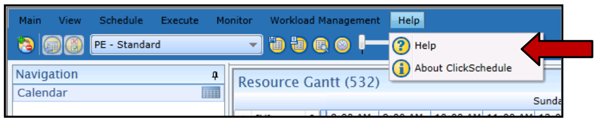
Table of Contents

Accessing Help Menu

Use the following steps to get application help in ClickSchedule.

1. Click **Help** in the **Menu** bar or click the button in the **Tool** bar.

A sub-menu with two options displays

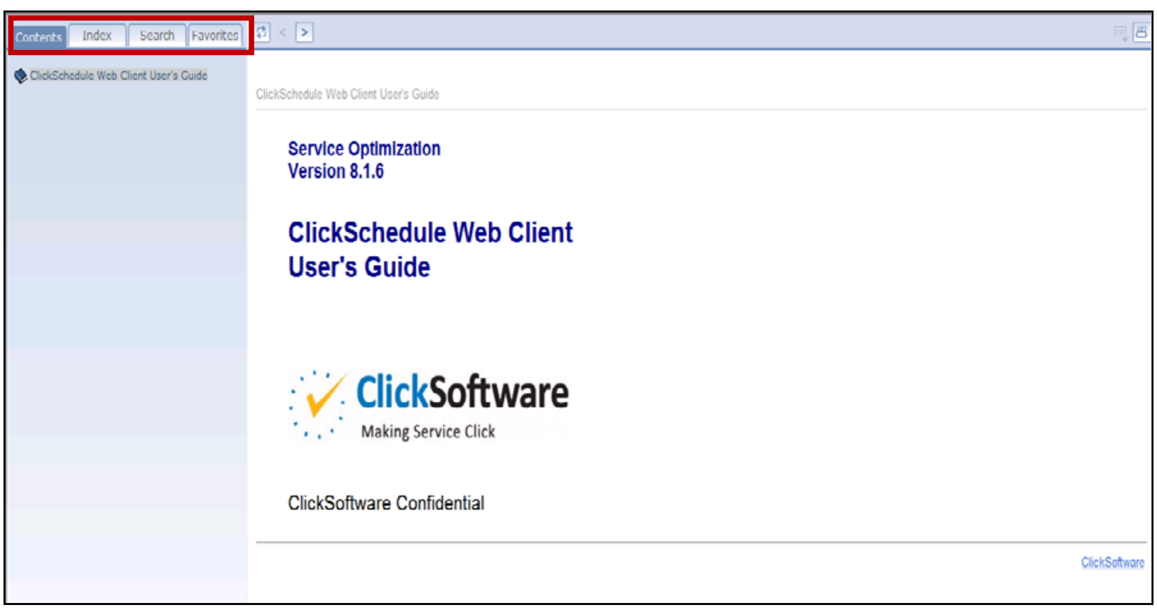


2. Click the **Help** option from the sub-menu. The ClickSchedule Web Client user guide opens in new window. On the top-left corner of this window, there are four tabs: **Contents**, **Index**, **Search**, and **Favorites**.

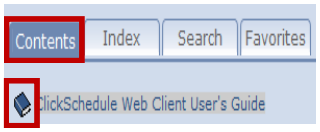
OR

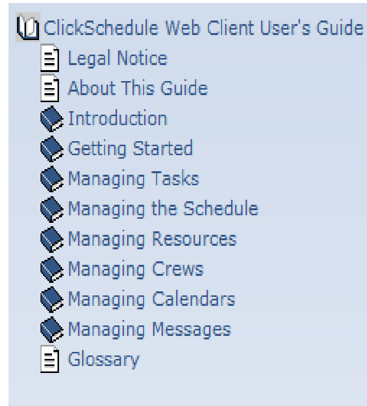
1. Click the button from the **Tool** bar.

The ClickSchedule Web Client user guide opens in new window. On the top-left corner of this window, there are four tabs: **Contents**, **Index**, **Search**, and **Favorites**.

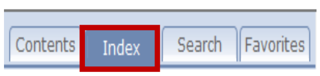


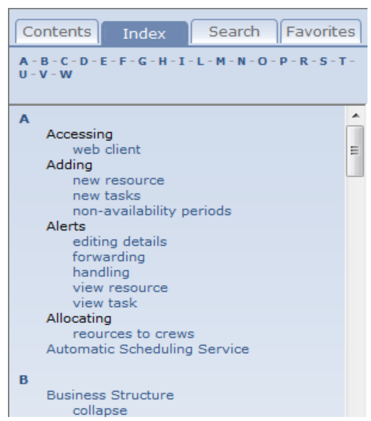
- If you click the  button below the **Contents** tab, a table of contents displays. From here, you can click to open any topic.



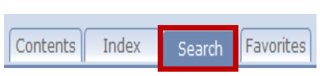


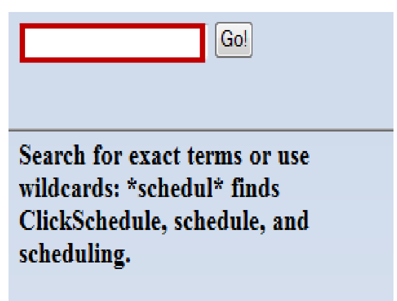
- If you click the **Index** tab, an alphabetical list of help topics displays.





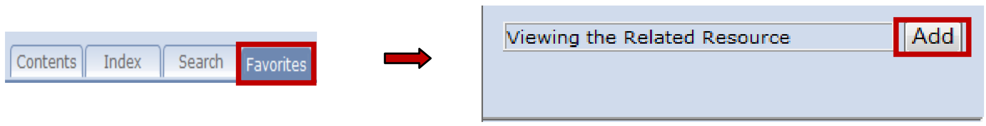
- If you click the **Search** tab, it opens with the space provided to enter a keyword for search.





  - Enter the required keyword in the space proived.
  - Click **Go**. If the keyword matches the search, the topic or content displays.

- You can add a topic to your Help **Favorites** by clicking the **Add** button within the Favorites tab.

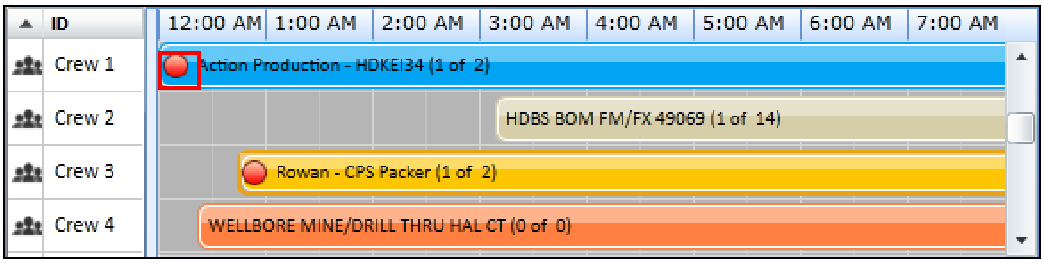


Alerts in ClickSchedule

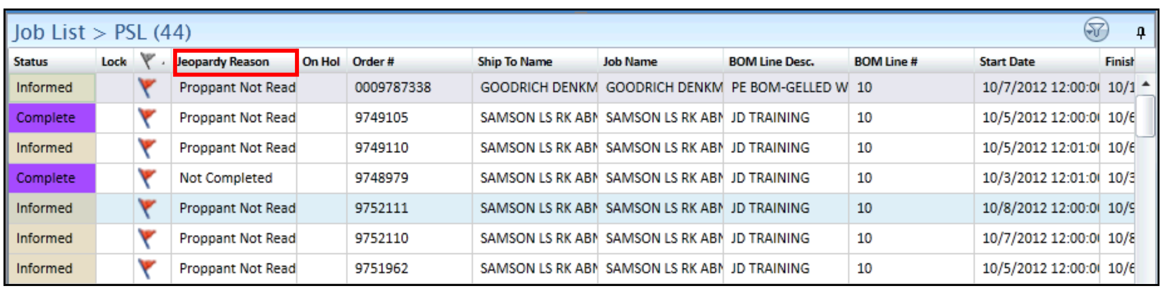
ClickSchedule provides an automated alerting mechanism to notify users of specific events (issues) related to the schedule and the activity around normal business workflow. Alerting is an automated process that happens in the background; however, alerts can also be entered manually in ClickSchedule.

When an alert state is hit, a job is flagged as **In Jeopardy** as shown below.

1. On the **Gantt**, the red circle indicates that a job has been marked as **In Jeopardy** because of a system alert.



2. In the **Job List**, the **Jeopardy Reason** is displayed.



Status	Lock		Jeopardy Reason	On Hol	Order #	Ship To Name	Job Name	BOM Line Desc.	BOM Line #	Start Date	Finish
Informed			Proppant Not Read		0009787338	GOODRICH DENKM	GOODRICH DENKM	PE BOM-GELLED W	10	10/7/2012 12:00:0	10/1
Complete			Proppant Not Read		9749105	SAMSON LS RK ABI	SAMSON LS RK ABI	JD TRAINING	10	10/5/2012 12:00:0	10/6
Informed			Proppant Not Read		9749110	SAMSON LS RK ABI	SAMSON LS RK ABI	JD TRAINING	10	10/5/2012 12:01:0	10/6
Complete			Not Completed		9748979	SAMSON LS RK ABI	SAMSON LS RK ABI	JD TRAINING	10	10/3/2012 12:01:0	10/3
Informed			Proppant Not Read		9752111	SAMSON LS RK ABI	SAMSON LS RK ABI	JD TRAINING	10	10/8/2012 12:00:0	10/9
Informed			Proppant Not Read		9752110	SAMSON LS RK ABI	SAMSON LS RK ABI	JD TRAINING	10	10/7/2012 12:00:0	10/8
Informed			Proppant Not Read		9751962	SAMSON LS RK ABI	SAMSON LS RK ABI	JD TRAINING	10	10/5/2012 12:00:0	10/6

The following table summarizes required alerts and their matching conditions for all the Product Service Lines (PSLs).

Alert	Description	Status	Applicable To
Not Acknowledged	After the Scheduler schedules a job to the crew and notifies the Field Resource, there is a set period of time by which the Field Resource needs to acknowledge that he/she has received the job. If the assigned Field Resource does not acknowledge within 72 hours, the system alerts the user that the job status has not changed yet.	**Not-Acknowledged**	All PSLs
Not Completed	The job was due to complete (finish time) 24 hours ago. The job status is still **Not**	**Not-Completed**	All PSLs

	Complete.		
Late Onsite	Job start time has passed by 2 hours and the Mobile Lead User has not yet indicated that the team is onsite.	**Late-OnSite**	All PSLs
Customer Has Not Confirmed	This alert is applicable to Will Call jobs. If the customer does not contact the Scheduler for Will Call jobs by certain date/time, the jeopardy agent changes the jeopardy status to **Customer-Not-Confirmed**.	**Customer-Not-Confirmed**	All PSLs
Proppant Not Ready	Each job will have a property identifying if the Proppant is ready for the job. If the materials are not ready 96 hours before the job is scheduled to start, the alerting agent will flag the job as **In Jeopardy**.	**Proppant-Not-Ready**	Production Enhancement
Insufficient HHP Allocated	For each job, the necessary amount of HHP is specified in the job and potentially adjusted by the Scheduler. The total of HHP already allocated to the crew for the job is calculated and can be compared with the required amount. If the allocated HHP is less than the required amount and the job starts in 48 hours, the alerting agent will flag the job as **In Jeopardy**.	**HHP-Under-Allocated**	Production Enhancement
Chemicals Not Ready	Each job will have a property identifying if the chemicals are ready for the job (this property will be a checkbox on the **Checklist** tab on the **Job Form**.) If the materials are not ready 96 hours before the job is scheduled to start, the alerting agent will flag the job as **In Jeopardy**.	**Chemicals-Not-Ready**	Production Enhancement
Cement Testing Not Completed	Some jobs require cement testing before completing the job. This will be a flag on the job form (Testing Complete). If the team on site completed the job without testing the cement, the jeopardy agent will change	**Cement-Requires-Testing**	Cementing

	the jeopardy status to **Cement-Requires-Testing** within 72 hours from job completion.		

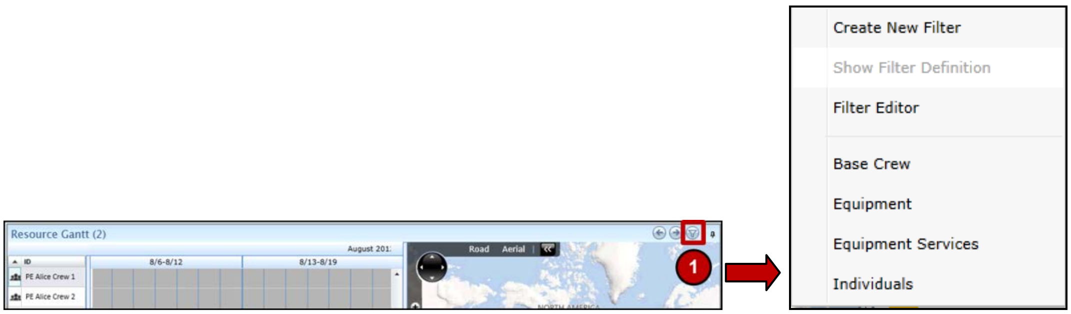
Allocating Resources to a Crew from the Resource Gantt

Schedulers are responsible for assigning resources to a crew within ClickSchedule.

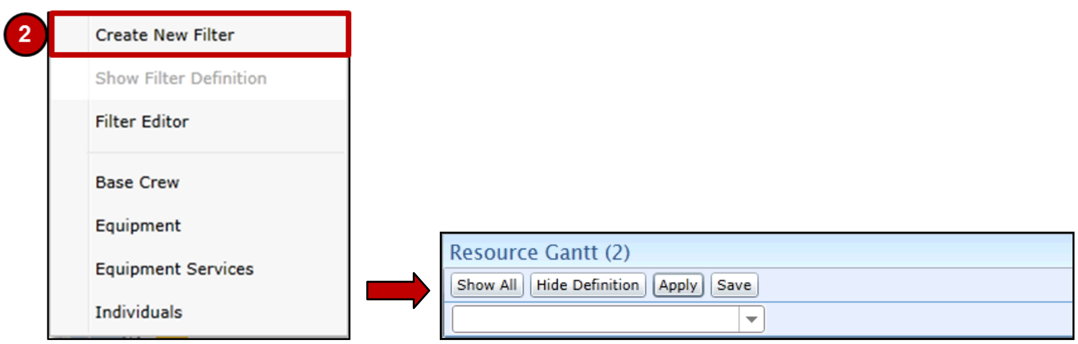
Use the following steps to allocate resources to a crew from the **Resource Gantt** chart:

> **Note**: Crew must be created in ClickSchedule first.

1. In the **Scheduling** view, click the **Filter Operations**  button located on the top-right corner of the **Resource Gantt** chart. A list of options displays.

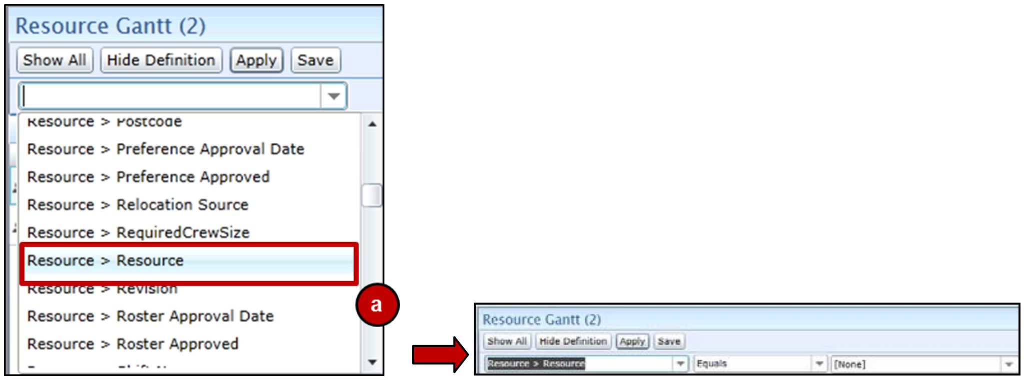


3. Select the **Create New Filter** option. The Filter area displays below the **Resource Gantt** header.

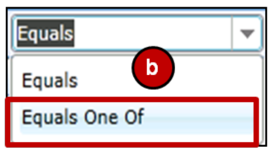


4. Define the filter criterion as follows:

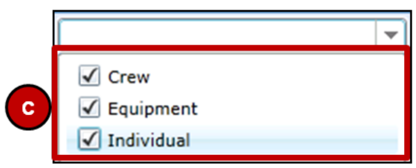
   a. Select the **Resource > Resource** option from the drop-down list. Two new drop-down lists display.



b. Select the **Equals One Of** option from the middle drop-down list.

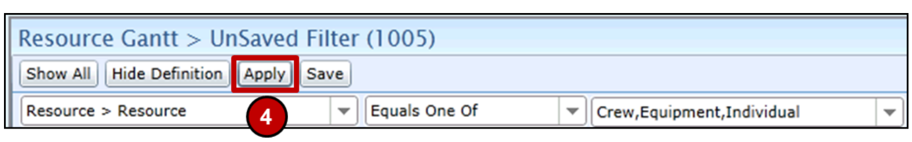


c. In the third drop-down list, select the checkbox against the type of resource that needs to be displayed in the **Resources List** in the **Resource Gantt** chart.

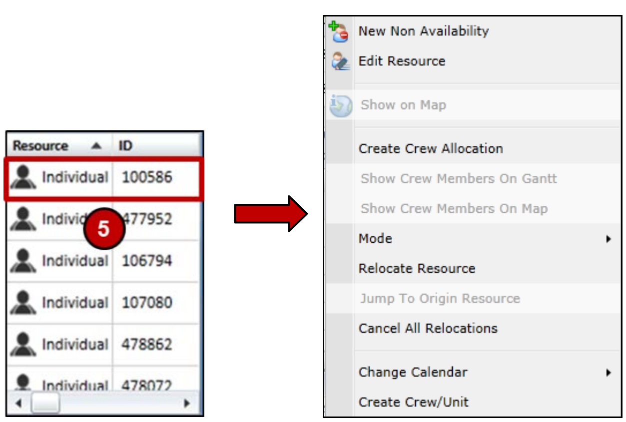


Note: You can select any one checkbox or all of them.

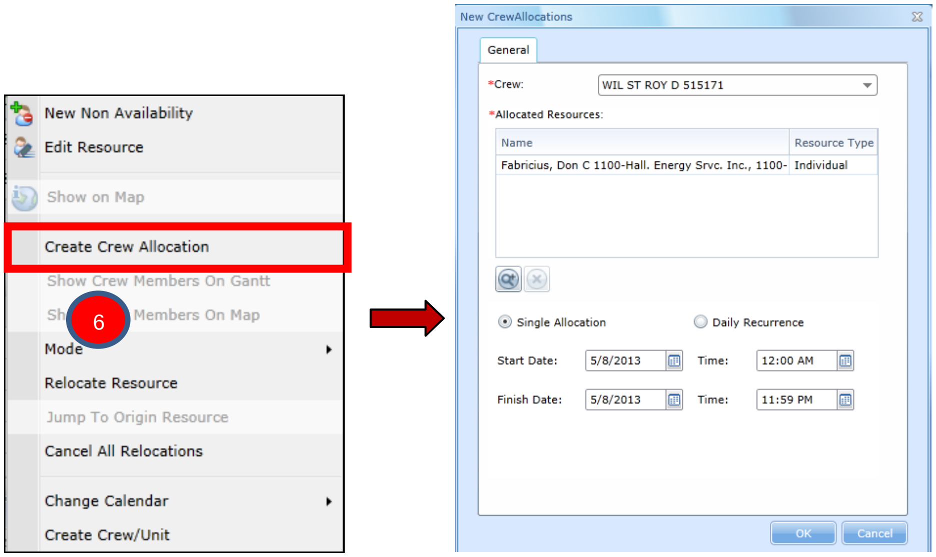
4. Click the **Apply** button. All the required resources display in the **Resources List**.



5. In the **Scheduling** view, right-click any resource (in this example an individual) in the **Resources List**. A list of options displays.



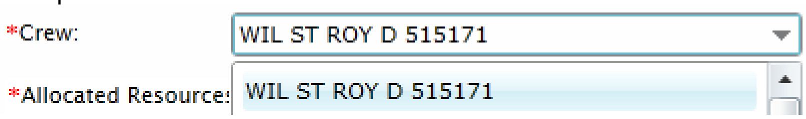
6. Select the **Create Crew Allocation** option. The **New CrewAllocations** form displays.



Note: The resources should be assigned to a shift before they are allocated to any crew.

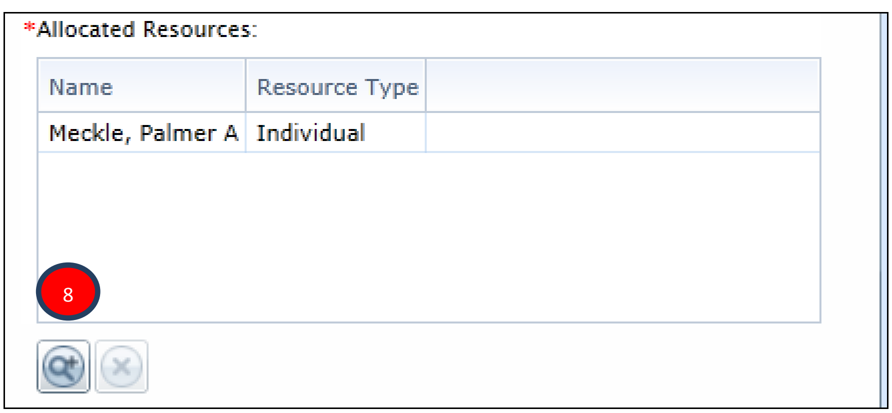
Note: Fields marked with a red * are mandatory fields.

7. Use the drop down menu to select the crew's

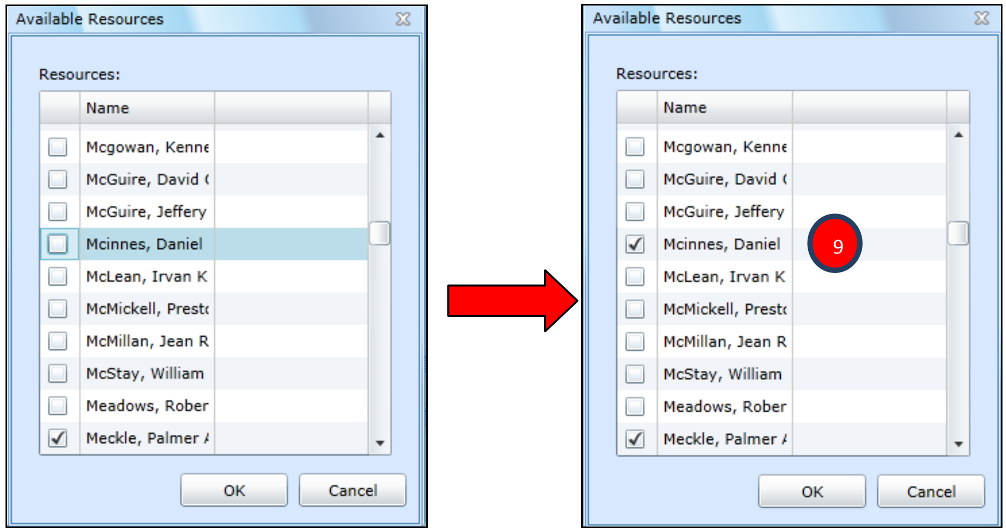


name.

Note: In the **Allocated Resource** field, the **Name** and **Resource Type** is automatically populated by performing Step 5.



8. Click on the **Search and Add** icon,  A pop up window, *Available Resources* appears.

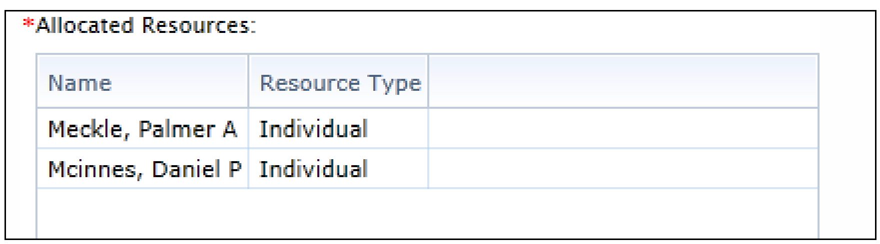


9. Click inside the check box, , next to the **Name** to be added to the Crew.

   Note: Multiple selections can be made. Use the scroll bar to the right to scroll for resources and select resources.

10. Click OK.

    Note: The selected resources now appear on the **Allocated Resources** list.

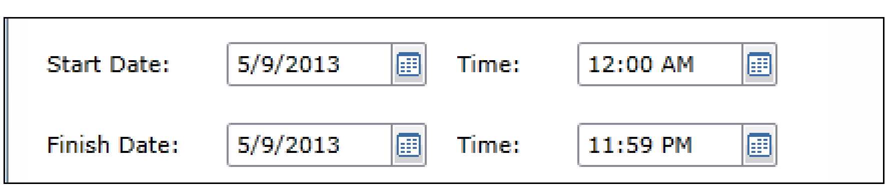


11. Verify that the radio button for **Single Allocation** is set Single Allocation.

    Note: Do not use **Daily Reocurrence**, since this functionality is not part of Halliburton's **ClickSchedule** platform**.**

12. Select the **Start Date** by clicking the **Calender** icon

13. Select the Start **Time** by clicking the **Time** icon .



14. Select the **Finish Date** by clicking the Calender icon, .

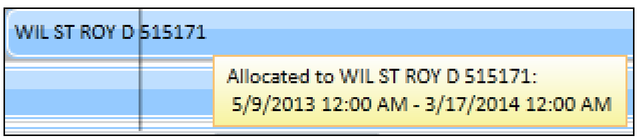
13. Select the Finish **Time** by clicking the Time icon, .

    Note: Start Date, Start Time, Finish Date and **Finish Time** can also be entered manually.

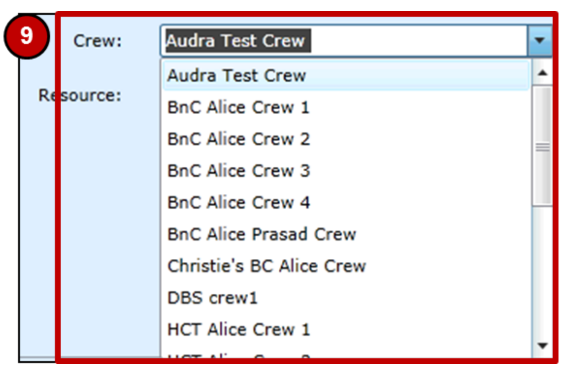
15. Click OK.

Result: Resource allocated to the **Crew** is graphically displayed in the **Resource Gantt** chart by the blue bar indicating which Crew the Individual Resource is allocated to.

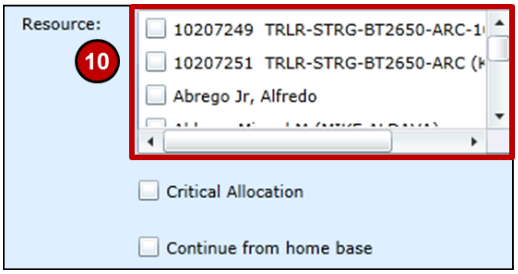
Note: With the mouse, hoover over the allocation bar, a pop up bubble appears indicating the allocation period for which the individual is assigned to the crew.



9. From the **Crew** drop-down list, select the name of the crew to which the individual needs to be allocated.

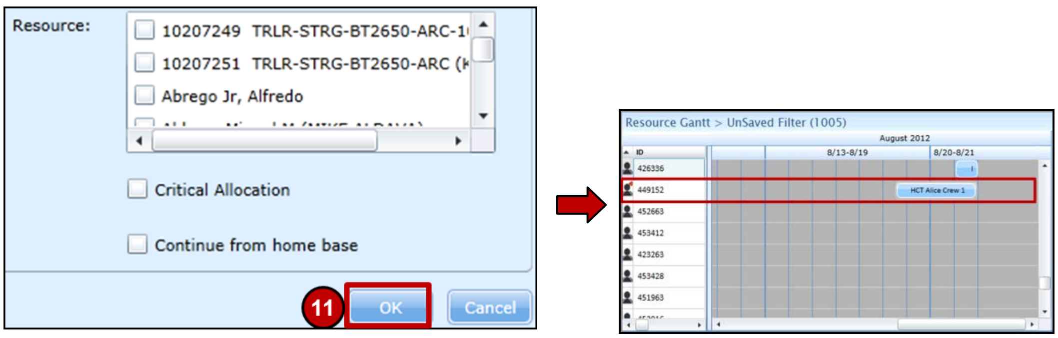


10. In the **Resource** section, select/verify the checkbox for the resource that needs to be allocated to the crew.



Note: If you want to allocate other individuals to the same crew for the same timeframe, select the checkboxes for each required individual.

11. Click **OK**. The crew name appears against the individual's name for the specified dates on the **Resource Gantt** chart.



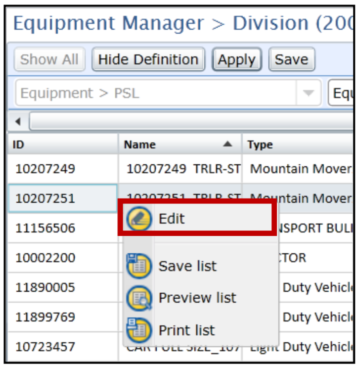
To allocate equipment to a crew, right-click any equipment in the **Resources List** and perform steps 6 to 11 as explained above.

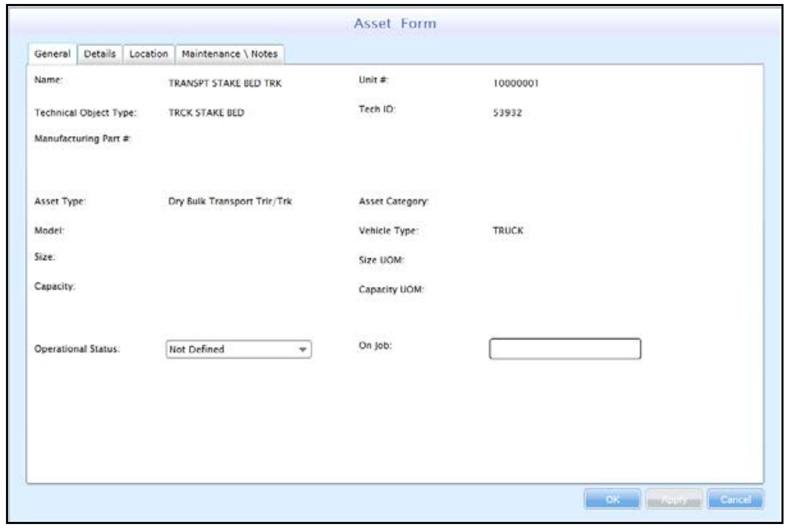
Asset Form

The **Asset Form** is used to manage the properties of equipment. The **Asset Form** is available in the **Equipment Manager** view.

To view/edit the **Asset** form:

1. In the **Equipment Manager** view, right-click the required asset from the **Equipment** list**.** From the menu, click the **Edit** option. The form for the selected asset is displayed.



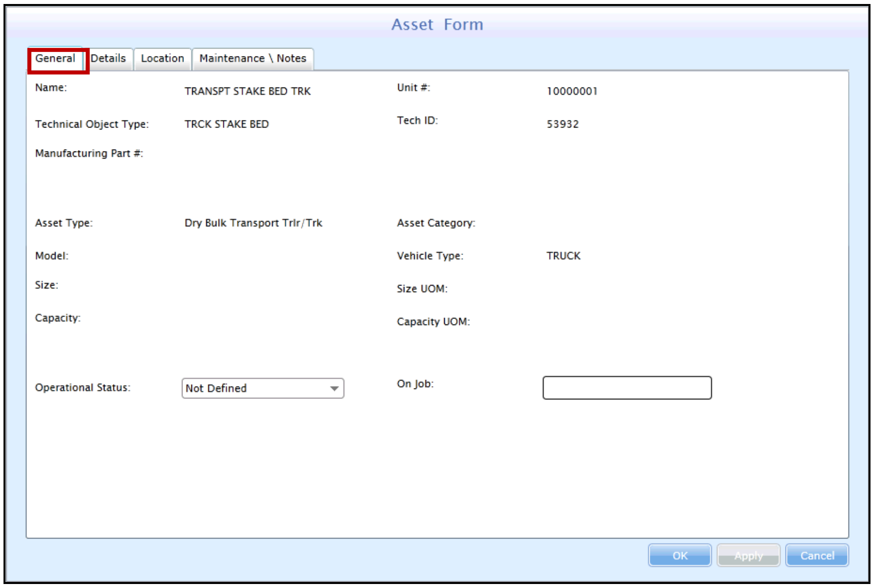


Notes:

- You can also double-click any asset to display the **Asset** form.
- Not all fields in this form are applicable for all assets.

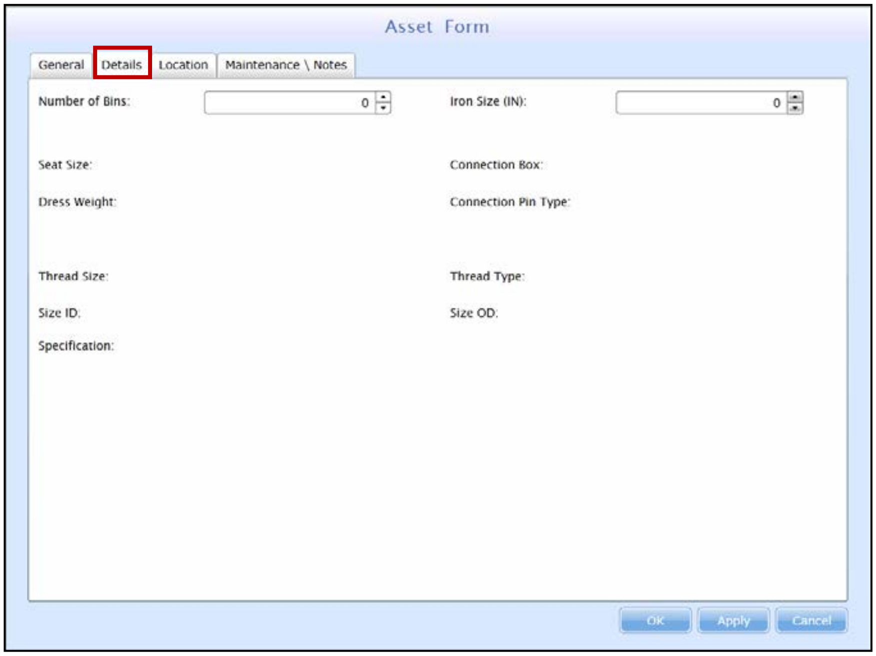
The tabs on the **Asset Form** are:

1. General Tab



- **Name**: Displays the name assigned to the equipment
- **Unit #**: Displays the SAP equipment number
- **Technical Object Type**: Displays the technical object type of equipment
- **Tech ID**: Displays the technical identifier of the equipment
- **Manufacturing Part #**: Displays the manufacturing part number of the equipment
- **Asset Type**: Displays the type of asset
- **Asset Category**: Displays the category of the asset
- **Model**: Displays the model of the equipment
- **Vehicle type**: Displays the vehicle type
- **Size**: Displays the inside diameter
- **Size UOM**: Displays the size in units of measurement
- **Capacity**: Displays equipment capacity
- **Capacity UOM**: Displays equipment capacity in units of measurement
- **Operational Status**: Displays the operational status of the equipment
- **On Job**: Displays whether or not the equipment is on a job

2. Details Tab

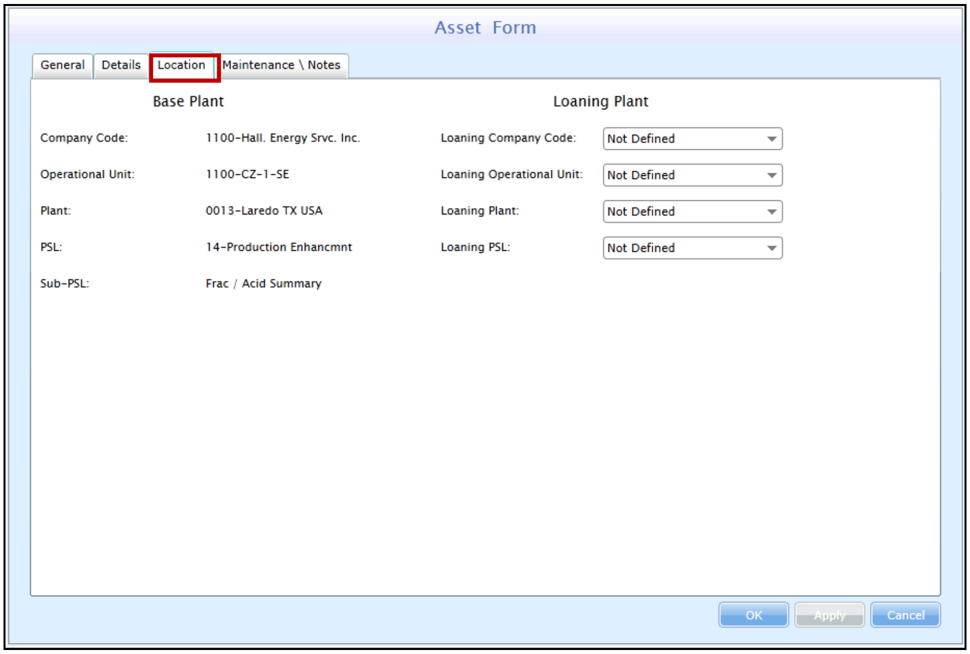


Note: All fields on the details tab of the asset form are pre-populated

- **Number of Bins**: Displays the number the bins associated with the asset, if applicable
- **Iron Size (IN)**: Displays Iron size, if applicable
- **Seat Size**: Displays the size of the seat
- **Connection Box**: Displays the connection box
- **Dress Weight**: Displays the weight the pool is dressed to receive
- **Connection Pin Type**: Displays the type of pin connection
- **Thread Size**: Displays the size of the thread
- **Thread Type**: Displays the type of thread
- **Size ID**: Displays the size identifier
- **Size OD**: Displays the outer diameter
- **Specification**: Displays the specification

▪

3. Location Tab



This tab has two sections: **Base Plant** and **Loaning Plant**

Base Plant – Displays the **Company Code**, **PSL**, **Operational Unit**, and **Plant** information for the plant that owns the equipment.

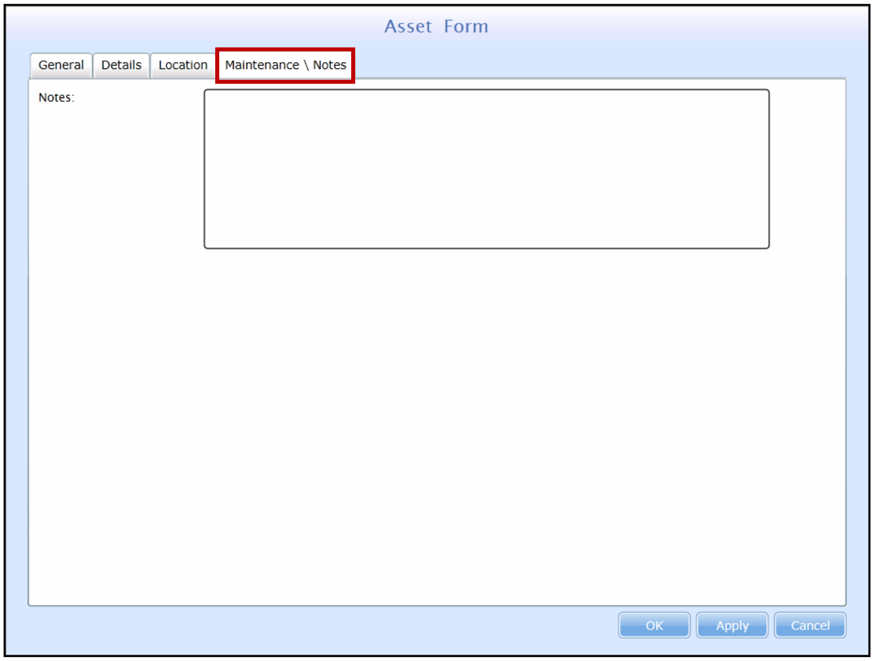
- **Company Code**: Displays the company code
- **Operational Unit**: Displays the operational unit
- **Plant**: Displays the plant
- **PSL**: Displays the Product Service Line
- **Sub – PSL**: Displays a unit within the primary Product Service Line

Loaning Plant – Displays the **Company Code**, **PSL**, **Operational Unit**, and **Plant** information for the plant that is loaning the equipment.

Note: Not all PSLs use the loaning functionality

- **Loaning Company Code**: Use to select the code of the company loaning the asset
- **Loaning Operational Unit**: Use to select the operational unit loaning the equipment
- **Loaning Plant**: Use to select plant loaning the equipment
- **Loaning PSL**: Use to select Product Service Line loaning the equipment

4. Maintenance | Notes Tab



- **Notes:** Used to enter any notes pertaining to the asset

Assigning a Job

All jobs are generated in SAP/Summit and transmitted to ClickSchedule. In ClickSchedule, the initial status of these jobs is **Unassigned**. This indicates that the jobs are not yet scheduled or forecasted. These jobs are placed in the **Job List** pending user review and action.

After these jobs are manually scheduled, their status automatically changes to **Assigned**. This status indicates that the jobs have been scheduled to a crew and/or individual for a specific time period.

> **Note**: The jobs with the status **Assigned** can still be rescheduled.

To assign a job in ClickSchedule:

1. Load the appropriate data in ClickSchedule.

   Note: For more information, refer to the **Loading Data in ClickSchedule** Step Instructions document.

2. Find the required unassigned job in the **Job List**. It may be necessary to apply a filter to the Job List.

   Note: For more information, refer to the **Defining and Applying Filters** Step Instructions document.

3. Schedule the required job.

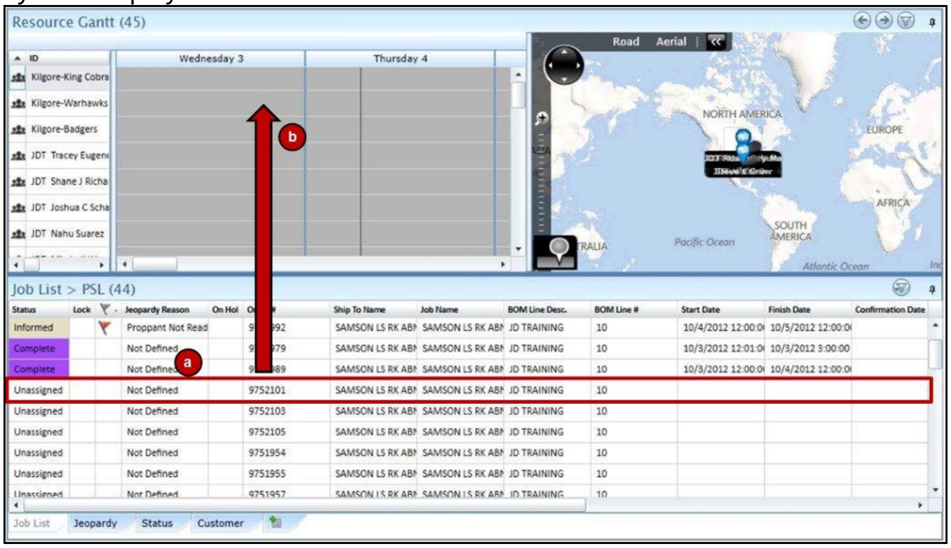
   The Scheduler assigns the job to a crew, individual, and/or equipment in ClickSchedule.

   Note: Resources should be allocated to a crew before that crew can be assigned a job.

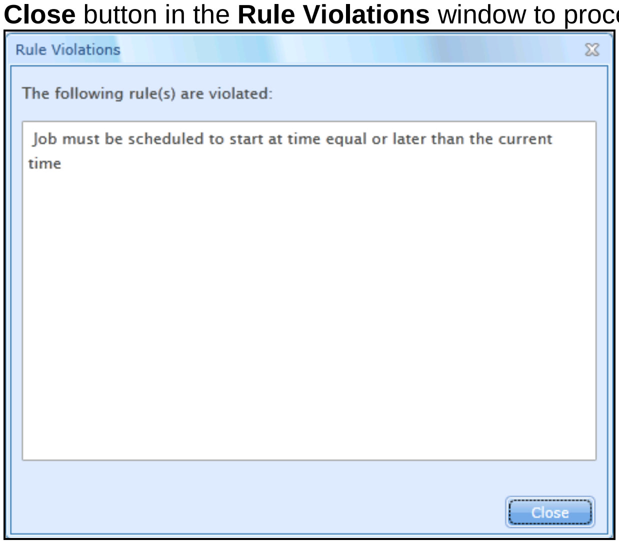
   To assign the job to a specific crew:

   a. Select/highlight the required job from the **Job List**.

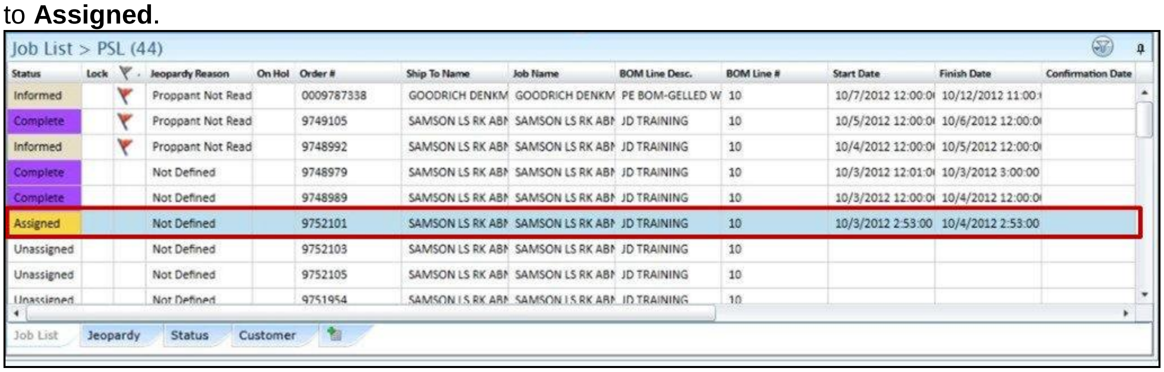
b. Drag the selected job onto the required crew, in the **Resource Gantt** chart. The system displays the **Rule Violations** window with violated rule details.



c. Review the Rule Violations and make any necessary adjustments. Then, click the **Close** button in the **Rule Violations** window to proceed.



Note: After you click the **Close** button, you will notice that the status of the job changes to **Assigned**.



To assign a job to an individual, drag the job onto the required individual and follow the same steps as explained above in steps a to c.

Creating a Continuation Job

The new Continuation Job feature is utilized in ClickSchedule for the scenarios where a Job must be stopped and continued at a later date.

This new functionality will allow the Scheduler to create a copy of the job for situations where:

- The Job is placed On Hold and the Crew is required to leave the site for another Job. Once the job is no longer On Hold, a different Crew needs to be assigned.
- A Crew cannot complete the Job and must pass the effort off to another Crew to continue the work.

Note: For situations where the Equipment & Tools will remain onsite even though the Personnel are not onsite, the resources will continue to accrue utilization during this period of time.

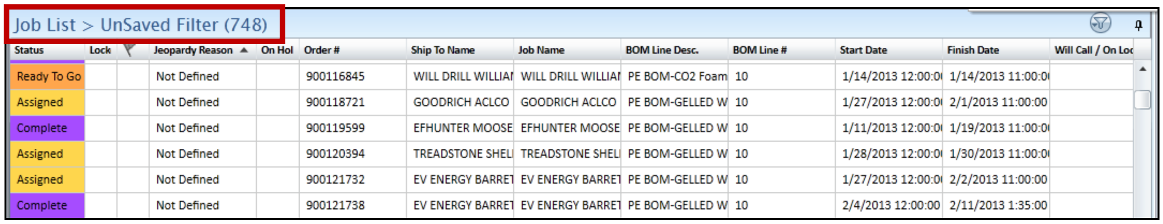
Continuation Jobs cannot be created from Jobs in the **Cancelled**, **Rejected**, **Deleted**, or **Post-Actuals** statuses and/or from multiple selected Jobs.

Use the following steps to create a **Continuation Job**:

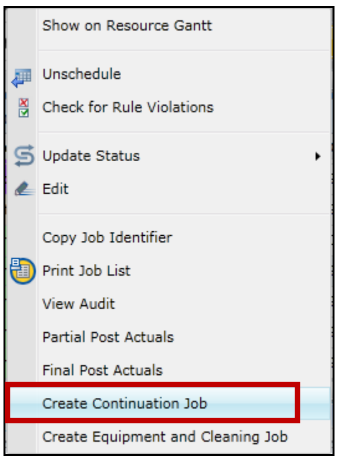
2. Load the required data in **ClickSchedule**.

   Note: Review the **Loading Data QRC** for additional information.

3. Go to the **Job List** in the **Scheduling View**.



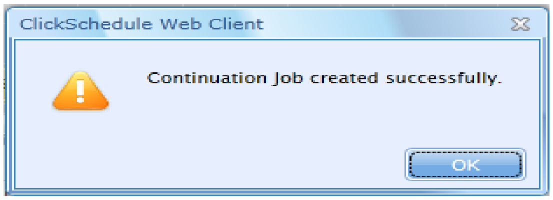
4. Right-click on the **Job** from the **Job List** and the menu list options are displayed.



Note: This functionality is also available by using the Job Builder View or the Resource Gantt Chart.

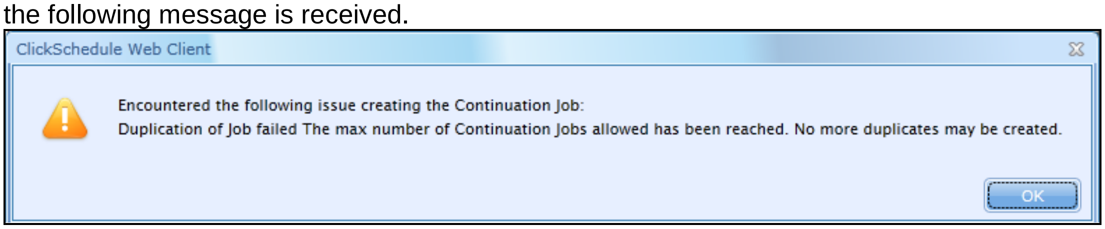
5. Select **Create Continuation Job** from the list of options.

   Note: The *ClickSchedule Web Client* window displays.

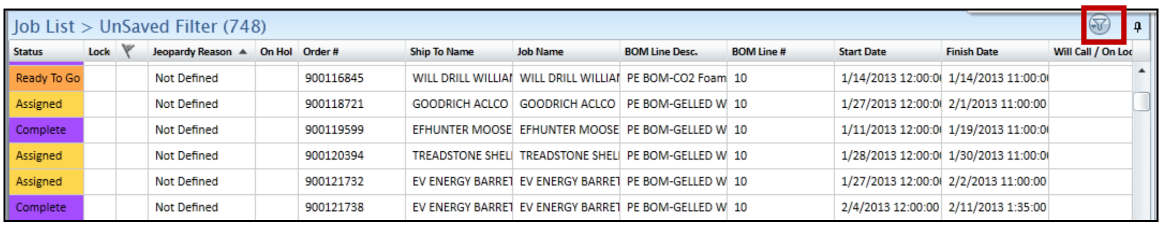


6. Click the **OK** button.

   Continuation Job Limitation: Only three (3) **Continuation Jobs** can be created, otherwise the following message is received.



7. Click the filter  button in the **Job List** to search for the new Job created.

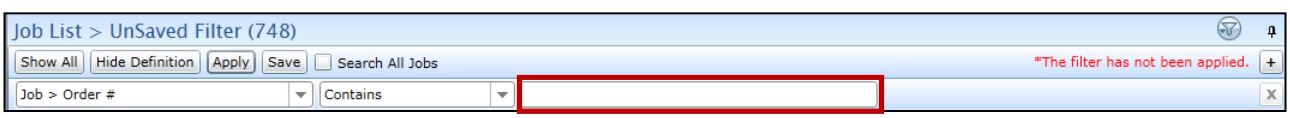


Job List > UnSaved Filter (748)

Status	Lock	Jeopardy Reason	On Hol	Order #	Ship To Name	Job Name	BOM Line Desc.	BOM Line #	Start Date	Finish Date	Will Call / On Loc
Ready To Go		Not Defined		900116845	WILL DRILL WILLIAI	WILL DRILL WILLIAI	PE BOM-CO2 Foam	10	1/14/2013 12:00:0	1/14/2013 11:00:0	
Assigned		Not Defined		900118721	GOODRICH ACLCO	GOODRICH ACLCO	PE BOM-GELLED W	10	1/27/2013 12:00:0	2/1/2013 11:00:00	
Complete		Not Defined		900119599	EFHUNTER MOOSE	EFHUNTER MOOSE	PE BOM-GELLED W	10	1/11/2013 12:00:0	1/19/2013 11:00:0	
Assigned		Not Defined		900120394	TREADSTONE SHEL	TREADSTONE SHEL	PE BOM-GELLED W	10	1/28/2013 12:00:0	1/30/2013 11:00:0	
Assigned		Not Defined		900121732	EV ENERGY BARRET	EV ENERGY BARRET	PE BOM-GELLED W	10	1/27/2013 12:00:0	2/2/2013 11:00:00	
Complete		Not Defined		900121738	EV ENERGY BARRET	EV ENERGY BARRET	PE BOM-GELLED W	10	2/4/2013 12:00:00	2/11/2013 1:35:00	

8. Select the pre-defined **Specific Job**  from the list of options.

   Note: The default parameters display.

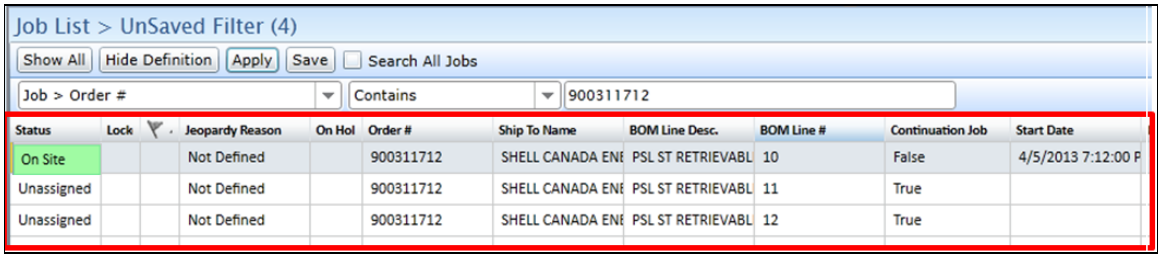


9. Enter the Job number (Sales Order number) in the blank field.

10. Click the **Apply** button, .

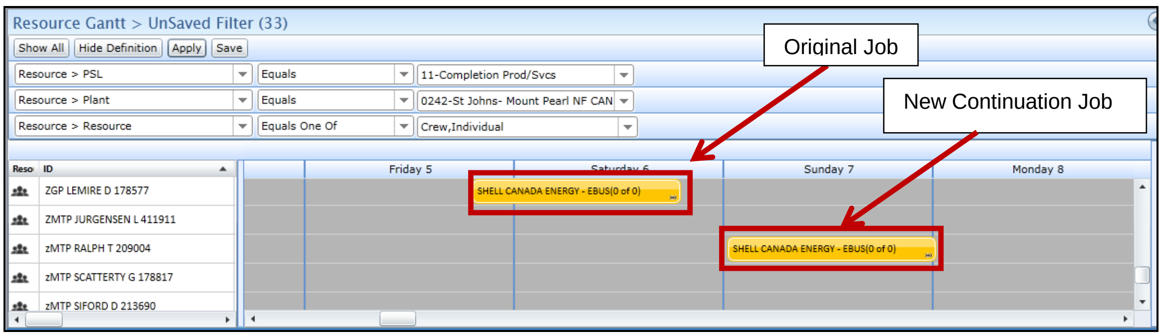
    Note:

    - Jobs that match the filter criteria are displayed in the **Job List.**
    - The Continuation Job displays with the default status of **Unassigned** status.
    - All relevant information is copied from the original **Job.**



Note: The **Continuation Job** creates a new **BOM Line #,'s** and displays "**True**" in the **Continuation** column.

Note: Status updates of the Continuation Job(s) will not be communicated to SAP. Updates to the Sales Order in SAP will be communicated to the original Job in Click.



11. From the Scheduling View, update the crew allocation on the original Job to reflect the end date on site.

    Note: For situations where schedulable equipment is left on site, changing the crew allocation will stop the system from automatically generating an HRU for this equipment on the next Job the Crew catches. The Resource Utilization will need to be generated for the equipment on the new Continuation Job.

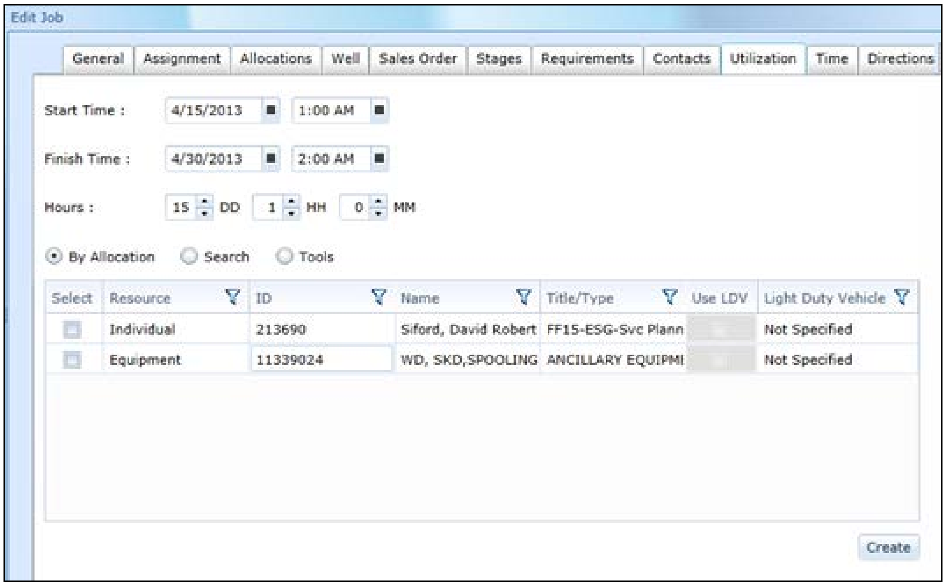
12. Proceed with allocating the new Continuation Job to the crew for the appropriate time period and crew assignment.

    Note: In cases where the Tools are left on site while the Crew heads to another Job, the Scheduler must add a new Tool(s) to the Continuation Job. Refer to the **Link Tools Tab - B&C and HCT** QRC for further instructions.

13. Update the status of the Continuation Job in Click to '**Informed**' and proceed through the Job Details statuses via the Mobile app.

14. Use the Utilization tab, Utilization in the Job Edit Form to manually create a **Resource Utilization** records for the Equipment and Tools, if required.

    Note: This will allow for the Scheduler to capture the Utilization hours. Refer to **Edit Job Form by PSL** QRC and/or the **Create Utilization Record** QRC for further instructions.



15. Once the Continuation Job is Complete, update the status of the original Job to '**Complete**'.

16. Review the Job hours and perform the **Partial and Final Post Actuals** on the original Job displayed in the **Job List**.

    Note: **Partial Post Actuals** requests will always be communicated to SAP via the original Job.

    Final Post Actual will not be communicated to SAP until all Continuation Jobs and the original Job are in '**Complete'** status.

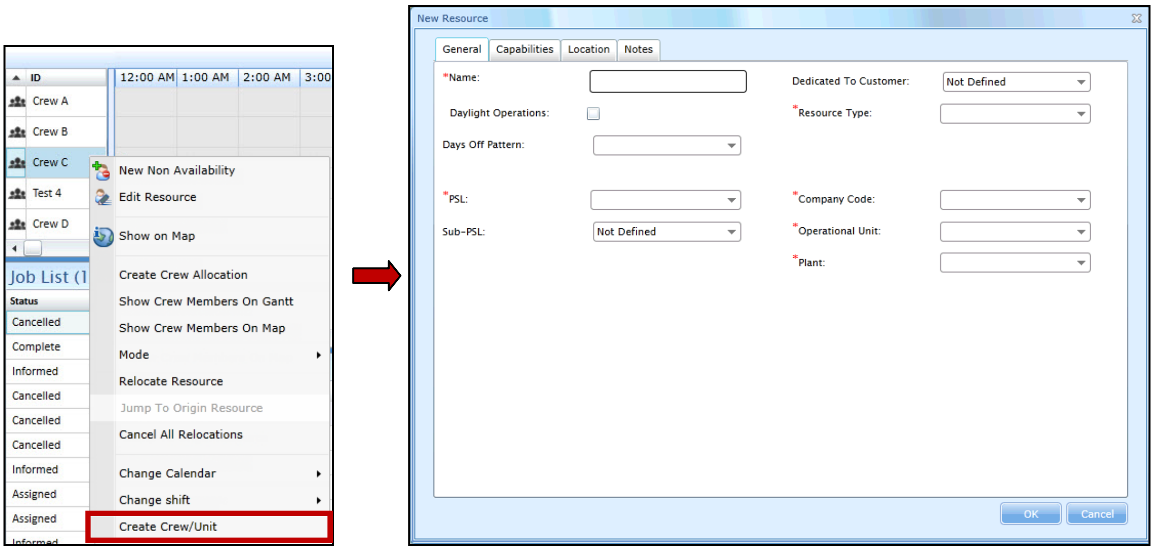
    Refer to the **Partial Post Actuals & Final Post Actuals** QRC for further instructions.

Creating Crew/Unit

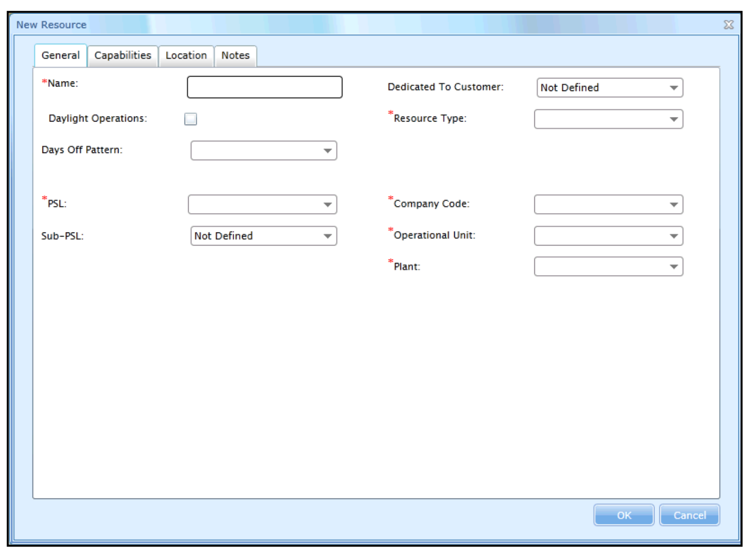
The Schedulers are responsible to create a crew or unit. To create a crew:

5. In the **Scheduling** view, right-click anywhere on the **Resources List** in the **Resource Gantt** chart. A list of options displays.

6. Select the **Create Crew/Unit** option. The **New Resource** form displays.



7. On the **General** tab, complete the following fields:

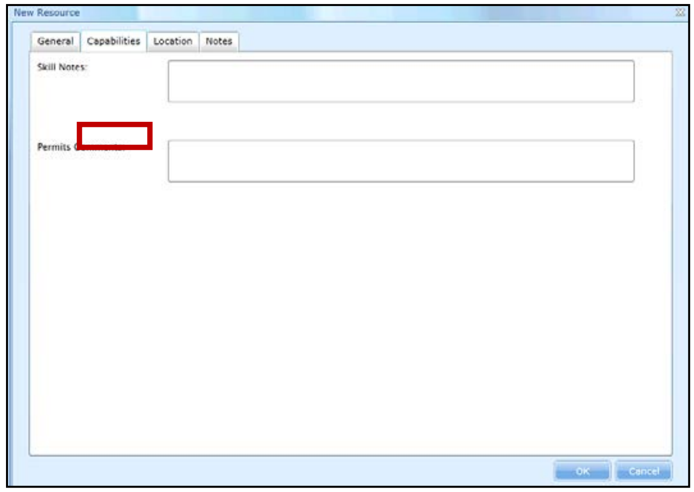


- **Name**: Enter the name of the crew
- **Daylight Operations**: Select this checkbox if the crew needs to work during daylight hours
- **Days Off Pattern**: Set the working pattern of the crew using this drop-down list
- ***PSL**: Select the Product Service Line (PSL) of the crew from this drop-down list
- **Sub-PSL**: Select the sub-PSL of the crew from this drop-down list
- **Dedicated to Customer**: If this crew is dedicated to a customer, select the customer from this drop-down list
- ***Resource Type**: Select the **Crew** option from this drop-down list
- ***Company Code**: Select the required company code of the crew from this drop-down list

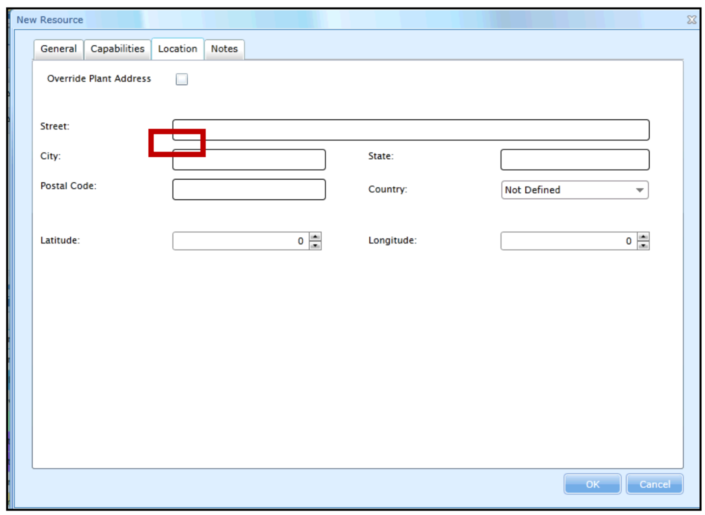
- *Operational Unit: Select the name of the area of the crew from this drop-down list
- *Plant: Select the name of Plant of the crew from this drop-down list

Note: All the fields marked with an asterisk (*) are required fields.

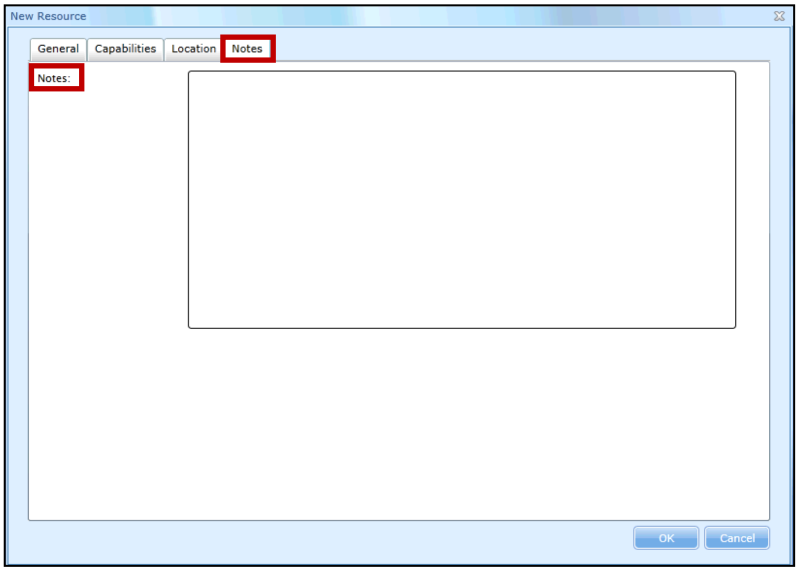
8. On the **Capabilities** tab, complete the following fields:
   - **Skill Notes**: Enter any notes related to the specific crew skills
   - **Permit Comments**: Enter information related to the crew's permits



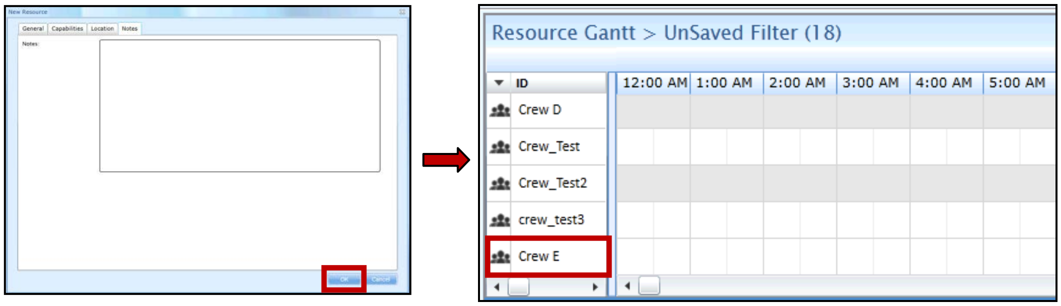
9. On the **Location** tab, complete the following fields:
   - **Override Plant Address**: Select this checkbox to override the current Plant address of the crew
   - **Street**: Enter the street address of the crew's location in this field
   - **City**: Enter the city for the crew in this field
   - **State**: Enter the state for the crew in this field
   - **Postal Code**: Enter the postcode of the area for the crew in this field
   - **Country:** Select the country for the crew from this drop-down list
   - **Latitude**: Enter the crew's latitude information in this field
   - **Longitude**: Enter the crew's longitude information in this field



10. On the **Notes** tab, enter any notes related to the crew in the **Notes** field.



11. Click **OK.** The crew is created and appears under the **Resources List** in the **Resource Gantt** chart.



Create Utilization Records

There are scenarios where Halliburton Resource Utilization Records (HRUs) are not automatically generated or created by the Mobile Lead Users (MLU). The need for the user to create **HRU**s in ClickSchedule is necessary to properly complete jobs when encountering the following scenarios:

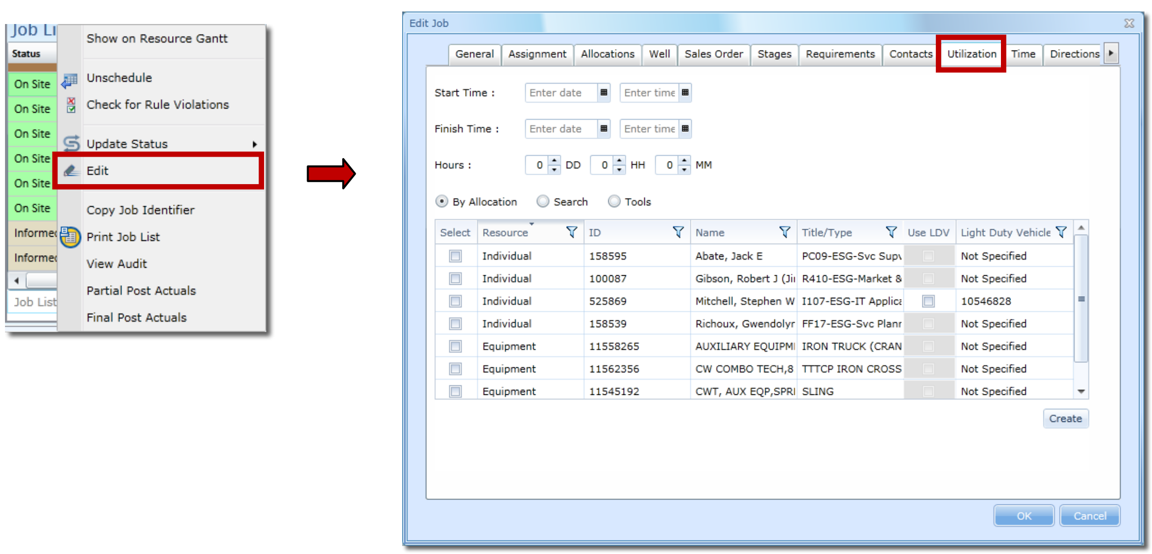
a. Individuals or equipment were not allocated to the crew performing the job, and/or the MLU was not able to enter hours for the Individual.

b. The Job Details device was not working or provisioned.

c. The Scheduler is required to enter the **Resource Utilization** hours manually.

Creating **HRU** records:

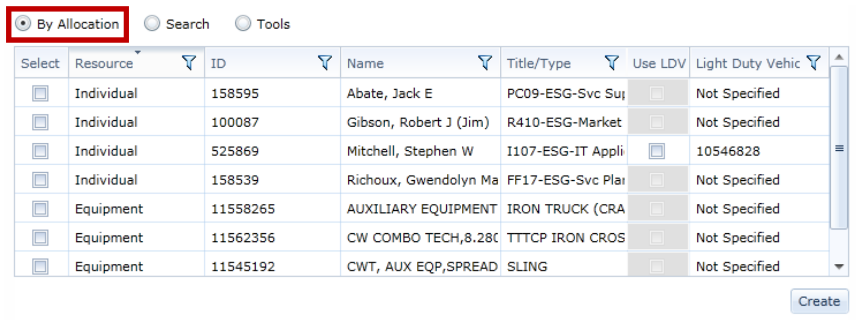
1. The job status will be set to **On-Site** or **Complete**.
2. From the **Job** list, **Gantt** or **Job Builder**, right-click or double-click to open the applicable **Job** in **Form** view. Then select the **Utilization** tab.



- **Start Time**: Controls the start time of the **HRU** and is usually the time the resource left the gate/yard/hotel.
- **Finish Time**: Controls the finish time of the **HRU** and is usually the time the resource returned to the gate/yard/hotel or left to start another job.
- **Hours**: Specifies the exposure hours. Usually, the hours the resource was on-site.

Mode Selection: Three radio buttons allow you to select between **Search** mode, **Allocation** mode, and **Tools** mode (Only B&C and HCT). By default, **Allocation** mode is selected.

Allocations: In **Allocation** mode, a table displays resources allocated to the crew during the job, and allows you to select the resources, for which the **HRU**s should be created. The table displays the following information:



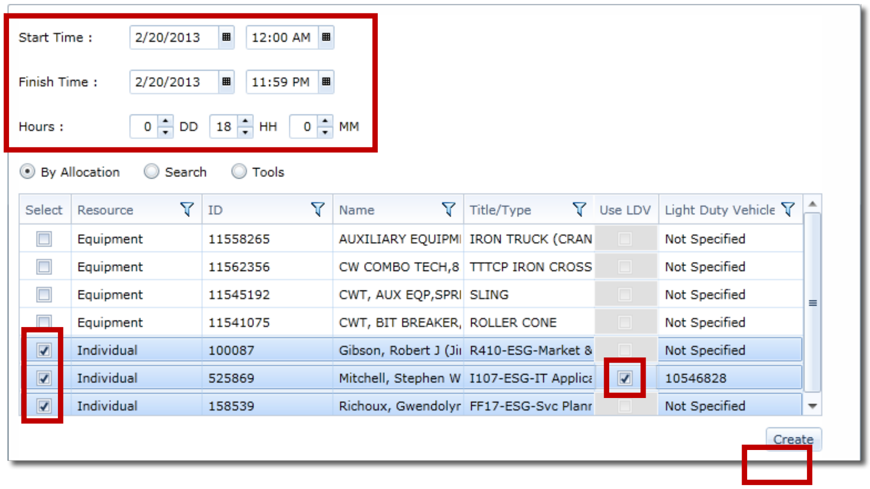
Select	Resource	ID	Name	Title/Type	Use LDV	Light Duty Vehic
	Individual	158595	Abate, Jack E	PC09-ESG-Svc Su|		Not Specified
	Individual	100087	Gibson, Robert J (Jim)	R410-ESG-Market		Not Specified
	Individual	525869	Mitchell, Stephen W	I107-ESG-IT Appli		10546828
	Individual	158539	Richoux, Gwendolyn Ma	FF17-ESG-Svc Plai		Not Specified
	Equipment	11558265	AUXILIARY EQUIPMENT	IRON TRUCK (CRA		Not Specified
	Equipment	11562356	CW COMBO TECH,8.28(	TTTCP IRON CROS		Not Specified
	Equipment	11545192	CWT, AUX EQP,SPREAD	SLING		Not Specified

- **Select**: a checkbox column allowing the user to enable the **Resource** record for **HRU** creation
- **Resource**: the type of resource, either **Individual** or **Equipment**
- **ID**: the SAP **Personnel Number** or **Equipment ID** of the resource
- **Name**: the name of the resource
- **Title/Type**: the title of the **Individual** or the type of **Equipment**
- **Use LDV**: a checkbox column allowing you to specify that a matching **HRU** should be created for the Light Duty Vehicle specified
- **Light Duty Vehicle ID**: the SAP ID of the light-duty vehicle configured for the resource. The value 'Not Specified' is displayed in the event; an **LDV** is not bound to the resource.

Note: The table columns may be ordered ascending, descending; column widths expanded or contracted, and filtered using standard Windows functionality.

To Create **HRU** records in **Allocation** mode:

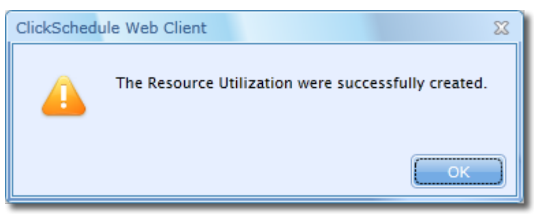
1. When the **Utilization** tab is selected on the **Job** form, all resources who allocated to the **Crew** during the time of the assigned job will be listed in the table.
2. Select one or more **Resources** in the table for which you want to create **HRU** records.
3. Additionally, you may check the '**Use LDV**' checkbox for the resources, which should have a matching **LDV** record created. The **LDV** checkbox is disabled if an **LDV** was not configured for a resource.



4. Using the **Date** and **Time** controls, enter the resource **Start** and **Finish Time**.
    a. **Start Time** must be greater than or equal to the job start time.
    b. **Finish** Time must be less than or equal to the job finish time.
    c. **Start Time** must precede the **Finish Time**.

5. Enter the resource **Exposure** time in days, hours and minutes
    a. Hours cannot be greater than the timespan between **Start Time** and **Finish Time**.
    b. Hours must be greater than zero.

6. Click the **Create** button. A message is displayed indicating the **HRU** records were successfully created.



Note: Create records will not be visible in the Scheduling View . You must go to Resource Utilization View and open the job.

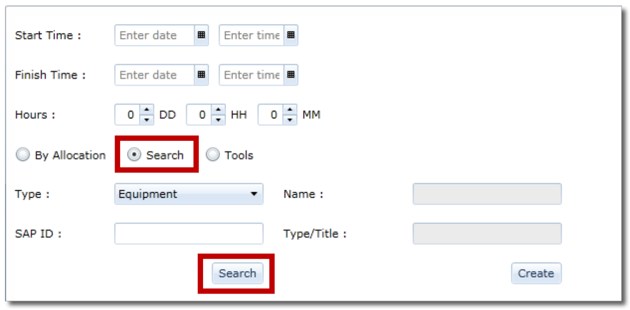
Search: In **Search** mode, you are able to specify which type of resource you would like to create an **HRU** record for, there are two options:

a. **Individual**: any human resource

b. **Equipment**: both schedulable equipment and tools

To create **HRU** records in **Search** mode:

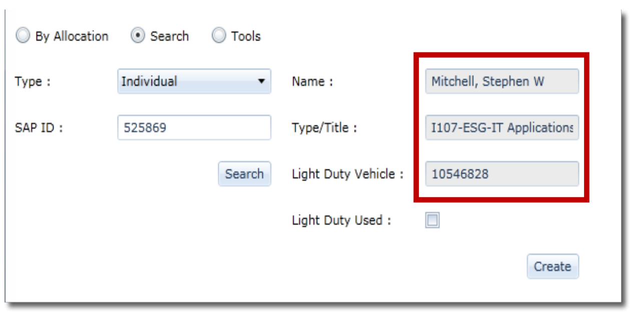
1. Select the **Search** option.



2. In the **Type** drop-down, select the **Resource** type.

3. Enter an **Equipment ID** or **Personnel** number in the **SAP ID** field.

4. Click **Search**.



5. If the resource is found, the **Name** and **Title/Type** text boxes are populated with the applicable information. You may validate that the proper resource was located or change the SAP ID and search again.

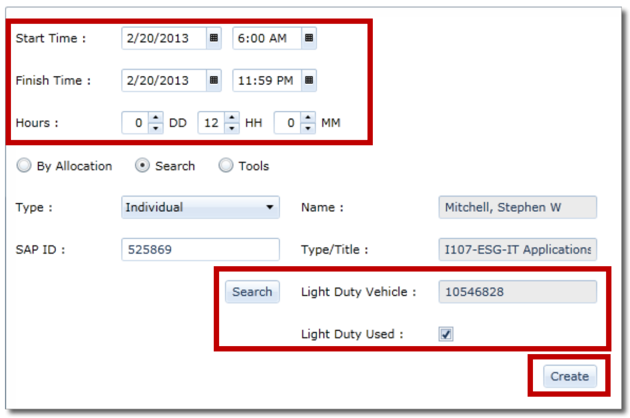
   Note: If the resource is not found in the system, the following message is displayed: 'No Resource with SAP ID {ID Number} exists in the system'.

6. When the correct resource is located, and it is an Individual, you may also create a matching **HRU** record for the light-duty vehicle if a **LDV** was configured for the resource. Otherwise, the checkbox is disabled.

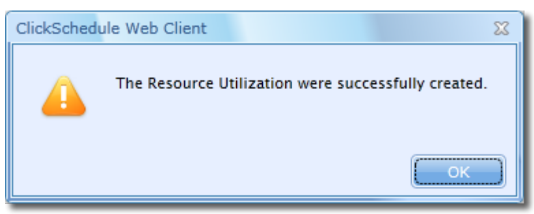
   Note: You cannot specify a different **LDV** here; however, you can search specifically for a **LDV** as '**Equipment**' and create the **HRU** directly.

7. Using the **Date** and **Time** controls, enter the resource **Start** and **Finish Time**.
   a. **Start Time** must be greater than or equal to the job start time.
   b. **Finish Time** must be less than or equal to the job finish time.
   c. **Start Time** must precede the **Finish Time**.

8. Enter the resource **Exposure** time in days, hours and minutes.
   a. Hours cannot be greater than the timespan between **Start Time** and **Finish Time**.
   b. Hours must be greater than zero.



9. Click the **Create** button. A message is displayed indicating the **HRU** records were successfully created.

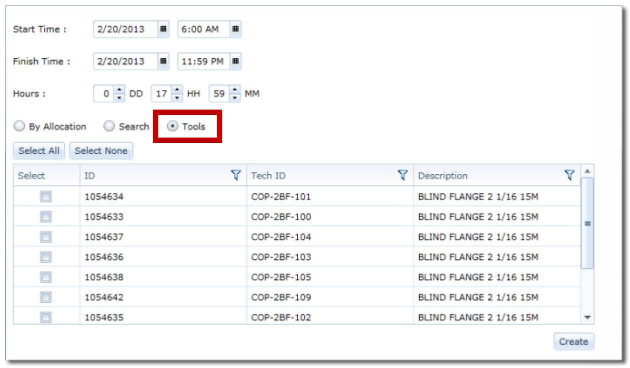


Note: Create records will not be visible in the Scheduling View. You must go to Resource Utilization View and open the job.

Tools (Only B&C and HCT): In **Tools** mode, a table will list all **Tools** associated with the job on the **Tools** tab of the **Job** form. You may select one or more **Tools** in the table for which you want **HRUs** created.

To create **HRU** records in **Tools** mode:

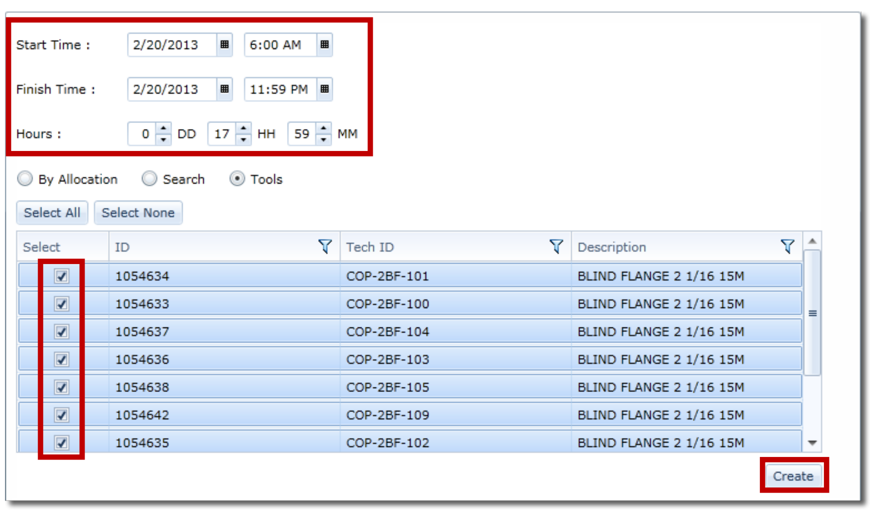
1. Select the **Tools** option.



- **Select**: a checkbox column allowing the user to enable the **Resource** record for **HRU** creation.
- **ID**: the SAP **Personnel Number** or **Equipment ID** of the resource
- **Tech ID**: the Technical Object Type ID of the **Equipment**
- **Description**: the name of the **Equipment**

Note: The table columns may be ordered ascending or descending; column widths expanded or contracted, and filtered using standard Windows functionality.

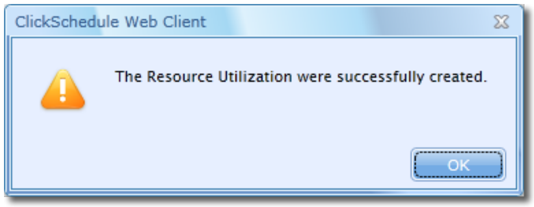
2. Select one or more **Tools** in the table for which you want to create **HRU** records.



3. Using the **Date** and **Time** controls, enter the **Tools Start** and **Finish Time**.
   a. **Start Time** must be greater than or equal to the job start time.
   b. **Finish Time** must be less than or equal to the job finish time.
   c. **Start Time** must precede the **Finish Time**.

4. Enter the resource **Exposure** time in days, hours and minutes.
    a. Hours cannot be greater than the timespan between **Start Time** and **Finish Time**.
    b. Hours must be greater than zero.

5. Click the **Create** button. A message is displayed indicating the **HRU** records were successfully created.



Note: Create records will not be visible in the Scheduling View. You must go to Resource Utilization View and open the job.

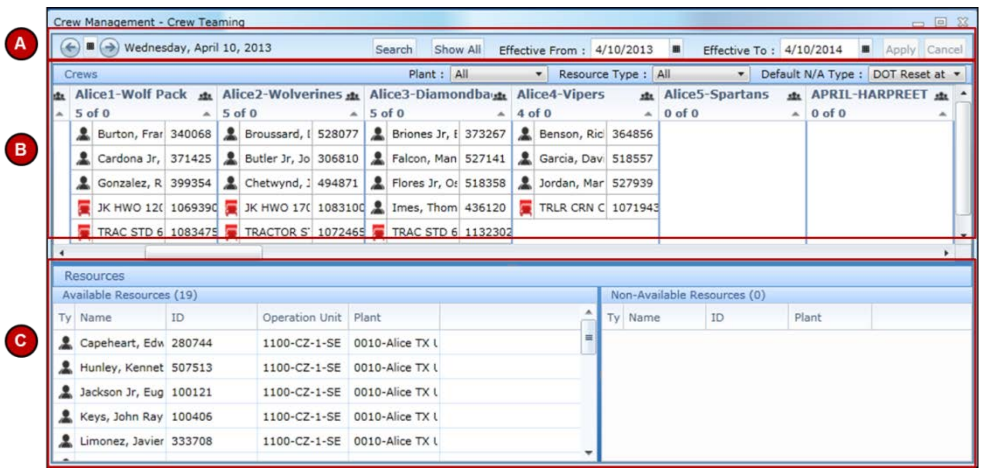
Crew Teaming – Production Enhancements

Crew Teaming is a feature utilized in Click to create and maintain crew assignments. This functionality will allow for the Scheduler to allocate resources to different crews for a specific time period. Allocations can be made up to four years from the effective date.

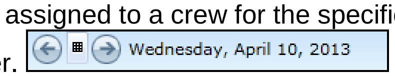
Schedulers will be able to:

- View and modify the makeup of a crew
- View and update resources allocated or not allocated to a crew
- Manipulate the column grids and sort the resources in a crew by alpha numeric

The *Crew Management – Crew Teaming window* is separated into three panels: **Menu Bar**, **Crews** and **Resources**.



A. **Menu Bar:** Displays functional buttons and effective dates.

B. **Crews Panel**: Displays all resources assigned to a crew for the specific calendar date as shown in the upper left corner. 

C. **Resources Panel**: Displays all available and non-available resources for the specific calendar date as shown in the upper left corner.

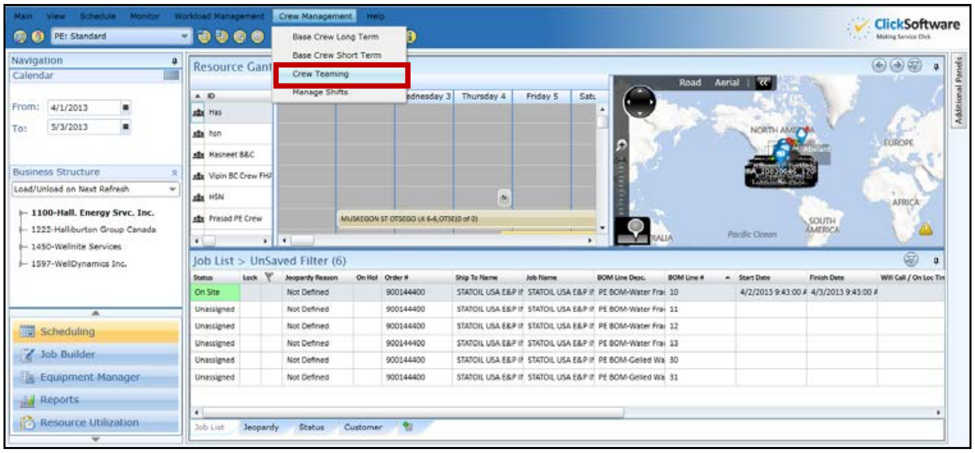
Note: The *Crew Management – Crew Teaming* window is based on the loaded filters in the Scheduling View.

The Show All button in the *Crew Management – Crew Teaming* window clears all filters and displays all resources.

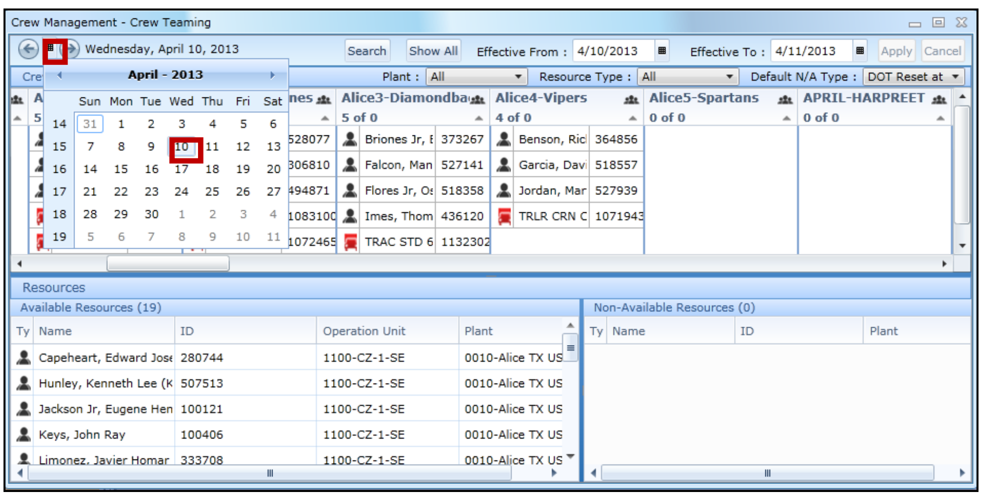
Use the following steps to create and maintain Crew Teaming.

17. Load the required data in ClickSchedule.

    Note: Review the **Loading Data QRC** for additional information.

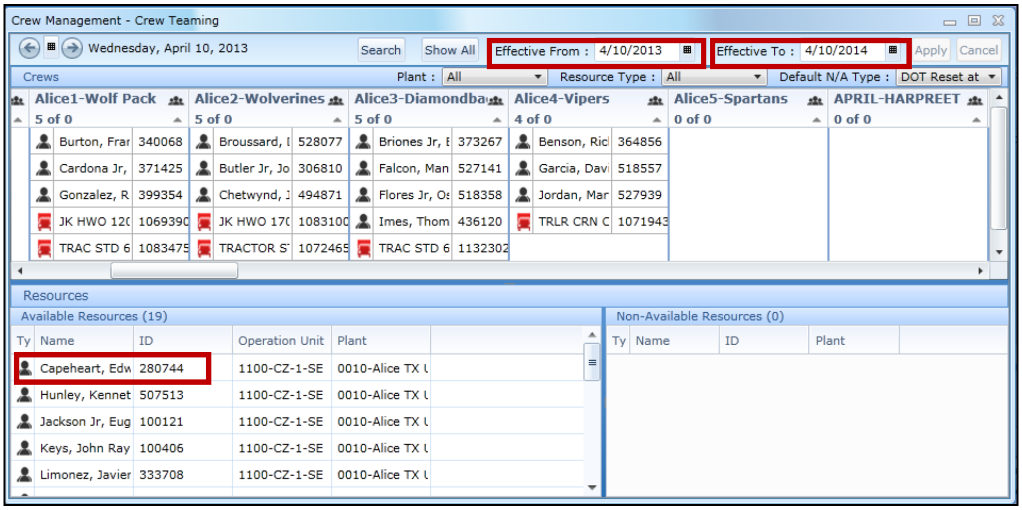


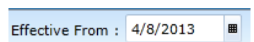
18. From the menu bar, click **Crew Management** and select **Crew Teaming** from the list of options.



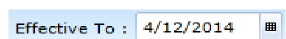
19. To display allocated resources for specific date, click the **Calendar** button.

20. Select the appropriate date.

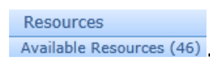


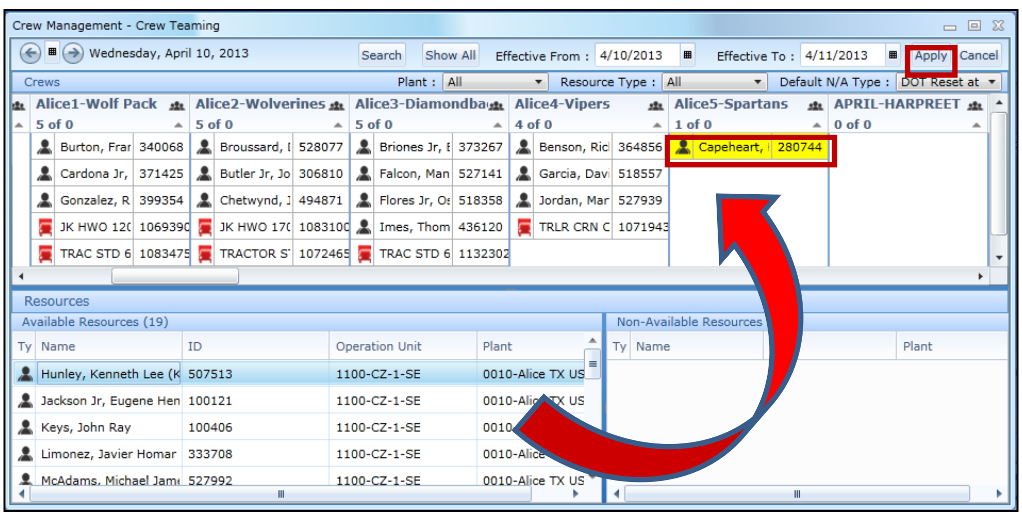
21. Click in the **Effective From** field to update the start date, .

Note: The **Effective From** field defaults to today's date.

22. Click in the **Effective To** field to update the end date, .

Note: The **Effective To** field defaults to one year from today's date.

23. Select the resource in the **Available Resources** panel, .

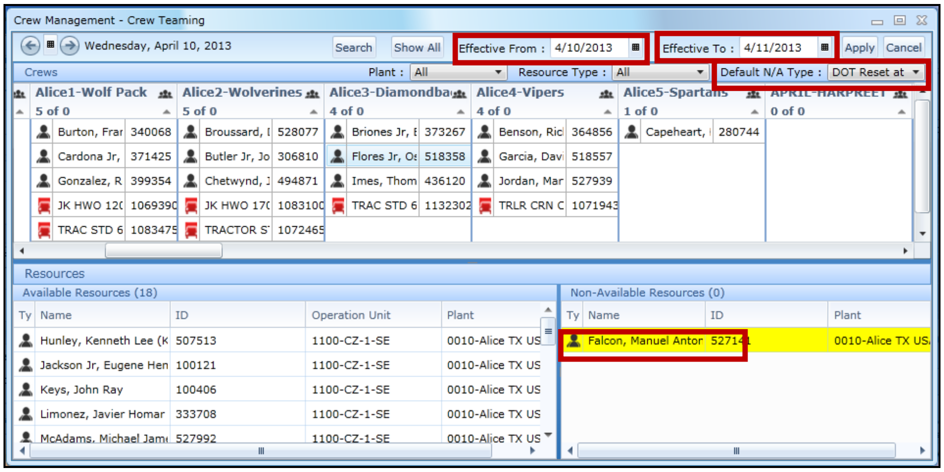


24. Use the drag and drop feature to add the resource to the appropriate crew.

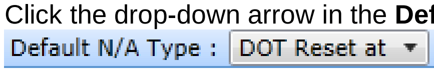
Note: The resource is highlighted in yellow until changes are applied.

25. Click the **Apply**  button.

Note: Resources can be dragged and dropped from Crews to the **Available Resources** section as well. Drag the resource from other sections to the **Available Resources** section and ensure that the **Effective From and To** dates are set prior to moving resources.

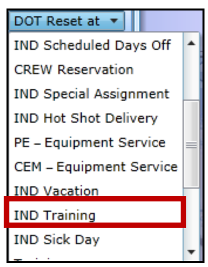


26. To set a resource as **not available,** validate the non-availability date displays in the **Effective From** and **Effective To** fields.

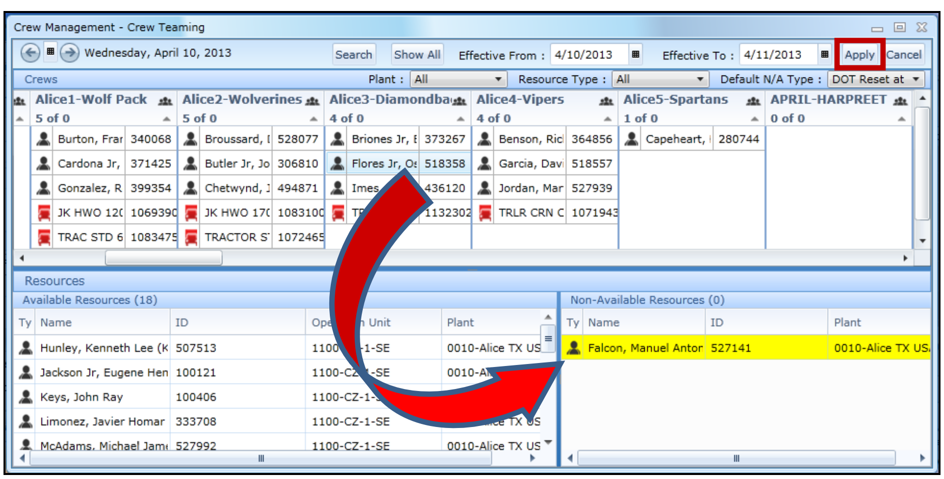
27. Click the drop-down arrow in the **Default N/A Type** field, 

, to select the appropriate reason code for the resource.

28. Select the appropriate reason code from the list of options.



29. Select the resource from either the **Crew Panel** or the **Available Resources** panels.



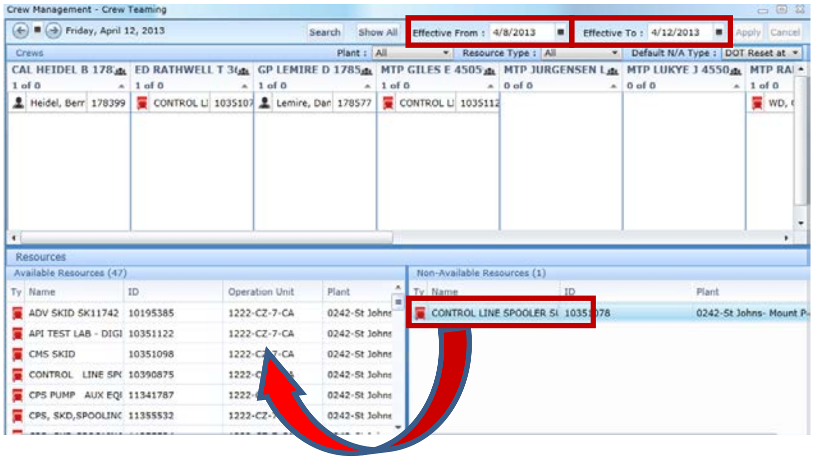
30. Use the drag and drop feature to move the resource to the **Non-Available Resources** section.

31. Click the **Apply** 

button.

    Note: The resource is now unavailable for the time specified and the reason specified.

32. To set a non-available resource as **available,** validate the appropriate availability date displays in the **Effective From** and **Effective To** fields.



33. Use the drag and drop feature to move the resource to the **Available Resources** section.

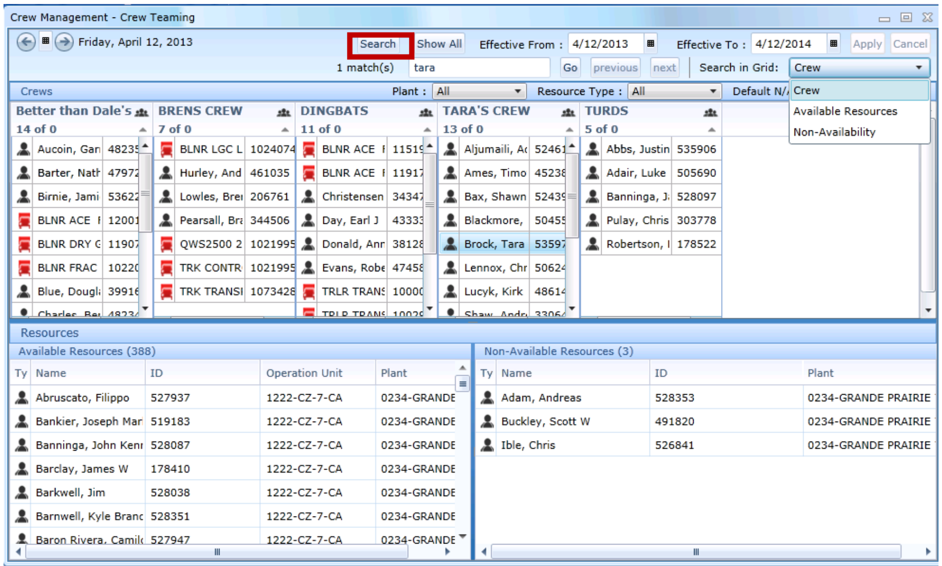
34. Click the **Apply** 

button.

    Note: The resource is now available to be assigned to a Crew.

Additional Features

Searching in Crew Teaming:



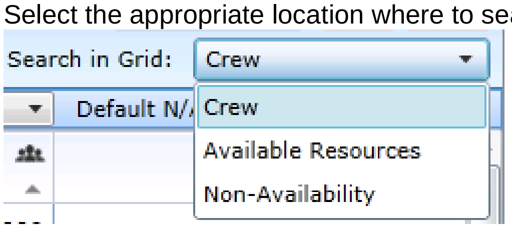
To search for resources:

12. Click the **Search** button.

13. Enter the text in the blank field.

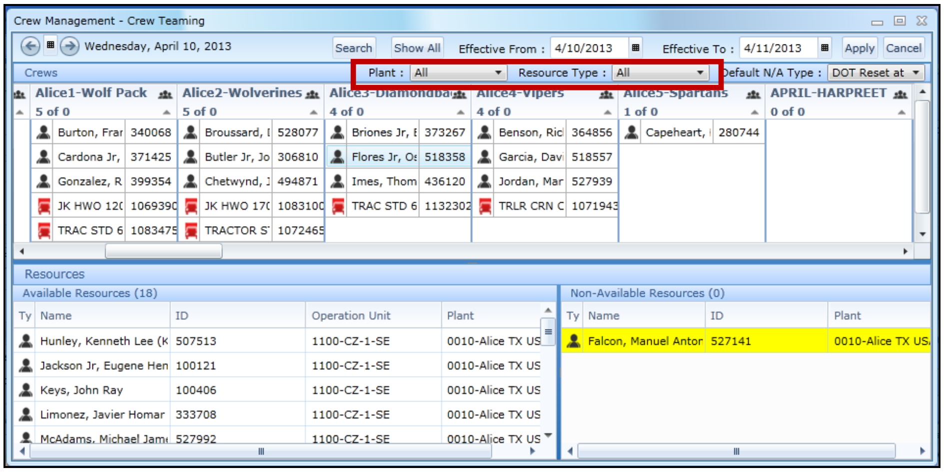
14. Click the drop-down in the **Search in Grid** field.

15. Select the appropriate location where to search for the resource.

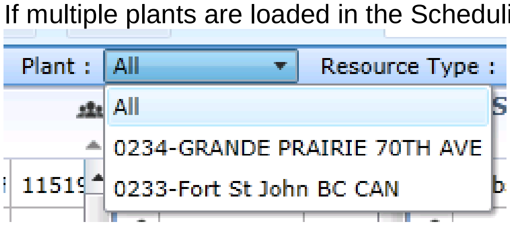


Note: The Resource will be highlighted if found. Check for results next to search box to see if resource was found.

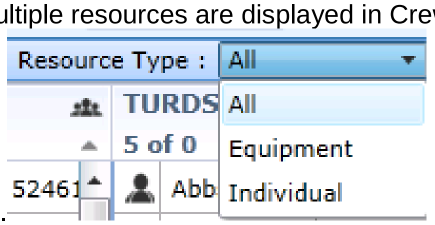
Filtering in Crew Teaming:



If multiple plants are loaded in the Scheduling View, you can filter by plant.



If multiple resources are displayed in Crew Teaming, you can filter by resource type.



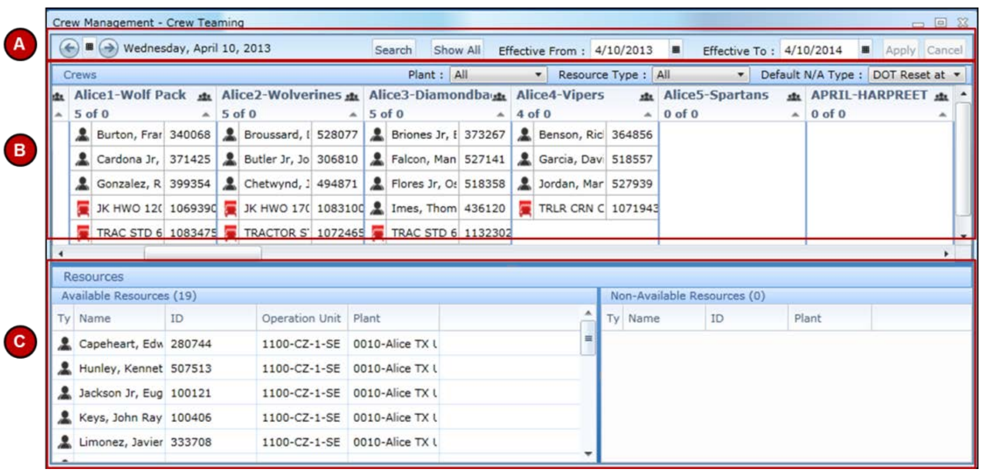
Crew Management -Crew Teaming

Use the Crew Teaming to create and maintain crew assignments. This functionality will allow for the Scheduler to allocate resources to different crews for a specific time period. Allocations can be made up to four years from the effective date.

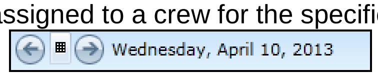
Schedulers will be able to:

- View and modify the makeup of a crew
- Manipulate the column grids and sort the resources in a crew by alpha numeric

The *Crew Management – Crew Teaming window* is separated into three panels: **Menu Bar**, **Crews** and **Resources**.



D. **Menu Bar:** Displays functional buttons and effective dates.

E. **Crews Panel**: Displays all resources assigned to a crew for the specific calendar date as shown in the upper left corner. 

F. **Resources Panel**: Displays all available and non-available resources for the specific calendar date as shown in the upper left corner.

