



PETRINEX
CANADA'S PETROLEUM INFORMATION NETWORK

Manitoba Petrinex Inclusion Change Leader Meeting #2

March 18, 2020



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Agenda

1. Welcome & Introductions
2. Project Overview & Timeline
3. Interoperability Testing Update
4. Training Update
5. Manitoba Government Topics
6. Industry Data Conversion & Readiness Update
7. Creating Security Roles & Users (Primary USA)
8. Troubleshooting Tips
9. Important Dates
10. Steps to Readiness Review
11. Questions

Project Attendees

Manitoba Attendees:

Peter Mraz: Director of Regulatory Services
 Ministry of Agriculture & Resource Development
 Petroleum Branch

Petrinex Attendees:

Ross Weaver: Manager, Petrinex Industry Team

Steve Freeman: Industry Coordinator – MB Lead

ARD Petroleum Branch Opening Comments

- Thank you for all coming today and to Petrinex for hosting
- A tremendous amount of work has gone on in government (here in Alberta and Manitoba) to make this happen
- We would like to acknowledge and thank the contribution of industry
- Your participation and support are critical to the success of the implementation of Petrinex

Agenda

2. Project Overview & Timeline

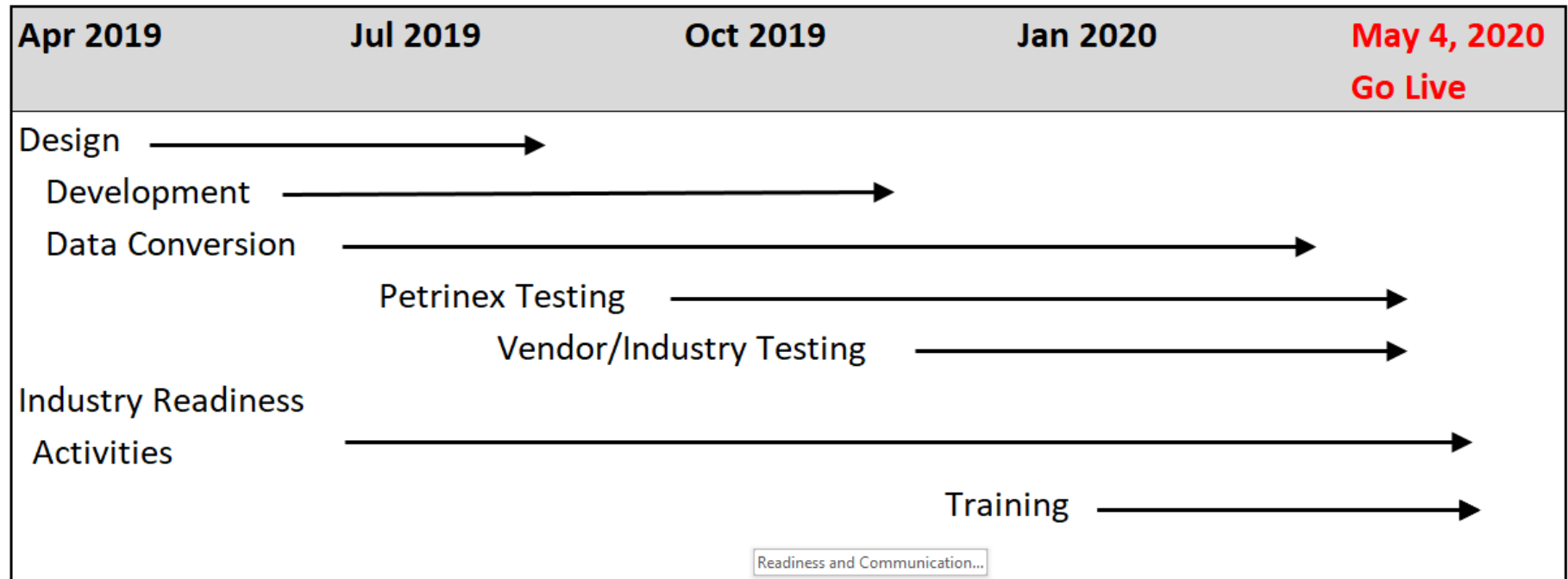
Project Overview

- Design phase was completed in July 2019 and was based primarily on adopting SK functionality with minimal changes.
- Development was completed in November 2019.
- Last data conversion refresh before Go-Live was completed in mid-February.
 - A few issues continue to be handled. Most issues have been resolved throughout this process.
 - Infrastructure reports were sent to Change Leaders on Feb 12.
- Acceptance testing is in progress.
- End to end testing between Petrinex and newly developed ARD software is in progress.

Readiness and Communications Activities

- Industry company SME identification and recruitment for design workshops
- Petrinex Industry Team Project Notification
- Stakeholder and Change Leader identification and contact info for “Scorecard”
- Petrinex website changes (including MB “Initiatives Page”)
- Joint or independent non-producer meetings (e.g. vendors, TM/PL operators)
- Industry Readiness Handbook
- Change Leader Meetings
- Vendor specification release
- Industry Team annual billing
- **Vendor Interoperability and Industry Interoperability Testing**
- **Acceptance Testing (in final stages)**
- **End to End Testing**
- **Industry infrastructure data collection/prep activities (Business Associate, Facilities, Well-Facility Linkages)**
- **Scorecard tracking and follow-up (emails, call-out program)**
- **Learning Modules & Other Training Options.**
- **Updates to CAPP Accounting Committee, EPAC, EPGs, CAPPA etc.**

Project Overview



HAPPY STAR WARS DAY!



Project Overview

- Petrinex Go-Live is **May 4, 2020**.
 - Companies will have received Petrinex login information (i.e. passwords) for Primary/Backup USAs. Companies can begin creating users and security roles.
 - Monthly Reporting (Volumetrics, Pipeline Splits, Oil Valuation, etc.) will begin for the April production month.
 - More details on post Go-Live activities are covered further on.
- Royalty Tax Attributes (RTA) and Royalty Tax Payer (RTP) functionality will NOT be available for Go-Live.
 - There have been difficulties in collecting and integrating the various data points needed for RTA as they are currently in multiple locations and formats.
- RTA and RTP WILL be implemented at a future date.
 - Development of the functionality is complete and ready for when the data is available.

Royalty Tax Attributes Review

- Royalty tax information is maintained by ARD in their own systems.
- Some information will be made available in Petrinex for query (read only) purposes.
 - RTA information is provided for wells and units, each having their own set of attributes.
 - Examples – oil/gas classification, holiday program info, unit participation, spacing unit info, unit tract info, TTEF & PMPI info
- Petrinex derives Unit IDs through RTA information.
 - Implication is that a Unit ID couldn't be used in Pipeline Splits/Oil Valuation reporting for delivered volumes associated with a unit.
 - Working on a solution.

Royalty Tax Payer Review

- Royalty tax payer information is required for each active stream (well, unit) and applicable product (oil/gas). The information collected for each entity includes:
 - Tract Number & Tract Factor (for units only)
 - Royalty Tax Payer BA ID
 - Ownership Type (Crown, Freehold, etc.)
 - RTP Percent
- Petrinex requires that RTA information exist to verify whether RTP submissions are required.
 - There is a monthly “Missing/Incomplete” process that runs in Petrinex to identify active streams that don’t have RTP information, but have RTA information.

Royalty Tax Payer

- Operator of stream in Petrinex is responsible for submitting/updating RTP information.
 - For new wells and conversion, the Licensee is considered to be the stream operator.
- Operatorship changes are done the same way as facility operator changes.
- When turned on, it is expected that the operator of the stream will be the royalty payer 100%.
 - This is in accordance with current Manitoba reporting.
 - Can accommodate TIK partners if/when required.
- There is no impact to Industry by not having this at Go-Live as this submission is not required until RTA information exists.

Enhanced Valuation Audit Program (EVAP)

- EVAP functionality is NOT scheduled to be turned on until 2021.
- EVAP is an extension of the oil valuation process for non-arm's length oil sales.
 - No oil valuation purchaser reporting required for non-arm's length sales.
 - Diminished value in comparing prices. Both sides could report a price that does not fit the rules for establishing a fair market value.
 - A sale is considered to be non-arm's length in Petrinex if the owner and purchaser BA ID in a pipeline splits submission are the same or are considered to be related.
 - Functionality exists in Petrinex for producing BAs to list any related purchasers.

Enhanced Valuation Audit Program (EVAP)

- EVAP declarations provide executive sign-off attesting that the company is following valuation rules for establishing a fair market value.
- Declarations consist of:
 - An official declaration containing a number of statements/conditions (as determined by Ministry) with at least one senior executive signature.
 - Sample calculations.
 - An analysis of the company's controls that are in place to ensure accurate pricing. Controls are evaluated and any deficiencies that could pose a risk are identified.
- It is anticipated that the first EVAP declaration deadline will be in February 2022 (for the 2021 production year).

