

## HOW TO USE THE ENHANCED PRODUCTION AUDIT PROGRAM (EPAP) DASHBOARD

Jurisdiction	Release/Revision Date	Comment
AB	September 19, 2014	Initial Release
Note: Even though the screen prints in this job aid refer to an Alberta operator, the functionality is the same for Saskatchewan operators.		

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### Introduction

The dashboard screen is a part of the Enhanced Production Audit Program (EPAP) functionality in Petrinex. It can be found under Audit/EPAP on the Main Menu.

The dashboard is a new Petrinex concept introduced exclusively for EPAP in Petrinex. This screen pulls information from a variety of EPAP functions onto one screen for review that will allow users to effectively manage and prioritize their workload. From this screen, links are also provided to other areas of Petrinex. It is recommended that any users utilizing EPAP functionality use the dashboard as the starting point for EPAP reporting activities.

The following image provides an overview of the look and feel of the dashboard. The screen is comprised of four sections providing a summary of the following EPAP functions:

- Workflow
- Declaration
- CAI Reports
- CAI Status – Acceptable

## EPAP Dashboard

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### + Workflow

Workflow	BA ID	BA Name	Status (All Active)	Type (All)	CAI # (All)	Due Date	Title	Filter Reset
<a href="#">741</a>	0001	GLOBAL OIL LTD.	Industry	CAI	119	2014-09-30	Excessive Venting Concerns	GO
<a href="#">782</a>	0001	GLOBAL OIL LTD.	Industry	VSD		2014-11-15	Acid Gas Reporting	GO
<a href="#">851</a>	0001	GLOBAL OIL LTD.	Open	IR	103		Oil Proration - BT 0123456	GO
<a href="#">803</a>	0001	GLOBAL OIL LTD.	Pending	IR	154		Oil Imbalance - BT 0004321	GO
<a href="#">821</a>	0001	GLOBAL OIL LTD.	Pending	IR	171		No Gas Reported	GO
<a href="#">815</a>	0001	GLOBAL OIL LTD.	Pending	VSD			Fuel Gas Estimation	GO
<a href="#">701</a>	0001	GLOBAL OIL LTD.	Regulator	CAI	173		Proration Factors Out	GO

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### + Declarations

BA ID	BA Name	Status (All)	Month	Due Date	Filter Reset
0001	GLOBAL OIL LTD.	Open	2014-02	2014-04-30	GO
0001	GLOBAL OIL LTD.	Approved	2013-02	2013-04-30	GO
0001	GLOBAL OIL LTD.	Approved	2012-02	2012-04-30	GO

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### + CAI Reports

Prod Month	Created Date	Download	Query
2014-02	2014-07-23	Download	Query
2014-01	2014-07-23	Download	Query

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### + CAI Status - Acceptable

 Expiry Mode  Query Mode

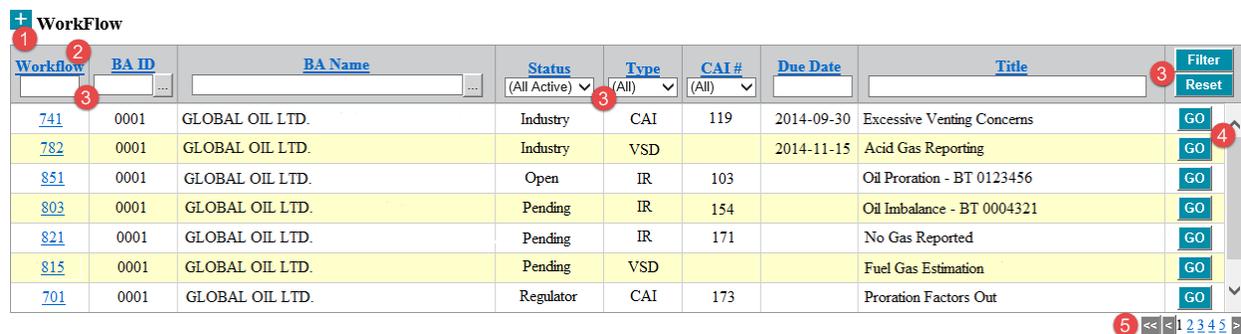
BA ID	BA Name	Facility ID	CAI # (All)	Regulator Acceptable 2014-02	Regulator Workflow	Reg. Stat. (All)	Industry Reviewed (All)	Industry Workflow	Ind. Stat. (All)	Filter Reset
0001	GLOBAL OIL LTD.	<a href="#">ABBT0005522</a>	125	2014-02	<a href="#">512</a>	C	2015-02	<a href="#">505</a>	C	
0001	GLOBAL OIL LTD.	<a href="#">ABBT0257752</a>	176	2014-03	<a href="#">556</a>	C	2014-03	<a href="#">537</a>	C	
0001	GLOBAL OIL LTD.	<a href="#">ABGS0009991</a>	125	2014-03	<a href="#">602</a>	C				

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## Workflow Section

The primary purpose of this section is to help prioritize workflows that need immediate attention. The secondary purpose is to provide a search mechanism whereby any workflow item can be found. Initially, this section will provide a list of the BA's workflows sorted by Due Date, Status, Type, CAI #, and Workflow #. Sorting and filtering options are available that allow the user to re-order and track workflows in the list.

