

Reporter User Guide

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Any questions regarding this document or others should be forwarded to the following:

Pason Systems Corp.

6130 – 3rd Street S.E.

Calgary, Alberta T2H 1K4

Canada

Phone: 1-403-301-3400

Fax: 1-403-301-3499

Email: info@pason.com

Website: www.pason.com

For 24-hour support, phone Pason Technical Support toll free: 1-877-255-3158

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1 Overview

Reporter is a tool for creating and submitting reports. The types of reports you can create depends on whether you are using Reporter on a service rig, or on a drilling rig.

On a service rig, Reporter is installed on a laptop. Rig personnel use Reporter to create a tour sheet report that includes details of operation, well servicing, and hours of service. You can also use it to manage crews, and to revise, print, and send reports to the office.

On a drilling rig, Reporter is installed on a Pason Workstation. Rig personnel, usually a rig manager, use the Contractor Morning Report (CMR) feature to create a summary report of rig operations.

Before you can use Reporter you must install it on a laptop (service rigs), or on a Pason Workstation (drilling rigs). Reporter installed on a service rig laptop requires a simple additional provisioning step. Once you've installed and provisioned Reporter, you can start using it to create your reports.

2 Installing Reporter

Before you can use Reporter, you need to obtain and set up a DataHub account, install the application, and then provision it.

2.1 Setting Up Pason DataHub Account Privileges

If you don't already have a Pason DataHub account, contact your Pason representative to obtain one. Once you have a DataHub account, Reporter requires the following DataHub privileges, which your company's DataHub administrator can set up:

- Tour sheet access
- Well ID access
- Pason Reporter access
- DataHub API access

Note:

If the DataHub user account doesn't have the appropriate privileges or access to the correct business units, an error message displays in Reporter.

2.2 Installing Pason Reporter Using the CD or DataHub Download

You can install Reporter from a CD installer or from a downloaded installer. Contact your Pason representative to obtain a Pason Reporter Installation CD, or download the installer from here:

pason.com/images/Downloads/Reporter/reporter_setup.exe

From the Reporter Installer CD or the downloaded installer, run Reporter Setup. The Installation Wizard then leads you through the required steps.

Note:

You require administrator rights to install Reporter on most computers. If you do not have administrator rights on your computer, contact your company's IT department.

3 Provisioning Reporter

After it's installed on a service rig laptop, the first time you run Reporter it must be set up, or "provisioned," so it can access the DataHub. Provisioning requires a Reporter activation key which can be obtained from the DataHub as follows:

Important:

Reporter *does not* require provisioning on a drilling rig.

Note:

Provisioning Reporter requires an active Internet connection.

1. Log on to the DataHub with the user account that will be used to provision Reporter.
2. Click the **Apps** tab. If the **Apps** tab is not present, you're missing a required privilege.
3. Click the **Reporter** link. If the **Reporter** link is not present, you're missing a required privilege.
4. Click **Continue**. The Reporter activation key displays.

Now that you have the Reporter activation key, follow the steps below with the Provisioning Wizard to set up the application for use:

1. Launch Reporter by double-clicking the desktop icon.
2. After Reporter launches, click **Next** on the welcome screen.
3. Select the country that matches the DataHub user account, select the service rig type, then click **Next**.
4. Enter the DataHub username and the Reporter activation key (copy and paste the key to avoid errors), then click **Next**.

Note:

Do not enter your DataHub password. If you have entered the DataHub username or the Reporter activation key incorrectly, an error message displays indicating that it's invalid.

5. Click **Update Picklist** to ensure you're using the most recent information from the DataHub. Select the correct Contractor, Business Unit, and Rig Number, then click **Next**.
6. Create a rig manager entry in the crew list, and assign the rig manager a password, then click **Next**.

Important:

This is the password you use to start Reporter. If it is forgotten or lost, Reporter needs to be re-provisioned. In this event, please contact Pason Technical Support for assistance at 1-877-255-3158 or TechSupport@pason.com.

7. Click **Finish** and log on using the rig manager password you created.

4 Starting Reporter

After Reporter is installed, a shortcut displays in the **Start** menu. Click **Start, All Programs, Pason**, then **Reporter**. Alternatively, double-click the **Reporter** shortcut on the desktop.

Each time you start Reporter, you need to log on. Select your name from the list, enter your password, and click the **Login** button.

Note:

Use the same password you created when Reporter was provisioned. See [Provisioning Reporter](#) on page 8 for more information.

5 Understanding Activity Types

Reporter uses a property called Activity Type that determines which functions are available to users. Reporter's Activity Type is determined by how Reporter was originally set up, or provisioned. There are two Activity Types in Reporter that relate to rig type: Drilling and Service.

