



OSIsoft.  
REGIONAL  
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THAILAND


JULY 26 - 29, 2011

THE WESTIN  
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## Gaining Insight from PI Data Using New Tools for Operational Intelligence

Kelly Sherrill, Business Development Upstream Oil & Gas

OSIsoft



# Gaining Insight from PI Data Using New Tools for Operational Intelligence

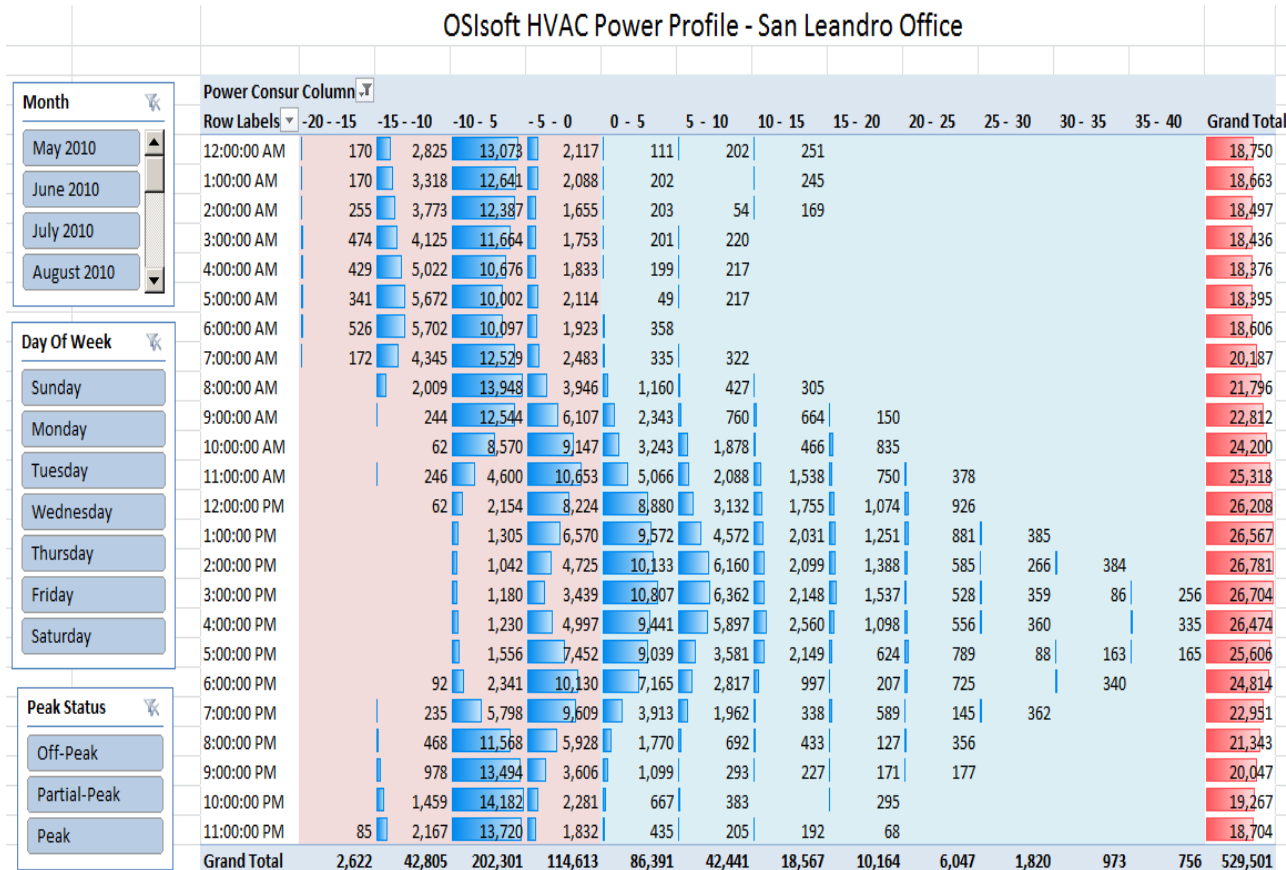
Kelly Sherrill,  
Business Development Upstream Oil & Gas  
OSIsoft



## **Agenda**

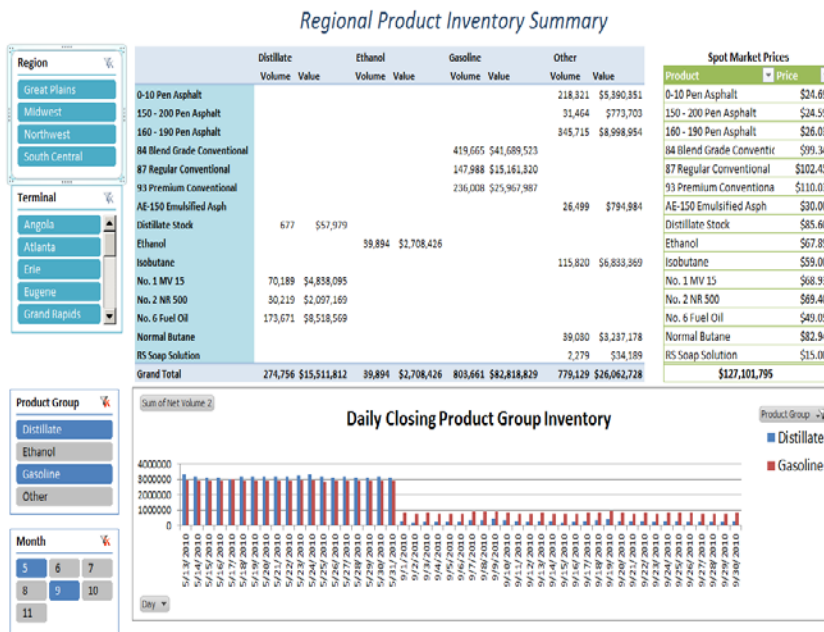
- **Business Intelligence (BI) Technologies**
  - **Multidimensional Data Analysis**
  - **Operational Intelligence**
- **Introduction to “Self-service BI”**
  - **PI AF**
  - **PI OLEDB Enterprise 2010**
  - **Microsoft PowerPivot for Excel 2010**
  - **Microsoft SharePoint 2010 Enterprise**
- **Example Walk Through**
- **Other Examples and Additional Information**

# Business Intelligence (BI) Technologies



# Multidimensional Data Analysis

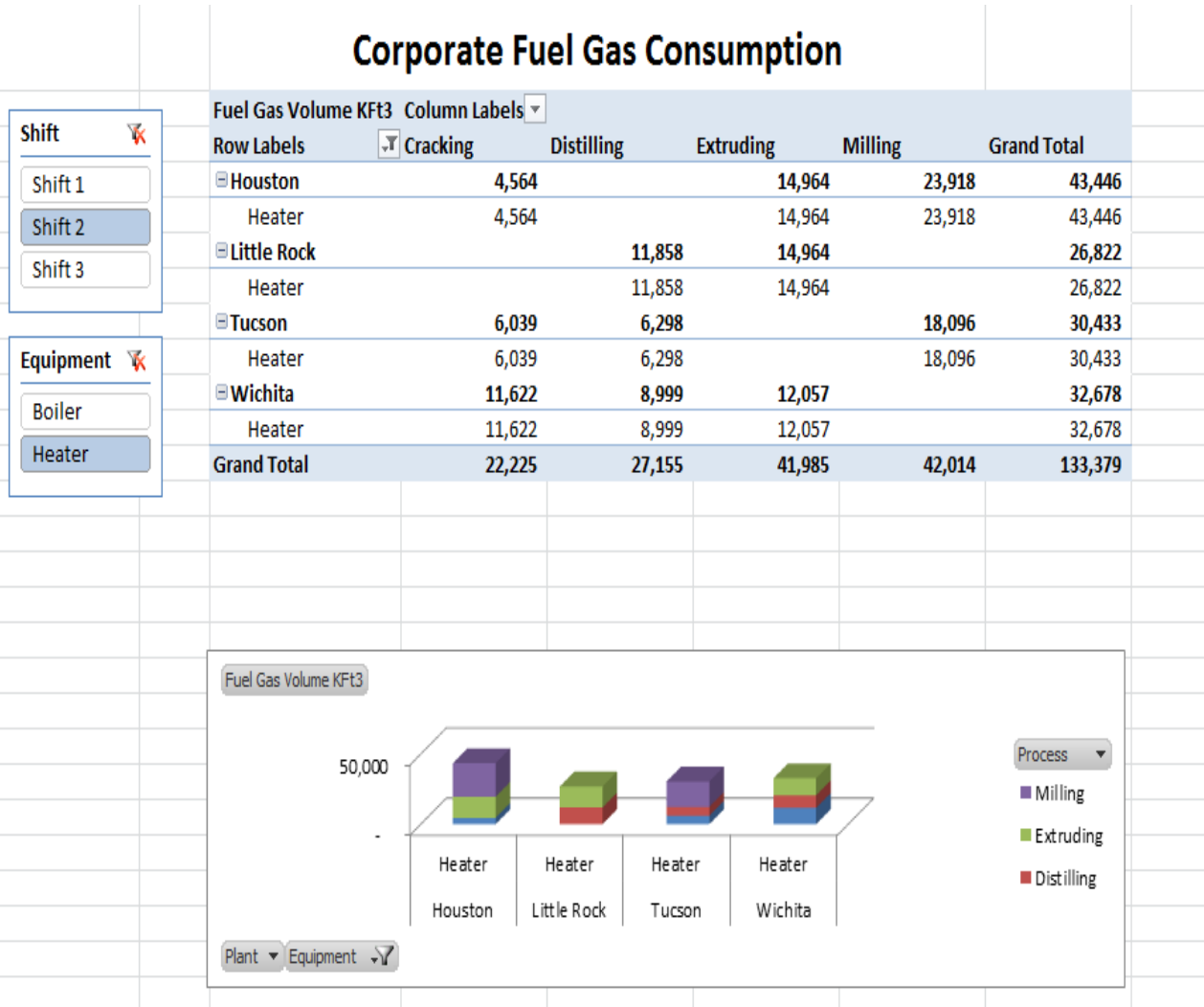
Quick, ad-hoc, aggregation of large amounts of interesting data (facts), based on user-selected criteria (dimensions), to identify opportunities for improvement.



