

## How to Import Monthly Production Data using a CSV

### Setting Up the CSV File:

In order to successfully import a .CSV file, the import file should follow a few basic guidelines.

1. There should only be one row of header info to label each column of the import file.
2. The header row should only contain alphanumeric characters (letters and numbers). Dashes, underscores and spaces are ok, but avoid parenthesis, commas, brackets or other special characters.
3. Do not leave any rows of blank data between records.

Once the import file follows these basic guidelines, it's time to move on to the more specific details of the layout. To receive the best results when importing Monthly Data into PHDWin, you have to include enough information for PHDWin to recognize which case and well you are intending to update. Below is a simplified version of what your import file should look like.

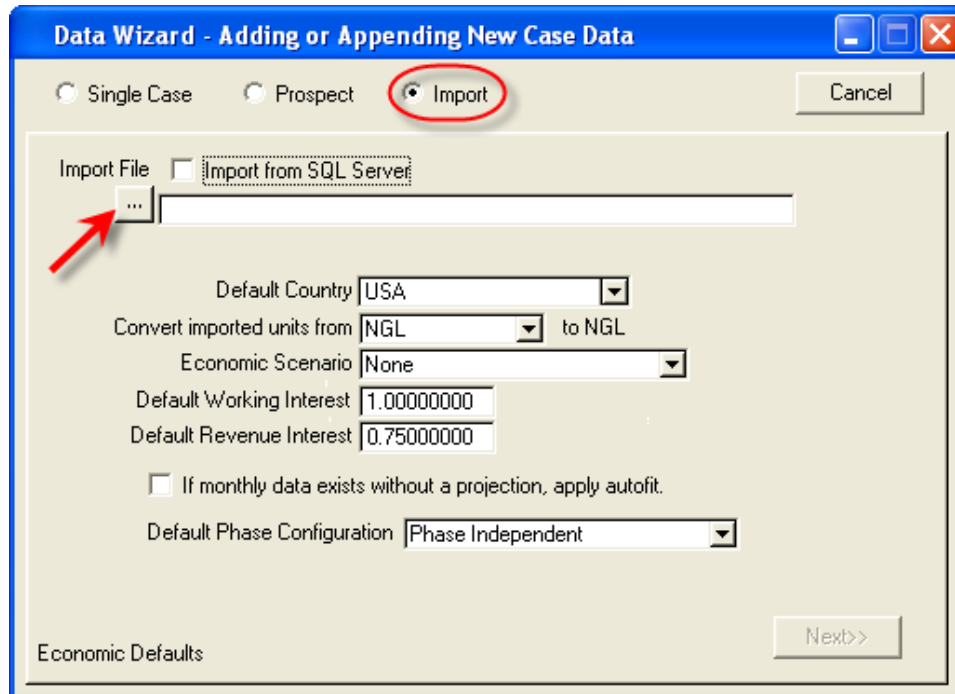
Import ID	Case Name	Prod Date	Oil Vol	Gas Vol	Water Vol	Days
123456	ROBBINS, J.W. 2	1/1/2011	1234	123	12	0
123456	ROBBINS, J.W. 2	2/1/2011	1234	123	12	0
789456	ROBBINS, J.W. Num 3	1/1/2011	1500	75	13	0

- **Import ID:** Any unique identifier for that case. If you are importing into cases that already exist in your PHDWin project, you will want to take an ID code from that case and use it for each record. **Column A** should always contain your import ID code. Import ID will be repeated for every record corresponding to the same case.
- **Case Name:** This column is only needed if the case does not currently exist in PHDWin. If you're using it, Case Name will be repeated for every record corresponding to the same case.
- **Prod Date:** The date should be in MM/YYYY or MM/DD/YYYY format. If using MM/DD/YYYY, you should always use the first of the month.
- **Monthly Products:** The other columns do not need to be in any particular order, but the headers should be something you can easily recognize.

