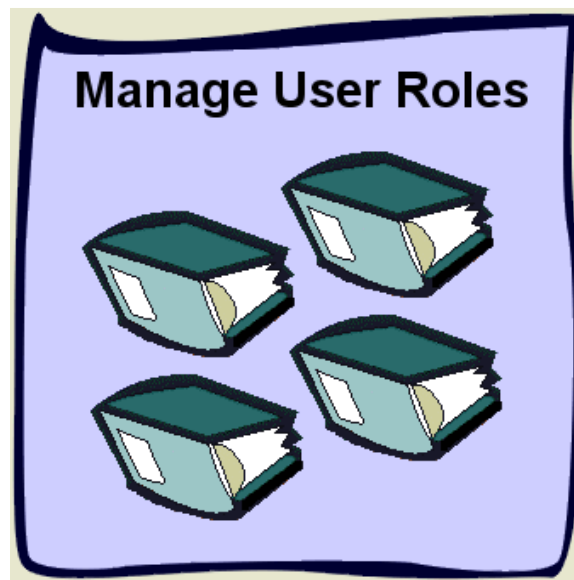




# Learning Aid: BA User Upload Spreadsheet Specifications



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## Reference Materials

This Learning Aid is intended as a supplement to the Petrinex Training Modules. The following training modules will provide you with additional information on Petrinex reporting practices.

- 2.2 – Manage User Roles
- 2.3 – Manage User ID's and Access
- 2.4 – Manage Designate BA Relationship
- 2.5 – Manage User Account Report
- 4.02 – Manage Data Submission – WIP and Batch



## Introduction

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

Online: 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, and then upload it to Petrinex. The standard for batch file submission is XML (Extensible Markup Language). You can also create your data in spreadsheets and upload this data directly to Petrinex as a CSV (Comma Separated Values) file.

Note: This upload file can also be used to update all other user information except new User ID and new password.

Note: Each batch upload is considered a "full-form" replacement for the applicable user. Each upload that you make to Petrinex overwrites earlier uploads, so new submissions must include all data for the effected user. 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 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 Resource Centre website page
- b. Click the Job Aid – APMC Report Submissions Spreadsheet Upload Templates.

**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.

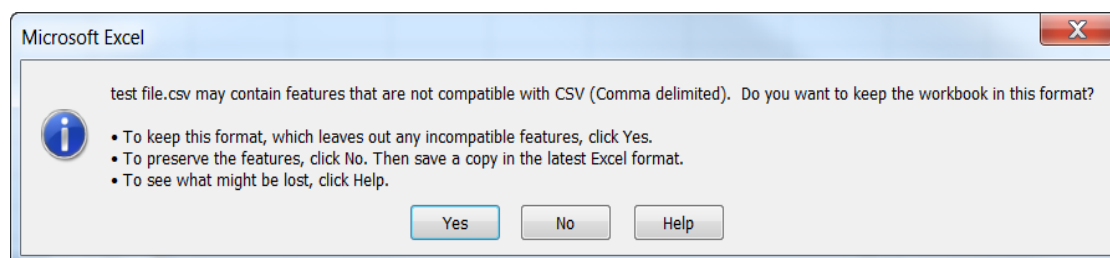
**Note:** You may only include one work process submission per worksheet, but you may include multiple users when submitting a file to Petrinex. The order of the header row must match the order that is specified in the templates for each work process.



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.

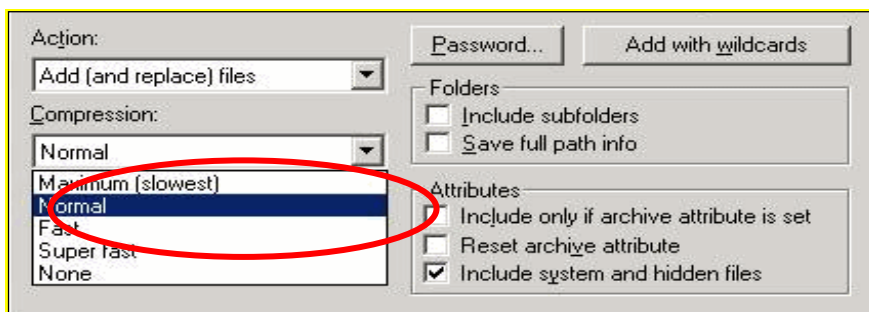
If you were to open this worksheet at this point, you will lose all of the preceding zero's in any of the data. Example BA Code 0123 would show as 123, Facility Identifier 0000123 would show as 123. If you were to upload this document to Petrinex in this manner it would not be accepted as it would not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



- b. Click “From Text” to open the Import Text file window
- c. Highlight the document that you previously saved and click Import.
- d. This opens the Text Import Wizard:
  1. Click the radio button – Delimited and click Next
  2. Change the radio button under Delimiters from Tab to Comma and click Next.
  3. 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.
  4. Click the radio button Text
  5. Click Finish
  6. You are now asked where you want to put the data? Click the radio button – Existing Worksheet and click OK.
  7. 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.
- a. Access Petrinex, using your Web browser.
  - b. On the Main Menu, select **Data Submission** and then **Batch Upload**.
  - c. Type in your CSV file location and name, or use the **Browse** button to locate the file.
  - d. 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.  
e. You will receive an e-mail notification detailing the results of the upload when Petrinex has processed the submitted upload.