5.1 "Drilling" Activity Type

- Enables users to access the drilling reports.
- Reporter installations provisioned while connected to a Pason Toolpush Computer (TPC) always use the Drilling Activity type.

5.2 "Service" Activity Type

- Enables users to access the Daily Work Record and Field Estimate features.
- Allows users to create wells, end wells, and edit Well ID.

6 Understanding Validation

6.1 Report Validation

Whenever Reporter receives new data by user entry, import, or carry forward, the system scans your report and lists any problems that it finds in the Validation Results pane. Validation Results lists three types of problems: Error, Warning, and Information. The Error, Warning, and Information messages are explained in detail below.

To show the Validation Results pane, click the show button above Validation Results to the right of the main screen. Click an issue in the list to display a description of the problem and a suggested resolution. When you click on an issue, Reporter jumps to the section of the report that contains the problem.



Error

An Error message indicates that the report contains invalid data that must be corrected. Reporter will not allow you to submit a CMR containing these types of errors.



Warning

A Warning message indicates that data is possibly invalid. You can submit a CMR with warnings, but you should review the warnings before doing so.



Information

An Information message indicates that data may be technically valid but was left blank or at the default value. You can submit a CMR with these types of problems, but you should review the problems before doing so.

6.2 Inline Validation

When you enter data in a field and press **Enter** or **Tab** to exit the field, Reporter checks the data to ensure that it is valid for that field.

If you have entered invalid data, Reporter prevents you from exiting the field and displays a popup that explains the problem. In these cases, press the **Esc** key to undo your last entry and enter valid information.

7 Drilling Rig Reports

Reporter can be set up to work on drilling rigs or service rigs. If you have it set up for drilling rigs, you can generate the following reports:

- Contractor Morning Report
- Employee Info Report
- Materials & Service Report

8 Using the Contractor Morning Report

The Contractor Morning Report (CMR) enables rig managers to create, edit, send, and print morning reports quickly and easily. These reports use information from the Pason Electronic Tour Sheet (ETS) and previous CMRs, reducing the need for data to be entered more than once. Some of the information from the tour sheet that relates to the specific reporting period can be imported to the CMR with the click of a button. Other information is carried over from previous reports, and may be edited as needed. The remaining information can be entered manually.

8.1 Setting Up CMR Preferences

Reporter enables you to set up and save CMR preferences. Once set up, Reporter uses these preferences whenever you open a CMR. You can change your preferences anytime, or click **Set to Defaults** at the bottom of the Options window to return to the default setup.

To set up or change your preferences, on the Reporter menu bar click **Tools, Options**, then the **Morning Report** tab. The following options require special attention:

Morning Report Cut Off Time

Use this drop-down list to select the cut off time to use when importing data from the Tour Sheet.

Note:

The Tour Sheet Date option only applies when a tour sheet expands more than a day. If the start time of the tour's first shift corresponds to the date of the Tour Sheet in the EDR, select **Day the sheet starts**. If the end time of the tour's last shift corresponds to the date of the Tour Sheet in the EDR, select **Day the sheet ends**.

Show populate message when report has already been submitted

Check this option if you would like a confirmation dialog to be displayed after a report is sent to the office.

Carry forward surveys from previous report (same well)

Check this option if you want surveys from previous reports to be carried forward to fill in the surveys section.

Populate operations at report time from the last time log entry

Check this option if you need operations at report time to be populated from the toursheet of the last log entry time.

Units

Use the drop-down lists to select the units of measurement Reporter displays in the CMR fields.

Note:

If the units for a field don't match reporter's units, then a conversion will occur on import. Once a report has been populated, then changing the units will not result in unit conversions.

8.2 Opening a CMR

In Reporter, you can create a new CMR or open a previous one. Note that whenever you start Reporter, it automatically creates a report for the current open well on the current date. You can find the date of the currently open CMR in the header.

Follow these steps to open a CMR:

1. Ensure that Reporter displays the correct well in the header. If not, select the well from the Well drop-down list.
2. Click the Create/Edit drop-down on the header to see the Reporter calendar. Any date on the Reporter calendar that displays an icon has a CMR associated with it. Any date on the calendar that displays a paper icon has a report that is incomplete, and any date that has an envelope icon indicates the report is sent or received (by the office).
3. Click the date you want to use for the new CMR (Reporter creates and opens a CMR for that date) or,
4. Click the date of the CMR you want to open. If the selected date has additional wells and reports associated with it, Reporter displays a message asking you which report you want to open.
5. To return to the current day's report, reopen the calendar and click on the current date.

