Ontario
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Pivotal UX User Guide for Natural Gas Distributors

Prepared by OEB Staff

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1. Purpose

The OEB's 2019-2022 Business Plan, together with OEB's Strategic Blueprint, emphasises on an efficient, innovative and consumer-centric approach. Pivotal UX supports the OEB's goals to modernize, and make regulatory systems robust and more efficient.

The system provides an intuitive interface to reduce reporting time, increase efficiency and make the RRR filing process more user friendly.

Immediate benefits offered by Pivotal UX include:

- Self-service password control
- Smart forms that provide pop-up alerts describing any reporting errors and locating where the error is made
- Auto-calculated fields
- Flexibility to file RRR via Microsoft Edge/Internet Explorer or Google Chrome
- Ability to save any work in progress
- Ability to export or print RRR reports in editable or read-only formats such as MS Word, MS Excel, RTF, PDF, CSV, XML and Crystal Reports
- Ability to export data from the forms to MS excel

The UX platform also enables the opportunity for future enhancements through upgraded features that will improve user experience.

2. Login and Change Password

The Pivotal UX can be accessed through either Microsoft Edge/Internet Explorer 10+ or Chrome 38+. The Pivotal UX login webpage is shown in Figure 1.

Figure 1: Pivotal UX Login
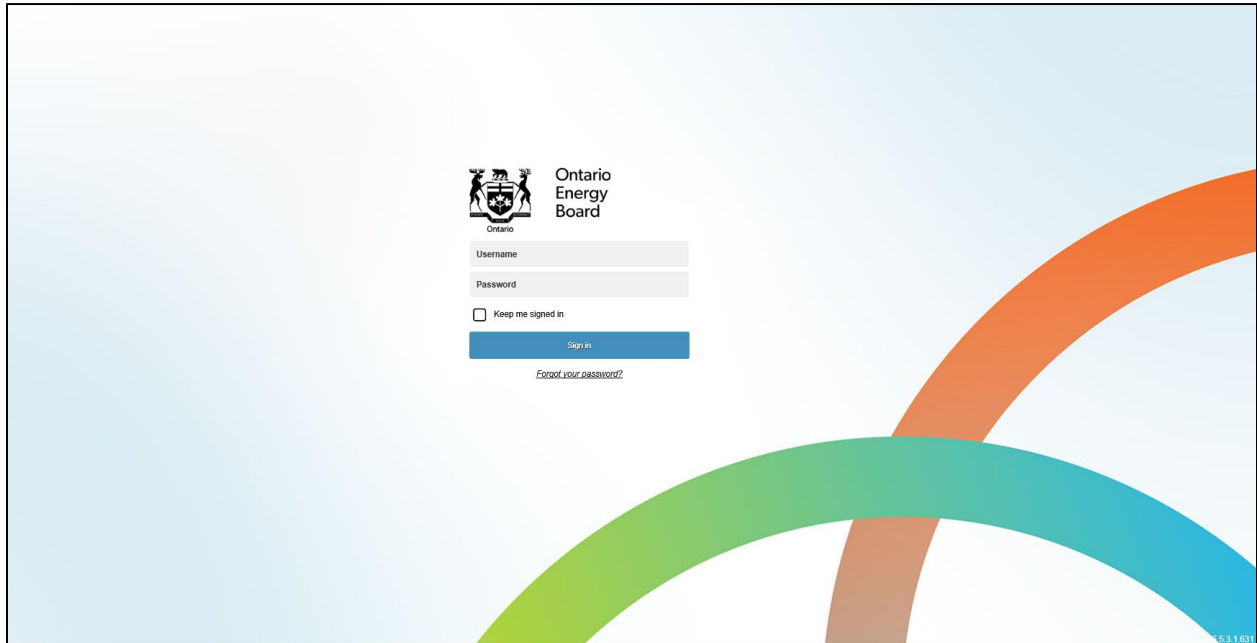
URL

Gas distributors can add this link (https://p-pes.ontarioenergyboard.ca/PivotalUX/) to their preferred browser to access the Pivotal UX login webpage.

Login

Existing RRR users can use their e-Filing Services user credentials for logging in to Pivotal UX.
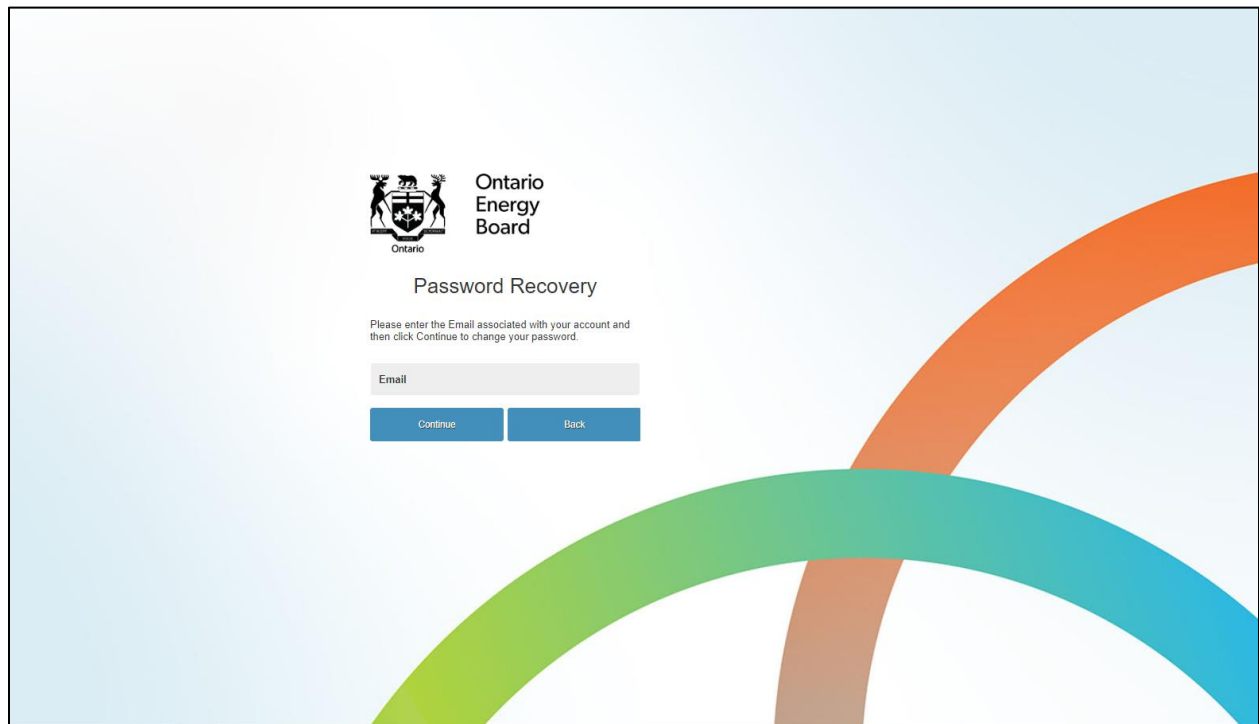
Change Password

Users can follow these steps to change the password in Pivotal UX.