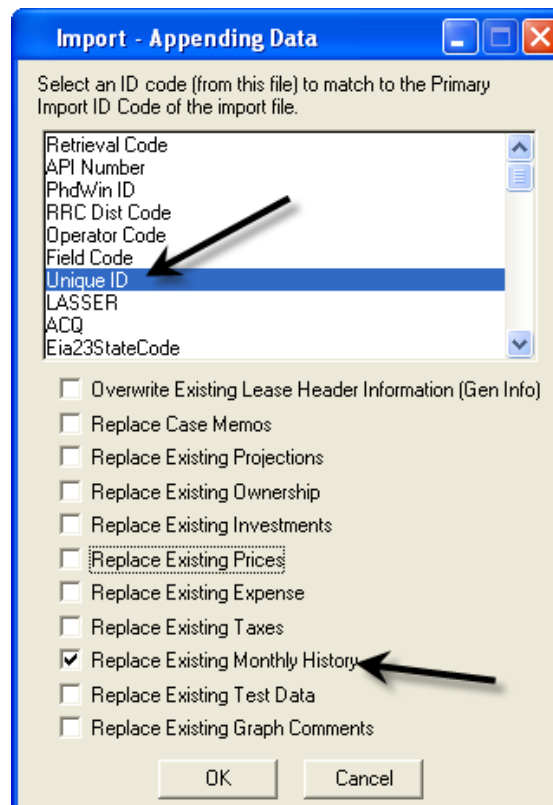
### Importing the CSV

1. Close the .csv and open PHDWin.
2. Open the project file you wish to import the monthly data for. Then go to **File >Backups > Backup**. This creates a backup file in case something goes awry during the import process.
3. Then go to **File > Import Data or Create New Cases**
4. Click the bubble next to **Import**

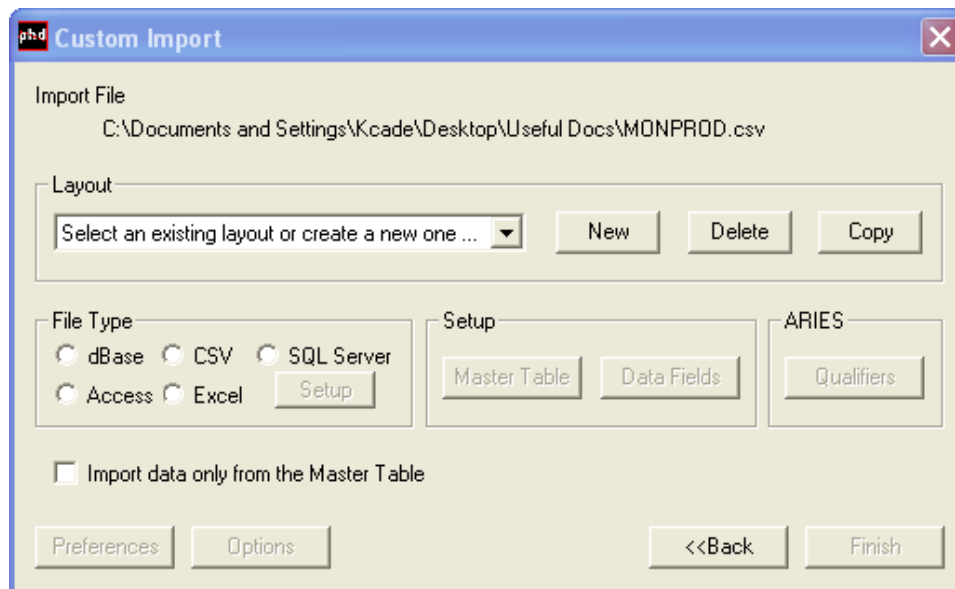
5. Click the browse button with the three dots on it [...]. Then choose the .csv file you wish to import. Click **Next >>**



