

# **User Preferences**

Training Module

This guide will assist users with the functionality of "Preferences".



# **Table of Contents**

Important Information – Please Read	3
Introduction	4
Preset Default Tabs Preference	5
Preset Filter Preference - Retrieve Nominations	7
Preset Filter Preference - Pool Balancing Summary	9
Preset Filter Preference - View Supply Disagg Summary	10
Preset Filter Preference - PDA	11
Preset Filter Preference – Confirmations	13
Preset Filter Preference - Review/Scheduling Runs	14
Preset Filter Preference - LDC Quick View	16
Preset Filter Preference - Allocated Quantities	17
Preset Filter Preference - Monthly Summary Page	18
Preset Filter Preference – Offers	19
Preset Filter Preference – Bids	20
Data Configuration Preference	21
User Preferences – Auto Refresh Confirmation/PDA	24

### **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 <u>Transco's Informational Postings page</u>, 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)
  - o Monday
  - o Tuesday
  - o Wednesday
  - o Thursday
  - o Friday
  - Saturday
  - o Sunday

### **Preset Default Tabs Preference**

In order to Set Preset Default Tabs:

- 1. Click on Tools
- 2. Select Preferences

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		Customer Service Representa	ive			Sch	eduling Represent	tatives		Upload Help		
Name	Phone	AOL IM	Email Address	Email Address Name		hone	AOL IM		Er	n About		
Sharon Larsen	713-215-4343	sharon.larsen	SysTestNotification@Williams.com	SysTestNotification@Williams.com Diane Ezemack 713-2					SysTestNoti	fication@Willia	ims.com	
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			FT Contract Map			Swing Service	Delivery Points					
Scheduled vs Measured overlu	nder 15%		FT Contract Map - Released			Pipeline Cons	straints Physically (	Jsed				
Overdue Contract Routing Stop			FT Contract Map - Scheduled			Critical Notice	s					
						Locations Ele	ctronically Confirm	ed				
			Scheduling Cut Analysis			Maintenance	Schedule					
						Informational	Postings					

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.

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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.

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Default Pages		Cancel
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My Dashboard		
Nominations +		After colocting five
Flowing Gas	My Dashboard	Arter selecting rive
Invoicing +	Retrieve Nominations	pages, CIICK on Actions
Capacity Release >	Pool Balancing Summary Remove	Menu and Save
Contracts +	Confirmation	
Discounts +	Monthly Summary	
Customer Information >		
Retro Request Lists 🔸		
Downloads +		

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

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		Customer Service Representat	ve			Scheduling Represen	tatives			
Name	Phone	AOL IM	Email Address	Name	Phone	e AOL IM	Email Address			
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	tive Operator Agency Appointments Expiring Storage Contracts					Operationally Available Capacity				
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### **Preset Filter Preference - Retrieve Nominations**

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Ny Dashboard 🗙 Retrieve Nominations 🕉	Pool Balancing Summary 🗙	Confirmation 🗙 Monthly Summary 🗙					
Retrieve Nominations			User can Spe	cify default val	ue for input filte	ers at the page level	
Filters							COLLAPSE &
Transaction Type: (use commas for Mul 01 I   <u>Cycle indicators</u>	tiple Selections) B	egin Gas Flow Date: 127/2014	* End Gas Flow Date: 02/27/2014		Svc Reg Prop:	Svc Req Name:	
The Following Filters are Available for Se	arches Retrieve Nominations	ha "64" kay hafara ar offar tha easrch iliam (a a	RNom or NomR) IF%" is not used the coord	will rahm avort mothae only			COLLAPSE &
Svc Req K:		**Package ID:	, Alivent of Ivent A). If to its not used, the search	Nom Status:	•	Cycle: None Selected 💌	
Rec Loc Prop:		**Up ID Prop:	***	**Up K:		Receipt Zone: 👻	
Del Loc Prop:		**Dn ID Prop:		**Dn K:		Delivery Zone:	
Retro Nom ID:		Date Submitted:		Retro Status:	-		
Select method for displaying retrieved data:				☑ Filter out	tZero Qty Nominations		
Retrieve Clear							

