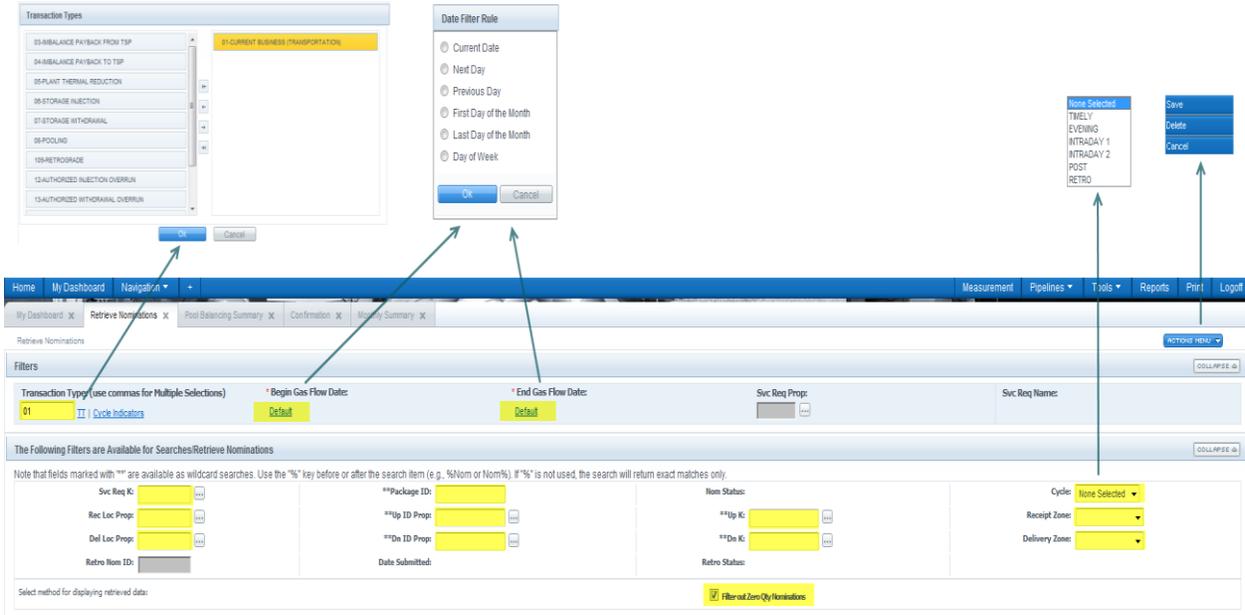
## Preset Filter Preference - Retrieve Nominations



Once you select on Preset Filter, you can set up filter(s) on any of the following or highlighted options:

1. Transaction types
2. Begin and end flow date
3. Svc Req K
4. Rec and Del Loc

5. Package ID
6. Up and Dn ID Prop
7. UP K and Dn K
8. Cycle
9. Rec and Del Zone
10. Filter out Zero Qty Nominations



Select: **Actions Menu > Save, Delete or Cancel**

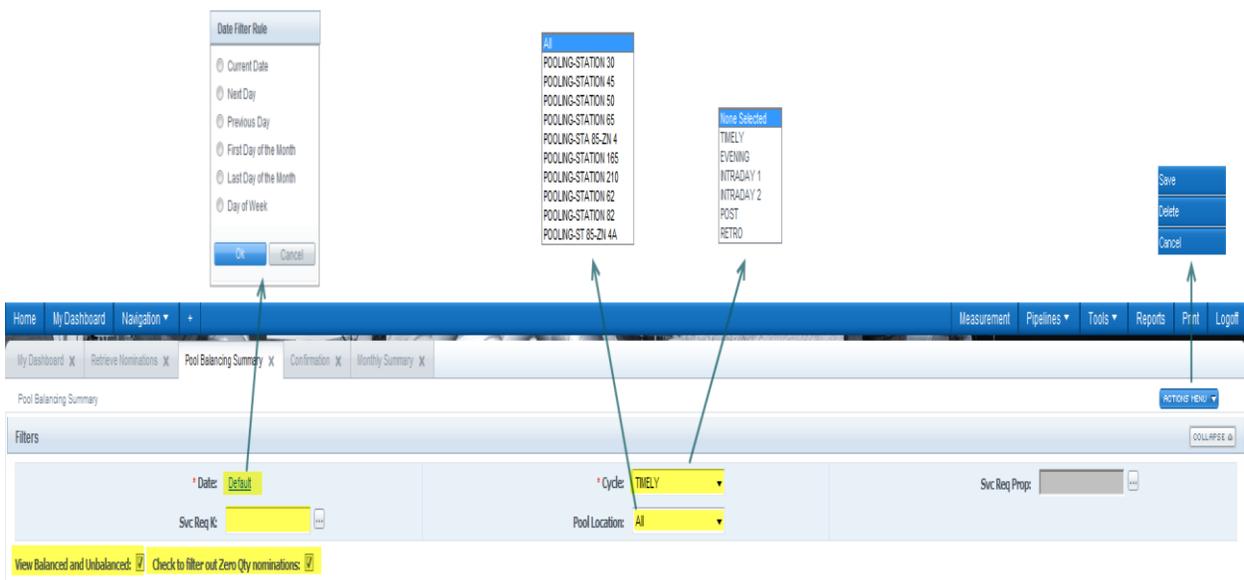
Select Delete to go back to original default dates, or Cancel if you have saved previous preset filters and don't want to keep the current changes.

