Oil & Gas Authority

OGA Stewardship Survey

Survey User Guide

October 2017

Contents

This guide is split into two sections, your role when using the Stewardship Survey will define which section will be of use to you:

1. **SPA's (Single Points of Accountability)** – provides help and guidance on tasks specifically related to the SPA.
2. **General Users** – provides more generalist help and guidance on the survey.

NOTE: please also note that all sections of the survey have specific 'in context' help and guidance on the survey screens. Some sections also have separate help files that can be accessed from the top of the particular survey section.

1. SPA Guide - Introduction

The annual Oil & Gas Authority (OGA) Stewardship Survey (the Survey) has replaced the multiple old surveys, streamlining the way that data is collected into a single source.

The Survey should be completed by the operators of all UKCS wells, licences, fields, infrastructure and hubs. Where a licence area has been subdivided, the licence administrator should complete the Survey only in respect of the subarea for which it is the operator (if any) rather than the entire licence area. Each additional subarea licence operator should also complete the Survey for their subarea of the licence.

The Survey data will be held by the OGA in accordance with the Energy Act 2016 and will be used, among other things, to inform asset stewardship reviews and provide meaningful insights into current and forecast activity in the UKCS.

The information requested in the Survey is intended to support the central and supporting obligations set out in the Maximising Economic Recovery Strategy for the UK (MER UK Strategy) and includes requests for data in ten areas:

- Licensing, Exploration and Appraisal;
- Reserves and Resources;
- Operator activities, including production and costs;
- Decommissioning;
- Production Efficiency;
- Technology;
- Supply Chain; and
- Wells.

Each organisation participating in the Survey is required to appoint a Single Point of Accountability (SPA) to coordinate its response.

This User Guide will assist an organisation's SPA to manage and assign users to complete the Survey. It explains how users can be allocated to different parts of the Survey, so that they can complete the certain sections and questions for an organisation.

Reviewing the Survey matrix

When you click on the **Respond** link to access the Survey, you are presented with three areas:

1. **Contact details** – for the UK Energy Portal Service Desk, who can help you with any questions you may have on the Survey or any technical issues.
2. **Survey deadline & data disclosure agreement** – stipulates the time and date when the Survey must be completed by and who raw Survey data may be provided to. SPAs should complete this section. Click on the **+Show** link to expand, read and provide consent.
3. **Survey matrix** - the matrix will display the sections of the Survey that you are responsible for completing. If you have queries on a Survey section you do not have the data for and cannot complete, or you need a Survey section added to your user account, your SPA will be able to assist and/or update these details for you.

View or Update Survey Teams

If you are the SPA for your organisation, or you have the 'Maintain UKSS contacts' role for your organisation's user account, you are required to allocate sections of the Survey to relevant user accounts within your organisation. Different user accounts can be allocated single or multiple sections of the Survey to complete.

Once a Survey section is allocated to a user account, that user will be able to view that section in their Survey matrix. All eight sections of the Survey can be allocated to one user account, or individual sections can be allocated to different user accounts for completion.

To view the user accounts within an organisation that have been allocated Survey sections for completion (the Survey team) follow the steps below.

Step	Action
1	Go to your Workbasket and on the left menu, click on the **UKSS dashboard**.
2	Click on the **View or update survey teams** link. The Survey team screen appears.

3	In the **UKSS Organisation Group** field, the name of your organisation will automatically be entered. Three main sections will be available.
	• **Global Team** – where you can view and edit the central contact details of your organisation.
	• **Reporting Unit teams** – where you can view and edit the different Reporting Unit teams. For example, a user may be responsible for reservoir management for one specific field. By using a Reporting Unit team, you can specify what Survey section a user can see.
	• **Add team** – is where you can add a new Reporting Unit type, which can be broken down into:
	  • Licence
	    • Field
	    • Hub