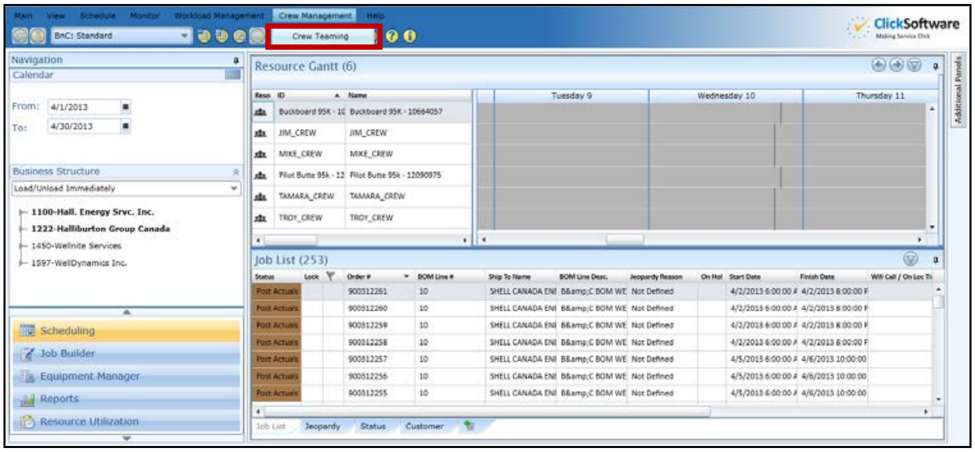
Note: The *Crew Management – Crew Teaming* window is based on the loaded filters in the Scheduling View.

The Show All button in the *Crew Management – Crew Teaming* window clears all filters and displays all resources.

Create and Maintain Crew Teaming:

1. Load the required data in **ClickSchedule**. This effects what information is initially loaded into the Crew Teaming view.

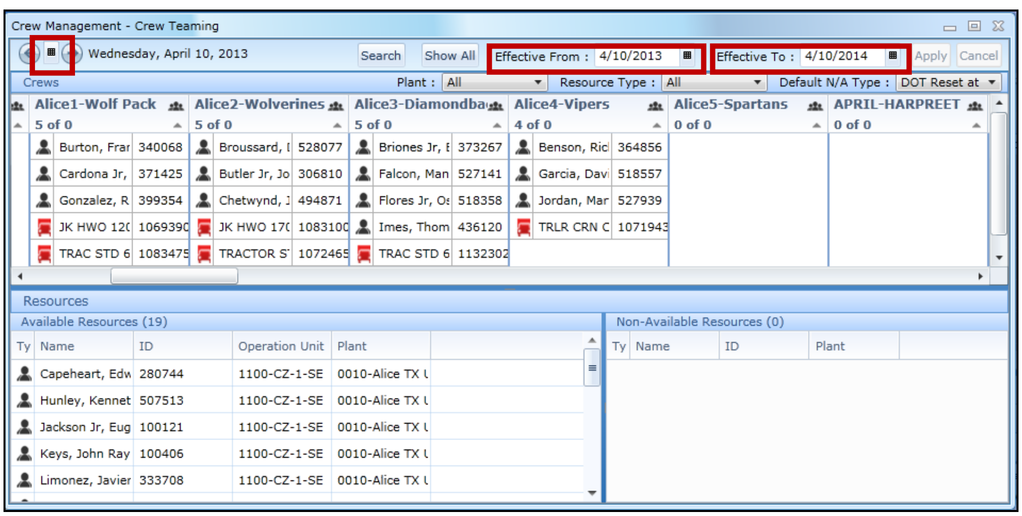
   Note: Refer to the QRC titled **Loading Data** for additional information.

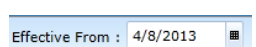


2. From the Menu Bar, click **Crew Management** and select **Crew Teaming**.

3. To display allocated resources for specific date, click the **Calendar** button.

4. Select the appropriate date.



5. Enter the start date in the **Effective From** field, 

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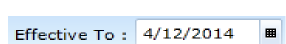
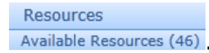
   Note: The **Effective From** field defaults to today's date.

6. Enter the end date in the **Effective To** field, 

. .

   Note: The **Effective To** field defaults to one year from today's date.

7. Select the resource from the **Available Resource** panel, 

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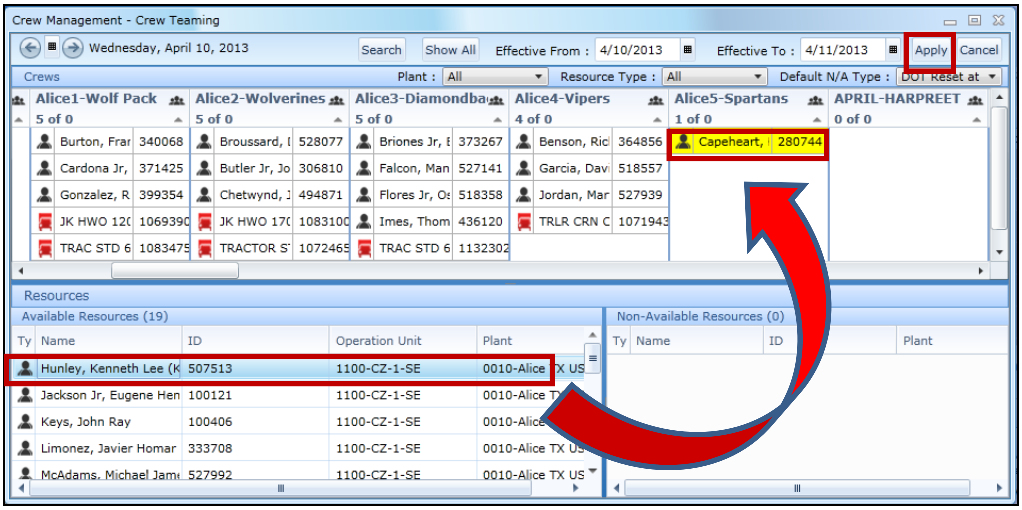


8. Use the drag and drop feature to add the resource to the appropriate crew.

   Note: The resource is highlighted in yellow until the change is applied.

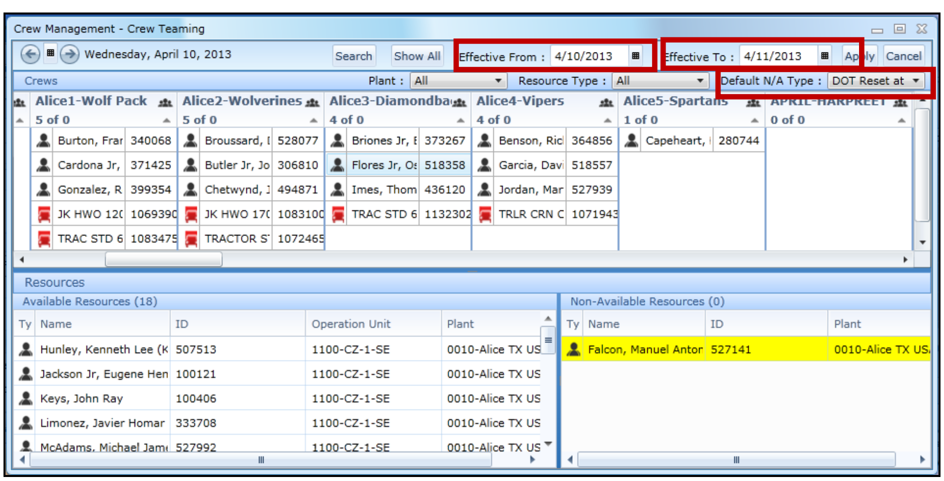
9. Click the **Apply** 

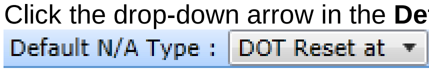
button.

   Note: Resources can be dragged and dropped from Crews to the **Available Resources** section as well. Drag the resource from other sections to the **Available Resources** section and ensure that the **Effective From and To** dates are set prior to moving resources.

Create and Change a Resource Non-Availability:

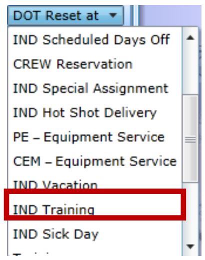
1. To set a resource as **not available,** validate the appropriate non-availability date displays in the **Effective From** and **Effective To** fields.



2. Click the drop-down arrow in the **Default N/A Type** field, 

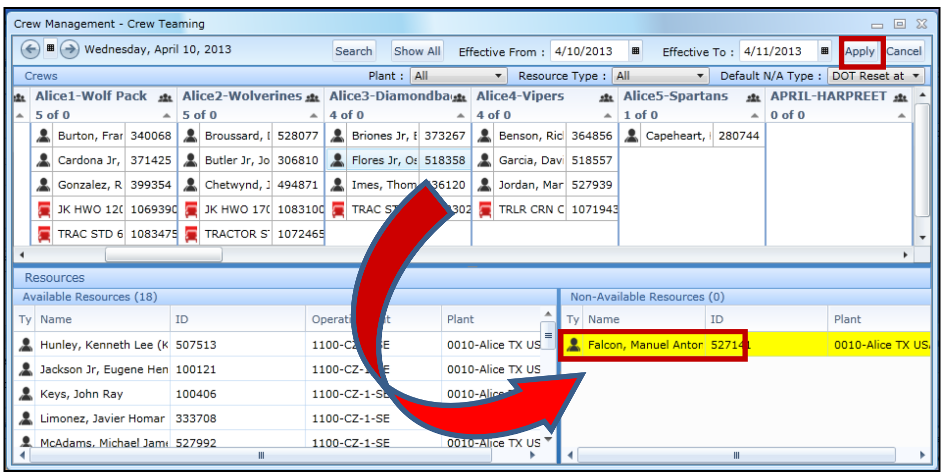
, to select the appropriate reason code for the resource.

3. Select the appropriate non-availability from the list of options.



Note: The **Default N/A Type Reason Type** is defined.

4. Select the resource from either the **Crew Panel** or the **Available Resources** panels.

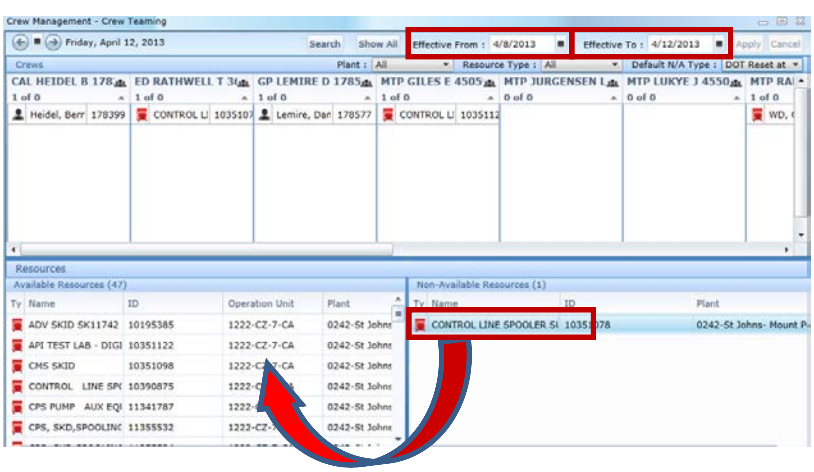


5. Use the drag and drop feature to move the resource to the **Non-Available Resources** section.

6. Click the **Apply**  button.

Note: The resource is now unavailable for the time specified and the reason specified.

7. To set a non-available resource as **available,** validate the appropriate availability date displays in the **Effective From** and **Effective To** fields.



8. Use the drag and drop feature to move the resource to the **Available Resources** section.

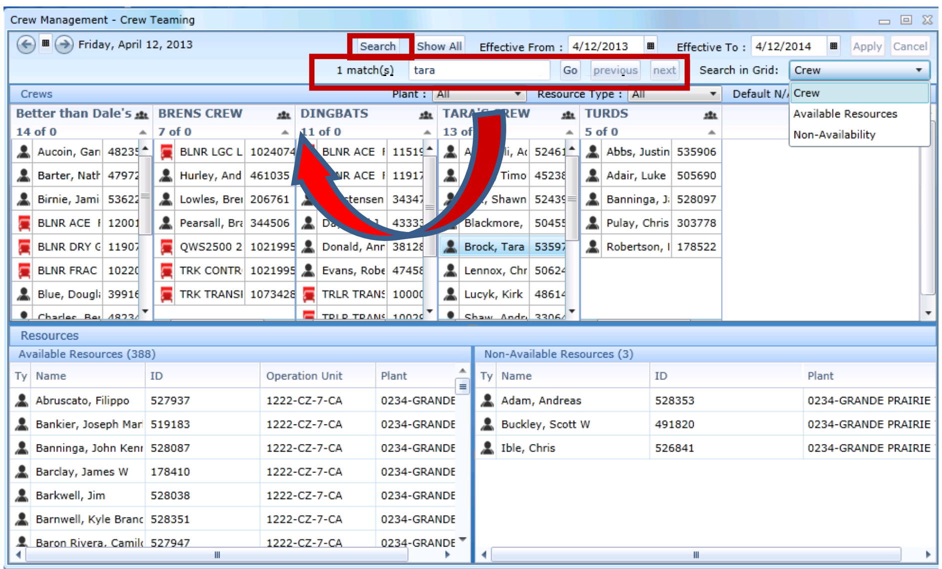
9. Click the **Apply** 

button.

   Note: The resource is now available to be assigned to a Crew.

Additional Features

Searching in Crew Teaming:



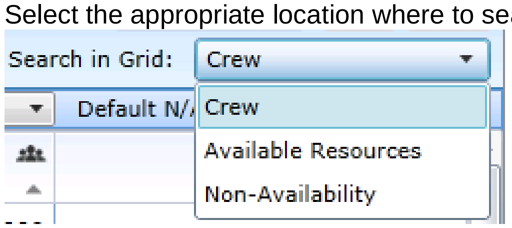
To search for resources:

1. Click the **Search** button.

2. Enter the text in the blank field.

3. Click the drop-down in the **Search in Grid** field.

4. Select the appropriate location where to search for the resource.



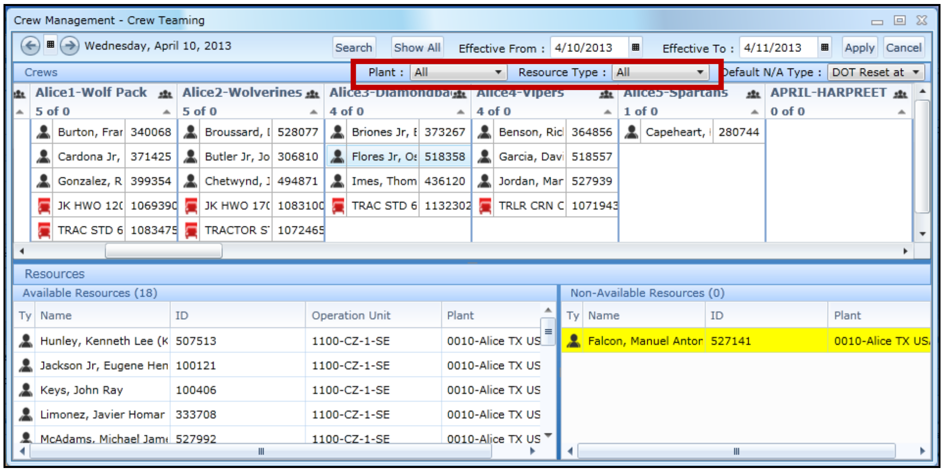
- Click the **Go** button, 

.

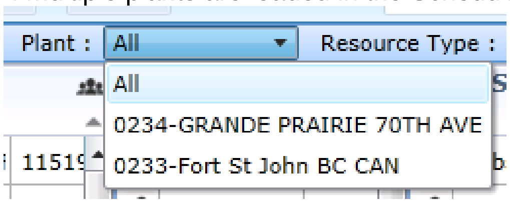
  Note: The Resource will be highlighted if found. Check for results next to search box to see if resource was found.

  Use the **Previous** or **Next** button to move through the selections that meets the search criteria.

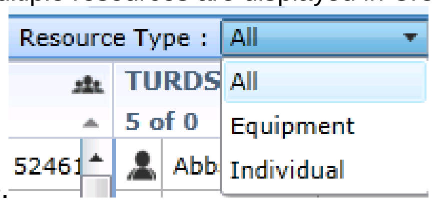
Filtering in Crew Teaming:



If multiple plants are loaded in the Scheduling View, you can filter by plant.



If multiple resources are displayed in Crew Teaming, you can filter by resource type.



Edit Job Form – B&C

The **Edit Job** form holds all the relevant properties for a job. Information concerning the job may be edited from the **Job** list in the **Scheduling** view, an **Assigned** job on the **Resource Gantt**, or the **Job Builder** view.

NOTES:

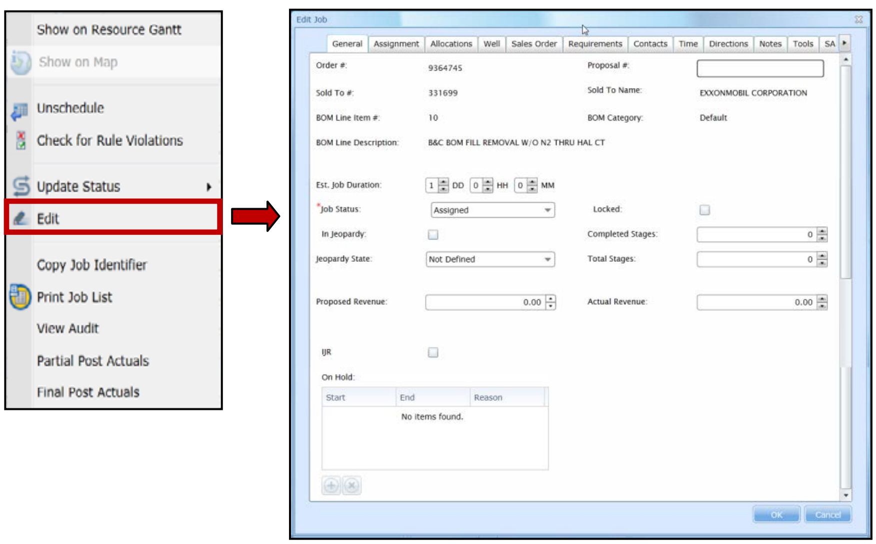
1. The **Assignment** tab only appears on the form when the job has been scheduled and in the **Scheduling** view.
2. Your PSL may not use all of the fields that are currently displayed in this document.

To view/edit the **Edit Job** form:

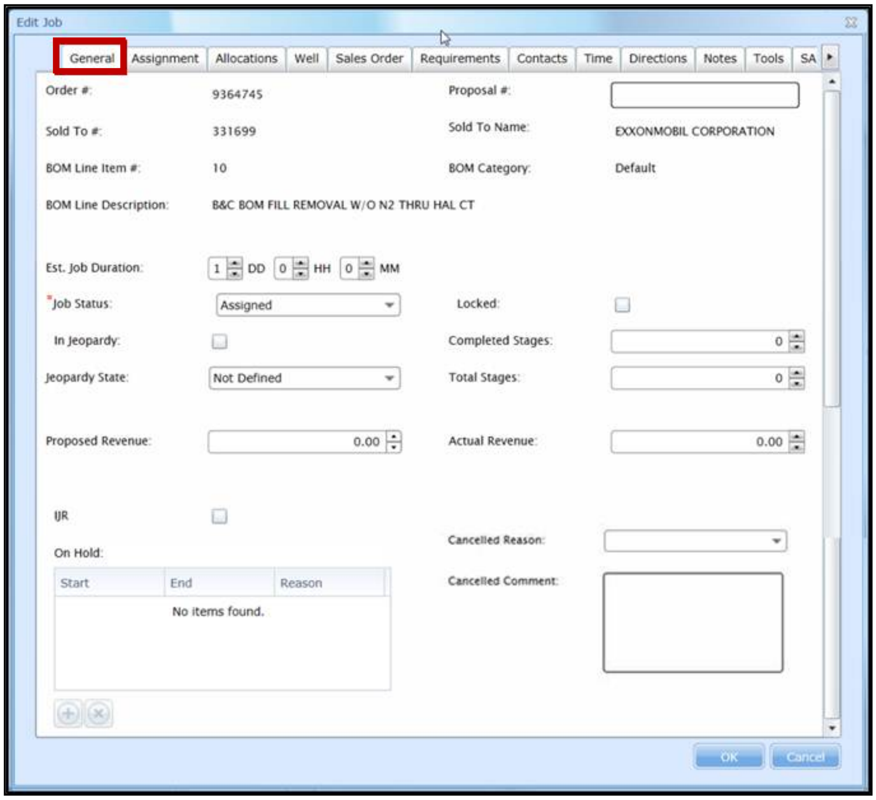
3. Right-click on the required job (from Job List/Gantt/Job Builder view). A list of options displays.

4. Select the **Edit** option. The **Edit Job** form displays

NOTE: You can also double-click any job to display the **Edit Job** form.



1. **General Tab**



- **Order #**: Displays sales order number of the job
- **Proposal #**: Used to enter the proposal number
- **Sold To #**: Displays the customer number associated with the job
- **Sold to Name**: Displays the customer name associated with the job
- **BOM Line Item #**: Displays Bill of Materials line item number for the job
- **BOM Category**: Displays the grouping of services and materials that will be provided for a job
- **BOM Line Description**: Displays the short Bill of Materials line description for the job
- **Est. Job Duration**: By default, this field is set at a day, but can be manually changed. This field is populated with the estimated duration of the job, gate-to-gate
- **Job Status**: Displays the current status of the job

  NOTE: In most cases, after the after the Scheduler updates the status to **Informed**, subsequent statuses of the job are generally updated from **Job Details** (the ClickSchedule mobile application). However, if necessary, the job status can also be updated in the **Edit Job** form.

- **Locked**: Check this box if the job needs to be locked. It prevents the job from being assigned to another crew. This makes the **Locked Comment** field visible. When checked,  is visible in the Locked column of Job List.

- **Locked Comment:** Used to enter the reason in this text field for locking the job. This is a required field if the **Locked** checkbox is selected.

- **In Jeopardy**: Check this box if the job is **In Jeopardy**. When checked, this turns on the **In Jeopardy** indicator .

- **Jeopardy State:** Used to select the jeopardy reason from the dropdown

  NOTE: The **Jeopardy** checkbox and **In Jeopardy** reason may be auto-set due to business rules/policies that have not been met.

- **Completed Stages**: May be used to enter the current stage value for the job

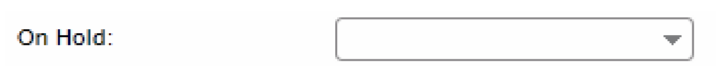
- **Total Stages**: Used to enter the total required stages of a job

- **Proposed Revenue**: Used to enter proposed revenue. It is populated from the net value of the order, but can be manually changed

- **Actual Revenue**: Used to enter actual job revenue

- **IJR**: The **Irregular Job Report** checkbox is meant to be checked when an IJR has been created for this job and indicates that the job had unanticipated complications or problems.

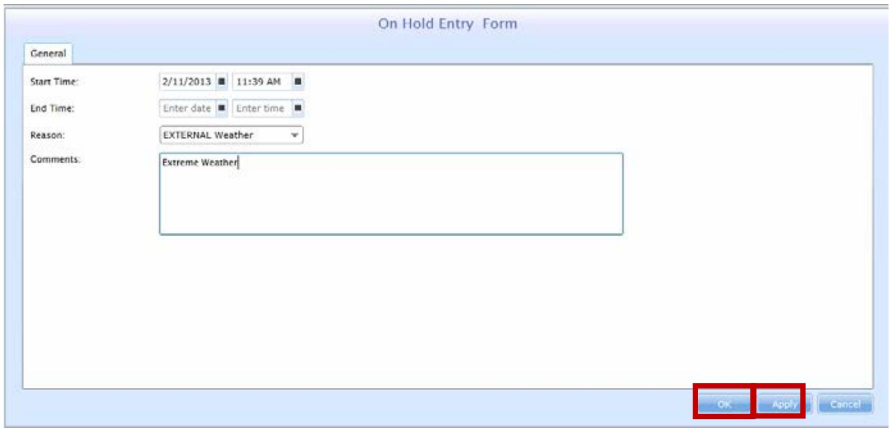
- **On Hold:** Use the drop down menu to select yes/no to indicate if the job is On Hold.



- The three columns that display on the **On Hold** table are:
  - **Start**: Select the time when the hold period starts.
  - **End**: Select the time when the hold period ends.
  - **Reason**: Select the **On Hold** reason for the job.

Click  to add a new row to the **Hold Time** table. Click  to delete a selected **Hold Time** record

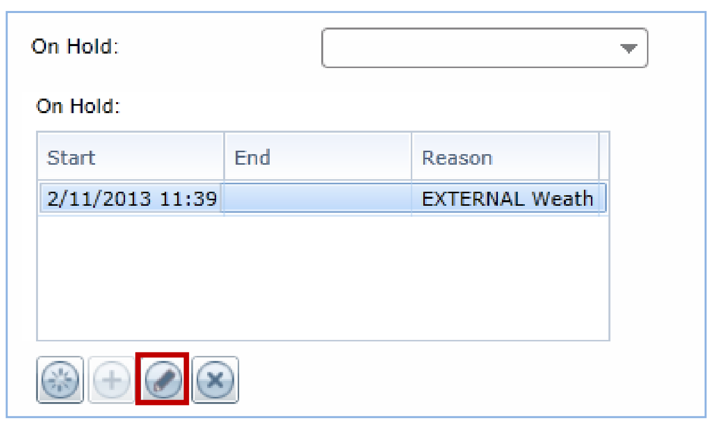
NOTE: To create a new **On Hold** record you need to be in the **Job Builder View**, but you can delete **On Hold** records from **Job Builder** and **Scheduling** view table.



- **Start Time:** Used to select the date and time when the hold period starts
- **End Time:** Used to select the date and time when the hold period ends
- **Reason**: Used to select the **On Hold** reason for the job
- **Comments**: Free text field to describe the **On Hold** reason details

Note: Click on Apply button and then the OK button. The entry appears in the **On Hold** table.

Note: The On Hold appears on the line item for the Sales Order and on the **Job List** and on the **Resource Gantt**.



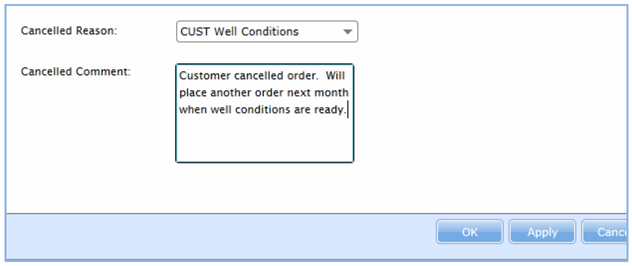
Note: To complete the **On Hold** table, click the line item to be completed, click , enter the **End Time** fields, click Apply button, click OK button. The table is now updated and the Job is no longer **On Hold.**

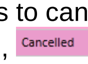
Note: Click to delete a selected **Hold Time** record.

NOTE: All cancelled fields are only visible when you cancel a job.

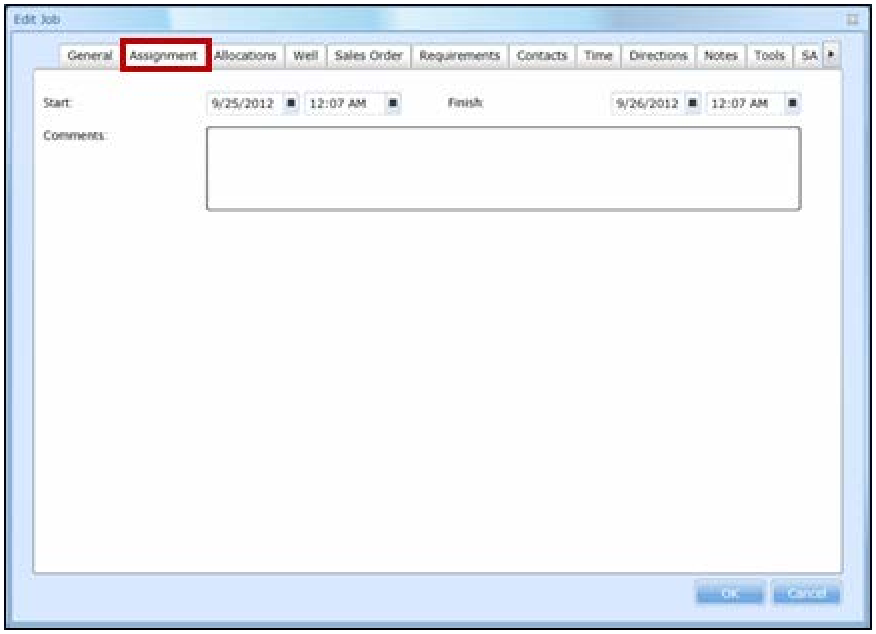
- **Cancelled Reason**: Used to select the reason for cancelling the job. This is a required field if the **Cancelled** checkbox is selected.

- **Cancelled Comment**: Free form text used to provide additional information for the job cancellation



Note: Click Apply and a pop-up message appear. Click Yes to cancel the job. Click OK and the job status will change to Cancelled,  in the **Job Builder** view and on the Job List in the **Scheduling** view.

2. Assignment Tab



NOTE: Assignment tab is only visible in the **Scheduling View** once the job has been **Assigned**

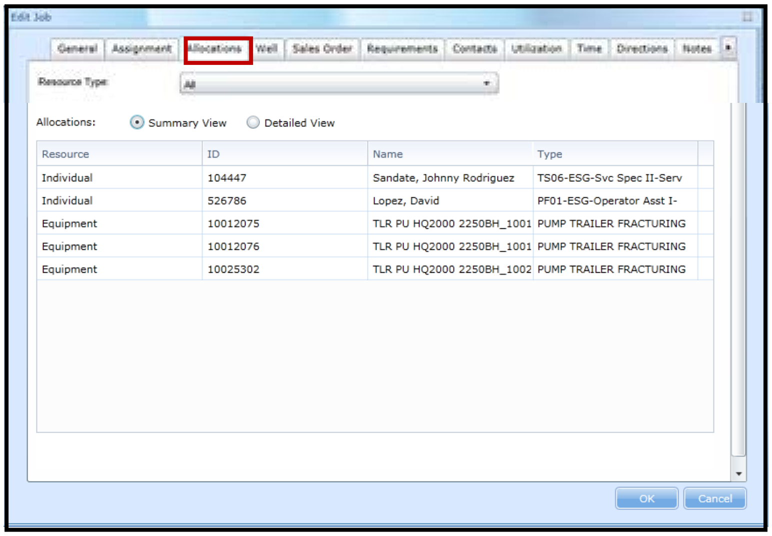
- **Start**: Displays the intended start date and time of the job (gate to gate). Populates when the job is dragged to the Gantt, but the field may be edited

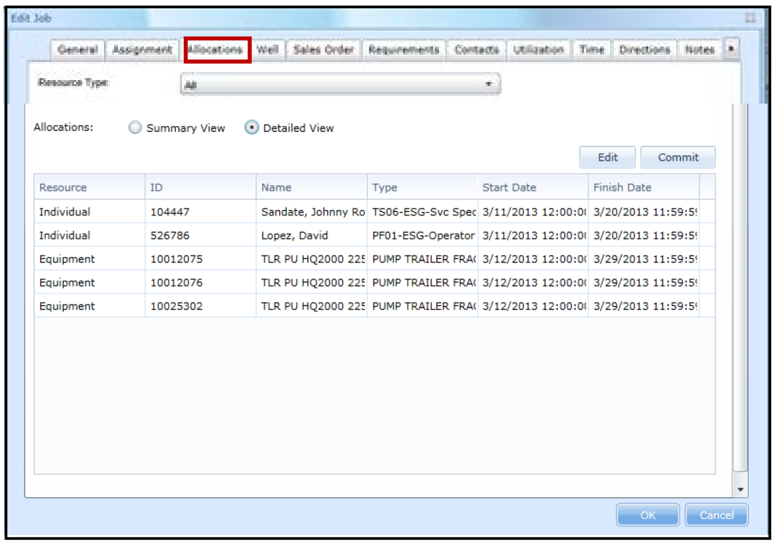
- **Finish**: Displays the intended finish date and time of the job. Populates when the job is dragged to the Gantt, but the field may be edited

  NOTE: The **Start Date** and **Time** is set when the job is dragged on to the **Resource Gantt** chart. After that, the start time can be edited. The finish date is adjusted in the mobile.

- **Comments**: Used to enter any comments related to the job

3. Allocations Tab





- **Resource Type**: Used to select the type of resource allocated to the job. The resources are then displayed in the **Allocations** table.

- **Allocations**: Displays the list of resources allocated to the job according to the selected value in the **Resource Type** drop-down.

  - **Summary View** : Summary list of allocations

  - **Detailed View**: Detailed list of allocations and allocation times

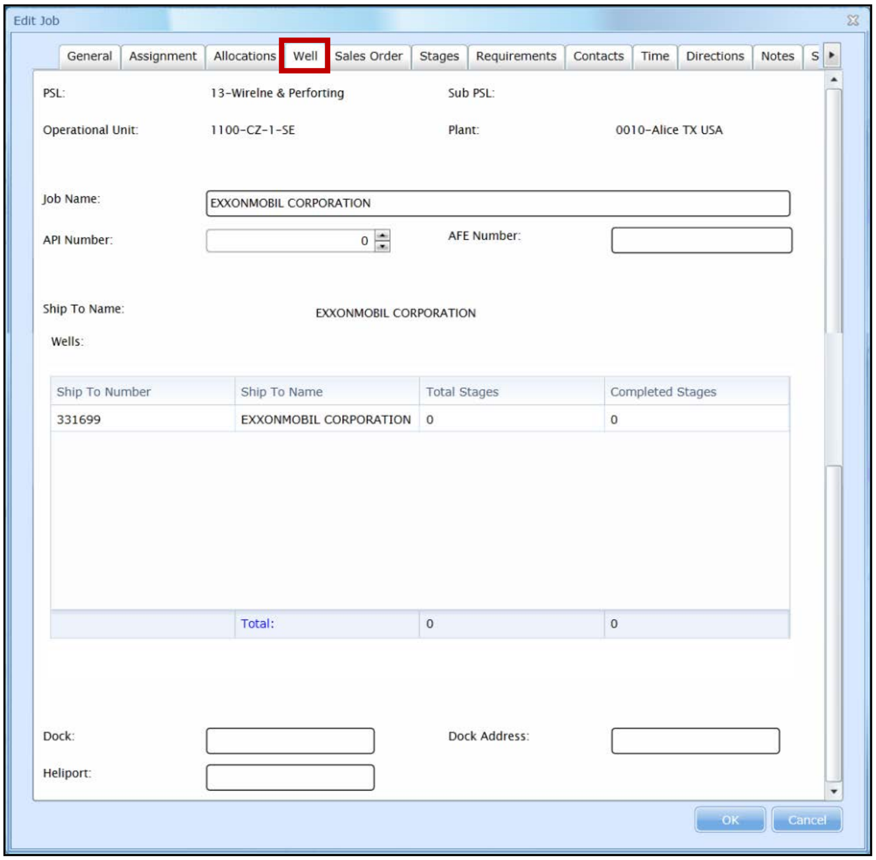
  - **Resource**: Displays the type of resource, for example, Individual, Equipment

  - **ID**: Displays the resource unique identifier (SAP ID#)

  - **Name**: Displays the name of the resource

- **Type**: Displays the title of the resource
- **Start Date:** Start date and time of allocation
- **Finish Date:** Finish date and time of allocation
- **Edit:** Button that allows user to edit the allocation for the resources
- **Commit:** Button that allows user to commit the edits made to allocations

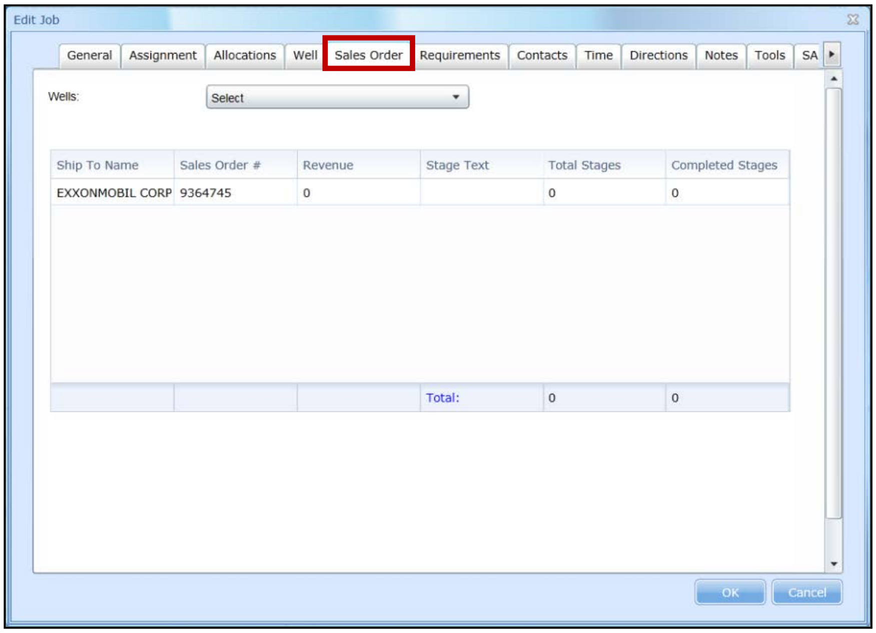
4. Well Tab



- **PSL**: Displays the Product Service Line
- **Sub PSL**: Displays a division within the primary Product Service Line
- **Operational Unit**: Displays the name of the operational unit of the job
- **Plant**: Displays the physical location to which the job is assigned
- **Job Name**: Used to enter more information pertaining to Job or Well. By default, the ship to name is entered, which consists of the customer name, well name, and number.
- **API Number**: A unique, numeric identifier assigned to each well by the American Petroleum Institute may be entered in this field.
- **AFE Number**: Used to enter the Authorization For Expenditures number of the job in this field
- **Ship To Name**: Displays the customer name, well name, and number

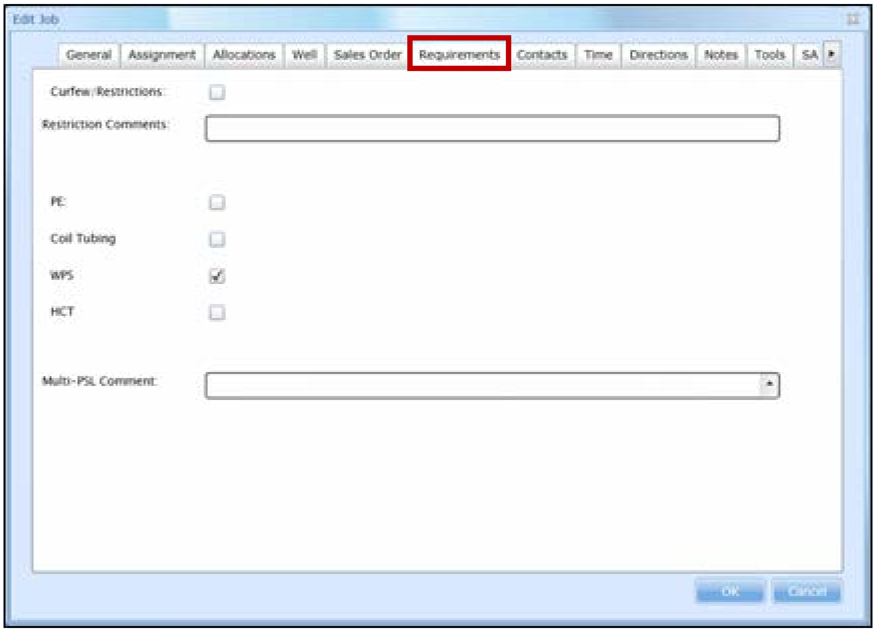
- **Wells Table**: Displays well details
  - **Ship To Number**: Displays SAP generated **Ship To** number
  - **Ship To Name**: Displays the name of the customer operating the well
  - **Total Stages**: Displays the number of stages the job comprises.
  - **Completed Stages**: Displays the number of stages completed for the job.
  - **Total:** Counts number of **Total Stages** and number of **Completed Stages** populated from the **Sales Order** tab.
- **Dock**: Used to enter dock information
- **Dock Address**: Used to enter the dock address
- **Heliport**: Used to enter heliport information

5. **Sales Order Tab**



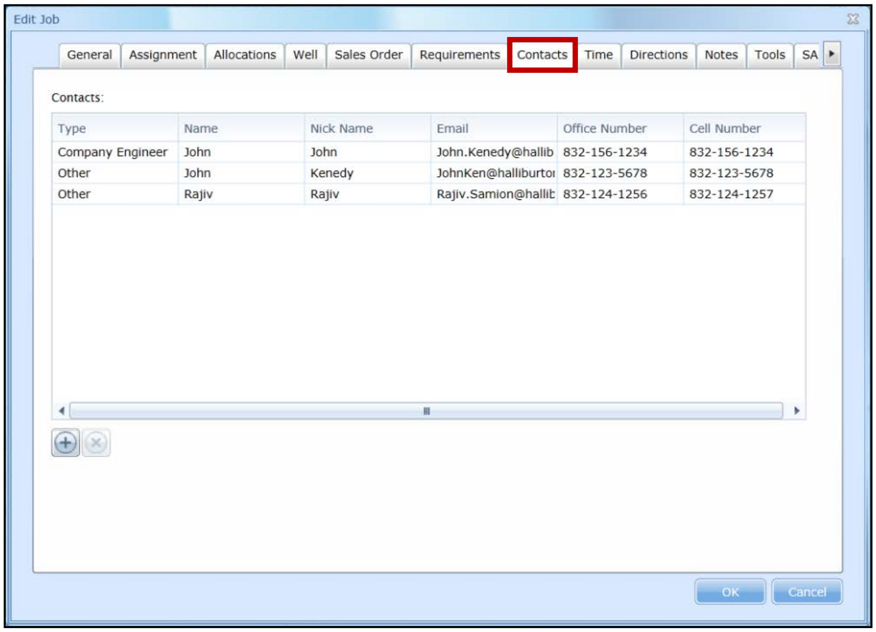
- **Wells**: Used to select the sales order/well. It will display the different ship to's.
- **Sales Order Table**: Displays a list of customer or well details for the selected value of the **Wells** dropdown
  - **Ship To Name**: Displays the the customer name, well name, and number
  - **Sales Order**: Displays the sales order number for the job
  - **Revenue**: Displays the proposed revenue the job will generate
  - **Stage Text**: Contains text concerning the stages of the job
  - **Total Stages**: Displays the number of stages for the job
  - **Completed Stages**: Displays the number of completed stages for the job
  - **Total**: Counts the number of **Total Stages** and the number of **Completed Stages**

6. Requirements Tab



- **Curfew/Restriction:** Check this box if there is a curfew or restrictions
- **Restriction Comments**: Field appears when **Curfew/Retriction** is checked. Used to add comments in the text box regarding restrictions
- **PE**: Check if **Production Enhancement** is involved in the job.
- **Coil Tubing**: Check if **Coil Tubing** is involved in the job.
- **WPS**: Check if **Wireline and Perforating Services** is involved in the job.
- **HCT**: Check if **Halliburton Completion Tools** is involved in the job.
- **Multi PSL Comment**: Used to enter comments regarding any of the Product Service Lines (PSLs) the job is supporting

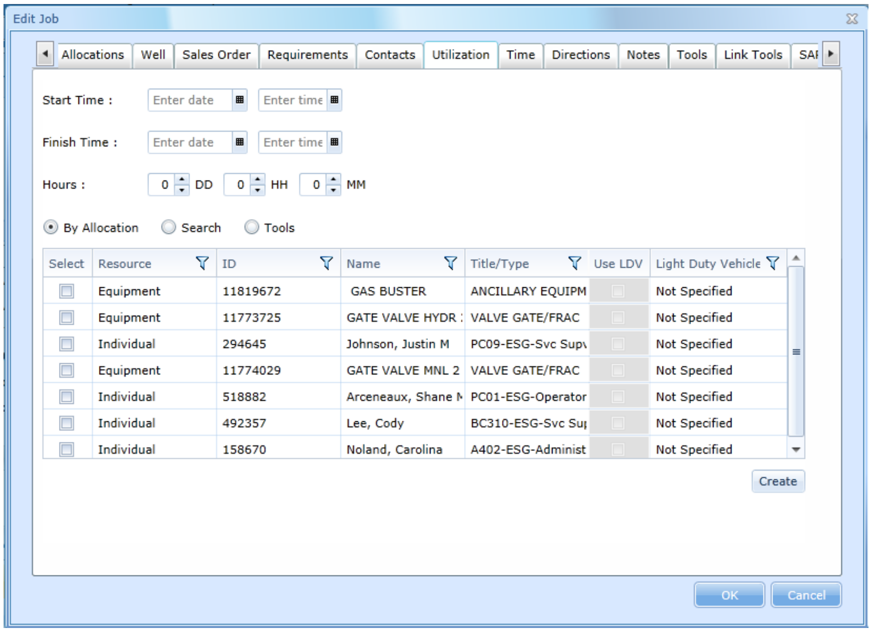
7. Contacts Tab



- **Contacts**: Displays a list of contacts associated with the job
  - **Type**: Displays the contact type
  - **Name**: Displays the first name of the contact
  - **Nick Name**: Displays a nickname for the contact
  - **Email**: Displays the email address for the contact
  - **Office Number**: Displays the office telephone number for the contact
  - **Cell Number**: Displays the mobile telephone number for the contact
- **Add Contacts**: To insert a contact details row in the **Contacts** table, click . The **Contacts Search** form is displayed. Search for, and then select, the desired contacts by marking the appropriate checkboxes in the form. When completed, click **OK**.

  NOTE: New **Contact** records are created in the **Job Builder** view. Click to create a new contact record.
- **Delete Contacts**: Click to delete a contact from the **Contacts** table. When completed, click **OK**

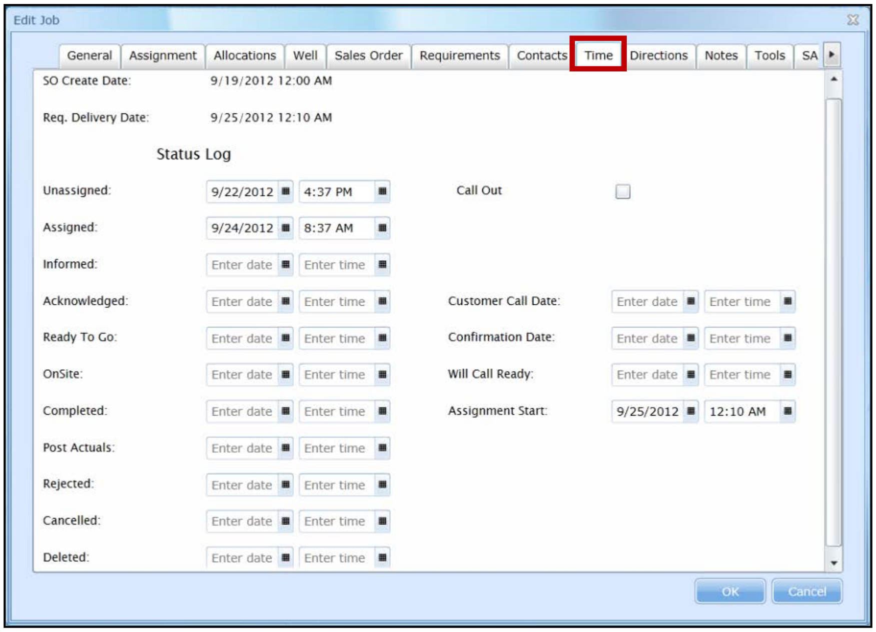
8. Utilization Tab



This tab is used to create Halliburton Resource Utilization records which can be viewed in the **Resource Utilization View.**

NOTE: See Quick Reference Card **Create Utilization Records** for how to create utilization records.

9. Time Tab

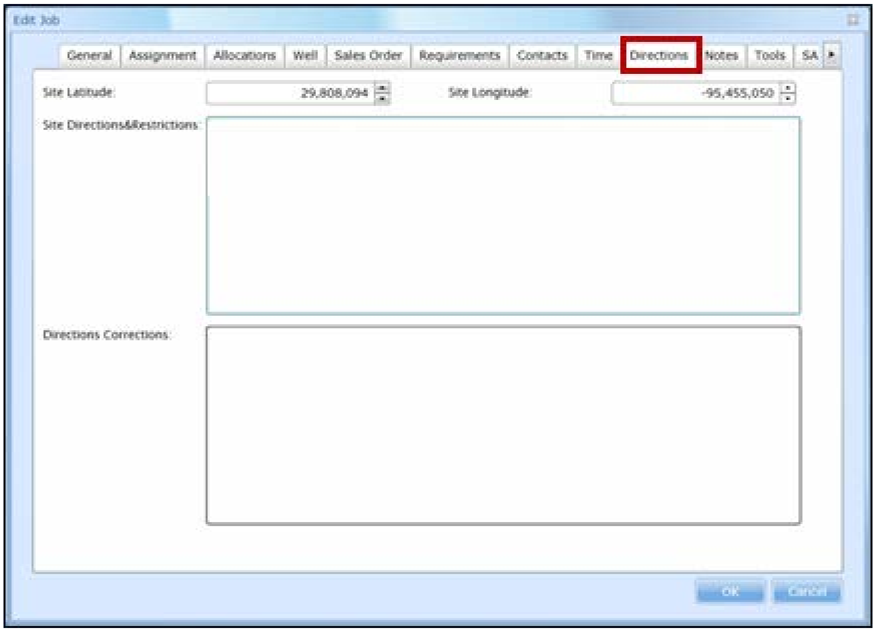


- **SO Create Date**: Displays the sales order creation date
- **Req. Delivery Date**: Displays the required delivery date and time of the job. This information is populated from the SAP sales order.
- **Status Log**: Displays the **Date** and **Time** information the job acquired a status update throughout the lifecycle of the job. It is a timestamp when statuses are changed but can be manually edited.
  - **Unassigned**: The job has passed from SAP to ClickSchedule, but the Scheduler has not yet assigned the job.
  - **Assigned**: The Scheduler has assigned the job by dragging the job to the Gantt.
  - **Informed**: The job has been sent to **Job Details**.
  - **Acknowledged**: The job has been acknowledged.
  - **Ready To Go**: Job Preparations are complete and crew is ready to leave the yard.
  - **On Site**: Crew has acknowledged the resources are on site.
  - **Completed**: Crew has indicated that the job has been completed.
  - **Post Actuals**: Partial and final post actuals have been performed and SAP has confirmed records posted and C status in SAP.
  - **Rejected**: In the event that a **Sales Order** is rejected in SAP, the time stamp of the rejection is passed to this field.
  - **Cancelled**: Used to enter the date and time for a job that has been cancelled. Cancelling a job in ClickSchedule doe not update any status in SAP.

- **Deleted**: In the event that a **Sales Order** is deleted rather than rejected in SAP, the time stamp of the deletion is passed to this field

- **Call Out**: Mark this checkbox if a job is spontaneous or a customer calls with a job.
- **Customer Call Date**: Used to enter the date the customer was called
- **Confirmation Date**: Used to enter the confirmation date
- **Will Call** / **On Loc Time**: Used to enter the date by which **Will Call** is due or time crew needs to be on location
- **Assignment Start**: Displays the intended start date and time of the job. The field may be edited.

10. Directions Tab



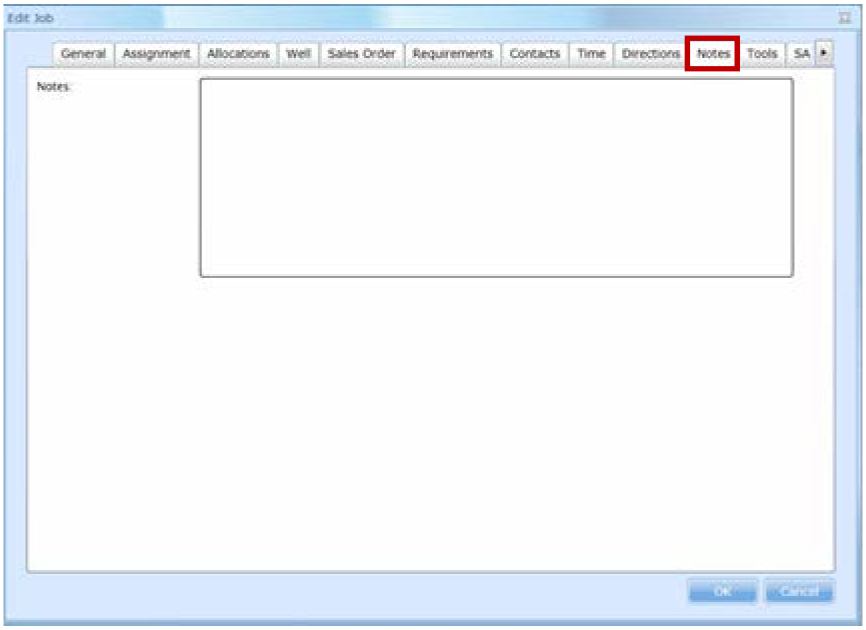
- **Site Latitude**: Default latitude information of the job site. This is based on the **Ship To** information.

- **Site Longitude**: Default longitude information of the job site. This is based on the **Ship To** information.

- **Site Directions & Restrictions**: Used to enter the directions to and restrictions for the site in the text box

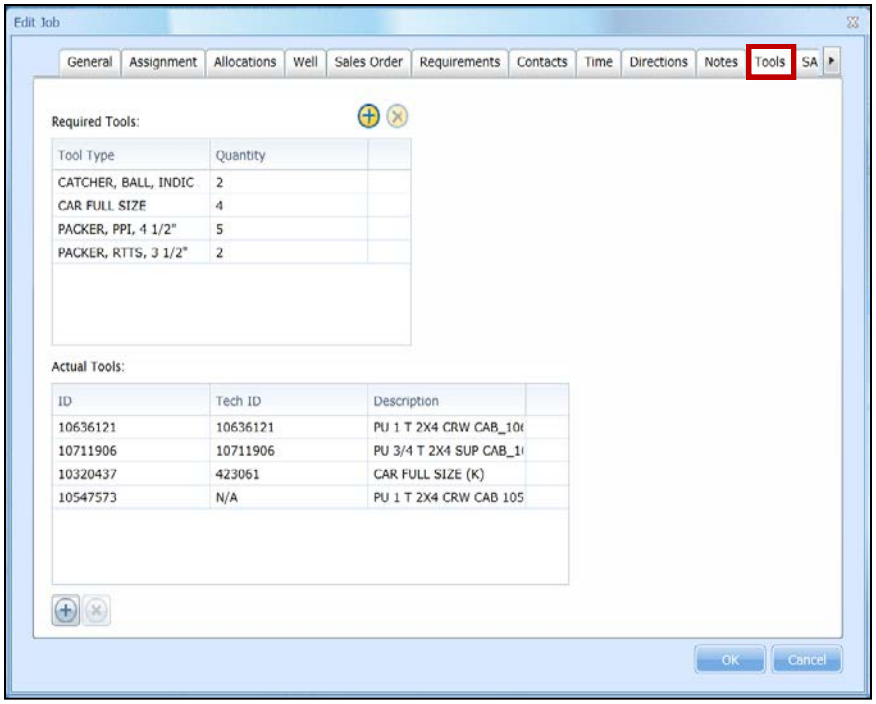
- **Direction Corrections**: Generally, this field is populated from corrections sent by the Mobile Lead User– road closures, etc.

11. Notes Tab



- **Notes**: Enter any job-related notes in the text area. This information is passed to **Job Details**.

12. Tools Tab



- **Required Tools**: Shows the tools which are required for a job. Click to insert a new tool record. To delete an existing tool record, select the record to be deleted and then click .

  ⇒ **Tool Type**: In the row header, click the **Tool Type** drop-down and then select the type of tool.

  ⇒ **Quantity**: In the row header, click the **Quantity** drop-down and then enter a whole number.

- **Actual Tools**: This table contains the records of the actual tools that were used on the job.

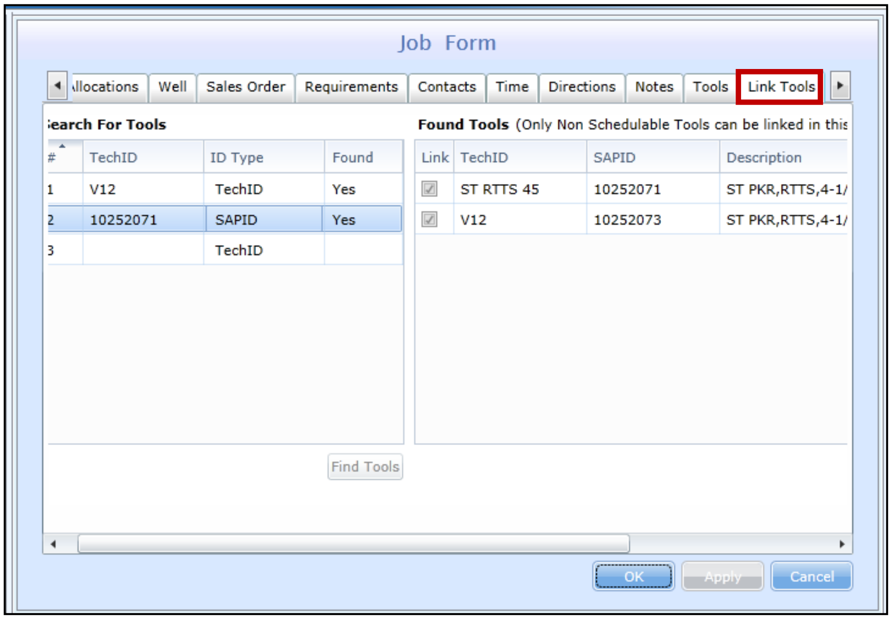
  ⇒ **ID**: Displays the unique identifier assigned to the tool

  ⇒ **Tech ID**: Displays the technical identifier of the tool

  ⇒ **Description**: Displays a brief description of the tool

  ⇒ **Add Actual Tools**: Click to open the **Equipment Manager** form. Filter the list as necessary, and then mark the checkbox associated with the tools or other equipment that was actually used on the job. Then, click **OK** to save the tool selections. To delete an existing tool record, select the record to be deleted and then click .

13. Link Tools Tab



- **Search For Tools:** Table allows searching for multiple tools at once. Enter **TechID/SAPID** and select the **ID Type**. To add another row, click the **Tab** key on your keyboard. Table searches for Schedulable and Non Schedulable equipment. Only **Non Schedulable Tools** can be linked. Please see **Link Tools Tab QRC** for more information and instructions.

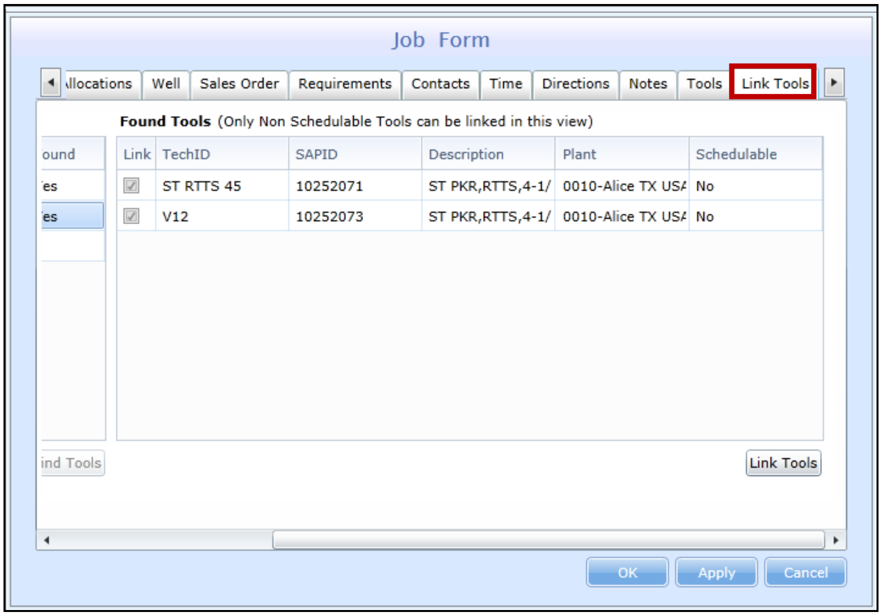
  - #: Identifies the number of tools you are searching.

  - **TechID:** Click the **TechID** box and enter a TechID or SAPID.

  - **ID Type:** Identify if the ID entered in the **TechID** column. Click the **ID Type** dropdown and then select the type of ID.

  - **Found**: Displays **Yes** or **No** once the **Find Tools** button is clicked. **Yes** means the tool was found and is added to the Found Tools panel. **No** means the tool was not found and was NOT added to the Found Tools panel.

  - **Find Tools Button**: Once **TechID** and **ID Type** are filled in, click the **Find Tools** button and the tools will display in the **Found Tools** section of the panel on the right side.

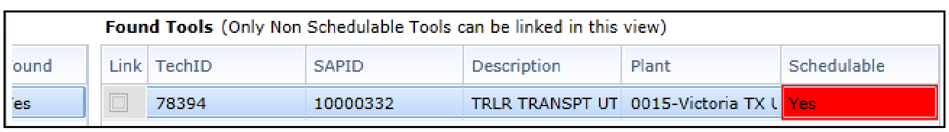


- **Found Tools**: Displays the tools found from the **Search for Tools** panel once you click the **Find Tools** button.

  - **Link Tools button:** Links all the tools that have the **Link** box **checked** in the **Tools** tab. Click the **Link Tools** button and pop up window displays describing the number of tools linked.

For Schedulable Tools:

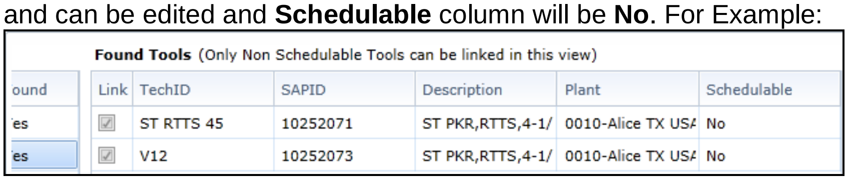
- **Link:** If a schedulable tool is searched, this checkbox will be unchecked and cannot be edited. For Example:



*The tool searched was schedulable and this is how it is viewed under **Found Tools** panel. Notice the **Link** checkbox is unchecked and **Schedulable** column is Yes and red.*

For Non Schedulable Tools:

- **Link:** Needs to be checked if you want the tool to appear on the **Tools** tab. If a non schedulable tool is searched, this checkbox will be checked and can be edited and **Schedulable** column will be **No**. For Example:



*The tool searched was not schedulable and this is how it is viewed under the **Found Tools** panel. Notice **Link** checkbox is checked and **Schedule** column is No.*

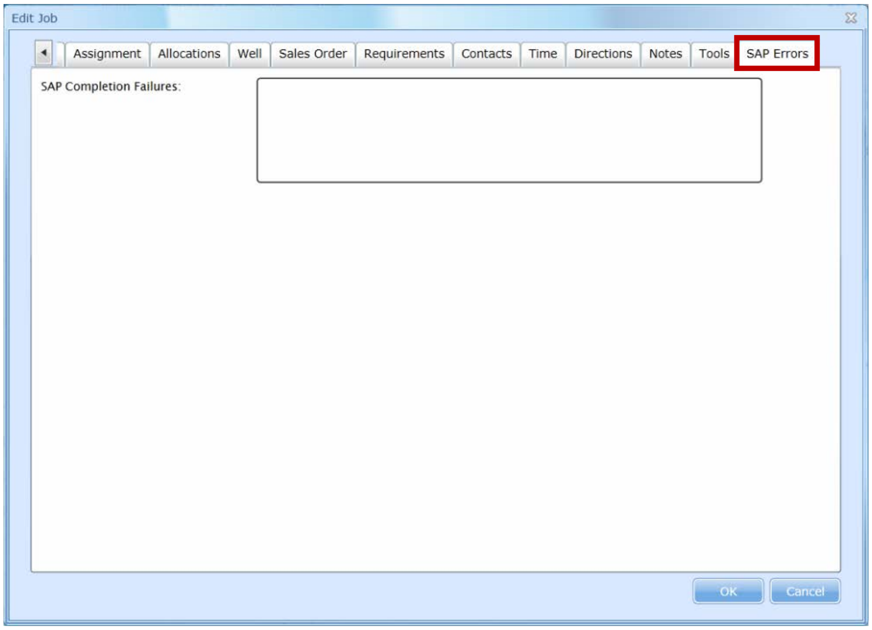
For Non Schedulable and Schedulable Tools:

- **TechID**: Displays the technical indentifier of the tool.
- **SAPID**: Displays the SAP identifier of the tool.
- **Description**: Displays a brief description of the tool.
- **Plant**: Displays the plant information.
- **Schedulable:** Displays whether the tool is Schedulable, **Yes** or not Schedulable, **No.**

NOTE:

- The **Link Tools** tab will not display for read only users
- **Link Tools** tab will not display for post actual, rejected, cancelled and deleted jobs

14. SAP Errors Tab



- **SAP Completion Failures**: SAP errors display in this box in the event that **Partial Post Actuals** fails. The type of SAP errors will be described

Edit Job Form - CEM

The **Edit Job** form holds all the relevant properties for a job. Information concerning the job may be edited from the **Job** list in the **Scheduling** view, an **Assigned** job on the **Resource Gantt**, or the **Job Builder** view.

NOTES:

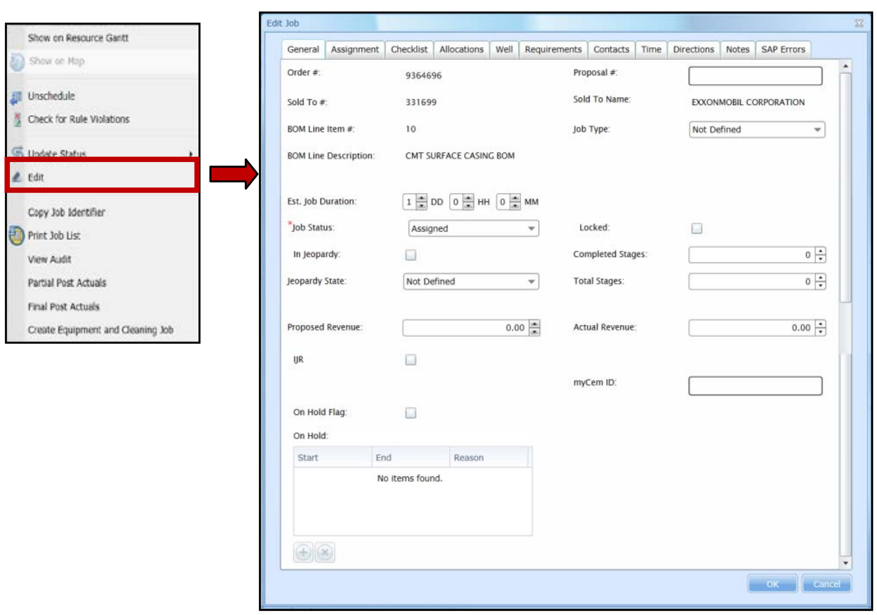
3. The **Assignment** tab only appears on the form when the job has been scheduled and in the **Scheduling** view.
4. Your PSL may not use all of the fields that are currently displayed in this document.

To view/edit the **Edit Job** form:

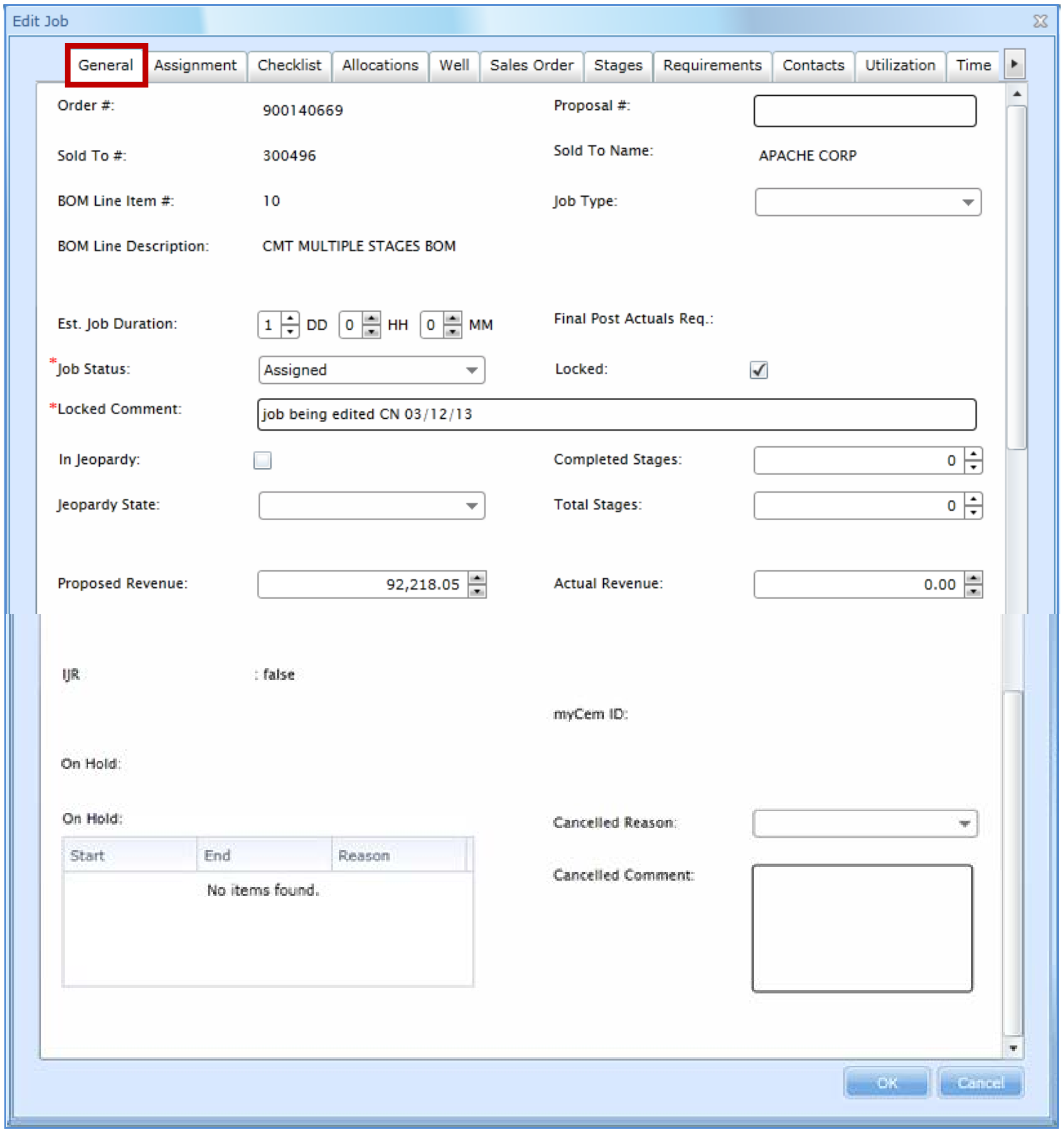
5. Right-click on the required job (from Job List/Gantt/Job Builder view). A list of options displays.

6. Select the **Edit** option. The **Edit Job** form displays

NOTE: You can also double-click any job to display the **Edit Job** form.



1. General Tab



- **Order #**: Displays sales order number of the job
- **Proposal #**: Displays the proposal number
- **Sold To**: Displays the customer number associated with the job
- **Sold to Name**: Displays the customer name associated with the job
- **BOM Line Item #**: Displays Bill of Materials line item number for the job
- **Job Type**: Displays the grouping of services and materials that will be provided for a job
- **BOM Line Description**: Displays the short Bill of Materials line description for the job

- **Est. Job Duration**: The field is populated with the estimated duration of the job, gate-to-gate

- **Job Status**: Displays the current status of the job

  NOTE: In most cases, after the Scheduler updates the status to **Informed**, subsequent statuses of the job are generally updated from **Job Details** (the ClickSchedule mobile application). However, if necessary, the job status can also be updated in the **Edit Job** form.

- **Locked**: Check this box if the job needs to be locked. It prevents the job from being assigned to another crew. This makes the **Locked Comment** field visible. When checked, the is visible in the Locked column of Job List.

- **Locked Comment:** Used to enter the reason in this text field for locking the job. This is a required field if the **Locked** checkbox is selected.

- **In Jeopardy**: Check this box if the job is **In Jeopardy**. When checked, this turns on the **In Jeopardy** indicator .

- **Jeopardy State:** Used to select the jeopardy reason

  NOTE: The **Jeopardy** checkbox and **In Jeopardy** reason may be auto-set due to business rules/policies that have not been met.

- **Completed Stages**: Used to enter the current stage value for the job

- **Total Stages**: Used to enter the total required stages of a job

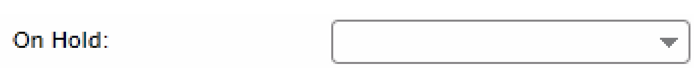
- **Proposed Revenue**: Used to display the proposed job revenue

- **Actual Revenue**: Used to enter the actual job revenue

- **IJR**: The **Irregular Job Report** checkbox when marked, indicates that job had unanticipated complications or problems

- **myCement ID**: References myCem's integrated Central Repository, Workflow, Expert System, and other components/technology, such as AccuBlend ,iFacts and Basis of Design

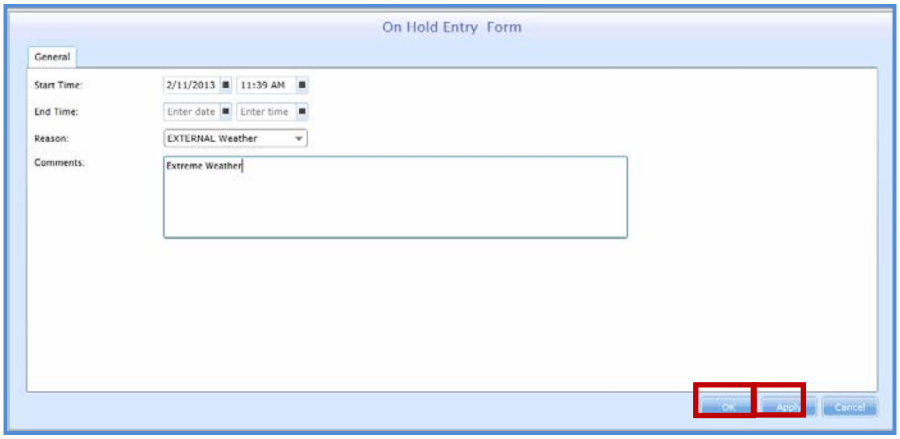
- **On Hold:** Use the drop down menu to select yes/no to indicate if the job is On Hold.



- The three columns that display on the **On Hold** table are:
  - **Start**: Select the time when the hold period starts.
  - **End**: Select the time when the hold period ends.
  - **Reason**: Select the **On Hold** reason for the job.

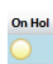
  Click the button to add a new row to the **Hold Time** table. Click the to delete a selected **Hold Time** record.

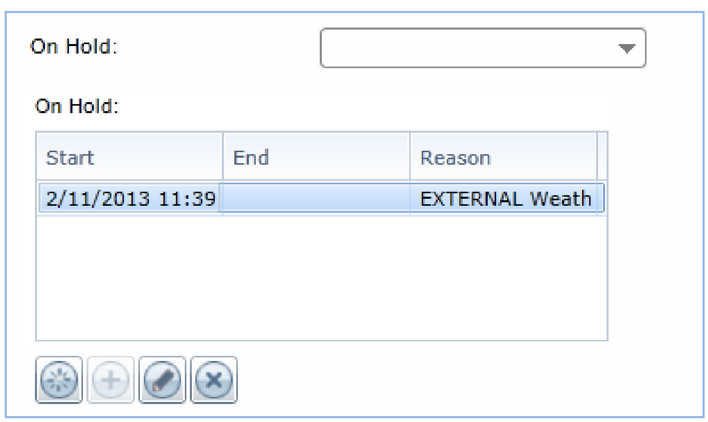
NOTE: To create a new **On Hold** record, you need to be in the **Job Builder View**, but you can delete **On Hold** records from **Job Builder** and **Scheduling** view table.



- **Start Time:** Used to select the date and time when the hold period starts
- **End Time:** Used to select the date and time when the hold period ends
- **Reason**: Used to select the **On Hold** reason for the job
- **Comments**: Free text field to describe the **On Hold** reason details

Note: Click the **Apply** button and then the **OK** button. The entry displays in the **On Hold** table.

Note: The On Hold  displays on the line item for the Sales Order and on the **Job List** and the **Resource Gantt**.

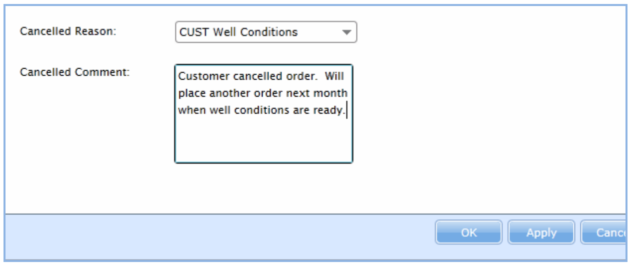


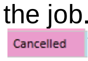
Note: To complete the **On Hold** table, click the line item to be completed, click , enter the **End Time** fields, click the **Apply** button, click the **OK** button. The table is now updated and the Job is no longer **On Hold.**

Note: Click  to delete a selected **Hold Time** record.

NOTE: All cancelled fields are only visible when you cancel a job.

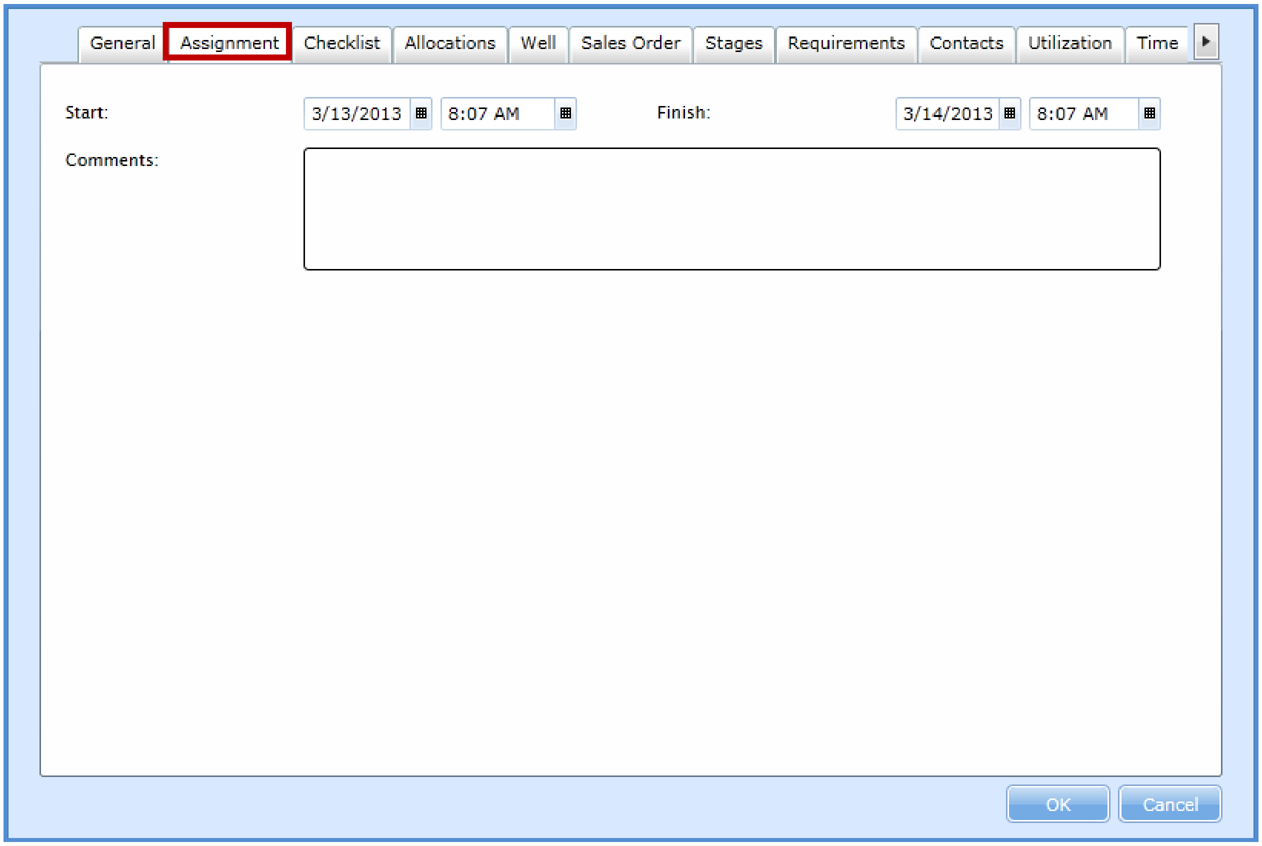
- **Cancelled Reason**: Used to select the reason for cancelling the job. This is a required field if the **Cancelled** checkbox is selected.
- **Cancelled Comment**: Free form text used to provide additional information for the job cancellation



Note: Click the **Apply** button and a pop-up message displays. Click Yes to cancel the job. Click the **OK** button and the job status will change to Cancelled (

) in the **Job Builder** view and on the Job List in the **Scheduling** view.

2. Assignments Tab



Note: Assignment tab is only visible in the **Scheduling View** once the job has been **Assigned**.

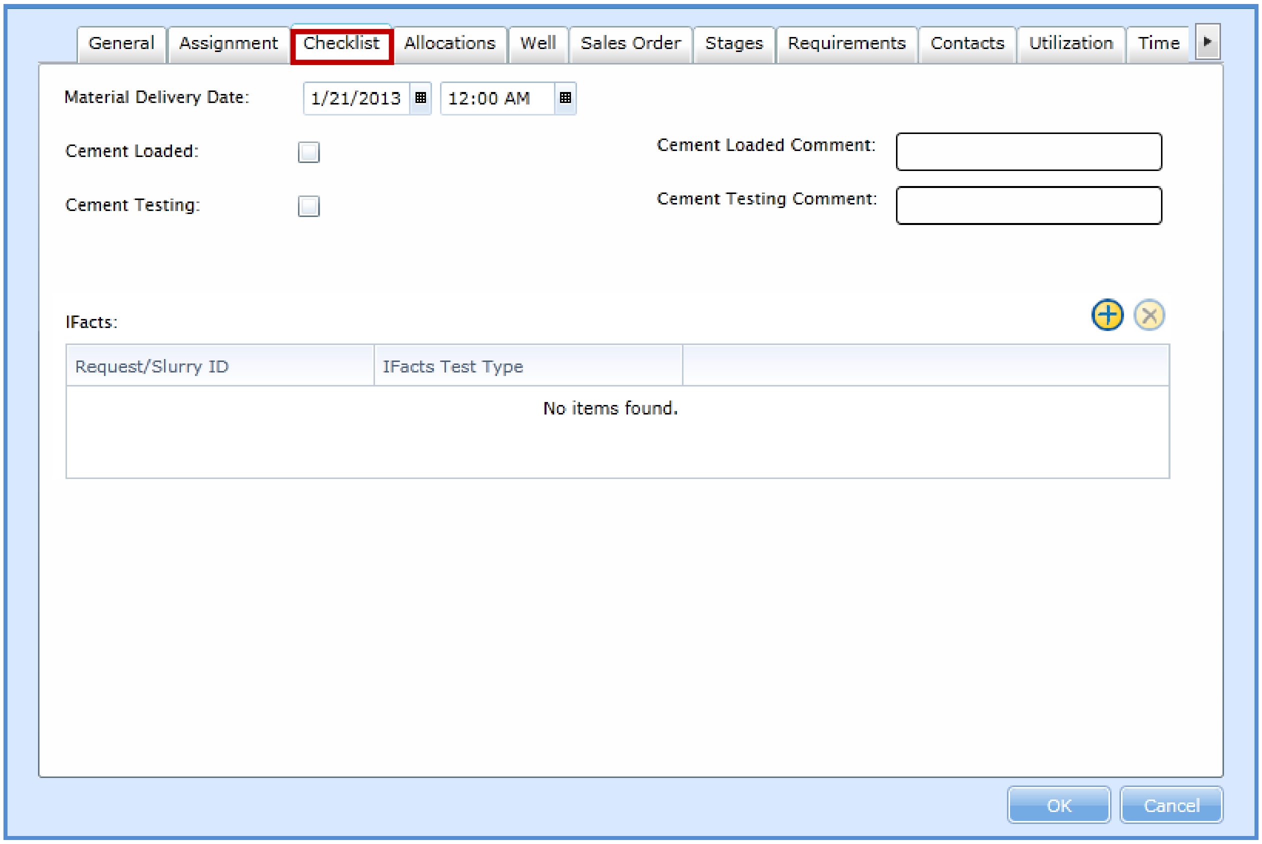
- **Start**: Displays the intended start date and time of the job (gate-to-gate). Populates when the job is dragged to the Gantt, but the field may be edited

- **Finish**: Displays the intended finish date and time of the job (gate-to-gate). Populates when the job is dragged to the Gantt but the field may be edited

  NOTE: The **Start Date** and **Time** is set when the job is dragged onto the **Resource Gantt** chart. After that, the start time can be edited. The finish date is adjusted in the mobile.

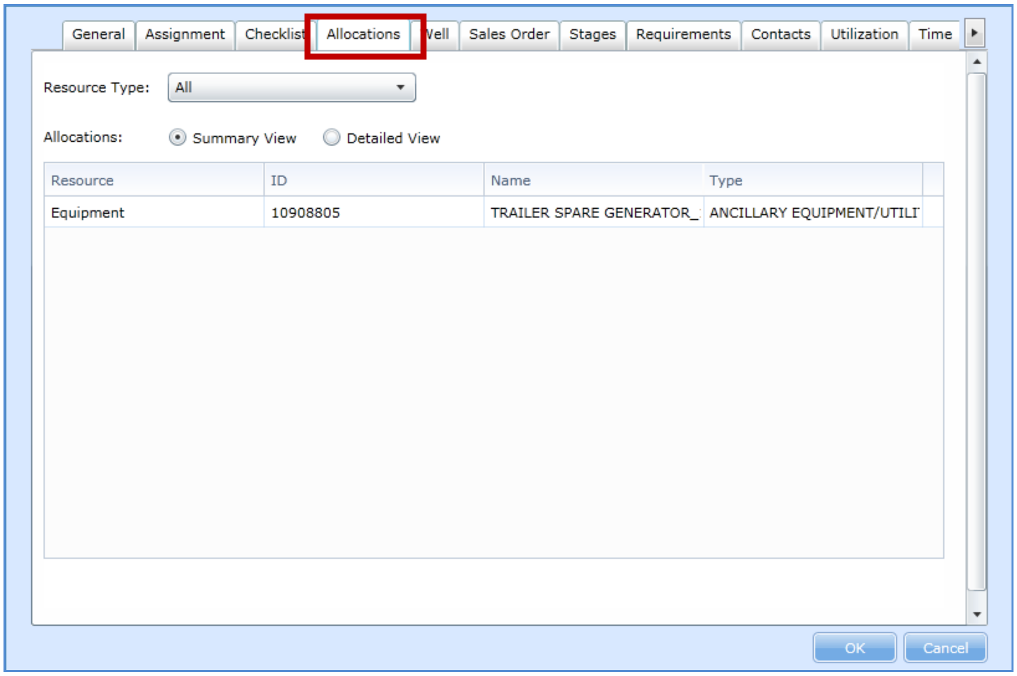
- **Comments**: Used to enter any comments related to the job

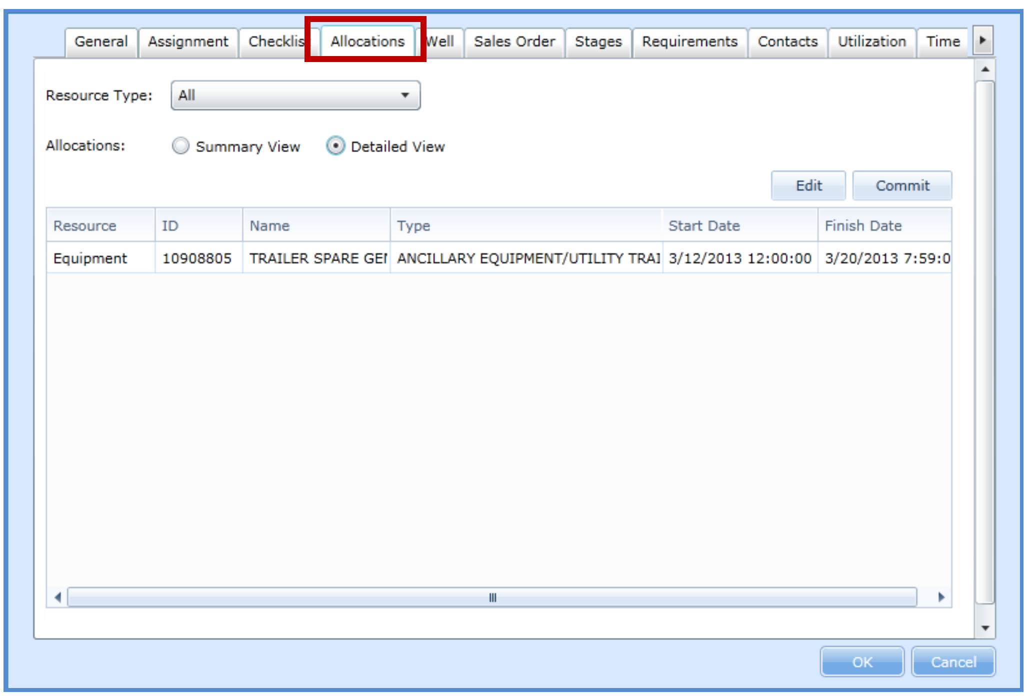
3. Checklist Tab



- **Material Delivery Date**: Used to enter the date and time of the material delivery. By default it is populated with the required delivery date from SAP. This may be changed as per the requirement.
- **Cement Loaded**: This checkbox is marked when cement is ready to be shipped to the job and the bins have been spotted and filled with cement
- **Ready Comments**: Enter comments concerning the readiness of cement in this text field
- **Cement Testing**: Use this checkbox to indicate that the lab testing of the cement is complete.
- **Testing Comments**: Enter comments concerning the readiness of cement in this text field
- **iFacts Grid**: Click button to enter a new **iFacts** record in the table. Alternatively, a selected **iFacts** record may be delete when is clicked.
- **iFacts ID**: Used for the unique Test identifier
- **iFacts Type**: Enter the type of test to be performed, for example, Lead, Trailer, Spacer

4. Allocations Tab





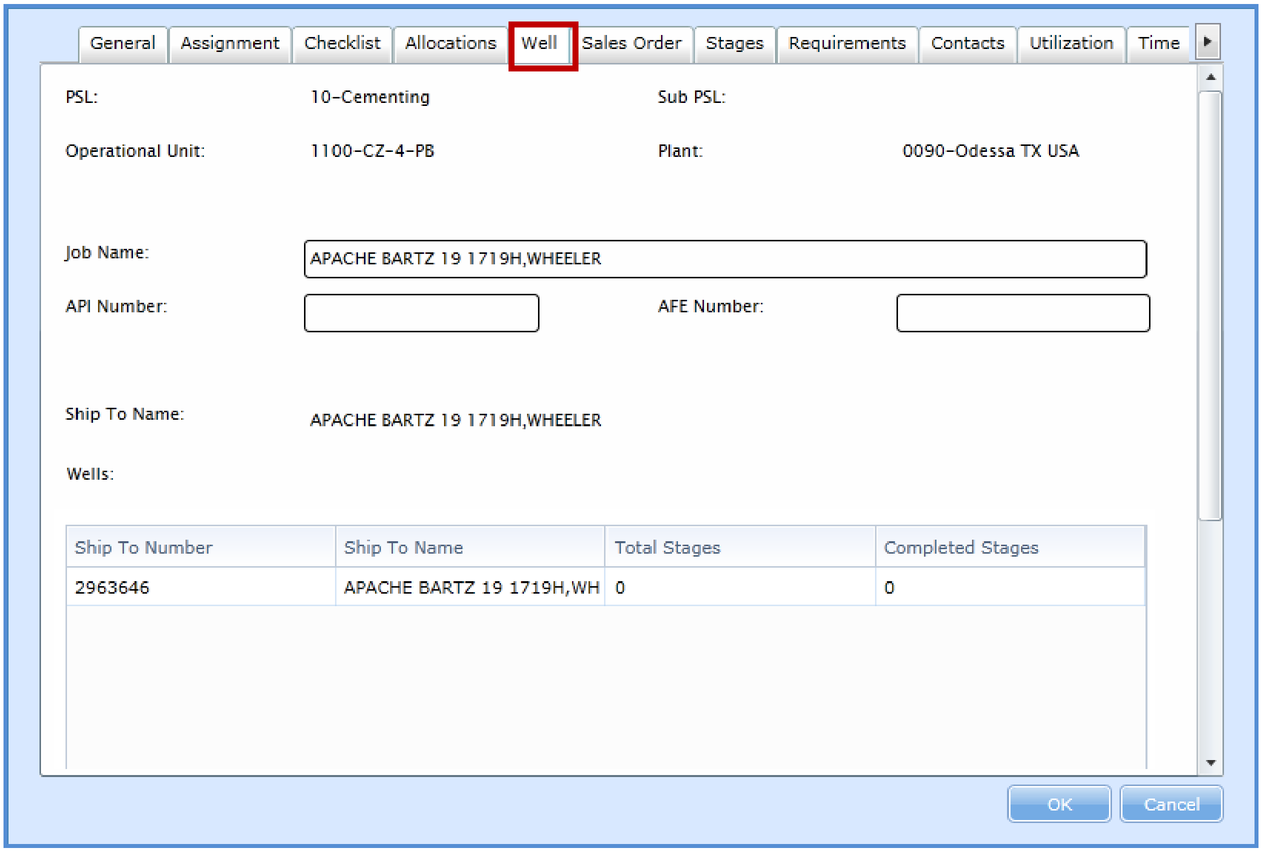
- **Resource Type**: Used to select the type of resource allocated to the job. The resources are then displayed in the **Allocations** table.

- **Allocations**: Displays the list of resources allocated to the job according to the selected value in the **Resource Type** drop-down.

  - **Summary View** : Summary list of allocations

- **Detailed View**: Detailed list of allocations and allocation times
- **Resource**: Displays the type of resource, for example, Individual, Equipment
- **ID**: Displays the resource unique identifier (SAP ID#)
- **Name**: Displays the name of the resource
- **Type**: Displays the title of the resource
- **Start Date:** Start date and time of allocation
- **Finish Date:** Finish date and time of allocation
- **Edit:** Button that allows user to edit the allocation for the resources
- **Commit:** Button that allows user to commit the edits made to allocations

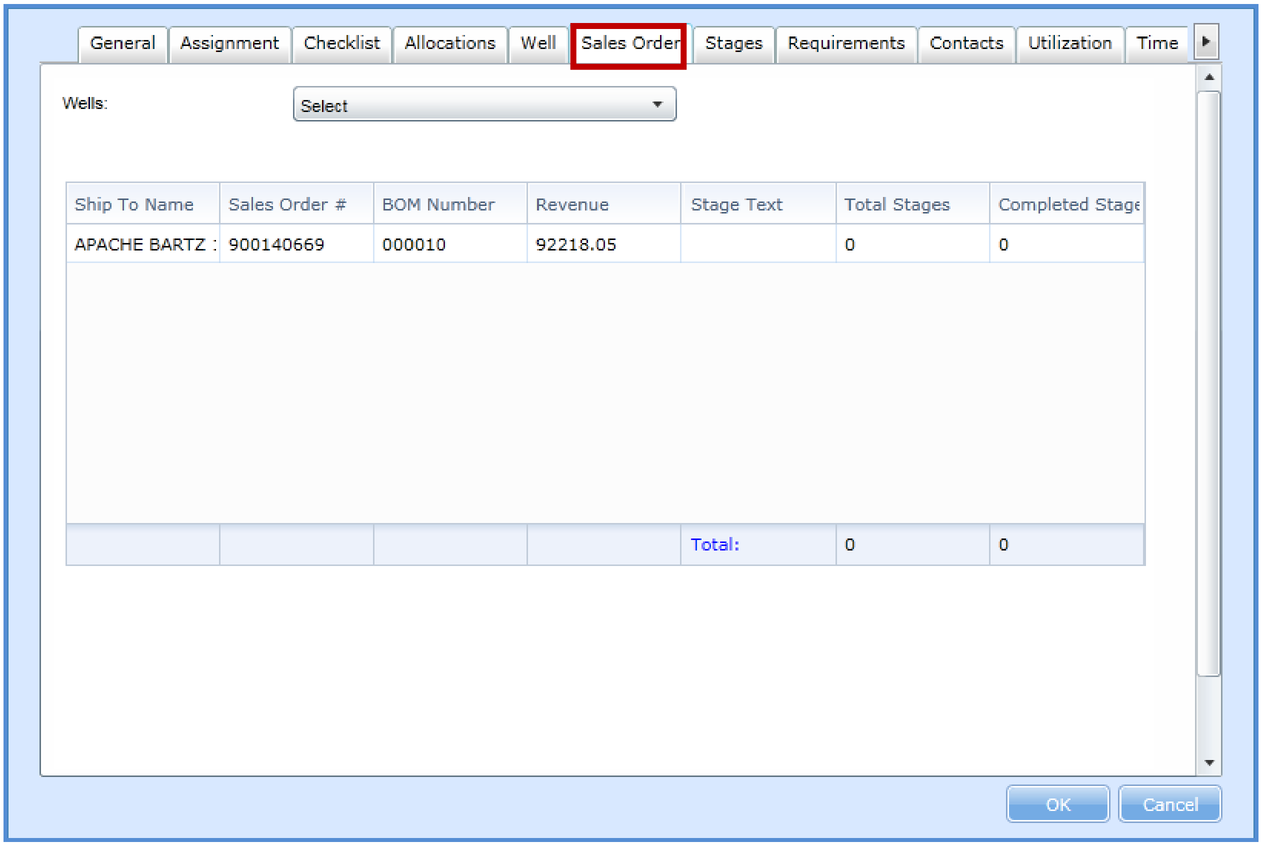
5. Well Tab



- **PSL**: Displays the Product Service Line
- **Sub PSL**: Displays a division within the primary Product Service Line
- **Operational Unit**: Displays the name of the operational unit of the job
- **Plant**: Displays the physical location to which the job is assigned
- **Job Name**: Used to enter more information pertaining to Job or Well. By default, the ship to name is entered, which consists of the customer name, well name, and number.
- **API Number**: A unique, numeric identifier assigned to each well by the American Petroleum Institute may be entered in this field.
- **AFE Number**: Used to enter the Authorization For Expenditures number of the job in this field
- **Ship To Name**: Displays the customer name, well name, and number

- **Wells Table**: Displays well details
  - **Ship To Number**: Displays SAP generated **Ship To** number
  - **Ship To Name**: Displays the name of the customer operating the well
  - **Total Stages**: Displays the number of stages the job comprises. N/A for Cementing.
  - **Completed Stages**: Displays the number of stages completed for the job. N/A for Cementing.
  - **Total:** Counts number of **Total Stages** and number of **Completed Stages** populated from the **Sales Order** tab. N/A for Cementing.
- **Dock**: Used to enter dock information
- **Dock Address**: Used to enter the dock address
- **Heliport**: Used to enter heliport information

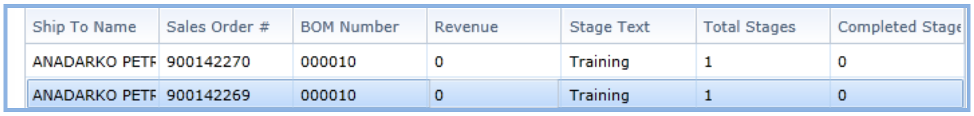
6. Sales Order Tab

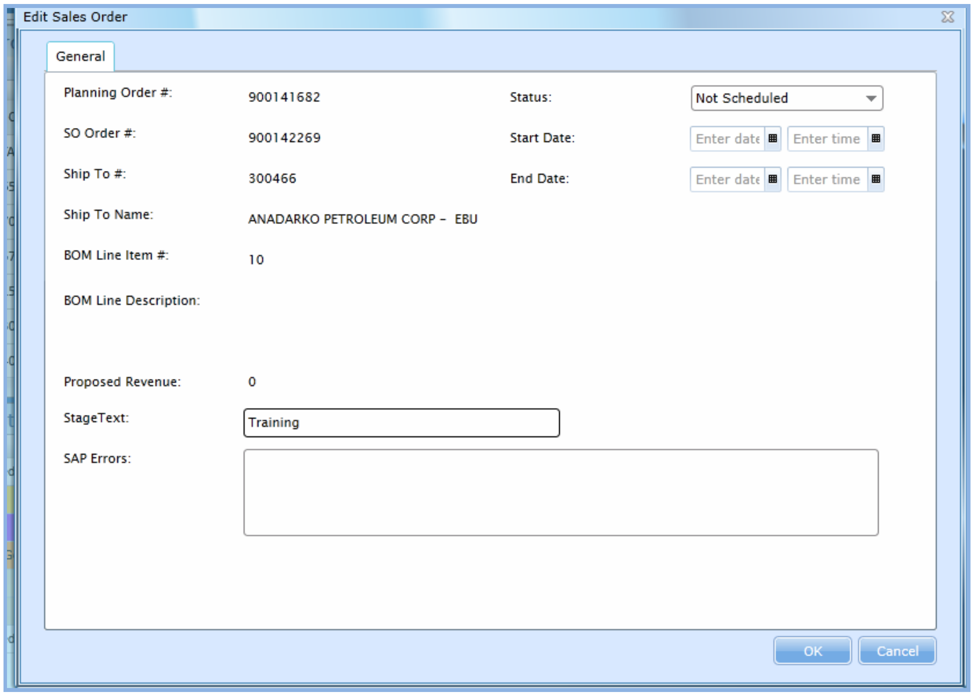


- **Wells**: Used to select the sales order/well. It will display the different ship to's.
- **Sales Order Table**: Displays a list of customer or well details for the selected value of the **Wells** dropdown
  - **Ship To Name**: Displays the the customer name, well name, and number
  - **Sales Order**: Displays the sales order number for the job
  - **Revenue**: Displays the proposed revenue the job will generate
  - **Stage Text**: Contains text concerning the stages of the job
  - **Total Stages**: Displays the number of stages for the job
  - **Completed Stages**: Displays the number of completed stages for the job
  - **Total**: Counts the number of **Total Stages** and the number of **Completed Stages**

NOTE: When using Planned Orders, Order Type ZBPO, and the ZOH Sales Order **does not** have any stages, it will be necessary to update the ZOH sales order with the "Sales Order End Date" manually. See **How to add end date for ZOH child QRC**.

Select the sales order without stages and double click on the line item that is highlighted the **Edit Sales Order** form appears.

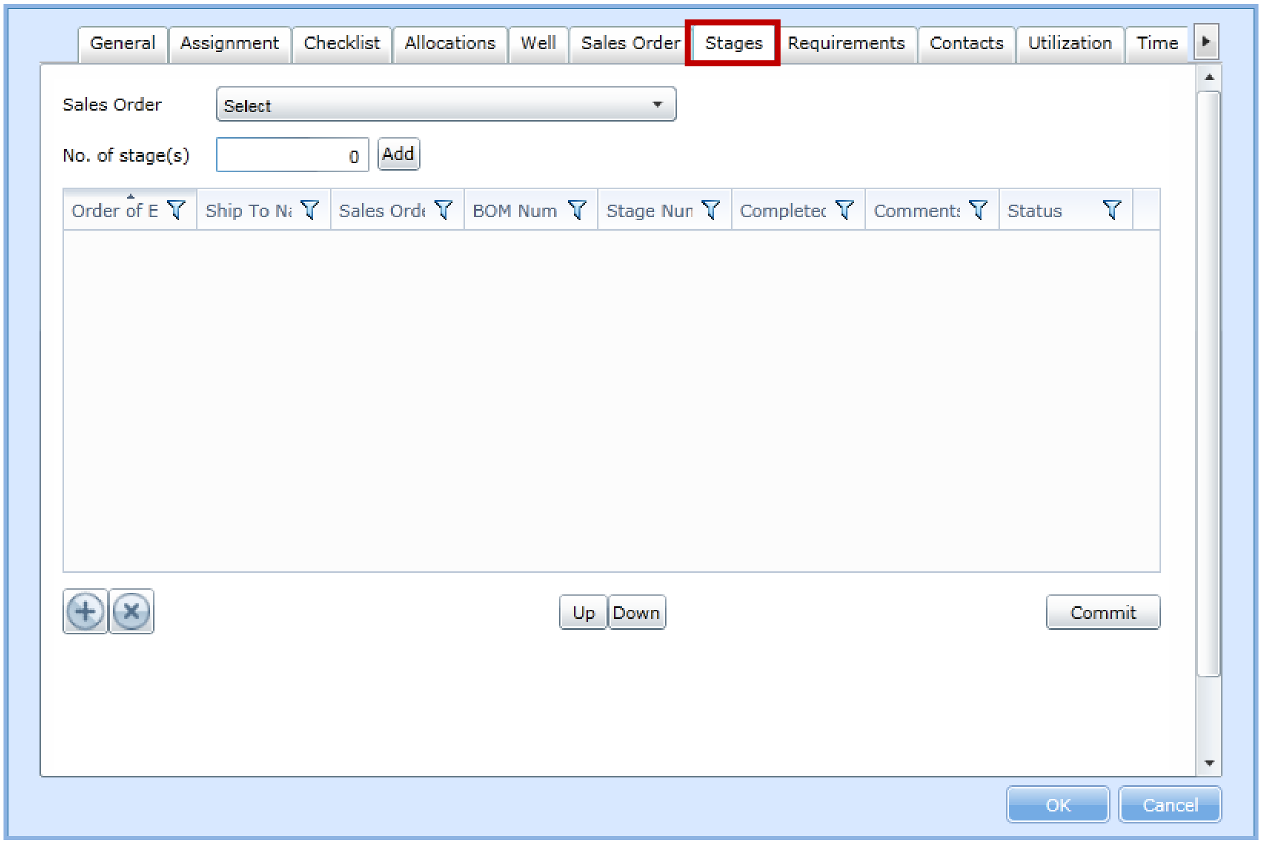




NOTE: The **End Date** and **End Tim**e must be entered. If the ZOH (associated to the ZBPO sales order) has stages, the completed date and time for the last stage will populate the ZOH end date and time.

NOTE: If there are errors during the partial posting of the ZOH order, it will display in the **SAP Errors** field. Refer to the QRC's, **Resolve Resource Utilization** and **Resource Utilization View** for further details on how to resolve resource utilization errors.

7. Stages Tab (used in the GOM)



- **Sales Order**: From the drop-down, choose the **Sales Order** in which to display the detail records in the **Stage** table.
- **No. of Stage(s)**: Used to enter the number of stages incorporated in the job
- **Add**: Click Add button to automatically calculate stages
- **Stage Details Table**: Displays the details of the stages

  NOTE: Click  on any of the column headers to filter the column data.

  – **Order of Execution**: Displays the execution order of the stages

  – **Ship To Name**: Displays the combination of the customer and well name

  – **Sales Order**: Displays the sales order number for the job

  – **Stage Number**: Displays the number of the stage

  – **Completed Date**: Displays the date the stage was completed

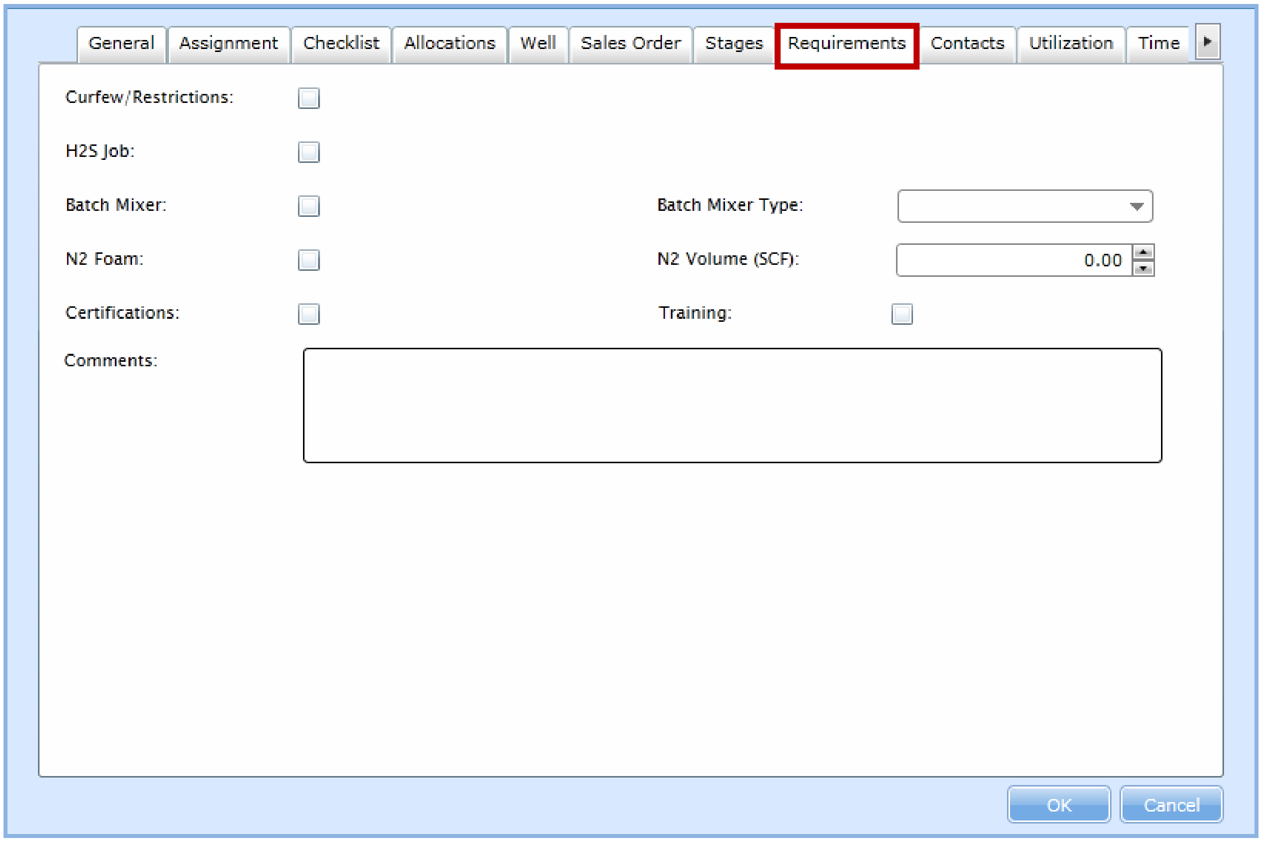
  – **Comments**: Displays comments concerning the associated stage

  – **Status**: Displays Completed or Skipped based on entry from mobile

- **Add**: Click to insert another row into the **Stages** table.
- **Delete**: Click to remove a selected row in the **Stages** table.
- **Up**: Click Up to move the selected row up in the **Stages** table.
- **Down**: Click Down to move the selected row down in the **Stages** table.
- **Commit**: Click Commit to save the layout of the **Stages** table.

