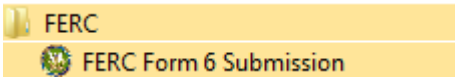
Form 6 - Annual Report of Oil Pipeline Companies

Electronic Submission Software - Installation Manual

Overview of Form 6 Installation and Operation

The FERC Form 6 Submission Software is downloaded from the FERC Forms Server via the Internet. The downloaded file is an installation file. It is used to install the application on your workstation.

Once the software is installed it will appear in your workstation "Start Menu" under a Program Group called “**FERC**”. You would start the software by clicking on "**Start/All Programs/FERC/ Form 6 Submission**".



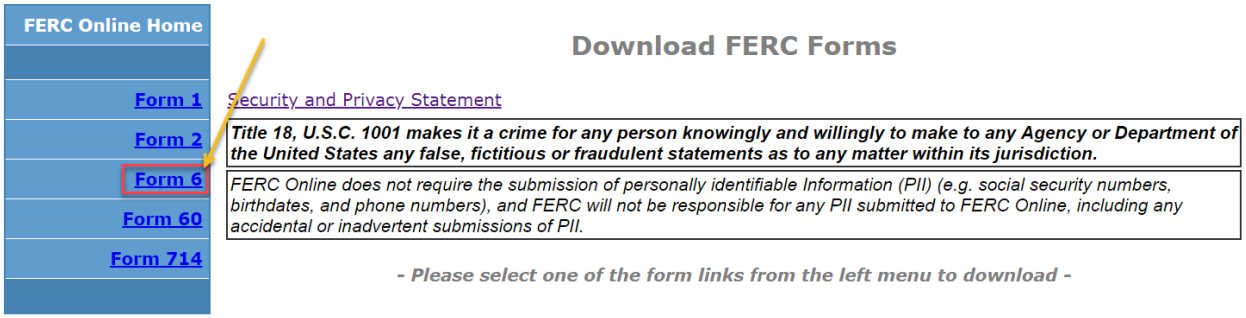
The first time Form 6 is used, it will ask you to download a copy of your Form 6 Database. This database will be used year after year for Form 6 preparation and filing. Therefore, you should take steps to ensure the database is backed up and saved between filing periods.

Every time you run the Form 6 software, it will check with the FERC Forms Server via Internet to determine if there are any updates to the software. If updates are available, they will be downloaded to your workstation and installed automatically. This keeps everyone's copy of the software in synchronization - and rectifies problems you may find and report to the FERC.

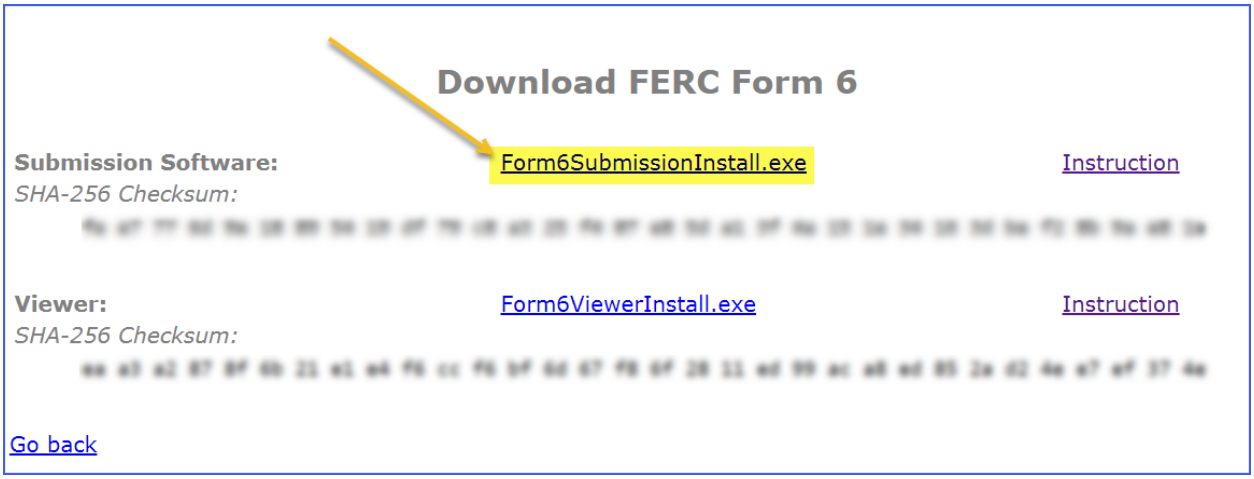
The Form 6 database must be installed on a Network drive for sharing among users and to provide security backup for the database. Any number of company workstations can use the database concurrently so that work may be distributed among a number of employees.

Downloading and Installing the Form 6 Submission Software

Click the Form 6 Submission Software link EXE to open the webpage hosting all the Forms installation files. Then, click to the Form 6 link button on the left menu to open the Form 6 page.



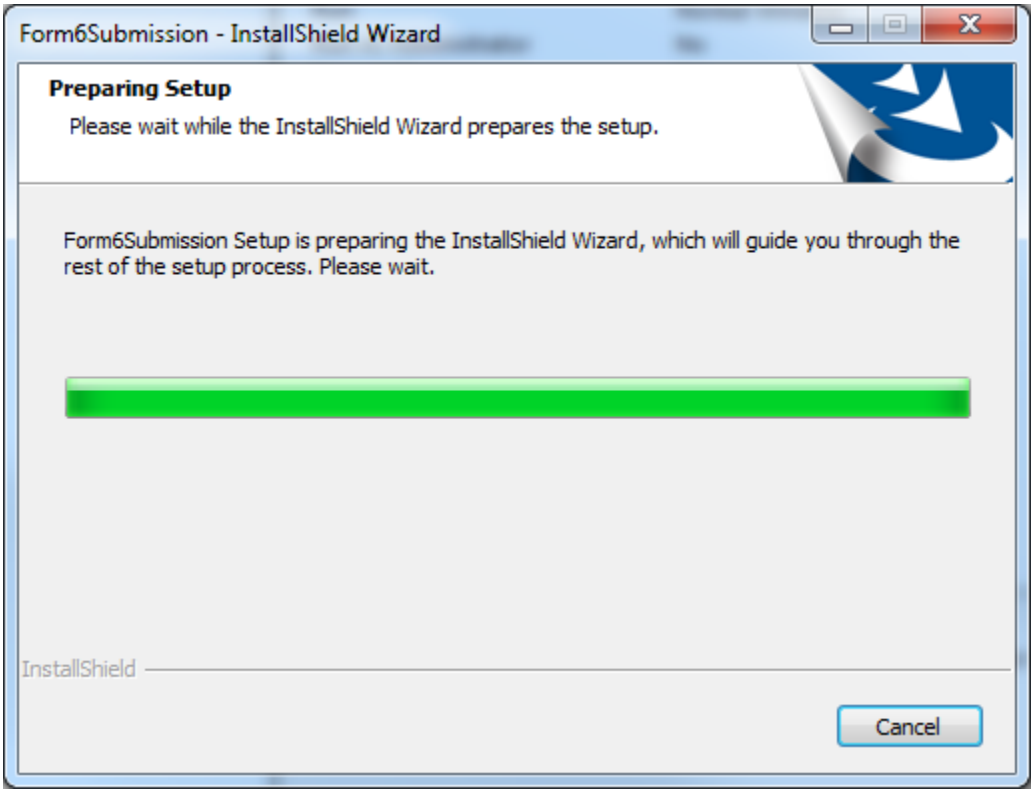
The following screen will appear. Click “**Form6SubmissionInstall.exe**” link button to start downloading the file.

