



Learning Aid: Oil Forecast Submissions CSV Specifications



Learning Aid: Oil Forecast Submissions Spreadsheet Upload Specifications

Dated: January 26, 2017

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Introduction

There are two main ways that you can submit monthly data to Petrinex. You can submit data:

- **Online.** The Petrinex online forms allow you to enter data that is reported to Petrinex.
- **Batch upload process.** In a batch submission, you create data in your internal system in a XML (Extensible Markup Language) format and then upload it to Petrinex. . You can also create your data in spreadsheets, and upload this data directly to Petrinex as a CSV (Comma Separated Values) file.

You may upload data in spreadsheets for the following Oil Forecast processes:

- **Oil Forecast Submissions** – submit changes to forecast information as required based on operational knowledge. These updates/changes can be done at the facility or well event level.
- **Oil Forecast Facility User List** – create and update groupings of facilities. These groupings are a subset of the BA's facilities and can be used to view and report the forecast data via these groupings instead of one facility or all facilities for the BA.

For examples of other processes that include CSV upload functionality see the Job Aids on the Petrinex Website – Resource Centre – Training Job Aid – Spreadsheet Upload Specifications and Templates.

These include, but not limited to:

- AB Volumetrics, Allocations, Pipeline Splits, Waste Plants, Mineable Oil Sands
- SK Volumetrics, Pipeline Splits, Valuation, Royalty/Tax Payer, Waste Plant
- AB Crown Shippers' Balance
- APMC Report Submissions
- DOE Natural Gas Liquids Pricing
- Enhanced Production Audit Program (EPAP) – EPAP Declaration Theme
- AB Cost Allowance

Be Aware: The oil forecast submission (csv uploads) data fields were created to match the output (report) and therefore use the same template. This means all the columns must be in the submission but depending on what is being submitted (i.e. Facility View List Update, Facility Update and Well Event Update) some data fields should be left blank. If data is submitted in these fields then it will be ignored, however if the column is not included then the file will fail.

Note: Each spreadsheet upload is considered a full-facility replacement for the reported month and facility. Each upload that you make to Petrinex overwrites earlier uploads, therefore new submissions must include all data for the month for the facility. If you report additional data after the first submission, then you must resubmit the initial data along with the new data.



Create and Save Data within a Spreadsheet

You must follow specific rules to create and save data in a spreadsheet for upload to Petrinex. For example, you can only upload data created within a spreadsheet, if that data is saved as a CSV (Comma Separated Values) file. Petrinex does not accept data on a spreadsheet saved as any other format. You may create spreadsheets in any spreadsheet software (such as Microsoft Excel) that can save as a CSV file.

For illustration purposes only, Microsoft Excel conventions are used in the following step-by-step procedures. In this example, we use the terms spreadsheet and worksheet. A worksheet is an individual page that is organized into columns and rows, and is always stored in spreadsheet. A spreadsheet may contain many worksheets. Note: Microsoft Excel refers to spreadsheets as workbooks.

Follow these steps to create, and save data within a spreadsheet before uploading the data to Petrinex.

Step 1. Download the worksheet template for the work process data that you want to upload.

To download the worksheet template, complete the following steps.

- a. Go to the Petrinex Website - Resource Centre – Training Job Aids- Spreadsheet Upload Specifications and Templates*
 - b. Click the Job Aid – Oil Forecast Submissions Spreadsheet Upload Templates.**
- * The template document can also be accessed from the Petrinex Website – Initiatives – APMC/Industry Conventional Oil Forecast Tool Project – Job Aid – Oil Forecast Submissions Spreadsheet Upload Templates.

**For information on how to use the Oil Forecast Submissions Templates, click on the Job Aid – How to Create Groups of Batteries for Petrinex Oil Forecast Tool Functions located on the Petrinex Website – Initiatives – APMC/Industry Conventional Oil Forecast Tool Project – Job Aids – How to Create Groups of Batteries for Petrinex Oil Forecast Tool Functions.

Step 2. Create a new worksheet from the template.

- a. Create a new worksheet within your existing spreadsheet.
- b. Copy the provided template into your new worksheet, or type the header row from the template into your new worksheet. Row 1, the header row, must contain the column descriptions in your new worksheet.

Note: You may only include one work process (Oil Forecast Submissions) per worksheet, but you may include multiple facilities (note the data must be sorted by facility) when submitting a file to Petrinex. The order of the header row must match the order that is specified in the templates for Oil Forecast Submissions work processes.