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

Transaction Types	Date Filter Rule			
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The Following Filters are Available for Searches/Retrieve Nominations				ODLLAPSE &
Note that fields marked with """ are available as wildcard searches. Use the "%" key before or after the sea	arch item (e.g., %Nom or Nom%). If "%" is not used, the search w	vill return exact matches only.		
Svc Reg K:	Package ID:	Nom Status:	Cycle: None S	elected 💌
Rec Loc Prop:	Up ID Prop:	**Up K:	Receipt Zone:	•
Del Loc Prop:	Dn ID Prop:	**Dn K:	Delivery Zone:	•
Retro Nom ID: Date	: Submitted:	Retro Status:		
Select method for displaying retrieved data:		V Filter-out Zero Qty Nominations		

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

### **Preset Filter Preference - Pool Balancing Summary**

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Retrieve															

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

Date Filter Rule	4	
O Current Date	POOLING-STATION 30	
NextDay	POOLING-STATION 45 POOLING-STATION 50	
Previous Day	POOLING-STATION 65 None Selected	
First Day of the Month	POOLING-STATION 165 EVENING	
Clast Day of the Month	POOLING-STATION 210 INTRADAY 1 pooling-station 82 INTRADAY 2	Save
Day of Week	POOLING-STATION 82 POST	Delete
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Sivic Req K:	Pool Location: AI 🗸	
View Balanced and Unbalanced: 🗹 Check to filter out Zero Qty nominations: 🗵		

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

# **Preset Filter Preference - View Supply Disagg Summary**

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Nominations> Nomination> View Supply Disagg Summary	User can Specify default value for in	Preset Filters	ROTIONS HENU 🔻	
Filters				COLLAPSE &
* Date: 02/26/2014	* Cycle: TIMELY +	Svc Req Prop:		
Pool Disagg Contract:	Pool Location: All 🔹			
View Balanced and Unbalanced: 🗵 Check to filter out Zero Qty nominations: 🗹				
Retrieve				

Only the contract holder and an agent appointed for the role of norminations 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 supplyidisago data. Other parties must contact the contract holder's holder's data pool supply / disago 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

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View Supply Disagg Summary	Date Filter Rule	None Selected TitleLY	AT POOLING-STATION 30 POOLING-STATION 45				
Nominations> Nomination> View Supply Disagg Summary	<ul> <li>Current Date</li> <li>Next Day</li> </ul>	EVENING NTRADAY 1	POOLING-STATION 50			ACTIONS HE	DNJ 🔻
Filters	O Previous Day	POST P	POOLING-STA 85-ZN 4			0	OLLAPSE &
'Date Default	First Day of the Month Last Day of the Month	RETRO Cycle THELY	200LING-STATION 165 200LING-STATION 210 200LING-STATION 22	Svc Req Prop:		¥ Save	
Pool Disagg Contract:	Day of Week	Pool Location: 📕 🗸	POOLING-STATION 82 POOLING-ST 85-ZN 4A			Delete	
View Balanced and Unbalanced: 🗵 Check to filter out Zero Qty nominations: 🗵	Ok Cancel	L				Cancel	

Chy he 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

### **Preset Filter Preference - PDA**

Home My Dashboard	Navigation - +				Measurement Pipelines •	Tools - Reports	Print Logoff
PDA Flowing Gas> PDA> PDA		User can Specify default	value for in	put filter	rs at the page level	Preset Filters	
* Beg Date: 02/27/2014	End Date: 02/27/2014	* Cycle THELY • Cycle Indicates	* Loc Prop/Name: 9000002 / XYZ	•	Confirming Level: NONE SELECTED		COLUMN DE M
	Loc (DRN): 99999 Last Level Confirmed: Confi Req Prop/Hame: 990001/XYZ LDC Company Last Level PDActs:	Conf Pty Prog/Conf Pty Barnes 99001/V72 LDC Company Auto Conf: TSP EDI Role: Reponder			Conf Party Contact Name: Contact Not Conf Party Contact Phone: Conf Options:	Found	
Check to filter out Zero o	qty Nominations: 🗹 Show PDAs: 🕅						
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View PDAs Only:	ano PDAs Contract ID: Up/ Down K: Up/ Dn/ ID Name: Alloc Rank In	d Alloc Rank Lvf. Limit Value. Clear Fillers					
Retrieve Clea	ar						

