User Preferences

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

Gulfstream

User Preferences

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Important Information – Please Read

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User Preferences

Introduction

Preset Default Tabs – Preset up to 5 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. PDA
3. Confirmations
4. Review/Select Scheduling Run – Contract View
5. Allocated Quantities
6. Monthly Summary
7. Offers*
8. Bids*

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

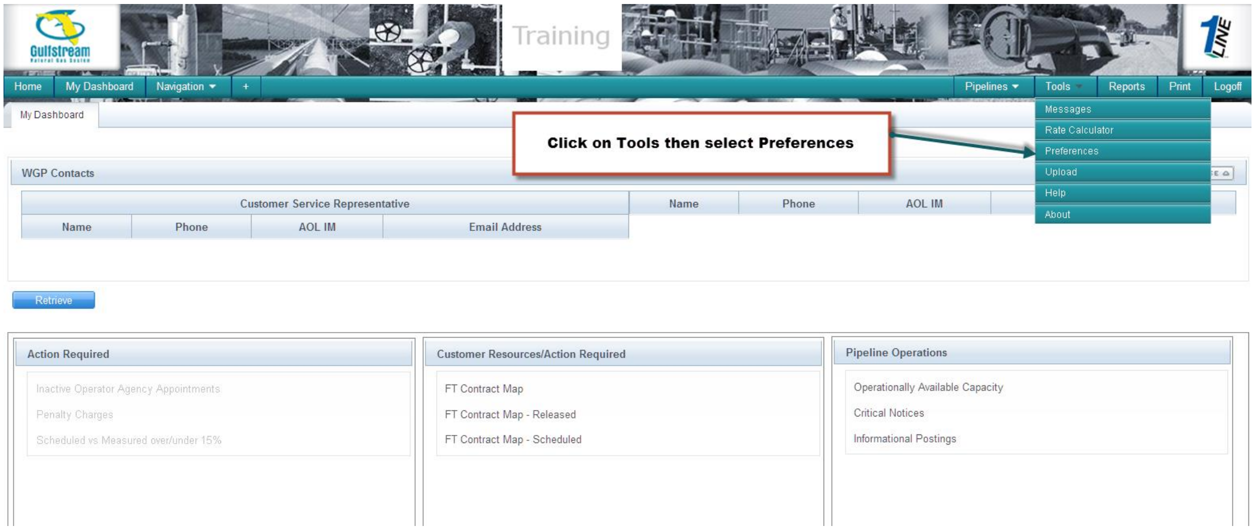
The default date filter allows the user to collect from the following options:

- 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

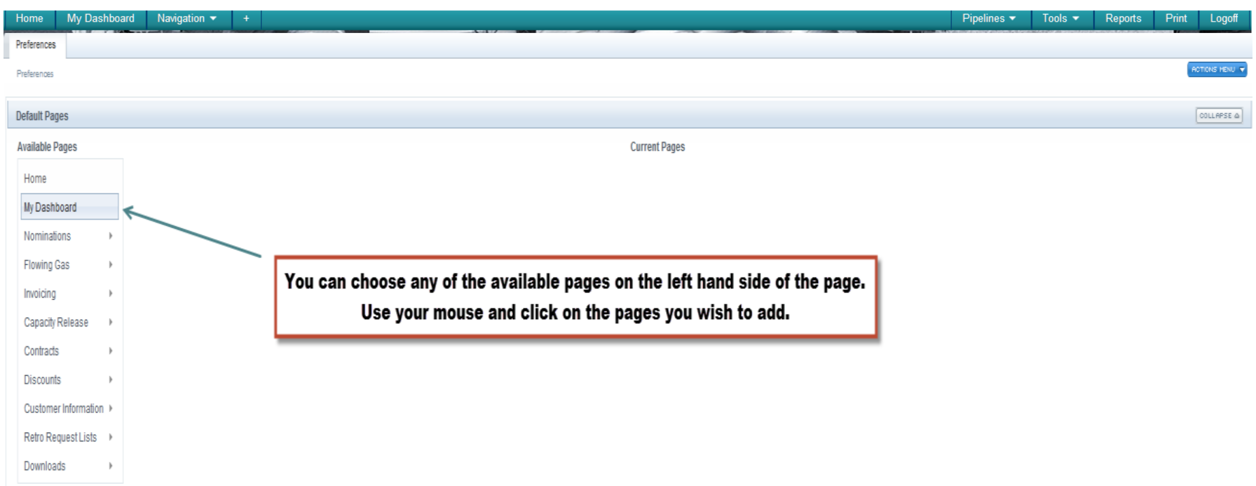
Preset Default Tabs Preference:

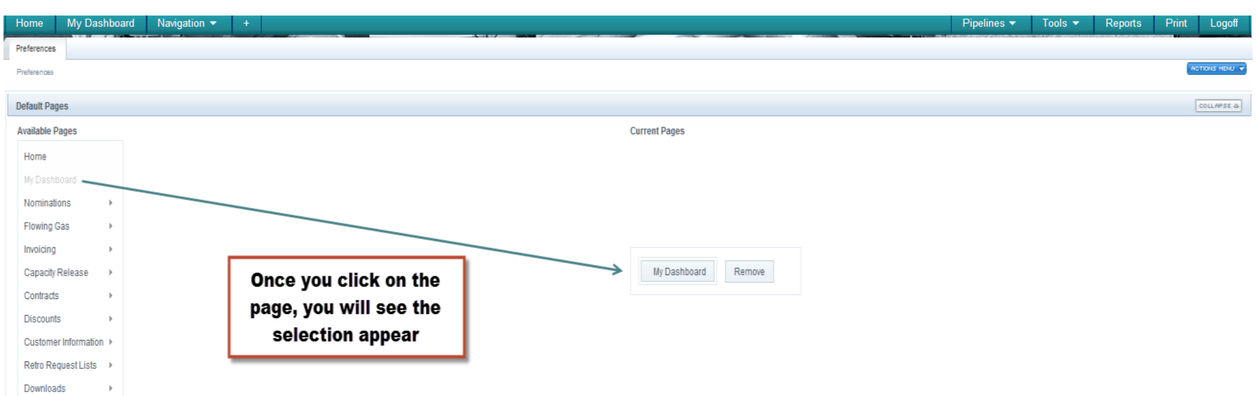
In order to Set Preset Default Tabs:

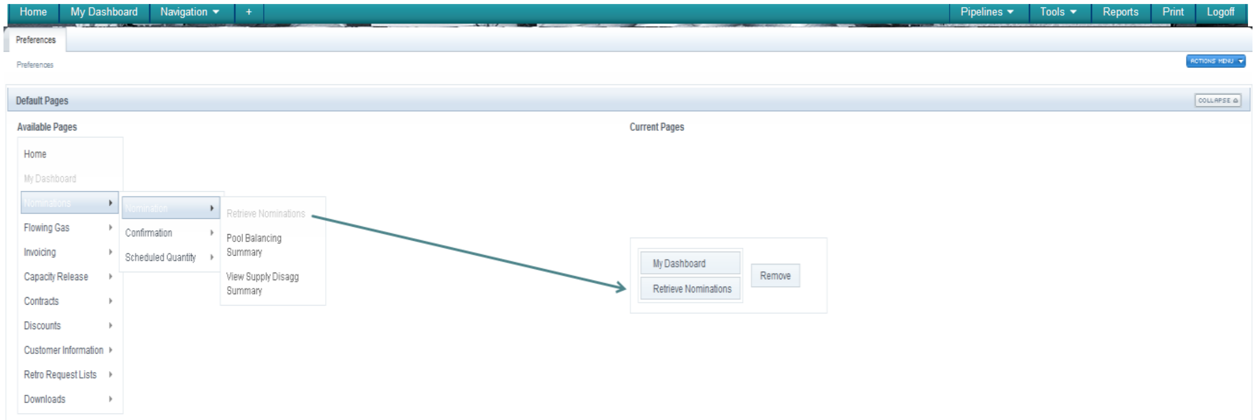
1. Click on Tools
2. Select Preferences



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.