Step 1: Click on "Forgot your Password" on the OEB's Pivotal UX login webpage.

Step 2: Enter the email address registered with the OEB as shown in Figure 2.

Figure 2: Password Recovery

Step 3: An email will then be sent to the registered email address containing more information about how to change the password. Click on the link and change the password.

3. User Support

Users have access to support such as Pivotal UX User Guide and training videos in Pivotal UX. All the user support materials, including this user guide, can be viewed in the Action Center.

By clicking on the relevant links, the user can either view the web version of the user guide or watch the various training videos. See Figure 3.

Figure 3: User Support
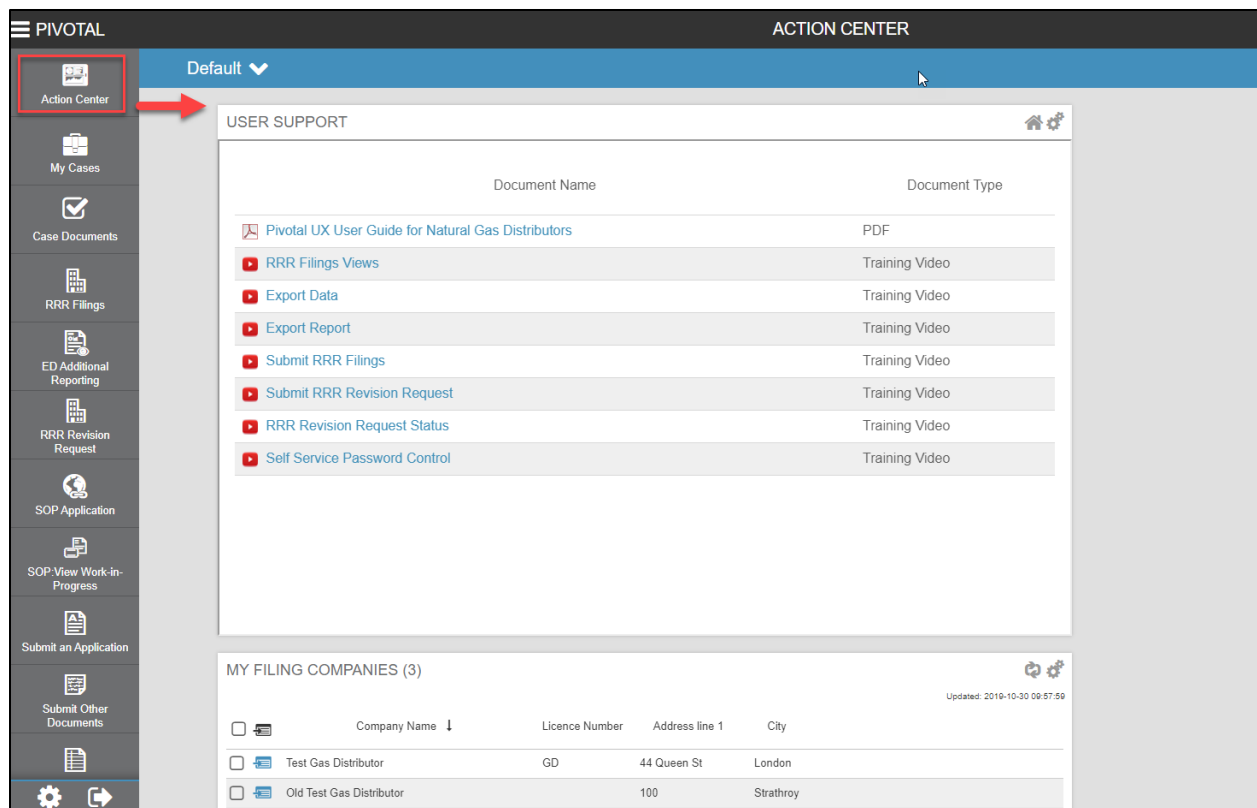
What is Action Center?

The purpose of Action Center for accessing user support materials and directly go to the desired filing company. The "Action Center" is the top most button located on the navigation bar. The purpose of navigation bar is explained in the following section.

4. RRR Filings Views

The following section outlines the different views of RRR Filings in Pivotal UX.

4.1. Choose Reporting Period

After logging in with the registered username and password, click on the "RRR filings" button located on the navigation bar (#1). Click on the company name from the list of your filing company names. This will show the company details and reporting years as shown in Figure 4.

Figure 4: Choose Reporting Period
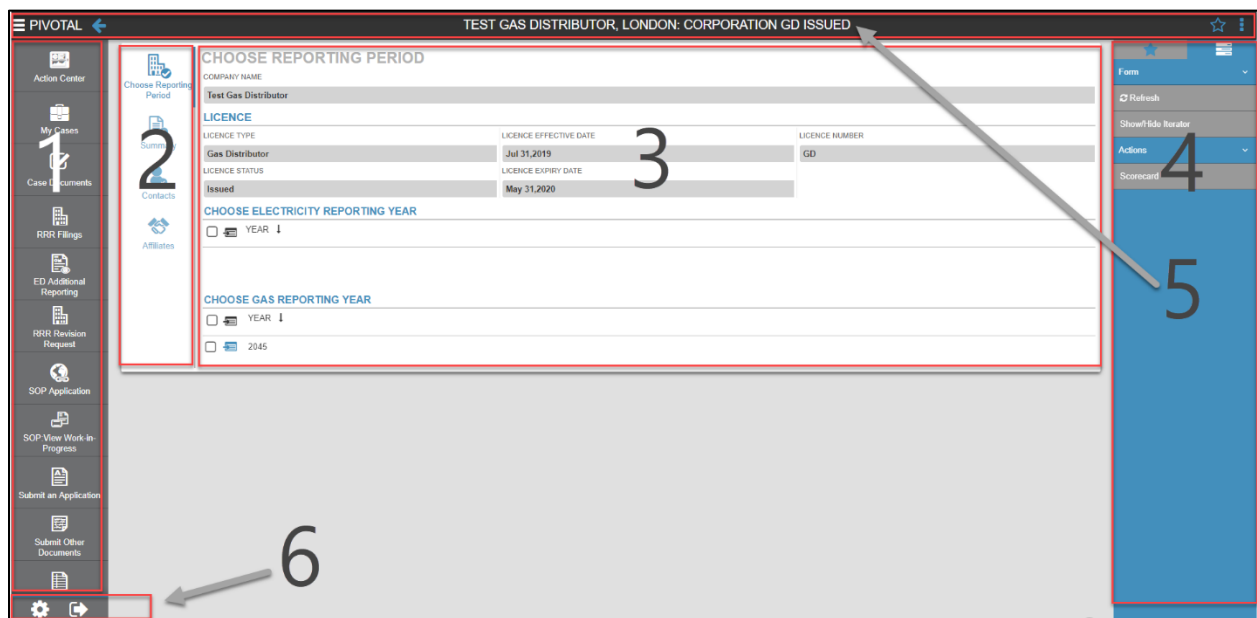
1. This is a navigation bar which will be present throughout the RRR filings or revision request process. Through this navigation bar users can perform tasks such as RRR filing, RRR revision request, etc. At the top of the navigation bar, there is a feature titled "Action Center", which allows the users to create a custom dashboard to track any of their RRR data. Additionally, the Action Center also houses training videos on Pivotal UX.