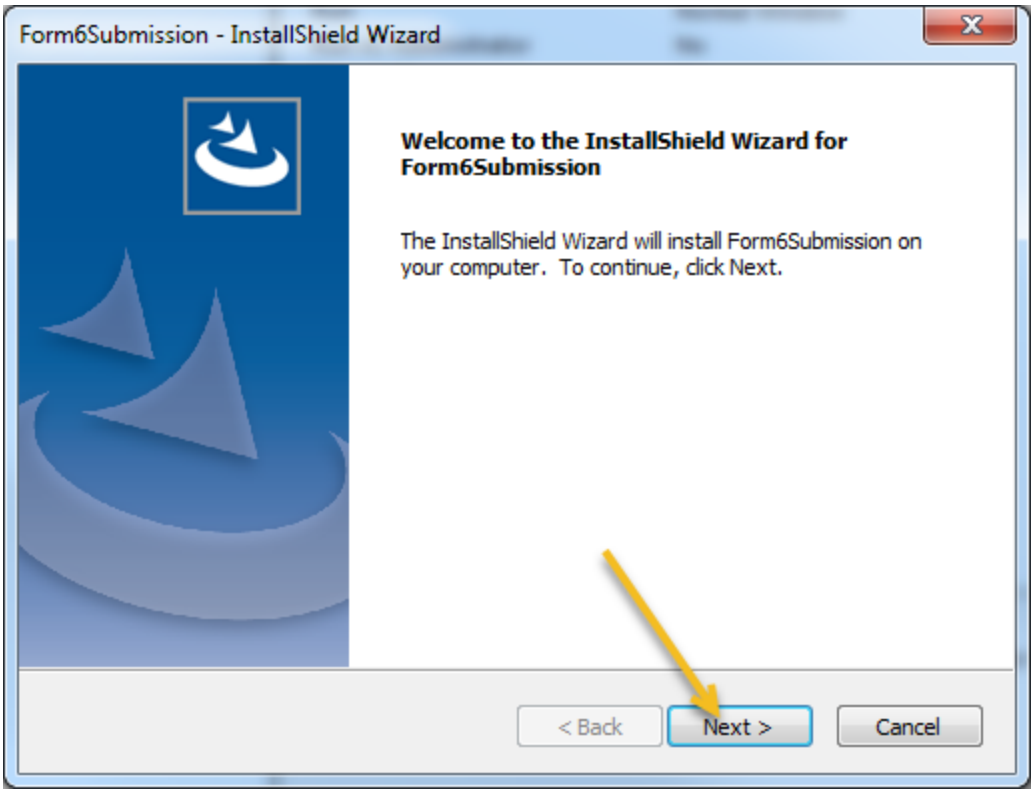


You may choose "**Run**" or "**Save**" the file. You may choose "**Run**" and installation will begin. If you choose "**Save**", the downloaded installation file can be used to make multiple installations. In this instance, remember where you tell the software to save the file. After download, locate the file with Windows Explorer, place your cursor on the file name, and double-click. This will start the installation process. If you install the F2SS on multiple workstations, you can copy the installation file to your network and invoke it from there.

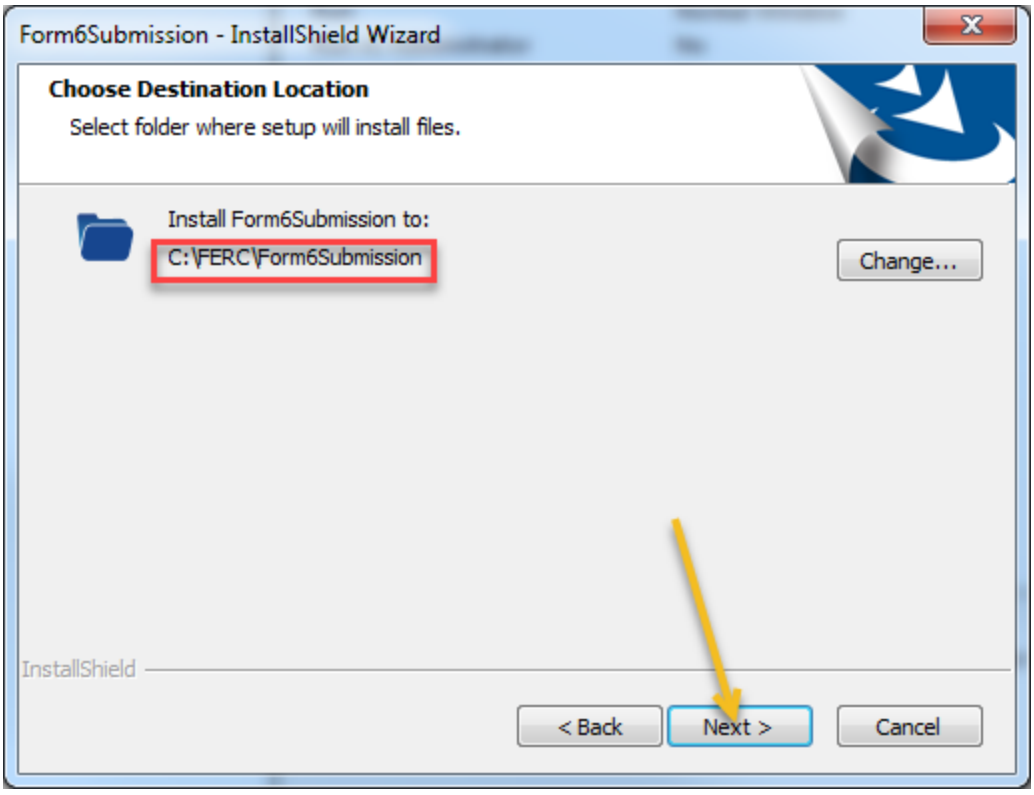
On executing the installation file, the system will prompt you for your computer local administrator credential. If you don't have one, please get help from your IT Admin.