8.3 Filling In a CMR

You can fill in CMRs using both manual and automated data entry. Reporter enables you to import information from Tour Sheets and Well IDs on the EDR, and to carry forward

information from previous CMRs. Reporter also includes a feature called Help Mode that visually shows you how CMR fields are populated.

Using Help Mode

When Help Mode is turned on, Reporter displays indicators on the CMR data fields that show you where the data originated.

To toggle this feature on and off, click **Help** on the Reporter menu bar, then click **Help Mode**. To quickly turn off Help mode, select the **Disable Help Mode** button next to the Help Mode Legend.

Reporter displays the following legend when enabled:

Well Id  **Tour Sheet**  **Calculation**  **Carry Forward**  **User Entry** 

Note:

The legend colours will not be printed with the report.

Well Id: Data comes from the EDR's Well Information on the Toolpush Computer (TPC).

Tour Sheet: Data comes from the Tour Sheet on the TPC. Simply type in the tour sheet fields to edit the Tour Sheet.

Calculation: Data comes from a Reporter calculation.

Carry Forward: Data comes from the last CMR. You fill in the carry forward fields once, for the well's first CMR. After that, you can carry forward this data to future reports for that well and from well to well on the same rig.

User Entry: Data is manually entered by the user.

Entering Data Automatically

Follow the steps below to have Reporter automatically enter data in a CMR:

Important:

If you plan to enter data both automatically and manually, it is a good idea to use the Populate feature before entering data manually. Doing this prevents the Populate feature from overwriting your manual entries.

1. Click **Populate** at the bottom of the CMR. The Populate window opens.
2. Use the check boxes to select which areas to populate.
3. To import data from the previous day's Tour Sheet, check **Import Tour Sheet**.

4. To carry forward information from the last CMR, check **Carry Forward from previous report**.
5. Click **OK**. The Populate Wizard displays values from the Tour Sheet.
6. Click **Next** to scroll through and review the values. Use the check boxes to select which value you want to import or use the Select All checkbox to choose all values. If the Tour Sheet uses multiple values, the wizard displays all of them.
7. When you complete your review, click **Finish**. Reporter imports the values you selected.

Entering Data Manually

Follow the steps below to manually enter data in a CMR:

1. Click in the field you want to edit. A cursor appears in the field.
2. Enter your information and press **Enter** or **Tab** to exit the field. Reporter checks the data to ensure that it is valid for the field. If the data is invalid, Reporter prevents you from exiting that field and displays a popup describing the problem. Press **ESC** to undo your last entry and re-enter the information.

Important:

Reporter automatically saves valid data as you enter it.

Editing Data

You cannot edit any field that is greyed out, or that displays grey text, but all other fields in a CMR are editable. Before you can edit fields that use data imported from the Tour Sheet, you need to unlock the fields as described in Editing Tour Sheet Data.

Note:

You cannot edit Well Id fields (pink in Help Mode Legend). These fields must be changed at the well.

8.4 Editing Tour Sheet Data

Reporter has a feature that enables you to edit data imported from the Tour Sheet. This feature should be used with caution for the following reasons:

- Editing these values in the CMR does not modify the values in the Tour Sheet. As a result, you will have information conflicts between the CMR and the Tour Sheet, which can lead to confusion.
- Whenever you import values from the Tour Sheet, the values you edited in the CMR will be overwritten and you may need to re-edit them.

Follow these steps to edit data imported from the Tour Sheet:

1. Click in the field you wish to edit. If the field is locked, a warning screen appears.
2. Review the warning screen and click **Yes** to proceed. Reporter unlocks the previously locked Tour Sheet data fields.

Note:

The Tour Sheet data fields will remain unlocked until you submit the CMR.

8.5 Backing up Reports

If you need to back up a report, you can export it to a TPC or to your local drive. When you back up a report, the entire database is exported (including the entire crew list, configuration, all reports and wells).

To export a database, follow these steps:

1. Click **Tools, Back Up Reports**. The Back Up Location window opens.
2. If saving to a TPC, select **TPC**. The report is backed up to the TPC.
3. If saving locally, select **Local**, enter a file name, then click **Save**. The report is backed up to the selected location.

8.6 Deleting a Report

In Reporter, you can delete a new report or delete a previous revision.

Follow these steps to delete a report:

1. Ensure that Reporter displays the correct well. If not, select the well from the Well drop-down list.
2. Click the Create/Edit drop-down on the header to see the Reporter calendar. Any date on the Reporter calendar that displays an icon has a report associated with it. Any date on the calendar that displays a paper icon has a report that is incomplete, and any date that has an envelope icon indicates the report is sent or received (by the office).
3. Select the report you wish to delete.
4. Click **Report**, then **Delete Report** in the Reporter menu bar.
5. Review the warning screen and select **Delete Report** if you wish to delete the current report and all its revisions, or select **Delete Revision** if there is more than one revision of the report and you wish to delete the last revision.