3. Interoperability Testing Update

Interoperability Testing Update

- Interoperability Testing provides both software vendors and operators a chance to submit batch files to the Petrinex Industry Team.
 - Files generated by PA Software systems (XML or CSV).
 - Manually created spreadsheets for uploading data to Petrinex (CSV).
- The Industry Team will run the submitted batch files in the test environment and provide feedback to the test submitter.
- Industry will not be engaged in testing online functionality.
- Vendors and operators will assess how much testing is appropriate.
 - Not every company will choose to engage in interoperability testing.
 - All upload processes should be covered through various participants' test submissions.

Interoperability Testing Update

- Can test ALL kinds of monthly submission files **NOW**.
 - Volumetrics, Waste Plant, Oil Pipeline Splits, Oil Valuation (Royalty Tax Payer & Purchaser), Allocations.
 - Will accept files from both software vendors and Industry if ready.
- Change Leaders and software vendors were notified on December 12.
- Changing submission month to be **2019-12**.
- Updated testing instructions are available on the Petrinex Website (Under Initiatives – Manitoba Inclusion Initiative Page) in the following two locations:
 - PMIP Industry Readiness Handbook (Appendix 12)
 - Job Aids: - Instructions for MB Inclusion Project IIO Testing and Transmittal Form.

<https://www.petrinex.ca/Initiatives/Pages/Manitoba.aspx>
- Tests can be processed right up until Go-Live.

Agenda

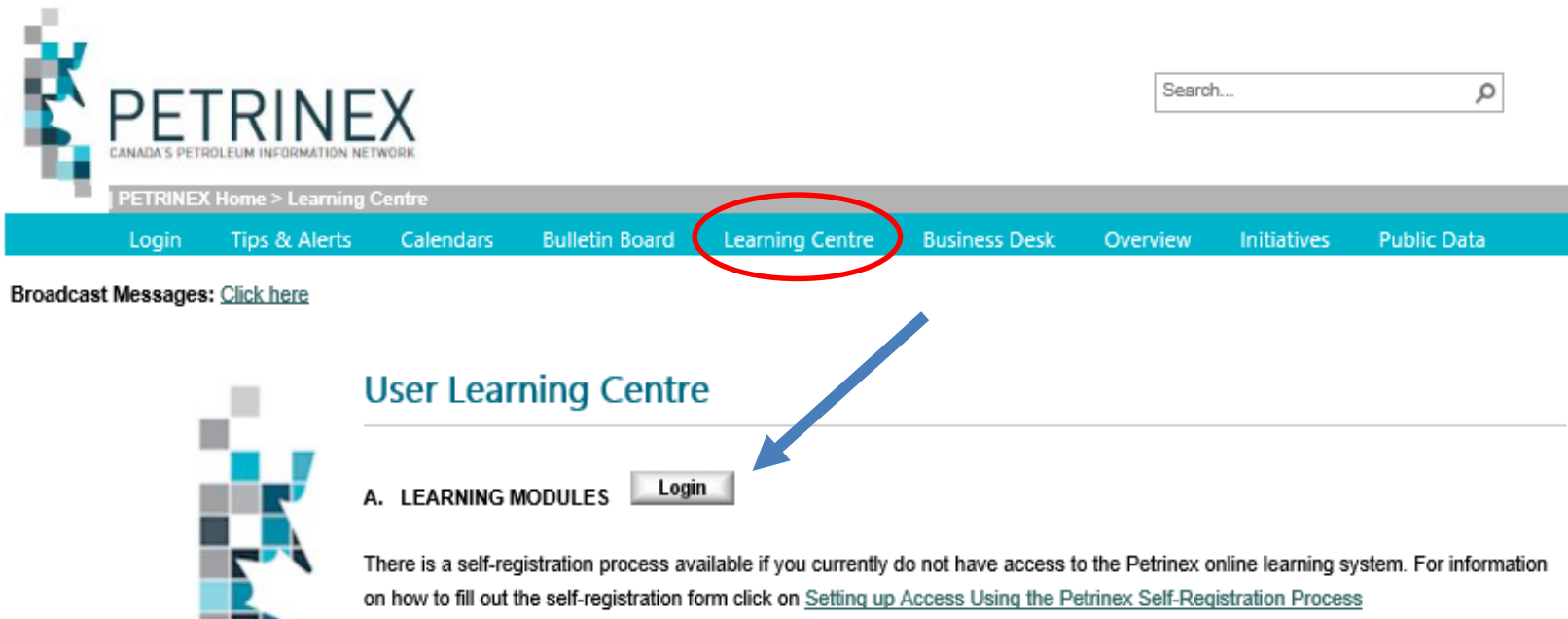
4. Training Update

Training Update

- Goal is to be ready for Go-Live (or as close as possible).
 - MB content has been added to the knowledge portions of the 40 MB related modules.
 - The training team is currently working on creating the Step by Step and Exercise portions for release as they are developed.
 - For a complete listing of the modules that have been completed see the link available on the Resource Centre web page under the Learning Modules log in button.
 - Learning modules for Royalty/Tax Payer (RTP) and Royalty Tax Attributes (RTA) will be released when this functionality is available. Further information to follow.

Access to Petrinex Online Learning Site

- From the Petrinex Home Page click on Learning Centre, and click on the “Login” button.



The screenshot displays the Petrinex website interface. At the top left is the Petrinex logo with the text "CANADA'S PETROLEUM INFORMATION NETWORK". To the right is a search bar labeled "Search...". Below the logo is a breadcrumb trail: "PETRINEX Home > Learning Centre". A horizontal navigation bar contains several links: "Login", "Tips & Alerts", "Calendars", "Bulletin Board", "Learning Centre" (which is circled in red), "Business Desk", "Overview", "Initiatives", and "Public Data". Below the navigation bar, there is a section for "Broadcast Messages" with a link "Click here". The main content area is titled "User Learning Centre". Under this title, there is a section "A. LEARNING MODULES" followed by a "Login" button. A blue arrow points from the "Login" button in the navigation bar to the "Login" button in the "User Learning Centre" section. Below the "Login" button, there is a paragraph of text: "There is a self-registration process available if you currently do not have access to the Petrinex online learning system. For information on how to fill out the self-registration form click on [Setting up Access Using the Petrinex Self-Registration Process](#)".

Access to Petrinex Online Learning Site

- Choose the appropriate login process.

Welcome - Please Log In

Already a Member?	Not a Member Yet?
<p>Login Name <input style="width: 100%;" type="text"/></p> <p>Password <input style="width: 100%;" type="password"/></p> <p style="text-align: center;"><input type="button" value="Login"/></p> <p><input type="checkbox"/> Keep me logged in</p> <p>Forgot your login name?</p> <p>Forgot your password?</p>	<p>If you do not have a login name and password, please register.</p> <p>Members have access to special features:</p> <ul style="list-style-type: none">• Post messages to discussion forums• Send a question to subject matter experts• Manage your subscriptions and social network <p style="text-align: center;"><input type="button" value="Register Now"/></p>

Read Me

If you have an account enter your username and password. You will be prompted to change your password and answer security questions. Enter the answers carefully. These will be used to help you reset your password in the future should you forget your password.



[Contact Us](#)

Access to Petrinex Online Learning Site

Already a Member?

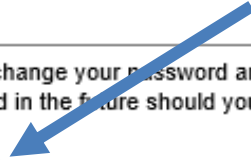
- If you currently have access to the online learning centre please do not create a new user ID.
 - If you cannot remember your password or user ID, please click on the “Contact Us” button and someone will get back to you by email with the required information.

Read Me

If you have an account enter your username and password. You will be prompted to change your password and answer security questions. Enter the answers carefully. These will be used to help you reset your password in the future should you forget your password.



Contact Us




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[Contact Us](#)

Access to Petrinex Online Learning Site

Registration

Please enter the following information to register.

* = required field

* First name:

* Last name:

* Login name:

Passwords should be at least 4 characters long and not contain any spaces.

* Password:

* Confirm Password:

* Phone:

Extension:

* Email:

* Primary Organization:

Choices are: Industry, Ministry, CAPP, COLC Training

* BA Code:

Primary Organizations - Ministry and CAPP enter N/A

* Company Name:

If your Co. Name is not listed, use 0-NA and contact us to have it added.

* Ministry:

If access is required as Government employee

* CAPP Certification Level:

CAPP Certification Level you are currently enrolled in

* Country:

Read Me

If you have an account enter your username and password. You will be prompted to change your password and answer security questions. Enter the answers carefully. These will be used to help you reset your password in the future should you forget your password.



[Contact Us](#)


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To access the training you are interested in follow the following steps:

Individual Courses:

Click the Search and Enroll button and then click "All Learning". This will display all of the courses available in the entire Petrinex training suite. You can select individual courses as required by clicking on the selection box to the left of the name.

Curriculum:

Click the Search and Enroll button and then click "Curricula". This will display the different available curricula broken down by:

- **Entire Petrinex Collection** - all training modules available in the Petrinex training suite.
- **CAPPA Collection** - all training modules required to be completed for Levels 1-5 for CAPPA certification.
- **Industry Collection** - all training modules available in the Petrinex training suite.
- **Ministry Collection** - all training modules available in the Petrinex training suite.
- **CAPPA Collection - Levels 1-2** - all training modules required to be completed in Levels 1 and 2 for CAPPA certification
- **CAPPA Collection - Level 3** - all training modules required to be completed for Level 3
- **CAPPA Collection - Level 4-5** - all training modules required to be completed in Levels 4 and 5

You will notice a "Purchase" button beside the applicable collections, however there is no fee applied to the Petrinex training modules. This button will just provide you access to the collection and modules.