2. This is a navigation bar and features four options namely Choose Reporting Period, Summary, Contacts and Affiliates. The options are briefly described below:

Choose Reporting Period: For accessing RRR forms click on "Choose Reporting Period". This will then prompt the user to click on the desired RRR Reporting Schedule and finally the annual and quarterly RRR filings. This RRR navigation bar will disappear once the reporting year from the "Choose Reporting Period" is selected.

Summary: Clicking on this tab will open company details, address and connections (details of registered users).

Contact: Clicking on this tab will open registered user's contacts.

Affiliates: Clicking on this tab will open affiliate names.

3. This displays the selected company's information and lists reporting years. Click on "Choose Gas Reporting Year" for accessing RRR forms. As an example click 2019 as Reporting Year for entering annual 2018 data.

4. This is a menu bar which will be present throughout the RRR filing or revisions request process. Through this menu bar users can perform tasks such as Add group, Form refresh and Print All. The add group feature lets the user arrange favorites under a designated group title.

5. This is the header which will be present throughout the RRR filing or revision request process, but will reflect the title of the current layout with information such as distributor name, type, filing year and form status. Notice that on the right hand side of the header there is "Add Favorite" and "Menu" option, whereas, on the left hand side there is "Navigation" and "Back arrow" option. The "add favorite" feature lets the user create a shortcut of the current view in the menu bar.

Also notice that an icon ( ) appears when the export data feature is selected. Clicking on this icon will open a sub-window from where the exported data can be downloaded. Pivotal UX does not keep a cache of exported files, hence the exported files are only available in the particular session.

6. Right under the menu bar there is the "settings" and "log out" option. Before logging out ensure that the filing is saved and the correct status ("Not Started", "Work in Progress" or "Submitted") is displayed.

4.2. RRR Reporting Schedule

After selecting a reporting year from "Choose Gas Reporting Year", the RRR reporting schedule will appear as shown in Figure 5. The purple callout boxes as shown in the figure below are provided here only for the purpose of explanation.

Figure 5: RRR Reporting Schedule
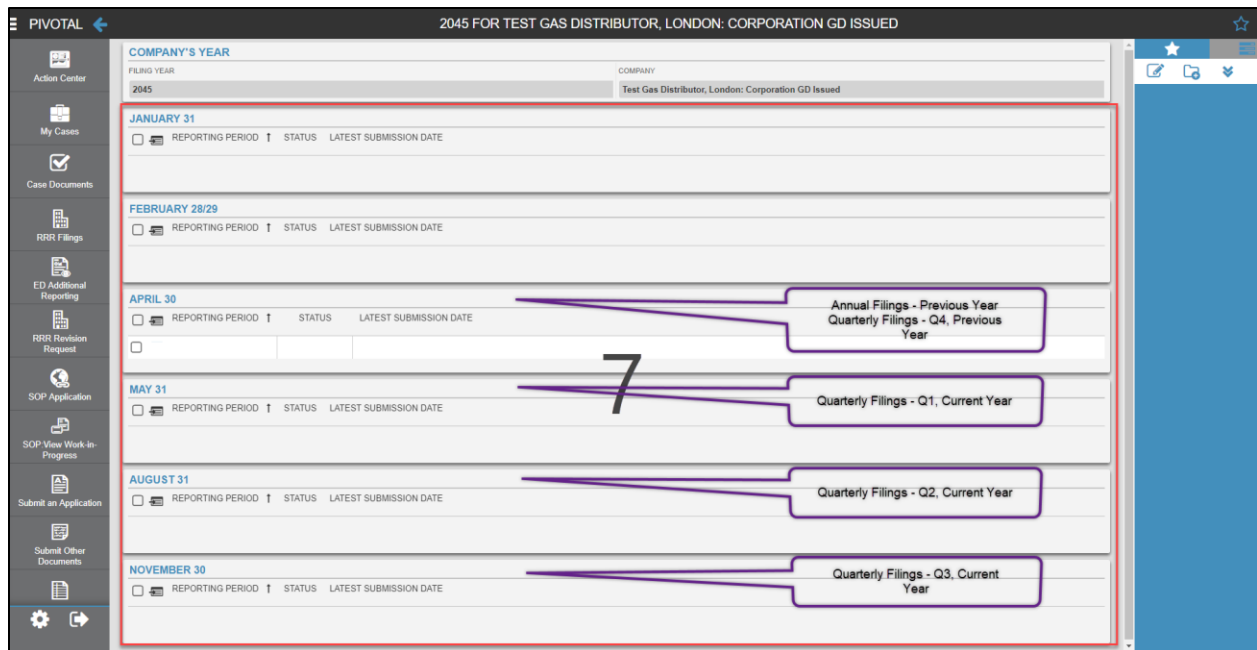
7. This section displays all the annual and quarterly reporting periods for the reporting year. This will also show the status of your RRR filings ("Not Started", "Work in Progress" or "Submitted") and latest submission date of the particular annual or quarterly RRR filings. Users can select the reporting period as follows:

  - The **April** folder to report the annual and Q4 filings for the previous year;
  - The **May** folder to report the Q1 filing for the current year;
  - The **August** folder to report the Q2 filing for the current year;
  - The **November** folder to report the Q3 filing for the current year.

4.3. RRR Forms

Once the required annual or quarterly filing is selected a screen for RRR filings appears as shown in Figure 6. The RRR navigation bar (#2) reappears to help navigate to the desired RRR form. Selecting one of the listed options will show the desired RRR filings (#8).

