



# **Petrinex IOGC Inclusion Project Industry Readiness Handbook**

Version 2.10

## PIIP Industry Readiness Handbook Change Log

Version	Release Title	Key Changes	Release Date
V1.0	Initial Release		
V1.1		Added Appendix 6	April 19, 2018
V1.2		Section 1.3 and Appendix 6 – IOGC Industry Change Summary - Mineral Ownership (FN Interest) – Target Change Date - Product Pricing – Target Change Date	June 22, 2018
V1.3		Section 1.3 and Appendix 6 – IOGC Industry Change - IOGC/Petrinex Communications – Target Change Date - Mineral Ownership (FN interest) – Target Change Date	September 25, 2018
V1.4		Section 1.3 and Appendix 6 – IOGC Industry Change - IOGC/Petrinex Communications – Target Change Date	October 2, 2018
V1.5		Section 1.3, Appendix 2 - Changes from Current IOGC Reporting Processes and Appendix 6 – IOGC Industry Change - IOGC/Petrinex Communications – Target Change Date	November 28, 2018
V1.6		Section 1.3, Appendix 2 - Changes from Current IOGC Reporting Processes and Appendix 6 – IOGC Industry Change - IOGC/Petrinex Communications – Target Change Date	January 14, 2019
V1.7		Section 1.3, Appendix 2 - Changes from Current IOGC Reporting Processes and Appendix 6 – IOGC Industry Change - IOGC/Petrinex Communications – Target Change Date	<i>February 5, 2019</i>
V1.8		Appendix 1 – IOGC Advisory Notice, Appendix 2 –Overview of IOGC GCA Management in Petrinex (entire appendix update), Appendix 4 – Information on Petrinex Training Resources, Appendix 5 – Frequently Asked Questions.	<i>May 17, 2019</i>
V1.9		Appendix 2 – Miscellaneous tips, reminders and important items to note. Items 12 and 18.	<i>May 21, 2019</i>
V2.0		Formatting Changes Appendix 2 - Change in IOGC Policy on submission of Final IOGC GCA Rate Approval Table 1.3a – Production Allocation Discrepancy Report Table 1.3a – Target Change Date	<i>June 18, 2019</i>
V2.1		Table 1.3a – Target Change Date	<i>February 12, 2020</i>
V2.2		Table 1.3a – Target Change Date	<i>May 21, 2020</i>
V2.3		Table 1.3a – Target Change Date Section 1.5 – IOGC Contact Information Appendix 4 – Information on Petrinex Training Resources	<i>June 29, 2020</i>
V2.4		Appendix 1 – IOGC Communications	<i>July 2, 2020</i>
V2.5		Table 1.3a – Target Change Date	<i>October 2020</i>
V2.6		Table 1.3a – Target Change Date	<i>January 2022</i>
V2.7		Table 1.3a – Target Change Date for Alberta Modernized Royalty Framework (MRF) and removed “auto-populated” from the AB only comment section	<i>May 2022</i>
V2.8		Table 1.3a – Target Change Date for Alberta Modernized Royalty Framework (MRF) has been updated to April 6, 2022 and AB Go-Live has been updated to December 2022.	<i>August 24/22</i>
V2.9		Table 1.3a – Target Change Date for AB Data Submission has been updated to December 2022, IOGC/Petrinex Communications for AB has been updated to December 2022 and AB Working Interest Owner Report has been updated to December 2022.	<i>November 1/22</i>
V2.10		Table 1.3a – Data Submission – see comments highlighted in yellow	<i>December 20/22</i>
<b>All changes are highlighted in yellow</b>			
<b>Notes</b>			
<ul style="list-style-type: none"> <li><b>IOGC Change Leaders will be notified of all updates to this Handbook.</b></li> </ul>			

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## 1.0 Overview

### 1.1 The Petrinex IOGC Inclusion Project (PIIP)

As an operator of oil and/or gas wells/facilities on lands managed by Indian Oil and Gas Canada (IOGC), you may already be aware that IOGC has initiated a project to join Petrinex to improve its regulatory and royalty management processes. The 24 month Petrinex IOGC Inclusion Project is part of a larger IOGC modernization project that keys off a new Indian Oil and Gas Act which received Royal Assent in May 2009. The 2009 Act, along with a set of core regulations, are expected to both become law in early 2019.

For stakeholders to derive optimal benefit, IOGC's on-reserve oil and gas legislative and regulatory regime will be implemented via modernized business practices supported by new information systems. IOGC's Resource Information Management System 2 (RIMS2) project includes:

1. the Petrinex IOGC Inclusion Project;
2. a new royalty management system for IOGC; and,
3. introduction of elements of a case management system at IOGC.