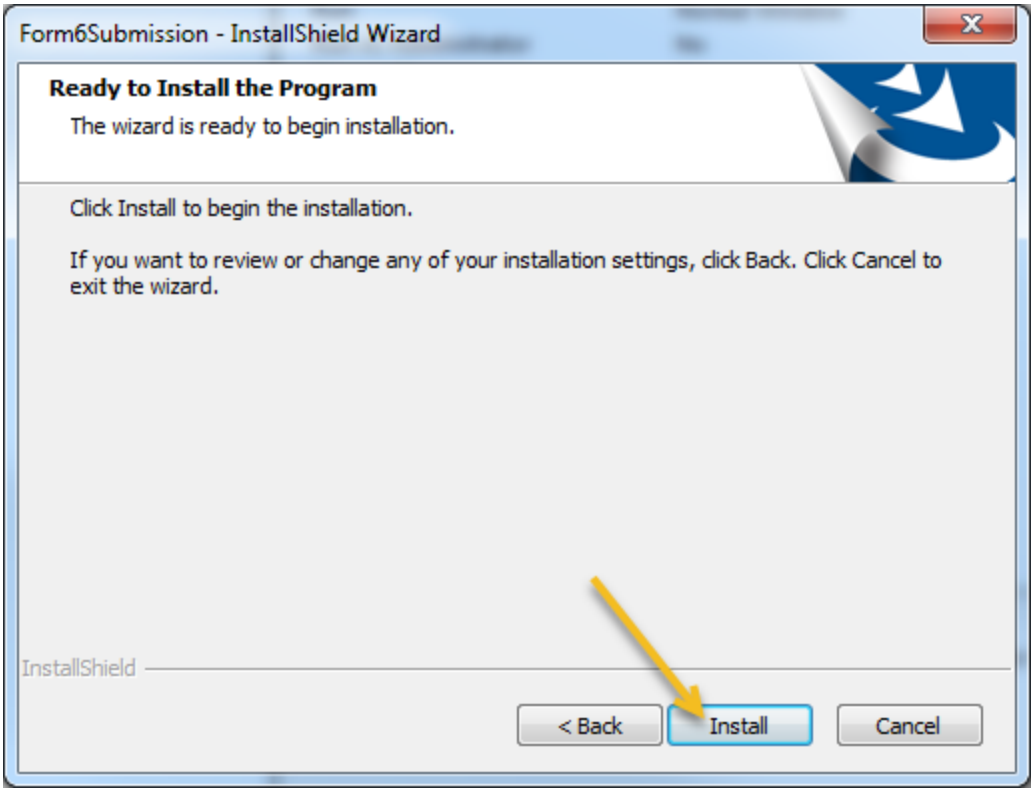
Step-by-step installation screenshots:

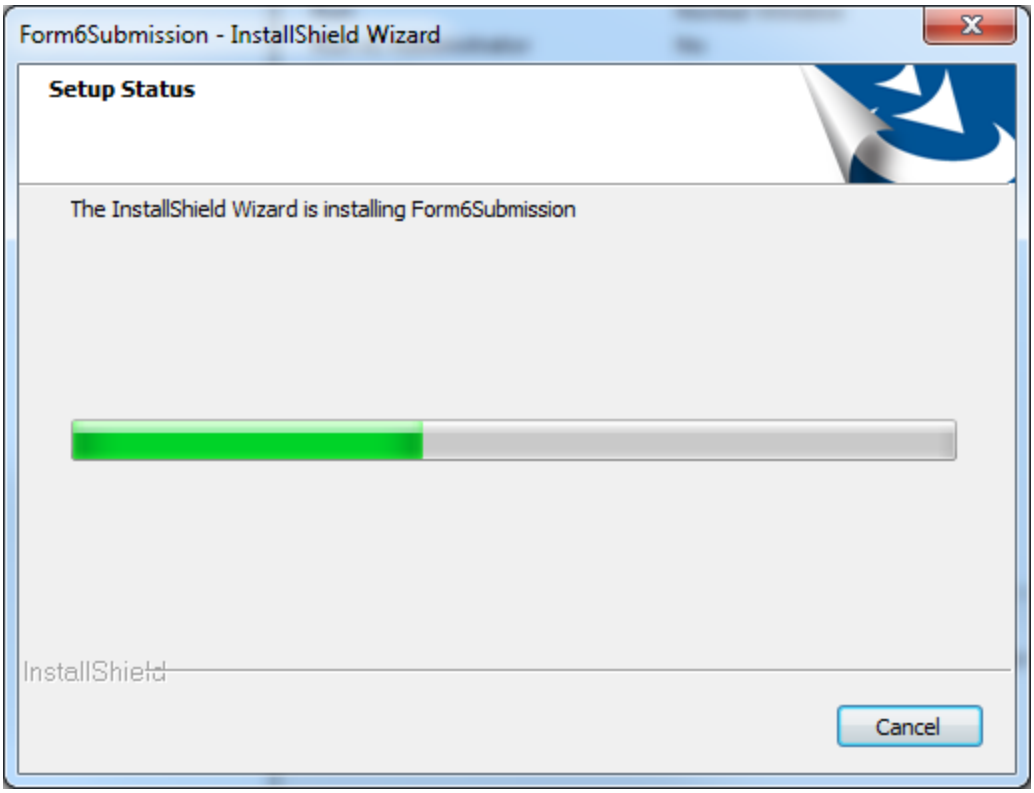




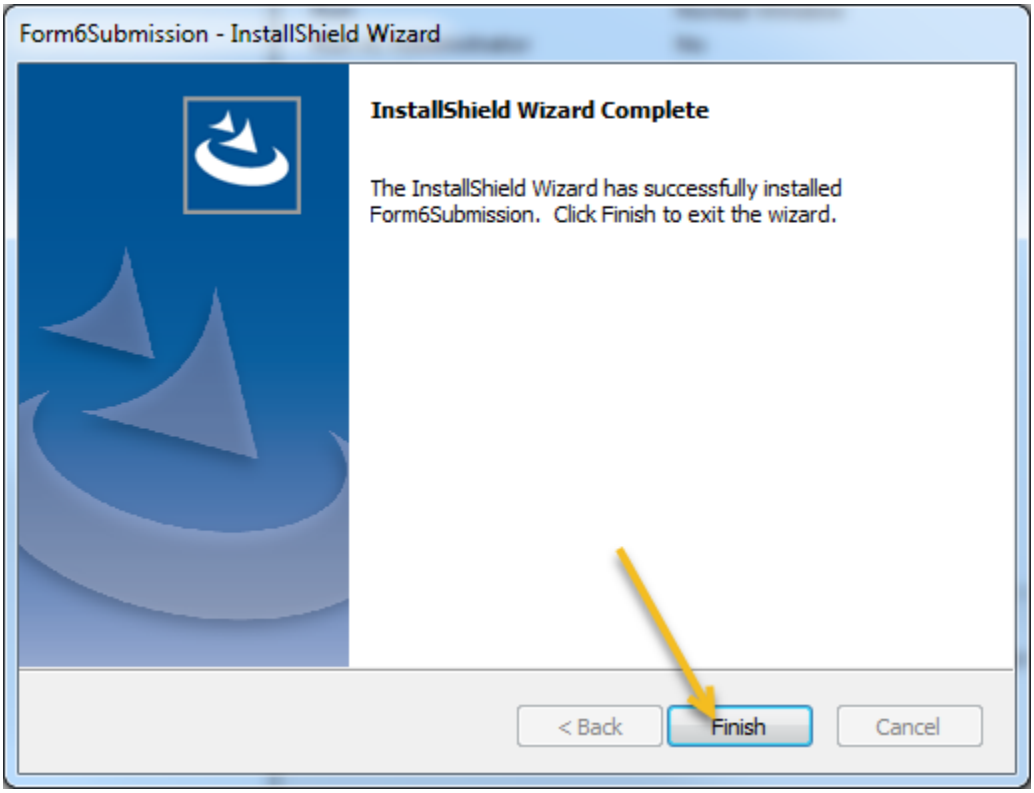
The setup program will want to place the application in the **FERC\Form6Submission** folder on your **C:** drive. If the folder does not exist, it will create it for you. **Please do not change the folder name** or location since it is easier for us to help you if you have a default installation. Just click "**Next**".