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

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* Beg Date: End Date:	Previous Day     Event Day	* Cycle:	* Loc Prop/Name:	* Confirming Level:				
Defaut 02/27/2014	Last Day of the Month	TMELY   Cycle Indicators	9000002 / XYZ 🔹	NONE SELECTED V	Save			
Loc (DRN): 99999 Last Level Confirmed:	Day of Week	Conf Pty Prop/Conf Pty Name: 990001/XYZ LDC Company Auto Conf:	W	Conf Party Contact Names Contact Not F Conf Party Contact Phones	Delete			
Conf Req Prop/Name: 990001/XYZ LDC Company	Ok Cancel	TSP EDI Role: Responder	C	NTRACT Conf Options: All	Cancel			
Last Leve PUARE		EVENING NTRADAY 1 NTRADAY 2 POST 9FTRD	NK TF	AINATON ANSACTON AI				
Filter for PDA				3rd Party Onerstor Lit				
View PDAs Only.				Operator &	Agent			
📶 City Rows with Monzero PDAs								
Pixg ID: Contract ID: Shipper ID: Up/ Down K: Up/ Dn/ ID	) Name: Alloc Rank Ind: Alloc Rank Lvt: Limit Valu	ue: Clear Filters						

Select: Actions Menu > Save, Delete or Cancel

### **Preset Filter Preference – Confirmations**

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My Dashboard 🗙 Retrieve Nominations 🗴 Pool Ba	alancing Summary 🗙 Confirmation 🗴 Monthly Sum	nary X				
Confirmation		User can Specify (	default value for input f	ilters at the page level	Preset Filters	ACTIONS HENU 🔻
Filters						COLLAPSE &
* Beg Date:	End Date:	* Cycle:	* Loc Prop/Name:	* Confirming Level	ŧ	
02/26/2014	02/26/2014	TIMELY   Cycle indicators	9000002/XYZ 🔻	CONTRACT	•	
Loc (DRII): 999 Last Level Confirmed:	39	Conf Pty Prop/Conf Pty Name: 990001/XY Auto Conf:	2 LDC Company	Conf Party Contact Name: Con Conf Party Contact Phone:	tact Not Found	
Conf Req Prop/Name: 990	001/XYZ LDC Company	TSP EDI Role: Responder		Conf Options: Al	•	
Last Level PDAed:						
Check to filter out Zero $\operatorname{qty}$ Nominations: $\overline{\mathbb{Z}}$ Show	PDAs:					
Filter for PDA						EXPAND Q
Retrieve Clear						

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 Levl
- 17. Limit Value

Home My Dashboard Navigation +				Measurem	ent Pipelines • Tools •	Reports Print Logofi			
My Dashboard 🗙 Retrieve Nominations 🗙 Pool Balancing Summary 🗙 Confirm	nation 🗙 Monthly Summary 🗙	None Selected		NONE SELECTED					
Confirmation		EVENING		UPDNCONTRACT					
Filters	Date Filter Rule	NTRADAY 2		TRANSACTION		COLLAPSE &			
* Beg Date: End Date: 02262014	Current Date     Next Day     Previous Day	* Cycle: POST * Cycle: POST TWELY • Cycle: Instantors	* Loc Prop/Name: 9000002 / XYZ		Confirming Level: CONTRACT • Confirming Level is required	Save Delete			
Loc (DRII): 59999 Last Level Confirmed: Confi Req Proy/Name: 59000(XYZ LDC Company Last Level DRAd-	<ul> <li>First Day of the Month</li> <li>Last Day of the Month</li> <li>Day of Week</li> </ul>	Conf Pty Prop/Conf Pty Name: 99001/3/21/DC Company Auto Conf: TSP EDI Role: Reponder		Onf Party Conf Party	Contact Name: Contact Not Found Contact Phone: Conf Options: All				
Check to filter out Zero qly Nominations: 🗹 Show PDAs: 🗍	Ok Cancel			NONE SELECTED CONTRACT UPDNCDNTRACT	All Operator 3rd Party				
Filter for PDA				NOMINATION	Operator Up/Dn ID	COLLAPSE &			
View PDAs Only:				LOCATION	operator a Agent				
Chily Rovie with Norceiro FOAs									
Pikg1D: Contract1D: Shipper1D: Up/Down K: Up/Dn/ID:	Name: Alloc Rank Ind: Alloc Ran	LV: Limit Value: Clear Filters							

#### 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**

Home My Dashboard Navigation • +			Measurement Pipelines 🔻	Tools • Reports Print Logoff
Review/Select Scheduling Runs				$\bigcirc$
Nominations> Scheduled Quantity> Review/Select Scheduling Ru	ns	Jser can Specify default value for in	put filters at the page level	Preset Filters
Filters				
* Flow Date	* Cyde	* Run Type	Viewing Options	
02/27/2014	TIMELY 💌	Intermediate 🔹	🔿 View Cuts 🛛 9 View All	
	Version: TIMELY 02/26/2014 13:30:05			
Svc Req K:		Business Associates: AI	▼ View Non-Zero Noms o	nly
Contract Options: All Co	ontracts 🗸		😰 Show PDAs	
Clear				

