

## Business Process Work Group: face-to-face

<b>Location</b>	Schlumberger iCenter - iProduction	<b>Chair</b>	Jana Schey
<b>Date</b>	11/9/2006	<b>Co-Chair</b>	

### Agenda

<b>Item</b>	<b>Subject</b>	<b>High Level Summary/Issues</b>
1.0	<b>Introductions and Code of Conduct</b>	All participants are bound to observe the Sherman antitrust and/or European anti-competition laws.
2.0	<b>Meeting Schedule</b>	Date: 11/9/2006 Time: 9:00am-12:00pm CT
3.0	<b>Meeting Agenda</b>	<ol style="list-style-type: none"> <li>1) Welcome and Anti-Trust Reminder</li> <li>2) Project Purpose</li> <li>3) Issues/Pain Points</li> <li>4) Vision</li> <li>5) Scope</li> <li>6) Actors/Stakeholders</li> <li>7) Alternate Terminology</li> <li>8) Related Processes</li> <li>9) Process Flow Diagram – Current Process</li> <li>10) Field Ticket Purpose</li> <li>11) Assumptions</li> <li>12) Questions for Consideration</li> <li>13) Data Field Requirements</li> </ol>
4.0	<b>Meeting Details</b>	<p>With respect to the vision of this project, it was determined that we need to focus closely on facilitating more efficient Field Ticket data exchange and reduced reconciliation effort for both supplier and buyer.</p> <p>Field ticket process w/in Order to Pay cycle with focus on automation of processes by providing FT electronically.</p> <ul style="list-style-type: none"> <li>– Field Ticket</li> <li>– Field Ticket Response</li> <li>– Work Order to Invoice Reconciliation (Macro)</li> <li>– Electronic exchange of field ticket data (micro)</li> </ul> <p>Not in scope: ERS</p> <p>Parking Lot:            Consignment            Field Ticket Cancellation (e.g., for major adjustments)</p> <p>Field Ticket and possibly Field Ticket Response are the vehicles for this data exchange. We need to make sure we have an accurate definition of the field ticket. One of the major issues we deal with today is FT approval, esp. at unattended sites.</p>

Currently, suppliers must find a supervisor to manually sign off on field tickets which often involves traveling to other sites to find them. One of the major goals of this project is to determine best practices for obtaining field ticket approval/authorization in an electronic manner. This may occur on site or after the fact in some cases.

In addition to FT approval, we need to determine best practices/requirements for electronic transmission, preferably not involving a manual methodology (e.g., USB drive, etc.). We want to minimize duplication of effort, manual processes and errors.

Some companies have stated their goal is to no longer accept paper of any kind on the worksite; to enable this goal, approved field ticket data must be transmitted electronically to both operator and supplier target systems.

We need to beware of scope creep and adding information to the field ticket that may not be appropriate for this document. For example, some companies include safety data – is this appropriate? If so, we need to make sure the appropriate fields are available on the PIDX XML Field Ticket and/or FT Response.

Jana will do a gap analysis against the PIDX XML FT if various companies will share sample field tickets. We want to make sure fields are not hijacked to do something other than intended in the standard.

#### DEFINITION

The field ticket is a communication device:

- Estimate of work performed, products delivered, quantity, financials
- Operator agreement
- Additional information (e.g., coding, etc.)

Suppliers:

- Legal documentation of work performed and products delivered/Operator acceptance
- Additional operator information
- Basis to create invoice
- Time sheet potential

Operators:

- Invoice reconciliation
- Capture costs/liabilities
- Metrics gathering opportunities (spend, performance, etc.)
- Logistics and routing (e.g., taking delivery then moving to another location)
- Materials inventory
- Safety information?