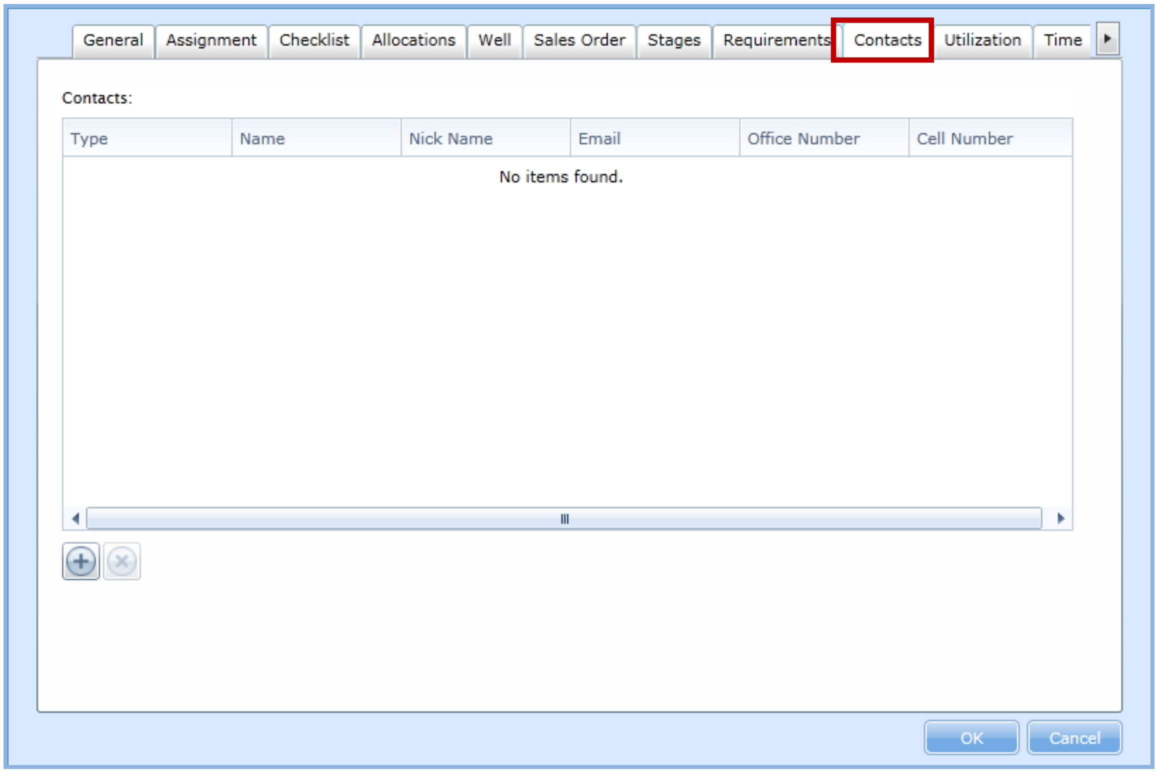
NOTE: If the job is in a status prior to complete, stages can be reassigned to another ZOH (associated with that ZPBO sales order). See the **Setting up Individual Stages QRC** for steps on adding and updating stages**.**

8. Requirements Tab



- **Curfew/Restriction**: Check this box if there is a curfew or restrictions.
- **Restriction Comments**: Field displays when the **Curfew/Restriction** checkbox is checked. Used to add comments in the text box regarding restrictions.
- **H2S Job**: Check this box if the job is a HS2 job
- **Batch Mixer**: Mark this checkbox if a Batch Mixer is used on a job
- **Batch Mixer Type**: If a Batch Mixer is used, select the type
- **N2 Foam**: Check this box if nitrogen foam is required for this job
- **N2 Volume (SCF)**: Enter a whole number indicating in Standard Cubic Feet, the volume of nitrogen
- **Certifications**: Mark this checkbox if any certifications are required for the job
- **Training**: Mark this checkbox if any customer training is required for this job.
- **Comments**: Used to enter any comments regarding certifications, training or any other special skill sets

9. Contact Tab

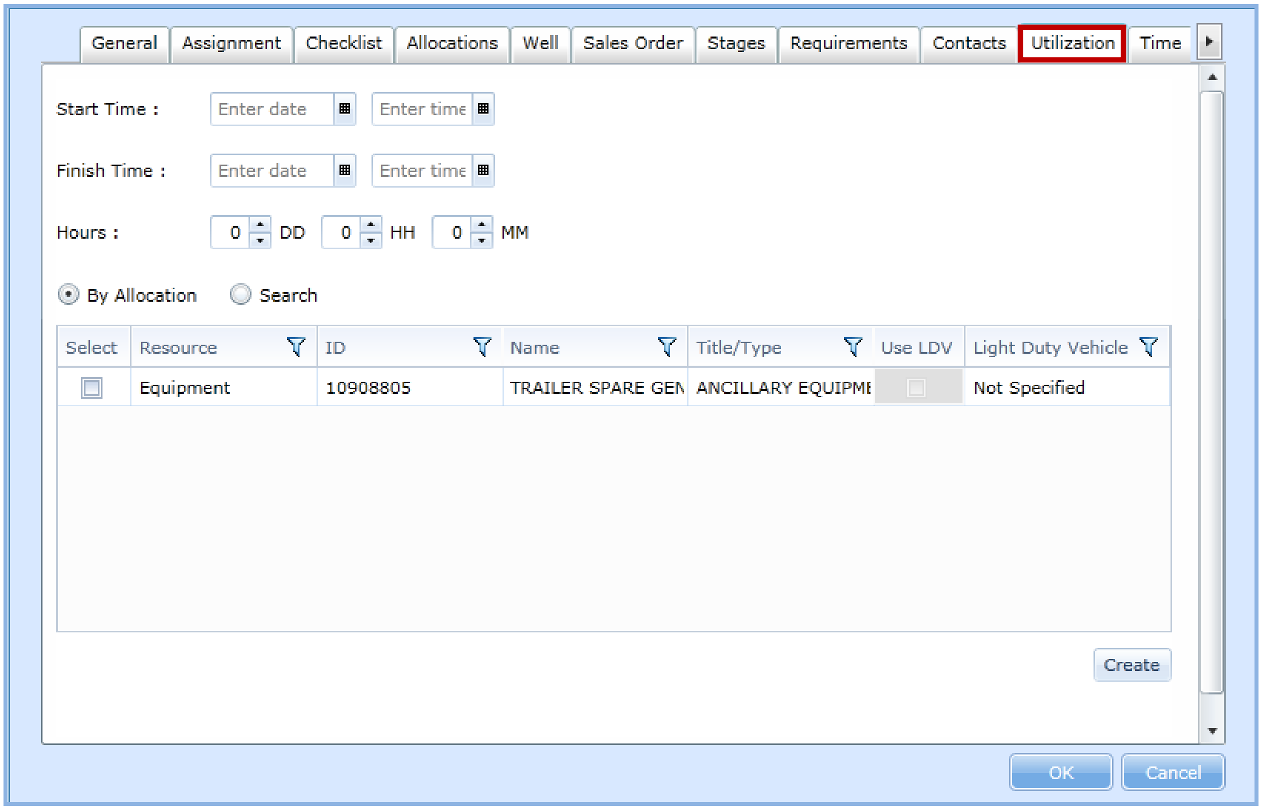


- **Contacts**: Displays a list of contacts associated with the job
  - **Type**: Displays the contact type
  - **Name**: Displays the first name of the contact
  - **Nick Name**: Displays a nick name for the contact
  - **Email**: Displays the email address for the contact
  - **Office Number**: Displays the office telephone number for the contact
  - **Cell Number**: Displays the mobile telephone number for the contact
- **Add Contacts**: To insert a contact details row in the **Contacts** table click . The **Contacts Search** form is displayed. Search for, and then select the desired contacts by marking the appropriate checkboxes in the form. When completed, click the **OK** button.

  NOTE: New **Contact** records are created in the **Job Builder** view. Click  to create a new contact record.

- **Delete Contacts**: Click  to delete a contact from the **Contacts** table. When completed, click the **OK** button.

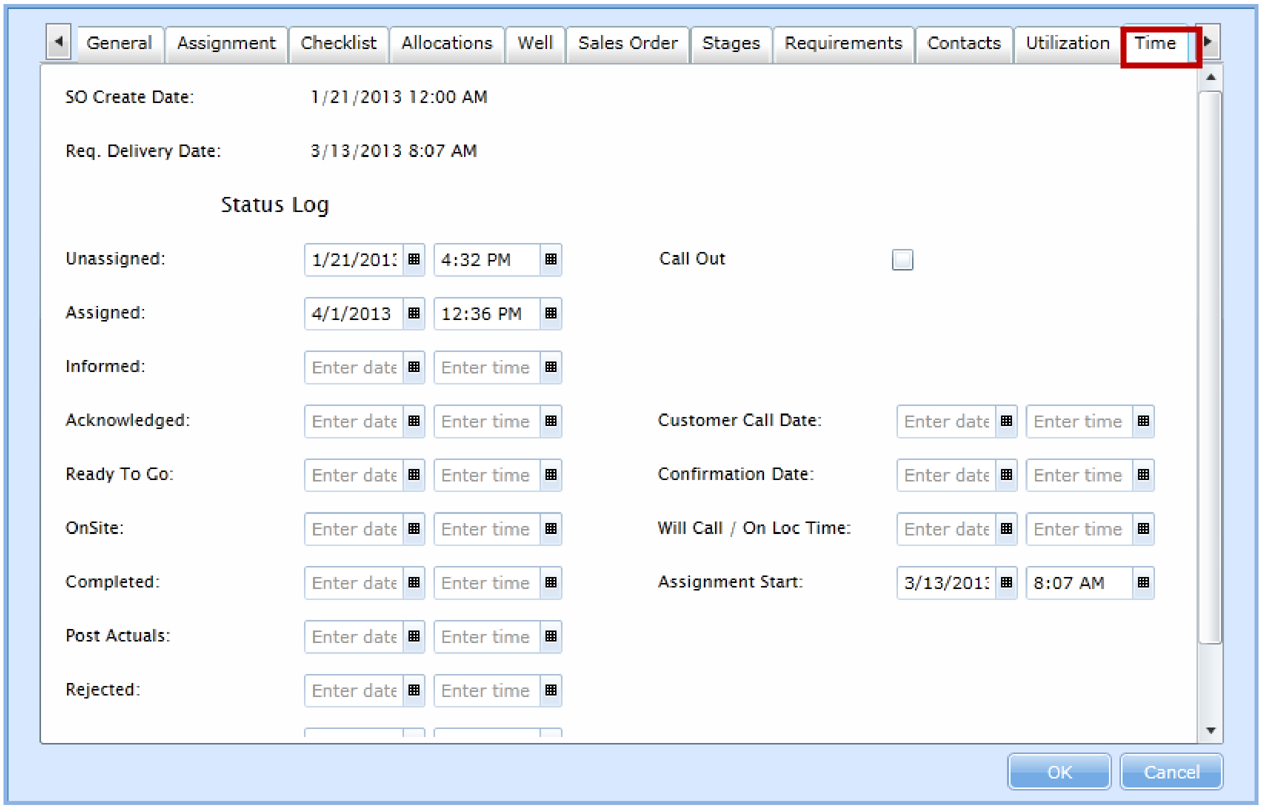
10. Utilization Tab



This tab is used to create Halliburton Resource Utilization records which can be viewed in the **Resource Utilization View**.

NOTE: See the **Create Utilization Records** Quick Reference Card for how to create utilization records.

11. Time Tab

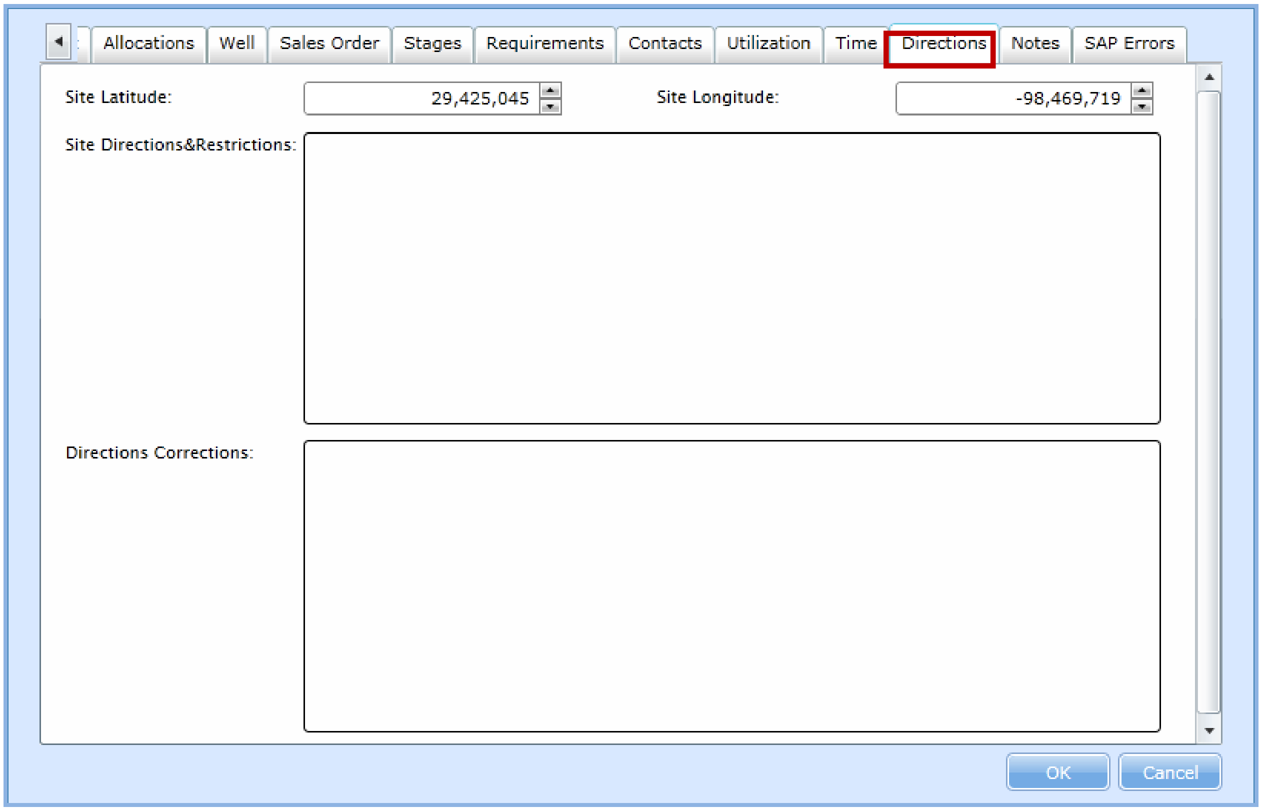


- **SO Create Date**: Displays the sales order creation date
- **Req. Delivery Date**: Displays the required delivery date and time of the job. This information is populated from the SAP sales order.
- **Status Log**: Displays the **Date** and **Time** information the job acquired a status update throughout the lifecycle of the job. It is a timestamp when statuses are changed but can be manually edited.
  - **Unassigned**: The job has passed from SAP to ClickSchedule, but the Scheduler has not yet assigned the job.
  - **Assigned**: The Scheduler has assigned the job by dragging the job to the Gantt.
  - **Informed**: The job has been sent to **Job Details**.
  - **Acknowledged**: The job has been acknowledged.
  - **Ready To Go**: Job Preparations are complete, and the crew is ready to leave the yard.
  - **On Site**: Crew has acknowledged the resources are on site
  - **Completed**: Crew has indicated that the job has been completed
  - **Post Actuals**: Partial and final post actuals have been performed and SAP has confirmed records posted and C status in SAP.

- **Rejected**: In the event that a **Sales Order** is rejected in SAP, the time stamp of the rejection is passed to this field.
- **Cancelled**: Used to enter the date and time for a job that has been cancelled. Cancelling a job in ClickSchedule does not update any status in SAP.
- **Deleted**: In the event that a **Sales Order** is deleted rather than rejected in SAP, the time stamp of the deletion is passed to this field.

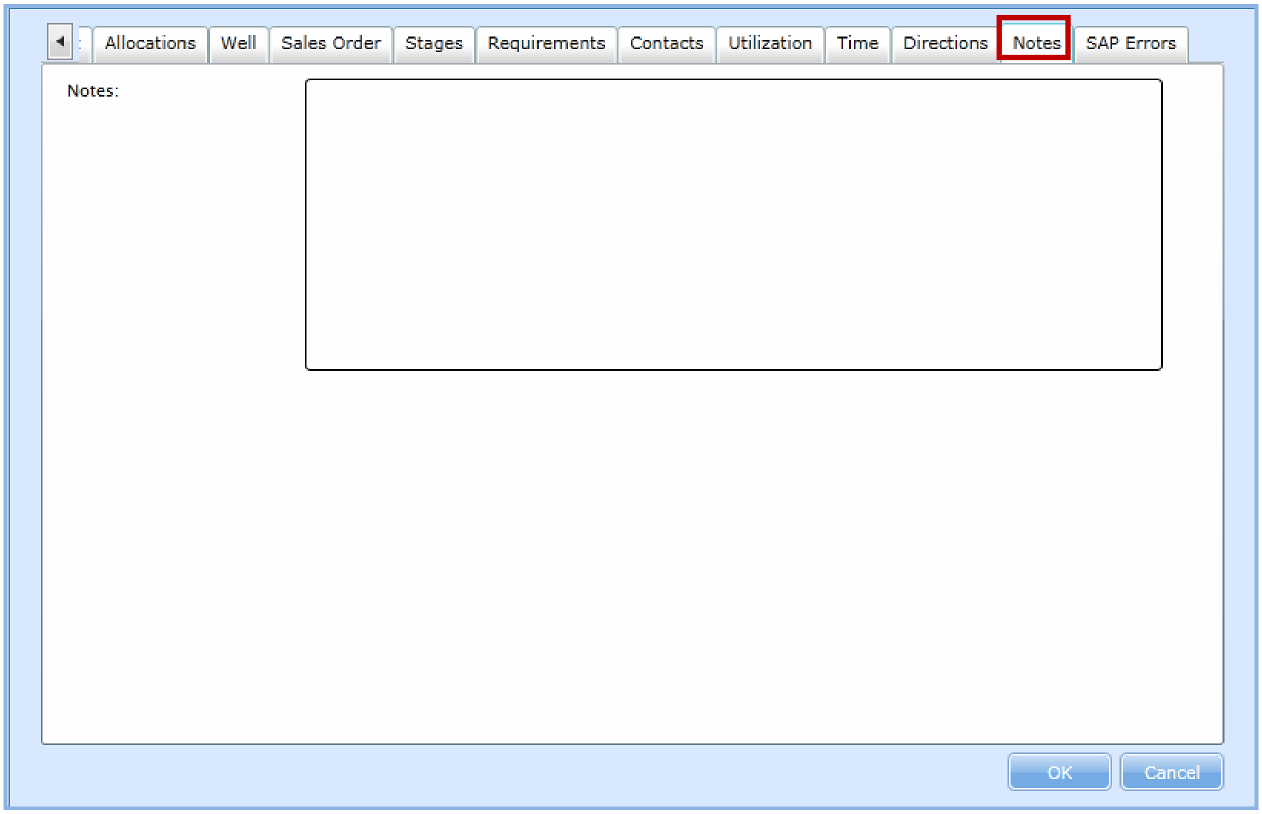
- **Call Out**: Mark this checkbox if a job is spontaneous or a customer calls with a job.
- **Customer Call Date**: Used to enter the date the customer was called
- **Confirmation Date**: Used to enter the confirmation date
- **Will Call** / **On Loc Time**: Used to enter the date by which **Will Call** is due or time crew needs to be on location
- **Assignment Start**: Displays the intended start date and time of the job. The field may be edited

12. Directions Tab



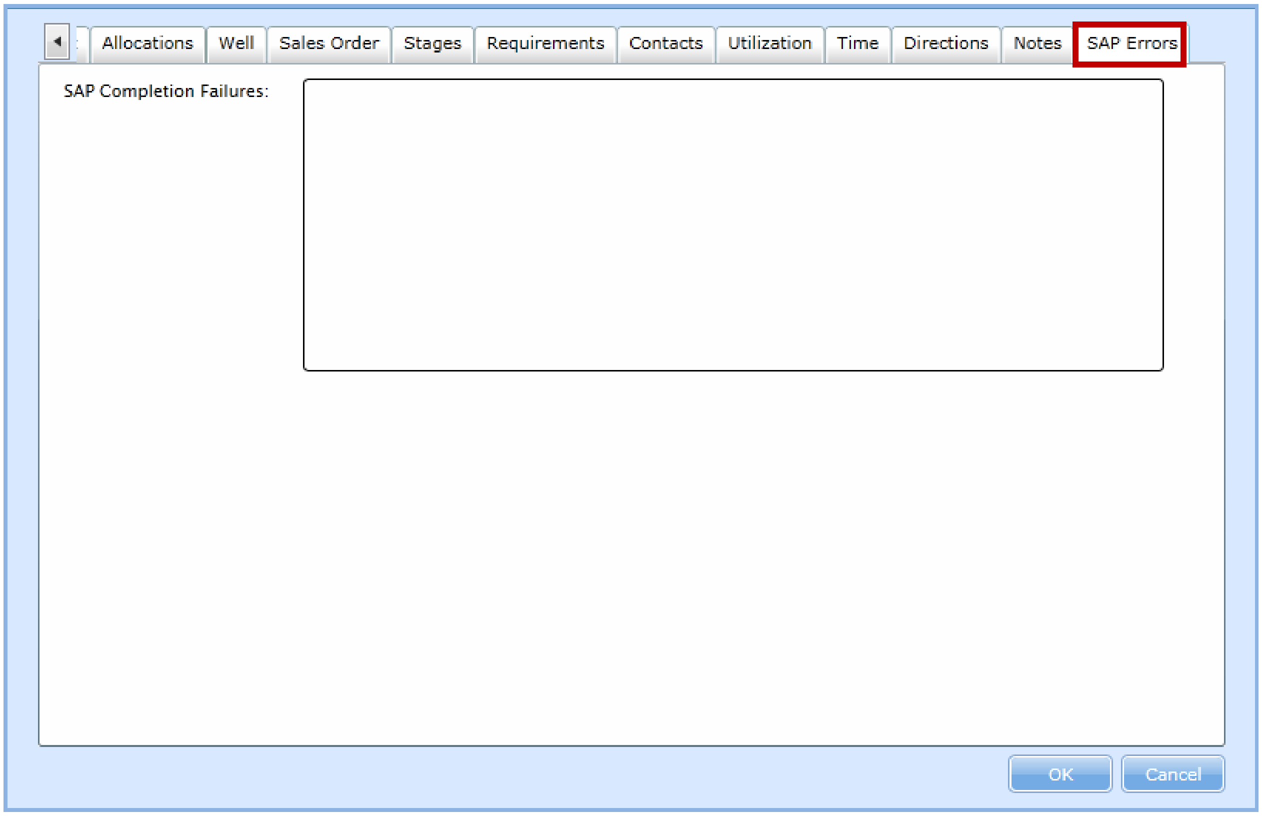
- **Site Latitude**: Default latitude information of the job site. This is based on the **Ship To** information.
- **Site Longitude**: Default longitude information of the job site. This is based on the **Ship To** information.
- **Site Directions & Restrictions**: Used to enter the directions to and restrictions for the site
- **Direction Corrections**: Generally, this field is populated from corrections sent by the Mobile Lead User– road closures, etc.

13. Notes Tab



- **Notes**: Used to enter any job-related notes. This information goes to the Mobile.

14. SAP Errors



- **SAP Completion Errors**: In the event that **Partial Post Actuals** fails, error descriptions are passed to this field from SAP.

Note: See QRC titled: **Resolving Resource Utilization Errors** for step instructions on how to resolve SAP specific errors.

Edit Job Form - DBS

The **Edit Job** form holds all the relevant properties for a job. Information concerning the job may be edited from the **Job** list in **Scheduling** view, an **Assigned** job on the **Resource Gantt**, or the **Job Builder** view.

NOTES:

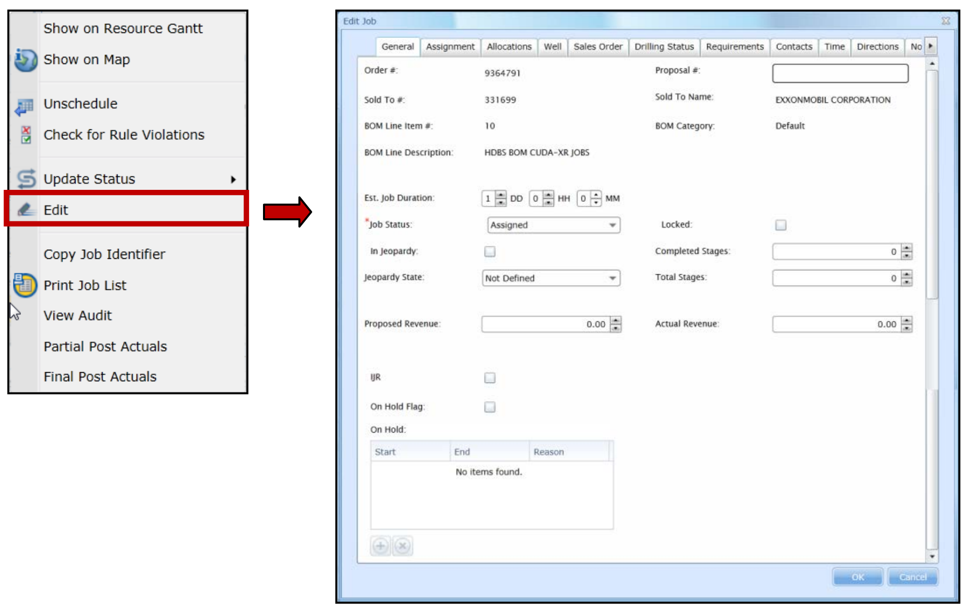
5. The **Assignment** tab only appears on the form when the job has been scheduled and in the **Scheduling** view.
6. Your PSL may not use all of the fields that are currently displayed in this document.

To view/edit the **Edit Job** form:

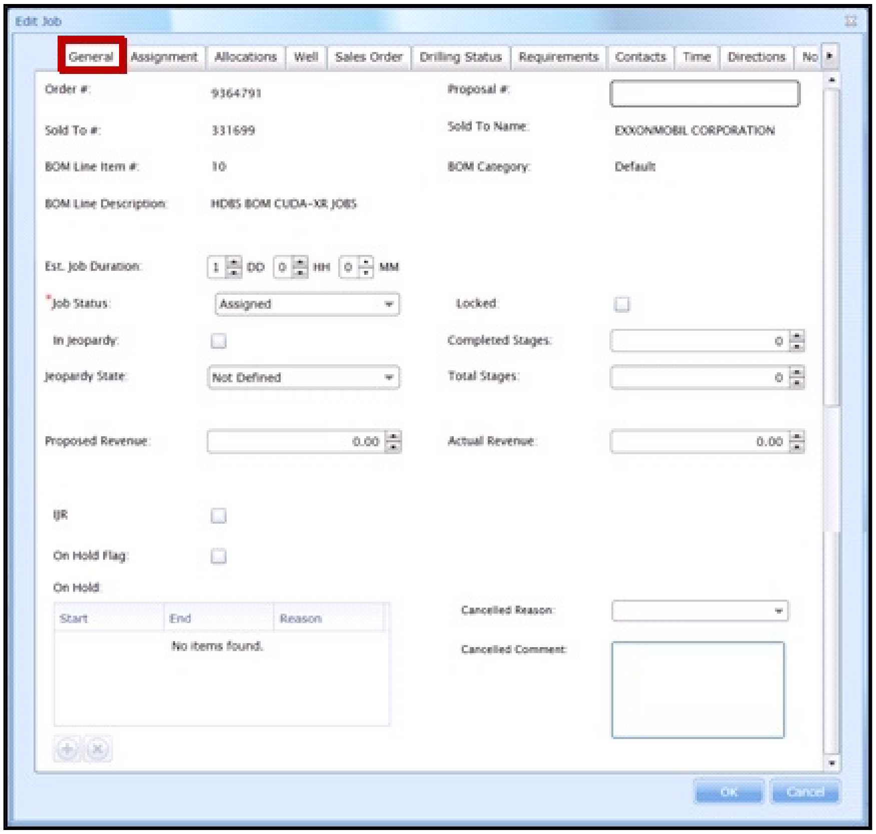
7. Right-click on the required job (from Job List/Gantt/Job Builder view). A list of options displays.

8. Select the **Edit** option. The **Edit Job** form displays

NOTE: You can also double-click any job to display the **Edit Job** form.



1. General Tab



- **Order #**: Displays the sales order number of the job
- **Proposal #**: Used to enter the proposal number
- **Sold To #**: Displays the customer number associated with the job
- **Sold to Name**: Displays the customer name associated with the job
- **BOM Line Item #**: Displays Bill of Materials line item number for the job
- **BOM Category**: Displays the grouping of services and materials that will be provided for a job
- **BOM Line Description**: Displays the short Bill of Materials line description for the job
- **Est. Job Duration**: By default, this field is set at a day but can be manually changed. The field is populated with the estimated duration of the job, gate-to-gate.
- **Job Status**: Displays the current status of the job

  NOTE: In most cases, after the Scheduler updates the status to **Informed**, subsequent statuses of the job are generally updated from **Job Details** (the ClickSchedule mobile application). However, if necessary, the job status can also be updated in the **Edit Job** form.

- **Locked**: Check this box if the job needs to be locked. It prevents the job from being assigned to another crew. This makes the **Locked Comment** field visible. When checked, is visible in the Locked column of Job List.

- **Locked Comment:** Used to enter the reason in this text field for locking the job. This is a required field if the **Locked** checkbox is selected.

- **In Jeopardy**: Check this box if the job is **In Jeopardy Jeopardy State:** Used to select the jeopardy reason from the dropdown

  NOTE: The **Jeopardy** checkbox and **In Jeopardy** reason may be auto-set due to business rules/policies that have not been met.

- **Completed Stage**: May be used to enter the current stage value for the job

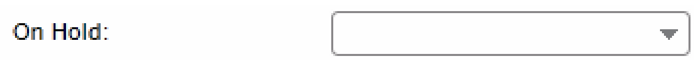
- **Total Stages**: Used to enter the total required stages of a job

- **Proposed Revenue**: Used to enter proposed job revenue. It is populated from the net value of the order but can be manually changed.

- **Actual Revenue**: Used to enter actual job revenue

- **IJR**: The **Irregular Job Report** checkbox is meant to be checked when an IJR has been created for this job and indicates that the job had unanticipated complications or problems.

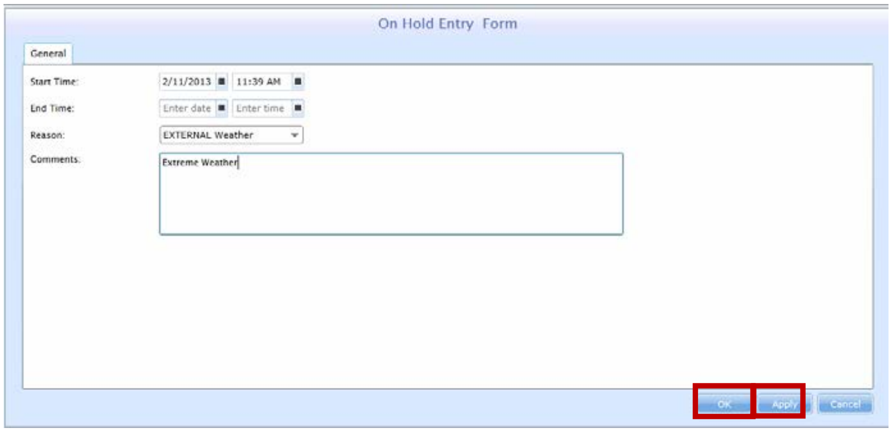
- **On Hold:** Use the drop down menu to select yes/no to indicate if the job is On Hold.



- The three columns that display on the **On Hold** table are:
  - **Start**: Select the time when the hold period starts.
  - **End**: Select the time when the hold period ends.
  - **Reason**: Select the **On Hold** reason for the job.

Click button to add a new row to the **Hold Time** table. k button to delete a selected **Hold Time** record

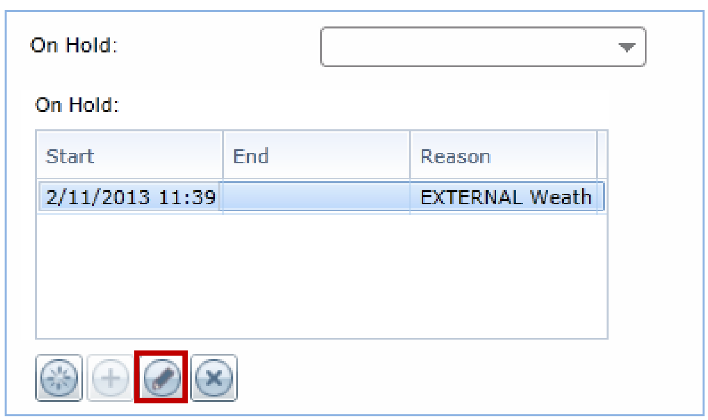
NOTE: To create a new **On Hold** record you need to be in the **Job Builder View**, but you can delete **On Hold** records from **Job Builder** and **Scheduling** view table.



- **Start Time:** Used to select the date and time when the hold period starts
- **End Time:** Used to select the date and time when the hold period ends
- **Reason**: Used to select the **On Hold** reason for the job
- **Comments**: Free text field to describe the **On Hold** reason details

Note: Click on Apply button and then the OK button. The entry appears in the **On Hold** table.

Note: The On Hold radio button displays on the line item for the Sales Order and on the **Job List** and the **Resource Gantt**.



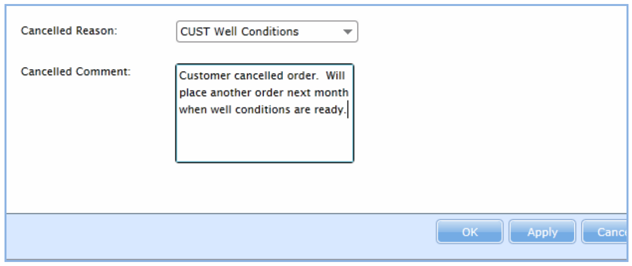
Note: To complete the **On Hold** table, click the line item to be completed, click , enter the **End Time** fields, click Apply button, click OK button. The table is now updated and the Job is no longer **On Hold.**

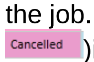
Note: Click to delete a selected **Hold Time** record.

NOTE: All cancelled fields are only visible when you cancel a job.

- **Cancelled Reason**: Used to select the reason for cancelling the job. This is a required field if the **Cancelled** checkbox is selected.

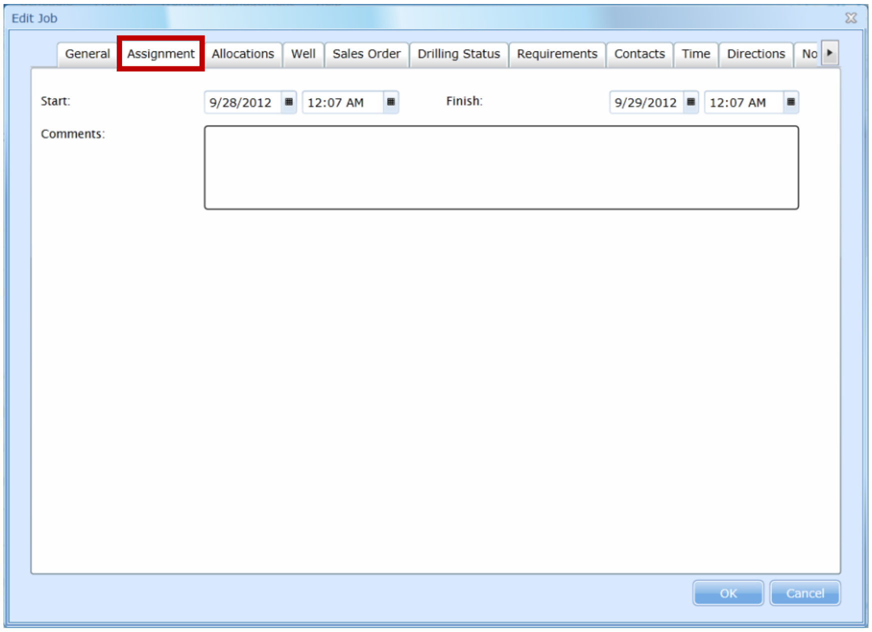
- **Cancelled Comment**: Free form text used to provide additional information for the job cancellation



Note: Click Apply and a pop-up message appear. Click **Yes** to cancel the job. Click the **OK** button and the job status will change to **Cancelled** (

)in the **Job Builder** view and on the Job List in the **Scheduling** view.

2. Assignment Tab



NOTE: Assignment tab is only visible in the **Scheduling View** once the job has been **Assigned**.

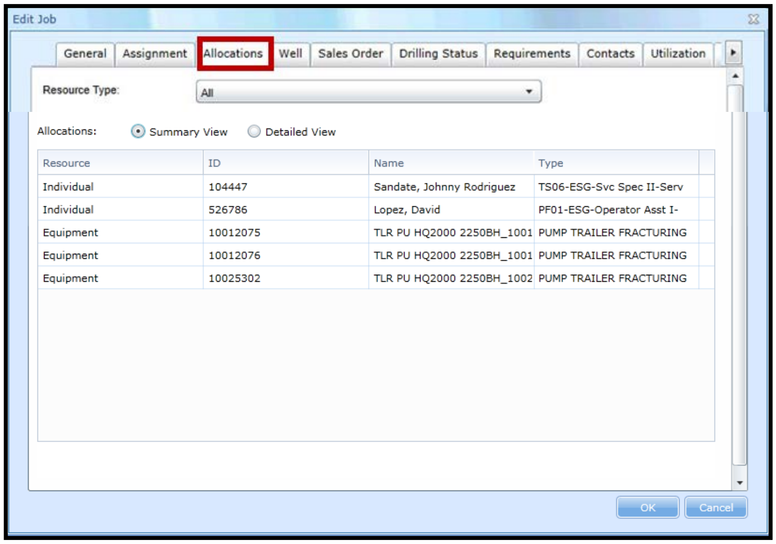
- **Start**: Displays the intended start date and time of the job (gate to gate). Populates when the job is dragged to the Gantt, but the field may be edited

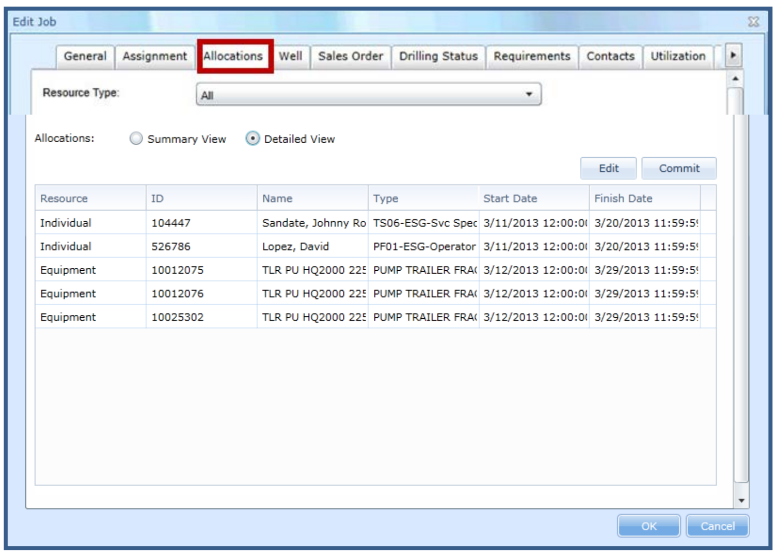
- **Finish**: Displays the intended finish date and time of the job (gate to gate). Populates when the job is dragged to the Gantt, but the field may be edited

  NOTE: The **Start Date** and **Time** is set when the job is dragged to the **Resource Gantt** chart. After that, the start time can be edited. The finish date is adjusted in the mobile.

- **Comments**: Used to enter any comments related to the job

3. Allocations Tab





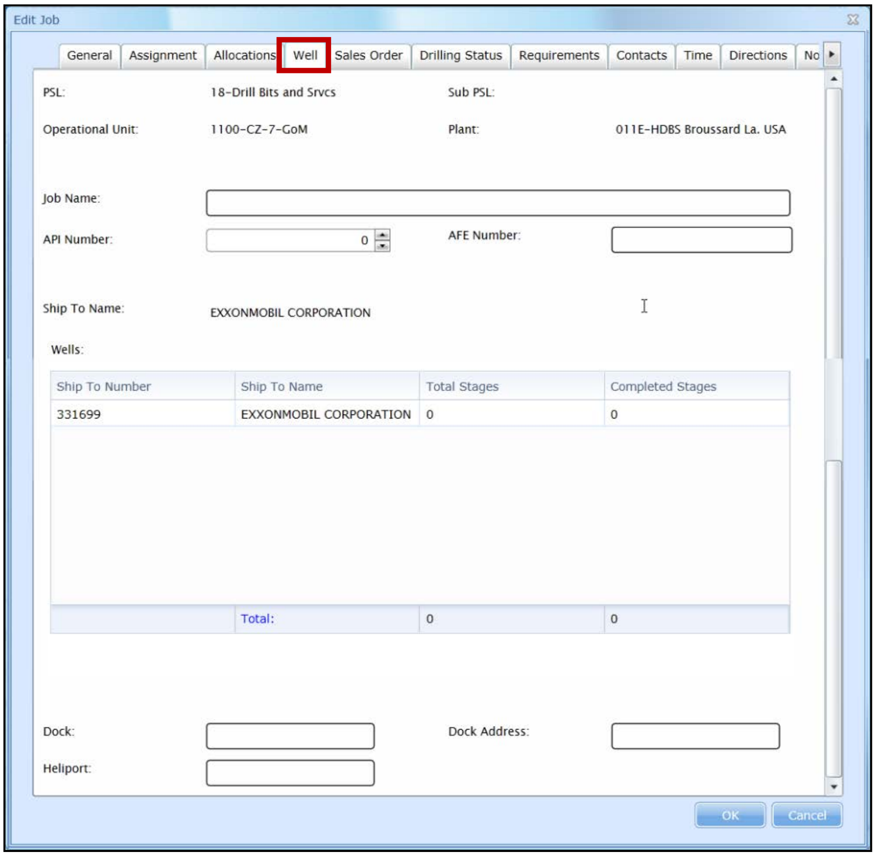
- **Resource Type**: Used to select the type of resource allocated to the job. The resources are then displayed in the **Allocations** table.

- **Allocations**: Displays the list of resources allocated to the job according to the selected value in the **Resource Type** drop-down.

  - **Summary View** : Summary list of allocations
  - **Detailed View**: Detailed list of allocations and allocation times
  - **Resource**: Displays the type of resource, for example, Individual, Equipment
  - **ID**: Displays the resource unique identifier (SAP ID#)
  - **Name**: Displays the name of the resource

- **Type**: Displays the title of the resource
- **Start Date:** Start date and time of allocation
- **Finish Date:** Finish date and time of allocation
- **Edit:** Button that allows user to edit the allocation for the resources
- **Commit:** Button that allows user to commit the edits made to allocations

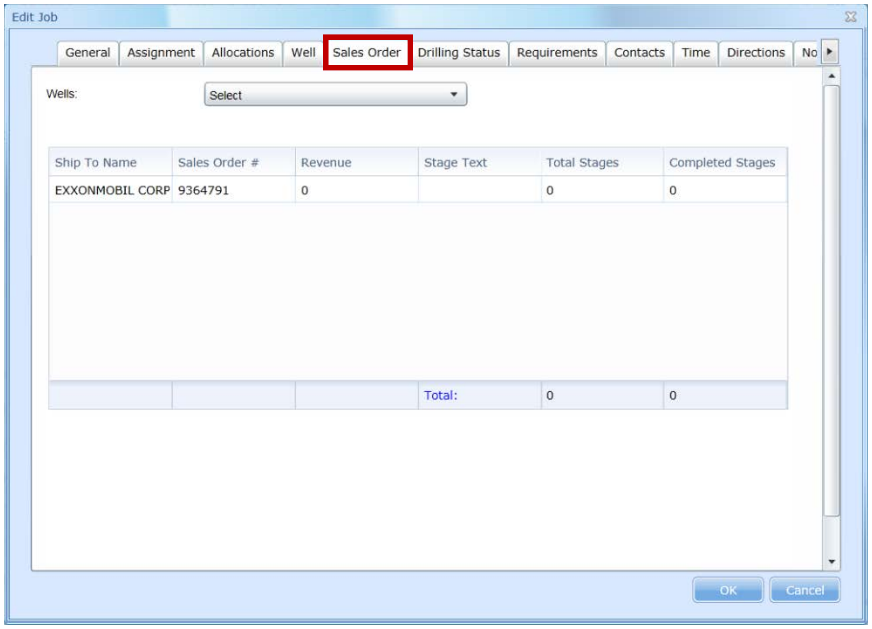
4. Well Tab



- **PSL**: Displays the Product Service Line
- **Sub PSL**: Displays a division within the primary Product Service Line
- **Operational Unit**: Displays the name of the operational unit of the job
- **Plant**: Displays the physical location to which the job is assigned
- **Job Name**: Used to enter more information pertaining to Job or Well. By default, the ship to name is entered, which consists of the customer name, well name, and number.
- **API Number**: A unique, numeric identifier assigned to each well by the American Petroleum Institute may be entered in this field.
- **AFE Number**: Used to enter the Authorization For Expenditures number of the job in this field
- **Ship To Name**: Displays the customer name, well name, and number

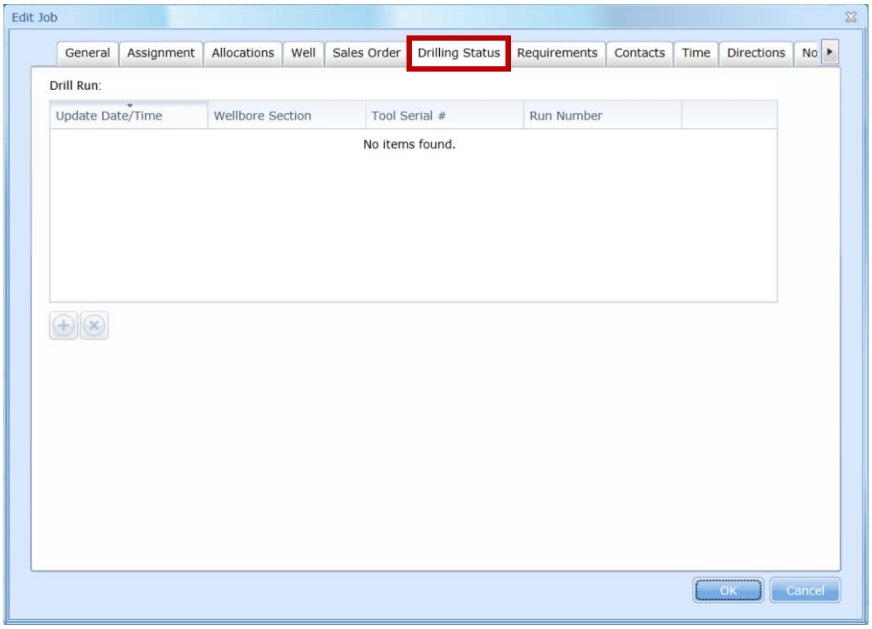
- **Wells Table**: Displays well details
  - **Ship To Number**: Displays SAP generated **Ship To** number
    - **Ship To Name**: Displays the name of the customer operating the well
    - **Total Stages**: Displays the number of stages the job comprises.
    - **Completed Stages**: Displays the number of stages completed for the job.
    - **Total:** Counts number of **Total Stages** and number of **Completed Stages** populated from the **Sales Order** tab.
- **Dock**: Used to enter dock information
- **Dock Address**: Used to enter the dock address
- **Heliport**: Used to enter heliport information

5. Sales Order Tab



- **Wells**: Used to select the sales order/well. It will display the different ship to's.
- **Sales Order Table**: Displays a list of customer or well details for the selected value of the **Wells** dropdown
  - **Ship To Name**: Displays the the customer name, well name, and number
  - **Sales Order**: Displays the sales order number for the job
  - **Revenue**: Displays the proposed revenue the job will generate
  - **Stage Text**: Contains text concerning the stages of the job
  - **Total Stages**: Displays the number of stages for the job
  - **Completed Stages**: Displays the number of completed stages for the job
  - **Total**: Counts the number of **Total Stages** and the number of **Completed Stages**

6. Drill Status Tab



- **Drill Run**: This table displays the following **Drill Run** metrics:
  - **UpDate Date/Time**: Displays the start time and date of the Drill Run
  - **Wellbore Section**: Displays the section of the wellbore
  - **Tool Serial #**: Displays the serial number of tools used for the **Drill Run**
  - **Run Number**: Displays the **Drill Run** number

Click to add a new row to the **Drill Run** table. Click to delete a selected **Drill Run** record.

NOTE: To create a new **Drill Run** record, you need to be in the **Job Builder View**, but you can delete **Drill Run** records from the **Job Builder** and **Scheduling** views.

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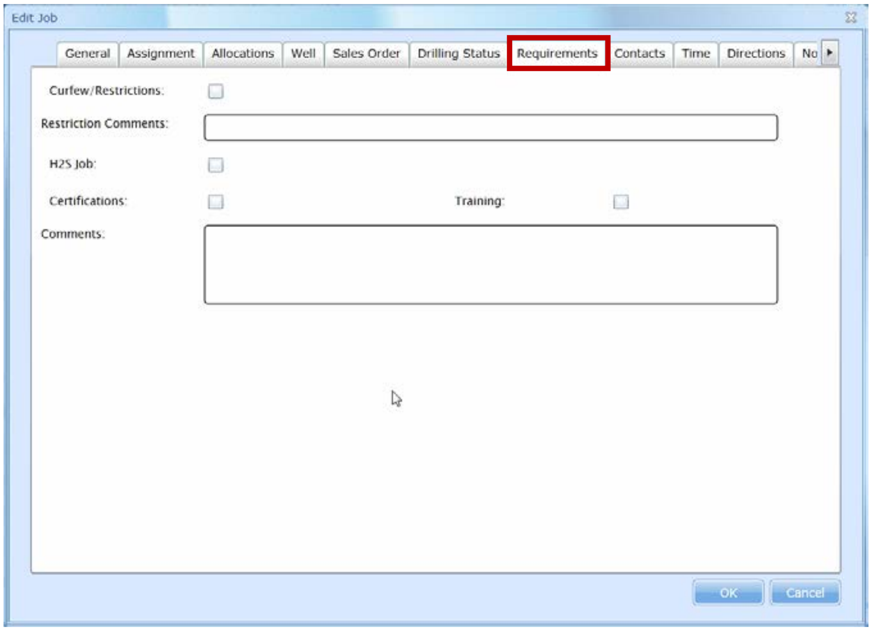
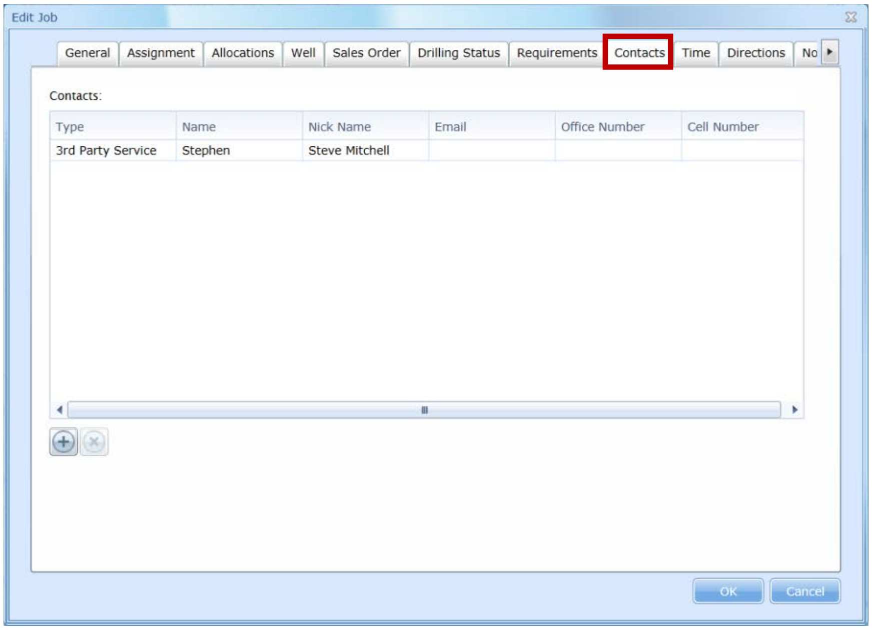
7. Requirements Tab



- **Curfew/Restriction**: Check this box if there is a curfew or restrictions.
- **Restriction Comments**: Field appears when **Curfew/Restriction** is checked. Used to add comments in the text box regarding restrictions
- **H2S Job**: Check this box if the job is a **H2S** job.
- **Certifications**: Mark this checkbox if any certificates are required for the job.
- **Training**: Mark this checkbox if any training is required for this job.
- **Comments**: Used to enter any comments regarding certifications, training or any other special skill sets

8. Contacts Tab

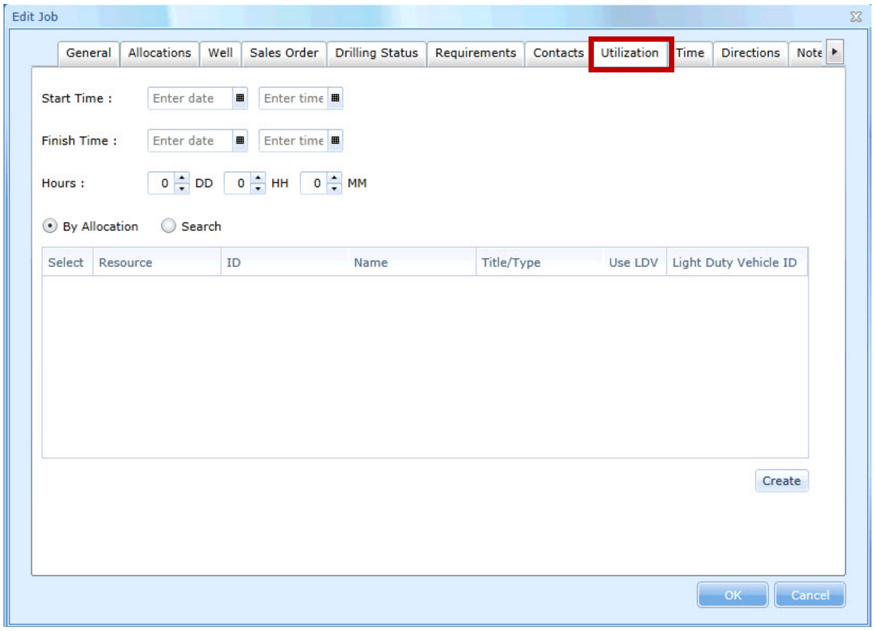


- **Contacts**: Displays a list of contacts associated with the job
  - **Type**: Displays the contact type
  - **Name**: Displays the first name of the contact
  - **Nick Name**: Displays a nickname for the contact
  - **Email**: Displays the email address for the contact
  - **Office Number**: Displays the office telephone number for the contact
  - **Cell Number**: Displays the mobile telephone number for the contact
- **Add Contacts**: To insert a contact details row in the **Contacts** table, click . The **Contacts Search** form is displayed. Search for, and then select, the desired contacts by marking the appropriate checkboxes in the form. When completed, click the **OK** button.

  NOTE: New **Contact** records are created in the **Job Builder** view. Click to create a new contact record.

- **Delete Contacts**: Click button to delete a contact from the **Contacts** table. When completed, click the **OK** button.

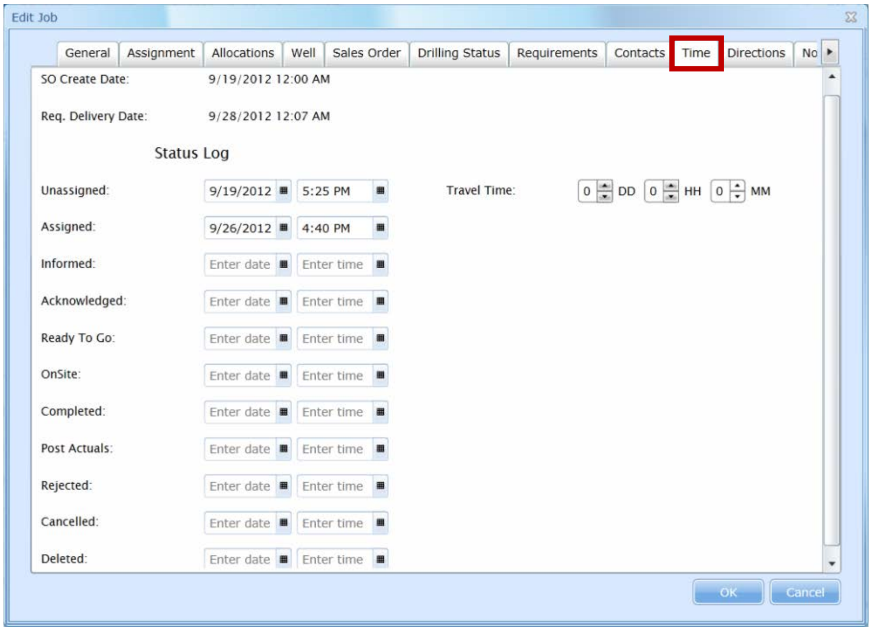
9. Utilization Tab



This tab is used to create Halliburton Resource Utilization records, which can be viewed in the **Resource Utilization View**.

NOTE: See **Create Utilization Records** Quick Reference Card for how to create utilization records.

10. Time Tab

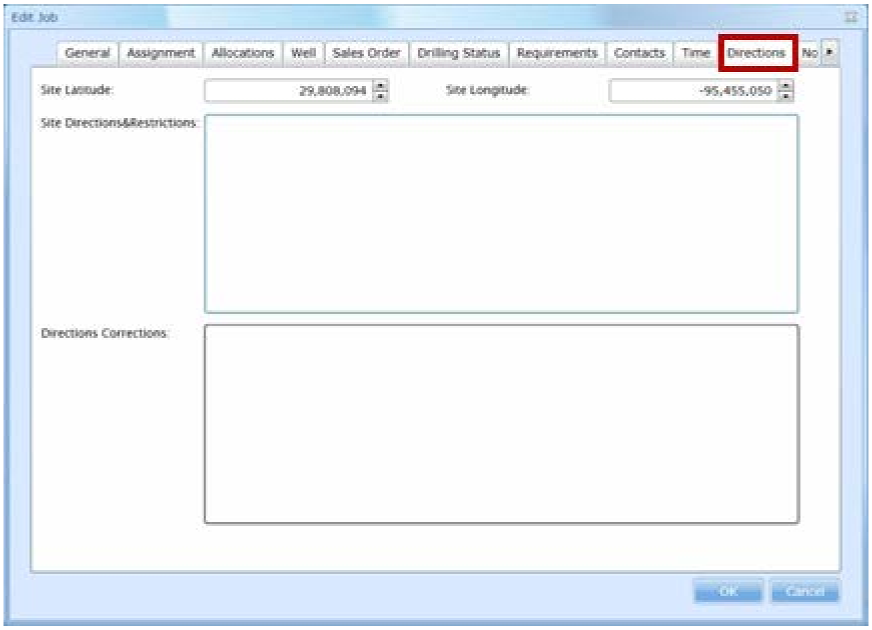


- **SO Create Date**: Displays the sales order creation date
- **Req. Delivery Date**: Displays the required delivery date and time of the job. This information is populated from the SAP sales order.
- **Status Log**: Displays the **Date** and **Time** information the job acquired a status update throughout the lifecycle of the job. It is a timestamp when statuses are changed but can be manually edited.
  - **Unassigned**: The job has passed from SAP to ClickSchedule, but the Scheduler has not yet assigned the job.
  - **Assigned**: The Scheduler has assigned the job by dragging the job to the Gantt.
  - **Informed**: The job has been sent to **Job Details**.
  - **Acknowledged**: The job has been acknowledged.
  - **Ready To Go**: Job Preparations are complete and crew is ready to leave the yard.
  - **On Site**: Crew has acknowledged the resources are on site.
  - **Completed**: Crew has indicated that the job has been completed.
  - **Post Actuals**: Partial and final post actuals have been performed and SAP has confirmed records posted and C status in SAP.
  - **Rejected**: In the event that a **Sales Order** is rejected in SAP, the time stamp of the rejection is passed to this field.
  - **Cancelled**: Used to enter the date and time for a job that has been cancelled. Cancelling a job in ClickSchedule doe not update any status in SAP.

- **Deleted**: In the event that a **Sales Order** is deleted rather than rejected in SAP, the time stamp of the deletion is passed to this field

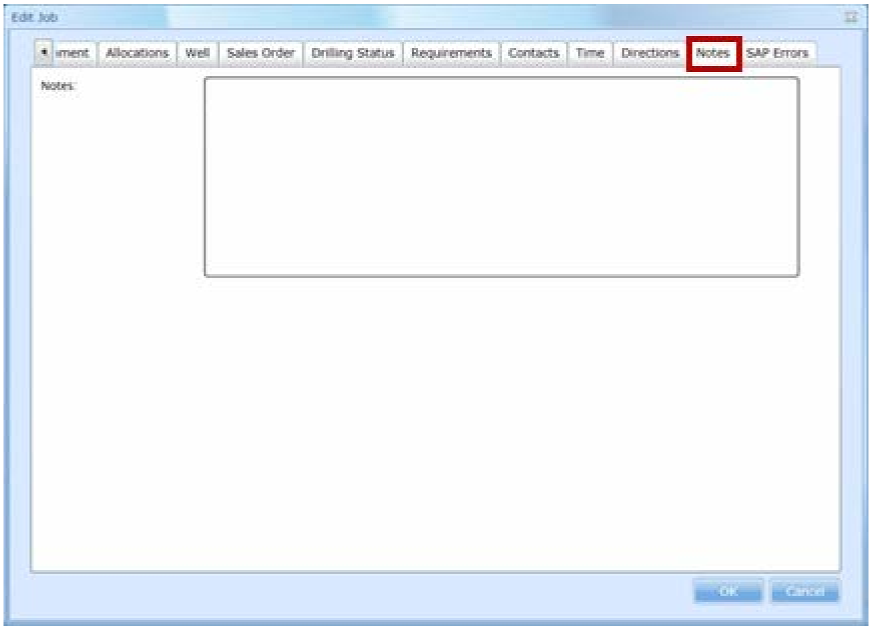
- **Call Out**: Mark this checkbox if a job is spontaneous or a customer calls with a job.
- **Customer Call Date**: Used to enter the date the customer was called
- **Confirmation Date**: Used to enter the confirmation date
- **Will Call** / **On Loc Time**: Used to enter the date by which **Will Call** is due or time crew needs to be on location
- **Assignment Start**: Displays the intended start date and time of the job. The field may be edited.

11. Directions Tab



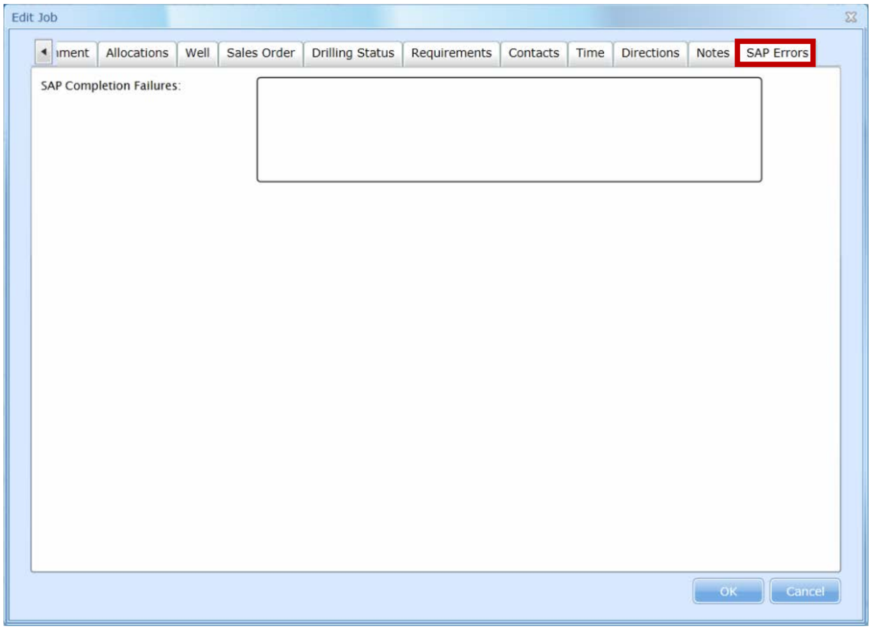
- **Site Latitude**: Default latitude information of the job site. This is based on the **Ship To** information.
- **Site Longitude**: Default longitude information of the job site. This is based on the **Ship To** information.
- **Site Directions & Restrictions**: Used to enter the directions to and restrictions for the site in the text box
- **Direction Corrections**: Generally, this field is populated from corrections sent by the Mobile Lead User– road closures, etc.

12. Notes Tab



- **Notes**: Used to enter any job-related notes. This information is passed to **Job Details**.

13. SAP Errors Tab



- **SAP Completion Errors**: SAP errors display in this box in the event that **Partial Post Actuals** fails. The type of SAP errors will be described.

Edit Job Form - HCT

The **Edit Job** form holds all the relevant properties for a job. Information concerning the job may be edited from the **Job** list in the **Scheduling** view, an **Assigned** job on the **Resource Gantt**, or the **Job Builder** view.

NOTES:

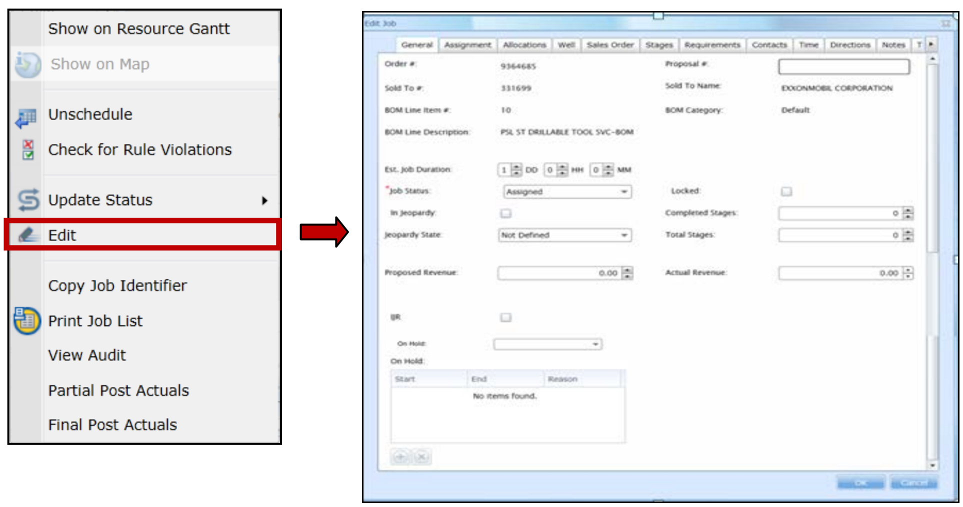
7. The **Assignment** tab only appears on the form when the job has been scheduled and in the **Scheduling** view.
8. Your PSL may not use all of the fields that are currently displayed in this document.

To view/edit the **Edit Job** form:

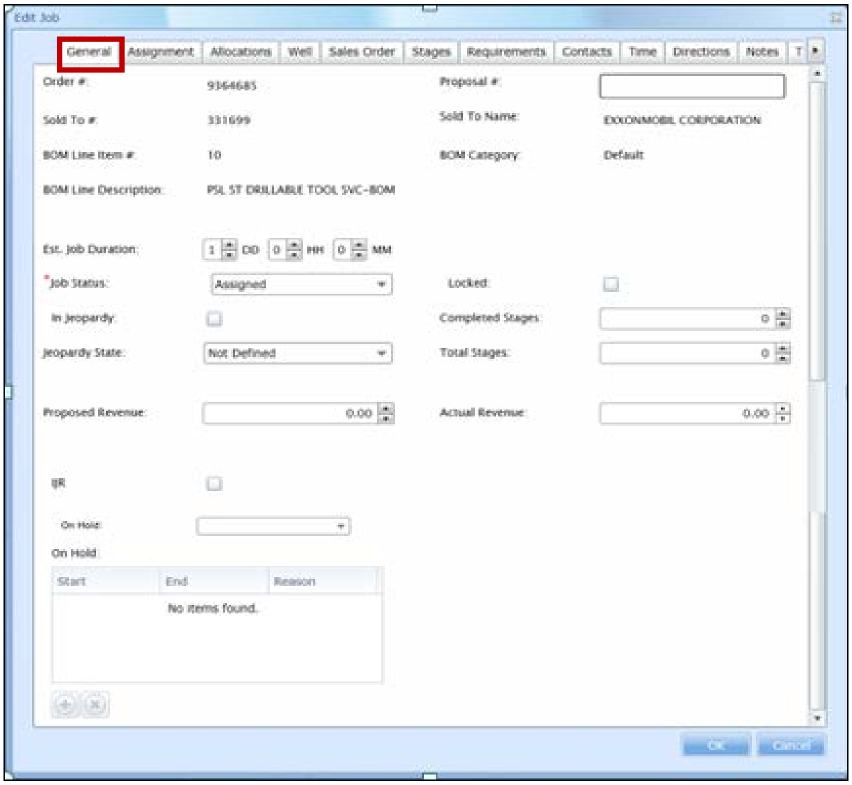
9. Right-click on the required job (from Job List/Gantt/Job Builder view). A list of options displays.

10. Select the **Edit** option. The **Edit Job** form displays

NOTE: You can also double-click any job to display the **Edit Job** form.



1. **General Tab**



- **Order #**: Displays the sales order number of the job.
- **Proposal #**: Used to enter the proposal number.
- **Sold To #**: Displays the customer number associated with the job.
- **Sold to Name**: Displays the customer name associated with the job.
- **BOM Line Item #**: Displays Bill of Materials line item number for the job.
- **BOM Category**: Displays the grouping of services and materials that will be provided for a job.
- **BOM Line Description**: Displays the short Bill of Materials line description for the job.
- **Est. Job Duration**: By default, this field is set in days, but can be manually changed. The field is populated with the estimated duration of the job, gate-to-gate.
- **Job Status**: Displays the current status of the job.

NOTE: In most cases, after the Scheduler updates the status to **Informed**, subsequent statuses of the job are generally updated from **Job Details** (the ClickSchedule mobile application). However, if necessary, the job status can also be updated in the **Edit Job** form.

- **Locked**: Check this box if the job needs to be locked. It prevents the job from being assigned to another crew. This makes the **Locked Comment** field visible. When checked, the is visible in the **Locked** column of the Job List.

- **Locked Comment:** Used to enter the reason in this text field for locking the job. This is a required field if the **Locked** checkbox is selected.

- **In Jeopardy**: Check this box if the job is **In Jeopardy**. When checked, this turns on the **In Jeopardy** indicator .

- **Jeopardy State:** Used to select the jeopardy reason from the dropdown menu.

  NOTE: The **Jeopardy** checkbox and **In Jeopardy** reason may be auto-set due to business rules/policies that have not been met.

- **Completed Stages**: May be used to enter the current stage value for the job.

- **Total Stages**: Used to enter the total required stages of a job.

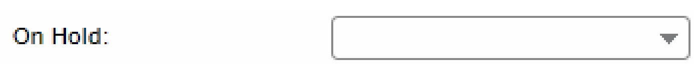
- **Proposed Revenue**: Used to enter proposed job revenue. It is populated from the net value of the order, but can be manually changed.

- **Actual Revenue**: Used to enter actual job revenue.

- **IJR**: The **Irregular Job Report** checkbox is meant to be checked when an IJR has been created for this job and indicates that job had unanticipated complications or problems.

- **On Hold**: To create a new **On Hold** record you need to be in the **Job Builder View**, but you can delete **On Hold** records from **Job Builder** and **Scheduling** view

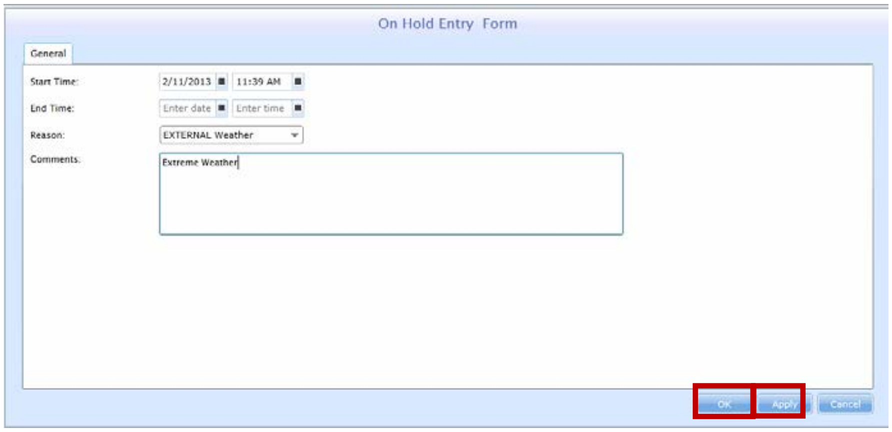
- **On Hold:** Use the drop down menu to select the appropriate entry.



- The three columns that display on the **On Hold** table are:
  - **Start**: Select the time when the hold period starts.
  - **End**: Select the time when the hold period ends.
  - **Reason**: Select the **On Hold** reason for the job.

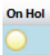
Click button to add a new row to the **Hold Time** table. Click to delete a selected **Hold Time** record.

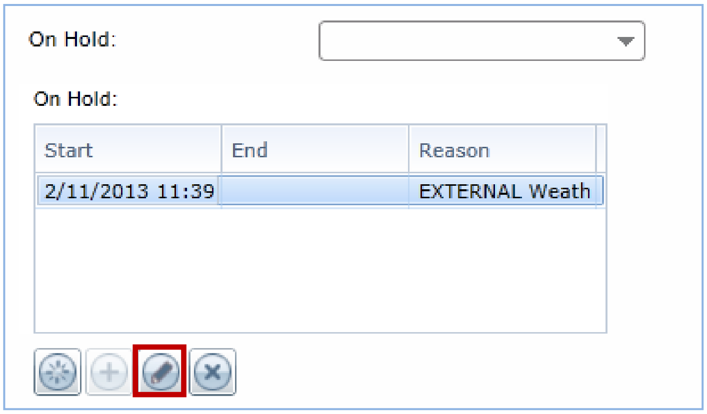
NOTE: To create a new **On Hold** record you need to be in the **Job Builder View**, but you can delete **On Hold** records from **Job Builder** and **Scheduling** view table.



- **Start Time:** Used to select the date and time when the hold period starts
- **End Time:** Used to select the date and time when the hold period ends
- **Reason**: Used to select the **On Hold** reason for the job
- **Comments**: Free text field to describe the **On Hold** reason details

Note: Click the **Apply** button and then the **OK** button. The entry appears in the **On Hold** table.

Note: The **On Hold**  radio button displays on the line item for the Sales Order and on the **Job List** and the **Resource Gantt**.



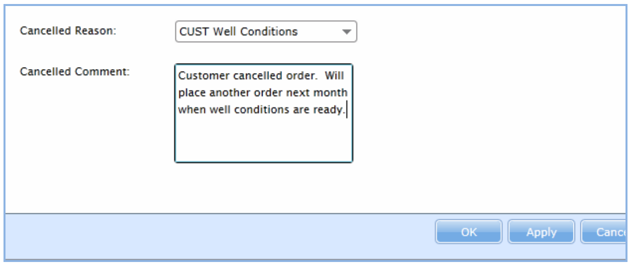
Note: To complete the **On Hold** table, click on the line item to be completed, click , enter the **End Time** fields, click the **Apply** button, and then click the **OK** button. The table is now updated and the Job is no longer **On Hold.**

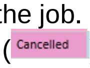
Note: Click  to delete a selected **Hold Time** record.

NOTE: All cancelled fields are only visible when you cancel a job.

- **Cancelled Reason**: Used to select the reason for cancelling the job. This is a required field if the **Cancelled** checkbox is selected.

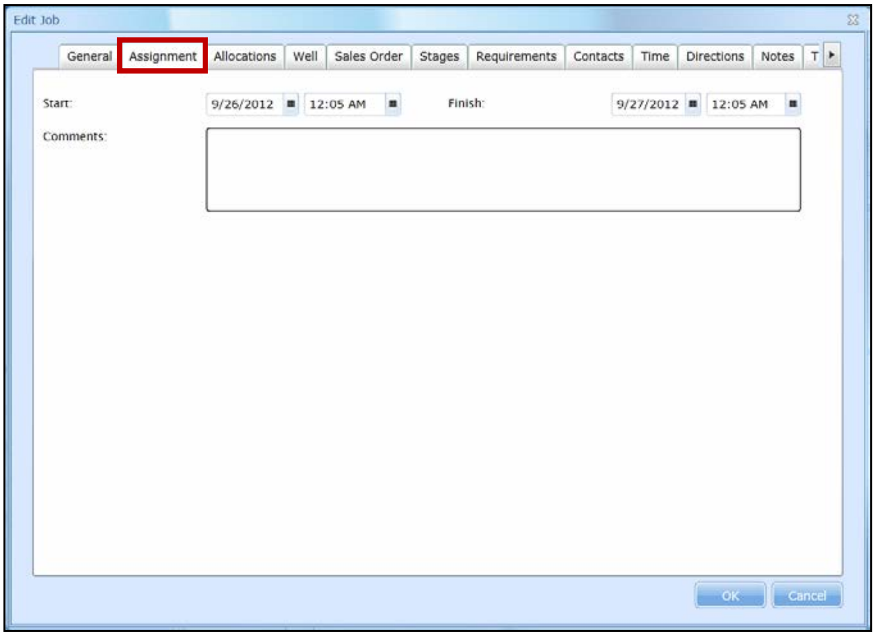
- **Cancelled Comment**: Free form text used to provide additional information for the job cancellation



Note: Click the **Apply** button and a pop-up message displays. Click the **Yes** button to cancel the job. Click the **OK** button and the job status will change to **Cancelled** (

) in the **Job Builder** view and on the Job List in the **Scheduling** view.

2. Assignment Tab



NOTE: Assignment tab is only visible in the **Scheduling View** once the job has been moved to the **Assigned** status.

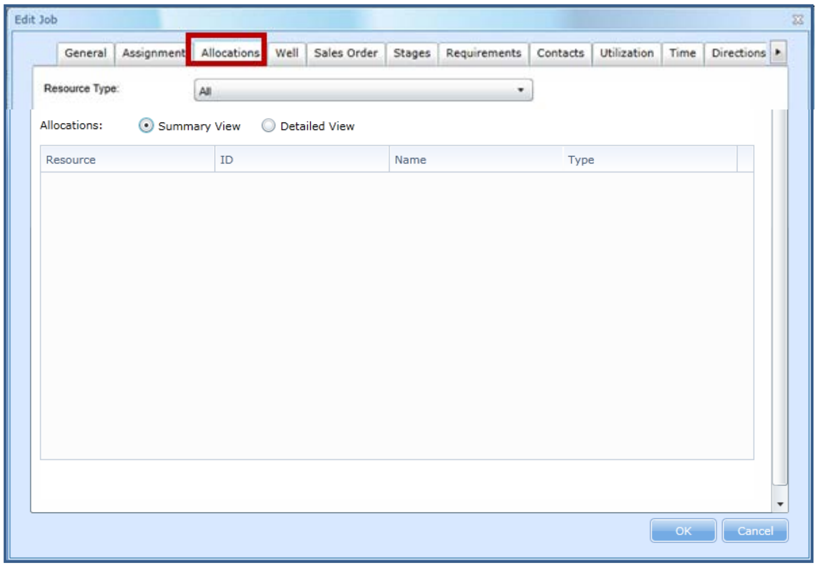
- **Start**: Displays the intended start date and time of the job (gate to gate). Populates when the job is dragged to the Gantt, but the field may be edited.

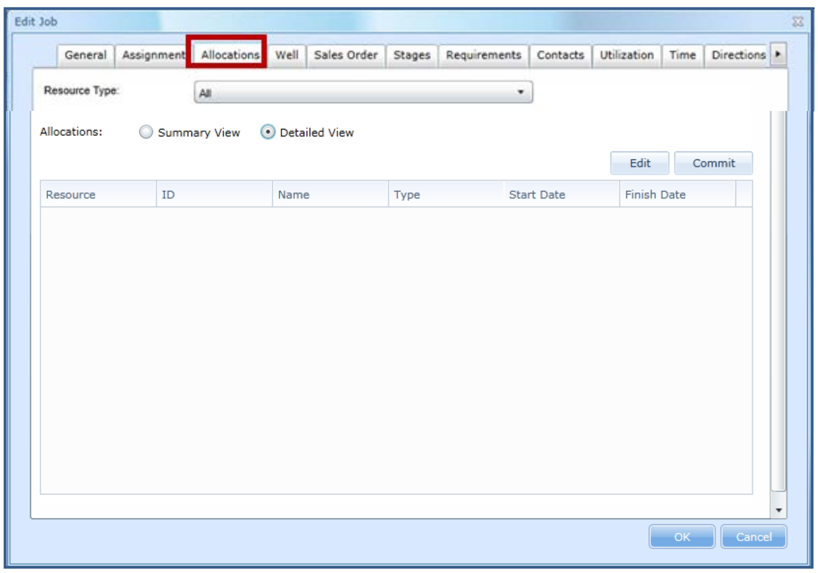
- **Finish**: Displays the intended finish date and time of the job (gate to gate). Populates when the job is dragged to the Gantt, but the field may be edited.

  NOTE: The **Start Date** and **Time** is set when the job is dragged on to the **Resource Gantt** chart. After that, the start time can be edited. The finish date can be adjusted in **Job Details**.

- **Comments**: Used to enter any comments related to the job.

3. Allocations Tab





- **Resource Type**: Used to select the type of resource allocated to the job. The resources are then displayed in the **Allocations** table.

- **Allocations**: Displays the list of resources allocated to the job according to the selected value in the **Resource Type** drop-down.

  - **Summary View** : Summary list of allocations

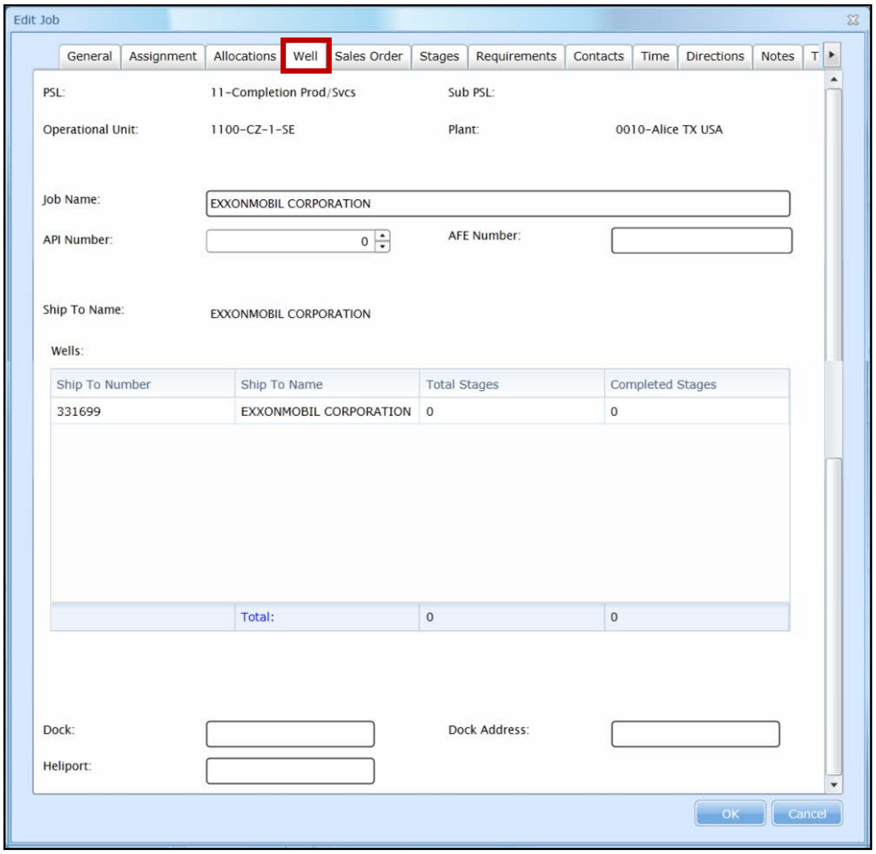
  - **Detailed View**: Detailed list of allocations and allocation times

  - **Resource**: Displays the type of resource, for example, Individual, Equipment

  - **ID**: Displays the resource unique identifier (SAP ID#)

- **Name**: Displays the name of the resource
- **Type**: Displays the title of the resource
- **Start Date:** Start date and time of allocation
- **Finish Date:** Finish date and time of allocation
- **Edit:** Button that allows user to edit the allocation for the resources
- **Commit:** Button that allows user to commit the edits made to allocations

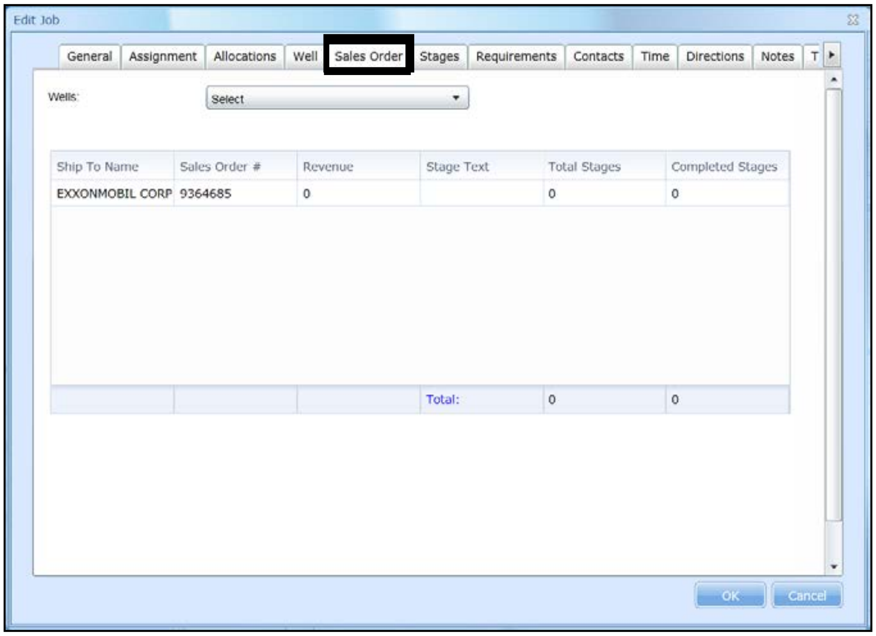
4. **Well Tab**



- **PSL**: Displays the Product Service Line.
- **Sub PSL**: Displays a division within the primary Product Service Line.
- **Operational Unit**: Displays the name of the operational unit of the job.
- **Plant**: Displays the physical location to which the job is assigned.
- **Job Name**: Used to enter more information pertaining to the Job or Well. By default the ship to name is entered, which consists of customer name, well name and number.
- **API Number**: A unique, numeric identifier assigned to each well by the American Petroleum Institute may be entered in this field.
- **AFE Number**: Used to enter the Authorization For Expenditures number of the job in this field.
- **Ship To Name**: Displays the customer name, well name and number.

- **Wells Table**: Displays well details
  - **Ship To Number**: Displays SAP generated **Ship To** number.
  - **Ship To Name**: Displays the name of the customer operating the well.
  - **Total Stages**: Displays the number of stages the job comprises.
  - **Completed Stages**: Displays the number of stages completed for the job.
  - **Total:** Counts number of **Total Stages** and number of **Completed Stages** populated from the **Sales Order** tab.
- **Dock**: Used to enter dock information.
- **Dock Address**: Used to enter the dock address.
- **Heliport**: Used to enter the heliport information.

5. **Sales Order Tab**

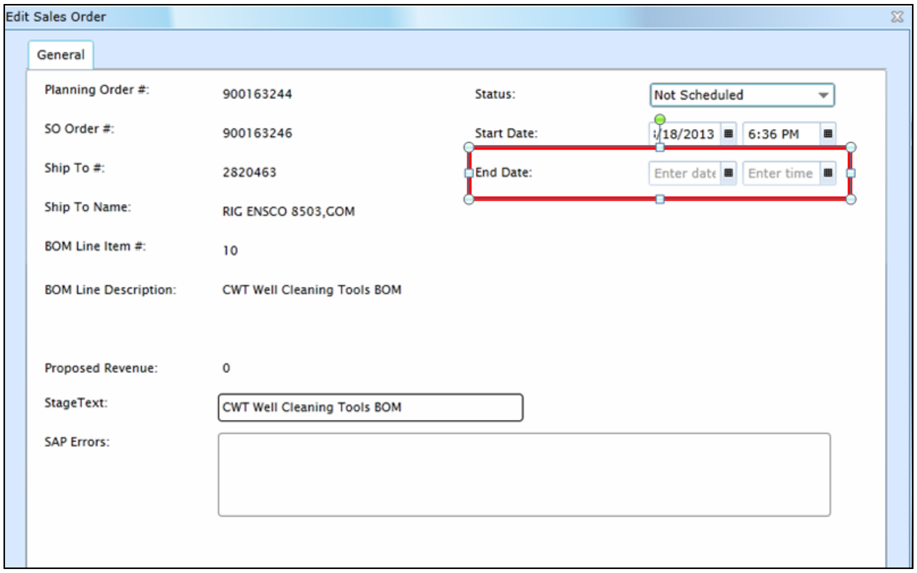


- **Wells**: Used to select the sales order/well. It will display the different Ship To's
- **Sales Order Table**: Displays a list of customer or well details for the selected value of determined by using the **Wells** dropdown menu.
  - **Ship To Name**: Displays the name of the customer, well name and number.
  - **Sales Order**: Displays the sales order number for the job.
  - **Revenue**: Displays the proposed revenue the job will generate.
  - **Stage Text**: Contains text concerning the stages of the job.
  - **Total Stages**: Displays the number of stages for the job.
  - **Completed Stages**: Displays the number of completed stages for the job.
  - **Total**: Counts number of **Total Stages** and the number of **Completed Stages**

NOTE: When using Planned Orders, Order Type ZBPO, and the ZOH Sales Order **does not** have any stages, it will be necessary to update the ZOH sales order with the "Sales Order End Date" manually. See **How to add end date for ZOH child QRC**.

Select the sales order without stages, double click on the line item that is highlighted and the **Edit Sales Order** form displays.

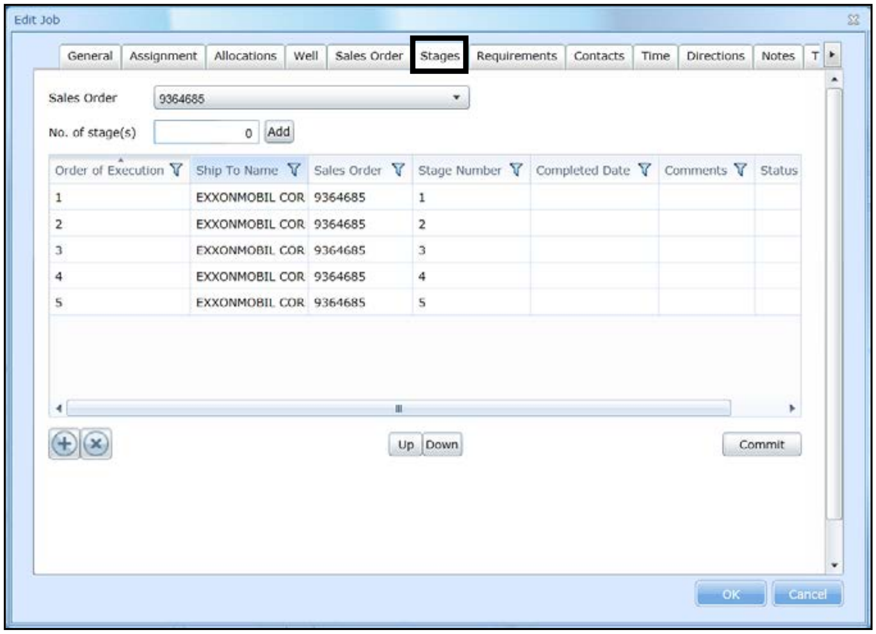
Ship To Name	Sales Order #	BOM Number	Revenue	Stage Text	Total Stages	Completed Stage
RIG ENSCO 850	900163245	000010	0	CWT Well Cleani	3	1
RIG ENSCO 850	900163246	000010	0	CWT Well Cleani	0	0



NOTE: End Date and **End Time** must be entered. If the ZOH (associated to the ZBPO sales order) has stages, the completed date and time for the last stage will populate the ZOH end date and time.

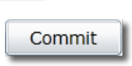
NOTE: If there are errors during the partial posting of the ZOH order, it will display in the **SAP Errors** field. Refer to the QRC's, **Resolve Resource Utilization** and **Resource Utilization View** for further details on how to resolve resource utilization errors.

6. Stages Tab

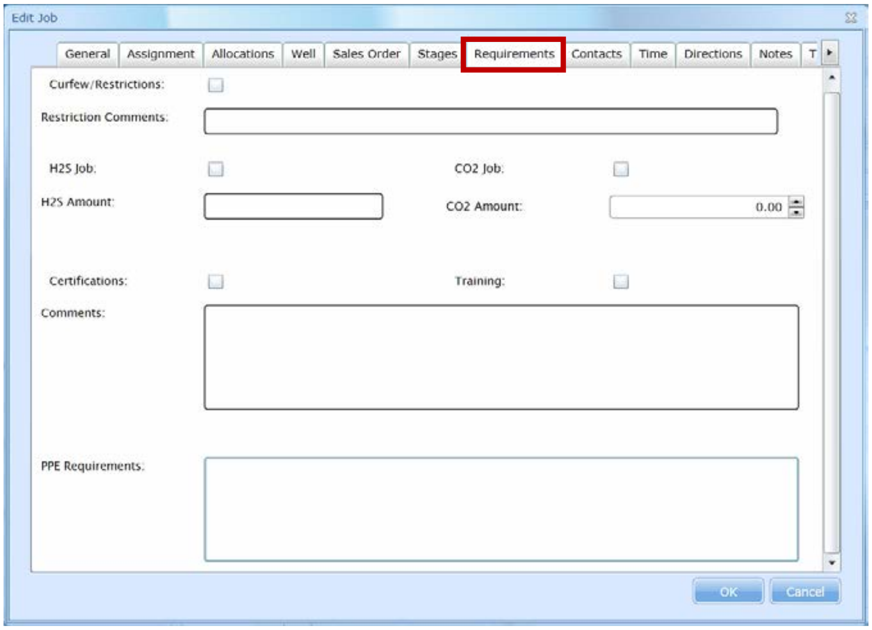


- **Sales Order**: From the dropdown, select the sales order to display the stage details in the **Stage** table.
- **No. of Stage(s)**: Used to enter the number of stages incorporated in the job
- **Add**: Click the  button to automatically calculate stages.
- **Stage Details Table**: Displays the details of the stages

  NOTE: Click  on any of the column headers to filter the column data.

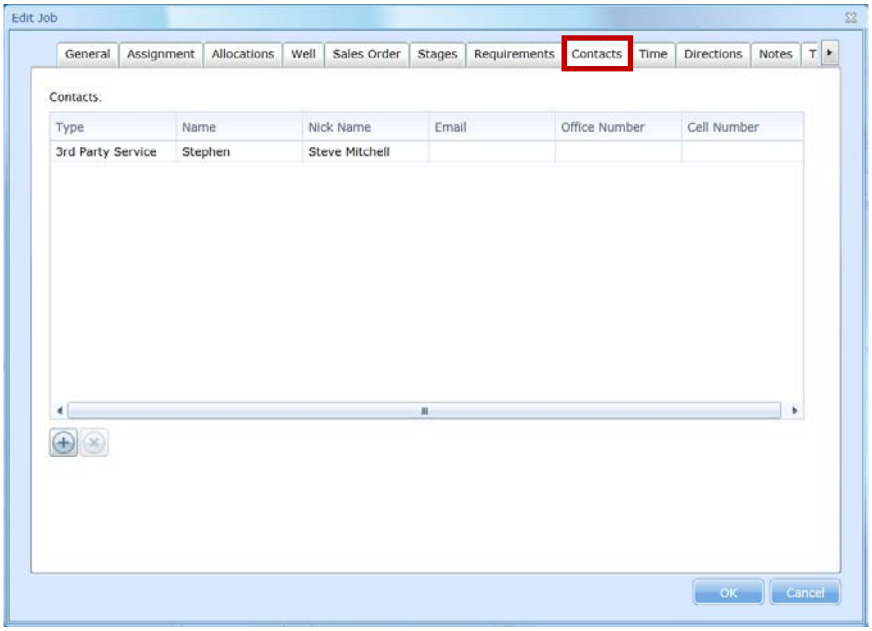
  - **Order of Execution**: Displays the execution order of the stages.
  - **Ship To Name**: Displays the combination of the customer and well name.
  - **Sales Order**: Displays the sales order number for the job.
  - **Stage Number**: Displays the number of the stage.
  - **Completed Date**: Displays the date the stage was completed.
  - **Comments**: Displays comments concerning the associated stage.
  - **Status**: Displays Completed or Skipped based on entry from mobile.
- **Add**: Click the  button to insert another row into the **Stages** table.
- **Delete**: Click the  button to remove the selected row in the **Stages** table.
- **Up**: Click the  button to move the selected row up in the **Stages** table.
- **Down**: Click the  button to move the selected row down in the **Stages** table.
- **Commit**: Click the  button to save the layout of the **Stages** table.

7. Requirements Tab



- **Curfew/Restriction**: Check this box if there is a curfew or restrictions.
- **Restriction Comments**: Field appears when **Curfew/Restriction** is checked. Used to add comments in the text box regarding restrictions.
- **H2S Job**: Check this box if the job is a **H2S** job.
- **CO2 Job**: Check this box if **CO2** is required for the job.
- **H2S Amount**: Used to enter the amount of **H2S**
- **CO2 Amount**: Used to enter the amount of **CO2**
- **Certifications**: Select this checkbox if any certificates are required for the job.
- **Training**: Select this checkbox if any training is required for this job.
- **Comments**: Used to enter any comments regarding certifications, training or any other special skill sets
- **PPE Requirements Comments**: Used to enter any comments regarding personal protection equipment in this text field.

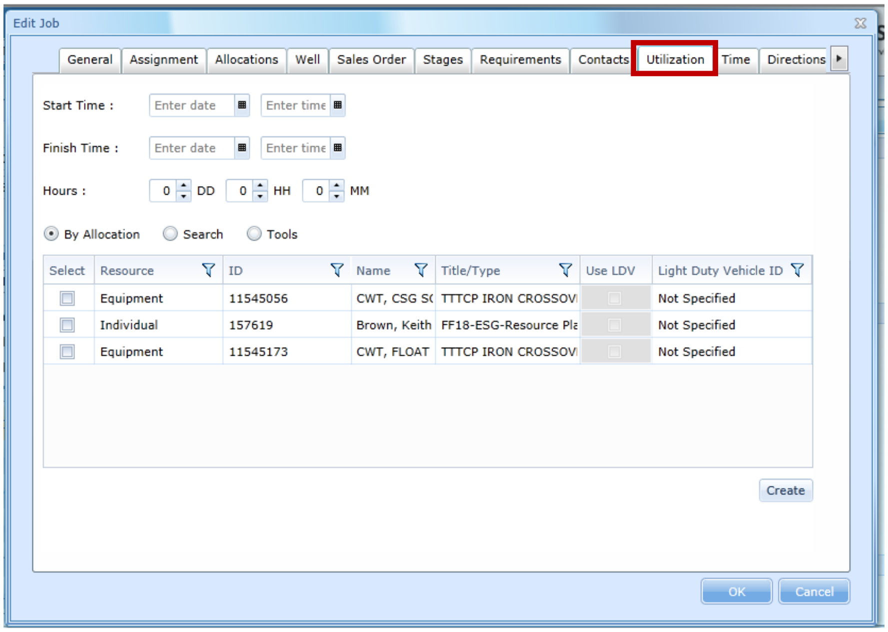
8. Contacts Tab



- **Contacts**: Displays a list of contacts associated with the job
  - **Type**: Displays the contact type
  - **Name**: Displays the first name of the contact
  - **Nick Name**: Displays a nick name for the contact
  - **Email**: Displays the email address for the contact
  - **Office Number**: Displays the office telephone number for the contact
  - **Cell Number**: Displays the mobile telephone number for the contact
- **Add Contacts**: To insert a contact details row in the **Contacts** table, click . The **Contacts Search** form is displayed. Search for, and then select the desired contacts by marking the appropriate checkboxes in the form. When completed, click the **OK** button.

  NOTE: To create a New **Contact** records, the Job must be in the **Job Builder** view. Click to create a new contact record.
- **Delete Contacts**: Click to delete a contact from the **Contacts** table. When completed, click the **OK** button.

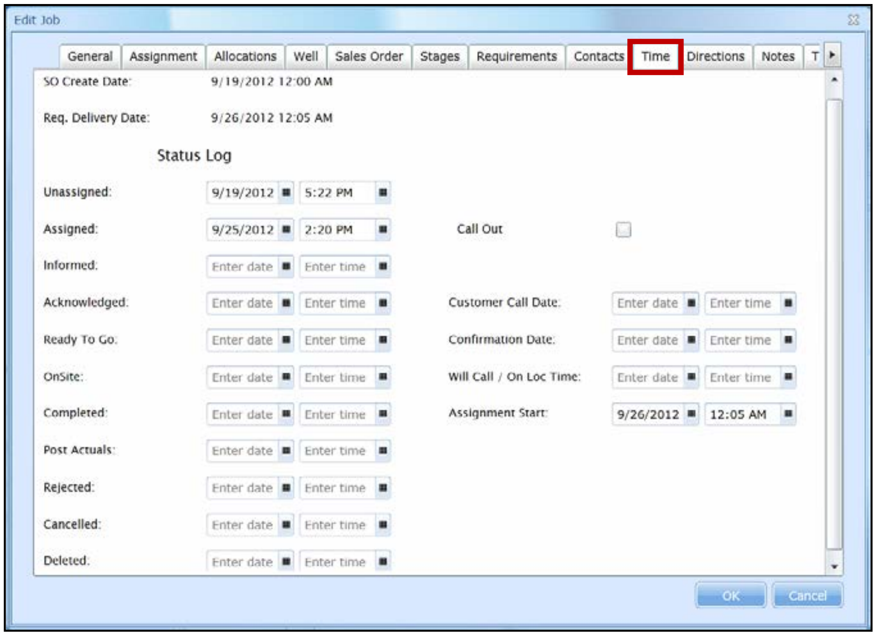
9. Utilization Tab



This tab is used to manually create Halliburton **Resource Utilization** records which can be viewed and edited in the **Resource Utilization View.**

NOTE: See the **Create Utilization Records** Quick Reference Card for how to create utilization records.

10. Time Tab



- **SO Create Date**: Displays the sales order creation date.
- **Req. Delivery Date**: Displays the required delivery date and time of the job. This information is populated from the SAP sales order.
- **Status Log**: Displays the **Date** and **Time** information the job acquired a status update throughout the lifecycle of the job. It is a timestamp when statuses are changed but can be manually edited.
  - **Unassigned**: The job has passed from SAP to Click Schedule but the Scheduler has not yet assigned the job.
  - **Assigned**: The Scheduler has assigned the job by dragging the job to the Gantt.
  - **Informed**: The job has been sent to **Job Details.**
  - **Acknowledged**: The job has been acknowledged.
  - **Ready To Go**: Job preparations are complete and the crew is ready to leave the yard.
  - **On Site**: Crew has acknowledged the resources are on site.
  - **Completed**: Crew has indicated that the job has been completed.
  - **Post Actuals**: Partial and final post actuals have been performed and SAP has confirmed records posted. This is a C (Complete) status in SAP.
  - **Rejected**: In the event that a **Sales Order** is rejected in SAP, the time stamp of the cancellation is passed to this field.
  - **Cancelled**: Used to enter the date and time for a job that has been cancelled. Cancelling a job in ClickSchedule does not update any status in SAP.

- **Deleted**: In the event that a **Sales Order** is deleted rather than rejected in SAP, the time stamp of the deletion is passed to this field.

- **Call Out**: Mark this checkbox if a job is spontaneous or a customer calls with a job.

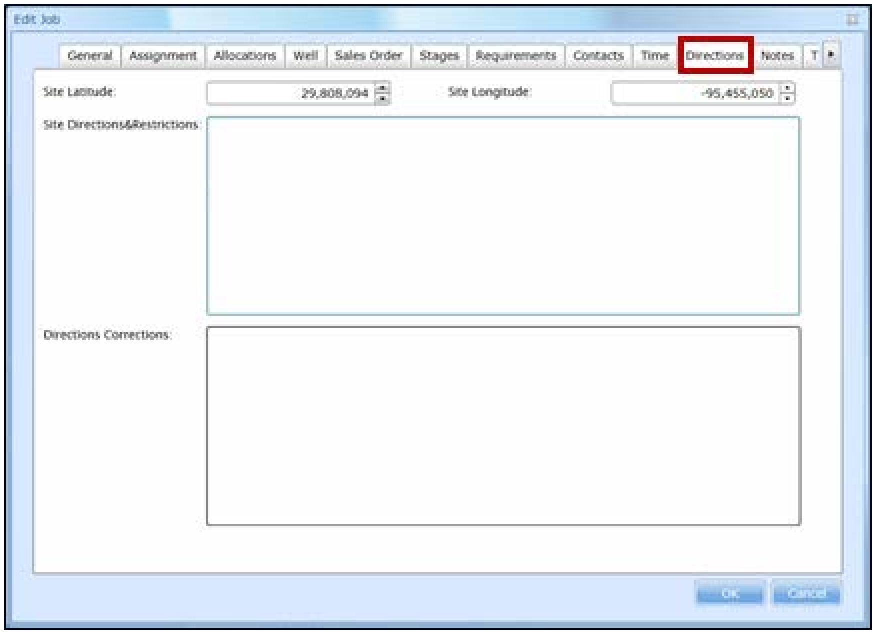
- **Customer Call Date**: Used to enter the date the customer was called.

- **Confirmation Date**: Used to enter the confirmation date.

- **Will Call** / **On Loc Time**: Used to enter the date by which **Will Call** is due or time crew needs to be on location.

