



The dashboard contains several widgets with information relevant in daily operations. This includes information on Nominations, Imbalances, and Active contracts. We will start by looking at active contract reporting.



Several pieces of information are available on the active contract screen. Those include attributes such as contract #, the contract type of service (TOS), and current MDQ. When done, the back arrow can be used to return to the dashboard.

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Next we will look at nominations, in particular, nomination cuts. Select the nomination cuts link.



Two grids exist within the nomination cuts screen. The top grid is related to the current day, the bottom is related to the next gas day. Within each grid, the contract #, nomination point, nomination qty, and confirmed qty are visible. When done reviewing, select the X in the upper right corner to return to the dashboard.



Next we will look at imbalance.



The Inventory Imbalances screen will provide a summary of current imbalance by contract. A warning message will appear if the contract is outside of balancing limits. On this screen, select the Actions icon to retrieve additional detail.

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The action button will open the Authorization to Post Imbalances screen. On this screen, select the activity tab to view daily detailed information on the imbalance. The information can be exported to a spreadsheet by selecting the Gear -> Actions -> Export to Excel. When done, select the X to return to the previous page.

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The system has several other built in reporting features. Those reporting features are accessed through the Reports screen. To access the screen, select the "hamburger" menu button, expand Reports, and select Reports.



A list of reports will be shown when the reports screen appears. Each report includes a brief description. Reports are grouped together in categories based on typical use. The list of reports will update when a category is selected. The Report screen also includes a search function. A list of potential reports will appear as information is entered in the search box.

Reports			🕐 Xcel Energy
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AGGREGATE LOCATION MONTHLY (EXTERNAL - EXPORT) (RALRX07_EX-QPTM)		₫ ♥	Favorites ^
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LOCATION M-T-D IMBALANCE(EXTERNAL) (RPT_ALRX05-QPTM)		₫ ♥	CAW CAPACITY RELEASE (QPTM) 3 CAW CONFIRMATIONS (QPTM) 9
MEASUREMENT INFORMATION (EXTERNAL - EXPORT) (RALRX04_EX-QPTM)		₫ ♥	CAW CONTRACTS (QPTM) 3 CAW INVENTORY (QPTM) 12
MEASUREMENT INFORMATION (EXTERNAL) (RPT_ALRX04-QPTM)		₫ ♥	CAW NAESB DOWNLOADS (QPTM) 9
MONTHLY ACTIVITY - PATH (RPT_ALRX18-QPTM)		₽ ♥	CAW NOMINATIONS (QPTM) 14
MONTHLY ACTIVITY - PATH (EXTERNAL - EXPORT) (RALRX18_EX-QPTM)		₫ ♥	
87		,	

The report screen can also be viewed in a more compact form to make more reports visible at once. This is done by selecting the grid button in the upper right corner. The button is used to toggle between the two views as desired.





Report execution starts with identifying the report of interest. In this case, we will use the search box. Begin typing in monthly nom. Select MONTHLY NOM ACTIVITY – PATH (RPT_NNX22-QPTM) when it appears in the drop down.

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Select the folder icon to Launch the report.

	Execute MONTHLY NOM ACTIVITY - PATH (RPT_NNX2				ΞX	1	
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A series of prompts will occur. The prompts will vary by report. For this report, at a minimum, production or accounting month must be populated. Populate the Production Month with 4/1/2019. One item of interest before executing the report is the Report Export File Type field. This allows the user to toggle between different file formats such as PDF or XLSX. Once selected, select the execute button.



A status window will appear in the lower right hand corner of the screen. Once complete and successful, the report status bar will show green on the left side, and a prompt will open at the bottom of the screen to save or open the file. Depending on your need, you can select which ever option is applicable. For today, we will select open. One note, you will also need to select close on the status menu to clear it from the screen.

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Once the report is open, you will see a report similar to the one shown above.





The system has a number of reports depending on the information desired. Here is a list of common reports for specific tasks.

Note: Several Reports have two versions, one with and one without, the word Export in the title. The work Export in the title indicates the report is formatted in a more spreadsheet friendly way. These reports are recommended if the data is being downloaded for analysis in spreadsheets.

