CanOils Quick-Guide

Getting Started: 3 Ways to Navigate the System

1. Report Builder
   Build a custom report from a given module.

2. Module Bar
   Jump straight into a Dashboard View of all data in a module.

3. SmartSearch
   Quickly load a Dashboard View of any company or area.

Basic Navigation: Understanding the Pop-ups

Home-page / Report Builder Window
The first window a user opens will contain the home page. It will re-load into a report builder whenever a user activates custom reporting functionality in the system.

Dashboard Window
The Dashboard Window will open up when a user uses SmartSearch or the Module Bar. This window will act as a middle-ground between the Home-Page/Report Builder window and a Report Window.

Report Window
A Report Window will open up whenever a user loads a report.

Not sure where to start? Try searching a company name in SmartSearch!
There are lots of pre-built reports in the dashboards that can be modified in the report builder with the Edit button.

For more helpful guides, tips, and tricks contact support@EvaluateEnergy.com
Getting Started with Peer Groups

Understanding Peer Groups

Peer Groups are lists of companies that can be queried for data items. Each of these companies then has data points that can be queried through the various reporting modules.

Building a Peer Group

From the Home Page
1. Click into “Companies” > “Build Peer Group”
2. Choose the Companies to include in your list, and then “Save Group” for later use.
You can also start with a pre-existing peer group saved into your system, or cast a wide net by filtering a peer group by Region and Activity type.

From the Report Builder
When you are selecting companies in the report builder, you will also have the option to save your selected companies into a peer group for later use.

Loading a Saved Peer Group

From the Report Builder
When you are selecting companies for a report, choose “Advanced” > “Load Group”. You can then find your saved peer group in your saved folders.

In the Front End
To load multiple companies into our front-end dashboards, simply click on “Companies” > “Multiple Companies” from the home page. From there, you can load in your saved peer group for easy navigation.

Analyst Notes
• When building Peer Groups, make sure to select/deselect “Hide Dead Companies” based on whether you want to exclude/include companies that are no longer reporting.
• You can manage your saved reports and peer groups in the “My Reports” > window.
• Want to speed up M&A analytics? Try out “Tools” > “Merge” in the black toolbar. This tool will merge two companies into a single profile for you to review as a combined entity.
Using the CanOils Report Builder (Historic Financial/Operating Data)

Step 1) Open the Report Builder

From the homepage, use the black toolbar to select “Reports” -> “Build New Reports”

Access Saved Reports
From the homepage use the black toolbar to select “Reports” -> “My Reports”

Step 2) Select a Peer Group

Peer Group Options
- Search for individual companies
- Select multiple companies from a list
- Save a list of selected companies
- Advanced Selection Options:
  - Load a saved Peer Group
  - Filter by a Country or Activity
  - Ranked List of companies based on any database item criteria.
  - Dead Companies are those which have been delisted or acquired, and therefore no longer report independently. They can be included or removed from a report by using the provided check-box.

Step 3) Choose your Date Range

Date ranges refer to fiscal reporting periods. You can use the “Reporting Period” data item to reconcile these dates against their calendar equivalents.

Step 4) Choose your Data Items

Corporate Financial Data
Raw data from the financial statements
Corporate Financial Analysis
Calculated metrics/ratios from the financial data
Oil & Gas Operating Data
Raw data from the operating reports
Oil & Gas Operating Analysis
Calculated metrics/ratios from the operating results
Service Company Information
Metrics that specifically apply to service companies (i.e. Drilling Utilization)
Company Guidance
Corporate guidance information from PowerPoint presentations.

Step 5) Choose your Layout Options

Grouped Across: List your item groupings across columns instead of in row blocks. Improves readability for multiple item blocks.
Worksheet View: Organizes your item blocks into multiple spreadsheet tabs.
Display Options: Hide comments, show rank numbers, and adjust headings
Advanced Options: Change your report to show aggregates, growth rates, or average values.
Using the CanOils Report Builder (M&A / Financings / Wells, etc.)

The Historic (Financial/Operating) Module has a unique data structure, and therefore a unique report builder. All other modules use the report building methodology described below.

Step 1) Open the Report Builder

From the Reports Toolbar
From the homepage, use the black toolbar to select “Reports” -> “Build New Reports”

From a Saved Report
From the homepage use the black toolbar to select “Reports” -> “My Reports”

Step 2) Select Query Items

- Navigate the folder path to identify items of interest, and ‘include’ them in the report.
- You can also change the order of selected items, or ‘exclude’ them from your existing list.
- Note that any items that are highlighted in the folder path will be ‘included’. Make sure unselect items you’ve changed your mind about.

Hit “Next >>” when you’re ready to proceed.

Step 3) Filter Selected Items

- Expand the report items to see filtering and sorting options (not all items can be filtered).
- Use the “Add/Remove” button to return to the previous page and change your item list.
- When filtering by company, there are additional options for querying (ie. use a saved peer group).

Step 4) Apply Formatting Options and Run

- Reports <10mb can be previewed in HTML, and others can be run into Excel.
- Note that large queries will time-out after 20min.
- Use “Show Record IDs” and “Show Repeated Data” when you are looking to use tools like Pivot Tables or Data Frames. Be sure to review the data after doing so to prevent double counting.

Quick Note on Data Structure

- You might notice that some of the items render with blanks across multiple lines (for example: Regions will show all regions tagged to a deal).
- To correct this issue you can:
  - Replace the item with it’s “Summary” equivalent (ie. “Regions Summary”).
  - Use “Show Repeated Data” to duplicate the entry for each tag.