The annotated image below provides a list of the options and features available in this section.



Workflow	BA ID	BA Name	Status	Type	CAI #	Due Date	Title	Filter Reset
<a href="#">741</a>	0001	GLOBAL OIL LTD.	Industry	CAI	119	2014-09-30	Excessive Venting Concerns	GO
<a href="#">782</a>	0001	GLOBAL OIL LTD.	Industry	VSD		2014-11-15	Acid Gas Reporting	GO
<a href="#">851</a>	0001	GLOBAL OIL LTD.	Open	IR	103		Oil Proration - BT 0123456	GO
<a href="#">803</a>	0001	GLOBAL OIL LTD.	Pending	IR	154		Oil Imbalance - BT 0004321	GO
<a href="#">821</a>	0001	GLOBAL OIL LTD.	Pending	IR	171		No Gas Reported	GO
<a href="#">815</a>	0001	GLOBAL OIL LTD.	Pending	VSD			Fuel Gas Estimation	GO
<a href="#">701</a>	0001	GLOBAL OIL LTD.	Regulator	CAI	173		Proration Factors Out	GO

1. **Expand & Collapse:** This section initially displays the top 7 rows in the list. Clicking the **[+]** will expand the list to 20 rows. Once expanded, clicking the **[-]** will collapse the list back to 7 rows.
2. **Sorting:** The blue-text, underlined **Column Headers** can be used for sorting. Clicking on any of these headers will sort the workflow list by that informational field in ascending order. Clicking the header again will re-sort the list by that field in descending order.
3. **Filtering:** Each informational field has either a **Text Field** or **Drop-Down List** filter that can be used to narrow the list to a particular group of workflows or find a specific workflow item.

Text Field filters include:

- **Workflow:** Enter a workflow number to locate a specific workflow item belonging to that BA.
- **BA ID & BA Name:** These fields are only relevant to the Regulator as Industry users may only see workflows that pertain to their BA.
- **Due Date:** Entering a specific due date will return all results that have a due date that is equal to or greater than the date entered. Due dates are entered in the format of YYYY-MM-DD.
- **Title:** Users may enter a complete or partial title to search for specific workflows. To conduct a partial search, enter a **% symbol** both preceding and following the text entry, for example **%new%**. The filter will return all results containing that text string anywhere within the title.

Drop-Down List filters include:

- **Status:** The list contains options to search for groups of workflows based on their status. Initially this filter is set to **(All Active)**. This returns all workflows that contain a status that is considered to be active including Open, Pending, Regulator, and Industry. This filter also has an **(All)** option. This essentially removes any status filter and returns all results. Users can also search for any specific workflow status including **Open, Pending, Regulator, Industry, Closed or Cancelled**.
- **Type:** This list contains options to search for groups of workflows based on their type. Initially this filter is set to **(All)**. This option returns all results (filter is not applied). The list contains all options for a user to search for any specific workflow type including **BA, CAI, Declaration Review, Industry Review, Regulator Review, and Voluntary Self Disclosure**.
- **CAI #:** This list contains a complete list of **CAI Numbers and Descriptions**. This allows the user to search for all workflows pertaining to a particular CAI number. Initially this filter is set to **(All)**, which returns all results (filter is not applied).

Filters can be applied cumulatively, meaning that a user may set more than one filter when searching for particular workflows. Once all filter options are set, click the **Filter** button to perform the search. Click the **Reset** button to remove all sorting and filtering and return the filter settings to their default positions.

4. **Go Button:** The Go button provides a link to the workflow screens. Clicking the Go button will open the specific workflow item in either the **Edit or Query EPAP Workflow** screen. Depending on the workflow Type, Status, and the user's Security Role, an active workflow will be opened in the Edit screen. All inactive workflows and active workflows in which the user does not have edit rights will be opened in the Query screen provided the user has security access to that screen.
5. **Pagination Buttons:** For large lists of workflow items, buttons are provided to navigate through the various pages. Each page contains 50 rows.

