eService Quick Reference Guide for Version 3.3.0.0 (USA)

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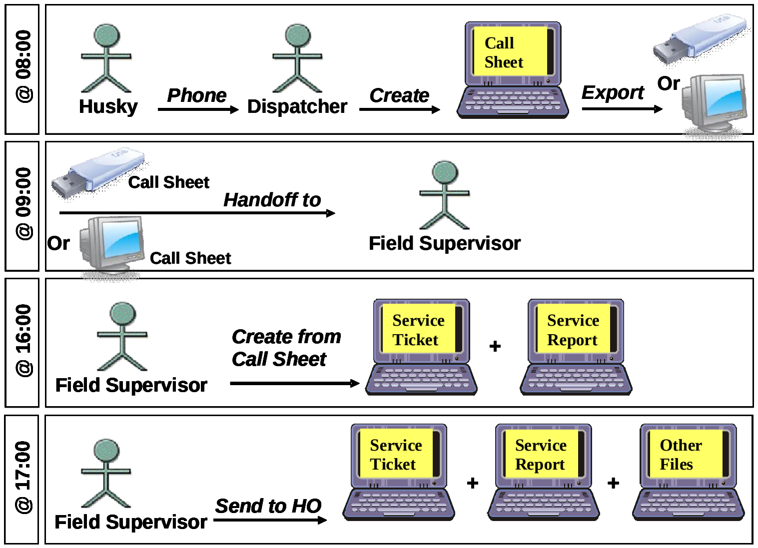
eService Quick Reference Guide

What is eService?

eService is a client and server application that facilitates the electronic reporting and tracking of information starting from the initial notification of the job through to the invoicing process after job completion. The goal of the eService system is to improve the process used by Sanjel Corporation and Sanjel (USA) Inc. to generate and track all artifacts related to a job by getting the job's data to Head Office in a timely and accurate manner. The system will provide the software needed to electronically send and receive job artifacts between the Districts and Head Office.

The eService Process



Essential Knowledge about eService

Call Sheet Status

Ready – A call sheet that has been saved and has met all the mandatory input field requirements. A "Ready" call sheet may be exported to an external storage device.

In-progress – A call sheet that has been saved but has **not** met all the mandatory input field requirements. These call sheets must be completed before attaining "Ready" status.

Locked – A call sheet that has been exported to an external storage device. Once a call sheet is "Locked" it can't be modified.

Job Package Status

Empty – If a service ticket or service report hasn't been added to the job package, it will display an "Empty" status.

In-progress – A service ticket or service report that has been saved and has **not** met all mandatory input field requirements will have an "In-progress" status which will also apply to the job package.

Ready – A service ticket or service report that has been saved and has met all mandatory input field requirements will have a "Ready" status. If both service ticket and service report have "Ready" statuses, the job package will also have the same status.

In-route – Applies when a “Send” has been requested, but confirmation of receipt hasn’t been received.

Transmitted – Applies when a “Send” has been requested and confirmation of receipt has been received.

Red Asterisk and Carat

Red Asterisk (*) – A red asterisk indicates the application won’t allow you to proceed to the next input window until a value has been entered. If any of these fields are empty, the user is prompted to complete them before advancing to the next window.

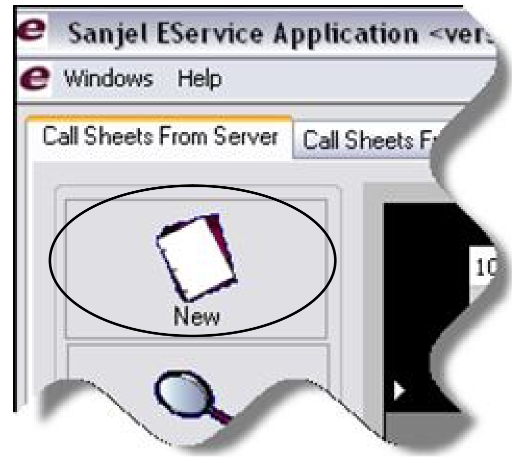
Red Carat (^) – A red carat indicates that the input field is required to complete the eService Report, but it will be allowed to be saved for completion at a later time. If it isn’t filled in, the user is notified of this condition.

Selecting Business Unit

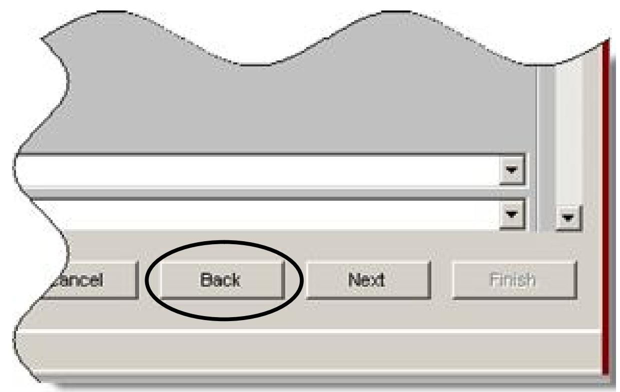
eService allows you to create call sheets and job packages either for the USA or Canadian Business unit. As a US user, your computer’s default setting is Sanjel USA. If you are asked to create a call sheet or job package for the Sanjel Canada Business, you will need to change the setting in the application. To change the setting:

For Dispatchers

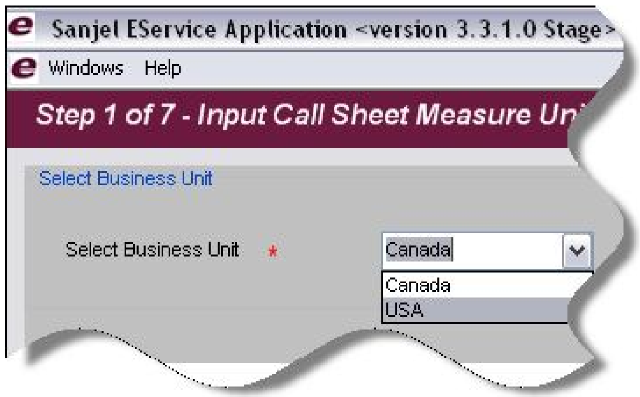
1. Press the **New** button on the **Call Sheet** main window to create a new call sheet. This opens up the **Input Call Sheet Header Information** window.



2. Before going any further, press the **Back** button at the bottom right corner of the window. This brings up the **Input Call Sheet Measure Unit Type** window.



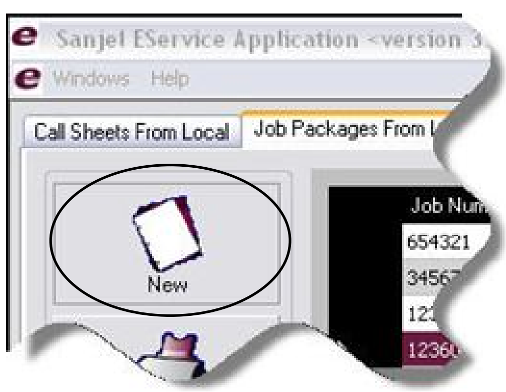
3. Select the business unit that is required for this call sheet.



4. Press the **Next** button  at the bottom right corner of the window.

For Field Supervisors

1. Press the **New** button on the **Job Package From Local** window to create a new job package. This opens up the **Select Local Call Sheet** window.



2. Repeat step 2 through step 4 listed above.

NOTE: This doesn't re-set the setting permanently—users will need to do this step every time when creating a call sheet or job package for a business unit that is not their default business unit.