# Preset Filter Preference - Pool Balancing Summary



Once you **Select Preset Filter**, you can set up filter(s) on any of the following or highlighted options:

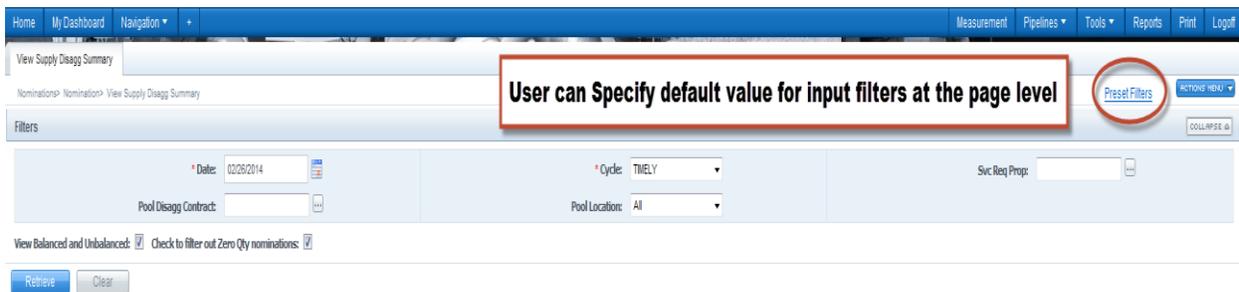
1. Date
2. Cycle
3. Svc Req K
4. Pool Locations
5. View Balanced and Unbalanced
6. Filter out Zero Qty Nominations



Select: **Actions Menu > Save, Delete or Cancel**

Select Delete to go back to original default dates, or Cancel if you have saved previous preset filters and don't want to keep the current changes.

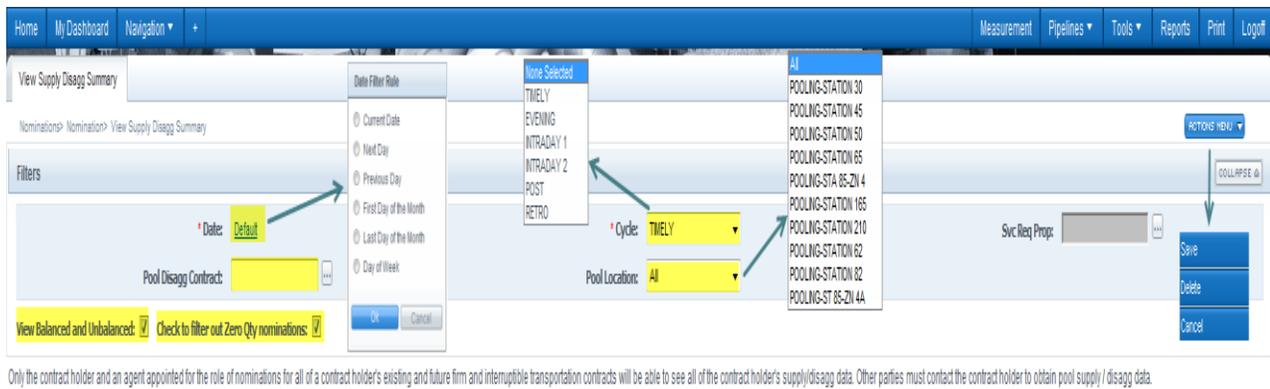
# Preset Filter Preference - View Supply Disagg Summary



Only the contract holder and an agent appointed for the role of nominations for all of a contract holder's existing and future firm and interruptible transportation contracts will be able to see all of the contract holder's supply/disagg data. Other parties must contact the contract holder to obtain pool supply / disagg data.

Once you **Select Preset Filter**, you can set up filter(s) on any of the following or highlighted options:

1. Date
2. Cycle
3. Pool Disagg Contract
4. Pool Locations
5. View Balanced and Unbalanced
6. Filter out Zero Qty Nominations

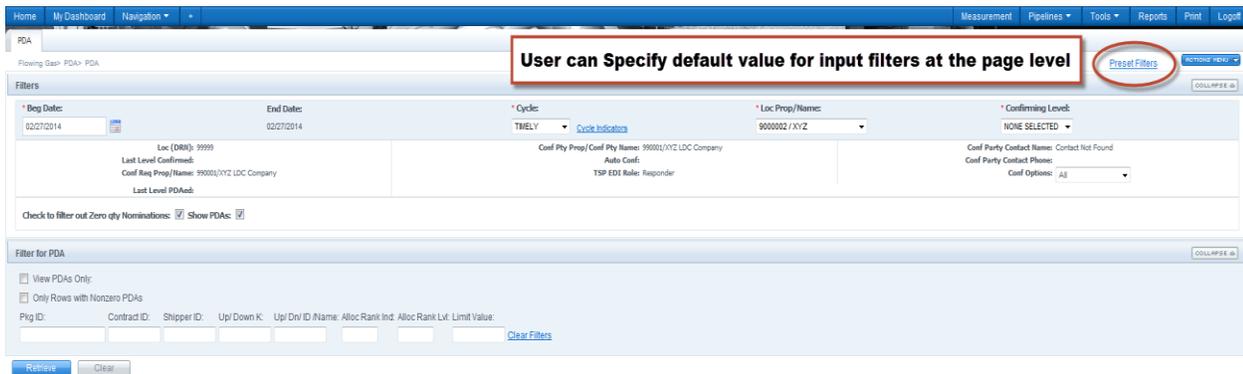


Only the contract holder and an agent appointed for the role of nominations for all of a contract holder's existing and future firm and interruptible transportation contracts will be able to see all of the contract holder's supply/disagg data. Other parties must contact the contract holder to obtain pool supply / disagg data.

Select: **Actions Menu > Save, Delete or Cancel**

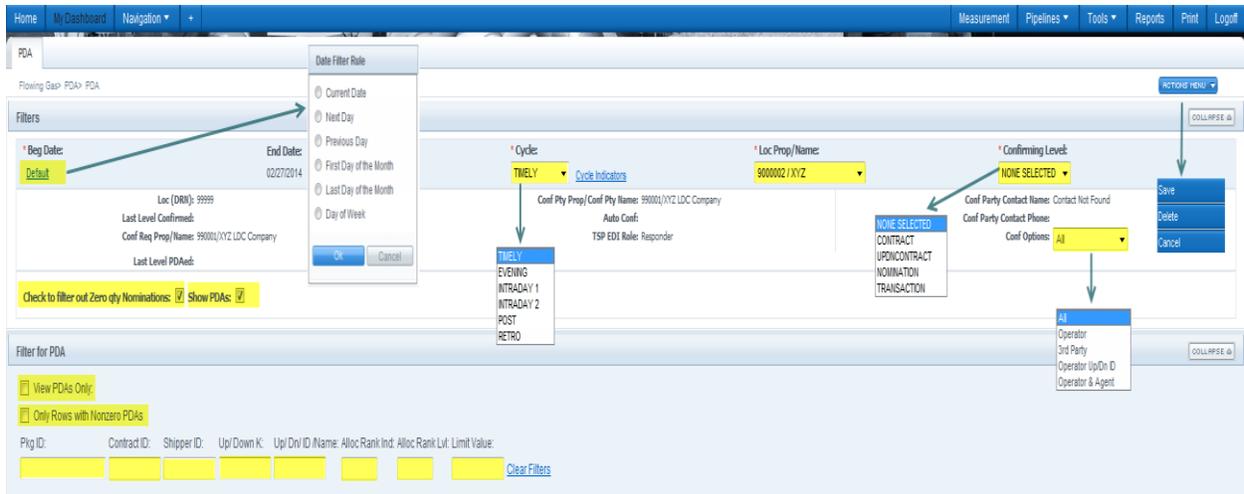
Select Delete to go back to original default dates, or Cancel if you have saved previous preset filters and don't want to keep the current changes.