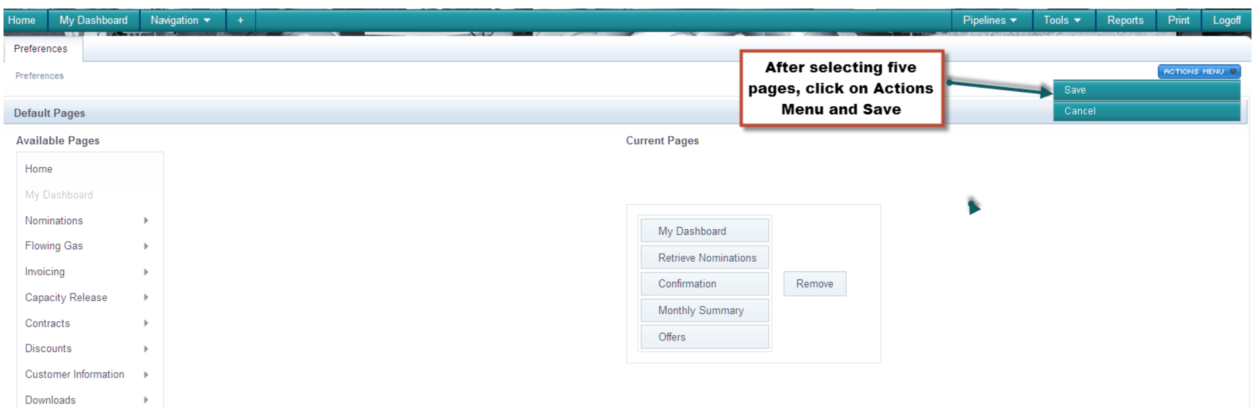




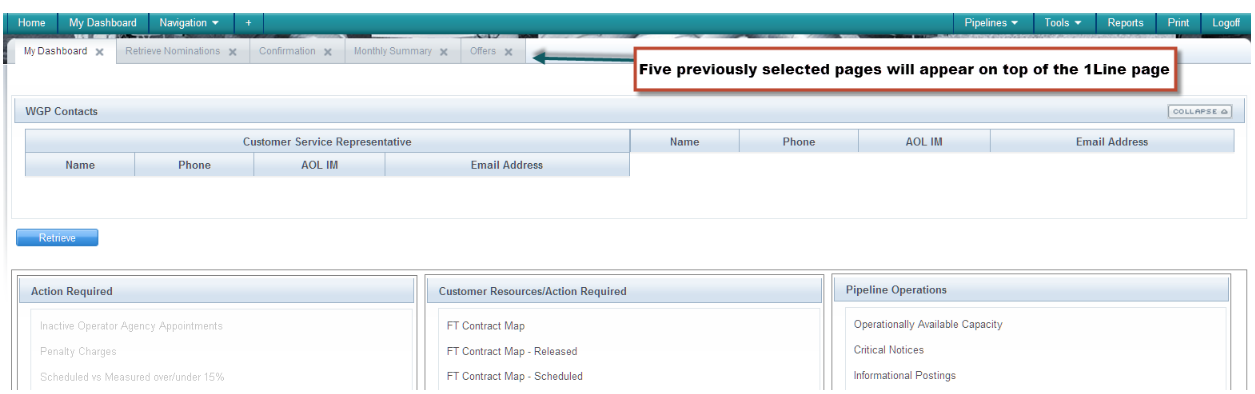
To remove selections, **select** the page in the Current Pages section and then **select** the Remove action button.

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.

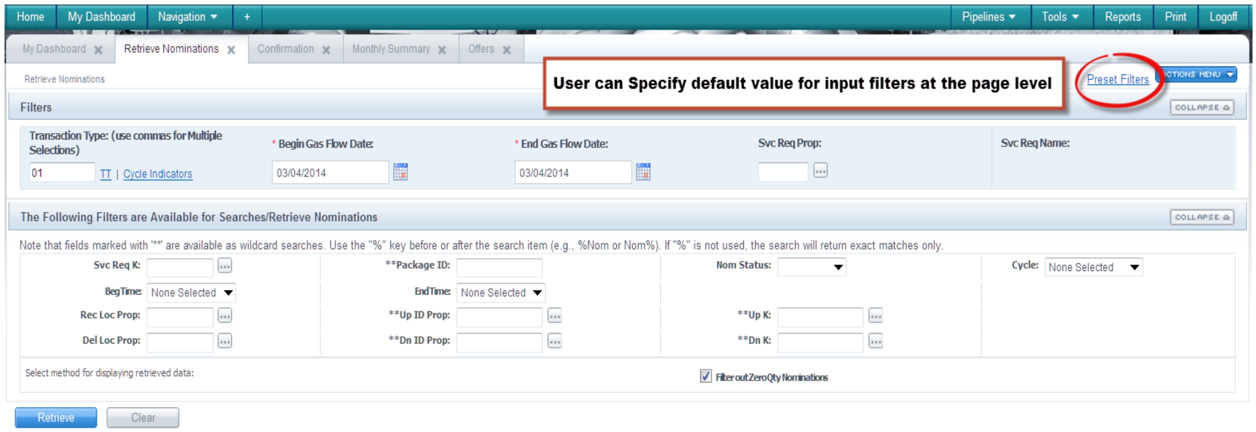
Select > **Actions Menu** > **Save** this will save your preference tabs and the order you want them to be displayed.