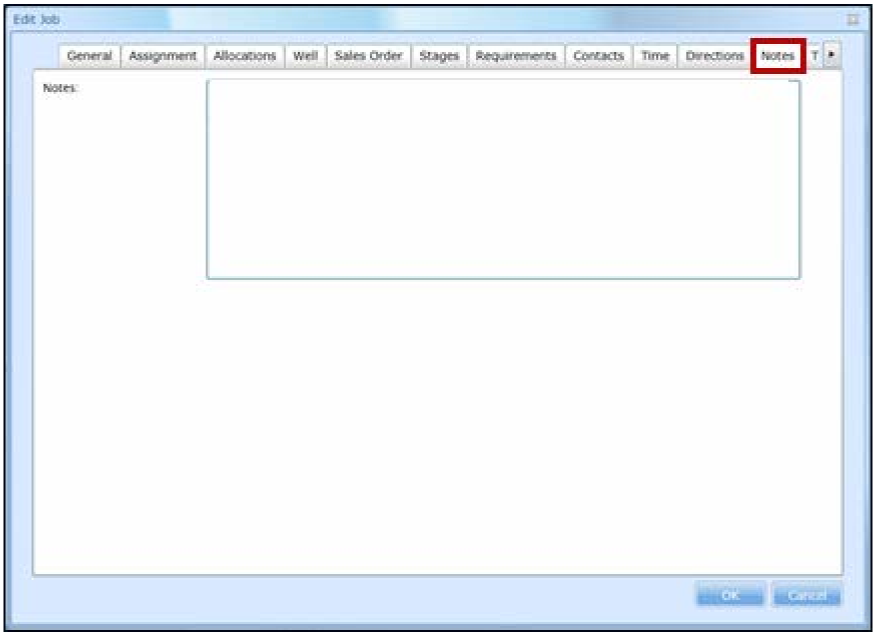
- **Assignment Start**: Displays the intended start date and time of the job. The field may be edited.

11. Directions Tab



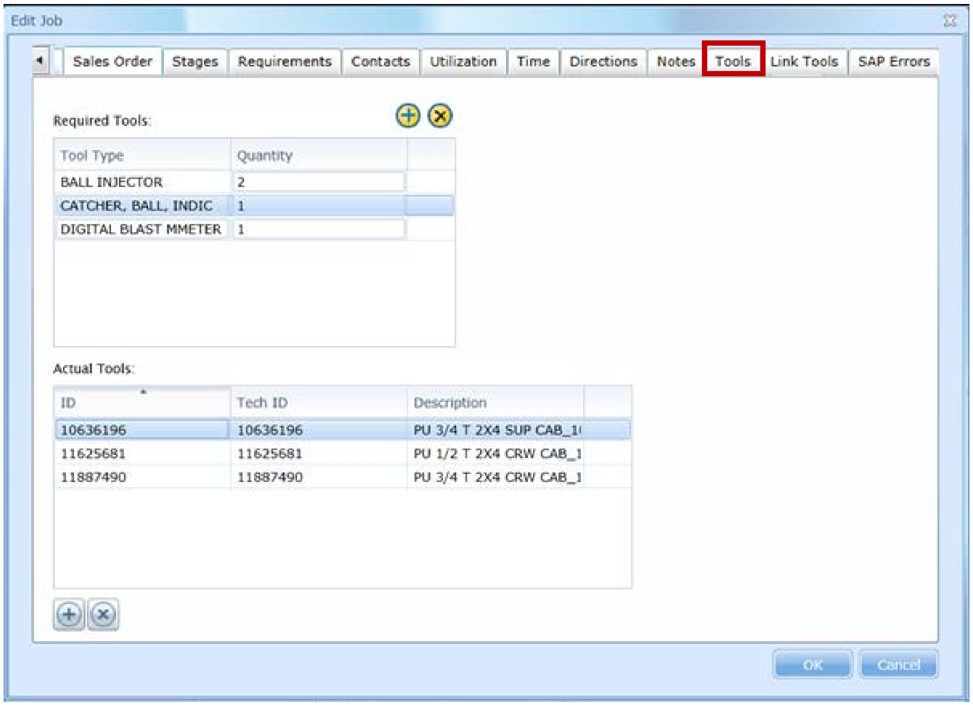
- **Site Latitude**: Default latitude information of the job site. This is based on the **Ship To** information.
- **Site Longitude**: Default longitude information of the job site. This is based on the **Ship To** information.
- **Site Directions & Restrictions**: Used to enter the directions to and restrictions for the site in the text box
- **Direction Corrections**: Generally, this field is populated from corrections sent by the Mobile Lead User– road closures, etc.

12. Notes Tab



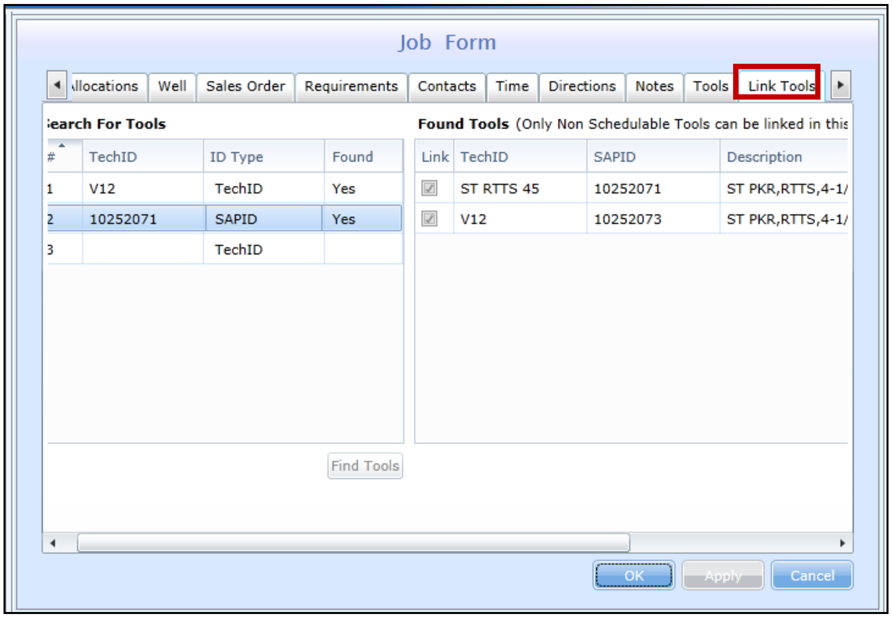
- **Notes**: Used to enter any job-related notes. This information is passed to **Job Details**.

13. Tools Tab



- **Required Tools**: Contains the tools, which are required for a job. Click to insert a new tool record. To delete an existing tool record, select the record to be deleted and then click .
    - **Tool Type**: In the row header, click the **Tool Type** drop-down and then select a type of tool.
    - **Quantity**: In the row header, click the **Quantity** drop-down and then enter a whole number.
- **Actual Tools**: This table contains the records of the actual tools that were used on the job.
    - **ID**: Displays the unique identifier assigned to the tool
    - **Tech ID**: Displays the technical identifier of the tool
    - **Description**: Displays a brief description of the tool
    - **Add Actual Tools**: Clic to open the **Equipment Manager** form. Filter the list as necessary, and then mark the checkbox associated with the tools or other equipment that was actually used on the job. Then click the **OK** button to save the tool selections.
        1. To delete an existing tool record, select the record to be deleted and then click .

14. Link Tools Tab



- **Search For Tools:** Table allows searching for multiple tools at once. Enter **TechID/SAPID** and select the **ID Type**. To add another row, click the **Tab** key on your keyboard. Table searches for Schedulable and Non Schedulable. Only **Non Schedulable Tools** can be linked. Please see **Link Tools Tab QRC** for more information and instructions.

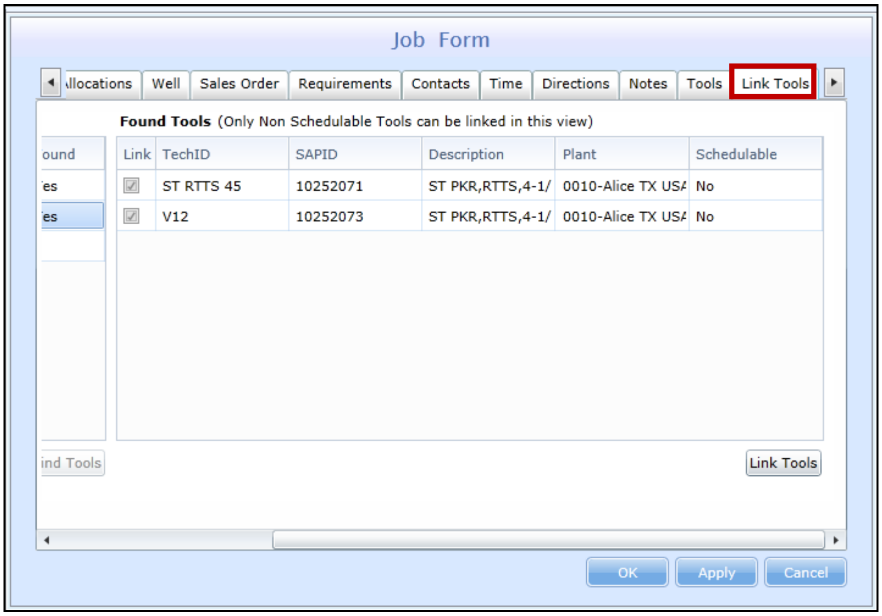
  - #: Identifies the number of tools you are searching.

  - **TechID:** Click the **TechID** box and enter a TechID or SAPID.

  - **ID Type:** Identify if the ID entered in the **TechID** column. Click the **ID Type** dropdown and then select the type of ID.

  - **Found**: Displays **Yes** or **No** once the **Find Tools** button is clicked. **Yes** means the tool was found and is added to the Found Tools panel. **No** means the tool was not found and was NOT added to the Found Tools panel.

  - **Find Tools Button**: Once **TechID** and **ID Type** are filled in, click the **Find Tools** button and the tools will display in the **Found Tools** section of the panel on the right side.

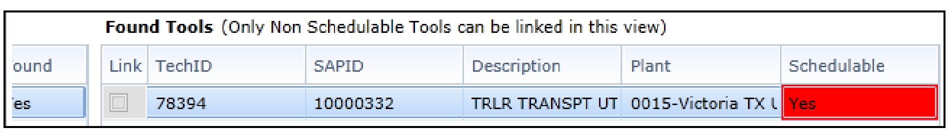


- **Found Tools**: Displays the tools found from the **Search for Tools** panel once you click the **Find Tools** button.

  - **Link Tools button:** Links all the tools that have the **Link** box **checked** in the **Tools** tab. Click the **Link Tools** button and pop up window displays describing the number of tools linked.

For Schedulable Tools:

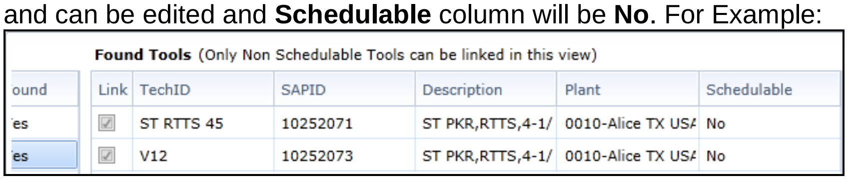
  - **Link:** If a schedulable tool is searched, this checkbox will be unchecked and cannot be edited. For Example:



*The tool searched was schedulable and this is how it is viewed under **Found Tools** panel. Notice the **Link** checkbox is unchecked and **Schedulable** column is Yes and red.*

For Non Schedulable Tools:

  - **Link:** Needs to be checked if you want the tool to appear on the **Tools** tab. If a non schedulable tool is searched, this checkbox will be checked and can be edited and **Schedulable** column will be **No**. For Example:



*The tool searched was not schedulable and this is how it is viewed under the **Found Tools** panel. Notice **Link** checkbox is checked and **Schedule** column is No.*

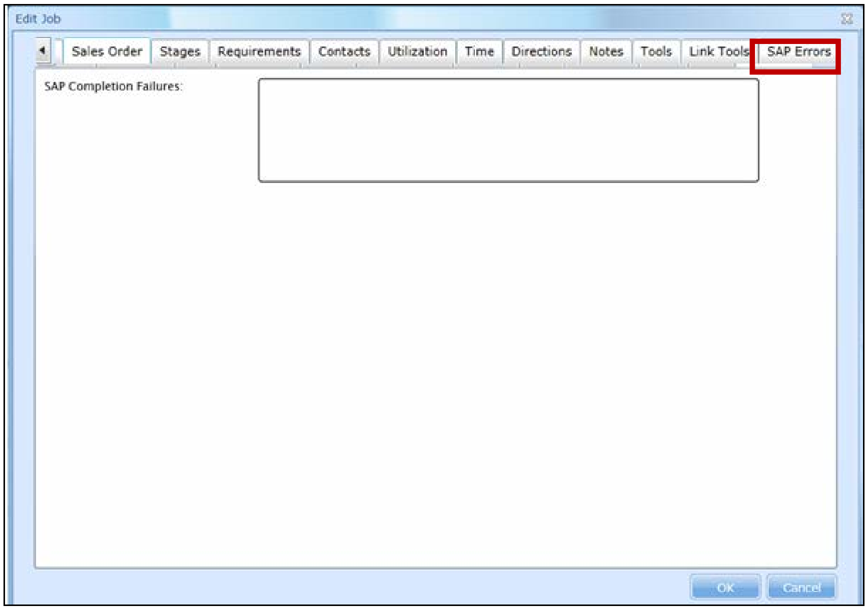
For Non Schedulable and Schedulable Tools:

- **TechID**: Displays the technical indentifier of the tool.
- **SAPID**: Displays the SAP identifier of the tool.
- **Description**: Displays a brief description of the tool.
- **Plant**: Displays the plant information.
- **Schedulable:** Displays whether the tool is Schedulable, **Yes** or not Schedulable, **No.**

NOTE:

- The **Link Tools** tab will not display for read only users
- **Link Tools** tab will not display for post actual, rejected, cancelled and deleted jobs

15. SAP Errors Tab



SAP Completion Failures: SAP errors display in this box in the event that **Partial Post Actuals** fails. The type of SAP errors will be described.

Edit Job Form - PE

The **Edit Job** form holds all the relevant properties for a job. Information concerning the job may be edited from the **Job** list in the **Scheduling** view, an **Assigned** job on the **Resource Gantt**, or the **Job Builder** view.

NOTES:

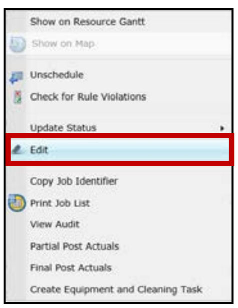
9. The **Assignment** tab only appears on the form when the job has been scheduled and in the **Scheduling** view.
10. Your PSL may not use all of the fields that are currently displayed in this document.

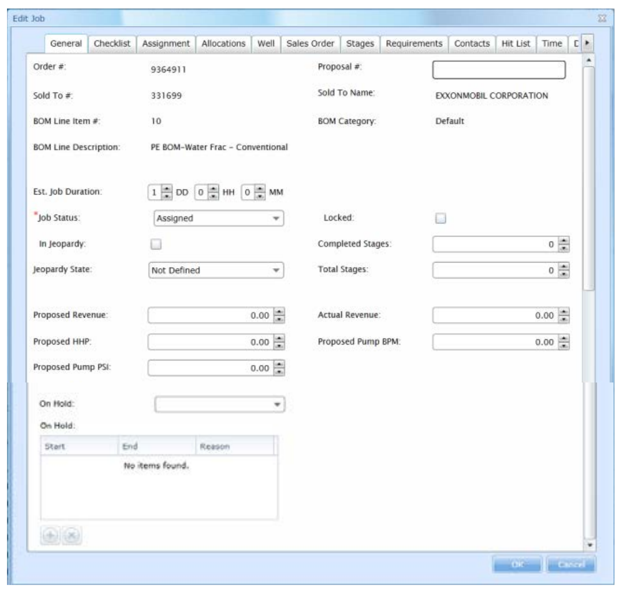
To view/edit the **Edit Job** form:

11. Right-click on the required job (from Job List/Gantt/Job Builder view). A list of options displays.

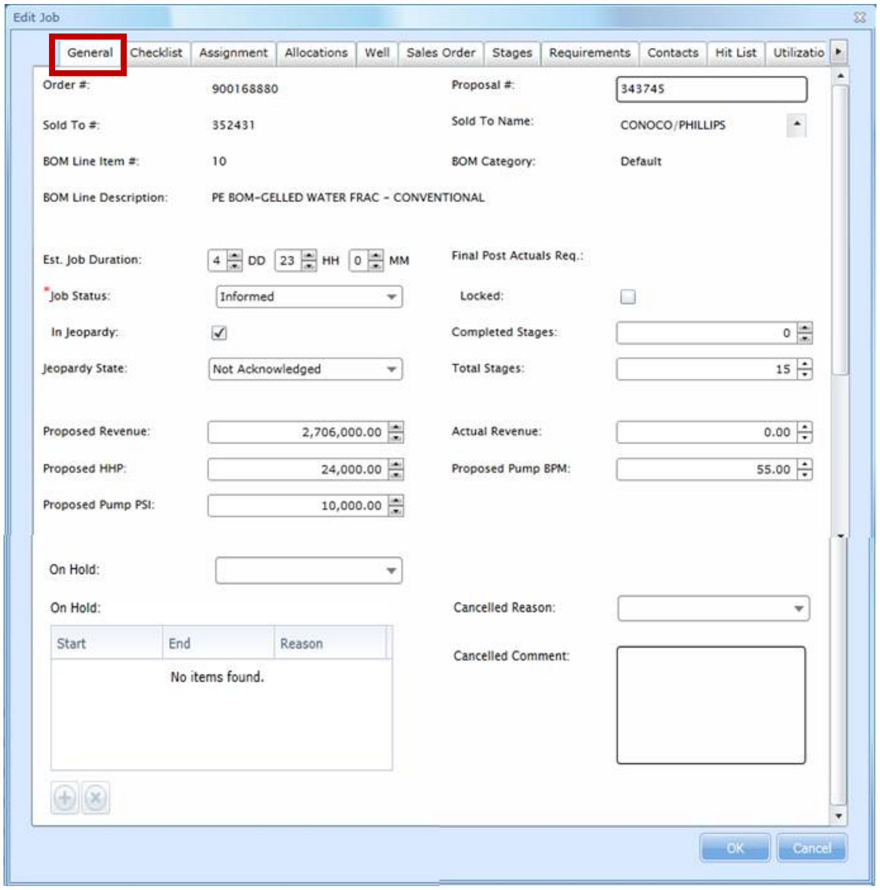
12. Select the **Edit** option. The **Edit Job** form displays

NOTE: You can also double-click any job to display the **Edit Job** form.





1. General Tab



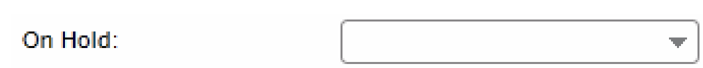
- **Order #**: Displays sales order number of the job
- **Proposal #**: Used to enter the proposal number
- **Sold To #**: Displays the customer number associated with the job
- **Sold to Name**: Displays the customer name associated with the job
- **BOM Line Item #**: Displays Bill of Materials line item number for the job
- **BOM Category**: Displays the grouping of services and materials that will be provided for a job
- **BOM Line Description**: Displays the short Bill of Materials line description for the job
- **Est. Job Duration**: By default, this field is set at a day but can be manually changed. The field is populated with the estimated duration of the job, gate-to-gate.
- **Job Status**: Displays the current status of the job

NOTE: In most cases, after the Scheduler updates the status to **Informed**, subsequent statuses of the job are generally updated from **Job Details** (the ClickSchedule mobile application). However, if necessary, the job status can also be updated in the **Edit Job** form.

- **Locked**: Check this box if the job needs to be locked. It prevents the job from being assigned to another crew. This makes the **Locked Comment** field visible. When checked, the is visible in the **Locked** column of Job List.
- **Locked Comment:** Used to enter the reason in this text field for locking the job. This is a required field if the **Locked** checkbox is selected.
- **In Jeopardy**: Check this box if the job is **In Jeopardy**. When checked, this turns on the **In Jeopardy** indicator .
- **Jeopardy State:** Used to select the jeopardy reason

  NOTE: The **Jeopardy** checkbox and **In Jeopardy** reason may be auto-set due to business rules/policies that have not been met.

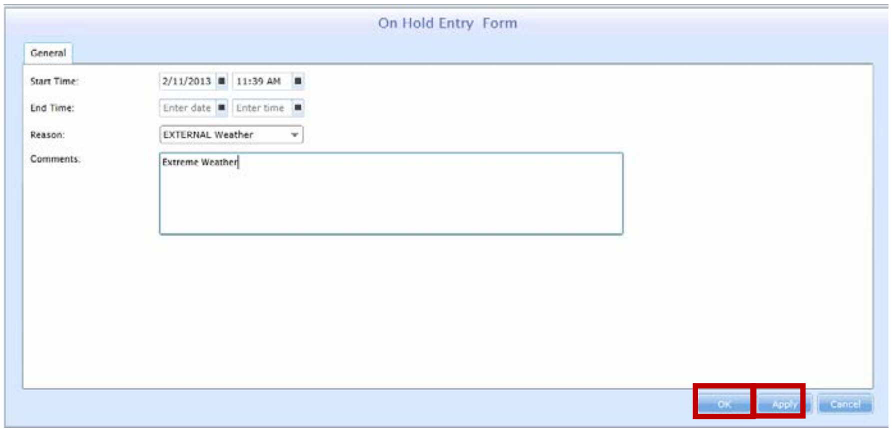
- **Completed Stages**: Used to enter the current stage value for the job
- **Total Stages**: Used to enter the total required stages of a job
- **Proposed Revenue**: Used to enter proposed job revenue. It is populated from the net value of the order, but can be manually changed.
- **Actual Revenue**: Used to enter actual job revenue
- **Proposed HHP**: Used to enter the proposed Horse Power (HHP) value for the job
- **Proposed Pump BPM**: Used to enter the proposed pump rate (Barrels Per Minute) for the job
- **Proposed Pump PSI**: Used to enter the proposed pump pressure (Per Square Inch) for the job
- **On Hold:** Use the drop down menu to select yes/no to indicate if the job is On Hold.



- The three columns that display on the **On Hold** table are:
  - **Start**: Select the time when the hold period starts.
  - **End**: Select the time when the hold period ends.
  - **Reason**: Select the **On Hold** reason for the job.

Click to add a new row to the **Hold Time** table. Click to delete a selected **Hold Time** record.

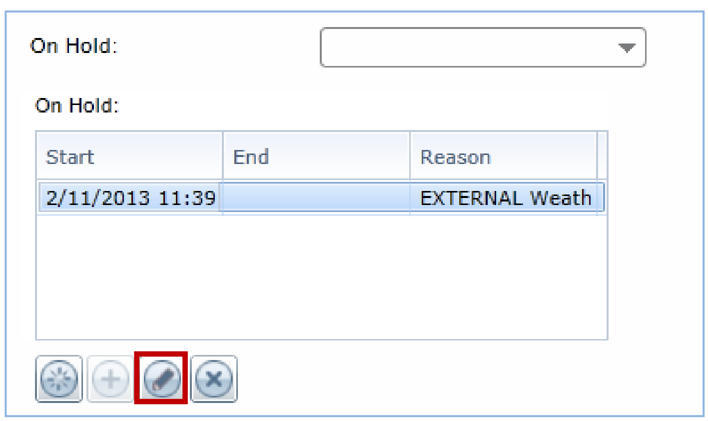
NOTE: To create a new **On Hold** record you need to be in the **Job Builder View**, but you can delete **On Hold** records from **Job Builder** and **Scheduling** view table.



- **Start Time:** Used to select the date and time when the hold period starts
- **End Time:** Used to select the date and time when the hold period ends
- **Reason**: Used to select the **On Hold** reason for the job
- **Comments**: Free text field to describe the **On Hold** reason details

Note: Click the **Apply** button and then the **OK** button. The entry displays in the **On Hold** table.

Note: The **On Hold** On Hol radio button displays on the line item for the Sales Order and on the **Job List** and the **Resource Gantt**.



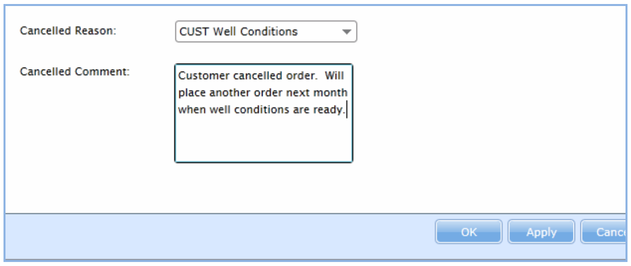
Note: To complete the **On Hold** table, click the line item to be completed, click , enter the **End Time** fields, click **Apply** button, click the **OK** button. The table is now updated and the Job is no longer **On Hold.**

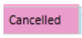
Note: Click to delete a selected **Hold Time** record.

NOTE: All cancelled fields are only visible when you cancel a job.

- **Cancelled Reason**: Used to select the reason for cancelling the job. This is a required field if the **Cancelled** checkbox is selected.

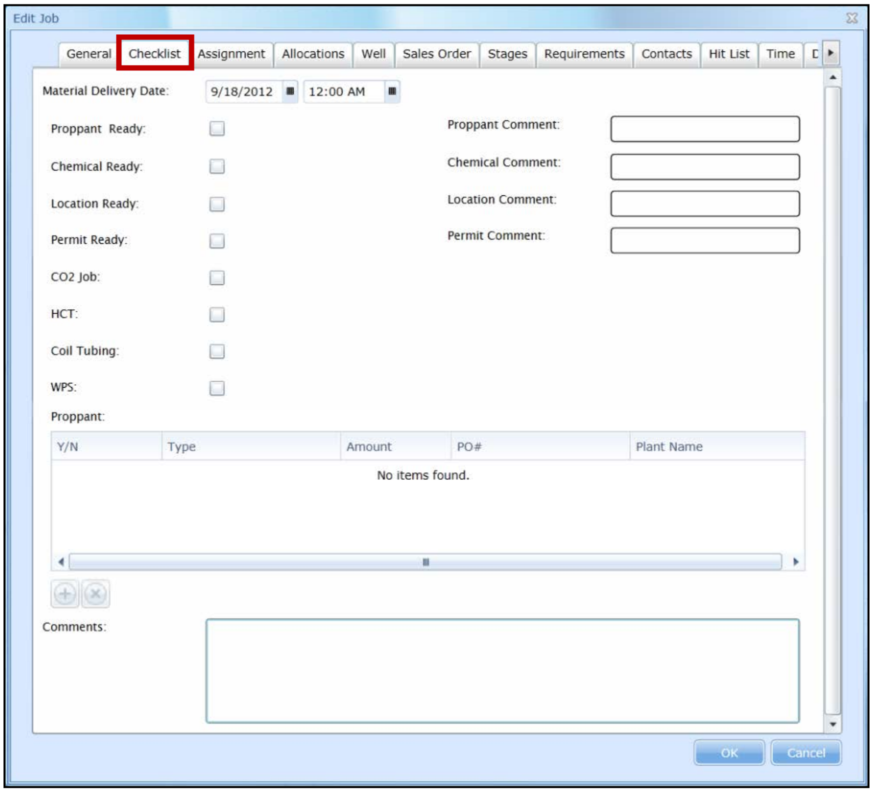
- **Cancelled Comment**: Free form text used to provide additional information for the job cancellation



Note: Click **Apply** button and a pop-up message appear. Click the **Yes** button to cancel the job. Click the **OK** button and the job status will change to **Cancelled** (

) in the **Job Builder** view and on the Job List in the **Scheduling** view.

2. Checklist Tab

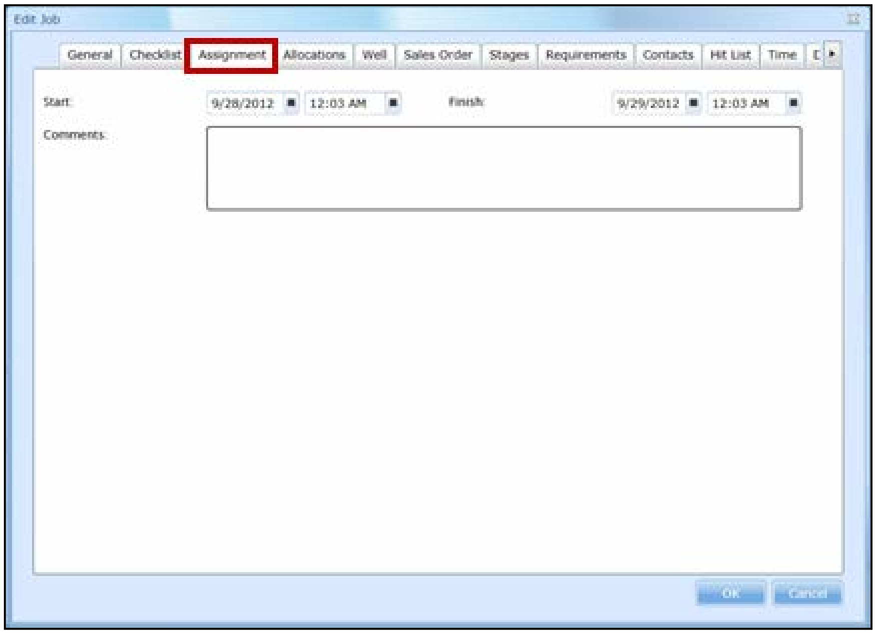


- **Material Delivery Date**: Used to enter the date and time of the material delivery. By default it is populated with the required delivery date from SAP. This may be changed as per the requirement.
- **Proppant Ready**: Check this box if the Proppant is ready
- **Proppant Comment**: Used to enter notes concerning proppant in this text field
- **Chemical Ready**: Checkbox is marked if chemical processes or systems are utilized during the job
- **Chemical Comment**: Used to enter notes concerning chemicals in this text field
- **Location Ready**: Checkbox is marked if the physical location where services are performed is ready
- **Location Comment**: Used to enter notes regarding location in this text field
- **Permit Ready**: Checkbox is marked if job requires permits, and they have been issued
- **Permit Comment**: Used to enter notes concerning permits in this text field
- **CO2 Job**: Checkbox is marked if job requires use of carbon dioxide

- **HCT**: Checkbox is marked if job requires services of Halliburton Completion Tools
- **Coil Tubing**: Checkbox is marked if job requires coil tubing service provided by Boots & Coots
- **WPS**: Checkbox is marked if job requires services provided by Wireline & Perforating Services
- **Proppant Table**: Displays details of proppant used during the job
  - **Y/N**: Select **Y** if proppant was used for the job
  - **Type**: Used to select the type of proppant from the dropdown list
  - **Amount**: Used to enter the quantity of proppant in this field
  - **PO #**: Used to enter the purchase order issued for the acquisition of proppant
  - **Plant Name**: Used to enter the name of the plant supplying proppant for the job

  Note: Click to add a proppant record. Click to delete a selected proppant record.
- **Comments**: Used for entering notes related to any of the **Checklist** items

3. Assignment Tab



NOTE: Assignment tab is only visible in the **Scheduling View** once the job has been **Assigned**.

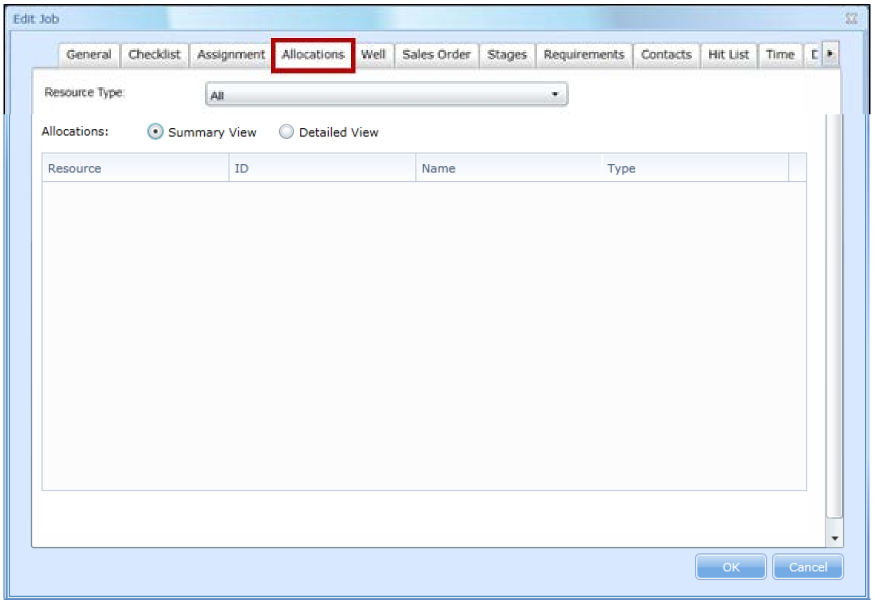
- **Start**: Displays the intended start date and time of the job (gate-to-gate). Populates when the job is dragged to the Gantt, but the field may be edited.

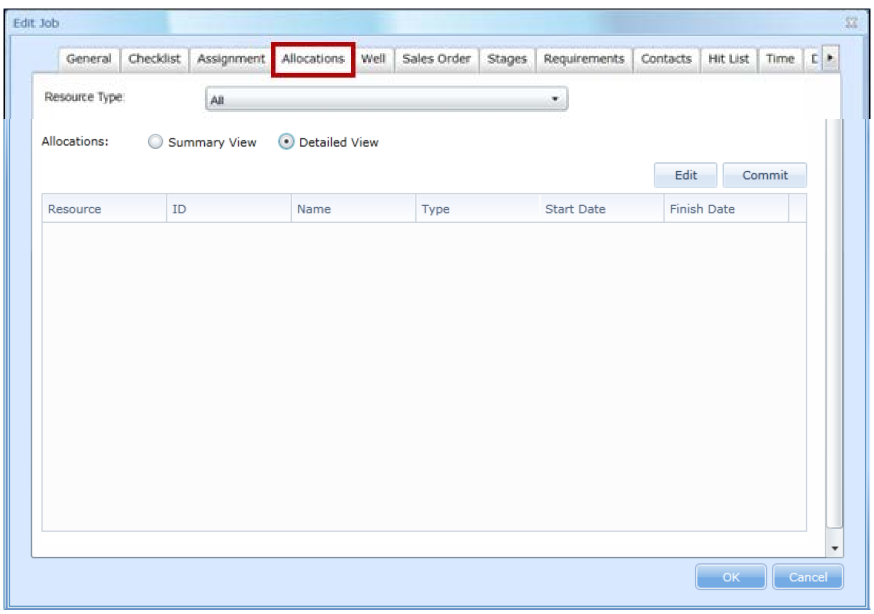
- **Finish**: Displays the intended finish date and time of the job (gate-to-gate). Populates when the job is dragged to the Gantt but the field may be edited.

  NOTE: The **Start Date** and **Time** is set when the job is dragged on to the **Resource Gantt** chart. After that, the start time can be edited. The finish date is adjusted in the mobile.

- **Comments**: Used to enter any comments related to the job

Allocations Tab





- **Resource Type**: Used to select the type of resource allocated to the job. The resources are then displayed in the **Allocations** table.

- **Allocations**: Displays the list of resources allocated to the job according to the selected value in the **Resource Type** drop-down.

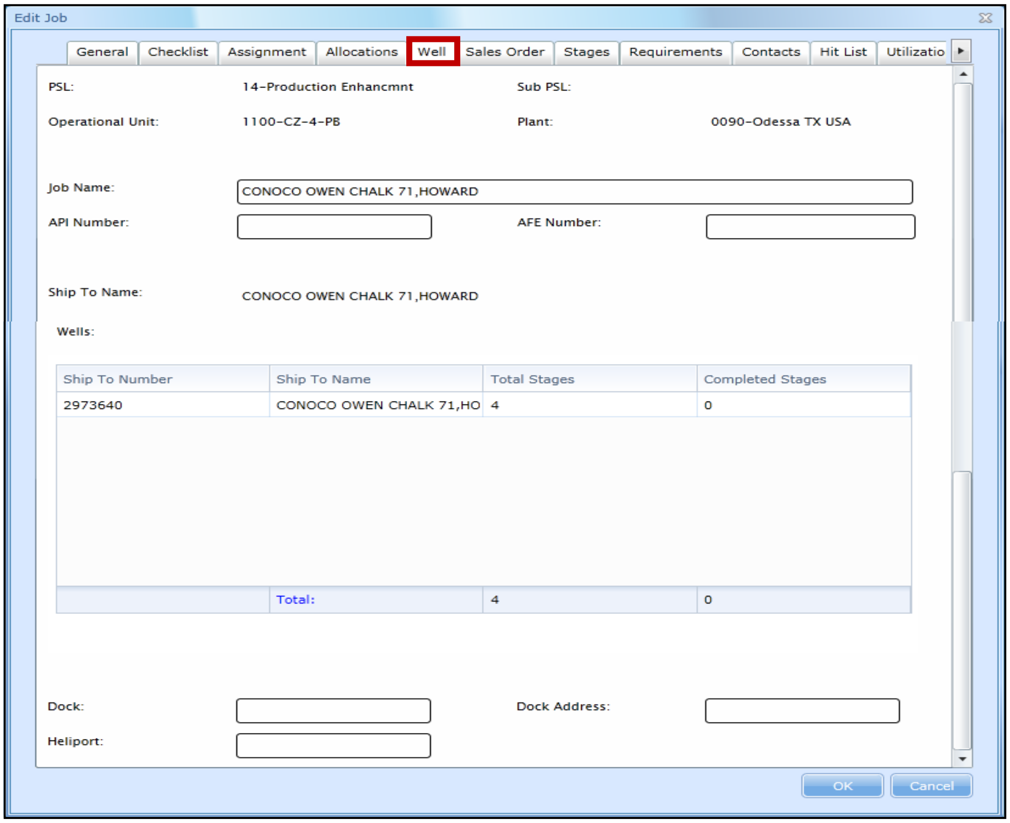
  - **Summary View** : Summary list of allocations

  - **Detailed View**: Detailed list of allocations and allocation times

  - **Resource**: Displays the type of resource, for example, Individual, Equipment

- **ID**: Displays the resource unique identifier (SAP ID#)
- **Name**: Displays the name of the resource
- **Type**: Displays the title of the resource
- **Start Date:** Start date and time of allocation
- **Finish Date:** Finish date and time of allocation
- **Edit:** Button that allows user to edit the allocation for the resources
- **Commit:** Button that allows user to commit the edits made to allocations

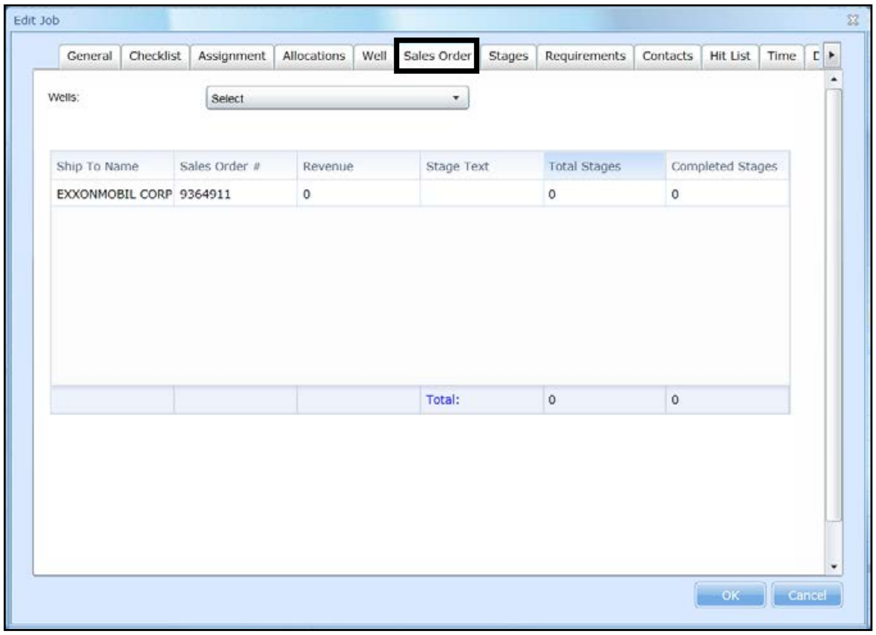
4. Well Tab



- **PSL**: Displays the Product Service Line
- **Sub PSL**: Displays a division within the primary Product Service Line
- **Operational Unit**: Displays the name of the operational unit of the job
- **Plant**: Displays the physical location to which the job is assigned
- **Job Name**: Used to enter more information pertaining to Job or Well. By default, the ship to name is entered, which consists of the customer name, well name, and number.
- **API Number**: A unique, numeric identifier assigned to each well by the American Petroleum Institute may be entered in this field.
- **AFE Number**: Used to enter the Authorization For Expenditures number of the job in this field
- **Ship To Name**: Displays the customer name, well name, and number

- **Wells Table**: Displays well details
  - **Ship To Number**: Displays SAP generated **Ship To** number
  - **Ship To Name**: Displays the name of the customer operating the well
  - **Total Stages**: Displays the number of stages the job comprises
  - **Completed Stages**: Displays the number of stages completed for the job
  - **Total:** Counts number of **Total Stages** and number of **Completed Stages** populated from the **Sales Order** tab
- **Dock**: Used to enter dock information
- **Dock Address**: Used to enter the dock address
- **Heliport**: Used to enter heliport information

5. Sales Order Tab

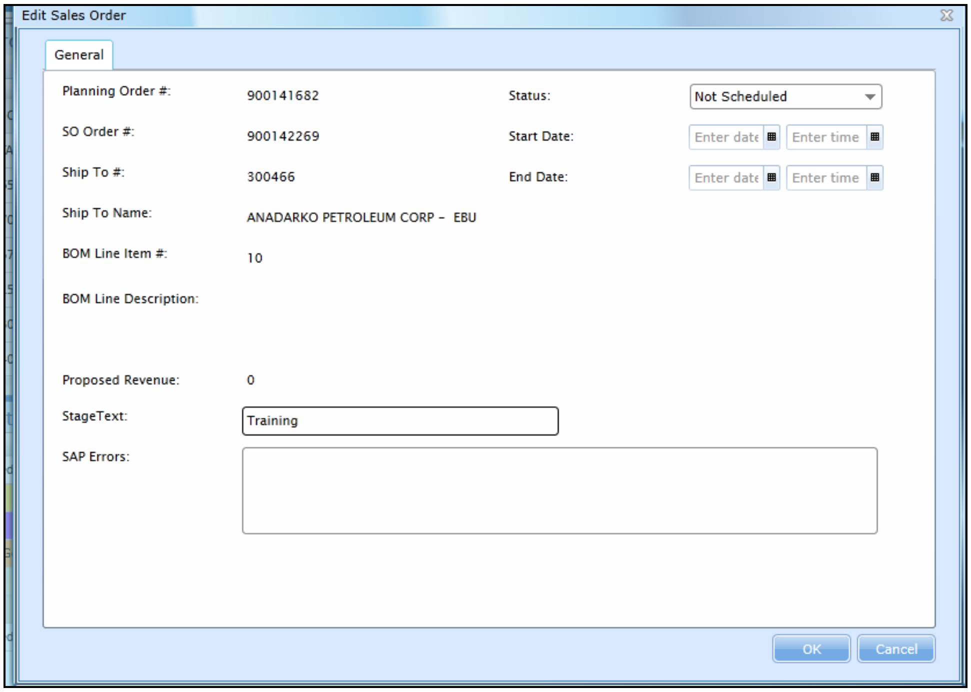


- **Wells**: Used to select the sales order/well. It will display the different ship to's.
- **Sales Order Table**: Displays a list of customer or well details for the selected value of determined by using the **Wells** dropdown menu
  - **Ship To Name**: Displays the the customer name, well name, and number
  - **Sales Order**: Displays the sales order number for the job
  - **Revenue**: Displays the proposed revenue the job will generate
  - **Stage Text**: Contains text concerning the stages of the job
  - **Total Stages**: Displays the number of stages for the job
  - **Completed Stages**: Displays the number of completed stages for the job
  - **Total**: Counts the number of **Total Stages** and the number of **Completed Stages**

NOTE: When using Planned Orders, Order Type ZBPO, and the ZOH Sales Order **does not** have any stages, it will be necessary to update the ZOH sales order with the "Sales Order End Date" manually. See **How to add end date for ZOH child QRC**.

Select the sales order without stages and double click on the line item that is highlighted and the **Edit Sales Order** form displays.

Ship To Name	Sales Order #	BOM Number	Revenue	Stage Text	Total Stages	Completed Stage
ANADARKO PETF	900142270	000010	0	Training	1	0
ANADARKO PETF	900142269	000010	0	Training	1	0



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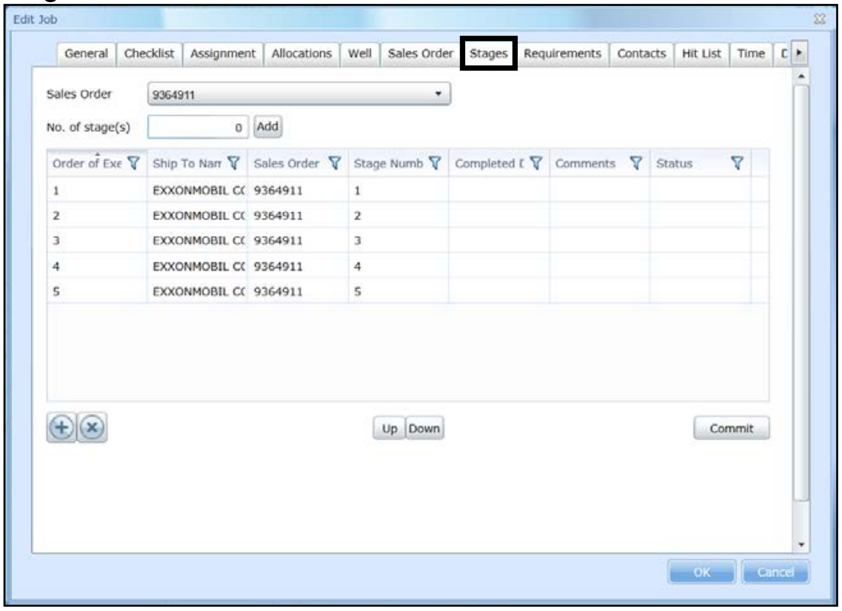
NOTE: End Date and **End Time** must be entered. If the ZOH (associated to the ZBPO sales order) has stages, the completed date and time for the last stage will populate the ZOH end date and time.

NOTE: If there are errors during the partial posting of the ZOH order, it will display in the **SAP Errors** field. Refer to the QRC's, **Resolve Resource Utilization** and **Resource Utilization View** for further details on how to resolve resource utilization errors.

6. Stages Tab



- **Sales Order**: From the drop-down, choose the **Sales Order** in which to display the detail records in the **Stage** table.
- **No. of Stage(s)**: Used to enter the number of stages incorporated in the job
- **Add**: Click the 

 button to automatically calculate stages
- **Stage Details Table**: Displays the details of the stages

  NOTE: Click  on any of the column headers to filter the column data.

  – **Order of Execution**: Displays the execution order of the stages

  – **Ship To Name**: Displays the combination of the customer and well name

  – **Sales Order**: Displays the sales order number for the job

  – **Stage Number**: Displays the number of the stage

  – **Completed Date**: Displays the date the stage was completed

  – **Comments**: Displays comments concerning the associated stage

  – **Status**: Displays Completed or Skipped based on entry from mobile

- **Add**: Click  button to insert another row into the **Stages** table.
- **Delete**: Click  button to remove a selected row in the **Stages** table.
- **Up**: Click 

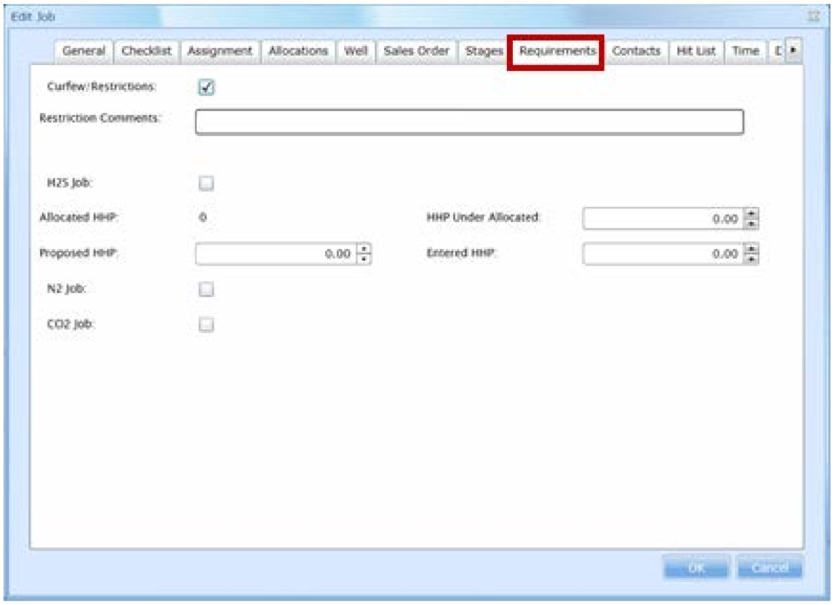
 button to move the selected row up in the **Stages** table.
- **Down**: Click 

 button to move the selected row down in the **Stages** table.

- **Commit**: Click Commit button to save the layout of the **Stages** table.

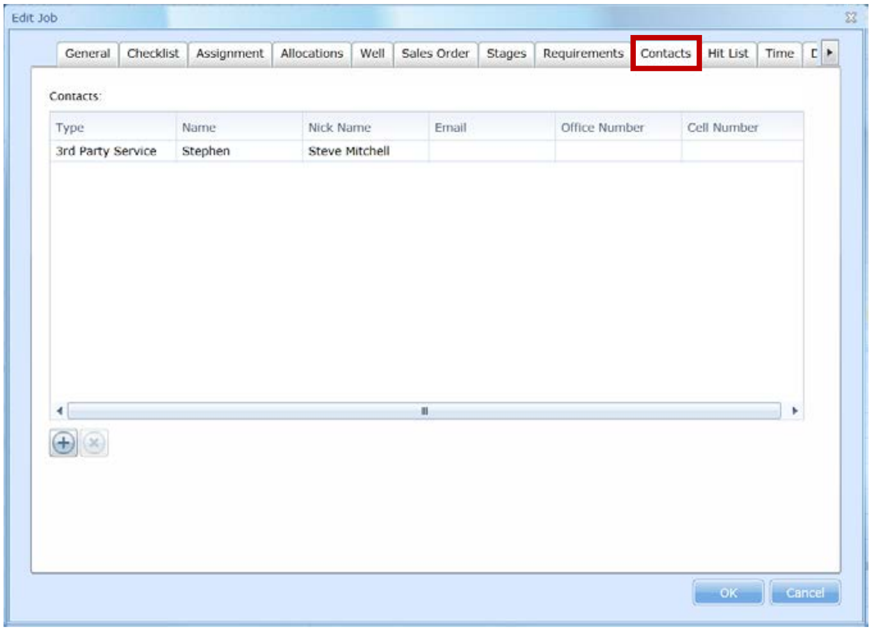
NOTE: If the job is in a status prior to complete, stages can be reassigned to another ZOH (associated with that ZPBO sales order). See **Setting up Individual Stages QRC** for steps on adding and updating stages**.**

7. Requirements Tab



- **Curfew/Restriction**: Check this box if there is a curfew or restrictions.
- **Restriction Comments**: Field appears when **Curfew/Restriction** is checked. Used to add comments in the text box regarding restrictions.
- **H2S Job**: Check this box if the job is a **H2S** job.
- **Allocated HHP**: Displays the allocated HHP value for the job.
- **HHP Under Allocated**: Used to enter the amount of horse power that is under allocated for the job in this field.
- **Proposed HHP**: Used to enter the proposed horse power required for the job in this field. If entered in the General tab, it will be pre-populated on this tab.
- **Entered HHP**: Used to enter the actual horse power used for the job in this field.
- **N2 Job**: Check this box if nitrogen foam is required for this job. Sets associated **N2** fields as visible.
  - **N2 Rate** (SCF): Used to enter the rate of nitrogen in this field.
  - **N2 SO #**: Used to enter the sales order number for the nitrogen used for the job in this field.
  - **N2 Volume** (SCF): Used to enter the volume of nitrogen.
- **CO2 Job**: Check this box if carbon dioxide foam is required for this job. Sets associated **CO2** fields visible.
  - **CO2 Rate** (BPM): Used to enter the rate of carbon dioxide.
  - **CO2 Volume** (TON): Used to enter the volume of carbon dioxide.

8. Contacts Tab

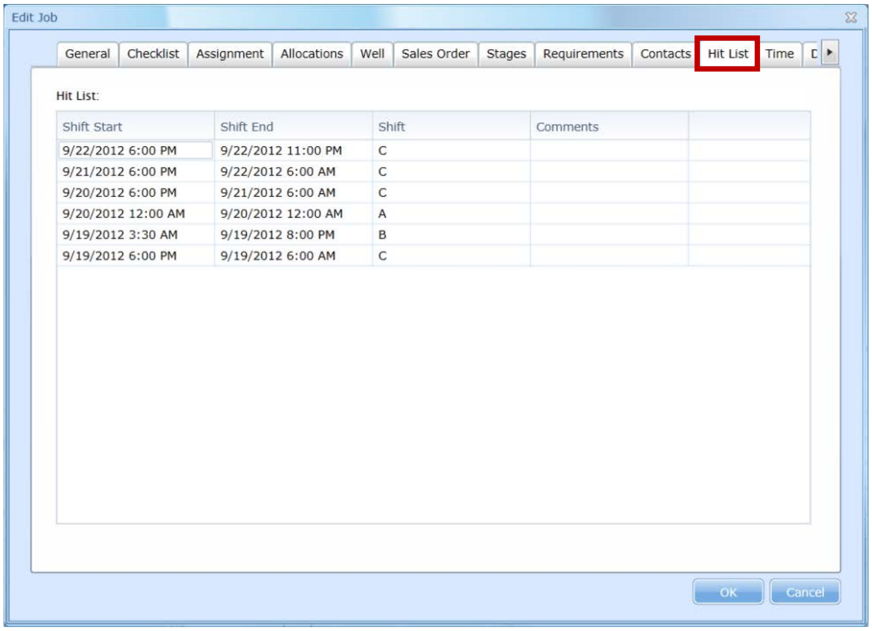


- **Contacts**: Displays a list of contacts associated with the job
  - **Type**: Displays the contact type
  - **Name**: Displays the first name of the contact
  - **Nick Name**: Displays a nick name for the contact
  - **Email**: Displays the email address for the contact
  - **Office Number**: Displays the office telephone number for the contact
  - **Cell Number**: Displays the mobile telephone number for the contact
- **Add Contacts**: To insert a contact details row in the **Contacts** table click . The **Contacts Search** form is displayed. Search for, and then select the desired contacts by marking the appropriate checkboxes in the form. When completed, click **OK**.

  NOTE: New **Contact** records are created in the **Job Builder** view. Click to create a new contact record

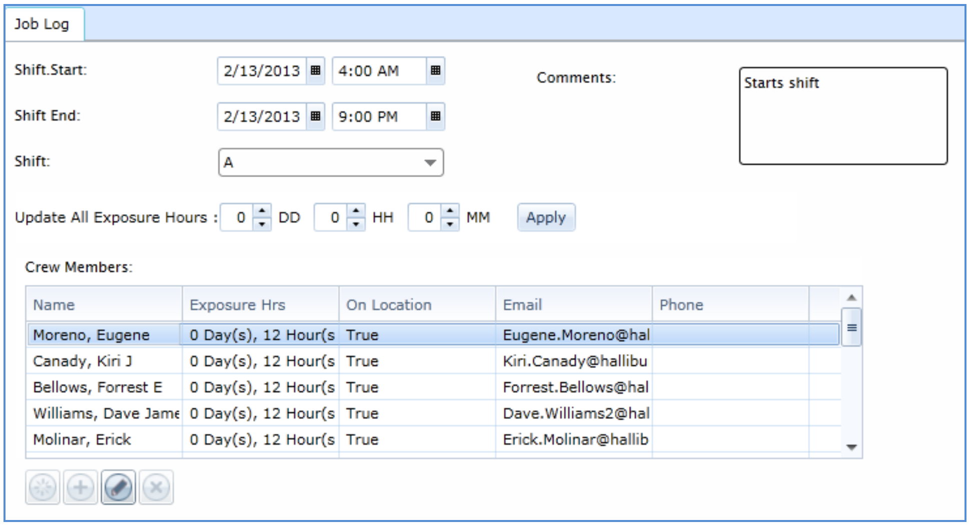
- **Delete Contacts**: Click to delete a contact from the **Contacts** table. When completed, click the **OK** button.

9. Hit List Tab



- **Hit List**: Displays each shift's start and end times during the life of the job. This information is generally entered and updated by the Mobile Lead Users; however, it can also be updated by double-clicking on the job in the **Job Builder View**.
  - **Shift Start**: Displays the beginning start date and time of the shift
  - **Shift End**: Displays the ending time of the shift
  - **Shift**: Displays the name of the shift
  - **Comments**: Displays comments concerning the shift

- **Job Log** (displays once the Shift is double-click from the Hit List in Job Builder view)

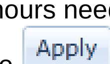


- **Shift Start**: Populated from time entered by Shift Supervisor for Depart time from mobile. Entry can be edited manually.

- **Shift End**: Populated from time entered by Shift Supervisor for Return time from mobile. Entry can be edited manually.

- **Shift**: Denotes the shift selected

- **Update All Exposure Hours**: Populated from the Hours entered via mobile by the Shift Supervisor

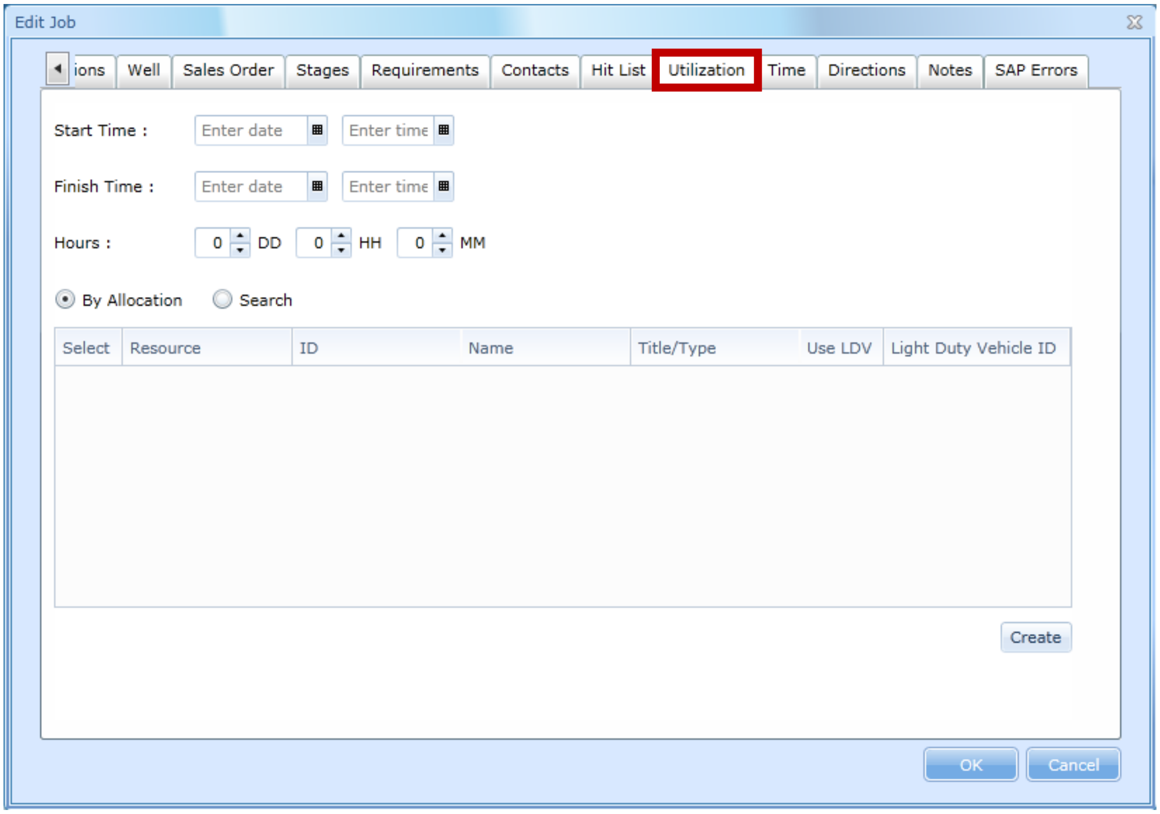
- **Edit Exposure Hours**: If exposure hours need to be edited, populate the **Update All Exposure Hours** field and click the 

button.

- **Comments:** Populated from the Comments entered when Shift Supervisor creates Call Out via mobile

- **Crew Members:** List of all individuals for selected Shift for particular day
  - **Name:** Individuals Last Name, First Name
  - **Exposure Hrs:** Listed Days and Hours entered via mobile
  - **On Location:** True/False based on Hit List from mobile
  - **Email:** Email address listed in ESS
  - **Phone:** Phone number listed

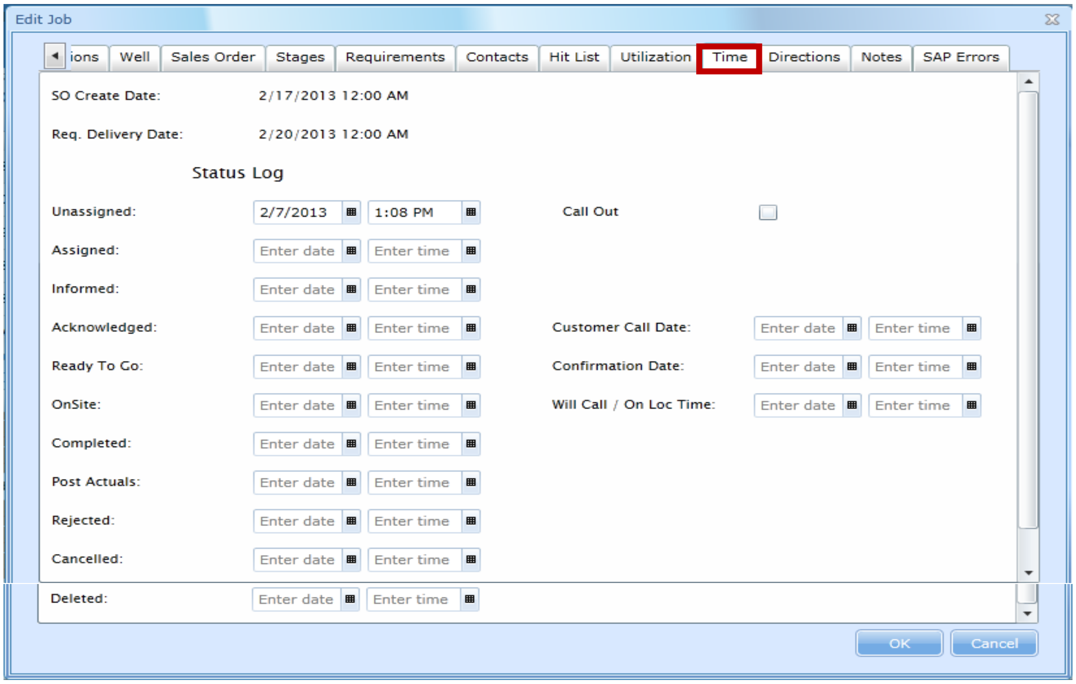
10. Utilization Tab



This tab is used to create Halliburton Resource Utilization records which can be viewed in the **Resource Utilization View**.

NOTE: See **Create Utilization Records** Quick Reference Card for how to create utilization records.

11. Time Tab

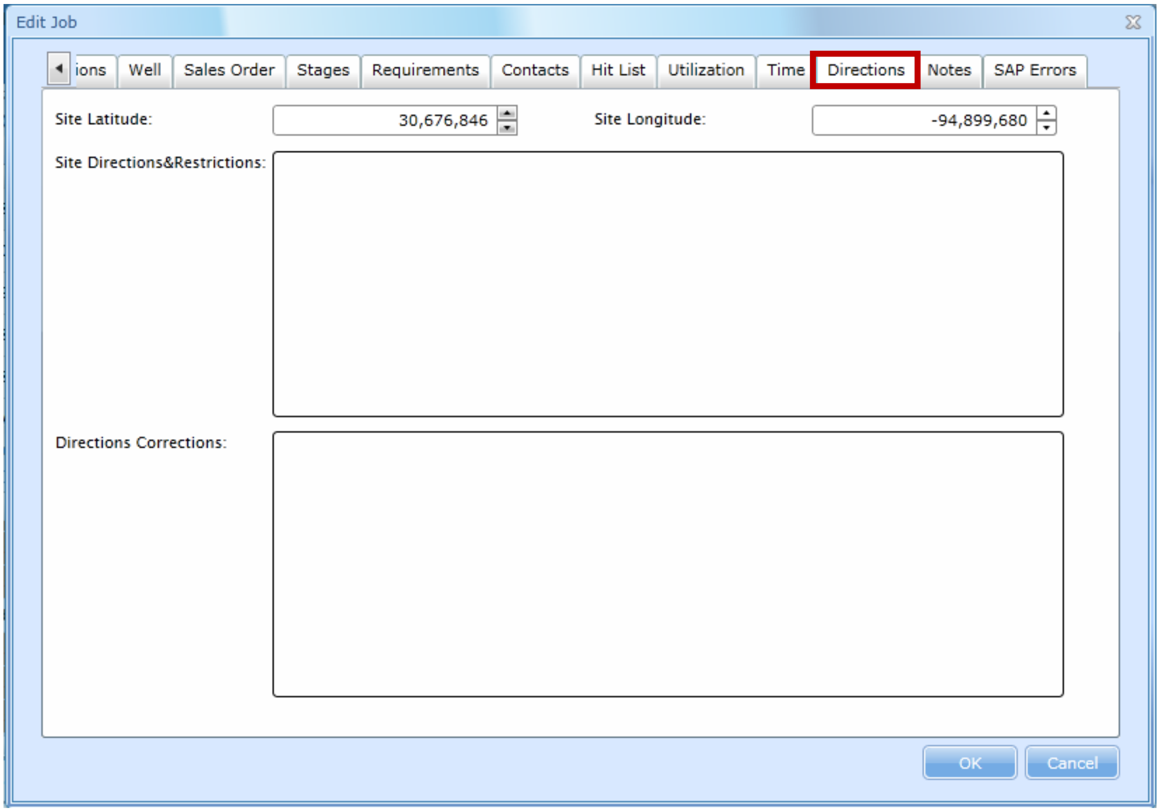


- **SO Create Date**: Displays the sales order creation date.
- **Req. Delivery Date**: Displays the required delivery date and time of the job. This information is populated from the SAP sales order.
- **Status Log**: Displays the **Date** and **Time** information the job acquired a status update throughout the lifecycle of the job. It is a timestamp when statuses are changed but can be manually edited.
  - **Unassigned**: The job has passed from SAP to ClickSchedule, but the Scheduler has not yet assigned the job.
  - **Assigned**: The Scheduler has assigned the job by dragging the job to the Gantt.
  - **Informed**: The job has been sent to **Job Details**.
  - **Acknowledged**: The job has been acknowledged.
  - **Ready To Go**: Job Preparations are complete, and the crew is ready to leave the yard.
  - **On Site**: Crew has acknowledged the resources are on site.
  - **Completed**: Crew has indicated that the job has been completed.
  - **Post Actuals**: Partial and final post actuals have been performed and SAP has confirmed records posted and C (Complete) status in SAP.
  - **Rejected**: In the event that a **Sales Order** is rejected in SAP, the time stamp of the rejection is passed to this field.

- **Cancelled**: Used to enter the date and time for a job that has been cancelled. Cancelling a job in ClickSchedule does not update any status in SAP.
- **Deleted**: In the event that a **Sales Order** is deleted rather than rejected in SAP, the time stamp of the deletion is passed to this field.

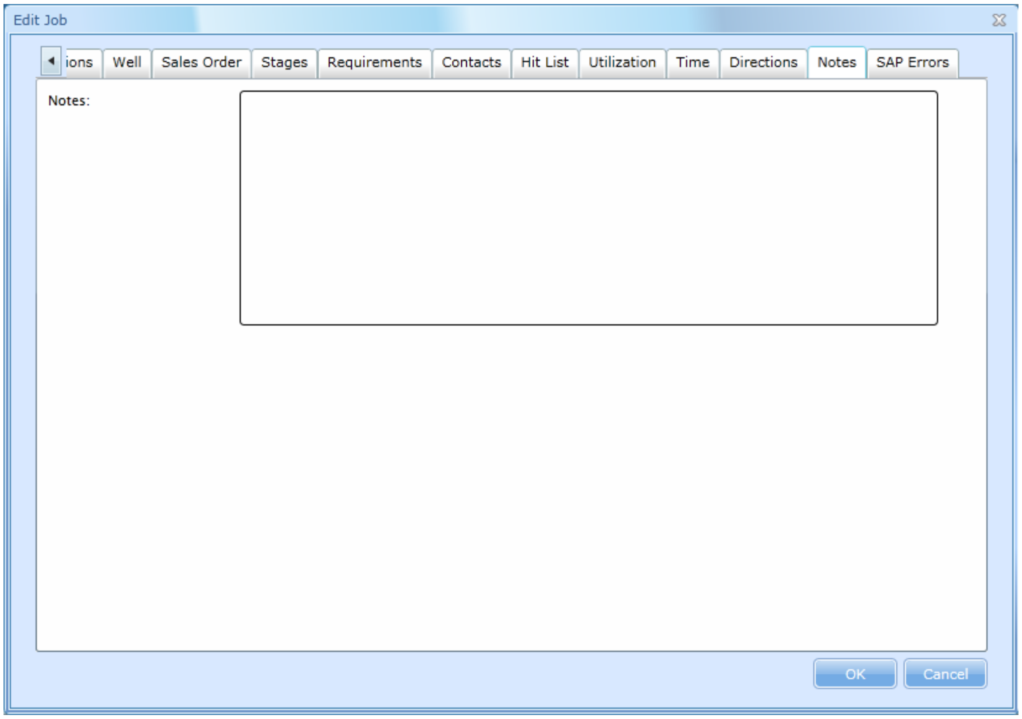
- **Call Out**: Mark this checkbox if a job is spontaneous or a customer calls with a job.
- **Customer Call Date**: Used to enter the date the customer was called
- **Confirmation Date**: Used to enter the confirmation date
- **Will Call** / **On Loc Time**: Used to enter the date by which **Will Call** is due or time crew needs to be on location

12. Directions Tab



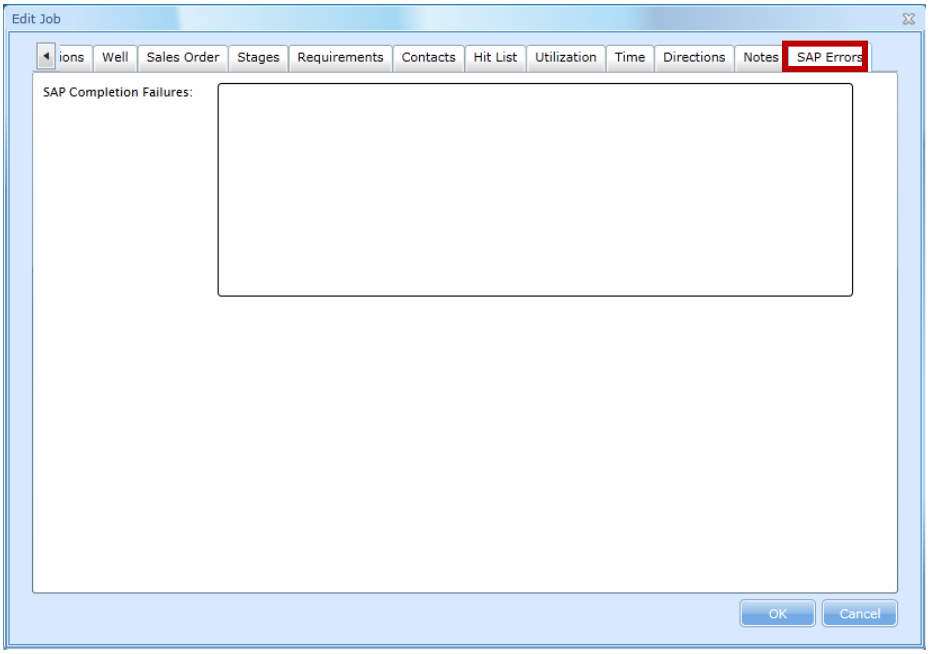
- **Site Latitude**: Default latitude information of the job site. This is based on the **Ship To** information.
- **Site Longitude**: Default longitude information of the job site. This is based on the **Ship To** information.
- **Site Directions & Restrictions**: Used to enter the directions to and restrictions for the site
- **Direction Corrections**: Generally, this field is populated from corrections sent by the Mobile Lead User– road closures, etc.

13. Notes Tab



- **Notes**: Used to enter any job-related notes. This information is passed to **Job Details**.

14. SAP Errors Tab



- **SAP Completion Errors**: In the event that **Partial Post Actuals** fails, error descriptions are passed to this field from SAP.

Note: See QRC titled: **Resolving Resource Utilization Errors** for step instructions on how to resolve SAP specific errors.

Edit Job Form – Wireline and Perforating Services (WPS)

The **Edit Job** form holds all the relevant properties for a job. Information concerning the job may be edited from the **Job** list in **Scheduling** view, an **Assigned** job on the **Resource Gantt**, or the **Job Builder** view.

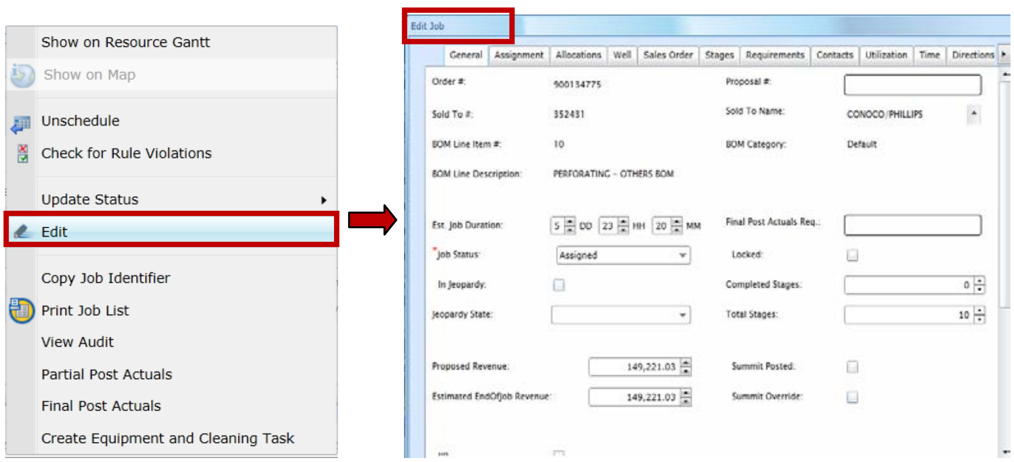
NOTES:

1. The **Assignment** tab only appears on the form when the job has been scheduled and in the **Scheduling** view.
2. Your PSL may not use all of the fields that are currently displayed in this document.

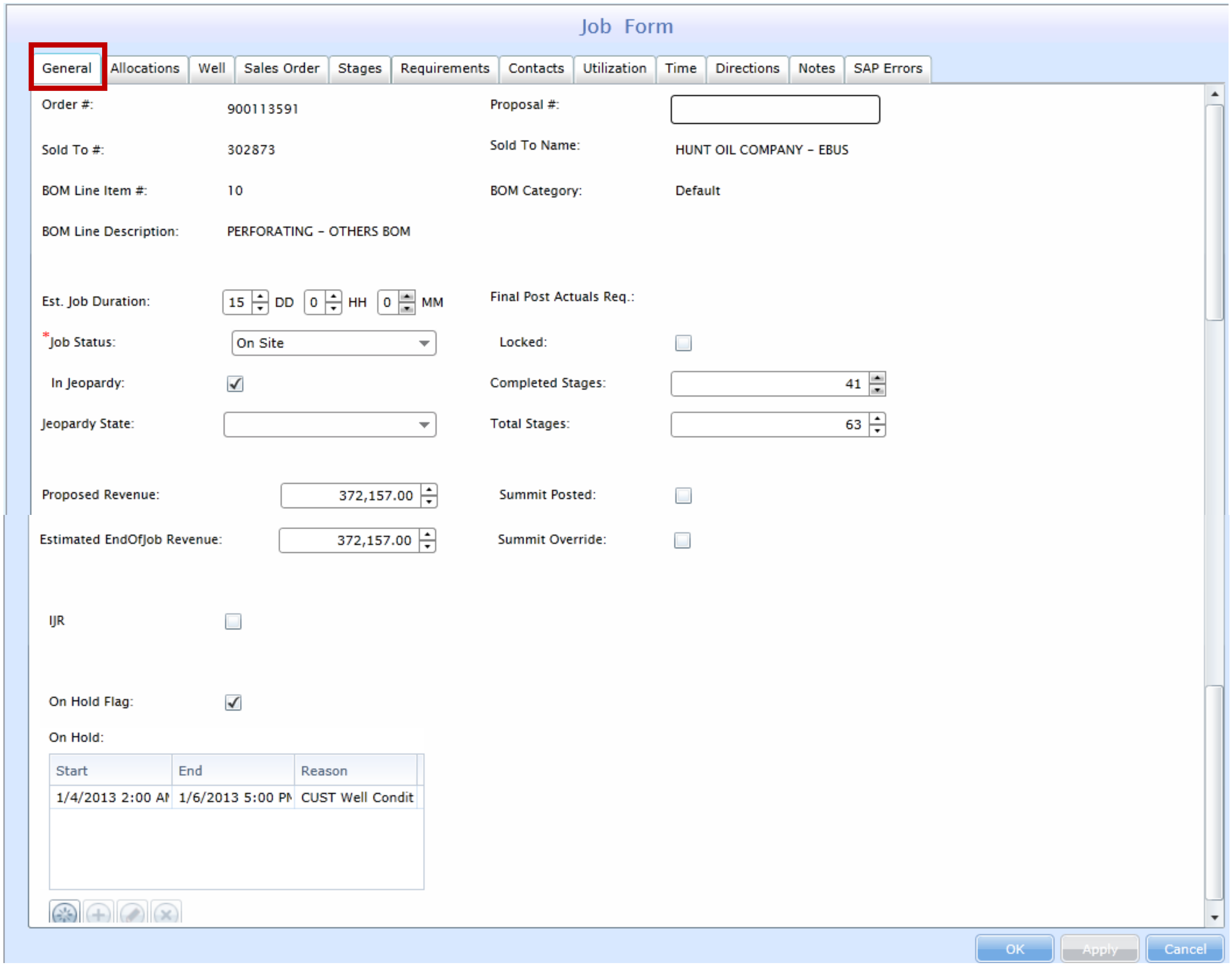
To view/edit the **Edit Job** form:

1. Right-click on the required job (from Job List/Gantt/Job Builder view). A list of options displays.
2. Select the **Edit** option. The **Edit Job** form displays

NOTE: You can also double-click any job to display the **Edit Job** form.



1. General Tab



- **Order #**: Displays sales order number of the job
- **Proposal #**: Used to enter the proposal number
- **Sold To #**: Displays the customer number associated with the job
- **Sold to Name**: Displays the customer name associated with the job
- **BOM Line Item #**: Displays Bill of Materials line item number for the job
- **BOM Category**: Displays the grouping of services and materials that will be provided for a job
- **BOM Line Description**: Displays the short Bill of Materials line description for the job

- **Est. Job Duration**: By default, this field is set at a day, but can be manually changed. The field is populated with the estimated duration of the job, gate-to-gate

- **Job Status**: Displays the current status of the job

  NOTE: In most cases, after the after the Scheduler updates the status to **Informed**, subsequent statuses of the job are generally updated from **Job Details** (the ClickSchedule mobile application). However, if necessary, the job status can also be updated in the **Edit Job** form.

- **Locked**: Check this box if the job needs to be locked. It prevents the job from being assigned to another crew. This makes the **Locked Comment** field visible. When checked, the is visible in the **Locked** column of the Job List.

- **Locked Comment:** Used to enter the reason in this text field for locking the job. This is a required field if the **Locked** checkbox is selected.

- **In Jeopardy**: Check this box if the job is **In Jeopardy**. When checked, this turns on the **In Jeopardy** indicator .

- **Jeopardy State:** Used to select the jeopardy reason

  NOTE: The **Jeopardy** checkbox and **In Jeopardy** reason may be auto-set due to business rules/policies that have not been met.

- **Completed Stages**: Used to enter the current stage value for the job

- **Total Stages**: Used to enter the total required stages of a job

- **Proposed Revenue**: Used to display the proposed job revenue from order or can be manually populated

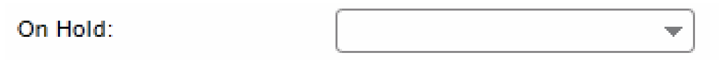
- **Actual Revenue**: Used to enter the actual job revenue

- **Summit Posted**: This box is automatically checked, when the user has indicated 'Yes' when asked 'Do you want to notify click' in Summit Scheduler. This means that Summit relevant equipment has been sent to SAP.

- **Summit Override**: This box will need to be checked, when trying to post actuals in Click and there is no Summit relevant equipment to pass from Summit Scheduler to SAP.

- **IJR**: The **Irregular Job Report** checkbox is meant to be checked when an IJR has been created for this job and indicates that job had unanticipated complications or problems.

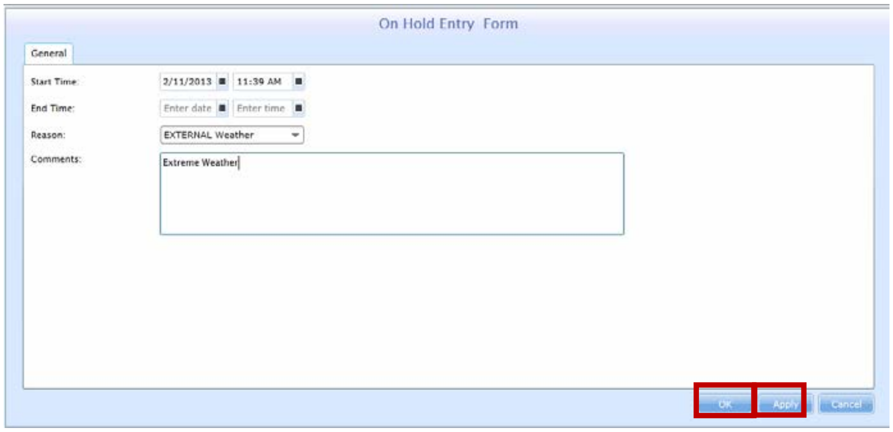
- **On Hold:** Use the drop down menu to select the appropriate entry.



- The three columns that display on the **On Hold** table are:
  - **Start**: Select the time when the hold period starts.
  - **End**: Select the time when the hold period ends.
  - **Reason**: Select the **On Hold** reason for the job.

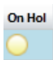
Click  button to add a new row to the **Hold Time** table. Click  to delete a selected **Hold Time** record.

NOTE: To create a new **On Hold** record you need to be in the **Job Builder View**, but you can delete **On Hold** records from **Job Builder** and **Scheduling** view table.

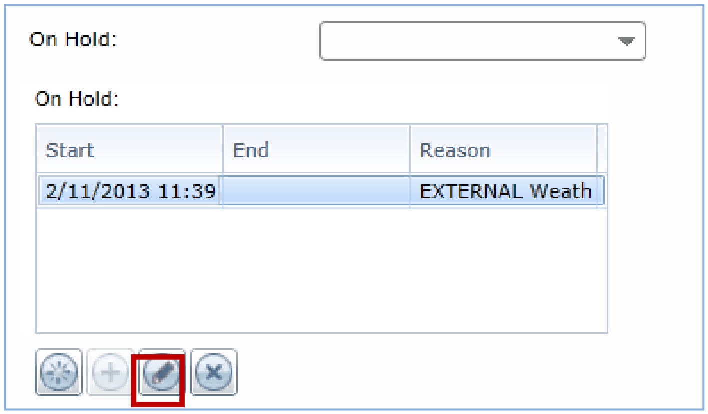


- **Start Time:** Used to select the date and time when the hold period starts
- **End Time:** Used to select the date and time when the hold period ends
- **Reason**: Used to select the **On Hold** reason for the job
- **Comments**: Free text field to describe the **On Hold** reason details

Note: Click the **Apply** button and then the **OK** button. The entry appears in the **On Hold** table.

Note: The **On Hold** 

radio button displays on the line item for the Sales Order and on the **Job List** and the **Resource Gantt**.

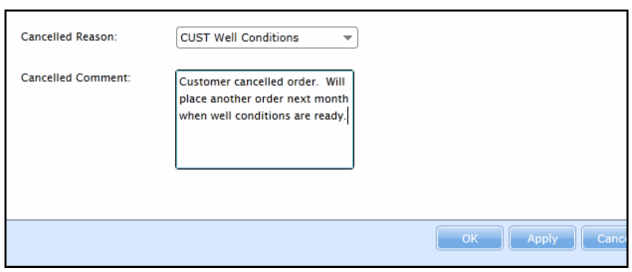


Note: To complete the **On Hold** table, click on the line item to be completed, click , enter the **End Time** fields, click the **Apply** button, and then click the **OK** button. The table is now updated and the Job is no longer **On Hold.**

Note: Click to delete a selected **Hold Time** record.

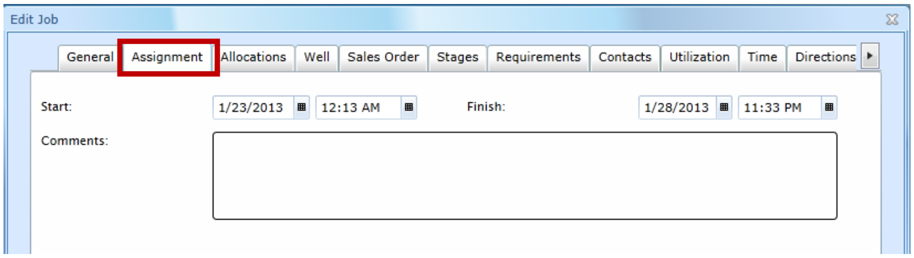
NOTE: All cancelled fields are only visible when you cancel a job.

- **Cancelled Reason**: Used to select the reason for cancelling the job. This is a required field if the **Cancelled** checkbox is selected.
- **Cancelled Comment**: Free form text used to provide additional information for the job cancellation



Note: Click the **Apply** button and a pop-up message displays. Click the **Yes** button to cancel the job. Click the **OK** button and the job status will change to **Cancelled** (Cancelled) in the **Job Builder** view and on the Job List in the **Scheduling** view.

2. Assignment Tab



NOTE: Assignment tab is only visible in the **Scheduling View** once the job has be **Assigned**

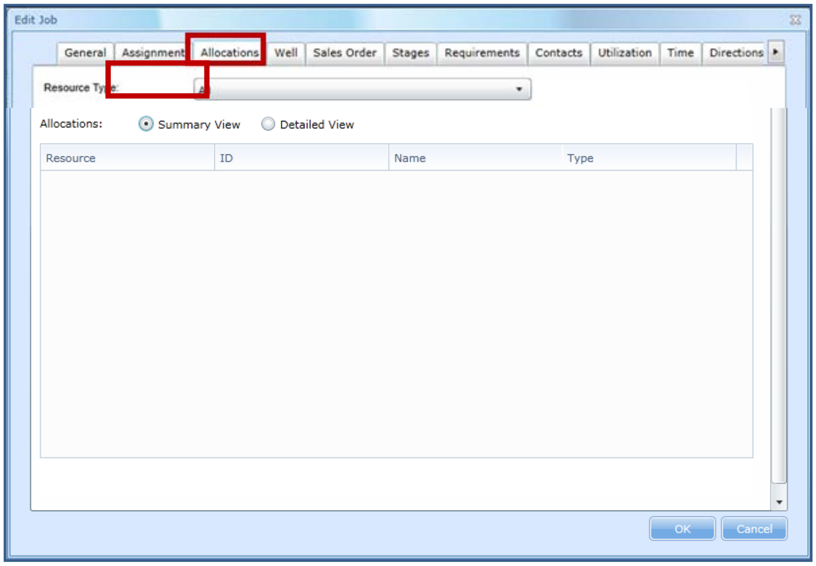
- **Start**: Displays the intended start date and time of the job (gate to gate). Populates when the job is dragged to the Gantt, but the field may be edited

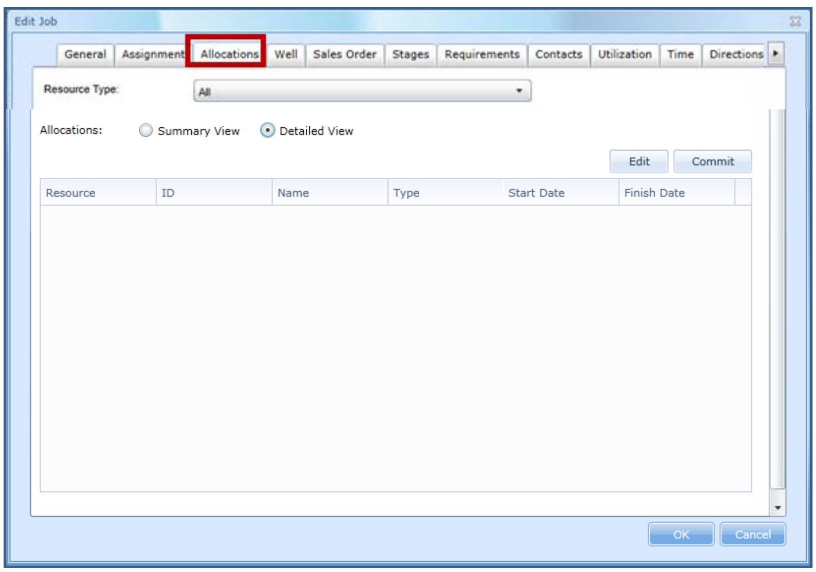
- **Finish**: Displays the intended finish date and time of the job (gate to gate). Populates when the job is dragged to the Gantt, but the field may be edited

  NOTE: The **Start Date** and **Time** is set when the job is dragged on to the **Resource Gantt** chart. After that, the start time can be edited. The finish date is adjusted in the mobile.

- **Comments**: Used to enter any comments related to the job

3. Allocations Tab





- **Resource Type**: Used to select the type of resource allocated to the job. The resources are then displayed in the **Allocations** table.

- **Allocations**: Displays the list of resources allocated to the job according to the selected value in the **Resource Type** drop-down.

  - **Summary View** : Summary list of allocations

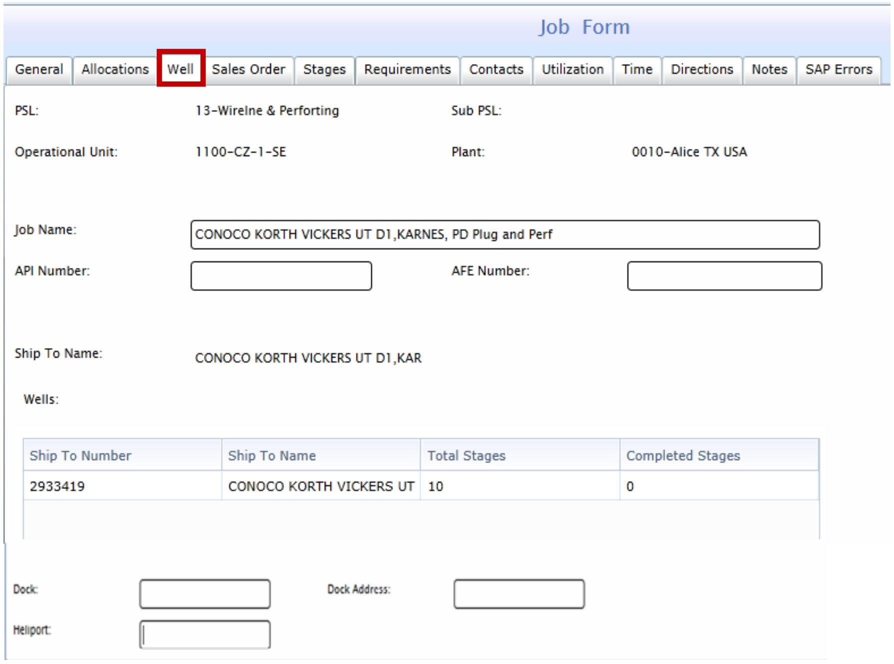
  - **Detailed View**: Detailed list of allocations and allocation times

  - **Resource**: Displays the type of resource, for example, Individual, Equipment

  - **ID**: Displays the resource unique identifier (SAP ID#)

- **Name**: Displays the name of the resource
- **Type**: Displays the title of the resource
- **Start Date:** Start date and time of allocation
- **Finish Date:** Finish date and time of allocation
- **Edit:** Button that allows user to edit the allocation for the resources
- **Commit:** Button that allows user to commit the edits made to allocations

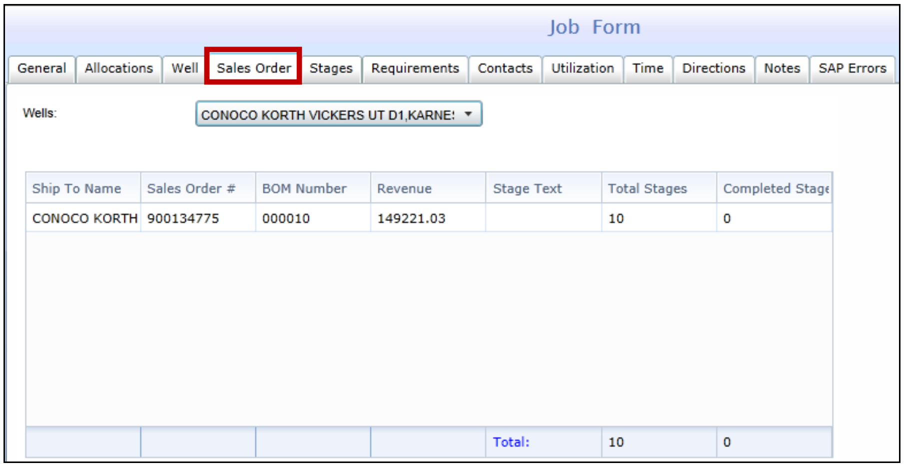
4. Well Tab



- **PSL**: Displays the Product Service Line
- **Sub PSL**: Displays a division within the primary Product Service Line
- **Operational Unit**: Displays the name of the operational unit of the job
- **Plant**: Displays the physical location to which the job is assigned
- **Job Name**: Used to enter more information pertaining to Job or Well. By default the ship to name is entered, which consists of customer name, well name, and number
- **API Number**: A unique, numeric identifier assigned to each well by the American Petroleum Institute may be entered in this field
- **AFE Number**: Used to enter the Authorization For Expenditures number of the job in this field
- **Ship To Name**: Displays the customer name, well name and number

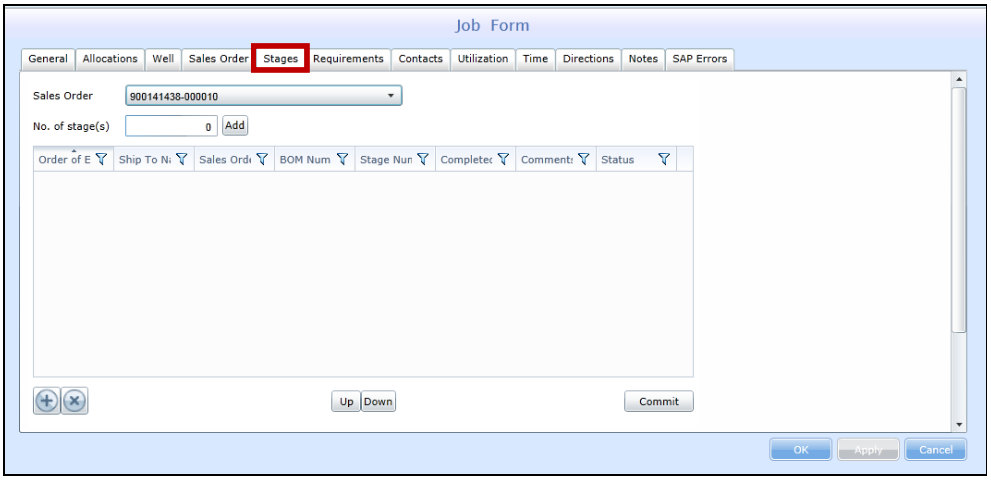
- **Wells Table**: Displays well details
  - **Ship To Number**: Displays SAP generated **Ship To** number
  - **Ship To Name**: Displays the name of the customer operating the well
  - **Total Stages**: Displays the number of stages the job comprises
  - **Completed Stages**: Displays the number of stages completed for the job
  - **Total:** Counts number of **Total Stages** and number of **Completed Stages** populated from the **Sales Order** tab
- **Dock**: Used to enter dock information
- **Dock Address**: Used to enter the dock address
- **Heliport**: Used to enter heliport information

5. Sales Order Tab



- **Wells**: Used to select the sales order/well. It will display the different ship tos
- **Sales Order Table**: Displays a list of customer or well details for the selected value of the **Wells** dropdown
  - **Ship To Name**: Displays the the customer name, well name, and number
  - **Sales Order**: Displays the sales order number for the job
  - **Revenue**: Displays the proposed revenue the job will generate
  - **Stage Text**: Contains text concerning the stages of the job
  - **Total Stages**: Displays the number of stages for the job
  - **Completed Stages**: Displays the number of completed stages for the job
  - **Total**: Counts the number of **Total Stages** and the number of **Completed Stages**

6. Stages Tab



- **Sales Order**: From the drop-down, choose the **Sales Order** in which to display the detail records in the **Stage** table.
- **No. of Stage(s)**: Used to enter the number of stages incorporated in the job
- **Add**: Click Add to automatically calculate stages
- **Stage Details Table**: Displays the details of the stages

  NOTE: Click on any of the column headers to filter the column data.

  – **Order of Execution**: Displays the execution order of the stages

  – **Ship To Name**: Displays the combination of the customer and well name

  – **Sales Order**: Displays the sales order number for the job

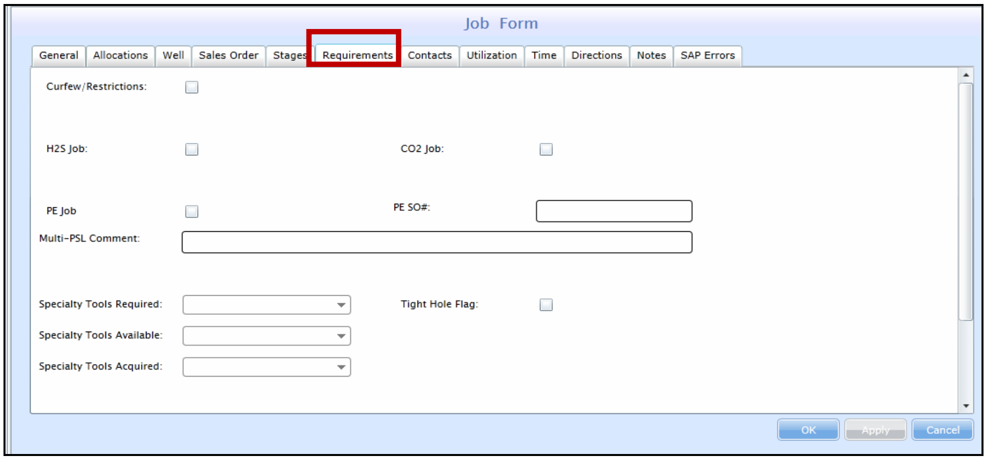
  – **Stage Number**: Displays the number of the stage

  – **Completed Date**: Displays the date the stage was completed

  – **Comments**: Displays comments concerning the associated stage

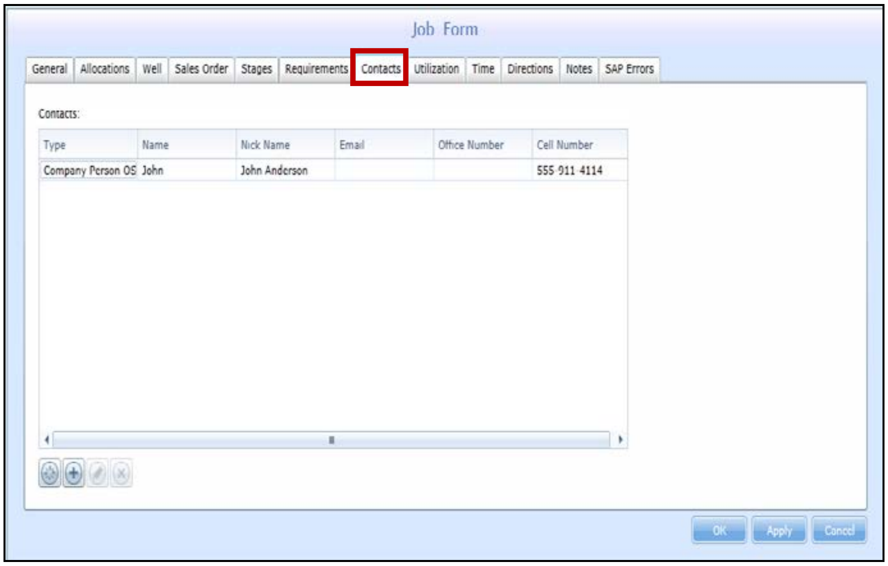
  – **Status**: Displays Completed or Skipped based on entry from mobile
- **Add**: Click to insert another row into the **Stages** table.
- **Delete**: Click to remove a selected row in the **Stages** table.
- **Up**: Click Up to move the selected row up in the **Stages** table.
- **Down**: Click Down to move the selected row down in the **Stages** table.
- **Commit**: Click Commit to save the layout of the **Stages** table.

7. Requirements Tab



- **Curfew/Restriction**: Check this box if there are curfew restrictions
- **Restriction Comments**: Field appears when Curfew/Restriction box is checked. Free form text to add comments regarding restrictions
- **H2S Job**: Check this box if the job is a HS2 job
- **CO2 Job**: Check this box if CO2 is required for this job
- **PE Job**: Mark this checkbox if the job is supporting Production Enhancement
- **PE SO #**: Used to enter the Production Enhancement sales order number
- **Multi PSL Comment**: Used to enter comments regarding any of the Product Service Lines the job is supporting
- **Specialty Tools Required**: Select from the drop down menu if specialty tools are required for the job
- **Tight Hole Flag**: Used if there is resistance within sections of the wellbore
- **Specialty Tools Available**: Select from the drop down menu if specialty tools are available
- **Specialty Tools Acquired**: Select from the drop down menu if specialty tools have been obtained
- **Certifications**: Mark this checkbox if any certifications are required for the job
- **Training**: Mark this checkbox if any training is required for this job
- **Comments**: Used to enter any comments regarding certifications, training or any other special skill sets

8. Contact Tab

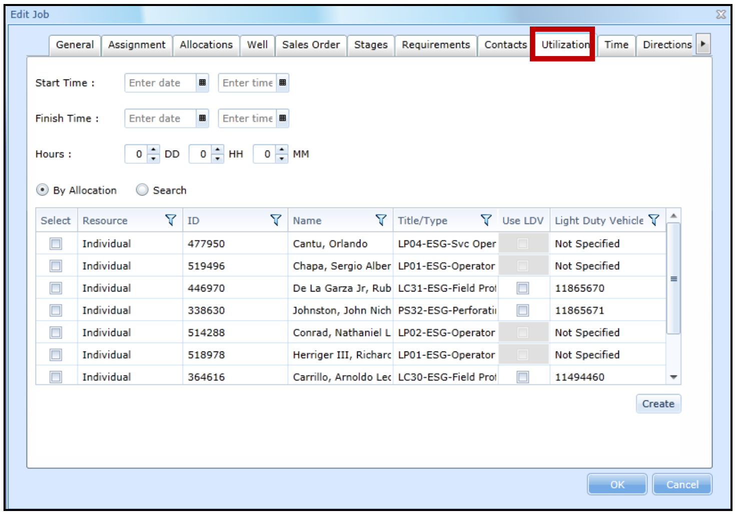


- **Contacts**: Displays a list of contacts associated with the job
  - **Type**: Displays the contact type
  - **Name**: Displays the first name of the contact
  - **Nick Name**: Displays a nick name for the contact
  - **Email**: Displays the email address for the contact
  - **Office Number**: Displays the office telephone number for the contact
  - **Cell Number**: Displays the mobile telephone number for the contact
- **Add Contacts**: To insert a contact details row in the **Contacts** table click . The **Contacts Search** form is displayed. Search for, and then select the desired contacts by marking the appropriate checkboxes in the form. When completed, click the **OK** button.

  NOTE: New **Contact** records are created in the **Job Builder** view. Click button to create a new contact record

- **Delete Contacts**: Click button to delete a contact from the **Contacts** table. When completed, click the **OK** button.

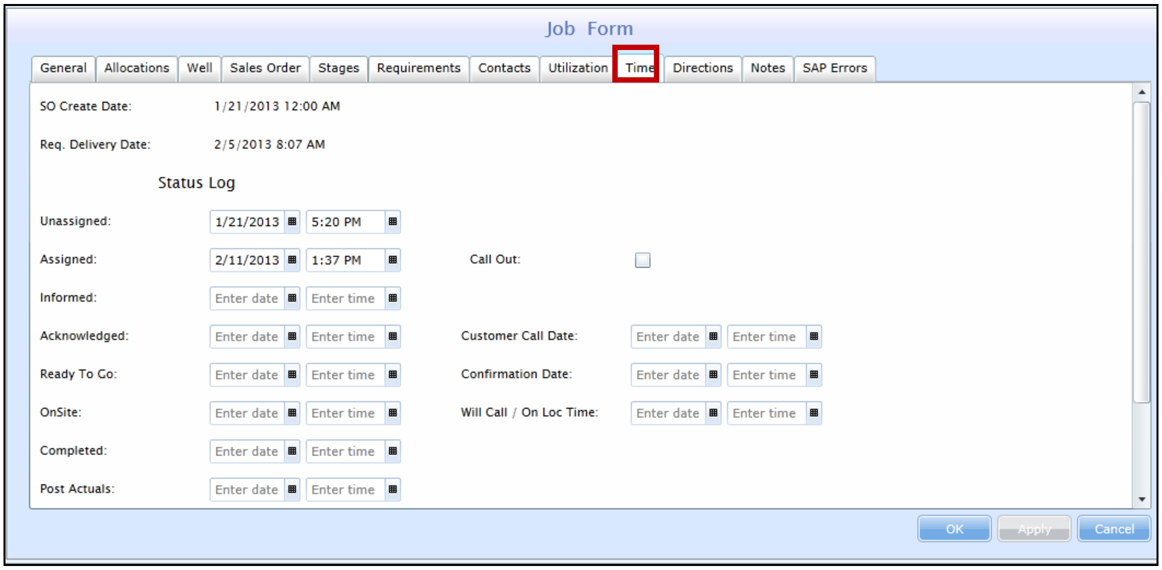
9. Utilization Tab



This tab is used to create Halliburton Resource Utilization records which can be viewed in the **Resource Utilization View**.

NOTE: See **Create Utilization Records** Quick Reference Card for how to create utilization records.

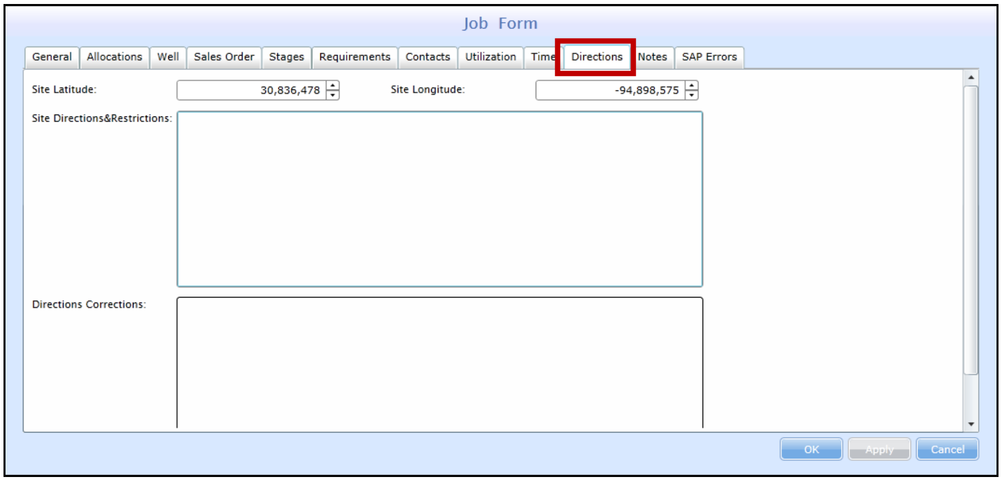
10. Time Tab



- **SO Create Date**: Displays the sales order creation date
- **Req Delivery Date**: Displays the requested delivery date and time of the job. This date comes from the sales order.
- **Status Log**: It is a time stamp when the statuses are changed either through ClickSchedule or Job Details. These fields can be manually changed, if necessary.
- **Unassigned**: The job has come over from SAP but the Scheduler has not assigned the job to a crew
- **Assigned**: The job has been assigned to a crew
- **Informed**: The job has been sent to Job Details
- **Acknowledgment**: The job has been acknowledged
- **Ready To Go**: Ready to leave the yard
- **On Site**: Crew is on site at the customers location
- **Completed**: Indicates the job has been completed and the crew has left the site
- **Post Actuals**: Partial and final post actuals has been performed and SAP has confirmed records posted, a “C” status, in SAP.
- **Rejected**: Date and time stamp for a job that has been rejected in SAP. Status in ClickSchedule is recorded.
- **Cancelled**: Date and time stamp for a job that has been cancelled in ClickSchedule

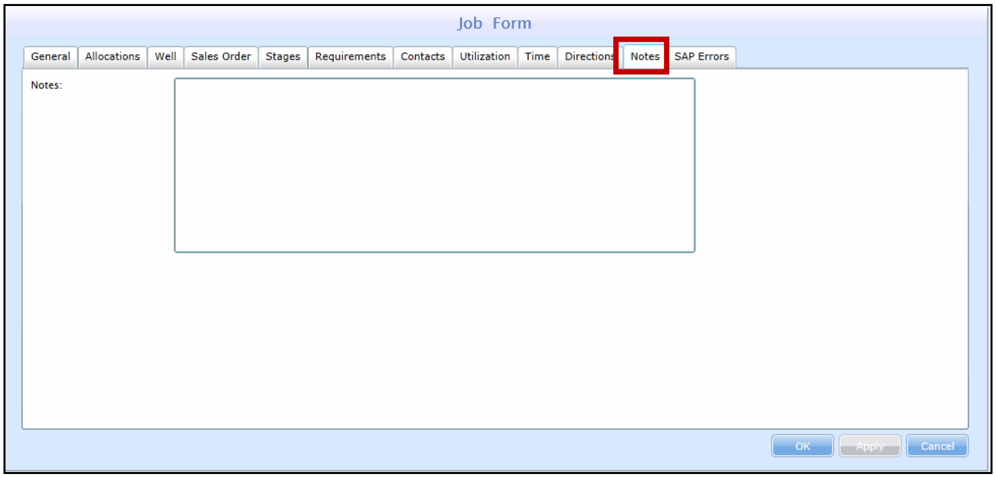
- **Call Out**: Mark this checkbox if a job is spontaneous or a customer calls with a job
- **Customer Called Date**: Use to enter the date the customer called
- **Confirmation Date**: Used to enter the confirmation date
- **Will Call/On Loc Time Ready**: Use to enter the date by which **Will Call** is due

11. Directions Tab



- **Site Latitude**: Default latitude information of the Ship to location
- **Site Longitude**: Default longitude information of the ship to location
- **Site Directions & Restrictions**: Used to enter the directions to and restrictions for the site
- **Direction Corrections**: Used to enter any change in the directions – road closures, etc. This is populated from any corrections sent by Job Details

12. Notes Tab



- **Notes**: Free form text used to enter any job-related notes. This information is transmitted to Job Details users.

