**Phase 3**

**Backlog**

* **1 Month View Modification**
  + **https://github.com/Sanjel-Energy-Services/DigitalResourceBoard/issues/565**
* **Map View – Full Screen**
  + **https://github.com/Sanjel-Energy-Services/DigitalResourceBoard/issues/577**
* **Sliding Jobs – Cursor does not keep up**
  + [**https://github.com/Sanjel-Energy-Services/DigitalResourceBoard/issues/505**](https://github.com/Sanjel-Energy-Services/DigitalResourceBoard/issues/505)
* **Adding Map layers – show road conditions and accidents**
  + [**https://github.com/Sanjel-Energy-Services/DigitalResourceBoard/issues/523**](https://github.com/Sanjel-Energy-Services/DigitalResourceBoard/issues/523)
* **Add Map filter for rig status and show all rigs**
  + [**https://github.com/Sanjel-Energy-Services/DigitalResourceBoard/issues/461**](https://github.com/Sanjel-Energy-Services/DigitalResourceBoard/issues/461)
* **Complexity Score on Forecast**
  + [**https://github.com/Sanjel-Energy-Services/DigitalResourceBoard/issues/454**](https://github.com/Sanjel-Energy-Services/DigitalResourceBoard/issues/454)
* **Project Start & End on Forecast**
  + [**https://github.com/Sanjel-Energy-Services/DigitalResourceBoard/issues/510**](https://github.com/Sanjel-Energy-Services/DigitalResourceBoard/issues/510)
* [**Map - Have different icons for each map point type**](https://github.com/Sanjel-Energy-Services/DigitalResourceBoard/issues/197)
  + [**https://github.com/Sanjel-Energy-Services/DigitalResourceBoard/issues/197**](https://github.com/Sanjel-Energy-Services/DigitalResourceBoard/issues/197)
* **Bulk Plant Icon**
  + [**https://github.com/Sanjel-Energy-Services/DigitalResourceBoard/issues/262**](https://github.com/Sanjel-Energy-Services/DigitalResourceBoard/issues/262)
* **Map – Have different icons for each map point type**
  + [**https://github.com/Sanjel-Energy-Services/DigitalResourceBoard/issues/197**](https://github.com/Sanjel-Energy-Services/DigitalResourceBoard/issues/197)
* **Edit all recurring jobs when edit one from the series**
  + [**https://github.com/Sanjel-Energy-Services/DigitalResourceBoard/issues/279**](https://github.com/Sanjel-Energy-Services/DigitalResourceBoard/issues/279)
* **When companies are collapsed, show work on collapse**
  + [**https://github.com/Sanjel-Energy-Services/DigitalResourceBoard/issues/333**](https://github.com/Sanjel-Energy-Services/DigitalResourceBoard/issues/333)

**New Phase 3 Items**

* **Map View - Add “Satellite” view – this may be included with #523**
  + - Ability to see all the range roads to see how to get to location
* **Map View – Add additional equipment to map, backed on BeWhere tracking software**
  + **Bins**
  + **Pumping trailers**
  + **Make flexible, that we can additional types of items, including icon, using config**
* **Forecast - Add travel time to each job** – use distance and estimated speed (80 km/hr) to convert to a time (hours)
  + On the forcast sheet daily view, highlight travel time before and after job time, different color.
  + KM to location, is imported from the program
  + Add to job hover – travel time is linked to job
  + View in Edit job
    - Dispatch and ops managers (assistant mg and up)
* **Forecast - Update utilization calculations to hourly**
  + - Once people (Phase II) and travel time (Phase III) are available
    - Update forecast with actual times once eService is complete
* **Forecasting UI -** Sales