8.7 Exporting a Report

Reporter enables you to export reports in XML and PDF formats. Note that exporting a report is not the same as submitting a report. For more information, see [Submitting a report on page 20](#).

Note:

If you are in Canada, or if you have set up Reporter to use the CAODC tour sheet, Reporter exports reports using CAODC ETS specification version 3.0.4.

Follow these steps to export a report in XML or PDF:

1. Click **Report, Save As** in the Reporter menu bar.
2. Select the file type you would like to use for the report: PDF or XML.
3. Select a location, enter a file name, then click **Save**. Reporter saves the report in your selected format.

Follow these steps to view a report in PDF:

1. Click **Report, Print Preview** in the Reporter menu bar, or click the **Print Preview** button.
2. Reporter generates a PDF of the report and opens it in your default PDF viewer.
3. If you are satisfied with the preview, use your PDF viewer to save it.

8.8 Printing a Report

To print a report, follow these steps:

1. Click **Report, Print Preview** in the Reporter menu bar, or click the **Print Preview** button.
2. Reporter generates a PDF of the report and opens it in your default PDF viewer.
3. If you are satisfied with the preview, you can print the report from the PDF viewer.

Note:

If you have not yet submitted the report to the office, a "DRAFT" watermark appears on the printed output.

8.9 Restoring Reports

If you need to restore a report, you can import it from a TPC or from a local device.

To restore a report, follow these steps:

1. Click **Tools**, then **Restore Report**. The Restore Location window opens.
2. Select the location you wish to restore the data from.

3. If restoring from a TPC, select **TPC**.
4. If restoring from a local device, select **Local**, locate the file, then click **Restore**.

8.10 Submitting a Report

Once you have completed a report, you can send it to the DataHub where others can view it.

Follow these steps to submit a report:

1. Click **Send to Office** in the bottom right corner of the screen. Reporter checks the report for problems and, if there are any, displays a dialog box and a Validation Results list that includes descriptions of problems and their severity.
2. Review the Validation Results. You can submit reports with problems classified as Warnings or Informations, but you cannot submit reports with problems classified as Errors. If Reporter finds Warnings or Informations, you have two choices:
 - Click **Cancel** in the dialog box, fix the problems, and click **Send to Office** again, or
 - Click **Continue with submission** in the dialog box to submit the report without fixing the problems.

Note:

For more information about using validation, see [Understanding Validation](#) on page 12.

3. When you successfully submit a report, Reporter displays a message that the report is being sent to the DataHub, and changes the status indicator in the top right corner from Incomplete to Sending to Office. When Reporter completes the sending process, it changes the status indicator to Received by Office.

Note:

The first submitted report for a well is Revision 0.

Re-Submitting a Report

You can make changes to and re-submit reports as often as you like. When you change a report that has already been sent to the office, Reporter increases the revision number and changes the status indicator to Incomplete. Whenever you re-submit a report, the re-submitted version will be the only version available on the DataHub.

9 Using the Materials and Service Requisition Report

The Materials and Service Requisition Report is a tool used to request and track purchases of materials and services.

To generate a Materials and Service Requisition Report:

1. Click the **Materials & Service** tab. The current contractor, date, rig number, and job number are applied by default.
2. Enter the ordering and shipping information in the top section of the tab.
3. For each item or service you are requisitioning, type the quantity and details in the item section of the tab.
4. Type your name in the Approved By field.
5. When the report is complete, click **Print Preview** to print, or click **Send to Office** to send the report to the office.

10 Using the Employee Information Report

The Employee Information Report is a tool used to record and update the contact and work information of crew members.

To generate an Employee Information Report:

1. Click the **Employee Info** tab. The current rig number is applied by default.
2. For a new hire, re-hire, or transfer, enter the personal information in the top section of the tab.
3. For change of status, including a promotion, transfer, disciplinary action, suspension, termination, or voluntary quit, fill in the corresponding information in the tab.
4. When the report is complete, click **Print Preview** to print, or click **Send to Office** to send the report to the office.

11 Using the Service Tour Sheet

The Service Tour Sheet is a log of all information pertaining to the work done each day on the rig.

Note:

Changes to content on any of the service tour sheet pages is saved automatically.