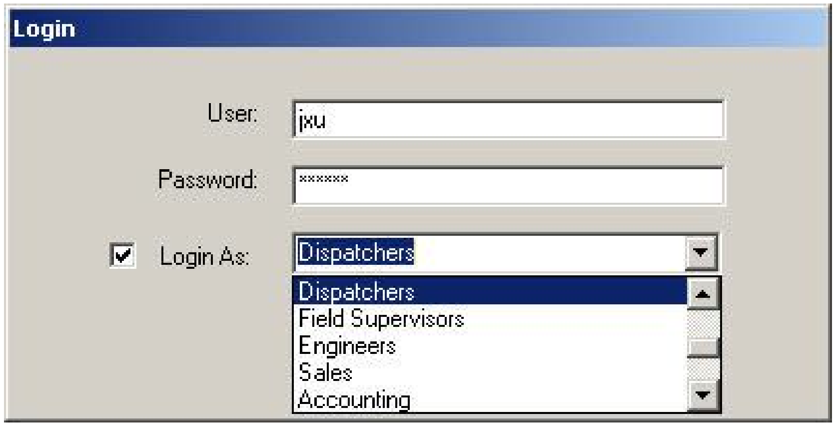
To Start eService

- To start eService, click on the eService shortcut icon on the desktop, or
- Use the Windows Start Menu. Go to **Programs** and then "Sanjel Corporation Applications".

To Log in

- Log on is based on the job role you are performing (dispatcher, field supervisor, etc.).
- Always select the job role that you are logging in for.

- Specific job role login is restricted to those employees pre-authorized to perform those job roles.



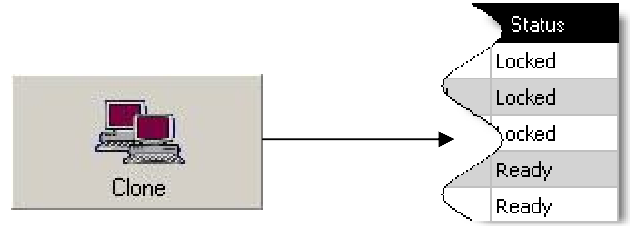
Procedures for Dispatchers

To Create a New Call Sheet

There are two ways of creating a call sheet:

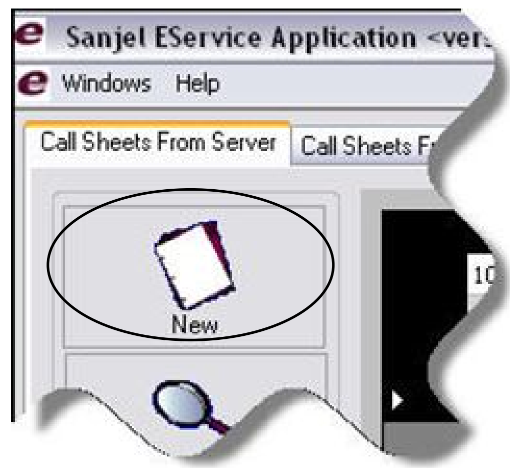
- Use the **New** button  to start a completely new call sheet, or
- Use the **Clone** button to start a new call sheet based upon a previous one.

NOTE: Call sheets can only be cloned from existing call sheets having the "Locked" status.



To Create a New Call Sheet from Scratch

1. Start eService and log in as a dispatcher.
2. Press the **New** button at the top left corner of the **Call Sheet** main window.



3. Select the correct **Call Sheet Service Line Type**.
4. Select **Yes** if the job has multiple service reports submitted via eService. Select **No** if not. Select the lead service line if you have selected **Yes.**

TIP: When to Select **Yes** or **No** to “Will this Job have Multiple Service Reports Submitted via eService?”

There might be two service lines on location for a job, if both service lines are completing a service report, then select **Yes**. But if only one of the service lines is completing a service report, then select **No**.

5. Enter the consultants’ names, phone numbers, and emails.

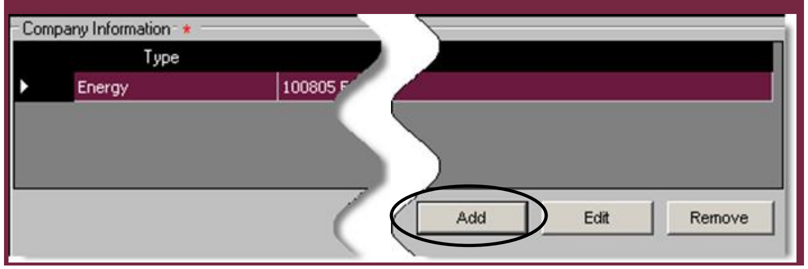
TIP: What to enter for **Alert By 1 & 2 (Consultants)**?

Enter the names of the consultants who first contacted the dispatcher with the job information. Consultant 1 will be the main person who will be transferred to the **Call Out** consultant information.

6. Add company information as given on the front page of the job program.

TIP: How to fill tables in eService?

In the process of creating documents using eService, you will be asked to fill some tables. A table in eService usually consists of a grid area and three buttons at the bottom right corner of the grid. The following shows the **Company Information** table as an example.



To fill the table:

1. Press the **Add** button. The input area appears.

2. Enter the required information in the input area.
3. Press the **Update** button once you are done. The new information then appears in the grid area.

The table configuration is slightly different from table to table, but overall, the procedures of filling the tables are very similar.

7. Enter the **Well Information**. Press the **Next** button  at the bottom right corner of the window.
8. Add all the **Billing Information** as given on the back page of the job program.
9. Enter all the job data as given in the job program.
10. Enter the **Hole Conditions** information that is available.
11. Enter the wellbore fluids information that is available.
12. Press the **Next** button .
13. On the **Input Call Sheet Header Well Hardware** window, select the type of treatment that will be pumped down.
14. Select the type of wellhead connection if the information is available.

15. Put as much information as you can on the rest of the **Input Call Sheet Header Well Hardware** window. Or you can attach an electronic file from the client providing the data.
16. Press the **Next** button 

.
17. Enter the gas/fluid requirements information if applicable.
18. Enter all the safety information and unexpected hazards into the boxes provided.
19. Enter any other job information to the **Comments** box.
20. Press the **Next** button 

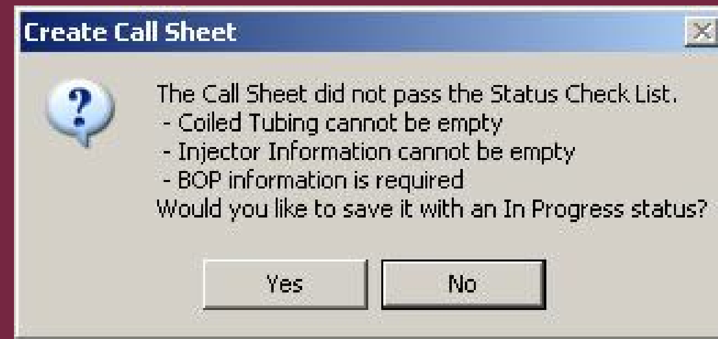
.
21. Enter the service line section information as much as you can. For pumping services, there are two mandatory fields to fill.
22. Press the **Next** button 

.
23. Press the tabs on the top of the window in turn and fill the information as much as you can. For coiled tubing service, there are two mandatory fields to fill under the **Well Control** tab 

.
24. Press the **Finish** button 

.

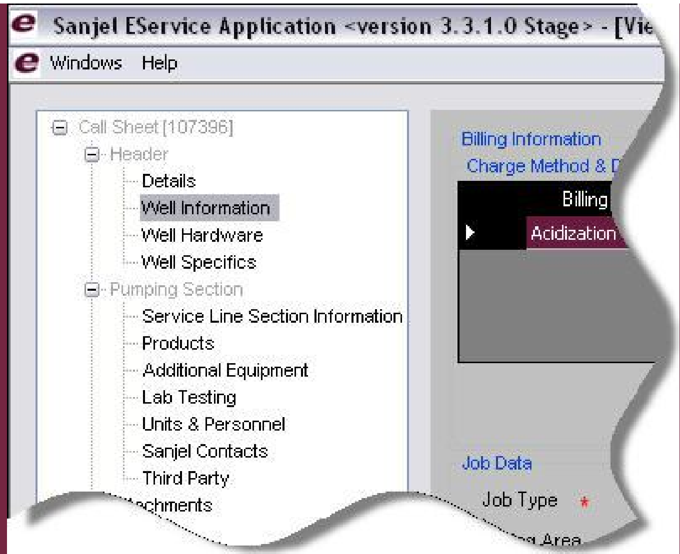
TIP: What if the call sheet didn't pass the status check list?