13. SAP Errors

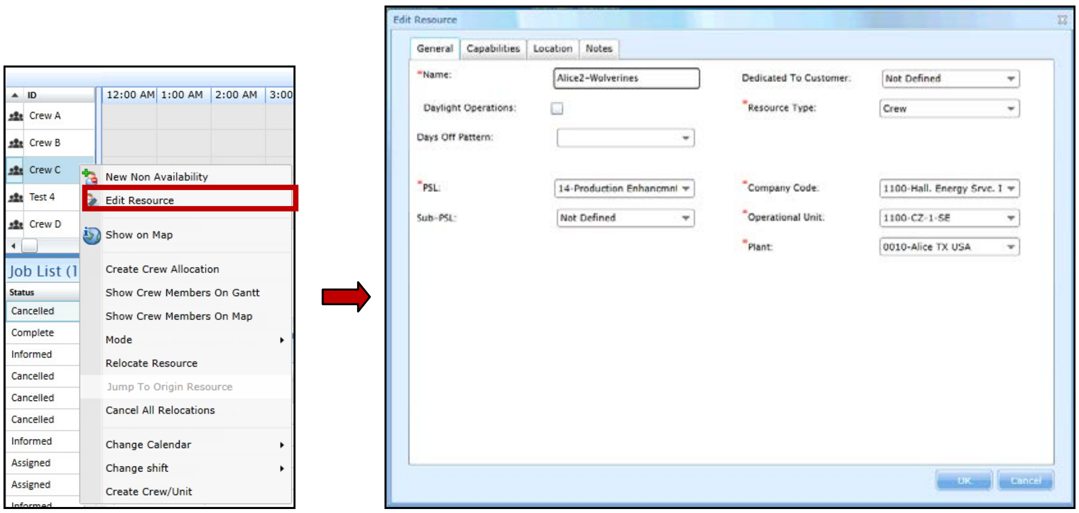
- **SAP Completion Failures**: SAP errors display in this box in the event that **Partial Post Actuals** fails. The type of SAP errors will be described.

Edit Resource (Crew) Form

The **Edit Resource (Crew)** form holds all the relevant properties for a crew. The Schedulers view and edit the resource's information using this form.

To view/edit the **Edit Resource (Crew)** form:

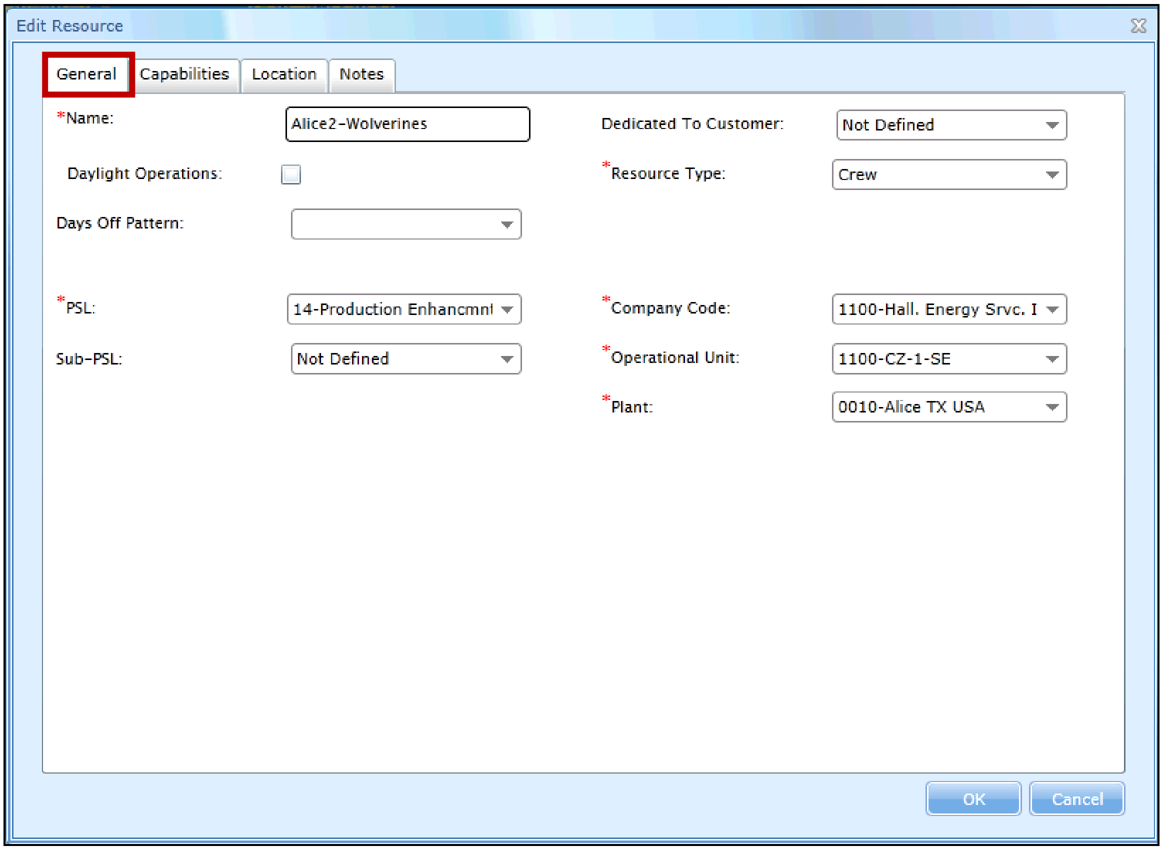
13. From within the Resource Gantt, right-click the required crew. A list of options displays.
14. Select the **Edit Resource** option. The **Edit Resource** form displays.



Note: You can also double-click any crew to display the **Edit Resource** form.

The tabs displayed on the **Edit Resource** form for a crew are:

1. General Tab



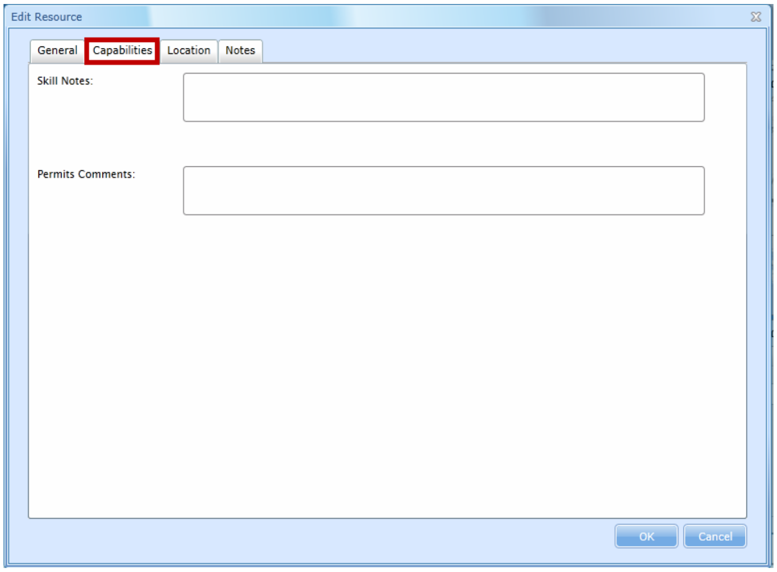
- **Name**: Name of the crew
- **Dedicated to Customer**: If this crew is dedicated to a customer, select the customer from this drop-down list.

  Note: A Crew that is dedicated can still catch jobs for other customers.
- **Daylight Operations**: Select this checkbox to indicate if the crew needs to work in daylight operations
- ***Resource Type**: Displays resource type as **Crew**
- **Days Off Pattern**: Used to set the working pattern of the crew
- ***PSL**: Used to select the name of the Product Service Line (PSL) of the crew
- ***Company Code**: Used to select the company code of the crew
- **Sub-PSL**: Used to select the name of the sub-PSL of the crew
- ***Operational Unit**: Used to select the name of the area of the crew

- ***Plant**: Used to select the name of the Plant of the crew

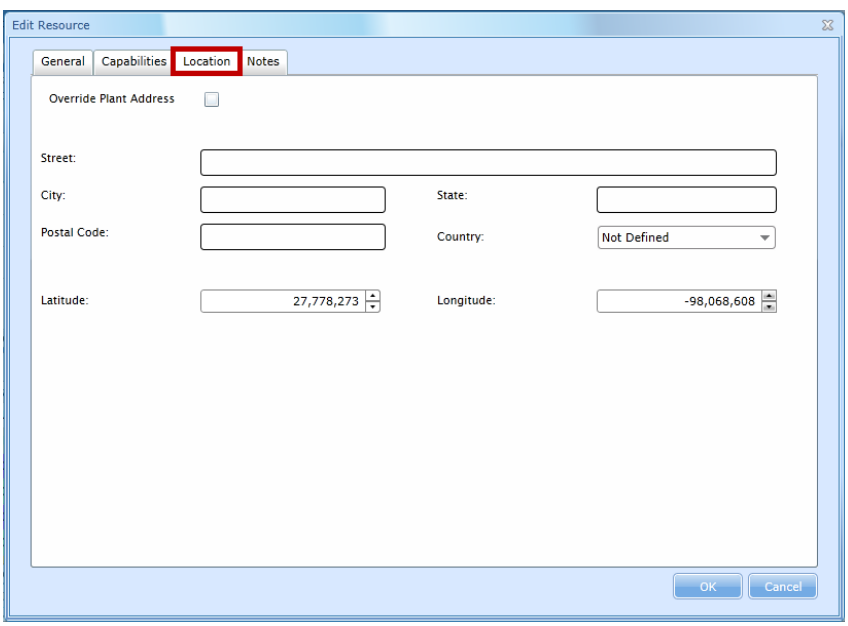
Note: All the fields marked with an asterisk (*) are required fields.

2. Capabilities Tab



- **Skill Notes**: Used to enter notes regarding the crew's specific crew skills
- **Permit Comments**: Used to enter information regarding the crew's permits

3. Locations Tab

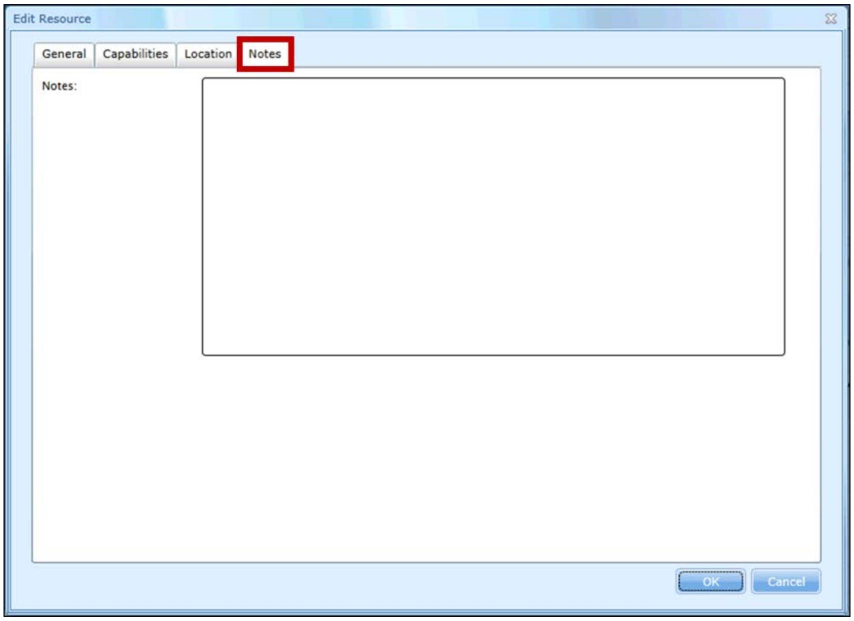


- **Override Plant Address**: Select this checkbox to override the current Plant address of the crew

Note: This field is for Click only – it does not flow back to SAP.

- **Street**: Used to enter the street address of the crew's location
- **City**: Used to enter the city for the crew
- **State**: Used to enter the state for the crew
- **Postcode**: Used to enter the postcode of the area for the crew
- **Country:** Used to enter the country for the crew
- **Latitude**: The crew's default latitude; can be changed by the user
- **Longitude**: The crew's default longitude; can be changed by the user

4. Notes Tab



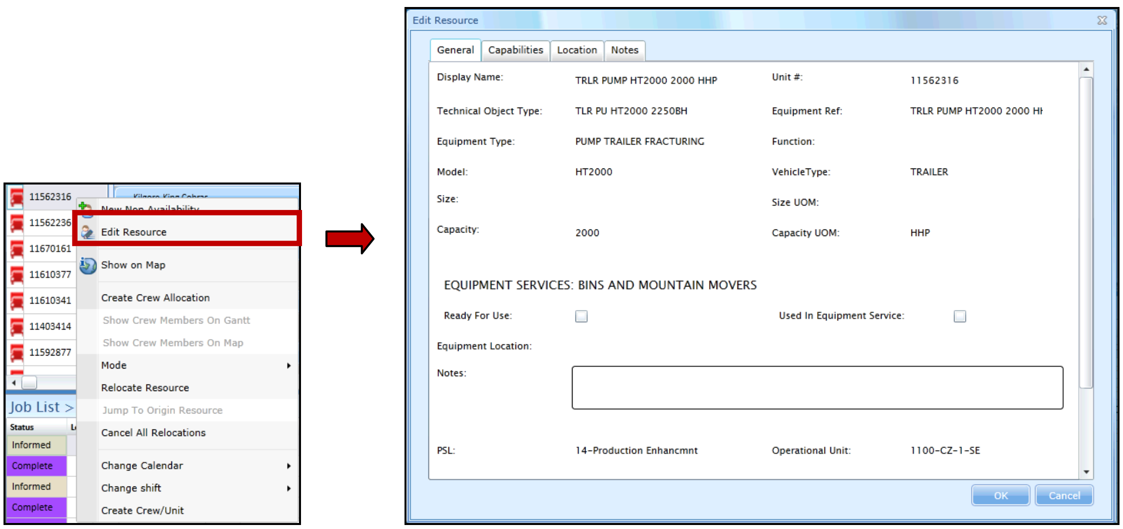
- **Notes**: Used to enter any notes related to the crew

Edit Resource (Equipment) Form

The **Edit Resource (Equipment)** form holds all the relevant properties for a piece of equipment. From the **Scheduling** view, edit the equipment resource information using this form.

To view/edit the **Edit Resource** (**Equipment**) form:

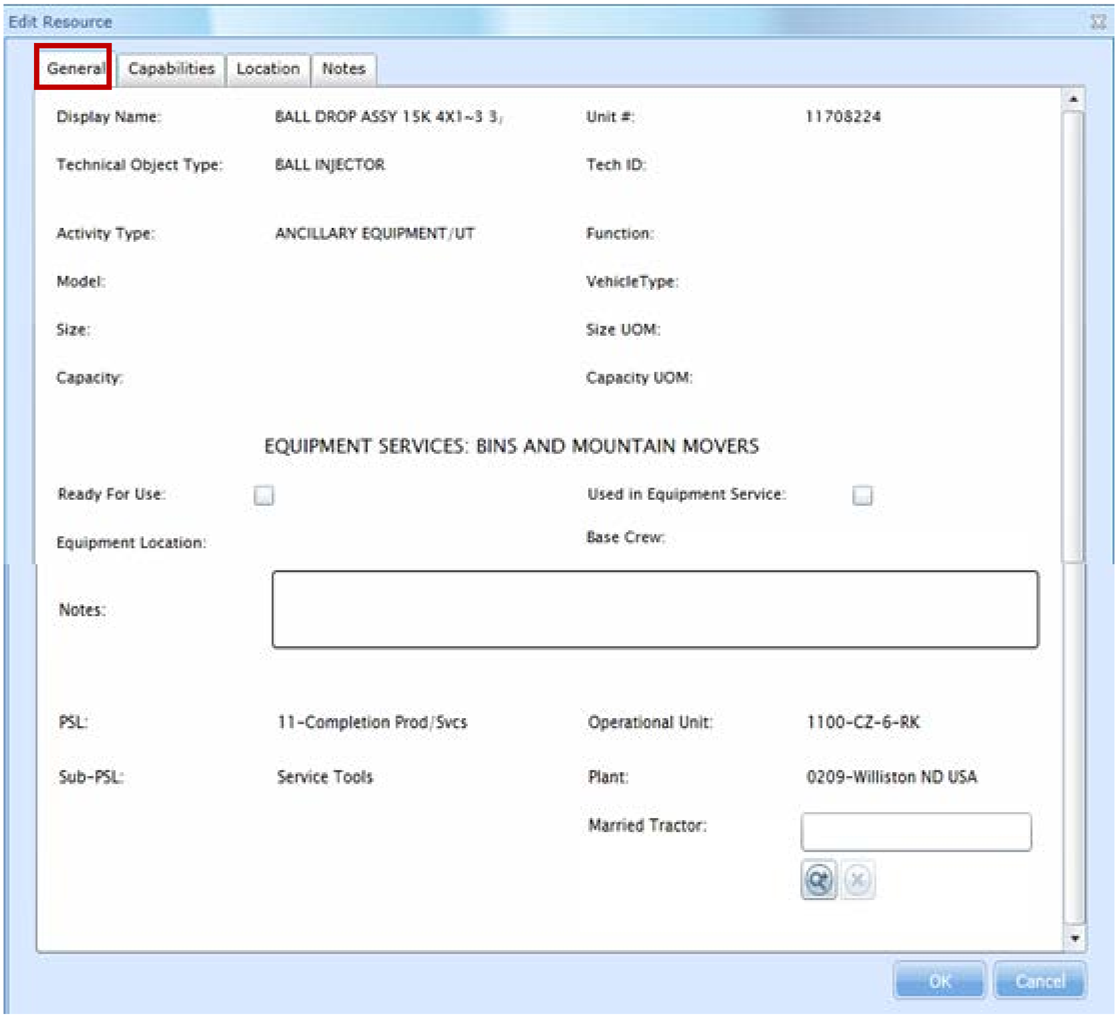
15. From within the **Resource Gantt**, right-click the required equipment. A menu of options displays.
16. Select the **Edit Resource** option. The **Edit Resource** form displays.



Note: You can also double-click the equipment row from within the Resource Gantt to display the **Edit Resource (Equipment)** form.

The tabs displayed on the **Edit Resource (Equipment)** form are:

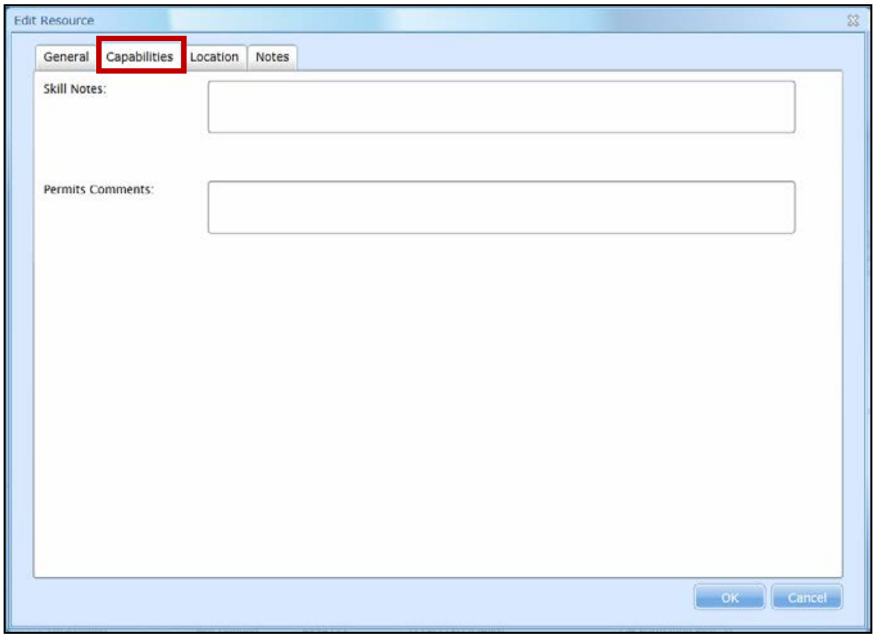
1. General Tab



- **Display Name**: Displays the name of the equipment
- **Unit #**: Displays the unit number assigned to the equipment
- **Technical Object Type**: Displays the technical object type assigned to the equipment
- **Tech ID:** Displays the technical **Identification** number assigned to the equipment
- **Equipment Ref**: Displays the equipment reference
- **Equipment Type:** Displays the type of equipment
- **Function**: Displays the equipment's function
- **Model**: Displays the equipment model

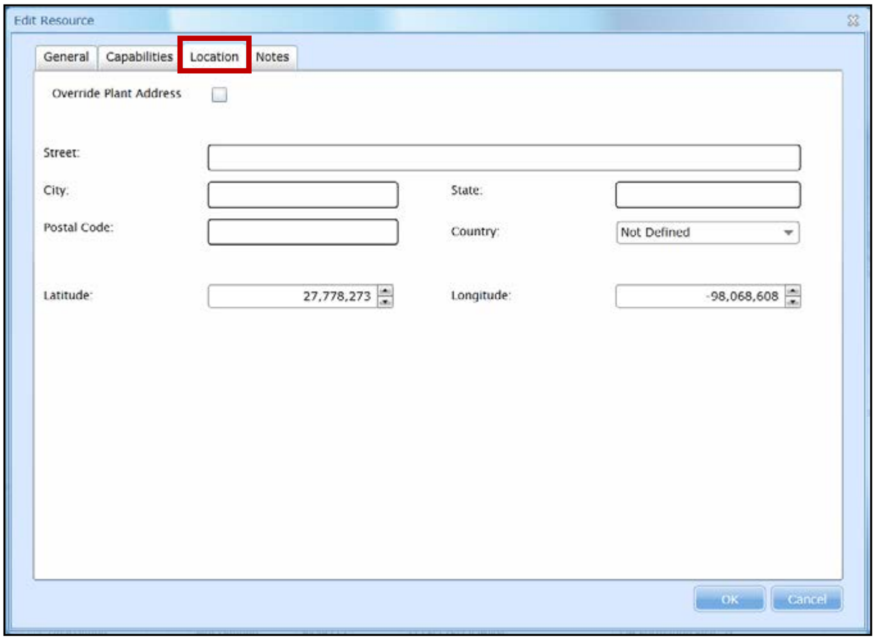
- **Vehicle Type**: Displays the type of vehicle
- **Size**: Displays the size of the equipment
- **Size UOM**: Displays the equipment's size in units of measurement
- **Capacity**: Displays the equipment's capacity
- **Capacity UOM**: Displays the capacity unit of measurement
- **Ready for Use**: This checkbox is marked if the equipment is ready to use
- **Used in Equipment Service**: If this checkbox is marked, Bins (Cementing) and Mountain Movers (PE) become a parameter in the search filters
- **Equipment Location**: Displays the location of equipment
- **Base Crew:** The base crew to which the equipment is allocated
- **Notes**: Used to enter notes pertaining to the piece of equipment
- **PSL**: Displays the Product Service Line (PSL) to which the equipment belongs
- **Operational Unit**: Displays the operational area to which the equipment belongs
- **Sub-PSL**: Displays the division within the PSL to which the equipment belongs
- **Plant**: Displays the plant to which the equipment belongs
- **Marriage Tractor:** Field to assign and display the marriage of a tractor to a trailer

2. Capabilities Tab



- **Skill Notes**: Used to enter any notes pertaining to any particular skills necessary for the operation of the equipment
- **Permits Comments:** Used to enter any notes pertaining appropriate permits required to operate the equipment

3. Location Tab

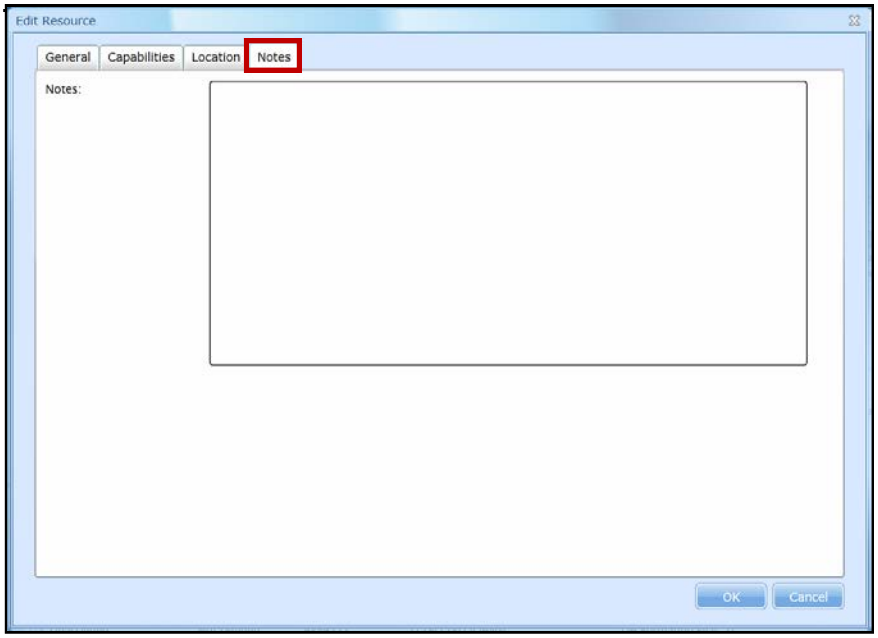


- **Override Plant Address**: Check this box to override the current plant address of the equipment.This information does not override the information in SAP; instead, it is for ClickSchedule purposes only.

  Note: Use the following fields only in the event the **Override Plant Address** checkbox is marked.

  - **Street**: Used to enter the street address of the equipment
  - **City**: Used to enter the city for the equipment
  - **State**: Used to enter the state for the equipment
  - **Postal Code**: Used to enter the postcode of the area for the equipment
  - **Country**: Used to enter the country where the equipment is located
  - **Latitude**: The equipment's default latitude; Can be changed by the user
  - **Longitude**: The equipment's default longitude; Can be changed by the user

4. **Notes Tab**



- **Notes:** Used to enter any notes related to the equipment

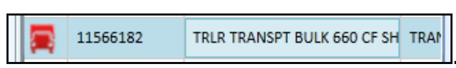
Step Instructions to Marry Tractor to Trailer:

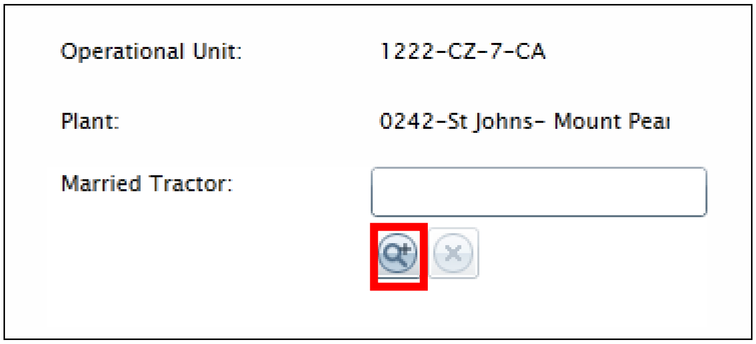
Use these steps to marry a tractor to a trailer. By marrying the tractor to the trailer, the tractor and the trailer will be allocated together when allocated to a crew.

Tractor: The piece of equipment used to pull a trailer
Trailer: The piece of equipment hauled by a trailer; it can be dropped at a location

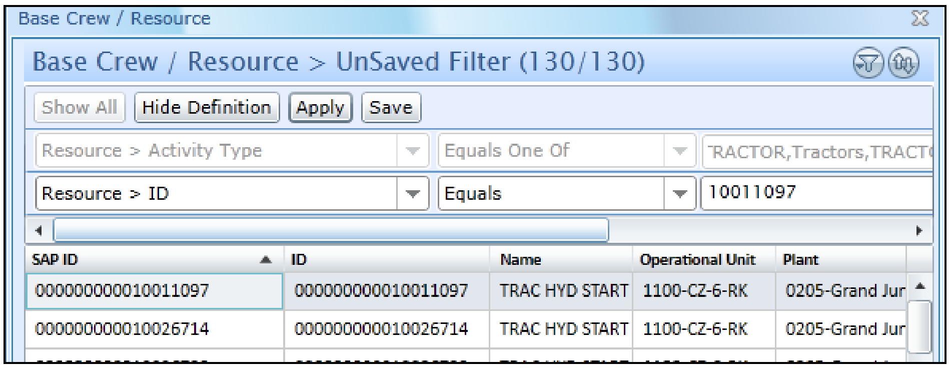
Pre-requisite:

Equipment must be part of the data load in the **Scheduling View**.

1. Locate the trailer in the **Scheduling View**  .
2. Double-click the Equipment Record on the Resource Gantt list to display the **Equipment Resource** form.
3. Use the scroll bar on the right to scroll to the bottom of the form to find the field, **Married Tractor**.



4. Click the **Search icon**, , to search for the trailer to be married to the tractor.
5. A **Base Crew / Resource** list displays.



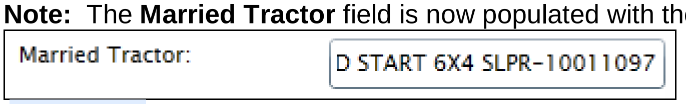
Note: The **Resource >Activity Type** is a mandatory condition and is already applied.

6. Add another filter, **Recourse>ID** to enter the ID number of the tractor.

7. Click the correct line item and it will highlight the line for the item number requested

8. Click OK .

Note: The **Married Tractor** field is now populated with the selected trailer.



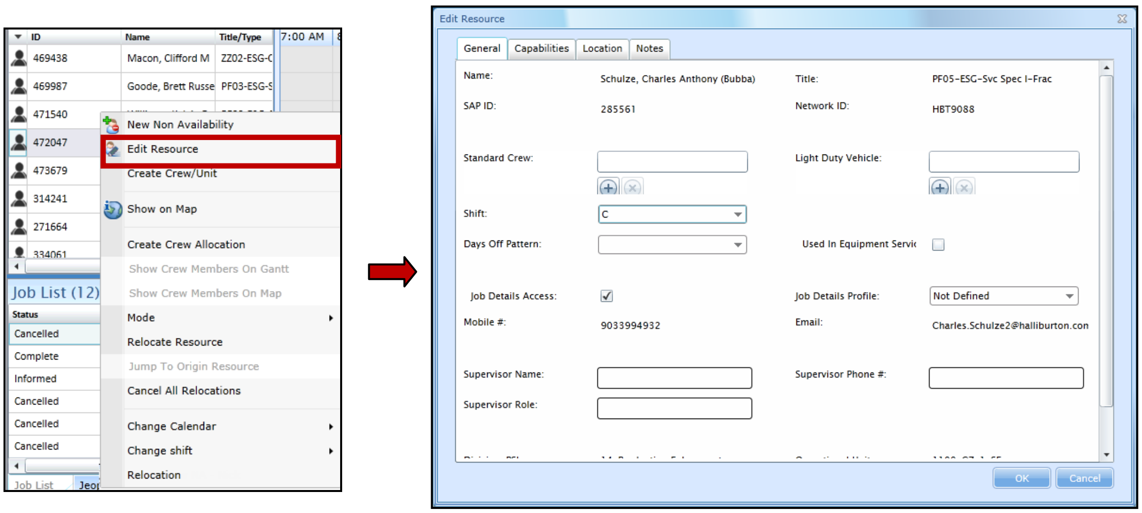
9. Click OK to complete the task.

Edit Resource (Individual) Form

The **Edit Resource (Individual)** form holds all the relevant properties for an individual. The Schedulers view and edit the resource's information using this form.

To edit/view the **Edit Resource (Individual)** form:

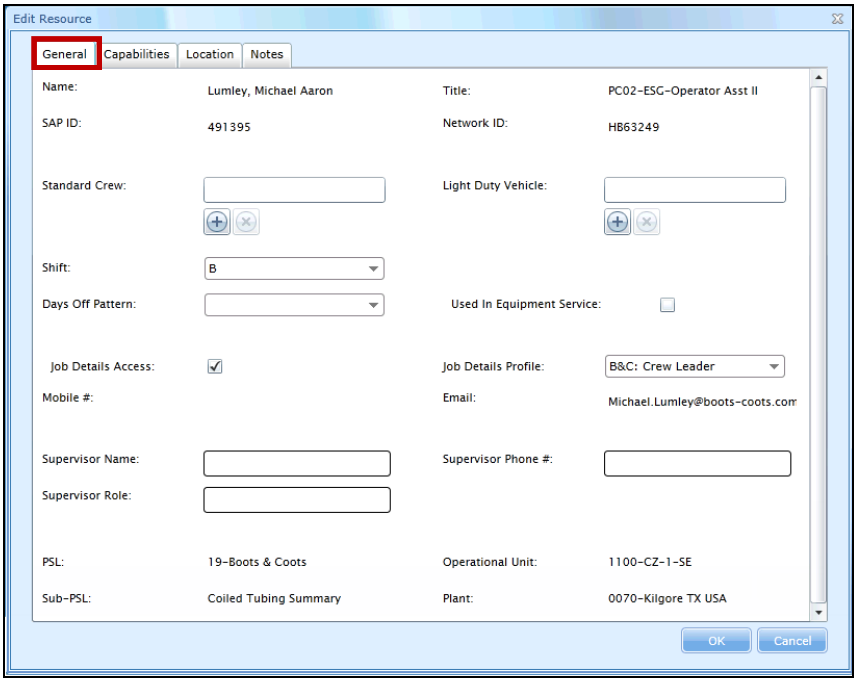
1. From within the Resource Gantt, right-click the required individual. A list of options displays.
2. Select the **Edit Resource** option. The **Edit Resource** form displays.



Note: You can also double-click any individual to display the **Edit Resource** form.

The tabs displayed on the **Edit Resource (Individual)** form are:

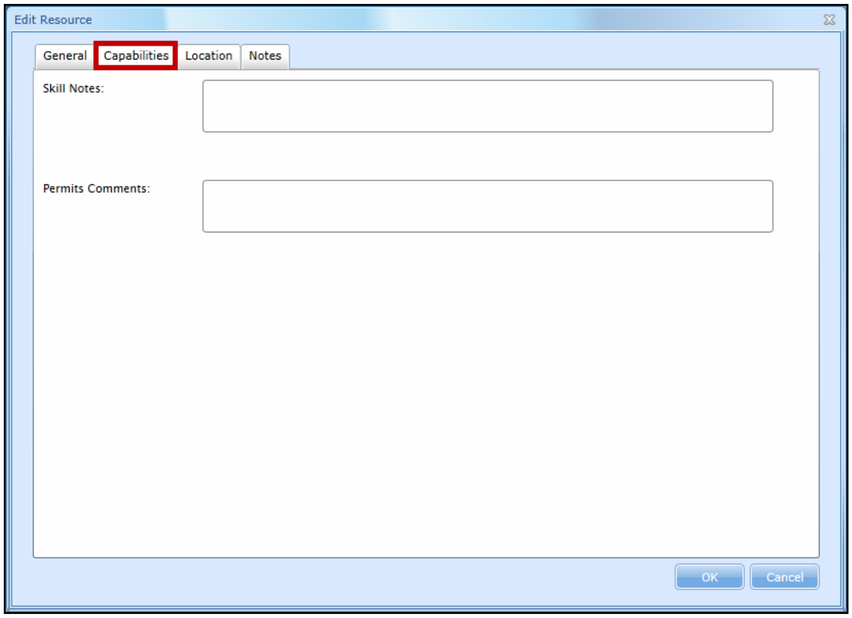
1. General Tab



- **Name**: Name of the individual (this pulls from SAP and cannot be changed in the form)
- **Title**: Title of the individual (this pulls from SAP and cannot be changed in the form)
- **SAP ID**: SAP ID of the individual (this pulls from SAP and cannot be changed in the form)
- **Network ID**: Individual's Halliburton ID (this pulls from SAP and cannot be changed in the form)
- **Standard Crew**: Used to select the standard crew to which the individual is allocated
- **Light Duty Vehicle**: Used to select the vehicle to which the individual is assigned
- **Shift**: Used to assign the shift for the individual
- **Days Off Pattern**: Used to select the working pattern
- **Used in Equipment Service**: Select this checkbox if the individual is used in equipment service
- **Job Details Access**: Select this checkbox if the individual has access to the Job Details application

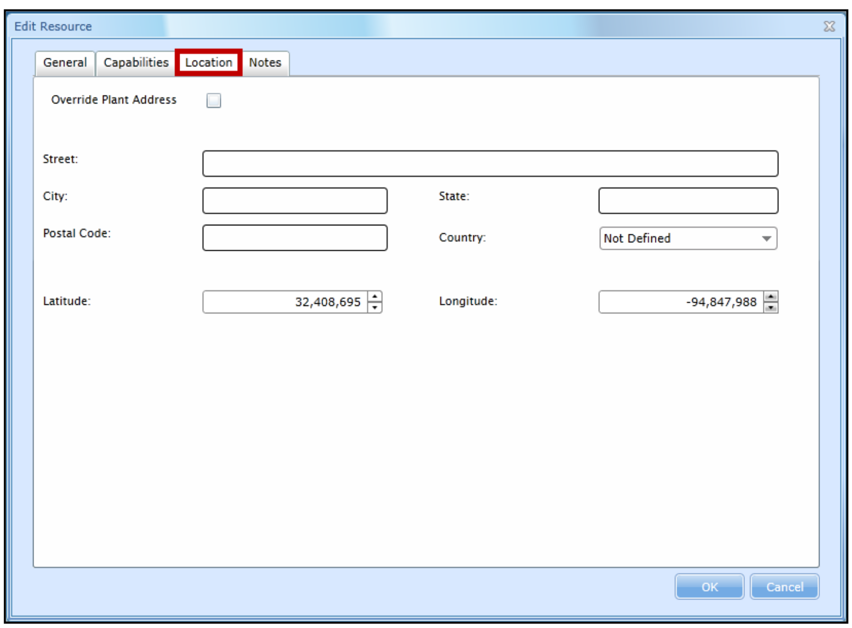
- **Job Details Profile**: Used to select the individual's Job Details profile (i.e., whether they have edit or read-only access)
- **Mobile #**: Mobile number for the individual
- **Email**: Email address for the individual
- **Supervisor Name**: Used to enter the name of the individual's supervisor
- **Supervisor Phone #**: Used to enter the phone number of the individual's supervisor
- **Supervisor Role**: Used to enter the supervisor's role
- **PSL**: Displays the Product Service Line (PSL) to which the individual is assigned
- **Operational Unit**: Displays the area to which the individual is assigned
- **Sub-PSL**: Displays the sub-PSL to which the individual belongs
- **Plant:** Plant to which the individual is assigned

2. Capabilities Tab



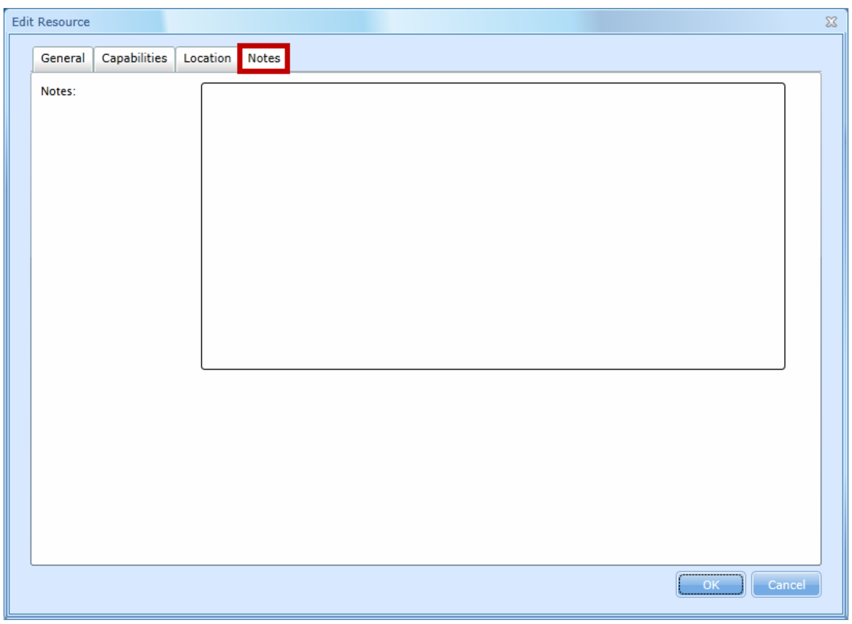
- **Skill Notes**: Used to enter notes surrounding the individual's specialized work skills
- **Permits**: Used to enter comments regarding any specialty permit(s) the individual holds

3. Locations Tab



- **Override Plant Address**: Check this box to override the current Plant address of an individual
- **Street**: Used to enter the street address information
- **City**: Used to enter the city
- **State**: Used to enter the state
- **Postcode**: Used to the postcode of the area
- **Country:** Used to enter the country
- **Latitude**: Default latitude information for the individual; can be changed by user
- **Longitude**: Default longitude information for the individual; can be changed by user

4. Notes Tab



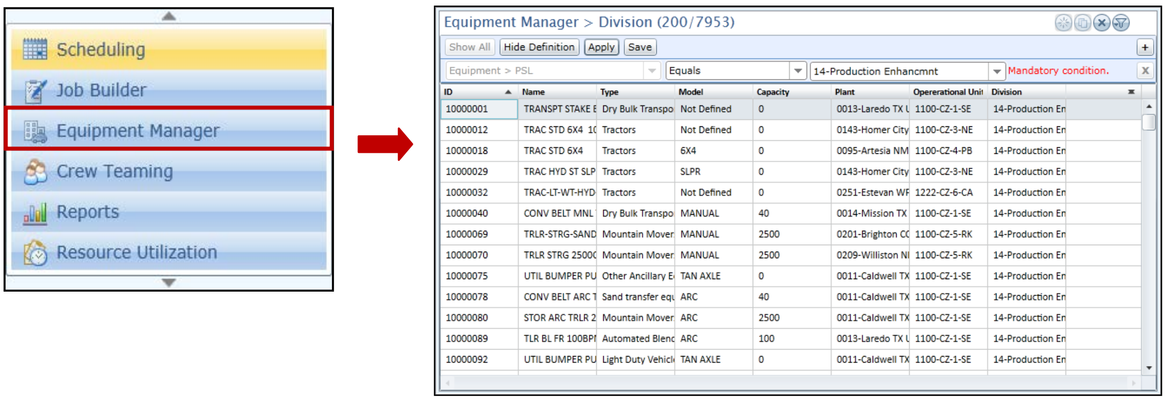
- **Notes**: Used to enter any notes related to the individual

Equipment Manager View

Equipment Manager View allows the user to view equipment based upon user-defined filters.

Note: The **Equipment Manager** shows both Schedulable and Non-schedulable equipment; whereas, the Scheduling View shows only Schedulable equipment on the Resource Gantt.

To display the **Equipment Manager** table, click the **Equipment Manager** View from the **View list**.

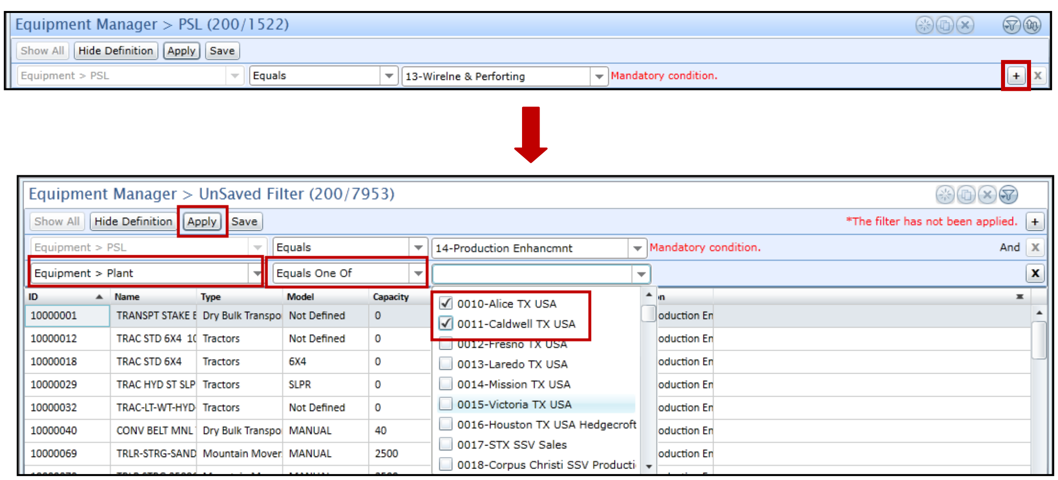


Filters are used to create subsets of equipment data. By default, the equipment list is filtered by the Product Service Line (PSL) loaded in the **Business Hierarchy**.

You can create and further refine views of equipment matching your specified criteria by adding additional filters. The resulting subset will show only the types of equipment you wish to see.

For instance, you can view only equipmeat belongs to specific plants or locations within a PSL as in the following example:

1. Click + to add a new filter.



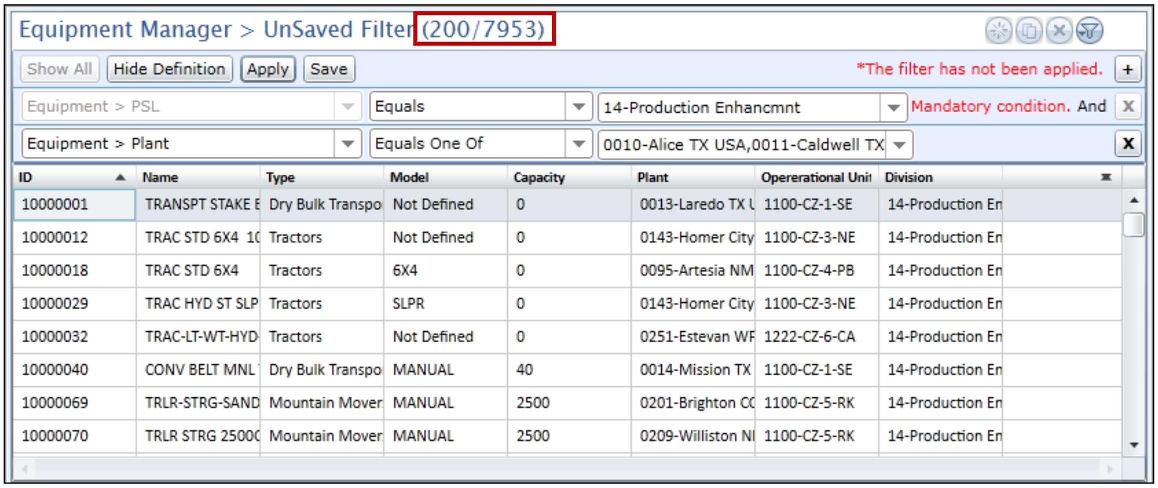
2. From the first dropdown list, select the **Equipment** > **Plant** parameter.

3. From the middle dropdown list, select the **Equals One Of** condition.
4. From the last dropdown list, select the search criteria to be matched. In this example, Alice and Caldwell.

5. Click Apply icon to apply the additional filter search.

The filter displayed will request to show all equipment that belongs to **Production Enhancement** for plants **Alice** 0010 and **Caldwell** 0011.

Note that the title bar shows that 200 of 7953 pieces of equipment match the filter’s criterion.



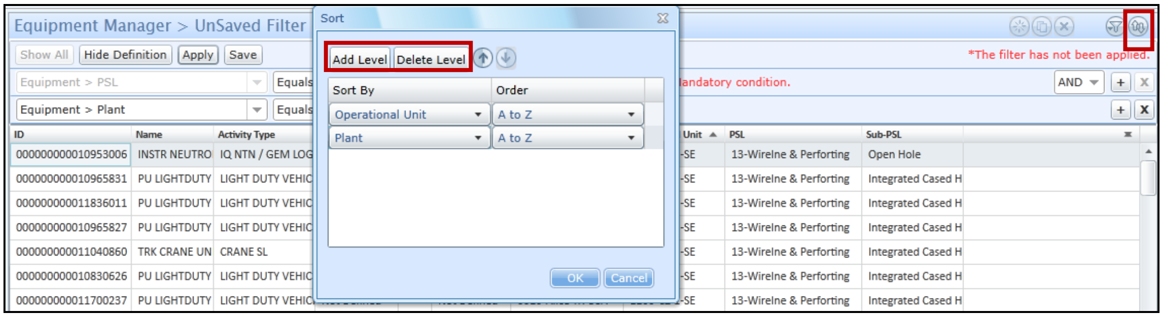
ID	Name	Type	Model	Capacity	Plant	Opererational Unit	Division
10000001	TRANSPT STAKE E	Dry Bulk Transpo	Not Defined	0	0013-Laredo TX L	1100-CZ-1-SE	14-Production En
10000012	TRAC STD 6X4 1(	Tractors	Not Defined	0	0143-Homer City	1100-CZ-3-NE	14-Production En
10000018	TRAC STD 6X4	Tractors	6X4	0	0095-Artesia NM	1100-CZ-4-PB	14-Production En
10000029	TRAC HYD ST SLP	Tractors	SLPR	0	0143-Homer City	1100-CZ-3-NE	14-Production En
10000032	TRAC-LT-WT-HYD-	Tractors	Not Defined	0	0251-Estevan WF	1222-CZ-6-CA	14-Production En
10000040	CONV BELT MNL	Dry Bulk Transpo	MANUAL	40	0014-Mission TX	1100-CZ-1-SE	14-Production En
10000069	TRLR-STRG-SAND	Mountain Mover	MANUAL	2500	0201-Brighton CC	1100-CZ-5-RK	14-Production En
10000070	TRLR STRG 2500(	Mountain Mover	MANUAL	2500	0209-Williston NI	1100-CZ-5-RK	14-Production En

The following columns are displayed for the table of equipment in the **Equipment Manager** view:

1. **ID**: Unique identifier assigned to each piece of equipment
2. **Name**: Name of the equipment
3. **Type**: Type of equipment
4. **Model**: Model of the equipment (automated, manual, etc.)
5. **Capacity**: Capacity of the equipment
6. **Plant**: Plant to which the equipment belongs
7. **Operational Unit**: Operational Unit to which the equipment belongs
8. **Division:** Division to the PSL the equipment belongs to belongs

Optional Feature from Equipment Manager View

The Equipment Manager View can further be sorted by specified sort parameters by clicking on the SORT  icon. A table will appear to Add/Delete additional sort levels to further sort the Equipment, as well as to display the Equipment in the table in either ascending or descending order.



Helpful Notes:

- Right-click and choose **Edit** or double-click a row to display the **Asset** form for the selected piece of equipment.
- Drag columns left or right to rearrange the manner in which the equipment list is displayed.
- Click on any of the column headers to sort the column in ascending or descending order.
- To further narrow the equipment result set, add additional filters and/or use the Sort icon functionality.

Extend a Job and Resource Allocations

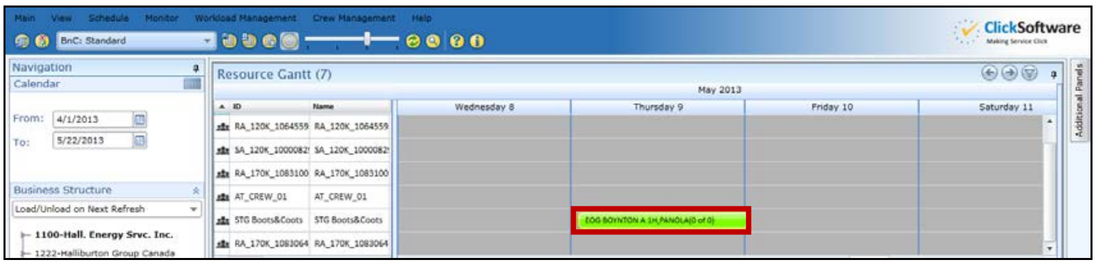
In the event a scheduled job needs to be extended, both the Job Date and Time will need to be extended, as well as the allocations assigned to the Crew for the duration of the extended job.

Use the following steps to extend the scheduled job.

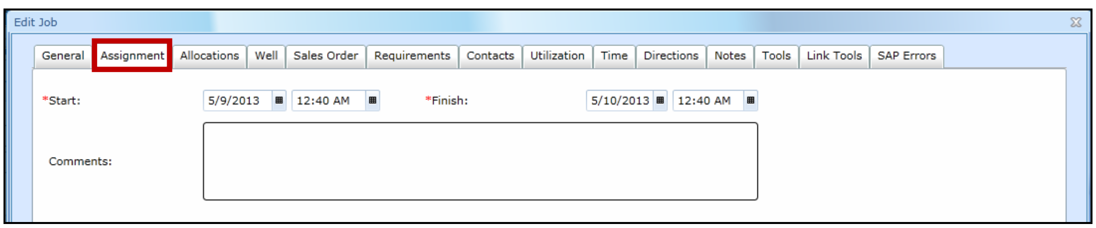
1. Load the required data in ClickSchedule.

Note: If needed, review the **Loading Data QRC**.

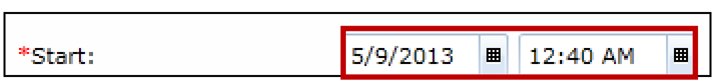
2. In the **Scheduling** view, double-click on the Job. The **Edit Job Form** opens.



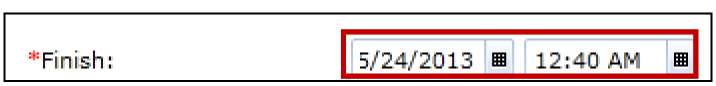
3. Click the **Assignment** tab in the **Edit Job form**.



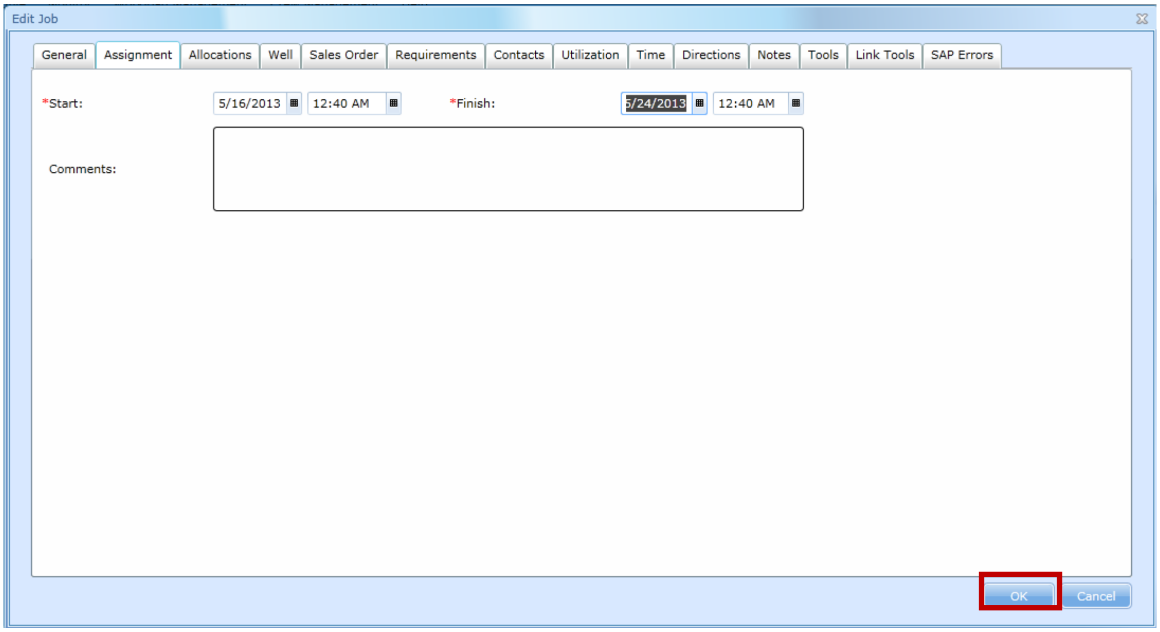
4. Update the **Start Date and Time** in the **Start** field by clicking the **Calendar** icon.



5. Update the **Finish Date and Time** in the **Finish** field by clicking the **Calendar** icon.

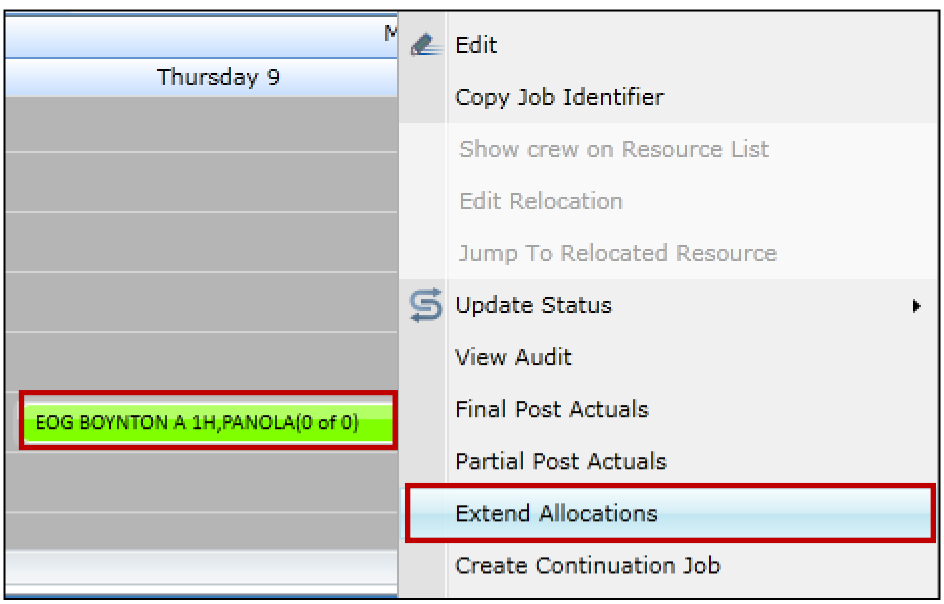


6. Click OK to close the **Edit Job Form**. This completes the extending of the Job.



Use the following steps to extend associated Resource Allocations as a result of extending the scheduled job.

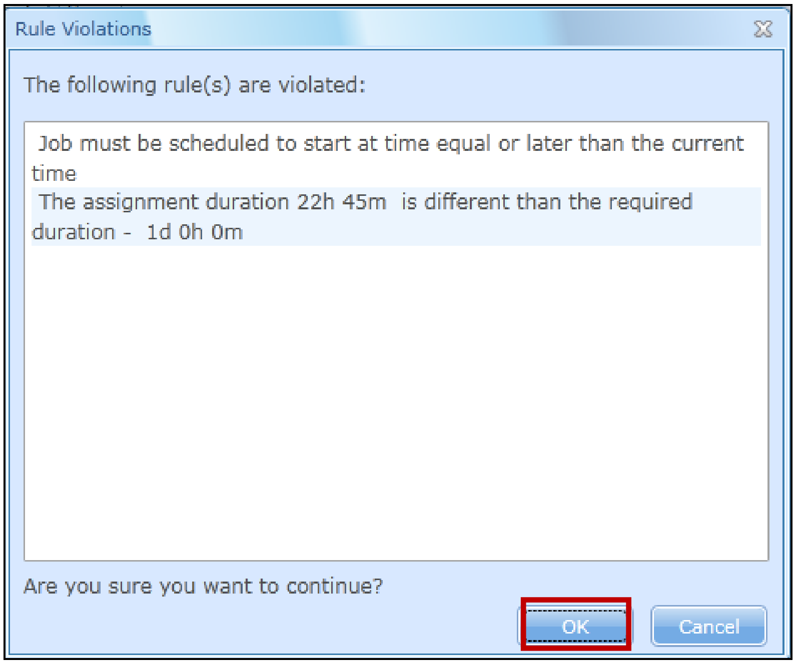
1. On the Resource Gantt, right-click on the Job. A dialog window displays.



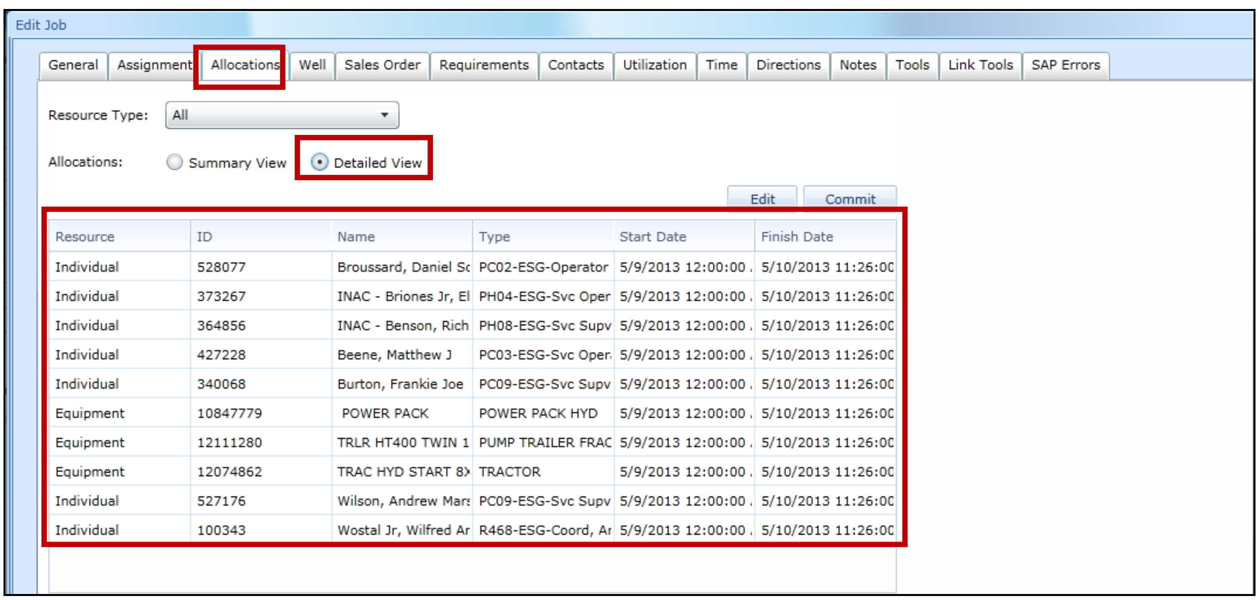
2. Select **Extend Allocations** from the list of options.

3. Click 

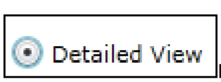
after validating the assignment duration to close the *Rule Violations* window.



4. In the **Scheduling** view, double-click on the Job to validate extended allocations. The **Edit Job Form** opens.



5. Click the **Allocations** tab.

6. Click 

radio button.

7. Validate that the resources allocations has been extended.

8. Click 

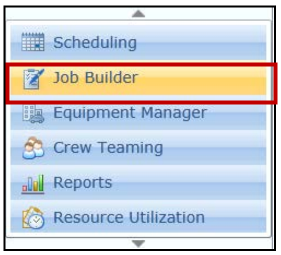
to close the **Edit Job Form**.

Job Builder View

Job Builder view allows the user to view jobs based upon user-defined filters.

Note: Some of the jobs displayed in the **Job Builder** view may not appear in the **Job** list within the **Scheduling** view. The display differences have to do with the calendar dates and filters that may be applied.

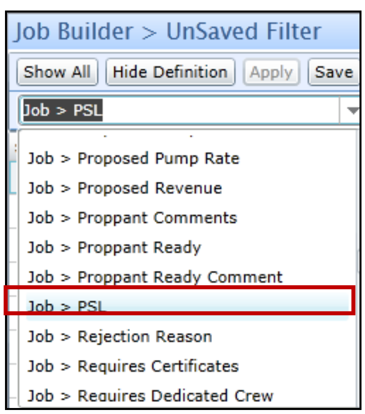
To display the **Job Builder** view, click the **Job Builder** tab from the View list. The **Job Builder** list is displayed.

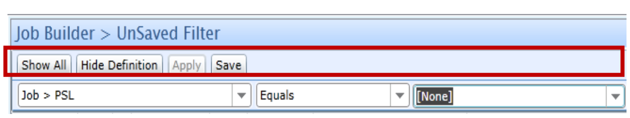


For the **Job Builder** view, load a filter to see the jobs you wish to see.

For instance, you can view jobs within multiple PSLs, but belonging to specific plants or locations, as in the following example:

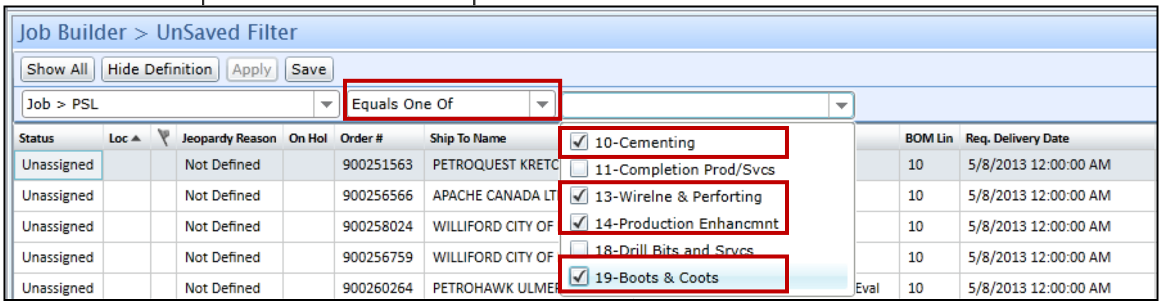
1. Click the dropdown menu and select the **Job > PSL** parameter. Two new dropdown menus display.





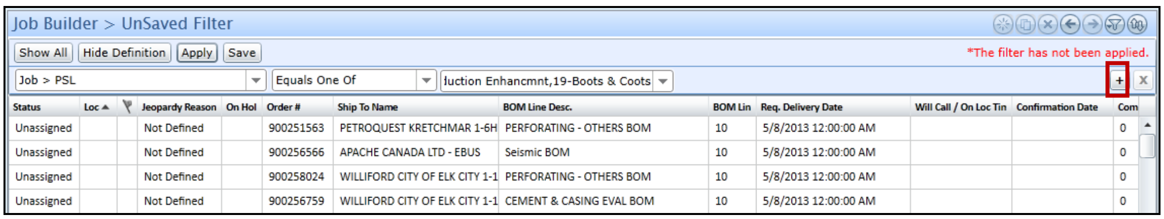
2. Click the middle dropdown and choose **Equals One Of** operator.

3. Click the last dropdown and select multiple PSLs as shown.



4. Click Apply to assign the filter, which in this case, will list jobs for four PSLs.

5. Click + to add an additional filter layer.

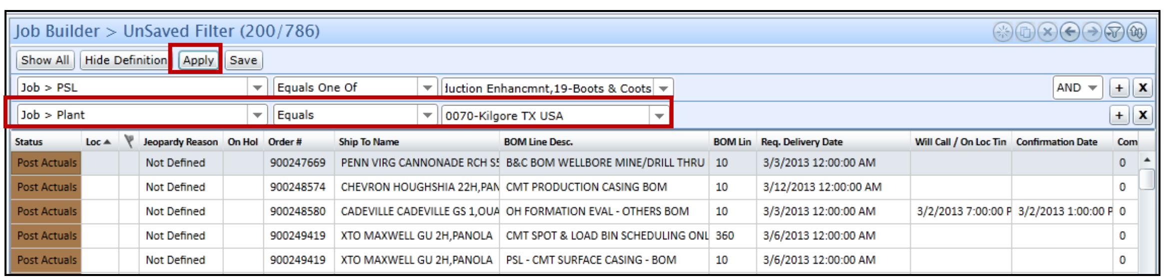


6. From the first dropdown list select the **Job** > **Plant** parameter.

7. From the middle dropdown list select the **Equals** operator.

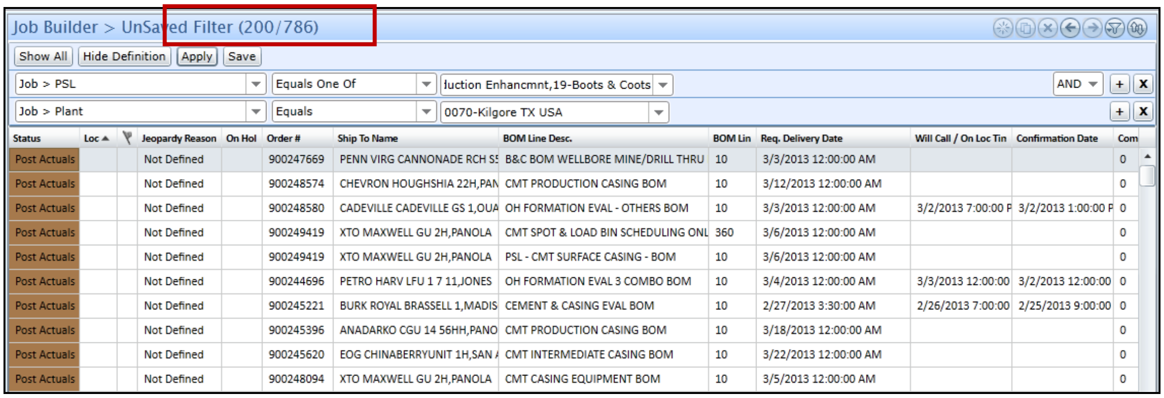
8. From the last dropdown list, select the search criteria to be matched. In this case, **0070 Kilgore TX USA**.

9. Click Apply.



The filters, which display the job list shown below, state: ‘List all jobs within the Cementing, Production Enhancement, Wireline and Boots & Coots PSLs, that belong to the Kilgore plant’.

Note that the title bar of the list shows that 200 of 786 jobs match the filter’s criterion.

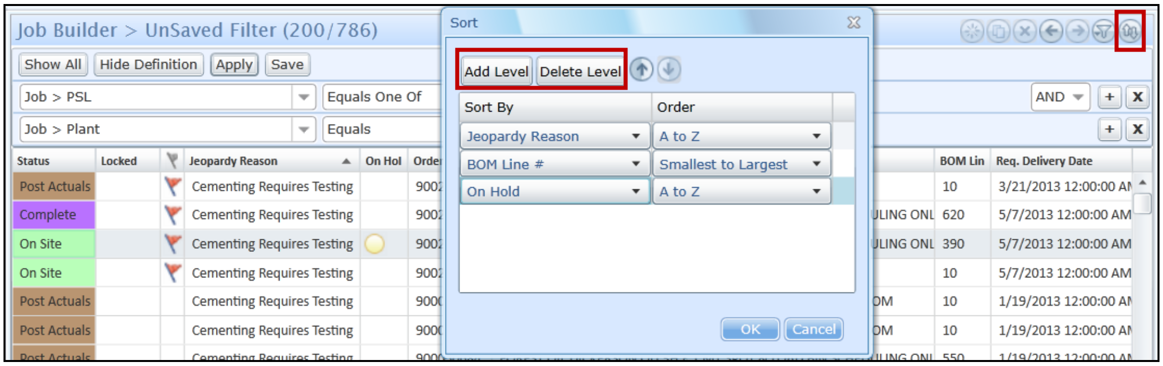


The following columns are displayed for each job in the **Job Builder** view:

1. **Status**: Current status of the job
2. **Locked**: If the job is locked, a icon appears in the **Locked** column
3. **Flag:** A red flag in this column identifies the job as having been placed in jeopardy
4. **Jeopardy Reason**: If the job is in jeopardy, the reason is displayed
5. **On Hold**: If the job is on hold, reason is displayed
6. **Order #**: Displays the Sales/Job Order number
7. **Ship To Name**: Displays the Customer name and Well name
8. **Job Name**: Displays the Job name
9. **BOM Line Desc.**: Displays the short Bill of Materials line description for the job
10. **BOM Line #**: Displays Bill of Materials line item number for the job
11. **Req. Delivery Date**: Displays the required delivery date of the job
12. **Confirmation Date**: Displays the confirmation date of the job
13. **Allocated HHP**: HHP that is allocated to the job
14. **Completed Stages**: Displays the current stage of the job
15. **Total Stages**: Displays the total number of stages for the job
16. **Plant**: Plant to which the job belongs
17. **Op Area:** Operational area to which the job belongs
18. **PSL/Sub-PSL**: PSL/Sub-PSL to which the job belongs

Optional Feature from Job Builder View

The Job Builder View can further be sorted in ascending and descending order by clicking on the **Sort** icon. A table will appear to Add/Delete additional levels to further sort the jobs that were returned from your orginal filter search.



Helpful Tips:

- Right-click on a job and choose **Edit** or **double-click** a row to display the Job form
- Drag columns left or right to rearrange the column lay-out of the Job list
- Click any of the column headers to sort the column order (ascending / descending)

  Depending upon the data that is loaded and the filter(s) that are applied, the **Job Builder** columns that are displayed will vary.

Edit Job Form - PE

The **Edit Job** form holds all the relevant properties for a job. Information concerning the job may be edited from the **Job** list in the **Scheduling** view, an **Assigned** job on the **Resource Gantt**, or the **Job Builder** view.

NOTES:

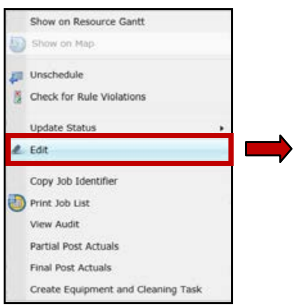
1. The **Assignment** tab only appears on the form when the job has been scheduled and in the **Scheduling** view.
2. Your PSL may not use all of the fields that are currently displayed in this document.

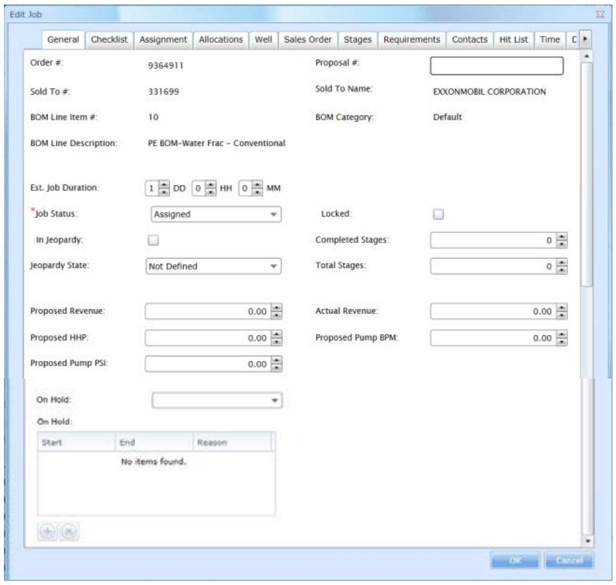
To view/edit the **Edit Job** form:

1. Right-click on the required job (from Job List/Gantt/Job Builder view). A list of options displays.

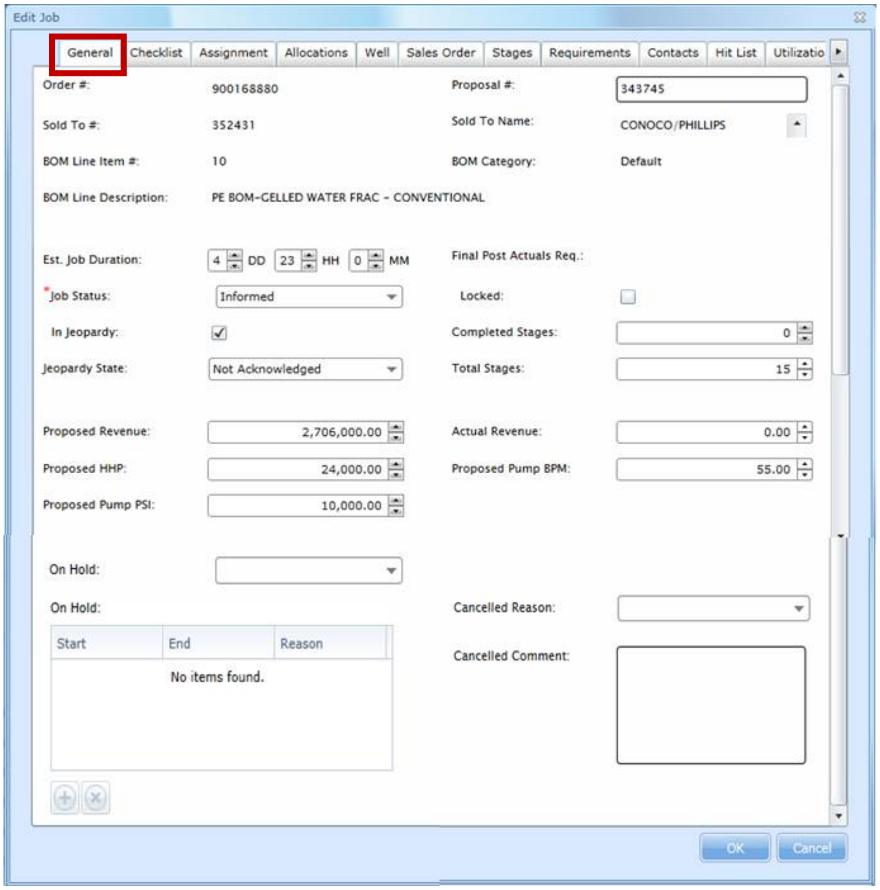
2. Select the **Edit** option. The **Edit Job** form displays

NOTE: You can also double-click any job to display the **Edit Job** form.





1. **General Tab**

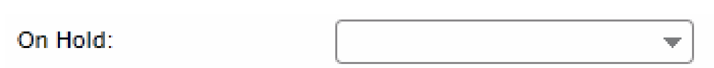


- **Order #**: Displays sales order number of the job
- **Proposal #**: Used to enter the proposal number
- **Sold To #**: Displays the customer number associated with the job
- **Sold to Name**: Displays the customer name associated with the job
- **BOM Line Item #**: Displays Bill of Materials line item number for the job
- **BOM Category**: Displays the grouping of services and materials that will be provided for a job
- **BOM Line Description**: Displays the short Bill of Materials line description for the job
- **Est. Job Duration**: By default, this field is set at a day but can be manually changed. The field is populated with the estimated duration of the job, gate-to-gate.
- **Job Status**: Displays the current status of the job

NOTE: In most cases, after the Scheduler updates the status to **Informed**, subsequent statuses of the job are generally updated from **Job Details** (the ClickSchedule mobile application). However, if necessary, the job status can also be updated in the **Edit Job** form.

- **Locked**: Check this box if the job needs to be locked. It prevents the job from being assigned to another crew. This makes the **Locked Comment** field visible. When c cked, the is visible in the **Locked** column of Job List.
- **Locked Comment:** Used to enter the reason in this text field for locking the job. This is a required field if the **Locked** checkbox is selected.
- **In Jeopardy**: Check this box if the job is **In Jeopardy**. When checked, this turns on the **In Jeopardy** icator .
- **Jeopardy State:** Used to select the jeopardy reason

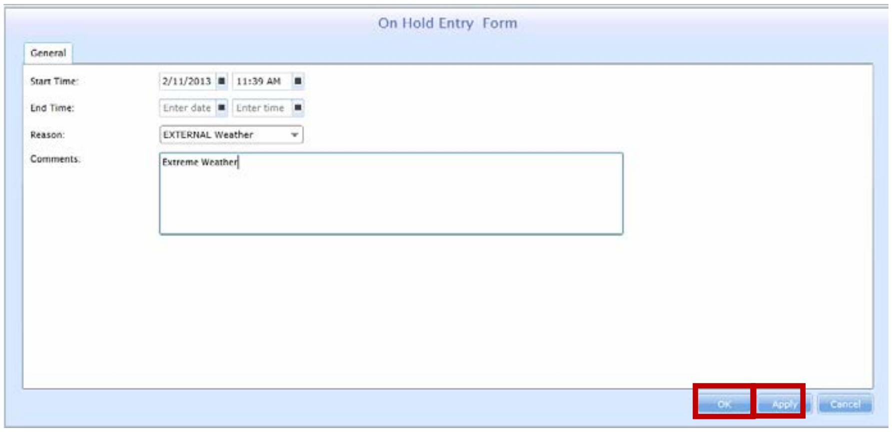
  NOTE: The **Jeopardy** checkbox and **In Jeopardy** reason may be auto-set due to business rules/policies that have not been met.
- **Completed Stages**: Used to enter the current stage value for the job
- **Total Stages**: Used to enter the total required stages of a job
- **Proposed Revenue**: Used to enter proposed job revenue. It is populated from the net value of the order, but can be manually changed.
- **Actual Revenue**: Used to enter actual job revenue
- **Proposed HHP**: Used to enter the proposed Horse Power (HHP) value for the job
- **Proposed Pump BPM**: Used to enter the proposed pump rate (Barrels Per Minute) for the job
- **Proposed Pump PSI**: Used to enter the proposed pump pressure (Per Square Inch) for the job
- **On Hold:** Use the drop down menu to select yes/no to indicate if the job is On Hold.



- The three columns that display on the **On Hold** table are:
  - **Start**: Select the time when the hold period starts.
  - **End**: Select the time when the hold period ends.
  - **Reason**: Select the **On Hold** reason for the job.

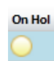
Click to add a new row to the **Hold Time** table. Click to delete a selected **Hold Time** record.

NOTE: To create a new **On Hold** record you need to be in the **Job Builder View**, but you can delete **On Hold** records from **Job Builder** and **Scheduling** view table.

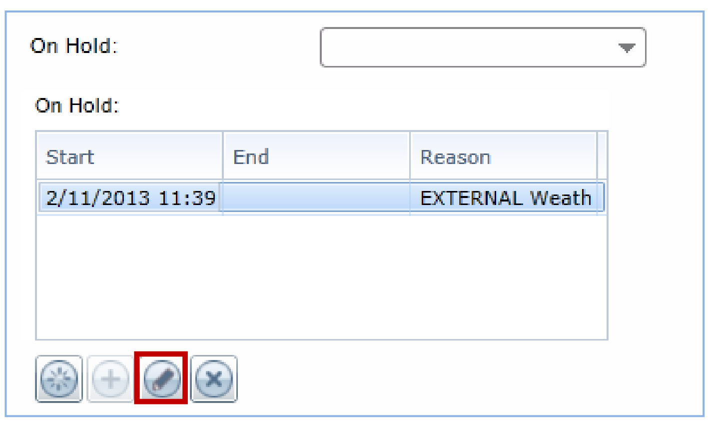


- **Start Time:** Used to select the date and time when the hold period starts
- **End Time:** Used to select the date and time when the hold period ends
- **Reason**: Used to select the **On Hold** reason for the job
- **Comments**: Free text field to describe the **On Hold** reason details

Note: Click the **Apply** button and then the **OK** button. The entry displays in the **On Hold** table.

Note: The **On Hold** 

radio button displays on the line item for the Sales Order and on the **Job List** and the **Resource Gantt**.



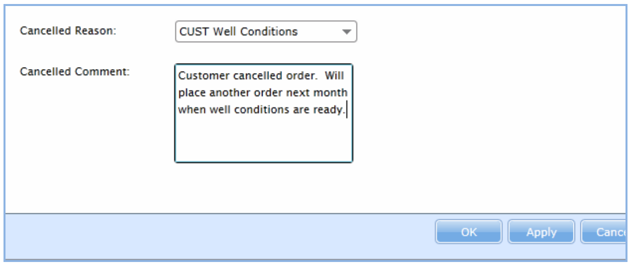
Note: To complete the **On Hold** table, click the line item to be completed, click  , enter the **End Time** fields, click **Apply** button, click the **OK** button. The table is now updated and the Job is no longer **On Hold.**

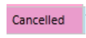
Note: Click  to delete a selected **Hold Time** record.

NOTE: All cancelled fields are only visible when you cancel a job.

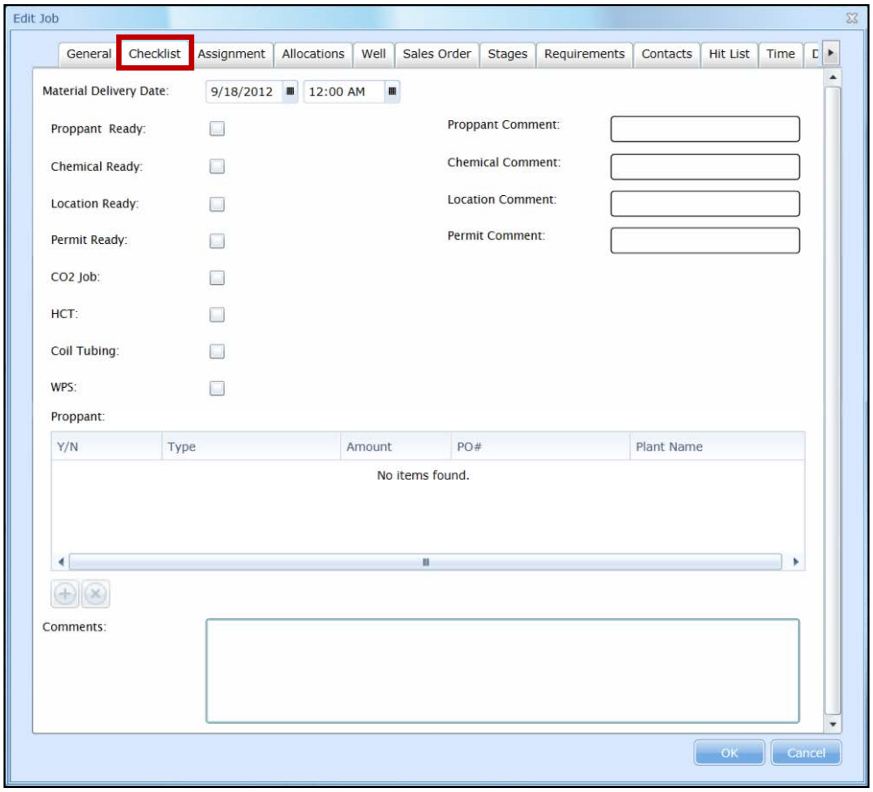
- **Cancelled Reason**: Used to select the reason for cancelling the job. This is a required field if the **Cancelled** checkbox is selected.

- **Cancelled Comment**: Free form text used to provide additional information for the job cancellation



Note: Click **Apply** button and a pop-up message appear. Click the **Yes** button to cancel the job. Click the **OK** button and the job status will change to **Cancelled** () in the **Job Builder** view and on the Job List in the **Scheduling** view.

2. Checklist Tab



- **Material Delivery Date**: Used to enter the date and time of the material delivery. By default it is populated with the required delivery date from SAP. This may be changed as per the requirement.
- **Proppant Ready**: Check this box if the Proppant is ready
- **Proppant Comment**: Used to enter notes concerning proppant in this text field
- **Chemical Ready**: Checkbox is marked if chemical processes or systems are utilized during the job
- **Chemical Comment**: Used to enter notes concerning chemicals in this text field
- **Location Ready**: Checkbox is marked if the physical location where services are performed is ready
- **Location Comment**: Used to enter notes regarding location in this text field
- **Permit Ready**: Checkbox is marked if job requires permits, and they have been issued
- **Permit Comment**: Used to enter notes concerning permits in this text field
- **CO2 Job**: Checkbox is marked if job requires use of carbon dioxide

- **HCT**: Checkbox is marked if job requires services of Halliburton Completion Tools

- **Coil Tubing**: Checkbox is marked if job requires coil tubing service provided by Boots & Coots

- **WPS**: Checkbox is marked if job requires services provided by Wireline & Perforating Services

- **Proppant Table**: Displays details of proppant used during the job

  - **Y/N**: Select **Y** if proppant was used for the job

  - **Type**: Used to select the type of proppant from the dropdown list

  - **Amount**: Used to enter the quantity of proppant in this field

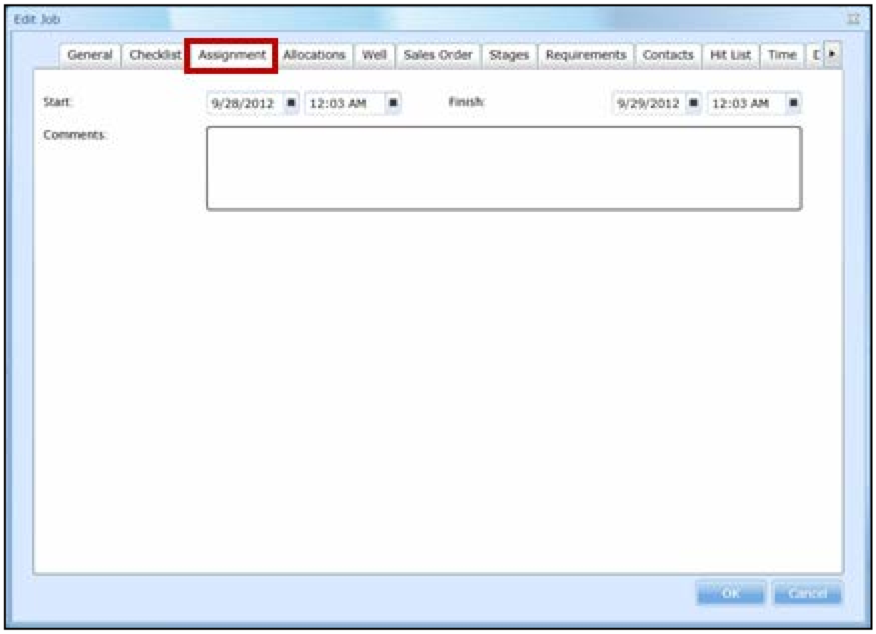
  - **PO #**: Used to enter the purchase order issued for the acquisition of proppant

  - **Plant Name**: Used to enter the name of the plant supplying proppant for the job

  Note: Click to add a proppant record. Click to delete a selected proppant record.

- **Comments**: Used for entering notes related to any of the **Checklist** items

3. Assignment Tab



NOTE: Assignment tab is only visible in the **Scheduling View** once the job has been **Assigned**.

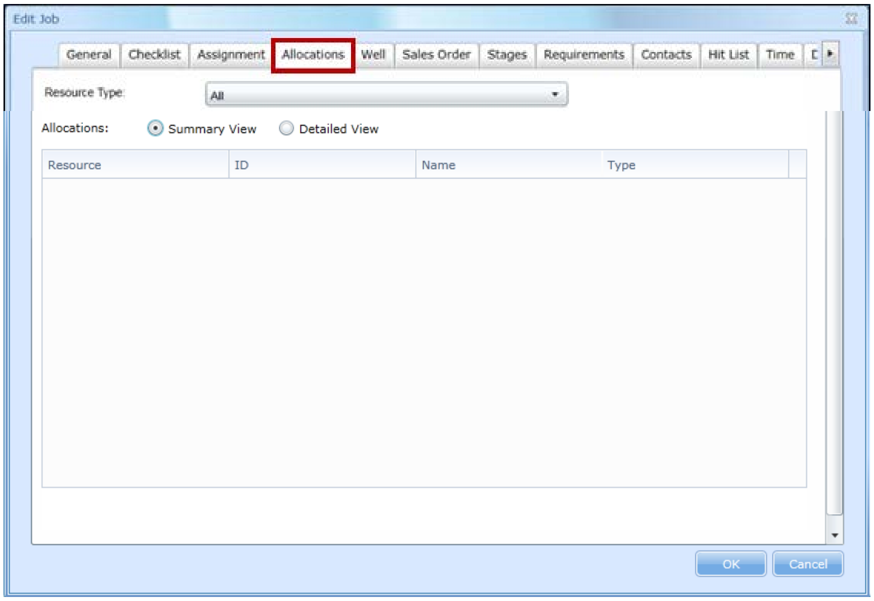
- **Start**: Displays the intended start date and time of the job (gate-to-gate). Populates when the job is dragged to the Gantt, but the field may be edited.

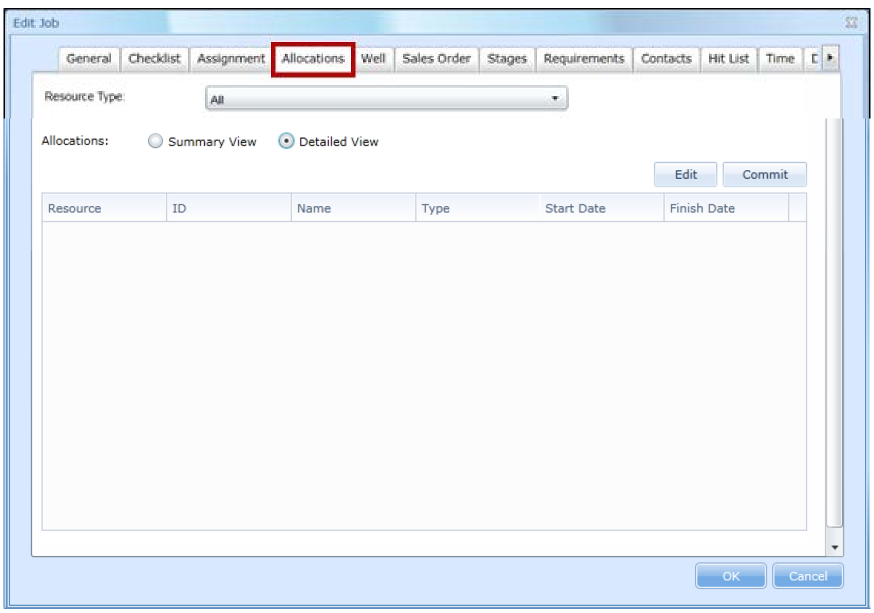
- **Finish**: Displays the intended finish date and time of the job (gate-to-gate). Populates when the job is dragged to the Gantt but the field may be edited.

  NOTE: The **Start Date** and **Time** is set when the job is dragged on to the **Resource Gantt** chart. After that, the start time can be edited. The finish date is adjusted in the mobile.

- **Comments**: Used to enter any comments related to the job

4. Allocations Tab



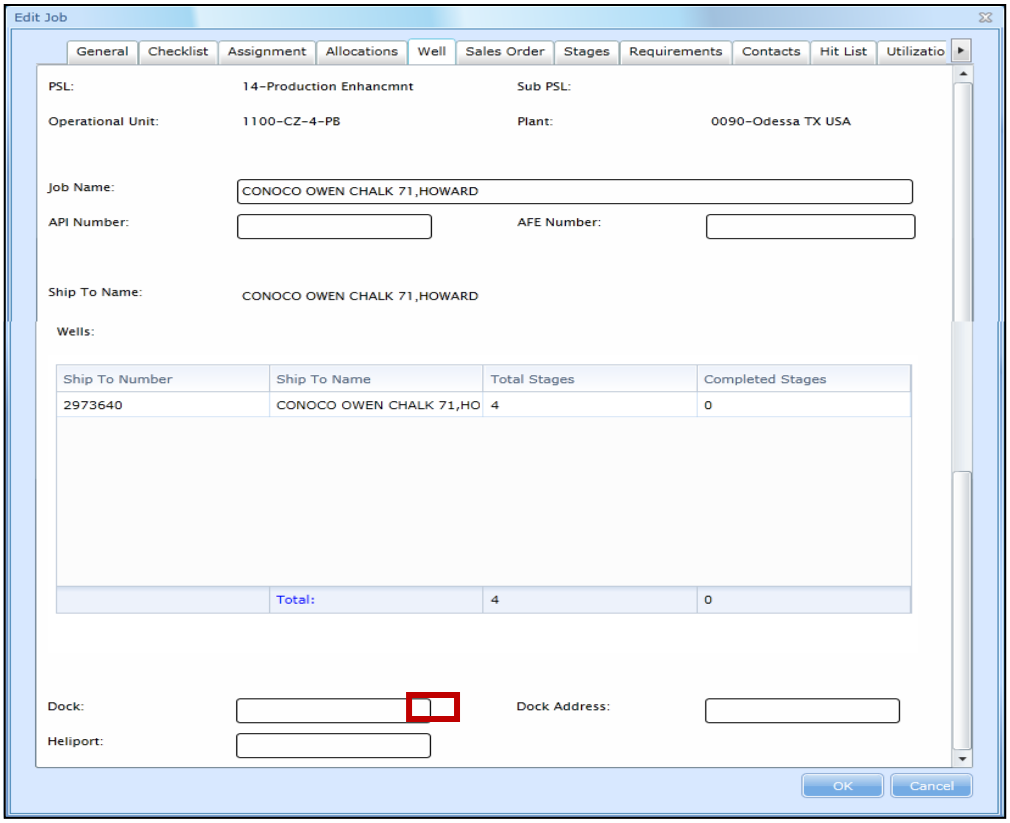


- **Resource Type**: Used to select the type of resource allocated to the job. The resources are then displayed in the **Allocations** table.
- **Allocations**: Displays the list of resources allocated to the job according to the selected value in the **Resource Type** drop-down.

- **Summary View** : Summary list of allocations
- **Detailed View**: Detailed list of allocations and allocation times

- **Resource**: Displays the type of resource, for example, Individual, Equipment
- **ID**: Displays the resource unique identifier (SAP ID#)
- **Name**: Displays the name of the resource
- **Type**: Displays the title of the resource
- **Start Date:** Start date and time of allocation
- **Finish Date:** Finish date and time of allocation
- **Edit:** Button that allows user to edit the allocation for the resources
- **Commit:** Button that allows user to commit the edits made to allocations

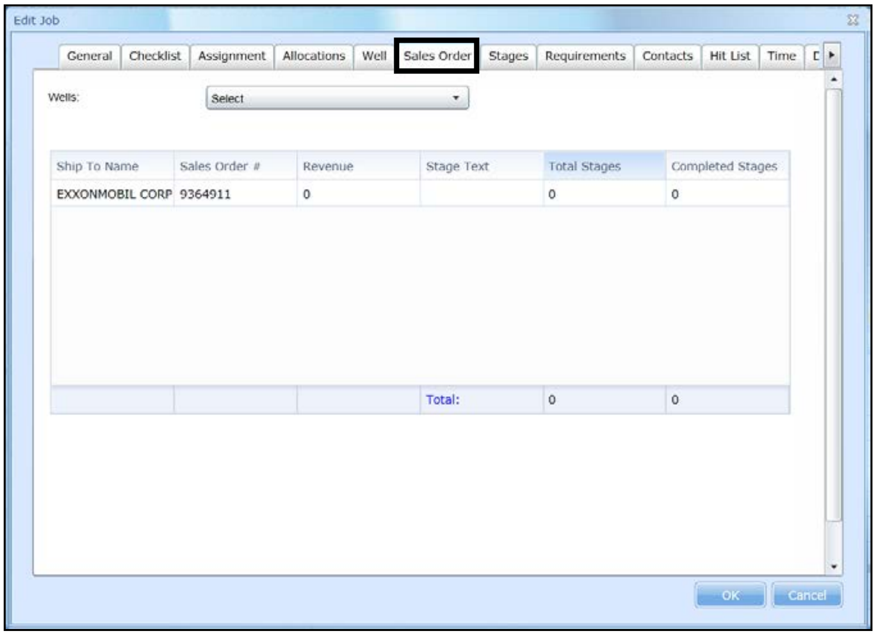
5. Well Tab



- **PSL**: Displays the Product Service Line
- **Sub PSL**: Displays a division within the primary Product Service Line
- **Operational Unit**: Displays the name of the operational unit of the job
- **Plant**: Displays the physical location to which the job is assigned
- **Job Name**: Used to enter more information pertaining to Job or Well. By default, the ship to name is entered, which consists of the customer name, well name, and number.
- **API Number**: A unique, numeric identifier assigned to each well by the American Petroleum Institute may be entered in this field.
- **AFE Number**: Used to enter the Authorization For Expenditures number of the job in this field
- **Ship To Name**: Displays the customer name, well name, and number

- **Wells Table**: Displays well details
  - **Ship To Number**: Displays SAP generated **Ship To** number
  - **Ship To Name**: Displays the name of the customer operating the well
  - **Total Stages**: Displays the number of stages the job comprises
  - **Completed Stages**: Displays the number of stages completed for the job
  - **Total:** Counts number of **Total Stages** and number of **Completed Stages** populated from the **Sales Order** tab
- **Dock**: Used to enter dock information
- **Dock Address**: Used to enter the dock address
- **Heliport**: Used to enter heliport information

6. Sales Order Tab



- **Wells**: Used to select the sales order/well. It will display the different ship to's.
- **Sales Order Table**: Displays a list of customer or well details for the selected value of determined by using the **Wells** dropdown menu

  – **Ship To Name**: Displays the the customer name, well name, and number

  – **Sales Order**: Displays the sales order number for the job

  – **Revenue**: Displays the proposed revenue the job will generate

  – **Stage Text**: Contains text concerning the stages of the job

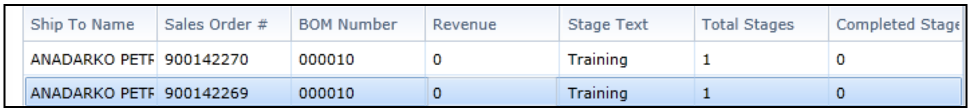
  – **Total Stages**: Displays the number of stages for the job

  – **Completed Stages**: Displays the number of completed stages for the job

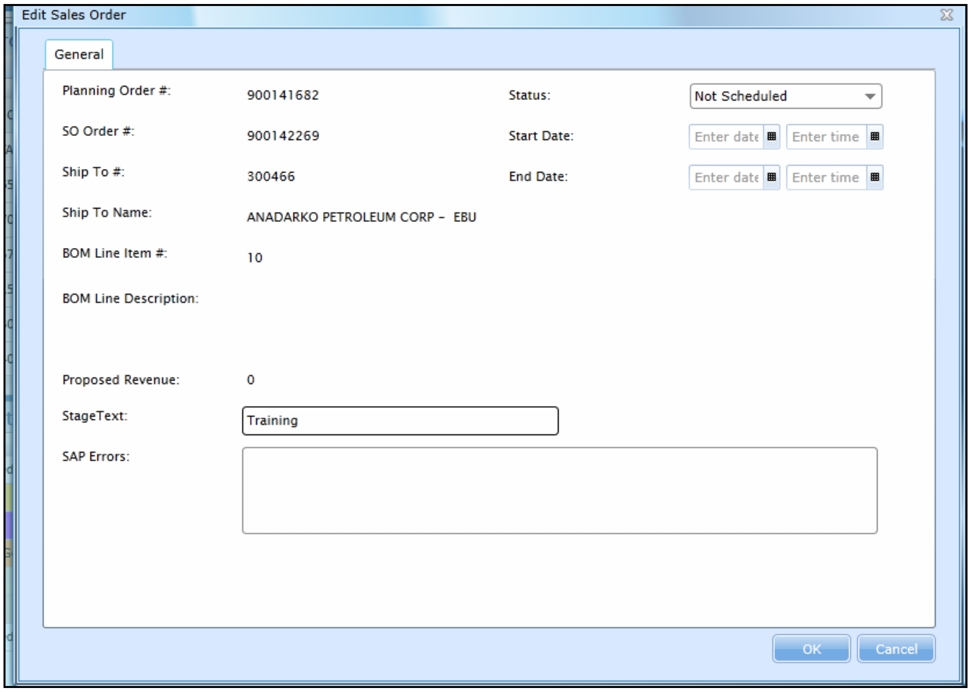
  – **Total**: Counts the number of **Total Stages** and the number of **Completed Stages**

NOTE: When using Planned Orders, Order Type ZBPO, and the ZOH Sales Order **does not** have any stages, it will be necessary to update the ZOH sales order with the "Sales Order End Date" manually. See **How to add end date for ZOH child QRC**.

Select the sales order without stages and double click on the line item that is highlighted and the **Edit Sales Order** form displays.



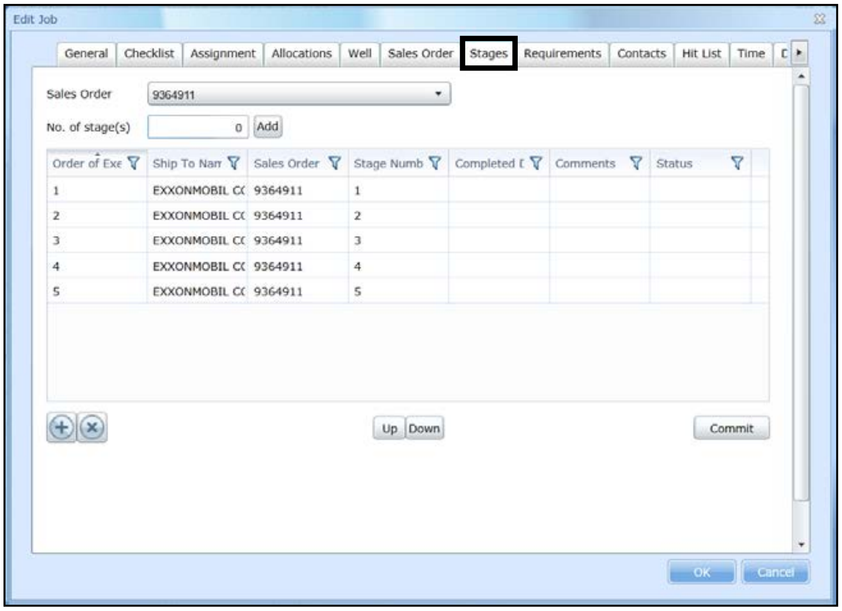
Ship To Name	Sales Order #	BOM Number	Revenue	Stage Text	Total Stages	Completed Stage
ANADARKO PETF	900142270	000010	0	Training	1	0
ANADARKO PETF	900142269	000010	0	Training	1	0

.


NOTE: End Date and **End Time** must be entered. If the ZOH (associated to the ZBPO sales order) has stages, the completed date and time for the last stage will populate the ZOH end date and time.

NOTE: If there are errors during the partial posting of the ZOH order, it will display in the **SAP Errors** field. Refer to the QRC's, **Resolve Resource Utilization** and **Resource Utilization View** for further details on how to resolve resource utilization errors.

7. Stages Tab



- **Sales Order**: From the drop-down, choose the **Sales Order** in which to display the detail records in the **Stage** table.
- **No. of Stage(s)**: Used to enter the number of stages incorporated in the job
- **Add**: Click Add button to automatically calculate stages
- **Stage Details Table**: Displays the details of the stages

  NOTE: Click on any of the column headers to filter the column data.

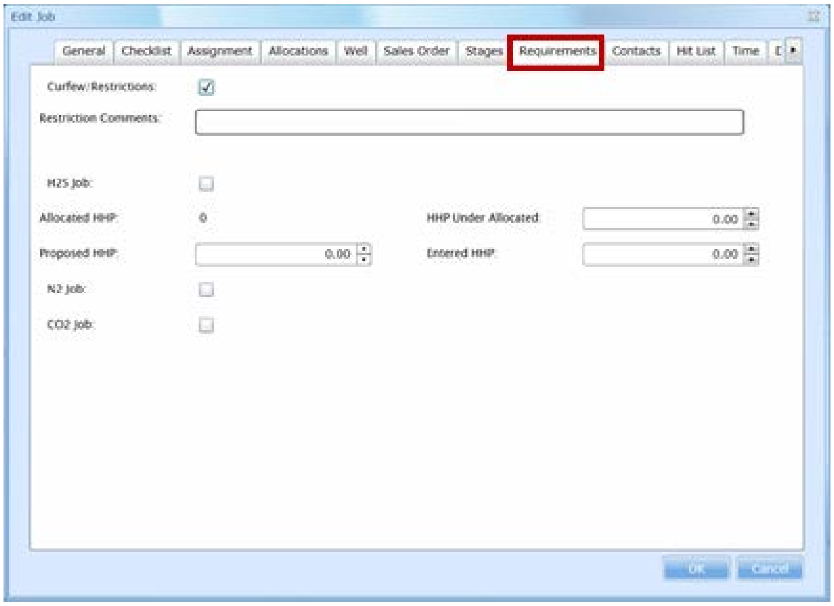
  - **Order of Execution**: Displays the execution order of the stages
  - **Ship To Name**: Displays the combination of the customer and well name
  - **Sales Order**: Displays the sales order number for the job
  - **Stage Number**: Displays the number of the stage
  - **Completed Date**: Displays the date the stage was completed
  - **Comments**: Displays comments concerning the associated stage
  - **Status**: Displays Completed or Skipped based on entry from mobile
- **Add**: Click button to insert another row into the **Stages** table.
- **Delete**: Click button to remove a selected row in the **Stages** table.
- **Up**: Click Up button to move the selected row up in the **Stages** table.