Reporter can be set up to work on drilling rigs or service rigs. If you have Reporter set up, or provisioned, for service rigs, you can generate reports with the following tour sheet categories:

- Calendar - Displays the date for which the work record is being created.
- Header - A summary of important rig information, including the contractor, operator, and well.
- Casing and Tubing
- Fluids - Tank and fluid information.
- Details of Operation - Displays a log of all work done each day.
- Safety - Contains information about safety events each day.
- BOP Testing - Contains details related to blowout preventer testing.
- Well Servicing - A record of costs billed to the operator by the contractor.
- Boiler Charges - Displays the boiler-related costs charged to the rig.
- Consumables - Contains consumable items entered on the daily work record.
- Third-Party Equipment - Shows the costs of services provided by third-party companies.
- Billing Summary - Displays the accumulated costs charged to the rig.
- Crew Details - Contains information related to the active crew for each day.
- End of Employment - Add details about how employees end their employment.
- Hours of Service - A tool used to record the driving activities of crew members.
- Authorization - Requires sign off after the report has been completed.
- **Error! Reference source not found.** - Shows weather-related information.
- **Error! Reference source not found.** - Contains information about the well or job for which the daily work record is being created.

11.1 Managing Wells

In Service Activity mode, you can use Reporter for the following well tasks:

- Create a New Well
- End a Well
- Open an Existing Well

Create a New Well

If Reporter is in Service Activity mode, you can use it to create a well. Note that if Reporter is in Drilling Activity mode, you can only access active wells on the EDR—you cannot create wells.

Follow these steps to create a new well:

1. Click the Well drop-down list, then click **Create New Well**. The Well Identification window opens.
2. Enter the well identification information. The following fields are mandatory:
 - All fields in the Location box
 - Contractor
 - Country
 - County (US only)
 - Operator
 - Rig Number
 - Start Date
 - Start Time (automatically rounded to the nearest 15 minutes)
 - State / Province
 - Unique Well ID
 - Well Name
3. Click **Create Well**. The new well opens.

End a Well

If Reporter is in Service Activity mode, you can use it to end a well that has been created in Reporter.

Follow these steps to end a well:

1. Click **End Well**. The Well Identification screen opens.
2. Enter the well identification information. The following fields are mandatory:

- End Date
 - End Time (automatically rounded to the nearest 15 minutes)
3. Click **End Well**.

Open an Existing Well

To open an existing well, click the Well drop-down list in the top left corner, then select the name of the well from the list.

11.2 Calendar

Calendar enables you to select the date of the report.

Follow these steps to select the date:

1. Click the down arrow next to the date. A calendar opens.
2. Click on a date to select it. The selected date is highlighted in orange.
 - Click < to go to the previous month.
 - Click > to go to the following month.
 - Click ? to display the calendar icon legend.

11.3 Header

The header is a summary of important rig information, including the contractor, operator, and well.

To enter header details:

1. Click **Header**. The Header page opens.
2. Enter the required information for the contractor.
3. In the Home Terminal field, enter the address of your home equipment terminal.
4. Enter the required information for the operator.
5. Select a rig manager from the drop-down list.
6. Enter the rest of the rig information.
7. Select a well type.
8. Select a job type.
9. Enter the well information.
10. Enter the environment information.

11.4 Casing and Tubing

Casing and Tubing shows the inventory and specifications for casing and tubing on the rig.

To enter casing and tubing details:

1. Click the **Casing and Tubing** tab. The Casing and Tubing page opens.
2. Enter the specifications and inventory for the casing, tubing, rods, and ponies.

11.5 Fluids

Fluids shows tank and fluid information.

To enter fluids details:

1. Click the **Fluids** tab.
2. For each tank, enter the specifications for the type of fluid, and any volume details for that tank.

11.6 Details of Operation

Work Details is a log of the different types of work done each day. Existing job types are available for selection in the Code drop-down menu.

Follow these steps to enter work details:

1. Click the **Work Details** tab. The work log opens.
2. Enter times in the From and To fields (Hours are calculated automatically).
3. Select an option from the Code drop-down menu.
 - You can enter a custom message in the Detailed Description field.
 - To add an item in the middle of the list, right-click, then select **Insert a Row**.

11.7 Safety

Safety is a record of daily safety tasks and events.

Follow these steps to enter safety details:

1. Click the **Safety** tab. A list of safety tasks opens.
2. Check the items that are relevant for the day.

Note:

You must check the **Emergency Engine Kill** option before sending the report.

11.8 BOP Testing

A BOP (blowout preventer) test must be performed regularly.

Follow these steps to enter BOP test details:

1. Click the **BOP Testing** tab. The BOP Test page opens.

2. In the BOP Function table, enter the test result values for each function.
3. In the Accumulator section, enter the test details for the accumulator.
4. In the BOP Drill section, enter the time taken for the BOP drill.
5. In the N2 Bottle Pre-charge Pressures section, enter the values for the pre-charge nitrogen bottle pressures.
6. In the N2 Backup Bottle Pre-charge Pressures section, enter the values for the pre-charge backup nitrogen bottle pressures.