**Note:** For more information on workflows, including the creation and management of a workflow, security issues, and workflow screen functionality, please review **Training Module 8.02 Manage EPAP Workflow** in the **Resource Centre** section of the Petrinex website.

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## Declaration Section

The purpose of this section is to provide a complete list of a BA's current and historical EPAP declarations. Initially, this list will be sorted by Due Date. Sorting and Filtering options are available that allow the user to re-order and search for specific declarations.

The annotated image below provides a list of the options and features available in this section.

**+ Declarations**

<b>BA ID</b>	<b>BA Name</b>	<b>Status</b>	<b>Month</b>	<b>Due Date</b>	<b>Filter</b>
<input type="text"/>	<input type="text"/>	(All) <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Filter"/> <input type="button" value="Reset"/>
0001	GLOBAL OIL LTD.	Open	2014-02	2014-04-30	<input type="button" value="GO"/>
0001	GLOBAL OIL LTD.	Approved	2013-02	2013-04-30	<input type="button" value="GO"/>
0001	GLOBAL OIL LTD.	Approved	2012-02	2012-04-30	<input type="button" value="GO"/>

<< < 1 2 3 4 5 > >>

- Expand & Collapse:** This section initially displays the top 3 rows in the list. Clicking the **[+]** will expand the list to 20 rows. Once expanded, clicking the **[-]** will collapse the list back to 3 rows.
- Sorting:** Like the other sections, **Column Headers** can be used for sorting. Clicking on any of these headers will sort the declaration list by that informational field in ascending order. Clicking the header again will re-sort the list by that field in descending order.
- Filtering:** This section also has **Text Field** or **Drop-Down List** filters that can be used to either narrow the list to a particular group of declarations or find a specific declaration.

Text Field filters include:

- BA ID & BA Name:** These fields are only relevant to the Regulator as Industry users may only see declarations that pertain to their BA.
- Month:** The month field refers to the **Declaration Month** in which the BA's 12 month declaration period ends. It is entered in the format YYYY-MM. Entering a specific declaration month/year allows the user to locate a declaration for specific year/period.
- Due Date:** The due date field refers to the due date that a declaration has to be **submitted to the AER**. It is entered in the format YYYY-MM-DD. This field provides another mechanism for locating a declaration for a specific year/period.

Drop-Down List filters include:

- Status:** The list contains options to search for declarations based on their status. Initially this filter is set to **(All Active)**. This returns all declarations that contain a status that is

considered to be active including Open, Incomplete, Complete, Submitted, and Rejected. This filter also has an **(All)** option which returns all results (filter is not applied). Users can also search for any specific declaration status including **Open, Incomplete, Complete, Submitted, Accepted, Rejected, and Waived.**

As with the other sections, filters can be applied cumulatively. Once all filter options are set, click the **Filter** button to perform the search. Click the **Reset** button to remove all sorting and filtering and return the filter settings to their default positions.

4. **Go Button:** The Go button provides a link to the declaration screens. Clicking the Go button will open the specific declaration in either the **Edit or Query EPAP Declaration** screen. If the declaration is in an editable status, it will open in the Edit screen provided the user has security access (edit rights) to that screen. Otherwise, declarations are opened in the Query screen, provided the user has access to that screen.
5. **Pagination Buttons:** For large lists of declarations, buttons are provided to navigate through the various pages. Each page contains 50 rows.

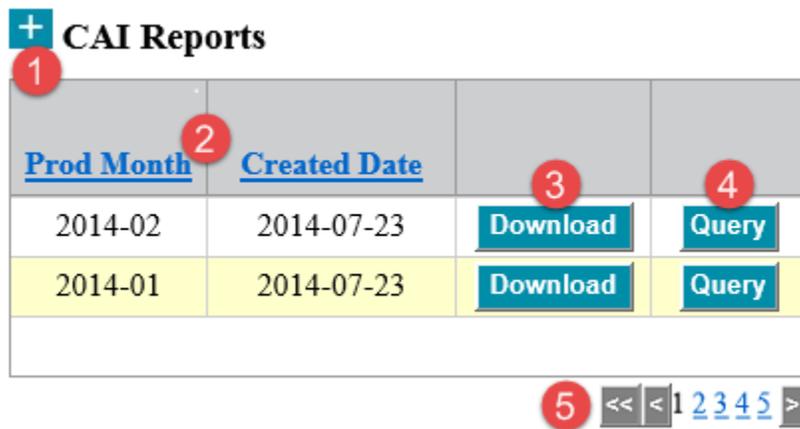
**Note:** For more information on declarations, including the completion and submission of the declaration, security issues, and declaration screen functionality, please review **Training Module 8.1 Manage EPAP Declaration** in the **Resource Centre** section of the Petrinex website.