Graphical user interface, application

Description automatically generated

* + Must be mobile friendly
    - Sales team can enter details on the fly / from their phone
    - Can be entered on a computer
  + Sales team should be entering their own data
    - Permissions??
    - Sales manager to review prior to being “live” – moved to operations forecast
  + How does the process work?
    - Once the data fields are entered, the jobs are then automatically entered into the forecast tool (once approved by sales manager)
    - Sales will have a view of all their data
    - Approved data shows up on Ops forecast
  + Data fields
    - Confirmed (Status)
    - District (Service Point)
    - Company (Client)
    - Rig
      * May need to look at what list this is….
    - Area
    - Start Date (Project/Rig start date)
    - Finish Date (Project/Rig completion date)
    - Program #(s)
    - Job Type(s)
    - Well count
    - # of strings
    - # of cemented strings (should match program)
    - Frequency (time between jobs)
      * Compare actual to estimated – provide notification if faster or slower and required modifications to remaining project – Yes or no
      * Time between spud and surface
      * Surface and Int
      * Int and prod …
    - Drill Order/Batch drill? (all surfaces, then next strings)
    - Estimated Revenue (From program once entered)
      * May not be required
    - 3rd Party Products (Added to program)
    - Sales Rep
    - Comments (free text)
    - Sales team wants their own view
      * Details to come
      * Control over what is shown on the operations forecast sheet – approval / publish
        + Sales has bids, 2nd call, and potential work that will be on their view but not on operations – need an approval
      * Their sheet may be much further out
      * Have a gant view
      * Have table view
      * Will want to see measures of jobs per day trending
        + Other
        + Should be easy in Power BI
    - What happens if the rig is not on the rig board?
      * Use Temp rig
        + Or add rig to rig board
      * Dispatch to update later
    - What happens if the service point and rig do not match eService?
      * The change will occur on the start date
      * Have warning requiring acknowledgment
        + Show details of current project
    - What if the Rig and client do not match?
      * Change rig to new client at the start date
      * Have a warning requiring acknowledgment
        + Show details of current project
    - Add # of jobs based on start date and well count
    - Program # required at forecast to do product and revenue forecasting
      * May not include revenue – currently a separate process
    - Eg. Program has Surface, Intermediate and Production
      * 10 well count program
        + This will require 10 surfaces, 10 Intermediates and 10 Production jobs to be added
      * Start date = X
        + The first surface is the **day after** the start date
      * # of strings can come from the program
        + This is # of job types in program
      * Revenue can come from the program
        + Sum of each of the job type revenues
        + This may not be required
      * Time between jobs
        + Can we calculate this time from previous work the rig has done?
  + What is the minimum data required?
  + This data to be shown in the Sales Forecast
    - Require approval to move to the operations forecast
* Lab Database
  + Complete lab minisprint backlog items
    - Water analysis loading too slowly #62
    - Fluid loss shows incorrect units #60
    - B5 vs B1 rheology #52
    - Change columns in Quality control grid #61
    - Add additional of test types #64
    - Differentiation in hesitation and nonhesitation #53
      * 2 test types – TT and TT Hes
    - Add compressive strength method – Cube / UCA #63
    - Add test types to data grid #64
    - Add surface rheology to rheology #65
    - Add a field to rheologies to have multiple rheologies in one iteration – eg. Temperature #66
    - QC test request #67
    - Sample login #68
    - Sample login label change #69
    - Quality control – search by login # - #70
  + Ensure all tests are being stored in lab db
    - Simplified 1 page report that imports
      * If we want to redo the 1 page report
    - \*\*\*Need a test request\*\*\* Not all imperial jobs have test requests
  + Additional Test Items
    - Minimize time to populate database
      * Can the upload process be streamlined / integrated?
    - Add linkage to bulk plant load ID
    - Add time to 100 lb/100ft2 for SGSA test
    - Add wettability/compatibility
    - Specify preblend/prehydrate – for preflushes/spacers
    - Add conditioning time
    - Add heating time
* Template (Sanjel)
  + Lab Request ID and Iteration #
    - Per blend

**Phase 4**

**Focus: Workflow**

* **Add backlog items**
* **Complexity Matrix** 
  + Workflow & Approvals
    - Program request – program available
    - Call sheet – job package
      * Prejob testing status
      * Blend request
      * Bulk plant blend sheet
      * Approved blend sheet
      * Blending status
      * Blended product stored
      * Blended product submitted to lab
      * Received at lab
      * Testing progress
      * Testing complete
        + Meets requirements

Send to CS for approval

* + - * + Does not meet requirements

Send to CS for approval/next steps

* + - * Testing approved by CS
      * Testing approved by Ops
      * Testing approved by Client (may be required)
      * Testing Not approved – reblend and resubmit samples for testing
      * Approved to haul to location
      * Bulkers waiting to be shipped to location
      * Arrived on location
        + Product, people, equipment
      * Job started
      * Job complete
* **Map View - Ability to determine distances between locations**
  + - Current and future
    - Travel time to location – potential arrival time
    - Determine crew that can arrive 1st
      * Who has HOS
      * Minimal travel time
* **Forecast - Mobile Employee Work Schedule**
  + - Ability to see own work schedule on mobile phone
    - What jobs am I scheduled for?
    - When are my jobs scheduled?
    - Where are my jobs?
    - What are some job details?
    - What does my next 48 hours look like?
    - When am I expected to be at the shop?
    - Can I receive text (or other) notifications on job alert
* **Product Requirement & Revenue Forecasting – this should be a BI exercise**
  + Require program # per job in forecasting
    - Details by week (date) – provide BI
    - Details by district – provide BI

**Phase 5**

**Focus: Communication**

* **Add backlog items**
* **People Details (HOS)**
  + hrs worked
  + hrs available
  + Reset time
  + Call time
* **Communication - Confirmation emails**
  + Ability to easily contact client with confirmed information for agreement
    - Alert Communication
    - Follow-up Communication
    - Final Communication
  + Need to maintain communication log per well / rig etc
* **Communication – Pumper location**
  + Once trucks are dispatched, send client link to see trucks on their way to location. They can see only trucks heading to their location (UBER/SKIP)
* **Replacement of the lates & ETA emails as follows:**

A picture containing text

Description automatically generated