If you have any questions, please contact us by clicking the "Contact Us" button on the top right hand side of your profile.

Student Learning

 [My Transcript](#)
 [Search & Enroll](#)

My Assignments

[Show All](#) | [Curricula](#) | [eLearning](#) | [To Do](#) | [Schedule](#)

Showing 1 to 6 of 6

- ☒ **Course**  COLC - Introduction to Crude Oil
 - ☒ **Curriculum**  _CAPPA Certification Curriculum
 - ☒ **Curriculum**  _Industry Curriculum
 - ☒ **Curriculum**  _Ministry Curriculum
- ☒ **Course**  Enrolling and Purchasing COLC Courses
 - ☒ **Curriculum**  BC Modules for review

Sort by ... 

Show content ...

... with title containing:

... currently:

... in Curriculum:

Access to Petrinex Online Learning Site

Curriculum Information

Industry Curriculum
Entire training module collections related to Petrinex functionality and processes.

Type: Standard
Approval Required: No

[Withdraw](#)

Date Started: 11/23/2015 10:09 AM
Progress: In progress
Last Accessed: 8/14/2018

Content Resources Additional Data

Title

- Course 1.01 Petrinex Overview
- Curriculum BA User Security (USA) Collection
- Curriculum Common Functions Collection
- Curriculum **Monthly Reporting Collection**
- Curriculum Infrastructure Collection
- Curriculum Annual Reporting Collection
- Curriculum Audit Reporting Collection

Information
[Open](#)

Curriculum Information

Monthly Reporting Collection
Type: Standard
Approval Required: No

[Withdraw](#)

Date Started: 11/29/2015 9:46 AM
Progress: In progress
Last Accessed: 7/20/2018

Content Resources Additional Data

Title

- Course 5.01 Manage Volumetric Submissions [Open](#)
- Course 5.02 Manage Volumetric Submissions for MS [Open](#)
- Course 5.03 Manage Volumetric Submissions for BT & IF [Open](#)
- Course 5.04 - Manage Volumetric Submissions for GP & GS [Open](#)
- Course 5.05 Manage Volumetric Submissions for TM [Open](#)
- Course 5.06 Query Volumetric Submissions [Open](#)
- Course 5.07 Manage Waste Plant Submissions [Open](#)

[Close](#)

5. Manitoba Government Topics

- Areas for Regulation Change:
 - Section 120 of the Drilling and Production Regulation requires industry to report through Petrinex

120 The licensee of a well that
(a) produces oil, gas or water; or
(b) is used for injection or disposal of water or
any other substance;
at any time during a month shall file a report with
the registrar, on a form obtained from the branch or
acceptable to the registrar, not later than the last
day of the following month.

- *** Reporting dates will align with Saskatchewan**

- Areas for Regulation Change cont.:

Section 75(1) - Application for a battery operating permit; sections (d) and (e) are as follows;

- (d) a list of the wells to be tied in to the battery;
- (e) an estimate of the production rates of oil, water and gas for the battery, including the estimated volume of gas
 - (i) used for fuel,
 - (ii) flared, or
 - (iii) vented
 - (iiii) sold
- The difference is that you will now have to include how much is sold(if any). This will be consistent with Saskatchewan reporting.

- Areas for Regulation Change cont.:
 - Reporting of Gas production will change.
 - 106(2) Where required by the director, the operator shall measure produced gas with a gas meter and shall keep a record of the data required to accurately calculate the volume of gas produced.

- Areas for Regulation Change cont.:
 - Operators will be required to report how much gas production (as detailed in their battery operating permit application) was;
 - (i) used for fuel,
 - (ii) flared, or
 - (iii) vented
 - (iiii) sold

- Areas for Regulation Change cont.:
 - This existing section of the regulation give the Petroleum Branch the necessary authority to make some detailed metering changes if required.
 - Measurement of production 109 The licensee shall measure any production in a manner that is satisfactory to the director and, where a meter is used, the licensee shall
 - (a) install the meter in accordance with the manufacturer's specifications;
 - (b) maintain the meter in good operating condition; and
 - (c) protect the meter from weather and tampering.

- Areas for Regulation Change cont.:
 - EVAP will not be active initially in Petrinex for Manitoba operators
 - Further regulatory changes will be required before operators will enter this information
 - RTA/RTP
 - Further regulatory changes will be required before operators will enter this information

- Regulatory Compliance and Enforcement
 - The Petroleum Branch recognizes that in the first 2 month of use there will be errors and omissions.
 - No enforcement or compliance action will be taken for those operators that are committed and working with Petrinex.
 - For those operators that are NOT using Petrinex the PB will be issuing SD orders on all wells and facilities at the end of the 1st month of use.

6. Industry Data Conversion & Readiness Update

Industry Conversion & Readiness Plan

3 Major Components of the Plan

1. Information Collected From Industry

- BA Data Collection Form/USA Authorization Letter
- All Facility IDs & Well-Facility Linkages (if applicable)
- Oil Purchasers
- Commingled Well Licenses **(NEW)**
 - Oil producing wells with 2 or more events producing in different formations.

2. Conversion Information Shared With Industry

- Business Associate
- Well Status
- Facility
- Facility Rejections & Well-Facility Link Failures

3. Activities at Go-Live

- Primary USA sets up users/roles
- Opening Inventories
- Infrastructure Updates
- Related BAs for Oil Valuation purposes

1. Information Collected From Industry

Business Associate

- Originally, Change Leaders were only asked to provide Primary/Backup USA information.
- Change Leaders are now asked to provide **ALL** BA information required for set up in Petrinex.
- An email was sent to Change Leaders on December 18 which included:
 - The new BA Data Collection Form
 - The USA Authorization Letter template.
- Refer to Appendix 11 of the PMIP Handbook for more information.

1. Information Collected From Industry

- The BA Data Collection Form has 3 sections:
 - General BA Information (address, corporate contact info)
 - Primary/Backup USA (name, contact info)
 - BA Roles (check all that apply – operator, licensee, admin only, etc.)
- The USA Authorization Letter template must be transferred to corporate letterhead, signed by an appropriate official, scanned and returned along with the BA Data Collection Form.
- Both the form and the authorization letter must be returned even if USA information was provided previously.
- Form/Letter must be completed and returned no later than **March 20** in order to have Petrinex access at Go-Live.
 - Return to Sheryl Moody sheryl.moody@gov.ab.ca. Please send Sheryl an email if you have any questions.

1. Information Collected From Industry

Facility Information

- We have been receiving and adding Industry facility and well-linkage submissions over the past several months.
 - Have created over 1000 facilities and over 6700 well linkages.
- Some of the major issues we have encountered in data conversion have been:
 - Wells that had a status of WATER ACTIVE INJ N/A couldn't be linked to 501 subtype injection facilities (EOR/Water Flood).
 - Wells with a status of Minsuspend were not being handled in the conversion process.
 - ARD sends wells with an active status in which we have no facility to link to or the well status does not match the facility type we currently have the well linked to.
 - Industry provides a well linkage, but well is not included or was rejected in the ARD file.
 - Commingling multi-well BT facility licenses.
 - Handling of salt wells.

1. Information Collected From Industry

Issues Resolved

- ARD has agreed that wells with WATER ACTIVE INJ N/A statuses should be allowed with an EOR/Water Flood injection facility. Necessary transitions were added to Petrinex code tables.
- A fix was implemented to handle wells with a Minsuspend status. These wells should link successfully to either active or suspended facilities.

1. Information Collected From Industry

Issues Ongoing

- Facilities were created for any active wells received from ARD in which we did not have any facility linkages from Industry.
 - Created single-well BTs and injection facilities for companies that have not responded to our request for infrastructure.
 - Created “conversion” facilities for companies that have responded, but we have some outstanding wells from ARD.
 - **Please review your infrastructure in the most recent set of conversion refresh reports.**

1. Information Collected From Industry

- Have engaged Industry in instances where well linkages fail because the well status provided by ARD does not match the type of facility the well is linked to.
 - Example: Well is linked to a BT, but ARD sends a water injection status.
 - Sometimes this can be due to timing differences. In the past ARD data was a few months older than current. Data is supposed to be much more current in this conversion run.
 - Will continue to deal with these as they come up. This requires communication between Industry and ARD to ensure these are correct.
- Have engaged Industry in instances where a well linkage is provided, but the well is not in ARD's conversion load.
 - Will continue to deal with these as they come up as well. Communication between Industry and ARD is necessary.

1. Information Collected From Industry

- ARD is working to resolve all issues where well statuses are rejected because they fail Petrinex validation edits.
 - Can be due to providing transition from one status to another, but that transition is not in our code table. ARD must provide another valid transition.
 - Several instances where GCI or Pool values are not correct. These values must be fixed in the ARD conversion file.
 - All will be resolved for Go-Live load.