Petrinex is a collaborative strategic organization supporting Canada's upstream, midstream and downstream oil and gas industry and is represented by Government [Alberta Department of Energy (DOE), the Saskatchewan Ministry of the Energy and Natural Resources (SER), the Alberta Energy Regulator (AER)], the British Columbia Ministries of Finance (BCFIN) and Energy, Mines and Low Carbon Innovation (BCEMLI), the Manitoba Ministry of Natural Resources and Northern Development (MBNRND) and Industry [represented by the Canadian Association of Petroleum Producers (CAPP) and the Explorer and Producers Association of Canada (EPAC)] For more information on Petrinex please visit the website [www.petrinex.ca](http://www.petrinex.ca).

Design and development activities related to IOGC inclusion in Petrinex started in January 2017 and are proceeding in phases. Implementation is also being phased for different IOGC jurisdictions (SK and AB) and functional areas.

The medium-longer term objective is that IOGC will receive all information required to calculate AB and SK IOGC royalties through Petrinex; and that Industry will no longer submit information (including estimates) manually or through the IOGC website. This objective will be realized once all necessary regulatory and system changes (Petrinex and IOGC systems) are completed. Given these interdependencies there will be a period of time, for some functional areas, where existing IOGC systems and processes will run concurrently (in parallel) with new Petrinex IOGC processes.

IOGC and Petrinex understand the importance of industry collaboration in this project. To that end a cross-section of IOGC producers and the Petrinex Industry team have been actively engaged throughout the design process. IOGC and the Petrinex team have and will continue to provide updates and resources by way of emails, communicate documents, Change Leader meetings, etc. to all IOGC operators.

There are a number of key factors that make the Petrinex IOGC Inclusion Project unique among other jurisdictional inclusion projects. These include the following:

- **Multiple Jurisdictions:** IOGC operates in multiple jurisdictions. The PIIP scope includes IOGC requirements for Alberta and Saskatchewan.
- **IOGC Changes:** PIIP is a large project for IOGC and for Petrinex, but much of the change relates to IOGC gaining access to data already reported through Petrinex by industry in compliance with the requirements of the Alberta Energy Regulator, the Alberta Department of Energy and the Saskatchewan Ministry Energy Resources. Accessing this data is a big change for IOGC; but no change

for Industry. The PIIP will lever off this data, and in doing so, eliminate duplicate reporting where possible.

- Industry Changes: PIIP does include some new reporting for Industry.

**Clarifying these new Industry requirements is the primary focus of this Handbook.**

## 1.2 About this Handbook

This Handbook is intended to be a focal point in helping your organization prepare for PIIP Go-Live. All individuals within your company who will be required to use Petrinex in the future for administrative or IOGC reporting purposes should review this Handbook.

We recognize that there is a wide range in experience levels between companies and individual users; from those who have extensive Petrinex knowledge through reporting in Alberta or Saskatchewan to those who have never used Petrinex before.

Unlike other Inclusion Project Industry Readiness Handbooks this Handbook will not focus on how to use existing Petrinex functionality. It will focus on unique net-new reporting for IOGC. There are many existing resources for available for users who are totally new to Petrinex. These are provided in Appendix 4.

It is recommended that all stakeholders engaged in IOGC reporting review sections 1 and 2 in this Handbook. These sections provide a synopsis of what is changing for IOGC reporting and recommended “Steps to Readiness”.

All of the other information in this Handbook is organized into Appendices as follows:

1. IOGC Communications
2. Changes from current IOGC reporting processes
3. Testing instructions
4. Information on Petrinex training resources
5. Frequently asked questions

This Handbook is an evolving document that will continue to be updated as new information becomes available. New releases will be published online to provide information on key activities such as Industry testing and training. IOGC Change Leaders will be notified when new releases are available. Key changes will be documented in the change log on page 2 of this document and changes from one release to the next will be highlighted in yellow in the document.












## 1.3 Scope and Timing of Changes Affecting Industry










The following table summarizes what is and what is not changing for IOGC reporting in Alberta and Saskatchewan.





- **Black Print: Information only. No Industry reporting change required.**
- **Red Print: Industry reporting change required.**

**IOGC INDUSTRY CHANGE SUMMARY vFinal (Updated December 20, 2022)**

(Black Print: Information only. No industry reporting change required. Red Print: Industry reporting changes were required.)

