

Copy a Nomination

The Copy Nominations feature gives you the ability to copy a previous nomination to start a new one. You will want to create a new nomination for the beginning of a new month. Data can be edited once it is copied from the previous nomination. This function is performed from the nomination transaction screen. You can access the nomination transaction screen directly from the view Nomination Transaction link in the Nomination widget, which displays for the Shipper persona, or by using the main menu. In this document, we will access it using the main menu.

1. Select the **Main Menu** icon.

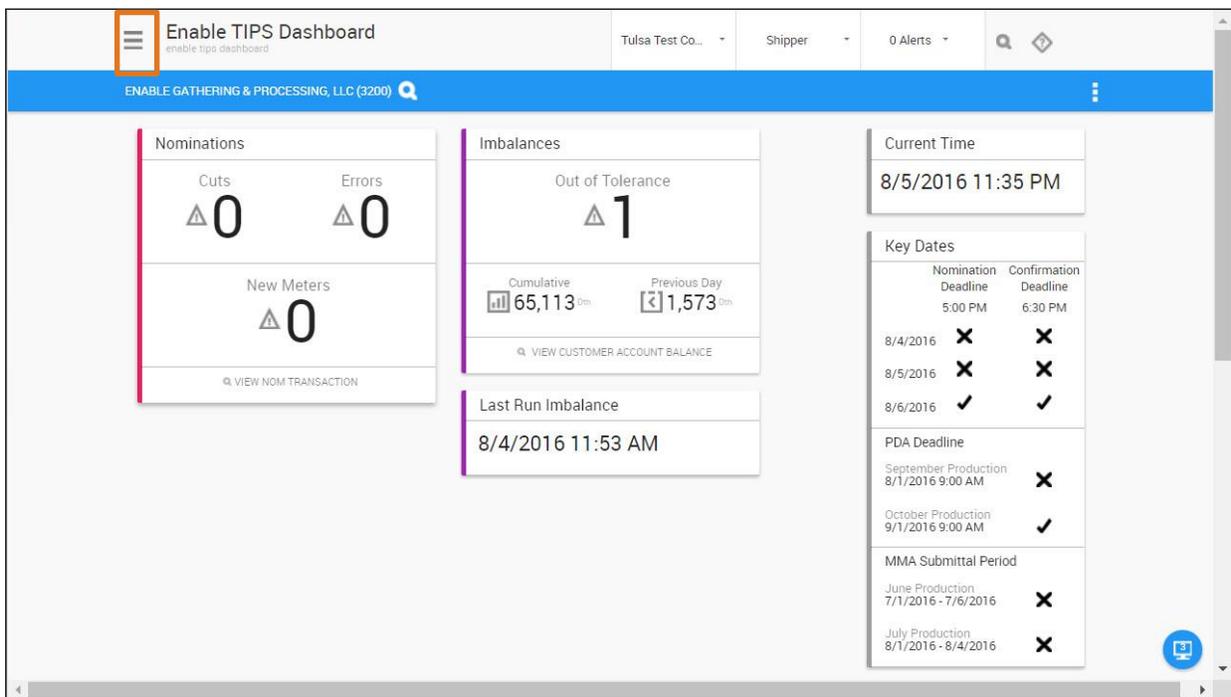
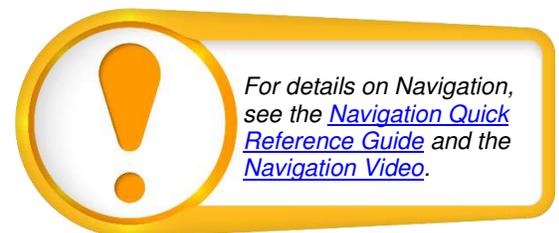