# Preset Filter Preference - PDA



Once you **Select Preset Filter**, you can set up filter(s) on any of the following or highlighted options:

1. Beg Date
2. Cycle
3. Loc Prop/Name
4. Confirming Level
5. Conf Options
6. Filter out Zero Qty Nominations
7. Show PDAs
8. View PDAs only
9. Only Rows with Nonzero PDAs
10. Pkg ID
11. Contract ID
12. Shipper ID
13. Up/Down K
14. Up/Dn/Name
15. Alloc Rank Ind
16. Alloc Rank Lvl
17. Limit Value



Select: **Actions Menu > Save, Delete or Cancel**

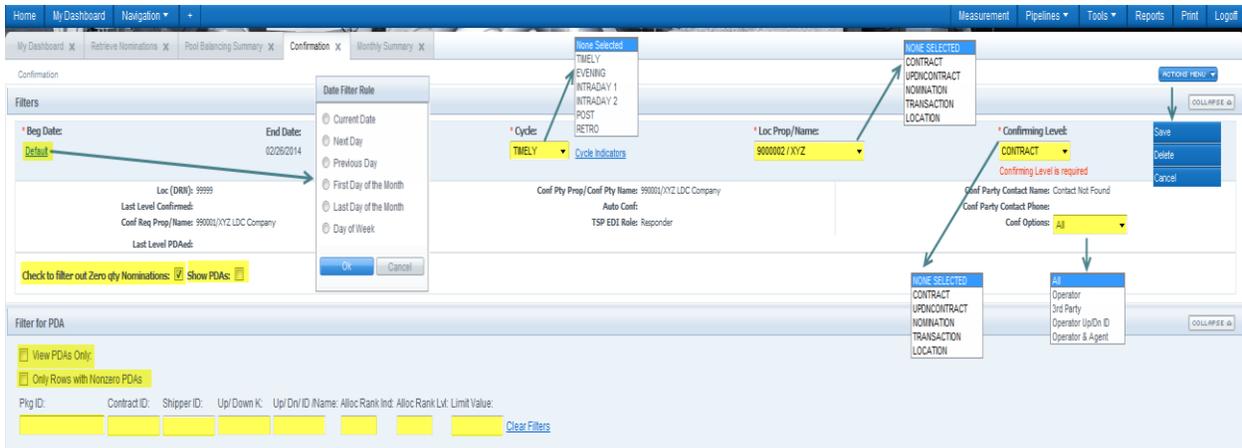
Select Delete to go back to original default dates, or Cancel if you have saved previous preset filters and don't want to keep the current changes.

## Preset Filter Preference – Confirmations

The screenshot shows a web application interface with a navigation bar at the top containing 'Home', 'My Dashboard', 'Navigation', 'Measurement', 'Pipelines', 'Tools', 'Reports', 'Print', and 'Logout'. Below the navigation bar, there are several tabs: 'My Dashboard', 'Retrieve Nominations', 'Pool Balancing Summary', 'Confirmation', and 'Monthly Summary'. The 'Confirmation' tab is active. A red box highlights the text 'User can Specify default value for input filters at the page level' and a red circle highlights the 'Preset Filters' button. The main content area is titled 'Filters' and contains several input fields: 'Beg Date' (02/26/2014), 'End Date' (02/26/2014), 'Cycle' (TIMELY), 'Loc Prop/Name' (9000002 / XYZ), and 'Confirming Level' (CONTRACT). Below these fields, there are sections for 'Last Level Confirmed', 'Conf Req Prop/Name', 'Last Level PDA#', 'Conf Pky Prop/Conf Pky Name', 'Auto Conf', 'TSP EDI Role', 'Conf Party Contact Name', 'Conf Party Contact Phones', and 'Conf Options'. At the bottom, there is a 'Filter for PDA' section with 'Retrieve' and 'Clear' buttons.

Once you **Select Preset Filter**, you can set up filter(s) on any of the following or highlighted options:

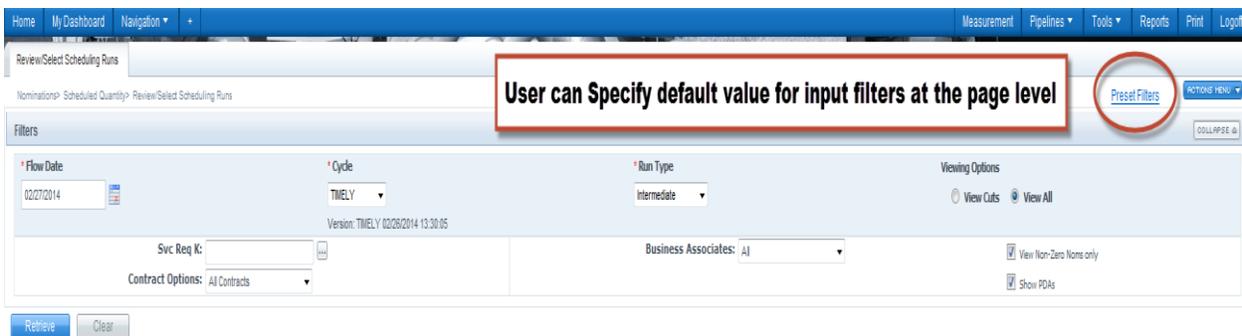
1. Beg Date
2. Cycle
3. Loc Prop/Name
4. Confirmation Level
5. Conf Options
6. Filter out Zero Qty Nominations
7. Show PDAs
8. View PDAs Only
9. Only Rows with Nonzero PDAs
10. Pkg ID
11. Contract ID
12. Shipper ID
13. Up/Down K
14. Up/Dn/Id/Name
15. Alloc Rank Ind
16. Alloc Rank Lev
17. Limit Value