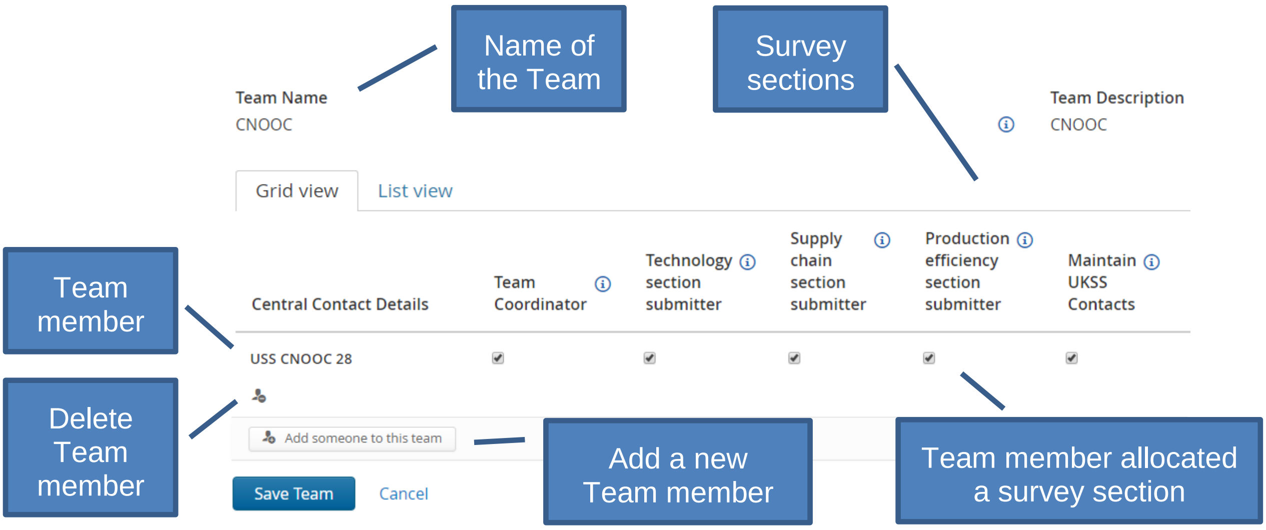
	Click on the **Edit team** link to view the users in each team and see which survey sections they have been allocated.

Add a new user to the global team

The global team has access to all Survey sections. Different members of the Survey team can have access to different parts of the Survey, however all sections must be allocated to a user account.

If a team member is allocated only one section of the Survey for one field, for example, then their user account will be set up using the reporting unit section.

Maintain Team Screen



To add a new user to the global team and allocate them one or more of the Survey sections, follow the steps below.

Step	Action
1	Go to your Workbasket and on the left menu, click on the **UKSS dashboard**.
2	Click on the **View or update survey teams** link.
3	In the **global team** section, click on the Edit team link. The **Maintain Team** screen appears.
4	To add a new user to the global team, click on the **Add someone to this team** button.
5	In the **Select Person** area, enter all the details of that user and click on the **Add Person** button, or click on the **Add Me** button to add yourself as the user.
6	The name of the team member will now appear in the **Central Contact Details** column. If any of the details you entered on the **Select Person** screen were incorrect,

	for example the wrong telephone number, the details that are stored on the UK Oil portal will be displayed in the **Central Contact Details** column for that user

Step	Action
7	Select which roles and Survey sections this team member will have access to on their user account by placing a tick in the checkbox underneath each role or survey column. User Roles: • **Team Coordinator** – there is only one SPA per organisation and that team member will be assigned the Team Coordinator role. This role can maintain the global and reporting unit team's roles as well as access Survey sections and receive Survey related emails, for example when a Survey is open, when a section is sent back for correction and reminder emails if a Survey section has not been submitted. • **Maintain UKSS Contacts** – any team member assigned this role can update the global team's roles and Survey sections as well as maintaining the reporting unit teams. Survey Sections for the organisation: • Activity • Decommissioning • Licensing, Exploration & appraisal • Production efficiency • Reserves and Resources • Supply chain • Technology • Wells
8	Click on the **Save Team** button to save any new members added to the global team. You will be taken back to the Survey teams screen.

Add a reporting unit team

To add a team member to the system who is allocated a field or licence for one section of the Survey only, you will use the **Reporting unit teams** area.

Initially, you will need to add a **Reporting unit type** to the teams screen before you can add in new team members. To do this, follow the steps below.