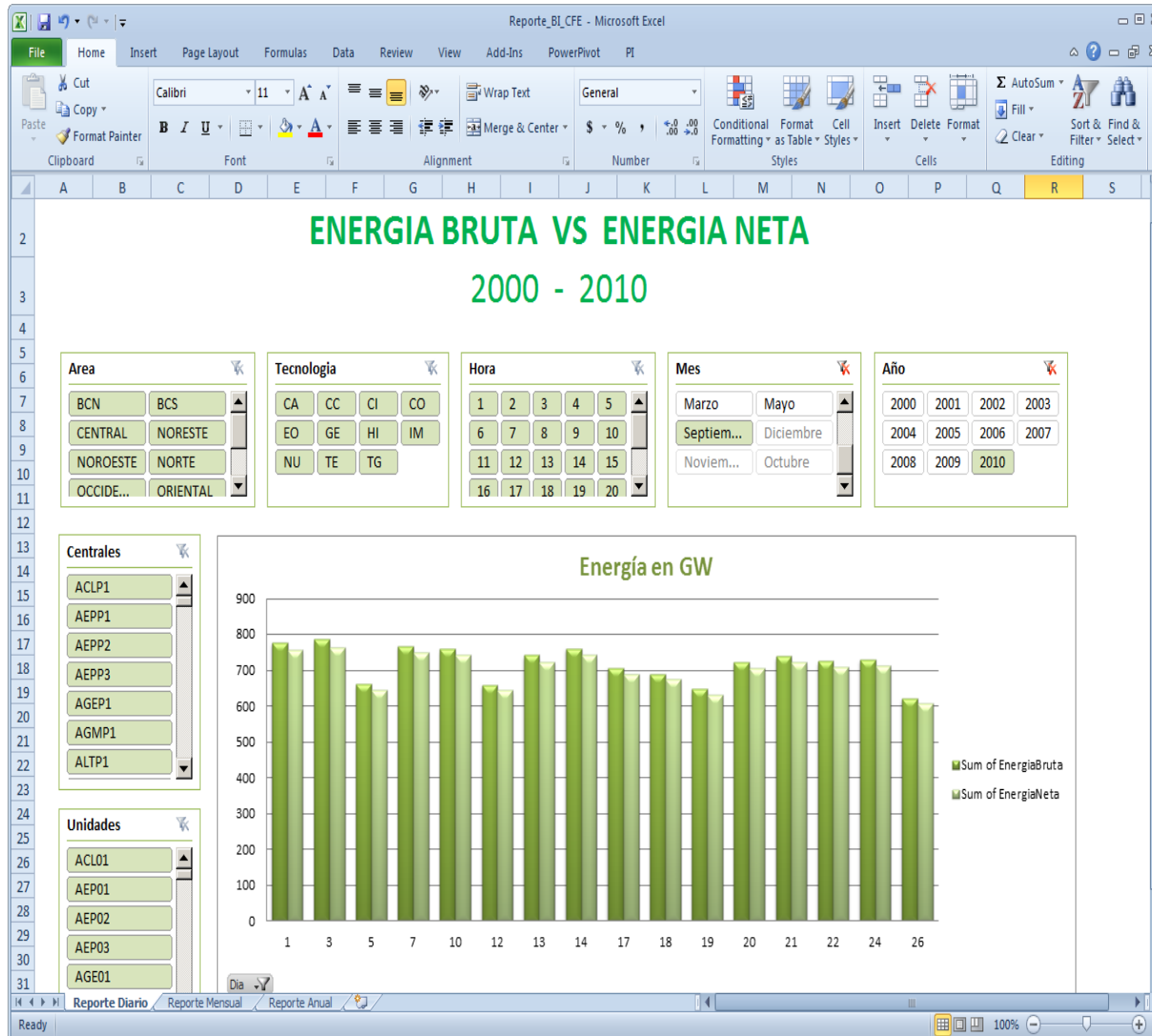
## Critical HX Monitoring

Exchanger	Water		CW Flow	U-Value	Heat	
	Velocity	Skin Temp			Load	Heat Flux
	Feet/Sec	Deg. F	GPM	BTU/(hr/ft2/deg F)	MMBTU	BTU/hr/ft2
E-163-A	3.70	77	2237	45.5	5.1	352.1
E-163-C	3.80	78	2298	48.0	5.8	401.1
E-191-A	2.31	101	4360	62.8	36.6	2782.4
E-191-B	3.08	80	4360	52.1	13.7	1027.2
E-256-A	2.46	97	1726	117.8	6.4	1082.2
E-256-B	2.47	89	1732	130.8	5.4	911.8
E-256-C	2.46	84	1728	141.9	8.0	1362.3
E-271	4.43	132	1930	153.3	40.9	9922.5
E-343	1.79	97	249	63.3	2.6	2443.0
E-38-A	1.81	105	3752	50.9	34.2	2378.9
E-38-B	1.95	82	3731	48.6	13.1	980.1
E-77-A	2.23	105	4204	61.8	36.4	2768.5
E-77-B	2.16	84	4246	57.1	19.0	1391.1
E-98-A	1.58	108	2986	47.3	29.3	2227.0
E-98-B	1.54	86	3013	45.3	15.6	1141.8