Select: **Actions Menu > Save, Delete or Cancel**

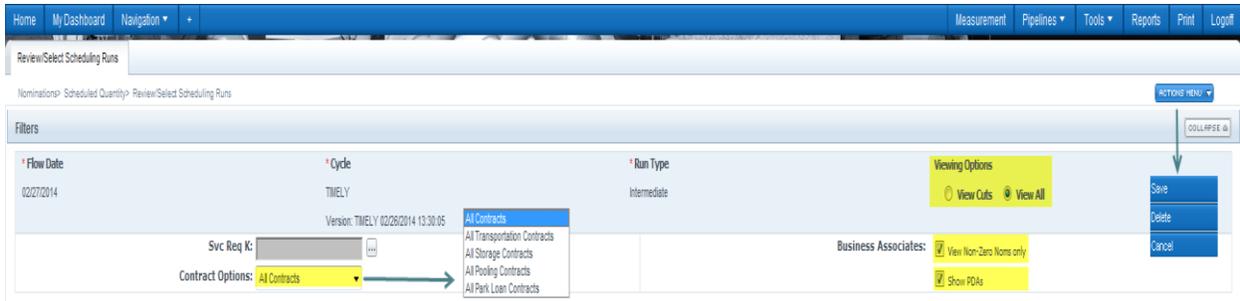
Select Delete to go back to original default dates, or Cancel if you have saved previous preset filters and don't want to keep the current changes.

## Preset Filter Preference - Review/Scheduling Runs



Once you **Select Preset Filter**, you can set up filter(s) on any of the following or highlighted options:

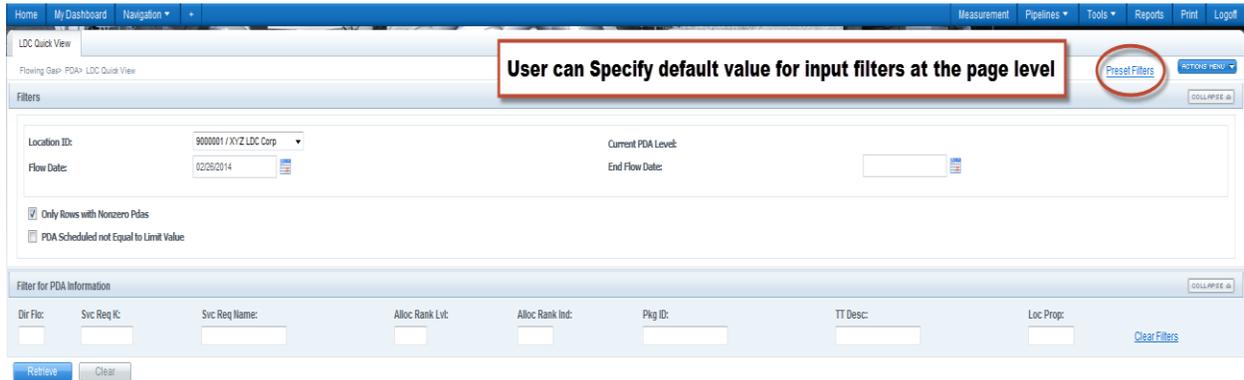
1. Contract Options
2. View Options
3. View Non-Zero noms Only
4. Show PDAs



Select: **Actions Menu > Save, Delete or Cancel**

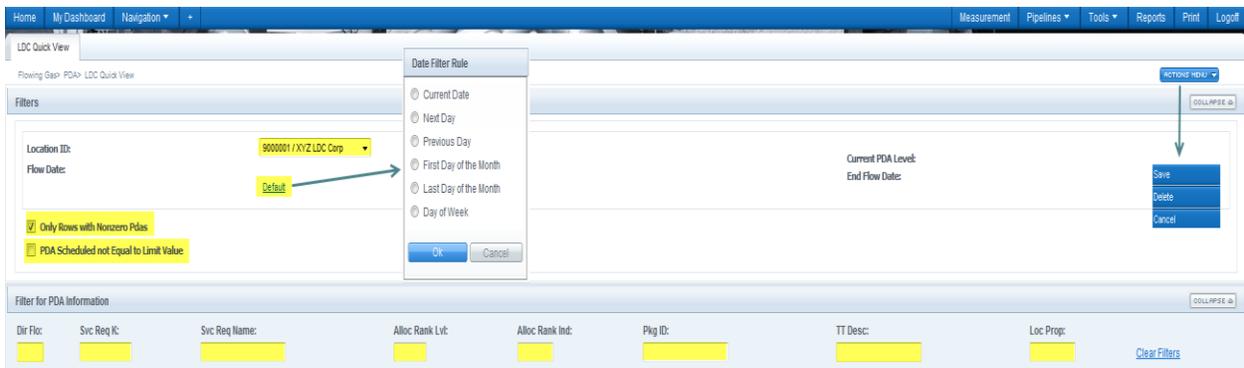
Select Delete to go back to original default dates, or Cancel if you have saved previous preset filters and don't want to keep the current changes.