Step	Action

<table>
<tr><td>1</td><td>Follow steps 1 to 2 of the Add a new user to the global team section.</td></tr>
<tr><td>2</td><td>On the UKCS Stewardship Survey teams screen, move down the screen to the Add team section. In the Reporting unit type field, select the relevant reporting unit type:
Licence
Field
Hub</td></tr>
<tr><td>3</td><td>Once the type is selected, the Reporting unit field becomes available. Click on the drop down arrow to select the Reporting unit you are creating.</td></tr>
<tr><td>4</td><td>Click on the Add team button. The Maintain Team screen appears.</td></tr>
<tr><td>5</td><td>To add a new user to the new Reporting unit, click on the Add someone to this team button.</td></tr>
<tr><td>6</td><td>In the Select Person area, enter all the details of that user and click on the Add Person button, or click on the Add Me button to add yourself as the user.</td></tr>
<tr><td>7</td><td>The name of the team member will now appear in the Central Contact Details column.
If any of the details you entered on the Select Person screen are incorrect, for example the wrong telephone number, the details that are stored on the UK Oil portal will be displayed in the Central Contact Details column for that user.</td></tr>
<tr><td>8</td><td>Select the relevant survey section for that Reporting unit.
<table>
<tr><th>Reporting unit</th><th>Section of the survey</th></tr>
<tr><td>Field</td><td>For each field, there are four survey sections to be completed:
Reserves & Resources
Decommissioning
Wells
Activity
All four sections need to be allocated before the team can be saved. If multiple team members are allocated different survey sections for the same Field, ensure that all of their details are included before updating that Field’s Reporting unit.</td></tr>
<tr><td>Hub</td><td>Production efficiency</td></tr>
<tr><td>Licence</td><td>Licensing & Exploration/Appraisal</td></tr>
</table></td></tr>
<tr><td>9</td><td>Click on the Save Team button. You will be taken back to the UKCS Stewardship Survey teams screen. The new Team will be in the Reporting unit teams area.</td></tr>
</table>

Edit a team

The Global team or Reporting unit teams can be amended at any time. A new user can be added to the team, a Survey section can be added to a user already on the team, a Survey section can be removed from a user account or a user can be removed from the team.

To edit a team, follow the steps below.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Follow steps 1 to 2 of the Add a new user to the global team section.</td></tr>
<tr><td>2</td><td>At the end of the team you would like to update, click on the Edit team link. The Maintain Team screen appears.</td></tr>
<tr><td>3</td><td><table>
<tr><th>If you would like to…</th><th>Then…</th></tr>
<tr><td>Add a new survey section to the team member's user account</td><td>Place a tick in the Survey sections checkbox</td></tr>
<tr><td>Remove a survey section from the team member's user account</td><td>Untick the Survey sections checkbox</td></tr>
<tr><td>Delete a user from the team</td><td>Click on the remove person icon .</td></tr>
</table></td></tr>
<tr><td>4</td><td>Click on the Save Team button. You will be taken back to the UKCS Stewardship Survey teams screen.</td></tr>
</table>

Delete a Reporting unit team

To delete a Reporting unit team, follow the steps below.

Step	Action
1	Follow steps 1 to 2 of the Add a new user to the global team section.
2	At the end of the team to be removed, click on the Delete team link.
3	If you are certain that the team is to be removed, click on the **OK** button. The team is automatically deleted.

UK Oil Portal (UKOP) Helpdesk contact details

- Telephone Number: 0300 067 1682
- Email address: ukop@ogauthority.co.uk

2. General User Guide - Stewardship Survey

The annual Oil & Gas Authority (OGA) Stewardship Survey (the Survey) has replaced the multiple old surveys, streamlining the way that data is collected into a single source.

The Survey should be completed by the operators of all UKCS wells, licences, fields, infrastructure and hubs. Where a licence area has been subdivided, the licence administrator should complete the Survey only in respect of the subarea for which it is the operator (if any) rather than the entire licence area. Each additional subarea licence operator should also complete the Survey for their subarea of the licence.

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- Licensing, Exploration & Appraisal;
- Reserves and Resources;
- Operator activities, including production and costs;
- Decommissioning;
- Production Efficiency;
- Technology;
- Supply Chain; and
- Wells.

Access the Survey

Each organisation participating in the Survey is required to appoint a Single Point of Accountability (SPA) to coordinate its response. Your organisation's Single Point of Accountability can allocate different user accounts to complete single or multiple sections of the Survey.

When a section of the Survey is allocated to you, you will receive an email confirming that the Survey is ready for completion. Go to the UK Energy Portal to access to your organisation's homepage, which is called the Workbasket. The areas of the Survey that have been assigned to you will appear as a line in your Workbasket. An example is shown below.