Figure 6: RRR Forms
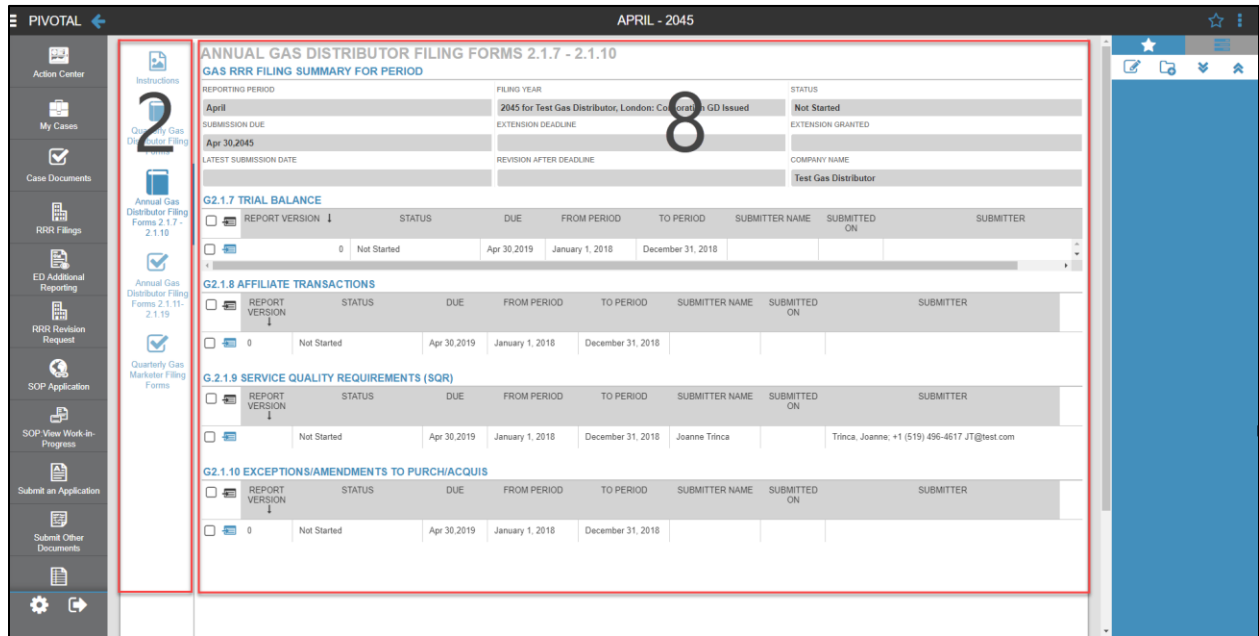
8. This is the section for accessing the desired form. For example, the above screenshot shows the "Annual Gas Distributor Filing Forms 2.1.7-2.1.10" from the RRR navigation bar (#2). Clicking the enter form icon (⬚) under any of the desired RRR form titles will open the standard form template for entering RRR data.

5.   Submit RRR Filings

The following section outlines the key activities performed when submitting RRR Filings.

5.1. Select Company Name

After logging in, the user has to select a company name from the list of companies and follow the steps given below.

Step 1: On the left-hand column, please select "RRR Filings".

Step 2: From the list of companies, select your company by clicking this icon ( ) beside the company name. See Figure 7.

Figure 7: List of Companies
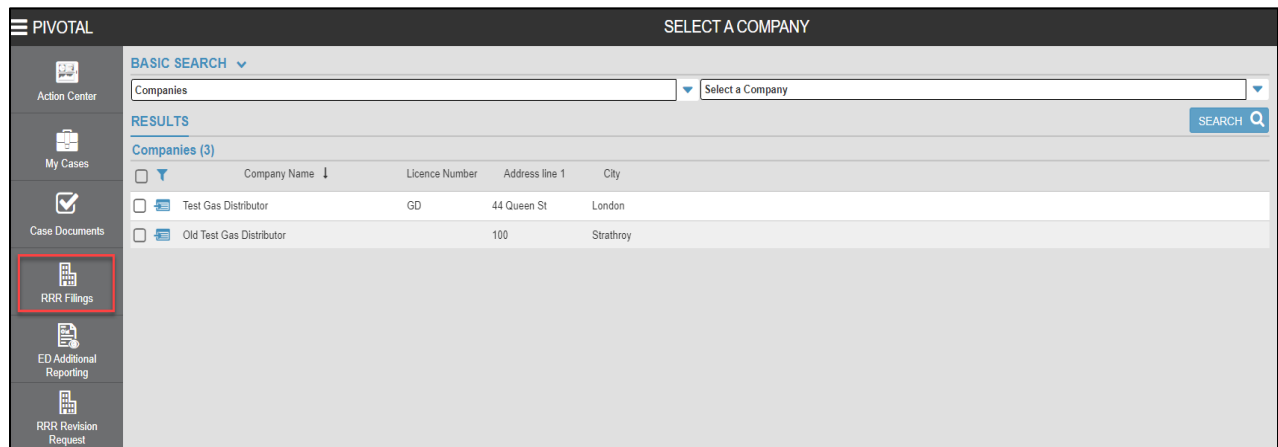
5.2. Access RRR Forms

The examples below cite quarterly and annual gas distributor filings G2.1.1 (NPV and Profitability Index) and G2.1.7 (Trial Balance) respectively due by April 30 .

Please follow the steps given below to access any of the annual or quarterly filings.

Step 1: Click on "Choose Gas Reporting Year" as shown in Figure 4 to select reporting year.

Step 2: Select RRR reporting schedule as briefed in section 4.2.

Step 3: Select the desired filing type (annual or quarterly) from the RRR navigation bar (refer Section #2). Depending on the filing type selected, the corresponding RRR forms would then appear on the RRR Forms Screen as shown in Figure 8.

In Pivotal UX the RRR navigation options are shown vertically. The Annual Gas Distributor Filing Forms are grouped in two tabs: G2.1.7 – G2.1.10 and G2.1.11 – G2.1.19.