Form6Submission - InstallShield Wizard
Choose Destination Location
Select folder where setup will install files.
Install Form6Submission to:
C:\FERC\Form6Submission
Change...
InstallShield
< Back
Next >
Cancel


Form6Submission - InstallShield Wizard
Ready to Install the Program
The wizard is ready to begin installation.
Click Install to begin the installation.
If you want to review or change any of your installation settings, click Back. Click Cancel to exit the wizard.
InstallShield
< Back
Install
Cancel

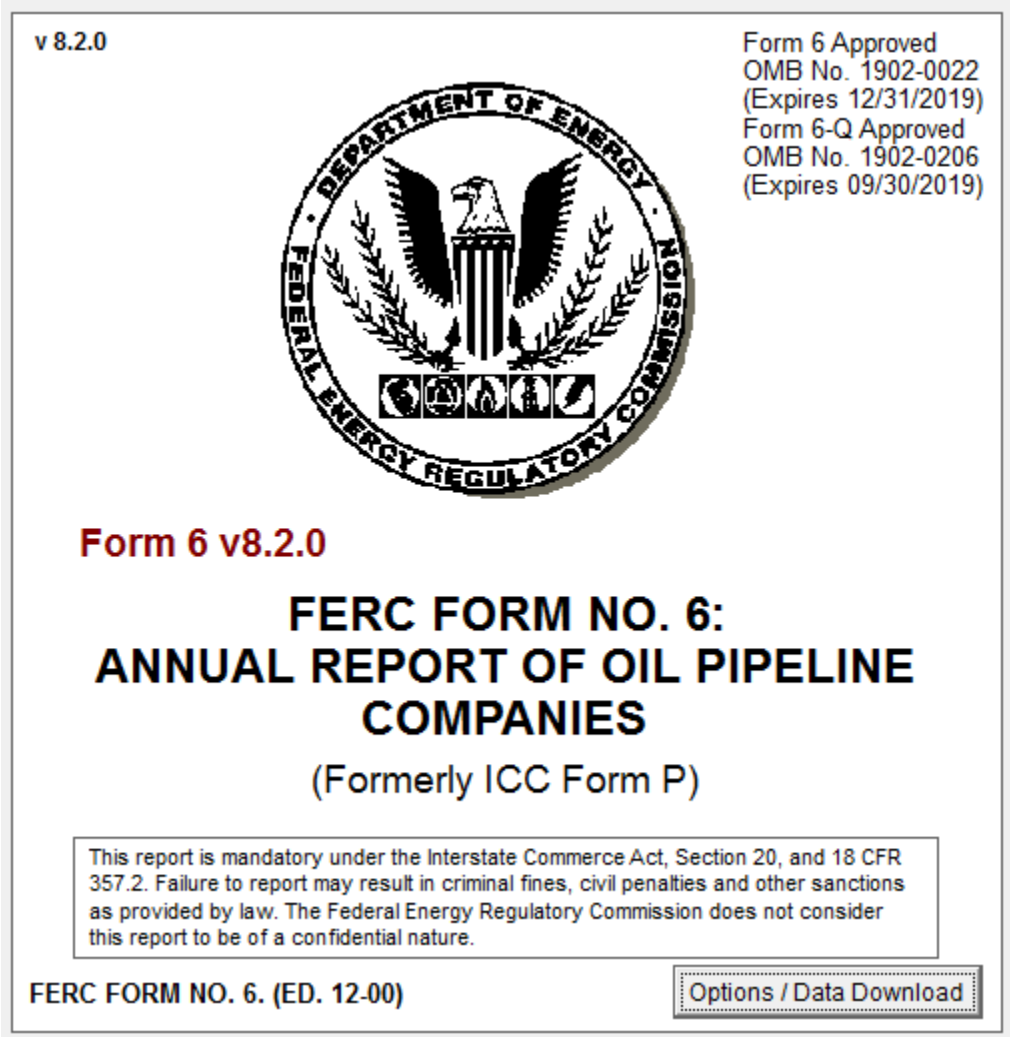


Eventually, the installation will finish and you will get the following notification:



Initial Operation and Setup of the Form 6 Software

At this point, installation is complete. You now need to set your communications options (if any) and obtain the initial download of your Form 6 database information. **However, if you have a Form 6 Database from previous years saved on your network drive, you should use that database.** When you first start the software (click on the Windows Start → All Programs → locate Program Group "FERC", then click on "FERC Form 6 Submission"), you will get the following "Splash Screen". Notice that the **Version Number** of the software is in the upper left-hand corner of the screen. This number changes every time updates and changes are downloaded to your workstation.



