

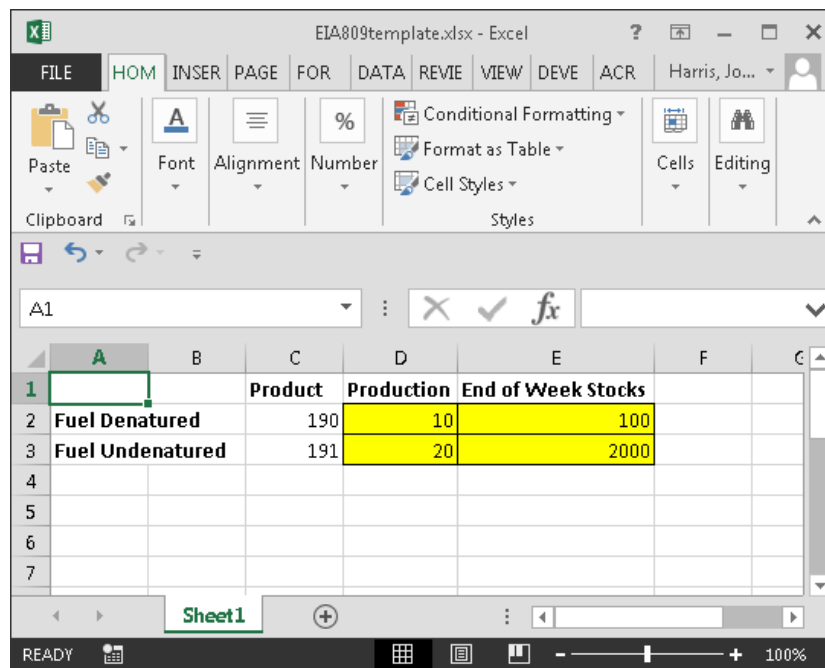
Guide to Linking Data to EIA Petroleum Supply Survey Forms

November 2016

Previous versions of EIA petroleum supply forms allowed users to add a worksheet to the Excel workbook, and then copy and paste data or link cells onto the existing form from the new worksheet. The new versions of our EIA survey forms now contain password-protected cells, and no longer allow users to add additional worksheets to the workbook. However, users still have the option to copy and paste data or link cells onto the EIA survey forms' worksheets.

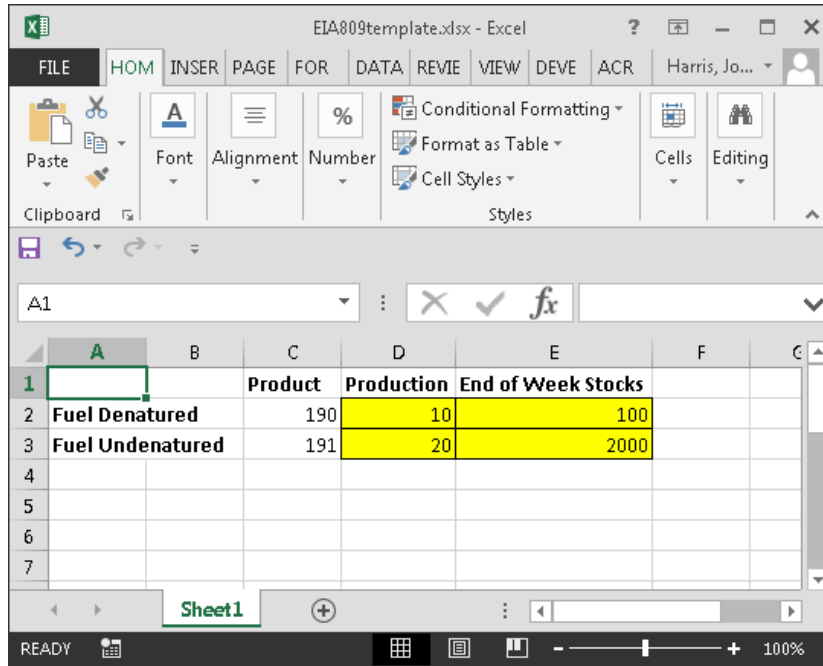
To link your existing data to the new worksheets, it is recommended that you first create a separate Excel template, which will in effect serve the same purpose as a new tabbed worksheet in the form file itself. You will then export or copy your data into the template each month; the data will then be automatically copied into the new EIA form's spreadsheet. A detailed description of the steps involved to set up this new template is provided below:

1. First, download the new Excel version of the EIA form from the website. Survey forms are found here: <http://www.eia.gov/survey/#petroleum> In our example, we will use the EIA-809 form.
2. After you download the form and open it in Excel, save it with a date-specific name on your hard drive or network; for example, save Form EIA-809 as **EIA809_110416.xls** for the week ending November 4, 2016.
3. Open a new blank workbook in Excel, and save it as **EIA809_template.xlsx**. This will serve as the file to which you will be copying your company data. In informal fashion, set it up to resemble the data-entry portion of the form you are working with. For example, the EIA-809 has only four data-entry cells, so you should set up the initial template to look something like this:

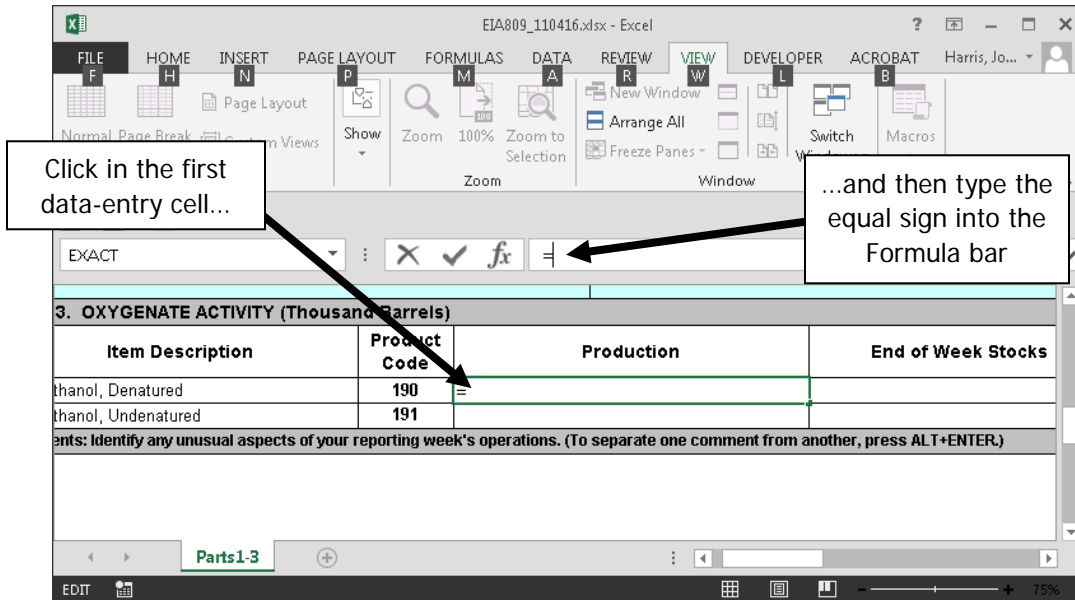


Note that it basically resembles the data-entry section of the EIA-809 form; because this template is for your use only, it's up to you how closely you want it to look like the actual form, for your own purposes. The important thing is to have the highlighted cells above set up to receive the data from whatever source your company is sending it from.