Figure 8: Annual and Quarterly Filings

Step 4a: Click the enter form icon (🖃) under G2.1.7 form title to access the form. The RRR navigation bar shows all accounts grouped in three tabs 100 – 179, 180 – 290, 300 – 339 as well as Schedule 1 and Trial Balance Summary as shown in Figure 9. Or,

Figure 9: Sample Annual RRR Form

Step 4b: Click on enter form icon (🖅) under G2.1.1 form title to access the form. The RRR navigation bar shows all the entry forms in three different tabs – Table A: Summary Info, Table B: NPV Negative Performance and Table C: PI Below 0.8 as shown in Figure 10.
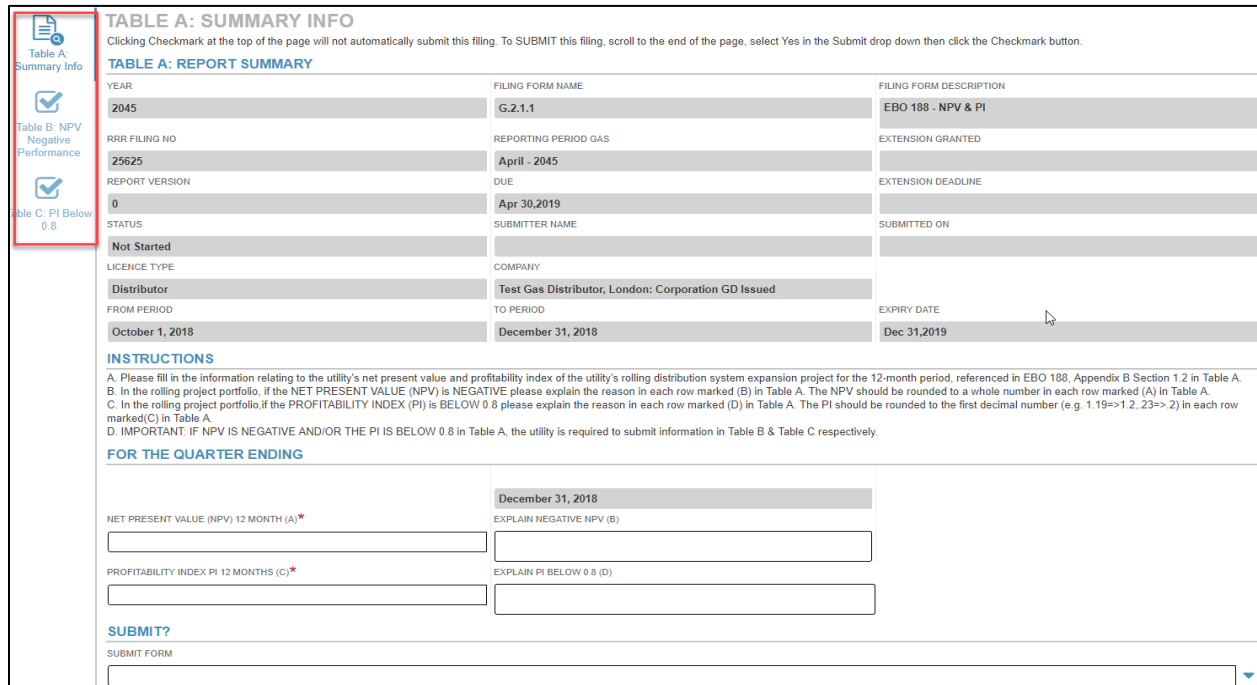
Figure 10: Sample Quarterly RRR Form

Step 5: Click on the desired tab from the RRR navigation bar to access the RRR reporting form template and enter the data.

5.3. Submit and View RRR Filings

The following topic describes the process and features of Pivotal UX for entering, saving and submitting RRR forms.

Step1: Access the desired form as per the instructions in the previous topic. In this example, G2.1.9 Service Quality Requirement (SQR) is selected. The status shows "not started" as shown in Figure 11.

Figure 11: View RRR Filing Status

Step 2: As an example, the Figure 12 shows the following features available at the time of entering RRR data.

- Sorting entries by month or based on the data entered in any of the columns in the table.
  - Sorting based on data – Click on the column header to select ascending or descending
  - Sorting based on month – Click on the sort and select ascending to view the table in monthly order.
- Totals in the "Total" row is an auto calculated field.
- All the horizontally calculated (read-only) fields will perform the calculation once the user clicks the "checkmark" button located at the top right hand of the screen.
- Pivotal UX differentiates between read-only and editable fields. Look for cells or column headers highlighted in grey which denotes a read-only field.

- The red flags on the editable fields denotes an unsaved data entry which will disappear once the user clicks the "checkmark" button.

Figure 12: Enter RRR Data

Step 3: When saving an incomplete form, Pivotal UX requires, at a minimum, completion of all mandatory fields (red *). Saving an incomplete form will result in a pop-up error message "Unable to save the form data. Provide a value for all required fields" as shown in Figure 13. Exiting an unsaved form will loose any entered data and the user has to start again.

Figure 13: Mandatory Field Error Message

Step 4: Once all the mandatory fields are completed, the user can save the form as a work-in-progress status. This will also enable the auto-calculations and any red flags within the specified cells will disappear as shown in Figure 14.

Figure 14: Save Form

MONTH	NUMBER OF CALLS REACHING A DISTRIBUTOR'S GENERAL INQUIRY NUMBER ANSWERED WITHIN 30 SECONDS (1)	NUMBER OF CALLS RECEIVED BY A DISTRIBUTOR'S GENERAL INQUIRY NUMBER (2)	CALL ANSWERING SERVICE LEVEL (%) (3=1/2*100)
April			0.00
May			0.00
June			0.00
July			0.00
August			0.00
September			0.00
October			0.00
November	55	12	458.33
December	100	67	149.25
Total	155	79	196.20

Red flags disappeared

Calculated fields

Step 5: Only for G2.1.9, Pivotal UX has embedded data validation checks. If a user attempts to submit a form with data validation errors or missing entries, Pivotal UX will display pop-up indicating the issue(s) that needs to resolved. See Figure 15.