1. Information Collected From Industry

Oil Purchasers

- Many producers have told us who their purchasers are. Most have a BA ID already.
- Purchasers who require a BA ID need to contact ARD to find out what is required to register their company in Manitoba.
- For Petrinex set up, new BAs must fill out the BA Data Collection Form and submit it along with their USA Authorization Letter (same as all other BAs).
- New BA IDs must be established by **March 20** in order to be included in Go-Live data conversion. After Go-Live, new companies will fill out the online application form on the Petrinex website.

1. Information Collected From Industry

Commingled Well Licenses (New Requirement)

- For scenarios where companies have a well with 2 or more oil producing events in different formations.
- Under this scenario, production volumes must be reported separately for each event.
- ARD solution is to create a facility licence that has the same number as the well licence.
 - Industry will then create a multi-well BT using that facility licence.
 - Each well event will be given an active producing status and linked to the new BT.
- ARD does not know which well licenses fall under this scenario. We have had to reach out to Industry to tell us if they have any applicable well licenses.

2. Conversion Information Shared with Industry

- A latest set of Industry Conversion Data reports was sent out on Feb 12.
- **Please review all of the reports:**
 - **Business Associate** – Ensure all assigned roles are correct.
 - **Well Infrastructure** – Ensure all of your wells are listed, have the correct statuses, and are linked to the correct facility IDs.
 - **Facility Infrastructure** – Ensure that all of your facilities are listed, have the correct IDs, and are associated with the right licences (if applicable). **Check to see if we had to create facility IDs for some of your active wells.**
 - **Facility Conversion Errors** – Review the list to see if any of your facilities are listed. Reasons are provided.
 - **Well-Facility Link Failures** – Review the list to see if any of your wells failed to link to your facilities. Reasons are provided.
- Changes and corrections can still be made up until **April 9** for Go-Live conversion.

3. Activities at Go-Live

Primary USA Creates Users/Roles

- User IDs must be created and assigned User Security Roles before any reporting can commence on Petrinex. More detailed instructions are provided in the next section.
- Use Security Roles define which functions a user can perform in Petrinex.
- At least one user must be created for each company. The Primary & Backup USA cannot perform reporting functions in Petrinex.
- The Primary and Backup USA will continue to manage user access and roles going forward.
- **USA passwords will be sent out just prior to Go-Live.**

3. Activities at Go-Live

Enter Opening Inventories in Volumetrics

- Opening inventories will not be collected prior to Go-Live as there is not much time between reporting the ending inventory for the prior month and getting that number converted into Petrinex ahead of time.
- Users will report opening inventories as Inventory Adjustments in Petrinex.
 - Inventory at Facility level will use activity INVADJ
 - Load Inventory at Well level will use activity LDINVADJ
- Closing inventories will be reported using normal Petrinex activities (INVCL or LDINVCL for load inventory).
- Opening inventories going forward will be auto-populated from the prior month's closing inventory.

3. Activities at Go-Live

Infrastructure Updates:

Wells & Facilities

- Make any required corrections using online infrastructure processes.
 - Well-Facility Linkage Changes
 - Editing Well Statuses
 - Requesting Operator Changes
 - Changing Facility Operational Status

Terminal

- Operators of terminals that are physically connected pipelines may **optionally** update pipeline link information in Facility Infrastructure.
 - Set the Physically Connected to a Pipeline flag to “Yes.”
 - Enter the associated Pipeline ID in Terminal-Pipeline Link.

3. Activities at Go-Live

Commingled Wells **(New Requirement)**

- For scenarios where companies have water injection/disposal wells with well events in multiple formations
 - Under this scenario, injection volumes are reported for all well events under one “reporting” event.
- ARD solution is to have Industry set the appropriate well statuses for these wells after Go-Live.
- ARD has already identified the wells for this scenario. Change Leaders will receive an email with a list of the wells they must commingle.
- Commingling step by step instructions are covered further on and are included in the PMIP Industry Readiness Handbook.

3. Activities at Go-Live

Enter Related Business Associates for Oil Valuation

- Oil that is delivered to a custody transfer point requires a pipeline splits submission where the volume is broken out into its individual owners and purchasers.
- An Oil Valuation Royalty Tax Payer record is created for each owner listed in a pipeline split and an Oil Valuation Purchaser record is created for each purchaser.
- Both the Owner and Purchaser must submit their oil valuation pricing information. The owner's price is compared to the purchaser's price as an audit check and must match.
- Some companies market their own volumes. In these cases, both the owner and the purchaser in the pipeline split are the same. This is considered non-arm's length. In these cases Petrinex does not create the Oil Valuation Purchaser record.

3. Activities at Go-Live

- Sometimes a company's producing and marketing functions can have different Business Associate IDs. As this is still a non-arm's length sale, Petrinex must be able to determine that they are related for the purposes of oil valuation and to determine whether the producer must file an EVAP declaration for that year.
- Producers may enter related purchaser BA IDs in the Audit menu section of Petrinex.
- By entering the related BA ID, Petrinex knows not to create an Oil Valuation Purchaser record when these 2 companies are used together in a pipeline split.
 - Using these 2 companies in a pipeline split also creates an EVAP reporting requirement for the producer in Petrinex.

NOTE: Even though EVAP functionality will not be turned on until 2021, producers can still enter their related BAs. This will prevent the unnecessary creation of oil valuation purchaser records.

3. Activities at Go-Live

Royalty/Tax Payer (once functionality is available)

- The RTP operator is responsible for maintaining the royalty/tax payer information for that particular stream and product for the appropriate ownership type (Crown, Freehold, etc.).
- Licensee will be RTP Operator for conversion.
- Companies that have been assigned RTP operatorship responsibility for a stream may use the Operator Changes functionality in Petrinex to request an operator change if necessary.
- Initially at Go-Live, the most likely reason would be a well Licensee who is transferring operatorship to the contracted Facility Operator that the well (stream) is linked to.

7. Creating Security Roles & Users (Primary USA)

Creating User Security Roles & User IDs

- Both the Primary and Backup USA are able to create or modify user security roles and user IDs.
- The image below shows the main menu for the USA. This presentation covers Manage User ID & Access and Manger User Roles.



- ☐ Data Submission
 - ☐ [Batch Upload](#)
- ☐ Reports and Queries
 - ☐ [Submit Report Request](#)
 - ☐ [Upload Report Request](#)
- ☐ Admin Functions
 - ☐ [Manage Quicklist](#)
- ☐ Security
 - ☐ [Manage User ID and Access](#)
 - ☐ [Manage User Roles](#)
 - ☐ [Manage Designate BA Relationship](#)
 - ☐ [Change Password](#)

- Material covered in this presentation can also be found in the PMIP Handbook in Appendix 11.

Manage User ID and Access

- This is the initial screen that is seen when first accessing the Manage User ID and Access menu item.

Menu Inbox Help Contacts Logout MB BA: [redacted] Name: PRIMARY_USA

[Admin Functions] > [Security]

Manage User ID

User ID **1**

Views **2**

Surname First Name Second Name

3 Select Go

- User ID: The USA will enter an existing User ID or a new one (to be created).
 - If the User ID is new, the USA must also fill out the Surname and First Name. The Second Name is optional.

Manage User ID and Access

The screenshot shows the 'Manage User ID' page. At the top is a navigation bar with icons for Menu, Inbox, Help, Contacts, and Logout, along with user information: MB, BA: [redacted], and Name: PRIMARY_USA. Below the navigation bar is a breadcrumb trail: [Admin Functions] > [Security]. The main heading is 'Manage User ID'. The form contains several fields: 'User ID' (labeled with a red circle 1), 'Views' (a drop-down menu labeled with a red circle 2, currently showing 'Personal Info'), 'Surname', 'First Name', and 'Second Name' (all text input fields). To the right of the 'Views' drop-down is a red circle 3 pointing to two buttons: 'Select' and 'Go'.

2. Views: The USA may use the drop-down menu to select which view (Personal Info or Facility Assignment) they would like to open for the user.
3. Select: If the User ID is unknown, the USA may click Select to open a lookup table with all of the User IDs for that BA. Once selected from the lookup, the ID is automatically populated in the User ID field along with the name information.

Once User information is entered, click Go to move to the next screen.

Manage User ID and Access

Personal Info View

Manage User ID

Views

Personal Info

Personal Information

User ID:

testuser

Surname:

Test

First Name:

User

Second Name:

Telephone:

1 - CANADA

4035551234

(Country code - number - extension)

Fax:

1 - CANADA

4035554567

(Country code - number - extension)

Email:

testuser@testco.com

Access

Experimental Confidential Wells: ☒ Yes ☐ No

Active User: ☒ Yes ☐ No

Mail Override: ☐ Yes ☒ No

Roles

Available Roles

Read Only -

EVAP Comprehensive -

Assigned Roles

Comprehensive -



Submit

Cancel

Reset Password

Save As

1. Views: The USA may use the drop-down menu to move between views (Personal Info or Facility Assignment).

Manage User ID and Access

Manage User ID

Views

Personal Info

1

Personal Information

2

User ID:

testuser

Surname:

Test

First Name:

User

Second Name:

Telephone:

1 - CANADA

-4035551234

(Country code - number - extension)

Fax:

1 - CANADA

-4035554567

(Country code - number - extension)

Email:

testuser@testco.com

Access

Experimental Confidential Wells:

☒ Yes ☐ No

3

Active User:

☒ Yes ☐ No

Mail Override:

☐ Yes ☒ No

Roles

4

Available Roles

Read Only -

EVAP Comprehensive -

Assigned Roles

Comprehensive -

<< >>

Submit

Cancel

Reset Password

Save As

2. Personal Information: Every user must have a surname, first name, phone number, and email address. Second name and fax number are optional.