		Target Change Date (Calendar Quarters)	
<b>General</b>	<p><b>Data Submission:</b>                      -The medium-long term objective is that IOGC will receive all information required from Industry to calculate AB and SK IOGC royalties through Petrinex; and that industry will no longer submit information (including estimates) manually, upload or through the IOGC. This objective will be realized once all necessary regulatory and system changes (Petrinex &amp; IOGC) are completed. [Monthly Extract Petrinex to IOGC]. <b>HOWEVER: FOR ALBERTA INDUSTRY WILL HAVE TO CONTINUE TO SUBMIT TO PETRINEX AND TO IOGC UNTIL FURTHER NOTICE FROM INDIAN OIL AND GAS CANADA</b></p>	 SK July 2021  AB DEC 2022	
	<p><b>IOGC / Petrinex Communications:</b>  <b>1.3.1.1</b> -Companies will continue to pay IOGC royalties based on their estimates As an initial step, IOGC will provide its current assessments to BA’s through a new area in Petrinex similar to “Ministry Invoices and Statements” called “<b>IOGC Ministry Reports</b>” [under IOGC Reporting]</p>	 SK Jan 2022  AB DEC 2022	
	<p><b>Mineral Ownership (FN interest):</b>                      -Petrinex will use DOE and GoS ownership records to identify FN wells/facilities “of interest”. IOGC will rely on IOGC ownership records for the purposes of royalty calculation. For AB, and SK, Petrinex will have a “<b>First Nations Interest Discrepancy Report</b>” identifying DOE/GoS and IOGC “views” of ownership for reference. Alberta BAs will also be able to access FN ownership information through Query PE (online) and the PE Report AB: SK through Query RTA and the RTA Report (Federal Freehold Exempt and Federal 508).</p>	 AB Sept 2020  SK Q2 2019	
	<p><b>Compliance and other Process Changes:</b>                      -Historically the initial point of contact for IOGC associated with IOGC reporting has been the Royalty Tax Payer. Post implementation the initial point of contact will be the Operator.                      -In Saskatchewan IOGC will rely on SER compliance assurance processes associated with Oil Valuation. In Alberta IOGC will manage compliance assurance for Oil Valuation.                      -IOGC provisional assessment and penalty processes may be introduced by IOGC. Any such changes will be communicated at a future date.                      -EPAP is out of scope for this project. Change to existing Saskatchewan EOR reporting is out of scope.</p>		
	<p><b>Data Sources:</b> -Apart from any exception listed below, IOGC will source required data from Petrinex that Industry currently reports through Petrinex to AER/DOE and GoS.</p>		
	<b>SK Only</b>	<b>AB Only</b>	
<b>Infrastructure</b>	-No change from current SK reporting.	-No change from current AB reporting.	
<b>Volumetrics</b>	-No change from current SK reporting.	-No change from current AB reporting.	
<b>Allocations</b>	-Currently there are 2 operators that will report gas allocations on specific properties where royalties are calculated on sales (vs. Production). Allocations for royalty purposes are not required from operators of leases where royalties are based on production.	-Gas sales allocations already exist in AB and IOGC will use the SAF data by wells/units of interest.	 SK-Q4 2017
<b>Royalty Tax Payer</b>	-No change from existing SK process. Operators use this functionality to identify parties (RTPs) responsible for paying royalty on FN production.	--Royalty Tax Payer functionality, a modification of the SK process, will be introduced in AB for operators to identify RTPs for production/sales on FN interest land.	 AB Aug 2020

<b>Pipeline Splits</b>	-No change from existing SK process. Pipeline Splits will be used to identify (and auto-populate) the Royalty Tax Payers (RTPs) and Purchasers responsible for reporting sales price and purchase price in the OV-RTP and OV-Purchaser processes.	-Not applicable in AB for IOGC purposes.	
<b>Oil Valuation-Royalty Tax Payer</b>	-No change from existing SK process. IOGC RTPs will report prices on volumes to be valued identified in Pipeline Splits.	-The oil volume to be valued will be autopopulated based on volumes from Volumetrics and RTPs from RTP functionality. In OV-RTP the RTP will identify purchasers and the price received for their oil. This is a modification of the OV-RTP Saskatchewan functionality.	 AB Nov 2020
	<b>SK Only</b>	<b>AB Only</b>	<b>Target Change Date (Calendar Quarters)</b>
<b>Oil Valuation-Purchaser</b>	-No change from existing SK process. IOGC Purchasers will report purchase prices on volumes identified from pipeline splits for arm’s length transactions. IOGC will be able to run a query to identify outstanding discrepancies.	-Purchasers identified in the OV-RTP functionality will report prices paid in a process similar to OV-Purchaser in SK.	 AB Nov 2020
<b>EVAP</b>	- No change from existing SK process. IOGC will rely on GoS EVAP audit processes for non-arms-length transactions	-EVAP is not applicable in Alberta	
<b>Product Pricing</b>	-Where leases require valuation to be determined on actual sales (vs. index) a new screen/process will be used for the RTP to enter prices received for Gas/C5-SP/Cond, NGLs and Sulphur (if applicable).	-Where leases require valuation to be determined on actual sales (vs. index) a new screen/process will be used for the RTP to enter prices received for Gas/C5-SP/Cond, NGLs and Sulphur (if applicable).	SK – Aug 2020  AB – Nov 2020 
<b>GCA</b>	-New functionality will be developed in Petrinex for IOGC-specific GCA reporting where lease agreements provide for deductions for Gas Cost Allowance.	-New functionality will be developed in Petrinex for IOGC-specific GCA reporting where lease agreements provide for deductions for Gas Cost Allowance.	SK – Feb 2019  AB – Feb 2019 
<b>Non-Compliance Reports</b>	-Industry will rely on non-compliance reports used in SK for existing functionality. New non-compliance/missing processes/reports will be developed for (and delivered concurrently with) new IOGC functionality: ▪ Product Pricing – (sweeps and on-demand)	-Industry will rely on non-compliance reports used in AB for existing functionality. New non-compliance/missing processes/reports will be developed for (and delivered concurrently with) new IOGC functionality: ▪ Product Pricing, RTP, Oil Valuation – (sweeps and on-demand )	