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

Home My Dashboard Navigation +			Measurement Pipelines *	Tools 🔹 Re	ports Print	Logofi
Review/Select Scheduling Runs						
Nominations> Scheduled Quantity> Review/Select Scheduling Runs					ROTIONS HENU	-
Filters					COLLR	APSE &
* Flow Date * Cycle		* Run Type	Viewing Options		۷	
02/27/2014 TIMELY		Intermediate	🔘 View Cuts 🗕 View All		Save	
Version:	TIMELY 02/26/2014 13:30:05 AI Contracts				Delete	
Svc Req K:	All transportation Contracts All Storage Contracts	Business Associates:	🖉 View Non-Zero Noms only		Cancel	
Contract Options: Al Contracts	All Pooling Contracts     All Park Loan Contracts		Show PDAs			

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

### **Preset Filter Preference - LDC Quick View**

Home My	Dashboard Navigation •	•				Meas	surement Pipelines •	Tools • Reports	Print Logofi
LDC Quick Vie Flowing Gas> Filters	W PDA> LDC Quid View			User can S	pecify default valu	ue for input filters at the p	age level	Preset Filters	
Location I Flow Date	D: :	9000001 / XYZ LDC Corp			Current PDA Level: End Flow Date:				
V Only R	ows with Nonzero Pdas cheduled not Equal to Limit Value								
Filter for PDA	Information								COLLAPSE
Dir Flo:	Svc Req K:	Svc Req Name:	Alloc Rank Lvl:	Alloc Rank Ind:	Pkg ID:	TT Desc:	Loc Prop:	Clear Filte	<u>rs</u>
Rotriova	Clear								

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 Levl
- 9. Alloc Rank Ind
- 10. Pkg ID
- 11. TT Desc
- 12. Loc Prop

Home My Dashboard Navigation + +					Measurement	Pipelines <b>*</b>	Tools 🔻	Reports	Print	Logofi
LDC Quick View	Date Filter Rule	]						907	TIME MENT	
Filters	Current Date Next Day								COLL	HPSE &
Location ID: 900001 / X/2LDC Cop • Flow Date: Default	<ul> <li>Previous Day</li> <li>First Day of the Month</li> <li>Last Day of the Month</li> </ul>			Current PDA Level: End Flow Date:				Save Delete	¥	
Cody Rows with Nonzero Pdas     POA Scheduled not Equal to Limit Value	Day of Week      Ok      Cancel							Cancel		
Filter for PDA Information		-							COLL	APSE &
Dir Flor: Sive Req K: Sive Req Name: Al	lloc Rank LvI: All	lloc Rank Ind:	Pkg ID:	TT Desc:		Loc Prop:		Clear Filter	<u>8</u>	

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

### **Preset Filter Preference - Allocated Quantities**

ome My Dashboard Navigation +		Measurement Pipelines • Tools • R	leports Print Log
Ilocated Quantities			
Flowing Gas> Allocation> Allocated Quantities		User can Specify default value for input filters at the name level	ters
lters			COLLAPSE
		Allocations Data is available through 02/24/2014	
1 an Bran 9000001 (XXZ   DC Com + Flow Pater 02/25/2014		Allocations for January are Final	
Loc Prop. Support A12 Lbc Culp		View: Daly 👻	
Page Options			COLLAPSE &
Direction of Flow: Bi-Directional	Svc Reg Prop: Up K:	Dn K	
Zero noms: Hide - Subtotak None	▼ PPAs:		
Allocation Information			COLLAPSE &
Prep ID Prop:	Recipient Prop:	Accounting Period:	
Preparer Name:	Statement Recipient Name:	Beginning Flow Date:	
Contact Person:	Statement Date/Time:	Ending Flow Date:	
Contact Phone:	Allocation Transaction Type Code:	Statement Basis:	
Loc Prop:	Location Name:	Direction of Flow:	