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

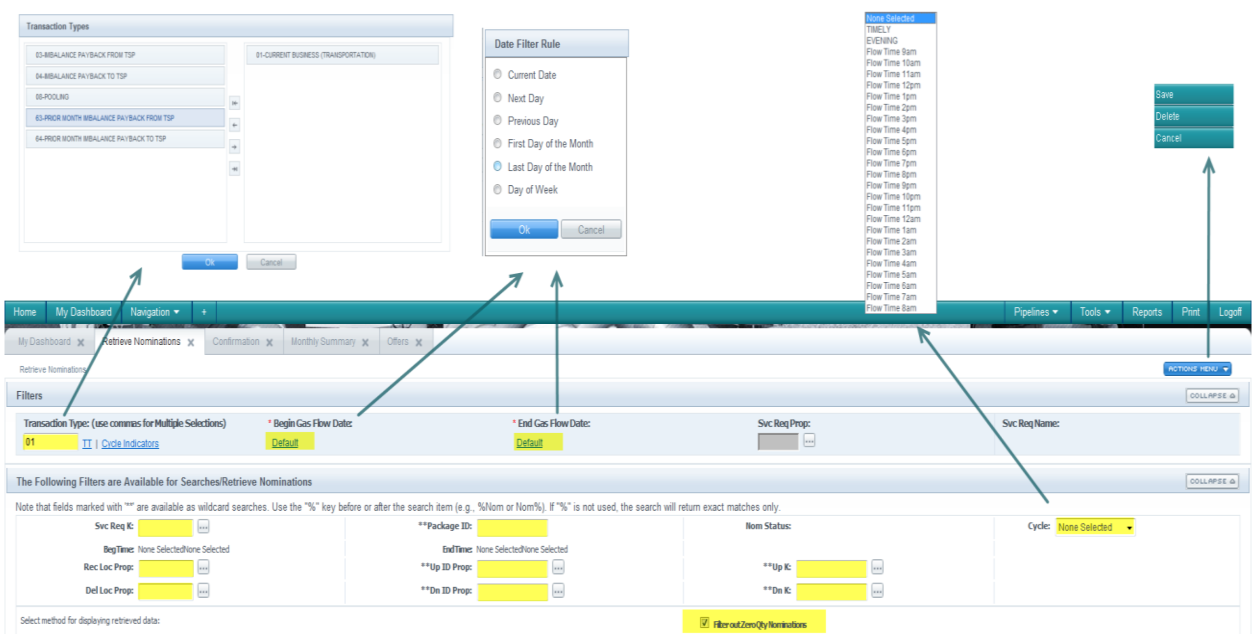


Preset Filter Preference - Retrieve Nominations



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

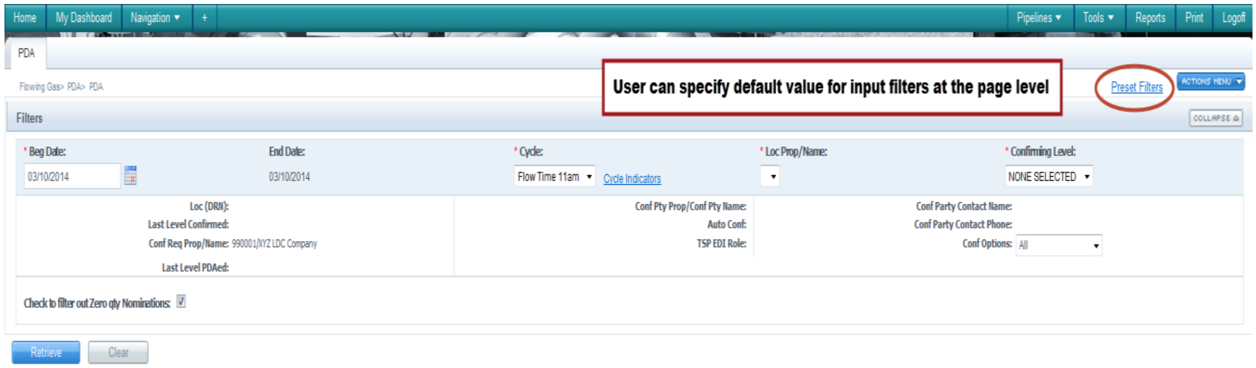
1. Transaction types
2. Begin and end flow date
3. Svc Req K
4. Rec and Del Loc Prop
5. Package ID
6. Up and Dn ID Prop
7. UP K and Dn K
8. Cycle
9. Filter out Zero Qty Nominations



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

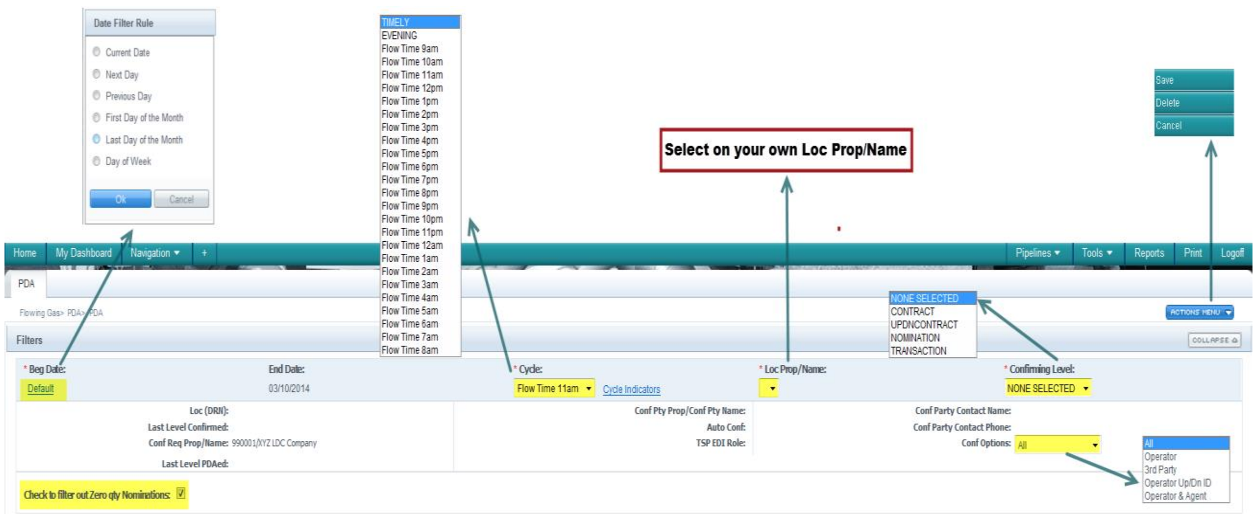
Select Delete to go back to original default dates, or Cancel if you have saved previous preset filters and don't want to keep the current changes.

Preset Filter Preference - PDA



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

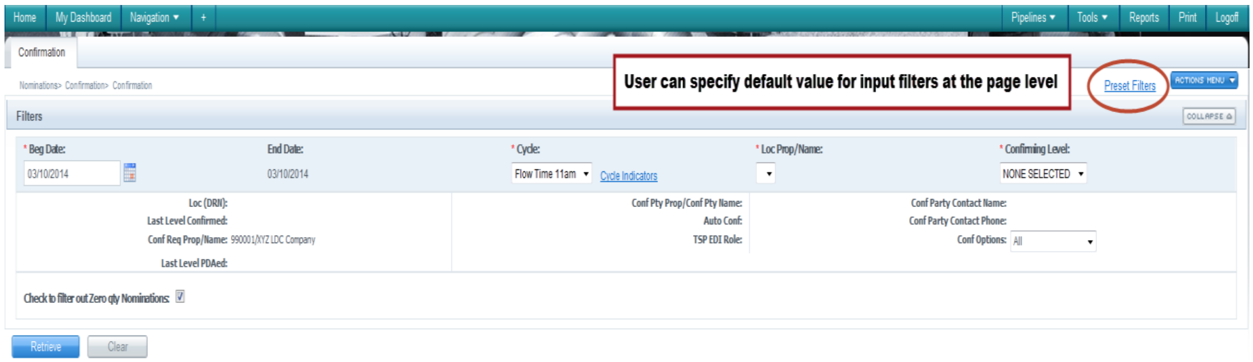
1. Beg Date
2. Cycle
3. Loc Prop/Name
4. Confirming Level
5. Conf Options
6. Filter out Zero Qty Nominations