Transaction / Ref	Subject / Topic	Company	Status / Date	Information	Actions
UKSS/2016/NOV/016	UKCS Stewardship Survey November 2016	CNOOC LIMITED	Open Deadline: 17th February 2017	Survey in progress	Respond

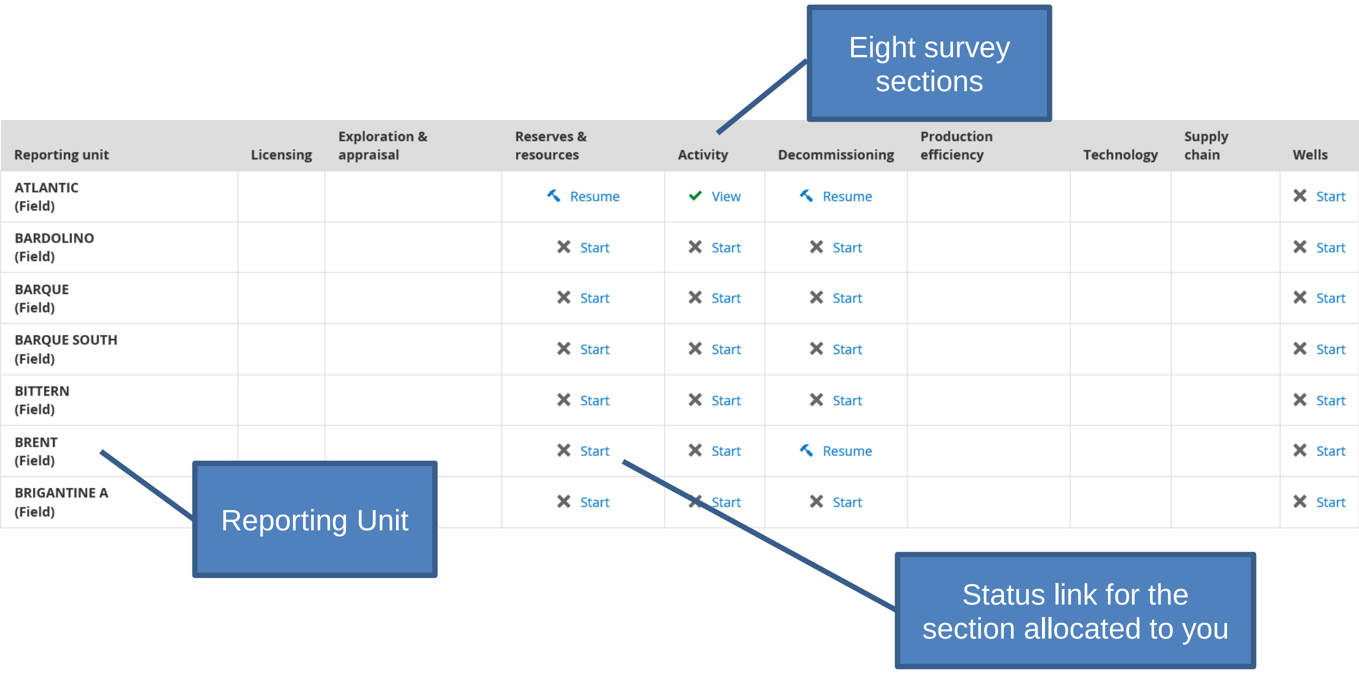
Field	Description
Transaction / Ref	The reference for the Survey and the year it was opened.
Subject / Topic	The title of the Survey.
Company	The name of your organisation.
Status / Date	The status of the Survey, for example that the Survey is open and the deadline by when the Survey has to be complete.
Information	The stage at which the Survey is in, for example in progress.
Actions	Click on the Respond link to access the Survey.

Click on the **Respond** link to access the Survey matrix.

Reviewing the Survey matrix

When you click on the **Respond** link to access the Survey, you are presented with three areas:

2. **Contact details** – for the UK Energy Portal Service Desk, who can help you with any questions you may have on the Survey or any technical issues.
3. **Survey deadline & Data Disclosure Agreement** – stipulates the time and date when the Survey must be completed by and who raw Survey data may be provided to. SPAs should complete this section.
4. **Survey matrix** - the matrix will display the sections of the Survey that you are responsible for completing. If you have queries on a Survey section you do not have the data for and cannot complete, or you need a Survey section added to your user account, your SPA will be able to assist and/or update these details for you.