- **Down**: Click  button to move the selected row down in the **Stages** table.

- **Commit**: Click  button to save the layout of the **Stages** table.

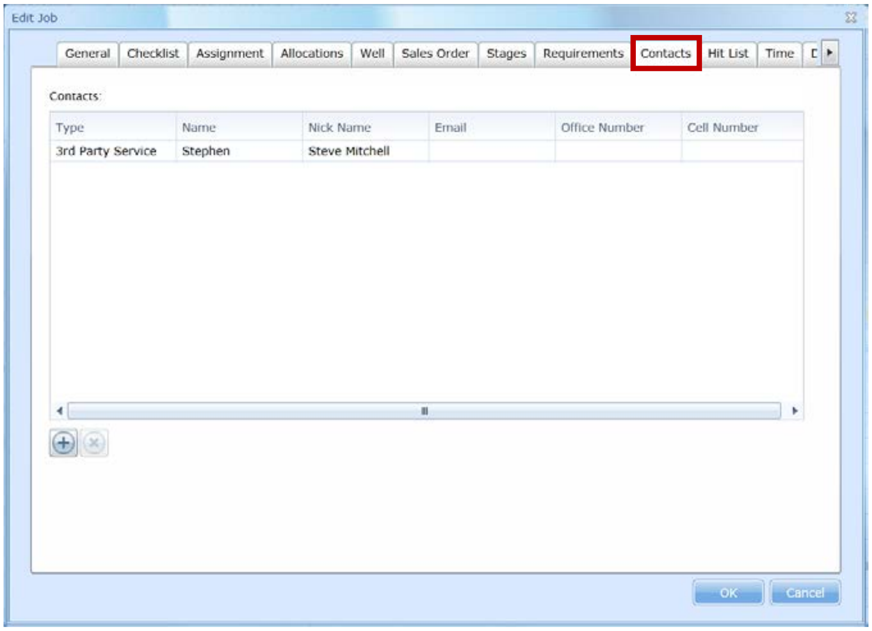
NOTE: If the job is in a status prior to complete, stages can be reassigned to another ZOH (associated with that ZPBO sales order). See **Setting up Individual Stages QRC** for steps on adding and updating stages**.**

8. Requirements Tab



- **Curfew/Restriction**: Check this box if there is a curfew or restrictions.
- **Restriction Comments**: Field appears when **Curfew/Restriction** is checked. Used to add comments in the text box regarding restrictions.
- **H2S Job**: Check this box if the job is a **H2S** job.
- **Allocated HHP**: Displays the allocated HHP value for the job.
- **HHP Under Allocated**: Used to enter the amount of horse power that is under allocated for the job in this field.
- **Proposed HHP**: Used to enter the proposed horse power required for the job in this field. If entered in the General tab, it will be pre-populated on this tab.
- **Entered HHP**: Used to enter the actual horse power used for the job in this field.
- **N2 Job**: Check this box if nitrogen foam is required for this job. Sets associated **N2** fields as visible.
  - **N2 Rate** (SCF): Used to enter the rate of nitrogen in this field.
  - **N2 SO #**: Used to enter the sales order number for the nitrogen used for the job in this field.
  - **N2 Volume** (SCF): Used to enter the volume of nitrogen.
- **CO2 Job**: Check this box if carbon dioxide foam is required for this job. Sets associated **CO2** fields visible.
  - **CO2 Rate** (BPM): Used to enter the rate of carbon dioxide.
  - **CO2 Volume** (TON): Used to enter the volume of carbon dioxide.

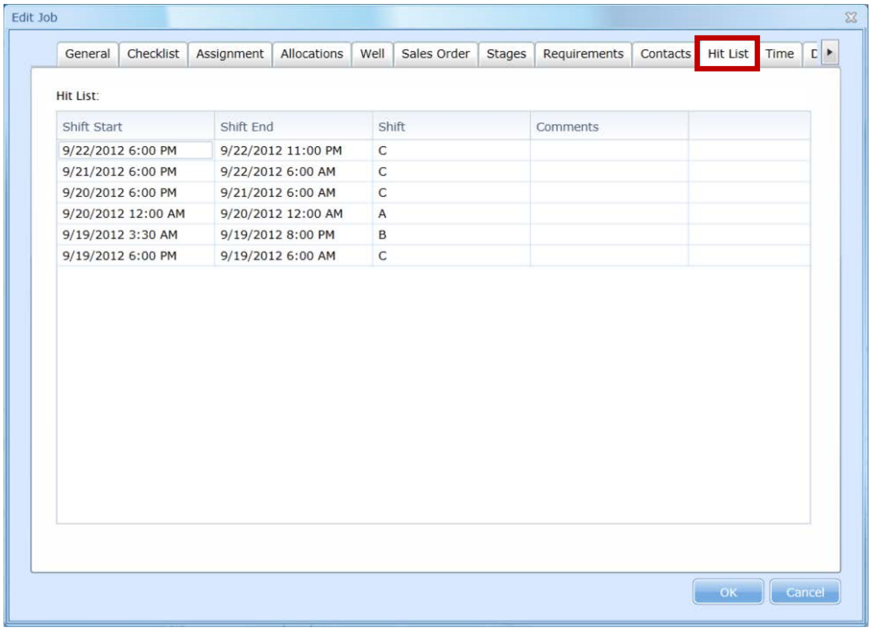
9. Contacts Tab



- **Contacts**: Displays a list of contacts associated with the job
  - **Type**: Displays the contact type
  - **Name**: Displays the first name of the contact
  - **Nick Name**: Displays a nick name for the contact
  - **Email**: Displays the email address for the contact
  - **Office Number**: Displays the office telephone number for the contact
  - **Cell Number**: Displays the mobile telephone number for the contact
- **Add Contacts**: To insert a contact details row in the **Contacts** table click . The **Contacts Search** form is displayed. Search for, and then select the desired contacts by marking the appropriate checkboxes in the form. When completed, click **OK.**

  NOTE: New **Contact** records are created in the **Job Builder** view. Click to create a new contact record
- **Delete Contacts**: Click to delete a contact from the **Contacts** table. When completed, click the **OK** button.

10. Hit List Tab



- **Hit List**: Displays each shift's start and end times during the life of the job. This information is generally entered and updated by the Mobile Lead Users; however, it can also be updated by double-clicking on the job in the **Job Builder View**.

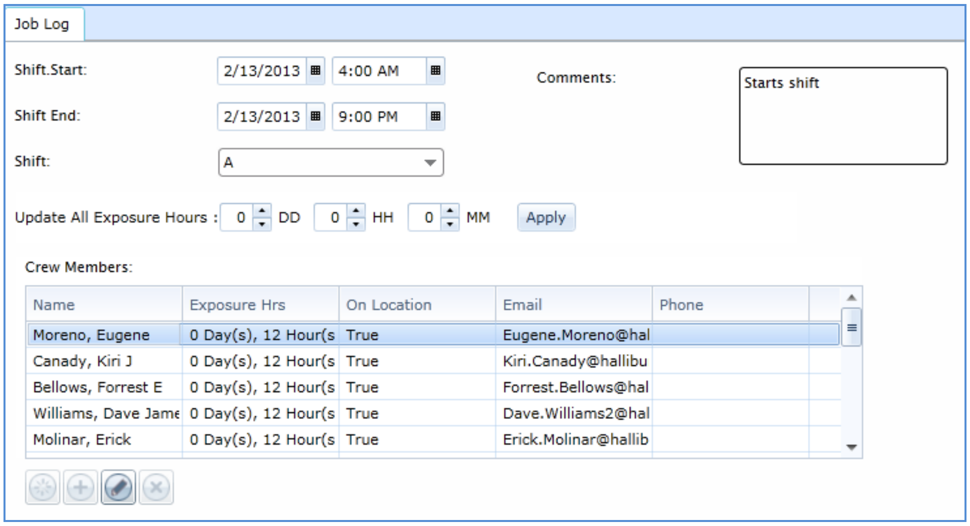
  – **Shift Start**: Displays the beginning start date and time of the shift

  – **Shift End**: Displays the ending time of the shift

  – **Shift**: Displays the name of the shift

  – **Comments**: Displays comments concerning the shift

- **Job Log** (displays once the Shift is double-click from the Hit List in Job Builder view)



- **Shift Start: Populated from time entered by Shift Supervisor for Depart time from mobile. Entry can be edited manually.**
- **Shift End: Populated from time entered by Shift Supervisor for Return time from mobile. Entry can be edited manually.**
- **Shift: Denotes the shift selected**
- **Update All Exposure Hours: Populated from the Hours entered via mobile by the Shift Supervisor**
- **Edit Exposure Hours**: If exposure hours need to be edited, populate the **Update All Exposure Hours** field and click the Apply button.
- **Comments:** Populated from the Comments entered when Shift Supervisor creates Call Out via mobile
- **Crew Members:** List of all individuals for selected Shift for particular day

– **Name:** Individuals Last Name, First Name

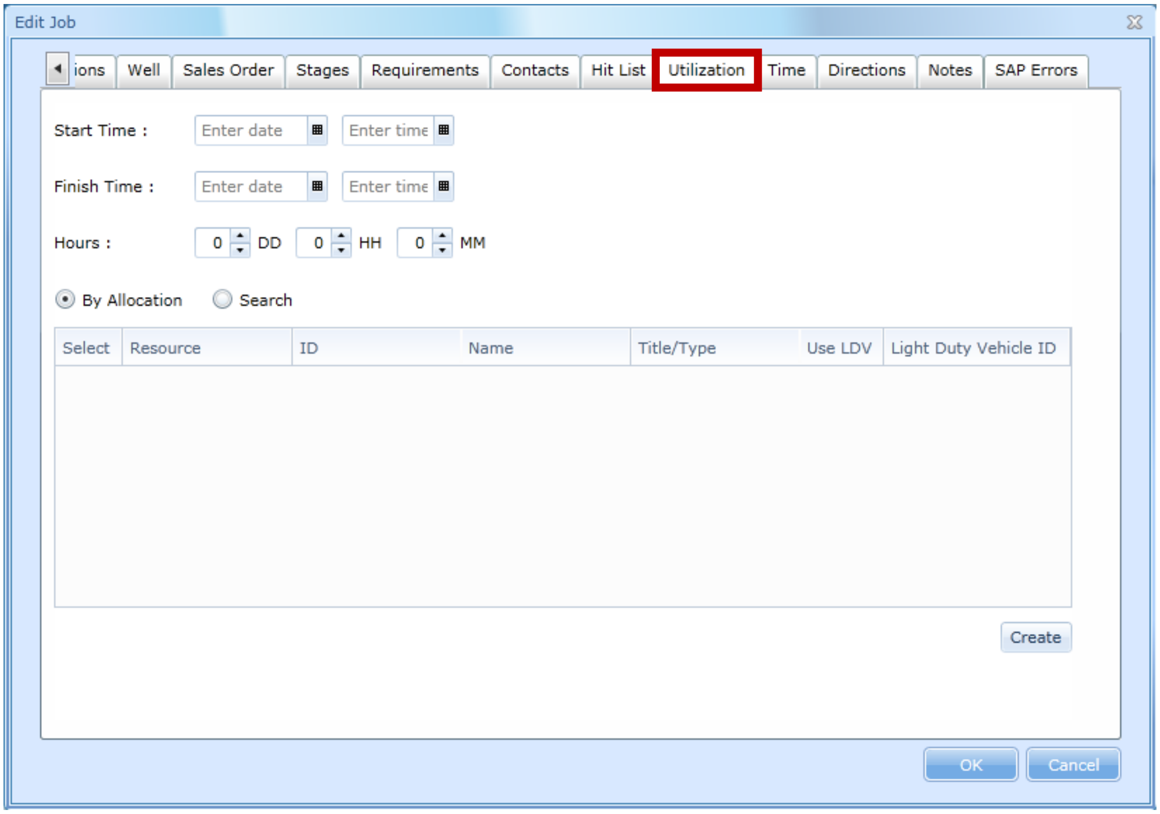
– **Exposure Hrs:** Listed Days and Hours entered via mobile

– **On Location:** True/False based on Hit List from mobile

– **Email:** Email address listed in ESS

– **Phone:** Phone number listed

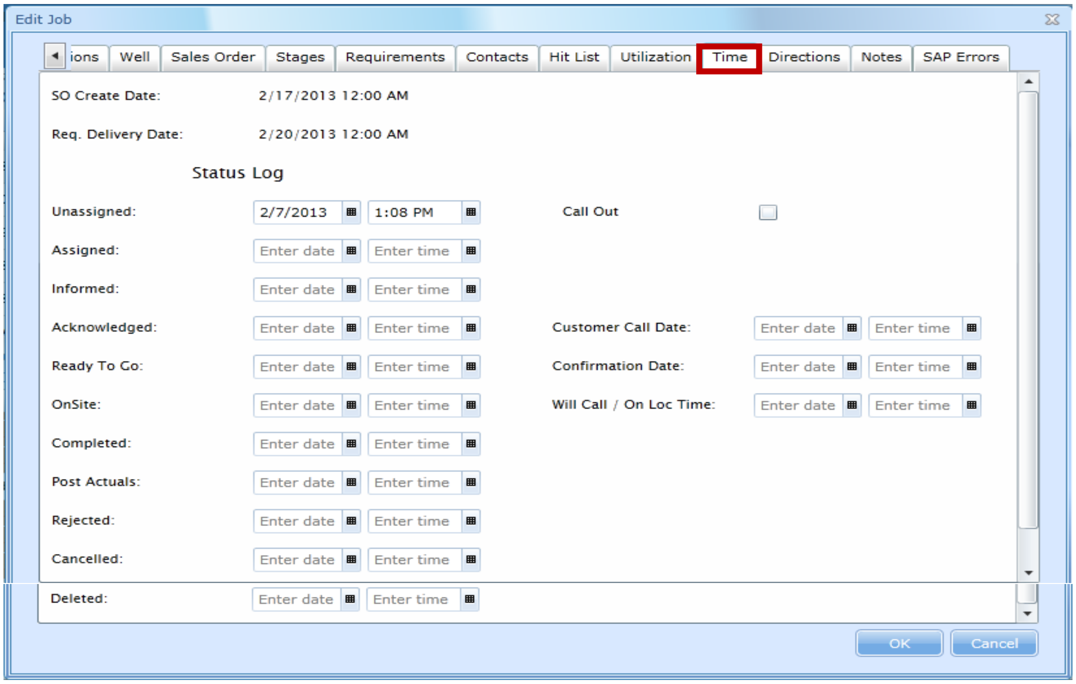
11. Utilization Tab



This tab is used to create Halliburton Resource Utilization records which can be viewed in the **Resource Utilization View**.

NOTE: See **Create Utilization Records** Quick Reference Card for how to create utilization records.

12. Time Tab



- **SO Create Date**: Displays the sales order creation date.
- **Req. Delivery Date**: Displays the required delivery date and time of the job. This information is populated from the SAP sales order.
- **Status Log**: Displays the **Date** and **Time** information the job acquired a status update throughout the lifecycle of the job. It is a timestamp when statuses are changed but can be manually edited.

– **Unassigned**: The job has passed from SAP to ClickSchedule, but the Scheduler has not yet assigned the job.

– **Assigned**: The Scheduler has assigned the job by dragging the job to the Gantt.

– **Informed**: The job has been sent to **Job Details**.

– **Acknowledged**: The job has been acknowledged.

– **Ready To Go**: Job Preparations are complete, and the crew is ready to leave the yard.

– **On Site**: Crew has acknowledged the resources are on site.

– **Completed**: Crew has indicated that the job has been completed.

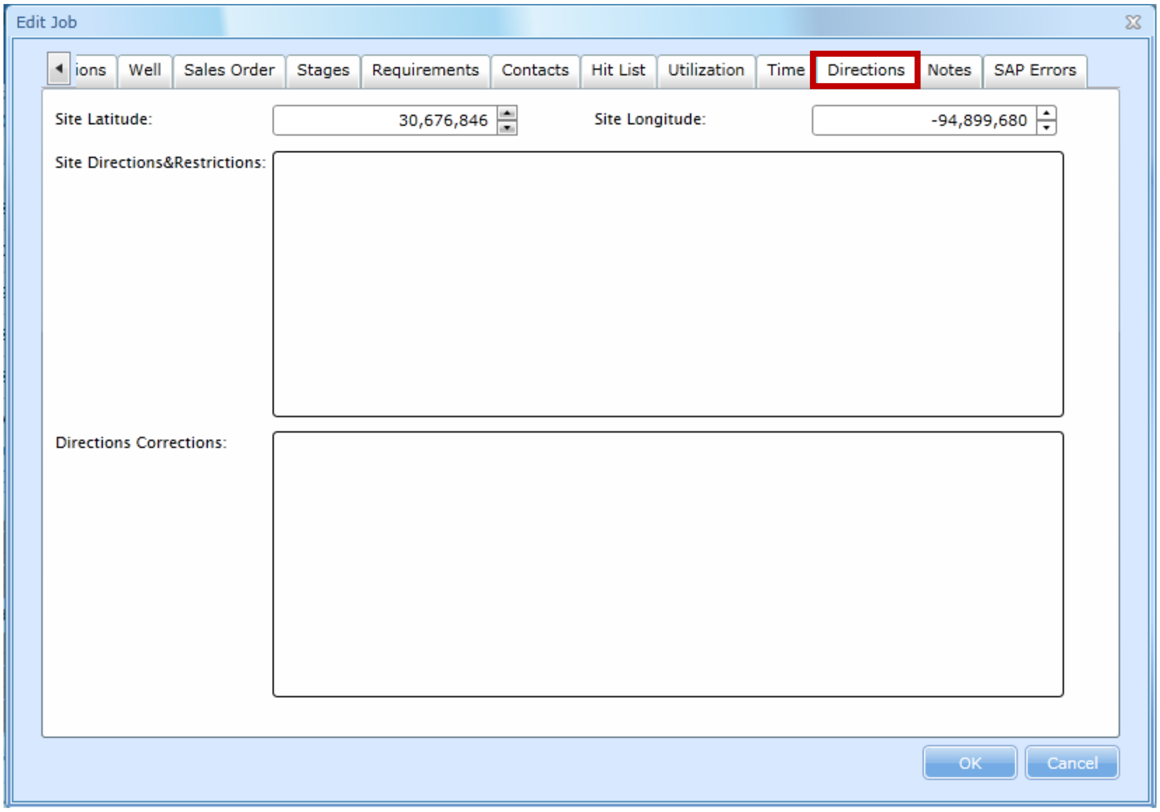
– **Post Actuals**: Partial and final post actuals have been performed and SAP has confirmed records posted and C (Complete) status in SAP.

– **Rejected**: In the event that a **Sales Order** is rejected in SAP, the time stamp of the rejection is passed to this field.

- **Cancelled**: Used to enter the date and time for a job that has been cancelled. Cancelling a job in ClickSchedule does not update any status in SAP.
- **Deleted**: In the event that a **Sales Order** is deleted rather than rejected in SAP, the time stamp of the deletion is passed to this field.

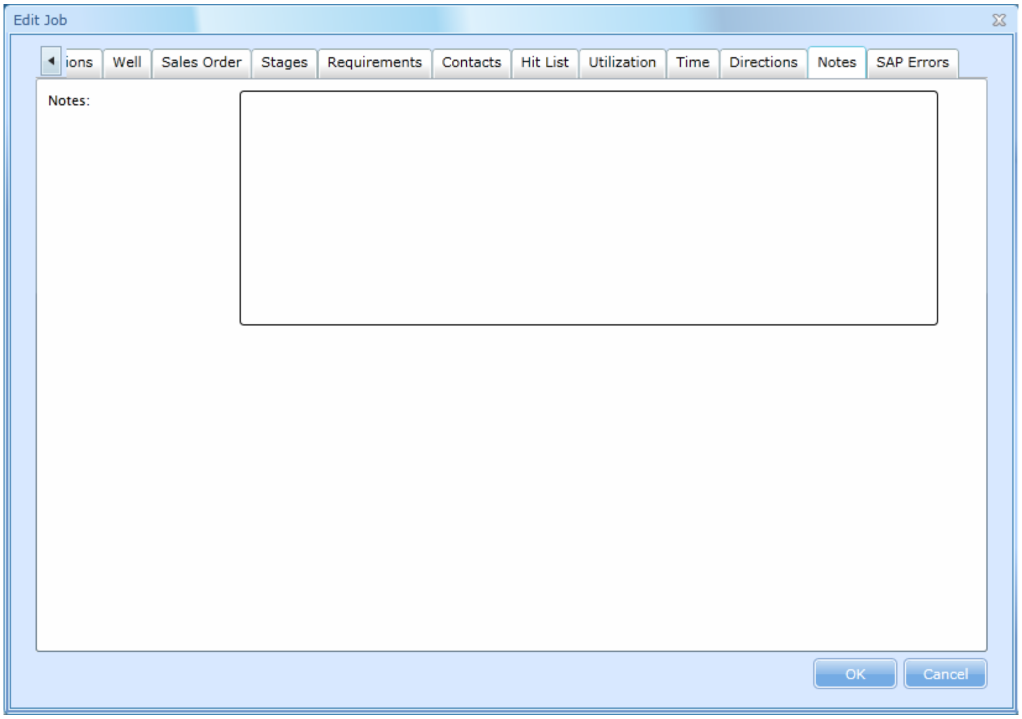
- **Call Out**: Mark this checkbox if a job is spontaneous or a customer calls with a job.
- **Customer Call Date**: Used to enter the date the customer was called
- **Confirmation Date**: Used to enter the confirmation date
- **Will Call** / **On Loc Time**: Used to enter the date by which **Will Call** is due or time crew needs to be on location

13. Directions Tab



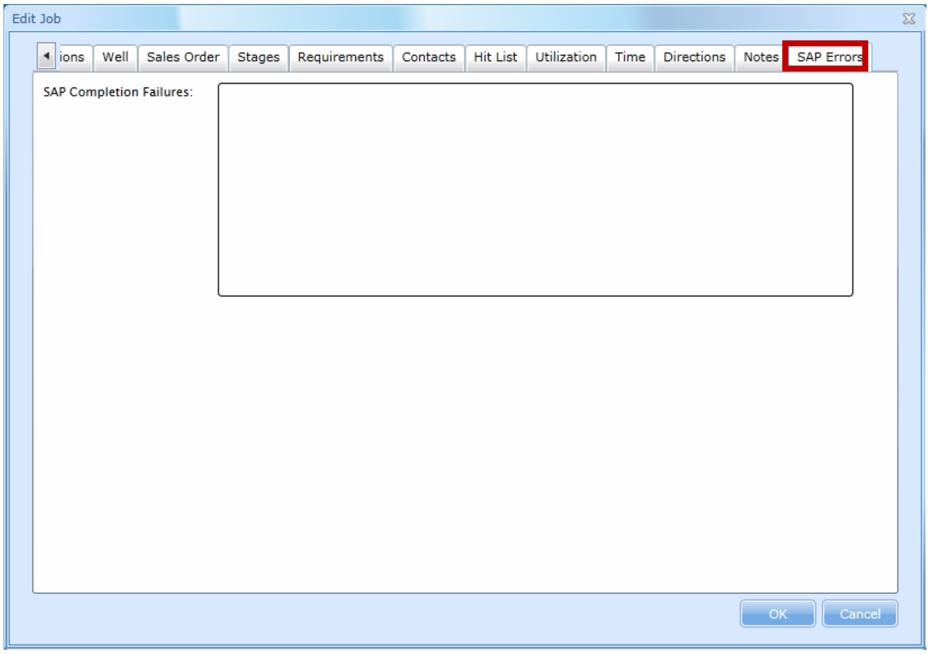
- **Site Latitude**: Default latitude information of the job site. This is based on the **Ship To** information.
- **Site Longitude**: Default longitude information of the job site. This is based on the **Ship To** information.
- **Site Directions & Restrictions**: Used to enter the directions to and restrictions for the site
- **Direction Corrections**: Generally, this field is populated from corrections sent by the Mobile Lead User– road closures, etc.

14. Notes Tab



- **Notes**: Used to enter any job-related notes. This information is passed to **Job Details**.

15. SAP Errors Tab

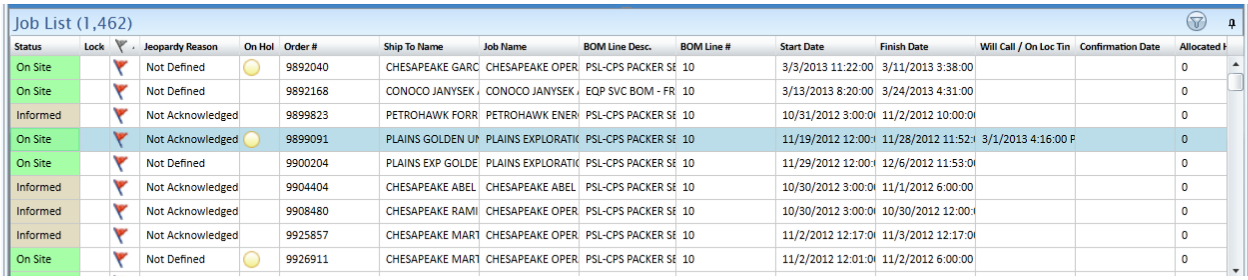


- **SAP Completion Errors**: In the event that **Partial Post Actuals** fails, error descriptions are passed to this field from SAP.

Note: See QRC titled: **Resolving Resource Utilization Errors** for step instructions on how to resolve SAP specific errors.

Job List

The **Job List** is a dynamic work area that displays information about all of the jobs that have been transferred from SAP to ClickSchedule.


Job List (1,462)

Status	Lock		Jeopardy Reason	On Hol	Order #	Ship To Name	Job Name	BOM Line Desc.	BOM Line #	Start Date	Finish Date	Will Call / On Loc Tin	Confirmation Date	Allocated H
On Site			Not Defined		9892040	CHESAPEAKE GARC	CHESAPEAKE OPER	PSL-CPS PACKER SE	10	3/3/2013 11:22:00	3/11/2013 3:38:00			0
On Site			Not Defined		9892168	CONOCO JANYSEK /	CONOCO JANYSEK /	EQP SVC BOM - FR	10	3/13/2013 8:20:00	3/24/2013 4:31:00			0
Informed			Not Acknowledged		9899823	PETROHAWK FORR	PETROHAWK ENER	PSL-CPS PACKER SE	10	10/31/2012 3:00:0	11/2/2012 10:00:0			0
On Site			Not Acknowledged		9899091	PLAINS GOLDEN UI	PLAINS EXPLORATI(	PSL-CPS PACKER SE	10	11/19/2012 12:00:	11/28/2012 11:52:	3/1/2013 4:16:00 P		0
On Site			Not Defined		9900204	PLAINS EXP GOLDE	PLAINS EXPLORATI(	PSL-CPS PACKER SE	10	11/29/2012 12:00:	12/6/2012 11:53:0			0
Informed			Not Acknowledged		9904404	CHESAPEAKE ABEL	CHESAPEAKE ABEL	PSL-CPS PACKER SE	10	10/30/2012 3:00:0	11/1/2012 6:00:00			0
Informed			Not Acknowledged		9908480	CHESAPEAKE RAMI	CHESAPEAKE OPER	PSL-CPS PACKER SE	10	10/30/2012 3:00:0	10/30/2012 12:00:			0
Informed			Not Acknowledged		9925857	CHESAPEAKE MART	CHESAPEAKE OPER	PSL-CPS PACKER SE	10	11/2/2012 12:17:0	11/3/2012 12:17:0			0
On Site			Not Defined		9926911	CHESAPEAKE MART	CHESAPEAKE OPER	PSL-CPS PACKER SE	10	11/2/2012 12:01:0	11/2/2012 6:00:00			0

Filtering job data makes it easier to analyze and view your data by hiding the data that you temporarily want to take out of view. Click to set up filter definitions.

Job data can also be sorted by column in ascending or descending order. Finally, the column width can be adjusted, selected, and dragged to different positions.

The following fields are displayed on the **Job List** in the default order:

Note: Some columns are PSL specific and only viewable based on the PSL profile.

1. **Status**: Current status of the job, which is color coded.
2. **Locked**: The **Locked** icon identifies the job as having been locked.
3. **(In Jeopardy):** The **Flag** icon identifies this job as having been placed in a jeopardy state.
4. **Jeopardy Reason:** Defines the reason this job is in jeopardy
5. **On Hold**: The **On Hold** icon identifies the job have been suspended.
6. **Order #**: Shows the Sales Order number related to the job
7. **Ship To Name**: Displays the name of the customer and/or the well name
8. **Job Name**: Displays the well name and number
9. **BOM Line Desc.**: Displays a short description for the Bill of Materials established for the job
10. **BOM Line #**: Displays the Bill of Materials line item number for the job
11. **Start Date**: Displays the time crew or resource left to start the job
12. **Finish Date**: Displays the scheduled completion date for the job
13. **Will Call / On Loc Time**: Displays the time the crew or resource is scheduled to be on location
14. **Confirmation Date**: Shows the confirmation date of the job
15. **Allocated HHP**: Shows the Horse Power allocated to the job
16. **Completed Stages**: Shows the current stage value for the job
17. **Total Stages**: Shows the total number of stages for the job

18. **Plant**: Plant responsible for completing the job
19. **Op Area**: Shows the name of the area for the job
20. **PSL/Sub-PSL**: PSL/Sub-PSL responsible for the job

Note: You can double-click on any job to open the **Edit Job** form, where you can view all of the job's details.

Job Status Definitions

The table below lists the different job statuses and their definitions:

Status	Definition
Unassigned	• Job requires review and determination of the next status • First status when order is created and job is sent from SAP to Click
Assigned	• The Scheduler has reviewed and validated the job details • The Scheduler has assigned the job to a specific crew for specific date/s
Informed	The assigned job has been sent to Job Details
Acknowledged	Mobile Lead User (MLU) has reviewed and acknowledged the work notification
Ready to Go	• MLU finalizes all preparations for the job and updates the job status to **Ready to Go** • The crew is ready to leave the yard
On Site	Crew has reached the customer site
Complete	The MLU: • Has captured every stage of the job and documented any issues (may not be applicable to all PSLs) • Has initiated the close out process • Has entered job duration and exposure hours • Has confirmed that the crew has left the site
Post Actuals	The Scheduler submits the actuals of the job and SAP has confirmed postings

Cancelled	• At the customer's request a job may need to be cancelled. • Scheduler is responsible for changing status to cancelled.
On Hold	• Allows Service leader to place a job in pending status with a reason and manual entry of notes (if needed).

ClickSchedule Key Terms

Term	Definition
Assignment	A job that is scheduled to a specific resource for a specific time
Availability	The time that a resource is available to be scheduled for jobs - includes the daily working hours, but does not include vacation time or sick leave
Battle Red	Halliburton's enterprise business transformation project
BOM	Bill of Materials. Used on all sales orders to identify the specific set of services and materials
Business Hierarchy	Describes the navigation tree that is seen in the ClickSchedule client application
ClickSchedule	The trademarked scheduling software application
ClickSoftware	ClickSoftware is the supplier of the Workforce Scheduling and Optimization (WS&O) solution (ClickSchedule)
Company Code	The central organizational unit of external accounting - the first level in the three-level Halliburton/ClickSchedule hierarchy
Cost Center	An organizational unit within a financial controlling area that represents where costs are charged
Crew	A group of schedulable resources working together as a team
Designated Equipment/Tools	The equipment (tool) associated to a job or assignment. This kind of equipment does not appear on the Resource Gantt
Gantt	See Resource Gantt Chart
HDF	Halliburton Delivery Framework
HIPPS	Halliburton Integrated Proposal System. Application software used to generate proposals in pre-defined templates
HTDM	Halliburton Technical Data Model. HTDM is used as a job, asset, and personnel management system
Home Base	Location out of which a resource is managed
In Jeopardy	A state that a job can be in based on certain violation of business rules
Job	Task; A job, task or operation to which a resource is scheduled
Job List	Task List; A dynamic work area that displays information about all of the jobs that have been transferred from SAP to ClickSchedule
Job Packet	All inclusive of the work order contract, job, log, job summary, and field ticket; both the work order contract and field ticket must be signed by the customer
MDT	Multi-Day Task. A job that spans across more than one day
MST	Multi-Stage Task. Multiple Jobs with time and/or resource dependencies
Mobile Lead User (MLU)	The primary users of the ClickMobile device (for example, Service Leader, Service Supervisor, Engineer). They receive and update job details
Mobile Read Only User (MROU)	Users of ClickMobile device that receive read only information about the job (for example, Field Operator, Field Specialist, Service Operator Assistant)
Non-Availability (N/A)	A designated period when a resource /equipment is not available to be scheduled for jobs. Non-availabilities are also used for the reservation of resources or equipment for future jobs that do not have a sales order number

Term	Definition
Operational Unit	The second level in the Halliburton scheduling hierarchy
Plant	The third (last) level in the Halliburton scheduling hierarchy
Planning Order	A type of SAP order. It allows the scheduling of resources against a single object and PSL scheduling requirements for pad and platform work
Relocation	Temporary transfer of a resource from one plan to another
Resource Gantt Chart	A graphical representation of the schedule details. It displays jobs, resources, and non-availability information
Resource List	A part of the Resource Gantt chart that displays all of the personnel, equipment, and crews defined in ClickSchedule
SAP	Systems Applications and Products. Services enabled business application. Halliburton is interfacing SAP and ClickSchedule
SOS	Sales Order Scheduling. SOS is the Battle Red work stream charged with Scheduling
Sales Order	The SAP document that represents the detailed job to be performed for the customer
Schedulable Resources	A generic name for an individual, crew, piece of equipment, or any other schedulable entity in the service process
Schedulers	Service Coordinators; the primary users of the scheduling application. They typically handle scheduling activities and are in regular contact with the resources
Shift Pattern	Calendar Management functionality that permits users to assign specific shift patterns to crew members or resources
Ship-To	Customer; a site at which the resource is scheduled to work
Sold-To-Party	Person or Company who places an order for services or materials. The customer for whom the job will be performed
Status(es)	Phases that a job progresses through in its lifecycle
SUMMIT	System for Utilizing, Managing, and Moving Information through Technology. Halliburton’s Job Management System
Sub-Activity	Activity for scheduling equipment related to a job (for example, bin spotting, mountain movers)

Legend

Legend describes the specific icons, color schemes, and shading patterns used to indicate the types of resources, job statuses, and types of working time.

The table below explains the different types of legends icons.

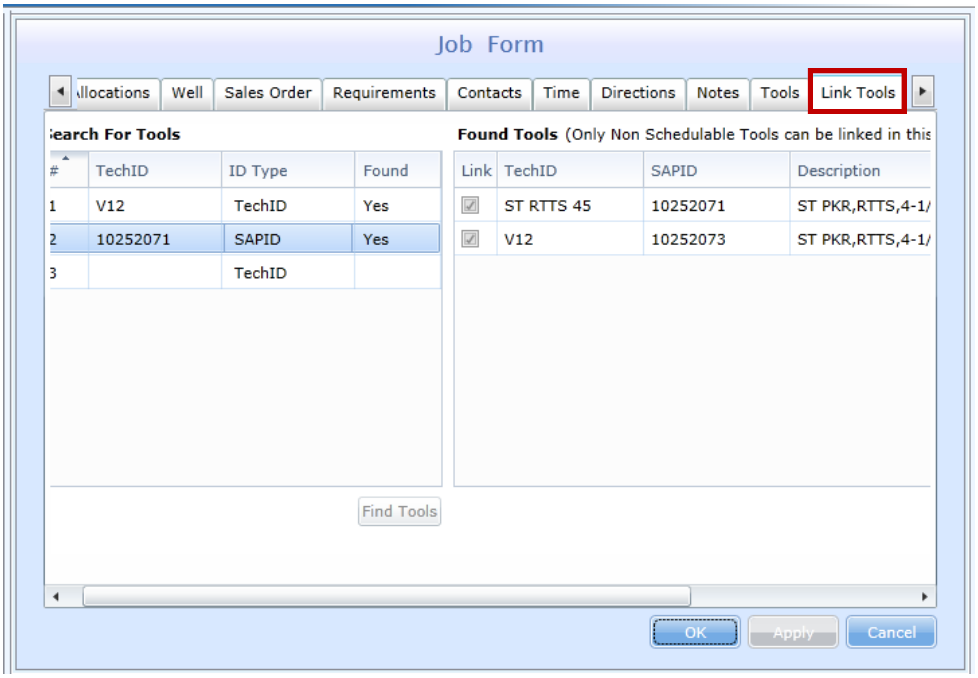
Legend Icon	Description
Resource	
Individual	This icon represents the individual resources.
JD Connected	This icon represents a Job Details user that is currently connected to the Halliburton network.
JD Disconnected	This icon represents a Job Details user that is not currently connected to the Halliburton network.
Crew	This icon represents a crew.
Equipment	This icon represents equipment.
Job Status	
Assigned	• A job has been created in SAP and sent over to the **Job List** in ClickSchedule. • The Scheduler has reviewed and validated the job details. • The Scheduler has assigned the job to a specific crew, individual, and/or equipment(s) by selecting suitable candidates or using drag and drop functionality. • The job status moves from **Unassigned** to **Assigned**.
Informed	The assigned job has been sent to Job Details.
Acknowledged	The MLU (**M**obile **L**ead **U**ser): • Has received and reviewed the job information • Updates the job status to **Acknowledged**
Ready To Go	The MLU: • Proceeded with any necessary preparations relating to the site, equipment, and crew • Finalizes all preparations for the job and updates the job status to **Ready to Go**
On Site	• The MLU confirms that the crew has reached the customer site and updates the status to **On Site**. • **NOTE**: The Scheduler can no longer cancel a job once the status is **On Site**.

Legend Icon	Description
Complete	The MLU: • Has captured every stage of the job and documented any issues • Has confirmed that the crew has completed work on site and has initiated close out process • Has entered exposure hours • Has confirmed that the crew is ready to leave the site
Post Actuals	• The MLU has confirmed that the crew has arrived to the yard. • The Scheduler updates the actuals of the job and the schedule log.
Cancelled	The job may be cancelled in some cases such as per customer request. The Scheduler is responsible for changing the status to **Cancelled** within ClickSchedule for: • Jobs that should not be in ClickSchedule • Duplicate jobs that appear in ClickSchedule
Other Gantt Colors	
Non-Availability	This icon displays the non-availability of a resource.
Relocation	This icon displays that the resource is relocated from another Plant.
Crew Allocation	This icon displays that the resource is allocated to a Crew.
Resource Calendar	
Non-Working hours	This icon displays the non-working hours for a resource.
Optional hours	This icon displays the optional working hours for a resource.

Link Tools Tab - B&C and HCT

In the **Linked Tools** tab the **Search For Tools and Link Tools** function allows specification of multiple tools by **Equipment ID** or **Tech ID**. Through a search function, ClickSchedule will be able to identify the appropriate assets to be linked on a job. The search function will reveal if the equipment is schedulable or non-schedulable and if the **Tech ID** or **Equipment ID** requested was located in the search.

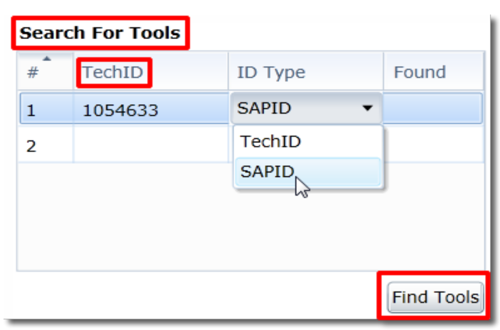
NOTE: Only Non-Schedulable tools can be linked with the job.



To link Non- Schedulable tool(s) on a job:

1. In the **Search for Tools** table, click the first available row.
2. In the **TechID** column, enter the **SAP ID** number of the tool to search.
3. In the **ID Type** column, select **SAP ID** from the dropdown options.
    1. In this example, the **SAP ID** is the number we are searching for.
    2. As an alternative search parameter, enter the **Tech ID** number and select **Tech ID** in the **ID Type** column options.
4. Click on **Find Tools** to begin the search.

NOTE: The **Link Tools** tab in the Job Form has the functionality to import multiple SAP IDs using special import functionality.



When the tool is found, a record of the tool is populated with the tool details displayed in the **Found Tools** pane as shown below.

Found Tools (Only Non Schedulable Tools can be linked in this view)

Link	TechID	SAPID	Description	Plant	Schedulable
☑	COP-2BF-100	1054633	BLIND FLANGE 2 1	01A6-B&C Pleasan	No

If the tool searched is not found, make sure the chosen **ID** number matches the **ID Type** (i.e. **Tech ID** or **SAP ID)**. The **Found** field may indicate the **Tool** record cannot be located as shown in the image below. 'No' indicates the tool is not recorded in SAP.

Search For Tools

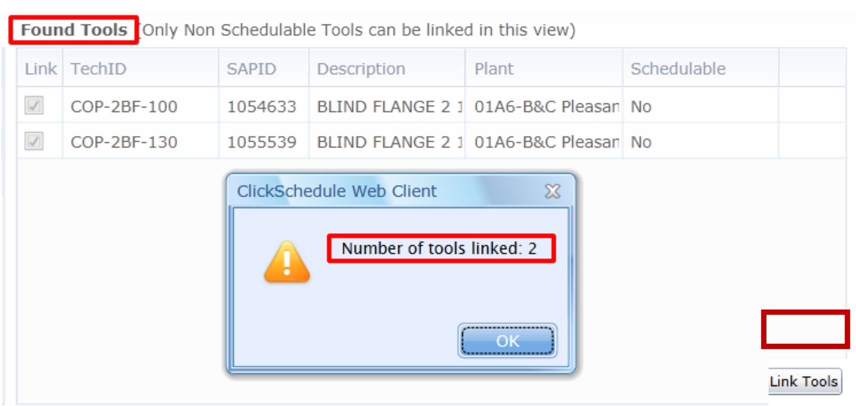
#	TechID	ID Type	Found
1	1054633	SAPID	Yes
2	1054633	TechID	No
3		TechID	

When all the tools required to be linked to a job have been located, double check each **Tool** record under the **Link** column. If the wrong tool is displayed or is decided not to be used as a tool, simply uncheck the **Tool** record in the **Link** column as shown in the **Found Tools** table. Only Tools with **'No'** under the Schedule column may be linked. If **'Yes'** displays in the Schedulable column, the tool must be allocated to the crew/unit.

Found Tools (Only Non Schedulable Tools can be linked in this view)

Link	TechID	SAPID	Description	Plant	Schedulable
☐	COP-2BF-100	1054633	BLIND FLANGE 2 1	01A6-B&C Pleasan	No
☑	COP-2BF-130	1055539	BLIND FLANGE 2 1	01A6-B&C Pleasan	No

If satisfied with the list of tools needed for the job, click the **Link Tools** button. A count of the tools that will be linked to the job is displayed in an **alert** confirmation indicating the number of tools linked. Validate and click the **OK** button. This allows the confirmed tools to be added to the **Tools** tab.



If necessary, continue to add tools using the steps above and/ or continue to edit the **Job** Form as needed.

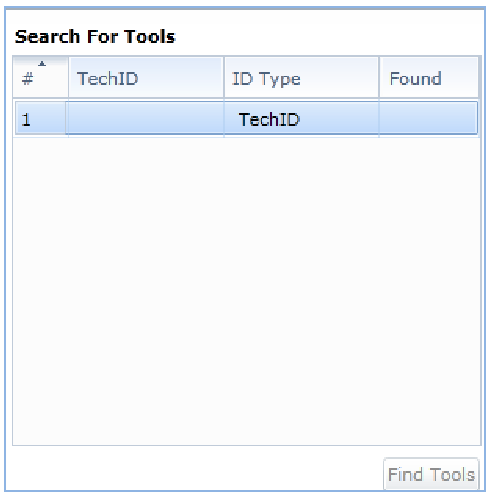
TIP: To add multiple entries for searching, user can create a template in Excel and paste into form.

1. Create a template with two columns. (first column = SAP id number, second column = 'SAPID')

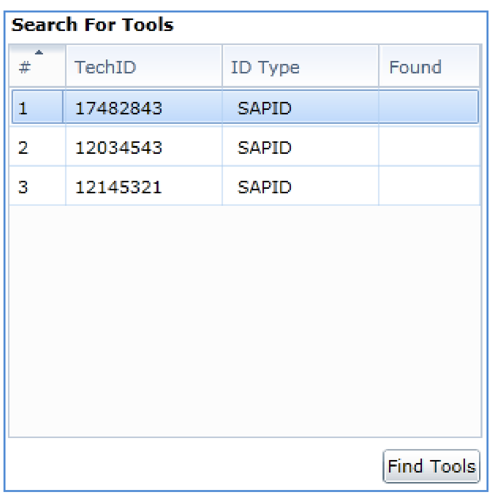
17482843	SAPID
12034543	SAPID
12145321	SAPID

2. **Highlight and copy**, both columns and all rows in Excel.

3. Highlight the first row in the **Search for Tools** form.



4. **Paste** (Ctrl+V) the copied Excel fields.



5. Click the **Find Tools** button.

Loading Data in ClickSchedule

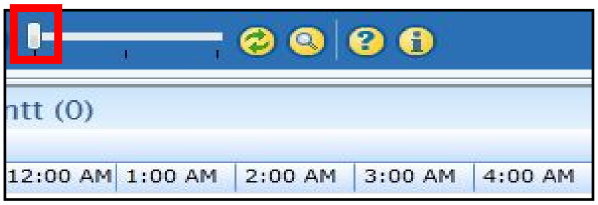
There are four main steps that need to be performed to load the data in ClickSchedule.

1. Ensure that you are in the **Scheduling** view.
2. Adjust the **Gantt zoom in/out** bar.
3. Select the required dates in the **Calendar** panel.
4. Select the required business structure in the **Business Structure** panel.

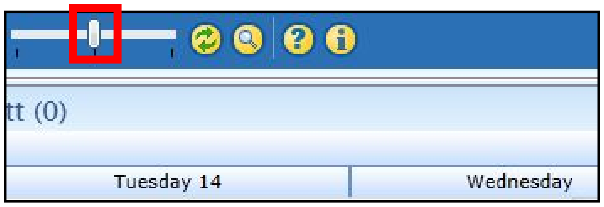
Gantt zoom in/out

Set the **Gantt zoom in/out** to display the jobs on the Gantt in an hourly, daily, or weekly view.

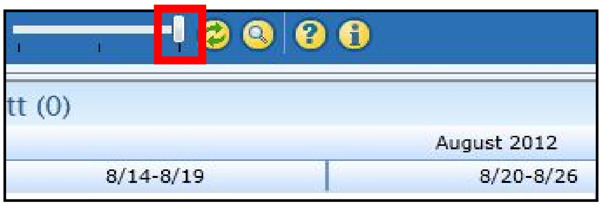
Position the scroll bar to the left to see the resources in an **hourly** view (for a maximum of six days).



Or, position the scroll bar in the middle to see the resources in a **daily** view (for a maximum of almost two months).

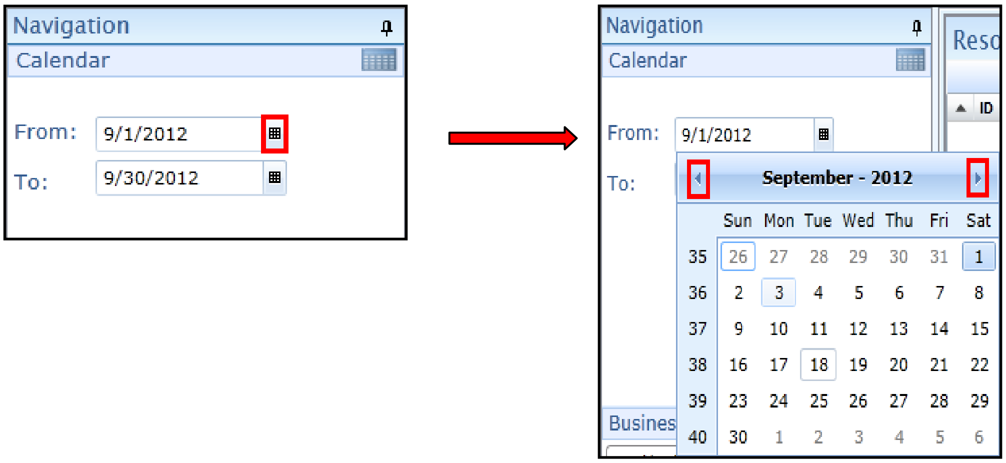


Or, position the scroll bar to the right to see the resources In a **weekly** view.



Use the following steps to select the required date in the **Calendar Pane**:

1. Click the **Calendar** button next to the **From** field. A calendar displays with the arrow buttons provided to change the month, if needed.



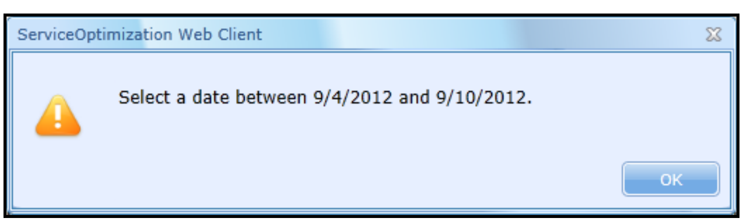
2. Select the required date. The selected date will appear in the **From:** field.

3. Repeat steps 1 and 2 to select the required date for the **To:** field.

Notes:

- You can also enter a date directly into the **From:** or **To:** field.

- If you receive the following error, either enter a date within the suggested time frame OR change your **Gantt zoom in/out**.



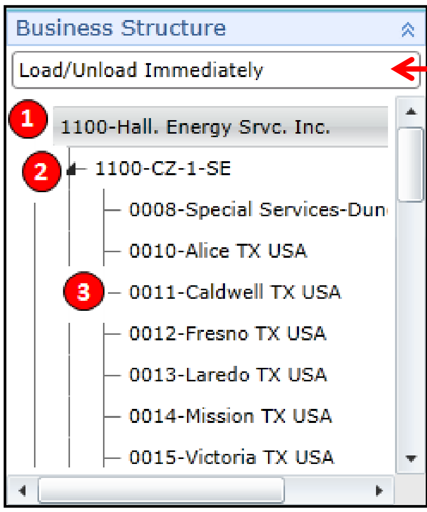
Use the following steps to select the plant(s) under the **Business Structure** panel:

1. Click the arrow next to the required Company Code (this example uses **1100-Hall. Energy Srvc. Inc.**). The second level (Operational Unit) in the business hierarchy displays.

2. Click the arrow next to the required Operational Unit (this example uses **1100-CZ-1-SE**). The last level (Plant) in the business hierarchy displays.

3. Double-click the required Plant (this example uses **0011-Caldweel TX USA**). The required business structure is selected.

Note: You can double-click additional plants, if needed.



Note: By default, the system is set to load/unload the selected data immediately. You can change the option to **Load/Unload on Next Refresh**, if needed.

The data related to the selected dates and plant(s) is loaded.

Note: Data can be unloaded from the current view by double clicking on a plant.

Locking a Job

In a standard job process flow, jobs are automatically locked (to a resource and/or time) when the job hits the **On Site** status. In addition, Schedulers can lock a job, regardless of its status, using the **Locking** flag property.

The Scheduler can lock a job to a specific time and crew. This action prevents the accidental scheduling of the job to another resource or time.

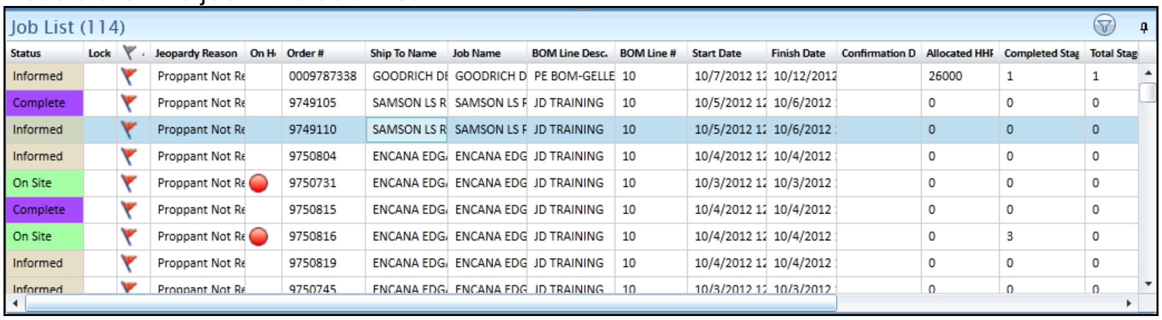
The locking of a job requires the Scheduler to enter a comment.

Locking functionality is useful when:

- Time coordination is required between different Product Service Lines (PSLs)
- It is critical for resources to arrive on site on a specific time

To lock a job:

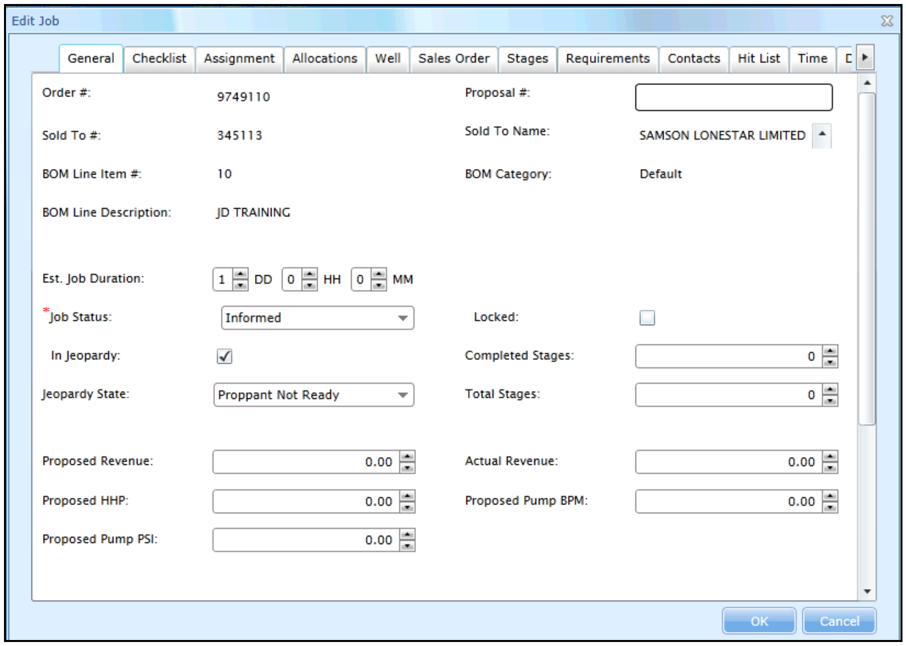
1. Double-click the job in the **Job List**.



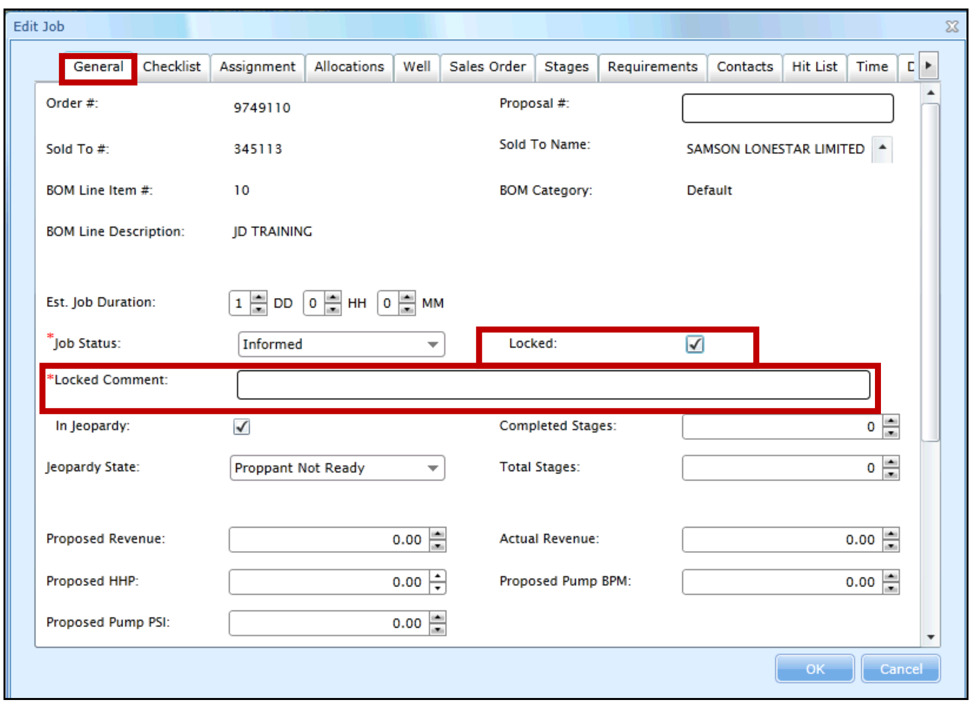
Job List (114)

Status	Lock		Jeopardy Reason	On H	Order #	Ship To Name	Job Name	BOM Line Desc.	BOM Line #	Start Date	Finish Date	Confirmation D	Allocated HHF	Completed Stag	Total Stag
Informed			Proppant Not Re		0009787338	GOODRICH DI	GOODRICH D	PE BOM-GELLE	10	10/7/2012 12	10/12/2012		26000	1	1
Complete			Proppant Not Re		9749105	SAMSON LS R	SAMSON LS F	JD TRAINING	10	10/5/2012 12	10/6/2012		0	0	0
Informed			Proppant Not Re		9749110	SAMSON LS R	SAMSON LS F	JD TRAINING	10	10/5/2012 12	10/6/2012		0	0	0
Informed			Proppant Not Re		9750804	ENCANA EDG	ENCANA EDG	JD TRAINING	10	10/4/2012 12	10/4/2012		0	0	0
On Site			Proppant Not Re		9750731	ENCANA EDG	ENCANA EDG	JD TRAINING	10	10/3/2012 12	10/3/2012		0	0	0
Complete			Proppant Not Re		9750815	ENCANA EDG	ENCANA EDG	JD TRAINING	10	10/4/2012 12	10/4/2012		0	0	0
On Site			Proppant Not Re		9750816	ENCANA EDG	ENCANA EDG	JD TRAINING	10	10/4/2012 12	10/4/2012		0	3	0
Informed			Proppant Not Re		9750819	ENCANA EDG	ENCANA EDG	JD TRAINING	10	10/4/2012 12	10/4/2012		0	0	0
Informed			Proppant Not Re		9750745	ENCANA EDG	ENCANA EDG	JD TRAINING	10	10/3/2012 12	10/3/2012		0	0	0

The **Edit Job** form displays.



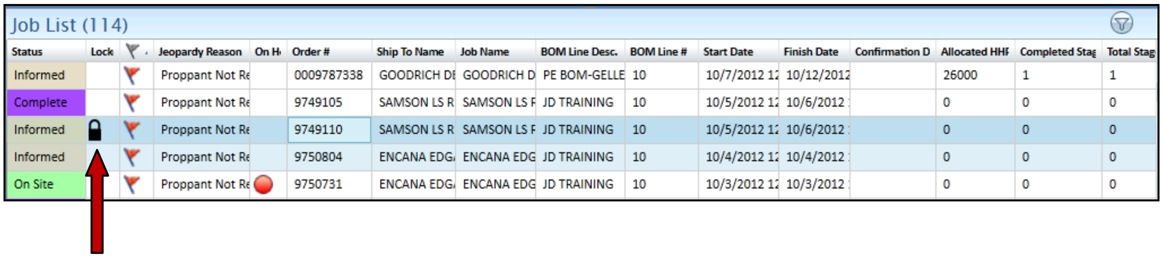
2. On the **General** tab, select the **Locked** checkbox.



Note: After selecting the **Locked** checkbox, the **Locked Comment** field appears as a Required field.

3. Enter the comment explaining why the job is locked in the **Locked Comment** field.

When a job is locked, it will have a lock icon in the **Job List** (as shown below).



Job List (114)

Status	Lock		Jeopardy Reason	On H	Order #	Ship To Name	Job Name	BOM Line Desc.	BOM Line #	Start Date	Finish Date	Confirmation D	Allocated HHI	Completed Stag	Total Stag
Informed			Proppant Not Re		0009787338	GOODRICH DI	GOODRICH D	PE BOM-GELLE	10	10/7/2012 12	10/12/2012		26000	1	1
Complete			Proppant Not Re		9749105	SAMSON LS R	SAMSON LS F	JD TRAINING	10	10/5/2012 12	10/6/2012		0	0	0
Informed			Proppant Not Re		9749110	SAMSON LS R	SAMSON LS F	JD TRAINING	10	10/5/2012 12	10/6/2012		0	0	0
Informed			Proppant Not Re		9750804	ENCANA EDG	ENCANA EDG	JD TRAINING	10	10/4/2012 12	10/4/2012		0	0	0
On Site			Proppant Not Re		9750731	ENCANA EDG	ENCANA EDG	JD TRAINING	10	10/3/2012 12	10/3/2012		0	0	0

Note: To unlock a job, open the appropriate **Edit Job** form by double-clicking the job and uncheck the **Locked** checkbox. Then, click the OK button.

Menu Bar

The **Menu** bar provides easy access to ClickSchedule functionality.

The **Menu** bar includes the following menus:

1. The **Main** menu includes the following options:

    - **Refresh**: Used to refresh the on-screen displayed data

    - **Show Search Bar: Used to open/close the search area located below the Menu bar**

    - **Start/Stop Logging: Used to start/stop log mode**

    - **Exit: Used to close the application**

2. The **View** menu includes the following options:

    - **Show on Resource Gantt**: Highlights the selected job in the **Job List** on the **Resource Gantt** chart

    - **Change to 24 x 7 mode**: Sets the mode for displaying time intervals **(24x7 (all hours or all days))** on the **Gantt** chart.

    - **Enable/Disable highlighting of MST dependencies on the Gantt chart**: Enables/disables the highlighting of the jobs in a multi-stage task (MST), when the mouse is hovered over one of the tasks in the chain

    - **Enable/Disable Magnifying Glass Pop up on Gantt**: Enables/disables the magnifying glass pop up on the **Resource Gantt chart**

    - **Show on Resource List**: Highlights the assigned resource in the **Resources List** when a scheduled job is selected in the **Job List**

    - **Show crew on Resource List**: Shows the crew member on the **Resources List**

    - **Show on Job List**: Highlights the corresponding job on the **Job List** when a job is selected on the **Resource Gantt chart**

    - **Show on Map**: Shows the location of a selected job or resource on the map

3. The **Schedule** menu includes the following options:

    - **Unschedule Job(s):** Enables the unscheduling a job

    - **Check Rule Violations**: Lists any scheduling rules that have been violated by the currently scheduled job in the **Rules Violations** dialog box. (For example, violations involving travel time, vacation time, and early start/end date time)

- **Disable Snap Mode**: Disables the automatic adjustment of the timing of a job in the schedule to prevent the scheduling of overlapping jobs and allowing travel time

4. The **Monitor** menu includes the following options: (NOTE: These options will be available in the future)

- **Change Route Color**: Enables you to change the color of the line used to mark the selected route
- **Get Route for Day**: Retrieves the daily route for the selected resource
- **Clear Resource Route**: Clears the selected route marking from the map
- **Clear All Routes**: Clears all route markings from the map
- **Get Route Directions**: Displays the driving direction for the selected route
- **Get A-B Route**: Displays the route between two points on the map
- **Change A-B Route Color**: Enables you to change the color of the A-B route on the map
- **Remove A-B Route**: Removes the A-B route from the map display
- **Remove Pushpin**: Removes a pushpin from the map
- **Get Closest Resources**: Identifies the resource located closest to the job location
- **Show Assigned Jobs**: Creates a tab in the **Job List** which contains the jobs assigned to the selected resource
- **Show/Hide Time Interval**: Displays/hides the time interval slider which enables the user to change the time period for which data is displayed on the map

5. The **Workload Management** menu includes the following options:

- **Edit**: Enables the user to edit the properties of an existing job
- **Save Job List**: Saves the **Job List** or selected job entries as an HTML file
- **Print Job List**: Prints the **Job List** or selected job entries
- **Copy Job Identifier**: Copies the job identifier information to the clipboard, enabling the user to copy it into other applications
- **Show Job Dependencies**: Lists the jobs that make up MST chain in a separate **Job List** tab

6. The **Help** menu includes the following options:

- **Help**: Opens the online application help
- **About ClickSchedule**: Displays the software version information

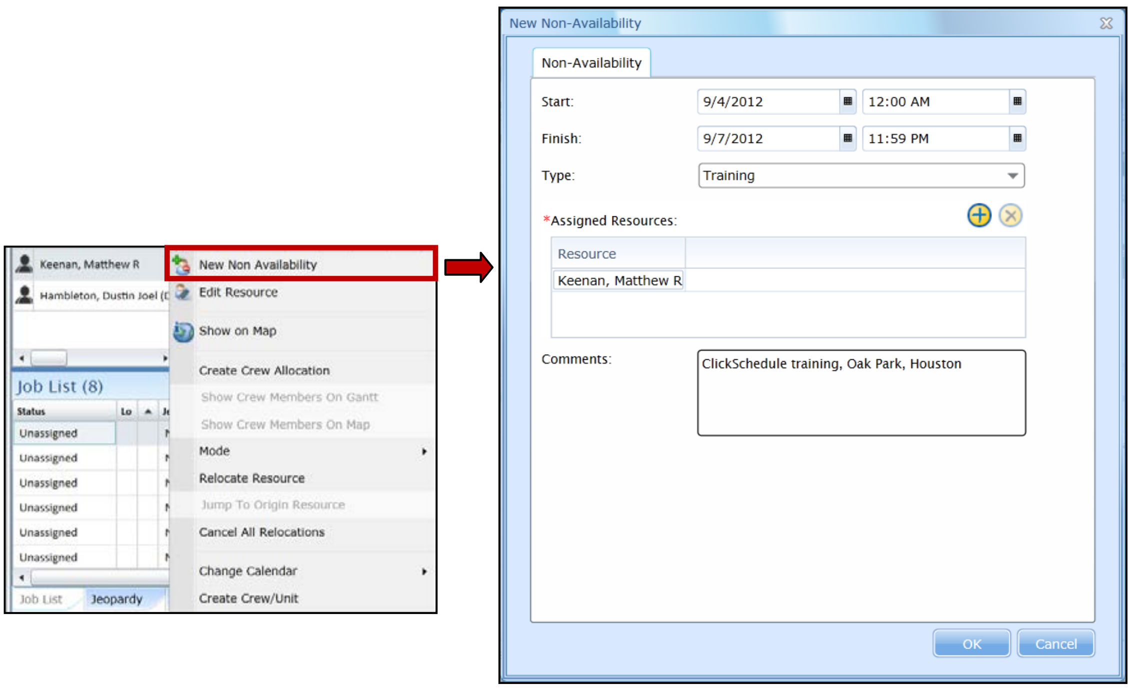
New Non-Availability Form

Non-availability is a designated time when a resource is not available to be scheduled for a job. The schedulers create the non-availabilities against resources using the **New Non-Availability** form.

To access the **New Non-Availability** form:

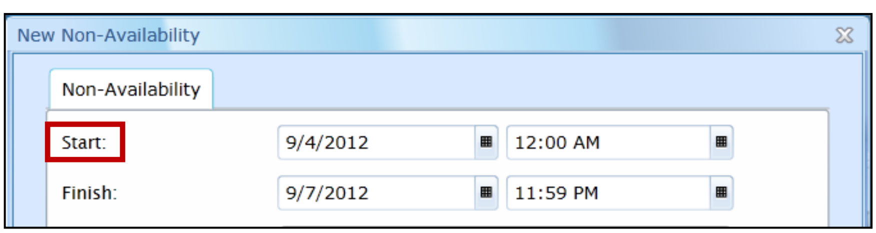
1. In the **Scheduling** view, select the desired resource to make non-available from within the **Resource** list and then right click.

2. Select **New Non-Availability** from the menu**.**

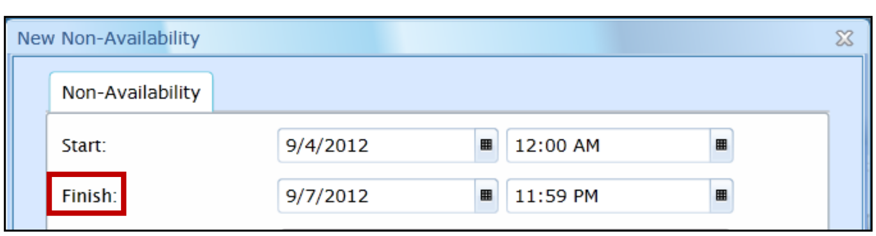


3. Complete the **New Non-Availability** form as follows:

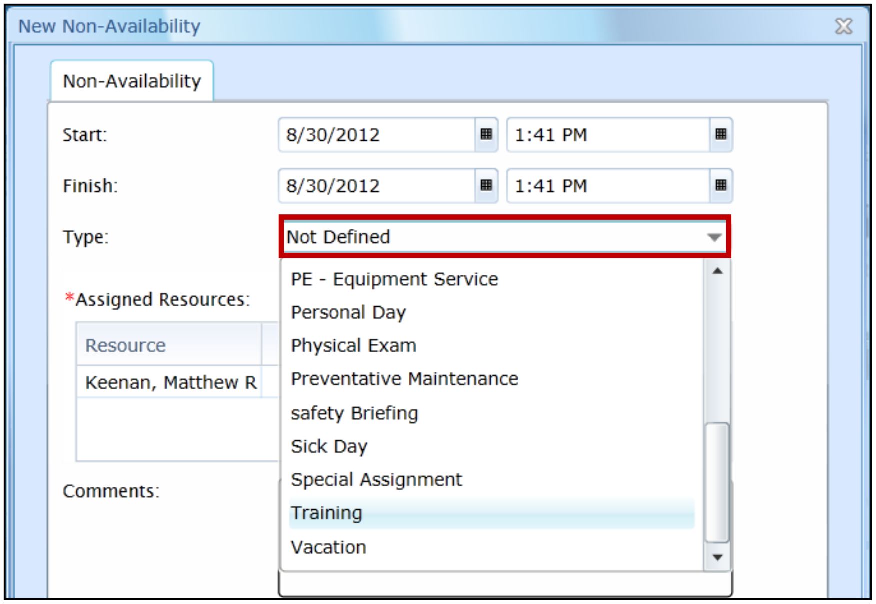
   - **Start**: Enter the beginning date and time of non-availability



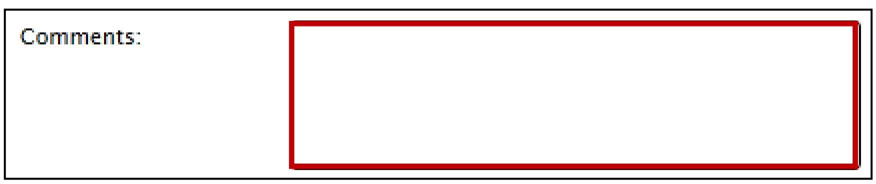
   - **Finish**: Enter the end date and time of non-availability



- **Type**: From the dropdown, select the reason for non-availability



- **Comments**: In the text area, enter any additional notes related to the non-availability of the resource.

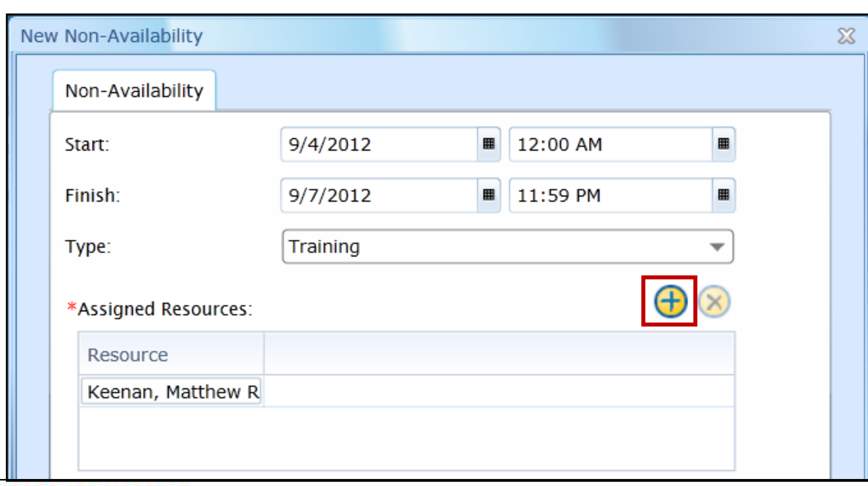


You may make multiple resources non-available, if the non-availability is for the same time frame and reason.

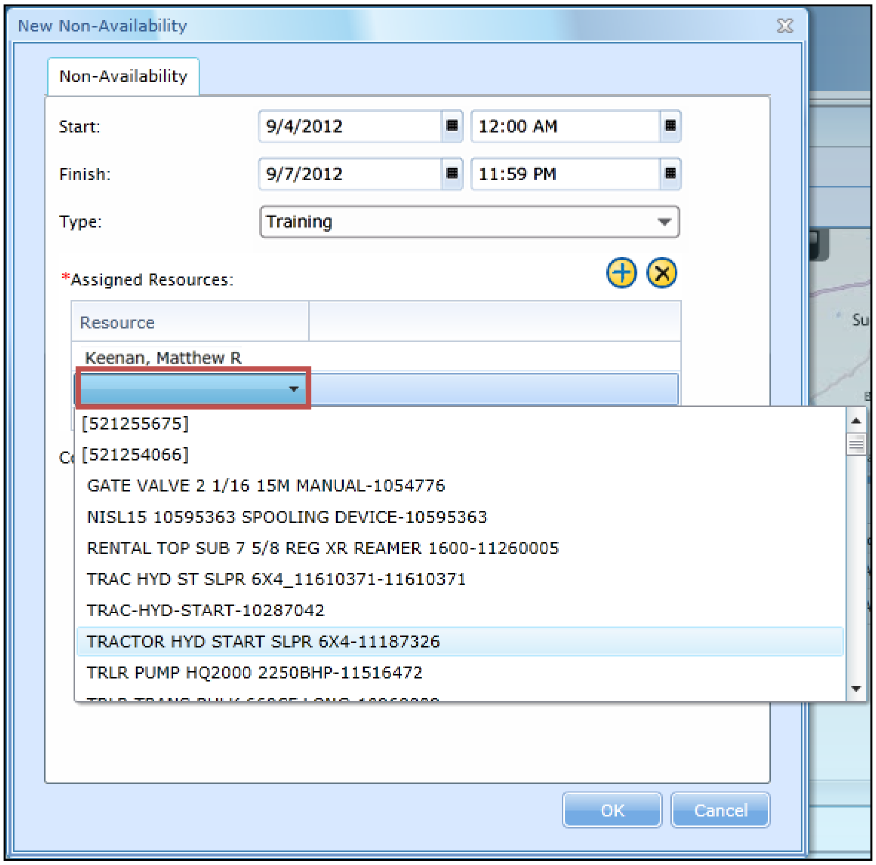
> **Note**: The resources that may be made non-available are dependent upon the data set loaded. In other words, you will not be able to make a schedulable piece of equipment non-available, unless that equipment is displayed in the **Resource Gantt**.

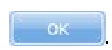
To add additional non-availabilities:

1. Click  to assign additional resources to the Non-Availability.



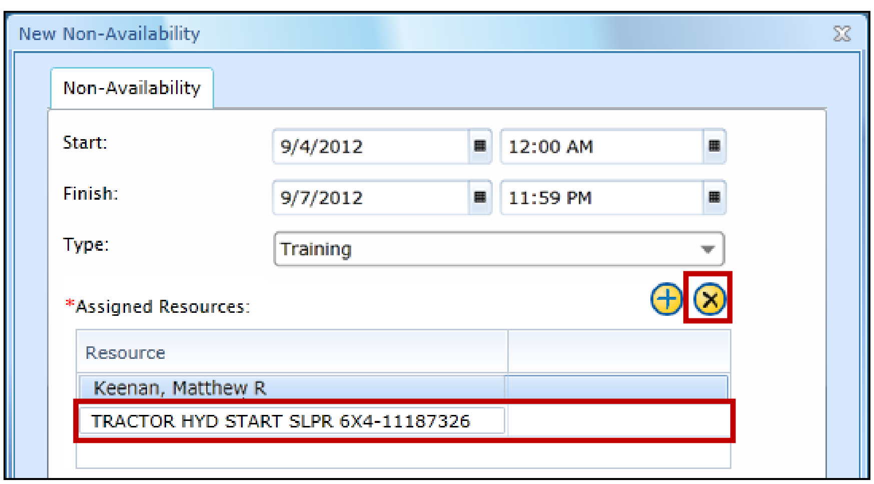
2. Click the  button, and from the dropdown; select the desired resource.



3. Add as many resources as necessary and then click .

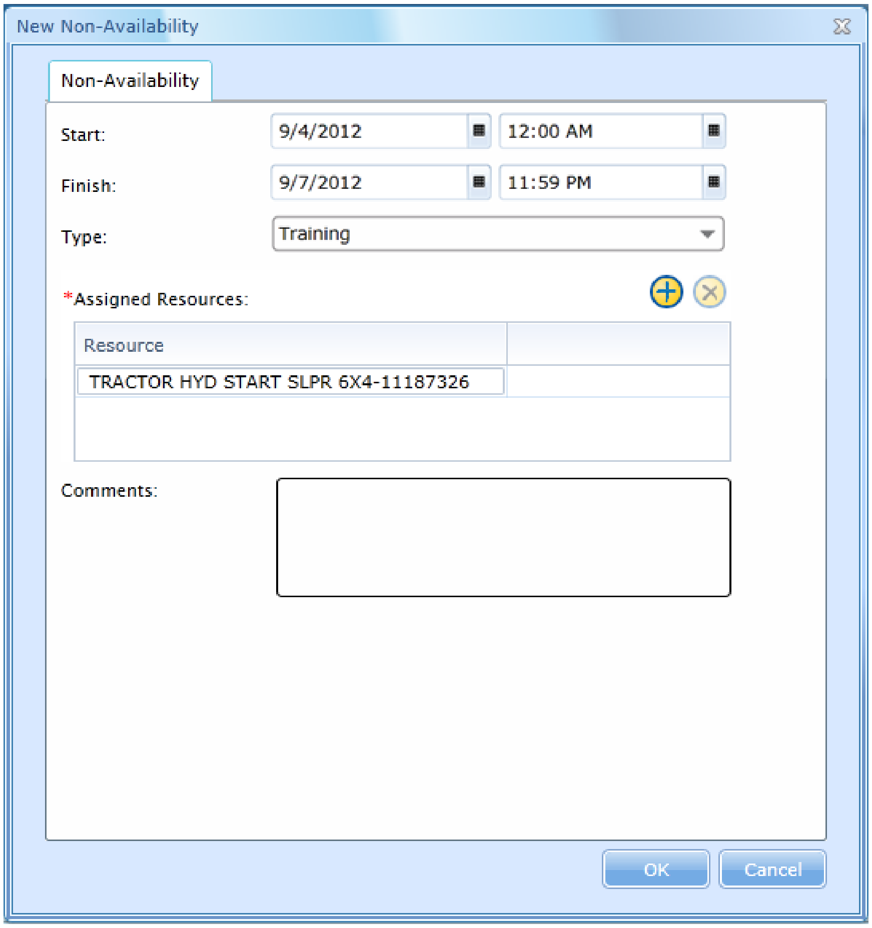
To delete **Non-Availability** items:

1. Select the **Resource** to be deleted then click  to remove the item.



2. Repeat resource deletions as necessary and then click 

.



Partial Post Actuals & Final Post Actuals

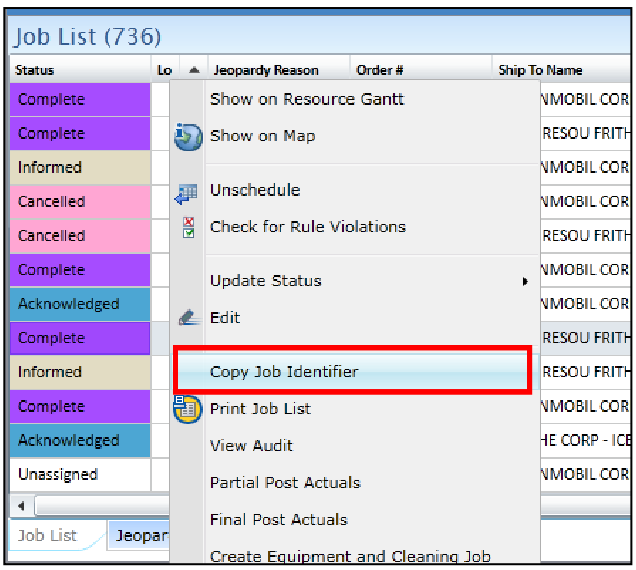
The **Partial Post Actuals** feature provides the capability to post resource utilization records from **ClickSchedule** to **SAP** (as needed) throughout the duration of a job. It provides the posting of **Actuals** up to the current date without closing the job while the job is still "On Site". Partial Posting of any job can only occur when the job has a status of '**On-Site**' or '**Complete**'.

Note: Partial Post Actuals is a prerequisite process step in order for the **Final Post Actuals** of the **Halliburton Resource Utilization** (HRU) records to completely Post Actuals back to SAP.

Partial Posting of **Actuals** can be performed on any job from the:

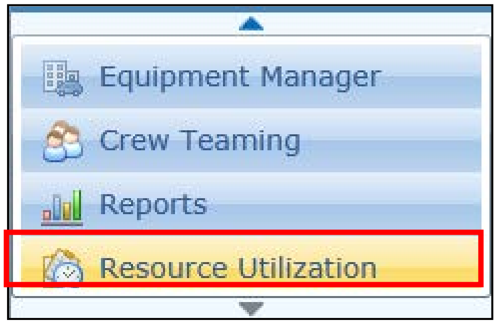
- **Resource Gantt**
- **Job List**
- **Job Builder** view

1. Validate all of the HRU records for which the **Partial Post Actuals** will be performed for. From the **Resource Gantt**, **Job List** or **Job Builder** view, right-click desired job and choose **Copy Job Identifier** from the menu.

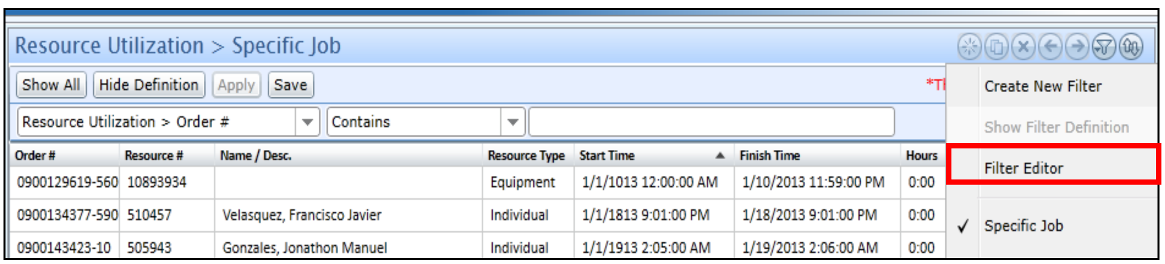


This action copies the job's **Sales Order** number into the **Windows Clipboard** memory.

2. Click the **Resource Utilization** view from the **View** list.

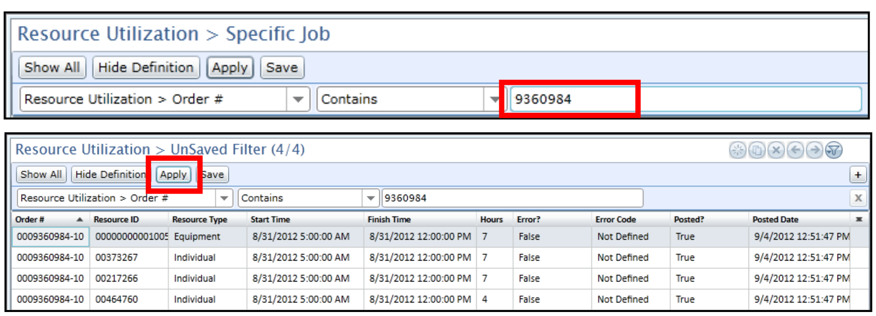


3. Click the **Filter** icon from the **Filter** dropdown list and choose the pre-defined filter option **Specific Job.**



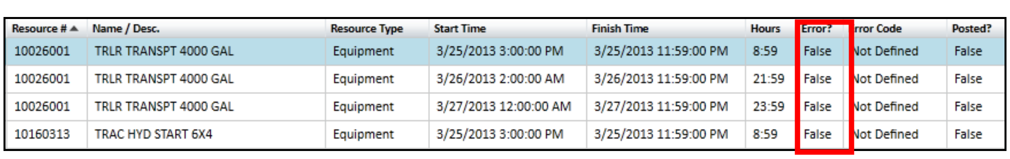
The filter is now set up to add the **Sales Order** number as a parameter for future searches.

4. Insert the cursor in the last **parameter** field and apply **CTRL + V**. This pastes the **Sales Order** number from Windows **Clipboard** memory.
5. Click **Apply**. The **Resource Utilization** records for the **Sales Order** will display.

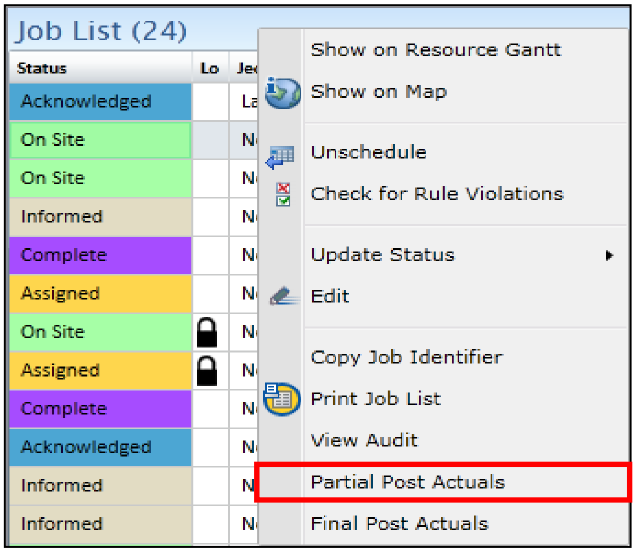


6. Prior to posting actuals, use **Resource Utilization** view to verify and correct all appropriate HRUs.

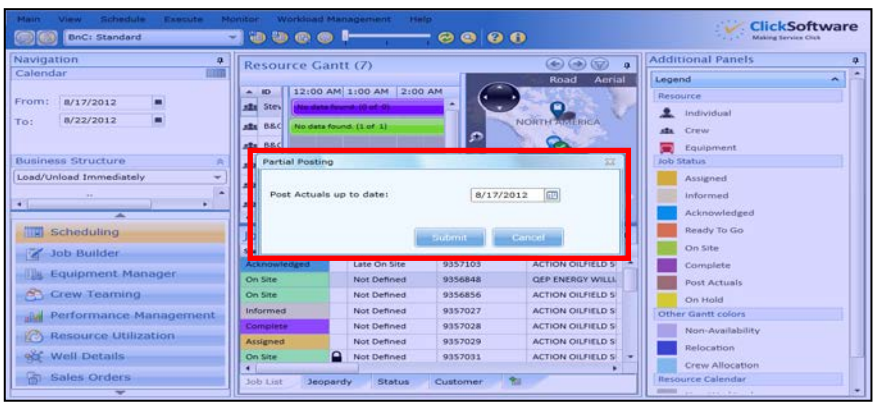
Note: Prior to posting actuals, all appropriate HRUs must display **False** in the **Error?** column.



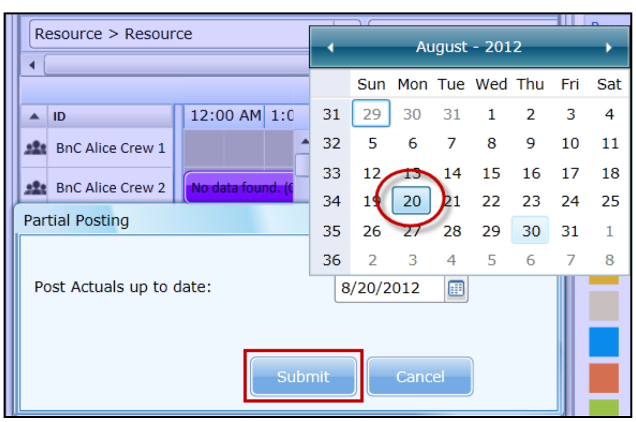
7. From the **Scheduling** view, right click on the job and choose **Partial Post Actuals** from the menu.



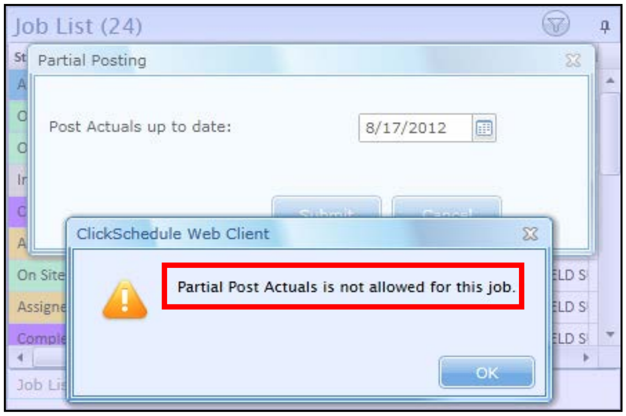
8. A **Partial Posting** calendar pop up will appear displaying the current date.



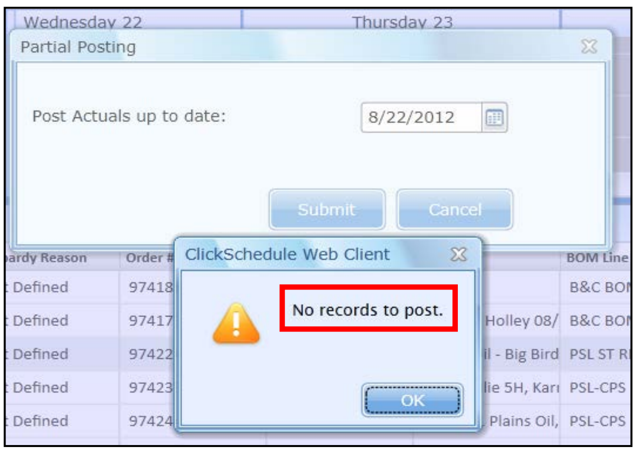
9. If there is a need to Partial Post up to a specified date, click the **Calendar** control and select the **Partial Post Actuals** date. **Note**: The selected date must be the current day or prior.



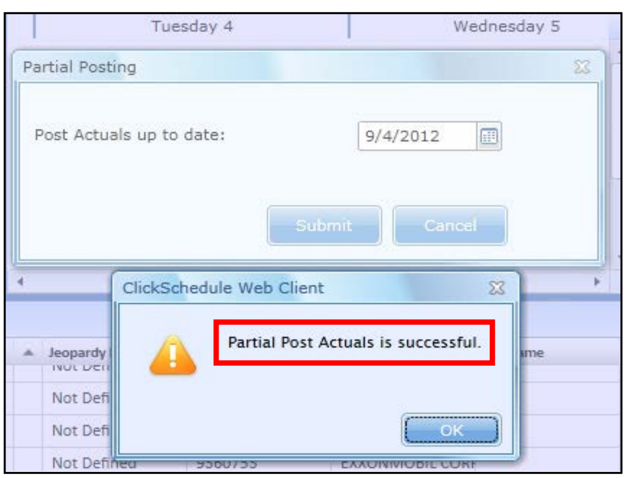
10. In the event that conditions for the job are not valid for posting, the following message is displayed:



11. If **HRUs** have not been created and do not exist in **Resource Utilization** view, the following message is displayed:

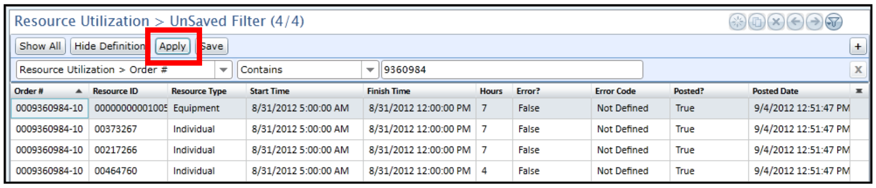


12. When **HRUs** records have been successfully passed from ClickSchedule to SAP, the following message is displayed:



Once **Partial Post Actuals** is applied, a review of **HRUs** is required before **Final Post Actuals**.

1. Return to the **Resource Utilization** view. With the Sales Order still open, click the **Apply** button.



2. The table shown below represents a **Sales Order** where all of the **HRUs** have successfully posted to SAP via the **Partial Post Actuals** method.

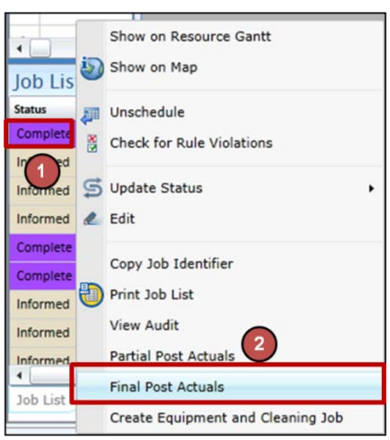
Hours	Error?	Error Code	Posted?	Posted Date	SAP Confirmed ?	SAP Confirmed Da
8:00	False	Not Defined	True	3/28/2013 4:33:	True	3/28/2013 4:33:5
0:00	False	Not Defined	True	3/28/2013 4:33:	True	3/28/2013 4:33:5
8:00	False	Not Defined	True	3/28/2013 4:33:	True	3/28/2013 4:33:5
0:00	False	Not Defined	True	3/28/2013 4:33:	True	3/28/2013 4:33:5

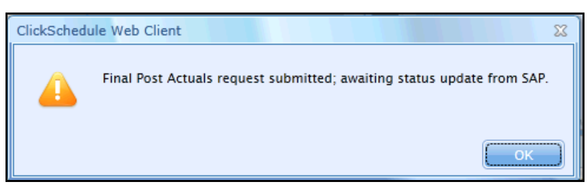
- In the event that a record does not validate successfully, '**True**' is returned to the **Error Code** column (with **Error Code** displayed) and the **Posted?** column displays '**False**'. If errors occur, please review **Resolve Resource Utilization Errors** QRC**.**

  Note: Once all records post to SAP, they can no longer be edited in ClickSchedule. If any record requires additional corrections, contact the appropriate Regional OTC Champ to apply the correction in SAP.

3. Once records show 'True' in the **Posted?** Column and in the **SAP Confirmed?** column, return to the **Scheduling view**.

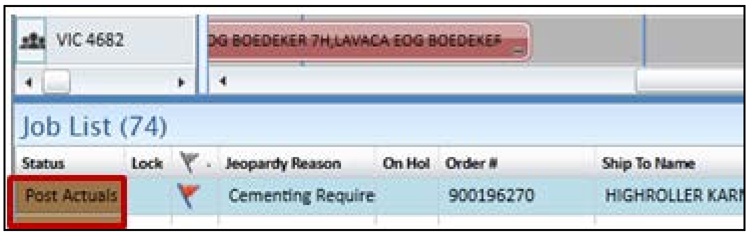
4. Right-click on the completed job and select **Final Post Actuals**. If Final Post is successful, a confirmation window will display the message, "Final Post Actual request submitted; awaiting status update from SAP".





5. Click  to continue.

Visual representation of **Posted Actuals** on a job displays brown on the **Resource Gantt** and **Job List.**



The following definitions define the columns of the **Resource Utilization** table:

Resource Utilization (200/655163)

Order #	Resource #	Name / Desc.	Resource Type	Start Time	Finish Time	Hours	Error?	Error
0900129619-560	10893934		Equipment	1/1/1013 12:00:00 AM	1/10/2013 11:59:00 PM	0:00	False	Not I
0900134377-590	510457	Velasquez, Francisco Javier	Individual	1/1/1813 9:01:00 PM	1/18/2013 9:01:00 PM	0:00	False	Not I
0900143423-10	505943	Gonzales, Jonathon Manuel	Individual	1/1/1913 2:05:00 AM	1/19/2013 2:06:00 AM	0:00	False	Not I
0900199790-10	10971679	TRK CH HEST-LOGGING ULTRALINE ELECTRIC	Equipment	2/8/2000 8:30:00 AM	2/8/2013 8:30:00 AM	0:00	False	Not I
0900212033-10	11939943	ADPTR SP 15K 5 1/8 X 4 1/16	Equipment	2/16/2000 12:00:00 AM	2/16/2013 12:00:00 AM	0:00	False	Not I

- **Order #**: Displays the **Sales Order** of the job
- **Resource ID**: Displays the unique identifier assigned to the resource
- **Name / Desc.**: Last Name, First Name or description of the resource
- **Resource Type**: Displays the type of resource
- **Start Time**: Displays the beginning time and date of the **Exposure Hours** for the resource
- **Finish Time**: Displays the ending time and date of the **Exposure Hours** for the resource
- **Hours**: Displays the number of **Exposure Hours** for the resource
- **Error**: If there is a validation error, '**True**' is returned; otherwise, '**False**' is displayed
- **Error Code**: In the event of a validation error, the **Error Code** is returned; otherwise, '**Not Defined**' is displayed
- **SAP Confirmed?**: If SAP has sent confirmation of receiving Partial Post Actuals, '**True**' is returned; otherwise, '**False**' is displayed
- **SAP Confirmation Date:** Displays date and time stamp of SAP Confirmation.
- **Posted?**: If **Partial Post Actuals** has successfully occurred, '**True**' is returned; otherwise, '**False**' is displayed
- **Posted Date**: Displays a time and date stamp for when **Partial Post Actuals** were committed

Maintain Base Crew Long Term – Production Enhancements

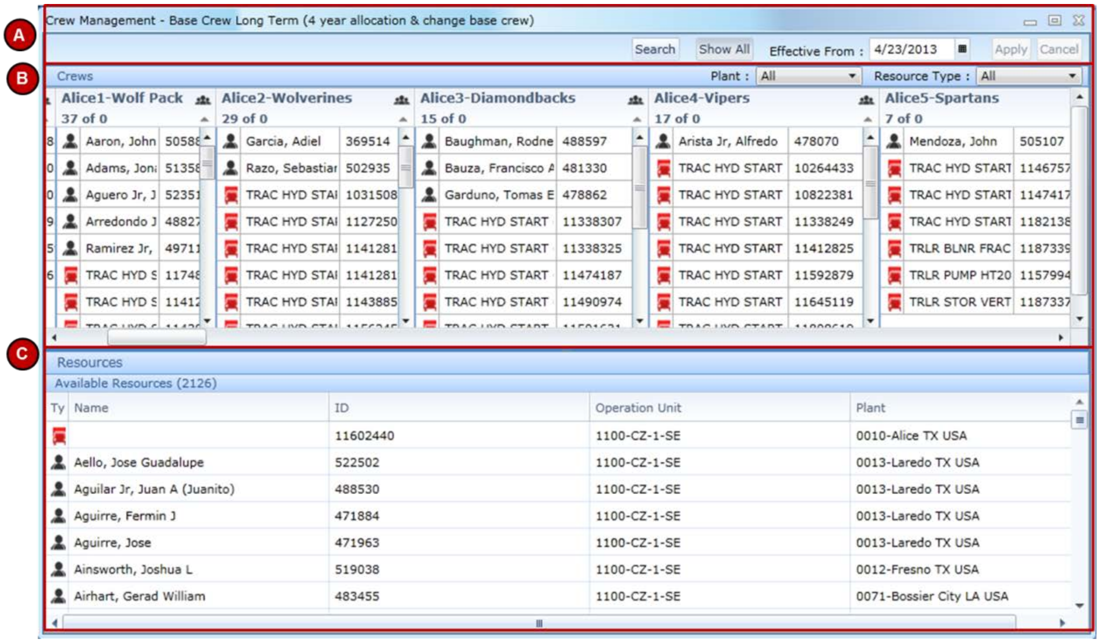
Base Crew Long Term is a feature utilized by PE to maintain a 4 year allocation of the crew assignments.

This functionality will allow for the Scheduler to allocate resources to different crews and/or time periods and change the base view of the crew. Allocations can be made four years from the effective date.

This new functionality will allow for Schedulers to:

- View and modify the makeup of a crew
- Filter crews to search for resources from both the Crew Panel and Available Resource Panel
- Manipulate the column grids and sort the resources in a crew by alpha numeric

The *Crew Management – Base Crew Long Term window* is separated into three panels: **Menu Bar**, **Crews** and **Resources**.



A. **Menu Bar:** Displays functional buttons and effective date.

B. **Crews Panel**: Displays all resources with an assigned base crew.

C. **Resources Panel**: Displays all available resources not assigned to a base crew.

Note: The *Crew Management – Base Crew Long Term* window is based on the loaded data and filters applied in the Scheduling View.

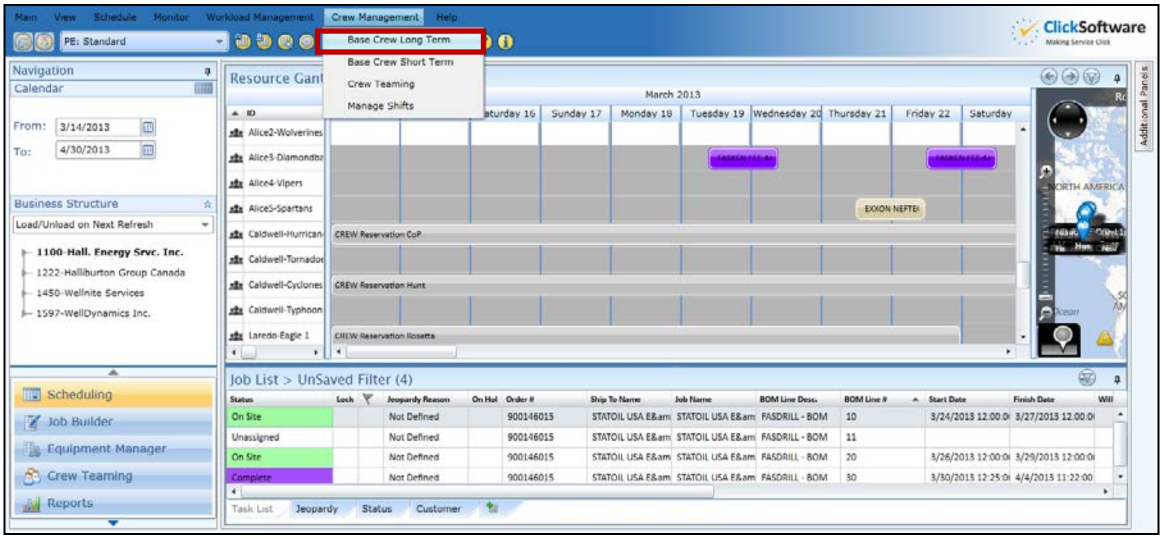
The **Show All** button in the *Crew Management – Base Crew Long Term* window clears all filters and displays all resources.

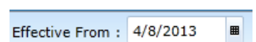
Use the following steps to maintain the base crew long term allocation:

3. Load the required data in ClickSchedule.

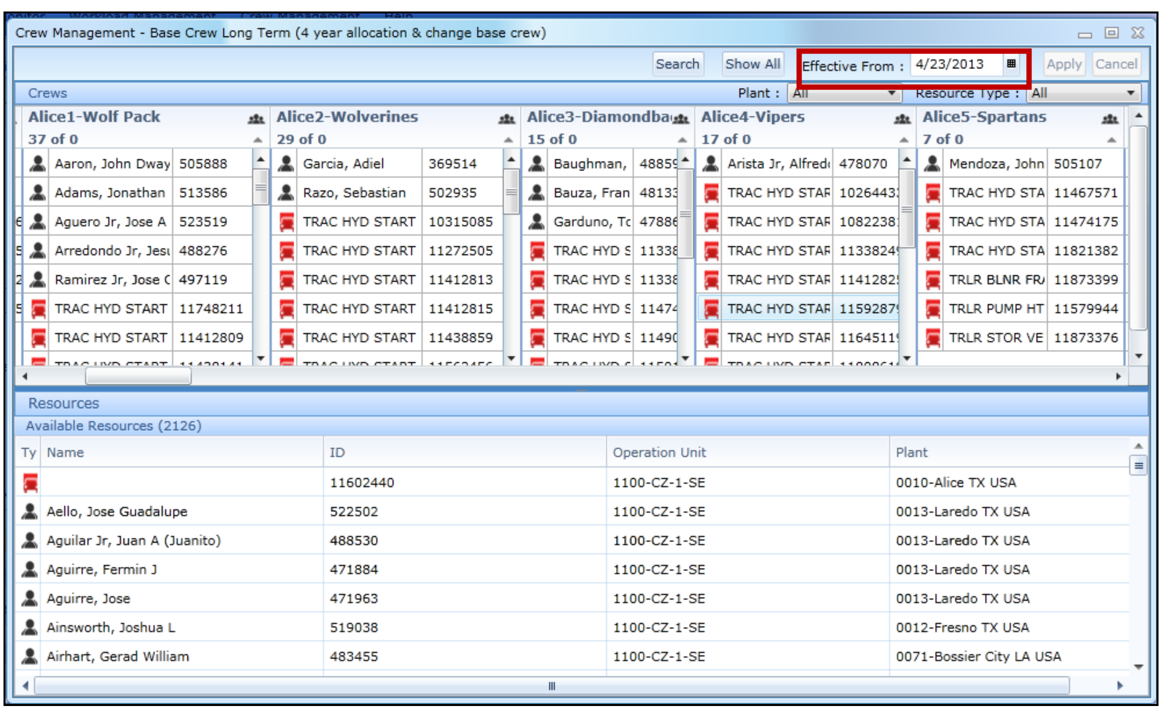
Note: Review the **Loading Data QRC** for additional information.

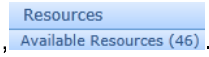
4. From the menu bar, click **Crew Management** and select **Base Crew Long Term** from the list of options.



5. Click in the **Effective From** field to update the start date, .

Note: The **Effective From** field defaults to today's date. The system will create a 4 year allocation to the resource from the **Effective From** date selected.



6. Select the resource in the **Available Resources** section, 

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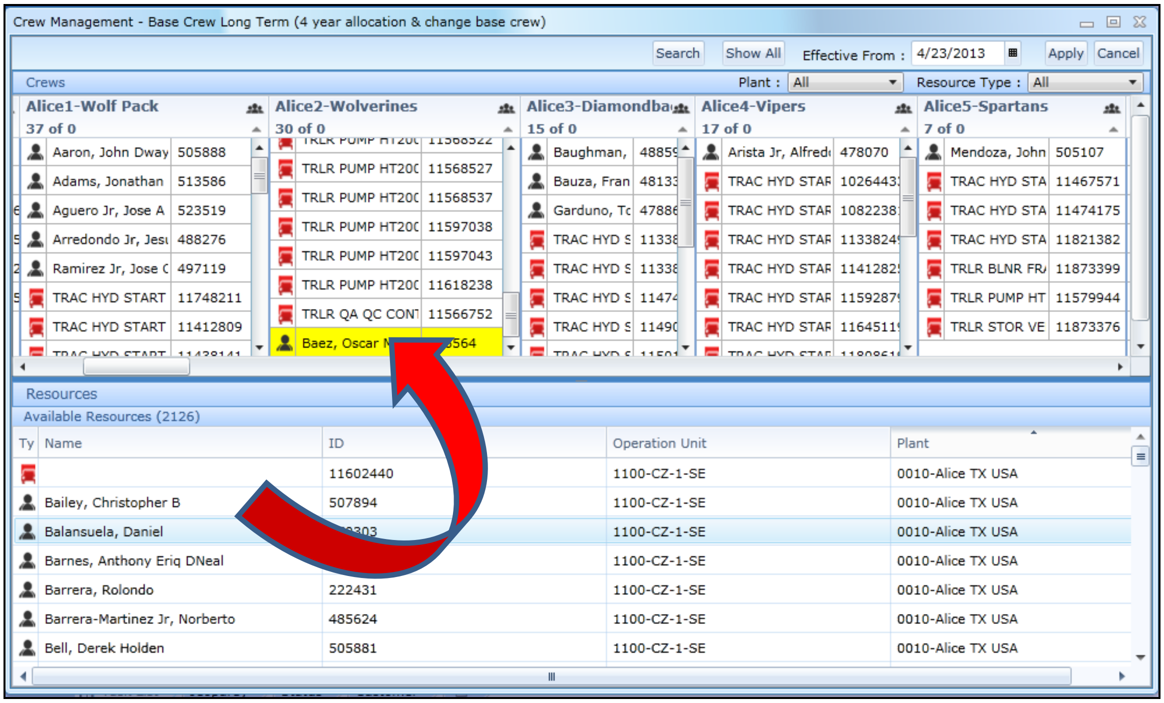
Note: In the **Resources** panel, clicking on the column(s) titles sorts the data in ascending or descending order.



