



# PROJECT TEAM PROPOSAL SPECIFICATION SUPPORT

## Industrial Data Exchange Platform for Downstream Terminal Master Data

PIDX Document Title: Industrial Data Exchange Platform for Downstream Terminal Master Data PTP  
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Document ID: TBD

PTP Version 3.0  
Date: 09/03/2021

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## 1. Proposed Project Team / Study Name

Industrial Data Exchange Platform for Downstream Terminal Master Data

## 2. Description

### 2.1 Purpose

In line with the PIDX Strategic Initiatives Committee and [Industrial Data Exchange \(IDX\) Project](#), build an API-driven data exchange platform for the PIDX Downstream Codes.

At present, accessing and updating this data is a manual process, from suppliers (oil companies) to third party terminals, utilizing fax, email or other error prone methods of data transmissions. Reconciling data sets is difficult.

Part of this project would also include providing the industry with a standard protocol to transmit data sets that include customers, partners, carrier/haulier information and product information.

### 2.2 Scope

The intended scope of this project is within the downstream industry, specifically servicing the bulk fuels terminals and related businesses.

### 2.3 Goal

The intended scope of this project is within the downstream industry, specifically servicing the bulk fuels terminals and related businesses.

#### 2.3.1 Identify criteria for success of the deliverables / specification as deployed in industry.

- Development of API-driven data exchange platform for the PIDX Downstream Codes
  - o Company Codes
  - o Product Codes
  - o Terminal Codes
  - o Regional Codes
- Bring clarity and industry visibility around requesting PIDX codes
  - o TDS/TABS comparison

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- o ID codes that are not on the list
- Determine process for handling missing codes and duplicate codes
- Create action plan for handling bad codes
  - o Define/confirm attributes to make a code
  - o Can bad codes be added to the code list?

### 2.3.2 Identify all of the stakeholders of which you are aware. Operators, Suppliers, and Marketplaces

Suppliers (operators, oil companies) – this is typically the initiator of the current process when a change is required to the data in the Terminal Automation System – likely activities include adding/removing a customer, adding/removing a driver, updating product information.

Terminal automation system vendors – the system that is the target of the update when changes are needed, but the system is typically not under the direct control of the initiator of the change.

Terminal operator – responsible for approving the change and updating the terminal automation system.

Lifting control system vendor – In some cases, a third party system sits between the suppliers ERP system and the terminal automation system. This system is interactive with the terminal automation system and acts as a clearinghouse for data. Vendors of a lifting control system may also choose to participate in the master data transfer.

### 2.3.3 Identify the stakeholders who are willing to join the work effort. (See Sponsor & Participants)

Elena Mereanu (T4), Scott Weathers (Toptech Systems), Kris Pronske (DTN)

## 2.4 Proposal

### Development of API-driven data exchange platform for the PIDX Downstream Codes

- o Company Codes
- o Product Codes
- o Terminal Codes
- o Regional Codes

Provide the industry with a standard protocol to transmit data sets that include customers, partners, carrier/haulier information and product information. This is frequently a manual process, especially from suppliers (oil companies) to third party terminals, utilizing fax, email or other error prone methods of data transmissions. Reconciling data sets is difficult.

Provide a protocol that will support the transmission of the identified data in a reliable fashion, to remove the need for manual data entry, reduce delays in propagating information, and increase accuracy. The processes will likely require approval or acceptance of data elements in lieu of manual data entry, which implies approval.

A reconciliation process should also be created for occasional verification of the source and target data sources.

### 3 PIDX Definitions

N/A

### 4 Benefits

- List benefits for all PIDX users
  - Current processes are manual and error prone, automate these processes
  - Support a single straightforward protocol for providing the key data sets to terminals
  - Allow interoperability across various lifting control and terminal automation systems so suppliers are not having to maintain multiple different interfaces for the same purpose

### 5 Sponsor and Participants

PIDX member/company sponsoring development of these specifications/this project:

Member	Company	E-Mail Address
Elena Mereanu	Transport4 - Coordinating with Downstream	
Mimi Stansbury	OFS Portal - In support of PIDX IDX	



The following PIDX members/companies are participants in the development of these specifications:

Member	Company	E-Mail Address
TBD		

Mail distribution list required?	Yes
Please provide the name of the mail distribution list:	DSMasterData

## 6 Deliverable Schedule

Component	Estimated Completion Date
Build-out of POC industrial data exchange platform for Downstream Codes	TBD
Review of Downstream Codes platform with PIDX Downstream Work Group	TBD
Business Process Guidelines documentation – including: Use Case(s), diagrams, best practices	TBD
Buildout of forms, etc. for code requests (Business Messages)	TBD
Build/Review API based system for master data	TBD
Distribute initial business processes document and API system for discussion	TBD
Work Group Approval	TBD
S&G and Executive Approval	TBD
Member Voting	TBD

## 7 Anticipated Completion Date

Q1 of 2022

## 8 Initial Contributions

Document name	Type of Document	Document Source
PIDX Product Codes	Code List	pidx.org
PIDX Company Codes	Code List	pidx.org
PIDX Terminal Codes	Code List	pidx.org
PIDX Regional Codes	Code List	pidx.org

## 9 PIDX Resource Requirements

*PIDX staff and/or contracted resources*

Minute taking	Y			
Facilitation	Y			
Planned activity	Number per month	Number of months	Duration (hrs)	Total PIDX Time (hrs)
Conference calls	1	12	1	12
Face to face meetings				

Total PIDX staff time required for this project.	12
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## 10 Marketing & Publicity

Provide the following information in order to maximize participation, awareness, and reach of your project.

Project Short Name (for projects with longer titles):

**Industrial Data Exchange Platform for Downstream Codes**

Project Objective (to attract participants):

**Development of API-driven data exchange platform for the PIDX Downstream Codes**

- o **Company Codes**
- o **Product Codes**
- o **Terminal Codes**
- o **Regional Codes**

Key words:

**Downstream codes, terminal operators, terminal systems, industrial data exchange, Downstream master data, Downstream Company Codes, Downstream Product Codes, Downstream Regional Codes, Downstream Terminal Codes**

**Sponsoring Members will be contacted for a Company Logo (if not yet submitted).**

## **11 Sponsoring Member /Work Group/Sub-Committee**

This specification has been submitted by Elena Mereanu on behalf of the Downstream Work Group/ Sub-Committee.

Contact Information:

Name: Elena Mereanu

Company: Transport4

Mailing Address:

Telephone:

E-Mail Address:

Signature: Refer to email approval on 8/20/2021

The chair of this Work Group/ Sub-Committee has reviewed this submission for completeness and understands this particular Work Group/ Sub-Committee is the Sponsoring Work Group/ SIG, responsible for the communication process. This does not mean the Chair or Work Group/ SIG is approving the actual work or its inclusion in any specification.

Chair's Signature Refer to email approval on 8/20/2021

Project Team Proposal Approved by Standards and Guidelines (S&G) Committee on 9/3/2021





## 12 PIDX Executive Committee

Upon review by the PIDX Executive Committee, this Project Team Proposal (PTP) is:

Approved

Denied

Requires additional information

If “Denied” or “Requires additional information, please provide details:

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Recorded by:

Standards & Compliance Manager, PIDX International