Reporting unit	Licensing	Exploration & appraisal	Reserves & resources	Activity	Decommissioning	Production efficiency	Technology	Supply chain	Wells
ATLANTIC (Field)			Resume	View	Resume				Start
BARDOLINO (Field)			Start	Start	Start				Start
BARQUE (Field)			Start	Start	Start				Start
BARQUE SOUTH (Field)			Start	Start	Start				Start
BITTERN (Field)			Start	Start	Start				Start
BRENT (Field)			Start	Start	Resume				Start
BRIGANTINE A (Field)			Start	Start	Start				Start

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Survey sections</td><td>The Survey has been organised into sections that reflect areas of the Exploration & Production lifecycle (Licensing through to Decommissioning). Each section must be completed with the most accurate data available.</td></tr>
<tr><td>Status link</td><td>The status links will be available on the sections of the Survey that you have been assigned to complete.

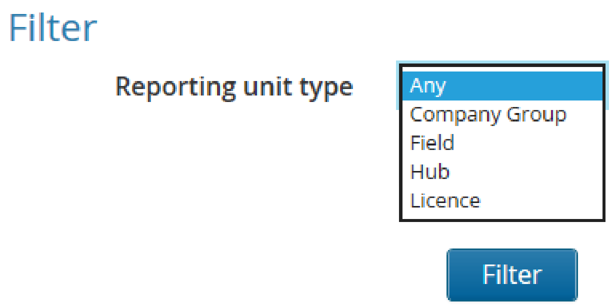
Start – click on the start link to access the Survey section for that specific Reporting Unit.
Resume – the Survey section has been started as the Start progress button has been selected, however, the section is not complete. Click on the Resume link to continue to enter the Survey responses.
View – the Survey section has been submitted.
Start Correction requested – the Survey has been submitted to the OGA, it has been reviewed and there are some updates have been identified that need to be actioned and re-submitted.
View Approved – the Survey section has been submitted and the OGA has approved the data.
</td></tr>
<tr><td>Reporting unit</td><td>The Reporting units that have been allocated to you for completion will be listed on the left. These units are assigned to your user account by your SPA. The units are:
<table>
<tr><th>Reporting Unit</th><th>Section of the Survey</th></tr>
<tr><td>Company Group</td><td>Provides access to all sections of the Survey, for example if responsibility for providing the decommissioning data for all of your organisation’s fields is allocated to you, the status link will be present on the matrix on the Company name line under the Decommissioning column</td></tr>
<tr><td>Field</td><td>For each field allocated to you there are up to four Survey sections to be completed:

Reserves & Resources
Decommissioning
Wells
Activity
</td></tr>
<tr><td>Hub</td><td>For each hub allocated to you there is one survey section to be completed:</td></tr>
</table></td></tr>
</table>

		• Production Efficiency
	Licence	For licences allocated to you, there is one Survey section to be completed per licence: • Licensing & Exploration & Appraisal

Filtering the survey matrix

Depending on the number of Survey sections allocated to you for each Reporting Unit, you may want to reduce the matrix whilst working on each section:



1. Click on the drop down arrow next to the **Reporting Unit type** and select the Unit you would like to work on.
2. Click on the **Filter** button to refresh the matrix.

Select **Any** in the **Reporting Unit type** field to show all sections of the Survey you have been allocated.

Accessing and completing a Survey section

From the Survey matrix, follow the steps below to access and complete the section.

Step	Action
1	To access a section of the Survey, click on the ✖ Start status link.
2	To inform the OGA that work has begun on this section of the Survey, click on the **Start progress** button, then the **OK** button. If you do not complete the Survey section initially, the status link will change to say Resume . To go back to the Survey matrix, click on the **UKSS survey matrix** link.
3	Start to enter data in the Survey. Use the Next → and ← Back links to move around the Survey. Alternatively, all areas of the Survey section will appear on the left menu. Click on the area name to access that part of the survey section and complete as required.