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

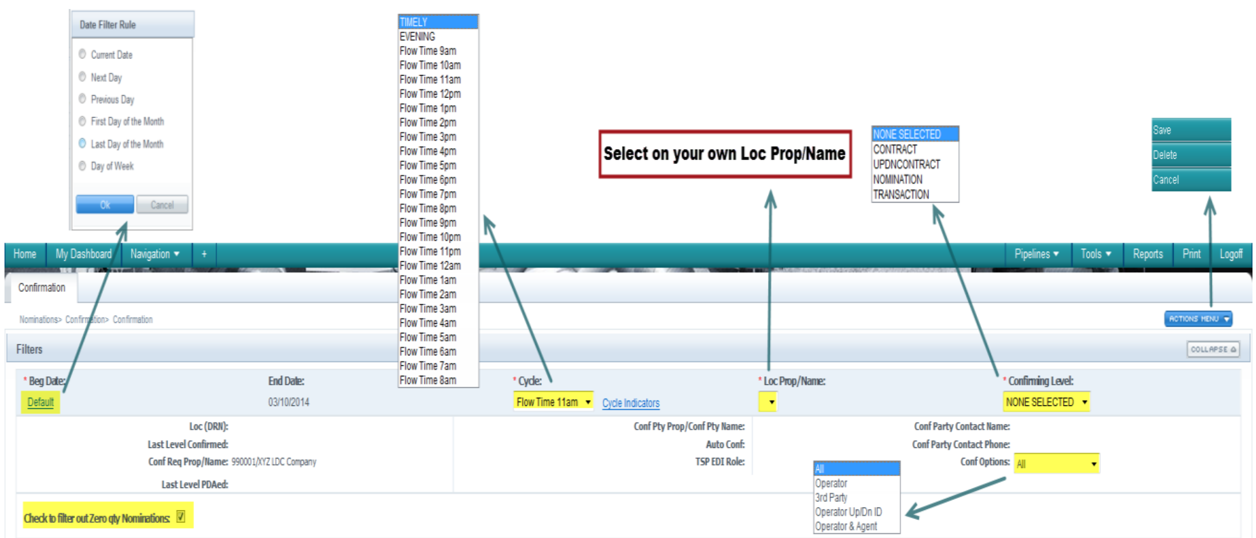
Select Delete to go back to original default dates, or Cancel if you have saved previous preset filters and don't want to keep the current changes.

Preset Filter Preference - Confirmations



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

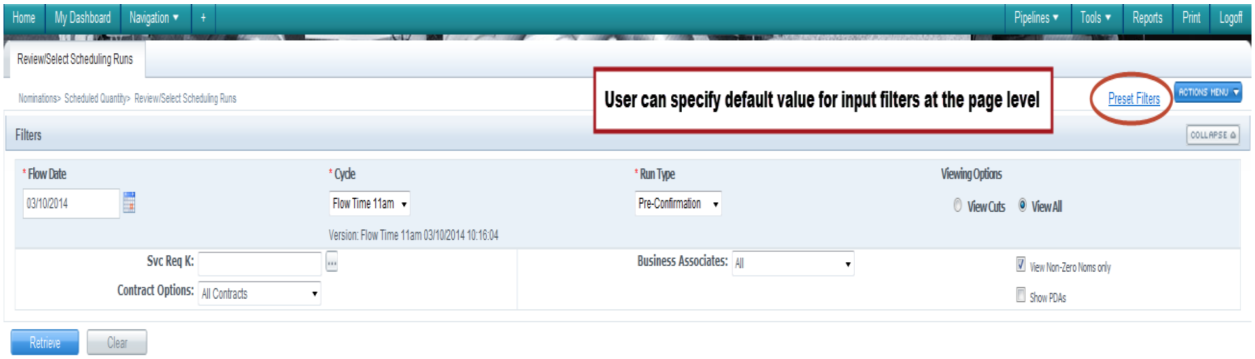
1. Beg Date
2. Cycle
3. Loc Prop/Name
4. Confirmation Level
5. Conf Options
6. Filter out Zero Qty Nominations



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

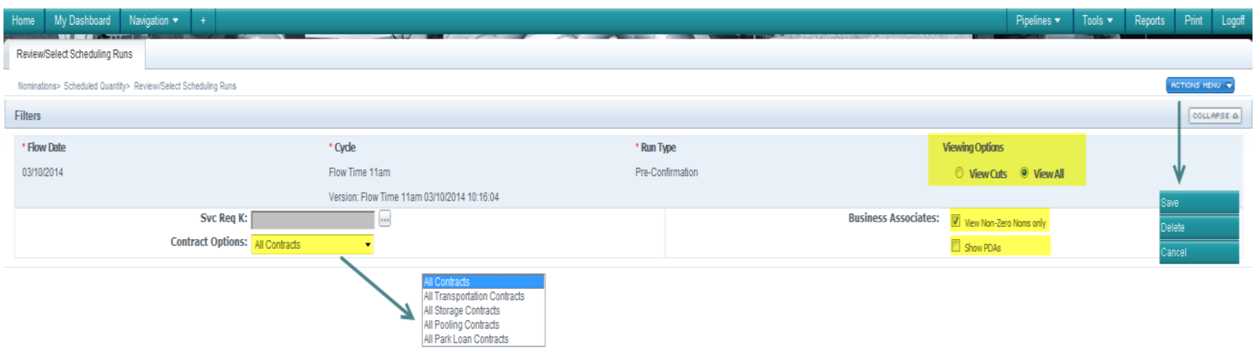
Select Delete to go back to original default dates, or Cancel if you have saved previous preset filters and don't want to keep the current changes.

Preset Filter Preference - Review/Scheduling Runs



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

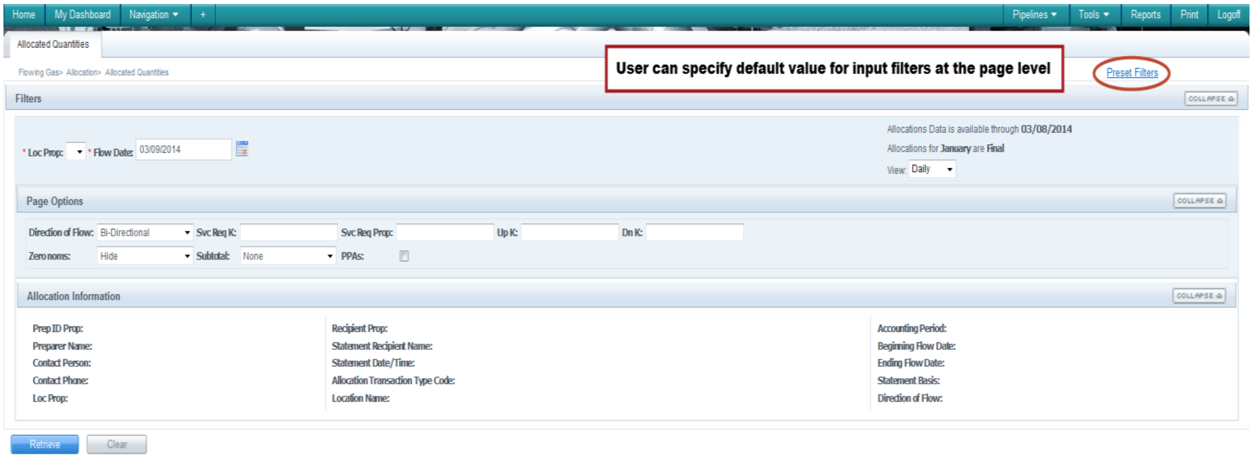
1. Contract Options
2. View Options
3. View Non-Zero noms Only
4. Show PDAs