If you get a notification box telling you that your call sheet didn't pass the status check list after you pressed the **Finish** button, that indicates there are some input fields with a red carat still empty. Press the **Yes** button on the box to continue. Note the call sheet number showing on the pop-up window and then press the **OK** button.

To locate and finish these unfilled fields:

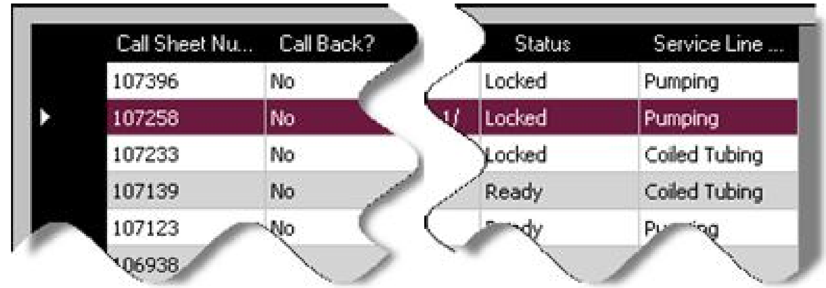
1. Go to the **Call Sheet** main screen and find the call sheet in the **Call Sheet List Panel**. If you can't find the call sheet in the panel, then use the **Search** feature.
2. Double click the call sheet in the **Call Sheet List Panel.** This brings up the call sheet **Tree View** window.



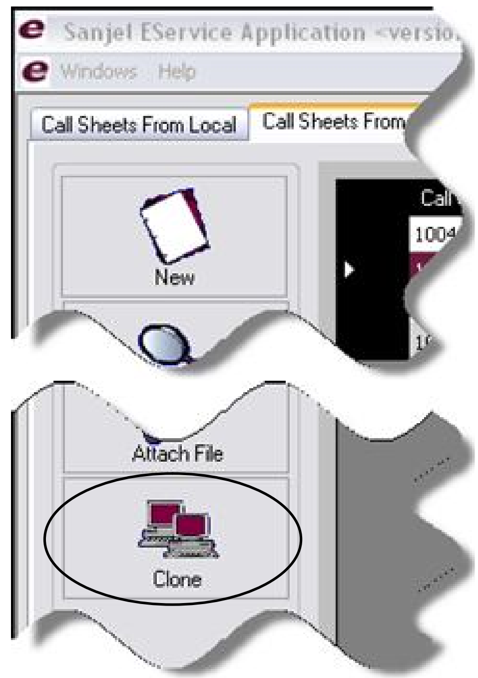
3. Locate the title that is pertinent to the unfilled fields in the **Tree View** and double click the title to open up the fields.
4. Enter the required information in the mandatory fields.

To Create a New Call Sheet by Cloning an Existing Call Sheet

1. Select the call sheet that you will clone in the **Call Sheet List Panel**.



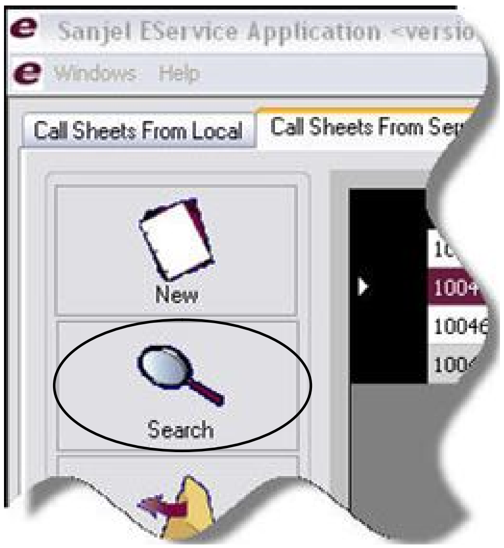
2. Press the **Clone** button on the **Call Sheet** main window. This opens up the call sheet that you have selected.

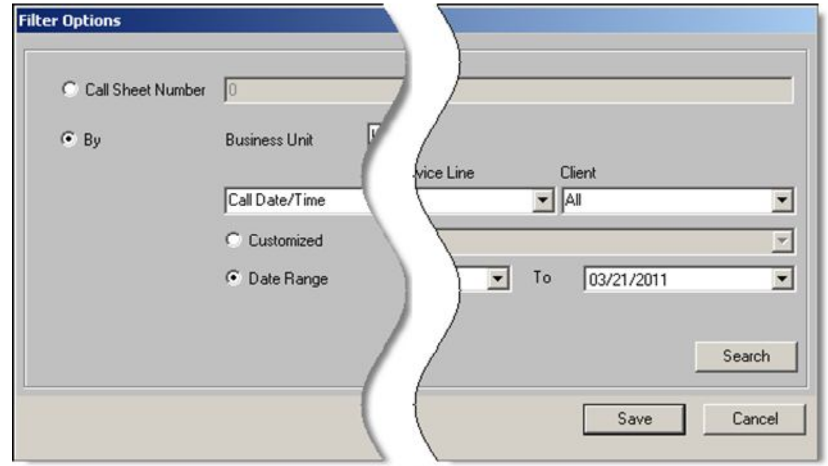


3. Review each section of the call sheet and edit appropriately to ensure the correct data is present.

To Search the Existing Call Sheets

1. Press the **Search** button on the Call Sheet main window. This brings up the **Filter Options** window which allows you to select and customize the search options.

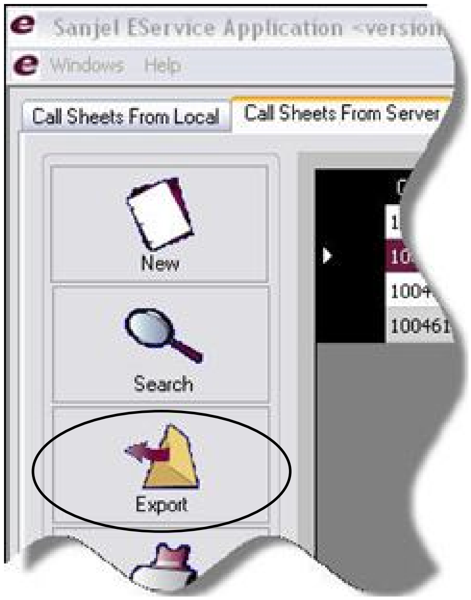




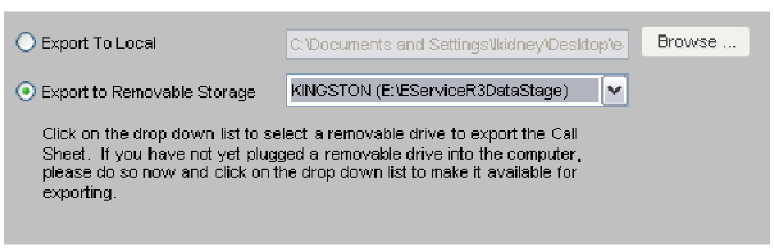
2. Choose which option is to be set by selecting either the **Call Sheet Number** or **By** radio button.
3. Enter a specific call sheet number if you have selected the **Call Sheet Number** button. Set the search criteria if you have selected the **By** radio button.
4. Optionally save this search criteria using the **Save** button Save. If the search criteria are saved, it will be available for the next login. If not, the previous search criteria will still be in effect.

To Export the Call Sheet

1. Press the **Export** button on the **Call Sheets** main window.



2. Select the **Export to Local** radio button if you are going to save the call sheet onto the local drive of your computer. Select the **Export to Removable Storage** radio button if you are going to save a copy of the call sheet to the USB memory disk. (You must insert the USB memory disk in the USB port as a first step.)