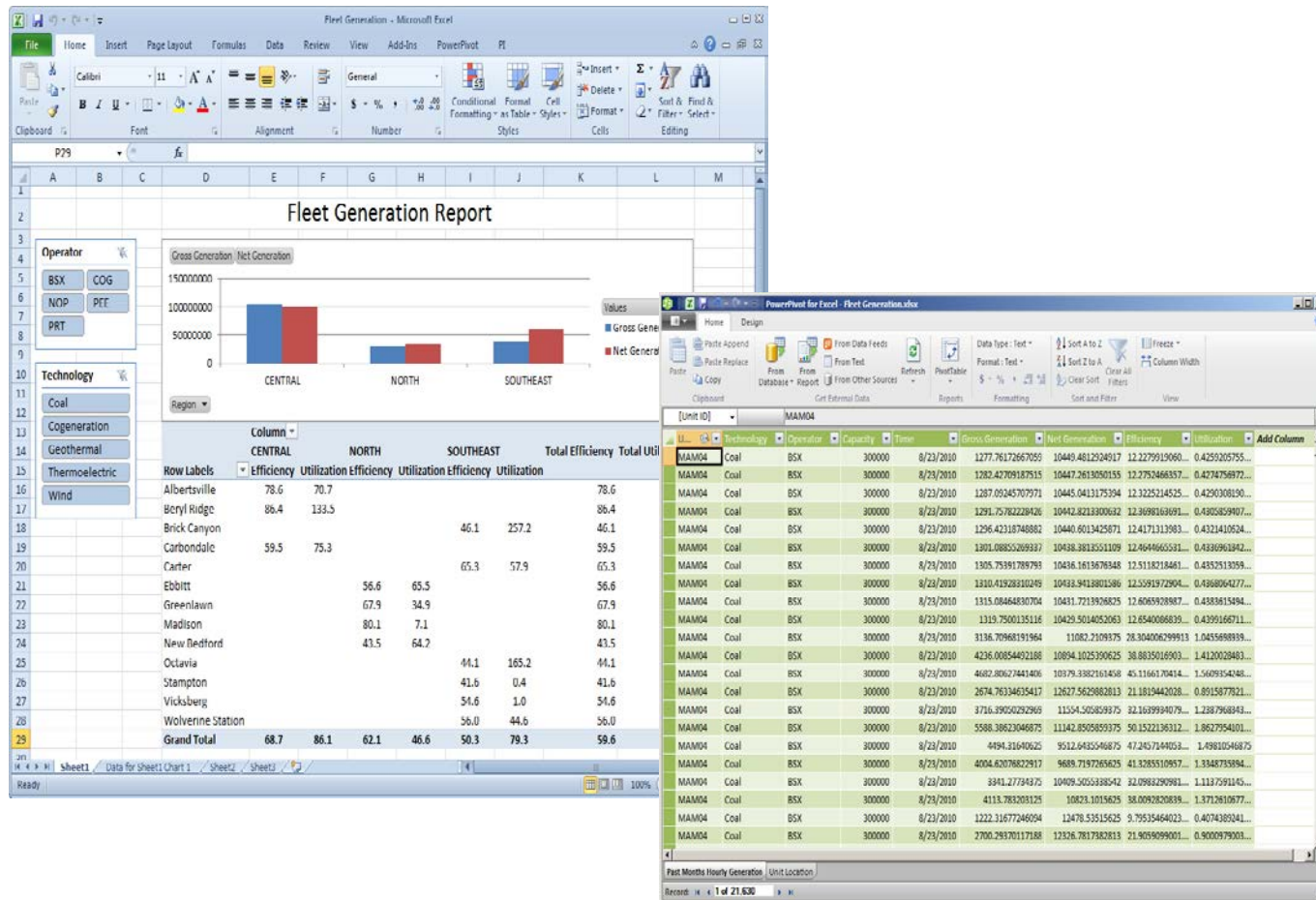
# Operational Intelligence



# Customer Example: CFE Mexico



# Introduction to “Self-Service” BI





# OSIsoft / Microsoft BI Stack

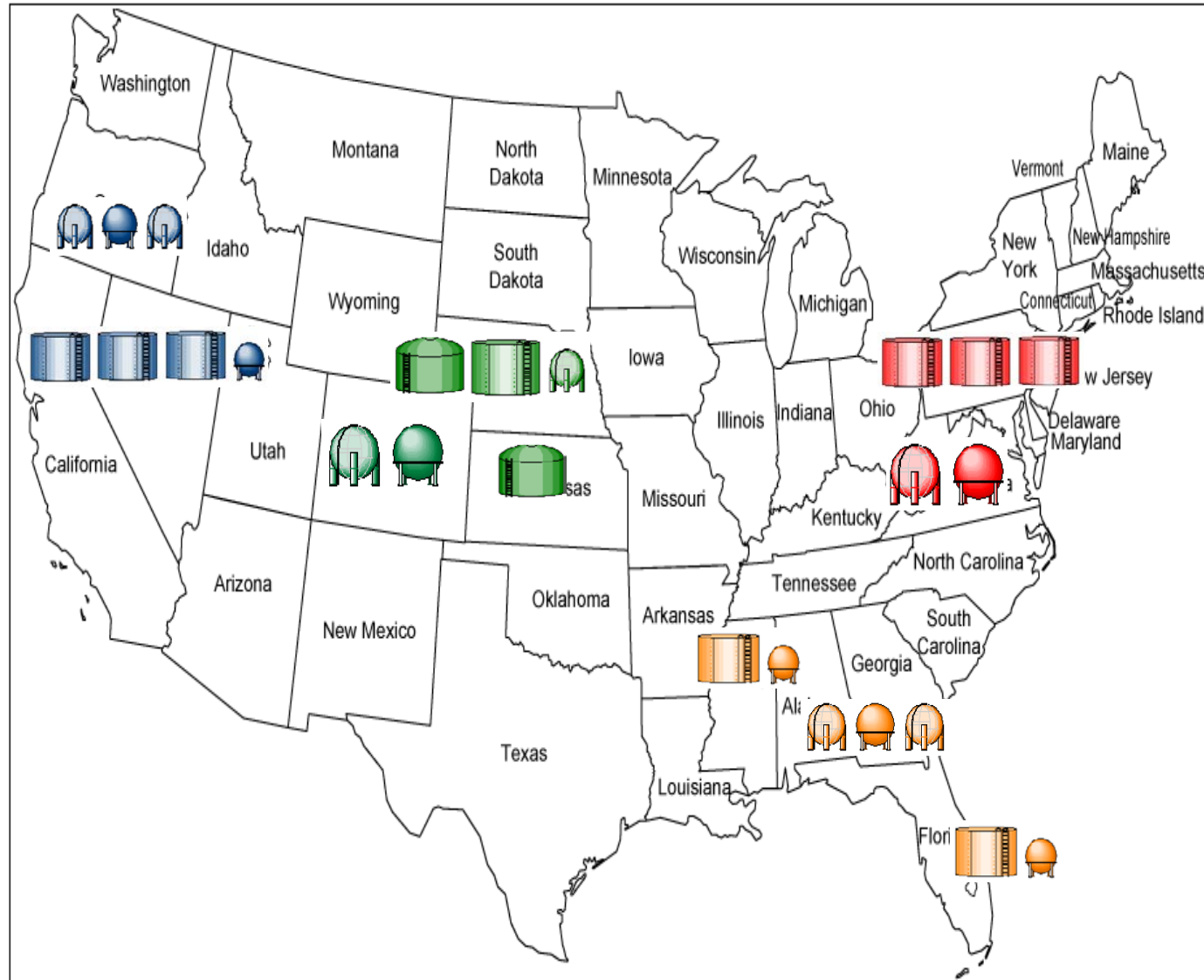




# Self-service BI Toolkit for PI

- Facts and Dimensions
  - PI AF (PI System 2010)
- Datasets for BI Data Extraction
  - PI OLEDB Enterprise 2010 (PI for Office 2010)
- Desktop Analysis and Cube Configuration
  - Microsoft PowerPivot for Excel 2010
- Enterprise Accountability
  - Microsoft PowerPivot for SharePoint 2010
  - Microsoft SharePoint 2010 Enterprise
  - Microsoft SQL Server 2008 R2 Enterprise or above

# Example: Product Inventories



# PI AF Associates Facts and Dimensions

Dimensions

Facts

AF Hierarchy

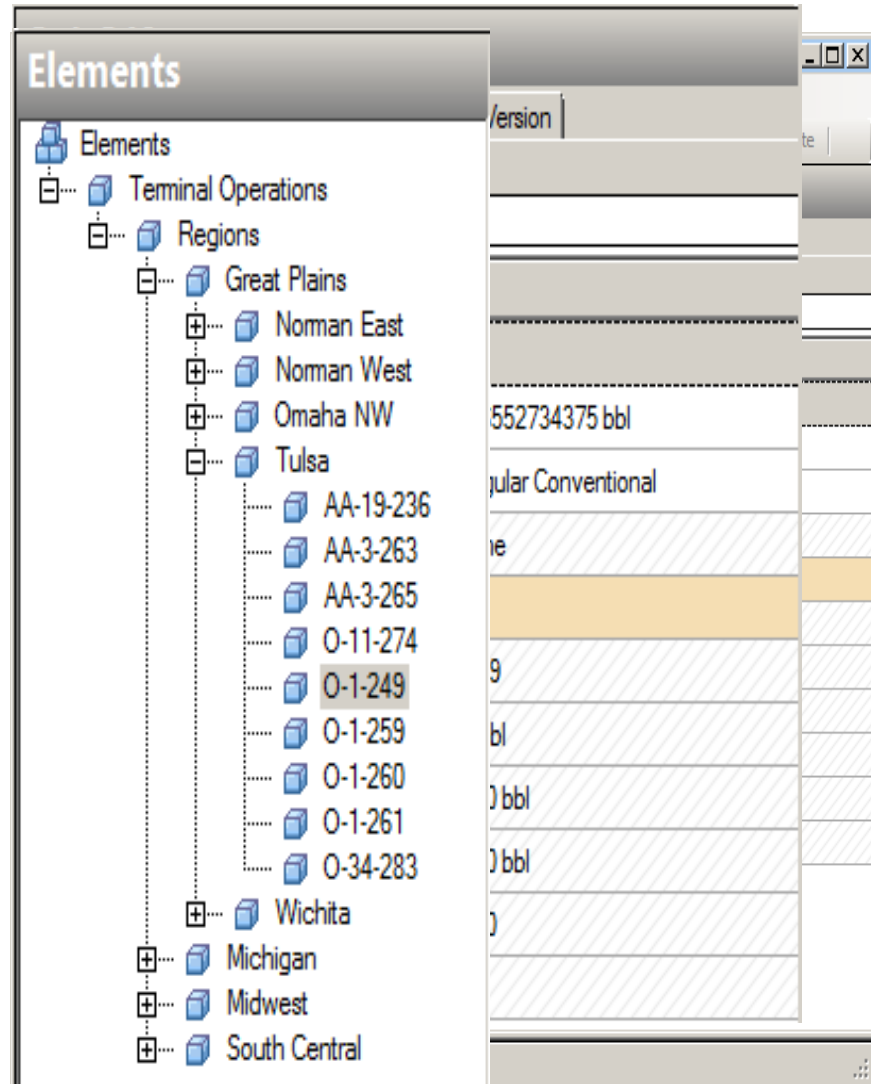
- Region
- Volume
- Terminal
- Product
- Tank
- Formula
- Group

Dimensions

Hierarchy

Templates

Categories



# PI OLEDB Enterprise 2010

Back-Sight  
Accounting

	Tank ID	Time		Tank ID	Type	Region	Terminal	Nominal Volume
000001	T-14	9/20/2010 5:58:..	001	23-373	Tank	Great Plains	Norman East	50250
000002	T-14	9/20/2010 6:58:..	002	12-372	Tank	Great Plains	Norman East	50250
000003	T-14	9/20/2010 7:58:..	003	24-374	Tank	Great Plains	Norman East	50250
000004	T-14	9/20/2010 8:58:..	004	24-375	Tank	Great Plains	Norman East	50250
000005	T-14	9/20/2010 9:58:..	005	24-376	Tank	Great Plains	Norman East	50250
000006	T-14	9/20/2010 10:58:..	006	40-370	Tank	Great Plains	Norman East	50250
000007	T-14	9/20/2010 10:58:..	007	41-371	Tank	Great Plains	Norman East	50250
000008	T-14	9/20/2010 11:58:..	008	52-377	Tank	Great Plains	Norman East	50250
000009	T-14	9/21/2010 12:58:..	009	15-11	Tank	Great Plains	Omaha NW	50250
000010	T-14	9/21/2010 1:58:..	010	35-1	Tank	Great Plains	Omaha NW	50250
000011	T-14	9/21/2010 2:58:..	011	35-2	Tank	Great Plains	Omaha NW	50250
000012	T-14	9/21/2010 3:58:..	012	35-9	Tank	Great Plains	Omaha NW	50250
000013	T-14	9/21/2010 4:58:..	013	55-12	Tank	Great Plains	Omaha NW	50250
000014	T-14	9/21/2010 5:58:..	014	55-3	Tank	Great Plains	Omaha NW	50250
000015	T-14	9/21/2010 6:58:..	015	55-7	Tank	Great Plains	Omaha NW	50250
000016	T-14	9/21/2010 7:58:..	016	80.4	Tank	Great Plains	Omaha NW	50250
000017	T-14	9/21/2010 8:58:..	017	80.6	Tank	Great Plains	Omaha NW	50250
000018	T-14	9/21/2010 9:58:..	018	T-1-3	Tank	Great Plains	Omaha NW	50250
			019	AA-10-2	Tank	Great Plains	Omaha NW	50250
			020	T-8-1	Tank	Great Plains	Omaha NW	50250
			021	RB-10-1	Tank	Great Plains	Omaha NW	50250
			022	AA-19-236	Tank	Great Plains	Tulsa	50250