Downloading Your Initial Form 6 Database

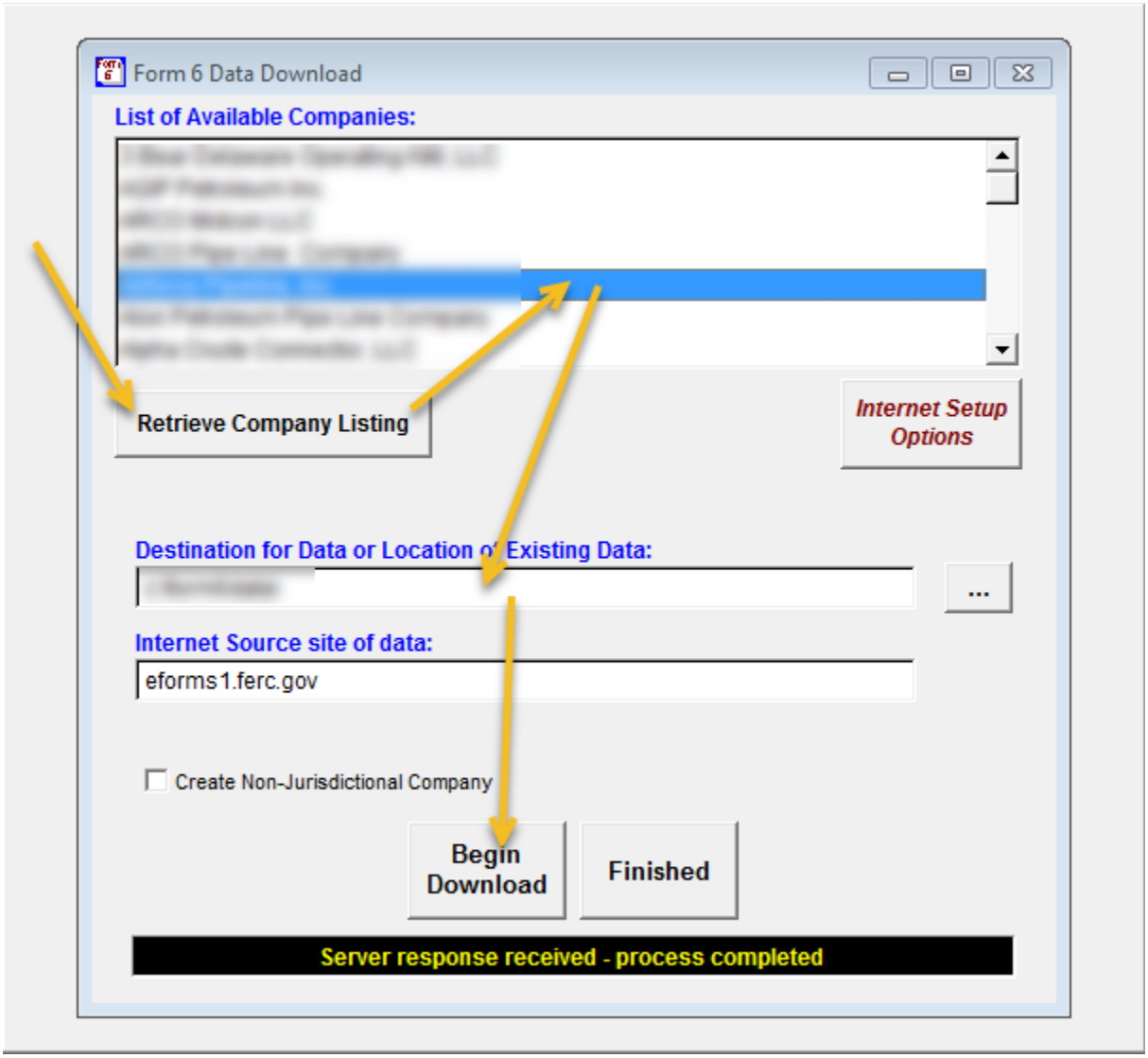
If you are running the software for the first time, the data download screen will appear (see below). This function allows you to download a database of the company or companies for which you file Form 6 information. If you filed Form 6 in the previous year using this software, you should have a copy of your Form 6 Database on your network. This version should be used instead of attempting to download a new database. If you have an existing database, you can skip down to the heading: "Using a Database from a Previous Year.

Before you proceed, you should click on the "*Internet Setup Options*" button and set any of the options that apply to your Internet connection. These options, if any, can be obtained from your Network/IT Support Personnel. These options may also be set within the data entry software by clicking on the "Options" pull-down menu at the top of the screen, and clicking on "*Internet Communications Setup*".

The next step is to determine a location for your database. The box titled "*Destination for Data or Location of Existing Data*" shows a proposed default location for your Form 6 Database. It is highly recommended that you choose a directory on your Network for the Form 6 Database. First of all, storing the database on your network permits multiple users of the Software to work at the same time. (If you desire having multiple users inputting data, the database must be on a shared network drive accessible by all users). Secondly, you will be protected from losing your work should your workstation have a malfunction. Most network data is backed up every evening. If you chose not to use a network drive for your database, and ensure that it is backed up frequently, you are at risk of losing all your work should something happen to the database because of hardware malfunction. Please consider the ramifications of this happening, and take appropriate action to protect your data.

Once the Database location has been chosen, you click on the "*Retrieve Company Listing*" button. The software will obtain a list of companies available for download from the FERC Forms Server. If you cannot get the list, refer to Troubleshooting. This is to prevent users from accidentally downloading a new database copy instead of using the database from previous filing periods.

Select your company name in the "*List of Available Companies*" box by clicking on it once. Then, click on the "*Begin Download*" button. The software will notify you when the download is complete. If you file for more than one company, you may now select a different company for download, and click the "*Begin Download Button*" again. Continue in this manner until all companies you file for are downloaded. Once database download is complete, you may click on "*Finished*".