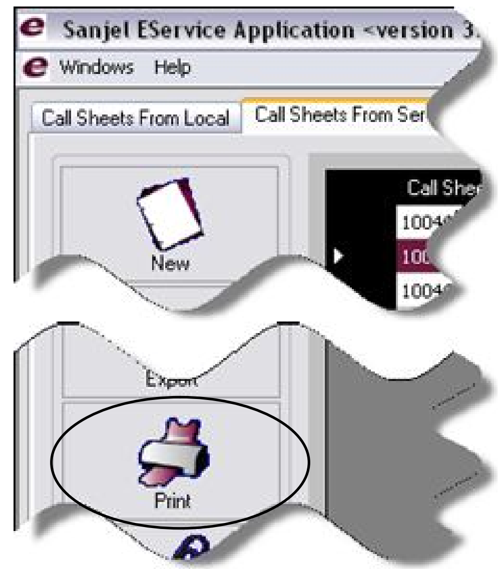


NOTE: Call sheets must be in “Locked” or “Ready” status in order for you to export.

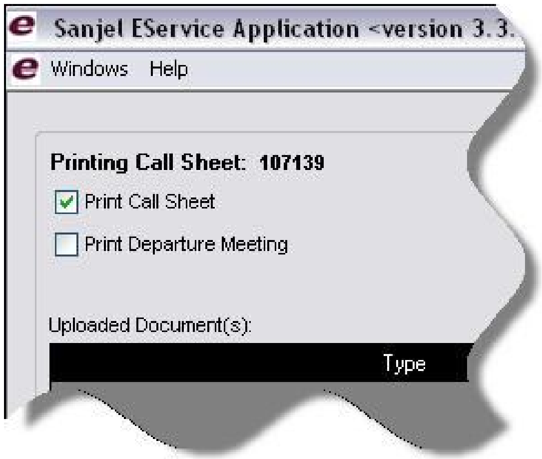
3. Press the **Finish** button .

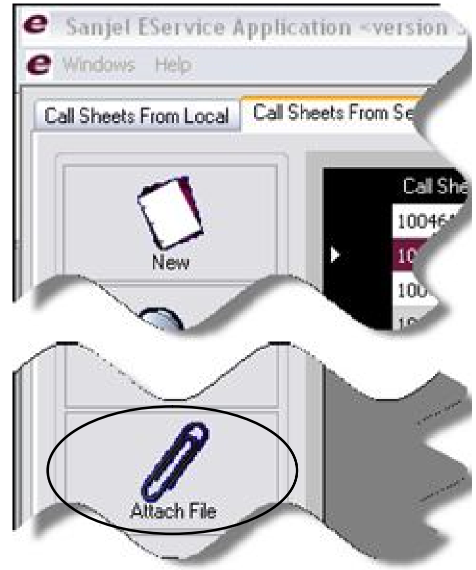
To Print a Call Sheet

1. Press the **Print** button on the **Call Sheet** main window once the call sheet is loaded.



2. Check the **Print Call Sheet** check box to print the call sheet. You can also print the departure meeting sheet by checking the **Print Departure Meeting** check box.



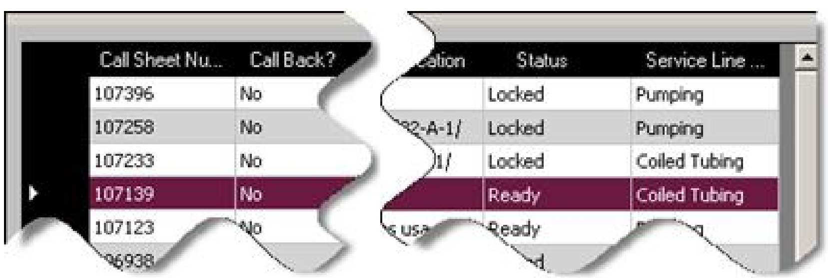


3. Press the **Print** button  at the bottom right corner of the window.

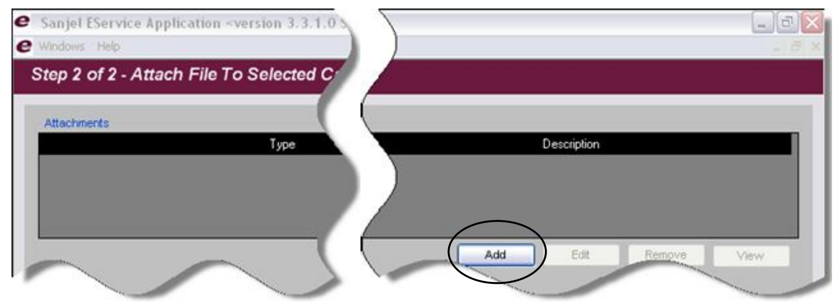
To Attach Files to a Call Sheet

1. Select the call sheet to which the file(s) will be attached and press the **Attach File** button on the **Call Sheet** main window.

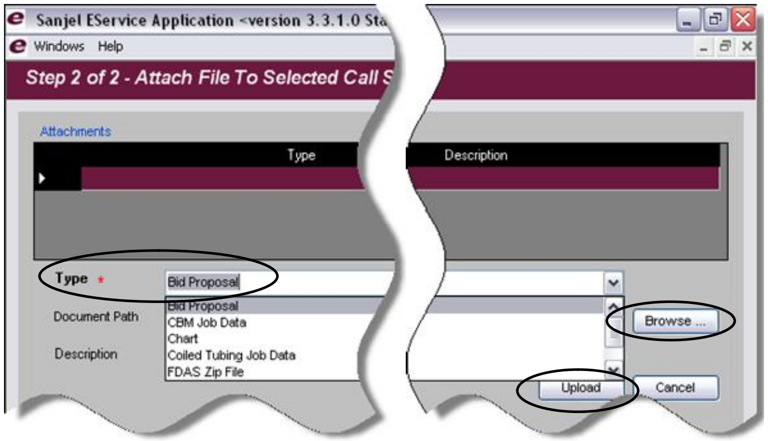
NOTE: Files can't be attached to a call sheet that is in a "Locked" status.



2. Press the **Add** button to open the file selection area.



3. Select the correct file type.



4. Press the **Browse** button to find the file that will be attached.
5. Enter a brief description of the file if applicable and then press the **Upload** button to upload the file.
6. Once the document has been uploaded, press the **Finish** button .

Procedures for Field Supervisors

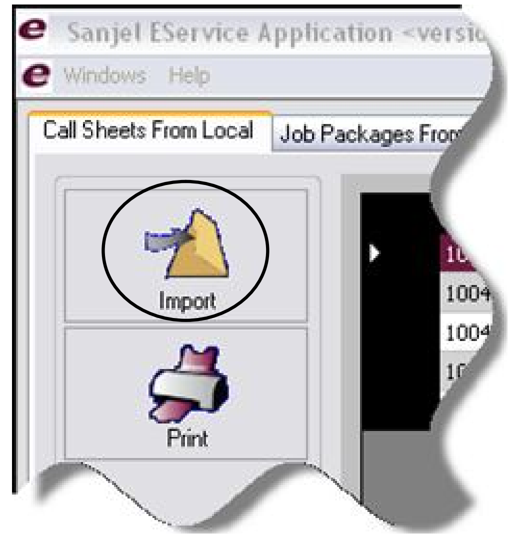
Sanjel E-Service R3

To Save the Call Sheet to Local

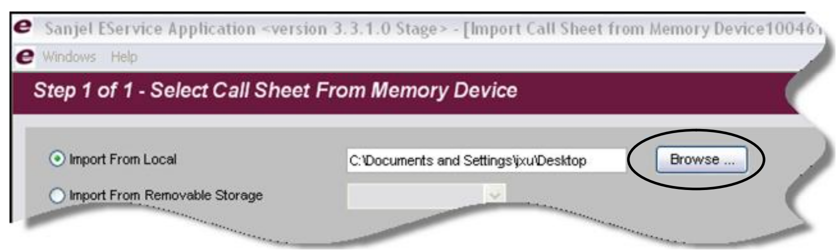
- Save the call sheet from the email sent by the dispatcher to the desktop, or
- Save the call sheet from the USB memory disk to the desktop.