Ready

Ch 1

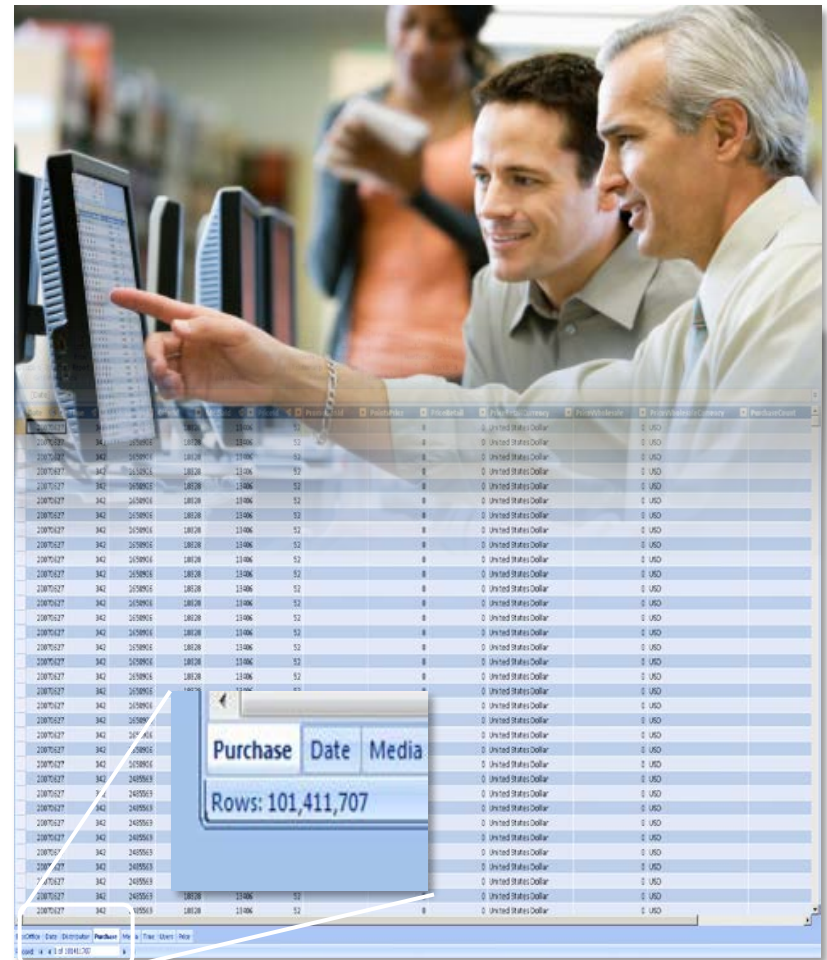
INS

# Introducing PowerPivot for Excel 2010

Microsoft®  
Excel 2010

## Empowering The End User

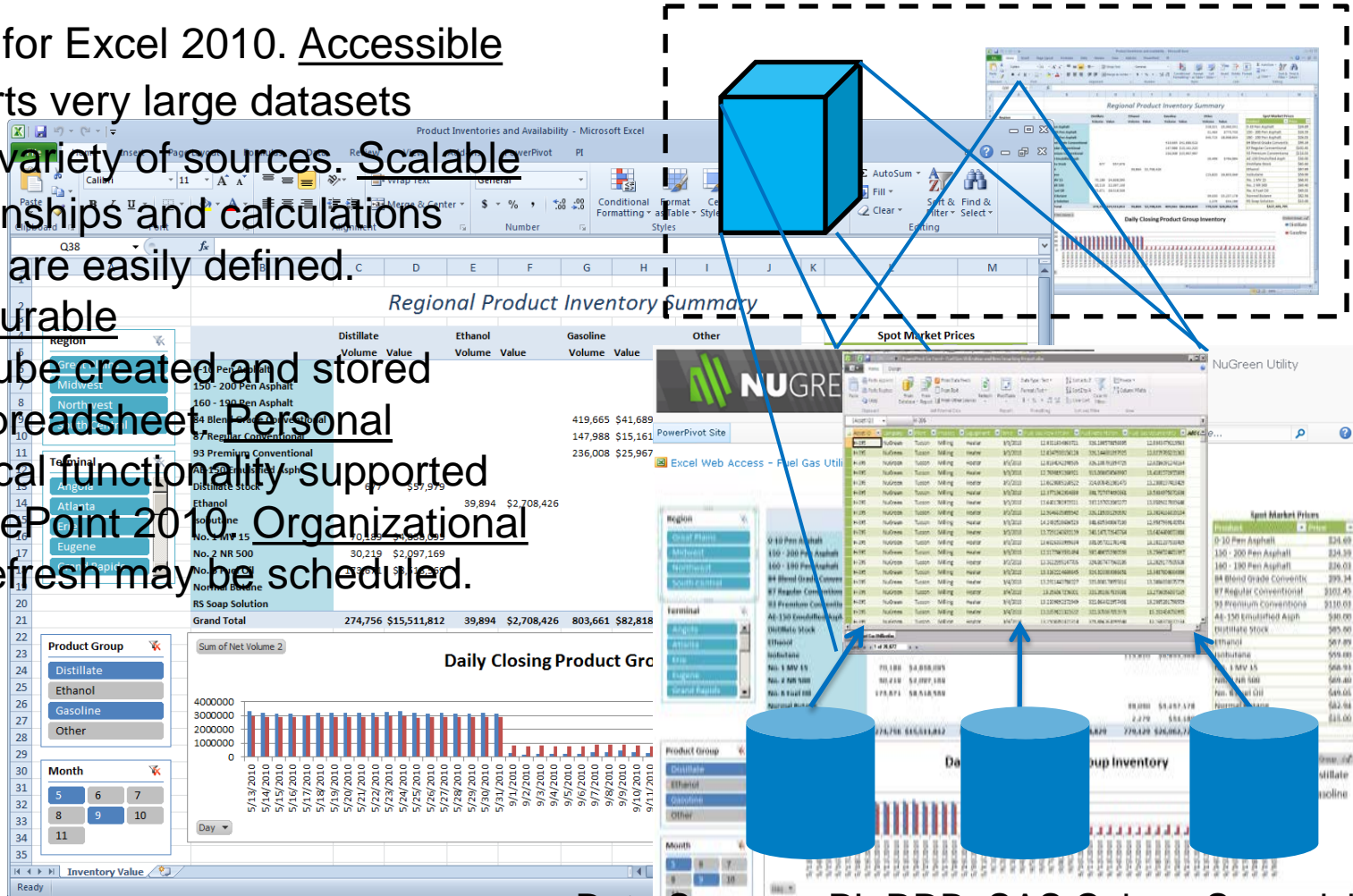
- Enable users to perform self-service analysis and intuitively build their own BI solutions
- Allow users to interactively explore and perform calculations on large data sets
- Integrate data from multiple sources
- Minimize dependence on IT support





# Microsoft PowerPivot for Excel 2010

- Add-In for Excel 2010. Accessible
- Supports very large datasets
- Relationships and calculations (DAX<sup>1</sup>) are easily defined. Scalable
- Configurable
- Data cube created and stored with spreadsheet. Personal
- Analytical functionality supported in SharePoint 2010. Organizational
- Data refresh may be scheduled. Timely