Manage User ID and Access

Manage User ID

Views

Personal Info

1

Personal Information

2

User ID: testuser
Surname: Test
First Name: User
Second Name:
Telephone: 1 - CANADA -4035551234 (Country code - number - extension)
Fax: 1 - CANADA -4035554567 (Country code - number - extension)
Email: testuser@testco.com

Access

Experimental Confidential Wells: ☒ Yes ☐ No

3

Active User: ☒ Yes ☐ No

Mail Override: ☐ Yes ☒ No

Roles

4

Available Roles

Read Only -
EVAP Comprehensive -

Assigned Roles

Comprehensive -

Submit Cancel Reset Password Save As

3. Access: There are 3 access options.

- Confidential Wells – Determines whether the user should have access to view or edit confidential well data for the BA.
- Active User – Determines whether the user is active. When a user moves out of the company, this option should be set to No to remove the user's login ability.
- Mail Override – This is a special permission that can be assigned to selected personnel (usually supervisors), enabling them to access any Inbox notifications for any user in the BA.

Manage User ID and Access

Manage User ID

Views

Personal Info

1

Personal Information

2

User ID: testuser
Surname: Test
First Name: User
Second Name:
Telephone: 1 - CANADA 4035551234 (Country code - number - extension)
Fax: 1 - CANADA 4035554567 (Country code - number - extension)
Email: testuser@testco.com

Access

Experimental Confidential Wells: ☒ Yes ☐ No

3

Active User: ☒ Yes ☐ No

Mail Override: ☐ Yes ☒ No

Roles

4

Available Roles

Read Only -
EVAP Comprehensive -

Assigned Roles

Comprehensive -

Submit Cancel Reset Password Save As

4. Roles: Users must have at least one role in order to login to Petrinex. The USA will select one or more roles from the list of Available Roles and move them to the Assigned Roles list. Petrinex only creates 2 template roles.

- Comprehensive – Grants edit and query access to most tasks associated with monthly reporting and infrastructure. EVAP is not included.
- Read Only – Grants query access only to most tasks associated with monthly reporting and infrastructure. EVAP is not included.

Manage User ID and Access

Facility Assignment View

Manage User ID

Views

Facility Assignment

User ID: testuser
Surname: Test
First Name: User
Second Name:

Assigned Roles

1

- Comprehensive

Assigned Facilities

2

Blanks in Assigned Facilities box represents the "all" facility access

Submit Cancel Update Facility Assignment

3

1. Assigned Roles: Users may have different roles within the BA or may even have roles assigned as a designate of another BA. The USA can apply facility assignments to any one particular role that user may have.

Manage User ID and Access

Manage User ID

Views

Facility Assignment

User ID: testuser
Surname: Test
First Name: User
Second Name:

Assigned Roles

- Comprehensive

Assigned Facilities

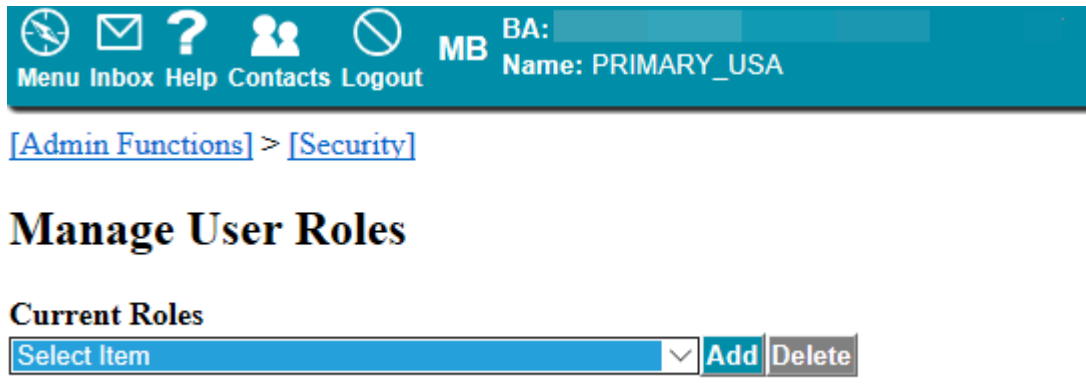
Blanks in Assigned Facilities box represents the "all" facility access

Submit Cancel Update Facility Assignment

- Assigned Facilities:** If a user has any facility assignments for the selected role, they will be listed here. If there are no facilities listed, then the user has access to all facilities pertaining to the functions associated with the role. If there are facilities listed, then the user is restricted to editing and/or viewing those specific facilities.
- Update Facility Assignment:** Clicking this button will open the Facility List Builder lookup window. From there, the USA can select the appropriate facilities for assignment. All selected facilities will be returned to the Assigned Facilities box.

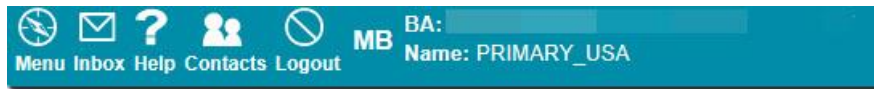
Manage User Roles

- This is the initial screen that is seen when first accessing the Manage User Roles menu item.



- User Security Roles define which reporting functions a user can perform in Petrinex. The USA can create as many customized roles as is needed by the organization.
- The USA will create a new role by linking it to Unit Tasks which represent a Petrinex screen/function.
 - For Example: Edit Volumetric Submission

Manage User Roles



[\[Admin Functions\]](#) > [\[Security\]](#)

Manage User Roles



1. Current Roles: Click the drop-down arrow to see a list of existing user roles for the BA. Select one to edit the task list or click Add to create a new user role.
2. Add New User Role: Enter the name of the new user role and click OK to edit the task list. Click Cancel to exit without creating a new role.

Manage User Roles

Manage User Roles

Current Roles

New User Role

Assigned Tasks

3

3. Assigned Tasks: Once the new User Role Name has been entered, click Task List to open the Add/Modify Tasks lookup window.

Manage User Roles

Add/Modify Tasks

Role Name: New User Role

Roles &/or Templates

BA

Template or Role Name

4

Petrinex	Comprehensive
Petrinex	EVAP Declaration
Petrinex	Marketing
Petrinex	Operations
Petrinex	Operator Well Counts

Available Tasks

Accept/Decline Facility Operator Change
Allocation - Cascade SAF Report
Allocation - OAF Report
Allocation - SAF Report
Allocation - Static Factor Report

Assigned Tasks

Accept Well to Facility Link Change



5



OK Cancel

- Role Templates: Click on any template from the top list. A list of the tasks associated with that role will be populated in the Available Tasks list below.
- Task Selection: USAs can select any tasks in the Available Tasks menu by clicking on them. Selected tasks are moved to and from the Assigned Tasks list using the Arrow buttons. Tasks can be selected from multiple templates. Once all tasks have been selected, click OK to return to the main page.

Manage User Roles

Manage User Roles

Current Roles

New User Role

6

Assigned Tasks

Accept Well to Facility Link Change
Accept/Decline Facility Operator Change
Batch Upload (Schema checking only)
Batch Upload
Business Associate Report
Cancel Pending Facility Operator Change
Cancel Pending Well to Facility Link Change
Change Commingling Well Status
Change Facility Operational Status
Change Password
Cross Border Results Processing
Delete Future Dated Facility Operator Change
Edit Facility Information
Edit Oil Valuation - Deliveries to Refineries
Edit Oil Valuation - Purchaser
Edit Oil Valuation - Royalty/Tax Payer
Edit Oil/LPG Monthly Shipper List
Edit Oil/LPG Shipper/Owner Pipeline Split
Edit Oil/LPG Static Shipper List
Edit Volumetric Distribution List
Edit Volumetric Submission
Edit Water Source Information

6. Submit New/Modified Task List: All tasks from the Assigned Task list are returned to the main page. Click Submit to save the task list. Once a new role has been created, it will be available to assign to users in the Manager User ID and Access screen.

8. Troubleshooting Tips

What do I do now?!!!

This is missing!



This isn't right!



This isn't mine!