Figure 1: Main Menu icon



2. Select **Nominations**.
3. Select **Nominations** sub-heading.
4. Select **Nomination Transaction**.

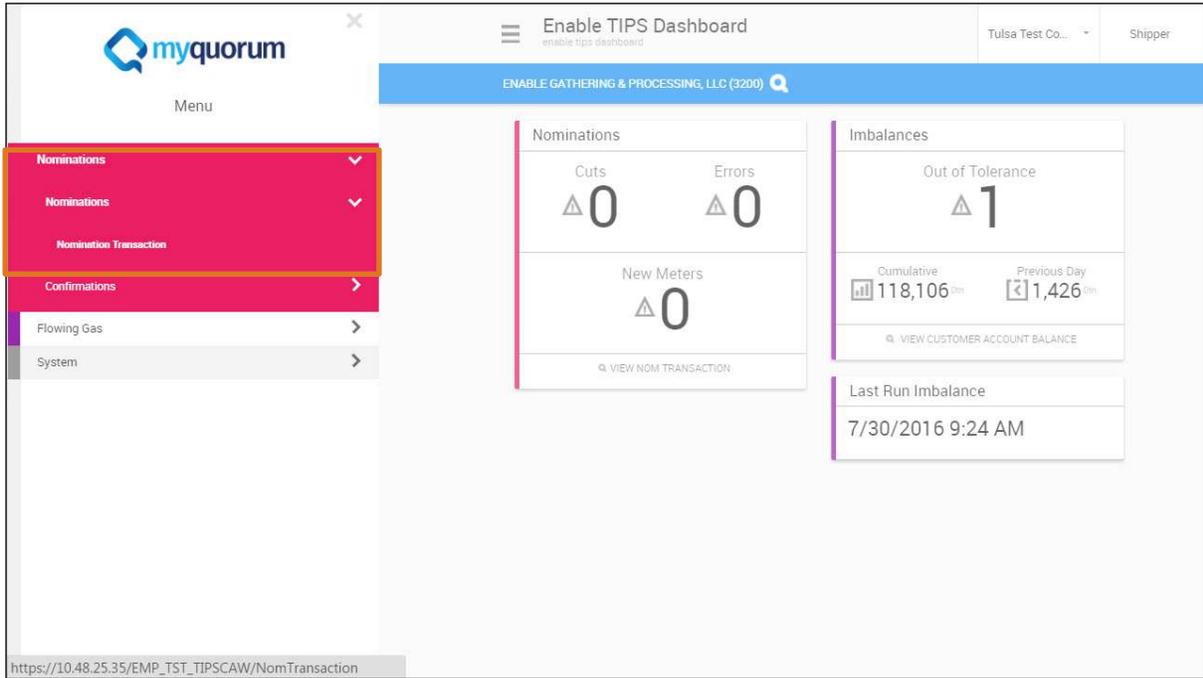


Figure 2: Nomination Transaction

5. Verify **Company**.

- Note:**
- The company information defaults based on what is selected in the Action Bar on the myQuorum homepage. Use the dropdown to change the company if needed.
 - The Service Requestor information will default for your account.

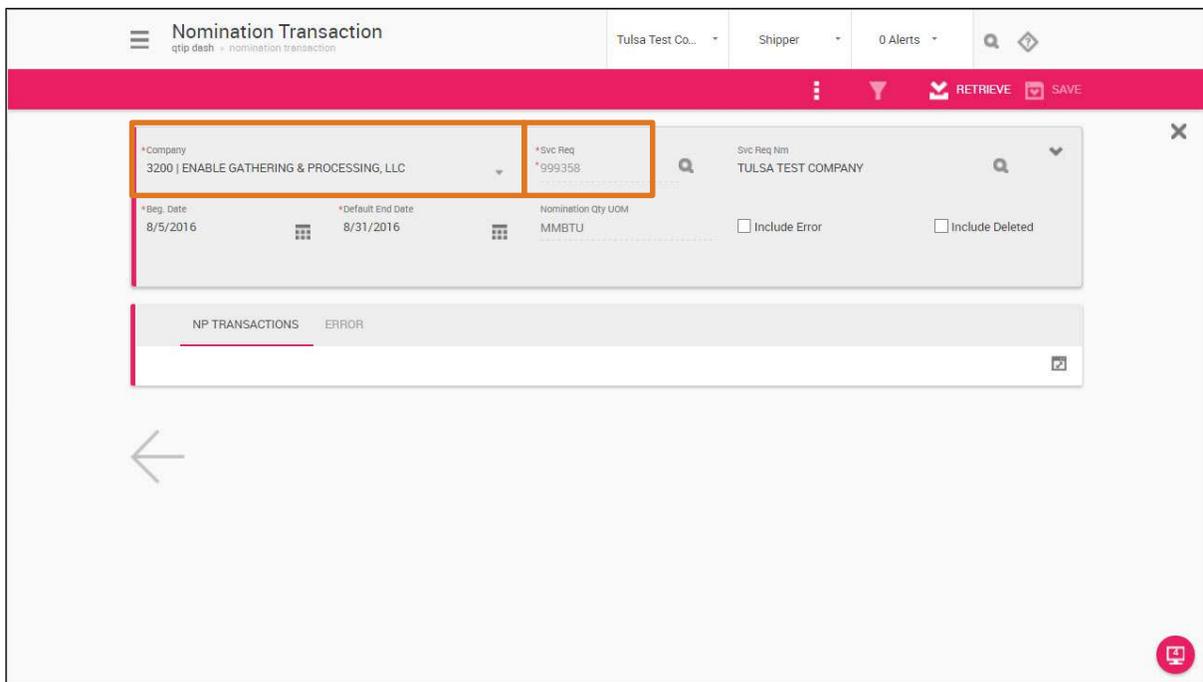


Figure 3: Verify Company

6. Type in the beginning date of the nomination you want to copy, or select it using the calendar icon.
Note: The end date will automatically populate to the last date in the month. It can be adjusted, if needed.
7. Make sure the **Include Error** checkbox is blank.
Note: Only valid nominations can be copied.

