



# Report Subscription Tutorial

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# Report Subscription

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## 1.0 Description

The Report Subscription enhancement in CSI allows Southern Star’s customers to schedule a selected number of CSI reports (with their saved parameters) to be automatically generated and either emailed to the customer’s email inbox or sent to a file transfer protocol (“FTP”) location. From the list of available reports, the customer controls which reports they want generated, enters the applicable parameters, and controls the frequency the report is generated and where the report is delivered. The same report can be scheduled multiple times using different parameter options.

## 2.0 Access & Security

The Report Subscription screens are available to any user with a valid CSI account. The available reports for users to schedule are based on the user’s role in CSI and the user’s security with the selected company/customer.

The Report Subscription screens are accessed from the Profile section of the Customer Activities menu within CSI. The link to Report Subscription is listed under the Profile link as follows:

- Profile
  - My Profile
  - Password
  - Report Subscriptions**

## 3.0 Subscribing to CSI Reports

### 3.1 Searching for available reports to schedule

Under Customer Activities website in CSI click on “Profile” then click on “Report Subscriptions.”

This action will bring up the Report Subscription search screen that contains the user’s contact name, active date, and available customer names to select from. Note that if the user is a valid contact or agent for multiple companies within CSI, the user needs to choose which customer they want to subscribe reports for using Report Subscription.

SOUTHERN STAR  
CENTRAL GAS PIPELINE  
TSP 007906233

Profile : Report Subscriptions

Search Details

Retrieve Create New Scheduled Job View/Edit Report Scheduled Job

Search Parameters

Contact: USER 2, CSI

Active Date: 7/28/2012

Customer: Pipeline A

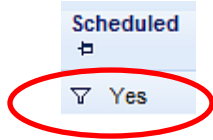
Reports Available for Scheduling

Once the intended company has been selected, click on “Retrieve” in the top right corner. The “Reports Available for Scheduling” will display on the screen. The reports are dependent on the user’s role that is set up in CSI. The grid will indicate if the report is currently scheduled, the applicable “job begin date”, “job end date”, along with the CSI Report name and the “Job Description” which is provided later by the user. A user’s scheduled job listings are customer specific. For example, a CSI user or agent for multiple customers will have a separate scheduled job listing for each customer.

Reports Available for Scheduling

	Scheduled	Report	Job Description	Job Begin Date	Job End Date
1	No	CSI076 Operator Scheduled Quantities			
2	No	CSI075 Shipper Scheduled Quantities			
3	No	CSI072 Measurement Volume Statement			
4	No	CSI069 Measurement Volume Daily			
5	No	CSI068 Measurement Volume Hourly			
6	No	CSI067 Measurement Volume Data Extract CSV Daily			
7	No	CSI058 Operator Location Allocation Detail			
8	No	CSI054 Shipper Contract Balance Detail by Day			

Note that the grid can be filtered and rearranged per the user's input. For example you can filter the first column "Scheduled" to "is equal to Yes," to filter the results for reports you have scheduled

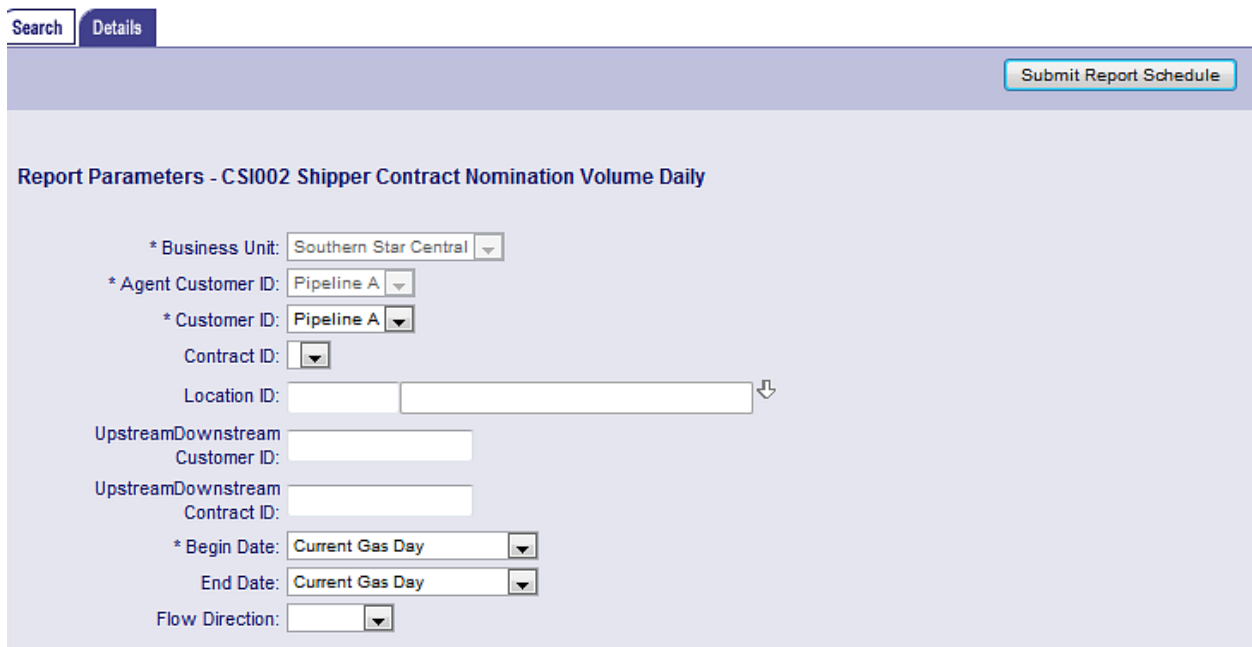


### 3.2 Scheduling a report

Under "Reports Available for Scheduling," highlight the report you would like to schedule and click on "Create New Scheduled Job" in the top right corner of the screen. This action takes the user to the detail screen for the selected report.

