Learning Aid:

Infrastructure Spreadsheet Upload Specifications

Updated July 28, 2017

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Reference Materials

This Learning Aid is intended as a supplement to the Resource Centre Online Training Modules. The following training modules will provide you with additional information on Petrinex reporting practices related to this functionality:

- 6.06 – Manage Facility Operator Changes
- 6.09 – Manage Well to Facility Link
- 6.12 – Manage Royalty/Tax Payer (SK)

Introduction

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

- **Online**: Petrinex online pages allow you to enter data that is reported to Petrinex.
- **Batch upload**: 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. You can only upload data created within a spreadsheet if that data is saved as a CSV (Comma Separated Values) file.

You may upload infrastructure data in spreadsheets for the following work processes:

- **SK Royalty Tax Payer (Add and change)** – Well, unit and injection facility operators submit information related to the business associates that are responsible for payment of royalty/tax. This information will be used by ECON in the calculation of oil and gas royalties and production taxes.

- **AB Facility Operator Changes** – The current facility operator can make an Operator change request for the current or a future production month.

- **SK Facility and Well Operator Changes**– The current facility and/or well operator can make an Operator change request for the current or a future production month.

- **Well to Facility Link Change** – The current facility operator can make a well to facility link change for the current reporting month. **(Effective April 6, 2017)**

- **Retro-active Well to Facility Link Change -** The current facility operator can make a Retro-active change for a prior production month.

Note: Petrinex will not accept Infrastructure uploads of data created in spreadsheets for work processes other than those listed above.

Each Infrastructure spreadsheet upload is considered a full-facility replacement for the applicable date.

Create and Save Data within a Spreadsheet

You must follow specific rules to create and save data in a spreadsheet for uploading 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 in any other format. You may create spreadsheets using 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 → Training Job Aids
   b. Click the Job Aid entitled Saskatchewan Spreadsheet Upload Templates

Step 2. There is a separate template for each work process. Create a new worksheet from the appropriate 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 (volumetrics, allocations, pipeline splits, waste plant submission, valuation or royalty/tax payer, etc.) per worksheet, but you may include multiple facilities 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 (volumetrics, allocations, or pipeline splits, waste plant, etc.).

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.
   • More than one facility may be included in this worksheet.
   • Follow the worksheet format that is included in this document to ensure all columns are completed as required.

- A data element (cell) that is not required on any particular row may be left blank (other than row 1).

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 a CSV format.

Step 5. Save your new worksheet. You may only save the worksheet in a CSV format for uploading 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.

       a. On the File menu, select **Save As**
       b. Type the file name that you want to use
       c. Select the .CSV file type
       d. Click **Save**. The following message appears.
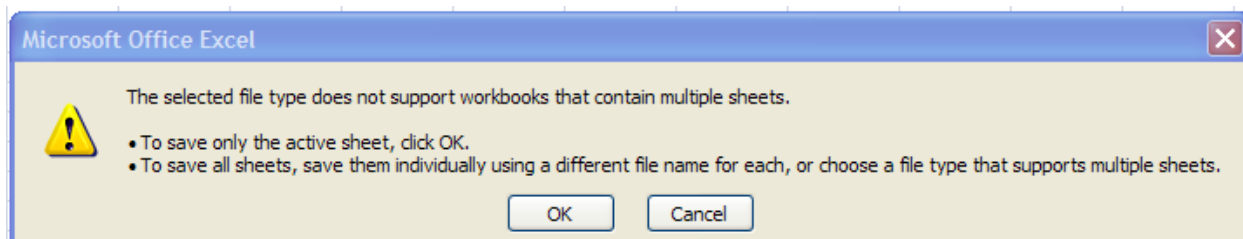

       e. Click **OK** to save your active worksheet.

If you were to open this worksheet at this point, you will lose all of the preceeding 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.

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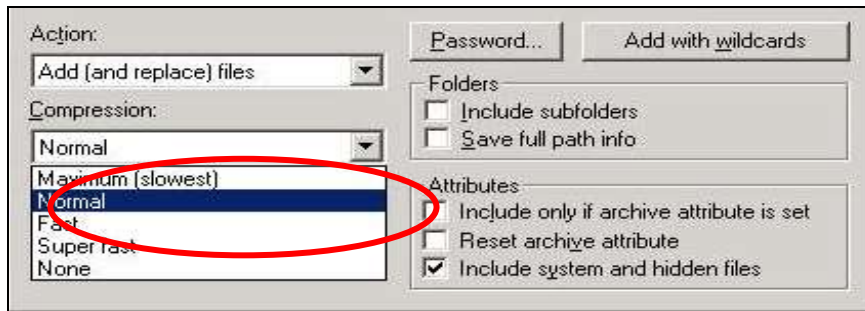
Note: only one file can be included in a zipped file.