11.9 Well Servicing

Well servicing is a record of costs billed to the operator by the contractor.

To enter billing details, follow these steps:

1. Click **Well Servicing**. A list of billable items opens.
2. Enter the quantity of each billable item.
3. Enter the rate for each item (code, description, and unit information are filled in automatically).

To add a consumable item not included in this list, use the Consumables tab.

11.10 Boiler Charges

Boiler Charges is a record of boiler costs billed to the operator by the contractor.

To enter boiler charges:

1. Click **Boiler Charges**. A list of charges opens.
2. Enter the rate of each billable item.

11.11 Consumables

Consumables is a list of consumable items that were not already billed in well servicing and boiler charges.

To enter consumables charges:

1. Click **Consumables**. A list of charges opens.
2. Enter the quantity and price of each billable item.

11.12 Third-Party Equipment

Third-Party Equipment displays a record of equipment provided by external companies.

To enter third-party equipment information:

1. Click the **Third-Party Equipment** tab. A list of items opens.
2. Select the equipment from the Description drop-down list.
3. Enter the supplier, a purchase order number, and a cost.

11.13 Billing Summary

The Billing Summary calculates the total cost of the well servicing, boiler charges, consumables, and third party equipment. To create a billing summary:

1. Click the **Billing Summary** tab. The billing summary is calculated automatically from the information in the well servicing, boiler charges, consumables, and third party equipment tabs.
2. Enter the operator billing information.

11.14 Crew Details

Crew Details is a record of crew-related information.

Follow these steps to enter crew details:

1. Click the **Crew Details** tab. The crew list opens.
2. Select a wage zone.
3. Select whether vehicles over 4500 kg in weight were used.
4. From the Camp Provider drop-down list, select which party (contractor or operator) is responsible for crew accommodations.
5. From the Fuel Provider drop-down list, select which party (contractor or operator) provides fuel.
6. To make changes to individual crew members, select the crew member's name from the Name drop-down list. The Employee No and Position fields are filled in automatically.
7. From the SRCP drop-down list, select the service rig competency program training level of the employee.
8. In the Start Time field, enter the time the employee started the work day. This may be before the start of the tour.
9. In the End Time field, enter the time the employee finished work for the day. This may be after the end of the tour. The Hrs of Work field is filled in automatically.

Enter other information as necessary:

Rig Hours - Enter the total number of hours a crew member worked on the rig.

Extra Labour - Enter the total number of hours a crew member worked away from the rig.

Down Time - Enter the total number of hours a crew member was not working.

Over Time - Enter the number of hours a crew member worked overtime.

Travel Time - Enter the number of hours an employee spent travelling to and from the rig site.

Break Time - Enter the number of hours the employee was on breaks.

Subsistence - From the drop-down list, select which accommodations the crew member should be paid for this tour (Camp, Texas Camp, Hotel, or Full).

PPE - Select this check box if the employee has all of the personal protective equipment required for the job.

Vehicle - Select the vehicle that was used if a crew member travelled during working hours.

Km - Enter the number of kilometres travelled by a crew member.

Injury - Select this check box if an employee sustained an injury during working hours.

H2S - Enter the number of hours a crew member worked in high pressure or hydrogen sulphide conditions.

Sign Off - Click Sign Off when all of a crew member's information has been entered and verified.

Note:

Rig managers can sign off any crew member, while crew members can only sign themselves off.

11.15 End of Employment

Use End of Employment to add details about how employees end their employment.

To enter End of Employment details:

1. Click the **End of Employment** tab. The End of Employment page opens.
2. Select the **ROE** check box if a record of employment has been issued.
3. Select the **Quit** check box if the employee quit.
4. Select the **Fired** check box if the employee was fired.

5. Enter any additional notes about the employee's end of employment.

11.16 Hours of Service Report

Use the Hours of Service report to record the driving activities of crew members. Crew members added in the Crew Details tab are automatically included in the Hours of Service tab.

To enter hours of service details:

1. Enter the ID number for the vehicle used by the employee.
2. In the From Location field, enter the start location of the trip.
3. In the To Location field, enter the end location of the trip.
4. In the Driving field, type the number of hours spent on duty driving. The Off Duty field is calculated from the Hours of Work value in the Crew Details tab, and the Non Driving field is calculated once you enter the Driving hours.

11.17 Authorization

Authorization is the last step in the creation of a service tour sheet. When you authorize a report, your sign off means that it's complete and correct, so it's a good idea to look the report over thoroughly before authorizing it.