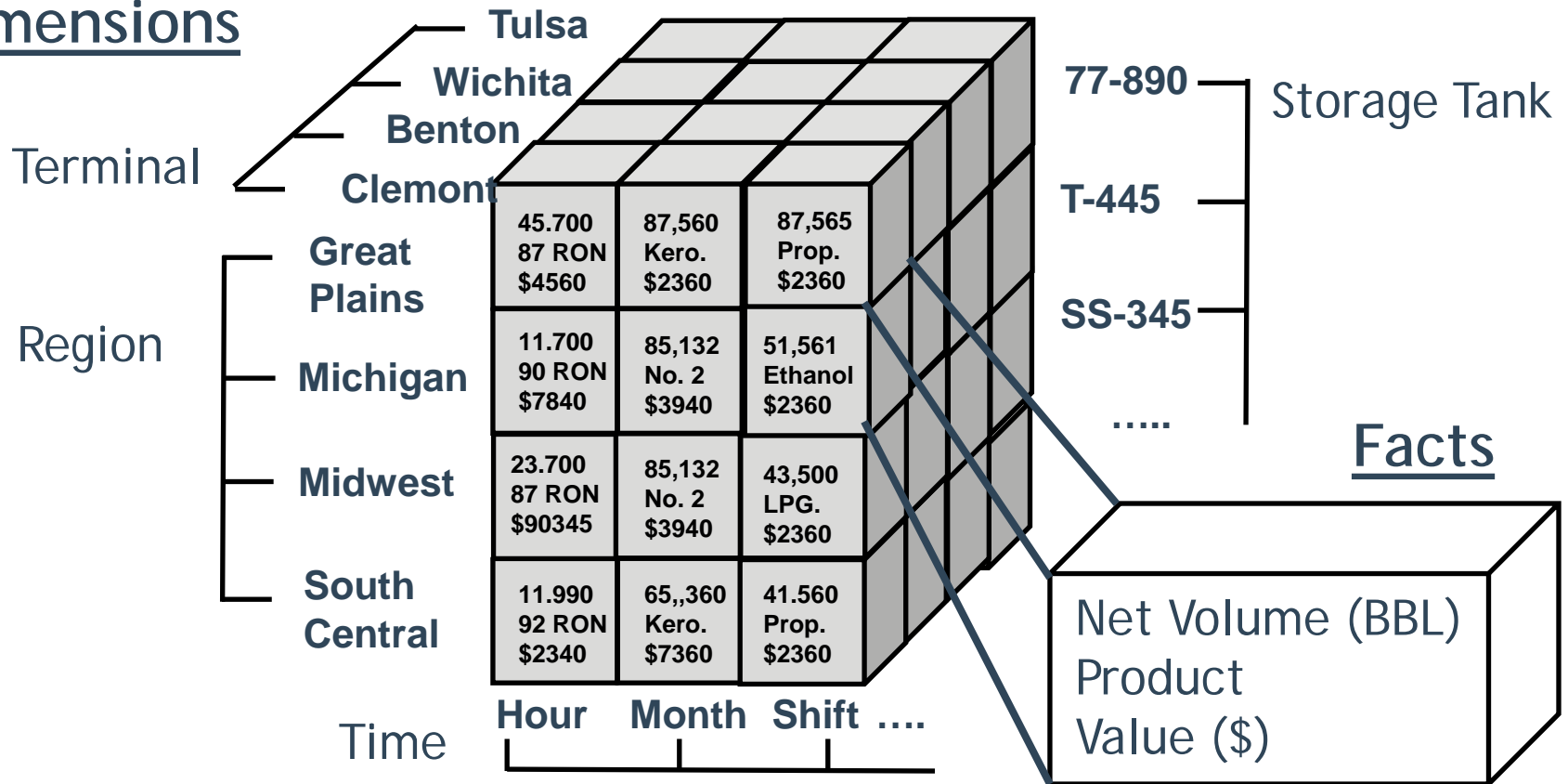


Data Sources: PI, RDB, SAS Cubes, Spreadsheet

1. Data Analysis Expression Language

# Multidimensional Data “Cube”


## Dimensions






# Example Walk Through

## Regional Product Inventory Summary

Region


Great Plains
Midwest
Northwest
South Central

Terminal


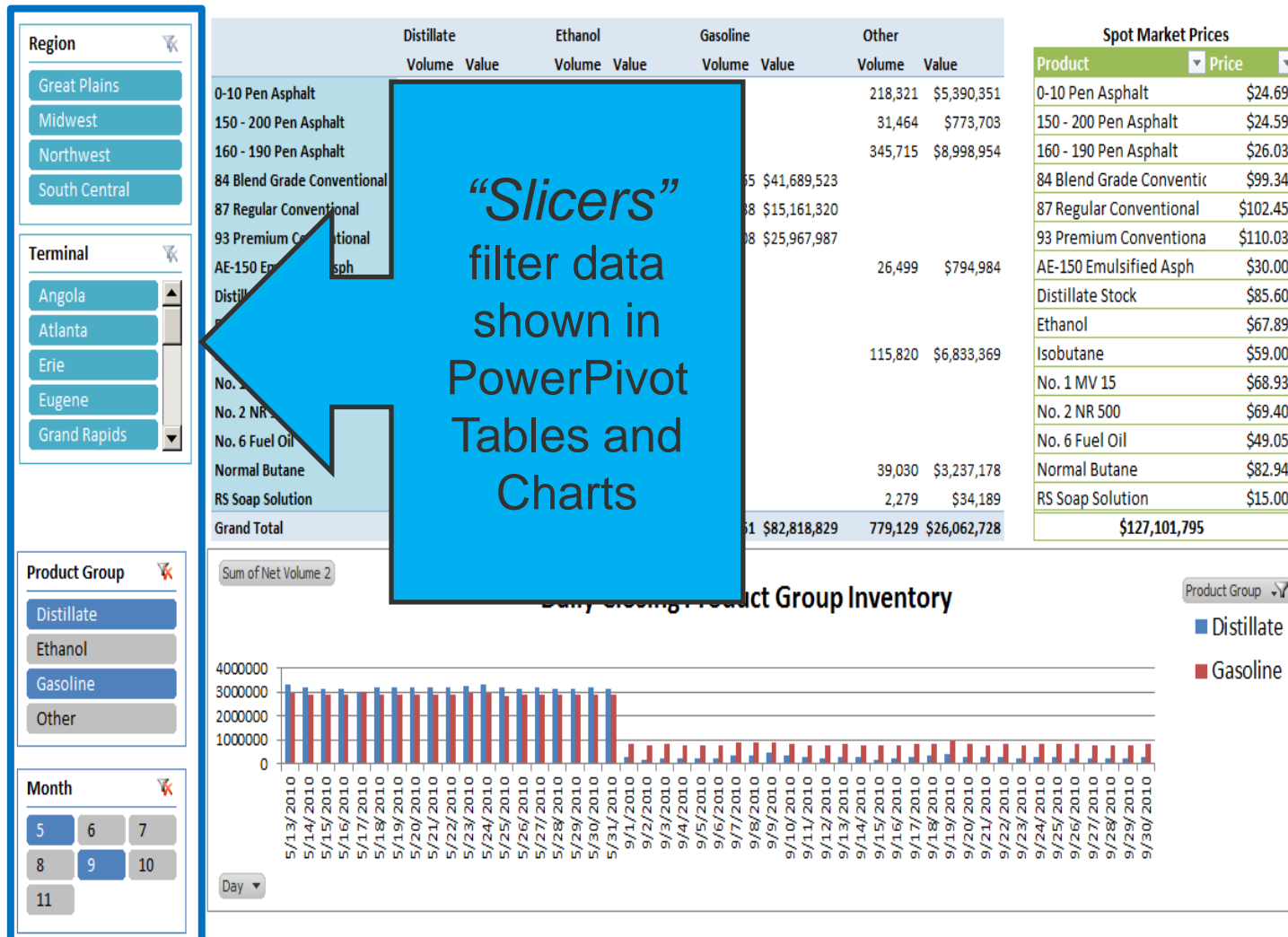
Norman East
Norman West
Omaha NW
Tulsa
Wichita

	Distillate		Ethanol		Gasoline		Other	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
0-10 Pen Asphalt							1,059	\$26,139
150 - 200 Pen Asphalt							12,737	\$313,195
160 - 190 Pen Asphalt							18,736	\$487,711
84 Blend Grade Conventional					3,451	\$342,778		
87 Regular Conventional					14,256	\$1,460,555		
93 Premium Conventional					13,154	\$1,447,356		
AE-150 Emulsified Asph								
Distillate Stock								
Ethanol			5,423	\$368,142				
Isobutane							104,040	\$6,138,333
No. 1 MV 15								
No. 2 NR 500								
No. 6 Fuel Oil	128,444	\$6,300,192						
Normal Butane								
RS Soap Solution								
Grand Total	128,444	\$6,300,192	5,423	\$368,142	30,861	\$3,250,690	136,571	\$6,965,378

Spot Market Prices	
Product	Price
0-10 Pen Asphalt	\$24.69
150 - 200 Pen Asphalt	\$24.59
160 - 190 Pen Asphalt	\$26.03
84 Blend Grade Conventic	\$99.34
87 Regular Conventional	\$102.45
93 Premium Conventiona	\$110.03
AE-150 Emulsified Asph	\$30.00
Distillate Stock	\$85.60
Ethanol	\$67.89
Isobutane	\$59.00
No. 1 MV 15	\$68.93
No. 2 NR 500	\$69.40
No. 6 Fuel Oil	\$49.05
Normal Butane	\$82.94
RS Soap Solution	\$15.00
\$16,884,402	