To Import the Call Sheet from Local

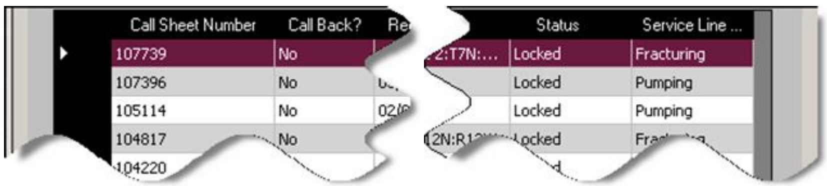
1. Start eService and log in as a field supervisor.
2. Press the **Import** button at the top left corner of the **Call Sheet** main window.



3. Select the **Import From Local** radio button. If the location of the call sheet isn't mapped out, press the **Browse** button and find the call sheet.



4. Select the correct call sheet in the call sheet list panel. Double check the call sheet number to ensure the call sheet is for the job you are performing.

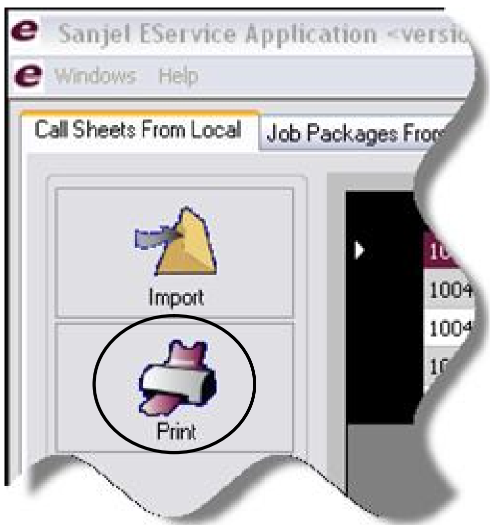


5. Press the **Finish** button 

at the bottom right corner to finish importing the call sheet.

To Print the Call Sheet

1. Press the **Print** button on the **Call Sheet** main window once the call sheet is loaded.



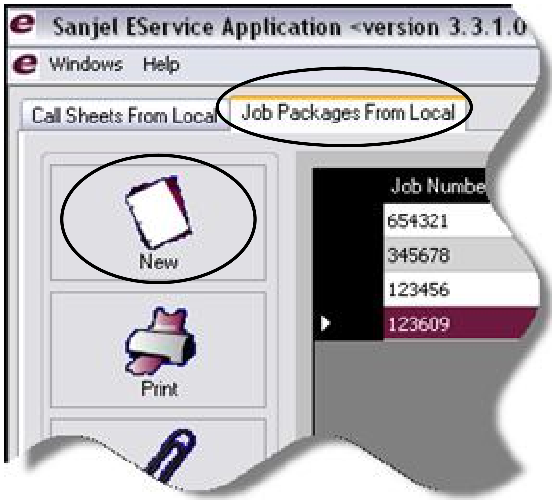
2. Check the **Print Call Sheet** check box to print the call sheet. You can also print the departure meeting sheet by checking the **Print Departure Meeting** check box.

3. Press the **Print** button 

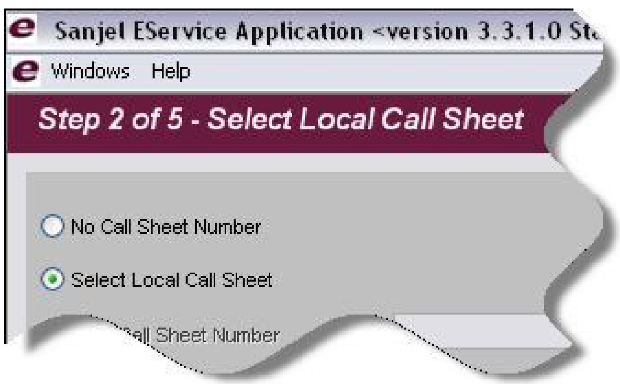
at the bottom right corner of the window.

To Start Creating the Job Package

1. Select the **Job Packages From Local** tab at the top of the **Call Sheet** main window. This brings up the **Job Package From Local** window.



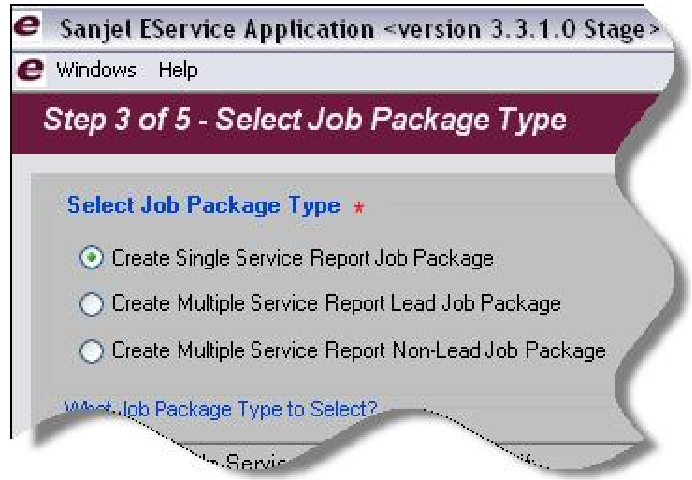
2. Press the **New** button.
3. Select the **Select Local Call Sheet** radio button.



4. Select the correct local sheet on the call sheet list. Double check and ensure the call sheet you selected is for the job you are performing.

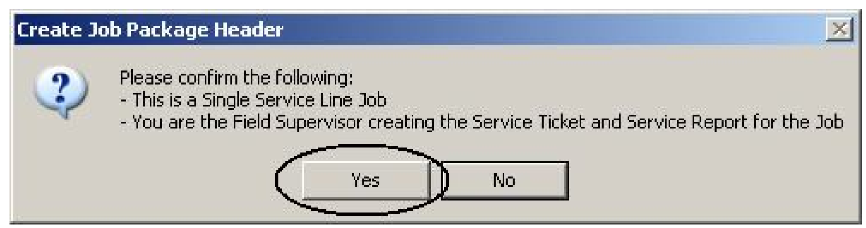
5. Press the **Next** button 

at the bottom right corner of the window.
6. Select the correct job package type.



NOTE: eService will prompt you if you don't select the correct type.

7. Press the **Yes** button on the pop-up window.



8. Enter the service ticket number. Ensure that you match the number in your ticket book.

9. Once you press the **Next** button , you will be prompted to re-enter the ticket number. Ensure you match the ticket number to be able to continue.
10. Then check the information entered by the dispatcher and ensure all the information is correct.

NOTE: It is very important to verify the job date. If you are getting eService ready for the next day, make sure to enter the date of the job being performed because eService automatically inserts the date you are working on it.