<p><b>Production Allocation Discrepancy (PAD) Report</b></p>	<p>SK -There is no PAD report for Saskatchewan.</p>	<p>-AB- The PAD report is a tool used to compare gas production volumes reported at the wellhead to gas and product(s) allocations reported at the stream (well or unit) level. The report is used to ensure that Crown royalties have been assessed correctly and that field operations/reporting is within corporate tolerances. Combined allocation volumes of the gas and liquids should theoretically always be less than or equal to the wellhead gas production. If allocations are greater than the production from the stream; or if allocations are significantly less than production, it is likely that an error has been made in the allocation/reporting process.</p> <p>-In Alberta for Crown Royalty purposes, the monthly auto-created PAD report flags any discrepancy outside the pre-established Alberta Energy tolerance threshold of +/-20%. Royalties are automatically recalculated if the discrepancy is not fixed within an established time frame. Industry has access to an Industry version of the PAD report that can be run On-Demand, in which the tolerance threshold is set by requester as a report variable.</p> <p>-IOGC now has access to the Industry version of the PAD report for AB and will use the report for audit purposes to identify production - allocation discrepancies associated with First Nations “of interest” production. Industry also has the option to use the “identifier list builder” on the PAD report to specifically select FN “of interest” properties.</p>	<p> AB – Jul 2019</p>
<p><b>Working Interest Owner Report</b></p>	<p>The royalty tax payer volume will be calculated using the sum of “Freehold Fed Exempt” and “Freehold Fed 508 Exempt” RTP Percent set up for the Stream in the Royalty Tax Payer and Stream level volume.</p>	<p><b>ALBERTA</b> the royalty tax payer volume will be calculated using the sum of “First Nations Interest” RTP Percent set up for the Stream in the Royalty Tax Payer and Stream level volume for Alberta</p>	<p> SK July 2021  AB Dec 2022</p>
<p><b>Alberta Modernized Royalty Framework [MRF]</b></p>	<p>SK – no MRF as MRF is ALBERTA only</p>	<p>IOGC has Alberta wells of interest to IOGC subject to MRF methodologies. The existing IOGC RIMS2 (Resource Information Management 2) project did not include provisions for MRF in its scope as MRF did not exist at that time. IOGC is required to calculate royalties for these and future MRF wells, but does not currently have this capability, nor all the data required for the calculation.</p>	<p> AB April 2022</p>



## 1.4 Readiness Activities and Resources

### a. Data Conversion

Data conversion will be happening throughout the design and development phases of this project. The vast majority of data conversion will come from government systems; however, there are a couple of items that may require Industry verification:

**A process will be developed and communicated with Change Leaders to collect and reconcile this information.**

### b. Testing

Online Testing: IOGC and Industry Team are/will be engaged in testing all online testing of new IOGC functionality.

Industry Interoperability Testing:

- Spreadsheet uploads (CSV) - Some of the new IOGC functionality allows for Industry to input data via spreadsheet uploads. Change Leaders will be informed of the windows that will be made available for testing the upload process prior to go-live. The following new areas of new Petrinex IOGC functionality allow for spreadsheet uploads and will be have a “testing window” are:
  - SK Gas Allocations
  - AB/SK Product Pricing
  - AB/SK IOGC GCA
  - AB Oil Valuation Royalty Tax Payer
  - AB Oil Valuation Purchaser
- Vendor system testing (XML) – Petrinex is not currently aware of new vendor system functionality being built for new IOGC functionality. If you are a vendor or use a vendor system where new IOGC functionality is being developed, please contact Sharon.Rudyk@gov.ab.ca

More information on Industry Interoperability Testing can be found in **Appendix 3: Testing Instructions**.