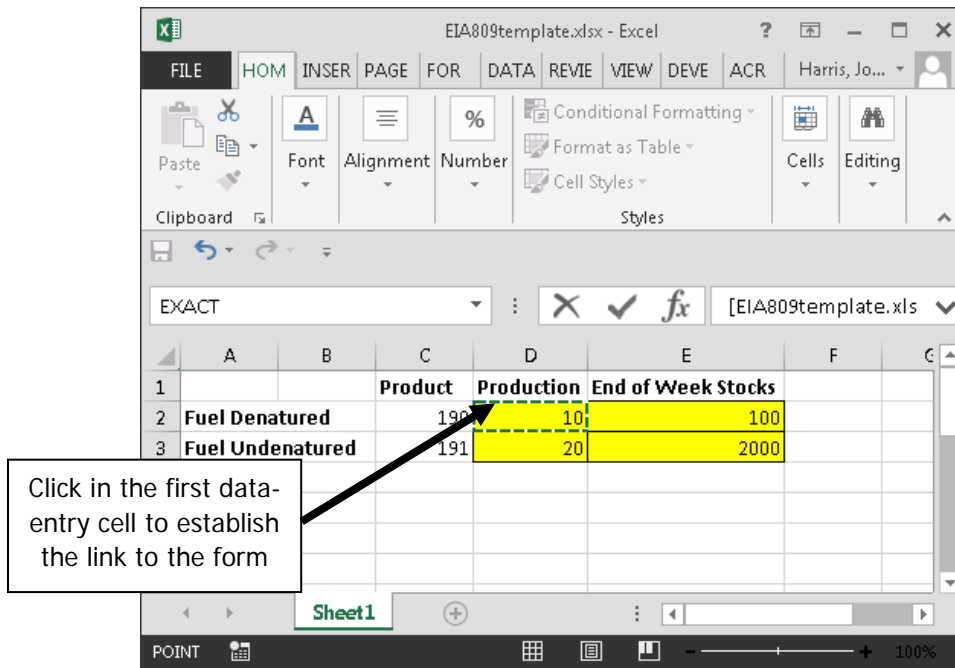
- Now that the template is set up, copy your company data into the data entry cells using whatever method you were previously using to copy them into the old form's spreadsheet. Ideally, you should set this up so that your data system will feed the new data to this same template each week/month (automatically, if possible). This template won't change; only the data you feed it will be updated for each report period.



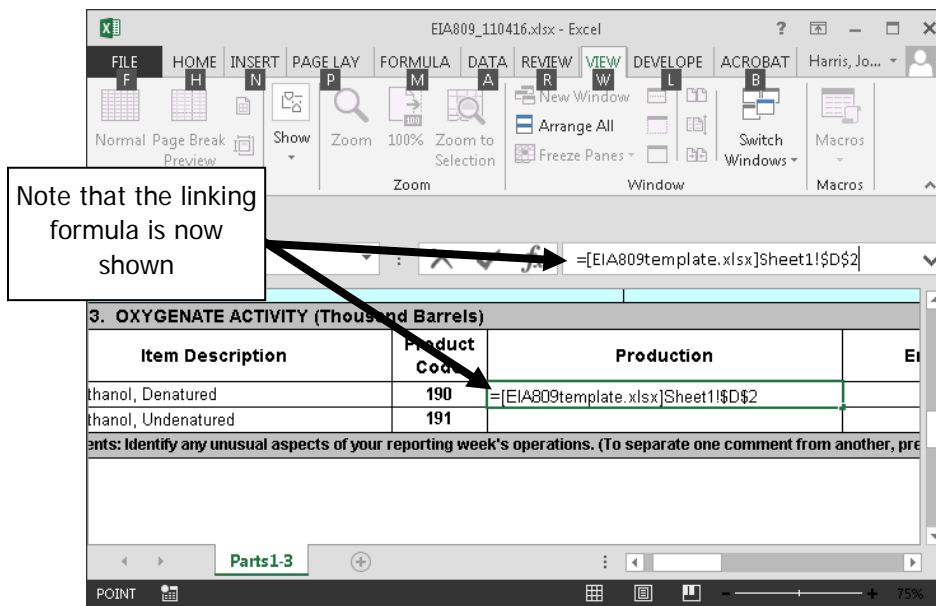
- Click (or ALT-TAB) back over to the new Form spreadsheet, and set up the links to the Template in the appropriate formula bar. To do so, move your cursor into the first data-entry cell, and type in the equal sign (“=”) into the formula bar, to alert Excel that a formula is being entered.