Figure 15: Validation Rules
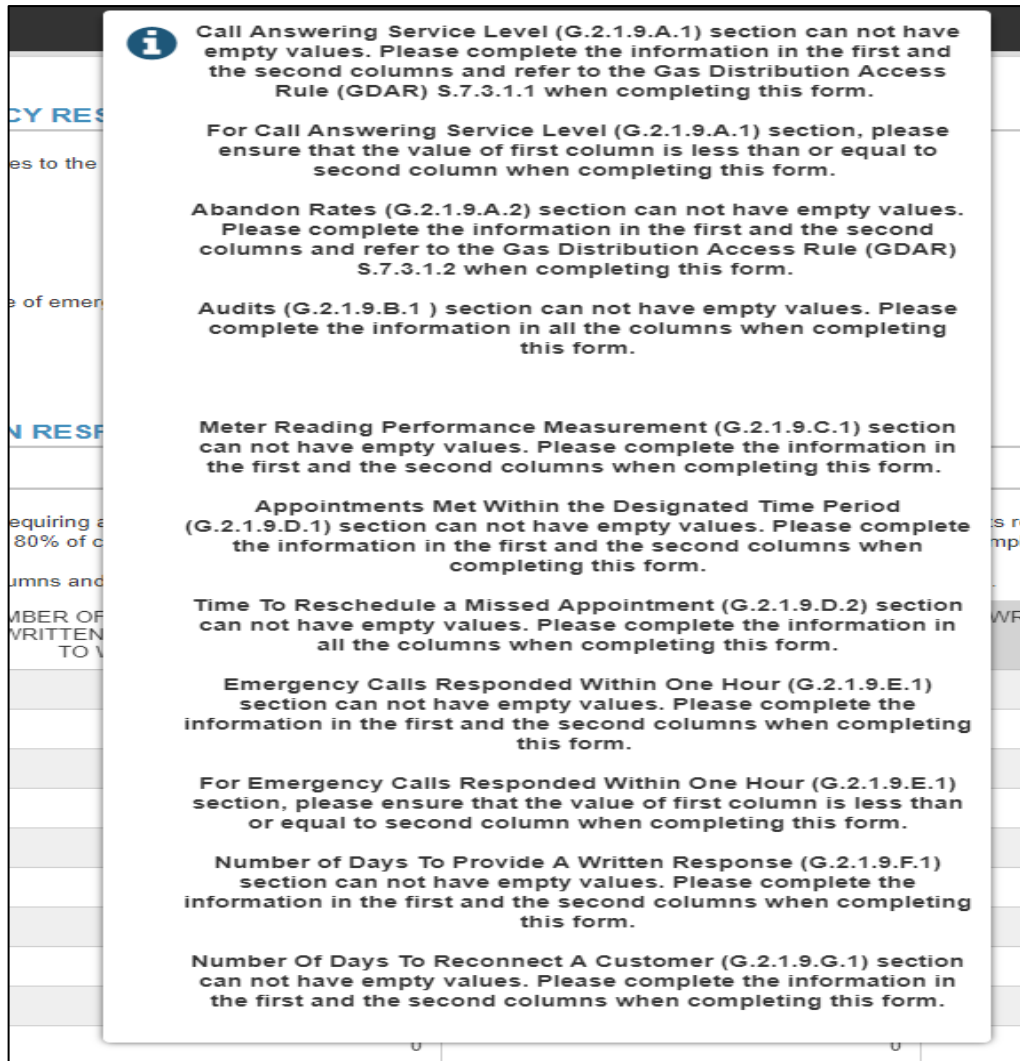
Step 6: Select "Yes" in the dropdown menu for submit form and then click checkmark to submit the form. See Figure 16.

Figure 16: Submit RRR Form
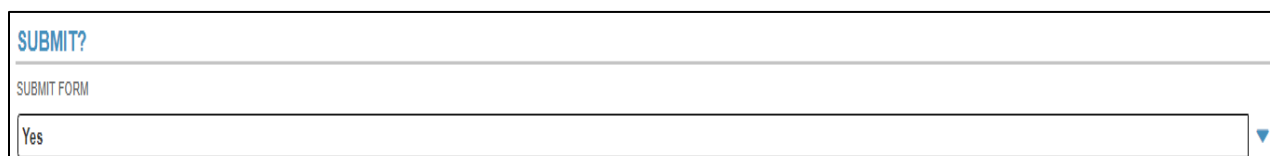
5.4. Export Data or Reports and Print

The following topic outlines key steps to export RRR data or reports from a submitted form and take prints if needed.

5.4.1. Export data

Please follow the steps given below to export data in MS excel using the export feature.

Step 1: Open the desired RRR form and bring the desired table from where the data is to be exported.

Step 2: Move the pointer over the selection box located on the header of the first column of the table, and click on it to select all the row entries (Note: you can make a custom selection by individually selecting or deselecting the rows from the first column). See Figure 17.

Figure 17: Selection Box

Step 3: Once the desired data are selected, right-click anywhere inside the highlighted table to open a right-click menu with options such as "export selection", "export all", etc. See Figure 18.

Figure 18: Export Selection

Step 4: Click the desired option (export selection in this example). Enter a preferred filename and also use the drop-down to select a file type such as .xls, .csv or .xml. See Figure 19.

Figure 19: Export File
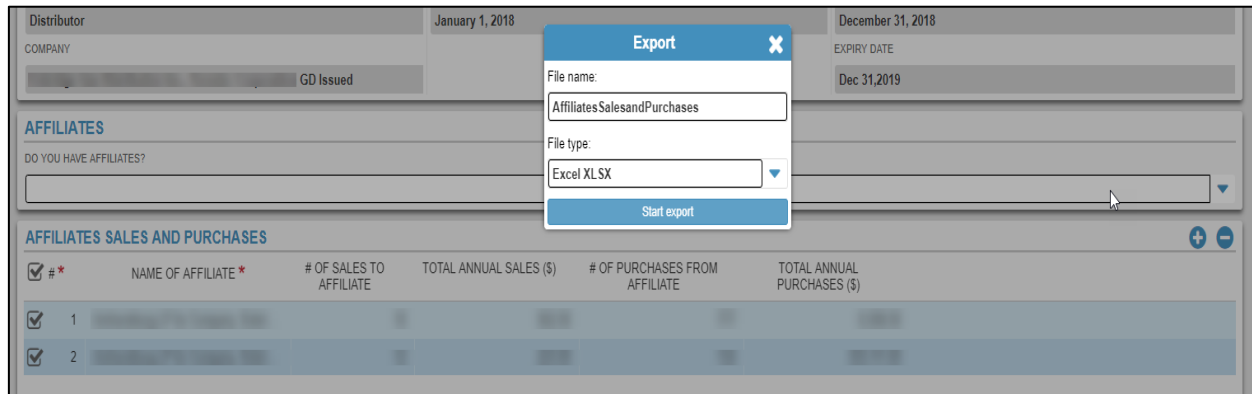
Step 5: Notice a special icon ( ) visible on the top right of the screen. This is the location where all export data queries are saved for further download. Click on the icon to view and download the exported files externally. Pivotal UX does not keep a cache of exported files, hence the exported files are only available in the particular session. See Figure 20.

Figure 20: Export File Download
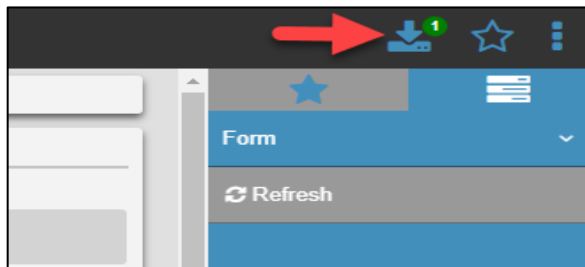
Step 6: A window with all export file requests will open on the screen. Move the pointer over the download icon (on the right hand side) and click to start the download. The data is now exported in the desired format on the user's computer. See Figure 21.