### c. Training

Several training resources will be made available to help users become familiar with new Petrinex IOGC functionality. Modules and/or Job Aids and/or Tips will be prepared for the following new IOGC functional areas:

- SK Gas Allocations
- AB/SK Product Pricing
- AB/SK IOGC GCA
- AB Royalty Tax Payer
- AB Oil Valuation Royalty Tax Payer
- AB Oil Valuation Purchaser

More information on training resources for existing and new Petrinex functionality can be found in **Appendix 4: Information on Petrinex Training**.

### d. Industry Support and Change Leader Program

The Petrinex Industry Manager and his team of subject matter experts represent Industry's interests at Petrinex and contribute Industry expertise to Petrinex operations and management. The Industry Petrinex Team [IRT] is funded by the oil and gas industry and is responsible for ensuring that IOGC industry operators are aware and fully prepared for this change.

To ensure that we are positioned to communicate with the correct individual in your company, if you have not already done so, please provide us with the name, telephone number and e-mail address of a prime contact (a Petrinex "*Change Leader*") for your company for this Petrinex IOGC Inclusion Project. If you currently have operations in Alberta and/or Saskatchewan and wish to have your existing *Change Leader* be the prime Petrinex contact for the PIIP, please let us know.

To register your *Change Leader* please contact the Petrinex Service Desk at 403-297-6111 in Calgary or 1-800-992-1144 toll free outside of Calgary; or e-mail your *Change Leader* contact information to us at [petrinexsupport@petrinex.ca](mailto:petrinexsupport@petrinex.ca)

Industry readiness activities will be ongoing throughout the project. Examples of readiness activities include but are not limited to:

- Change Leader and Software Vendor Meetings
- Providing communications and materials intended to clarify or provide instructions in regards to reporting changes and Petrinex processes.
- Company readiness scorecard tracking.

## 1.5 Key Contact Information

For questions with regard **IOGC changes** please contact **Sylvia Taylor**, RIMS2 Project Manager, IOGC 403-819-9902, [Sylvia.taylor@canada.ca](mailto:Sylvia.taylor@canada.ca)

For **Industry questions** relating to **PIIP & Petrinex**, contact **Sharon Rudyk**, Industry Coordinator, Petrinex 403-297-3313, [sharon.rudyk@gov.ab.ca](mailto:sharon.rudyk@gov.ab.ca)

For questions relating to **Petrinex Industry Policy**, contact Steve Freeman, Industry Manager, Petrinex 403-297-2311, [steve.freeman@gov.ab.ca](mailto:steve.freeman@gov.ab.ca)

## 2.0 PIIP Steps to Readiness

PIIP implementation will introduce changes for both IOGC and Industry. All companies are strongly encouraged to follow the outlined “PIIP Steps to Readiness” to ensure that they are ready for the move from the current reporting processes to Petrinex.

<b>Steps to Readiness</b>
2.1 Identify and Register a Change Leader for your Company
2.2 Understand the impacts of PIIP on your Company
2.3 Have a Plan to respond to New Changes
2.4 Prepare your Systems
2.5 Ensure your staff members are trained
2.6 Implement required Pre-Go-Live activities
2.7 Go-Live and get the benefits

### Detailed Steps to Readiness

#### 2.1 Identify and Register a Change Leader for you Company

The *Change Leader* Program is a central readiness and communications strategy for PIIP. Every company should register a Change Leader to ensure that they receive all important information related to new business processes and reporting requirement changes.

The *Change Leader* has two primary roles:

**a) Be the Primary Point of Contact with Petrinex**

- Pass on information received from Petrinex to the appropriate parties in your company, and ensure that the information is understood.
- Attend all *Change Leader* meetings scheduled by the PIIP team. All *Change Leader’s* will be notified with dates and venues for *Change Leader* meetings as they are scheduled.

**b) Be the Leader for PIIP Implementation**

- Develop a PIIP implementation plan for your company. Track and report progress against that plan and make adjustments as appropriate.
- Be the “go-to” person in terms of understanding what PIIP is all about and how it will impact your company.
- Ensure all of the “Steps to Readiness” are implemented efficiently, effectively and on a timely basis at your company.

#### 2.2 Understand the impacts of PIIP on your Company

PIIP will impact different companies and stakeholder groups in different ways. Once you have identified which stakeholder group your company belongs to, carefully review Table 1.3a “Table of IOGC Reporting Changes Affecting Industry” to understand the impacts of PIIP implementation. The following are the identified stakeholder groups:

**a. Oil & Gas Operating Producers**

These companies operate wells, batteries, gathering systems or other oil and gas facilities. These companies have responsibility for reporting in Petrinex using a number of the Petrinex functional areas. Oil and Gas Operating Producers should carefully review Section 1.3 and Appendix 2 in this Handbook to identify changes applicable to them in the provinces in which they have operations.