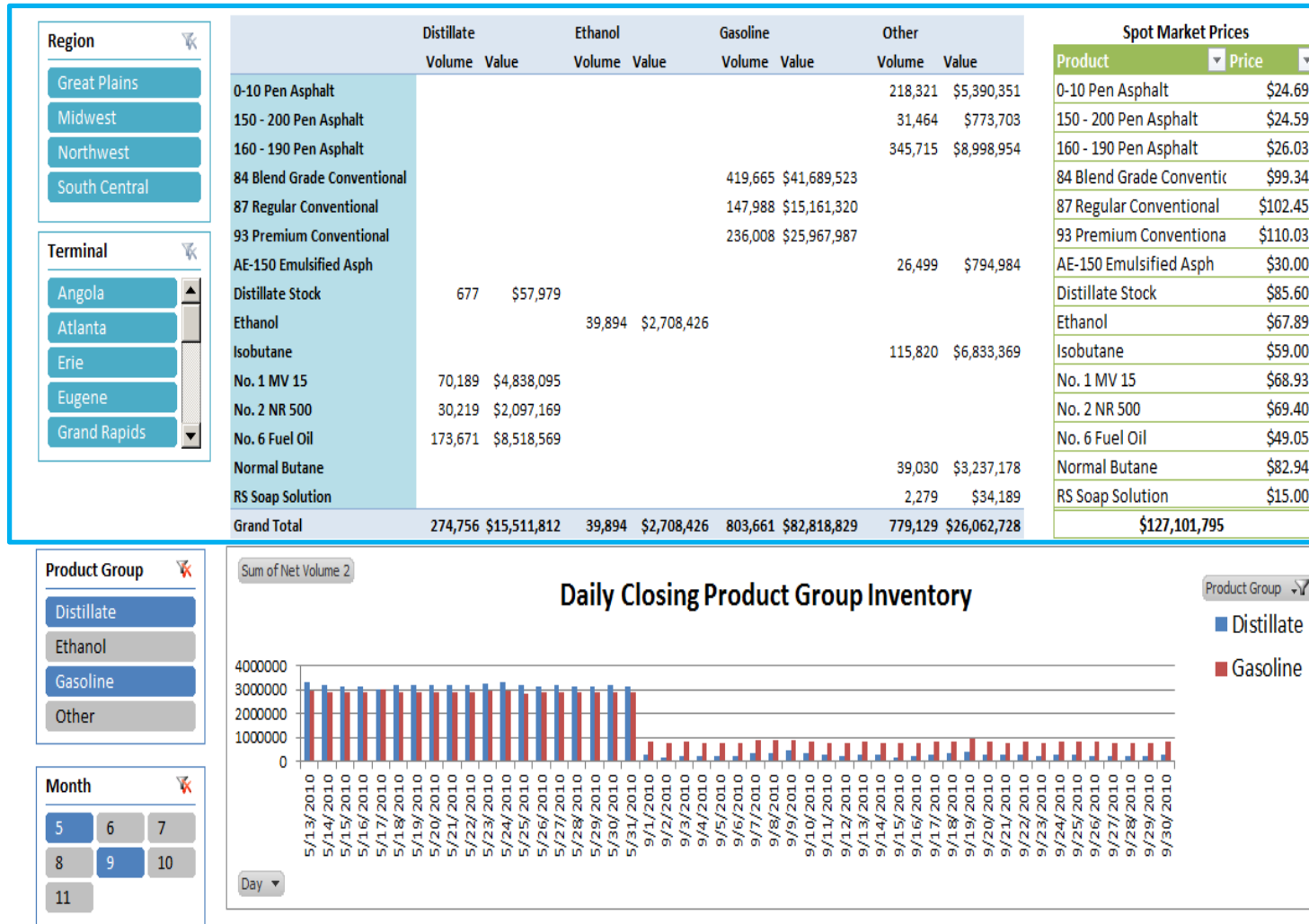
# Product Inventories and Valuation

## Regional Product Inventory Summary



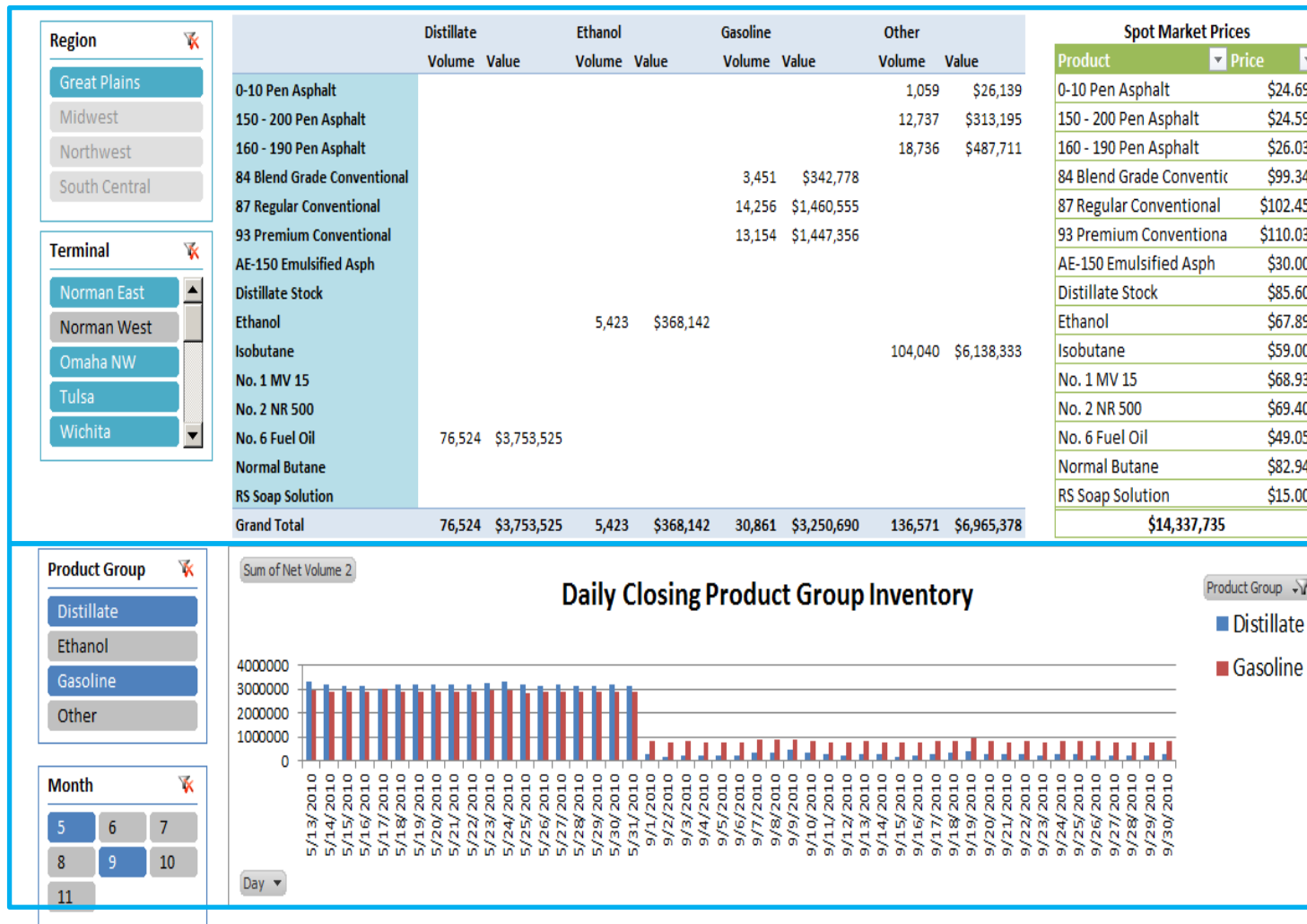
# Product Inventories and Valuation

## Regional Product Inventory Summary



# Product Inventories and Valuation

## Regional Product Inventory Summary



**Product Group**

Distillate

Ethanol

Gasoline

Other

**Month**

5 6 7

8 9 10

11

Sum of Net Volume: 2

**Daily Closing Product Group Inventory**

Product Group

Distillate

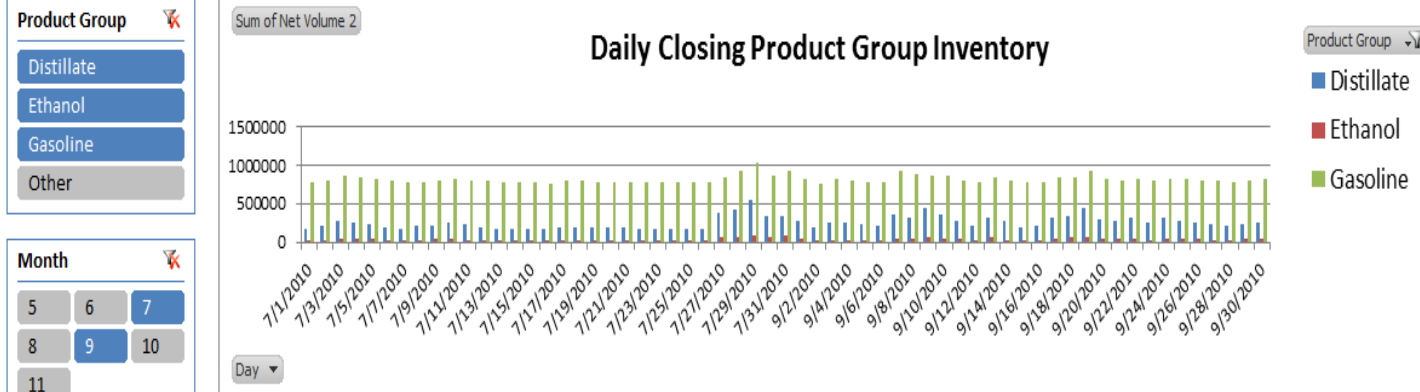
Gasoline

Day

# Product Inventories and Valuation

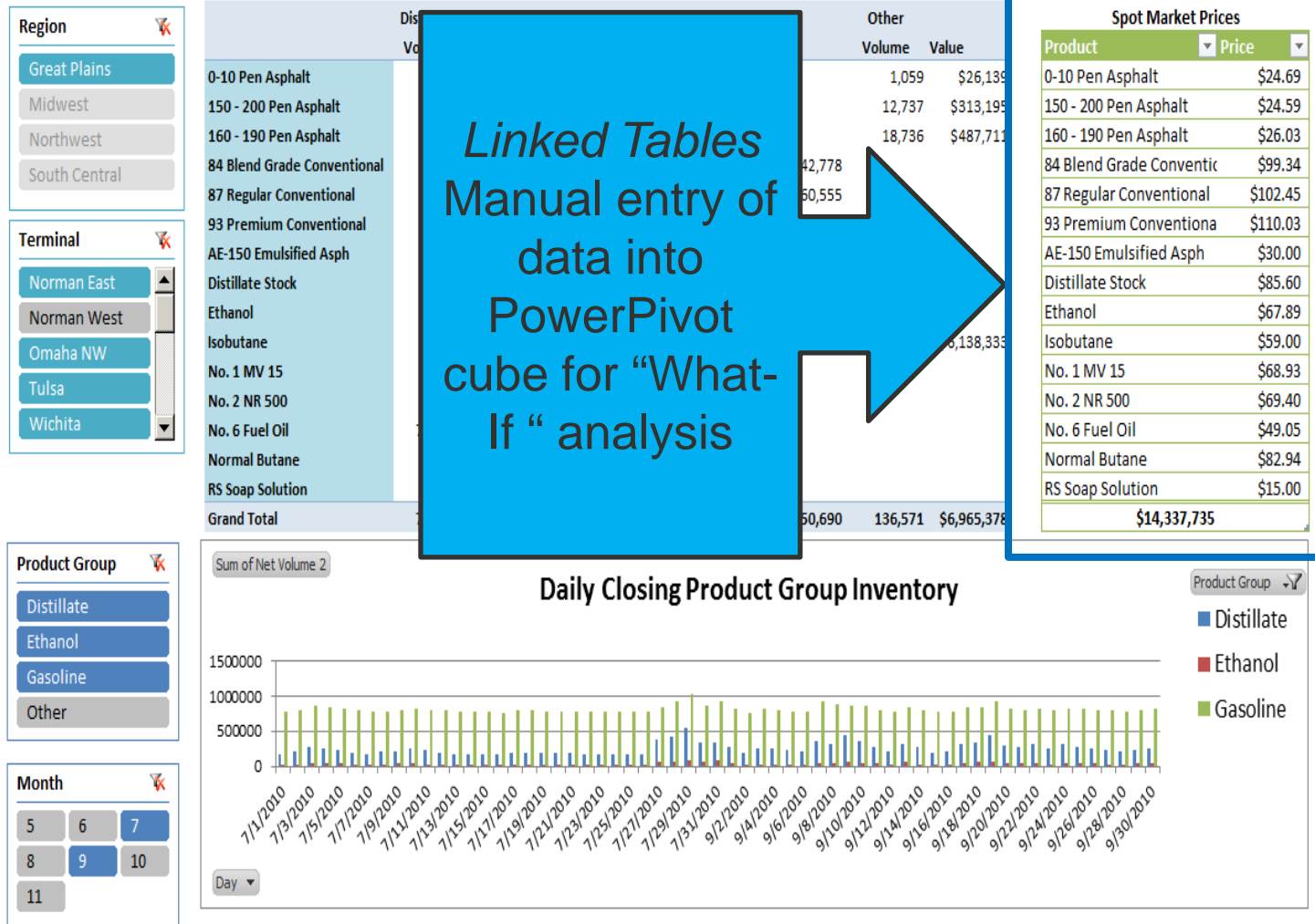
## Regional Product Inventory Summary

Region		Distillate		Ethanol		Gasoline		Other		Spot Market Prices	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value	Product	Price
Great Plains		0-10 Pen Asphalt						1,059 \$26,139		0-10 Pen Asphalt \$24.69	
Midwest		150 - 200 Pen Asphalt						12,737 \$313,195		150 - 200 Pen Asphalt \$24.59	
Northwest		160 - 190 Pen Asphalt						18,736 \$487,711		160 - 190 Pen Asphalt \$26.03	
South Central		84 Blend Grade Conventional				3,451 \$342,778				84 Blend Grade Conventic \$99.34	
		87 Regular Conventional				14,256 \$1,460,555				87 Regular Conventional \$102.45	
		93 Premium Conventional				13,154 \$1,447,356				93 Premium Conventiona \$110.03	
		AE-150 Emulsified Asph								AE-150 Emulsified Asph \$30.00	
		Distillate Stock								Distillate Stock \$85.60	
		Ethanol		5,423 \$368,142						Ethanol \$67.89	
		Isobutane						104,040 \$6,138,333		Isobutane \$59.00	
		No. 1 MV 15								No. 1 MV 15 \$68.93	
		No. 2 NR 500								No. 2 NR 500 \$69.40	
		No. 6 Fuel Oil		76,524 \$3,753,525						No. 6 Fuel Oil \$49.05	
		Normal Butane								Normal Butane \$82.94	
		RS Soap Solution								RS Soap Solution \$15.00	
Grand Total		76,524	\$3,753,525	5,423	\$368,142	30,861	\$3,250,690	136,571	\$6,965,378	\$14,337,735	



# Product Inventories and Valuation

## Regional Product Inventory Summary



# Import Data into PowerPivot

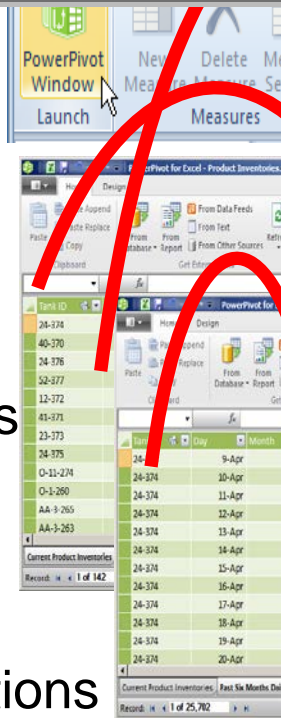
='Current Product Inventories'[Net Volume]\*RELATED(Product\_Prices[Price])

PowerPivot  
Add-In for  
Excel 2010

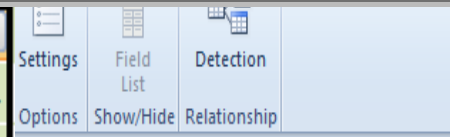
Configure  
Relationships

Add Calculations  
Using DAX<sup>1</sup>

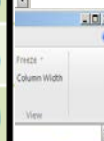
1. Data Analysis Expression Language



Value
\$152,661.44
\$226,440.90
\$84,130.78
\$126,491.38
\$863,093.15
\$180,081.09
\$107,543.63
\$112,970.57
\$290,407.91
\$442,314.19
\$205,521.74
\$405,515.56
\$63,987.56
\$1,266,947.89



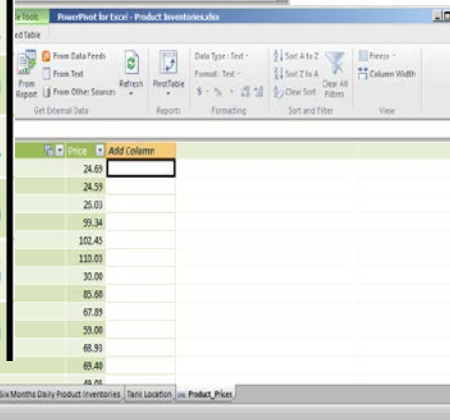
**Current Product Inventories**  
PI OLEDB Enterprise 2010



**Six Months Daily Inventories**  
PI OLEDB Enterprise 2010



**Tank Location**  
PI OLEDB Enterprise 2010



**Commodity Prices**  
Excel Linked Table

# Build PowerPivot Tables and Charts

The screenshot displays the Microsoft Excel interface with the PowerPivot task pane open. The task pane is divided into several sections:

- Slicers Vertical:** Contains two dropdown menus for 'Region' and 'Terminal'.
- Slicers Horizontal:** An empty box for horizontal slicers.
- Report Filter:** An empty box for report filters.
- Column Labels:** Contains a dropdown menu for 'Commodity Group'.
- Row Labels:** Contains a dropdown menu for 'Commodity'.
- Values:** Contains a dropdown menu for 'Sum of Nominal Volume'.