11. Press the **Finish** button .

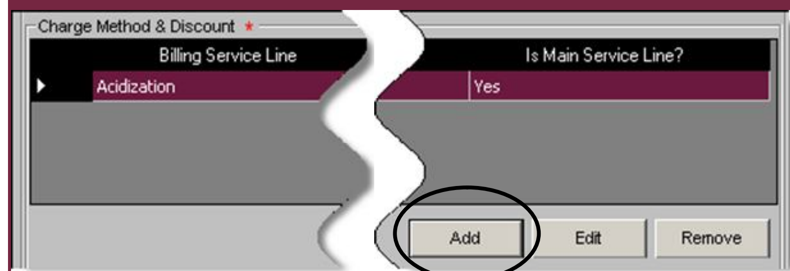
To Add a Service Ticket

1. Press the **Add Service Ticket** button on the **Job Package From Local** window.

2. Check that the information under the **Billing Service Line** is correct.

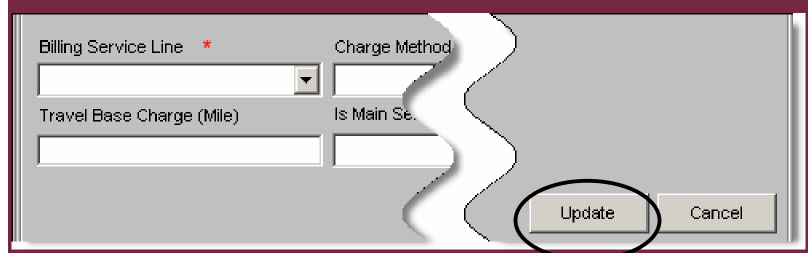
TIP: How to fill tables in eService?

In the process of creating documents using eService, you will be asked to fill some tables. A table in eService usually consists of a grid area and three buttons at the bottom right corner of the grid. The following shows the **Charge Method & Discount** table as an example.



To fill the table:

1. Press the **Add** button. The input area appears.



2. Enter the required information in the input area.
3. Press the **Update** button once you are done. The new information then appears in the grid area.

The table configuration is different from table to table, but overall, the procedures of filling the tables are very similar.

3. Add miles (actual miles) to the box under the **Travel Base Charge** line.
4. Add **Line Items** according to the price page in the job program and follow the same order of the price page.

NOTE 1: The **Charge Method** should be entered before you input any line items. Once line items are entered, the **Charge Method** will be grayed out, disabling any changes.

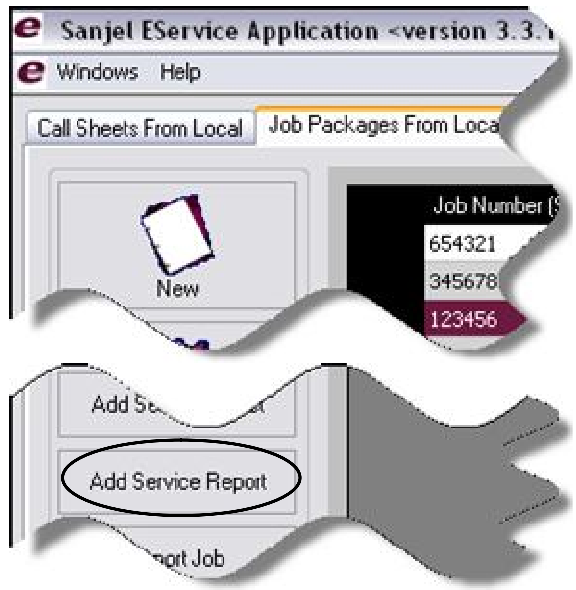
NOTE 2: If it is a bid price, you must enter all services charged at the base price of zero—then add what bid price is.

5. Press the **Finish** button 

once all the required fields are filled.
6. Press the **OK** button on the pop-up window.

To Add a Service Report

1. Press the **Add Service Report** button on the **Job Package From Local** window.

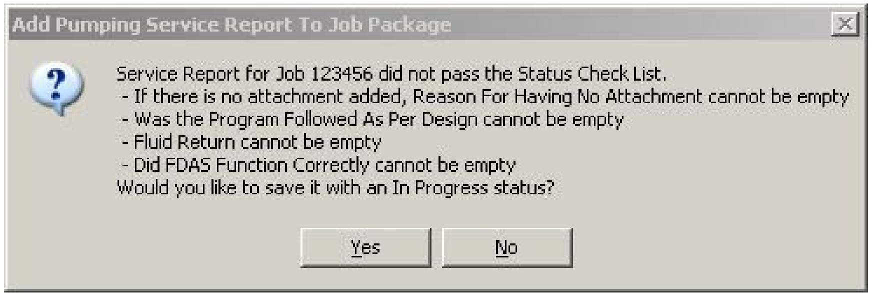


2. Press the **Next** button 

.
3. Press the **Finish** button 

.

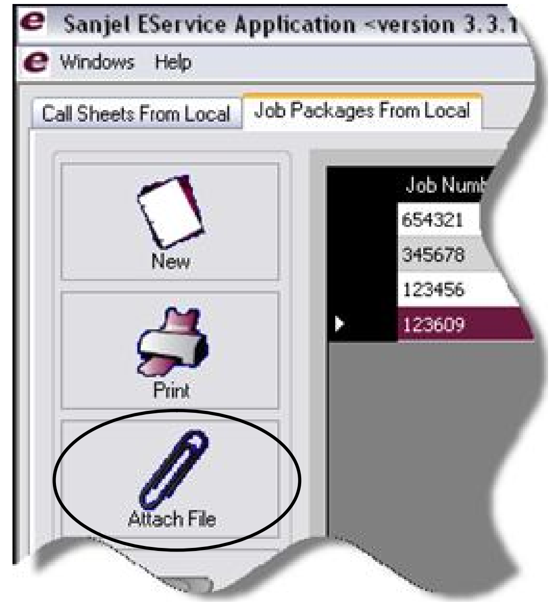
4. Press the **Yes** button on the pop-up window.



To Attach Files to the Job Package

Once you have finished all the documents and all the information is correct, you may need to attach some job related files to the job package. To attach files to the job package:

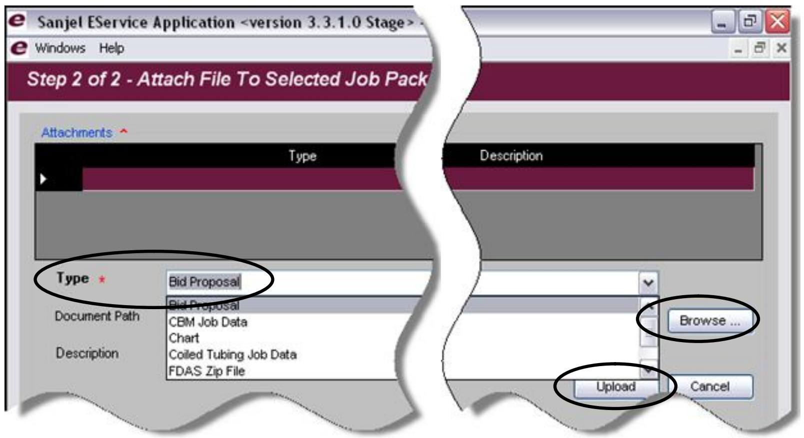
1. Press the **Attach File** button on the **Job Package From Local** window.



2. Press the **Add** button.

3. Select the correct file type.

NOTE: The FDAS zip file needs to be transferred from the Toughbook to the laptop via a USB key. See the TIP under step 4 for how to transfer.



4. Press the **Browse** button to find the file to be attached, and then press the **Upload** button 

to upload the file.

TIP: For pumping services, the FDAS files are created in the Toughbook not the laptop. How to attach the FDAS files to the job package?

To attach the FDAS files to the job package:

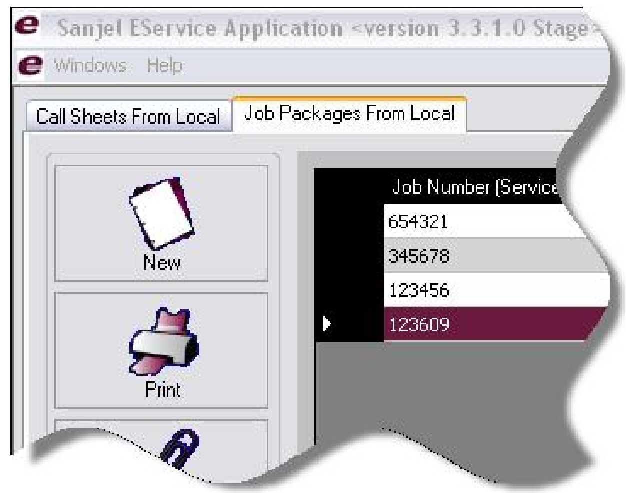
1. Zip all the FDAS files in the Toughbook.
2. Copy the FDAS zip file to a USB key.
3. Plug the USB key into the laptop.
4. Press the **Browse** button to find the FDAS zip file in the USB key, and then press the **Upload** button to upload the file.