Header Row

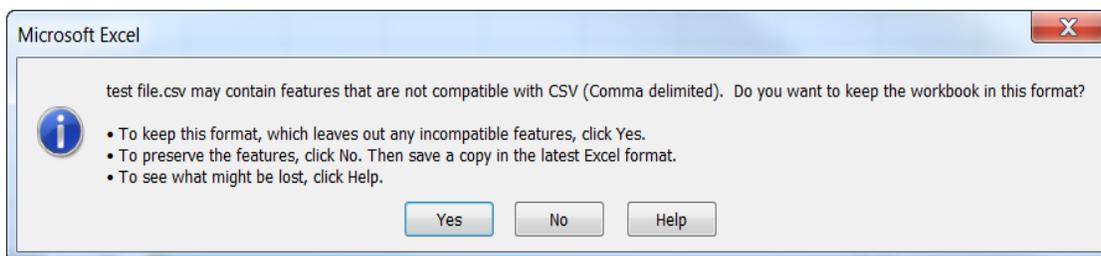
	A	B	C	D
1	Verb	Noun	Format Version	Submitting Facility Province
2				
3				
4				

Step 3. Enter the data from your existing spreadsheet into the new worksheet.



Starting in Row 2, copy, move, paste, or link the appropriate data from your spreadsheet into the new worksheet.

- Step 4.** Select/highlight all data on the worksheet. Choose Format – Cells – Number (tab) and choose Text. Click OK. All data on the worksheet must be in text format prior to saving in .csv format.
- Step 5.** Save your new worksheet. You may only save the worksheet in CSV format for upload to Petrinex. Further, only the active worksheet may be saved as a CSV file. Multiple worksheets, within a single spreadsheet, must be saved as individual CSV files, and uploaded separately.
- On the File menu, select **Save As**
 - Type the file name that you want to use
 - Select the CSV (Comma delimited) (*.csv) file type
 - Click **Save**. The following message appears.



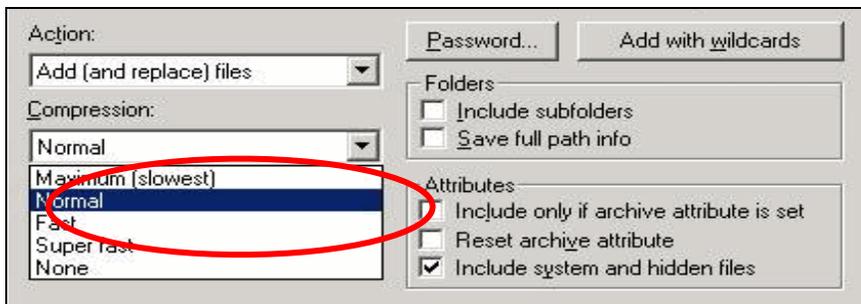
- Click Yes.

If you were to open this worksheet at this point, you will lose all of the preceding zero's in any of the data. Example BA Code 0123 would show as 123, Facility Identifier 0000123 would show as 123. If you were to upload this document to Petrinex in this manner it would not be accepted as it would not meet the required schema. Therefore we need to create a worksheet in text to upload.

- Open a new Excel worksheet, and click on Data to import your saved worksheet into this new worksheet.
- Click "From Text" to open the Import Text file window
- Highlight the document that you previously saved and click Import.
- This opens the Text Import Wizard:
 - Click the radio button – Delimited and click Next
 - Change the radio button under Delimiters from Tab to Comma and click Next.
 - You will want to change all of the columns to be Text rather than General. To do this – Hold down the Shift Key and using the scroll bar on the bottom bring it as far to the right as you can. This will highlight all of the columns.
 - Click the radio button Text
 - Click Finish
 - You are now asked where you want to put the data? Click the radio button – Existing Worksheet and click OK.
 - Save the new worksheet in a .csv file format – you can overwrite the original if you choose to ensure that you do not try to upload the wrong version.



Large files may be compressed, using the file compression utilities PKZIP or WinZip, or the built-in compression utility within Microsoft XP (referred to as NTFS compression). When using WinZip, files must be compressed in the **Normal** compression mode, as shown below. It is recommended that any files over 5Mg should be zipped.



Note: only one file can be included in a zipped file.

- Step 6.** Submit the saved worksheet (with the .csv file extension) to Petrinex. You may only upload one file to Petrinex at a time.
- Access Petrinex, using your Web browser.
 - On the Main Menu, select **Data Submission** and then **Batch Upload**.
 - Type in your CSV file location and name, or use the **Browse** button to locate the file.
 - Click **Upload**. You will receive an onscreen message indicating if the file is uploaded successfully. We recommend that you record the file incoming key number. If the batch was to fail, this number will help the Petrinex staff in assisting in determining the cause of the failure.
 - You will receive an e-mail notification detailing the results of the upload when Petrinex has processed the submitted upload.