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

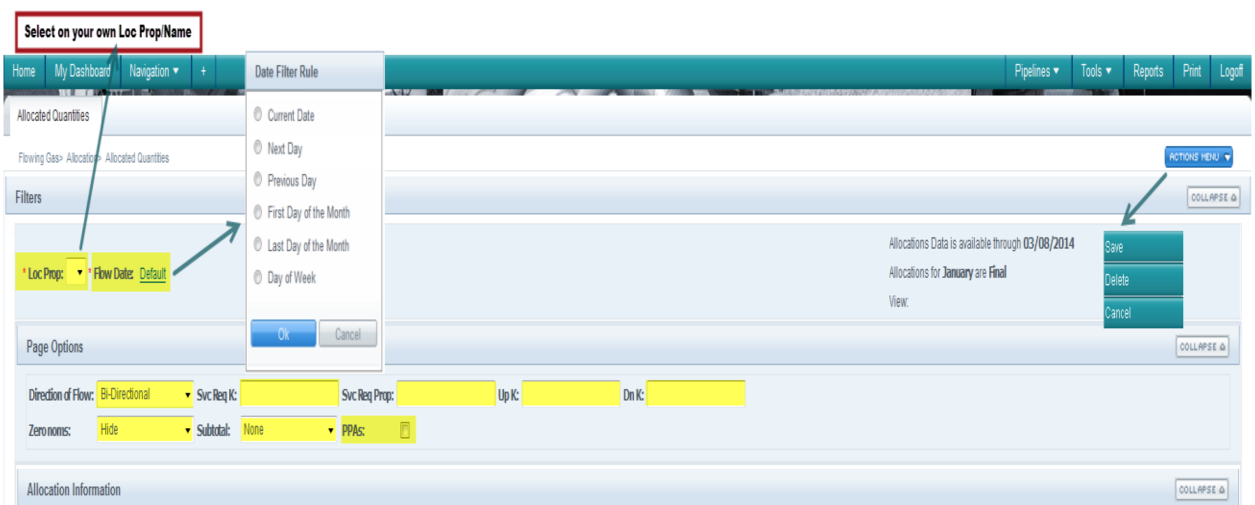
Select Delete to go back to original default dates, or Cancel if you have saved previous preset filters and don't want to keep the current changes.

Preset Filter Preference - Allocated Quantities



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

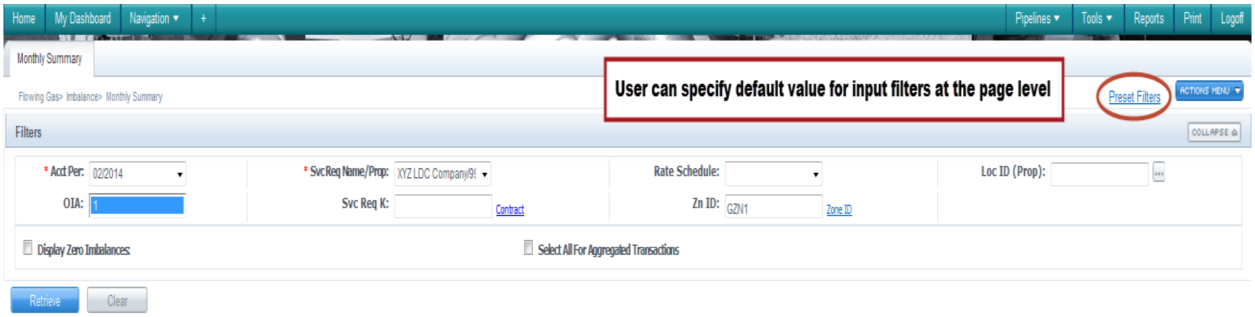
1. Loc Prop
2. Flow Date
3. Direction of Flow
4. Svc Req K
5. Svc Req Prop
6. Up K
7. Dn K
8. Zero Noms
9. Subtotal
10. PPAs



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

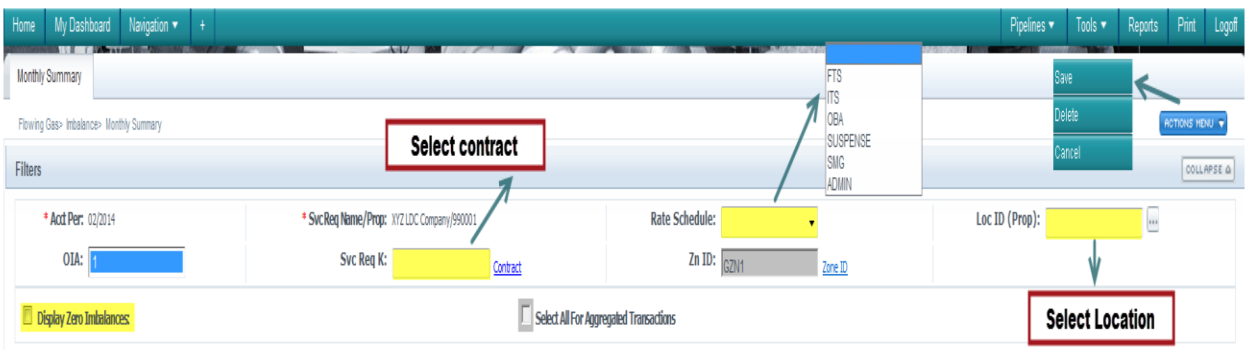
Select Delete to go back to original default dates, or Cancel if you have saved previous preset filters and don't want to keep the current changes.

Preset Filter Preference - Monthly Summary Page



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

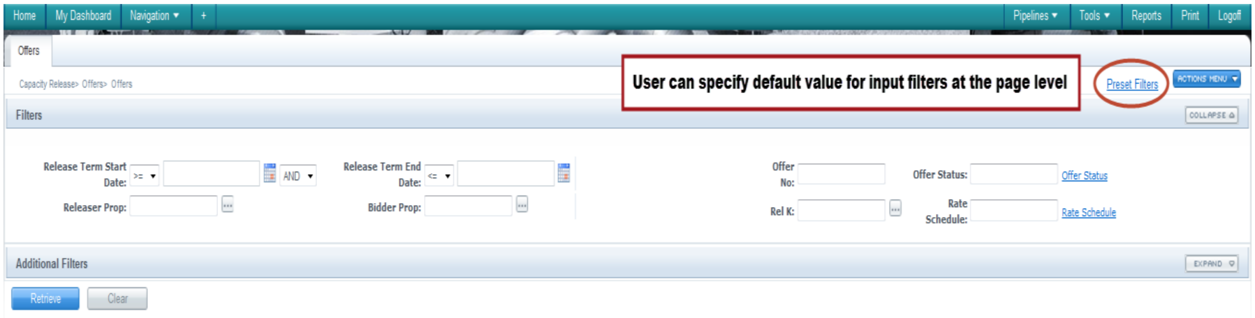
1. OIA
2. Svc Req K
3. Rate Schedule
4. Loc ID (Prop)
5. Display Zero Imbalance



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

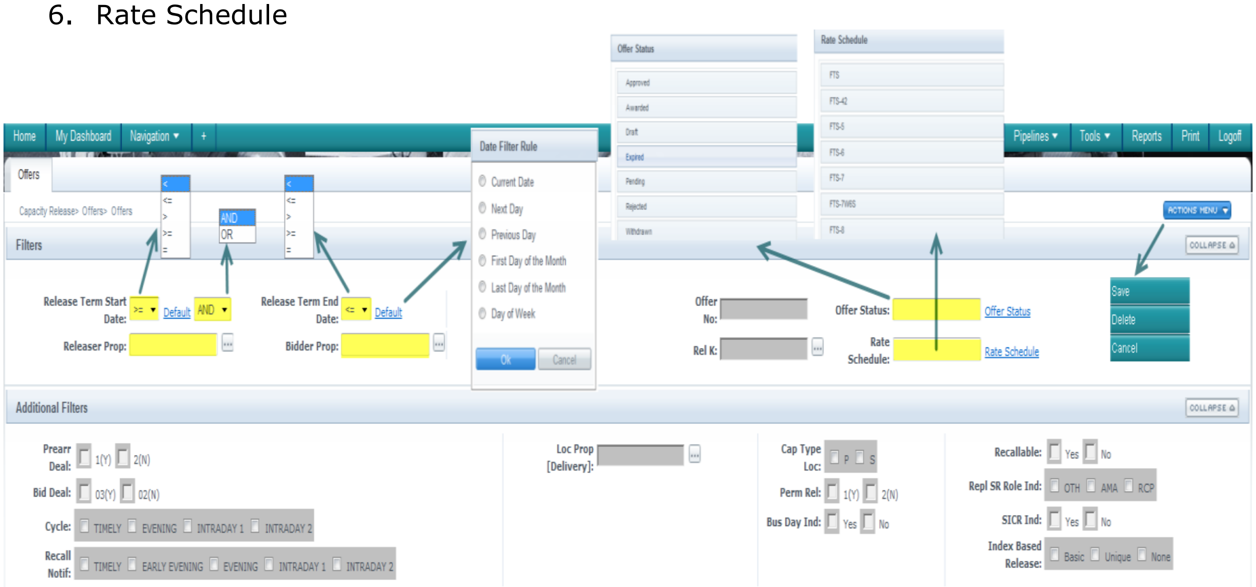
Select Delete to go back to original default dates, or Cancel if you have saved previous preset filters and don't want to keep the current changes.