The left sidebar shows the 'Region' and 'Terminal' filters. The 'Region' filter is expanded, showing a list of regions: Great Plains, Midwest, Northwest, and South Central. The 'Terminal' filter is also expanded, showing a list of terminals: Angola, Atlanta, Erie, Eugene, Grand Rapids, Madison, Nashville, Norman East, Norman West, and Omaha NW.

The bottom right of the task pane shows a preview of the data table, with columns for 'Product Group' and 'Sum of Met. Volume'.



# SharePoint 2010 Enterprise

Site Actions | Library Tools | Documents | Library | Curt Hertler

More Eyes on PI | PowerPivot Gallery

Share a document with the team by adding it to this document library.

More Eyes on PI | Search this site...

Libraries

- San Leandro Building HVAC Project Dashboards
- Shared Documents
- PowerPivot Gallery
- San Leandro Building HVAC Project Documents
- OSIsof IT

Lists

- Calendar
- Tasks

Discussions

- Team Discussion

Sites

- People and Groups

Site Content

- OSIsof IT
- Processbook Display
- San Leandro Building HVAC Project Documents
- Shared Documents
- Site Assets

## Product Inventories

Last Modified By: David Black, Date: 11/17/2010  
Created By: Curt Hertler

Inventory Value

Fuel Gas Use

Regional Product Inventory Summary

Daily Closing Product Group Inventory

More Eyes on PI | PowerPivot Gallery | Product Inventories.xlsx

Microsoft Excel Web App

File | Open in Excel | Edit in Browser | Data | Find

### Regional Product Inventory Summary

Region	Distillate		Ethanol		Gasoline		Other		Spot Market Prices	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Product	Price
Great Plains									0-10 Pen Asphalt	\$ 0.01
Midwest									150 - 200 Pen Asphalt	\$ 24.59
Northwest									160 - 190 Pen Asphalt	\$ 26.03
South Central									84 Blend grade Conventic	\$ 99.34
									87 Regular Conventional	\$ 102.45
									93 Premium Conventional	\$ 110.03
									AE-150 Emulsified Asph	\$ 30.00
									Distillate Stock	\$ 86.50
									Ethanol	\$ 67.89
									Isobutane	\$ 59.06
									No. 1 MV 15	\$ 68.93
									No. 2 NR 500	\$ 69.40
									No. 6 Fuel Oil	\$ 40.05
									Normal Butane	\$ 82.94
									RS Soap Solution	\$ 15.00
Grand Total	274,756	\$15,512,394	39,894	\$2,708,422	803,661	\$82,818,749	779,129	\$20,681,431		\$121,720,996

### Daily Closing Product Group Inventory

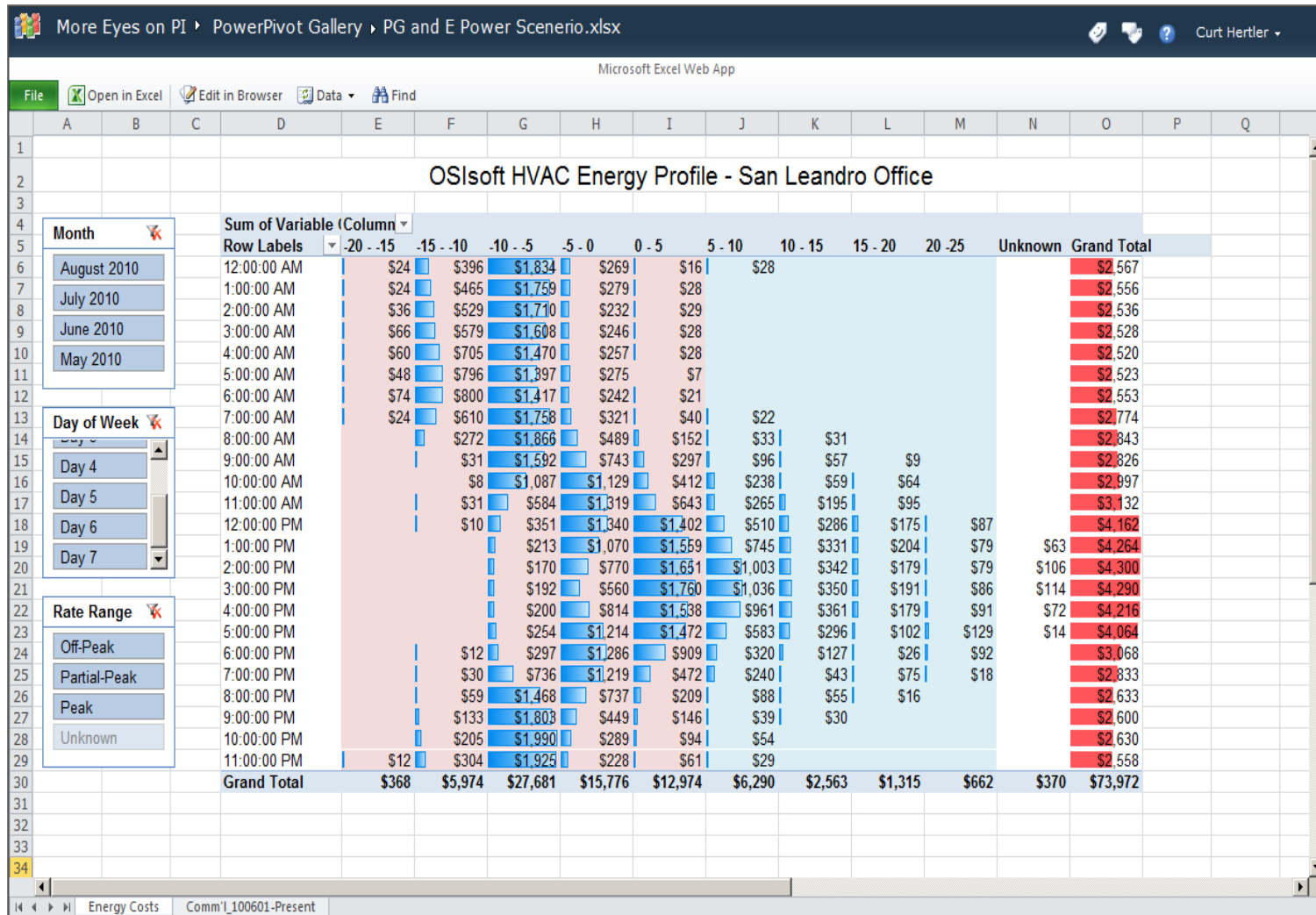
Bar chart showing inventory levels for Distillate and Gasoline over time.