5. Repeat the process for other files to be attached.
6. Press the **Finish** button 

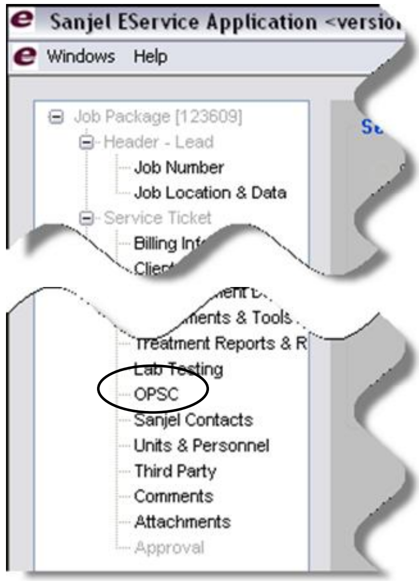
at the bottom corner of the window when all files have been added.

To Fill in the OPSC Page

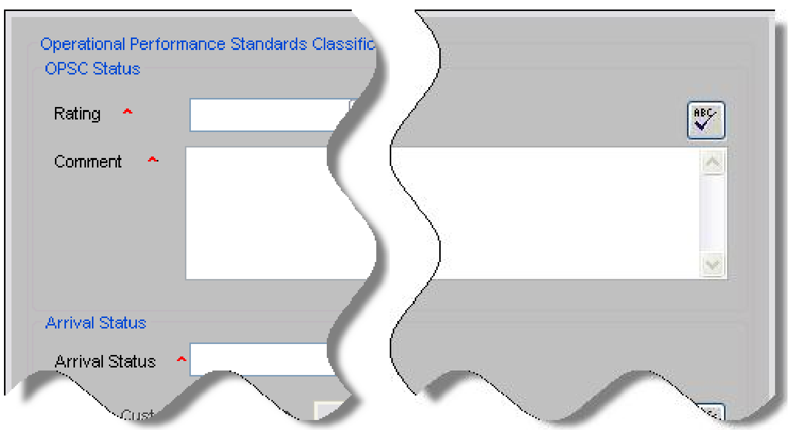
1. Select the job package that you are going to fill in the **OPSC** page.



2. Double click the job package. This brings up the job package **Tree View** window.



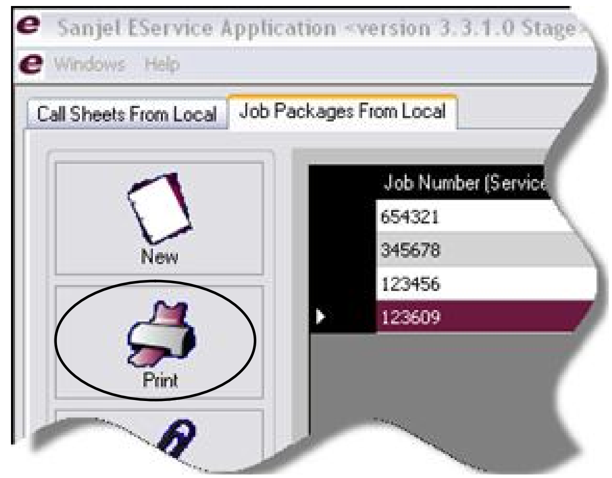
3. Click the title **OPSC** in the **Tree View** to open the **Operational Performance Standards Classification** (**OPSC**) page.



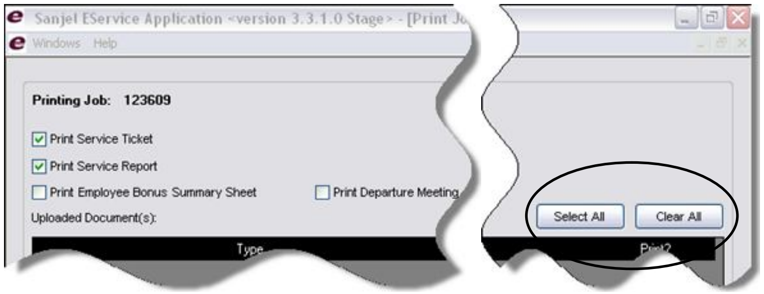
4. Fill in all the fields with the red asterisk.

To Print the Job Package

1. Select the job package to be printed and press the **Print** button. This brings up the **Print Job Package** window.



2. Select the reports that you are going to print. Press the **Select All Button** if you are going to print the attached files. Press the **Clear All Button** to de-select the attached files.

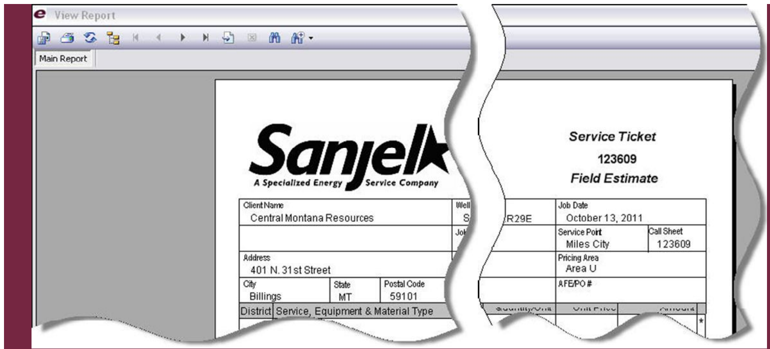


3. Select the **Print** button Print at the bottom right corner of the window.

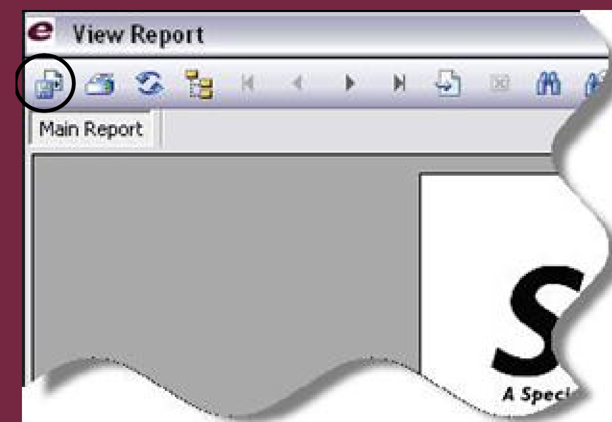
TIP: For pumping services, the printer is connected to the Toughbook not the laptop. How to print the service tickets and service reports using the printer connected to the Toughbook?

To print a service ticket and service report:

1. Plug a USB key to the laptop.
2. Select the job package to be printed and press the **Print** button. This brings up the **Print Job Package** window.
3. Check the **Print Service Ticket** and **Print Service Report** check boxes.
4. Select the **Print** button at the bottom right corner of the window. This opens up the service ticket window.