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 → 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.

New Royalty Tax Payer Record

Spreadsheet Column	Column Header	Example Field Content	Format	Required on each row? Y/N	Comment
A	Verb	ADD		Y	ADD is the only valid verb
B	Noun	RTP		Y	RTP is the only valid noun
C	Revision	002	(prefix with 0's)	Y	Current is 002
D	RTP Identifier Province	SK	2 chars	Y	SK Only
E	RTP Identifier Type	WI	2 chars	Y	WI, IF, or UNIT are the only valid types
F	RTP Identifier	100030604727W300	max 16 digits (prefix with 0's)	Y	5 digits for units, 7 digits for facilities and 16 for a well id.
G	Product	GAS	max 3 chars	Y	valid products GAS or OIL only
H	Start Date	2012-03	YYYY-MM	Y	• Month when RTP information becomes effective. • Dash is mandatory
I	End Date	2012-05	YYYY-MM	Y	• RTP information is effective up to and including this production period. • Dash is mandatory • If there is no end date, use 9999-12
J	Operator ID	12345	max 5 char (prefix with 0's)	Y	Must be a valid BA ID
K	Royalty Tax Payer ID	12345	max 5 char (prefix with 0's	Y	Must be a valid BA ID
L	Mineral Ownership Type	CROWN	max 12 Chars	Y	Valid Ownership Types are • CROWN • CROWNSSB • FREEHOLD • FH508EXEMPT • FHFEDEXEMPT • FHWIOEXEMPT
M	RTP Percent	100.00000	8 digits (5 decimal)	See comment	There must be a minimum of one RTP line. RTP must be blank if there is a WIO %
N	WIO Percent	100.00000	8 digits (5 decimal)	See Comment	WIO must be blank if there is a RTP %

Note: When submitting multiple RTP identifiers, must sort by Identifier Type (column E) then RTP Identifier (Column F)

Change an Existing Royalty Tax Payer Record

Spreadsheet Column	Column Header	Example Field Content	Format	Required on each row? Y/N	Comment
A	Verb	CHANGE		Y	CHANGE is the only valid verb
B	Noun	RTP		Y	RTP is the only valid noun
C	Revision	002	(prefix with 0's)	Y	Current is 002
D	RTP Identifier Province	SK	2 chars	Y	SK Only
E	RTP Identifier Type	UN	2 chars	Y	WI, IF, or UNIT are the only valid types
F	RTP Identifier	U9107	max 16 chars (prefix with 0's)	Y	5 digits for units, 7 digits for facilities and 16 for a well id.
G	Product	OIL	max 3 chars	Y	valid products GAS or OIL only
H	Start Date	2012-03	YYYY-MM	Y	• Month when RTP information becomes effective. • Dash is mandatory
I	End Date	2012-05	YYYY-MM	Y	• RTP information is effective up to and including this production period. • Dash is mandatory • If not end date, use 9999-12
J	Operator ID	12345	max 5 char (prefix with 0's)	Y	Must be a valid BA ID
K	Royalty Tax Payer ID	12345	max 5 char (prefix with 0's)	Y	Must be a valid BA ID
L	Mineral Ownership Type	CROWN	max 12 Chars	Y	Valid Ownership Types are • CROWN • CROWNSSB • FREEHOLD • FH508EXEMPT • FHFEDEXEMPT • FHWIOEXEMPT
M	RTP Percent	100.00000	8 digits (5 decimal)	See comment	There must be a minimum of one RTP line. RTP must be blank if there is a WIO %
N	WIO Percent	100.00000	8 digits (5 decimal)	See Comment	Cannot be blank unless there is a RTP Percent

Note: When submitting multiple RTP identifiers, must sort by Identifier Type (column E) then RTP Identifier (Column F)

AB – Request Facility Operator Change

Spreadsheet Column	Column Header	Example Field Content	Format	Required on each row? Y/N	Comment
A	Verb	CHANGE		Y	CHANGE is the only valid verb
B	Noun	FACOPERATR		Y	FACOPERATR is the only valid noun
C	Revision	002	(prefix with 0's)	Y	Current is 002
D	Current Operator ID	ABCD	4 chars	Y	Must be a valid Alberta BA ID
E	Start Date	2016-07	YYYY-MM	Y	• Month when Operator change is effective. • Dash is mandatory • Cannot be a prior period
F	New Operator ID	1234	max 4 char(prefix with 0's)	Y	Must be a valid Alberta BA ID
G	Prior Amendments OK	Y or N	1 char	Y	Y if new operator has authority to make prior period volumetric amendments
H	Facility Prov State	AB	2 chars	Y	Must be AB
I	Facility Type	BT	2 chars	Y	• Must be a valid AB facility type i.e. BT, GS, GP, IF etc. (see appendix A) • Cannot be a WI
J	Facility Identifier	1234567	7 digits	Y	
K	Requestor Comments	Comments from Requestor		N	Can be blank, however if added must be on first row.