Oil Forecast Update Facility View List Worksheet Format

Spreadsheet Column	Data element	Example Field Content	Format	Required on each row? Y/N	Comments
A	Verb	UPDATE or DELETE		Y	UPDATE and DELETE are the only 2 valid verbs
B	Noun	OFFACILITYLIST		Y	OFFACILITYLIST is the only valid noun
C	Format Version	001	(prefix with 0's)	Y	Current is 001
D	Forecast Month	2017-05	YYYY-MM	Y	The initial forecast month that this list applies too. If unchanged and not deleted it will be used in subsequent months.
E	View	DEL BT ABBT1234567	36 Chars	Y	The User assigned name for this grouping (Facility View) of facilities. Often organized by delivering/form A facility
F	ProvinceState	AB	2 Chars	Y	If Verb UPDATE: AB is the only valid province If Verb DELETE: Not Required Leave blank
G	Type	BT	2 Chars	Y	If Verb UPDATE: BT is the only valid type If Verb DELETE: Not Required Leave blank.
H	Identifier	1234567	7 Digits	Y	If Verb UPDATE: Must be valid id. If Verb DELETE: Not Required Leave blank

Please note: "Required on each row?" applies if the data element is required per the comment section.



Oil Forecast Update Submission Worksheet Format

Spreadsheet Column	Data element	Example Field Content	Format	Required on each row? Y/N	Comments
A	VERB	UPDATE		Y	UPDATE is the only valid verb
B	NOUN	OILFORECAST		Y	OILFORECAST is the only valid noun
C	FORMAT VERSION	001	(prefix with 0's)	Y	Current is 001
D	BA ID	ABCD	4 chars	Y	Must be the operator of the facilities being forecast
E	FORECAST MONTH	2017-05	YYYY-MM	Y	
F	ASOFDATE			N	Data not required, but need to include the column - leave this blank
G	FACILITYVIEWLIST	Delivery Bty Group ABBT0000001	Maximum 36 characters	Y/N	Data only required when the report type is VIEWLIST . Data is not required for report type FACILITY or WELL EVENT but need to include the column.
H	INITIALGROSSFORECASTVL				Data not required, but need to include the column - leave this blank
I	GROSSFORECASTVL				This is the adjusted gross production volume for the Group of BT Facilities included in the VIEWLIST. Data only required when the report type is VIEWLIST . Data is not required for report type FACILITY or WELL EVENT but need to include the column.
J	CROWNFORECASTVL				Data not required, but need to include the column - leave this blank
K	CROWNPERCENTAGEVL				Data not required, but need to include the column - leave this blank



Spreadsheet Column	Data element	Example Field Content	Format	Required on each row? Y/N	Comments
L	NONCROWNFO RECASTVL				Data not required, but need to include the column - leave this blank.
M	FACILIYT PROVINCE/STA TE	AB	2 chars	Y	Data only required when the report type is FACILITY . AB is the only valid Province. Data not required for report type VIEWLIST or WELLEVENT but need to include the column.
N	FACILITY TYPE	BT	2 chars	Y	BT is the only valid Type
O	FACILITY IDENTIFER	0001001	7 digits (prefix with 0's)	Y	
P	FACILITY NAME			N	Data not required, but need to include the column - leave this blank
Q	REPORT TYPE	VIEWLIST		Y	VIEWLIST, FACILITY and WELLEVENT are the only 3 options
R	INITIAL GROSS FORECASTBT			N	Data not required, but need to include the column - leave this blank
S	FINAL GROSS FORECASTBT	200.0	Max 1 digits after decimal	Y	This is the adjusted gross production volume for the BT. Can be left blank if the report type is VIEWLIST or WELLEVENT
T	CROWNFOREC ASTBT			N	Data not required, but need to include the column - leave this blank
U	CROWNPERCE NTAGEBT			N	Data not required, but need to include the column - leave this blank
V	BENEFITPGMBT			N	Data not required, but need to include the column - leave this blank
W	NONCROWNFO RECASTBT			N	Data not required, but need to include the column - leave this blank
X	AMENDMENTNU MBER			N	Data not required, but need to include the column - leave this blank