**b. Royalty Tax Payers**

Royalty Tax Payers (RTPs) are companies that are responsible for paying royalties to IOGC. Most of the time the Oil and Gas Operating Producer is also the Royalty Tax Payer. RTPs are responsible for reporting the price received for oil and product pricing (“Oil Valuation – RTP”).

**c. Purchasers of Oil**

Purchasers of oil are responsible for reporting through Petrinex the price paid for oil. The only Petrinex functionality applicable to this group is “Oil Valuation - Purchaser”.

**d. Production Accounting Service Providers (PASPs)**

PASPs are professionals that operate under contract to perform specific services for their clients. PASPs are advised to fully understand all changes being introduced with PIIP as assess what changes are applicable for each of their clients.

**e. Production Accounting Software Providers**

These companies are third party software providers to oil & gas producers who may have to alter or design their product to accommodate new reporting requirements.

## **2.3 Have a Plan to respond to New Changes**

A company’s plan to manage change may vary in detail and scope depending on the size and the number of operated properties and on the stakeholder group(s) to which they belong. Each company is strongly encouraged to have a plan in place that will assess the impact of change on its business, outline steps to implement any needed changes, and track progress against the plan.

## **2.4 Prepare your Systems**

**a) Minimum Computer Specifications**

Devices used to access Petrinex must meet certain minimum specifications, as well as to access the online training modules. Contact Sharon.rudyk@gov.ab.ca if you need these specifications.

**b) System Interfaces**

Companies may have a variety of systems that will need to interface with Petrinex including:

- Third Party Production Accounting – Petrinex is working with production accounting and software providers that currently interface with Petrinex in other jurisdictions. Petrinex will be providing the specifications necessary to interface with Petrinex. Each company is encouraged to discuss PIIP with their software providers to ensure they are preparing for Petrinex reporting.

- Internally Developed Applications – If you have internally developed production accounting systems (other than simple spreadsheets) and require documentation with Petrinex specifications, please contact Sheryl Moody, 403-297-5575, [sheryl.moody@gov.ab.ca](mailto:sheryl.moody@gov.ab.ca).
- Internally Developed Spreadsheets – Petrinex has the ability to efficiently upload information from CSV spreadsheet files using batch upload functionality. Specific instructions on mapping and formatting internal spreadsheets for upload to Petrinex are available on the [Petrinex Website – Learning Centre – Learning Job Aids – Spreadsheet CSV Upload Specification and Templates – IOGC cost Allowance](#)
- Third Party Marketing/Pricing Software – Modifications to these systems may also be required. You are encouraged to discuss this with your software providers as required.

### c) Test your Upload Files

Petrinex has a comprehensive plan for testing uploads for all applicable functionality. All interested companies and software providers will have the opportunity to have samples of various CSV upload files run in the Petrinex test system.

Interested parties will create these sample upload files and email them to Petrinex. The files will be uploaded into the test system by a Petrinex staff member. The results will be evaluated and feedback will be returned. This allows a company to ensure that they understand what information is required and that files are formatted properly.

Additional information regarding testing, including the upload templates, will be provided closer to planned testing period. Please see **Appendix 3: Testing Instructions** for more information.

## 2.5 Ensure your staff members are trained

### a) Identify the Petrinex users in your company

A company (Business Associate) determines how many users are required depending on its size and complexity. Petrinex requires that a Business Associate have at least two user accounts, and it is strongly recommended that you have least three user accounts. Specifically:

- Primary User Security Administrator (USA): Every Business Associate (BA) using Petrinex must have a Primary USA. The USA is responsible for managing user accounts including account creation and deactivation. The USA also creates User Security Roles and assigns these roles to the appropriate users within the company. User Security Roles define which functions a user can perform in Petrinex.
- Backup User Security Administrator: It is strongly recommended that each BA have a Backup USA with authority to perform the functions of the Primary USA should that individual not be available.
- Users: The Primary and Backup USA roles cannot perform any functions in Petrinex other than setting up user security roles and granting specific access to users. As such, at least one other user must be created to carry out the company's required reporting activities in Petrinex.

Instructions for setting up your USA will be communicated to Change Leaders as the implementation date gets closer. Similarly, training information will be provided to USA's on how to set up users, including how to specify the tasks each user is permitted to perform in Petrinex, as required.