# Preset Filter Preference - LDC Quick View



Once you **Select Preset Filter**, you can set up filter on any of the following or highlighted options:

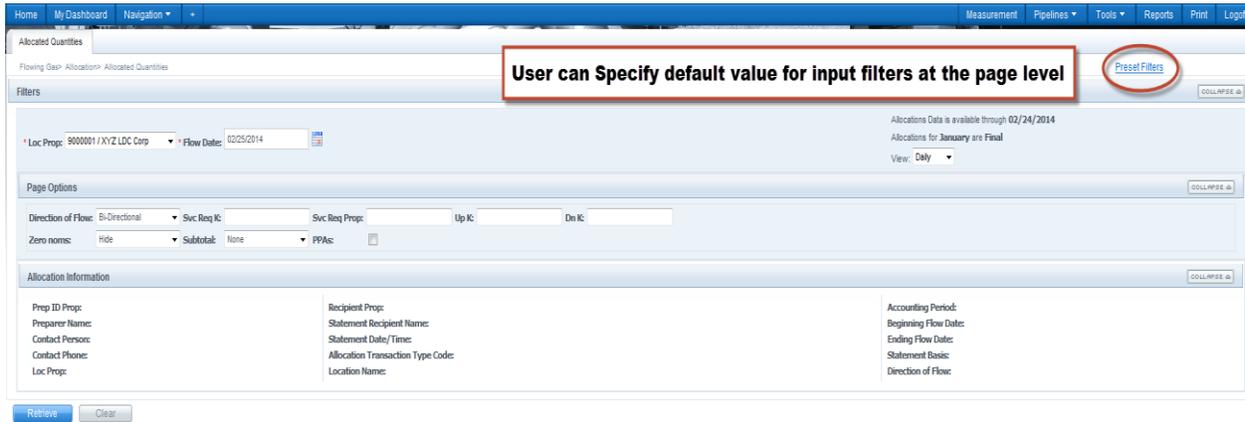
1. Location ID
2. Flow Date
3. Only Rows with Nonzero Pdas
4. PDA Scheduled not Equal to Limit Value
5. Dir Flo
6. Svc Req K
7. Svc Req Name
8. Alloc Rank Lev
9. Alloc Rank Ind
10. Pkg ID
11. TT Desc
12. Loc Prop



Select: **Actions Menu > Save, Delete or Cancel**

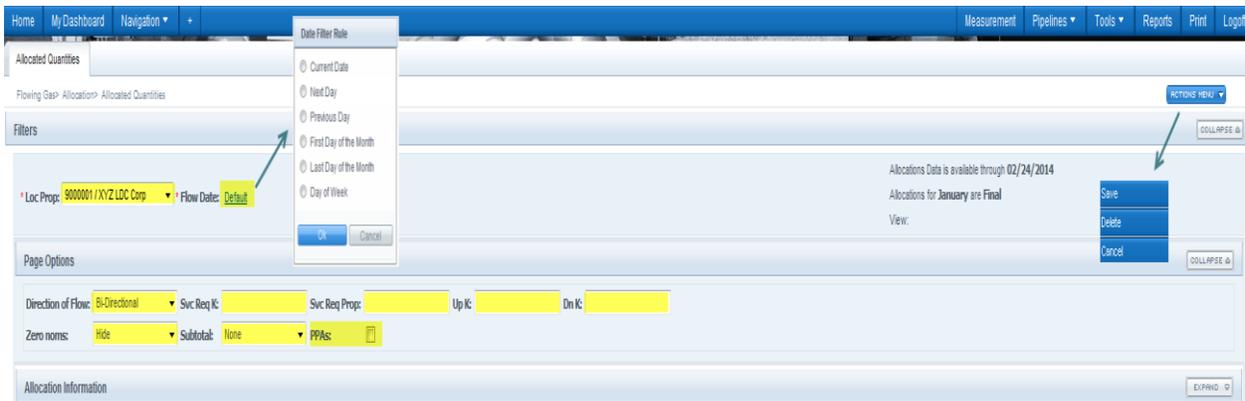
Select Delete to go back to original default dates, or Cancel if you have saved previous preset filters and don't want to keep the current changes.

# Preset Filter Preference - Allocated Quantities



Once you **Select Preset Filter**, you can set up filter(s) on any of the following or highlighted options:

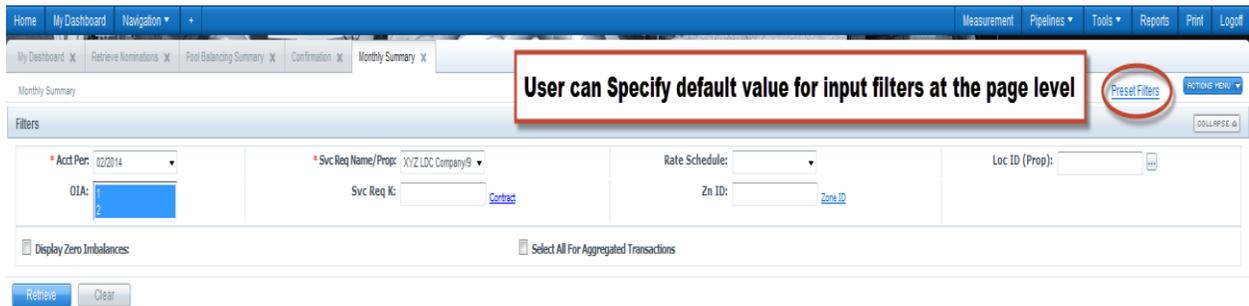
1. Loc Prop
2. Flow Date
3. Direction of Flow
4. Svc Req K
5. Svc Req Prop
6. Up K
7. Dn K
8. Zero Noms
9. Subtotal
10. PPAs