Figure 21: Export File Lookup
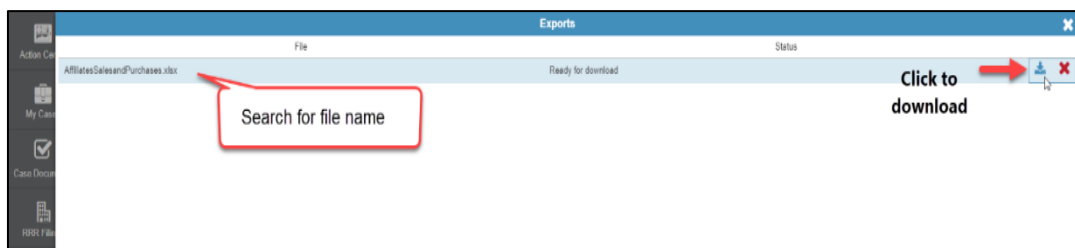
5.4.2. Export report

Pivotal UX "Print All" button allows the users to save a file on to their computers or take a physical print of the desired RRR form. To export a report, please follow the steps given below.

Step 1: Click open the desired RRR form using the UX navigation bar

Step 2: Click on the "Print All" button located on the menu bar. See Figure 22.

Figure 22: Print Report
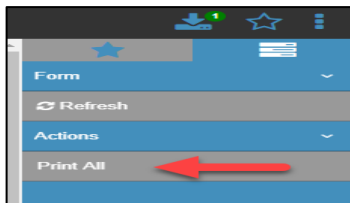
Step 3: Through the "Print All" button, the user can generate a report for the selected form. User may choose to either take a physical print by clicking on the print icon or export the report by clicking on "export this report" icon. See Figure 23.

Figure 23: Export Report Option
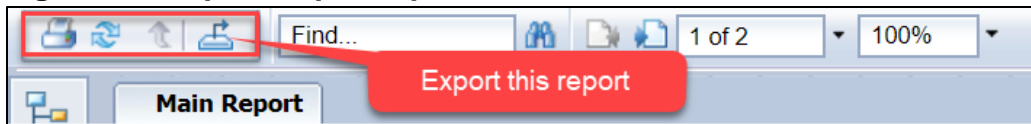
Step 4: For exporting a report, click on "export this report" icon. This will open a window with a dropdown selection for the desired file format and custom page range. Pivotal UX has the following file formats PDF, RPT, RTF, XML, CSV and MS Word version. See Figure 24.

Figure 24: Export Report Formats

5.4.3. Print report

Pivotal UX print all button allows the users to take a physical print of the desired RRR form. To print a report, please follow the steps given below.

Step 1: Click open the desired RRR form using the UX navigation bar

Step 2: Click on the "Print All" button located on the menu bar. See Figure 25.

Figure 25: Print Report
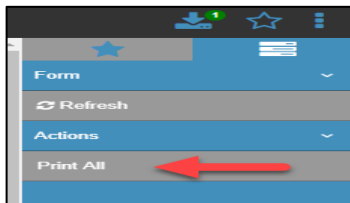
Step 3: Through the "Print All" button, the user may choose to take a physical print by clicking on the print icon. See Figure 26.

Figure 26: Print Report Option
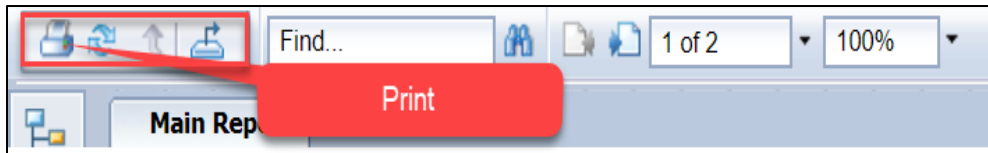
6.   RRR Revision Request

The following topic provides instructions on submitting and viewing RRR Revision Request.

6.1. Submit RRR Revision Request

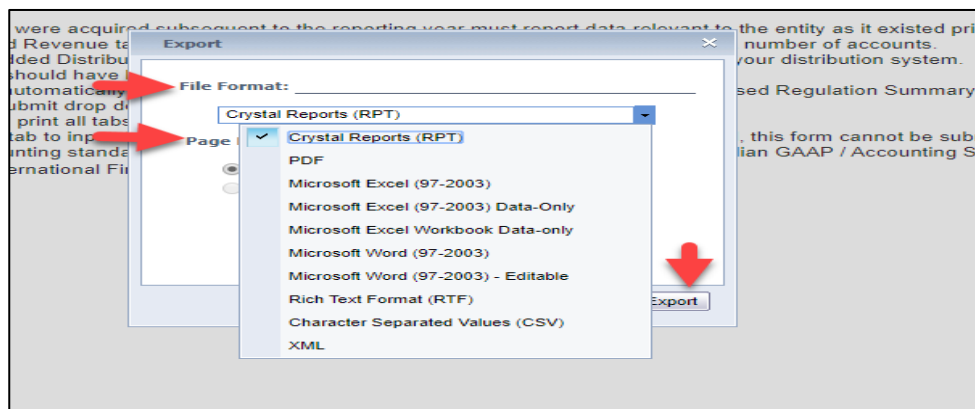Please follow the steps given below to submit RRR Revision Request.

Step 1: Login to Pivotal UX.

Step 2: Click on RRR Revision Request selection on the Navigation Bar (refer #1). This will open two tabs "Submit RRR Revision Request" and "RRR Revision Request Status". See Figure 27.

Figure 27: RRR Revision Request
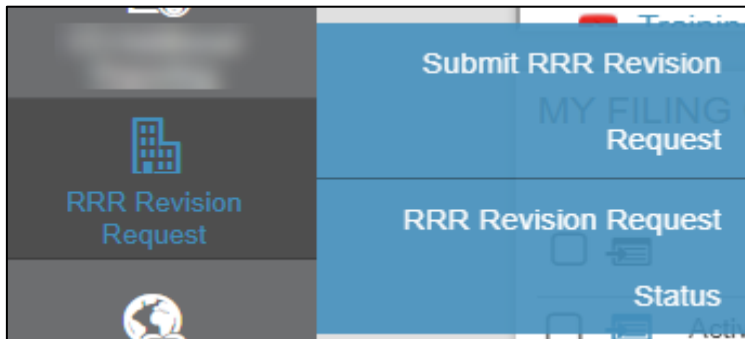
Step 3: Selecting "Submit RRR Revision Request" will open a blank form. User will have to ensure that all the mandatory fields marked in red asterisk (*) are filled in order to save the work in progress form.