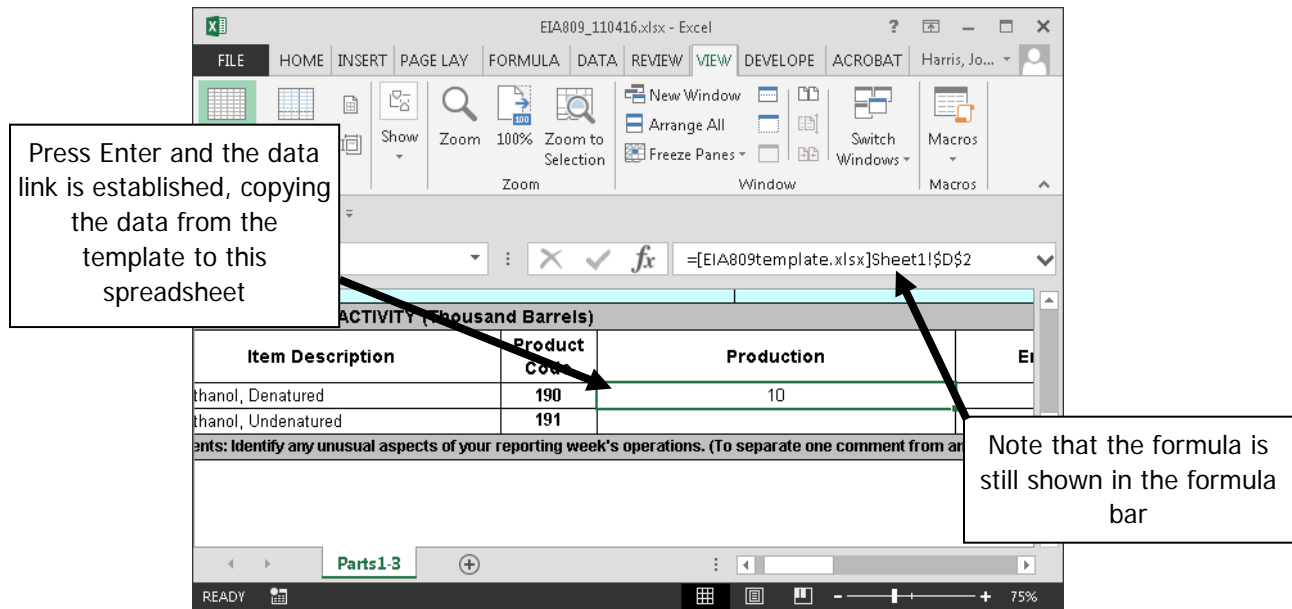
- With your cursor still in the data-entry cell's formula bar (next to the equal sign), click back over to the Template and click the corresponding data-entry cell in the Template, as shown below:



- When you click back to the Form spreadsheet, you will now see the formula (=EIA809template.xlsx]Sheet1!\$D\$2 in the sample below) in the formula bar, linking the Form spreadsheet to the Template's cell, as shown below:



- With the cursor still in the formula bar of the Form spreadsheet, press **Enter** to activate the link. The data from the Template will appear in the cell on the form, as shown below:



- Perform these linking steps (Steps 5 through 8) for each of the data-entry cells in the Template and Form spreadsheets. For example, in the EIA-809, you will need to create four such links, for each of the four data-entry cells. Some forms have many more cells, and their Templates will require more time to set up. But you will only need to create these links one time, and use the same Template and Form spreadsheets each week/month.
- After you have created all of the necessary links to the data-entry cells, and the current data appears in your Form spreadsheet, your form should be ready for submission. Save the **EIA809_110416.xls** file to your hard drive/network, and submit it as you have in the past, via Secure File Transfer, email, or fax.
- When it is time to submit your next form, open the previous week's Form file (**EIA809_110416.xls**) and save it with the new period's name (**EIA809_111116.xls**, in our example). The new file will have the necessary links to the Template already in place, as you set them up last week/month. Then open the Template. Export your company data into the Template as you did in Step 4 above.
- When your company data for the current period are loaded into the Template, they will be automatically copied into the appropriate cells in the Form spreadsheet (**EIA809_111116.xls**). Review your data, save the form, and submit as usual.

Repeat steps 11 and 12 each week/month in order to prepare and submit your form. If you have any questions about this process, please contact the corresponding survey manager. Their contact information is listed on each survey form.