7. Use the drag and drop feature to add the resource to the appropriate crew. The resource is highlighted in yellow until changes are applied.

Note: Resources can also be dragged and dropped horizontally from one Crew to another Crew.

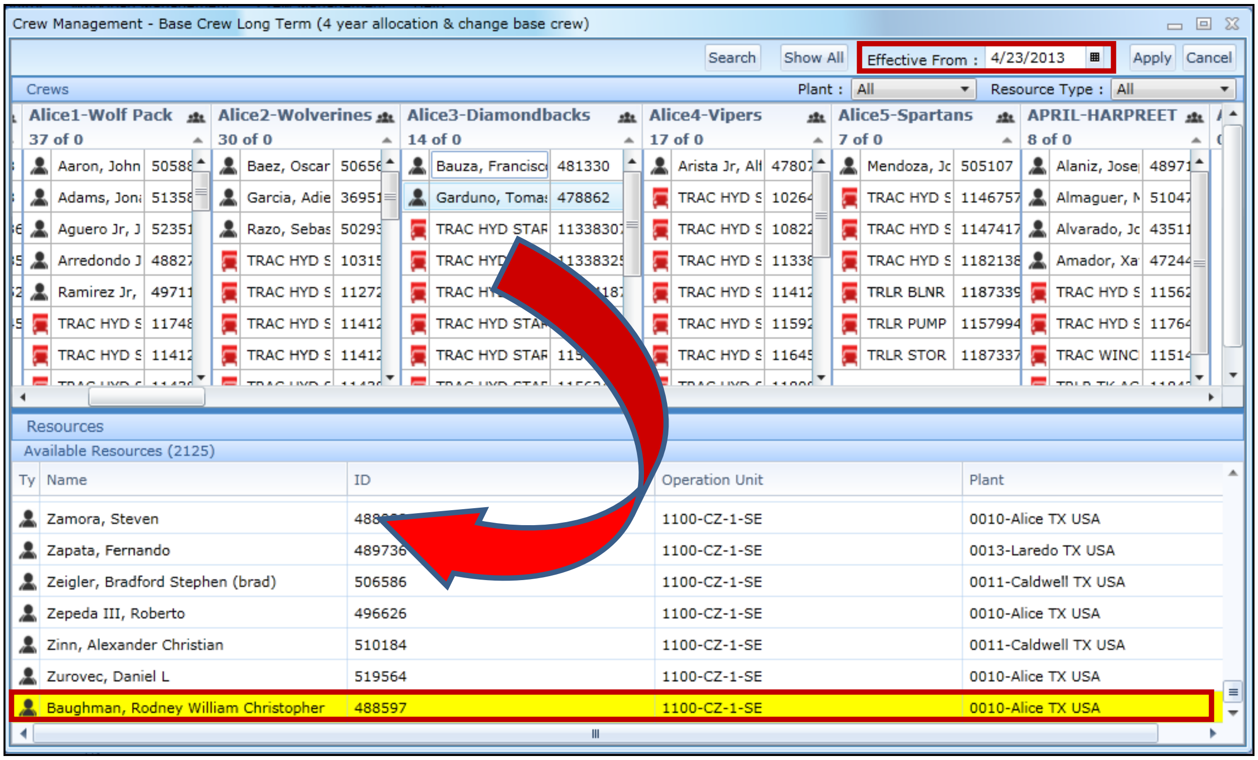
8. Click the **Apply** 

button.

Remove a Resource from the Crew:

1. To remove a resource from the Crew and make **available,** validate the availability date displays in the **Effective From** field.

2. Select the resource from the **Crew** panel.



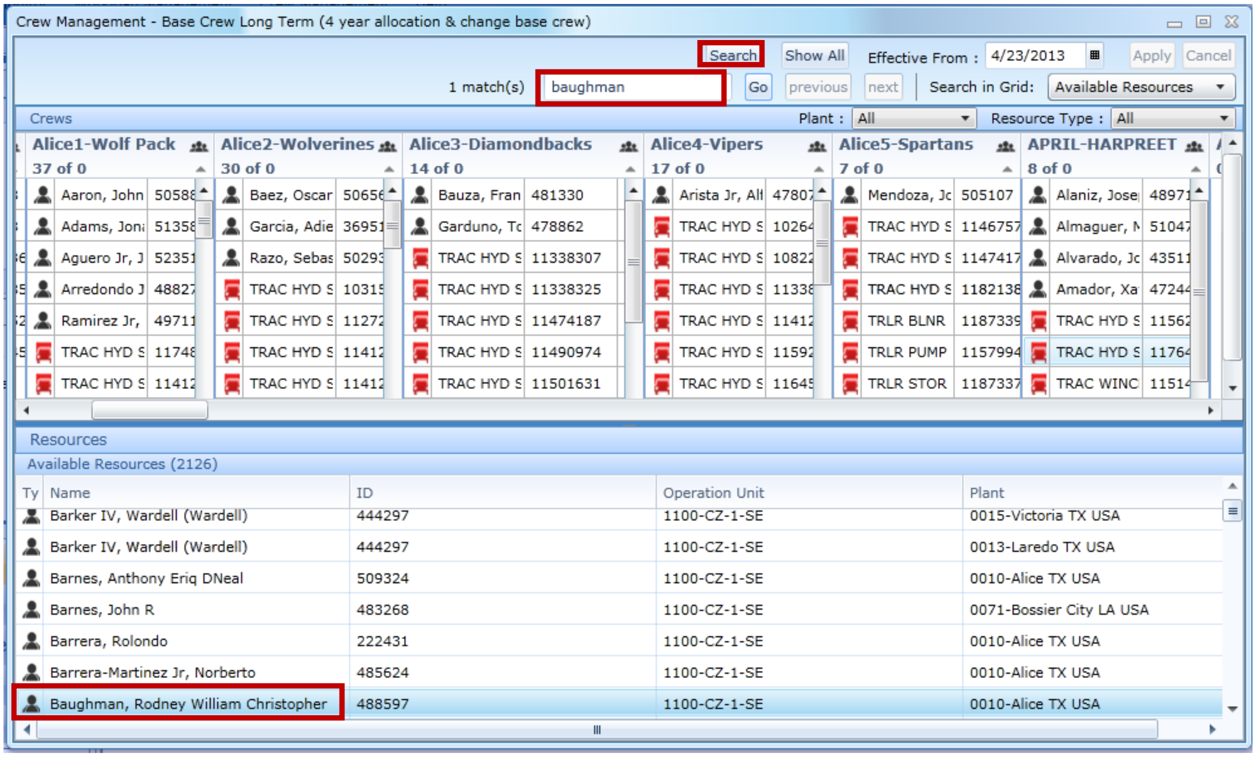
3. Use the drag and drop feature to move the resource to the **Available Resources** section.

4. Click the **Apply**  button.

   Note: The resource is no longer allocated to a crew and is no longer assigned a based crew. The system automatically removes the four year allocation from the effective date.

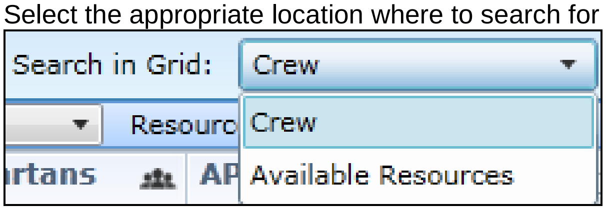
Additional Features

Searching in the *Base Crew Long Term* window:



To search for resources:

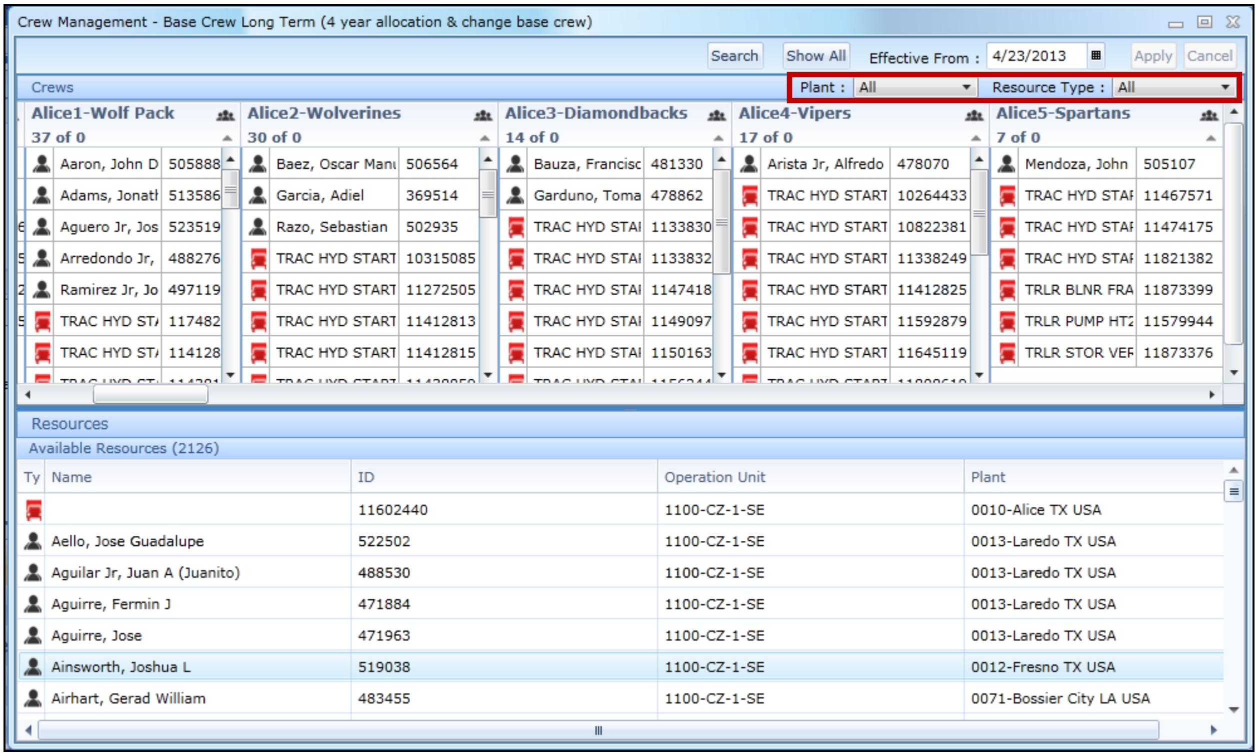
1. Click the **Search** button.
2. Enter the text in the blank field.
3. Click the drop-down in the **Search in Grid** field.
4. Select the appropriate location where to search for the resource.



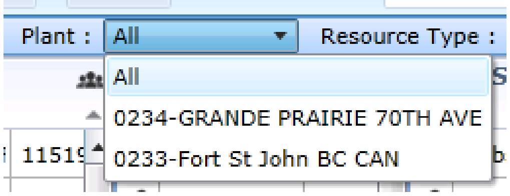
5. Click the **Go** button.

Note: The Resource will be highlighted if found. Check for results next to search box to see if resource was found.

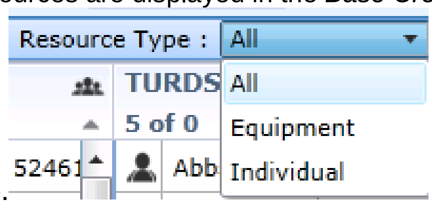
Filtering in the *Base Crew Long Term* window:



If multiple plants are loaded in the Scheduling View, you can filter by plant.



If multiple resources are displayed in the *Base Crew Long Term* window, you can filter by

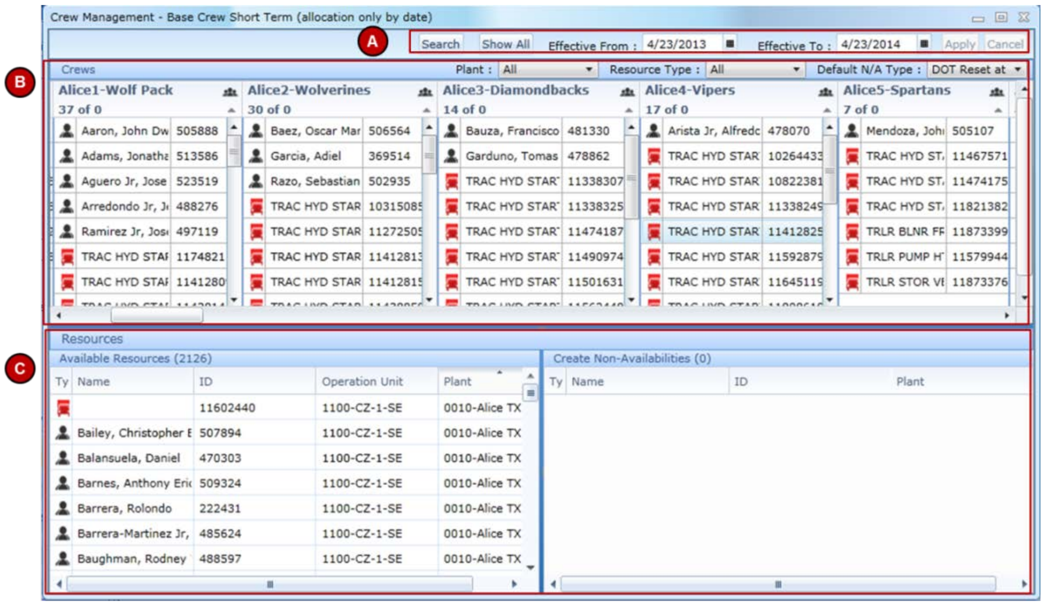


resource type.

Base Crew Short Term – Production Enhancements

Base Crew Short Term is a feature that allows users to view the base crew of resources and create allocations. This functionality will allow for the Scheduler to update the resources non-availability and allocation for the time period selected for four years, but will not change the base crew properties.

The *Crew Management – Base Crew Short Term window* is separated into three panels: **Menu Bar**, **Crews** and **Resources**.



D. **Menu Bar:** Displays functional buttons and effective date.

E. **Crews Panel**: Displays all resources for the base crew assigned.

   Note: The **Crews Panel** does not display information about where the resources are currently allocated.

F. **Resources Panel**: Displays the resources with no base crew identified.

   Note: The **Resources Panel** is only used to create non-availabilities within the effective to and from date.

Note: The *Crew Management – Base Crew Short Term* window is based on the loaded data and filters applied in the Scheduling View.

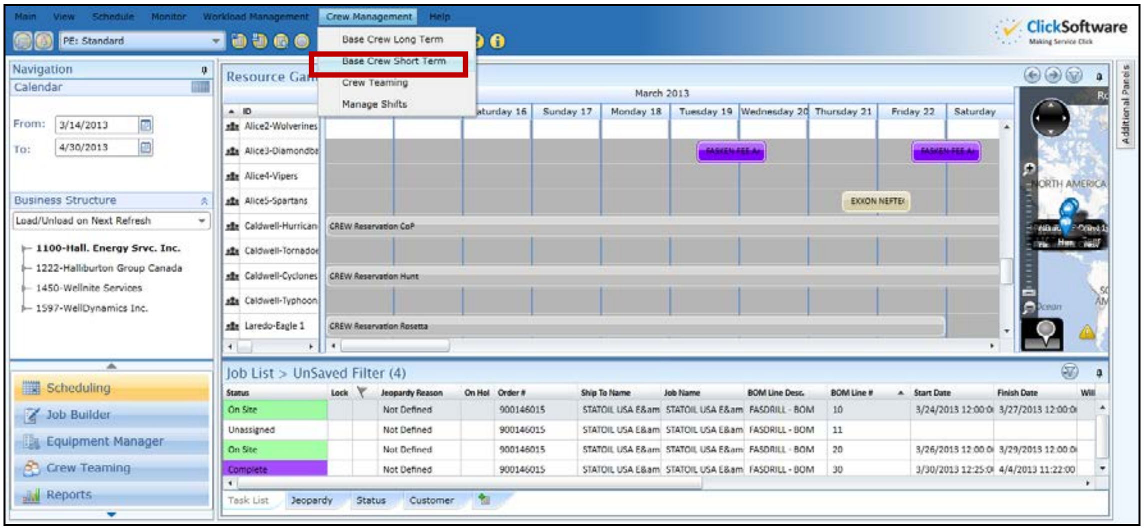
The **Show All** button in the *Crew Management – Base Crew Short Term* window clears all filters and displays all resources.

Use the following steps to maintain the base crew Short term allocation:

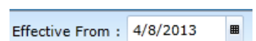
1. Load the required data in ClickSchedule.

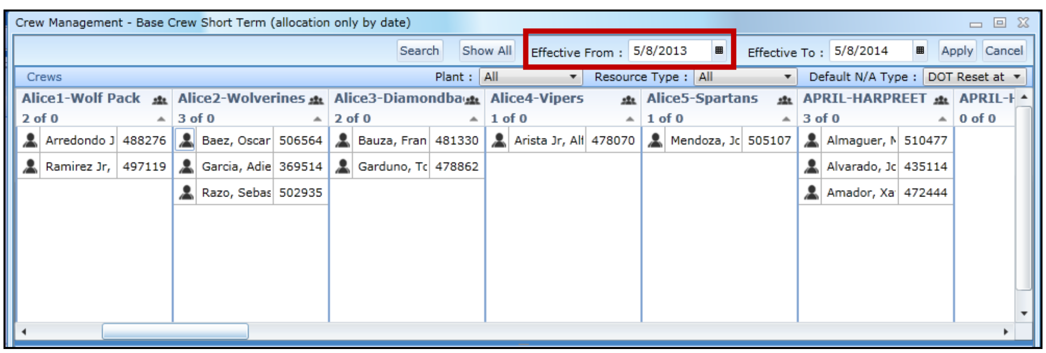
Note: Review the **Loading Data QRC** for additional information.

2. From the menu bar, click **Crew Management** and select **Base Crew Short Term** from the list of options.

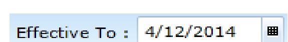


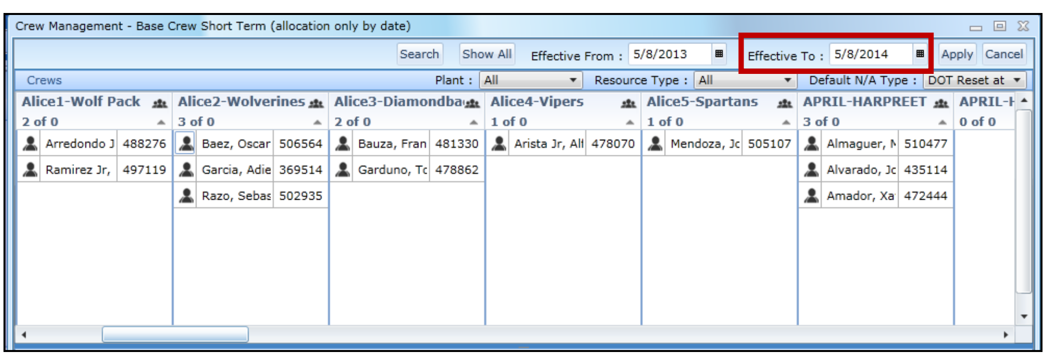
Note: Before dragging and dropping a resource to the different panels, you need to first select the appropriate **Effective From** and **Effective To** dates for the time when you want to move the resource.

3. Click in the **Effective From** field to update the start date, .

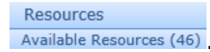


Note: The **Effective From** field defaults to today's date.

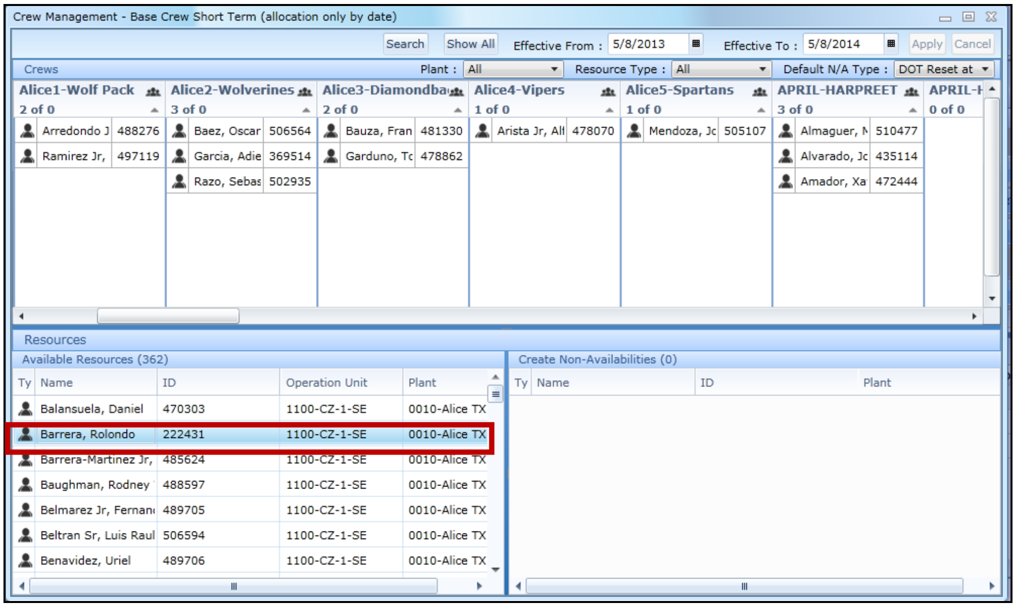
4. Click in the **Effective To** field to update the end date, .



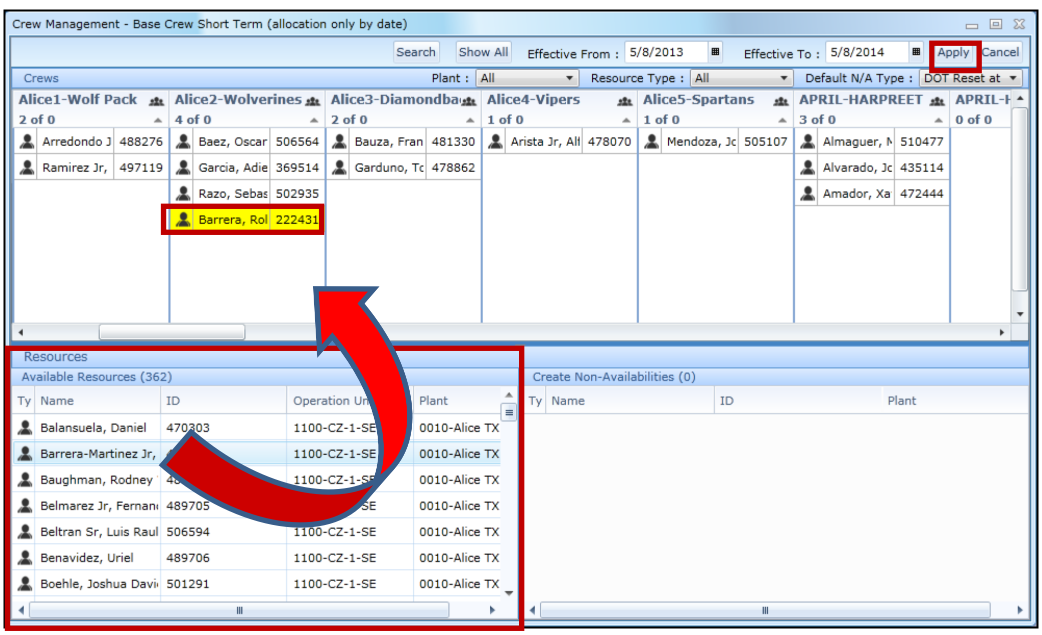
Note: The **Effective To** field defaults to one year from today's date.

5. Select the resource in the **Available Resources** section, 

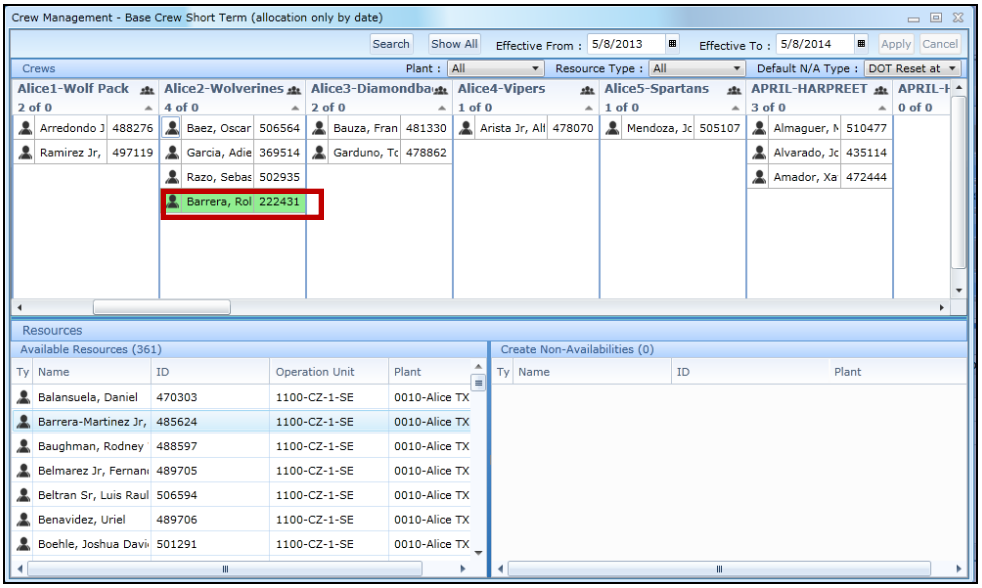
. The resource is highlighted in blue.



6. Use the drag and drop feature to add the resource to the appropriate crew. The resource is highlighted in yellow until changes are applied.



7. Click the **Apply**  button. The resource is highlighted in green after the changes has been applied.

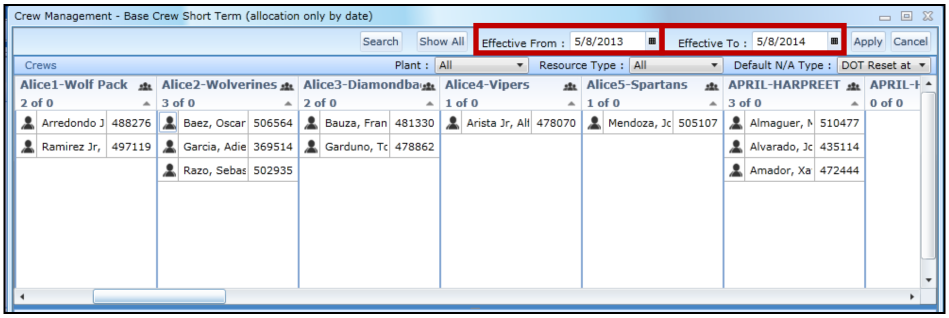


Note: Resources can be dragged and dropped from the Crew panel to another crew, the **Available Resources** section, and the **Create Non-Availabilities** section as well.

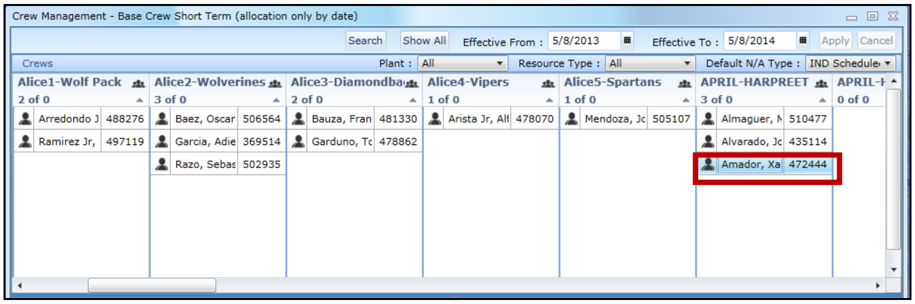
Drag the resource from the other sections to the appropriate section and ensure that the **Effective From** and **Effective To** dates are set prior to moving the resource(s).

Change a Resource Allocation to Available:

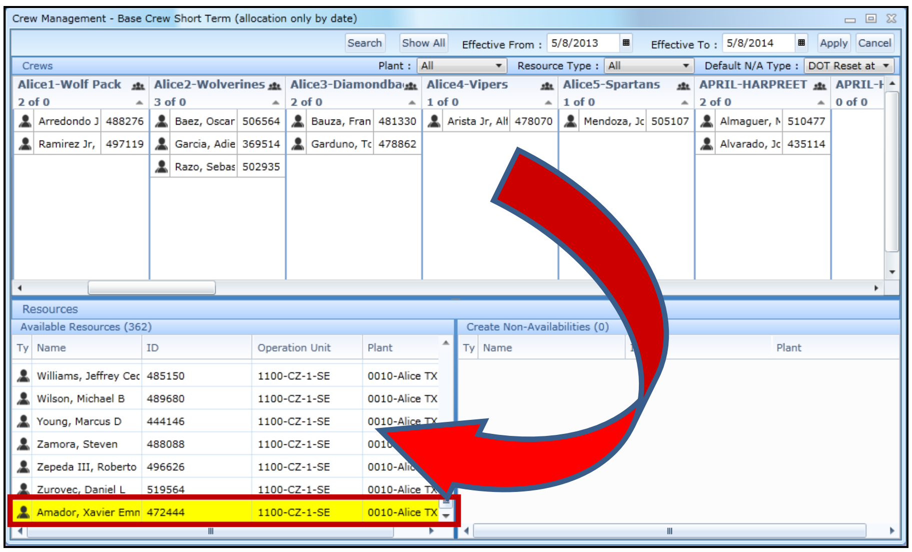
1. To make a resource available for a new allocation, validate the availability date displays in the **Effective From** and **Effective To** fields.



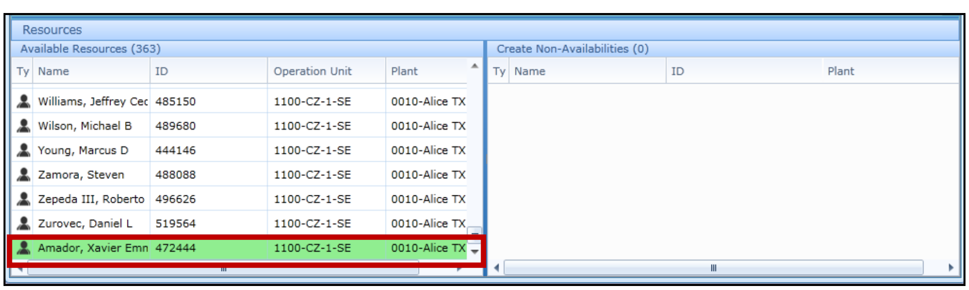
2. Select the resource from the **Crew** panel. The resource is highlighted in blue.



3. Use the drag and drop feature to move the resource to the **Available Resources** section. The resource is highlighted in yellow until changes are applied.

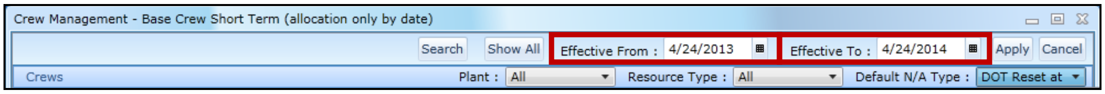


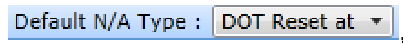
4. Click the **Apply** Apply button. The resource is now available to be allocated to a Crew and is highlighted in green.

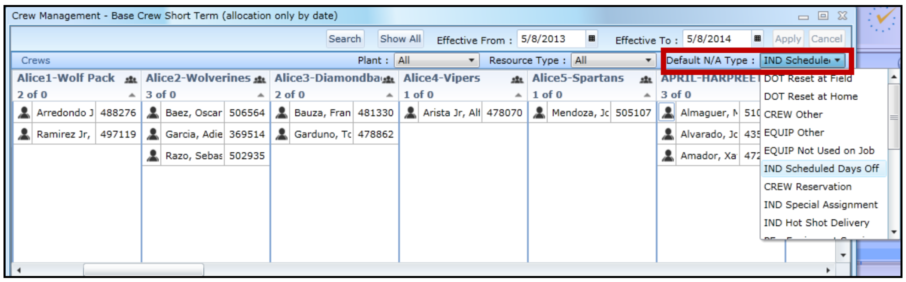


Change a Resource Allocation to Not Available:

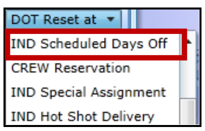
1. To set a resource as **not available,** validate the non-availability date displays in the **Effective From** and **Effective To** fields.



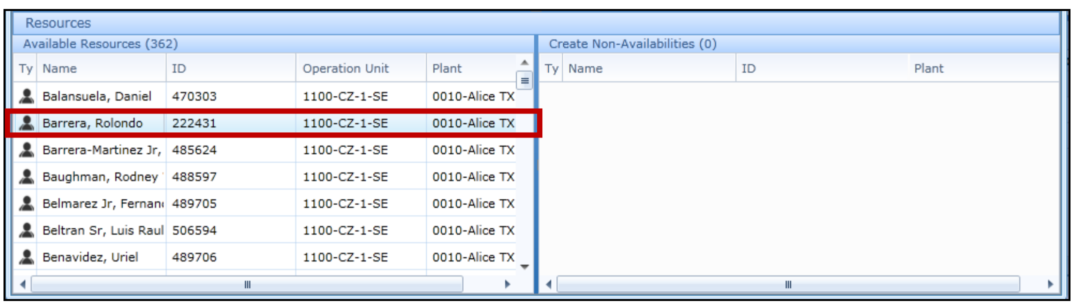
2. Click the drop-down arrow in the **Default N/A Type** field, , to select the appropriate reason code for the resource.



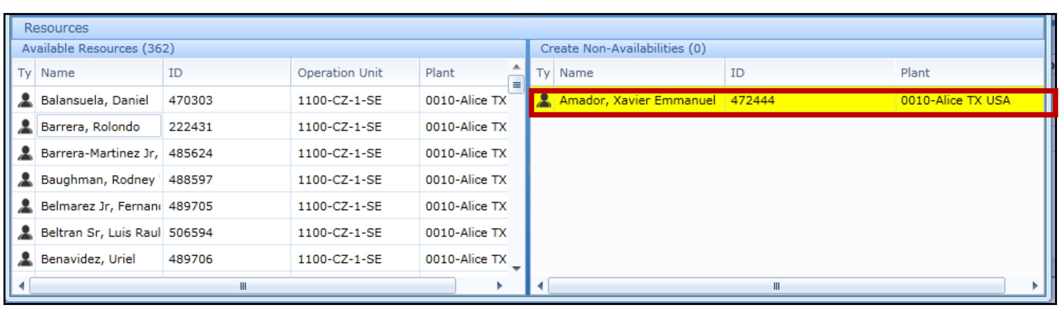
3. Select the appropriate reason code from the list of options.



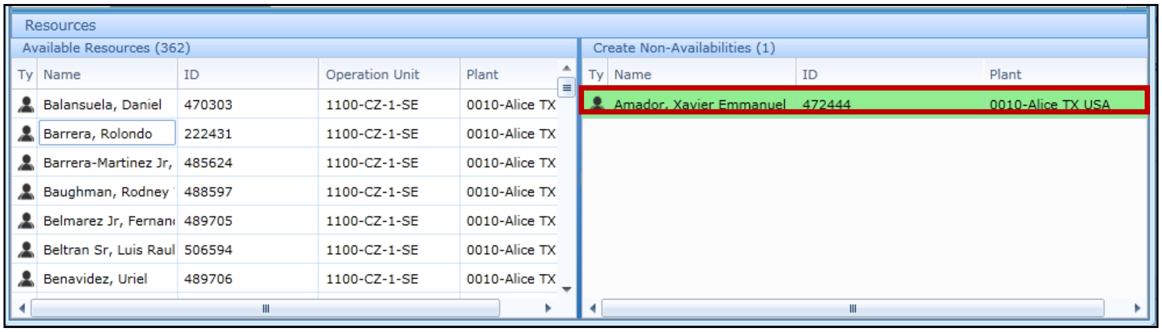
4. Select the resource. Resources can be selected from either the **Crew Panel** or the **Available Resources Panel**.



5. Use the drag and drop feature to move the resource to the **Create Non-Availabilities** section.



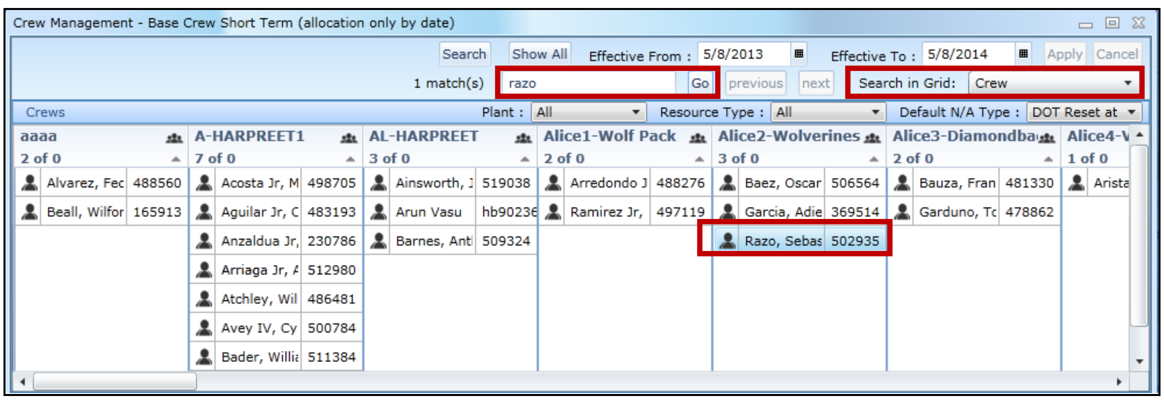
6. Click the **Apply**  button.



Note: The resource is now unavailable for the time specified and the reason specified. The resources are highlighted green in the **Create Non-Availabilities** section.

Additional Features

Searching in the *Base Crew Short Term* window:



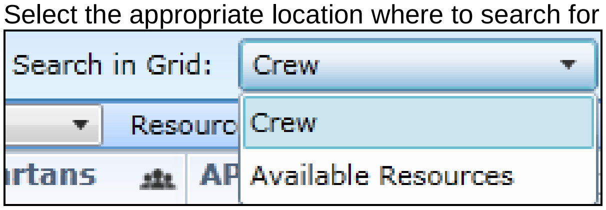
To search for resources:

1. Click the **Search** button.

2. Enter the text in the blank field.

3. Click the drop-down in the **Search in Grid** field.

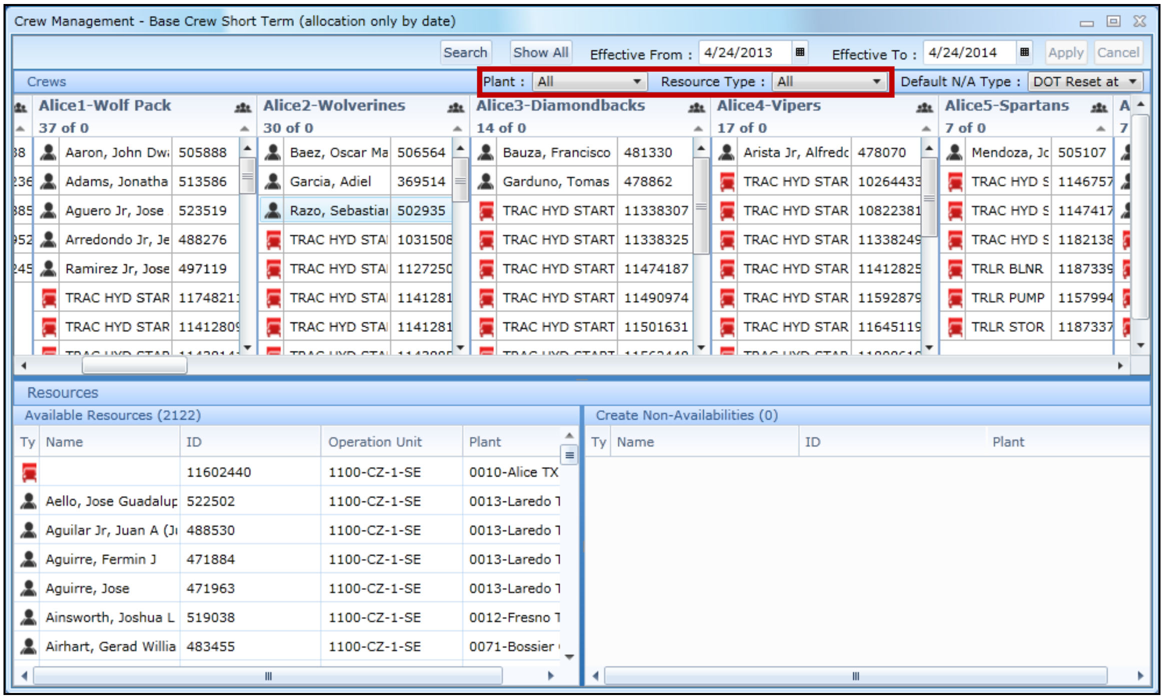
4. Select the appropriate location where to search for the resource.



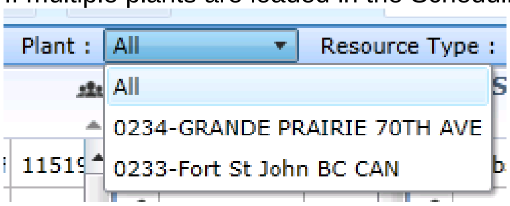
5. Click the **Go** button.

Note: The Resource will be highlighted if found. Check for results next to search box to see if resource was found.

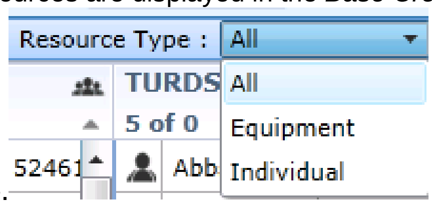
Filtering in the *Base Crew Short Term* window:



If multiple plants are loaded in the Scheduling View, you can filter by plant.



If multiple resources are displayed in the *Base Crew Short Term* window, you can filter by resource type.



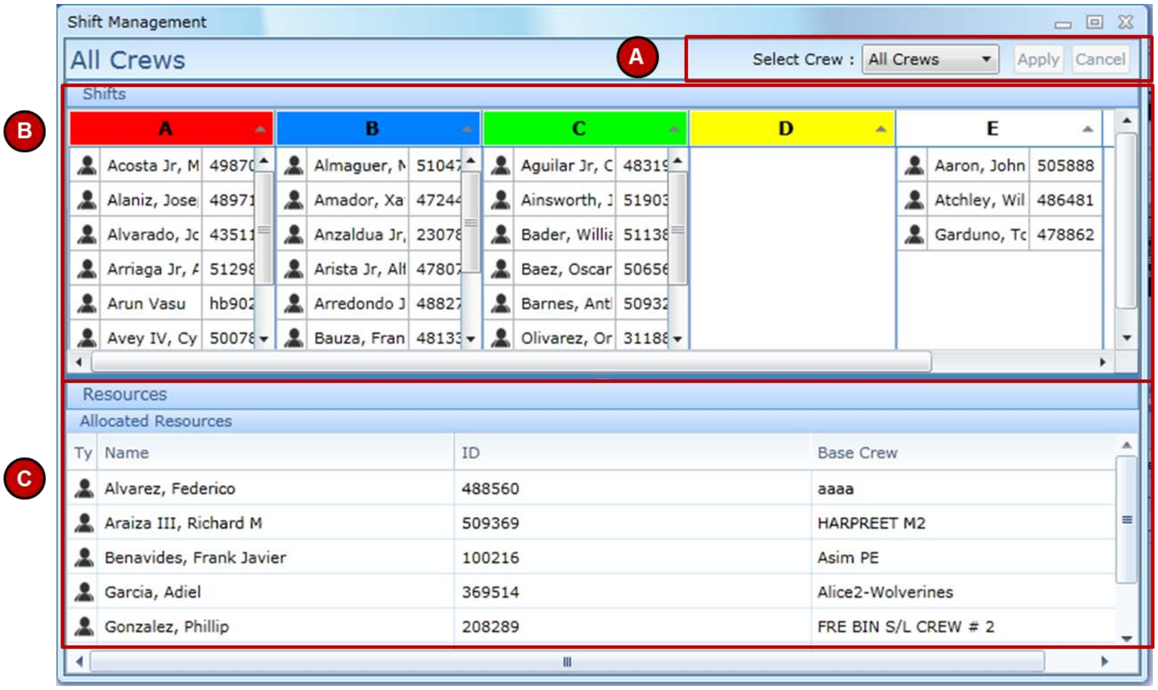
Manage Shifts – Production Enhancements

Manage Shift is a feature utilized in ClickSchedule to maintain crews shift assignments.

Schedulers will be able to:

- View and modify the Resources shift assignments for a specific crew
- Manipulate the column grids and sort the resources by alpha numeric

The *Shift Management* window is separated into three panels: **Menu Bar**, **Shifts** and **Resources**.



G. **Menu Bar:** Displays functional buttons.

H. **Shifts Panel**: Displays all resources assigned to a crew for the specific shift pattern.

I. **Resources Panel**: Displays all available resources not allocated to a specific shift pattern.

Note: Only displays Individuals with a Base Crew assigned.

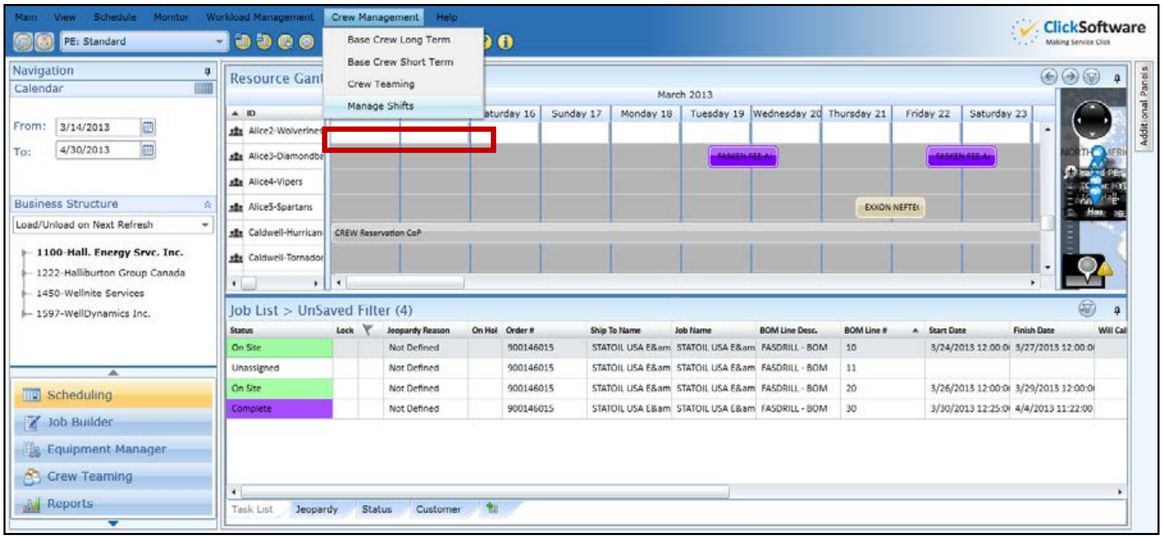
Note: The *Shift Management – All Crews* window is based on the loaded filters in the Scheduling View.

Use the following steps to maintain all crews shift.

1. Load the required data in ClickSchedule.

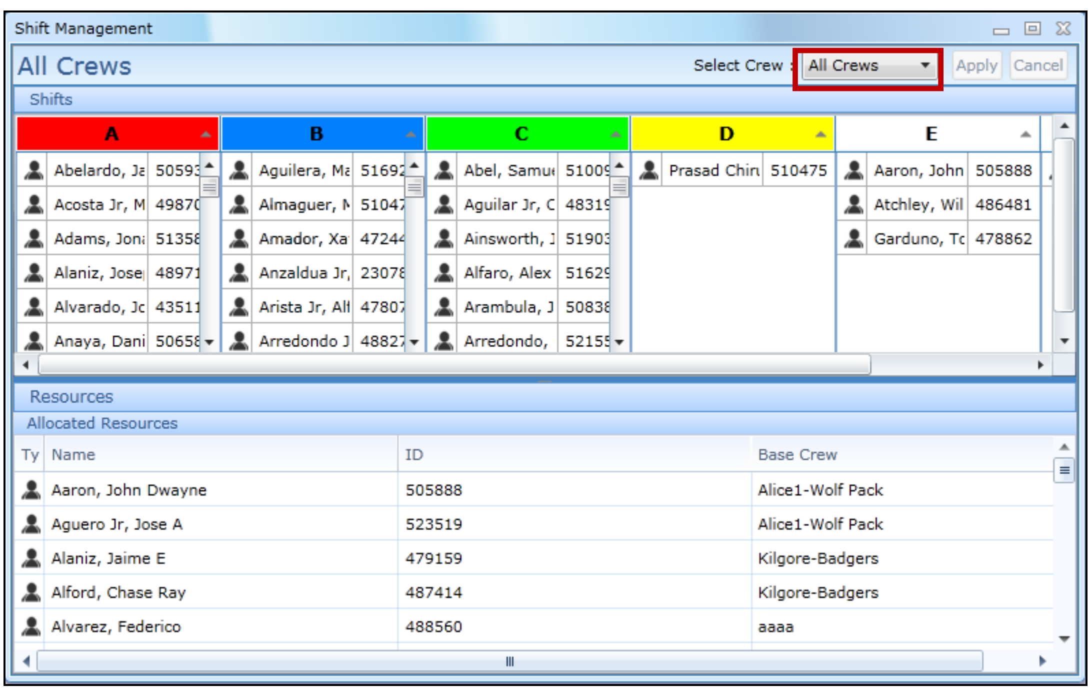
Note: Review the **Loading Data QRC** for additional information.

2. From the menu bar, click **Crew Management** and select **Manage Shifts** from the list of options.

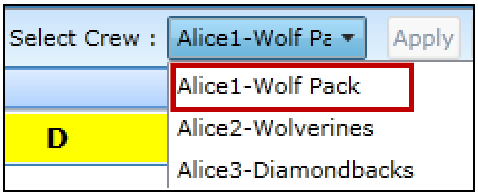


3. Click the drop-down arrow in the **Select Crew** field, 

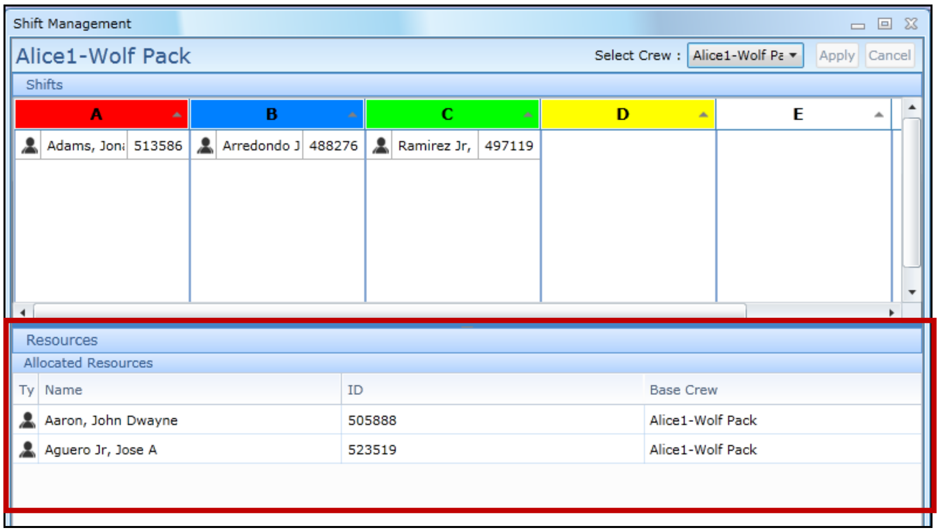
.



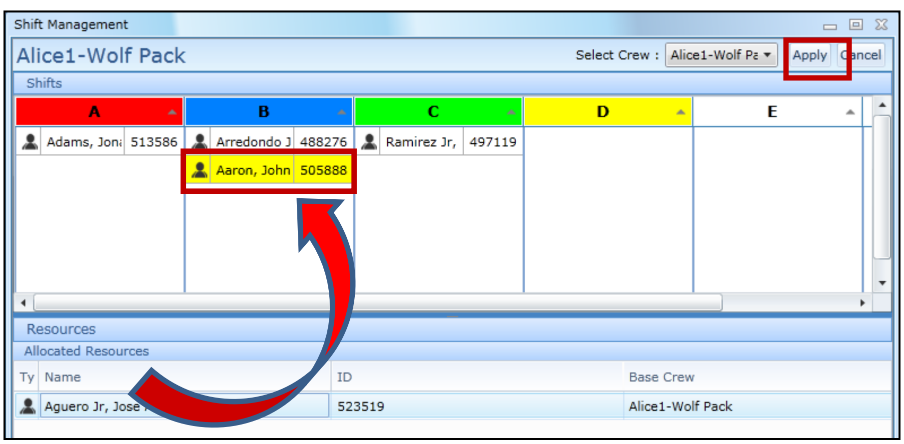
4. Select the desired crew from the list of crew names.



5. Select the resource in the **Allocated Resources** panel, 
.



6. Use the drag and drop feature to add the resource to the appropriate shift. The resource is highlighted in yellow until changes are applied.



Note: Resources can be dragged and dropped from **Shifts** to the **Allocated Resources** section as well.

7. Click the **Apply** 
 button.

Note: The resource is now assigned to the selected shift.

Performing a Search

You can search standard PSL job and resource entities within ClickSchedule at any time while in the **Scheduling** or **Crew Teaming** views.

The most common items to search by include **Resource Name, Title**/**Type** or **ID**, and jobs by **Sales Order Number** and **Ship to Name**.

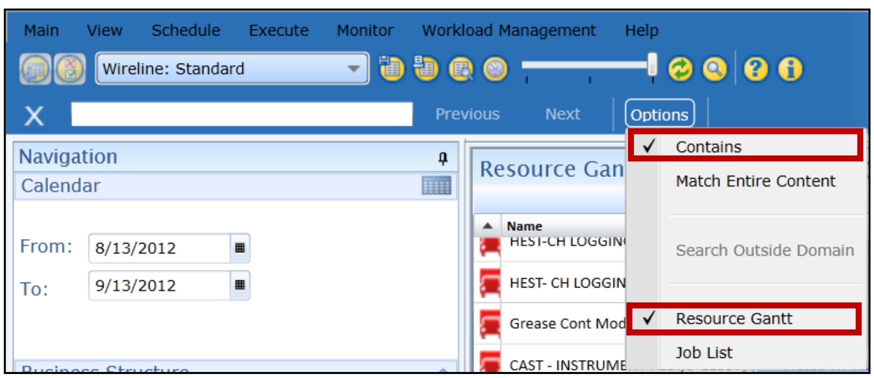
> **Note**: The search engine is **case** sensitive. If you are not sure of the case, compare your search string with that of the entries in **Resource** or **Job** columns. In all cases, first and last names begin with a capital letter.

By default, the search comparison method is **Contains**, which means the search results will contain the alpha/numeric characters of the search string. For example, if the search expression is '**John'**, the records that are returned would also include **Johnny**, **Johnson**, **John Smith**.

The search engine can also compare for exact matches (**Match Entire Content**), where the result is equal to the search expression. For instance, if the string is '**EXXON**', it will not return records where the field is equal to '**EXXONMOBIL**'.

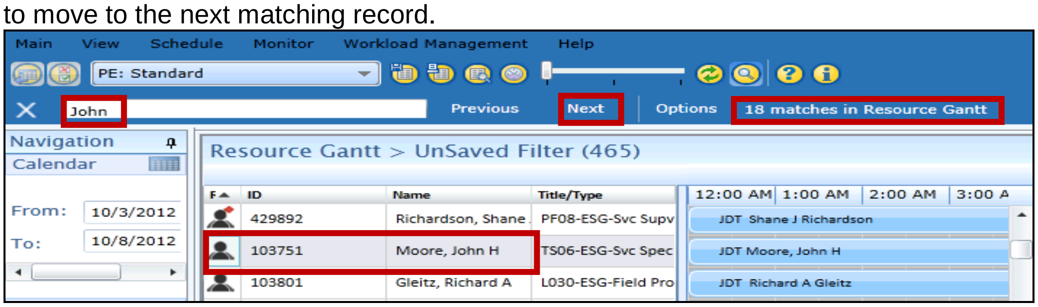
To perform a search:

1. Click the **Search** icon  on the toolbar. A **Search** area appears below the **Menu** bar.
2. Click **Options** and specify the search options.

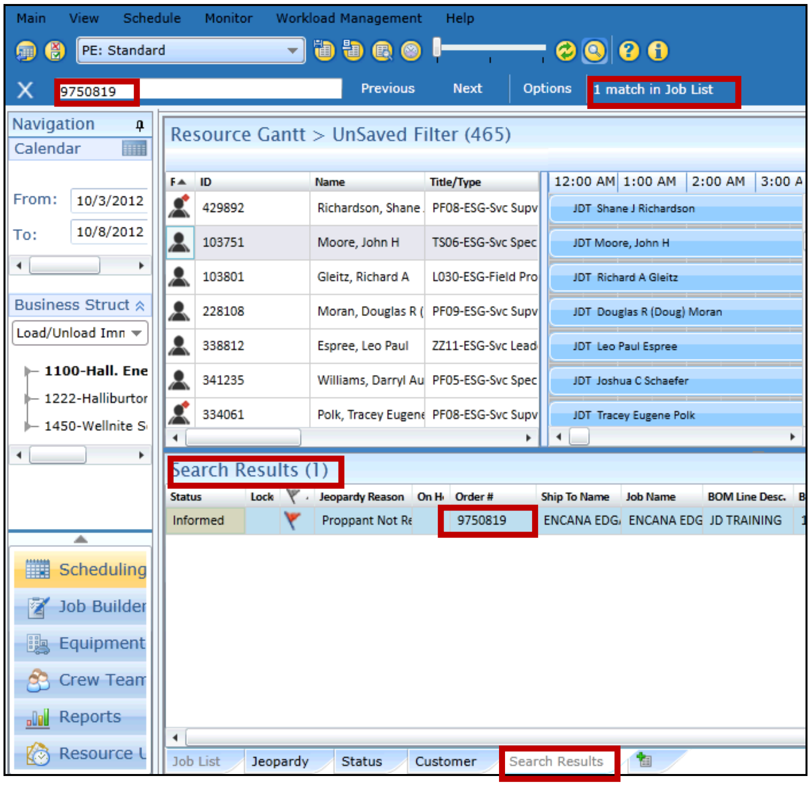


   - Set the entity to be searched by selecting **Job List** or **Resource Gantt**.
   - Select **Contains** to locate all records that contain the search expression. Alternatively, select **Match Entire Content** to locate only those records that precisely match the entire phrase/word.

3. Enter a name or partial string of a resource type in the **Search** field and press **ENTER**. The number of matching records is listed in the **Resource Gantt**. The first of the matching **Resource** records is selected as shown below. Click **Next** in the **Search** area to move to the next matching record.

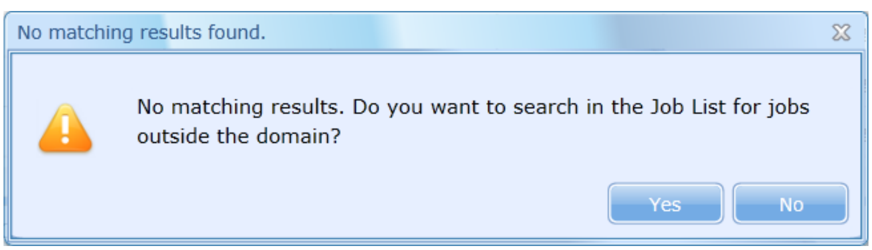


In the event that you are searching for a specific job, the result set is returned to the **Search Results** page, indicated by the tab located at the bottom of the **Job List** table as show below:



Note: To cancel the search, and view the entire list of jobs, click the **Job List** tab.

If the record for which you are searching is not within the loaded data domain, the following alert is displayed:



In this case, if you would still like to view the record, click 

. The entire database will be searched and the matching records will be returned.

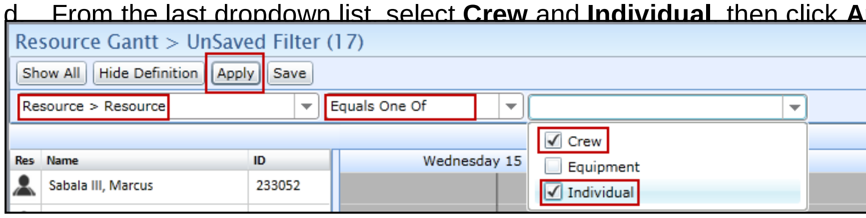
Reassigning a Crew Member to a New Shift

The Mobile Lead User (MLU) is responsible for notifying the Scheduler whenever a crew member's shift needs to be changed and the Shift Leader is unable to change the shift in Job Details. The Scheduler then reassigns a resource to a different shift.

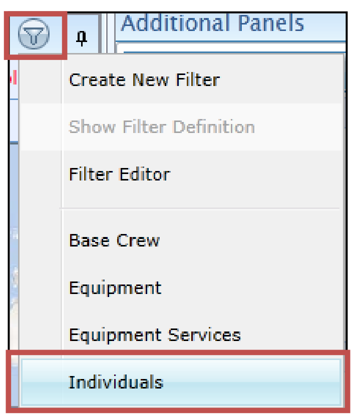
Reassigning a crew member should be used for long-term/permanent assignments.

To reassign a crew member to a new shift:

1. Create a filter to view individual crew members on the Gantt as follows:
    a. In the **Scheduling** view, click the  button on the Resource Gantt
    b. From the first dropdown list, select the **Resource > Resource** parameter.
    c. From the middle dropdown list, select the **Equals One Of** operator.
    d. From the last dropdown list, select **Crew** and **Individual**, then click **Apply**.



Note: Instead, you may use the pre-defined **Individuals** filter (shown below) to load the individual resources into the Gantt.

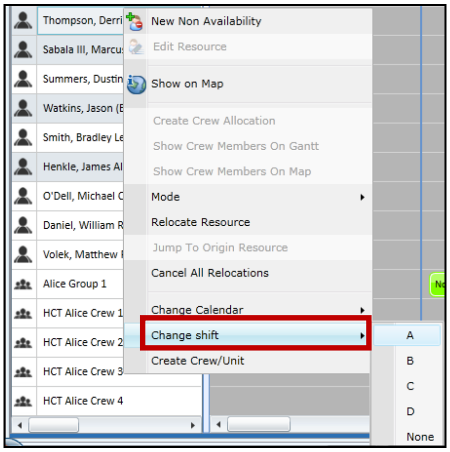


2. Right-click the required crew member's name in the list of resources on the **Resource Gantt** chart

Note: You may assign a shift to multiple resources, if the shift change is the same for each. Select the first resource, press and hold down the **CTRL** key, then select additional resources as necessary.

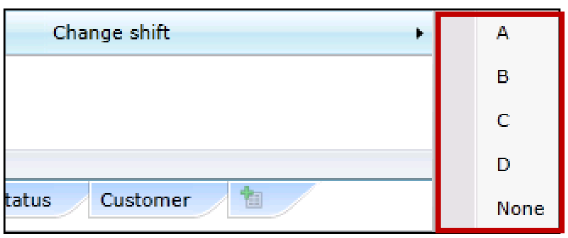
A menu of options is displayed.

3. Select the **Change Shift** option.



A list of available shifts is displayed.

4. Select the new shift.



The selected crew members are now assigned to the selected shift.

Relocating and Canceling a Resource from a Location

Effective assigning and managing of resources is essential. Resource demand, or lack thereof, can cause resources to become unbalanced.

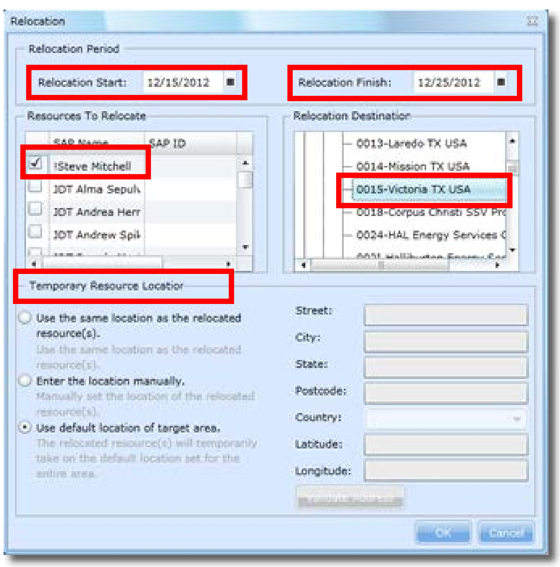
ClickSchedule allows the ability to relocate and/or individual resources between plants within a region and/or to another region plant (if needed) to accommodate adjustments in demand for jobs that require supplementary equipment or individual resources.

Note: If a crew is relocated, all of the resources allocated to the crew for the designated time period are relocated.

To relocate a Resource or Crew:

Note: Relocations may not exceed thirty (30) days.

1. In the **Resource Gantt Chart**, select the resource(s) that you want to relocate and then right-click and select **Relocation** from the menu.
2. The **Relocation** panel is displayed indicating the resources to be relocated.



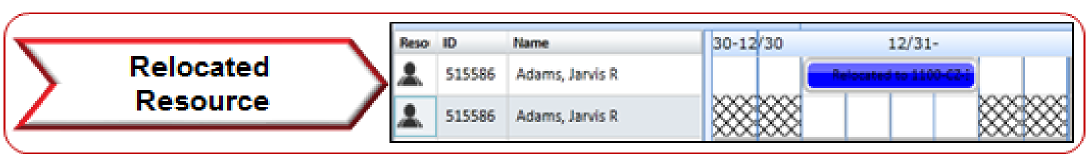
3. **Relocation Start** field: Use this field to manually enter the first date in the time period during which the resource is to be relocated. Or, click and select the date from the calendar control
4. **Relocation Finish** field: Use this field to manually enter the last date in the time period during which the resource is to be relocated. Or, click and select the date from the calendar control
5. **Resources to Relocate** pane: Verify that the resource(s) to be relocated are selected.
6. **Relocation Destination** pane: Select the Company Code, Operational Unit and Plant to which the resources are to be temporarily relocated.

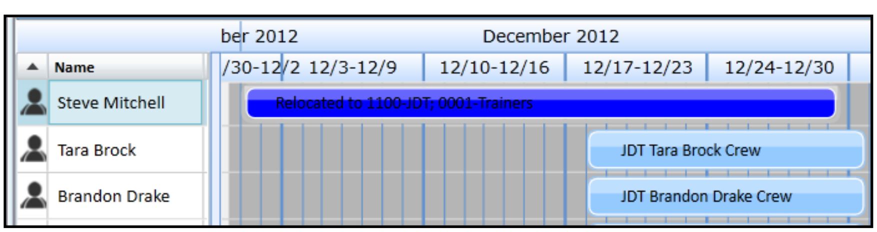
7. **Temporary Resource Location :**

   - **Use the same location as the relocated resource(s) -** Continues to use the home plant or default address of the resource(s) as the base location during the relocation
   - **Enter the relocation address manually -** Enter the address details in the adjacent fields. After entering the address details, click **Validate Address** to check that the address is valid.
   - **Use the default location of the target area -** Uses the default address of the target plant as the base location during the relocation period

8. Click  **OK**. The relocation is set for the specified period.

A **Relocated Resource** is recognized on the **Gantt**, in the target relocation plant, by the '*fence-style*' shading surrounding the relocated resource. In the resource's home plant, a relocation is indicated on the **Gantt** by the **Relocation Gantt** bar as shown below.



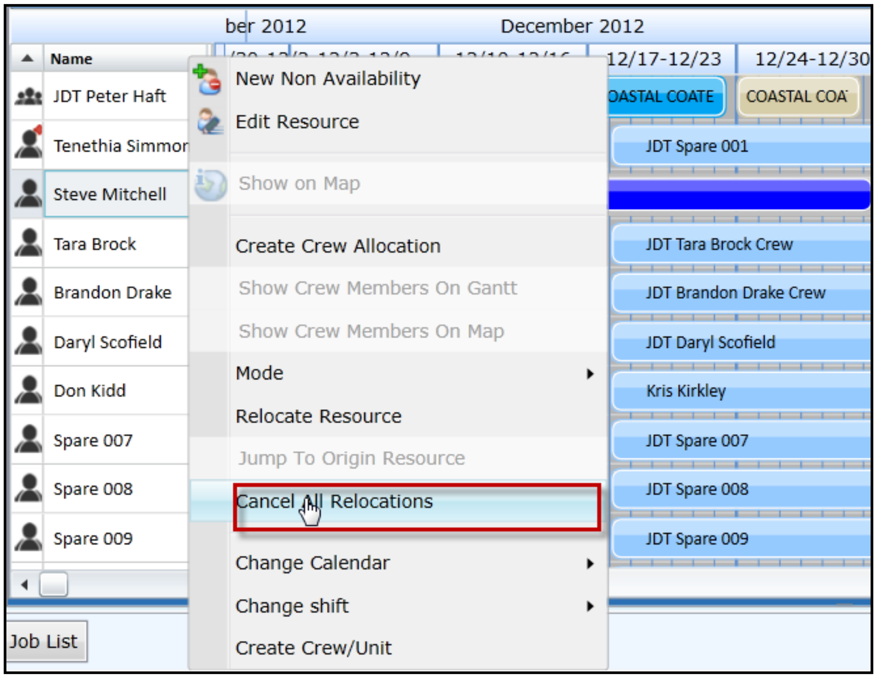


Cancel Resource Relocations

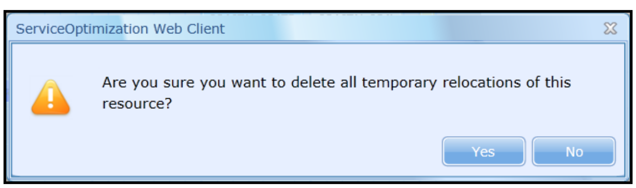
When Relocation assignments are over, cancel all scheduled relocations for the selected resource.

To Cancel Relocations:

1. Right-click on the **Resource List Name** and select **Cancel All Relocations**.



2. A confirmation message is displayed.



3. Click  **Yes** to delete all temporary relocations of the selected resource; otherwise, click **No** to roll back the relocation cancellation.

Tip: To view only the resources for which relocations have been defined, right-click on the **Resource List** and select **Relocations Mode**.

Resolving Resource Utilization Errors – ClickSchedule

Use this QRC to resolve Resource Utilization Errors and reconcile exposure hour records for jobs.

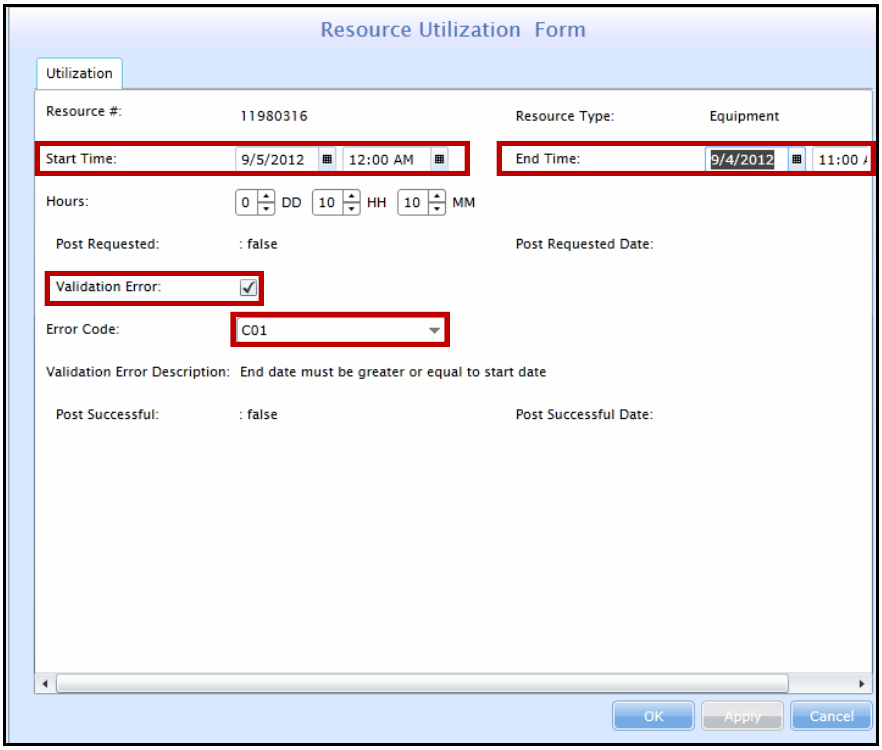
Error codes that start with a "**C"** indicate that the error occurred in ClickSchedule.
Error codes that start with an "**E**" indicate that the error occurred in SAP when attempting to update the scheduling board in transcation code, ZJLSN – Job Reporting System.

The following are some of the common errors that might occur in the **Resource Utilization** view and step instructions on how to reconcile and clear the errors:

- C01: End Date must be greater or equal to start date
- C02: Exposure hours greater than schedule duration
- C03: Conflict exists for this equipment
- C04: Conflict exists for this personnel
- E02: Job is currently being edited
- E43: Conflicts exist for this equipment
- E44: Conflicts exist for this personnel
- E69: SAP Master Data, Controlling Data failures

Error Code	Description
C01	End date must be greater or equal to start date

This error occurs when the end date for a resource is earlier than the start date.



To resolve a **single** entry error record:

1. Double click the record which displays **True** in column **Error?** for error code **C01**.
2. In **the Resource Utilization** form, adjust **Start Time** and/or **End Time** so the end date is after the start date.
3. Adjust the **Hours,** accordingly, based on the new start/end time.
4. Uncheck the **Validation Error** checkbox.
5. Remove the **Error Code** in the **Error Code** field using the drop down menu and selecting **Not Defined.**
6. Click .

To resolve **multiple** entry error records with the same error code**, C01**:

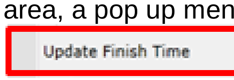
1. Click the first line item with the error code.

Note: The line item is highlighted.

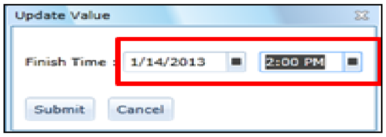
2. Hold down the **Shift** key on the keyboard.
3. Click the last line item with the same error code, **C01**.
4. Release the **Shift** key.

Note: All line item records are selected.

Order #	Resource #	Resource Type	Start Time	Finish Time	Hours	Error?	Error Code
0900131649-10	506191	Individual	1/9/2013 7:00:00 PM	1/10/2013 11:00:00 PM	28:00	False	Not Defined
0900131649-10	10385959	Equipment	3/14/2013 1:06:18 PM	3/12/2013 1:04:49 PM	8:00	True	C01
0900131649-10	10252034	Equipment	3/14/2013 1:06:18 PM	3/12/2013 1:04:49 PM	8:00	True	C01
0900131649-10	11670929	Equipment	3/14/2013 1:06:18 PM	3/12/2013 1:04:49 PM	24:00	True	C01
0900131649-10	500815	Individual	3/14/2013 1:06:18 PM	3/12/2013 1:04:49 PM	24:00	True	C01
0900131649-10	11810384	Equipment	3/14/2013 1:06:18 PM	3/12/2013 1:04:49 PM	24:00	True	C01
0900131649-10	104839	Individual	3/14/2013 1:06:18 PM	3/12/2013 1:04:49 PM	24:00	True	C01

5. Right click anywhere in the highlighted area, a pop up menu displays.
6. Select the **Update Finish Time** option  from the menu selection.

Note: The *Update Value* window displays.

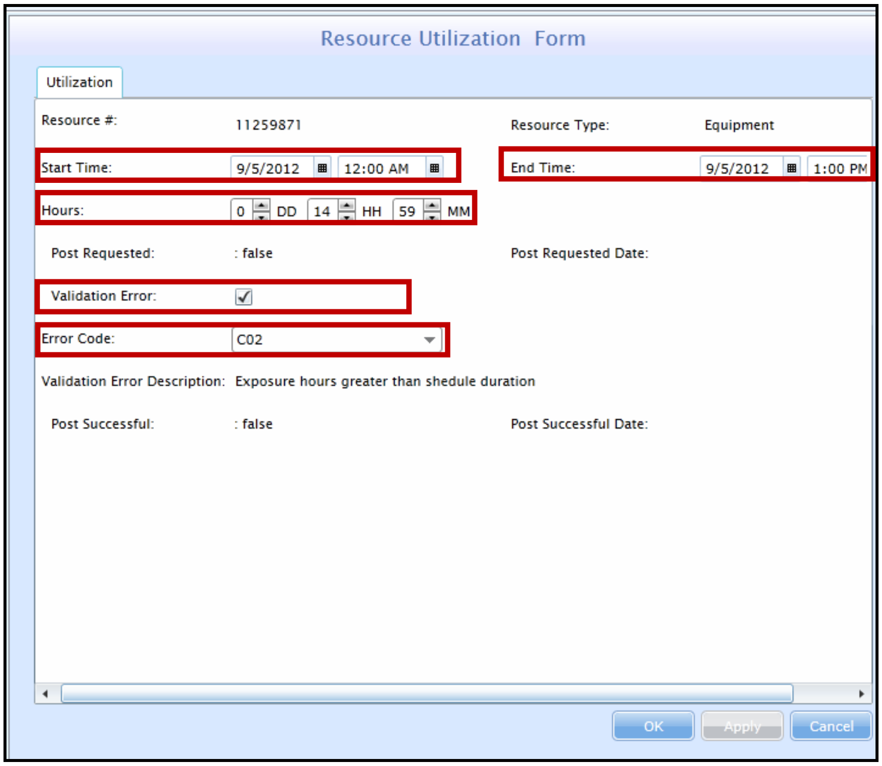


7. Enter the correct finish date and time for the job.
8. Click Submit.

Result: All selected records have been changed and the error should be removed.

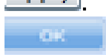
Error Code	Description
C02	Exposure hours greater than schedule duration

This error occurs when the exposure hours are greater than schedule duration.



To resolve a **single** entry error record:

1. Double click the record which displays **True** in column **Error?** for error code **C02**.
2. In the Resource Utilization orm, adjust the **Hours** accordingly based on the start/end time to reflect the correct exposure hours.
3. Uncheck the **Validation Error** checkbox.
4. Remove the **Error Code** in the **Error Code** field using the drop down menu and selecting the **Not Defined** option.
5. Click 

.
6. Click 

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To resolve **multiple** entry error records with the same error code, **C02**:

Order #	Resource #	Resource Type	Start Time	Finish Time	Hours	Error?	Error Code
0900131649-10	506191	Individual	1/9/2013 7:00:00 PM	1/10/2013 11:00:00 PM	28:00	False	Not Defined
0900131649-10	10385959	Equipment	3/25/2013 12:00:00 AM	3/25/2013 1:00:00 PM	24:00	True	C02
0900131649-10	10252034	Equipment	3/25/2013 12:00:00 AM	3/25/2013 1:00:00 PM	24:00	True	C02
0900131649-10	11670929	Equipment	3/25/2013 12:00:00 AM	3/25/2013 1:00:00 PM	24:00	True	C02
0900131649-10	500815	Individual	3/25/2013 12:00:00 AM	3/25/2013 1:00:00 PM	24:00	True	C02
0900131649-10	11810384	Equipment	3/25/2013 12:00:00 AM	3/25/2013 1:00:00 PM	24:00	True	C02
0900131649-10	104839	Individual	3/25/2013 12:00:00 AM	3/25/2013 1:00:00 PM	24:00	True	C02

1. Click the first line item with the error code, **C02.**

Note: The line item is highlighted.

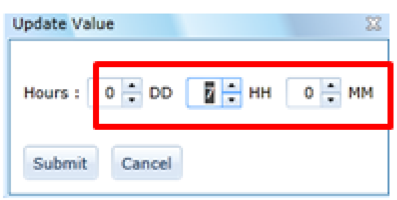
2. Hold down the **Shift key** on the keyboard
3. Click the last line item with the same error code, **C02**
4. Release the **Shift key** on the keyboard.

Note: All line item records are selected.

Order #	Resource #	Resource Type	Start Time	Finish Time	Hours	Error?	Error Code
0900131649-10	506191	Individual	1/9/2013 7:00:00 PM	1/10/2013 11:00:00 PM	28:00	False	Not Defined
0900131649-10	10385959	Equipment	3/25/2013 12:00:00 AM	3/25/2013 1:00:00 PM	24:00	True	C02
0900131649-10	10252034	Equipment	3/25/2013 12:00:00 AM	3/25/2013 1:00:00 PM	24:00	True	C02
0900131649-10	11670929	Equipment	3/25/2013 12:00:00 AM	3/25/2013 1:00:00 PM	24:00	True	C02
0900131649-10	500815	Individual	3/25/2013 12:00:00 AM	3/25/2013 1:00:00 PM	24:00	True	C02
0900131649-10	11810384	Equipment	3/25/2013 12:00:00 AM	3/25/2013 1:00:00 PM	24:00	True	C02
0900131649-10	104839	Individual	3/25/2013 12:00:00 AM	3/25/2013 1:00:00 PM	24:00	True	C02

5. Right click anywhere in the highlighted area, a pop up menu appears.
6. Select the **Update Hours** option, Update Hours ,from the menu selection.

Note: The *Update Value* window displays.



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Note: The Hours: is in a Date (DD), Hour (HH) and Minute (MM) format.

7. Enter the correct hours for the job.
8. Click Submit **.**

Result: All selected records have been changed and error should be removed.

Error Code	Description
C03	Conflicts exist for this equipment
C04	Conflicts exist for this personnel

These error occurs when an equipment or a individual is assigned to more than one job at the same time. Therefore, there can not be an overlap in time.

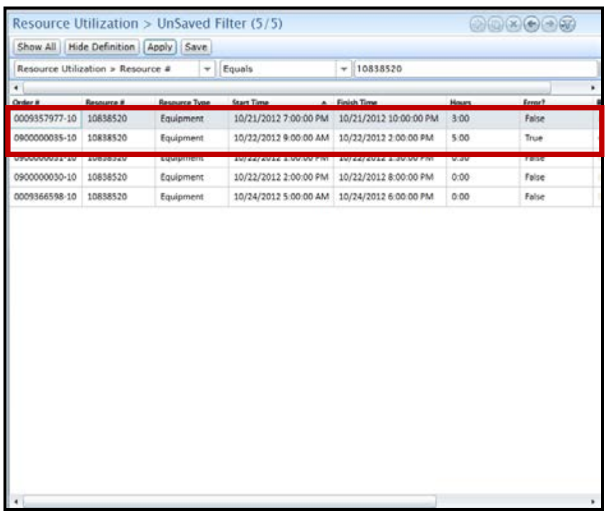
The process to resolve Error Code, **C03** and **C04**, is the same.

Pre-requiste: Received a **C03 or a C04** error code in the Resource Utilization Record for an order. To find the conflict and resolve the error use the following step instruction.

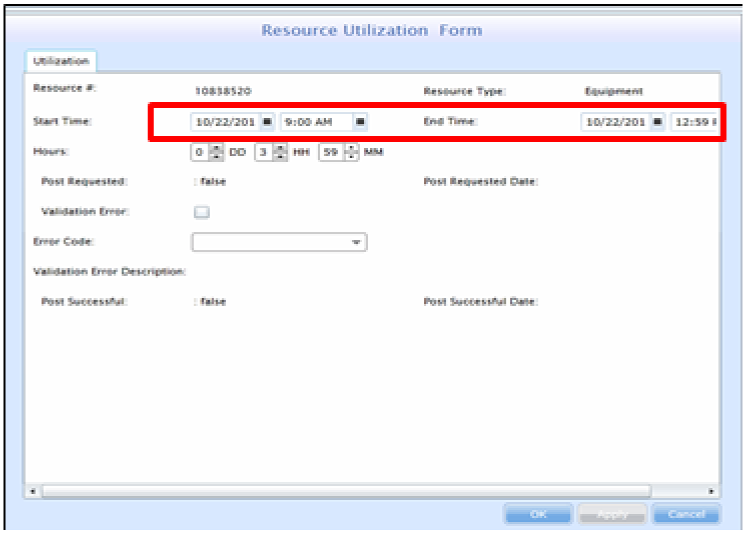
1. Filter by **Resource Utilization > Resource #**
2. Enter the **Resource #** data field.

3. Click  or press enter on the keyboard.

Result: Multiple sales orders for the same piece of equipment on the same date and a time overlap.



4. View the conflict(s) and determine which Resource Utilization Record that needs to be adjusted.
5. Double click the record which displays **True** in column **Error?** for error code, **C03**.
6. In the **Resource Utilization Form**, adjust **Start Time** and/or **End Time** so there is no overlap between the end time of the resource utilization and start time of the same resource utilization.
7. Adjust the **Hours** accordingly based on the new start/end time.



8. Uncheck the **Validation Error** checkbox.
9. The error code field should be blank or select **Not Defined** from the drop down menu options.
10. Click Apply.
11. Click OK.

Working with Duplicated Resource Utilization Records

If there is a duplicate resource utilization record for equipment or an individual, one of the records need to indicate zero, 0, hours.

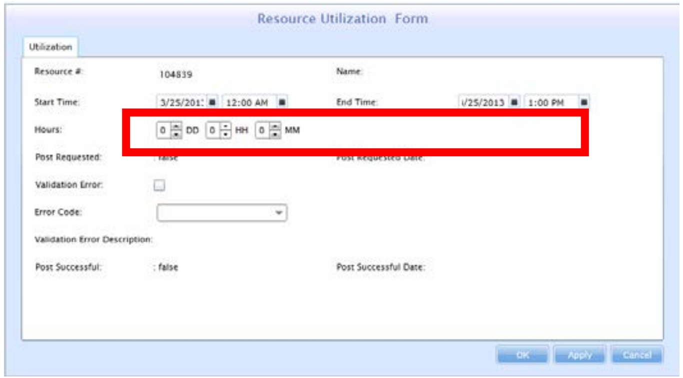
If a resource, equipment or individual, was not **On Site** for the duration of the job, and a Resource Utilization Record exists for the time the resource was **not** there, the Resource Utilization Record for that day needs to indicate, zero, 0, hours.

1. Find the appropriate resource that the Resource Utilization Record hours need to be zero, 0, hours.
2. Double click on the line item to open the Resource Utilization Record.

Order #	Resource #	Resource Type	Start Time	Finish Time	Hours	Error?	Error Code
0900131649-10	10385959	Equipment	3/25/2013 12:00:00 AM	3/25/2013 1:00:00 PM	7:00	False	Not Defined
0900131649-10	10252034	Equipment	3/25/2013 12:00:00 AM	3/25/2013 1:00:00 PM	7:00	False	Not Defined
0900131649-10	11670929	Equipment	3/25/2013 12:00:00 AM	3/25/2013 1:00:00 PM	7:00	False	Not Defined
0900131649-10	500815	Individual	3/25/2013 12:00:00 AM	3/25/2013 1:00:00 PM	7:00	False	Not Defined
0900131649-10	11810384	Equipment	3/25/2013 12:00:00 AM	3/25/2013 1:00:00 PM	7:00	False	Not Defined
0900131649-10	104839	Individual	3/25/2013 12:00:00 AM	3/25/2013 1:00:00 PM	7:00	False	Not Defined
0900131649-10	104839	Individual	3/23/2013 12:00:00 AM	3/23/2013 1:00:00 PM	11:00	False	Not Defined

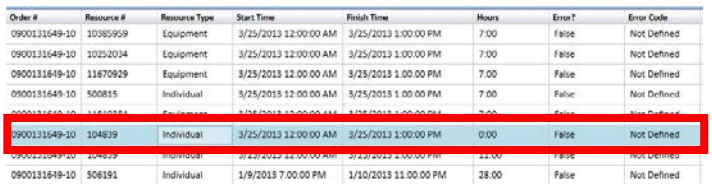
Note: The *Resource Utilization Form* displays.

3. Change the hours to zero, 0 hours.



4. Click Apply.
5. Click OK.

Result: **Resource Utilization Record** is now set to zero, 0 hours.



Order #	Resource #	Resource Type	Start Time	Finish Time	Hours	Error?	Error Code
0900131649-10	10385959	Equipment	3/25/2013 12:00:00 AM	3/25/2013 1:00:00 PM	7:00	False	Not Defined
0900131649-10	10252034	Equipment	3/25/2013 12:00:00 AM	3/25/2013 1:00:00 PM	7:00	False	Not Defined
0900131649-10	11670929	Equipment	3/25/2013 12:00:00 AM	3/25/2013 1:00:00 PM	7:00	False	Not Defined
0900131649-10	500815	Individual	3/25/2013 12:00:00 AM	3/25/2013 1:00:00 PM	7:00	False	Not Defined
[illegible]	[illegible]	Equipment	[illegible]	[illegible]	[illegible]	[illegible]	Not Defined
0900131649-10	104839	Individual	3/25/2013 12:00:00 AM	3/25/2013 1:00:00 PM	0:00	False	Not Defined
[illegible]	[illegible]	Individual	[illegible]	[illegible]	[illegible]	False	Not Defined
0900131649-10	506191	Individual	1/9/2013 7:00:00 PM	1/10/2013 11:00:00 PM	28.00	False	Not Defined

Resolving Resource Utilization Errors - SAP Related Errors

Error Code	Description
E02	Job is currently being edited

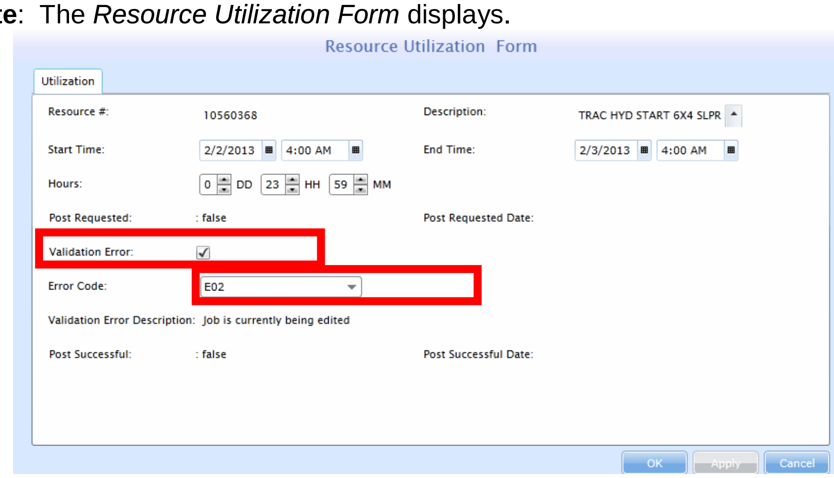
This error is an SAP error and occurs when someone is editing the sales order in SAP while someone is trying to create a partial or final posting from ClickSchedule. The solution is to clear the error and attempt to partial or final post again.

To resolve a single **E02** error:

Order #	Resource #	Resource Type	Start Time	Finish Time	Hours	Error?	Error Code
0900141480-10	10560368	Equipment	2/2/2013 4:00:00 AM	2/3/2013 4:00:00 AM	23:59	True	E02

1. Double click on the record which displays **True** in column **Error?** for **E02**

Note: The *Resource Utilization Form* displays.



2. Uncheck the **Validation Error** check box.
3. Use the drop-down menu to select **Not Defined** in the **Error code f**ield.
4. Click Apply.
5. Click OK.

To resolve multiple E02, errors:

1. Click the first line item with the error code, **E02.**

Note: The line item is highlighted.

2. Hold down the **SHIFT key** on the keyboard.
3. Click the last line item with the same error code, **E02.**
4. Release **SHIFT key** on the keyboard.

Note: All line item records are selected.

5. Right click anywhere in the highlighted area, a pop up menu displays.

6. Select the **Clear All Errors** button,  .

Result: All selected records with errors have been cleared.

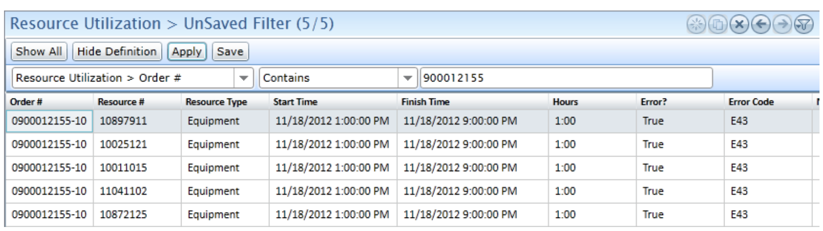
Error Code	Description
E43	Conflicts exist for this equipment
E44	Conflicts exist for this personnel

These errors occurred when trying to update **ZJSLN - SAP Job Scheduling Board**. The reason for these errors:

1) An order in SAP has hours posted or listed in ZJLSN for specific equipment/individuals with the same time, for which you are trying to post.

NOTE: The process used to reconcile conflicts for equipment and individuals in SAP is the same.

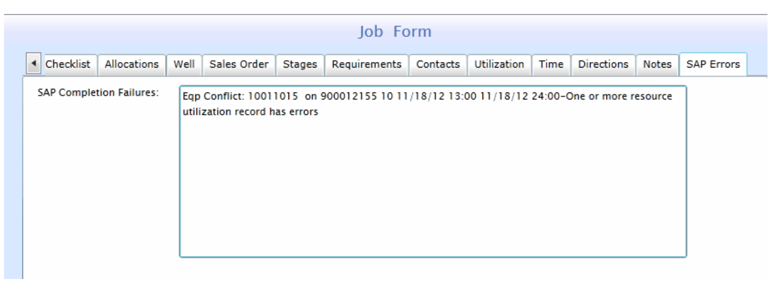
The example below is illustrating how to resolve an equipment conflict in SAP.



Order #	Resource #	Resource Type	Start Time	Finish Time	Hours	Error?	Error Code
0900012155-10	10897911	Equipment	11/18/2012 1:00:00 PM	11/18/2012 9:00:00 PM	1:00	True	E43
0900012155-10	10025121	Equipment	11/18/2012 1:00:00 PM	11/18/2012 9:00:00 PM	1:00	True	E43
0900012155-10	10011015	Equipment	11/18/2012 1:00:00 PM	11/18/2012 9:00:00 PM	1:00	True	E43
0900012155-10	11041102	Equipment	11/18/2012 1:00:00 PM	11/18/2012 9:00:00 PM	1:00	True	E43
0900012155-10	10872125	Equipment	11/18/2012 1:00:00 PM	11/18/2012 9:00:00 PM	1:00	True	E43

To resolve this error:

1. Open the **Job Builder view**.
2. Filter by the **Order #**.
3. Double click on the appropriate Job.
4. Click the **SAP Errors** tab to obtain more information about the error.



5. Go back to the **Resource Utilization View**.
6. Review the conflicts that exist. (Is the conflict by 1 minute? or Was the wrong time entered? or Did someone post the wrong resource due to a typo?)
7. Resolve the conflict by adjusting necessary information in Resource Utilization view.

Note: In this example, the conflict is with itself. This may require assistance from your Regional OTC Champion.

Result: All errors have been cleared.

Error Code	Description
E69	SAP Master Data, Controlling Data, Cost Center Data failures

There are several types of **E69 Error Codes**. It is important to read the error code and contact the appropriate OTC Champion or follow the PSL specific guidelines on point of contact for these errors.

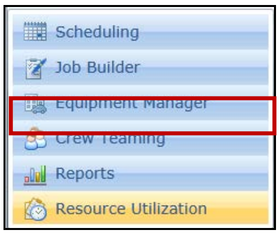
Some of the typical SAP Master Data are listed as follows:

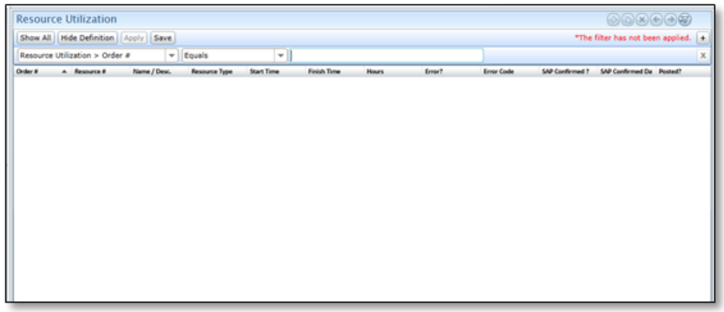
- Cost center HCCA/1001470500 is blocked against indirect postings on 01/07/2013 - Posting transaction failed.
- Create a master record for 1029210711/K00053-Posting transaction failed.
- A master record for 1002710016/K00008 exists only in 2012-Posting transaction failed.

Resource Utilization View

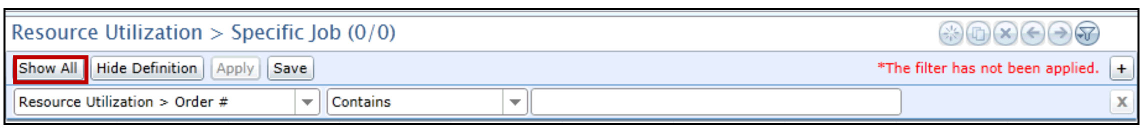
The **Resource Utilization** view allows the user to view hours a resource has spent on the job.

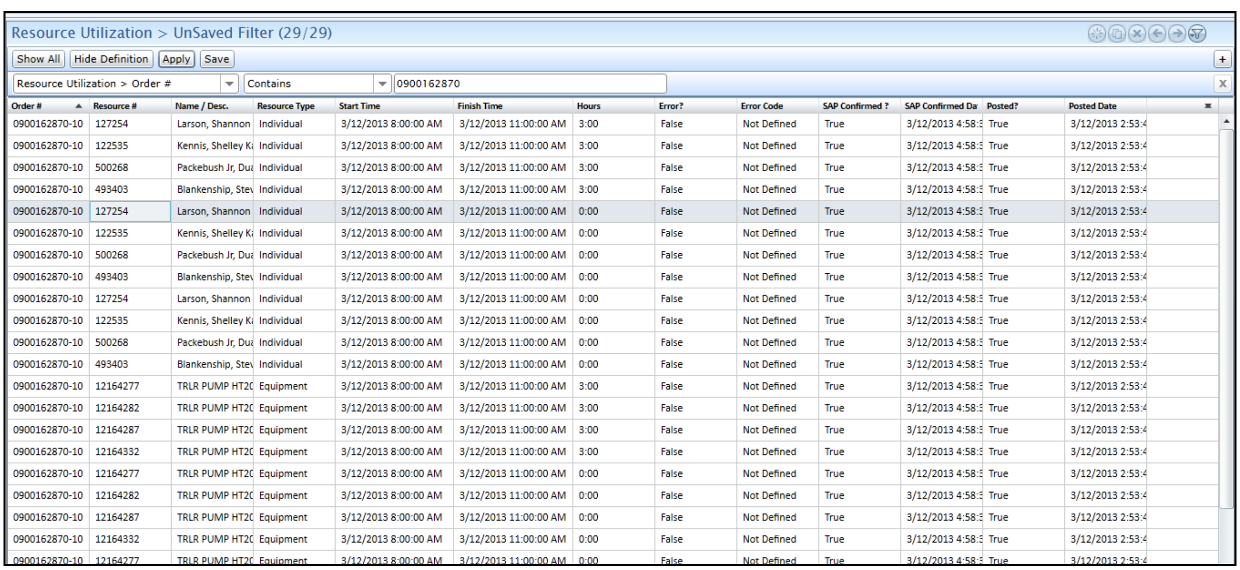
To display the **Resource Utilization** view, click **Resource Utilization** at the bottom of the **View List** panel.





Click the **Show All** button to display all the Halliburton Resource Utilization (HRU) records in the **Resource Utilization** view.





Order #	Resource #	Name / Desc.	Resource Type	Start Time	Finish Time	Hours	Error?	Error Code	SAP Confirmed ?	SAP Confirmed Da	Posted?	Posted Date
0900162870-10	127254	Larson, Shannon	Individual	3/12/2013 8:00:00 AM	3/12/2013 11:00:00 AM	3:00	False	Not Defined	True	3/12/2013 4:58:3	True	3/12/2013 2:53:4
0900162870-10	122535	Kennis, Shelley Ka	Individual	3/12/2013 8:00:00 AM	3/12/2013 11:00:00 AM	3:00	False	Not Defined	True	3/12/2013 4:58:3	True	3/12/2013 2:53:4
0900162870-10	500268	Packebush Jr, Dua	Individual	3/12/2013 8:00:00 AM	3/12/2013 11:00:00 AM	3:00	False	Not Defined	True	3/12/2013 4:58:3	True	3/12/2013 2:53:4
0900162870-10	493403	Blankenship, Stev	Individual	3/12/2013 8:00:00 AM	3/12/2013 11:00:00 AM	3:00	False	Not Defined	True	3/12/2013 4:58:3	True	3/12/2013 2:53:4
0900162870-10	127254	Larson, Shannon	Individual	3/12/2013 8:00:00 AM	3/12/2013 11:00:00 AM	0:00	False	Not Defined	True	3/12/2013 4:58:3	True	3/12/2013 2:53:4
0900162870-10	122535	Kennis, Shelley Ka	Individual	3/12/2013 8:00:00 AM	3/12/2013 11:00:00 AM	0:00	False	Not Defined	True	3/12/2013 4:58:3	True	3/12/2013 2:53:4
0900162870-10	500268	Packebush Jr, Dua	Individual	3/12/2013 8:00:00 AM	3/12/2013 11:00:00 AM	0:00	False	Not Defined	True	3/12/2013 4:58:3	True	3/12/2013 2:53:4
0900162870-10	493403	Blankenship, Stev	Individual	3/12/2013 8:00:00 AM	3/12/2013 11:00:00 AM	0:00	False	Not Defined	True	3/12/2013 4:58:3	True	3/12/2013 2:53:4
0900162870-10	127254	Larson, Shannon	Individual	3/12/2013 8:00:00 AM	3/12/2013 11:00:00 AM	0:00	False	Not Defined	True	3/12/2013 4:58:3	True	3/12/2013 2:53:4
0900162870-10	122535	Kennis, Shelley Ka	Individual	3/12/2013 8:00:00 AM	3/12/2013 11:00:00 AM	0:00	False	Not Defined	True	3/12/2013 4:58:3	True	3/12/2013 2:53:4
0900162870-10	500268	Packebush Jr, Dua	Individual	3/12/2013 8:00:00 AM	3/12/2013 11:00:00 AM	0:00	False	Not Defined	True	3/12/2013 4:58:3	True	3/12/2013 2:53:4
0900162870-10	493403	Blankenship, Stev	Individual	3/12/2013 8:00:00 AM	3/12/2013 11:00:00 AM	0:00	False	Not Defined	True	3/12/2013 4:58:3	True	3/12/2013 2:53:4
0900162870-10	12164277	TRLR PUMP HT2C	Equipment	3/12/2013 8:00:00 AM	3/12/2013 11:00:00 AM	3:00	False	Not Defined	True	3/12/2013 4:58:3	True	3/12/2013 2:53:4
0900162870-10	12164282	TRLR PUMP HT2C	Equipment	3/12/2013 8:00:00 AM	3/12/2013 11:00:00 AM	3:00	False	Not Defined	True	3/12/2013 4:58:3	True	3/12/2013 2:53:4
0900162870-10	12164287	TRLR PUMP HT2C	Equipment	3/12/2013 8:00:00 AM	3/12/2013 11:00:00 AM	3:00	False	Not Defined	True	3/12/2013 4:58:3	True	3/12/2013 2:53:4
0900162870-10	12164332	TRLR PUMP HT2C	Equipment	3/12/2013 8:00:00 AM	3/12/2013 11:00:00 AM	3:00	False	Not Defined	True	3/12/2013 4:58:3	True	3/12/2013 2:53:4
0900162870-10	12164277	TRLR PUMP HT2C	Equipment	3/12/2013 8:00:00 AM	3/12/2013 11:00:00 AM	0:00	False	Not Defined	True	3/12/2013 4:58:3	True	3/12/2013 2:53:4
0900162870-10	12164282	TRLR PUMP HT2C	Equipment	3/12/2013 8:00:00 AM	3/12/2013 11:00:00 AM	0:00	False	Not Defined	True	3/12/2013 4:58:3	True	3/12/2013 2:53:4
0900162870-10	12164287	TRLR PUMP HT2C	Equipment	3/12/2013 8:00:00 AM	3/12/2013 11:00:00 AM	0:00	False	Not Defined	True	3/12/2013 4:58:3	True	3/12/2013 2:53:4
0900162870-10	12164332	TRLR PUMP HT2C	Equipment	3/12/2013 8:00:00 AM	3/12/2013 11:00:00 AM	0:00	False	Not Defined	True	3/12/2013 4:58:3	True	3/12/2013 2:53:4
0900162870-10	12164277	TRLR PUMP HT2C	Equipment	3/12/2013 8:00:00 AM	3/12/2013 11:00:00 AM	0:00	False	Not Defined	True	3/12/2013 4:58:3	True	3/12/2013 2:53:4

The following columns are displayed for each HRU:

1. **Order #:** Displays the sales order number – BOM line item number for the job
2. **Resource #**: Displays the SAP ID
3. **Name/Desc.:** Displays the name of the resource
4. **Resource Type**: Displays the type of resource
5. **Start Time**: Displays the time when the utilization of a resource starts
6. **Finish Time**: Displays the time when the utilization of a resource ends
7. **Hours**: Displays the exposure hours of a resource for that record
8. **Error?**: Displays "True" if there is an error on the record
9. **Error Code**: Displays the error code of the validation failure. The following table describes the possible error codes:

Error Code	Description	Error Code	Description	Error Code	Description
C01	End date must be greater or equal to start date	E19	Equipment not schedulable	E41	End date must not be blank or after invoice date
C02	Exposure hours greater than schedule duration	E20	Invalid equipment status	E42	Scheduling indicator must be yes or no for this order type
C03	Conflicts exist for this equipment	E21	Invalid personnel status	E43	Conflicts exist for this equipment
C04	Conflicts exist for this personnel	E22	End date must be greater or equal to start date	E44	Conflicts exist for this personnel
E01	Job not found	E23	Start date must be within 5 years of today's date	E45	Cannot delete completed equipment
E02	Job is currently being edited	E24	End date must be within 5 years of today's date	E46	Cannot delete completed personnel
E03	Job type not schedulable	E25	No authority to update job status	E47	Cannot delete a component
E04	Cannot change a completed job	E26	No authority to update personnel	E48	Invalid user name

E05	Invalid status change	E27	No authority to update equipment	E49	Invalid source flag
E06	Invalid start date	E28	No authority for sales org	E50	Start date and end date required
E07	Invalid start time	E29	Problem deleting record lock	E51	No equipment found
E08	Invalid end date	E30	Problem updating job table	E52	No personnel found
E09	Invalid end time	E31	Problem updating equipment table	E53	Invalid selection sign, I or E only
E10	Invalid personnel number	E32	Problem updating personnel table	E54	Invalid selection option, EQ, BT, CP, LE, GE, NE, NB, NP, GT, or LT only
E11	Start date greater than end date	E33	Not updated	E55	Must enter equipment#, cost center, or activity type
E12	Start date and end date must be within 5 years	E34	Not Added	E56	Must enter personnel#, cost center, or activity type
E13	Invalid equipment number	E35	Invalid update flag on job	E57	Blank status not allowed
E14	Equipment status is not valid	E36	Problem updating ZASM control fields	E61	Job does not exist in ZASM
E15	Data record and update flag is inconsistent	E37	Exposure hours greater than schedule duration	E62	Job personnel does not exist in ZPRS
E16	Equipment line item not found	E38	Schedules line date in SO not updated	E69	Posting transaction failed
E17	Personnel line item not found	E39	No sub-equipment found	E71	SO internal error
E18	Invalid update indicator	E40	Actuals posted for this item – cannot update	SOI	

Note: An error code starting with **C** means tha an error occurred in ClickSchedule.

An error codes starting with **E** means that an error occurred when attempting to update SAP Job Scheduling Board.