Preset Filter Preference – Offers



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

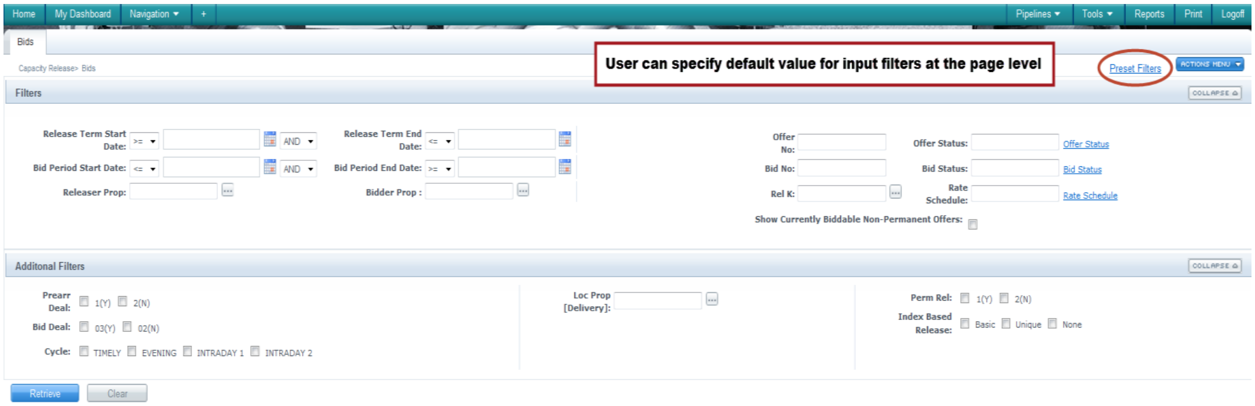
1. Release Term Start Date
2. Release Term End Date
3. Releaser Prop
4. Bidder Prop
5. Offer Status
6. Rate Schedule



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

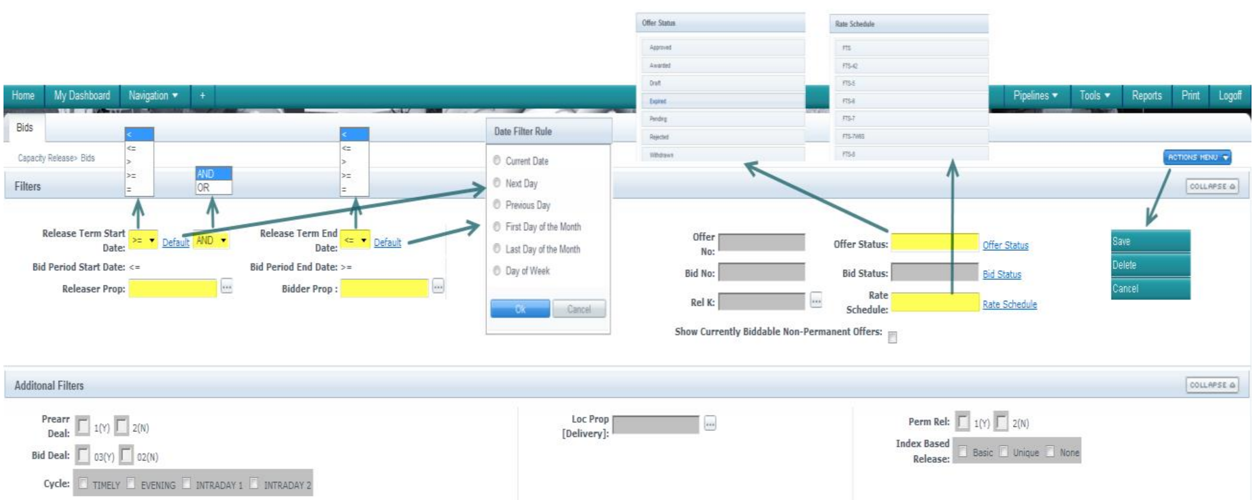
Select Delete to go back to original default dates, or Cancel if you have saved previous preset filters and don't want to keep the current changes.