Select: **Actions Menu > Save, Delete or Cancel**

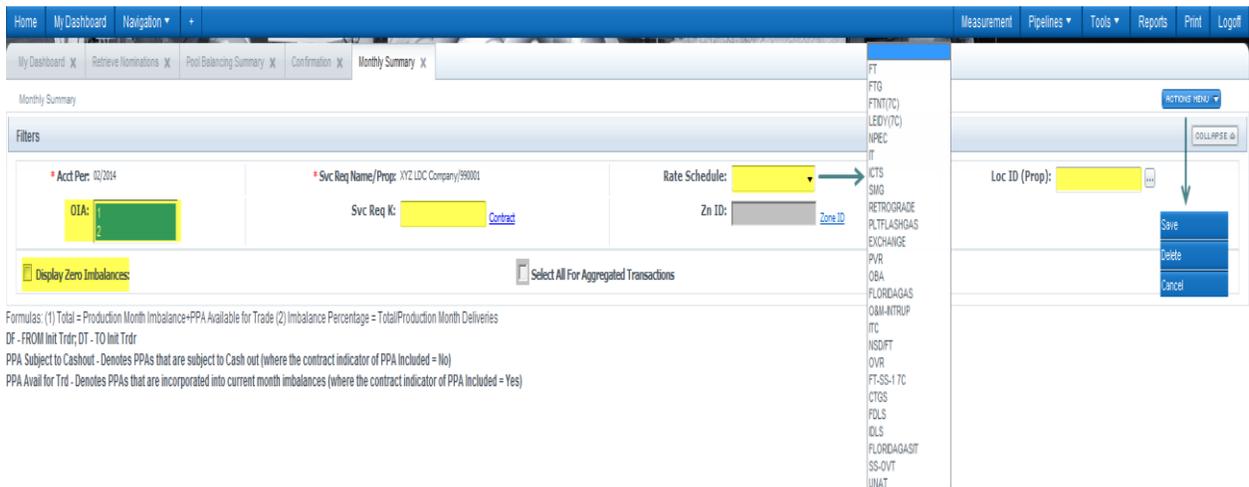
Select Delete to go back to original default dates, or Cancel if you have saved previous preset filters and don't want to keep the current changes.

# Preset Filter Preference - Monthly Summary Page



Once you click on **Preset Filter**, you can set up filter(s) on any of the following or highlighted options:

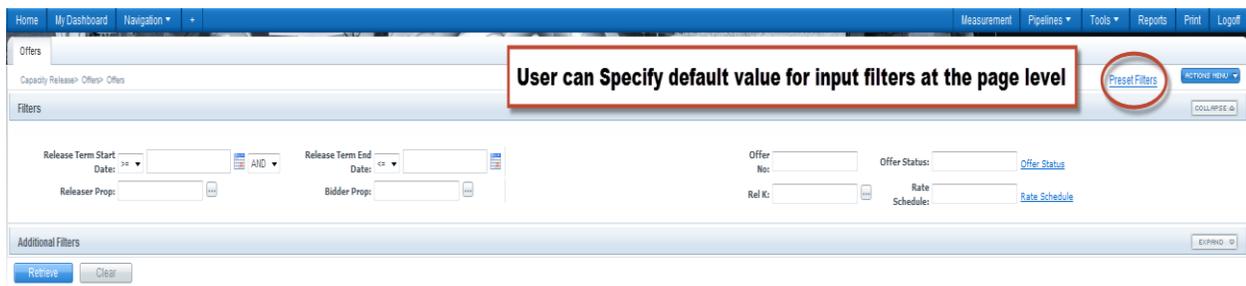
1. OIA
2. Svc Req K
3. Rate Schedule
4. Loc ID (Prop)
5. Display Zero Imbalance



Select: **Actions Menu > Save, Delete or Cancel**

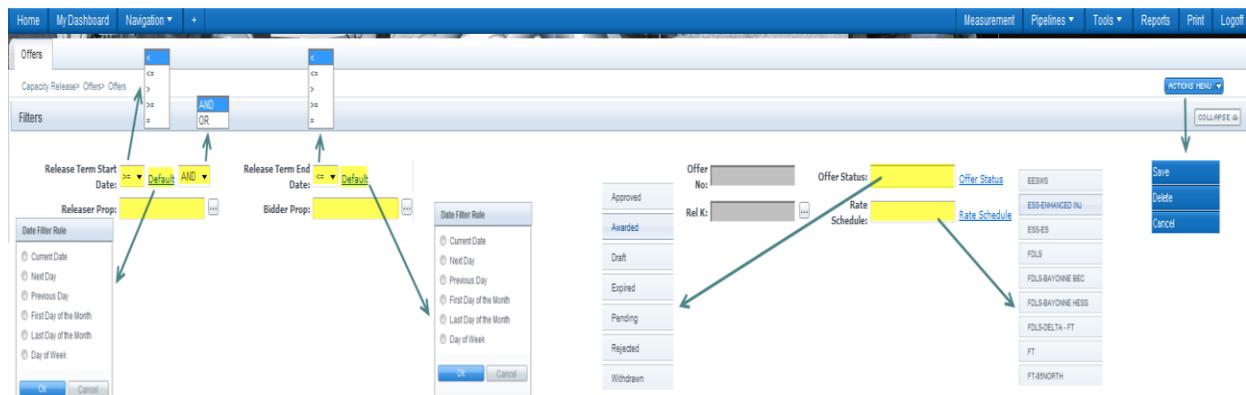
Select Delete to go back to original default dates, or Cancel if you have saved previous preset filters and don't want to keep the current changes.

## Preset Filter Preference – Offers



Once you **Select Preset Filter**, you can set up filter(s) on any of the following or highlighted options:

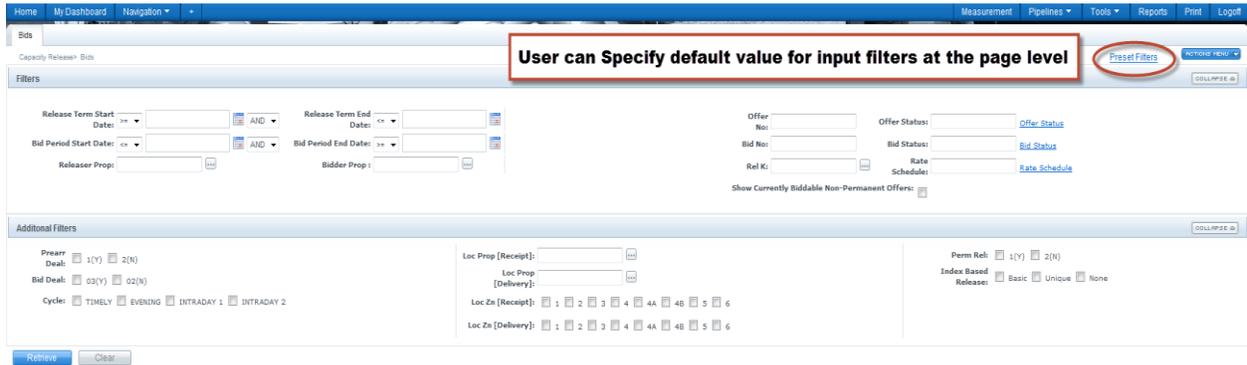
1. Release Term Start Date
2. Release Term End Date
3. Releaser Prop
4. Bidder Prop
5. Offer Status
6. Rate Schedule