10. **SAP Confirmed?**: Displays “True” if the SAP confirms record has been posted in SAP

11. **SAP Confirmed Date**: Displays the date when confirmation of posting in SAP

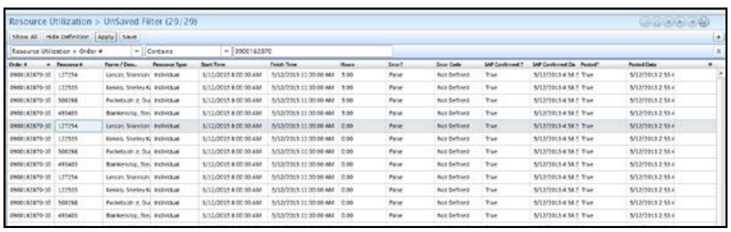
12. **Posted?**: Displays “True” if the record has been posted successfully to SAP (Posted column checked in SAP Scheduling Board)

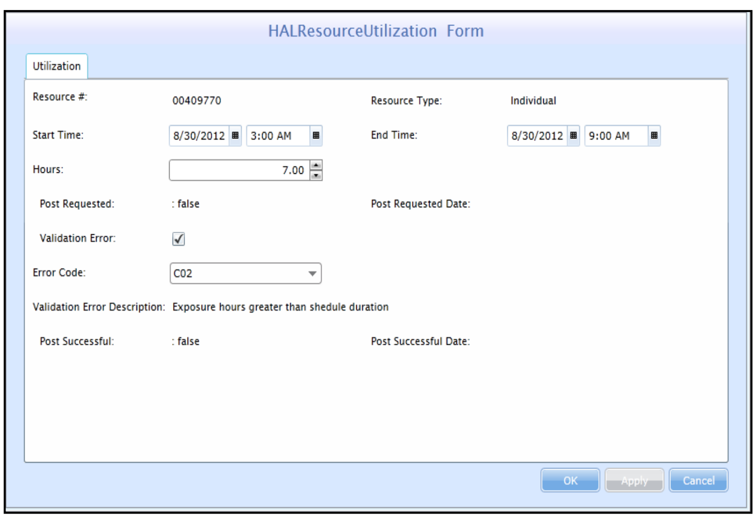
    Note: After the Partial Posting is done and the **Posted** column is set to **True**, the Scheduler cannot edit the exposure hours

13. **Posted Date**: Displays the date when the user sent the request to post records to SAP scheduling board

You can perform the following activities in the **Resource Utilization** view:

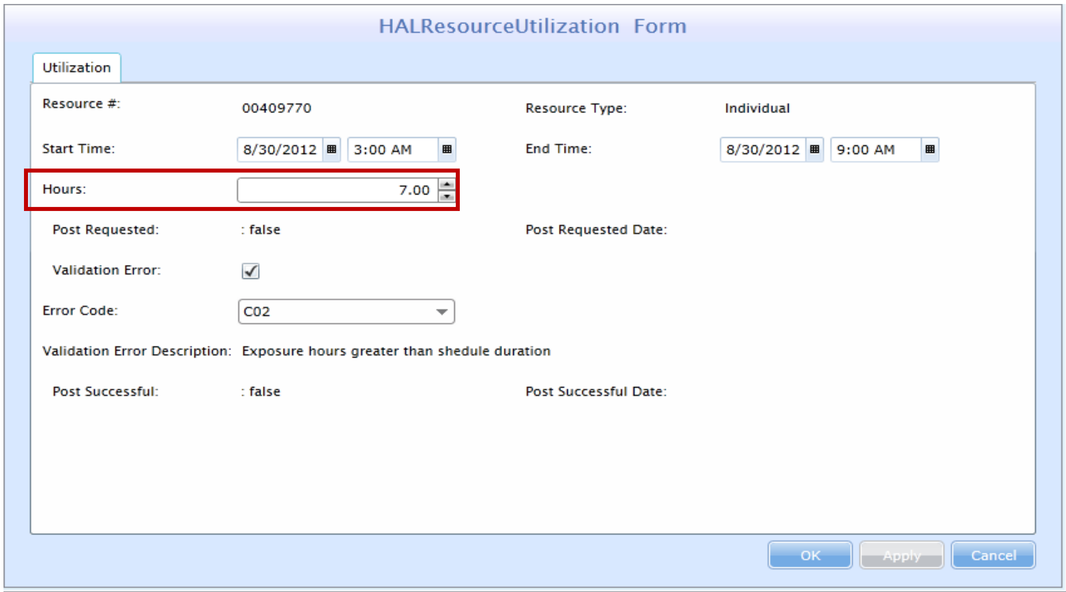
- Double-click any record to display the **HALResourceUtilization Form**.





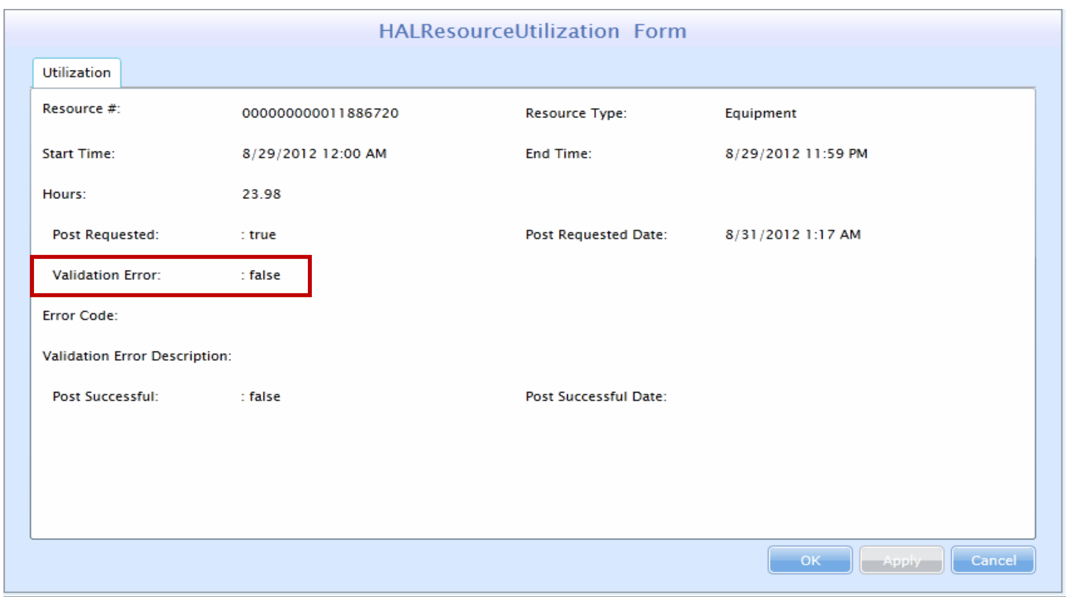
Note: You can also display the **HALResourceUtilization Form** related to the displayed record by clicking the **Resource ID** under the **Business Hierarchy**.

- Edit the exposure hours of a resource in the **Hours:** field on the **HALResourceUtilization Form**.



- Upon making the appropriate corrections, you can uncheck the **Validation Error** checkbox and then click the **Apply** button.

  Note: The record will automatically be sent to SAP and the **Validation Error** field will be updated to "**False**" to indicate there are no more errors within the record.



- Apply filters to view specific records in the right-hand side pane.

  Note: For more information on filters, refer to the **Defining and Applying Filters** Step Instructions document.

  Note: For information on how to edit multiple records at a time or how to resolve errors, refer **to Resolving Resource Utilitzation Errors** QRC.

Running Reports in ClickSchedule

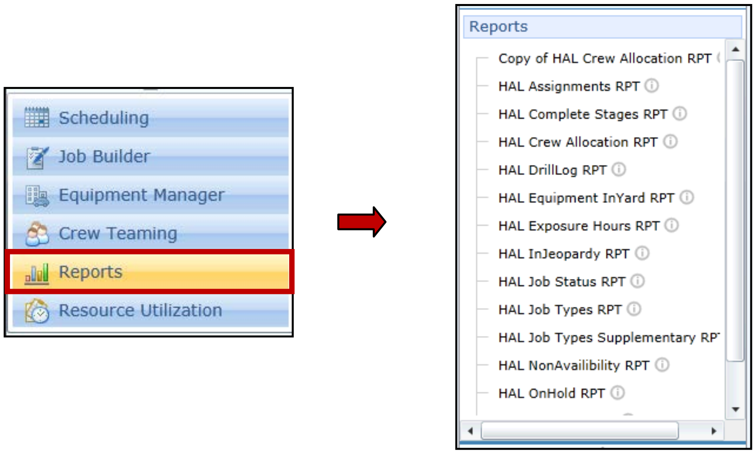
ClickSchedule provides various customized reports to enable users to better analyze business data and results. These reports have the following characteristics:

- Schedulers can run reports for the plants for which they have access.
- Reports can display data for last 60 days.

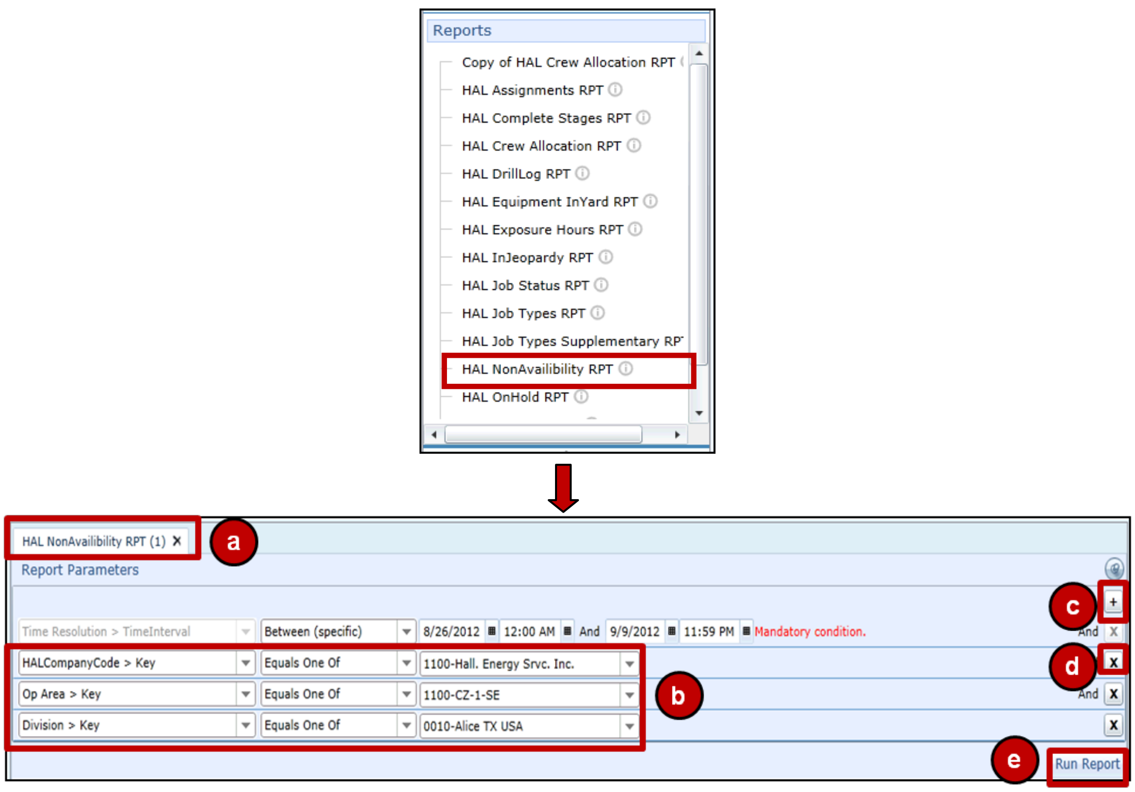
The table below provides a brief description of each report and its applicability by Product Service Line (PSL):

#	Name	Brief Description	PE	CEM	WPS	HCT	DBS	B&C
1	Jobs Status	Summary of all jobs by status and job type	√	√	√	√	√	√
2	Jobs Assignment	Report showing all assigned jobs and their current status	√	√	√	√	√	√
3	On Hold	Summary of all jobs currently On Hold and their reason	√	√	√	√	√	√
4	Job Types	List of all jobs by job type	√	√	√	√	√	√
5	Job Types Supplementary	Summary of all equipment spotting jobs	√	√	X	X	X	X
6	In Jeopardy	Summary of all jobs that are in a current state of jeopardy	√	√	√	√	√	√
7	Equipment and Individual Exposure Hours	Summary report about equipment use and individual exposure on jobs	√	√	√	√	√	√
8	Resource Schedule	Schedule for specific resources with assignment details	√	√	√	√	√	√
9	Non-Availability	Provides a summary of non-availabilities	√	√	√	√	√	√
10	Completed Stages	Daily summary of completed stages - grouped by crew and plant	√	X	√	√	X	X
11	Crew Allocation	Detailed list of all individuals and equipment allocated to a crew	√	√	√	√	√	√
12	Equipment in Yard	Summary of equipment that is not allocated to a crew and does not have a non-availability	√	√	√	√	√	√
13	Proppant	Summary of proppant details by job	√	X	X	X	X	X
14	Drill Log	Summary of field drilling status by well bore interval, run, and tool	X	X	X	X	√	X

To view the list of available reports in ClickSchedule, click the **Reports** tab in the **View List** panel.



You can view a report by double-clicking the report from the **Reports** pane and selecting the required parameters.



a. Displays the name of the report.

Note: You can display more than one report at a time.

b. Displays the default report parameters. These parameters depend on the data load - date span and business structure that you have loaded in the system.

Note: You can change any of the report parameters.

c. Allows you to add additional filter criteria.

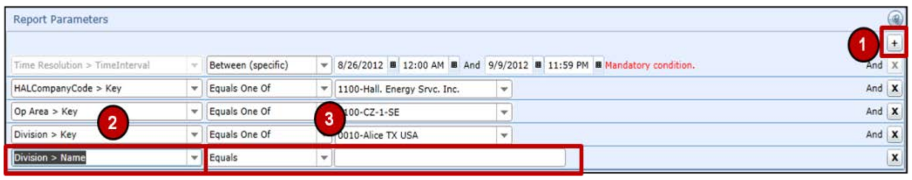
To add a filter:

1. Click the **Add Filter Condition** button.

2. In the first drop-down list, select the parameters based on how the data needs to be filtered.

   Note: Depending on the parameters selected in the first drop-down list, further options to define filter criteria are displayed.

3. Complete the selection of all of the necessary conditions for your filter.

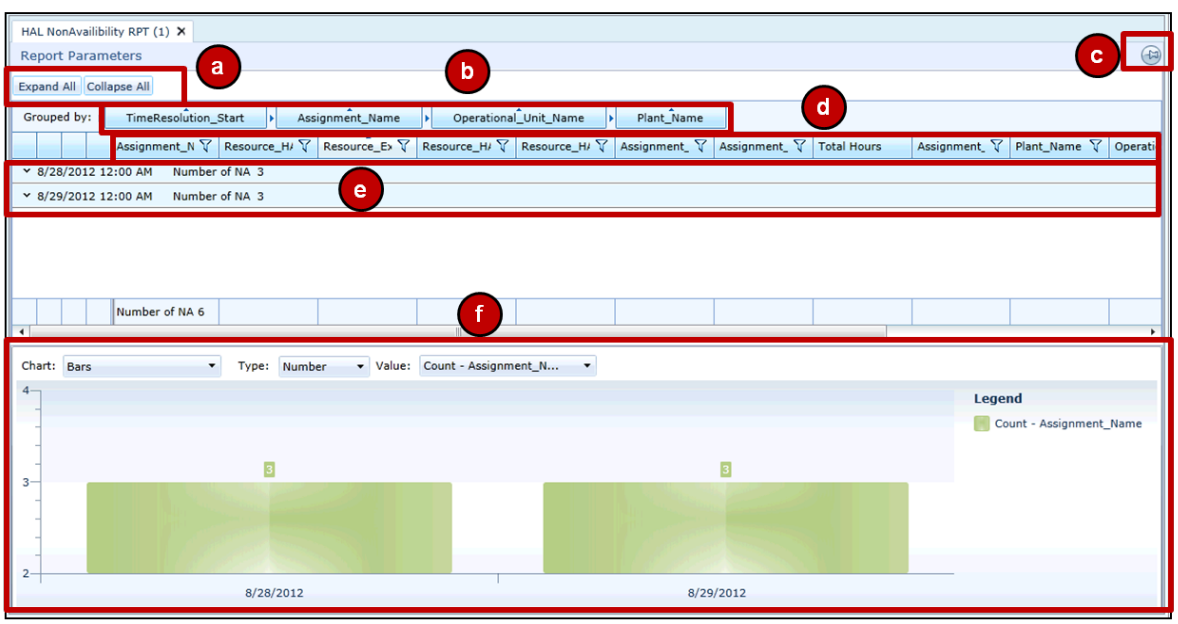


Note: You can add multiple filters to specify the data that you need to view in the report.

d. Allows you to remove a particular filter. For example, if you click the **X** button next to the **Division > Key** line, the report will display job status of all the jobs in the Southeast area - not just the **Alice** plant.

e. After finalizing the report parameters, click the **Run Report** button.

The screenshot below displays a report in ClickSchedule (see below for more information):



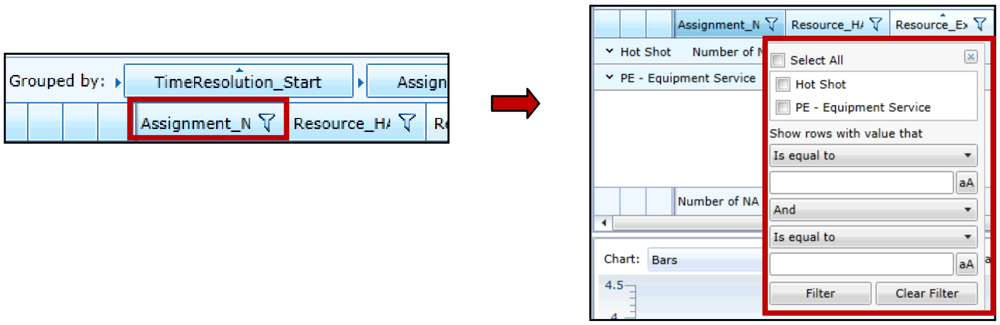
a. Click the **Expand All** or **Collapse All** buttons to expand or collapse all the sections of data.

b. Move or delete data groups to change the way information is displayed in the report.

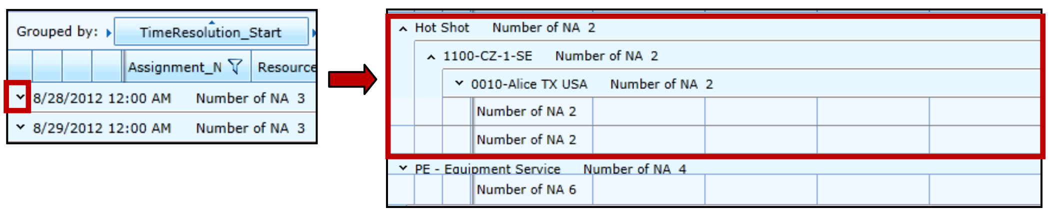
Note: Order grouping begins on the left.

c. Click the **Pin** button to pin or unpin the **Report Parameters** section.

d. Click a column header to filter the information in that column.



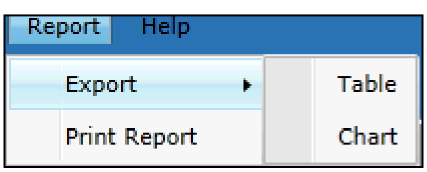
e. Drill-down into a section of the report by clicking the arrow.



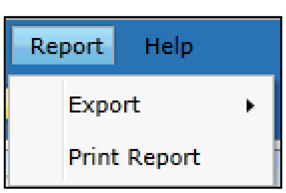
f. Click the drop-down lists to modify the graphical representation of the report.

- **Chart**: Use this drop-down list to select if the data should be represented by a bar graph or a line graph.
- **Type**: Use this drop-down list to choose if the data should be displayed based on numbers, duration, or time.
- **Value**: Use this drop-down list to select the values that should be displayed, if applicable.

You can export report data into a table or chart format. To export data, follow the menu path: **Report > Export** and then select the required format.



You can also print the required report. To print the report, follow the menu path: **Report > Print Report**.



Scheduling Mountain Movers

Certain jobs may require that additional equipment is moved or “spotted” to the job site prior to the actual start of the job. Schedulers will have to use the “Create Equipment and Cleaning Job” functionality for managing these requirements.

- The functionality works by creating duplicate jobs specifically for managing equipment. These duplicate “equipment” jobs inherit all of the job information from the main job.
- These new jobs can then be assigned to the proper equipment. For PE, this functionality will apply specifically to Mountain Movers.

Schedulers are required to identify any equipment that is needed on a location prior to or during a job. In the majority of cases, an existing job is in ClickSchedule and Schedulers determine:

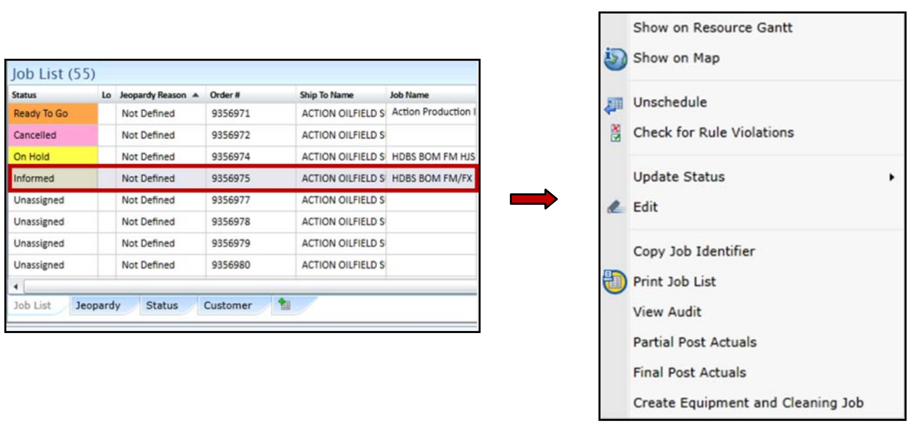
- The number of mountain movers required at the job location
- The estimated duration or time that the Mountain Movers will be on location

Note: If the job does not exist in ClickSchedule, Schedulers should create a Non-Availability for the required equipment and resources. Refer to the **New Non-Availability Form** QRC.

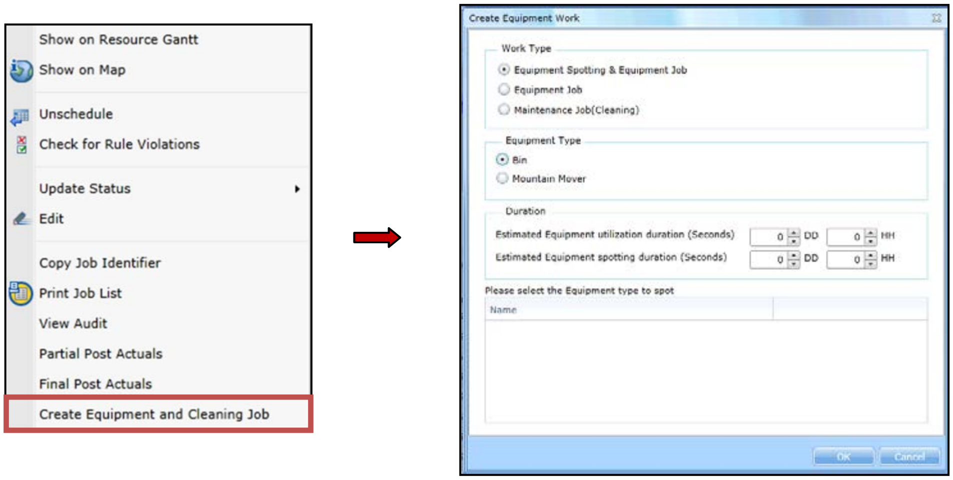
To schedule a Mountain Mover:

1. In the **Scheduling** view, within the **Job List**, right-click the job that needs a Mountain Mover assigned to it. A list of option displays.

Note: This step will have to be done separately for each Mountain Mover that is required.

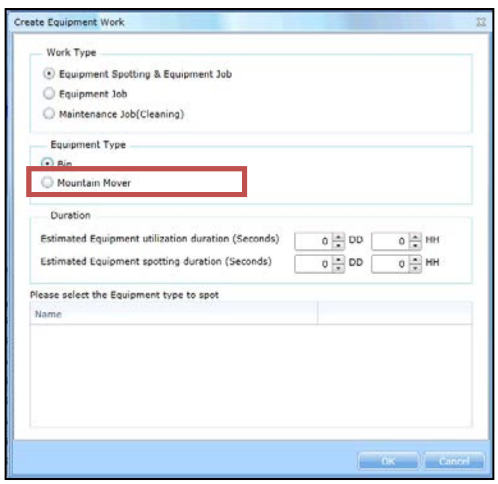


2. Select the **Create Equipment and Cleaning Job** option. The **Create Equipment Work** form displays.



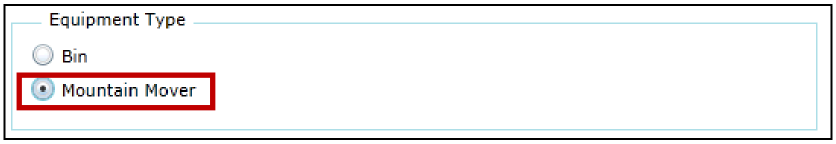
3. In the **Work Type** section, verify that the **Equipment Job** radio button is selected.

Note: The functionality has multiple options, however PE Schedulers will only use the option for "Equipment Job" work-type.

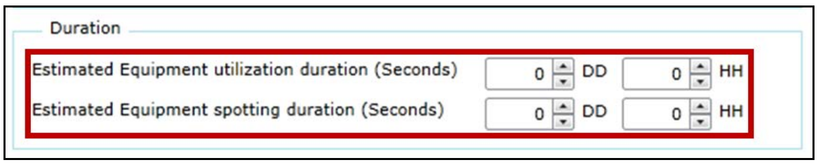


Note: The **Equipment Job** option is used for scheduling and managing the Mountain Mover only. Individuals or tractors required for transporting or working with the Mountain Movers are not scheduled.

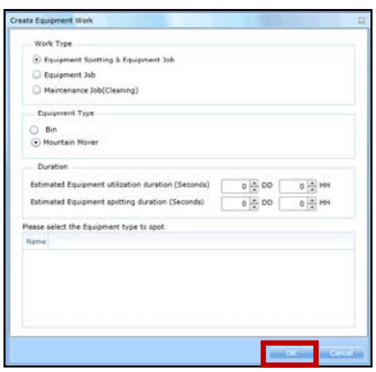
4. In the **Equipment Type** section, select the **Mountain Mover** radio button.

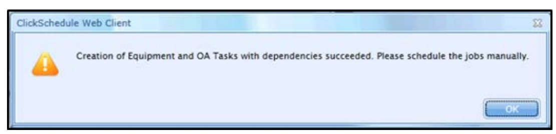


5. In the **Duration** section, select or enter the estimated duration for the Mountain Mover utilization.

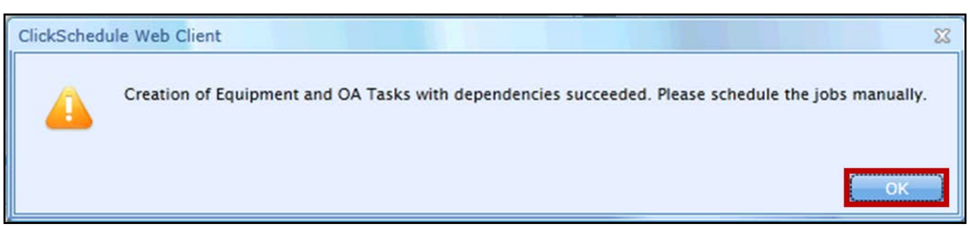


6. Click **OK**. A window with a confirmation message displays.



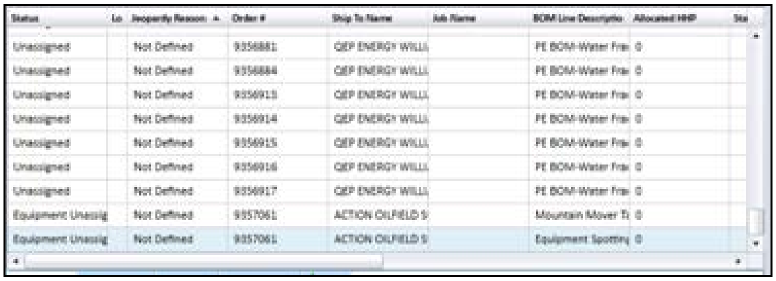


7. Click **OK** to proceed.



8. The new jobs for Mountain Movers will appear in the Job List. You may have to modify the PSL filter to remove the line for Duplicate criteria. Alternatively, you may use the filters for “Bin Spotting Job” to see the jobs you just created.

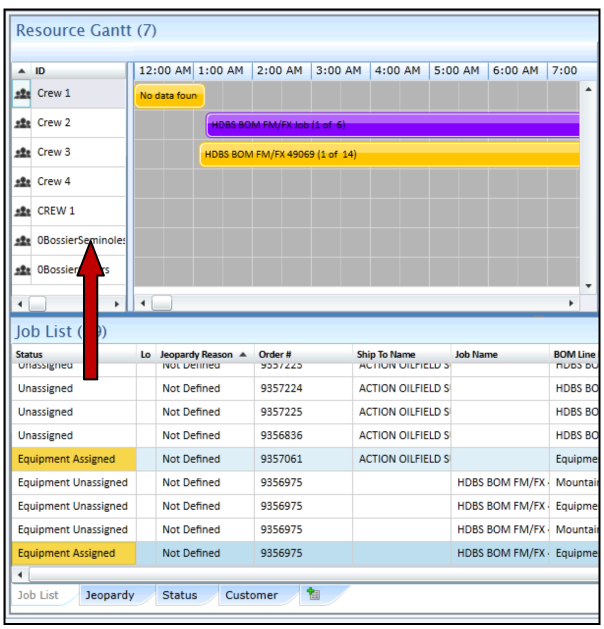
Note: The duplicate jobs are placed at the bottom of the **Job List**.



Status	Lo	Jeopardy Reason	Order #	Ship To Name	Job Name	BOM Line Descriptio	Allocated HHP	Sta
Unassigned		Not Defined	9356881	QEP ENERGY WILL		PE BOM-Water Fra	0	
Unassigned		Not Defined	9356884	QEP ENERGY WILL		PE BOM-Water Fra	0	
Unassigned		Not Defined	9356913	QEP ENERGY WILL		PE BOM-Water Fra	0	
Unassigned		Not Defined	9356914	QEP ENERGY WILL		PE BOM-Water Fra	0	
Unassigned		Not Defined	9356915	QEP ENERGY WILL		PE BOM-Water Fra	0	
Unassigned		Not Defined	9356916	QEP ENERGY WILL		PE BOM-Water Fra	0	
Unassigned		Not Defined	9356917	QEP ENERGY WILL		PE BOM-Water Fra	0	
Equipment Unassig		Not Defined	9357061	ACTION OILFIELD S		Mountain Mover Tı	0	
Equipment Unassig		Not Defined	9357061	ACTION OILFIELD S		Equipment Spotting	0	

Note: Users can also sort on the **Order #** to get a quick visual on equipment jobs in relation to the main job.

9. To assign these jobs in ClickSchedule, drag and drop these jobs directly onto the required Mountain Mover in the **Resource Gantt** chart.



Note: After the job is assigned to the crew, the job status automatically gets updated to **Equipment Assigned**.

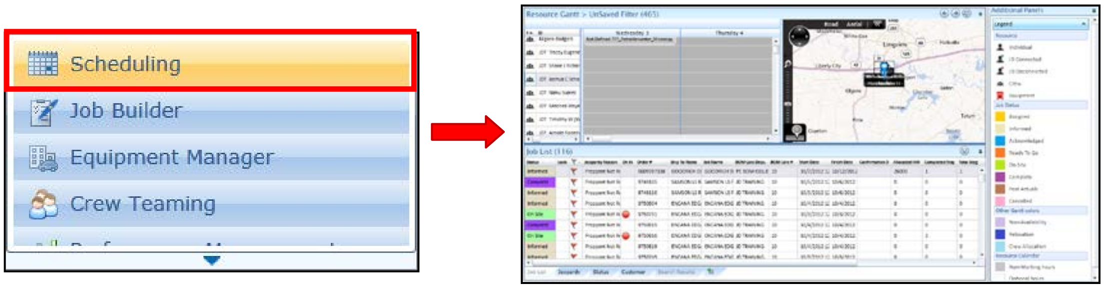
Some of the features of the **Equipment and Equipment Moving Jobs** functionality/requirements are:

- The jobs (Mountain Mover and Equipment Spotting) both need to be scheduled at the same time. They are interdependent.
- The Resource Gantt filters allow Schedulers to identify resources (individuals and equipment) that are identified as being part of Equipment and Equipment Moving jobs.
- The location information for the Equipment and Equipment Moving Jobs is automatically set depending upon the assignment. The Latitude-Longitude information is updated to the job's location when the status is On Site.
- The equipment job will automatically extend for one day until the Scheduler marks the job as "Complete". This will support visibility of the equipment until it is returned to the plant.
- A separate equipment checkbox Ready For Use is provided on the General tab of the Resource form.
- Utilization records are established for resources used in these jobs and are submitted with the parent job for Post Actuals.

AIR COMPRESSOR, COMMAND CTR, GENScheduling View

The **Scheduling** view provides a comprehensive view of the job workload and the jobs assigned to each resource.

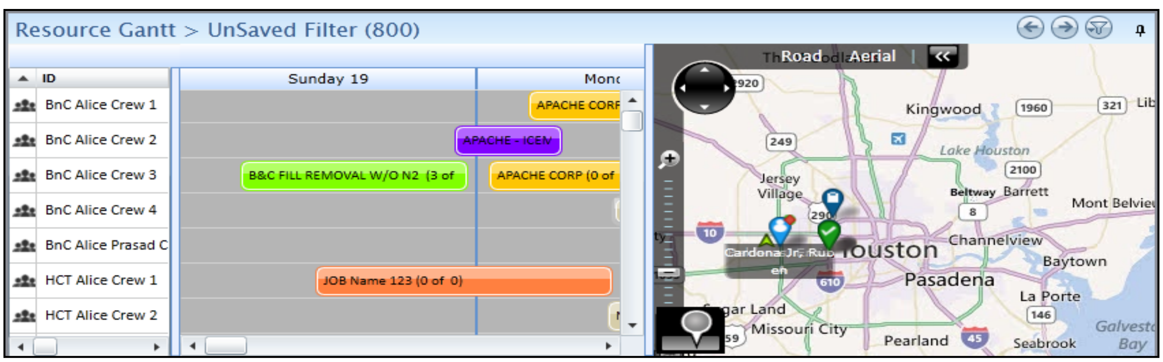
To display the **Scheduling** view, click the **Scheduling** tab in the **Navigation** pane.



The **Scheduling** view consists of the following key components:

- Resource Gantt panel
- Job List
- Legend

Resource Gantt Panel



The **Resource Gantt** panel provides a graphic representation of the schedule details. It includes the **Resource Gantt** chart and the **Map**.

Resource Gantt chart:

- The jobs assigned to each crew are listed in the corresponding row in the **Resource Gantt** chart.
- The **Resource List** appears on the left side of the **Resource Gantt** chart and lists crews for the currently loaded business structure.

NOTE: Other resources (individuals and equipment) can be displayed in the **Resource List** by applying filters. Refer to the **Using the Resource Gantt Chart** QRC for more information.

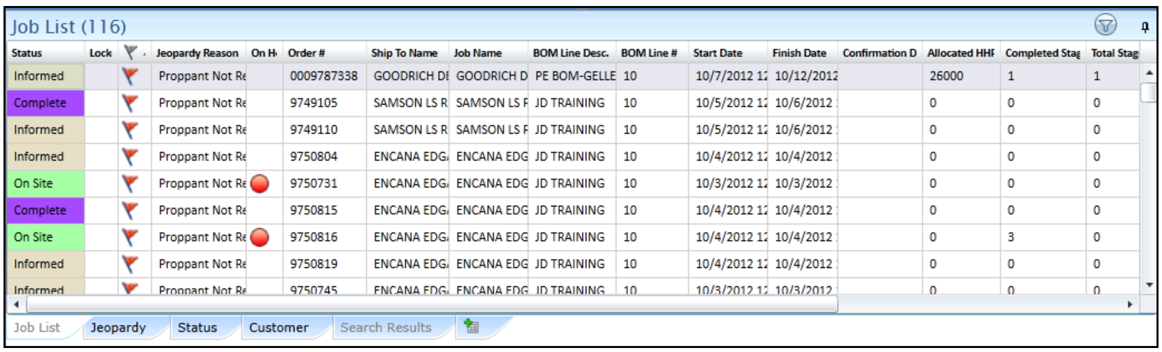
Map:

- The **Map** appears on the right side of the **Resource Gantt** chart. It enables the users to view the distribution of jobs on the map in real time.
    - When a resource icon is clicked, the corresponding location details are displayed in a pop-up balloon on the map.
    - The **Map** view displays scheduled resources for a maximum of 24 hours starting from the current time.
  - A maximum of 40 resources can be displayed at one time.
- For more information, refer to the **Working with Maps** QRC.

Job List

The **Job List** is a dynamic work area that displays information about all of the jobs that have been transferred from SAP to ClickSchedule. The jobs displayed in the **Job List** are defined by the current data load, but unassigned jobs will always display regardless of the data load.

The total number of the jobs present in the list is shown in parentheses at the top of the **Job List**.


Job List (116)

Status	Lock		Jeopardy Reason	On H	Order #	Ship To Name	Job Name	BOM Line Desc.	BOM Line #	Start Date	Finish Date	Confirmation D	Allocated HHF	Completed Stag	Total Stag
Informed			Proppant Not Re		0009787338	GOODRICH DI	GOODRICH D	PE BOM-GELLE	10	10/7/2012 1:	10/12/2012		26000	1	1
Complete			Proppant Not Re		9749105	SAMSON LS R	SAMSON LS F	JD TRAINING	10	10/5/2012 1:	10/6/2012		0	0	0
Informed			Proppant Not Re		9749110	SAMSON LS R	SAMSON LS F	JD TRAINING	10	10/5/2012 1:	10/6/2012		0	0	0
Informed			Proppant Not Re		9750804	ENCANA EDG.	ENCANA EDG	JD TRAINING	10	10/4/2012 1:	10/4/2012		0	0	0
On Site			Proppant Not Re		9750731	ENCANA EDG.	ENCANA EDG	JD TRAINING	10	10/3/2012 1:	10/3/2012		0	0	0
Complete			Proppant Not Re		9750815	ENCANA EDG.	ENCANA EDG	JD TRAINING	10	10/4/2012 1:	10/4/2012		0	0	0
On Site			Proppant Not Re		9750816	ENCANA EDG.	ENCANA EDG	JD TRAINING	10	10/4/2012 1:	10/4/2012		0	3	0
Informed			Proppant Not Re		9750819	ENCANA EDG.	ENCANA EDG	JD TRAINING	10	10/4/2012 1:	10/4/2012		0	0	0
Informed			Proppant Not Re		9750745	ENCANA EDG.	ENCANA EDG	JD TRAINING	10	10/3/2012 1:	10/3/2012		0	0	0

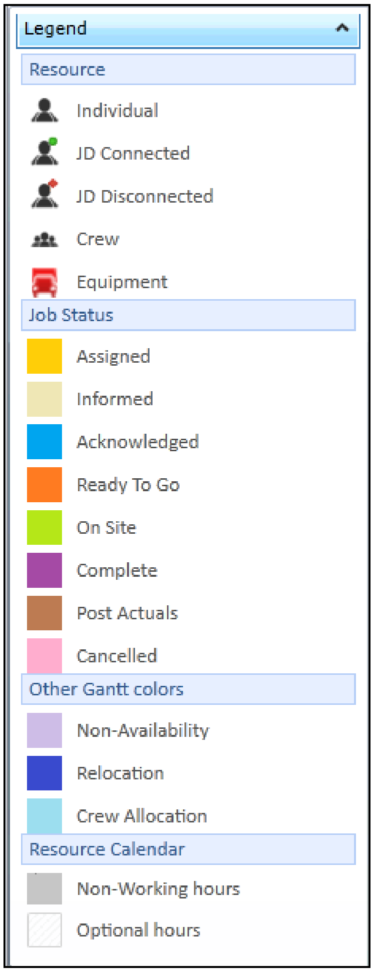
Within the **Job List**, you can:

- Double-click the required job to display **Edit Job** form.
- Right-click any job and select the **Update Status** option to update the job status.
- Click the **Filter** icon on the top-right corner of the **Job List** to filter jobs.

For more information, refer to the **Job List** QRC.

Legend

The **Legend** displays the specific icons, color schemes, and shading patterns used to indicate the types of resources and types of working time.



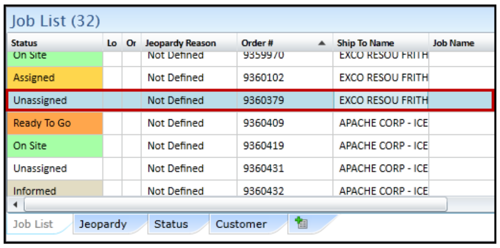
For more information, refer to the **Legend** QRC.

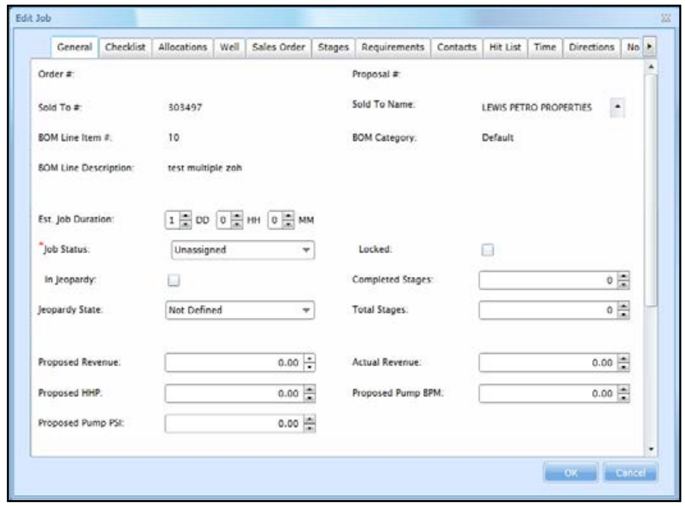
Setting Up Individual Stages for Reporting

Use the following steps to set up individual stages for reporting:

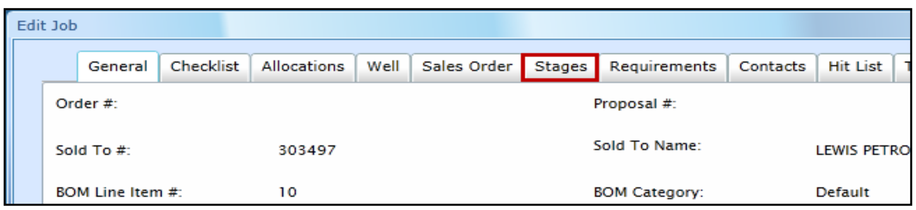
> **Note**: Not all PSLs have multi-stage jobs. For those that do, ClickSchedule allows the tracking of various data per stage.

1. In the **Scheduling** view, double-click the required job in the **Job List**. The **Edit Job** form displays.

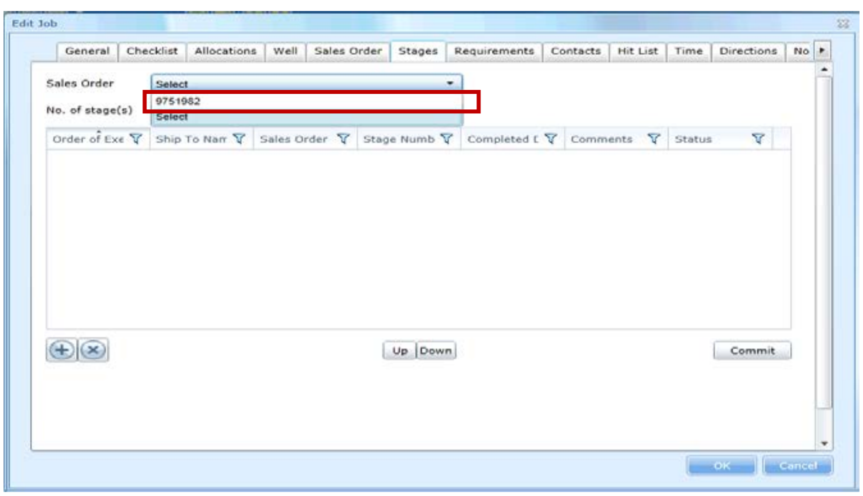




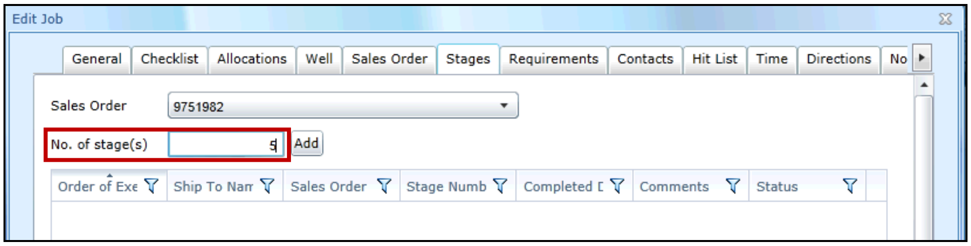
2. Click the **Stages** tab.



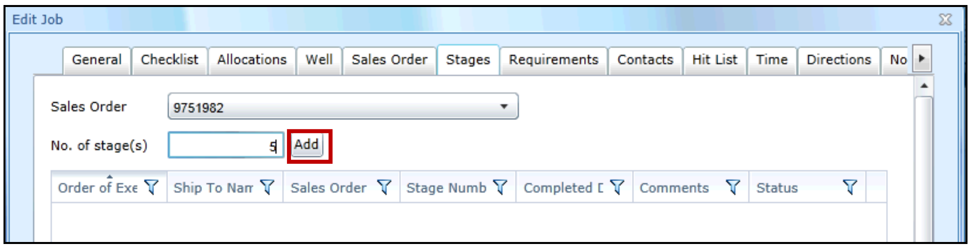
3. Select the required sales order from the **Sales Order** drop-down list.

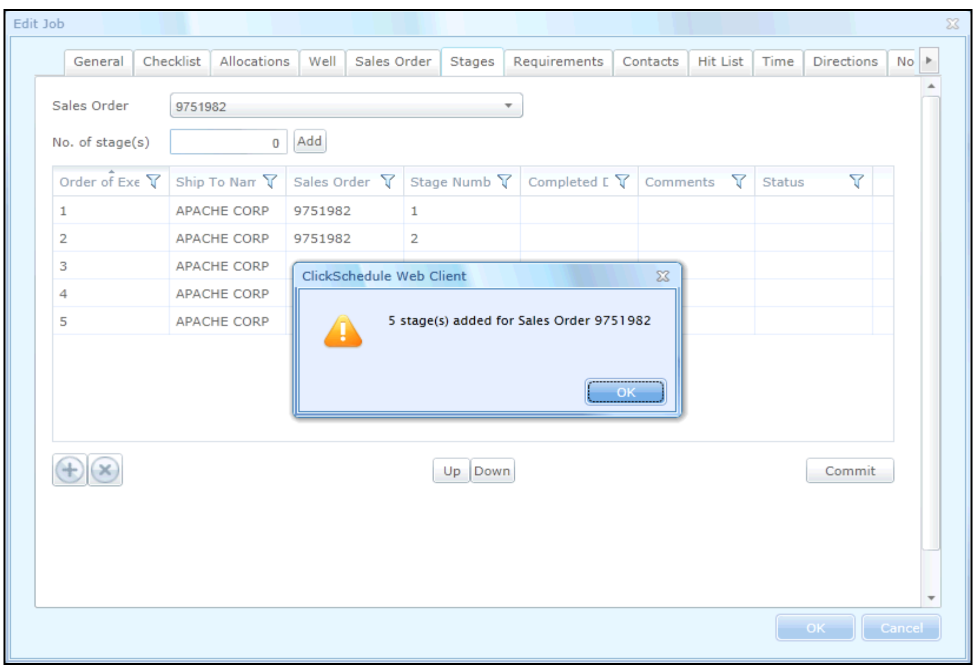


4. Enter the total number of stages in the **No. of stage(s)** field.



5. Click the **Add** button. A window with a confirmation message displays.

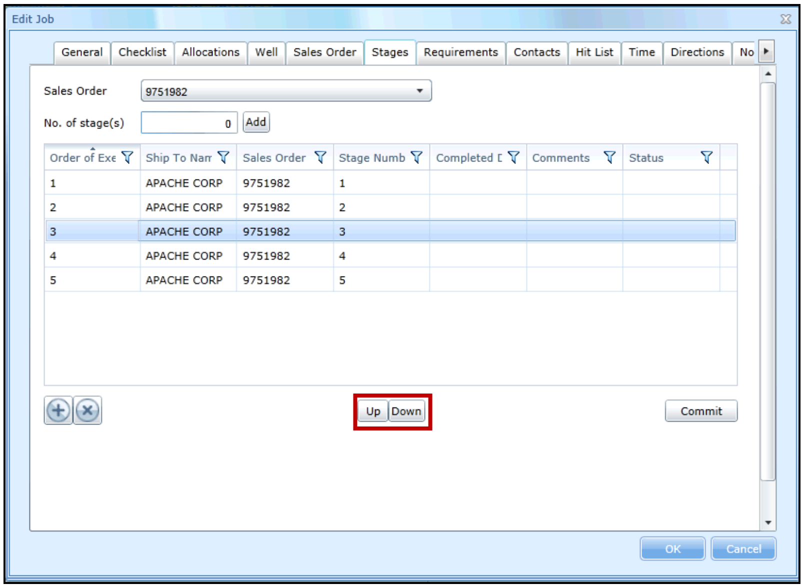




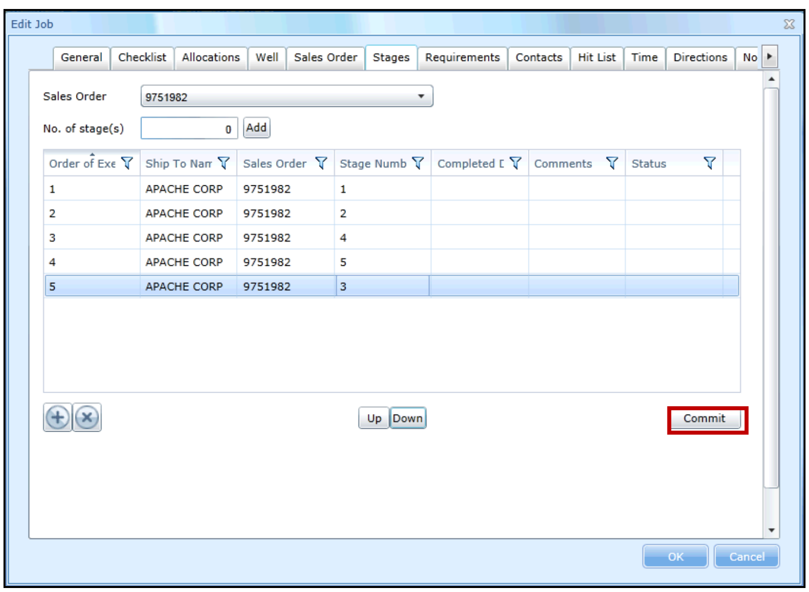
Note: If stages are required for another sales order, then select the required sales order from the **Sales Order** drop-down list and perform steps 4 and 5.

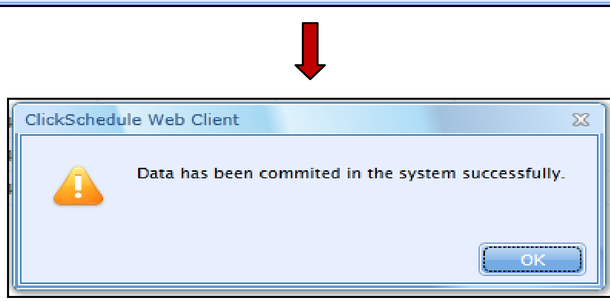
6. To adjust the order of stages:

   - Click the required stage in the grid.
   - Click the Up or Down button to move the stage up or down in the grid.

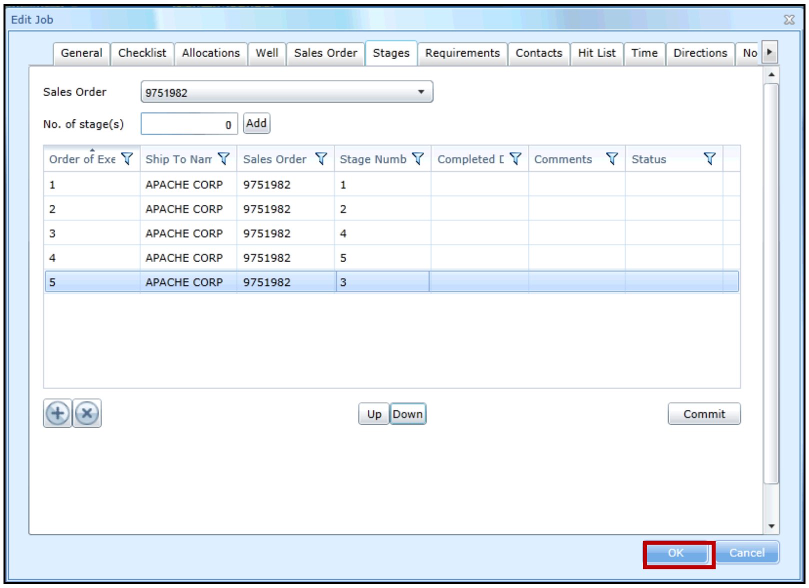


7. Click the **Commit** button to save changes. A window with a confirmation message displays.





8. Click the **OK** button to return to the **Job List**.

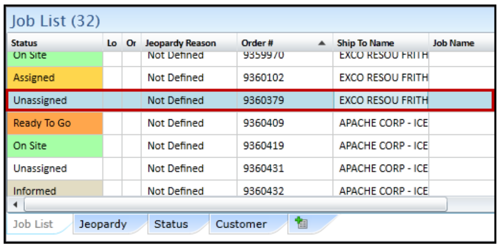


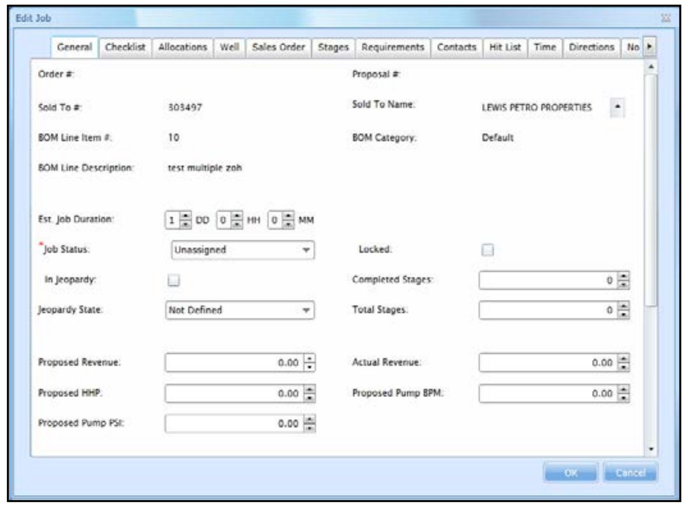
Setting Up Individual Stages

Use the following steps to set up individual stages:

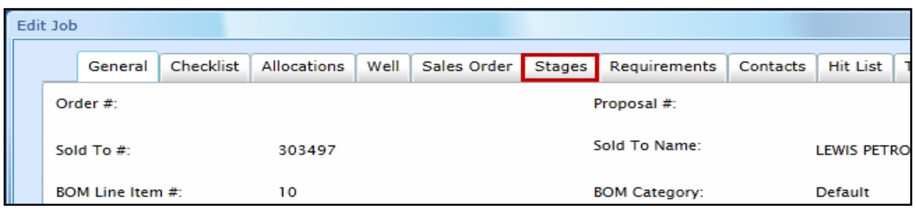
> **Note**: Not all PSLs have multi-stage jobs. For those that do, ClickSchedule allows the tracking of various data per stage.

1. In the **Scheduling** view, double-click the required job in the **Job List**. The **Edit Job** form displays.

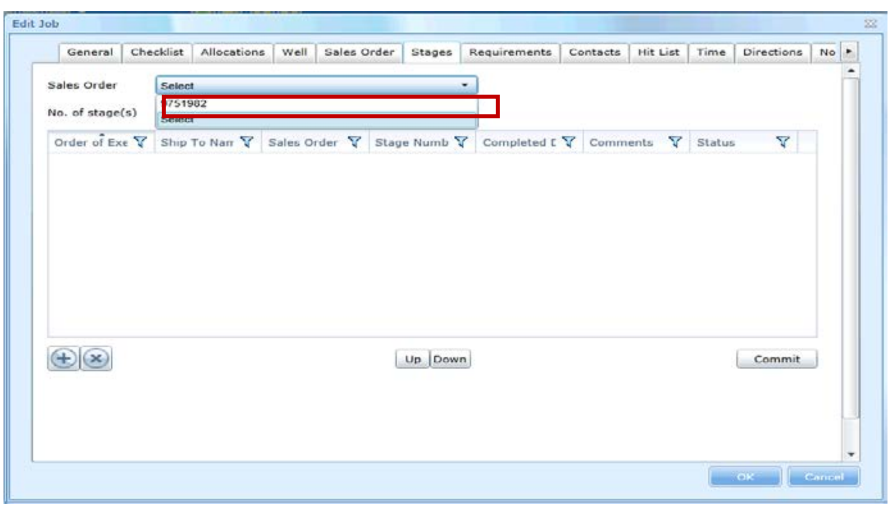




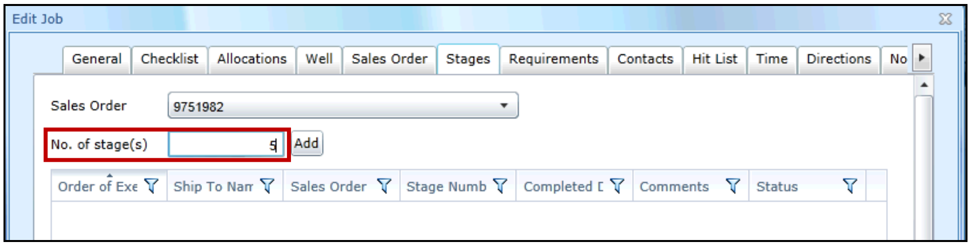
2. Click the **Stages** tab.



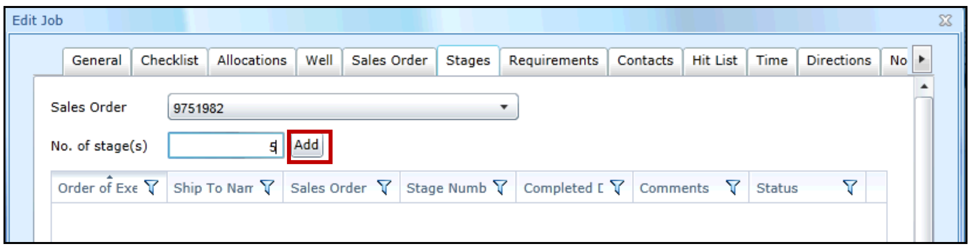
3. Select the required sales order from the **Sales Order** drop-down list.

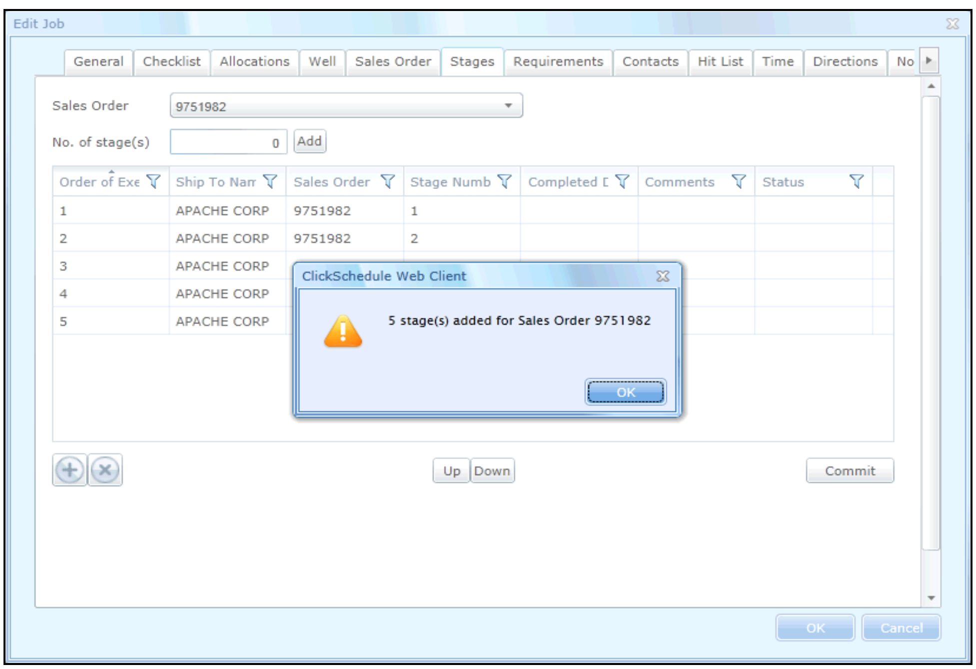


4. Enter the total number of stages in the **No. of stage(s)** field.



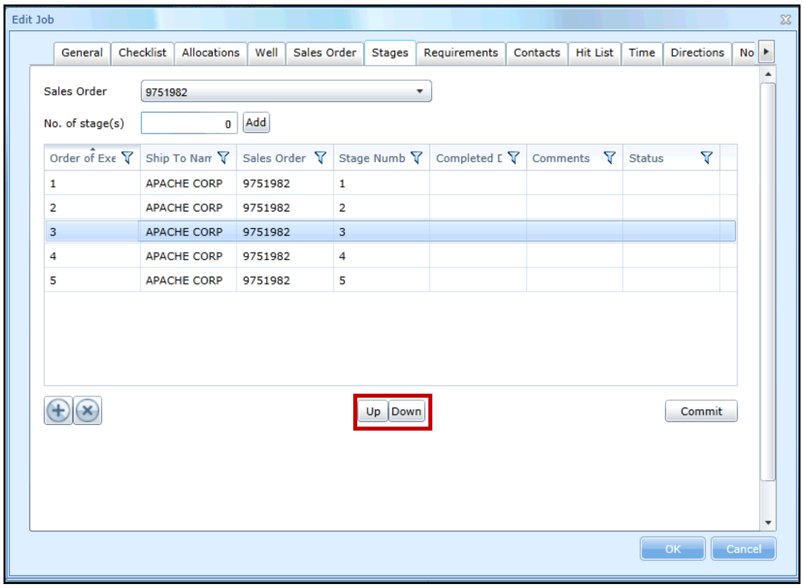
5. Click the **Add** button. A window with a confirmation message displays.





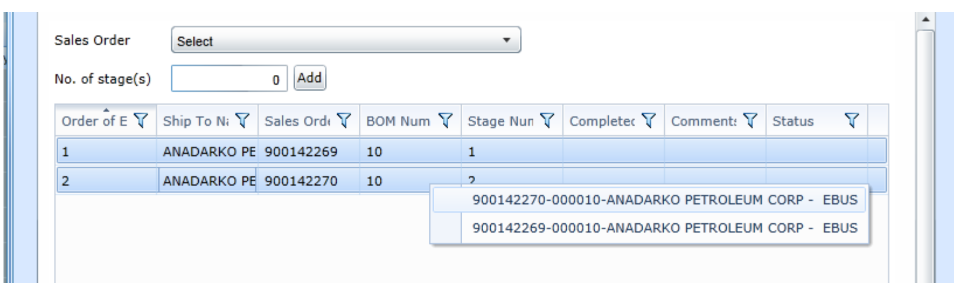
Note: If stages are required for another sales order, select the required sales order from the **Sales Order** drop-down list and perform steps 4 and 5.

6. To adjust the order of stages:
   - Click the required stage in the grid.
   - Click the **Up** or **Down** button to move the stage up or down in the grid.

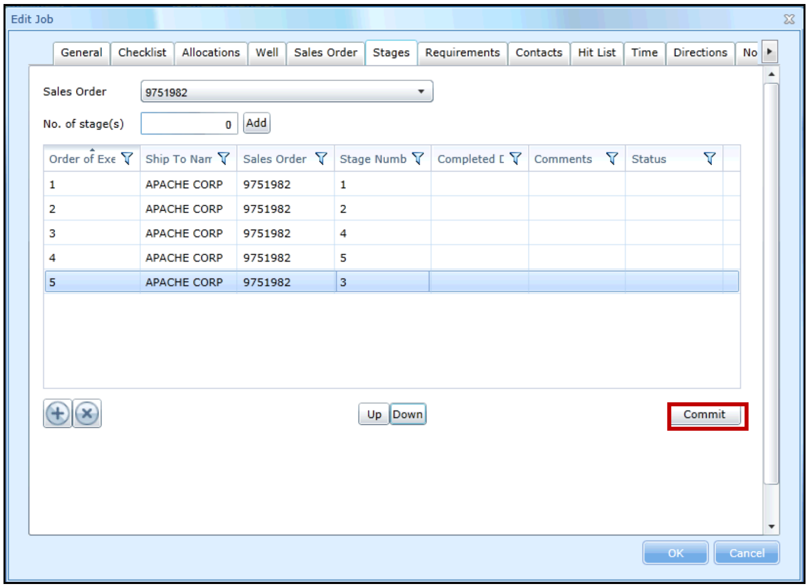


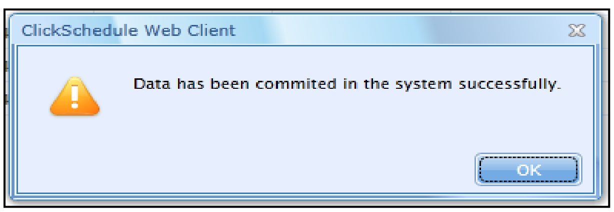
7. To reassign a stage to another ZOH:
   a. Right click the required stage in the grid.
   b. Select the appropriate ZOH (child order).

NOTE: This step can only be completed prior to the job being in complete status.

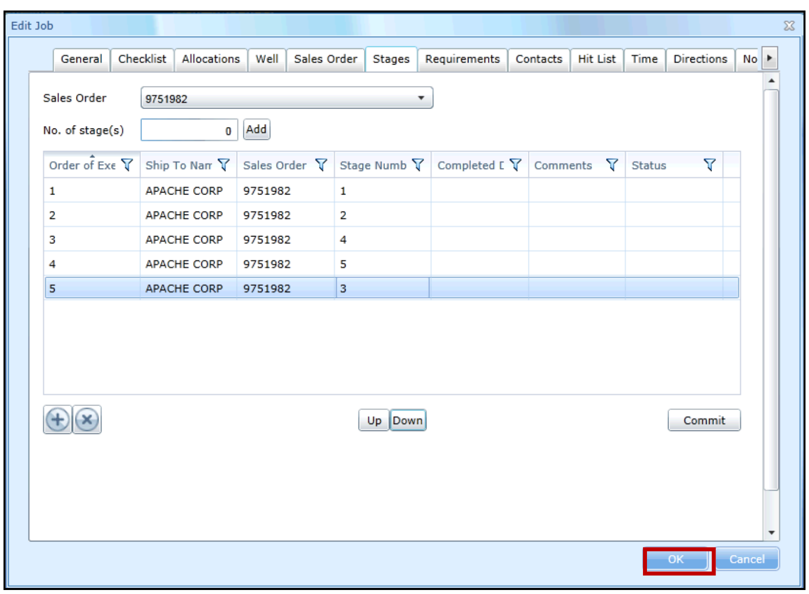


8. Click the **Commit** button at any time to save changes made. A window with a confirmation message displays.



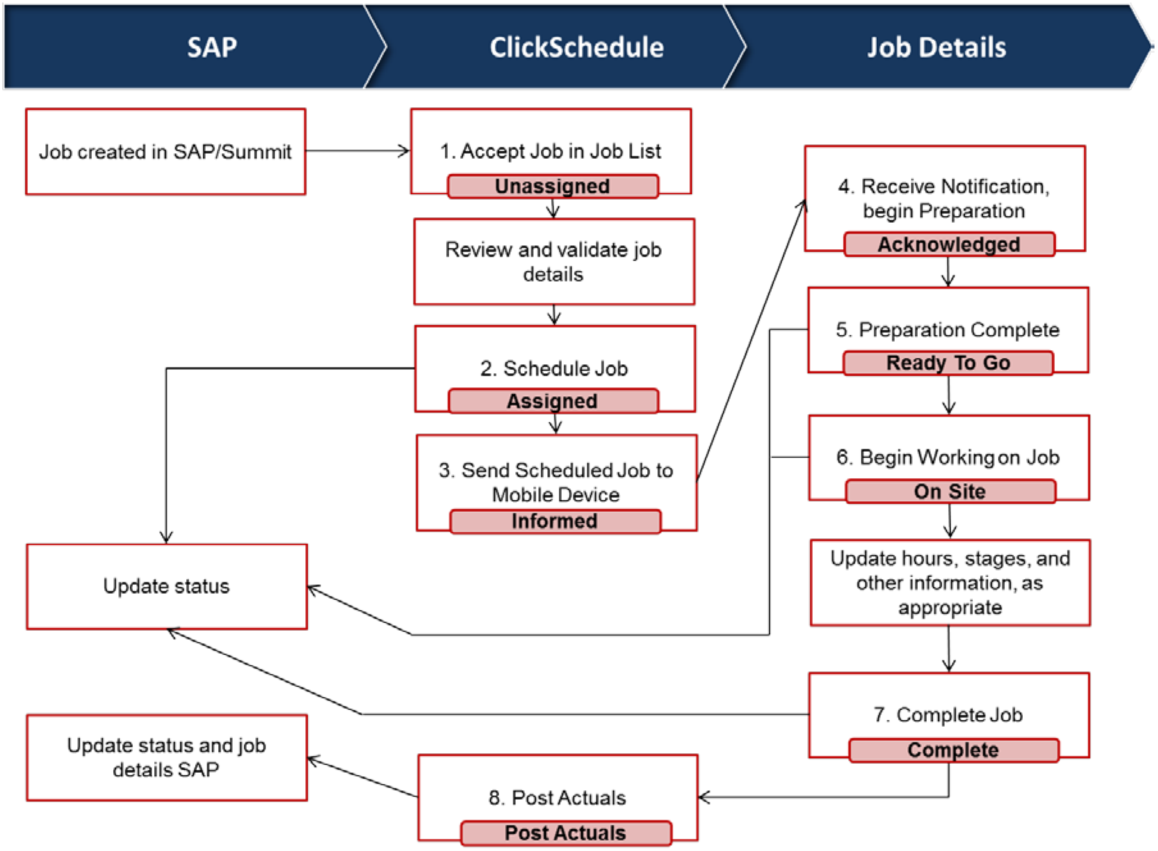


9. Click the **OK** button to return to the **Job List**.



Standard Scheduling Flow and Tasks

The standard scheduling job workflow diagram is shown below:



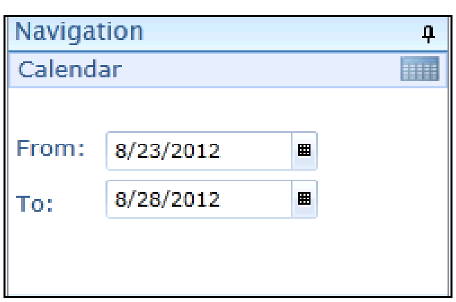
Creating a Job

A job is created in SAP/Summit.

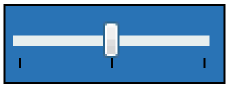
Accepting the Job in the Job List

1. Load the data in ClickSchedule by performing the following steps:

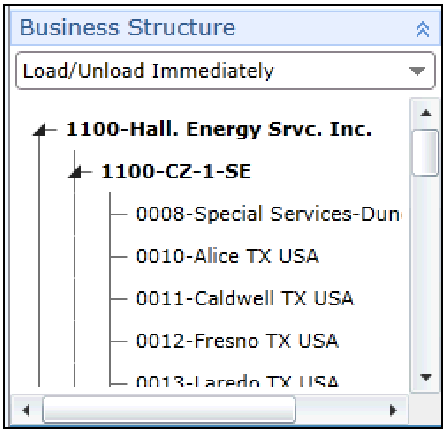
   a. Select the required dates in the **Calendar** pane.



b. Adjust the **Gantt zoom in/out** bar as required.

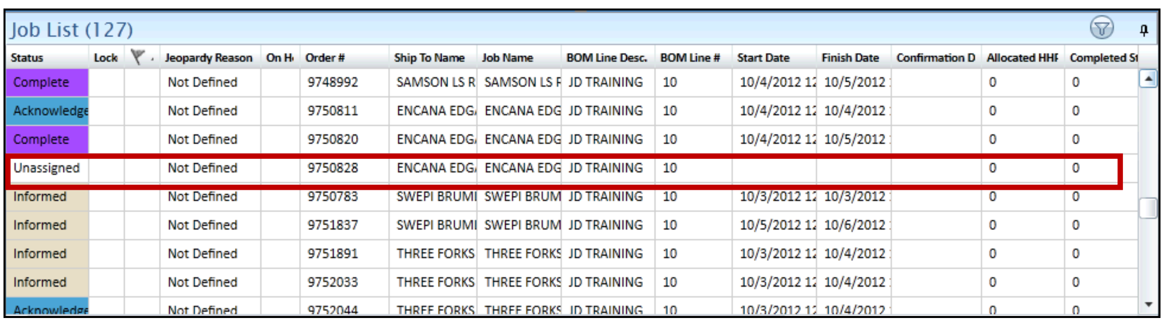


c. Select the required business structure under the **Business Structure** pane.



2. Find the required job in the **Job List**.

The status of the job at this step is **Unassigned**.



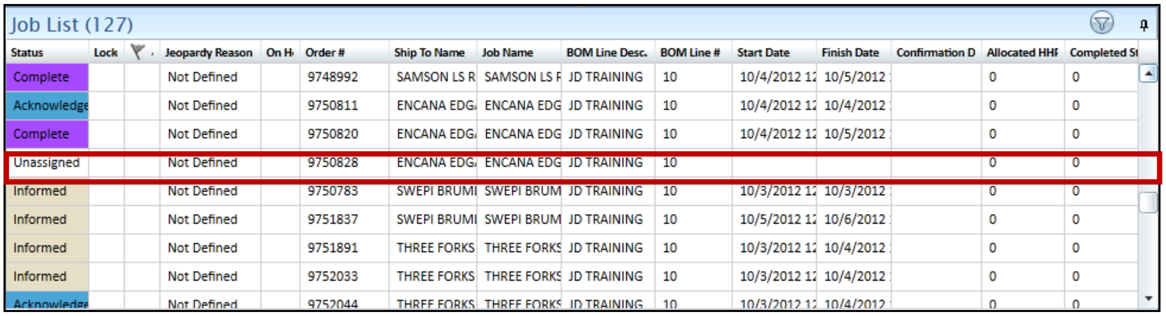
Job List (127)

Status	Lock		Jeopardy Reason	On H	Order #	Ship To Name	Job Name	BOM Line Desc.	BOM Line #	Start Date	Finish Date	Confirmation D	Allocated HHF	Completed St
Complete			Not Defined		9748992	SAMSON LS R	SAMSON LS F	JD TRAINING	10	10/4/2012 12	10/5/2012		0	0
Acknowledge			Not Defined		9750811	ENCANA EDG	ENCANA EDG	JD TRAINING	10	10/4/2012 12	10/4/2012		0	0
Complete			Not Defined		9750820	ENCANA EDG	ENCANA EDG	JD TRAINING	10	10/4/2012 12	10/5/2012		0	0
Unassigned			Not Defined		9750828	ENCANA EDG	ENCANA EDG	JD TRAINING	10				0	0
Informed			Not Defined		9750783	SWEPI BRUMI	SWEPI BRUM	JD TRAINING	10	10/3/2012 12	10/3/2012		0	0
Informed			Not Defined		9751837	SWEPI BRUMI	SWEPI BRUM	JD TRAINING	10	10/5/2012 12	10/6/2012		0	0
Informed			Not Defined		9751891	THREE FORKS	THREE FORKS	JD TRAINING	10	10/3/2012 12	10/4/2012		0	0
Informed			Not Defined		9752033	THREE FORKS	THREE FORKS	JD TRAINING	10	10/3/2012 12	10/4/2012		0	0
Acknowledge			Not Defined		9752044	THREE FORKS	THREE FORKS	JD TRAINING	10	10/3/2012 12	10/4/2012		0	0

Reviewing and Validating the Job Details

The Scheduler reviews the job details and updates, if necessary, in ClickSchedule.

Refer to the **Edit Job Form** QRC for your particular PSL for more information.

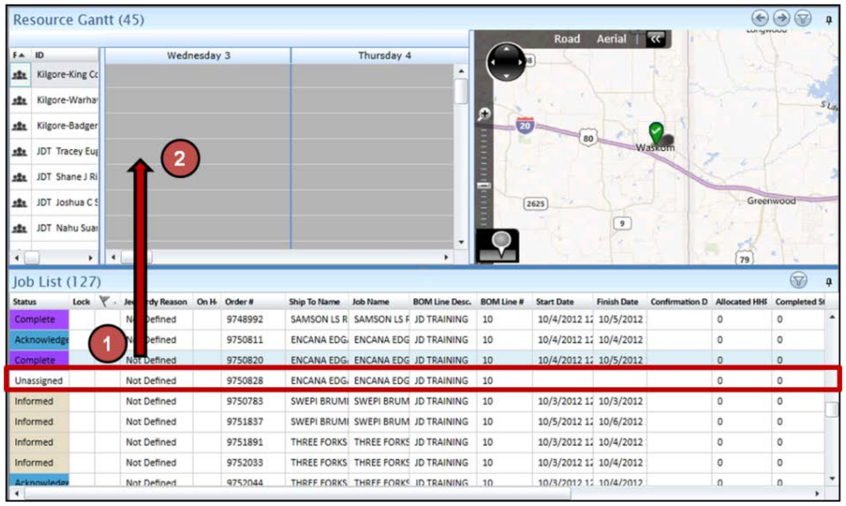


Scheduling the Job

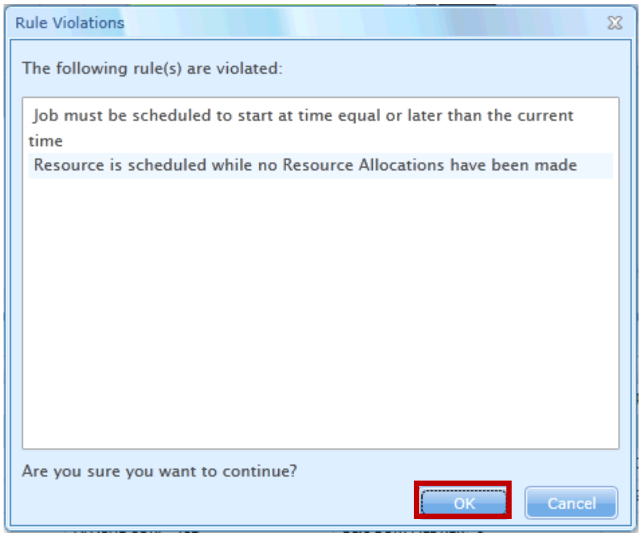
The Scheduler assigns the job to a specific crew, individual, and/or equipment(s) in ClickSchedule.

To assign the job to a specific crew:

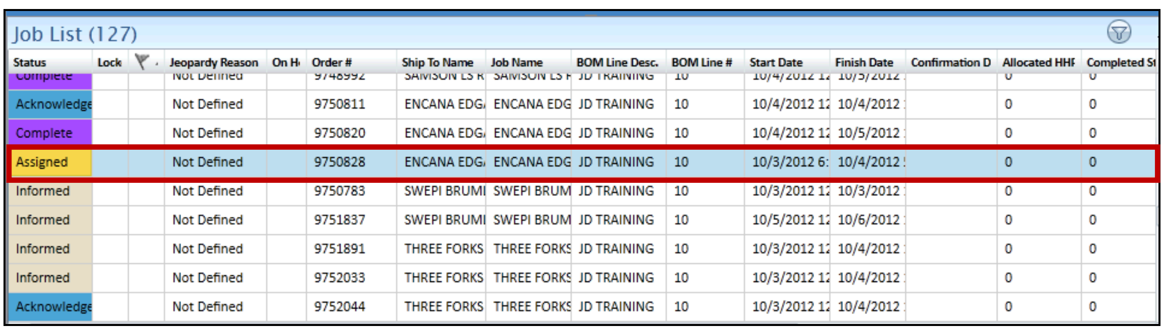
1. Select/highlight the required job from the **Job List**.
2. Drag the selected job onto the required crew, in the **Resource Gantt** chart. The system displays the **Rule Violations** window with violated rule details.



3. Review the rule violations and make updates as necessary. Click **OK** in the **Rule Violations** window to proceed.

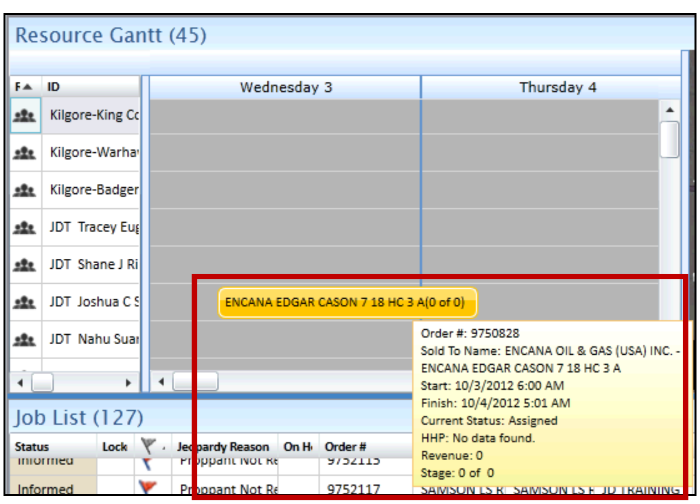


The status of the job at this step is **Assigned**.



Status	Lock		Jeopardy Reason	On H	Order #	Ship To Name	Job Name	BOM Line Desc.	BOM Line #	Start Date	Finish Date	Confirmation D	Allocated HHP	Completed St
Acknowledge			Not Defined		9750811	ENCANA EDG	ENCANA EDG	JD TRAINING	10	10/4/2012 12	10/4/2012		0	0
Complete			Not Defined		9750820	ENCANA EDG	ENCANA EDG	JD TRAINING	10	10/4/2012 12	10/5/2012		0	0
Assigned			Not Defined		9750828	ENCANA EDG	ENCANA EDG	JD TRAINING	10	10/3/2012 6:	10/4/2012		0	0
Informed			Not Defined		9750783	SWEPI BRUM	SWEPI BRUM	JD TRAINING	10	10/3/2012 12	10/3/2012		0	0
Informed			Not Defined		9751837	SWEPI BRUM	SWEPI BRUM	JD TRAINING	10	10/5/2012 12	10/6/2012		0	0
Informed			Not Defined		9751891	THREE FORKS	THREE FORKS	JD TRAINING	10	10/3/2012 12	10/4/2012		0	0
Informed			Not Defined		9752033	THREE FORKS	THREE FORKS	JD TRAINING	10	10/3/2012 12	10/4/2012		0	0
Acknowledge			Not Defined		9752044	THREE FORKS	THREE FORKS	JD TRAINING	10	10/3/2012 12	10/4/2012		0	0

After the job is scheduled, hover over the job bar in the **Resource Gantt** chart to validate the header job details.



Sending the Scheduled Job to a Mobile Device

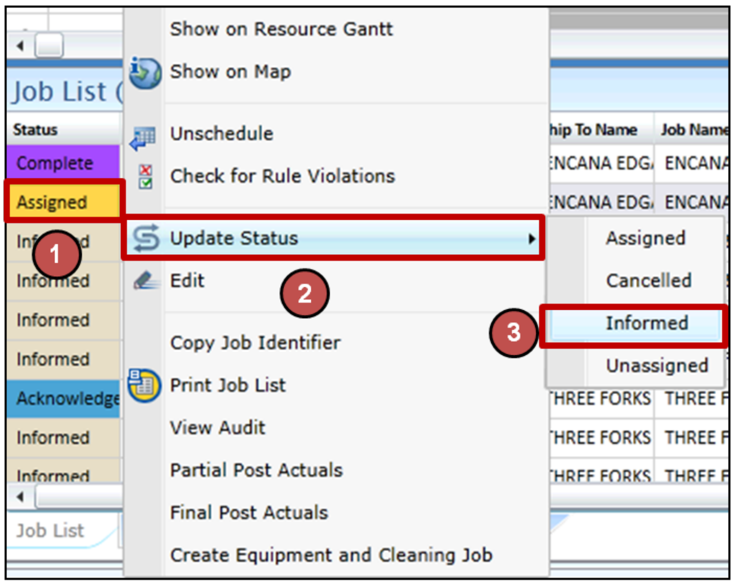
The Scheduler sends the job and assignment information to MLU by changing the job status to **Informed**.

To update the job status in ClickSchedule:

1. Right-click the required job in the **Job List**. A list of options displays.

2. Select the **Update Status** option.

3. Select the **Informed** option.



Receiving Notification and Beginning Preparation

MLU receives and reviews the job information in Job Details. MLU updates the job status to **Acknowledged** and proceeds with any necessary preparations related to the site, equipment, and crew.

Completing Preparation of the Crew

MLU finalizes all preparations for the job and updates the job status to **Ready To Go** in Job Details.

Beginning Work on the Job

MLU confirms that the crew has reached the customer site and updates the job status to **Onsite** in Job Details.

Note: The assignment start is locked now and cannot be updated.

Updating Stages, Exposure Hours, etc.

MLU updates job specifics, as appropriate, throughout the process.

Completing the Job in Job Details

MLU confirms that the crew has completed the work on site and has initiated close out process.

- All technical or pumping work is complete, but there may still be equipment or resources onsite
- Crew or field resource is ready to leave the site.

MLU captures the job details, if relevant (for example, well data) and updates the job status to **Complete** in Job Details.

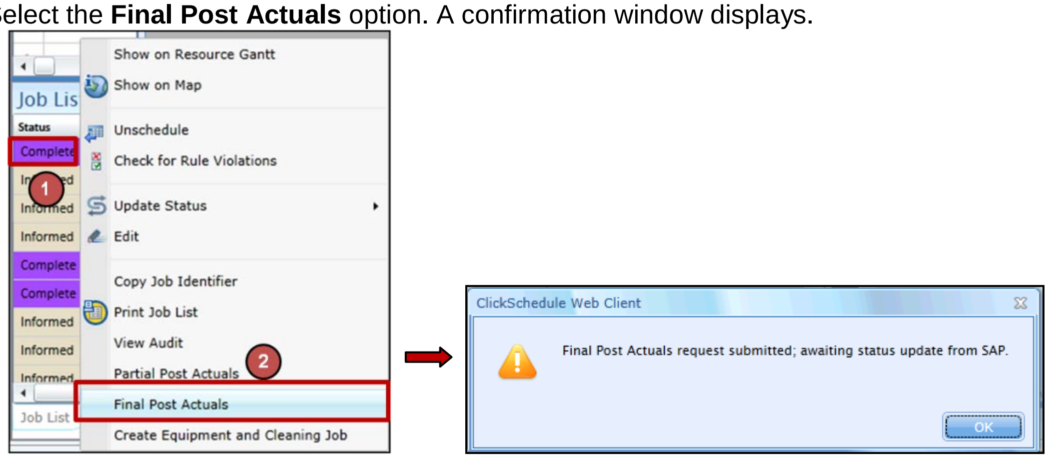
Posting Actuals in ClickSchedule

MLU confirms that the crew has arrived to the yard.

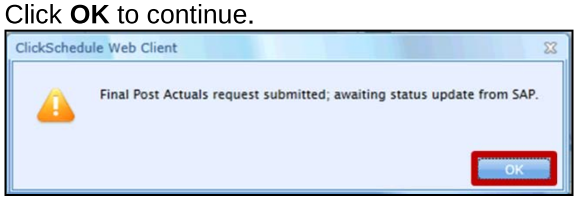
The Scheduler verifies all exposure hours and equipment use and then performs **Post Actuals**.

To perform **Post Actuals** in ClickSchedule:

1. Right-click the job in the **Job List**. A list of options displays.
2. Select the **Final Post Actuals** option. A confirmation window displays.



3. Click **OK** to continue.

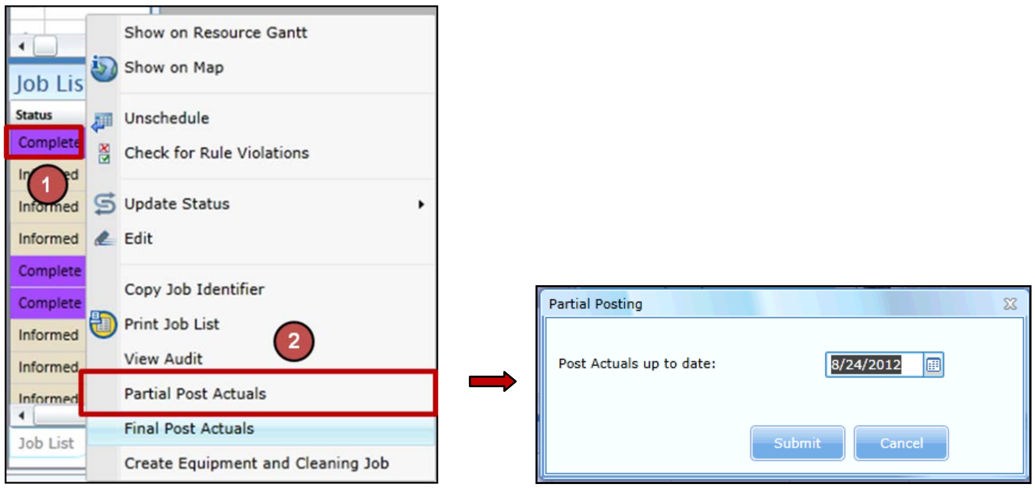


Note: Schedulers might need to perform Partial Posting based on the customer or job requirements. Schedulers review Schedule Job Log records and then confirm and submit partial posting.

To perform **Partial Post Actuals** in ClickSchedule:

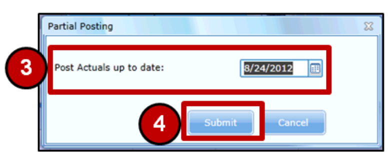
1. Right-click the job in **Job List**. A list of options displays.

2. Select the **Partial Post Actuals** option. The **Partial Posting** window displays.



3. Enter the date up to which partial postings need to be performed in the **Post Actuals up to date:** field.

4. Click the **Submit** button.



Updating the Job Status and Job Details in SAP

The job status is automatically set in SAP after all the exposure hours have been accepted by SAP.

The **Post Actuals** status in ClickSchedule maps to the **Complete** status in SAP.

Tool Bar – Scheduling View

The **Tool** bar facilitates navigation within ClickSchedule and provides easy access to key functionality.

The **Tool bar** includes the following buttons:

6.  **Unschedule Job(s)**: Enables unscheduling of a job

7.  **Check Rule Violations**: Lists any scheduling rules that have been violated by the currently scheduled job in the **Rules Violations** dialog box

8. 

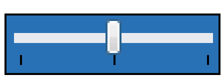
Select Business Policy: Enables the user to select the scheduling policy (rule set) to be applied to the schedule

9.  **Save Job List**: Enables the user to save the **Job List** as an HTML document

10.  **Print Job List**: Sends the **Job List** to the printer

11.  **Preview Job List**: Displays a preview of the **Job List** as it will appear in a print out

12.  **Show/Hide Time Interval**: Displays the time interval slider on the map

13.  **Gantt zoom in/out**: Enables the user to set the block of time (for example, week, month, or 3 months) for what data is displayed in the Scheduling view. Depending on the position of the **Select zoom level** button, the data is displayed by the hour, day, or week in the **Scheduling** view

14.  **Refresh**: Refreshes the on-screen display of data

15.  **Search**: Opens a search box at the top of the screen so that the user can search for needed information

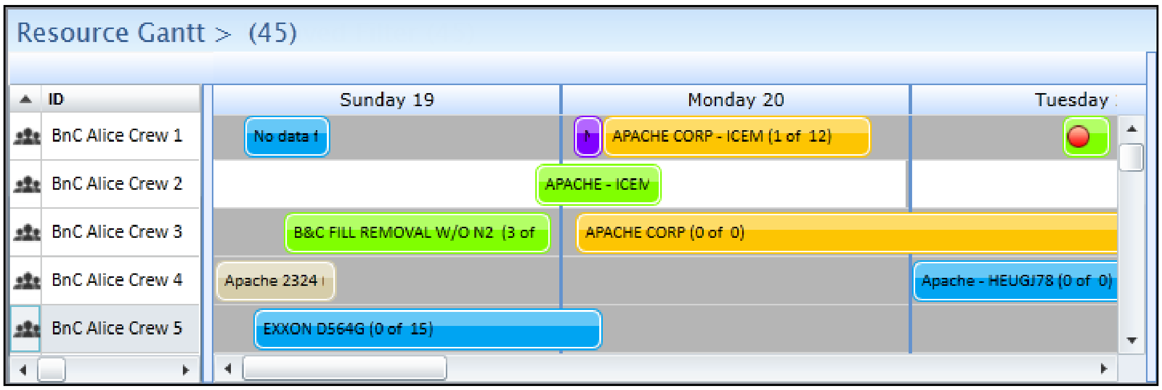
16.  **Help**: Opens a web page where the user can access online application help for ClickSchedule

17.  **About ClickSchedule**: Displays the software version information

Using the Resource Gantt Chart

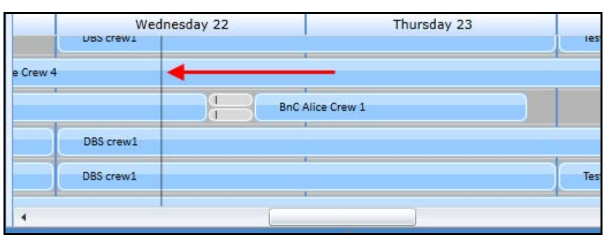
The **Resource Gantt** chart provides a graphical representation of the schedule details. By default, only the crews for the selected calendar dates and business structure selection are initially shown.

See information later in this document about loading additional resources into the **Gantt** chart.

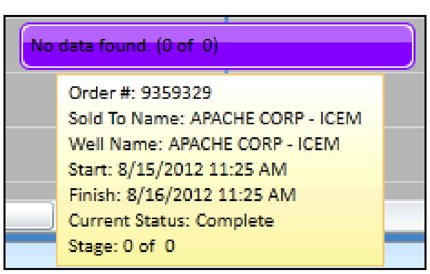


Some of the features of the **Resource Gantt** chart are:

- Each scheduled job on the **Resource Gantt** chart appears as an assignment bar.
- The total number of loaded resources is indicated in the **Resource Gantt** chart header (for example ).
- The current time is indicated on the **Resource Gantt** chart by a vertical line as shown below.

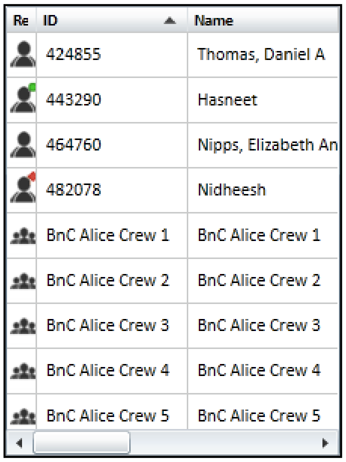


- The job label, job bar color, job bar icon, and job tool tip are displayed for each job on the **Resource Gantt** chart.



Note: Hover your mouse over a job to display the job tool tip.

- The **Resources List** appears on the left side of the **Resource Gantt** chart, listing all of the resources that are currently loaded.



Re	ID	Name
	424855	Thomas, Daniel A
	443290	Hasneet
	464760	Nipps, Elizabeth An
	482078	Nidheesh
	BnC Alice Crew 1	BnC Alice Crew 1
	BnC Alice Crew 2	BnC Alice Crew 2
	BnC Alice Crew 3	BnC Alice Crew 3
	BnC Alice Crew 4	BnC Alice Crew 4
	BnC Alice Crew 5	BnC Alice Crew 5

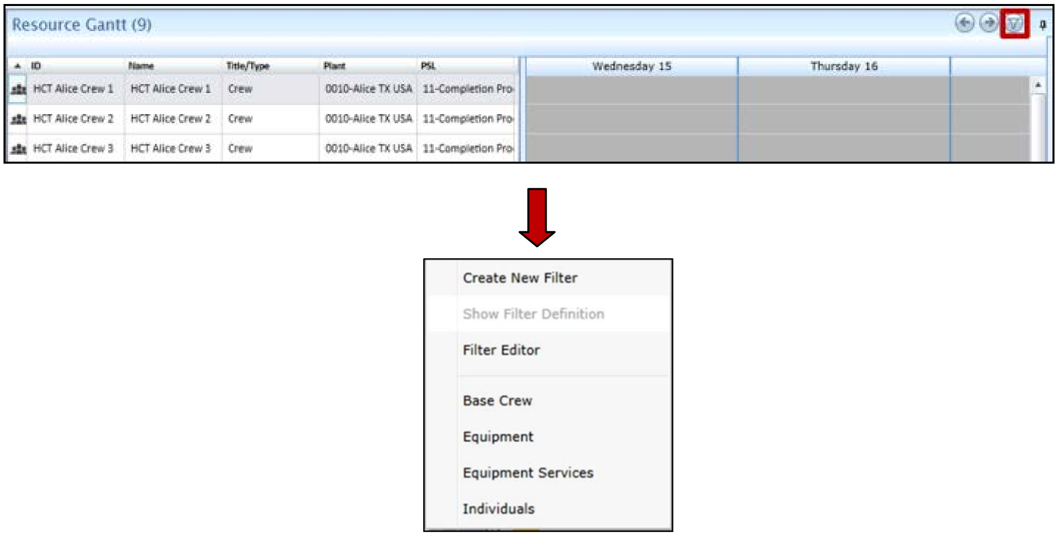
Note: For icon explanations, please see the **Legend** QRC.

The following actions can be performed on the **Resource Gantt** chart:

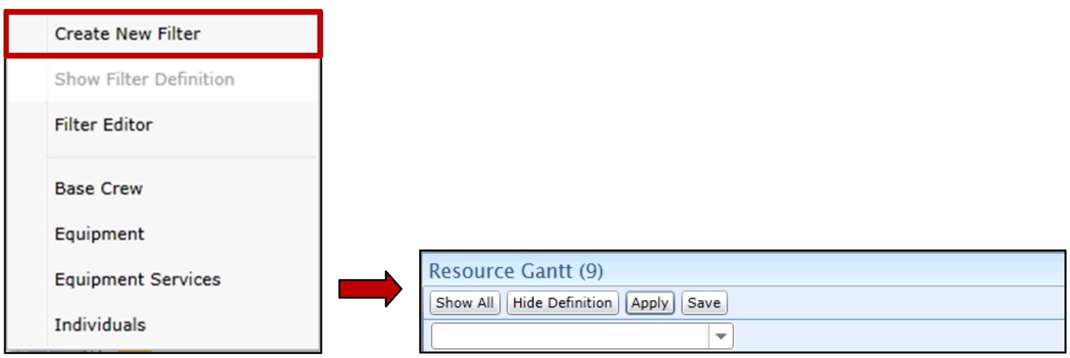
- All the resources (crews, individuals, and equipment) can be displayed together in the **Resources List** using the filters option
- Crews can be created using the **Create Crew/Unit** option
- Resources can be allocated to various crews using the **Create Crew Allocation** option
- Scheduled jobs can be filtered based on various criteria
- Current jobs can be reviewed, modified, and unscheduled
- Non-availability periods can be added, modified, and deleted
- Resources' calendars can be changed using the **Change Calendar** option

To display all the resources in the **Resource Gantt** chart:

1. In the **Scheduling** view, click the **Filter Operations**  button located on the top-right corner of the **Resource Gantt** chart. A list of options displays.

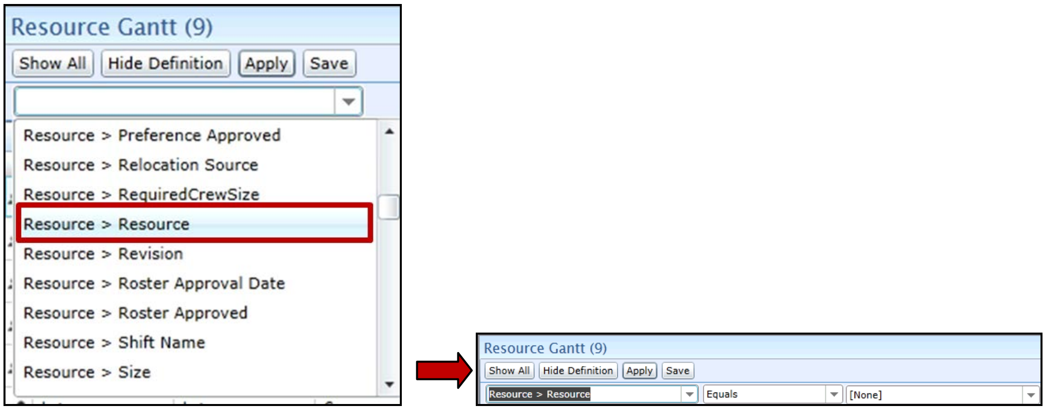


2. Select the **Create New Filter** option. The filter area displays below the **Resource Gantt** header.

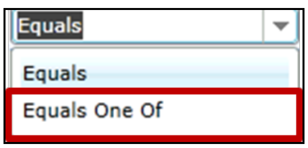


3. Define the filter criterion as follows:

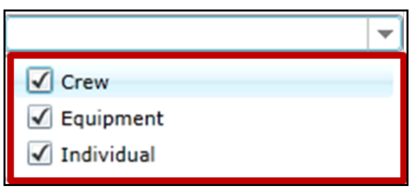
   a. Select the **Resource > Resource** option from the drop-down list. Two new drop-down lists display.



   b. Select the **Equals One Of** option from the middle drop-down list.

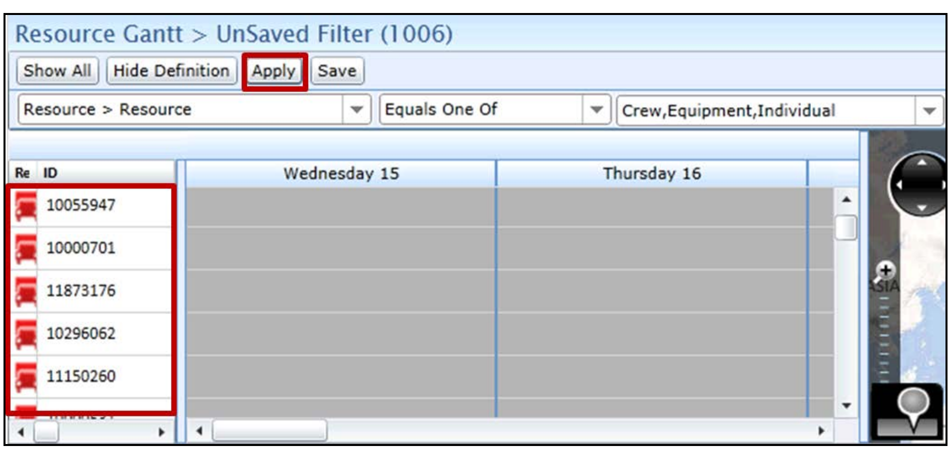


   c. In the third drop-down list, select the checkbox for the type of resource that needs to be displayed in the **Resource List** on the **Resource Gantt** chart.



Note: You can select one checkbox or any combination of checkboxes.

4. Click the **Apply** button. All the required resources display in the **Resource List**.



Working with Maps

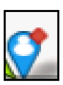
The **Resource Gantt** panel includes the **Map**, which enables you to view the distribution of resources on the map in real time. The **Map** pinpoints resources (individuals and equipment), customers, jobs and well locations. The **Map** can display a maximum of 40 resources. The **Map** view displays scheduled jobs for a maximum of 24 hours starting from the current time.

Map and Icons:

Each resource/job location is indicated using the icons on the map. The map icons include:

 - Job  - Crew, Completed Job  - In Jepordy Job

 - Resources' Home Base  - Individual Connected to Job Details (**JD**)

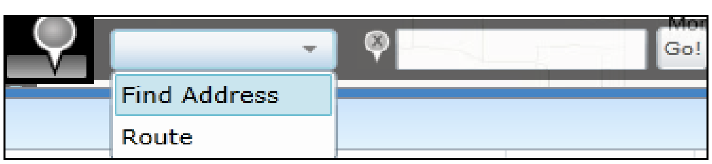
 - Individual Not Connected to JD

Map Tools:

1 Use the Zoom Bar to expand or collapse the **Map** viewing area.

2 Use the Panning Icon  to pan across the **Map**.

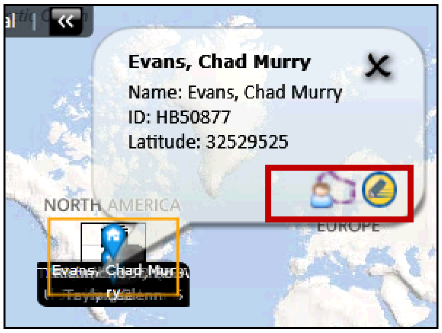
3 To locate an address or a route, use the find and search feature of the **Map**.



To hide find and search feature, click  to collapse the search fields.

Resource Details:

When the resource/job icon is clicked, the corresponding resource details are displayed in a pop-up balloon on the map.



The pop-up balloon also has:

- **Draw Route** icon: Used to draw a route map between two or more resources/jobs
- **Edit Resource** icon: Used for editing the properties of a resource/job

Resource Connectivity:

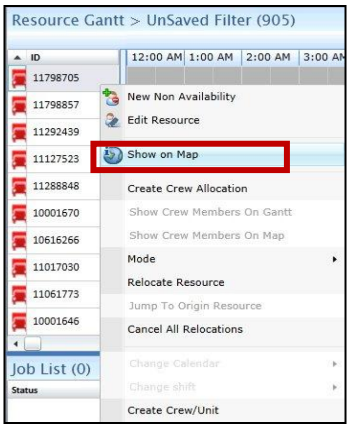
You can also find out the connectivity status of the resource/job using the map. The connectivity status of a resource is indicated as follows:

- A green circle on the resource icon indicates that the resource is connected to Job Details (**JD**) via a mobile device.
- A red mark on the icon indicates that the resource is not connected to JD.

View Resources and Jobs on Map:

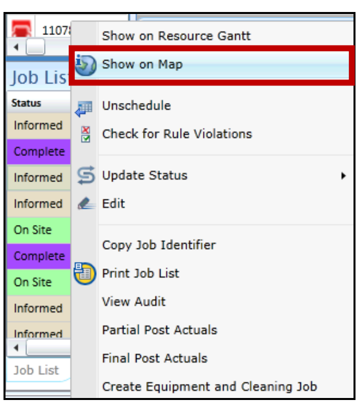
To view the location of a resource on the map:

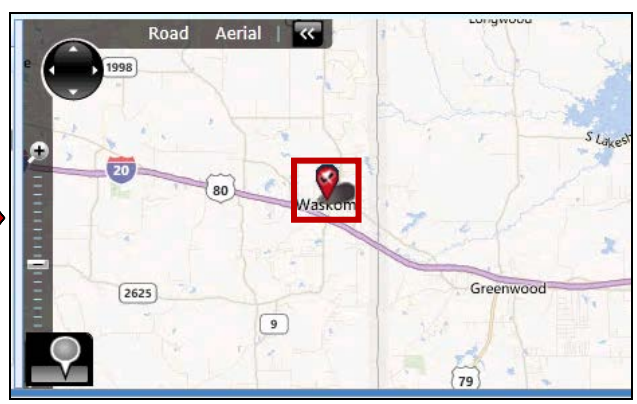
1. Right-click on the resource in the **Resources List**. A list of options is displayed.
2. Select the **Show on Map** option.
3. The location of the selected resource is displayed on the map.



To view the location of a job on the map:

1. Right-click the job in the **Job List** (or right click Job in Gantt). A list of options is displayed.
2. Select the **Show on Map** option.
3. The location of the selected job is displayed on the **Map**.

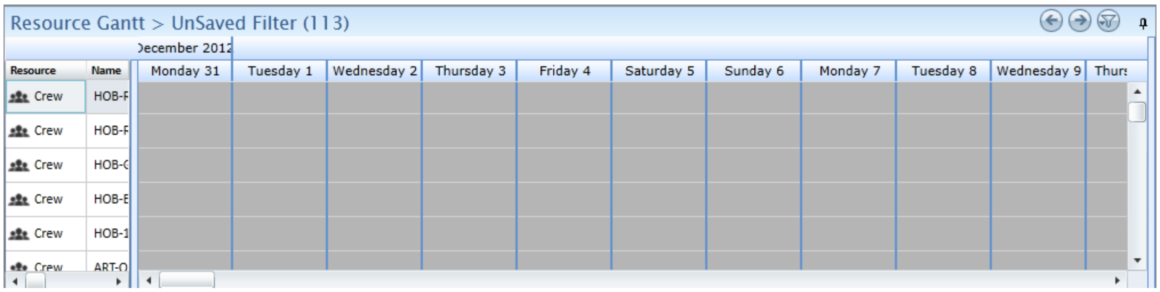




Hiding the Map View from the Resource Gantt:

To hide the map view from the Resource Gantt

1. Hover the cursor between the Resource Gantt and the **Map.**
2. A white double sided arrow appears.
3. Click and drag the **Map** view to the right until it is no longer displayed.



Bringing the Map View back to the Resource Gantt:

1. Hover the cursor at the end of the Resource Gantt view.
2. A white double sided arrow appears.
3. Click and drag the **Map** view to a position on the Resource Gantt.
4. The **Map** is now displayed on the Resource Gantt.