	The data will be saved automatically when you click on the Next link or a Survey section on the left menu.
4	When the area is completed, a green tick will appear next to the name of the area. New development wells ✔ All areas need to be complete before the section can be submitted. A red cross next to the area name will mean that part of the area still needs to be completed. Click on the name on the left menu and all fields that need to be updated will be highlighted in red.
5	Review all of the data on the sections, then if required, click on the **Download a PDF of this section link** to save a copy of the data entered.
6	Once all of the areas of the Survey section have been completed, the last page is the **Submit section**. Click on the **Submit** button. Ensure that you review your data prior to submitting as once the Survey section has been submitted, the data cannot be changed without sending a request to the UK Energy Portal Service Desk.
7	If you are happy with the data being submitted, click on the **OK** button.
8	To review the Survey section, and download a pdf copy of the data, click on the ✔ View status link from the survey matrix.

If there are any sections of the Survey that have not been submitted, the SPA for your organisation will receive email reminders at 20, 10 and 5 working days prior to the Survey deadline.

Updating Survey correction requests

If you have asked for a section of the Survey to be re-opened so that you can amend some of the data, or once the OGA has reviewed the Survey details and has requested corrections, you will receive an email asking you to amend the data provided and re-submit the Survey section.

To review and amend the details, follow the steps below.

Step	Action
1	Go to your Workbasket and click on the **Respond** link at the end of the Survey entry.
2	Any sections of the Survey that require corrections will have changed from a status link of ✔ View to ✖ Start, and under the **Start** link, there will be a yellow **Correction requested** icon, Correction requested. Click on the **Start** link to access the survey section.
3	To re-start the Survey section, click on the **Start progress** button.
4	On the pop up message, click on the **OK** button.
5	At the top of the screen, a correction request banner will appear. Click on the **here** link to view comments that have been added by the OGA. Once reviewed, click on the **Close** link.

6	Update the data and move to the **Submit section**.
7	Review the new data and then click on the **Submit** button.
8	Select the **OK** button if you are happy with the data being submitted on the survey. The status link will change back to the View status link.

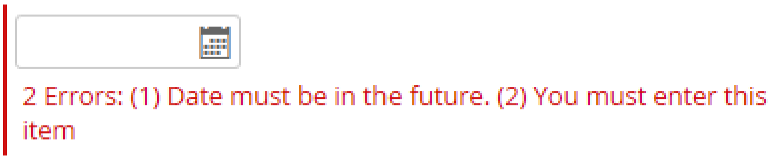
Searching for submitted Survey data

Once all of Survey sections for your organisation have been submitted and the OGA has approved and closed your organisation's Survey, you can search for the closed Survey, view any of the responses that you have submitted and download a pdf document of the data entered into that Survey section. In subsequent years any open Surveys will also be available to view.

Step	Action
1	Go to your Workbasket and on the left menu, click on the **UKSS dashboard**.
2	On the Survey dashboard, click on the **Search for surveys** link. If you see the **View or update survey teams** link, refer to the SPA Manage Users User Guide.
3	Use one of the **Filter** options to find a Survey, then click on the **Search** button.
4	The matching names of the Surveys and a brief description will appear in a list under the **Filter** options. Click on the **View** link to view the survey data.
5	The Survey matrix will appear. As this is a view only matrix, the status links will be different. • **Not Started** – you have not started to answer this part of the Survey section. • **In progress** – you have started the Survey section and clicked on the **Start progress** button. • **View** – you have completed the Survey section and have submitted it to OGA. Click on the **View** link to print a copy of the data in this Survey section. To do this, click on the **Download a PDF of this section** link. • **View Approved** – OGA have checked and approved this section of the survey You can only view sections that have been submitted. If you want to update any of the Survey sections, go back to your Workbasket and click on the **Respond** link.

Important Points

1. You can copy and paste from word or excel into the online Survey for many sections of the survey.
2. The data entered is automatically saved when you click on the **Next** link to move to the next section of the Survey, or click on a different section of the Survey on the left menu.
3. You can save a copy of the data entered by clicking on the Download a PDF of this section link.
4. When a section of the Survey is complete, a green tick will appear next to that section on the left menu.
5. When a section of the Survey requires additional information to be entered, a red cross will appear next to that section on the left menu. Guidance on how to complete the required field will be provided, for example



6. When a section of the Survey is submitted to the OGA, that section is then locked and only the answers can be viewed. The Survey sections should only be submitted when all the required information has been provided and your organisation is satisfied with the responses for that section.
7. If you have any questions about the Survey, please contact your SPA, or contact the UKOP helpdesk on:

- Telephone number: 0300 067 1682
- Email address: ukop@ogauthority.co.uk

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