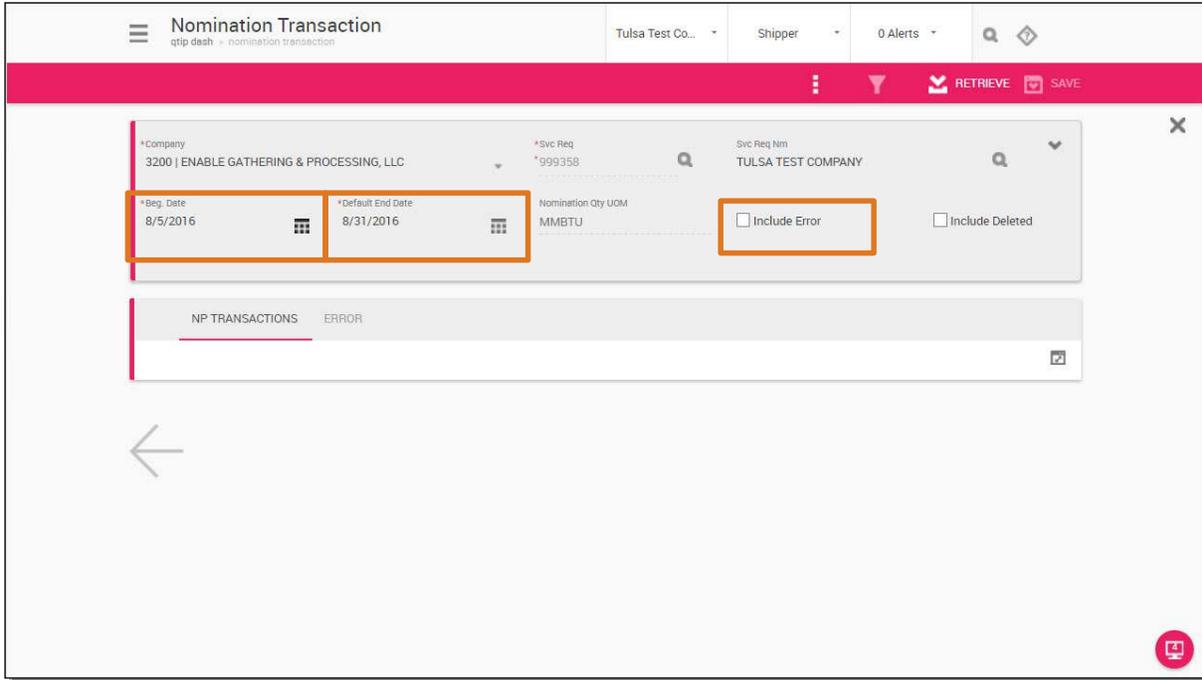


Figure 4: Beginning Date

8. Select the **Retrieve** button.

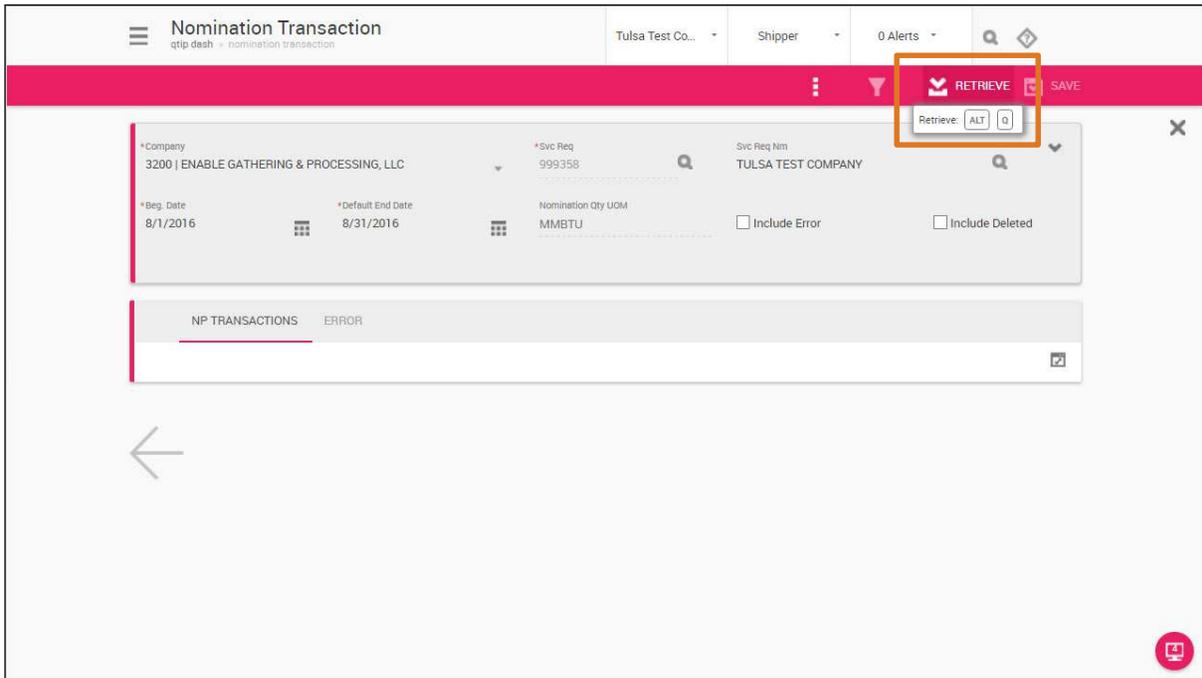


Figure 5: Retrieve button

Upon success, you will see a brief **Query Successful** message display in the lower left corner of the screen.