Select: **Actions Menu > Save, Delete or Cancel**

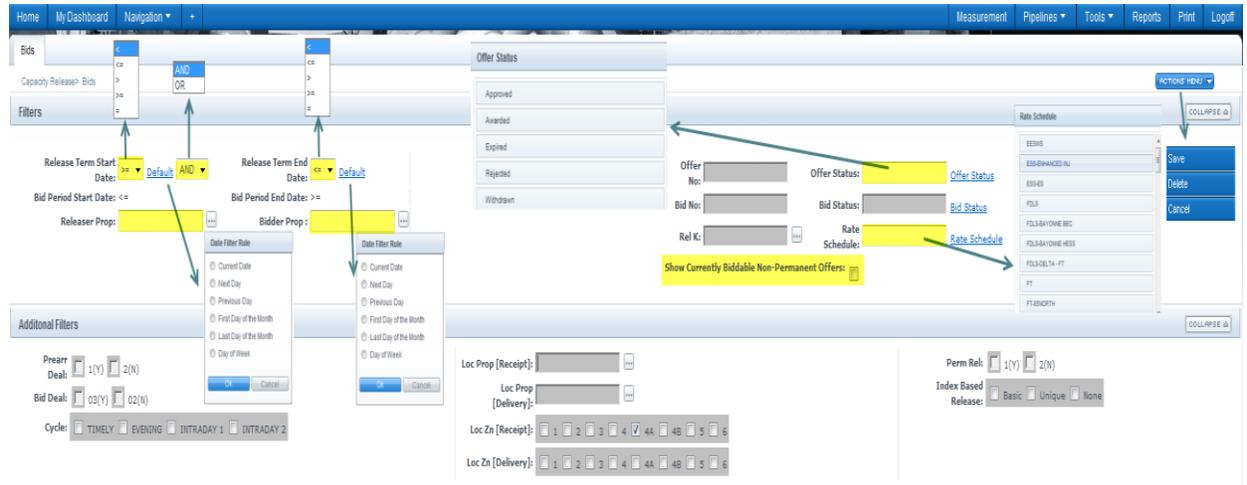
Select Delete to go back to original default dates, or Cancel if you have saved previous preset filters and don't want to keep the current changes.

# Preset Filter Preference – Bids



Once you **Select Preset Filter**, you can set up filter on any of the following or highlighted options:

1. Release Term Start Date
2. Release Term End Date
3. Releaser Prop
4. Bidder Prop
5. Offer Status
6. Rate Schedule
7. Show Currently Biddable Non-Permanent Offers
8. Cycle
9. Loc Zn Receipt
10. Loc Zn Delivery
11. Index Based Release



Select: **Actions Menu > Save, Delete or Cancel**

Select Delete to go back to original default dates, or Cancel if you have saved previous preset filters and don't want to keep the current changes.

# Data Configuration Preference

**Click on the Data Configuration Icon to rearrange columns and filters**

Retro Status	Beg Date	Svc Req K	TT	1	Rec Rank	Rec Loc Prop	Up K	Del Loc Prop	On K	Nom Status			
Retro Request ID	End Date	Svc Req Name	Cycle	Del Rank	Package ID	Rec Loc Name	Rec Qty	Fuel %	Up ID Prop-Name	Del Loc Name	Del Qty	On ID Prop-Name	Error
	02/27/2014	3000030	01	999	TEST 1	1000065	100	0.28	3000037	1000105	100	3000037	Submitted
	02/27/2014	XYZ.LDC Company	TWELLY	999		POOLING			990001 - XYZ.LDC	POOLING		990001 - XYZ.LDC	N
	02/27/2014	3000034	01	1	TEST 2	1006161	200	0.49	3000034	1000178	199	3000037	Submitted
	02/27/2014	XYZ.LDC Company	TWELLY	1		LEDV-D			990001 - XYZ.LDC	POOLING		990001 -	N

A list of your columns will pop up in its current order.

Reset to original settings

Exit and cancel changes

Apply changes

**Column Settings**

🗑️
✖️
✅

Order	Name	Sort
1	Nom Status	↑
	Error	
2	Retro Status	↑
	Retro Request ID	
3	Svc Req K	↑
	Svc Req Name	
	Beg Date	
	End Date	
	TT	
	Cycle	
	Package ID	
	Rec Loc Prop	
	Rec Loc Name	
	Rec Qty	
	Fuel %	

Click and hold, drag mouse up or down to rearrange order

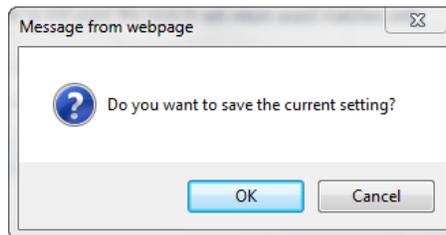
Click and press Ctrl key on your keyboard on the up or down arrow to sort multiple columns

What it looks like after rearranging the top three columns:

**After rearranging the top three columns**



A message will pop up after you click the  (check button), make sure to save current setting and click on "OK"



You will see the new column order and filter setting

**New column order and filter setting**

Svc Req K	Retro Status	Nom Status	Beg Date	TT	Package ID	Rec Loc Prop	Rec Qty	Fuel %	Up K	Rec Rank	Del Loc Prop	Del Qty	Dn K
Svc Req Name	Retro Request ID	Error	End Date	Cycle	Rec Loc Name	Rec Qty	Fuel %	Up ID Prop-Name	Del Rank	Del Loc Name	Del Qty	Dn ID Prop-Name	
3000030		Submitted	02/27/2014	01	TEST 1	1000065	100	0.28	3000037	999	1000105	100	3000037
XYZ LDC Company		N	02/27/2014	TIMELY	POOLING				990001 - XYZ LDC	999	POOLING		990001 - XYZ LDC
3000034		Submitted	02/27/2014	01	TEST 2	1006161	200	0.49	3000034	1	1000178	199	3000037
XYZ LDC Company		N	02/27/2014	TIMELY	LEDY-D				990001 - XYZ LDC	1	POOLING		99001-

Please apply the same method this to all available pages on data configuration preference.