Lookups

- Lookups are provided next to input fields. They allow the user to lookup information relevant to the data that is required in the field for the submission. Examples include:
 - UWIs
 - Facility IDs
 - Facility Subtypes
 - BA IDs
 - Products
 - Activities

Petrinex Self Serve Solutions - Infrastructure

- ☐ Infrastructure
 - ☐ Well Infrastructure
 - ☐ [Edit Well Status](#)
 - ☐ [Query Gas Oil Ratio](#)
 - ☐ [Query Well Status](#)
 - ☐ [Query Well Licence](#)
 - ☐ [Query Well](#)
 - ☐ Facility Infrastructure
 - ☐ Setup/Maintenance
 - ☐ [Request Facility ID](#)
 - ☐ [Edit Facility Information](#)
 - ☐ [Query Facility Licence](#)
 - ☐ [Query Facility Information](#)
 - ☐ [Change Facility Operational Status](#)
 - ☐ [Query Facility Operational Status](#)
 - ☐ [Request Water Source ID](#)
 - ☐ [Edit Water Source Information](#)
 - ☐ [Query Water Source Information](#)
 - ☐ [Request Waste Location ID](#)
 - ☐ [Query Waste Location ID](#)
 - ☐ Well to Facility Links
 - ☐ [Request Well to Facility Link Change](#)
 - ☐ [Accept Well to Facility Link Change](#)
 - ☐ [Cancel Pending Well to Facility Link Change](#)
 - ☐ [Request Retro-Active Well to Facility Link Change](#)
- ☐ Royalty/Tax Related Information
- ☐ Operator Changes
 - ☐ [Request Operator Change](#)
 - ☐ [Accept/Decline Operator Change](#)
 - ☐ [Cancel Pending Operator Change](#)
 - ☐ [Delete Future Dated Operator Change](#)

Petrinex Self Serve Solutions - Infrastructure

I think my Facility ID/UWI is missing! What do I do?

- Confirm that it really isn't there. For facilities, go to Query Facility Information in the menu. Use the Lookup next to Facility ID. The lookup grid system allows you to search by multiple criteria.

Facility Lookup

Filter

Reset

Identifier	Name	Subtype	Licence #	Operator ID	Operator Name	Location	Status
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		<input type="text" value="eg. 06-28-044"/>	<input type="text" value="(ALL)"/>




- Can use partial values for Identifier, Name, Location. Results will include any facility with those values.
- Can use further lookups for Subtype and Operator ID if required.

Petrinex Self Serve Solutions - Infrastructure

- For UWIs, go to Query Well in the menu. The lookup grid is the opening screen. Like facility, UWIs can be searched by multiple criteria.
- UWIs are generally referred to as wells in Petrinex.

Query Well

[Filter](#) [Reset](#)

Well ID	Name	Licence#	Licensee	Location	Licence Status	Licence Status Date	Well Status	Well Status Date
MBWI 				eg. 06-28-044 	(ALL) 		(ALL) 	eg. CR-OIL

- Can use partial values for Well ID, Name, Licence#, Location and Well Status. Results will include any facility with those values.
- Can use further lookup for Licensee BA.

Petrinex Self Serve Solutions - Facility

Ok, I checked and my Facility ID really is missing.

- You can create new facilities under the Request Facility ID menu option. Use the appropriate well/facility license number to link the new facility to.
 - Petrinex will assign a new facility ID at random. Records will need to be updated in your system to reflect new ID.

My facility has the wrong status. It should be active/inactive.

- You can change a facility's status under the Change Facility Operational Status menu option. Operators can make their facilities active or suspend them.

What if my facility has incorrect data elements?

- You can edit facility attributes under the Edit Facility ID menu option. Information you can edit includes:
 - Name
 - Location (for unlicensed facilities)
 - BT Tied to Storage/EOR Facility & Injection Facility ID
 - TM Physically Connected to Pipeline Flag & Pipeline ID

I don't agree with the subtype assigned to my facility. Can I change it?

- Industry does not have the ability to edit subtype in Petrinex. Only the ARD can change the facility subtype.

What if I get a facility that isn't mine?

- Not a high likelihood of getting another company's facilities from conversion.
- You can transfer operatorship of facilities to another BA ID under the Request Operator Change menu option.
- Concurrence is required by the new BA. Operatorship changes can be accepted or declined under the Accept/Decline Operatorship Change menu option.
- Notification is sent to the new operator when a change request is submitted. Notification is sent to the old operator when the request is either accepted or declined.

I have confirmed that my well really is missing.

- This scenario is highly unlikely as all wells should be converted to Petrinex.
- If a UWI is missing you will need to contact ARD. UWIs are created in ARD systems and pushed to Petrinex.

My well has the wrong status.

- You can change the well status under the Edit Well Status menu option. Licensees can change a well status from suspended to active producing, injection/disposal or water source.
 - Bringing a well on production for the first time will require the well to be linked to a BT.
 - Bringing a well on injection/disposal will require the well to be linked to an appropriate IF facility (EOR/water flood or disposal).
 - Bringing a well on as a water source will require the well to be linked to a WT facility.
 - Only the ARD can set abandoned statuses.

My well appears to be linked to the wrong facility. Can I change it?

- Yes. Operators of the facility that well is linked to can change the linkage under the Request Well to Facility Link Change screen.
 - If linking the well to another operator's facility, concurrence is required.
 - Operators of the new facility can accept or decline the linkage change under the Accept Well to Facility Link Change screen.

So I can't just change the Facility ID in the Edit Well Status screen?

- Generally no. Beyond the initial linkage, most changes are made in Request Well to Facility Link Change.
- There are a few circumstances where the change would be made in Edit Well Status. These are when a well status change is made that would make the original facility inappropriate for the status (ex: BT – IF).

Can I change the primary product of my well?

- No. Once the initial producing status is set for oil or gas there is no ability to change to the other product.
 - Must contact ARD for primary product changes.

How do I commingle my well events?

- There are 3 different commingling methods depending on the type of commingling scenario. These methods were all developed to meet ARD's volumetric reporting requirements.
- The following scenarios are all set up a bit differently:
 - Injection/Disposal wells with multiple events in different formations.
 - Oil Producing wells with multiple events in different formations.
 - Producing or Injecting wells with multiple wells in the same formation.

Injection/Disposal Wells, Events in Multiple Formations

- Industry will determine which event is the reporting event. This is the event in which volumetrics for all commingled events will be reported each month.
- In the Edit Well Status screen, the licensee will assign a status of WATER ACTIVE INJ REPORT to the reporting event.
 - If well is disposal, set WATER ACTIVE DISP REPORT status.
- Once status is chosen, licensee can link event to an injection facility for volumetric reporting purposes and commingle all applicable events.

Petrinex Self Serve Solutions - Well

Well Status: WATER ACTIVE INJ REPORT

Status Date: 2019-10-02

Gross Completion Interval Top: Base: **Perforation/Packer**
Field: 07 Pierson Pool: ... Lower Amaranth S

Undefined Pool: ...

Crude Oil Type:

Status:

Facility ID

Facility Name

Facility Link: ...

Commingle Events

Please ensure that all commingling is in accordance with Ministry Regulations.

Commingled	Well Event	Current Status	Start Date
<input checked="" type="checkbox"/>	MB WI	W103 WATER ACTIVE INJ N/A	2019-10-01

- Click Commingle Events button for a list of all other well events listed under the same well licence. Check all that are to be commingled.
- Commingled events will automatically be assigned a status of N/A N/A N/A COMMING. These well events are not linked to the injection facility for volumetric reporting.

Petrinex Self Serve Solutions - Well

Well Status	Well Status Start Date	Facility Link Start Date	Facility Link(s)
N/A N/A N/A COMMINGLED	2019-10-02		
WATER ACTIVE INJ N/A	2019-10-01		
N/A COMP N/A N/A	2019-09-20		
N/A N/A N/A N/A	1974-07-25		

[Add](#) [Modify](#) [Insert](#) [Delete](#) [GCI](#)

- The above scenario shows how an active injection well event was commingled and automatically assigned the commingled status.
- The commingled date was set for 2019-10-02. This was the earliest the date could be set because it had an active status that was effective as of 2019-10-01.
 - Petrinex can only support 1 status for a given date.
- This means the event was active for 1 day in the production month and will be linked to the injection facility for that month.
 - Petrinex requires a volumetric submission, but licensee may not want that.
 - In volumetrics, enter an activity of SHUTIN for that well event for the month.

Oil Producing Wells, Events in Multiple Formations

- ARD requires that each actively producing event report its monthly volumetrics separately (no reporting event). ARD would like these events reported under the same battery facility ID. To accomplish this, ARD will create a facility licence that has the same number as the well licence.
 - In the screen below, facility licence 99999 would have been created to match well licence 99999
- The producer will create a new multi-well battery using the new facility licence in the Request Facility ID screen.

Menu Inbox Help Contacts Logout MB BA: 0006 TUNDRA OIL & GAS LIMITED TEST Name: Steve MB AT

[Infrastructure] > [Facility Infrastructure] > [Setup/Maintenance]

Request Facility ID

Facility Sub-Type: 321 ... CRUDE OIL MULTIWELL GROUP BATTERY

Facility Location

LSD	SEC	TWP	RGE	M	Licence
05	25	001	26	W 1	F99999

Go

Petrinex Self Serve Solutions - Well

- In the Edit Well Status screen, the licensee will assign a status of OIL ACTIVE PROD N/A to each well event that must report volumetrics and enter the newly created battery ID in the Facility Link field.