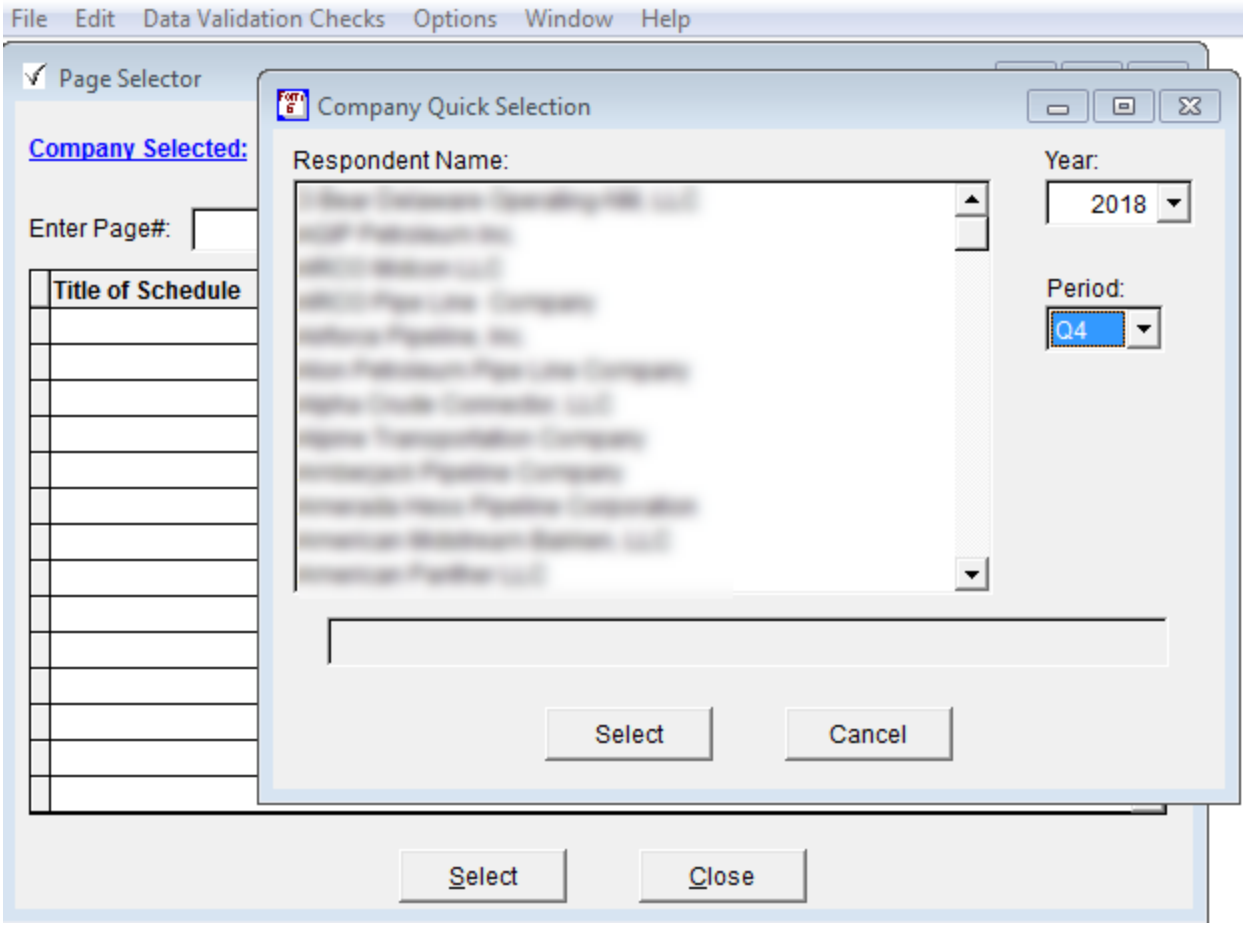


You might consider giving the network folder a descriptive name, like "FERC Form6 Database". This may persuade people not to delete the folder after you are finished filing for the year. You will need this database for next year's filing activity - **so please do NOT delete it**!

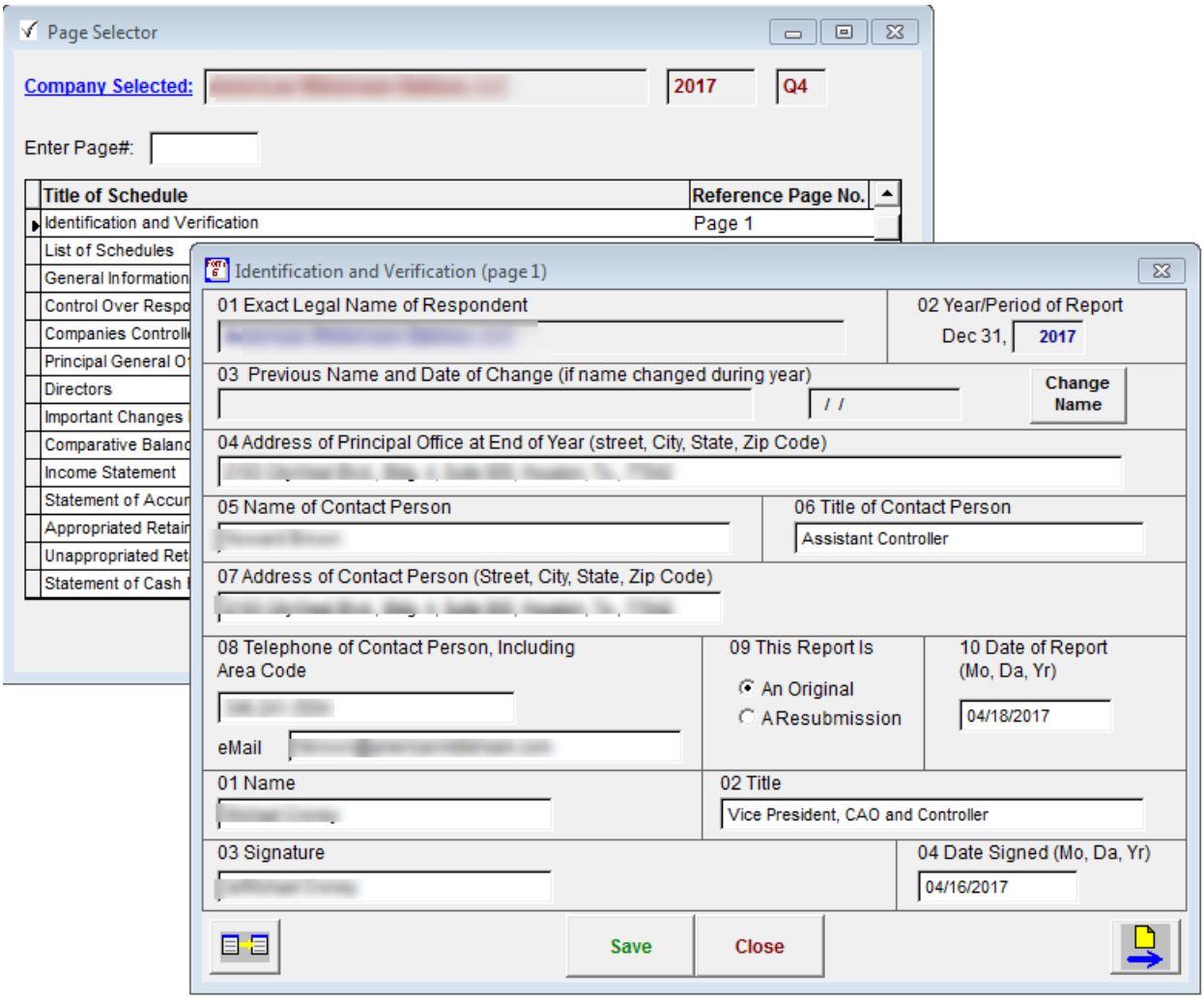
Once the Database location has been chosen, please update the '*Internet Source site of data*' to '*eforms1.ferc.gov*' if it is showing something else. Now click on the "*Retrieve Company Listing*" button. The software will obtain a list of companies available for download from the FERC Forms Server. If you fail to obtain the listing, then you are experiencing problems communicating with the FERC Forms Server, and you may have to review your Internet Settings.

Select your company name in the "*List of Available Companies*" box by clicking on it once. Then, Click on the "*Begin Download*" button. The software will notify you when the download is complete. If you file for more than one company, you may now select a different company for download, and click the "*Begin Download Button*" again. Continue in this manner until all companies you file for are downloaded. Once database download is complete, you may click on "*Finished*".