#### ALTERNATE TERMINOLOGY

- Delivery ticket
- Delivery work ticket (DWT)
- TOUR sheet (daily drilling activities)
- Work ticket
- Service Order
- Sales Order
- Confirmation
- Receipt

We reviewed a diagram of the current field ticket process. It was requested that the Goods Receipt/Confirmation Process be noted as well as a box for the electronic FT data sent to the Operator. The Current Field Ticket Process diagram has been updated accordingly and accompanies these notes.

#### Assumptions we agreed to:

1. Approved, valid field ticket is required by both supplier and operator. Today, this is a scanned attachment to invoice.
2. Electronic field ticket in advance of invoice is of interest to both parties.
  - a. For suppliers, this may mean no longer providing scanned attachment, reduced data routing requirements of operators (e.g., hand-written GL codes, etc.) and data entry error reductions.
  - b. For operators, electronic data enables more automated reconciliation with invoice, an opportunity to capture liabilities earlier and accounting data retention.
3. Data should be entered and transmitted such that dual entry is not required (e.g., into operator systems).
4. Approved, "locked" (i.e., unalterable financials) document is available to both trading partners.
5. PIDX XML Field Ticket / Response will be the vehicle to convey field ticket data.
6. Process must handle one-to-many and one-to-one field ticket to invoice scenarios.
7. No attachments to the Field Ticket.

#### Questions that require resolution (some with at least preliminary answers):

1. Is pricing a field ticket requirement? **Yes**. To what level (e.g., complex pricing/price structure)? **Must satisfy**

***current requirements for the scope of this project.***

2. What information needs to be provided at time of order to facilitate electronic field ticket process? Need to define best practices. ***Key win would be a reference # or code from the operator and one from the supplier that will point to all relevant information in their respective systems.***
3. How is additional supporting documentation handled? ***Remains with the invoice. Additional supporting documentation is outside the scope of this project. These may include: weight tickets, load sheets, etc. In general, additional documentation should be handled after the fact unless it directly influences FT approval.***
4. How are changes to field ticket handled (applied post signature)?
  - a. Additional charges (e.g., third party services) - ***line item coding may be a solution***
  - b. Significant adjustments (e.g., truck weight, missing charges) – ***focus on minor adjustments – major adjustments are fairly rare and would be handled by hand – cancellations and major adjustments are outside of scope***
5. What information needs to be on the field ticket to meet everyone's needs and do we have fields available? ***Gap analysis task – be careful not to expand functionality of field ticket beyond original intent (at least for now)***
6. What is mechanism for electronic authorization? ***TBD***
7. How can field ticket be conveyed to customer? ***Should be electronic data transfer – may be onsite or after the fact but should not be document on a portable USB drive or Email.***
8. What happens if supervisor makes changes in the field? ***TBD***
9. How do we handle unattended sites? ***Ideally, electronic processing should address this need although company requirements will play a role.***

## 5.0 Action Items

- Suppliers/Operators – representatives talk to their respective Legal Depts to find out if they are required to have a physical signature (likely not since there are various pilots involving electronic processes out there). Having said that, if actual signature is required, are there legal requirements with respect to when and how they are

obtained? If not, what other mechanisms are acceptable to indicate receipt and fulfill any legal requirements that may exist?

- Suppliers/Operators/others – I've asked anyone who is willing to share their field ticket(s) with me so I can create a consolidated list of fields used and then do a gap analysis with the existing PIDX XML Field Ticket/Response. Please provide no later than 11/17 and preferably sooner.
- Jana – Meeting Notes, field gap analysis, revised current process diagram and first pass at electronic process diagram. Schedule next meeting for week of 12/11 – everyone wanted to meet again before the end of the year if possible.

**6.0 Next Steps**

- Forward action item deliverables to Jana Schey prior to the next meeting
- Continue to work field ticket issues at next meeting

**7.0 Upcoming Meeting(s)**

December 13, 2006 – 8:30am-3:00pm CT  
Schlumberger's iCenter – iProduction Room  
1325 South Dairy Ashford Rd, Houston, TX, 77077  
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**Attendees (A=Attendee, C=Conference Call)**

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