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## CAI Reports Section

The purpose of this section is to provide a list of the current and historical monthly CAI Reports generated for the BA. Reports are listed by production month. The monthly CAIs can be either downloaded or queried online from this section. It should be noted that this is the only area within Petrinex where the monthly CAI Report can be downloaded. Reports are only generated for production months in which at least one CAI has been triggered.

The annotated image below provides a list of the options and features available in this section.



<u>Prod Month</u>	<u>Created Date</u>		
2014-02	2014-07-23	Download	Query
2014-01	2014-07-23	Download	Query

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1. Expand & Collapse: This section initially displays the top 3 rows in the list. Clicking the **[+]** will expand the list to 20 rows. Once expanded, clicking the **[-]** will collapse the list back to 3 rows.
2. Sorting: **Column Headers** can be used for sorting. Although there are fewer fields than other sections, clicking either of the headers will sort the list of CAI Reports by that informational field in ascending order. Clicking the header again will re-sort the list by that field in descending order.
3. Download Button: Clicking the download button will generate a **CSV (spreadsheet)** version of the CAI Report for the production month specified. Once generated, the report can be found in the user's **Petrinex Inbox**. A user may only generate the report provided they have access the **Query CAI** screen in Petrinex (indicating the user has security access to review CAIs).
4. Query Button: Clicking the query button provides a link to the **Query CAI** screen in Petrinex for the production month specified, provided the user has access to that screen.
5. Pagination Buttons: For large lists of CAI Reports, buttons are provided to navigate through the various pages. Each page contains 50 rows.



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**Note:** For more information on CAIs, including what information is provided online or within the CAI Report, please review **Training Module 8.3 Manage CAI Process** in the **Resource Centre** section of the Petrinex website.

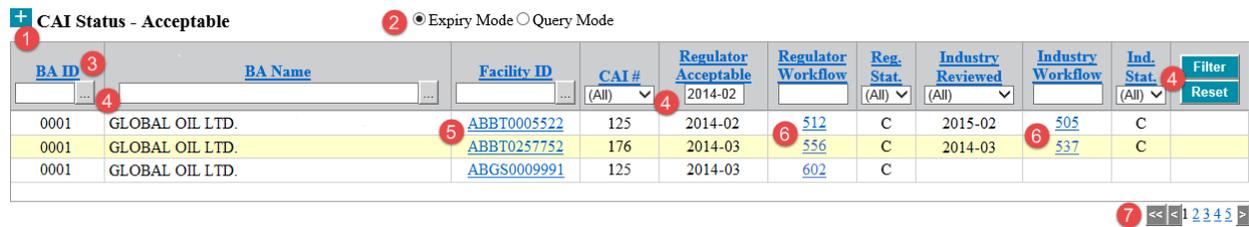
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## CAI Status – Acceptable Section

The primary purpose of this section is to display a list of all of the BA’s facilities with a CAI that have a **Regulator Acceptable Date** that will expire within 2 months (starting with the current production month). This is the default view for this section.

The secondary purpose of this section is to provide a search mechanism by which a user could search for any of the BA’s facilities that have associated with either a Regulator or Industry CAI investigation workflow (regardless of whether the facility was assigned a Regulator Acceptable or Industry Reviewed Date).

The annotated image below provides a list of the options and features available in this section.



+ CAI Status - Acceptable <span style="float: right;">2 <input checked="" type="radio"/> Expiry Mode <input type="radio"/> Query Mode</span>										
BA ID	BA Name	Facility ID	CAI #	Regulator Acceptable	Regulator Workflow	Reg. Stat.	Industry Reviewed	Industry Workflow	Ind. Stat.	Filter
			(All) v	2014-02	512	(All) v	(All)		(All) v	4 Filter
0001	GLOBAL OIL LTD.	ABBT0005522	125	2014-02	512	C	2015-02	505	C	
0001	GLOBAL OIL LTD.	ABBT0257752	176	2014-03	556	C	2014-03	537	C	
0001	GLOBAL OIL LTD.	ABGS0009991	125	2014-03	602	C				

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1. **Expand & Collapse:** This section initially displays the top 4 rows in the list. Clicking the **[+]** will expand the list to 20 rows. Once expanded, clicking the **[-]** will collapse the list back to 4 rows.
2. **Expiry/Query Mode:** When this section is in **Expiry Mode**, only those facilities that have a CAI with a **Regulator Acceptable Date** expiring within 2 months (the current month or the following month) will be displayed. Any filtering applied to the list while in this mode will only return results with the context of the 2 month expiry date. This section is defaulted to the Expiry Mode initially.