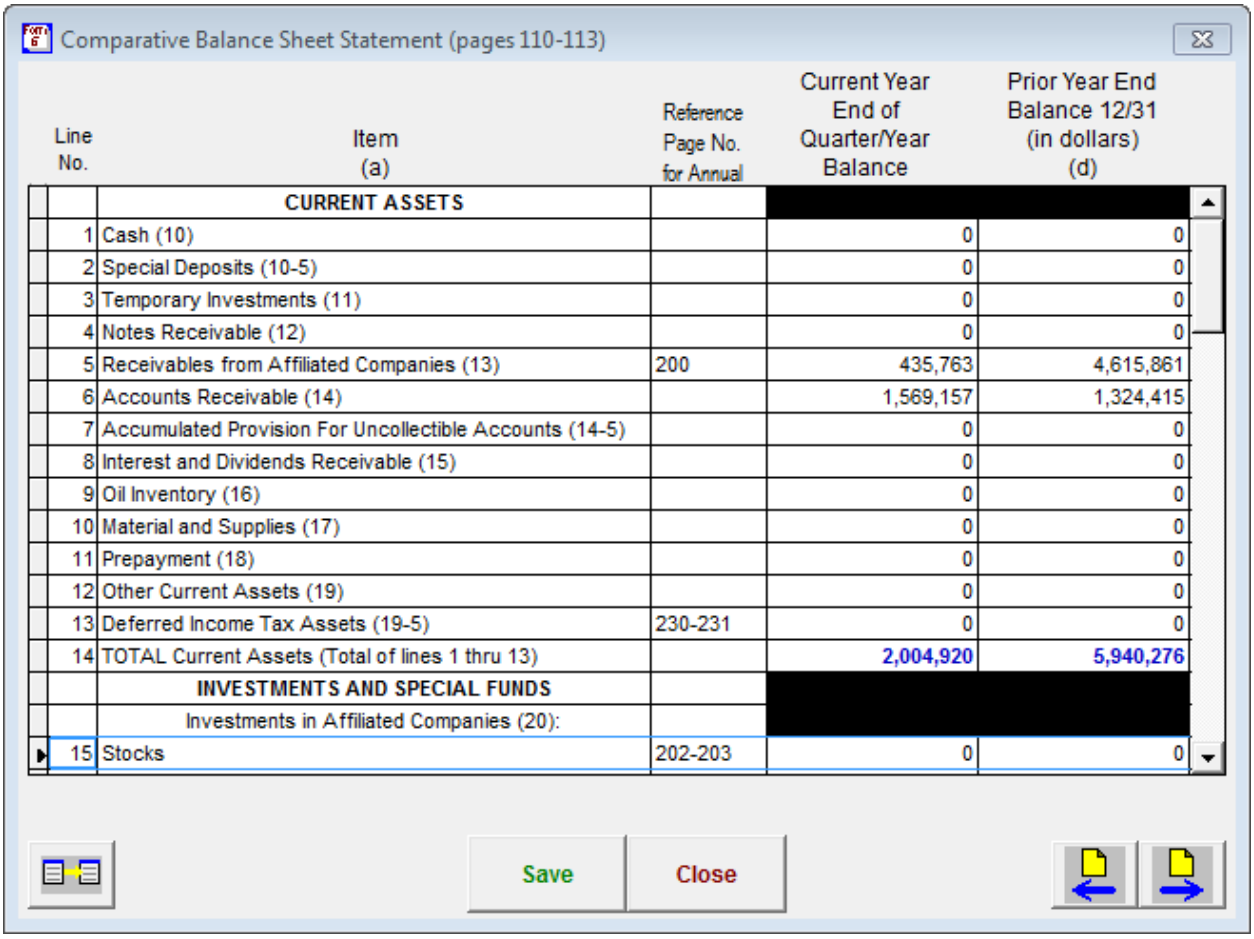
The following Main Screen will appear. You must click on the blue "**Company Selected**", highlight the company (so it turns blue) in the Company Selection Screen, and pull down the year menu and choose the year.



Once you select the company and year, and click on "*Select*", you will see the "*Page Picker*" screen with the various schedules. In the screen below, the user double-clicked on Page 1 under the "*Reference Page No.*" column.



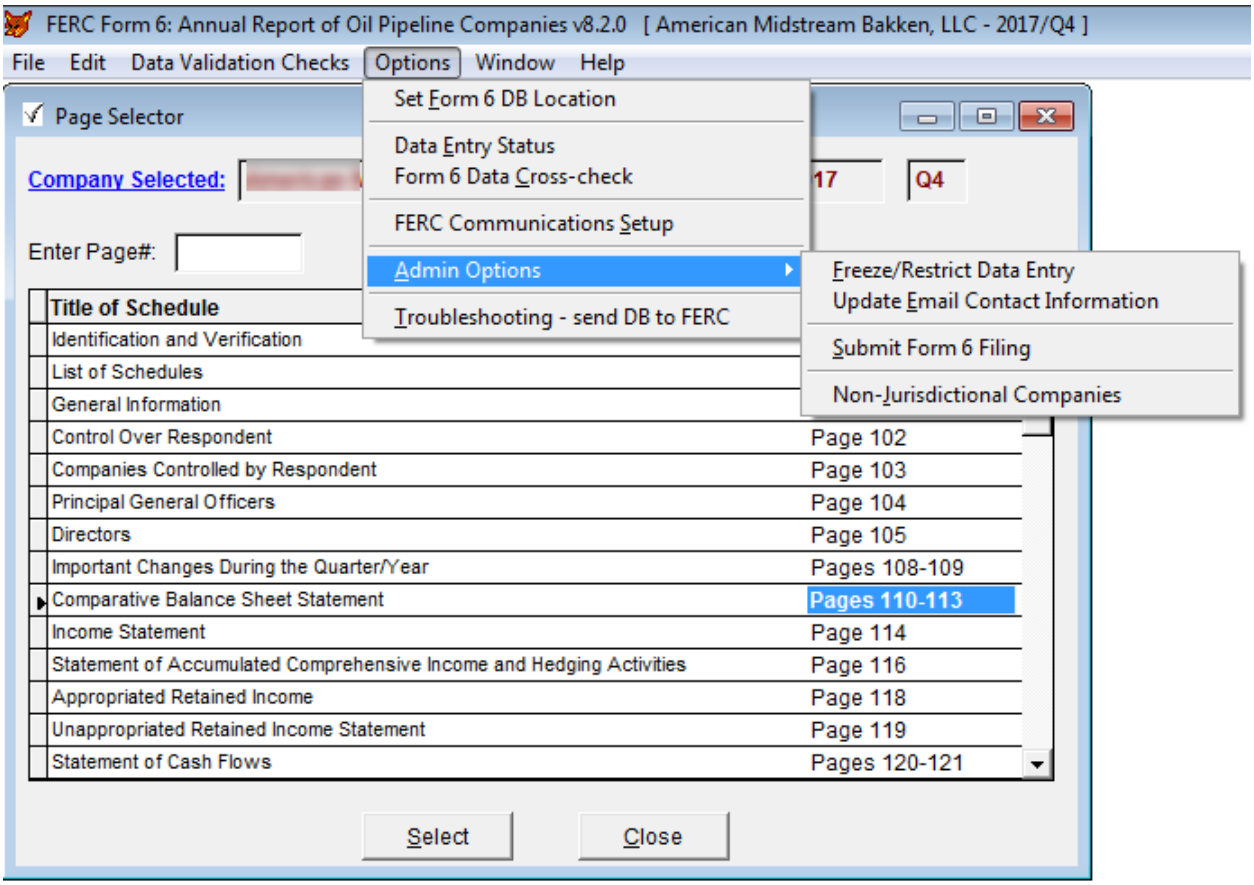
Here is an example of Page 110-113. Essentially, you just "*Filling in the Blanks*" on those line items that apply to your company. You need to click on "**Save**" to save the data you have entered.



