

Crude Oil Data Exchange

Implementation Guidelines



Petroleum Industry Data Exchange
A Standards Committee of the American Petroleum Institute

American Petroleum Institute
1220 L Street Northwest
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Documents

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CODE

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Crude Oil Data Exchange

Statement of Purpose and Industry Use

Purpose

- Exchange document data from crude oil or product run tickets, crude oil lease and point of sale run statements, and tank strapping increment tables in a standardized fixed record format.

Benefits

- Early booking of crude oil volumes and values.
- Effective monitoring of inventories, receipts/delivery balances, shipments and other critical items.
- Reduction in clerical effort.

History

- CODE was installed as an industry standard in 1978 transmitting oil run ticket information. Oil statement records were added to the system in January 1986. Tank increment records were added to the system in January 1989.

Implementation and User Guide

Exhibit A

Record Formats

Exhibit B

Implementation and User Guide Crude Oil Data Exchange (CODE)

Exhibit A

Receiving From Other Companies

The following is an outline of steps that a company might follow to obtain maximum benefits as a receiver of CODE data.

1. Initiate a study to determine how your company would like to use CODE data after it is received in-house.
2. Initiate a project that would allow for processing the CODE data through the appropriate accounting area in your company.
3. You will need to identify the companies that you would like to receive data from.
 - a. Prioritize a list of potential sending companies.
 - b. Compile a list of property codes.
4. Prepare a letter to the accounting contact of the company you want to receive from. It should contain the following:
 - a. Your company ID.
 - b. A list of the property codes for which you would like to receive CODE information.
 - c. The names and phone numbers of your company's accounting and system contacts.
 - d. A firm date when you will be ready to receive CODE transmissions or a date when you will contact the transmitter to give them further start-up information.

Transmitting to Other Companies

- In order to become a transmitter of CODE data, in-house run tickets, oil run statements or tank increment data will have to be converted to the standard CODE record formats. Be very careful to follow the exact data formats.
- Advise the contact of the company you plan to send data to of the following:
 - a. Your company ID.
 - b. Request a list of property codes they need transmitted.
 - c. The names and phone numbers of your company's accounting and systems contacts.
 - d. A firm date when you will be ready to send CODE transmissions.

Exhibit A

continued

CODE Operating Conventions

The following is a list of operating convention within CODE.

- 1.** At no time shall a sender of CODE data retransmit run ticket or run statement data to any receiver without the receiver's prior knowledge and permission. To do so will cause the receiver to incur additional charges for the same transmission.
- 2.** All senders and receivers of CODE data are strongly encouraged to comply with all standards and guidelines regarding data formats. Failure to do so will result in system degradation.
- 3.** Price adjustments should not generate a new run ticket record. They should not be included in transmissions. The run ticket transmission should reflect the hard copy.
- 4.** When adjustments are made, the incorrect entry should be reversed and the corrected entry should be sent. The adjustment indicator field should be set to '1' for both records.

Crude Oil Data Exchange

Exhibit B

**Record Formats
and Layouts**

**Run Tickets
and
Run Statements**