Spreadsheet Column	Data element	Example Field Content	Format	Required on each row? Y/N	Comments
Y	PROVINCESTAT EWI	AB	Max 2 chars	Y	Data only required if Report Type is WELLEVENT . AB is the only valid province. Data not required for Report Type VIEWLIST or FACILITY, but need to include the column.
Z	TYPEWI	WI	Max 2 chars	Y	Data is only required if Report Type is WELLEVENT WI is the only valid type. Data not required for Report Type VIEWLIST or FACILITY, but need to include the column.
AA	IDENTIFIERWI	100010200304W400	max 16 digits	Y	Data only required if Report Type is WELLEVENT . WI is the only valid type. Data not required if Report Type is VIEWLIST or FACILITY, but need to include the column.
AB	WELLEVENTNA ME			N	Data not required, but need to include the column - leave this blank
AC	INITIALGROSSF ORECASTWI			N	Data not required, but need to include the column - leave this blank
AD	GROSSFORECA STWI	25.5	Max 1 digit after decimal	Y	This is the adjusted gross production volume for the Well. Data only required if Report Type is WELLEVENT . Data not required if Report Type is VIEWLIST or FACILITY, but need to include the column.
AE	CROWNFOREC ASTWI			N	Data not required, but need to include the column - leave this blank
AF	CROWNPERCE NTAGEWI			N	Data not required, but need to include the column - leave this blank
AG	BENEFITPGMWI			N	Data not required, but need to include the column - leave this blank
AH	NONCROWNFO RECASTWI			N	Data not required, but need to include the column - leave this blank
AI	DENSITYCODE			N	Data not required, but need to include the column -



Spreadsheet Column	Data element	Example Field Content	Format	Required on each row? Y/N	Comments
					leave this blank
AJ	CROWNOILINTE RESTPERCENT			N	Data not required, but need to include the column - leave this blank
AK	ROYALTYATTRI BUTE			N	Data not required, but need to include the column - leave this blank

Please note: "Required on each row?" applies if the data element is required per the comment section.



Template Examples

Update OFT Facility List

	A	B	C	D	E	F	G	H
1	VERB	NOUN	REVISION	FORECASTMONTH	VIEW	PROVINCESTATE	TYPE	IDENTIFIER
2	UPDATE	OFFACILITYLIST	001	2017-04	Form A Delivery Battery #1	AB	BT	0000001
3	UPDATE	OFFACILITYLIST	001	2017-04	Form A Delivery Battery #1	AB	BT	0000002
4	UPDATE	OFFACILITYLIST	001	2017-04	Form A Delivery Battery #1	AB	BT	0000003
5	UPDATE	OFFACILITYLIST	001	2017-04	Form A Delivery Battery #4	AB	BT	0000004
6	UPDATE	OFFACILITYLIST	001	2017-04	Form A Delivery Battery #5	AB	BT	0000005
7	UPDATE	OFFACILITYLIST	001	2017-04	Form A Delivery Battery #5	AB	BT	0000006
8	UPDATE	OFFACILITYLIST	001	2017-04	Form A Delivery Battery #5	AB	BT	0000007
9	UPDATE	OFFACILITYLIST	001	2017-04	Form A Delivery Battery #5	AB	BT	0000008
10	UPDATE	OFFACILITYLIST	001	2017-04	Form A Delivery Battery #5	AB	BT	0000009
11	UPDATE	OFFACILITYLIST	001	2017-04	Form A Delivery Battery #5	AB	BT	0000010
12	UPDATE	OFFACILITYLIST	001	2017-04	Form A Delivery Battery #5	AB	BT	0000011
13	UPDATE	OFFACILITYLIST	001	2017-04	Form A Delivery Battery #5	AB	BT	0000012
14	UPDATE	OFFACILITYLIST	001	2017-04	Form A Delivery Battery #5	AB	BT	0000013
15	UPDATE	OFFACILITYLIST	001	2017-04	Form A Delivery Battery #5	AB	BT	0000014
16	UPDATE	OFFACILITYLIST	001	2017-04	Form A Delivery Battery #5	AB	BT	0000015
17	UPDATE	OFFACILITYLIST	001	2017-04	Form A Delivery Battery #5	AB	BT	0000016

Delete OFT Facility List

	A	B	C	D	E	F	G	H
1	VERB	NOUN	REVISION	FORECASTMONTH	VIEW	PROVINCESTATE	TYPE	IDENTIFIER
2	DELETE	OFFACILITYLIST	001	2017-06	Form A Delivery Battery #1			
3								
4								
5								
6								



Update Oil Forecast – Fac List

	A	B	C	D	E	F	G	H
1	VERB	NOUN	REVISION	BAID	FORECASTMONTH	ASOFDATE	FACILITYVIEWLIST	INITIALGROSSFORECASTVL
2	UPDATE	OILFORECAST	001	0001	2016-03		View List1	
3								
4								
5								
6								