Well Status: OIL ACTIVE PROD N/A

Status Date: 2019-10-02

Gross Completion Interval Top: **Base:** **Perforation/Packer**

Field: 03 Waskada **Pool:** ... Mission Canyon 3b B

Undefined Pool: ...

Crude Oil Type:

LIGHT Status:

TENTATIVE

Facility ID

Facility Name

Facility Link: ...

COMMINGLING TEST BATTERY

Commingle Events

Producing/Injecting Wells, Events in Same Formation

- Industry will determine which event is the reporting event. This is the event in which volumetrics for all commingled events will be reported each month.
- In the Edit Well Status screen, the licensee will assign a regular active status to the reporting event.
 - Producing Well – OIL ACTIVE PROD N/A
 - Injecting Well – WATER ACTIVE INJ N/A or WATER ACTIVE DISP N/A
- Once status is chosen, licensee can link event to a battery or injection facility for volumetric reporting purposes.

Petrinex Self Serve Solutions - Well

- In the Edit Well Status screen, the licensee will assign a DRAIN status to any commingled events.
 - Producing Well – OIL N/A PROD DRAIN
 - Injecting Well – WATER N/A INJ DRAIN
- There is no ability to link a drain well to a facility. All volumetrics are reported at the reporting event.

Well Status: OIL N/A PRODUCING DRAIN

Status Date: 2019-10-02

Gross Completion Interval Top: **Base:** **Perforation/Packer**

Field: 03 Waskada

Crude Oil Type:

Status:

Facility ID Facility Name

Commingle Events

Petrinex Monthly Reporting

- ☐ Monthly Reporting
 - ☐ Volumetric
 - ☐ [Edit Volumetric Submission](#)
 - ☐ [Query Volumetric Submission](#)
 - ☐ [Request Volumetric Non-Compliance Error Report](#)
 - ☐ [Edit Volumetric Distribution List](#)
 - ☐ Oil/LPG Pipeline Splits
 - ☐ [Edit Oil/LPG Monthly Shipper List](#)
 - ☐ [Edit Oil/LPG Static Shipper List](#)
 - ☐ [Edit Oil/LPG Shipper/Owner Pipeline Split](#)
 - ☐ [Request Oil/LPG Missing/Incomplete Report](#)
 - ☐ [Query Oil/LPG Shipper/Owner Pipeline Split](#)
 - ☐ [Query Oil/LPG Static Shipper List](#)
 - ⊕ Gas Pipeline Splits
 - ☐ Allocation
 - ☐ [Edit Stream Allocation Factor](#)
 - ☐ [Query Stream Allocation Factor](#)
 - ☐ [Edit Owner Allocation Factor](#)
 - ☐ [Query Owner Allocation Factor](#)
 - ☐ [Edit SAF/OAF Volumes](#)
 - ☐ [Query SAF/OAF Volumes](#)
 - ⊕ Waste Plant
 - ⊕ Gas Valuation
 - ☐ Oil Valuation
 - ☐ [Edit Oil Valuation - Purchaser](#)
 - ☐ [Query Oil Valuation - Purchaser](#)
 - ☐ [Edit Oil Valuation - Deliveries to Refineries](#)
 - ☐ [Query Oil Valuation - Deliveries to Refineries](#)
 - ☐ [Edit Oil Valuation - Royalty/Tax Payer](#)
 - ☐ [Query Oil Valuation - Royalty/Tax Payer](#)
 - ☐ [Request Oil Valuation Compliance and Balancing Report](#)
 - ☐ [Request Oil Valuation Existing Pending or Pending Delete Records Report](#)
 - ☐ WIP Maintenance

Petrinex rejected the BA ID in my submission. I think this BA is missing?

- A BA ID is required in a number of areas of Petrinex.
 - Oil Pipeline Splits Owner/Purchaser ID
 - Allocations Owner ID
 - Royalty Tax Payer records
 - Various Reports.
- Ensure that you are using the correct 4 digit BA ID.
 - All of ARD's 4 digit numerical codes for active companies were converted to Petrinex.

Petrinex Monthly Reporting – Business Associate

- Confirm the BA ID is really missing. Use the lookup next to the input field that requires the BA ID.
 - BA Name can be a partial search.

BA Lookup

Help ?

Filter Reset

BA ID	BA Name	Petrinex Status	Corporate Status	Effective Date
eg. 0A0A		(All) ▾	(All) ▾	
0288	1576062 ALBERTA LTD.	ACTIVE	ACTIVE	2019-05-01
0012	2928419 MANITOBA LIMITED	ACTIVE	ACTIVE	2019-05-01
0007	494889 ALBERTA INCORPORAT...	ACTIVE	ACTIVE	2019-05-01
0022	618555 SASKATCHEWAN LTD.	ACTIVE	ACTIVE	2019-05-01
0183	6660894 CANADA LTD.	ACTIVE	ACTIVE	2019-05-01
0597	7313314 MANITOBA LTD.	ACTIVE	ACTIVE	2019-05-01
0025	ANTLER RIVER RESOURCES L...	ACTIVE	ACTIVE	2019-05-01
0342	BALCOR COMPANY	ACTIVE	ACTIVE	2019-05-01

- If BA ID is really missing, may have to contact the company.
- Don't miss deadlines if BA can't be set up in time!
 - Use own BA ID if have to in order to avoid non-compliance errors.
 - Amendments can be made later.

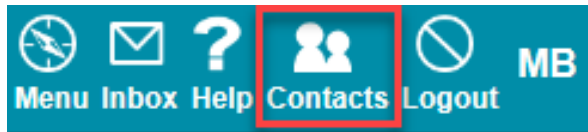
Petrinex Monthly Reporting - Volumetrics

Somebody submitted a receipt from my facility, but I didn't deliver anything there. Now I'm out of balance! How do I get rid of this?

- Receipts auto-populate dispositions in Petrinex. The auto-created disposition can't be deleted.
 - Contact the operator of the receiving facility. They must amend their submission to remove the auto-populated row from the disposing facility.

How do I find out who to contact?

- You can find out who submitted the entry in the Query Volumetric Submission screen.
 - Query the volumetric submission for the facility that received the product from your facility.
 - Click the Contacts button at the top of the screen.



Petrinex Monthly Reporting - Volumetrics

- The Contacts pop-up window displays contact information for the person who submitted the volumetrics for the facility.

Contact Information

BA Id: 0006
BA Name: TUNDRA OIL & GAS LIMITED TEST
Last Name: Freeman
First Name: Steve
Middle Name: M
Telephone: 1 - 444 555 4444
Email: vipir_syt@enr.gov.ab.ca

Audit Information

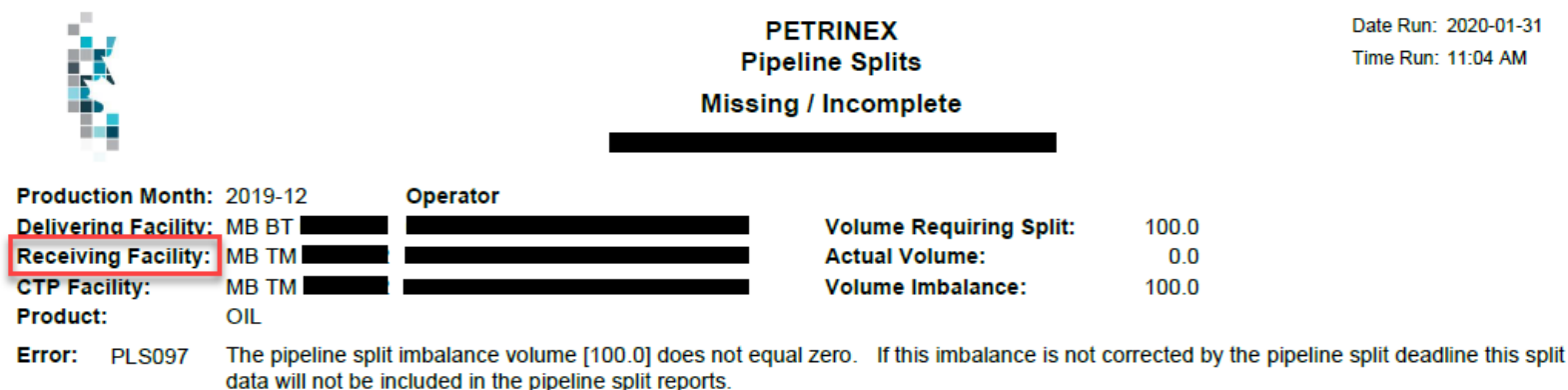
Created		Last Updated	
Date:	2020-01-23 08:44:19	Date:	2020-01-23 08:44:19
BA Id:	0006	BA Id:	0006
BA Name:	TUNDRA OIL & GAS LIMITED TEST	BA Name:	TUNDRA OIL & GAS LIMITED TEST
Last Name:	Freeman	Last Name:	Freeman
First Name:	Steve	First Name:	Steve
Middle Name:	M	Middle Name:	M
Telephone:	1 - 444 555 4444	Telephone:	1 - 444 555 4444
Email:	vipir_syt@enr.gov.ab.ca	Email:	vipir_syt@enr.gov.ab.ca
Date Received:	2020-01-23 08:43:51	Data Source:	VOL_SUB_EDIT
Method:	BATCH	Reference Id:	B08

Cancel

Petrinex Monthly Reporting – Pipeline Splits

Somebody cascaded an oil split volume to me, but this isn't mine.