When this section is in **Query Mode**, the condition of having a Regulator Acceptable Date expiring in the next 2 months is removed. A user may then search for any facility that has been associated with either a **Regulator or Industry CAI investigation workflow**.

There is a benefit to this section concerning searches involving **Industry Reviewed Dates**. When Industry is conducting an Industry Review Workflow investigation for a CAI, facilities can be added to the workflow whether they have generated the CAI or not. This allows for the inclusion of all facilities that share the same conditions in one investigation. Industry Reviewed Dates can be added to these facilities as well, even though they have not yet generated the CAI. These facilities will not show up in the Query CAI screen or the CAI Report until they have actually generated the CAI; however, these facilities can be found in this section while in the Query Mode.

3. Sorting: Like all other sections, **Column Headers** can be used for sorting. Clicking on any of these headers will sort the declaration list by that informational field in ascending order. Clicking the header again will re-sort the list by that field in descending order.
4. Filtering: This section also has **Text Field** or **Drop-Down List** filters that can be used to either narrow the list to a particular group of facility/CAIs or find a specific facility/CAI.

Text Field filters include:

- **BA ID & BA Name**: These fields are only relevant to the Regulator as Industry users may only see items that pertain to their BA.
- **Facility ID**: Users can enter a specific **Facility ID** in this field to narrow the list to only those CAIs pertaining to that facility. Clicking the **Facility Lookup button [...]** will open the **Facility Identifier Lookup** in order to search for a specific Facility ID. Users may also conduct a partial search to narrow the list down to a group of facilities. To do this, enter a **% sign** both preceding and following the text entry. For example, entering **%BT%** would return results for all of the BA's battery facilities.
- **Regulator Acceptable**: The regulator acceptable date is entered in the format YYYY-MM. When in **Expiry Mode**, entering a regulator acceptable date will return all results expiring in the next 2 months from the date entered (equal to or greater than up to 2 months). When in **Query Mode**, entering a regulator acceptable date will return all results equal to or greater than the date entered. If this field is left blank, Petrinex will default the value back to the current production month.
- **Regulator/Industry Workflow**: In either the regulator or industry workflow field, the user may enter a specific workflow number to narrow the list to only those facilities associated with that specific workflow number.

Drop-Down List filters include:

- **CAI #**: This list contains a complete list of **CAI Numbers and Descriptions**. This allows the user to search for all workflows pertaining to a particular CAI number. Initially this filter is set to **(All)**, which returns all results (filter is not applied).
- **Reg. Stat & Ind. Stat**: The **Regulator Status** and **Industry Status** fields refer to the status of the Regulator or Industry workflow number. Each list contains options to search for groups of workflows based on their status. Initially these filters are set to **(All)**, which returns all results (filter is not applied). There is also an option for **(All Active)**. This returns all workflows that contain a status that is considered to be active including Open, Pending (Industry only), Regulator, and Industry. There is an option for **(Blanks)**, which returns all results that do not have a status. Users can also search for any specific workflow status including **Open, Pending (Industry only), Regulator, Industry, or Closed**. There is no option for **Cancelled** in this section.
- **Industry Reviewed**: This section has options to search for groups of results based on whether an **Industry Reviewed Date** exists or not. Initially this filter is set to **(All)**, which

returns all results (filter is not applied). Users may also choose **(Blanks)**, which returns all results that do not have an industry reviewed date or **(Non-Blanks)**, which returns all results that have an industry reviewed date.

As with the other sections, filters can be applied cumulatively. Once all filter options are set, click the **Filter** button to perform the search. Click the **Reset** button to remove all sorting and filtering and return the filter settings to their default positions.

5. Facility ID: Clicking on any of the Facility ID numbers will open the **Query Facility Infrastructure** screen for that specific facility provided the user has access to that screen.
6. Regulator or Industry Workflow Numbers: Clicking any workflow number (Regulator or Industry) will open the specific workflow item in either the **Edit or Query EPAP Workflow** screen. Depending on the workflow Type, Status, and the user's Security Role, an active workflow will be opened in the Edit screen. All inactive workflows and active workflows in which the user does not have edit rights will be opened in the Query screen provided the user has security access to that screen.
7. Pagination Buttons: For large lists of Facility/CAI items, buttons are provided to navigate through the various pages. Each page contains 50 rows.

**Note:** For more information on the purposes and uses of the Regulator Acceptable and Industry Reviewed Dates, please review **Training Module 8.2 Manage EPAP Workflow** in the **Resource Centre** section of the Petrinex website.

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