Preset Filter Preference – Bids



Once you click on **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

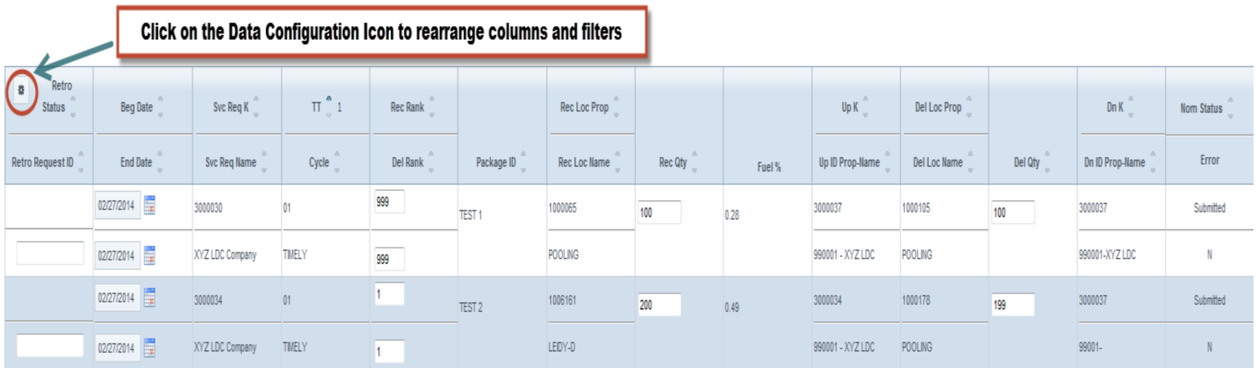


Select Actions Menu > **Save**, **Delete** or **Cancel**

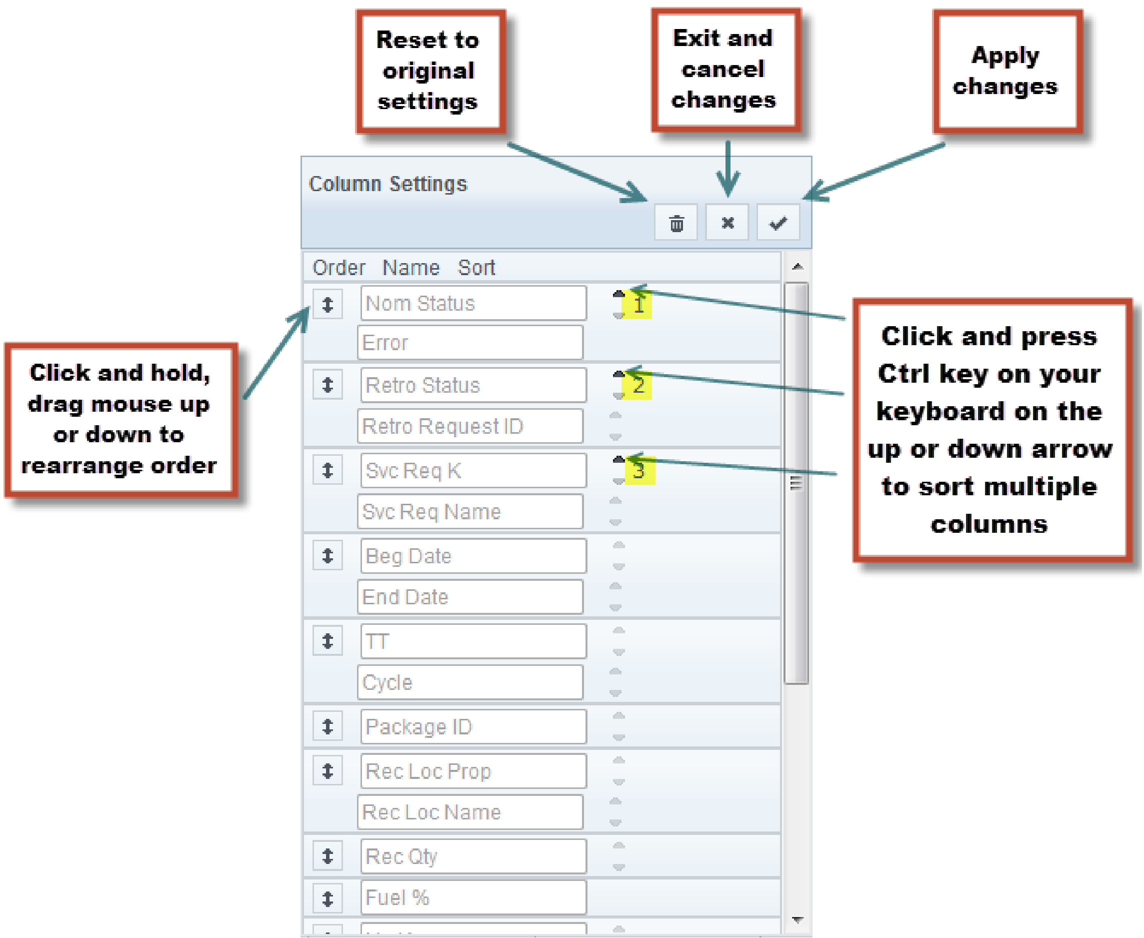
Select Delete to go back to original default dates, or Cancel if you have saved previous preset filters and don't want to keep the current changes.

Data Configuration Preference

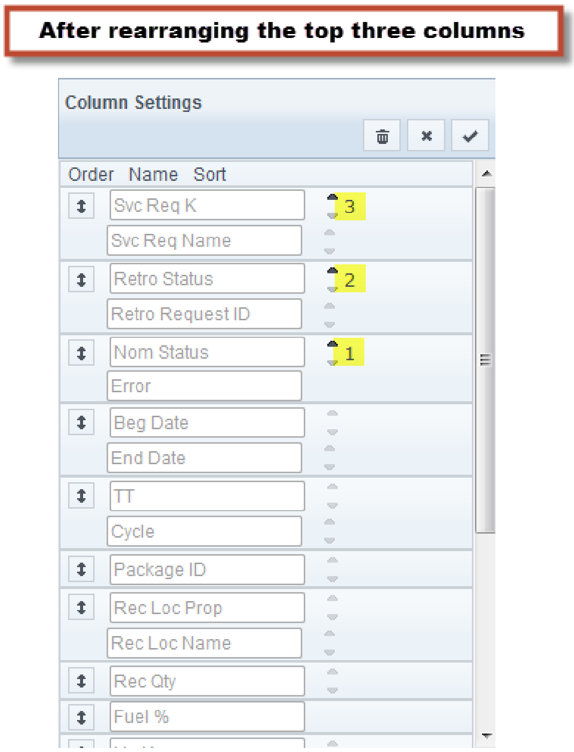
Within the data table, you can set the order of the columns and sort order of the data by clicking "Data Configuration Icon ".



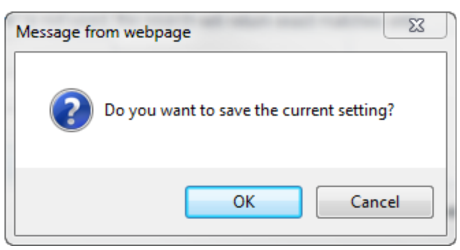
A list of your columns will pop up in its current order.



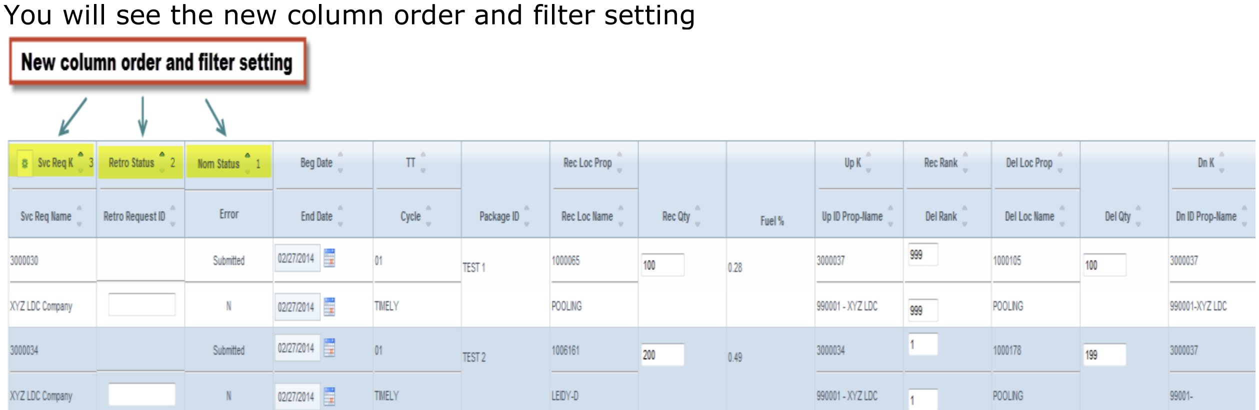
What it looks like after rearranging the top three columns:



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

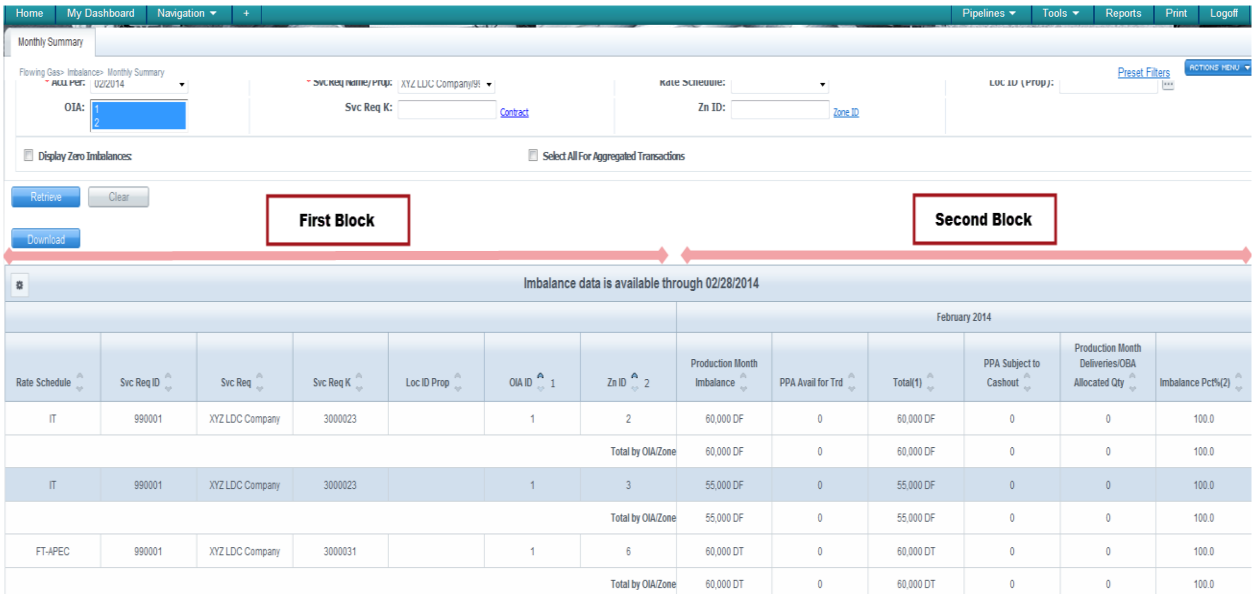


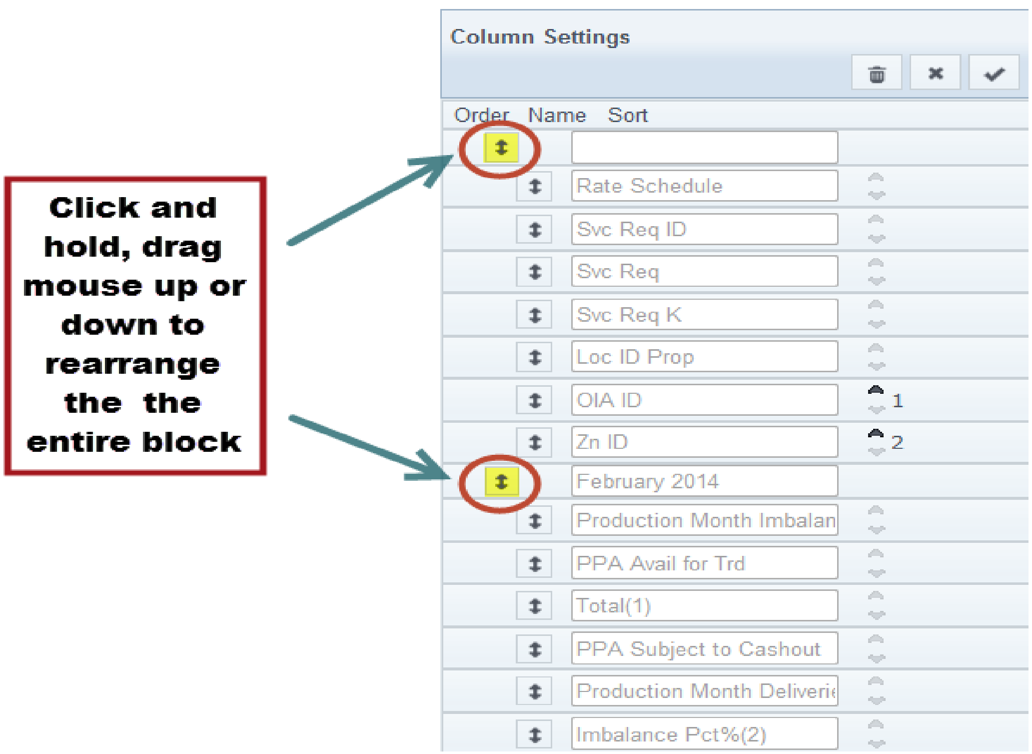
Reminder: This same method of data configuration preferences will be available on all of the pages* that have preset filters.

*Column order and column sorting preferences not available on the Bids and Offer pages at this time.

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.

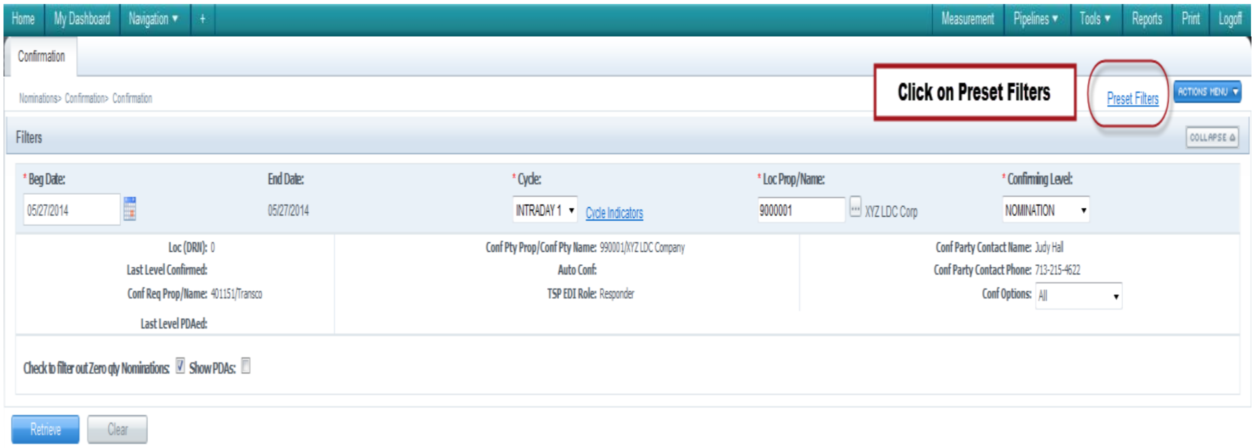


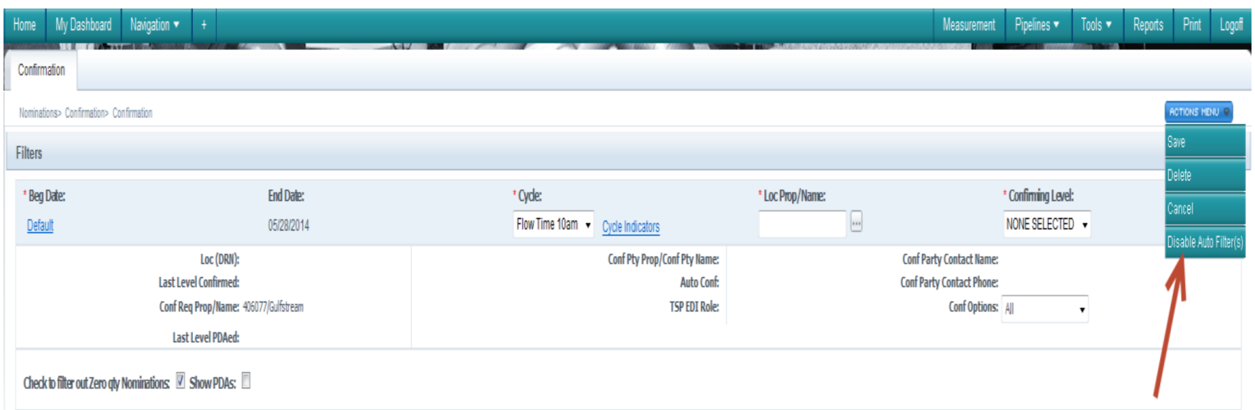


*For Monthly Summary Page - if a user saves ANY column reorder and/or sorting, the page will not display subtotals by zone.

Auto Refresh Confirmation/PDA

New ability to control the auto refresh feature on the Confirmation and PDA pages.





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.