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

Home My Dashboard Navigation +	Date Filter Rule	Heasurement	Pipelines 🔻	Tools 🔻	Reports	Print Logoff
Allocated Quantities	Current Date					
Flowing Gas> Allocation> Allocated Quantities	Next Day				AC	IONS MENU 🔻
Filters	<ul> <li>Previous Day</li> <li>First Day of the Month</li> </ul>					COLLAPSE &
*Loc Prop: S00001 / XYZLDC Corp • Flow Date: Default	Last Day of the Month     Day of Week	Allocations Data is available through 02) Allocations for January are Final View:	24/2014	Save Delete	¥	
Page Options				Cancel		COLLAPSE &
Direction of Flow: Bi-Directional    Suc Req K  Zero noms: Hide  Subtate Hone	Svc Req Prop:	Up K: Dn K				
Allocation Information						EXPRIND P

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

### **Preset Filter Preference - Monthly Summary Page**

Home My Dashboard Navigation 🕶 +				Measurement Pipelines •	Tools   Reports	Print Logof
My Dashboard 🗙 Retrieve Nominations 🗶 Pool Balan	ncing Summary 🗙 Confirmation 🗙 Monthly Summary 🗙	llan on Oneite detail	unders for immed fildere o	4 4h a mana lawal		
Monthly Summary Filters		User can Specify default	value for input filters a	t the page level	Preset Filters	
* Act Per: 02/2014 01A: 1 2	* Svc Reg Name/Prop: XYZ LDC Company® • Svc Reg K: Control	Rate Schedule: Zn ID:	▼ Zone ID	Loc ID (Prop):		
Display Zero Imbalances:		Select All For Aggregated Transactions				
Clear						

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

Home My Dashboard Navigation 🕶 +				Measurement Pipelines •	Tools • Reports Print Logofi
Ny Dashboard 🗙 Retrieve Nominations 🗶 Pool Balancing	Summary X Confirmation X Monthly Summary X		FT		
Monthly Summary			FTG FTNT(7C)		ROTIONS HENU V
Filters			LEIDY(7C) NPIEC		COLLAPSE @
* Acct Per: 02/2014	* Svc Reg Name/Prop: XYZ LDC Company/990001	Rate Schedule:		Loc ID (Prop):	
	Svc Req K: Contract	Zn ID:	Zone ID PLTFLASHGAS		Save
Display Zero Imbalances:	Select All For /	Aggregated Transactions	EXCHANGE PVR OBA		Delete
Formulas: (1) Total = Production Month Imbalance+PPA Availabi DF - FROM Init Trdr; DT - TO Init Trdr DDA Subject to Cashovir - Denotes DDAs that are subject to Ca	le for Trade (2) Imbalance Percentage = TotalProduction Month Deliveries		FLORDAGAS O&M-NITRUP ITC NSDIFT		Val Du
PPA Avail for Tru - Denotes PPAs that are incorporated into cu	FT-SS-1 7C CTGS FDLS DLS FLORDAGASIT				
			SS-OVT UNAT		

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

### **Preset Filter Preference – Offers**

Home My Dashboard Navigation + +	Measurement Pipelines * Tools * Reports Print Logof
Offes Capacity Release' Offers Filters Filters	User can Specify default value for input filters at the page level
Release Term Start Date: 12 V Release Term End Cover Release Prop: Bidder Prop:	Offer Nor     Offer Status:     Offer Status       Rel Ko     Rate     Rate       Schedule:     Rate Schedule
Additional Filters	E3980 0
Retrieve Clear	

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

### **Preset Filter Preference – Bids**

apacity Release> Bids	User can Spe	scify default value for in	put filters at the	page level	ers Actions
ters					COLLA
Release Term Start >=      AND      AND      Release Term End     Date:	· ·	Offer No:	Offer Status:	Offer Status	
Bid Period Start Date: <= 💌 📰 AND 🔻 Bid Period End Date: 5	5m 💌	Bid No:	Bid Status:	Bid Status	
Releaser Prop: Bidder Prop :		Rel K:	Rate Scheduler	Rate Schedule	
		Show Currently Biddable N	on-Permanent Offers: -		
titoan Ciltore					OOLL
Altorial Filicis					
nicinal riners			Perm	el: 🛄 1(Y) 🛄 2(N)	
Pream (Y) (Y) (N)	Loc Prop [Receipt]:				
Preat: 1(Y) = 2(N) Deak: 02(Y) = 2(N) Bid Deak: 02(Y) = 02(N)	Loc Prop [Receipt]:		Index Ba Relea	ed 🗾 Basic 🛄 Unique 🛄 None	
Mandar Hinds Peak 2 (17) = 2(N) Bid Deak = 02(Y) = 02(N) Cycler = These = Excessio = INTEADAY 1 = INTEADAY 2	Loc Prop [Receipt]:	••••••••••••••••••••••••••••••••••••••	Index Ba: Relea	ed 🔲 Basic 🔲 Unique 🔲 None	