Analyst Notes

All company names and data ids have been standardized throughout the system. This means you can download multiple reports from separate modules, and integrate the data in Excel using formulas or the integrated Power Query Data Model.
Grouping & Aggregating with the Report Builder

Introduction to Aggregation
The CanOils report builder has the ability to group and aggregate reports for you, similar to a pivot table. The trick to utilizing this functionality is minimizing your report size, and properly planning your data items. Aggregations can be pulled from any report builder other than the historic/financial modules. This includes M&A, Financings, Wells, Land, Key Personnel, Forecasts, Guidance, and Oil Sands queries.

In this example, we will build a grouped M&A report to see total deal values grouped by the nationality of the acquiring company, and sub-grouped by the deal type.

Step 1) Setup a Query
• Set up a query in your desired module, and organize your items according to the hierarchy you wish to group by.
  Hit Next when you’re done.

Step 2) Apply Filters and Sort Aggregators
• For this query, we will filter “Acquirer Based in” to only include “Canada” and “United States”.
• Click “Sort” next to each of the category items that will be used group the data.

Step 3) Setup the Aggregation
• Check off:
  • “Show Data Aggregates”
  • “Hide Records” (Optional)
  • “Group by Headings”
• Under “Group by Headings” select how far down the hierarchy tree we want to aggregate by. All items above the filled circle will be grouped.

Step 4) Run the Query
The final result will be an aggregated report, grouped by your defined headers.

Once you’ve run the query, you can play around with the options to see different formatting capabilities that can be applied.

You can also use the “Add/Remove or Reorder Items” button to experiment with different hierarchy orders in your selections.

Analyst Notes
Having trouble with your first grouped report? Give us a call, and we’ll help step you through it over the phone.

Flat-file data from the Report Builder can also easily be mapped into a Pivot Table in Excel. Just click into the data in Excel and select “Insert” > “Pivot Table”.

<table>
<thead>
<tr>
<th>Selected items for Report:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acquirer Based in</td>
</tr>
<tr>
<td>Deal Type</td>
</tr>
<tr>
<td>Total Acquisition Cost (000)</td>
</tr>
</tbody>
</table>
Using the Assets Map

**Access the Map**
From the home page, just click “Assets” > “Map”.

The other available options will provide you with dashboard aggregations of the well database.

**Understanding the Toolbar**
- Opens the filter tool, allowing you to start a search
- Clears out any existing search criteria, resetting the map.
- Opens the “identify” tool, for visual searching (i.e. Draw a box around wells)
- Land options, mainly used to add a colour-pallet to the land parcels
- Opens the map legend for symbol identification
- Opens up the “layers” menu, allowing you to turn on

**Example Query: Active or Suspended wells in the Viking, Operated by Raging River**

1. Select the item you want to search for
2. Define how you want to search in the item-set
3. Define what you want to find in the item-set
4. Add additional items to your search
5. Add bracketed logic
6. Identify the type of logic you want to apply

**Exporting Data from the Map**

- **Well List / Well CSV**
  Quick list of generic well information

- **Well Shapefile**
  Downloads a shape file that can be easily uploaded into a 3rd party software for additional analysis.

- **Well CSV (Custom) ** *Recommended*
  Select which items you want in your download
  *If you are downloading monthly production, you will need to specify which years to download.*
CanOils Excel Plugin

Introduction

The Excel Plugin allows you to pull saved reports directly into excel in a variety of formats, and provides seamless integration with your existing models. Send us an email to get the download link.

Using the Plugin: The Basic Workflow

**Step 1) Build and Save an Online Report**
The Excel plugin references your “My Reports” profile. This means that you need to build a report in the website to pull into your spreadsheet.

**Step 2) Log-in to the Plugin**

**Step 3) Choose Reports for Download**
Choose from a list of reports that have been previously saved to your online account.

**Step 4) Manage Selected Reports**
After loading a report, the a pop-up will appear for managing your selected items. In here you can:
- “Insert Report” to add additional reports to your spreadsheet.
- “Remove” a report that is in your list
- Choose the sheet and cell to send your report’s information to.
- Choose formatting and data ID options for your downloaded reports

**Step 5) Refresh the Data**
Once you have loaded a report, you can use the “Refresh” button to trigger the download. Note that this might take a few minutes if you have multiple reports, or lots of data.

Analyst Tips

When using the Excel plugin, try experimenting with the “Raw Data” display format, and including “Record IDs” in the download. This will give you a clean data frame with unique company and item ids that you can map into custom calculations or models.

If you are downloading the data into a sheet with lots of formulas, consider switching your Formula Calculation Options to “Manual” updates before refreshing your data. This will speed up the download performance.
Using Data from the Excel Plugin

Best Practices

Downloading the data as “Raw Data” and with “Data IDs” provides you with increased control over your data, and better allows you to take advantage of Excel’s capabilities.

Understanding the Output

CanOils Raw Data is keyed in three dimensions: Date, Company, and Data Item. These three fields will each have unique IDs that we can use to identify unique data points throughout the download.

SUMIFS: The Only Formula you Need

SUMIFS( <Date Column>, <Sought Company ID>, <Company ID Column>, <Sought Item ID>, <Item ID Column>)

The SUMIFS formula can be used to grab an item value from a “RawData” page, and map it anywhere you’d like. All you need to know is the company ID, item ID, and date value you are looking to reference.

For example, if our Raw Data is saved in a tab named “PluginData”, which looks like this:

We can build the page below like this: =SUMIFS(PluginData!C:C,PluginData!A:A,A:A,PluginData!B:B,B:B,C1)

Where each of the orange cells has been entered to identify locations where we want data items or companies to load, and the green cells are automatically calculated by dragging the formula anywhere in the sheet. Take a moment to notice how relative/absolute referencing has been used to accomplish this.

Analyst Tips

Want to take your analytics to the next level? Try loading the raw data set into Excel 2016’s new Power Pivot module, or Microsoft Power BI, which will allow you to easily transform and join the data into even more usable workflows!

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