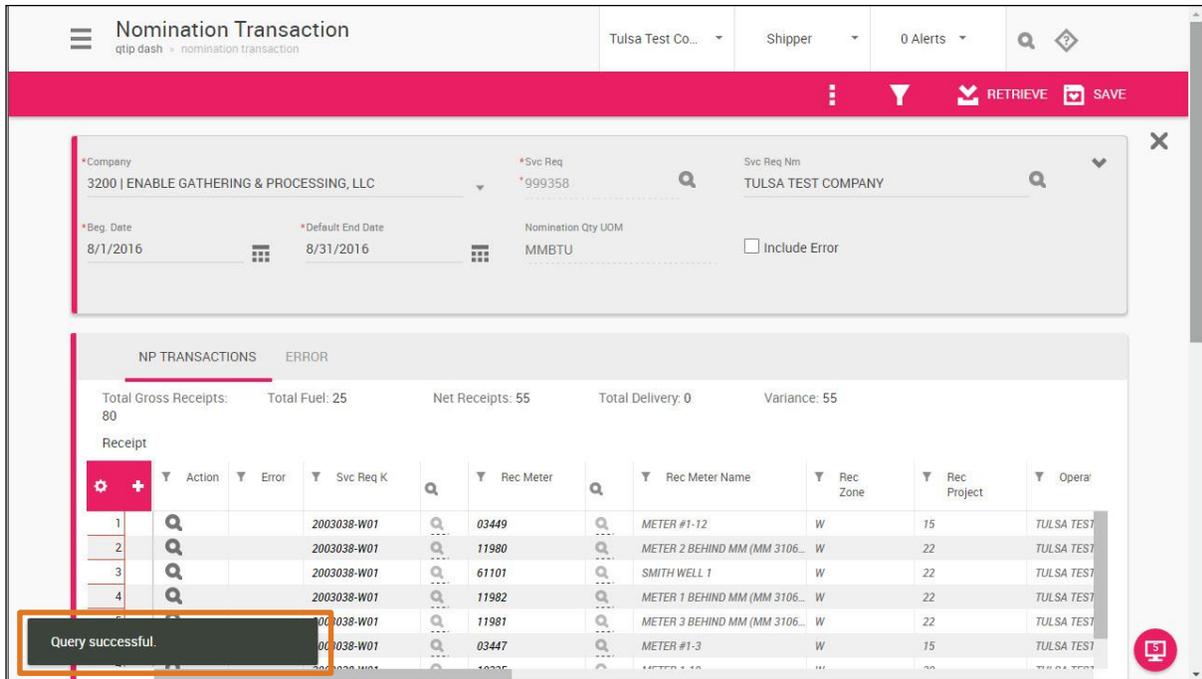


Figure 6: Query successful message

9. Select the **Overflow** menu icon.
10. Select **Copy**.

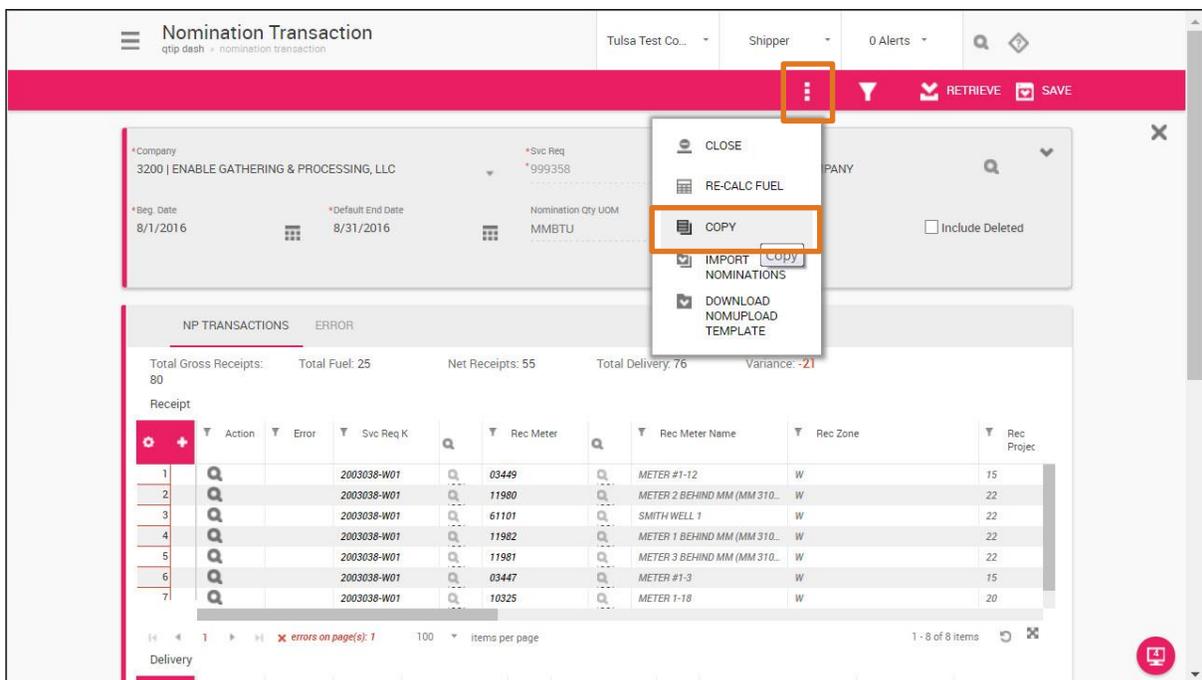


Figure 7: Overflow menu icon

The Nomination Copy screen displays.

11. Verify dates.

Note: The date range will default to the next available month. The nominations from the Beginning Gas Day that you previously retrieved are what will be copied to each of the days indicated in this range.

