Report Customization
Six LINK® reports can be customized by accessing the report customization page and selecting/entering a variety of search filters.

Customized Reports include:

- Month to Date Customer Contract
- Location Scheduled Quantity Detail
- LDC (Deduct) Location Confirmation Report
- Operator Allocation Report
- Service Requester Activity Allocation Report
- Upstream Entity Allocation Report

Reports can be customized either through Report Subscription or On-demand (Report Submittal) screens.

- Report Subscription limits you to the date range on the Subscription page.
- Allows customers to subscribe to a customized report.
- On-demand (Report Submittal) screen allows a date range to be entered.
Report Subscription is located under Reports from the Customer Activities menu. The options available for Report Subscription are Available Reports, Subscribed Reports, and Report Tracking.
To access functionality that will allow a report to be customized and subscribed to, select “Available Reports”. The “Available Report Subscription” screen allows a user to select from a list of existing reports and filter the list by Business Unit, Functional Area and Report Name.
To subscribe and customize the report put your cursor on a report and click the “Subscribe” button.
After pressing the “Subscribe” button, the “Create Report Subscription” page will display. From this screen the user can: 1) Customize Report 2) Run Report On-demand or 3) Subscribe to Report. Entering a Subscription Name allows the user to customize and subscribe to this report more than once.
The screen allows customers to enter appropriate filtering criteria. Some reports allow for multiple filter selections. Select “Add” or press the enter key to add filtering criteria.

Customers can use the lookup and select Service Requester Abbreviations or Customers can enter multiple Service Requester Abbreviations by entering a pound (#) sign in between each Service Requester Abbreviations.

Multiple Service Requester Contracts, Rate Schedules and/or Location Props can be entered by using a comma (,) in between each contract, rate schedule or location prop.
When customizing the report customers have an option to select the Report Type of “Summary or “Detail”.
To customize a report click the “Customize” button.
After pressing the “Customize” button, the “Create Report Subscription” page will be displayed. From this screen the user can configure various search filters to customize a report.

Quantity Filters: Customers can select from Equal to, Greater than, Less than and/or Not Equal to. This will allow customers to filter on quantities greater than and less than.
Customers may select and enter search filters and then click the “Add “ button. Once a search filter is added, it will display in the box (customer filters) at the bottom of the screen. Customers can filter on multiple Upstream Names, Downstream Names, and Service Requester Contracts by adding one at a time. If there is an asterisk (*) in front of a label a lookup screen is available.

Filters will display in the bottom box

Lookup Available

Click Add
Other reports such as “Month To Date Customer Contract” will include filter by Up K, Dn K, Dn Name, or Pkg ID etc. When filtering using the UP K or Dn K fields some activities will have the Up K and/or Dn K field left blank. To filter either field where it is either “Equal to” or “Not Equal to” a blank, the user should click the space key once and then hit the “Add” button.

The above will display in the box.
Once search filters are added click the “Submit” button.
Once the “Submit” button is pressed, the user is returned to the “Create Report Subscription” page and an “Accepted” message will quickly display at the top left of the screen. This lets the user know the search filters are accepted. The customized search filters are displayed in the box labeled “Custom Filters”. The user can run the report on-demand and/or subscribe to the report. To run the report on-demand, click the “Run Report” button.
After selecting criteria on the Create Report Subscription page, click the “Subscribe” button to subscribe to the report. Once the “Subscribe” button is clicked, the system automatically goes to the “Subscribed Report” screen.
From the “Subscribed Reports” screen, the user is allowed to edit, unsubscribe, suspend or activate a subscription. To do so, select the row and click the “Sel” box on the specific report and click the specific function button (Edit, Unsubscribe, Suspend or Activate).
To review history of generated reports select “Report Tracking” from the Reports menu. Put the cursor on the report you want to view click the “View” button. The system will retrieve an on-line report that was previously sent to the user.
From the menu the user can select a report by going to Reports, selecting the category the report is under, and clicking the report.

For this example, the Operator Allocation Report is being retrieved. From the menu tree, select Reports, Flowing Gas, Allocation and Operator Allocation Report.
Customer enters the date or date range they are configuring. Next the criteria is populated and the “Customize” button is selected. This will take the user to the “Customize Report Subscription” page.
Customer enters search filters and click “Add”. Search filters are displayed in the box at the bottom of the screen. Click the “Submit” button to submit filters and on the top left a “Report Submitted” message will quickly display.