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

# **Data Configuration Preference**

	Click on the Data Configuration Icon to rearrange columns and filters						]						
Retro Status	Beg Date 🍵	Svc Req K 🍦	Π 🖕 1	Rec Rank 🏮		Rec Loc Prop 🏮			Ир К 🖕	Del Loc Prop 🍵		Dn 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	Dn 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	TINELY	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	TINELY	1		LEDY-D			990001 - XYZ LDC	POOLING		99001-	N

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



0-1	0-44		
Colu	imn Settings		
			× ✓
Ord	er Name Sort		
\$	Svc Req K	<b>3</b>	
	Svc Req Name	1	
\$	Retro Status	2	
	Retro Request ID	1	
\$	Nom Status	1	:
	Error		
\$	Beg Date	1	
	End Date	<b>.</b>	
\$	Π	1	
	Cycle	1	
\$	Package ID	1	
\$	Rec Loc Prop		
	Rec Loc Name	1	
t	Rec Qty		
t	Fuel %		
•			

What it looks like after rearranging the top three columns:

C

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 colu	mn order an	d filter sett	ing										
4	¥	1											
🔹 Svc Req K 🏮 3	Retro Status 🗘 2	Nom Status 🗍 1	Beg Date	Π		Rec Loc Prop			Ир К 🌷	Rec Rank 🏮	Del Loc Prop 🍦		Dn K 🏮
Svc Req Name 🌷	Retro Request ID 🖕	Error	End Date	Cycle 💭	Package ID 💭	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		LEIDY-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.

Home My Dashb	oard Navigation 🔻	÷							Me	easurement Pipelines	·▼ Tools ▼ R	eports Print Logo
Monthly Summary												
Flowing Gas> Imbalanc * AULI PET: OIA:	e> Nonthly Summary 02/2014 1 2		* эмскец матле/ Pro Svc Req I	XYZ LUC Company/99	▼ Contract	Kdle	Zn ID:	▼ Zone ID		FOC TD (NLOD):	<u>Preset F</u>	ACTIONS MENU
🔲 Display Zero In	balances				Select All	For Aggregated Transaction	15					
Retrieve Download	Clear		First Block						Sec	ond Block		
8					Imbalance	data is available thr	ough 02/28/2014					
									Februa	ary 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)
п	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
π	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



\*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**

onfirmation	Confirmation				Click on P	reset Filters	Pre	eset Filters	ACTIONS HENU
lters					<b>-</b>				COLLAPSE
* Beg Date: 05/27/2014		End Date: 05/27/2014	* Cycle: NTR4DAY 1  Cycle Indicators	* Loc Prop/Name: 9000001	XVZ LDC Corp	* Confirming Leve NOMINATION	t T		
	Loc (DRNI): 0 Last Level Confirmed: Conf Req Prop/Name: 401151/ Last Level PDAed:	Transco	Conf Pty Prog/Conf Pty Hame: 99001,1/12LDC Company Auto Conf: TSP EDI Role: Responder		Conf Pa Conf Par	ty Contact Name: Judy Hal ty Contact Phone: 713-215-4 Conf Options: All	622 •	,	
Check to filter out Zero	qty Nominations: 🗵 Show PDAs:								

Auto refresh feature on the Confirmation and PDA pages.

Home My Dashboard Navigation 🔻 +			Measurement Pip	pelines 🔻 Tools 🔻	Reports	Print	Logofi
Hourly Measurement X Contracts/Amendments X Confirmation X							
Nominations> Confirmation> Confirmation						rotions me	NU 🛡
Filters						Save	
* Beg Date: End Date:	* Cyrcle: * Loc Prop	/Name:	* Confi	firming Level:		Delete Cancel	
Loc (DRII): 0	Conf Pty Prop/Conf Pty liame: 99001/X/2 LDC Corpany		Conf Party Contact Name	ie: Judy Hal		Disable Auti	o Filter(s)
Last Level Confirmed:	Auto Conf:		Conf Party Contact Phone	e: 713-215-4622	_	Λ	
Cont Neg Prop/Name: 411151/rransco Last Level PDAed:	15º EDI Kole, «éponder		Cont Options	IS: All	,	ľ	
Check to filter out Zero qty Nominations: 🗵 Show PDAs: 🗏						1	

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.