12. Select the **Values to be Copied** option.

Note: There are four copy options available for the nomination.

- The first option, *Zero for Quantity and 01 for Rank*, will copy all existing receipt and delivery meters and make all of the nomination quantities zero.
- The second option, *Values for Selected Begin Date*, will copy all existing receipt and delivery meters and their existing nomination quantities.
- The third and fourth options copy either the receipt information, or the delivery information, AND the existing nomination quantities for the option selected. Please ask your Scheduler for more information.

Most of the time the second option, *Values for Selected Begin Date*, will be used.

13. Select the **OK** button.

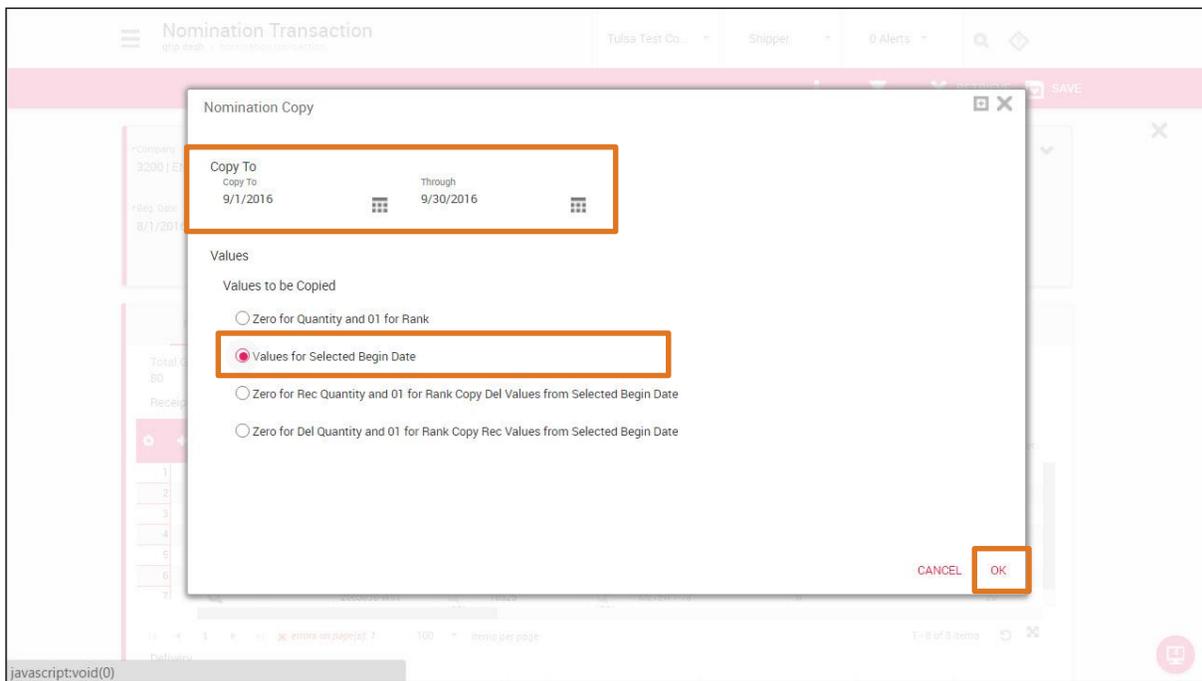


Figure 8: Nomination Copy

This opens the newly copied nomination in the Nomination Transaction screen. The new date range will display in the header. It is recommended to leave the entire month in this range until the record is saved. The copied nomination information display in the Receipt and Delivery sections, as applicable.