For Confirmations, PDA or Monthly Summary Page, you can rearrange the order of the entire block; columns could be moved within a block.

The download function for the 3 pages mentioned should be accurate after a user has saved a unique column configuration. The columns and data should match in the download to what is saved as a user preference on the screen.

The screenshot displays a 'Monthly Summary' page for 'February 2014'. The table below shows imbalance data for various rate schedules and service requests. The data is organized into two distinct blocks, 'First Block' and 'Second Block', as indicated by the red boxes and arrow. The 'First Block' includes data for Rate Schedule 'IT' with Svc Req ID '990001' and Svc Req 'XYZ LDC Company', showing a Production Month Imbalance of 60,000 DF. The 'Second Block' includes data for Rate Schedule 'IT' with Svc Req ID '990001' and Svc Req 'XYZ LDC Company', showing a Production Month Imbalance of 55,000 DF. A third block for Rate Schedule 'FT-APEC' is also present.

Imbalance data is available through 02/28/2014												
							February 2014					
Rate Schedule	Svc Req ID	Svc Req	Svc Req K	Loc ID Prop	OIA ID 1	Zn ID 2	Production Month Imbalance	PPA Avail for Trd	Total(1)	PPA Subject to Cashout	Production Month Deliveries/OBA Allocated Qty	Imbalance Pct%(2)
IT	990001	XYZ LDC Company	3000023		1	2	60,000 DF	0	60,000 DF	0	0	100.0
Total by OIA/Zone							60,000 DF	0	60,000 DF	0	0	100.0
IT	990001	XYZ LDC Company	3000023		1	3	55,000 DF	0	55,000 DF	0	0	100.0
Total by OIA/Zone							55,000 DF	0	55,000 DF	0	0	100.0
FT-APEC	990001	XYZ LDC Company	3000031		1	6	60,000 DT	0	60,000 DT	0	0	100.0
Total by OIA/Zone							60,000 DT	0	60,000 DT	0	0	100.0

**Click and hold, drag mouse up or down to rearrange the entire block**

Order	Name	Sort
1		
2	Rate Schedule	
3	Svc Req ID	
4	Svc Req	
5	Svc Req K	
6	Loc ID Prop	
7	OIA ID	1
8	Zn ID	2
9	February 2014	
10	Production Month Imbalan	
11	PPA Avail for Trd	
12	Total(1)	
13	PPA Subject to Cashout	
14	Production Month Deliverie	
15	Imbalance Pct%(2)	

\*For Monthly Summary Page - if a user saves ANY column reorder and/or sorting, the page will not display subtotals by zone.

## User Preferences – Auto Refresh Confirmation/PDA

Auto refresh feature on the Confirmation and PDA pages.

Confirmation

Home My Dashboard Navigation + Measurement Pipelines Tools Reports Print Logout

Nominations > Confirmation > Confirmation

**Click on Preset Filters** Preset Filters ACTIONS MENU COLLAPSE

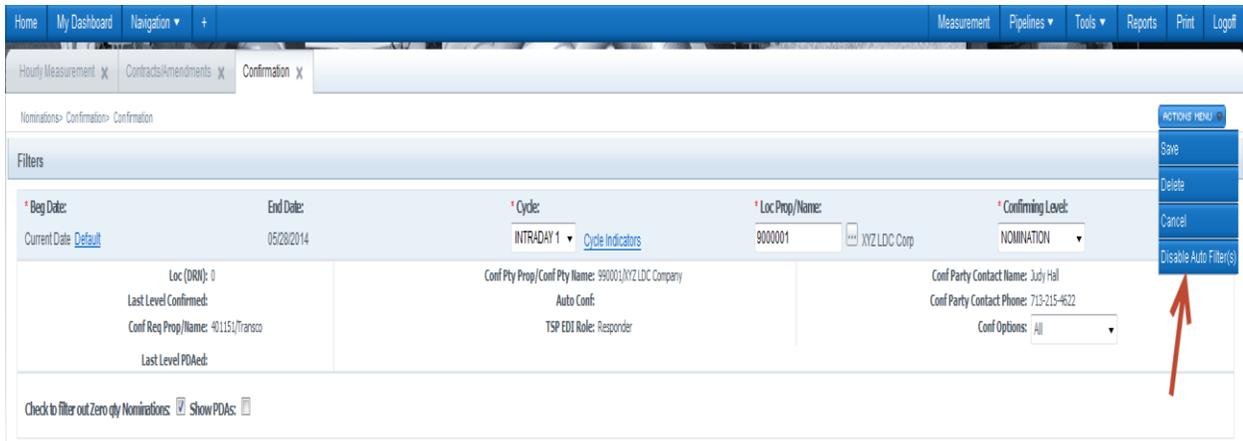
Filters

\* Beg Date: 05/27/2014 End Date: 05/27/2014 \* Cycle: INTRADAY 1 Cycle Indicators \* Loc Prop/Name: 9000001 NYZ LDC Corp \* Confirming Level: NOMINATION

Loc (DRU): 0 Conf Pty Prop/Conf Pty Name: 990001 NYZ LDC Company Conf Party Contact Name: Judy Hill  
 Last Level Confirmed: Auto Conf Conf Party Contact Phone: 713-215-4622  
 Conf Req Prop/Name: 401151 Transco TSP EDI Role: Responder Conf Options: All  
 Last Level PDAd:

Check to filter out Zero qty Nominations:  Show PDAs:

Retrieve Clear



When disabled on Confirmation/PDA Pages, switching between filters (such as date/cycle/location) should not change the other filters. You may still see the “Processing Filter Change” popup, that’s normal. Certain filter validations still need to be done (such as ‘is the location active on this date?’), but the other filters shouldn’t change after changing a filter.

Please contact your Commercial Services Representative with any Preferences questions.