## b) Petrinex Learning Resources

Petrinex uses a number of approaches to help BAs ensure their users are fully trained in Petrinex functionality. Here are some of the Learning Resources that will be available for the PIIP project:

- PIIP Industry Readiness Handbook  
This Handbook is an evolving document which will be continually updated as Go-Live approaches. It is meant to provide useful information and tips to assist Industry with the transition to Petrinex. Anyone identified as a future Petrinex user at your company is encouraged to keep current with the most recent updates to this guide as they become available.
- Change Leader Meetings: Change Leader meetings will be scheduled over the life of the PIIP project. Change Leaders are a key focal point for Petrinex communications. The primary purpose of these meetings is to keep Change Leaders aware of ongoing project and implementation changes, demonstrate Petrinex IOGC functionality, and provide a forum for having your questions answered. Change Leaders should communicate information shared in these meetings with the appropriate users in their companies.
- Learning Modules  
All Petrinex functionality has associated web-based learning modules available on the Petrinex website under the Learning Centre. Existing Learning modules have been updated with IOGC content and new modules have been created for new functionality developed exclusively for IOGC. More information on learning support is provided in **Appendix 4**.
- Tips and Job Aids  
Change Leaders will be alerted to new Tips and Job Aids posted to the Petrinex website in the coming months.

Job Aids are created to provide examples, templates, shortcuts, and other information that make using certain functions within Petrinex easier and more efficient.

Tips are communications intended to provide up-to-the-minute information and updates dealing with a variety of Petrinex issues.

- Online Help  
Online help screens are available for Petrinex Indian Oil and Gas functionality. While logged into Petrinex, a user can access Online Help on any page by clicking on the Help symbol. Online Help is context sensitive and provides step-by-step “how to” information as well as related background information relating to the page.
- Petrinex Website Initiatives Page  
All Change Leaders and future Petrinex users can access many of the resources listed above and more on the Petrinex website under Initiatives under the Petrinex IOGC Inclusion Project (follow the link below): <https://www.petrinex.ca/Initiatives/Pages/IndianOG.aspx>  
Examples of what can be found on this page include:
  - The most recent update of the PIIP Industry Readiness Handbook
  - Updates and links related to Training, Tips and Job Aids
  - Materials presented at Change Leader meetings
  - Announcements/New Releases related to this project

## 2.6 Implement required Pre-Go-Live activities

As the PIIP timeline moves forward, Petrinex will communicate specific activities that should be performed prior to the go-live date. These activities will be communicated to Change Leaders well in advance. One very specific activity is:

### Primary USA Identification

- Business Associates will need to identify their Primary USA prior to Go-Live. Those who already have a Primary USA for other Petrinex jurisdictions may choose to use the same person for IOGC as well.

Upon Go-Live, the Primary USA must create any required User IDs and assign User Security Roles before anyone will be able to commence reporting on Petrinex.

### Other activities as identified during the project

Any additional pre-go-live requirements will be communicated to Change Leaders and documented in the IOGC Initiatives Page.

## 2.7 Go-Live and get the benefits

Petrinex has provided significant benefits to users in Alberta and Saskatchewan for many years. These benefits are now extending to IOGC users. It is important, especially during the early months after implementation, to monitor how Petrinex processes are working for your company and to investigate any issues that may arise that could detract from the benefits expected from the project. It is also important that your users are aware of and make full use of the various tools and reports provided through Petrinex to help them do their work efficiently and effectively.

The Petrinex Business Desk is an important resource for Petrinex users. The Business Desk serves as the single point-of-contact for queries related to the business functionality and operations of Petrinex. It supports both Industry and Ministry users by providing telephone and email support and providing management, coordination, analysis and response to user queries.

## Appendix 1: IOGC Communications

This appendix is reserved for IOGC communications relevant to this project.

[IOGC Information Letter: Updates and links to new and pertinent information](#) (published July 2, 2020)

[IOGC Progress letter on the Provincial Liability Reduction Programs](#) Dated July 22, 2021

[IOGC Information Letter – Filing of 2021 Actual and 2022 Estimated Gas Cost Allowance Applications](#)



## **Appendix 2: Overview of IOGC GCA Management in Petrinex v2.1**

Updates from V2.0 are in Red (updated January 18, 2022)

Please review the document published on the Petrinex Website – Initiatives – Petrinex Indian Oil and Gas Canada Inclusion Project - Petrinex Information Bulletin: Overview of IOGC GCA Management in Petrinex [\(CLICK HERE\)](#)

## Appendix 3: Testing Instructions

### Industry Interoperability Testing Scope

Industry Interoperability Testing (IIO) provides BAs the opportunity to submit batch files to the Petrinex Industry Team for the purpose of testing:

- Files generated by the BA's production accounting software (in XML or CSV format)
- Spreadsheets developed for uploading data to Petrinex (in CSV format).