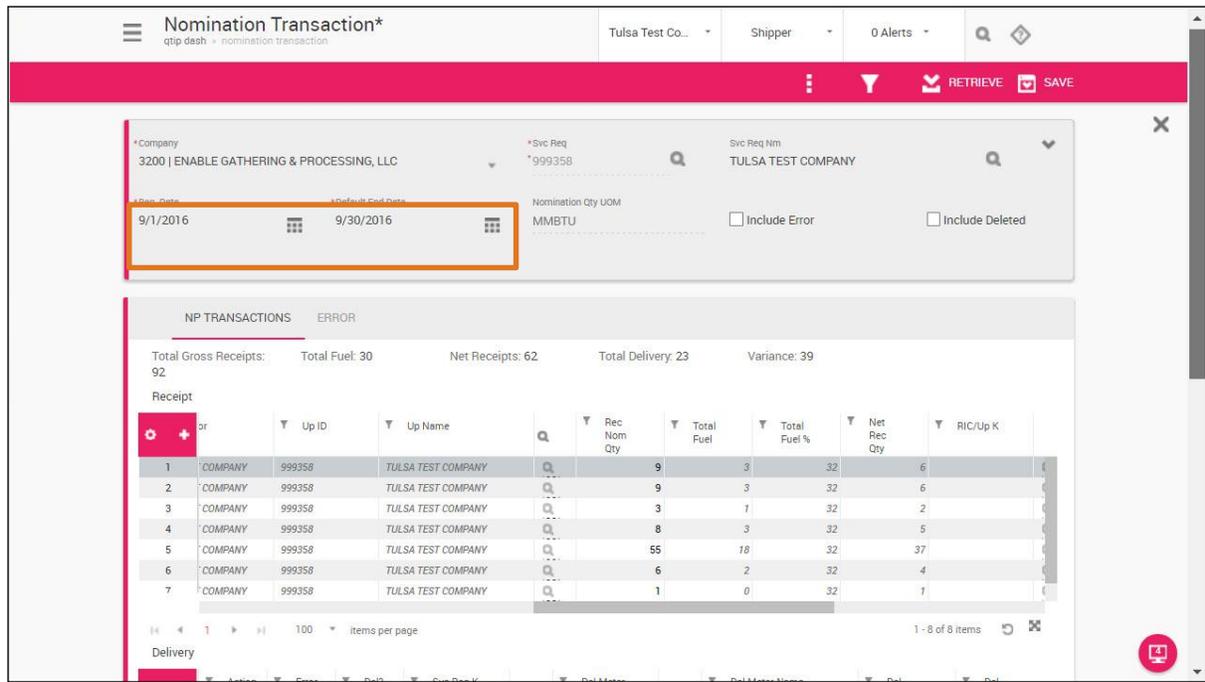


Figure 9: Copied nomination

14. Edit information, as needed.

- Note:**
- Please see the *Update Nominations* training material for assistance on editing your nomination.
 - It is important to know this record is in an edit status and has not been saved yet.

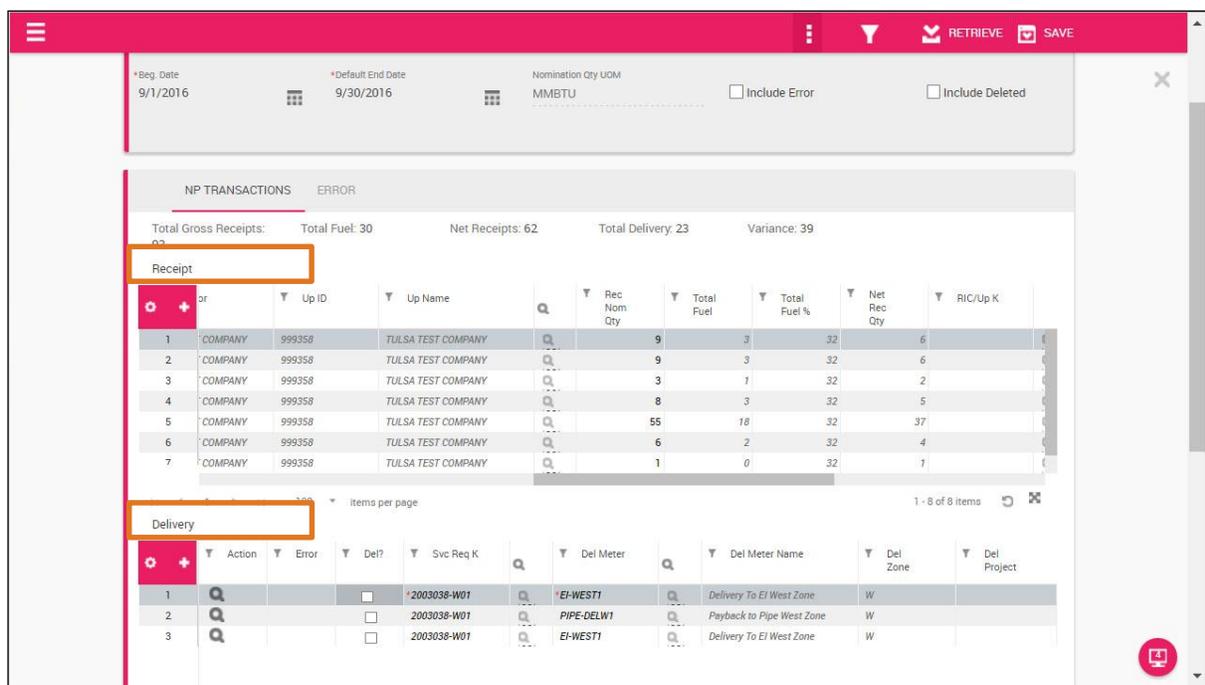


Figure 10: Edit information

Note: If you copied the wrong nomination or information, you do not have to save the record. You can use the Overflow menu and select the Close option. Skip ahead to Step 18 if the information/nominations are correct.