Note:

Only the contractor's (rig manager's) sign off is mandatory. The contractor must sign off before the operator. Once the contractor signs off the daily work record, it can no longer be modified.

To authorize a daily work record:

1. Verify that all of the information in the report has been entered correctly.
2. On the Authorization tab, click **Sign Off**.
3. Select your name from the User drop-down list and enter your password.
4. Click **Sign Off**. The report status changes to "Signed Off".

Note:

If the report has errors, Reporter doesn't allow you to authorize it. Check the Validation Results pane for error messages.

12 Sending, Printing, and Exporting Reports

Once a report has been signed off, you have several options:

- Export a Report– Create an XML or PDF version of the report.
- Printing a Report– Preview the report and print a paper copy.
- Send to Office– Submit the report to head office.
- Revise a Report– Remove the authorization signature to unlock the daily work record and make changes.

12.1 Send to Office

Once a report is complete and signed off, it is ready to be sent to the office.

Note:

The field estimate does not need to be signed off before it is sent to the office.

To send a report to the office, click the **Send to Office** button. The report is sent to the Pason DataHub and the report status changes to "Sending to Office". Once received by the DataHub, the report status changes to "Received by Office".

12.2 Printing a Report

To print a report, follow these steps:

1. Click **Report, Print Preview** in the Reporter menu bar, or click the **Print Preview** button.
2. Reporter generates a PDF of the CMR and opens it in your default PDF viewer.
3. If you are satisfied with the preview, you can print the CMR from the PDF viewer.

Note:

If you have not yet authorized the Daily Work Record or sent the Field Estimate, a "DRAFT" watermark appears on the printed output.

12.3 Export a Report

If you want to export a report, you can save an XML file to your local hard drive.

Follow these steps to export a report:

1. Click **Report, Save As** in the Reporter menu bar.
2. Select a file type you would like to save the report as; PDF or XML.
3. Select a location, enter a file name, then click **Save**. The report is then saved in the applicable format to the selected location.

13 Making Changes

Reporter provides several methods to make changes to the information you enter in a report:

- Edit Options– Make changes to Reporter settings.
- Edit Well ID– Modify the well-specific information.
- Manage Crew– Make changes to crew information.
- Revise a Report– Revise the report after it has been authorized.
- Expert Mode– Modify items that are generally locked from editing in the report.

13.1 Edit Options

Options permits you to change settings in Reporter. The General tab enables you to make global changes to units such as currency, depth, or temperature. The other tabs reflect report-specific settings.

Follow these steps to enter options:

1. Click **Tools**, then **Options**.
2. Select a tab and change the settings.
3. Select **OK** if you want to save the settings, **Cancel** if you don't want to save the settings, or **Apply** if you want to apply the settings to the report.

Important:

Changing these settings will affect present and future reports and jobs. Don't change these settings unless you need to.

13.2 Edit Well ID

You are only able to edit Well ID information if Reporter is in Service Activity mode and the Well was created in Reporter. In Drilling Activity mode, Well ID information is being provided by the EDR for the active well, so you are not able to edit it.

Follow these steps to edit the well identification:

1. Click **Edit Well ID**. The Well Identification screen opens.
2. Make the necessary changes, then click **Save Changes**.

13.3 Expert Mode

Expert mode enables you to correct well information or options that are generally locked from editing.

Note:

Improper changes while in expert mode can affect how data such as payroll is sent and stored on the DataHub.

To enter expert mode, follow these steps:

1. Click **Tools**, then **Expert Mode**.
2. Choose **Edit Well ID...** or **Options...** A Reporter popup appears instructing that you must contact Pason to obtain the Expert Mode unlock key.
3. Once you enter the unlock key, Reporter unlocks the previously locked fields so you can edit them. In general, locked fields use a grey background.
4. When finished, click **OK** on the Options window to exit Expert Mode.

13.4 Manage Crew

You can only change crew information that was created in Reporter. Crew information downloaded from the DataHub cannot be changed.

Add a Crew Member

Follow these steps to add crew members:

1. Click **Tools, Manage Crew**. The crew list opens.
2. Select the new crew member's position, then enter that person's name, ID, initials, and password.

Note:

Initials have a limit of 4 characters and cannot duplicate another crew member's initials. If a password is assigned to a crew member, that crew member must set valid initials.

3. Click **Set**, have the crew member enter a password, then click **Set Password**.
4. Click **Save and Close**.

Note:

Not all crew members require passwords. Only crew members who are logging into Reporter, signing off the crew list, or signing off reports need a password.