Comparative Balance Sheet Statement (pages 110-113)

Line No.	Item (a)	Reference Page No. for Annual	Current Year End of Quarter/Year Balance	Prior Year End Balance 12/31 (in dollars) (d)
	CURRENT ASSETS			
1	Cash (10)		0	0
2	Special Deposits (10-5)		0	0
3	Temporary Investments (11)		0	0
4	Notes Receivable (12)		0	0
5	Receivables from Affiliated Companies (13)	200	435,763	4,615,861
6	Accounts Receivable (14)		1,569,157	1,324,415
7	Accumulated Provision For Uncollectible Accounts (14-5)		0	0
8	Interest and Dividends Receivable (15)		0	0
9	Oil Inventory (16)		0	0
10	Material and Supplies (17)		0	0
11	Prepayment (18)		0	0
12	Other Current Assets (19)		0	0
13	Deferred Income Tax Assets (19-5)	230-231	0	0
14	TOTAL Current Assets (Total of lines 1 thru 13)		2,004,920	5,940,276
	INVESTMENTS AND SPECIAL FUNDS			
	Investments in Affiliated Companies (20):			
15	Stocks	202-203	0	0

Save Close



The above form shows the menus available under "Options". Here is a brief description of each option:

Set Form 6 DB Location allows you to change the drive and folder of where the software expects to find the Form 6 database. If you want to change the database location, the best way is to copy the entire database to the new location folder. Then, start the software and change to the new location. Then, exit the software and delete the old Form 6 database location.

Data Entry Status scans the database and provides a report on which schedules have had data entered, and which ones have not.

Form 6 Data Cross-Check develops an edit report of discrepancies between schedules where the same totals should appear.

FERC Communications Setup allows you to change Internet Communications values - essentially the same screen that you can use in the initial data download. Only change these entries if you are certain they apply at your company.

Non-jurisdictional Companies have to do with creating copy of your company's data for submission to the State if applicable.

Freeze/Restrict Data Entry is for situations where a number of people are concurrently working on the same Form 6 Submission. The "Freeze" feature allows the locking of specific schedule pages so that they may be viewed, but not modified. This allows the administrator to prevent changing of schedule pages once they have been completed and printed. The "Restrict" feature prevents viewing of any selected schedule page(s) except by the PIN holder. (The PIN is a unique number that will be issued by the FERC to the primary contact at each company, and is used for filing Form 1 electronically and other administrative actions.)

Submit Form 6 Filing is the process where the Form 6 information (submission) is transmitted to FERC. Upon receipt, you will receive a return email informing you that the submission has been received. The unique company PIN number is necessary to invoke this option.

Other Data Entry or Application Features:

Footnoting Footnotes may be entered on any cell in the Form 6. There is no practical limit to the size of a footnote. To footnote a cell, "Right-Click" on the cell. A footnote menu will appear. The footnotes and other text elements of the Form 6 (like Notes to the Financial Statements) contain limited Word Processing capability. This means that you may cut or copy information from a word processing document and insert it into the footnote without losing formatting or the vertical alignment of columns and tabs.

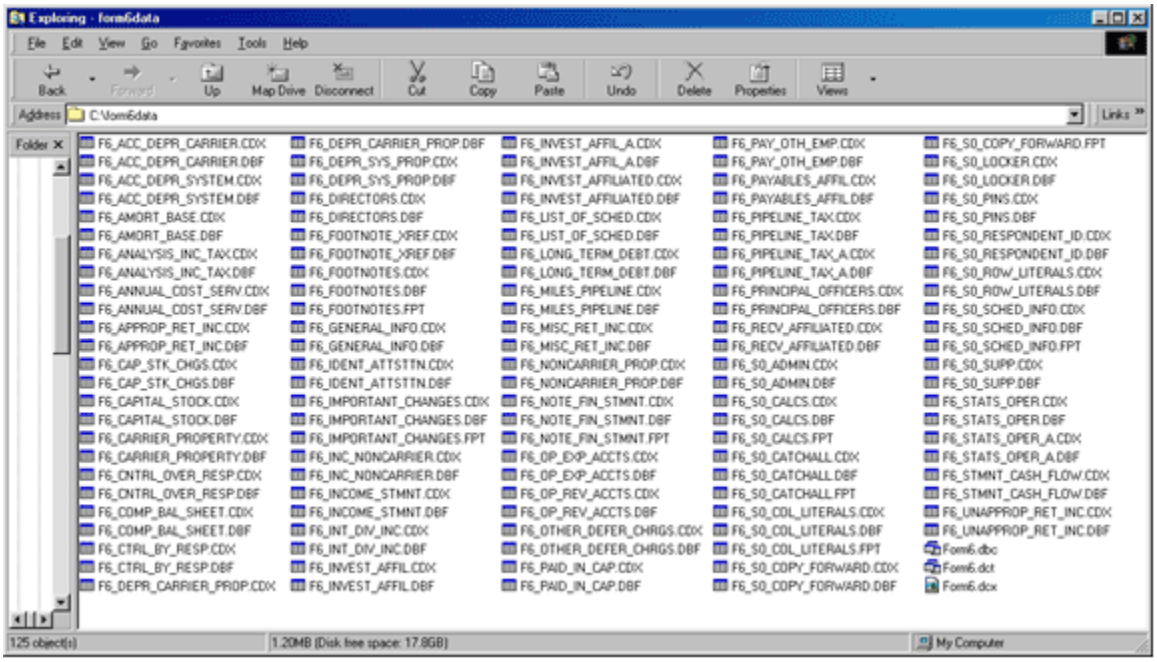
Printing By clicking on the File pull-down menu at the top of the screen, you can invoke the Print Menu. This permits printing of a blank form, selected pages, or the entire Form 6.

If You Have Problems, Please Read Carefully

You may experience problems downloading your initial database or obtaining the automatic updates mention at the beginning of this document. Either of these problems can usually be traced to your Firewall used to protect your network from outside interference. The software will work OK at most companies. However, if you have a problem with these two issues, your only recourse is to plead with your IT folks to loosen things up a little or make some accommodation.

If you have errors in the software where it quits, gives you some kind of system error, or otherwise acts in an abnormal manner, you can report these problems to FERC and we will try to resolve them. (See below for reporting procedures) If there are bugs in the software, we will fix them, and distribute updates to your software automatically. The software has version numbers which change as we apply corrections or improvements.

Below is an example of the Form6 Folder where the software is installed on a typical workstation:



Notice the file named **F6.log**. When you send us an email regarding any errors or problems, we must have the F6.log attached to the email. Also, be sure to put the words Form6 in the Subject of the email. If you forget to attach the F6

log file, we will send you a reply mail asking for it. So, it just saves time to send it along in the first place. Of course, your IT people are welcome to review the log file and help diagnose any problems you might have.

Please indicate the following information with your troubleshooting request:

- Form: Form 6
- Respondent Name
- Reporting Period
- Page number / Title of Schedule
- Line No.
- Column
- Details of the issue with screenshots
- Attach the F6.log file

Again, be sure to attach the F6.log to your email if you are reporting an error. Please put the words Form6 somewhere in the Subject of your email. This permits the email software at FERC to categorize your email, resulting in a faster response. A sample subject line might read: "*Subject: Form6 Problem with Updating 114"*.

Send emails with software problems, Internet problems, or suggestions for improvements to the application to FERC Online Support. If you feel you have a serious problem, call FERC Online Support toll-free at 866-208-3676.