15. Select the **Overflow** menu.
16. Select **Close**.

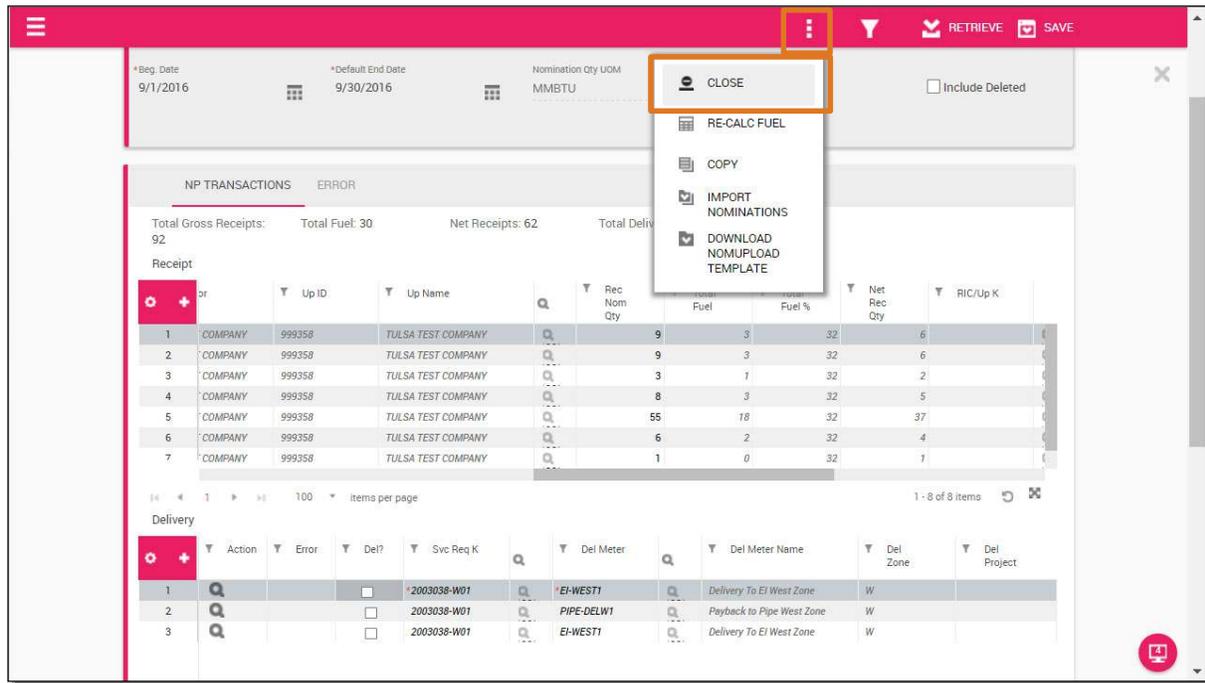


Figure 11: Overflow menu

17. Select **Cancel**.

Note: A prompt displays advising you that pending changes will be lost. You can select Proceed to close, or Cancel if you wish to return to the record.