	I	J	K	L	M	N	O	P	Q	R
1	GROSSFORECASTVL	CROWNFORECASTVL	CROWNPERCENTAGEVL	NONCROWNFORECASTVL	PROVINCESTATE	TYPE	IDENTIFIER	FACILITYNAME	REPORTTYPE	INITIALGROSSFORECASTBT
2	50000								VIEWLIST	
3										
4										
5										
6										

	S	T	U	V	W	X	Y	Z	AA
1	GROSSFORECASTBT	CROWNFORECASTBT	CROWNPERCENTAGEBT	BENEFITPGMBT	NONCROWNFORECASTBT	AMENDMENTNUMBER	PROVINCESTATEWI	TYPEWI	IDENTIFIERWI
2									
3									
4									
5									
6									

	AB	AC	AD	AE	AF	AG	AH	AI	AJ	AK
1	WELLEVENTNAME	INITIALGROSSFORECASTWI	GROSSFORECASTWI	CROWNFORECASTWI	CROWNPERCENTAGEWI	BENEFITPGMWI	NONCROWNFORECASTWI	DENSITYCODE	CROWNNOILINTERESTPERCENT	ROYALTYATTRIBUTE
2										
3										
4										
5										
6										

Update Oil Forecast - Facility

	A	B	C	D	E	F	G	H	I	J	K
1	VERB	NOUN	REVISION	BAID	FORECASTMONTH	ASOFDATE	FACILITYVIEWLIST	INITIALGROSSFORECASTVL	GROSSFORECASTVL	CROWNFORECASTVL	CROWNPERCENTAGEVL
2	UPDATE	OILFORECAST	001	0001	2016-06						
3											
4											
5											
6											

	L	M	N	O	P	Q	R	S	T	U	V	W
1	NONCROWNFORECASTVL	PROVINCESTATE	TYPE	IDENTIFIER	FACILITYNAME	REPORTTYPE	INITIALGROSSFORECASTBT	GROSSFORECASTBT	CROWNFORECASTBT	CROWNPERCENTAGEBT	BENEFITPGMBT	NONCROWNFORECASTBT
2		AB	BT	0000002		FACILITY		500				
3												
4												
5												
6												

	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	AH
1	AMENDMENTNUMBER	PROVINCESTATEWI	TYPEWI	IDENTIFIERWI	WELLEVENTNAME	INITIALGROSSFORECASTWI	GROSSFORECASTWI	CROWNFORECASTWI	CROWNPERCENTAGEWI	BENEFITPGMWI	NONCROWNFORECASTWI
2											
3											
4											
5											
6											

	AG	AH	AI	AJ	AK
1	BENEFITPGMWI	NONCROWNFORECASTWI	DENSITYCODE	CROWNNOILINTERESTPERCENT	ROYALTYATTRIBUTE
2					
3					
4					
5					
6					



Update Oil Forecast – Well Event

	A	B	C	D	E	F	G	H	I	J	K	L
1	VERB	NOUN	REVISION	BAID	FORECASTMONTH	ASOFDATE	FACILITYVIEWLIST	INITIALGROSSFORECASTVL	GROSSFORECASTVL	CROWNFORECASTVL	CROWNPERCENTAGEVL	NONCROWNFORECASTVL
2	UPDATE	OILFORECAST	001	0001	2016-03							
3	UPDATE	OILFORECAST	001	0001	2016-03							
4												
5												
6												

	M	N	O	P	Q	R	S	T	U	V	W	X
1	PROVINCESTATE	TYPE	IDENTIFIER	FACILITYNAME	REPORTTYPE	INITIALGROSSFORECASTBT	GROSSFORECASTBT	CROWNFORECASTBT	CROWNPERCENTAGEBT	BENEFITPGMBT	NONCROWNFORECASTBT	AMENDMENTNUMBER
2	AB	BT	0000003		WELLEVENT							
3	AB	BT	0000003		WELLEVENT							
4												
5												
6												

	Y	Z	AA	AB	AC	AD	AE	AF	AG	AH	AI
1	PROVINCESTATEWI	TYPEWI	IDENTIFIERWI	WELLEVENTNAME	INITIALGROSSFORECASTWI	GROSSFORECASTWI	CROWNFORECASTWI	CROWNPERCENTAGEWI	BENEFITPGMWI	NONCROWNFORECASTWI	DENSITYCODE
2	AB	WI	10001020304005W400				100				
3	AB	WI	10002020304005W400				150				
4											
5											
6											

	AJ	AK
1	CROWNNOILINTERESTPERCENT	ROYALTYATTRIBUTE
2		
3		
4		
5		
6		