Step 4: Select reporting entity name. Once all the required fields are entered, save the form first by clicking on the checkmark (√) on the top right of the screen. See Figure 28.

Figure 28: Enter Data in RRR Revision Request

Step 5: Only after the form is saved the user should proceed with uploading an attachment by clicking on the add attachment sign (+). See Figure 29.

Figure 29: Add RRR Revision Request Attachment

Step 6: Clicking on the add attachment will open another window where the user can select and upload a file as attachment. Click checkmark to save your attachment. A prompt stating "Attachment Saved" will appear at the top-screen. See Figure 30.

Figure 30: Upload RRR Revision Request Attachment
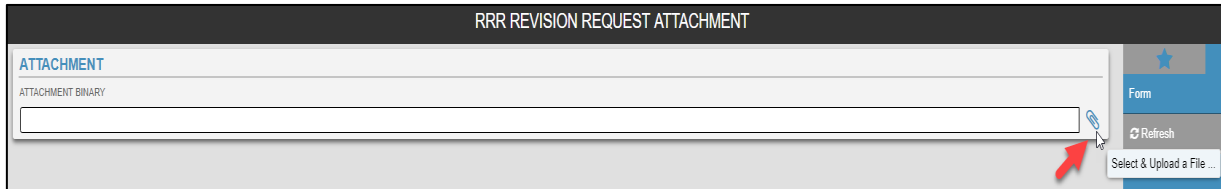
Step 7: To submit the revision request select Yes from the dropdown under the Submit table. Click checkmark to save and submit your revision request. See Figure 31.

Figure 31: Submit RRR Revision Request
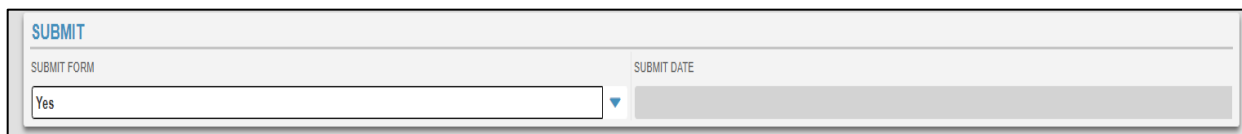
6.2. RRR Revision Request Status

Begin with **Step 2** from section 6.1 and then click on "RRR Revision Request Status" to view the status of all submissions. See Figure 32.

Figure 32: RRR Revision Request Status

The status categories are listed below:

- New: RRR Revision Request that is saved but not submitted to OEB.
- Submitted: RRR Revision Request that is submitted to OEB.
- Approved: Submitted RRR Revision Request that has been approved by OEB.
- Not Approved: Submitted RRR Revision Request not approved by OEB.
- Completed: Approved RRR Revision Request marked as completed by OEB.

7. Frequently Asked Questions (FAQs)

1. Can I use my existing e-Filing Services login credentials to enter Pivotal UX?

Yes, the login and password remain valid. Pivotal UX, allows the users to also change the password at their end. For further instructions, please follow section 2 of the guide.

2. Will the e-Filing Services portal cease to exist once the Pivotal UX goes live?

Yes. The e-Filing Services will be deactivated once Pivotal UX goes live.

3. I want to view my previous RRR filing submissions. Will Pivotal UX be able to show me all my earlier filings?

Yes. All RRR filings from previous years have moved to Pivotal UX and accessible by registered users. Please contact IT.help@oeb.ca for assistance if you have any difficulties accessing your historic data.

4. I want to submit a data revision for a form that I submitted in e-Filing Services. Can I submit a Data Revision Request for a filing that was done on e-filing services?

Yes. All previously reported data is carried over to Pivotal UX.

5. Will the Pivotal UX auto save my work-in-progress?

No, but the forms can be saved manually. Once an incomplete form is saved, the status will be shown as work-in-progress. For further instructions, please follow section 5.3 step 4 of the guide.

6. Why am I unable to save a work-in-progress form?

Before saving a work-in-progress form please ensure that all the mandatory fields marked with red asterisk (*) are filled. Once all the mandatory fields are entered click on the "checkmark" sign (√) to save your work-in-progress form as explained in FAQ #5.

7. **While entering data I see a red mark on the data entry cells. Is this an error message?**

A red mark displayed on data entry cells indicate that the data is not yet saved. The red mark will disappear once the form is saved by clicking the "checkmark" sign (√).

8. **How do I distinguish between a read only and writeable cell in Pivotal UX?**
A read only cell (either fixed or auto-calculated field) has a grey background colour, whereas, an editable cell has a white background colour. Within a table, a calculated cell has the column header in a grey background colour.

9. **How do I view the auto-calculated fields once I enter data in the editable fields?**

To view these fields, you will need to save the work-in-progress in your form to allow the system to run background calculations in order to display results in the auto-calculated fields.

10. **How do the auto-calculated fields show the calculated output once the data is entered?**

To view these fields, you will need to save the work-in-progress in your form to allow the system to run background calculations in order to display results in the auto-calculated fields.

11. **I want to export saved data externally. Is there a way I can copy the entered data?**

In Pivotal UX, the saved data can be exported in multiple user friendly formats. For further instructions, please follow section 5.4.1 of the guide.

12. **I want to print a form. What should I do?**

Use the "Print All" function located within the menu section of Pivotal UX for printing forms. For further instructions, please follow section 5.4.3 of the guide.

13. **After clicking export the following message appears on the screen, "Your export <filing title.xlsx> is ready for download". I want to know, where the exported file gets saved once it is exported.**

Once the start export is clicked, the selected data is then saved in the exports tab located on the top right side of the window. Click on the exports tab to view the current and any previously exported selections for download in the desired format. For further instructions, please follow section 5.4 of the guide.

14. **Have general IT related questions?**

For any general IT related questions, please get in touch with OEB's IT Help at IT.help@oeb.ca

8.   Contacts

Issue Type	Contact	Email
Technical Support	IT help	IT.help@oeb.ca
RRR Filings or RRR Revision Request	Performance Analytics & Reporting	performance_reporting@oeb.ca

9. Legend

	Action Center		Mandatory field
	Add attachment		Menu Option (Show/Hide)
	Add/Remove row		Navigation Option (Show/Hide)
	Back button		Print
	Enter form (single click)		Save data (checkmark) and Cancel data
	Export data		Selection (export data/order rows)
	Export this report		Logout
	Favourite (Add/Remove)		Unsaved data entry