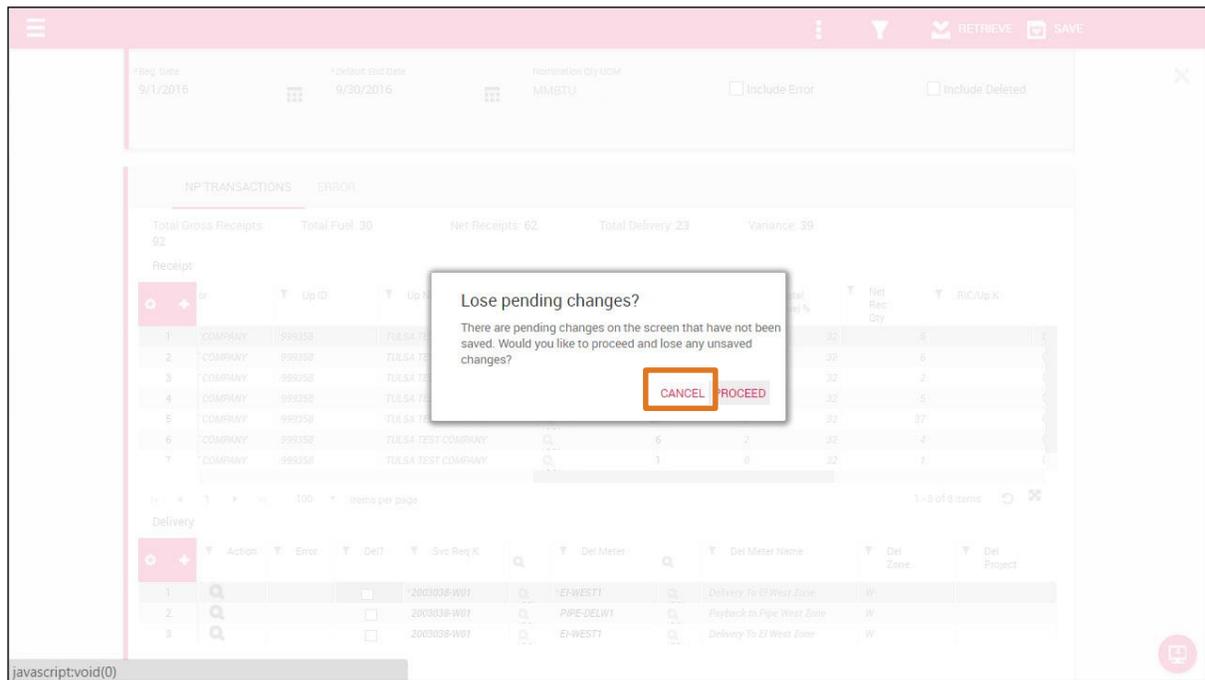


Figure 12: Lose pending changes

18. Select the **Save** button.

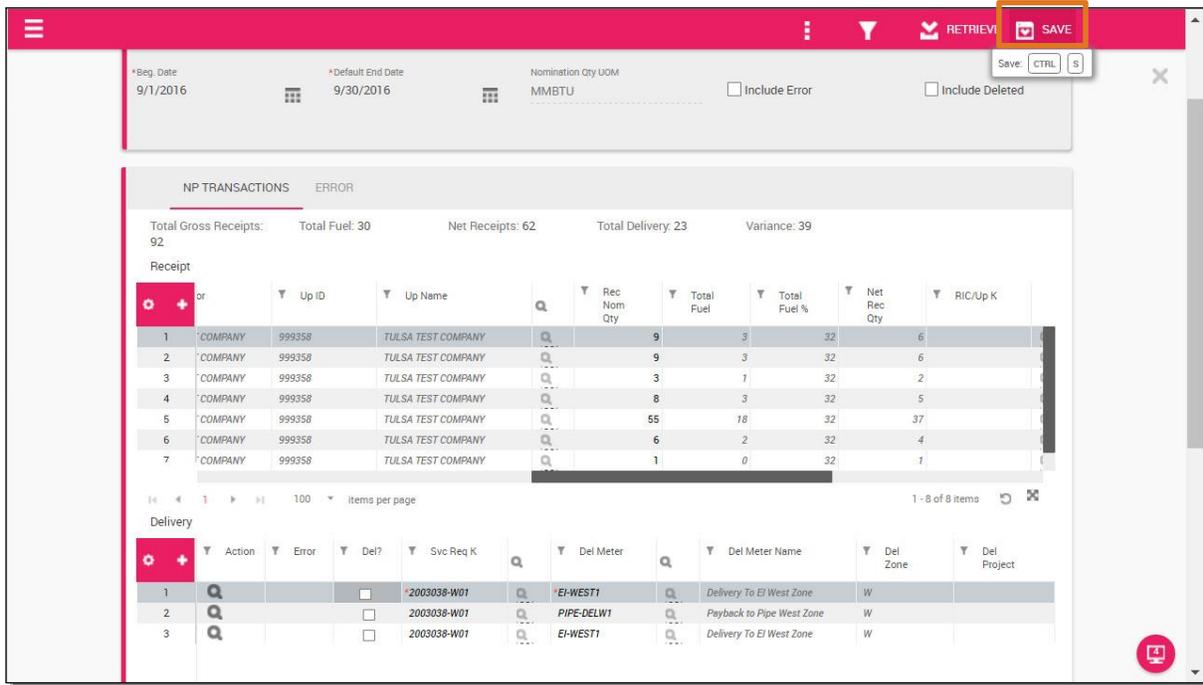


Figure 13: Save

You will see a brief Nominations Submitted Successfully message in left corner of the screen.

19. Select **X** to close this screen and return to the dashboard.

Note: Remember, if you do not choose to close this screen it will stay active in your Open Screens.

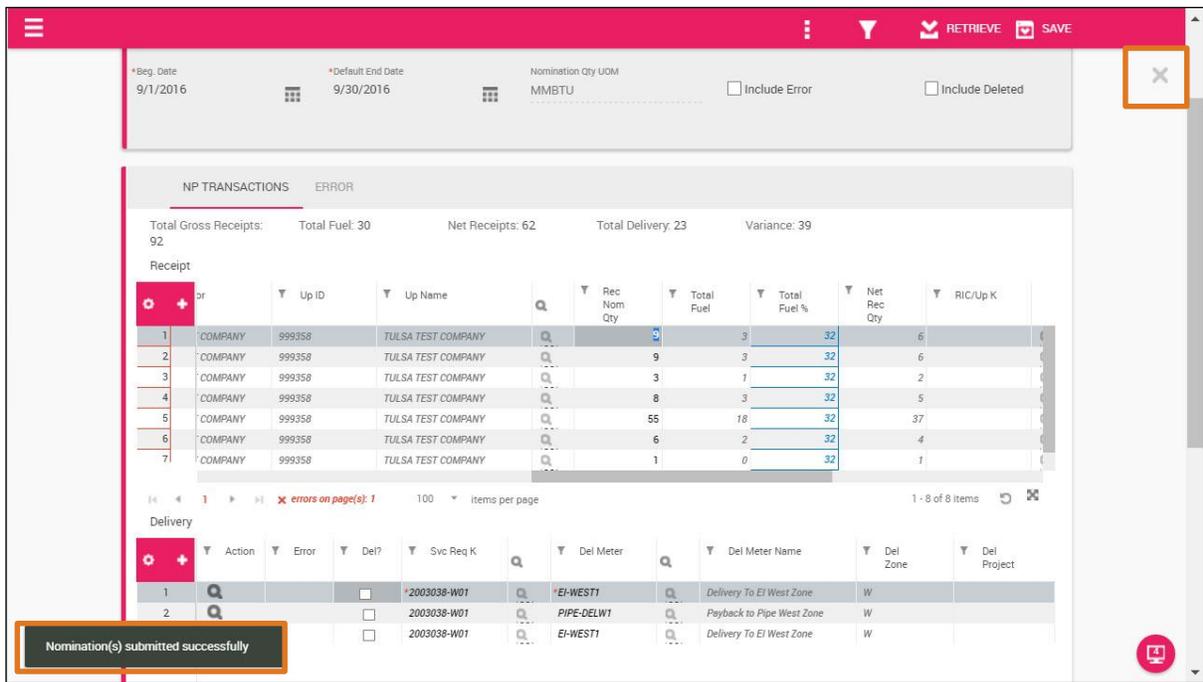


Figure 14: Nominations submitted successfully message

This concludes the Quorum CAW Copy Nomination training.