**Step 7.** Each month you can use the spreadsheet (saved in step 5) to update the information, then simply repeat Steps 5 & 6.

## Downloadable Validation Results

A downloadable report is available for all batch validation notifications associated with **Validation Failure and Validation Success with Warning**. This will not impact batch Validation Success notifications. The original “text only” notification details will still be available; however, this downloadable version will allow sorting and filtering of validation results.

On the Petrinex In-Box Notifications screen a dropdown icon will be displayed beside the appropriate validation results notification. Clicking on this icon will open a download window to open the file.

### Petrinex In-Box Notifications

Date/Time	Notification #	Message Subject	↓ Facility ID	Facility Name
2024-07-22 14:28	OPS015	Validation Results OPS (Split): Failure - [CR 4...	↓	

The downloaded file will open in csv and display information specific to the type of batch file that was submitted. Standard columns include the type of file submitted, file number, number of submissions: received, successful, partially successful and rejected. All the other columns will detail the various data elements submitted and any error message codes and descriptions applicable to this particular type of batch submission.

This downloadable file will allow users to save, filter and sort their notifications results making it easier to find the items that need attention.





## Using the BA User by Role and Facility Report to Make Changes to Users Information

Petrinex has designed the BA User by Role and Facility Report so that it can easily be modified and then saved as a csv file to upload for user changes.

1. The USA or Backup USA using the Request Report option selects the BA User by Role and Facility Report and clicks Go.
2. Select All or make the appropriate selections to get the user you want to change or a user who has the roles and facilities you now want to assign to another user.
3. Select Report Format csv.
4. Click Submit. The Report will run almost immediately and you will receive a notification when it is complete.
5. Open the notification details and Click on Report.
6. A new window opens asking if you want to Open or Save the file select Save.
  - a) Save the report on your computer using a file name you choose. Open a new excel spreadsheet. Click on "Data" – From Text
  - b) Choose your saved file.
  - c) Click Import
  - d) Check Delimited – Next
  - e) Remove checkmark beside Tab, check Comma – Next
  - f) Highlight all data. Move bottom slide bar to far right hand side, click the Shift Key – Change from General to Text
  - g) Click Finish
  - h) Click OK
7. To use the report as a CSV User change upload you must:
  - a) Delete the **Facility Name, Password Change Date** and **Last Login Date** columns
  - b) Add three 3 columns to the beginning of the data.
    - Column A = VERB - each row would be Change
    - Column B = NOUN - each row would be User
    - Column C = REVISION - each row would be 001
8. Cut, paste and update the appropriate data.

Note: The User Role should not include the company name. (i.e. Read Only, Not Read Only – Company XXX).
9. Save the modified report as a CSV file. The file can now be uploaded to Petrinex using the Batch Upload function.



## BA User Worksheet Format

<u>Column</u>	<u>Data Element</u>	<u>Example Field Content</u>	<u>Format</u>	<u>Required on each row? Y/N</u>	<u>Comment</u>
A	Verb	CHANGE		Y	CHANGE is the only valid verb
B	Noun	USER		Y	USER is the only valid noun
C	Revision	001	(prefix with 0's)	Y	Current is 001
D	User ID	Mary_Smith		Y	Must already exist as a valid user ID
E	User First Name	Mary		Y	Must be supplied
F	User Surname	Smith		Y	Must be supplied
G	User Second Name			Y	Can be blank
H	Phone Country Code	1		Y	1 = Canada Must be supplied
I	Phone Number	4032661234		Y	Must be a valid phone number
J	Phone Ext			N	Can be blank
K	Fax Country Code	1		Y	1 = Canada Must be supplied
L	Fax Number	4032661235		Y	
M	Fax Ext			Y	
N	Email	abc@def.ca		Y	Must be supplied
O	Confidential Access Flag	Y	Y or N	Y	Can only be Y or N
P	Experimental Access Flag	Y	Y or N	Y	Can only be Y or N
Q	Mail Override	N	Y or N	Y	Can only be Y or N
R	Active User	Y	Y or N	Y	Can only be Y or N
S	User Role Name	Comprehensive	Alpha character Maximum	Y	Must be a valid User Role for the BA.
T	BAID	ABCD	Max 4 character	Y	Must be a valid BA – BA IDs different than the submitting BA are associated with designate relationships and roles
V	Facility Identifier	ABBT1234567	Max 2 character Prov code, 2 character Facility Code and 7 digits facility ID	Y	Must be a valid Facility ID, however can be blank. Blank indicates all facilities operated by the BA