5. Select the save button at the top left corner. This brings up the **Export Report** dialog box.



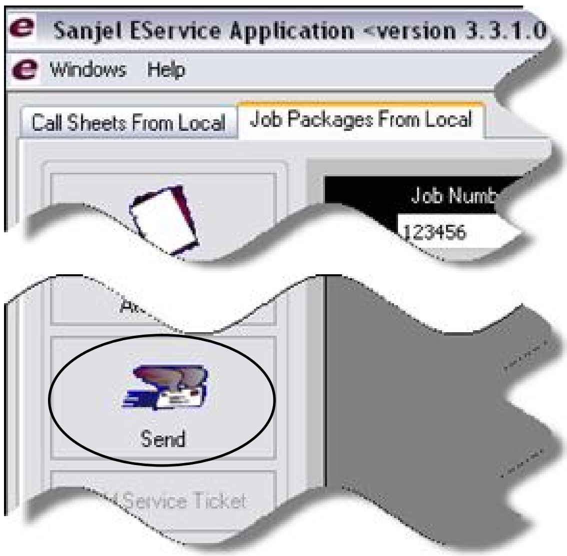
6. Browse the location of the USB key in the **Export Report** dialog box and save the service ticket as a PDF file to the USB key.
7. After the service ticket has been saved, close the service ticket window. Once the service ticket

window is closed, the service report window opens up.

8. Repeat step 1 through step 6 to save a copy of the service report to the USB key.
9. Plug the USB key into the Toughbook, and then print the service ticket and service report.

To Send the Job Package

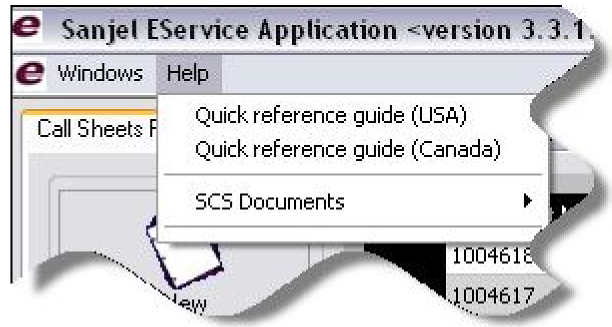
1. Select the correct job package to be sent.
2. Press the **Send** button.



3. Press the **Yes** button on the pop-up window to confirm your send.

The Help Tab

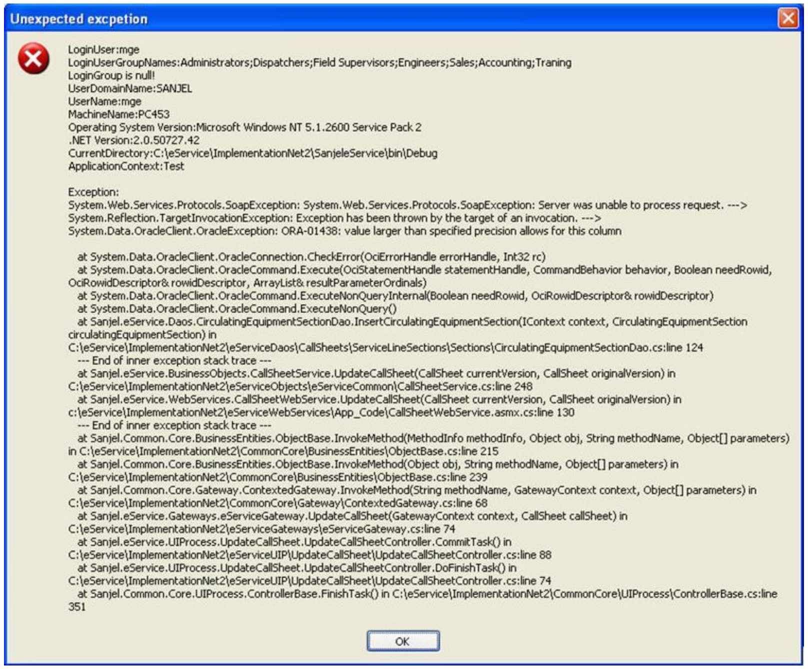
The **Help** tab is located in the menu bar. Pressing the tab opens a drop-down menu. In the drop-down menu, you can find the eService USA and Canadian quick reference guides as well as the SCS documents.



NOTE: To make the **SCS Documents** menu item appear, press the **Windows** tab and select **Update Reference Data**.

FAQ

What to do if I get an exception?



1. Press the **OK** button.
2. Save your work by pressing the **Finish** or **Save** button. Make sure to note the call sheet or service ticket number of the artifact that your were working on.
3. Close eService.
4. Start eService.
5. If unable to complete your work, then contact the IS Service Desk.

What to do if I can't use eService?

If you can't use eService on a job, zip all the post-job files and send an email to:

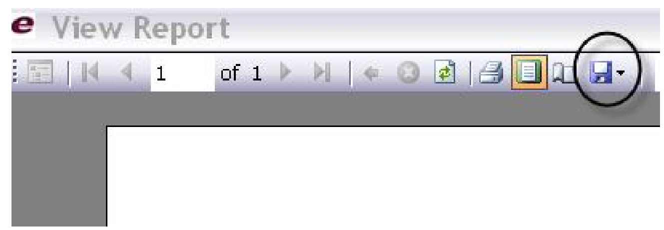
- Fracturing: eservicefilefrac@sanjel.com
- Coiled Tubing: eservicefilecoiled@sanjel.com
- Nitrogen: eservicefilen2@sanjel.com
- Pumping: eservicefilepumping@sanjel.com

In the **Subject** area put: *[Post Job Files] – [Job Number].*

How do I save a copy of the Bonus Summary Sheet?

Once the **Print** button is selected, the **View Report** screen opens up.

1. On the top menu bar, select to **Export** the document.



2. Select either **Excel** or **PDF.**
3. Save the document to a location on your local.

NOTE: The document can be edited within Excel and Adobe if you have a PDF editing tool.

When do I complete the Departure Meeting Form in eService?

The **Departure Meeting Form** needs to be completed anytime that a group of Sanjel employees are travelling to or from a Job.

Troubleshooting Guide

Dispatch Troubleshooting

Problem	Possible Cause and Solution
Call sheet not showing on grid	• Search not set properly • Dispatch district not set as same as search
Cannot export call sheet	• Call sheet still in-progress status • USB memory disk not connecting
Cannot log in as a dispatcher	• No connection to the server • Not an authorized user for dispatcher
Additional equipment not showing	• Didn't select equipment on "Service Line Section Information"
Additional equipment not linking threads/sizes	• No data entered in "Well Profile"
Incorrect units showing in unit dropdown	• Asset Database may not be updated by Operations/Finance
Cannot print	• Didn't press the **Print** button • There is a lag time for "View Report" to open
Employee's name not showing in Sanjel employee dropdown menu	• Dropdown organized by last name first • Incorrect spelling • If new employee, may not yet be entered into database
Cannot attach Attachments	• Must be in PDF or Zip format
Attachment didn't attach to call sheet	• Update grid was still open when "Finish" was pressed

Supervisor Troubleshooting

Problem	Possible Cause and Solution
Cannot log in to eServices	• Not authorized as a field supervisor • If the employee hasn't logged into this laptop or unit's tough book, NetMotion must be established to authorize the user from server. • If the employee hasn't logged into this laptop since cache has been cleared, NetMotion must be established to authorize the user from server.
Call sheet from local – call sheet not showing on grid	• Call sheet not yet imported • Search options not set properly • Call sheet required wasn't on USB memory disk
Job Package from Local – Job package not showing on grid	• Search not properly configured • Job package was canceled not saved
Cannot find price code	• Incorrect billing service line selected
Entering a product not in Sanjel price book	• Enter any new/third party products under price code # 2999
Entering a service not in Sanjel price book	• Enter any new/third party services under price code #2991
Wrong pricing area	• Correct the Unit Price in the Line Items section and add a comment in the Service Report General Comments section
Employee's name not showing in Sanjel employee dropdown menu	• Dropdown organized by last name first • Incorrect spelling • If new employee, may not yet be entered into database
Cannot attach Attachments	• Must in PDF or Zip format
Attachment didn't attach to job package	• Update grid was still open when finish pressed
Cannot print	• Didn't press the **Print** button • Didn't select "Print Service Ticket"/"Print Service Report" checkboxes • Can be a wait for "View Report" to come up at times
Send – Status remains as "In-route"	• No wireless communication • NetMotion not connected