SK – Request Facility Operator Change

Spreadsheet Column	Column Header	Example Field Content	Format	Required on each row? Y/N	Comment
A	Verb	CHANGE		Y	CHANGE is the only valid verb
B	Noun	FACOPERATR		Y	FACOPERATR is the only valid noun
C	Revision	002	(prefix with 0's)	Y	Current is 002
D	Current Operator ID	ABCDE	5 chars	Y	Must be a valid Saskatchewan BA ID
E	Start Date	2016-07	YYYY-MM	Y	• Month when Operator change is effective. • Dash is mandatory • Cannot be a prior period
F	New Operator ID	12345	max 5 char (prefix with 0's)	Y	Must be a valid SK BA ID
G	Prior Amendments OK	Y or N	1 char	Y	Y if new operator has authority to make prior period volumetric amendments
H	RTP Prior Amendments OK	Y or N	1 char	Y	Y if new operator has authority to make prior period RTP amendments
I	Facility Prov State	SK	2 chars	Y	Must be a valid Saskatchewan BA ID
J	Facility Type	BT	2 chars	Y	The facility type i.e. BT, GS, GP, IF etc. (see appendix A) or a Well (WI) or Unit Identifier (U)
K	Facility Identifier	1234567	max 16 digits (prefix with 0's)	Y	5 digits for units, 7 digits for facilities and 16 for a well id
L	Requestor Comments	Comments from Requestor		N	Can be blank, however if included must be on first row.

Note: To ensure optimization of your operator changes, It is recommended to make your WI (Well) Operator Changes in a separate file from your Facility Operator Changes and keep your file to a maximum of 200 rows per file.

Well to Facility Link Change – effective April 6, 2017

Spreadsheet Column	Column Header	Example Field Content	Format	Required on each row? Y/N	Comment
A	Verb	CHANGE		Y	CHANGE is the only valid verb
B	Noun	WELLTOFAC		Y	WELLTOFAC is the only valid noun
C	Revision	001	(prefix with 0's)	Y	Current is 001
D	CurrentFac Prov	SK	2 chars	Y	Must be AB or SK
E	CurrentFacType	BT	2 chars	Y	Must be valid facility type ie: BT, IF
F	CurrentFacID	1234567	max 7 char(prefix with 0's)	Y	Must be a valid Facility ID
G	NewFacProv	SK	2 chars	Y	Must be AB or SK
H	NewFacType	BT	2 chars	Y	Must be valid facility type ie: BT, IF
I	NewFacID	1234567	max 7 char(prefix with 0's)	Y	Must be a valid Facility ID
J	Start date	2017-02-15	YYYY-MM-DD	Y	Must be a valid date Dashes are mandatory
K	WellProv	SK	2 chars	Y	Must be AB or SK
L	WellType	WI	2 chars)	Y	Must be WI
M	WellID	10001020030405W6	max 16 char	Y	Must be a valid Well ID

Retroactive Well to Facility Link Change

Spreadsheet Column	Column Header	Example Field Content	Format	Required on each row? Y/N	Comment
A	Verb	CHANGE		Y	CHANGE is the only valid verb
B	Noun	RETWELLTOFACH		Y	RETWELLTOFACH is the only valid noun
C	Revision	001	(prefix with 0's)	Y	Current is 001
D	Well Province State	AB	2 char	Y	AB or SK
E	Well Type	WI	2 char	Y	Must be WI
F	Well Identifier	100021506105W400	max 16 char	Y	Must be a valid Well ID
G	Facility Province State	AB	2 char	Y	AB or SK
H	Facility Type	BT	2 char	Y	Must be valid facility type ie: BT, IF
I	Facility Identifier	1234567	max 7 char(prefix with 0's)	Y	Must be valid facility ID
J	Start Date	2016-01-30	YYYY-MM-DD		Dashes are mandatory

Appendix A
AB Facility Codes

Facility Code	Description
BT	Battery
CS	Compressor Station
CT	Custom Treating Facility
GP	Gas Plant
GS	Gas Gathering System
IF	Injection/Disposal Facility
MS	Metering Station
OS	Oil Sands Processing Plant
PL	Pipeline
RF	Refinery
TM	Terminal
WP	Waste Plant
WS	Water Source

SK Facility Codes

Facility Code	Description
BT	Battery
CS	Compressor Station
CT	Custom Treating Facility
GP	Gas Plant
GS	Gas Gathering System
IF	Injection/Disposal Facility
MS	Metering Station
PL	Pipeline
RF	Refinery
SA	Oil Satellite
TM	Terminal
WP	Waste Plant
WS	Surface Water Source
WT	Fresh/Formation Water Source