**Note:** Industry will not be engaged in testing Petrinex online functionality; this will be performed by the Petrinex Industry Team.

Each BA will have to assess how much, if any IIO testing they will conduct. The Petrinex Industry Team anticipates that:

- A number of companies will submit IIO test files for each of the major PA systems.
- At least one company will submit IIO files for every PA system that will interface with Petrinex.
- All companies developing internal software with interfaces to Petrinex will test their software.
- Most companies preparing CSV spreadsheets for upload to Petrinex will want to test this capability.

### IIO Testing "Window"

This section will be updated with the dates that the interoperability testing window will be open when they have been determined. Links will also be posted to job aids that provide:

- Instructions for creating/formatting upload submission files.
- Submission templates.

### IIO Testing Procedures

IIO test files can be submitted in either CSV or XML. Each test file submission along with the IIO transmittal form is to be emailed to [petrinexsupportg@petrinex.ca](mailto:petrinexsupportg@petrinex.ca) with **IOGC Inclusion Project in the Subject Line**. If the transmittal form is incomplete or not included the batch submission will not be processed. The file will be sent back to the BA with a request for the additional required information. The transmittal form has been embedded as a Word Document at the bottom of this appendix.

The target timeframe for the initial processing of a file is 3 business days, however, it may take longer depending on the volume of activity and the amount of data preparation required.

After the batch is processed the BA will be sent an e-mail with:

- The processing results
- A detailed explanation of any problems encountered
- Recommendations, as appropriate on what was needed to successfully process the file

## PIIP Industry Readiness Handbook

The e-mail will include attachments, as appropriate, including the transmittal form with completed actual test results section and any Petrinex generated additional outputs or validation results.

If you have any questions related to IIO testing, please contact Sharon Rudyk at 403-297-3313 or email [sharon.rudyk@gov.ab.ca](mailto:sharon.rudyk@gov.ab.ca).



IIO Transmittal  
Form.docx

## Appendix 4: Information on Petrinex Learning Resources

As mentioned in Step 2.0 of the PIIP Steps to Readiness, the Petrinex Team uses a number of approaches to help companies ensure their users are fully trained in how to use Petrinex. These include:

- **Change Leader Meetings:** A number of Change Leader meetings will be scheduled over the life of the PIIP project at different locations. Dates, times, and venues will be communicated when these details are available.
- **Petrinex Learning Centre:** The following learning resources are accessed through the public Petrinex website at <http://www.petrinex.ca/>
  - **Online Learning Modules:** Learning modules provide information and “hands-on” instruction for all aspects of Petrinex, from general overview to the specifics of each function. Modules include test questions and practice in a simulated environment that has the same look and feel of Petrinex. By completing exercises within the module, learners are evaluated in terms of their understanding of the function.

Changes to existing modules along with several new training modules have been released to help users understand using Petrinex functionality for IOGC.

- **Job Aids:** Job Aids are compiled to provide examples, templates, shortcuts, tips and information that make using Petrinex easier and more efficient. Unlike the Training Modules, Job Aids do not include learner evaluation.
- **Tips & Alerts:** These communication vehicles provide up-to-the-minute information and instruction for dealing with a variety of Petrinex user issues. Tips and Alerts are catalogued for quick and easy reference. Tips and Alerts can be accessed through the Petrinex website and are also available on the Petrinex Training System in the individual user training profiles.
- **Online Help:** After logging in, a user can access the Online Help related to any Petrinex page by clicking on the HELP symbol. Petrinex Online Help is context sensitive and provides step-by-step “how to” information as well as related background and tips for that page. The following learning modules have been released to the Petrinex Learning Management System and are available for enrolment. Users who currently have the “Industry Curriculum” of courses in their profile will find these new courses under Allowable Costs.
  - Module 7.13 Manage IOGC GCA Submissions
  - Module 7.14 Manage IOGC GCA Reports and Queries
  - Module 5.20 Manage Pricing Submissions (SK only)
  - Module 5.21 Manage Pricing Reports (SK only)
  - Module 6.13 Manage Royalty Tax Payer Submissions (AB only)
  - Module 6.14 Manage Royalty Tax Payer Reports (AB only)

## **Appendix 5: Frequently Asked Questions**

A number of frequently asked questions have been addressed in Appendix 2 Overview of IOGC GCA Management in Petrinex (Attachment 2 – Miscellaneous Tips, Reminders and Important Items to Note.)

Please review the document published on the Petrinex Website – Initiatives – Petrinex Indian Oil and Gas Canada Inclusion Project - Petrinex Information Bulletin: Overview of IOGC GCA Management in Petrinex (updated January 18, 2022) [\(CLICK HERE\)](#)