June, 2009 – Query/Copy Unprocessed Nominations

The *Query/Copy Unprocessed Noms* screen is another valuable INSIDEtracc resource tool serving multiple purposes. It is an ideal screen to use to:

- Query all your nominations saved to the database for any day in the future that has not yet been processed.
- See if you and your counterparty are matched for any future-day nominations.
- Copy a saved nomination to a future date that has not yet been processed.
- View the history of your original nomination.
- Export your nominations to a .csv, Excel or .pdf file.

To access this screen, navigate to *Nominations*, *Query/Copy Unprocessed Noms*. You will notice that the screen is separated into five distinct sections: Date Range, Source, Destination, Cycle and Create Date.

The Start Date field is required for a query, as designated by a yellow field. A query can be done using only the start date; however, to narrow your query results it is advisable to select at least one other input field in addition to the start date. Fill in as many fields as desired in any of the five screen sections, then click the Query button. The results will be displayed in a table at the bottom of the screen. The results in the table will include all the input parameter fields as well as other critical nomination data such as the Seller and Buyer codes, Source and Destination rankings, and Receipt and Delivery volumes.

The first column in the query table is titled "Actions" and can display up to three icons. If you place your cursor over any of the icons, a float over description will display what action will be taken if you click on that icon.

Magnifying Glass Icon

View nomination details by clicking on the **magnifying glass icon**. A Nomination Detail pop-up window will appear, showing information about the nomination and a History table.

The History table will show if you are matched on volume with your counterparty. It will also show changes made to a nomination during the life of that nomination.

For example, a Timely nomination for tomorrow is submitted for a volume of 5,000. It is increased to 7,000, then increased again to 9,000. All of these increases have taken place prior to the Timely deadline. The latest nomination for 9,000 will be processed after the Timely deadline. However, all three versions of the nomination will show in the History table.

Note: Any changes made to the nomination after the deadline will be seen in the Query/Replace Processed Noms screen.

Duplicate Paper Icon

Copy a saved nomination by clicking on the **duplicate paper icon**. This action will open the Copy Nomination screen. All data inputs from the original nomination will be intact except for the Start and End Dates and the receipt and delivery volumes. Those fields are not copied over from the original nomination and must be entered for your new nomination. In addition, any other input field can be modified if desired.

To create the same nomination for a new date or date range, input a new Start and End Date along with a new receipt or delivery volume. Only one volume field can be entered. If you input the Nom Rec Vol, INSIDEtracc will gray out the delivery volume field and determine that volume once the nomination is submitted to PG&E. If you input the Nom Del Vol, INSIDEtracc will gray out the receipt volume field and determine that volume upon submit.

Once the new nomination has been submitted, the Copy Nomination screen will close and you will be back at the *Query/Copy Unprocessed Noms* screen. To see the new nomination in the query table, enter the new start date and click the Query button.

Matched Indicator (Circle) Icon

A circle icon will indicate whether your nomination is matched with your counterparty's nomination.

<u>No Circle</u>

The match process has not yet been run by California Gas Transmission's Gas Scheduling team.

<u>Blank Circle</u>

A blank circle means the match process has been run but the nomination is not matched by the counterparty. This mismatch could occur if you have submitted your nomination to the database but your counterparty has not yet submitted their matching nomination. Or it could occur if you have submitted your nomination to the database but your counterparty has submitted their nomination using different attributes.

In order to have a fully-matched nomination, ten attributes of your nominations must match exactly: Start Date, End Date, Source ID, Receipt Pt., Destination ID, Delivery Pt., Package, Transportation Exhibit, Seller Code and Buyer Code.

<u>Half-filled Circle</u>

A half-filled circle designates a partial match with your counterparty. For example, one party has nominated for a full month (i.e., 6/1/2009 through 6/30/2009) and the counterparty has nominated for only one day (i.e., 6/1/2009 through 6/1/2009). In this case, the counterparty has chosen to submit a nomination each day. Because of this, a half-filled circle will appear depicting a partial match each day after the match process has run.

<u>Filled Circle</u>

A filled circle means that all ten attributes match exactly between you and your counterparty.

Note: the nomination volume field is <u>not</u> one of the ten attributes validated by the match process. Matching on volume happens during the confirm process. In order to see if you and your counterparty are matched on volume before CGT Gas Schedulers launch the confirm process, you will need to click on the magnifying glass icon in the *Query/Copy Unprocessed Noms* screen.

Helpful Tips:

1. INSIDEtracc's automatic match process runs every 7 to 10 minutes throughout the day. Nominations between you and your counterparty may be unmatched for 7 to 10 minutes until the next match process completes.
2. The *Query/Copy Unprocessed Noms* screen is your "go to" screen to check your nominations before the Timely deadline. All changes before the deadline will be picked up and processed in the Timely confirm process. After the Timely deadline, all nomination changes will need to be done in the *Query/Replace Processed Noms* screen.
3. The *Query/Copy Unprocessed Noms* screen cannot be used to check your confirmed or scheduled volumes; this screen only shows your most

recent nomination volume. You can view nominated, confirmed and scheduled volumes for a specific nomination, as well as other pertinent data, from the *Query/Replace Processed Noms* screen.

4. One of the input fields on the *Query/Copy Unprocessed Noms* screen is the "Create Date" field. Enter a date in this field to query specific nominations entered on a particular day.

> For example, you have baseload nominations that encompass the entire month, and mid-way through the month you enter nominations for swing deals. Query on the Create Date parameter field using the mid-month input date in order to see only the swing deal nominations.

5. If you miss a deadline you can call the Scheduling Helpline to request a nomination overwrite. Use the copy feature to create a new nomination by modifying the Package field to make the nomination unique. This will allow CGT Scheduling the ability to overwrite the nomination back to the desired nomination cycle.