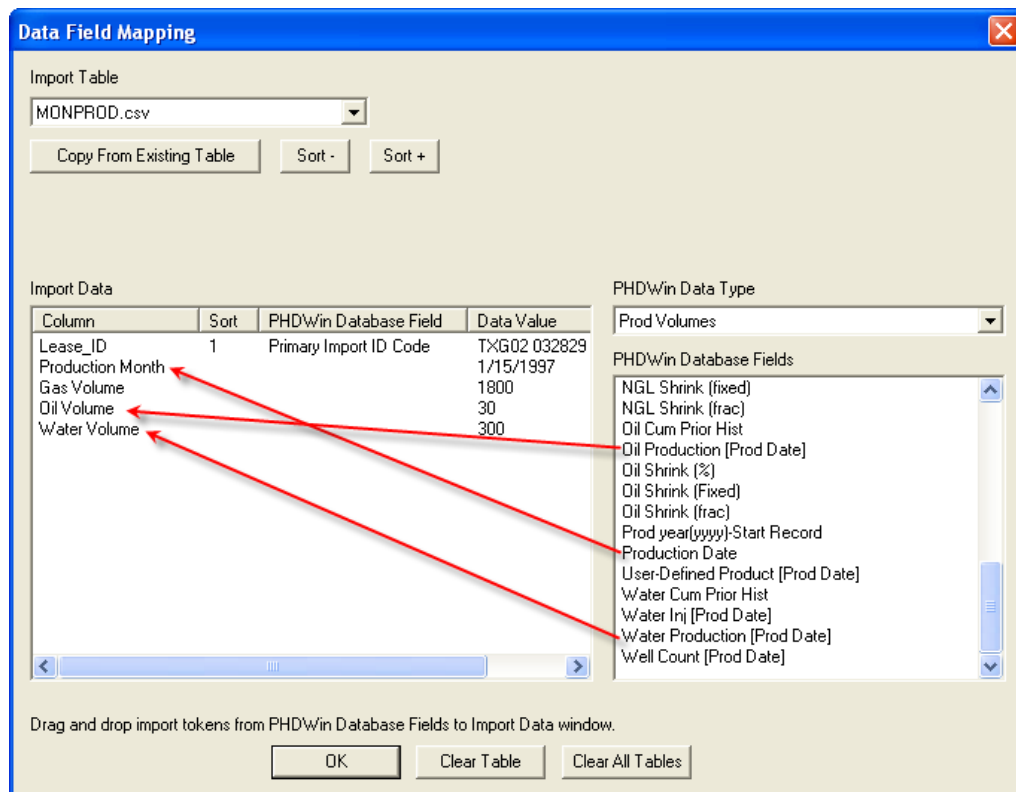
6. **Select the ID code** that you wish to match on. (For example, if you used the API number in the first column of your spreadsheet, highlight API Number on the list.)



7. Choose if you'd like to "**Replace Monthly History**". If there is an overlap between what is stored in PHDWin and the data in your spreadsheet, you can choose to check this box if you'd like PHDWin to be updated. All new monthly data is always added, even if you have this unchecked.  
**Note:** Do Not check the box to "Clear existing Monthly History" first.
8. Click **OK** – and the Custom Import Screen will open:



9. Click the **New** button to add a new layout – you can enter the description "**Monthly Production**" and click **OK**.
10. Under **File Type**, choose **CSV**.
11. Click the **Data Fields** Button.
12. On the right hand side, choose **Prod Volumes** from the PHDWin Data Type list - this is where you will choose fields from within PHDWin to be populated by the data present in your .csv file. . To do this, drag the variables from the PHDwin Database fields to match up with the correct columns on the left:



13. After you have finished mapping all of the data fields, click **OK** and then click **Finish**.

14. A new popup window will alert you as to how many records were imported.

## Troubleshooting

Here are a few other tips that may help if you're having trouble importing your file.

1. **Keep the file name short.** PHDWIN has a limit of 75 characters when reading a File Path, so long file names or having to go through several folders will interfere.
2. **Avoid special characters in the file name.** Periods in the file name are the most common problem, but other characters are also problematic.
3. If you've used a Layout successfully in the past, but now it's giving you problems, try **rebuilding a new layout**.