Delete a Crew Member

Follow these steps to delete crew members:

1. Click **Tools, Manage Crew**. The crew list opens.
2. Select a crew member, then click **Delete** on each field, or select the row using **Shift + Delete** to delete the entire row. A confirmation screen opens.
3. Click **Yes**.
4. Click **Save and Close**.

Change a PIN

Important:

Each crew member must have a unique password.

To change a crew member's password, follow these steps:

1. Click **Tools**, then **Manage Crew**. The Crew Members window opens.
2. Click **Change** in the Password column. The Change Password for [Crew Member's Name] window opens.
3. Ask the crew member to enter his/her password information, then click **Change Password**.
4. Click **Save and Close**.

Import a Crew List

To import a crew list, follow these steps:

1. Click **Tools, Manage Crew**. The crew list opens.
2. Select **Import Crew List**. The Import Crew window opens.
3. Select the checkbox to the left of the crew member you want to import, then click **Import**. The crew member you selected will now be in the crew list.
4. Click **Save and Close**.

Note:

A popup will notify you if there are no crews available for import from the DataHub.

13.5 Revise a Report

If a report has been sent to the Pason DataHub, its revision number increases to show that it is the newest version.

Contractor Morning Report

To revise a CMR, make the changes and re-submit it using **Send to Office**. You can re-submit a CMR as many times as you like, but be aware that whenever you re-submit a CMR, the re-submitted version will be the only one available on the DataHub.

Daily Work Record

Follow these steps to revise a daily work record that has previously been authorized:

1. Click the **Authorization** tab.
2. Click **Remove Signature**.
3. Make the required changes.
4. Re-authorize the report.

Field Estimate

Follow these steps to revise a field estimate that has already been sent to the office:

1. Click the **Revise** button. A popup displays.
2. Select **Yes**. You can now revise the report.

14 Backing Up Reports

Using Reporter, you can back up or restore your report database. Select one of the two options:

- Back Up Reports
- Restore Reports

14.1 Back Up Reports

If you need to back up a report, you can export it to your local hard drive. When you back up a report, the entire database is exported (including the entire crew list, configuration, all reports and wells).

Follow these steps to export a database:

1. Click **Tools, Back Up Reports**. The Back Up Reporter Database window opens.
2. Select a location, enter a file name, then click **Save**. The report is backed up to the selected location.

14.2 Restore Reports

If you need to restore a backed up report, you can import it from your local hard drive. When you restore a report, the entire database is restored (including the entire crew list, configuration, all reports and wells).

To import a database, follow these steps:

1. Click **Tools, Restore Reports**. The Restore Reporter Database window opens.
2. Locate the report, then select it.
3. Click **Open**. The report will be restored.

15 Troubleshooting

If you are having problems with Reporter, contact Pason Technical Support at 1-877-255-3158 or TechSupport@Pason.com for assistance.

The following links can also help with troubleshooting:

- [Diagnostics](#)
- [Locating Log Files](#)

15.1 Diagnostics

Diagnostics displays diagnostic information suitable for troubleshooting.

To run diagnostics, follow these steps:

1. Click **Tools**, then **Diagnostics**. The Diagnostics window opens.
2. Review the diagnostics reports tabs:
 - **Standard** – Displays an overview of the Reporter program's current health.
 - **Advanced** – Displays a list of all loaded components and their versions.
 - **Logs** – Displays a list of event logs, which can be used by Pason Technical Support for troubleshooting.
3. Click **Re-run Diagnostics** to update the display with fresh data.
4. Click **OK** to close the Diagnostics window.

15.2 Locating Log Files

If you are experiencing problems with Reporter, a Pason Technical Support Centre analyst may require log files to assist with troubleshooting your system.

Important:

If Reporter is working correctly, there is no need to obtain these logs. In most cases when there is a problem, a copy of these logs will help with troubleshooting.

The log file location varies based on the version of Windows that is installed on your computer. Identify your computer's Windows version (listed below), and follow the instructions.

ESR Laptop

Follow these steps to find log files:

1. Click **Start**, then **Run**. The **Run** window opens.

2. Copy and paste C:\Documents and Settings\Operator\Local Settings\Application Data\Pason\Reporter\Logs into the **Run** window.
3. Click the **OK** button.

The logs are organized by date and time when Reporter was launched.

Windows Vista, Windows 7

Follow these steps to find log files:

1. Click the **Start** button. The **Start** window opens.
2. Copy and paste C:\Users\[USERNAME]\AppData\Local\Pason\Reporter\Logs into the **Search** box at the bottom of the menu.
3. Replace [USERNAME] with the Windows username of the user that is currently logged in.
4. Click the **Enter** button.

The logs are organized by the date and time when Reporter was launched.