### 3.3 Setting the parameters

The user should fill out all required parameters for the selected report. These parameters will stay in effect unless edited by the user. The user has multiple options when inputting the "Begin Date" and the "End Date." It is important the user inputs the dates correctly. Some of the options include :Current Gas Day," "Prior Gas Day," "Next Gas Day," "First Day of Current Month," "Last Day of Current Month," etc...



Search Details

Submit Report Schedule

Report Parameters - CSI002 Shipper Contract Nomination Volume Daily

\* Business Unit: Southern Star Central

\* Agent Customer ID: Pipeline A

\* Customer ID: Pipeline A

Contract ID:

Location ID:

UpstreamDownstream Customer ID:

UpstreamDownstream Contract ID:

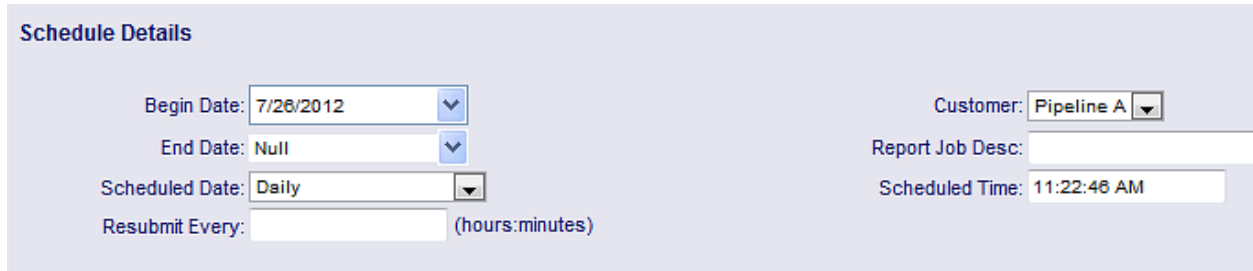
\* Begin Date: Current Gas Day

End Date: Current Gas Day

Flow Direction:

### 3.4 Setting the frequency

The user needs to complete the “Schedule Details” section that includes the “Begin Date,” “Scheduled Date,” “Customer,” and the “Scheduled Time.” The “Resubmit Every” field, “End Date,” and “Report Job Desc.” are optional fields that provide further scheduling details. Note that the “Report Job Desc. Field can be unique for each user. It is intended to be used as a quick reminder to the user on the search screen. The “Scheduled Date” field lets the user control the frequency of the report generation (Example: “Daily,” “1<sup>st</sup> workday of the month,” “Tuesday,” etc...). Also, note you can hover over the fields in the “Scheduled Details” section and a helpful tip will display that will describe the fields intent.



**Schedule Details**

Begin Date: 7/26/2012

End Date: Null

Scheduled Date: Daily

Resubmit Every: (hours:minutes)

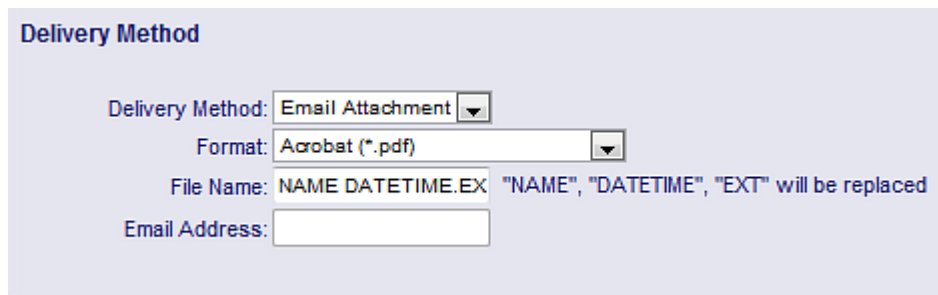
Customer: Pipeline A

Report Job Desc:

Scheduled Time: 11:22:46 AM

### 3.5 Setting the delivery method

The user needs to complete the “Delivery Method” section. The user has the choice of the delivery method as either an Email Attachment or a File Transfer Protocol (“FTP”) delivery. There are multiple options for the format of report file (acrobat, word, excel, rich text, text, common delimited). Next, the user needs to enter the “File Name.” If you need to change the recipient’s “Email Address”, you need to submit a request to your Southern Star customer service representative or to Contract Administration to update your contact information in CSI. Also, note you can hover over the fields in the “Delivery Method” section and a helpful tip will display that will describe the fields intent.



**Delivery Method**

Delivery Method: Email Attachment

Format: Acrobat (\*.pdf)

File Name: NAME DATETIME.EX "NAME", "DATETIME", "EXT" will be replaced

Email Address:

Once the user has completed these sections, click “Submit Report Schedule” in the top right corner of the screen. The scheduled report will now show up on the search screen with the “Scheduled” column as “Yes.” Note that you can schedule the same report multiple times with different saved parameters. The user just needs to find the report with the “Scheduled” column marked as “Yes,” again in the search list

and click on “Create New Scheduled Job” button and set the parameters, frequency, and delivery method for the 2<sup>nd</sup> version of the report.

To edit a report that has already been scheduled, the user needs to find the report in the search screen, click on the report then click the “View/Edit Report Scheduled Job” button in the top right corner of the screen.

#### **4.0 Additional Reports**

Additional CSI reports can be made available for Report Subscription based on customer demand. Please contact us at the CSI Help Desk number (270-852-5123) with any additional CSI report requests.