# Other Examples and Additional Information

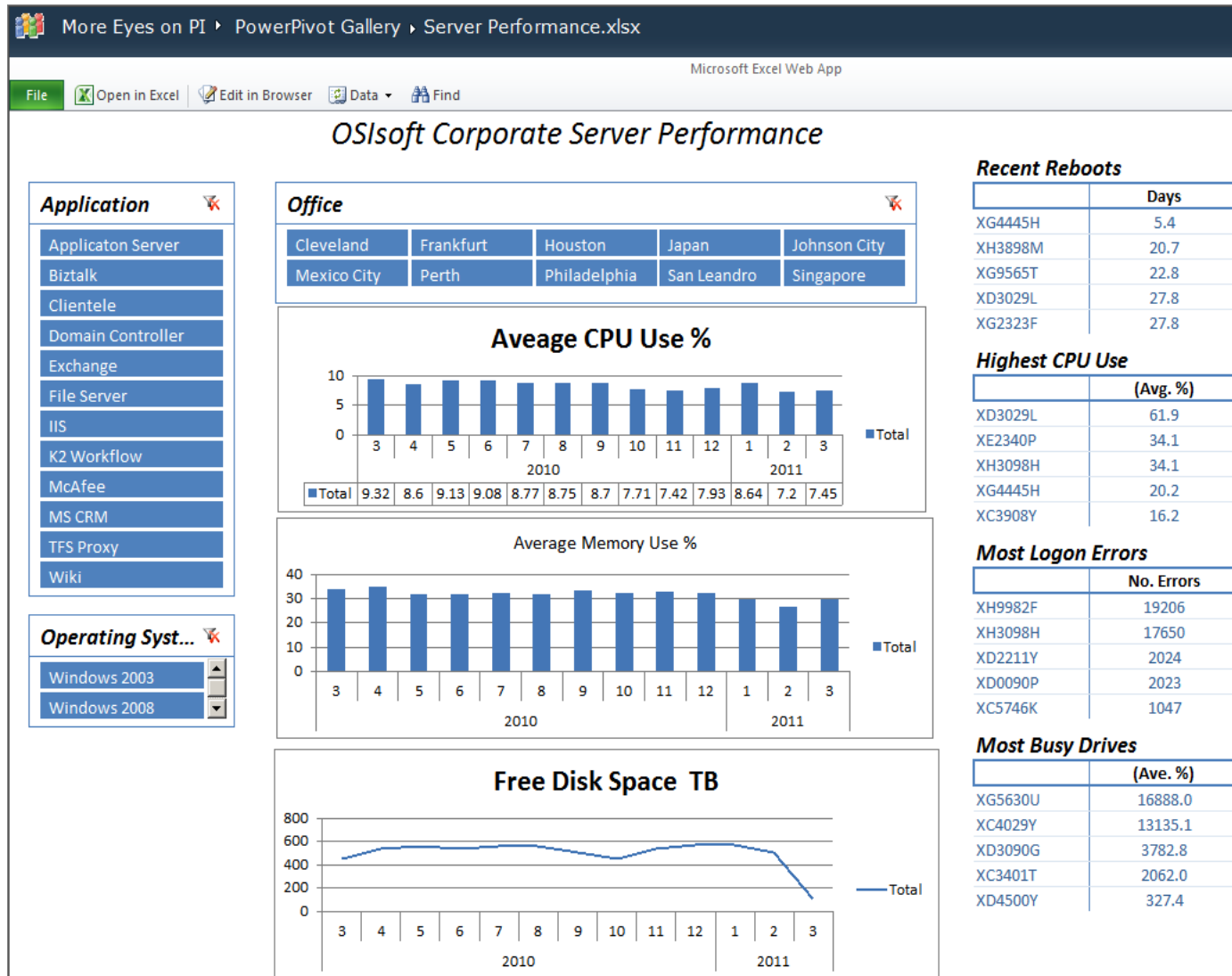


WWW.PowerPivot.com

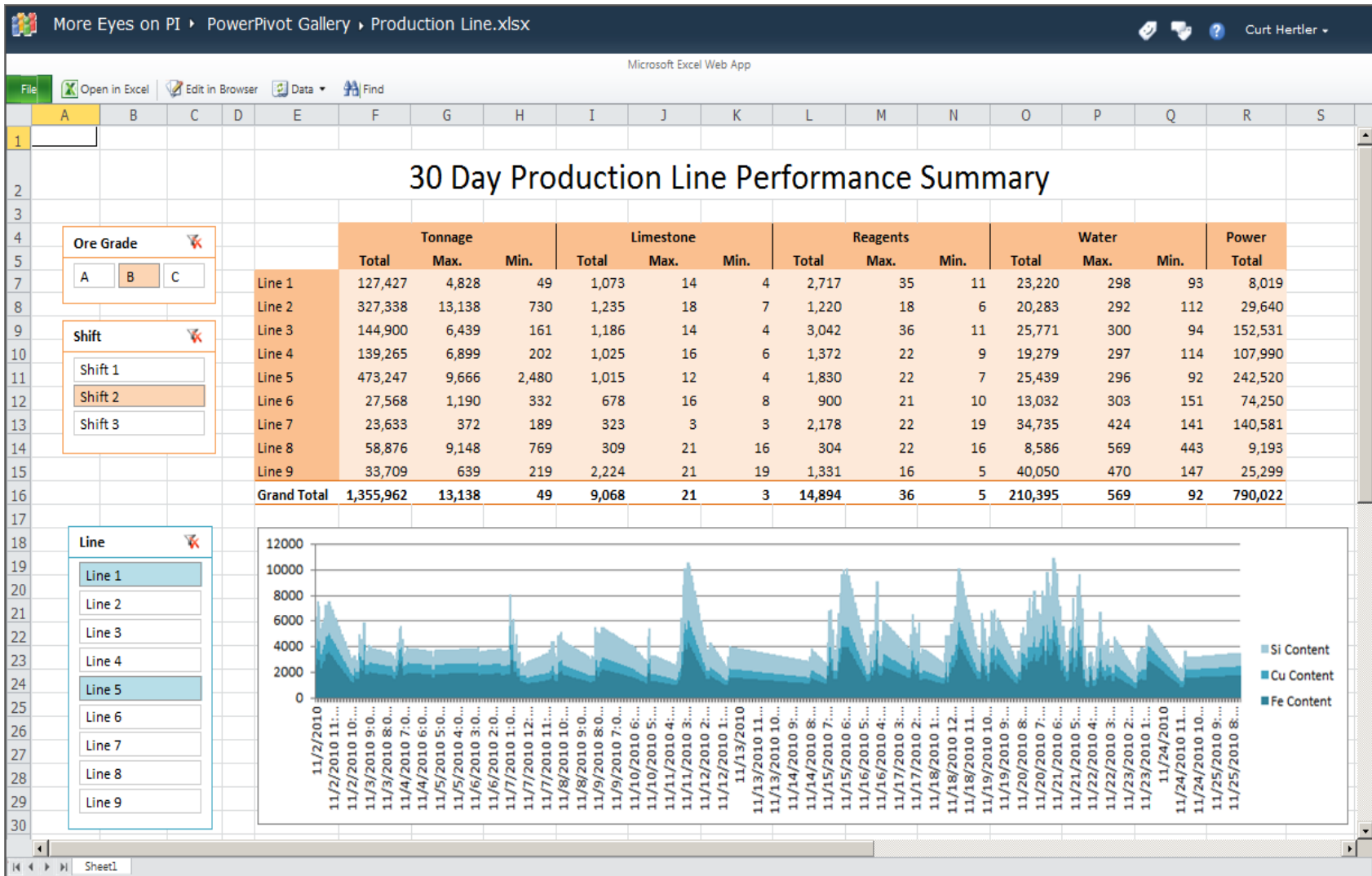
# Performance Profiling



# Historical Analytics



# Feedstock Analysis



# Energy Benchmarking

## Refinery Process Energy Performance

### Fuel Gas

Month 

1

2

3

4


10

11

12

	Cadereyta		Madero		Minatitlan		Salamanca		Salina Cruz		Tula				
	Fuel Gas	KPI	Fuel Gas	KPI	Fuel Gas	KPI	Fuel Gas	KPI	Fuel Gas	KPI	Fuel Gas	KPI			
Atmospheric Distillati	51,793		360	224,972	6,280	134,225		1,420	68,806		705	64,844	178	56,494	324
Catalytic Cracking	278,199		1,935	58,958	1,644	115,170		621	105,801		290	233,786	1,695	48,949	180
Coking	63,198		640	313,243	4,371	369,317		1,993	152,723		419	158,108	573	112,668	667
Naphtha Reforming	399,678		1,390	201,529	2,810	355,541		1,880	114,363		585	257,313	738	111,692	810
Vacuum Distillation	268,052		2,718	64,796	1,808	268,052		1,447	47,502		130	116,704	670	95,232	691
Grand Total	1,060,919		1,405	863,497	3,442	1,242,304		1,540	489,195		452	830,754	738	425,036	534

### Power

Crude 

ISMO

MAYA

OLMECA

	Cadereyta			Madero			Minatitlan			Salamanca			Salina Cruz			Tula			
	Power	KPI		Power	KPI		Power	KPI		Power	KPI		Power	KPI		Power	KPI		
Alkylation	47,596	<div></div>		166	40,324	<div></div>	204	26,642	<div></div>	141	49,667	<div></div>	254	31,515	<div></div>	90	36,495	<div></div>	108
Atmospheric Distillati	19,646	<div></div>		137	17,576	<div></div>	491	12,693	<div></div>	134	46,605	<div></div>	478	21,618	<div></div>	59	17,465	<div></div>	100
Hydrodesulfurization	19,640	<div></div>		137	15,497	<div></div>	433	14,461	<div></div>	78	34,161	<div></div>	94	18,606	<div></div>	135	10,306	<div></div>	38
Isomerization	68,325	<div></div>		346	36,169	<div></div>	505	29,858	<div></div>	81	25,078	<div></div>	34	26,840	<div></div>	97	34,935	<div></div>	103
Naphtha Reforming	17,571	<div></div>		122	15,502	<div></div>	433	17,568	<div></div>	186	17,571	<div></div>	180	19,649	<div></div>	113	17,568	<div></div>	127
Vacuum Distillation	17,571	<div></div>		178	15,803	<div></div>	441	18,404	<div></div>	99	17,463	<div></div>	48	30,017	<div></div>	172	19,644	<div></div>	142
Viscosity Reduction	41,429	<div></div>		420	27,836	<div></div>	295	23,793	<div></div>	244	18,398	<div></div>	51	36,240	<div></div>	263	34,167	<div></div>	126
Grand Total	231,778			224	168,707		390	143,418		132	208,944		159	184,485		124	170,579		106

### Steam

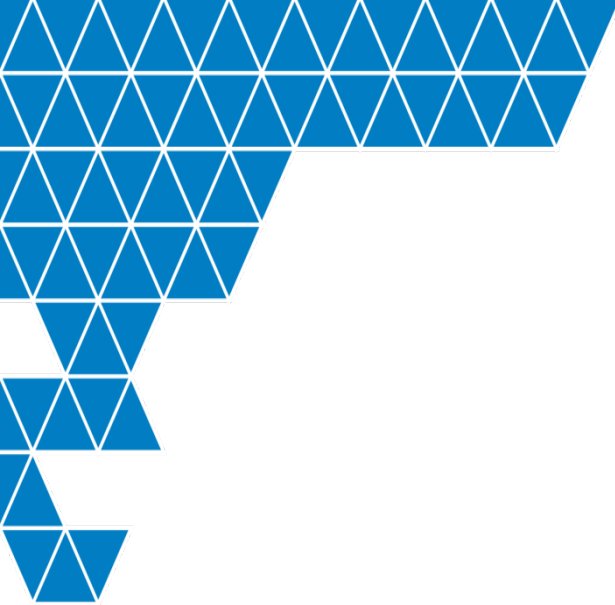
	Cadereyta		Madero		Minatitlan		Salamanca		Salina Cruz		Tula	
	Steam	KPI	Steam	KPI	Steam	KPI	Steam	KPI	Steam	KPI	Steam	KPI
Catalytic Cracking	83,054	2,496,184	5,411	648,901	78,735	1,836,299	31,168	369,676	50,343	1,576,865	30,968	492,846
Hydrodesulfurization	83,147	2,499,231	39,974	4,819,694	130,631	3,046,725	61,698	731,795	83,107	2,603,643	87,594	1,394,113
Isomerization	65,913	2,887,268	22,777	2,745,139	22,517	525,042	87,419	1,036,924	66,069	2,069,844		
Naphtha Reforming	48,691	1,463,163	117,843	14,213,667	97,717	4,466,824	48,640	2,151,786	100,362	2,488,704	61,674	1,931,916
Grand Total	280,805	9,345,846	186,004	22,427,401	329,601	9,874,891	228,925	4,290,180	299,880	8,739,056	180,236	3,818,875





# Additional Resources

- OSIssoft Resources
  - Recorded vCampus Presentations
  - “Personal BI with PI DataLink and Office 2010”
  - “Building a BI Infrastructure Part 1: Warehousing, ETL, and Cube Building”
  - “Building a BI Infrastructure Part 2: Visualization, Analysis, and Personalization”
  - Prescriptive Architecture Guides
- Microsoft Resources
  - PowerPivot ([www.PowerPivot.com](http://www.PowerPivot.com))
  - CFE Case Study ([www.microsoft.com/casestudies/Microsoft-Sharepoint-Server-2010/Comisi-n-Federal-de-Electricidad-CFE/Mexico-s-Electrical-Utility-Sees-Saving-Millions-of-Dollars-through-Collaborative-BI/4000007996](http://www.microsoft.com/casestudies/Microsoft-Sharepoint-Server-2010/Comisi-n-Federal-de-Electricidad-CFE/Mexico-s-Electrical-Utility-Sees-Saving-Millions-of-Dollars-through-Collaborative-BI/4000007996))
  - Windows Azure DataMarket ([datamarket.azure.com](http://datamarket.azure.com))



Thank you