- A volume has shown up on your Oil/LPG Missing/Incomplete report that isn't yours.



The screenshot shows a Petrinex Pipeline Splits report for a missing/incomplete split. The report includes a header with the Petrinex logo, the title 'PETRINEX Pipeline Splits Missing / Incomplete', and the run date/time. The main body contains fields for Production Month, Delivering Facility, Receiving Facility, CTP Facility, Product, and Operator. The Receiving Facility field is highlighted with a red box. To the right, summary statistics show a volume requiring split of 100.0 and an actual volume of 0.0, resulting in a volume imbalance of 100.0. An error message at the bottom states that the pipeline split imbalance volume [100.0] does not equal zero and that this data will not be included in the reports.


PETRINEX Pipeline Splits Missing / Incomplete		Date Run: 2020-01-31 Time Run: 11:04 AM	
Production Month:	2019-12	Operator	
Delivering Facility:	MB BT		Volume Requiring Split: 100.0
Receiving Facility:	MB TM		Actual Volume: 0.0
CTP Facility:	MB TM		Volume Imbalance: 100.0
Product:	OIL		
Error:	PLS097 The pipeline split imbalance volume [100.0] does not equal zero. If this imbalance is not corrected by the pipeline split deadline this split data will not be included in the pipeline split reports.		

- The Delivering Facility is your facility (the cascaded to facility). The Receiving Facility is the facility that cascaded to yours.
- Query the volumetric submission for the Receiving facility and use the Contacts button to find out who the production accountant is.
 - Can't query another operator's pipeline splits submission.

Petrinex Monthly Reporting – RTP Oil Valuation

There's a volume on my Oil Valuation Compliance & Balancing Report that isn't mine.

- RTP Oil Valuation is required whenever you are named as an “Owner” in a pipeline splits submission.



PETRINEX
Oil Valuation
Compliance and Balancing

Date Run: 2020-01-31
Time Run: 11:13 AM

Production Month: 2019-11

Missing/Incomplete Royalty/Tax Payer Oil Valuation

Production Month: 2019-11

Unit / Facility ID	Delivering Facility ID	Receiving Facility ID	Custody Transfer Point Facility	Owner Contract Number	Purchaser	Sale Volume
MB BT		MB TM	MB TM			200.0

Error: OVE001 No price has been entered for this sale

- Query the volumetric submission for the Facility ID (or the Delivering Facility if the reporting Facility ID is a unit) and use the Contacts button to find out who the production accountant is.
 - Can't query another operator's pipeline splits submission.

Can someone help me?

- The Petrinex Business Desk has fully trained personnel to address any questions or concerns relating to Petrinex functionality.

Phone: 403-297-6111 (Calgary)

Toll Free: 1-800-992-1144

Email: petrinexsupport@petrinex.ca

9. Important Dates

Important Dates

Prior to Petrinex Go-Live		
Target	Activity	Responsibility
Now	<ul style="list-style-type: none"> Submit Industry Interoperability (IIO) Test files. 	Vendors/Industry
Now	<ul style="list-style-type: none"> Begin reviewing SK Learning Modules. 	Industry
Ongoing	<ul style="list-style-type: none"> Review conversion files and communicate errors, missing data, updates, applicable commingled well licenses. Submit BA Data Collection Form and USA Authorization Letter. 	Industry
March	<ul style="list-style-type: none"> Begin releasing Learning Modules with MB updates. 	Communications Team
Mar 20	<ul style="list-style-type: none"> Deadline to submit BA Data Collection Form and USA Authorization Letter (necessary to log in at Go-Live). 	Industry
Apr 9	<ul style="list-style-type: none"> Deadline to include Facility, Well Linkage data in final conversion for Go-Live. 	Industry
TBD	<ul style="list-style-type: none"> Login/Password information communicated to Primary USA. 	ARD


Important Dates

Important Dates

Post Petrinex Go-Live		
Target	Activity	Responsibility
May 4	<ul style="list-style-type: none"> Petrinex Go-Live for April Production Month. 	Project Team
	<ul style="list-style-type: none"> Primary USA sets up users and roles for their company. 	Industry
Early May	<ul style="list-style-type: none"> Update opening inventories for all operated facilities. 	Industry
	<ul style="list-style-type: none"> Make any corrections to well status, well-facility linkages, facility operatorship, operational status, etc. 	Industry
	<ul style="list-style-type: none"> Set up injection/disposal commingled wells (if previously instructed to do so). 	Industry
	<ul style="list-style-type: none"> Enter any Related BA relationships for Oil Valuation purposes. 	Industry
May 21	<ul style="list-style-type: none"> Petrinex Volumetric & Pipeline Splits Submission Deadline. 	Industry
May 29	<ul style="list-style-type: none"> Petrinex Oil Valuation Submission Deadline. 	Industry
TBD	<ul style="list-style-type: none"> Release Learning Modules for RTP/RTA. 	Communications Team
TBD	<ul style="list-style-type: none"> Request an Operator Change for any stream (well, unit) in which another BA should be responsible for submitting Royalty Tax Payer information. 	Industry


10. Steps to Readiness Review

Steps to Readiness Summary

1.	Identify and Register a Change Leader for your Company.	
2.	Understand the impacts of PBCIP on your Company.	Now
3.	Have a Plan to respond to New Changes.	Now
4.	Prepare your Systems.	Now
5.	Ensure your staff members are Trained.	Now
6.	Implement required Pre-Go-Live activities.	Ongoing
7.	Go-Live and get the benefits.	April 6


- You have already registered your Change Leader.
- The Change Leader will receive all project updates and Industry Conversion Data reports. The Change Leader must also ensure that all responses (conversion facilities, well linkages, oil purchasers, appropriate commingled well licence numbers) are sent on time.

Steps to Readiness Summary

1.	Identify and Register a Change Leader for your Company.	
2.	Understand the impacts of PBCIP on your Company.	Now
3.	Have a Plan to respond to New Changes.	Now
4.	Prepare your Systems.	Now
5.	Ensure your staff members are Trained.	Now
6.	Implement required Pre-Go-Live activities.	Ongoing
7.	Go-Live and get the benefits.	April 6


- Continue to read updates in the PMIP Industry Readiness Handbook
- Create a plan to determine which members of your company must be engaged in readiness activities.
 - Conversion activities prior to Go-Live.
 - Post Go-Live activities.
 - Review Appendix 11 of the PMIP Handbook.

Steps to Readiness Summary

1.	Identify and Register a Change Leader for your Company.	
2.	Understand the impacts of PBCIP on your Company.	Now
3.	Have a Plan to respond to New Changes.	Now
4.	Prepare your Systems.	Now
5.	Ensure your staff members are Trained.	Now
6.	Implement required Pre-Go-Live activities.	Ongoing
7.	Go-Live and get the benefits.	April 6


- Take the opportunity to test upload files.
 - **Now accepting IIO test files for all monthly reporting functions.**
- Minimum computer specifications for Petrinex are provided in Appendix 7 of the PMIP Industry Readiness Handbook.

Steps to Readiness Summary

1.	Identify and Register a Change Leader for your Company.	
2.	Understand the impacts of PBCIP on your Company.	Now
3.	Have a Plan to respond to New Changes.	Now
4.	Prepare your Systems.	Now
5.	Ensure your staff members are Trained.	Now
6.	Implement required Pre-Go-Live activities.	Ongoing
7.	Go-Live and get the benefits.	April 6

- USA passwords and instructions for setup will be communicated close to Go-Live. USAs also should review instructions for creating users and roles.
- MB learning modules to be developed pending Manitoba decision.
 - Can access SK learning module content immediately.
 - RTP/RTA to be developed and released closer to functionality release.

Steps to Readiness Summary

1.	Identify and Register a Change Leader for your Company.	
2.	Understand the impacts of PBCIP on your Company.	Now
3.	Have a Plan to respond to New Changes.	Now
4.	Prepare your Systems.	Now
5.	Ensure your staff members are Trained.	Now
6.	Implement required Pre-Go-Live activities.	Ongoing
7.	Go-Live and get the benefits.	April 6

- Review details and important dates presented today to ensure required activities are completed on time.
 - Complete BA Data Collection Form and USA Authorization Letter.
 - Review Industry Data Conversion reports and submit any changes/corrections.
 - Provide well licenses for applicable commingling scenario.
 - Post Go-Live activities.
- The PMIP Industry Readiness Handbook will be updated with details from this presentation.



PETRINEX
CANADA'S PETROLEUM INFORMATION NETWORK

Questions



By acceptance of the attached material, all parties acknowledge that all material released by Petrinex is to be used for the sole purpose as agreed to by Petrinex. This material shall not be used for any other purpose or disclosed to any other party without prior approval by Petrinex.